



Avaya Solution & Interoperability Test Lab

Application Notes for Acqueon iAssist Call Survey Manager with 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 call center or product experience. iAssist Call Survey Manager is used to create, add, preview, modify, and remove surveys.

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 in Westminster, CO.

1. Introduction

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 call center or product experience. iAssist Call Survey Manager is used to create, add, preview, modify, and remove surveys.

iAssist Call Survey Manager (CSM) allows callers to participate in an automated survey on Avaya Aura® Experience Portal. Surveys can be created and assigned dynamically and survey reports can be captured and analyzed. This helps the organization improve quality, customer and employee satisfaction.

CSM 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. Reports can be captured and analyzed.

Another Acqueon related solution is described in *Application Notes for Acqueon iAssist Call Back Manager with Avaya Aura® Experience Portal*.

2. General Test Approach and Test Results

This section describes the interoperability compliance testing used to verify the iAssist Call Survey Manager (CSM) applications with Avaya Aura® 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.

2.1. Interoperability Compliance Testing

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

- Routing incoming calls to Avaya Aura® Experience Portal and running iAssist CSM.
- The ability of the caller to complete the survey successfully.
- Verifying the correct response to invalid entries by the caller.
- Routing outbound calls to PSTN lines via Avaya Aura Communication Manager

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 test cases passed. Avaya Aura® Experience Portal was successful in running the iAssist CSM applications.

2.3. Support

For technical support on the iAssist Call Survey Manager, contact Acqueon via phone, email, or internet.

- **Phone:** +9198403 57893 (or) +1 888 946 6878
- **Email:** support@acqueon.com
- **Web:** <http://acqueon.issuetrak.com>

2.4. Reference Configuration

Figure 1 illustrates the configuration used for testing. In this configuration, Avaya Experience Portal interfaces with Avaya Aura® Communication Manager via H.323. The application server hosted the iAssist CSM application. The Acqueon iAssist Admin server contained the Microsoft SQL database and was also used to configure the iAssist CSM application.

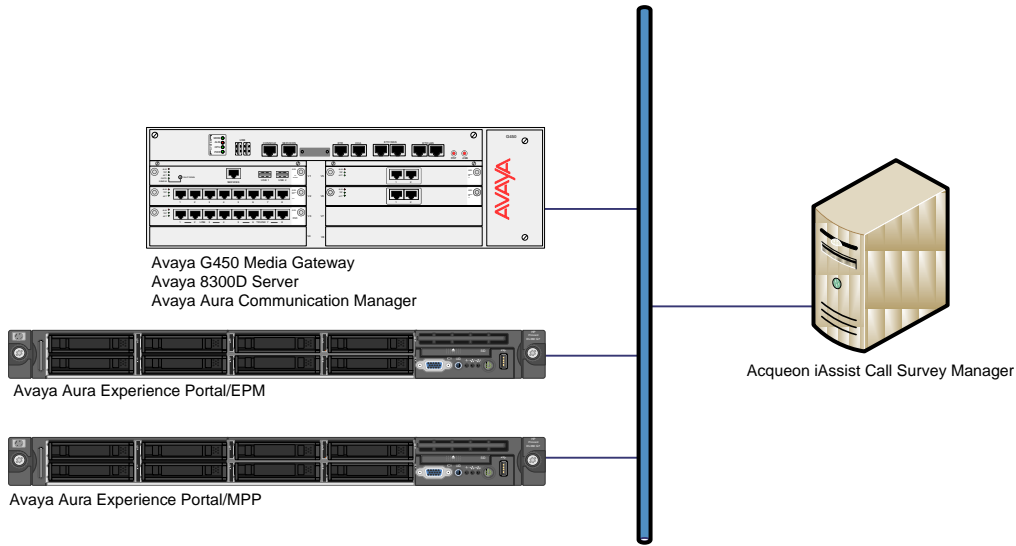


Figure 1: Configuration with Avaya Aura® Experience Portal and Acqueon iAssist

2.5. Equipment and Software Validated

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

Equipment	Software
Avaya Aura® Experience Portal	6.0.2.0.0501
Avaya Aura® Communication Manager running in S8300D server	R016x.02.0.823.0
Acqueon iAssist Call Survey Manager	2.0

3. 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 H.323 Stations for Avaya Aura® Experience Portal

3.1. Administer H.323 Stations for Avaya Aura® Experience Portal

This section describes the configuration of H.323 stations for Avaya Aura® Experience Portal.

