Avaya Solution & Interoperability Test Lab

Application Notes for Configuring 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.

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.

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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 to 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.

Another Acqueon related solution is described in Application Notes for Acqueon iAssist Call Back Manager with Avaya Aura® Experience Portal. This is mentioned here since CSM and Call Back Manager resides on the same server and Cal Back Manager will be mentioned in this Application notes.

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

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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 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 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

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3. Reference Configuration

Configuration**Error! Reference source not found.** illustrates the configuration used for testing. In this configuration, Avaya Experience Portal interfaces with Avaya Aura® Communication Manager via SIP. The iAssist Admin Server server hosted the iAssist CSM applications supporting the CSM inbound and modules. The Acqueon iAssist Admin server contained the Microsoft SQL database and also was used to configure the iAssist CSM application.

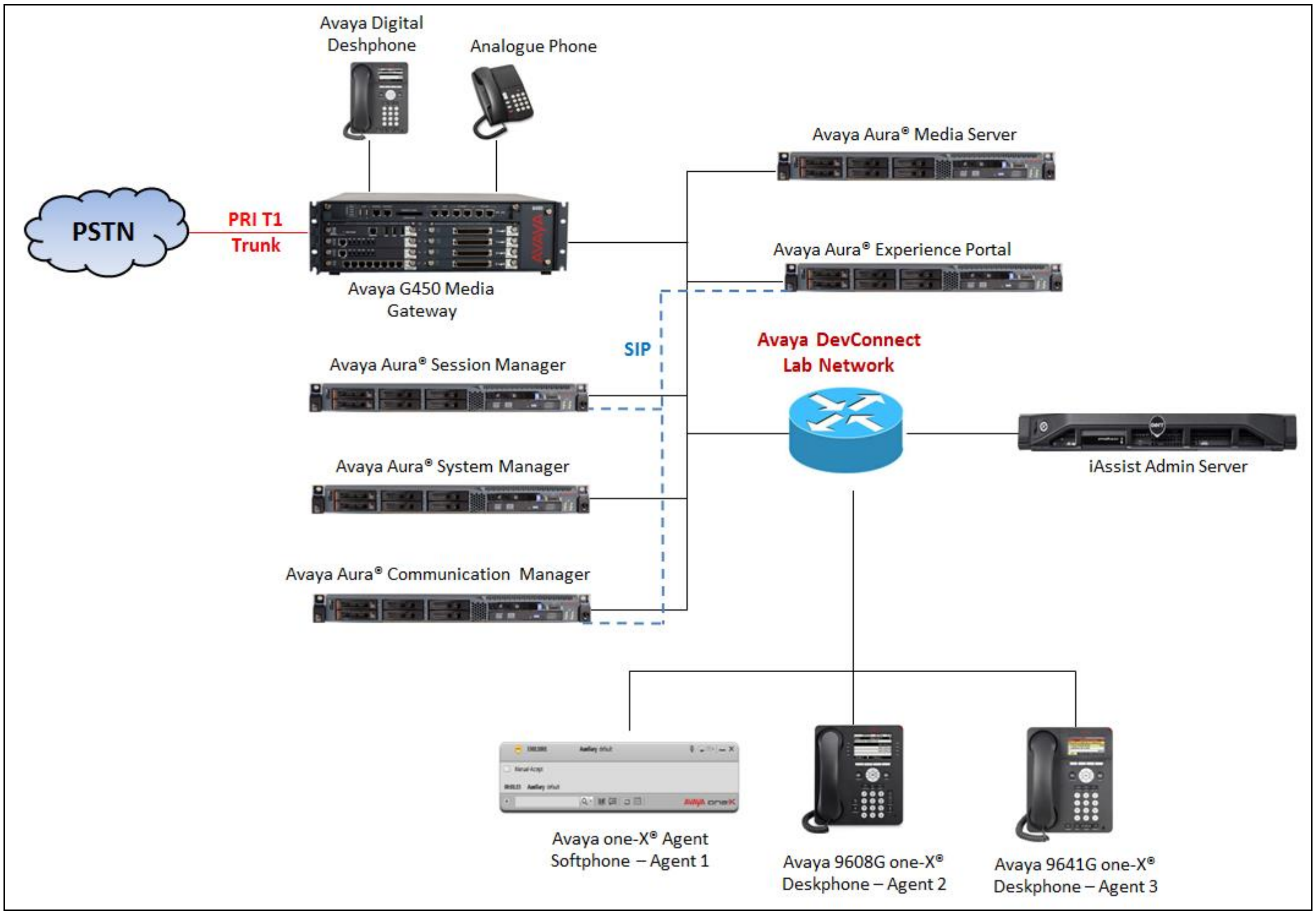

Figure 1: Test Configuration Diagram

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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	R017x.00.0.441.0 Patch 23523
Avaya Aura® System Manager running on Virtualized Environment	7.1.0.0.116662
Avaya Aura® Session Manager running on Virtualized Environment	7.1.0.0.710028
Avaya Aura® Media Server running on Virtualized Environment	7.8
Avaya Aura® Experience Portal running on Virtualized Environment	7.1.0.0.1107
Avaya G450 Media Gateway	38.19.0
Avaya 9641G H323 IP Deskphone	6.6.4
Avaya 9608G SIP IP Deskphone	7.1.29
Acqueon iAssist Callback Manager application running on Windows Server 2012	2.2.1.6

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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 SIP Signaling
- Administer SIP Trunk
- Administer Route Pattern
- Administer Dial Plan
- Administer AAR table

5.1. Administer Signaling Group

Use the "add signaling-group n" command, where "n" is an available signaling group number, in this case "1". Enter the following values for the specified fields, and retain the default values for the remaining fields.

- **Group Type:** "sip"
- **Transport Method:** "tls"
- **Near-end Node Name:** An existing C-LAN node name or "procr".
- **Far-end Node Name:** The existing node name for Session Manager.
- **Near-end Listen Port:** Enter port TLS 5061.
- **Far-end Listen Port:** The same port number as in **Near-end Listen Port**.
- **Far-end Network Region:** Enter an existing network region
