



Application Notes for Configuring Acqueon iAssist Call Survey Manager with Avaya Aura® Application Enablement Service and Avaya Aura® Experience Portal – Issue 1.0

Abstract

These Application Notes describe the configuration steps required to integrate the Acqueon iAssist Call Survey Manager with Avaya Aura® Experience Portal. iAssist Call Survey Manager is a performance and quality assurance application that allows customers or subscribers to provide feedback about their contact center call or product experience. iAssist Call Survey Manager is used to create, add, preview, modify, and remove surveys.

Readers should pay attention to **Section 2**, in particular the scope of testing as outlined in **Section 2.1** as well as any observations noted in **Section 2.2**, to ensure that their own use cases are adequately covered by this scope and results.

Information in these Application Notes has been obtained through DevConnect compliance testing and additional technical discussions. Testing was conducted via the DevConnect Program at the Avaya Solution and Interoperability Test Lab.

1. Introduction

These Application Notes describe the configuration steps required to integrate the Acqueon iAssist Call Survey Manager (CSM) with Avaya Aura® Experience Portal (Experience Portal). CSM is a performance and quality assurance application that allows customers or subscribers to provide feedback about their call center or product experience. CSM is used to create, add, preview, modify, and remove surveys.

CSM allows callers to participate in an automated survey application configured on Experience Portal. Surveys can be created and assigned dynamically and survey reports can be captured and analyzed. This helps the organization to improve quality, customer and employee satisfaction. CSM also provides flexibility in questionnaire design, storage of caller responses in a database, and generating reports for easy analysis of the survey. CSM allows the creation and design of questionnaires with as many questions as desired. The sequencing of the questions may be dynamic based on caller's previous answer selection. Typical surveys cover caller experience on their interaction with agents and product feedback. After a caller has completed the call with agent, the call is transferred to CSM so that the caller can participate in a survey offered by CSM. iAssist (RapCTI module) integrates with AES via TSAPI interface to monitor VDNs. CSM applications are configured on Experience Portal and are hosted on iAssist Admin server.

Another Acqueon related solution is described in Application Notes for Acqueon iAssist Call Back Manager with Avaya Aura® Application Enablement Services and Avaya Aura® Experience Portal. This is mentioned here since, generally, CSM and iAssist Call Back Manager reside on the same server and are used in conjunction.

2. General Test Approach and Test Results

This section describes the interoperability compliance testing used to verify the CSM application with Experience Portal. The interoperability compliance test included feature and serviceability testing.

The feature testing focused on routing calls to Experience Portal and running the iAssist CSM application to allow the caller to provide agent or product feedback. After the survey was completed, a survey report was generated to review the survey responses. In addition, it was verified that the CSM application handled error conditions, such as entering an invalid response; properly. iAssist CSM has the ability to place outbound calls to PSTN lines for surveys.

The serviceability testing focused on verifying the ability of iAssist Admin server and Avaya Aura® Experience Portal to recover from adverse conditions, such as power failures and disconnecting cables to the IP network.

DevConnect Compliance Testing is conducted jointly by Avaya and DevConnect members. The jointly-defined test plan focuses on exercising APIs and/or standards-based interfaces pertinent to the interoperability of the tested products and their functionalities. DevConnect Compliance Testing is not intended to substitute full product performance or feature testing performed by

DevConnect members, nor is it to be construed as an endorsement by Avaya of the suitability or completeness of a DevConnect member's solution.

Avaya recommends our customers implement Avaya solutions using appropriate security and encryption capabilities enabled by our products. The testing referenced in these DevConnect Application Notes included the enablement of supported encryption capabilities in the Avaya products. Readers should consult the appropriate Avaya product documentation for further information regarding security and encryption capabilities supported by those Avaya products.

Support for these security and encryption capabilities in any non-Avaya solution component is the responsibility of each individual vendor. Readers should consult the appropriate vendor-supplied product documentation for more information regarding those products.

For the testing associated with these Application Notes, the interface between Avaya systems utilized enabled capabilities of TLS/SRTP but the Acqueon iAssist Call Survey Manager did not include use of any specific encryption features as requested by Acqueon.

2.1. Interoperability Compliance Testing

Interoperability compliance testing included feature and serviceability testing. The feature testing focused on the following functionality:

- Routing incoming and outgoing calls to/from Experience Portal via H.323 channels on Communication Manager.
- Experience Portal successfully running the CSM application.
- The ability of caller and callee to complete the surveys successfully.
- Verifying the correct response to invalid entries by callers.

The serviceability testing focused on verifying the ability of the iAssist Admin server and Experience Portal to recover from adverse conditions, such as power failures and disconnecting cables to the IP network.

2.2. Test Results

All executed test cases passed.

2.3. Support

For technical support on the iAssist Survey Manager, contact Acqueon via phone, email, or internet. You can also raise the ticket in our Acqueon portal by using your Issue Trak Login ID. You can reach our Product Support desk by reaching below Contact number.

- **Phone:** +91 44 3089 4888/+91 44 6108 4888(APAC and MEA)
+1 888 946 6878(USA and Europe)
- **Email:** support@acqueon.com
- **Web:** <http://acqueon.issuetrak.com>

3. Reference Configuration

Error! Reference source not found. **Figure 1** below depicts the lab configuration used for testing. In this configuration, Experience Portal interfaces with Communication Manager via H.323. The iAssist Admin server hosted the CSM application and RapCTI module. The Acqueon iAssist Admin server used the Microsoft SQL Server database.

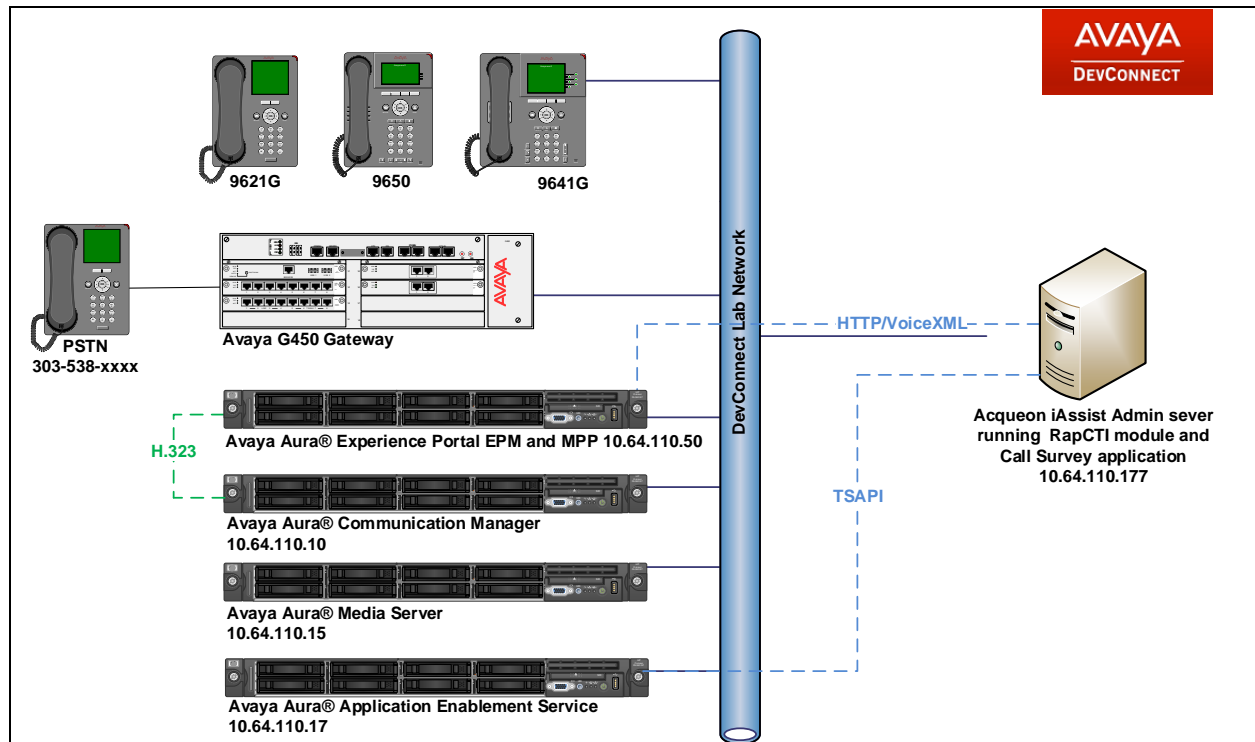


Figure 1: Test Configuration Diagram

4. Equipment and Software Validated

The following equipment and software were used for the sample configuration provided:

Equipment/Software	Release/Version
Avaya Aura® Communication Manager running on Virtualized Environment	7.1.3 R017x.01.0.532.0 Build 24515
Avaya Aura® Application Enablement Services running on Virtualized Environment	7.1.3.0.1.7-0
Avaya Aura® Media Server running on Virtualized Environment	7.8
Avaya Aura® Experience Portal running on Virtualized Environment	7.2.1.0.0605
Avaya G450 Media Gateway	38.19.0
Avaya 9641GS H323 IP Deskphone	6.6.6
Avaya 9621G SIP IP Deskphone	7.1.29
Acqueon iAssist Admin server running on a Virtualized Environment hosting: RapCTI module Call Survey Manager applications Avaya Aura® Orchestration Designer (aesconnector and runtimeconfig)	Microsoft Windows Server 2012 R2 Microsoft SQL Server 2012 2.2.1.17 AT8 C115 7.2 Feature Pack 1

Note: aesconnector.jar was running on Acqueon iAssist Admin Server, is owned by Avaya. This aesconnect.jar file comes bundled with Avaya Aura® Orchestration Designer package.