From the System Access Terminal (SAT), add an H.323 station for Experience Portal. In the station form, set the **Type** to **7434ND**, provide a descriptive **Name**, set the **Security Code**, and set the **IP Softphone** field to **y**. Repeat this step for each Avaya Aura® Experience Portal station.

```
add station 25501                                     Page 1 of 6
                                                    STATION
Extension: 25501                                     Lock Messages? n          BCC: 0
Type: 7434ND                                         Security Code: 123456     TN: 1
Port: S00002                                         Coverage Path 1:         COR: 1
Name: AAEP Station                                   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: 25501
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
```

4. Configure Avaya Aura® Experience Portal

This section covers the administration of Avaya Aura® Experience Portal. The following Experience Portal configuration steps will be covered:

- Configuring an H.323 VoIP Connection
- Configuring iAssist CSM Application
- Starting the MPP server

Avaya Aura® Experience Portal is configured via the Experience Portal Management (EPM) web interface. To access the web interface, enter `http://<ip-addr>/` as the URL in an internet browser, where `<ip-addr>` is the IP address of the EPM. Log in using the Administrator user role. The screen shown below is displayed.

Note: All 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 Avaya Aura® Experience Portal.

The screenshot shows the Avaya Aura® Experience Portal 6.0 (ExperiencePortal) web interface. The top navigation bar includes the Avaya logo, user information (Welcome, admin), and a navigation menu (Home, Help, Logoff). The main content area displays the 'Avaya Aura® Experience Portal Manager' page, which includes a description of the EPM interface, a license grace period notice, and sections for 'Installed Components' (Media Processing Platform and Proactive Outreach Manager) and 'Legal Notice'.

Avaya Aura® Experience Portal Manager

Avaya Aura® Experience Portal Manager (EPM) is the consolidated web-based application for administering Experience Portal. Through the EPM interface, you can configure Experience Portal, check the status of a Experience Portal component, and generate reports related to system operation.

License grace period for Proactive Outreach Manager will end on Mar 2, 2013 at 2:21:56 PM MST.

Installed Components

Media Processing Platform
Media Processing Platform (MPP) is an Avaya media processing server. When an MPP receives a call from a PBX, it invokes a VoiceXML or CCXML application on an application server and communicates with ASR and TTS servers as necessary to process the call.

Proactive Outreach Manager
Avaya Proactive Outreach Manager (POM) provides a solution for unified, multichannel, inbound and outbound architecture, with the capability to communicate through different channels of interaction, from Short Message Service (SMS) to e-mail to the traditional voice and video.

Legal Notice

© 2005 - 2012 Avaya Inc. All Rights Reserved.

Notice
While reasonable efforts were made to ensure that the information in this document was complete and accurate at the time of printing, Avaya Inc. can assume no liability for any errors. Changes and corrections to the information in this document might be incorporated in future releases.

4.1. Configure an H.323 VoIP Connection

To configure a H.323 connection, navigate to the **System Configuration → VoIP Connections** page and then click on the **H.323** tab. In the H.323 tab shown in **VoIP Connections**, set the **Gatekeeper Address** to the IP address of Communication Manager and the **Gatekeeper Port** to **1719**. Next, configure the stations for Experience Portal, which map to the 7434ND stations configured in Communication Manager. In addition, set the **Password** for the stations and set the **Station Type** to **Inbound and Outbound**.