- **Far-end Domain:** The applicable domain name for the network.
- **Direct IP-IP Audio Connections:** "y"

```
change signaling-group 1                                          Page   1 of   3
                                SIGNALING GROUP

 Group Number: 1              Group Type: sip
  IMS Enabled? n        Transport Method: tls
        Q-SIP? n
     IP Video? n                                  Enforce SIPS URI for SRTP? n
  Peer Detection Enabled? n  Peer Server: SM
 Prepend '+' to Outgoing Calling/Alerting/Diverting/Connected Public Numbers? y
Remove '+' from Incoming Called/Calling/Alerting/Diverting/Connected Numbers? n
Alert Incoming SIP Crisis Calls? n
   Near-end Node Name: procr                  Far-end Node Name: interopASM
 Near-end Listen Port: 5061                 Far-end Listen Port: 5061
                                         Far-end Network Region: 1

Far-end Domain: bvwdev.com
                                              Bypass If IP Threshold Exceeded? n
Incoming Dialog Loopbacks: eliminate                   RFC 3389 Comfort Noise? n
         DTMF over IP: rtp-payload              Direct IP-IP Audio Connections? y
Session Establishment Timer(min): 3                      IP Audio Hairpinning? n
         Enable Layer 3 Test? y                      Initial IP-IP Direct Media? n
H.323 Station Outgoing Direct Media? n               Alternate Route Timer(sec): 6
```


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5.2. Administer Trunk Group

Use the "add trunk-group n" command, where "n" is an available trunk group number, in this case "1". Enter the following values for the specified fields, and retain the default values for the remaining fields.

- **Group Type:** "sip"
- **Group Name:** A descriptive name.
- **TAC:** An available trunk access code.
- **Service Type:** "tie"
- **Signaling Group:** The signaling group number from **Section 5.1**.
- **Number of Members:** The desired number of members, in this case "14".

```
add trunk-group 1                                                    Page   1 of  22
                                TRUNK GROUP

Group Number: 1                    Group Type: sip           CDR Reports: y
  Group Name: Private Trunk               COR: 1        TN: 1        TAC: #01
   Direction: two-way        Outgoing Display? n
 Dial Access? n                                   Night Service:
Queue Length: 0
Service Type: tie                    Auth Code? n
                                              Member Assignment Method: auto
                                                      Signaling Group: 1
                                                    Number of Members: 14
```


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5.3. Administer Route Pattern

Use the “change route-pattern n” command, where “n” is an existing route pattern number to be used to reach Experience Portal, in this case “1”. Enter the following values for the specified fields, and retain the default values for the remaining fields.