5. Configure Avaya Aura® Communication Manager

This section provides the procedures for configuring Communication Manager via the System Access Terminal (SAT). The procedures include the following areas:

- Administer Hunt Groups for Agents.
- Administer Agent IDs for Agents.
- Administer Call Vectoring.
- Administer H.323 Channels for Experience Portal.
 - Administer Hunt Group
 - Administer Stations
 - Administer Agent IDs

Note: Configuration for call routing to/from PSTN was pre-configured and is standard in nature. As such, it is not included in this document. Please refer to documentation in **References** section for additional information.

5.1. Administer Hunt Group

This section provides the Hunt Group configuration for the H.323 channels needed for Communication Manager to communicate with Experience Portal. Virtual Agents will auto log into Hunt Group 75 configured below. Provide a descriptive name and set the **Group Extension** field to a valid extension. Enable the **ACD**, **Queue** and **Vector** options. This hunt group will be specified in the **Agent LoginIDs** configured in **Section 5.2**. Calls are routed to Experience Portal, by the use of this hunt group, as per the configuration in **Section 5.4**.

add hunt-group 75		Page 1 of 4
HUNT GROUP		
Group Number: 75	ACD? y	
Group Name: Voice Portal	Queue? y	
Group Extension: 51112	Vector? y	
Group Type: ucd-mia		
TN: 1		
COR: 1	MM Early Answer? n	
Security Code:	Local Agent Preference? n	
ISDN/SIP Caller Display: grp-name		
Queue Limit: unlimited		
Calls Warning Threshold:	Port:	
Time Warning Threshold:	Port:	

One Page 2, enable **Skill** and **AAS**.

add hunt-group 75		Page 2 of 4
HUNT GROUP		
Skill? y	Expected Call Handling Time (sec): 180	
AAS? y		
Measured: none		
Supervisor Extension:		
Controlling Adjunct: none		
Multiple Call Handling: none		
Timed ACW Interval (sec):	After Xfer or Held Call Drops? n	

5.2. Administer Stations

This section provides the Stations that will be configured in Experience Portal as H.323 channels. Add a **Station** extension for each H.323 channel that will be configured on Experience Portal. During the compliance test, 5 stations, 65001 – 65005, were configured. Set the **Type** to **7434ND**, set a **Security Code** and enable **IP SoftPhone**. Note that the Security Code must be exactly same for all the stations configured for Experience Portal connectivity.

add station 65001		Page	1 of	6
STATION				
Extension: 65001	Lock Messages? n	BCC: 0		
Type: 7434ND	Security Code: *	TN: 1		
Port: S00079	Coverage Path 1:	COR: 1		
Name: H.323 VP 1	Coverage Path 2:	COS: 1		
	Hunt-to Station:			
STATION OPTIONS				
	Time of Day Lock Table:			
Loss Group: 2	Personalized Ringing Pattern: 1			
Data Module? n	Message Lamp Ext: 65001			
Display Module? y				
Display Language: english	Coverage Module? n			
Survivable COR: internal	Media Complex Ext:			
Survivable Trunk Dest? y	IP SoftPhone? y			
	Remote Office Phone? n			
	IP Video Softphone? n			
	Short/Prefixed Registration Allowed: default			

5.3. Administer Agent IDs

This section provides the Agent Login IDs for each configured Station above. Add an **Agent Login ID** for each agent used by Experience Portal stations. In this configuration, agent login IDs 6501 - 6502 were created. Enable **AAS**, set **Auto Answer** to **none**, and set the **Port Extension** to each corresponding station extensions configured above (65001 – 65005).

add agent-loginID 6501		Page 1 of 2
AGENT LOGINID		
Login ID: 6501	AAS? y	
Name: VP Agent 1	AUDIX? n	
TN: 1	Check skill TNs to match agent TN? n	
COR: 1		
Coverage Path:	LWC Reception: none	
Security Code:	LWC Log External Calls? n	
Attribute:	AUDIX Name for Messaging:	
Port Extension: 65001	LoginID for ISDN/SIP Display? n	
Auto Answer: none		
AUX Agent Remains in LOA Queue: system	MIA Across Skills: system	
AUX Agent Considered Idle (MIA): system	ACW Agent Considered Idle: system	
Work Mode on Login: system	Aux Work Reason Code Type: system	
	Logout Reason Code Type: system	
	Maximum time agent in ACW before logout (sec): system	
	Forced Agent Logout Time: :	
WARNING: Agent must log in again before changes take effect		

One Page 2, configure the **SN** to the skill configured in **Section 5.1**.

add agent-loginID 6501		Page 2 of 2
AGENT LOGINID		
Direct Agent Skill:	Service Objective? n	
Call Handling Preference: skill-level	Local Call Preference? n	
SN RL SL	SN RL SL	
1: 75 1	16:	31: 46:
2:	17:	32: 47:
3:	18:	33: 48:
4:	19:	34: 49:
5:	20:	35: 50:
6:	21:	36: 51:
7:	22:	37: 52:
8:	23:	38: 53:
9:	24:	39: 54:
10:	25:	40: 55:
11:	26:	41: 56:
12:	27:	42: 57:
13:	28:	43: 58:
14:	29:	44: 59:
15:	30:	45: 60:

5.4. Administer Call Vectoring

This section describes the procedures for configuring call vectoring routing calls to Experience Portal.

Configure the **Vector Directory Number** (VDN) that will handle incoming customer calls that route to Experience Portal. The VDN invokes a vector that will route calls to Experience Portal. In this example, VDN 22003 and vector 3 were used for inbound calls that route to Experience Portal. This VDN can be configured as a **Return Destination** for another VDN that is used in the contact center for queuing and answering calls.

add vdn 22003	Page 1 of 3
VECTOR DIRECTORY NUMBER	
Extension: 22003	
Name*: VDN 3	
Destination: Vector Number	3
Attendant Vectoring? n	
Meet-me Conferencing? n	
Allow VDN Override? y	
COR: 1	
TN*: 1	
Measured: both	Report Adjunct Calls as
ACD*? n	
Acceptable Service Level (sec): 20	
VDN of Origin Annc. Extension*:	
1st Skill*:	
2nd Skill*:	
3rd Skill*:	
SIP URI:	
* Follows VDN Override Rules	

Vector 3 queues the call to the split (skill 75), which routes the call to Experience Portal via H.323 channels.

change vector 3	Page 1 of 6
CALL VECTOR	
Number: 3	Name: Intradial Vector 3
Multimedia? n	Attendant Vectoring? n Meet-me Conf? n Lock?
Basic? y	EAS? y G3V4 Enhanced? y ANI/II-Digits? y ASAI Routing?
Prompting? y	LAI? y G3V4 Adv Route? y CINFO? y BSR? y Holidays? y
Variables? y	3.0 Enhanced? y
01 wait-time	2 secs hearing ringback
02 queue-to	skill 75 pri m
03 wait-time	30 secs hearing ringback
04 goto step	2 if unconditionally
05 stop	

6. Configure Avaya Aura® Experience Portal

Experience Portal is configured via the Experience Portal Manager (EPM) web interface, to access the web interface, enter `http://ip-address/` as the URL in a web browser, where “ip-address” is the IP address of Experience Portal. Log in using the appropriate credentials.



Note: Some of the screens in this section are shown after the Experience Portal had been configured. Don't forget to save the screen parameters as you configure Experience Portal.