Change H.323 Connection

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

Name: CM_10_67
Enable: Yes No
Gatekeeper Address:
Alternative Gatekeeper Address:
Gatekeeper Port:
Media Encryption: Yes No

New Stations

	From	To
Station:	<input type="text"/>	<input type="text"/>
Password:	<input type="text"/>	
	<input checked="" type="radio"/> Same Password	
	<input type="radio"/> Use sequential passwords	
Station Type:	<input type="text" value="Inbound and Outbound"/> <input type="text" value="Inbound Only"/> <input type="text" value="Maintenance"/>	
	<input type="button" value="Add"/>	

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

<input type="text" value="25501 - 25502"/>	<input type="button" value="Remove"/>
--	---------------------------------------

4.2. Configure the iAssist CSM Application

Two applications are configured in Avaya Aura® Experience Portal, one to handle inbound calls and the second one to make outbound calls.

4.2.1. Configure the Inbound CSM Application

Navigate to **System Configuration** → **Applications**. In the **Applications** page, add an Experience Portal application to handle incoming calls. Configure the application as shown below. Set the **Type** to **VoiceXML**, select **Single** for **URL**, and enter a **VoiceXML URL** provided by Acqueon. Select **Inbound** under **Application Launch** and provide **Called Number**.

Change Application

Use this page to change the configuration of an application.

Name: Inbound_CSM

Enable: Yes No

Type:

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

25501

Remove

Speech Parameters ▶

Reporting Parameters ▶

Advanced Parameters ▶

Save

Apply

Cancel

Help

4.2.2. Configure the Outbound CSM Application

In the **Applications** page, add another Experience Portal application to handle the outbound calls to the agent and caller. Configure the application as shown below.

Change Application

Use this page to change the configuration of an application.

Name: IASSISTCSMOUTBOUND

Enable: Yes No

Type: CCXML

URI

Single Fail Over Load Balance

CCXML URL:

Verify

Mutual Certificate Authentication: Yes No

Basic Authentication: Yes No

Speech Servers

ASR: TTS:

Application Launch

Inbound Inbound Default Outbound

Speech Parameters ▶

Reporting Parameters ▶

Advanced Parameters ▶

Save

Apply

Cancel

Help

4.3. Configure the Outcall Authentication

Configure the Outcall User Name and Password that will be sent by iAssist 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 iAssist CBM when it makes an outcall request to Experience Portal.

EPM Settings

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

Experience Portal Name:	<input type="text" value="ExperiencePortal"/>
Number of Application Server Failover Logs :	<input type="text" value="10"/>
Commands to Retain in Configuration History:	<input type="text" value="50"/>

Resource Alerting Thresholds (%)

	High Water	Low Water
Disk:	<input type="text" value="90"/>	<input type="text" value="80"/>

Web Service Authentication ▾

Application Reporting

User Name:	<input type="text" value="<default>"/>
Password:	<input type="password" value="••••••••"/>
Verify Password:	<input type="password"/>

Outcall

User Name:	<input type="text" value="acqueon"/>
Password:	<input type="password" value="••••••••"/>
Verify Password:	<input type="password"/>

Miscellaneous ▶

Save	Apply	Cancel	Help
-------------	--------------	---------------	-------------