- **Pattern Name:** A descriptive name.
- **Grp No:** The SIP trunk group number from **Section 5.2**
- **FRL:** A level that allows access to this trunk, with 0 being least restrictive.

```
change route-pattern 1                                          Page   1 of   3
                    Pattern Number: 1      Pattern Name: SIP-TLS-To-SM
    SCCAN? n    Secure SIP? n     Used for SIP stations? n

    Grp FRL NPA Pfx Hop Toll No.  Inserted                            DCS/ IXC
    No          Mrk Lmt List Del  Digits                              QSIG
                             Dgts                                     Intw
 1: 1    0                                                             n   user
 2:                                                                    n   user
 3:                                                                    n   user
 4:                                                                    n   user
 5:                                                                    n   user
 6:                                                                    n   user

     BCC VALUE  TSC CA-TSC    ITC BCIE Service/Feature PARM Sub  Numbering LAR
    0 1 2 M 4 W     Request                                Dgts  Format
 1: y y y y y n  n            rest                               lev0-pvt  next
 2: y y y y y n  n            rest                                         none
 3: y y y y y n  n            rest                                         none
 4: y y y y y n  n            rest                                         none
 5: y y y y y n  n            rest                                         none
 6: y y y y y n  n            rest                                         none
```


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5.4. Administer Dial Plan

This section provides a sample dial plan used for routing calls with dialed digits 49xx to Experience Portal. Use the "change dialplan analysis 0" command, and add an entry to specify the use of digits pattern 49, as shown below.

```
change dialplan analysis                                       Page   1 of  12
                             DIAL PLAN ANALYSIS TABLE
                                   Location: all           Percent Full: 4

    Dialed   Total  Call      Dialed   Total  Call      Dialed   Total  Call
    String   Length Type      String   Length Type      String   Length Type
   0           3   fac       43          4   aar
   1           4   ext       49          4   aar
   13          5   aar       46          4   aar
   14          5   aar       50          5   aar
   20          4   aar       546         5   aar
   23          5   aar       56          5   udp
   24          5   aar       60          5   udp
   28          5   aar       8           1   fac
   30          4   aar       9           1   fac
   33          4   ext       *           3   dac
```

5.5. Administer AAR Table

Use the "change aar analysis 0" command, and add an entry to specify how to route calls to 49xx. In the example shown below, calls with digits 49xx will be routed as an AAR call using route pattern "1" from **Section 5.3**

```
change aar analysis 49                                         Page   1 of   2
                             AAR DIGIT ANALYSIS TABLE
                                   Location: all           Percent Full: 2

          Dialed           Total      Route     Call   Node  ANI
          String          Min  Max   Pattern    Type   Num   Reqd
    49                    4    4      1         aar          n
```


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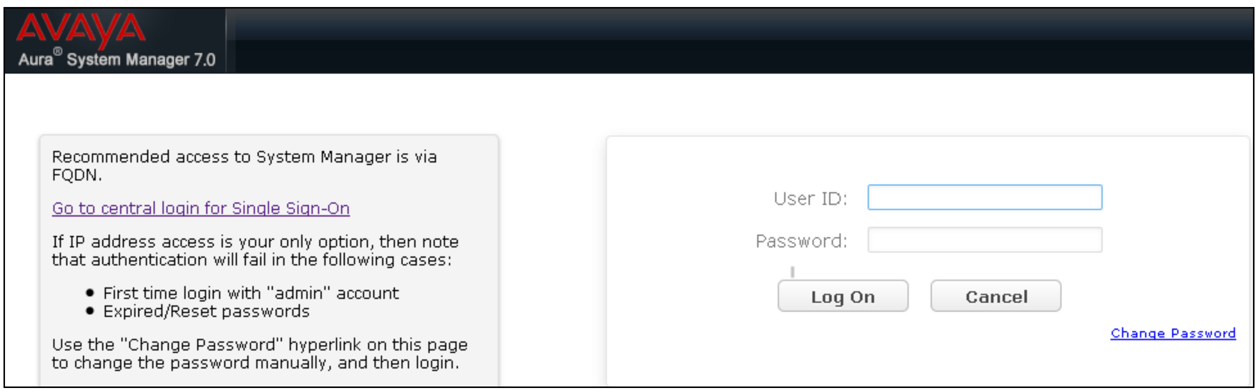
6. Configure Avaya Aura® Session Manager

This section provides the procedures for configuring Session Manager. The procedures include the following areas:

- Launch System Manager
- Administer Domain
- Administer locations
- Administer Adaptation
- Administer SIP entities
- Administer routing policies
- Administer dial patterns

6.1. Launch System Manager

Access the System Manager web interface by using the URL “https://ip-address” in an Internet browser window, where “ip-address” is the IP address of System Manager. Log in using the appropriate credentials.