6.1. Administer VoIP Connection

On the left pane, click on the **VoIP Connections** under **System Configuration** (not shown). To add an **H.323 Connection**, click on **H.323** tab on **VoIP Connections** page (not shown). Fill in **Name**, in the **Gatekeeper Address** and **Gatekeeper Port**, type in the IP Address of Communication Manager and default port of **1719**, respectively. Under **New Stations** section, type in the range of stations, as configured in **Section 5.2**, in **From** and **To** fields; type in the **Password** as configured in **Section 5.2**. Select **Inbound and Outbound** for **Station Type**, and select **Add**. Click **Save** to save changes.

AVAYA Welcome, epadmin
Last logged in today at 10:29:43 AM PDT

Avaya Aura® Experience Portal 7.2.1 (ExperiencePortal) Home Help Logoff

Expand All Collapse All

You are here: [Home](#) > [System Configuration](#) > [VoIP Connections](#) > [Change H.323 Connection](#)

Change H.323 Connection

Use this page to change the configuration of an H.323 connection.

Name: ACM

Enable: ☒ Yes ☐ No

Gatekeeper Address: 10.64.110.10

Alternative Gatekeeper Address:

Gatekeeper Port: 1719

Media Encryption: ☐ Yes ☒ No

New Stations

From To

Station: Password:

☒ Same Password
☐ Use sequential passwords

Station Type: Inbound and Outbound Inbound Only Maintenance Add

Configured Stations (M for Maintenance, I for Inbound Only)

65001 - 65005 Remove

Save Apply Cancel Help

6.2. Configure iAssist CSM Applications

Two applications are configured in Experience Portal; one for inbound callers to access the survey provided by CSM and another for outbound calls placed to customers to survey provided by CSM. Inbound CSM application can be offered to callers' right after speaking with contact center agents. Alternatively, Outbound CSM application can be used to manually place calls to customers after the calls to contact center agents have been completed.

In the **Applications** page, add an Experience Portal application to handle incoming calls. This application will provide the caller the survey options. Configure the application as shown below.

Note that the **Called Number** configured is the inbound VDN Extension as configured in **Section 5.4**. Following shows the inbound application configured during the compliance testing.

AVAYA Welcome, epadrn
Last logged in today at 9:24:29 AM F

Avaya Aura® Experience Portal 7.2.1 (ExperiencePortal) Home ? Help Logoff

Expand All | Collapse All

- ▼ **User Management**
 - Roles
 - Users
 - Login Options
- ▼ **Real-time Monitoring**
 - System Monitor
 - Active Calls
 - Port Distribution
- ▼ **System Maintenance**
 - Audit Log Viewer
 - Trace Viewer
 - Log Viewer
 - Alarm Manager
- ▼ **System Management**
 - EPM Manager
 - MPP Manager
 - Software Upgrade
 - System Backup
- ▼ **System Configuration**
 - Applications
 - EPM Servers
 - MPP Servers
 - SNMP
 - Speech Servers
 - VoIP Connections
 - Zones
- ▼ **Security**
 - Certificates
 - Licensing
- ▼ **Reports**
 - Standard
 - Custom
 - Scheduled
- ▼ **Multi-Media Configuration**
 - Email
 - HTML
 - SMS

You are here: [Home](#) > [System Configuration](#) > [Applications](#) > Change Application

Change Application

Use this page to change the configuration of an application.

Name: iAssist_Inbound_CSM

Enable: ☒ Yes ☐ No

Type: VoiceXML

Reserved SIP Calls: ☒ None ☐ Minimum ☐ Maximum

Requested:

URI

☒ Single ☐ Fail Over ☐ Load Balance

VoiceXML URL: **Verify**

Mutual Certificate Authentication: ☐ Yes ☒ No

Basic Authentication: ☐ Yes ☒ No

Speech Servers

ASR:

TTS:

Application Launch

☒ Inbound ☐ Inbound Default ☐ Outbound

☒ Number ☐ Number Range ☐ URI

Called Number: **Add**

Remove

Following shows the outbound application configured during the compliance testing.

The screenshot displays the Avaya Aura Experience Portal 7.2.1 (ExperiencePortal) interface. The top navigation bar includes the Avaya logo, a 'Last logged' status indicator, and a breadcrumb trail: 'You are here: Home > System Configuration > Applications > Change Application'. The left sidebar contains a tree view with categories: User Management, Real-time Monitoring, System Maintenance, System Management, System Configuration, Security, Reports, and Multi-Media Configuration. The main content area is titled 'Change Application' and includes a description: 'Use this page to change the configuration of an application.' The configuration fields are as follows:

- Name: CSM_Outbound
- Enable: ☒ Yes ☐ No
- Type: CCXML (dropdown)
- Reserved SIP Calls: ☒ None ☐ Minimum ☐ Maximum
- Requested: (empty text field)
- URI:
 - ☒ Single ☐ Fail Over ☐ Load Balance
 - CCXML URL: http://10.64.110.177:8080/iAssistOutboundCSM/ccxml/start.jsp (with a 'Verify' button)
- Mutual Certificate Authentication: ☐ Yes ☒ No
- Basic Authentication: ☐ Yes ☒ No
- Speech Servers:
 - ASR: No ASR (dropdown)
 - TTS: No TTS (dropdown)
- Application Launch:
 - ☐ Inbound ☐ Inbound Default ☒ Outbound
- Speech Parameters (expandable section)
- Reporting Parameters (expandable section)
- Advanced Parameters (expandable section)

At the bottom of the form are four buttons: 'Save', 'Apply', 'Cancel', and 'Help'.

6.3. Configure the Outcall Authentication

Configure the Outcall User Name and Password that will be sent by CSM Outbound application to initiate a call to customers for surveys provided by CSM. Click on **EPM Servers** in the left pane, in the resulting page, click on **EPM Settings** to display the page below. Under the **Outcall** section, configure the **User Name** and **Password** used by CBM when it makes an outcall request to Experience Portal.

AVAYA Welcome, epadmin
Last logged in today at 10:29:43 AM PDT

Avaya Aura® Experience Portal 7.2.1 (ExperiencePortal) Home ? Help Logoff

Expand All | Collapse All

User Management
Roles
Users
Login Options

Real-time Monitoring
System Monitor
Active Calls
Port Distribution

System Maintenance
Audit Log Viewer
Trace Viewer
Log Viewer
Alarm Manager

System Management
EPM Manager
MPP Manager
Software Upgrade
System Backup

System Configuration
Applications
EPM Servers
MPP Servers
SNMP
Speech Servers
VoIP Connections
Zones

Security
Certificates
Licensing

Reports
Standard
Custom
Scheduled

Multi-Media Configuration
Email
HTML
SMS

You are here: [Home](#) > [System Configuration](#) > [EPM Servers](#) > [EPM Settings](#)

EPM Settings

Use this page to configure system parameters that affect the Experience Portal system.

Experience Portal Name:

Number of Application Server Failover Logs:

Commands to Retain in Configuration History:

Resource Alerting Thresholds (%)

HTML Units:

Disk: **High Water** **Low Water**

Web Service Authentication

Application Reporting

User Name:

Password:

Verify Password:

Outcall

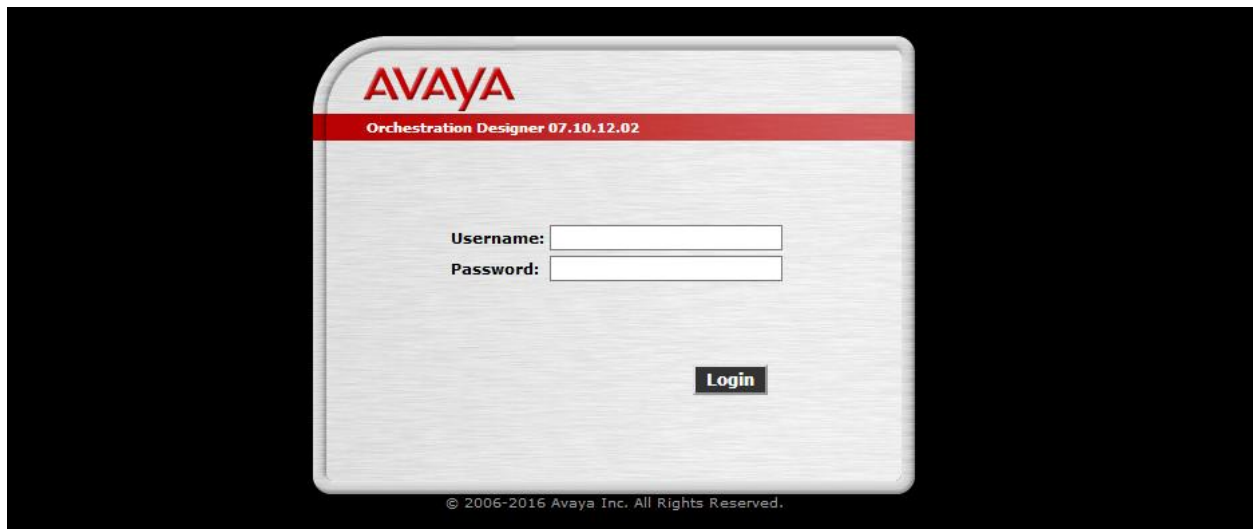
User Name:

Password:

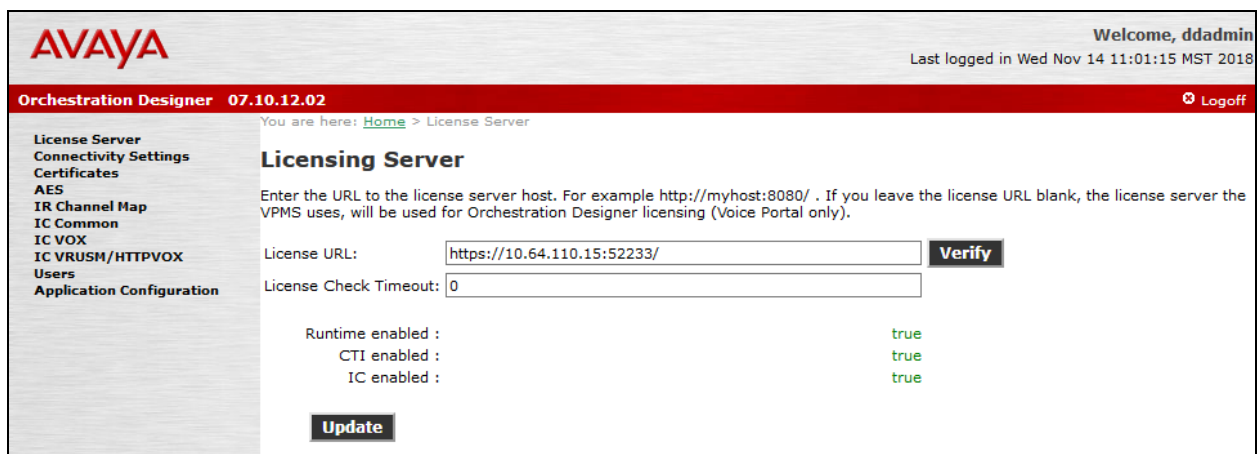
Verify Password:

6.4. Configure Avaya Aura® Orchestration Designer

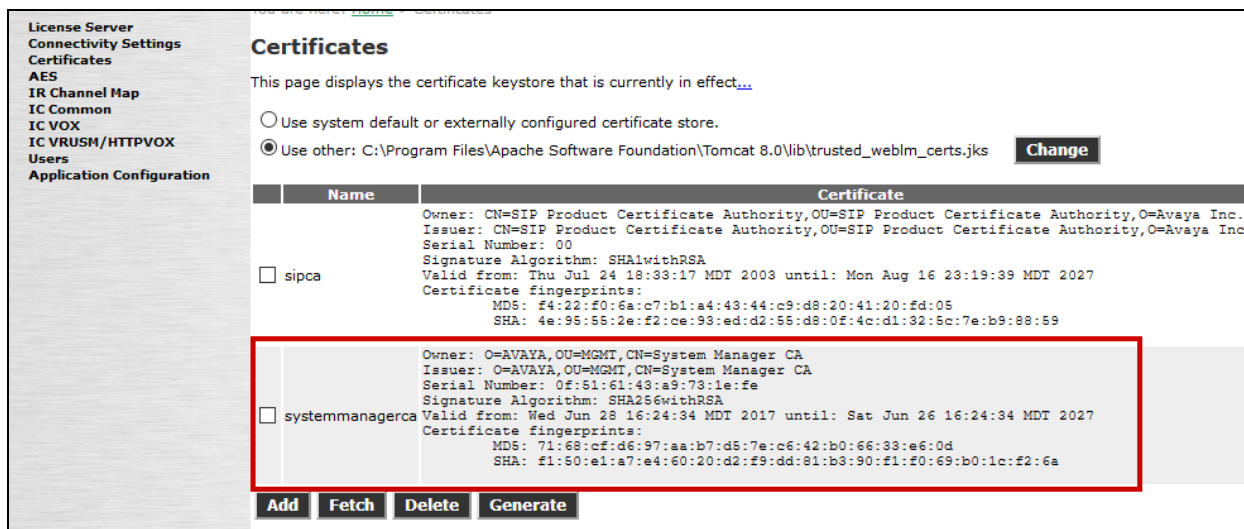
iAssist Admin server hosted the runtimeconfig and aesconnector connectors. Access the runtimeconfig via a web browser and log on using appropriate credentials.



On the left pane, select **License Server** and configured the URL for WebLM server that is hosting the licenses. Select **Verify** to ensure that licenses are retrieved.



On the left pane, select **Certificates** and update the root certificate of the certificate authority that is used for signing certificates, for secure connectivity, in the lab environment. During compliance test, Avaya Aura® System Manager was used as the Certificate Authority. System Manager root certificate was added as shown below.



On the left pane, select **AES** to configure AES connectivity. Configure the AES parameters as per **Section 7**. Select **Add Tserver/AES** once done.

Name: A unique name to identify this entry. The tserver and failover names cannot contain '*'.

Service Name: Identifies the service provider in the format: vendor#switch#type#server.

User Name: Username to connect to this tserver/AES.

Password: Unencrypted password to connect to this tserver/AES.

Confirm Password: Confirm password must match password.

Add TServer/AES

Note: You will need to restart the AES Connector for changes to take affect. You will also need to modify tsapi.pro that is included with your runtimesupport files before connecting to a TServer/AES. Please read Orchestration Designer documentation for correct location to place this file.

Once AES Connector has been added, select **map** under **Ext map**.

AES Connector

Timeout:

Time in ms to wait for TServer/AES to obtain the call.
Do not end the input with 'ms'.

Trace Verbosity:

Amount of debug output: 0-off - 3 full.

Update

<input type="checkbox"/>	Type	Name	Service Name	User Name	Ext Map	Add Failover
<input type="checkbox"/>	tserver/AES	iAssist	AVAYA#CM15014#CSTA#AES15019	acqueon	map	add failover

Delete

Add the H.323 Channels (Extensions) that were added in **Section 5.2**.

Tserver Extension Map

Extension Map for Tserver : [iAssist](#)

<input type="checkbox"/>	Channel	Mapped Extension	Observe On Startup
<input type="checkbox"/>	65001	65001	true
<input type="checkbox"/>	65002	65002	true
<input type="checkbox"/>	65003	65003	true
<input type="checkbox"/>	65004	65004	true
<input type="checkbox"/>	65005	65005	true

Delete

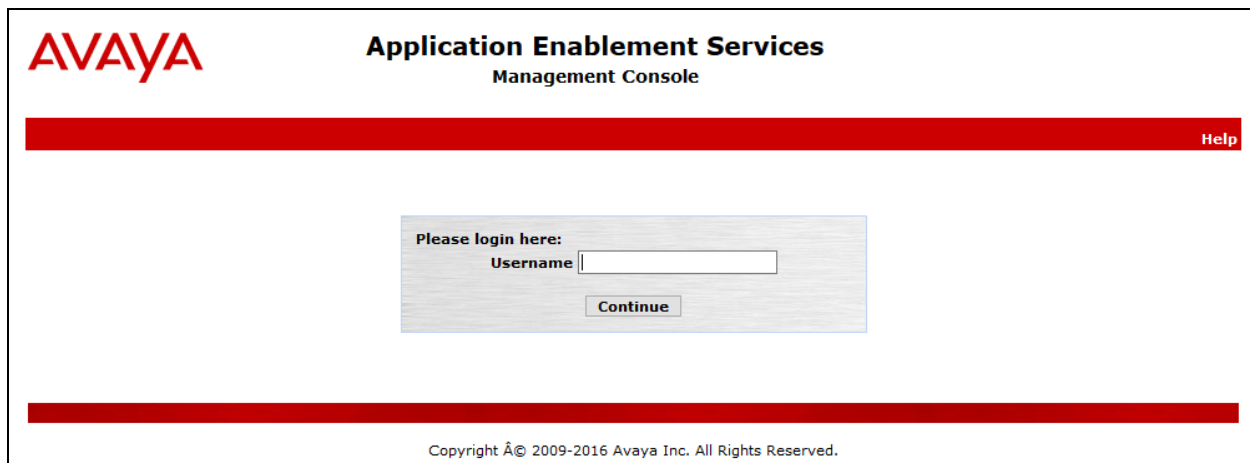
7. Configure Avaya Aura® Application Enablement Services

This section provides the procedures for configuring AES. Switch connection and TSAPI configuration for connectivity to Communication Manager was preconfigured and standard in nature; thus, not mentioned in this document.

iAssist Admin server connected to AES via TSAPI to monitor stations configured on Communication Manager. This includes:

- Administer User
- Obtain Tlink

Access the AES OAM web interface by using the URL “https://ip-address” in a web browser, where “ip-address” is the IP address of AES. Log on using appropriate credentials.