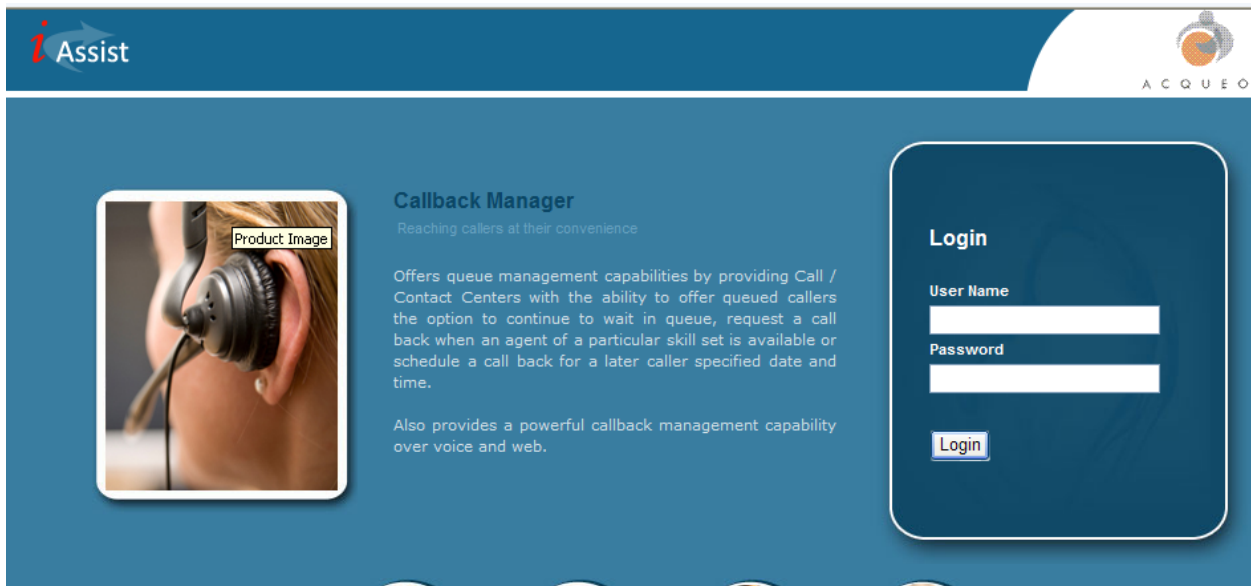
5. Configure Acqueon iAssist Call Survey Manager

This guide provides information on how to use the iAssist Admin application to administer the Call Survey Manager (CSM).

5.1. Steps to configure the Business Group

Type the URL: `http:// 10.64.101.85/iAssist` to login into the admin page followed by the User Name and the Password.

Note: The default Username is admin and the password is admin123.



Callback Manager
Reaching callers at their convenience

Offers queue management capabilities by providing Call / Contact Centers with the ability to offer queued callers the option to continue to wait in queue, request a call back when an agent of a particular skill set is available or schedule a call back for a later caller specified date and time.

Also provides a powerful callback management capability over voice and web.

Login

User Name
Password
Login

5.2. Configure the business group

BusinessGroup Management

* Mandatory

Business Group Name *	IND_CBM_DEMO
Incoming Number *	25501
Site	AVP DEMO
Language	US English
IVR Configuration Template	DEFAULT_CBM_CONFIG

Update Business Group Cancel

- Enter a valid Business Group Name.
- Set the Incoming Number to the number that routes calls to the IVR (e.g., 25612).
- Select a Site to from the dropdown menu to associate the business group to a site.
- Select the appropriate Language.
- Select the required IVR Configuration Template.

5.2.1. Configuring Business Group

- Select the CSM → Business Group Configuration tab.
- Click the Edit icon of the desired business group to edit the Defined Business Group(s) displayed in the right pane.
- The Business Group Name will be populated automatically.
- IVR IP Address [Voice Portal Management System's (VPMS) IP that has been used for dialing the agent and/ or customer].
- Enter Customer Timeout in seconds

CSM - Business Group Configurations [CSM_CVP_DEMO]	
	* Mandatory
Business Group Name	CSM_CVP_DEMO
IVR IP address *	172.16.3.71
Customer Timeout*	30

5.2.2. Business Hours and Break Hours

Business hours and break hours have to be configured in the Business Hours and Break Hours tab.

CBM - Business Group Configuration [UI Customer Service]				
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	09:00	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

To set the business group timings, choose Business Hour and Break Hour tab. Business hours and break hours should be entered in the 24-hour format. Break hour is an interval within the business hours, for example, lunch break. Callback request options will be offered to the callers based on the business hours and will not be allowed outside of this schedule. Business hours and break hours should be configured for each day of the week separately as shown.