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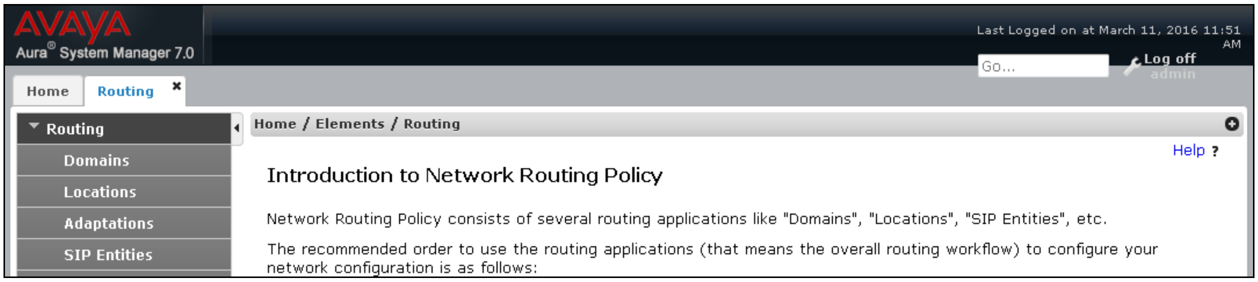
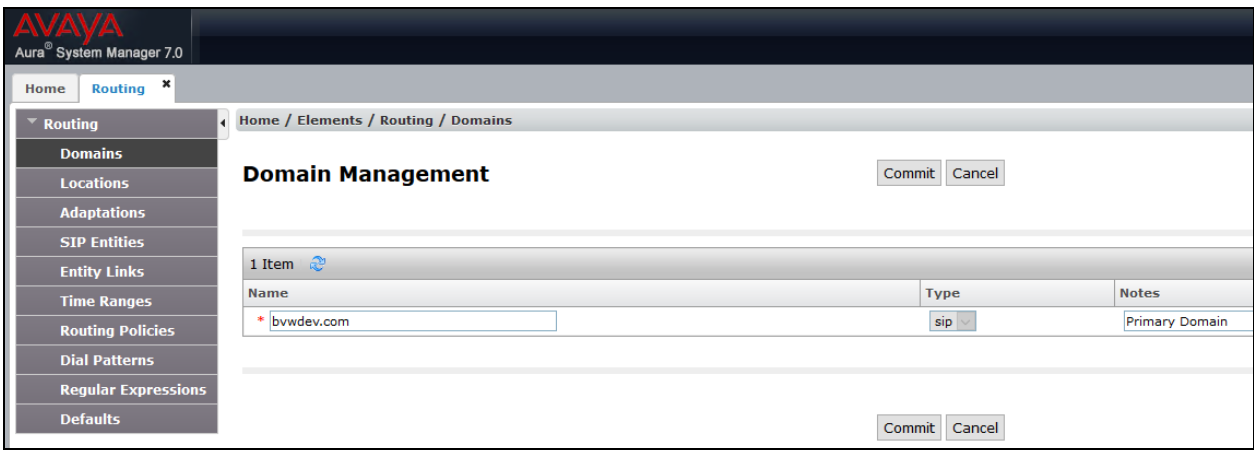
6.2. Administer Domain

In the subsequent screen (not shown), select **Elements → Routing** to display the **Introduction to Network Routing Policy** screen below. Select **Routing → Domains** from the left pane, and click **New** in the subsequent screen (not shown) to add a new domain



The **Domain Management** screen is displayed. In the **Name** field enter the domain name, select *sip* from the **Type** drop down menu and provide any optional **Notes**.