The screenshot displays the Avaya Application Enablement Services (AES) Management Console login interface. At the top left is the Avaya logo, and to its right is the title "Application Enablement Services Management Console". A red horizontal bar spans the width of the page, with a "Help" link on the right. In the center, a light gray box contains the text "Please login here:" followed by a "Username" label and a text input field. Below the input field is a "Continue" button. Another red horizontal bar is located at the bottom of the page, above the copyright notice: "Copyright © 2009-2016 Avaya Inc. All Rights Reserved."

7.1. Administer User

Once logged on, navigate to **User Management** → **User Admin** → **Add User**. Screen capture below depicts the user configured during the compliance test. Note that **CT User** is set to **Yes**.

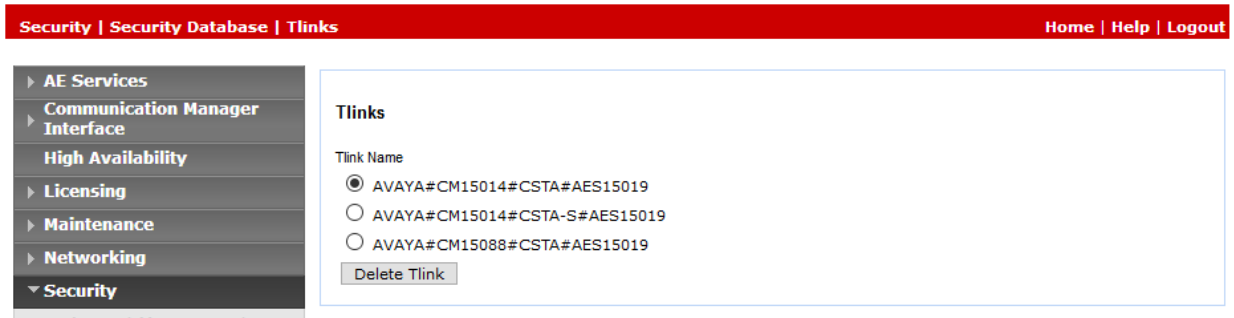
The screenshot shows the Avaya Application Enablement Services Management Console. The top navigation bar includes the Avaya logo, the title 'Application Enablement Services Management Console', and a welcome message. The left sidebar contains a tree view with categories like AE Services, Communication Manager Interface, High Availability, Licensing, Maintenance, Networking, Security, and Status. The 'User Management' category is expanded, showing 'Service Admin' and 'User Admin'. The 'User Admin' category is further expanded, showing 'Add User', 'Change User Password', 'List All Users', 'Modify Default Users', and 'Search Users'. The main content area displays the 'Edit User' form for a user named 'acqueon'. The form includes fields for User Id, Common Name, Surname, Password, Confirm Password, Admin Note, Avaya Role (set to None), Business Category, Car License, CM Home, CSS Home, CT User (set to Yes), Department Number, Display Name, and Employee Number.

Navigate to **Security** → **Security Database** → **CTI Users** → **List All Users**, and edit the user added above; check box for **Unrestricted Access**.

The screenshot shows the Avaya Application Enablement Services Management Console, specifically the 'Edit CTI User' form. The top navigation bar includes the Avaya logo, the title 'Application Enablement Services Management Console', and a welcome message. The left sidebar contains a tree view with categories like AE Services, Communication Manager Interface, High Availability, Licensing, Maintenance, Networking, Security, and Status. The 'Security' category is expanded, showing 'Account Management', 'Audit', 'Certificate Management', 'Enterprise Directory', 'Host AA', 'PAM', and 'Security Database'. The 'Security Database' category is further expanded, showing 'Control'. The main content area displays the 'Edit CTI User' form for a user named 'acqueon'. The form includes fields for User Profile (User ID, Common Name, Worktop Name, Unrestricted Access), Call and Device Control (Call Origination/Termination and Device Status), Call and Device Monitoring (Device Monitoring, Calls On A Device Monitoring, Call Monitoring), and Routing Control (Allow Routing on Listed Devices). The 'Unrestricted Access' checkbox is checked. The 'Call and Device Control' dropdown is set to 'None'. The 'Call and Device Monitoring' dropdown is set to 'None'. The 'Routing Control' dropdown is set to 'None'. The form also includes 'Apply Changes' and 'Cancel Changes' buttons.

7.2. Obtain Tlink

Obtain the Tlink that will be used by iAssist Admin server to connect to AES. Navigate to **Security → Security Database → Tlinks** and note the Tlink.

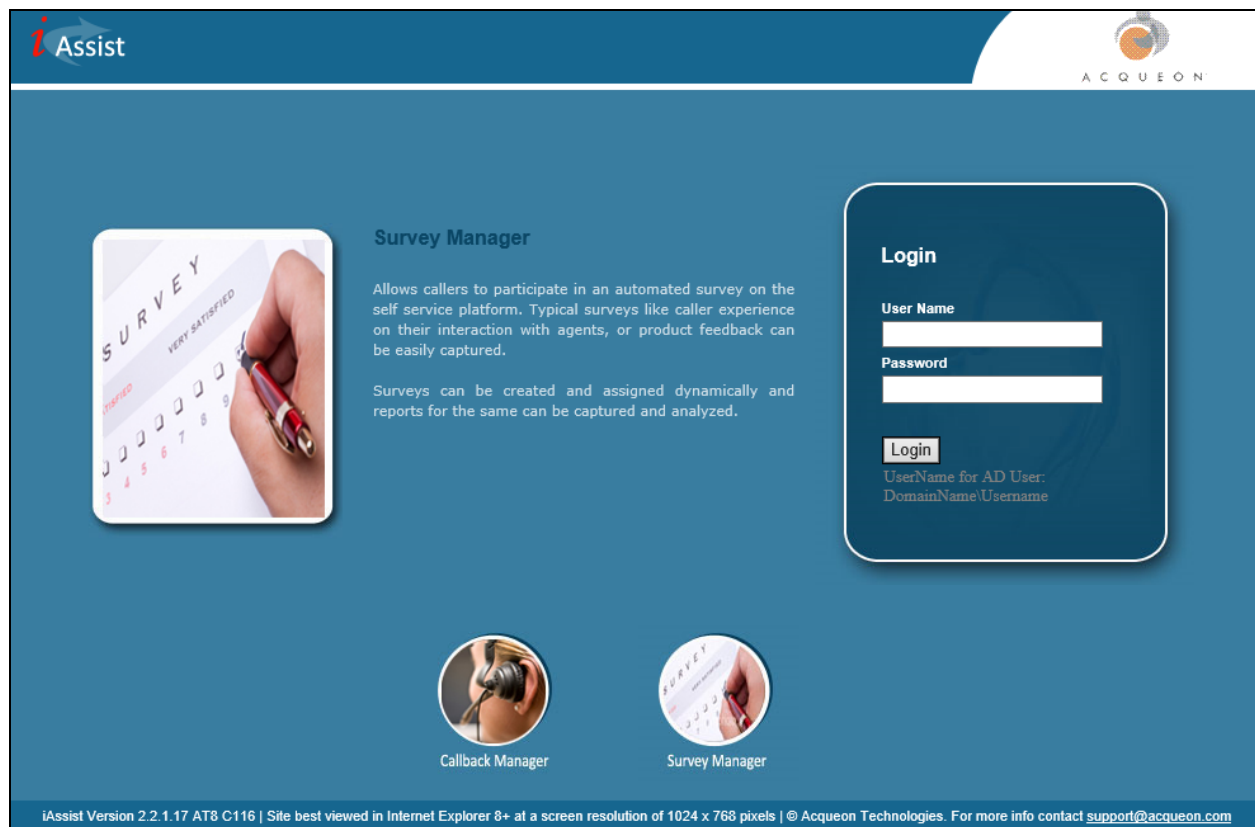


The screenshot shows the iAssist Admin web interface. At the top, a red navigation bar contains the text "Security | Security Database | Tlinks" on the left and "Home | Help | Logout" on the right. On the left side, there is a vertical menu with several options: "AE Services", "Communication Manager Interface", "High Availability", "Licensing", "Maintenance", "Networking", and "Security". The "Security" option is currently selected and highlighted. The main content area on the right is titled "Tlinks". Below this title, it says "Tlink Name" followed by three radio button options: "AVAYA#CM15014#CSTA#AES15019" (which is selected), "AVAYA#CM15014#CSTA-S#AES15019", and "AVAYA#CM15088#CSTA#AES15019". At the bottom of this section is a button labeled "Delete Tlink".