5.2.3. Config Options

Under the Config Options menu, the description of the outcome, its reschedule value and number of retries are given.

Config Options		
* Mandatory		
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 type="checkbox"/> Leave Message	<input type="checkbox"/> Close if Answering Machine

- To edit a defined config option:
- Select the Edit icon corresponding to the business group whose configurations are to be Modified
- 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 if the call is diverted to the answering machine. By enabling this option, the contact will be closed without further retries.

5.2.4. Create Survey

- To configure the survey, in the assist admin home screen, click CSM → Survey.

Create New Survey

* Mandatory

SurveyName *	<input type="text" value="CUSTFEEDBACK"/>
SurveyType *	<input type="text" value="IVRSurvey"/>
BusinessGroupName *	<input type="text" value="CSM_CVP_DEMO"/>
Active Start Time (MM/DD/YYYY) *	<input type="text" value="12/4/2012"/>
Active End Time (MM/DD/YYYY) *	<input type="text" value="12/31/2013"/>

- Enter a Survey Name.
- Select a Survey Type from the dropdown menu.
- Select a BusinessGroupName entitled 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.

Two types of surveys can be configured in the CSM application.

- An IVRSurvey 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 on a call.
- However, at any given time, only one survey can be hosted for one business group.

5.2.5. Create Survey Questions

Create Survey Questions

* Mandatory

Question *	<input type="text" value="Issue_resolved"/>
Question File Name *	<input type="text" value="6002.wav"/>
Question Type *	<input type="text" value="YesNo"/>

Bulk Upload

Question File	<input type="text"/>	<input type="button" value="Browse..."/>
---------------	----------------------	--

Defined Survey Questions

Questions	Edit	Delete
Issue_resolved		
level_of_Knowledge		
question1		
question10		
question2		
question3		
question4		
question5		
question6		

- Enter a name for the question in the Question field. For e.g. IVRSatisfaction, Agent Performance etc.
- 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 alongside 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.

5.2.6. Select Questions

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. To avoid repeated deletion and inclusion of Survey questions for each survey, 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.

Select Questions

CUSTFEEDBACK

Select	Question	Question Type	Allow recording
<input checked="" type="checkbox"/>	Issue_resolved	Yes/No	<input type="checkbox"/>
<input checked="" type="checkbox"/>	level_of_Knowledge	Choice	<input type="checkbox"/>
<input checked="" type="checkbox"/>	question1	Yes/No	<input type="checkbox"/>
<input type="checkbox"/>	question10	Number	<input type="checkbox"/>

Select Questions

CUSTFEEDBACK

Question No	Question	Question Type	Next Question1	Next Question2	Next Question3	Next Question4	Next Question5	Allow record
11	Issue_resolved	Yes/No	Yes: 12	No: 12				<input type="checkbox"/>
12	level_of_Knowledge	Choice	1: 1	2: 1	3: 1	4: 1	5: 1	<input type="checkbox"/>
1	question1	Yes/No	Yes: End	No: End				<input type="checkbox"/>

- In the Question column, the selected questions are displayed in the order changed in the previous screen. Map the questions required for the survey, in the left pane. For example, the survey should continue if the answer is 1,2,3,4 to the first question, select the next question from the drop-down menu in NextQuestion1 column. If the survey has to end when the

answer is 5, select End from the drop-down menu in NextQuestion5 column. The option to select/deselect Allow record is still available and can be used if required.

- Map all the questions populated and select Finish. This completes configurations required for CSM and the application is now functional.

5.2.7. Call Flow Generator

Under this section, call flows can be generated for a business group or business group collection.