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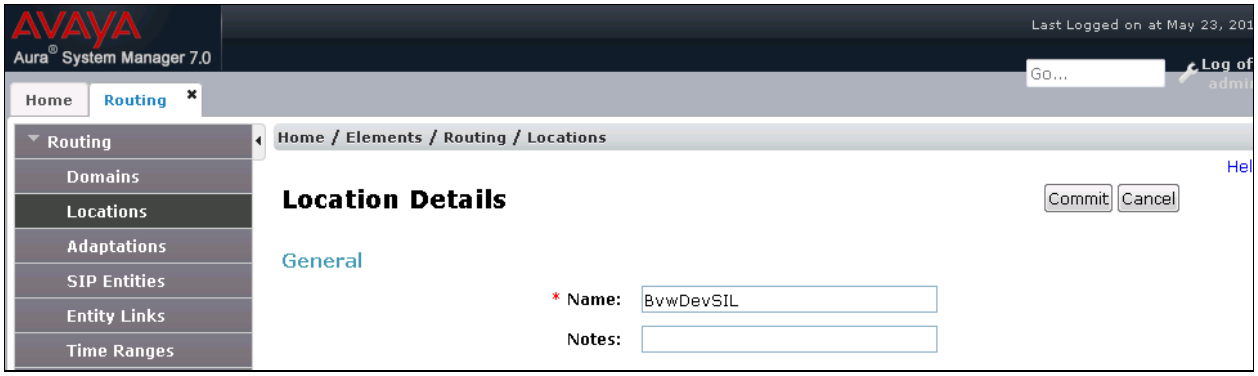
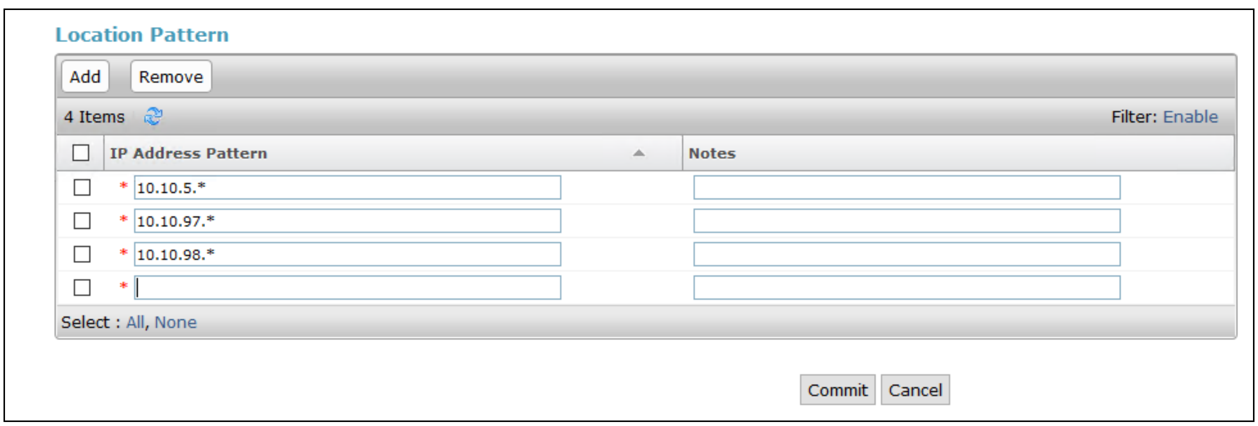
6.3. Administer Locations

Select **Routing → Locations** from the left pane, and click **New** in the subsequent screen (not shown) to add a new location.

The **Location Details** screen is displayed. In the **General** sub-section, enter a descriptive **Name** and optional **Notes**. Retain the default values in the remaining fields.



Scroll down to the **Location Pattern** sub-section, click **Add** and enter the IP address of all devices involved in the compliance testing in **IP Address Pattern**, as shown below. Retain the default values in the remaining fields.



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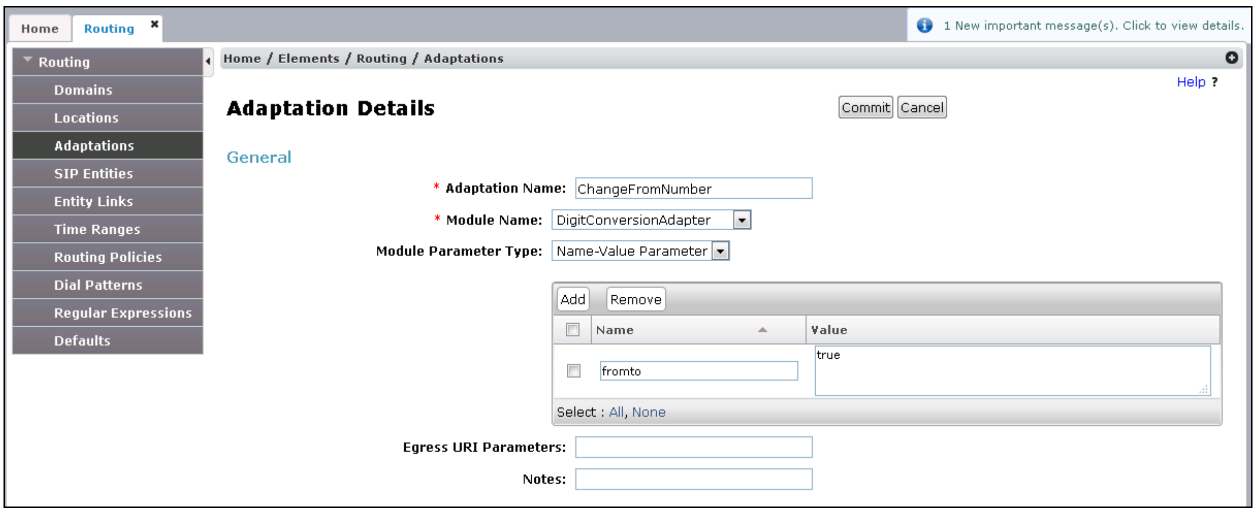
6.4. Administer Adaptation