8. Configure Acqueon iAssist Call Survey Manager

This section provides the procedures for configuring CSM via the iAssist Admin web console. Access the iAssist Admin web console by using the URL “https://ip-address” in a web browser, where “ip-address” is the IP address of iAssist server. Log on using appropriate credentials.

Note: The current version of Acqueon iAssist Call Survey Manager only supports Microsoft Internet Explorer.



Survey Manager

Allows callers to participate in an automated survey on the self service platform. Typical surveys like caller experience on their interaction with agents, or product feedback can be easily captured.

Surveys can be created and assigned dynamically and reports for the same can be captured and analyzed.

Login

User Name

Password

Login

UserName for AD User:
DomainName\Username

Callback Manager

Survey Manager

iAssist Version 2.2.1.17 AT8 C116 | Site best viewed in Internet Explorer 8+ at a screen resolution of 1024 x 768 pixels | © Acqueon Technologies. For more info contact support@acqueon.com

8.1. Add a Business group

Business Group refers to the type of business the application caters. Each business group will have a language and a unique number where the call will be routed to so that the application can identify the caller.

Business Group Management enables configuration and management of a business group. Use the **Business Group** option under the **General** tab to add, modify or delete a business group.

- Enter a valid **Business Group Name**.
- Set the **Incoming Number** to the inbound VDN extension number configured in **Section 5.4**.
- Select a pre-configured **Site** to from the dropdown menu to associate the business group to a site.
- Select an appropriate **Language**.
- Select a pre-configured **IVR Configuration Template**.

The screenshot displays the 'iAssist' web application interface. The top navigation bar includes 'Home', 'Manage', 'General', 'CBM', 'CSM', and 'License'. The user is logged in as 'admin' and can click 'Logout'. The main content area is titled 'Business Group Management' and contains a form with the following fields:

- Business Group Name ***: CSM Business Group (marked as mandatory)
- Incoming Number ***: 22003 (marked as mandatory)
- Site**: DevConnect Site (dropdown menu)
- Language**: US English (dropdown menu)
- IVR Configuration Template**: DEFAULT_CSM_CONFIG (dropdown menu)

At the bottom of the form are 'Update Business Group' and 'Cancel' buttons. To the right, under 'Defined Business Group(s)', a table lists existing groups:

Business Group	Edit	Delete
CBM Business Group		
CSM Business Group		

8.2. Configure Business Group

Access the **Business Group Configuration** option from the **CSM** tab. Click the **Edit** icon of the Business Group configured above under the **Defined Business Group(s)** displayed in the right pane. The Business Group Name will be populated automatically.

- Enter a **Business Group Name**.
- Enter **IVR IP Address**, which is the IP Address of Experience Portal EPM.
- Enter the **Customer Timeout** in seconds.

iAssist ACQUEON

Home Manage General CBM CSM License Welcome admin | Logout

CSM - Business Group Configurations [CSM Business Group]

Mandatory

Business Group Name	CSM Business Group
IVR IP address *	10.64.110.50
Customer Timeout*	30

Defined Business Group(s)

Business Group	Edit
CSM Business Group	

8.3. Business Hours and Break Hours

Continuing from above, select the **Business Hour and Break Hour** option. It should be entered in the 24-hour format, the break hour is an interval within the business hours, for example, lunch break. Business hours and break hours should be configured for each day of the week separately as shown. Following was configured during the compliance test.

Business Hour and Break Hour

	Business Hour [24 Hrs Format]		Break Hour [24 Hrs Format]	
Monday	09:00	18:00	00:00	00:00
Tuesday	09:00	18:00	00:00	00:00
Wednesday	09:00	18:00	00:00	00:00
Thursday	00:00	18:00	00:00	00:00
Friday	09:00	18:00	00:00	00:00
Saturday	09:00	18:00	00:00	00:00
Sunday	09:00	18:00	00:00	00:00

Defined Business Group(s)


Business Group	Edit
CSM Business Group	

8.4. Config Options

Continuing from above, select the **Config Options** option; the description of the outcome, its reschedule value and number of retries are given:

- Enter the desired rescheduled value in minutes under the **Rescheduled Value** field.
- Enter **Number Of Retries** to be made against the outcomes. (By default the value will be 3 retries).
- Select the **Leave Message** option to leave a message if the call is forwarded to voice mail.
- Select the **Close if Answering Machine** box if the call is diverted to the answering machine. By enabling this option, the contact will be closed without further retries

CSM - Email Configuration		
Holiday		
Config Options		
Outcome Description	Reschedule Value	Number Of Retries
Busy *	<input type="text" value="30"/>	<input type="text" value="3"/>
Not Reachable *	<input type="text" value="30"/>	<input type="text" value="3"/>
No Response *	<input type="text" value="30"/>	<input type="text" value="3"/>
Default *	<input type="text" value="30"/>	<input type="text" value="3"/>
Maximum Retries *	<input type="text" value="3"/>	
	<input checked="" type="checkbox"/> Leave Message	<input checked="" type="checkbox"/> Close if Answering Machine

Business Group	Edit
CSM Business Group	

8.5. Create a Call Survey

To configure a the survey, select **Survey** from the **CSM** tab. Under the **Create New Survey** section:

- Enter a **Survey Name**.
- Select a **Survey Type** from the dropdown menu.
- Select a **Business GroupName**, from **Section 7.2** to handle the survey from the dropdown menu.
- Enter the **Active Start Time** in MM/DD/YYYY HH:MM:SS format. This is the survey start time.
- Enter the **Active End Time** in MM/DD/YYYY HH:MM:SS format. This is the survey end time.

Generally, there are two types of surveys that can be configured in CSM.

- An IVR Survey is a survey of a product, a service, an issue, etc.
- An Agent Survey is an assessment of the performance of an agent attending a customer call.

However, at any given time, only one survey can be hosted for one business group

The screenshot shows the 'Assist' web application interface. The top navigation bar includes 'Home', 'Manage', 'General', 'CBM', 'CSM', and 'License'. The user is logged in as 'admin' and can click 'Logout'. The main content area is divided into two sections: 'Create New Survey' and 'Defined Survey(s)'.

Create New Survey

*** Mandatory**

Survey Name *	AgentSurvey
Survey Type *	AgentSurvey
Business GroupName *	CSM Business Gro
Active Start Date (MM/DD/YYYY) *	7/21/2018
Active End Date (MM/DD/YYYY) *	8/31/2018

Update Survey Cancel

Defined Survey(s)

Survey	BusinessGroup	Edit	Delete
AgentSurvey	CSM Business Group		

8.6. Create Survey Questions

- Enter a name for the question in the **Question** field.
- Enter the audio file name of the question in the **Question File Name** field. This is the file that will be played out to the caller as a question.
- Select the **Question Type** from the dropdown menu. There are four Question Types available for selection:

Yes/ No – The answer to this question can only be Yes or No, to be selected by the caller by pressing appropriate keys as prompted.

Choice – The answer to this question will be played out as multiple choices, to be selected by the caller by pressing the appropriate keys as prompted. Select the number of choices to be offered to the caller from the dropdown menu along side the Question type dropdown menu. The minimum number of Choices offered to the caller is 3 and the maximum number is 5.

Number – The answer to this question will be a number. The caller has to press the appropriate number on the telephone keypad. Enter the Minimum Digits and Maximum Digits fields to complete selection of this type of question.

Date – The answer to this question will be date. The caller has to press the appropriate numbers on the telephone keypad in the format as prompted by the application. Select the date format as MM/DD/YYYY or DD/MM/YYYY from the dropdown alongside the Question Type menu.