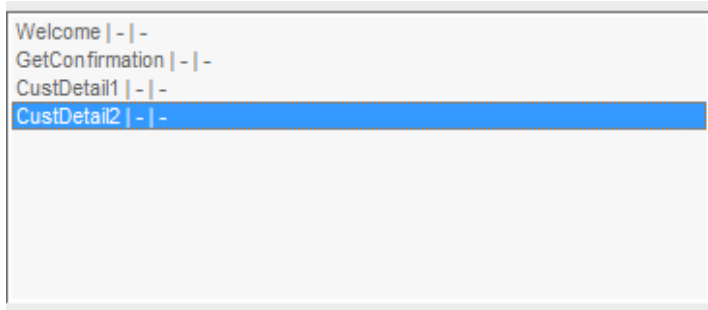
- To generate a Call Flow
- Specify a Call Flow Name.
- Select the required Site.
- Select the desired application from the drop down list in the Application field.
- Select the Filter Type.

CallFlow Name *	<input type="text" value="IND_CSM"/>
Site *	<input type="text" value="AVP DEMO"/>
Application	<input type="text" value="CSM - Inbound"/>
FilterType *	<input type="radio"/> By Business Group Collection <input checked="" type="radio"/> By BusinessGroupID
Business Group *	<input type="checkbox"/> Select All <div style="border: 1px solid gray; padding: 5px;"><input checked="" type="checkbox"/> IND_CSM_CUST_RATING <input type="checkbox"/> test</div>
Defined Elements	
Use Template	<input type="checkbox"/>
Element Name *	<input type="text" value="--SELECT--"/>
VoiceFileName	<input type="text"/>
Value	<input type="text"/>
<input type="button" value="Add Element"/>	

Select the Use Template option to use the inbuilt IVR templates. By enabling it, a pre-defined call flow will be displayed below.

To Add New Elements to the pre-defined template:

Select the Use Template option. The pre-defined call flow will be displayed in the below dialog box.



- Select the Element Name.
- Specify the Voice File Name (not mandatory).
- Specify the Value (not mandatory).
- Click Add Element. The new element will be added to the pre-defined call flow.
- Click Generate Call Flow to save the changes.

6. 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 MPP server is online and running in the **System Monitor** page shown below.

System Monitor (Feb 7, 2013 3:46:51 PM MST)



[Refresh](#)

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: Feb 7, 2013 3:46:49 PM MST											
Server Name	Type	Mode	State	Config	Call Capacity			Active Calls		Calls Today	Alarms
					Current	Licensed	Maximum	In	Out		
EPM	EPM										✓
MPPRemote	MPP	Online	Running	OK	17	17	100	0	0	1	✓
Summary					17	17	100	0	0	1	✓

[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.

Port Distribution (Feb 7, 2013 3:47:20 PM MST)



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: 17 Last Poll: Feb 7, 2013 3:47:09 PM MST

Port	Mode	State	Port Group	Protocol	Current Allocation	Base Allocation
25501	Online	In service	CM_10_67	H323	MPPRemote	
25502	Online	In service	CM_10_67	H323	MPPRemote	

7. 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.

8. Additional References

This section references the product documentation that is relevant to these Application Notes.

- [1] Administering Avaya Aura® Experience Portal, April 2012
- [2] Administering Avaya Aura® Communication Manager, Release 6.2, Document 03-300509, Issue 7.0, December 2012
- [3] iAssist CSM 2.0 Admin Guide

©2013 Avaya Inc. All Rights Reserved.

Avaya and the Avaya Logo are trademarks of Avaya Inc. All trademarks identified by ® and ™ are registered trademarks or trademarks, respectively, of Avaya Inc. All other trademarks are the property of their respective owners. The information provided in these Application Notes is subject to change without notice. The configurations, technical data, and recommendations provided in these Application Notes are believed to be accurate and dependable, but are presented without express or implied warranty. Users are responsible for their application of any products specified in these Application Notes.

Please e-mail any questions or comments pertaining to these Application Notes along with the full title name and filename, located in the lower right corner, directly to the Avaya DevConnect Program at devconnect@avaya.com.