The adaptation below was used for iAssist Callback Manager and was not applied for Call Survey Manager since the calling numbers 4905 was configured in Experience Portal to launch the CSM application.

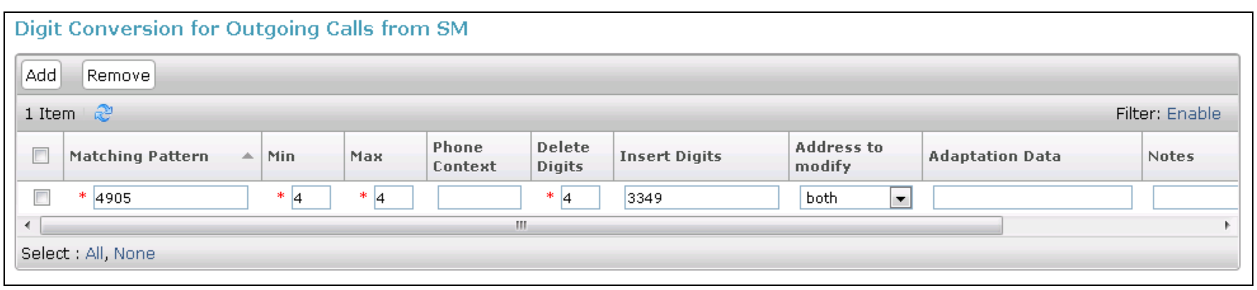
- **Adaptation Name** An informative name (e.g., ChangeFromNumber)
- **Module Name** Select **DigitConversionAdapter**
- **Module Parameter Type** Select **Name-Value Parameter**

Click **Add** to add a new row for the following values as shown below table:

Name	**Value**
fromto	true



(Continue) the screenshot to show the **Digit Conversion for Outgoing Calls from SM** section.



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6.5. Administer SIP Entities

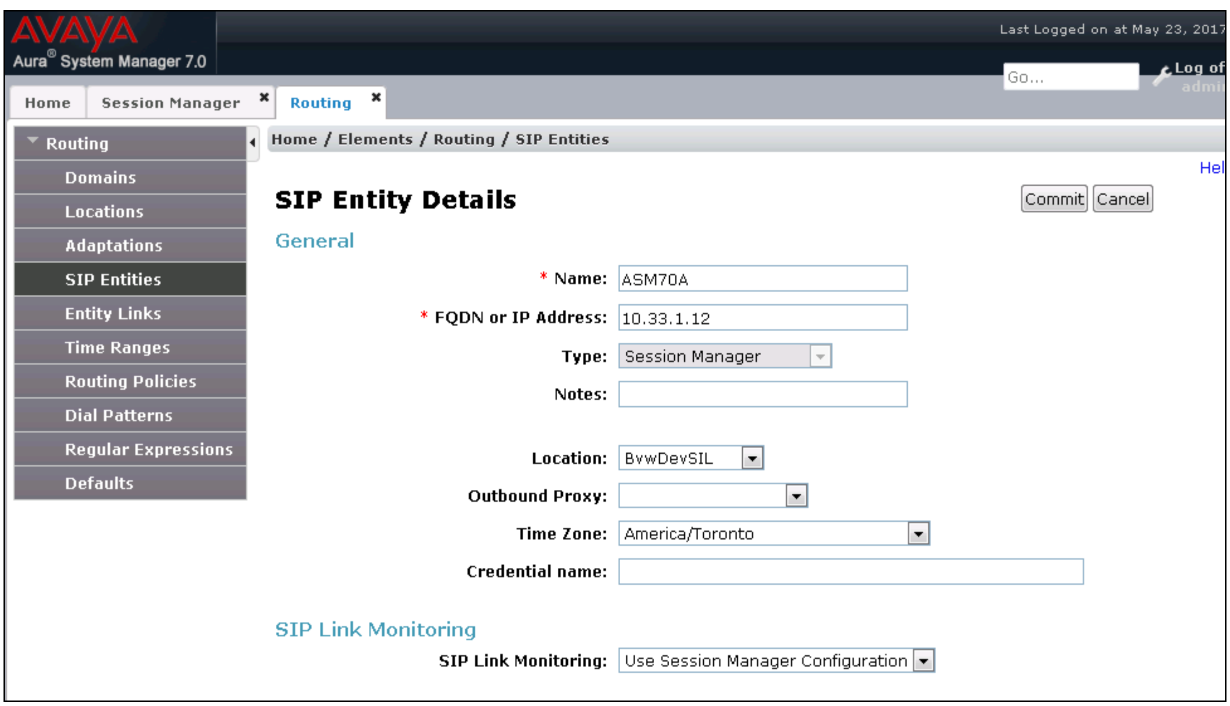
A SIP Entity must be added for Session Manager and for each SIP telephony system connected to it, which includes Communication Manager and Experience Portal.