The screenshot displays the iAssist application interface. The top navigation bar includes the iAssist logo, a menu with 'Home', 'Manage', 'General', 'CBM', 'CSM', and 'License', and a user status area showing 'Welcome admin | Logout'. The main content area is divided into two panels. The left panel, titled 'Create Survey Questions', contains a form with three fields: 'Question' (with a red asterisk and 'Mandatory' label), 'Question File Name' (with a red asterisk), and 'Question Type' (with a red asterisk). The 'Question' field contains 'question1', 'Question File Name' contains 'question1.wav', and 'Question Type' is set to 'YesNo'. Below the fields are 'Update Survey Question' and 'Cancel' buttons. The right panel, titled 'Defined Survey Question(s)', contains a table with three columns: 'Questions', 'Edit', and 'Delete'. The table lists six questions: 'CSE_Knowledge', 'CSE_Professionalism', 'Issue_Resolved_Timely', 'question1', 'question10', and 'question2'. Each row has an 'Edit' icon (a pencil) and a 'Delete' icon (an 'X').

Questions	Edit	Delete
CSE_Knowledge		
CSE_Professionalism		
Issue_Resolved_Timely		
question1		
question10		
question2		

8.7. Select Questions

To select the Survey Questions configured for a survey, select **Select Questions** from the **CSM** tab. A number of survey questions are included in the application. However, all survey questions need not be part of a specific survey; some survey questions may be skipped. The survey questions for a specific survey can be selected. This will result in only the selected survey questions being played out to the caller; the other questions are simply ignored by the application.

Using this menu you can do the following:

- Select various questions for the survey.
- Arrange the questions in the desired sequence.
- Dynamic routing of the questions, and Enabling/disabling record option for each question

The screenshot displays the 'iAssist' application interface. The top navigation bar includes 'Home', 'Manage', 'General', 'CBM', 'CSM', and 'License'. The 'CSM' tab is active. The main content area is titled 'Select Questions' and contains a section for 'AgentSurvey' with a table of questions. To the right, there is a 'Defined Survey(s)' section with a table showing the mapping of questions to surveys.

Select	Question	Question Type	Allow recording
<input checked="" type="checkbox"/>	CSE_Knowledge	Choice	<input type="checkbox"/>
<input checked="" type="checkbox"/>	CSE_Professionalism	Choice	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/>	Issue_Resolved_Timely	Yes/No	<input type="checkbox"/>
<input type="checkbox"/>	question1	Yes/No	<input type="checkbox"/>
<input type="checkbox"/>	question10	Number	<input type="checkbox"/>
<input type="checkbox"/>	question2	Yes/No	<input type="checkbox"/>
<input type="checkbox"/>	question3	Yes/No	<input type="checkbox"/>
<input type="checkbox"/>	question4	Yes/No	<input type="checkbox"/>
<input type="checkbox"/>	question5	Yes/No	<input type="checkbox"/>

Buttons at the bottom: < Back, Next >, Finish >>, Cancel

Survey	Edit	Remove Mapping
AgentSurvey		

8.8. Call Flow Generating

Select the **CallFlow Generator** option under the **General tab**. Under this section, call flows are generated for a business group or business group collection. During the compliance test, the following was created for CSM Inbound application.

The screenshot shows the iAssist web application interface. The top navigation bar includes 'Home', 'Manage', 'General', 'CBM', 'CSM', and 'License'. The user is logged in as 'admin' and can click 'Logout'. The main content area is titled 'Call Flow Generator' and contains a form with the following fields:

- CallFlow Name ***: CSM_Inbound
- Site ***: DevConnect Site (dropdown)
- Appilication**: CSM - Inbound (dropdown)
- Filter Type ***: ☐ By Business Group Collection, ☒ By BusinessGroupID
- Business Group ***: ☒ CSM Business Group (checkbox list)
- Business Group ***: ☐ Select All

A red asterisk and the word 'Mandatory' are displayed next to the 'CallFlow Name' field. To the right, the 'Defined CallFlow(s)' section shows a table with three columns: 'CallFlow', 'Edit', and 'Delete'.

CallFlow	Edit	Delete
CBM_Inbound		
CBM_Outbound		
CSM_Inbound		

Following was created for CSM Outbound application.

The screenshot shows the iAssist web application interface. The top navigation bar includes 'Home', 'Manage', 'General', 'CBM', 'CSM', and 'License'. The user is logged in as 'admin' and can click 'Logout'. The main content area is titled 'Call Flow Generator' and contains a form with the following fields:

- CallFlow Name ***: Outbound
- Site ***: DevConnect Site (dropdown)
- Appilication**: CSM - Outbound (dropdown)
- Filter Type ***: ☐ By Business Group Collection, ☒ By BusinessGroupID
- Business Group ***: ☒ CSM Business Group (checkbox list)
- Business Group ***: ☐ Select All

A red asterisk and the word 'Mandatory' are displayed next to the 'CallFlow Name' field. To the right, the 'Defined CallFlow(s)' section shows a table with three columns: 'CallFlow', 'Edit', and 'Delete'.

CallFlow	Edit	Delete
CBM_Inbound		
CBM_Outbound		
CSM_Inbound		
Outbound		

8.9. Upload Contacts for Outbound Calls

Select the **Upload Contacts** option under the **CSM** tab. Outbound calls will be placed to the contacts uploaded here. An **Individual Contact** can be added or multiple contacts via the **Bulk Contacts** options. During the compliance test, the following was used. Once done, select **Uploaded Contacts**. At this point, outbound calls will be placed to customers defined in **Call Survey Number**.

Upload Contacts

*** Mandatory**

Business Group * CSM Business Group

Survey * AgentSurvey [Create Survey](#)

Upload Type * ☐ Individual Contact ☒ Bulk Contacts

Contacts * [Browse...](#)

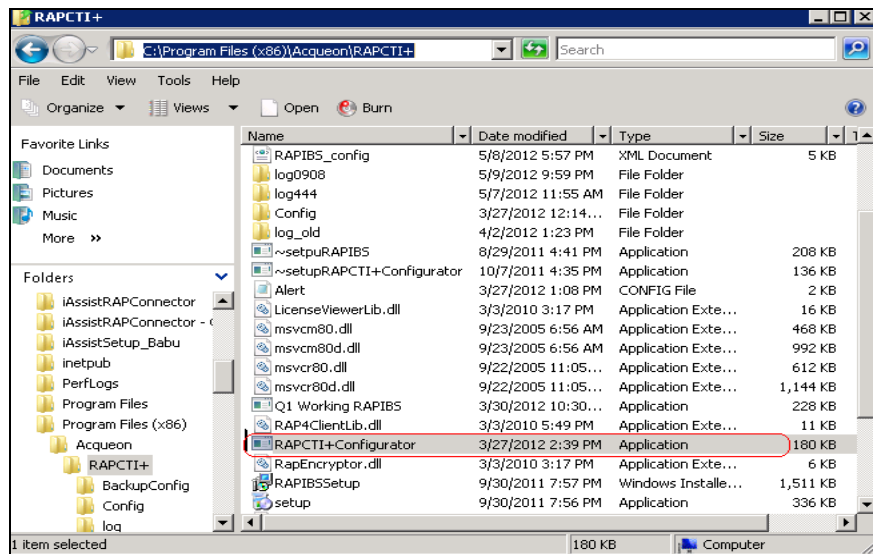
[View Records](#)

SI No	Business Group	Survey	Call Survey Number	Agent ID	Customer ID	Process On
1	CSM Business Group	AgentSurvey	1201551212	55001	1234	10/4/2018 10:50:25 AM

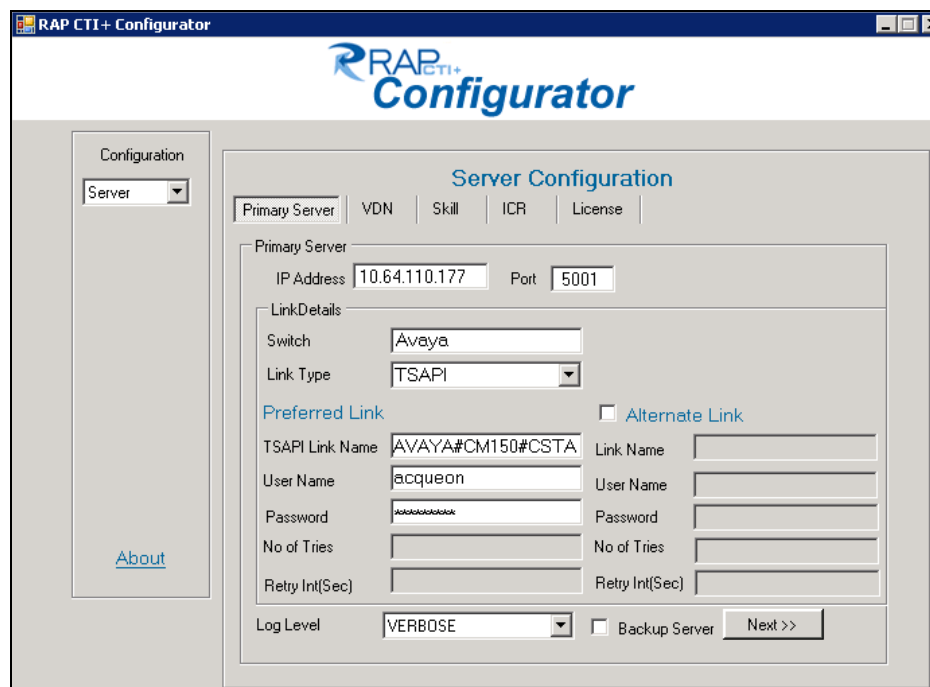
[Upload Contacts](#) [Clear](#)

8.10. Configure RapCTI

On the iAssist Admin server, open RAPCTI+Configurator from the path (C:\Program Files (x86)\Acqueon\RAPCTI+) to configure the VDN that will be used for monitoring and obtaining the Agent ID. After a call has been completed with an agent, the call is routed to CSM. Along with the call, Agent ID is tagged.



Double click on RAPCTI+Configurator to open the screen below. Under the **Primary Server** tab, configure AES connectivity as per **Section 6**.



Select the **VDN** tab:

- Configure the VDN that was configured used for routing calls to agents, 22001 in this case.
- Select **Originating VDN** from the **VDN Type** drop down list
- Select **Add**.

The screenshot shows the 'RAP CTI+ Configurator' application window. The 'Server Configuration' tab is active, with sub-tabs for 'VDN', 'Skill', 'ICR', and 'License'. The 'VDN Details' section contains the following fields:

- VDN Number:** 22001
- VDN Type:** Originating VDN (selected from a dropdown menu)
- Send VDN as DNIS:** ☐
- Add:** A button to add the VDN.
- Originating VDN:** A list box showing '22001' with a red 'X' icon to its right.
- Route VDN:** An empty list box with a red 'X' icon to its right.
- Failed VDN retry Timer:** 1 (in Minutes)
- Navigation:** '<< Previous' and 'Next >>' buttons.

A red rectangle highlights the 'VDN Number' and 'VDN Type' fields. The 'About' link is visible in the bottom left corner of the configuration panel.

Select **Next** >> 3 times.

The screenshot shows the 'RAP CTI+ Configurator' window with the 'Server Configuration' tab selected. The 'VDN Details' section includes fields for 'VDN Number' (22002), 'VDN Type' (Route VDN), and 'Send VDN as DNIS' (unchecked). Below these are 'Originating VDN' and 'Route VDN' lists, each with an 'Add' button and a red 'X' icon. The 'Failed VDN retry Timer' is set to 1 minute. The 'Next >>' button is highlighted with a red box.

Select **Save** and **Yes** to complete save the configuration.

The screenshot shows the 'RAP CTI+ Configurator' window with the 'Server Configuration' tab selected. A 'Confirm Save' dialog box is open, asking 'Are You Sure to Save RAP Configuration?'. The 'Yes' button in the dialog is highlighted with a red box. In the background, the 'Save' button in the main window is also highlighted with a red box.

9. Verification Steps

This section provides the verification steps that may be performed to verify that Experience Portal can run iAssist CSM applications.

1. From the EPM web interface, verify that the EPM/MPP server is online and running in the **System Monitor** page shown below.

Avaya Aura® Experience Portal 7.2.1 (ExperiencePortal)

You are here: [Home](#) > Real-Time Monitoring > System Monitor

System Monitor (Sep 28, 2018 8:41:51 AM PDT)

This page displays the current state of the local Experience Portal system plus any remote Experience Portal systems that you have configured. For information about the colored alarm symbols, click Help.

Summary ExperiencePortal Details

Last Poll: Sep 28, 2018 8:41:37 AM PDT

Server Name	Type	Mode	State	Config	Call Capacity		Active Calls		Calls Today	Alarms	
					Current	Licensed Maximum	In	Out			
EPM / localMPP	EPM/MPP	Online	Running	OK	5	5	10	0	0	0	✓
Summary					5	5	10		0	0	✓

Help

2. From the EPM web interface, verify that the ports on the MPP server are in-service in the **Port Distribution** page shown below.

Avaya Aura® Experience Portal 7.2.1 (ExperiencePortal)

You are here: [Home](#) > Real-Time Monitoring > [Port Distribution](#) > Port Distribution Report

Port Distribution Report (Sep 28, 2018 8:42:50 AM PDT)

This page displays information about how the telephony resources have been distributed to the MPPs. You configure the telephony resources on the VoIP Connections page.

Total Ports: 5 Last Poll: Sep 28, 2018 8:42:44 AM PDT

Port	Mode	State	Port Group	Protocol	Current Allocation	Base Allocation
65001	Online	In service	ACM	H323	localMPP	
65002	Online	In service	ACM	H323	localMPP	
65003	Online	In service	ACM	H323	localMPP	
65004	Online	In service	ACM	H323	localMPP	
65005	Online	In service	ACM	H323	localMPP	

Help

- Place a call to 4906 which is the number configured for CSM application in Experience Portal. Navigate to **Real-Time Monitoring** → **Active Calls** to check the active calls being handled by Experience Portal.

The screenshot shows the Avaya Aura Experience Portal 7.2.1 (ExperiencePortal) interface. The top navigation bar includes the Avaya logo, a welcome message for 'epadmin', and a 'Last logged in today at 9:41:51 AM PDT' timestamp. The main content area displays the 'Active Calls Report (Sep 28, 2018 10:12:35 AM PDT)'. A sidebar on the left contains a tree view with categories like User Management, Real-time Monitoring, System Maintenance, System Management, and System Configuration. The main report area shows a table of active calls with columns: Port, Port Group, Protocol, Call Type, MPP Server, Start Time, Calling Number/URI, Called Number/URI, Application, ASR Server, and TTS Server. The table shows one active call with the following details:

Port	Port Group	Protocol	Call Type	MPP Server	Start Time	Calling Number/URI	Called Number/URI	Application	ASR Server	TTS Server
65001	ACM	H323	Inbound	localMPP	Sep 28, 2018 10:12:22 AM PDT	tel:2001	tel:22003	iAssist_Inbound_CSM		

The report also indicates 'Total Calls: 1' and 'Last Poll: Sep 28, 2018 10:12:20 AM PDT'. A 'Help' button is visible below the table.

- Via the iAssist Admin console, retrieve the surveys completed by callers or callees by selecting the **Report** options under the **CSM** tab. Verify survey answers are recorded.

The screenshot shows the iAssist Admin console interface. The top navigation bar includes the iAssist logo, a welcome message for 'admin', and a 'Logout' button. The main content area displays the 'Main Report' section, which includes a 'Group Tree' on the left and a 'Main Report' area on the right. The 'Main Report' area shows a 'DETAILED SURVEY REPONSE REPORT' for the period 'From Date : 10/04/2018 12:00:00 AM To Date : 10/04/2018 11:59:59 PM' at the 'Site : DevConnect Site'. The report includes a table of survey responses with columns: S.NO, Question, and Answer. The table shows one survey response with the following details:

S.NO	Question	Answer
1	Satisfy_CSC_Experience	yes
	Issue_Resolved_Timely	no
	CSE_Knowledge	5
	CSE_Professionalism	4

The report also includes a 'Business Group : CSM Business Group' and a 'Survey Name : AgentSurvey'.

10. Conclusion

These Application Notes describe the configuration steps required to integrate the Acqueon iAssist Call Survey Manager application with Avaya Aura® Experience Portal. All feature and serviceability test cases were completed successfully refer to **Section 2.2** for details.

11. Additional References

This section references the Avaya documentation relevant to these Application Notes. The following Avaya product documentation is available at <http://support.avaya.com>.

- [1] Administering Avaya Aura® Communication Manager, Release 7.1.3, Issue 7, May 2018
- [2] Administering and Maintaining Avaya Aura® Application Enablement Services, Release 7.1.3, Issue 5, May 2018

Product Documentation for Acqueon iAssist Survey Manager can be obtained directly from Acqueon.

- [1] Acqueon iAssist Configuration Guide – AVP, Version 2.2, January 2014

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