6.5.1. SIP Entity for Session Manager

Navigate to **Routing → SIP Entities** in the left navigation pane and click on the **New** button in the right pane (not shown). In the **General** section, enter the following values. Use default values for all remaining fields:

- **Name:** Enter a descriptive name.
- **FQDN or IP Address:** Enter the FQDN or IP address of the SIP Entity that is used for SIP signaling.
- **Type:** Select **Session Manager** for Session Manager.
- **Adaptation:** This field is only present if **Type** is not set to **Session Manager**. If Adaptations were to be created, here is where they would be applied to the entity.
- **Location:** Select the location that applies to the SIP Entity being created, defined in **Section 6.3**.
- **Time Zone:** Select the time zone for the location above.

The following screen shows the addition of the **Session Manager** SIP Entity for Session Manager. The IP address of the Session Manager Security Module is entered in the **FQDN or IP Address** field.



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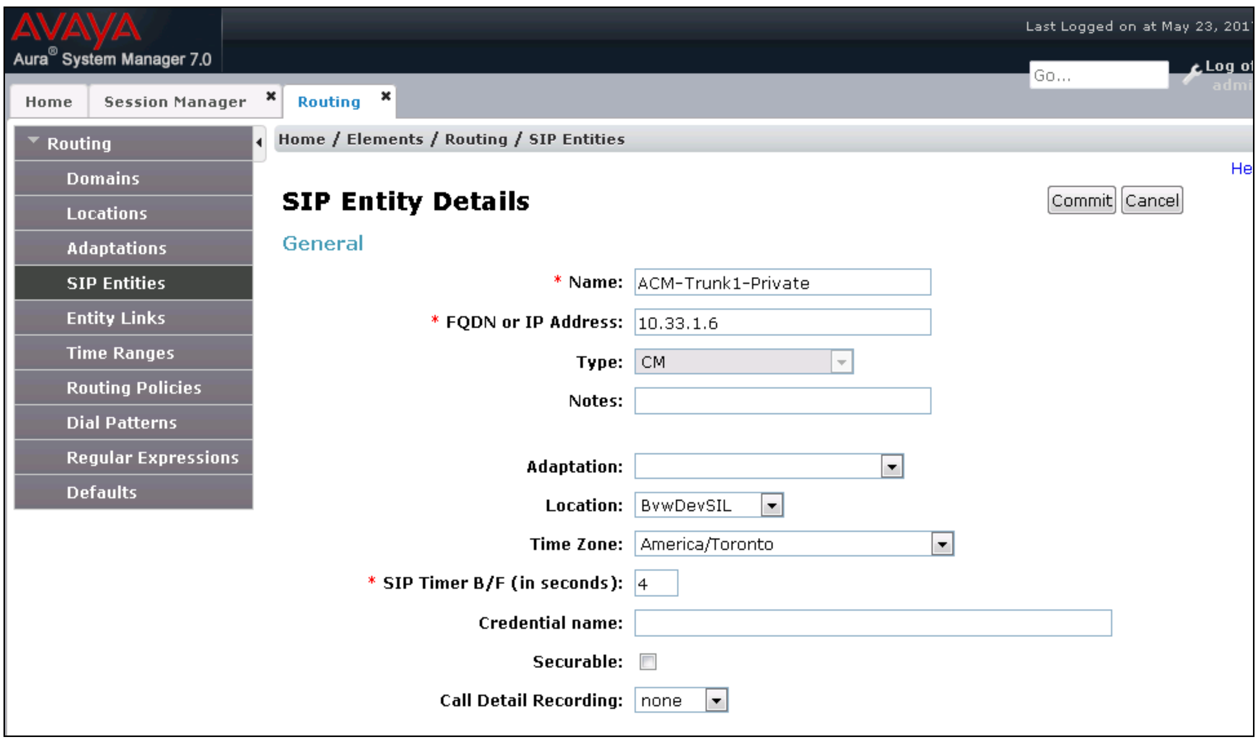
6.5.2. SIP Entity for Communication Manager

Select **Routing → SIP Entities** from the left pane, and click **New** in the subsequent screen (not shown) to add a new SIP entity for Communication Manager.

The **SIP Entity Details** screen is displayed. Enter the following values for the specified fields, and retain the default values for the remaining fields.

- **Name:** A descriptive name.
- **FQDN or IP Address:** The IP address of an existing CLAN or the processor interface.
- **Type:** Select "CM" in the dropdown list.
- **Notes:** Any desired notes.
- **Location:** Select the applicable location for Communication Manager.
- **Time Zone:** Select the applicable time zone.



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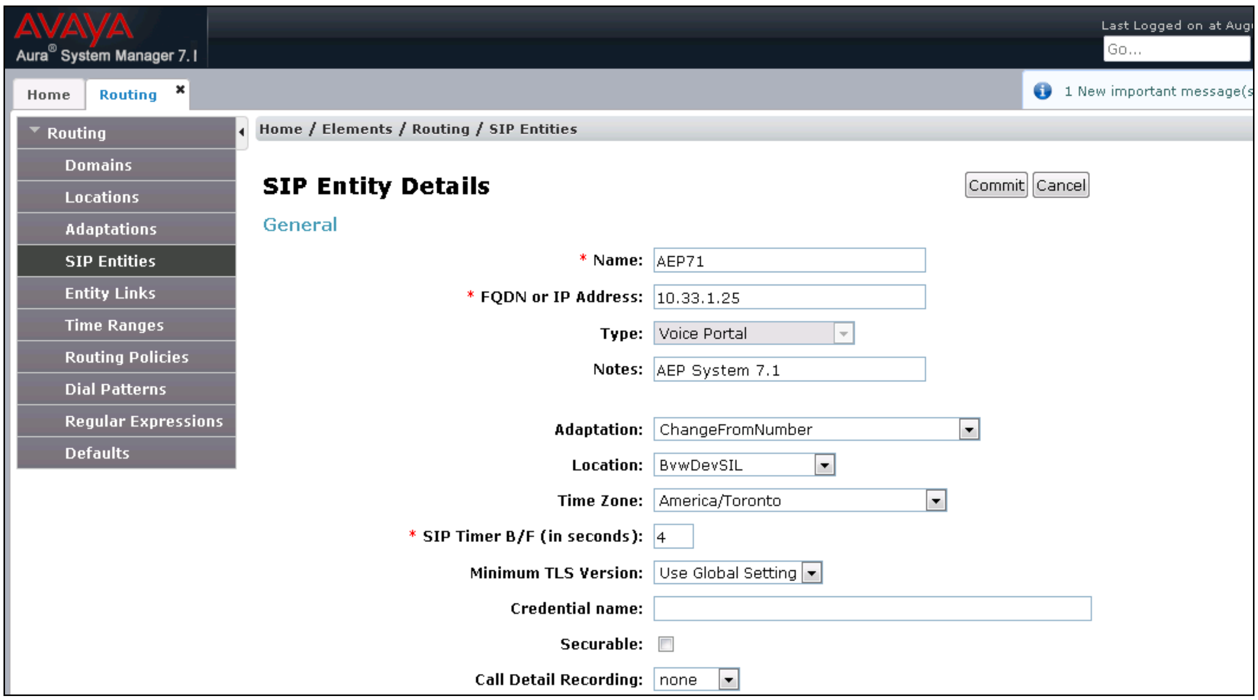
6.5.3. SIP Entity for Experience Portal

Select **Routing → SIP Entities** from the left pane, and click **New** in the subsequent screen (not shown) to add a new SIP entity for Experience Portal.

The **SIP Entity Details** screen is displayed. Enter the following values for the specified fields, and retain the default values for the remaining fields.

- **Name:** A descriptive name.
- **FQDN or IP Address:** The IP address of the Experience Portal server.
- **Type:** Select "Voice Portal" in the dropdown list.
- **Notes:** Any desired notes.
- **Adaptation:** Select the adaptation configured in **Section 6.4**
- **Location:** Select the applicable location from **Section 6.3**.
- **Time Zone:** Select the applicable time zone.



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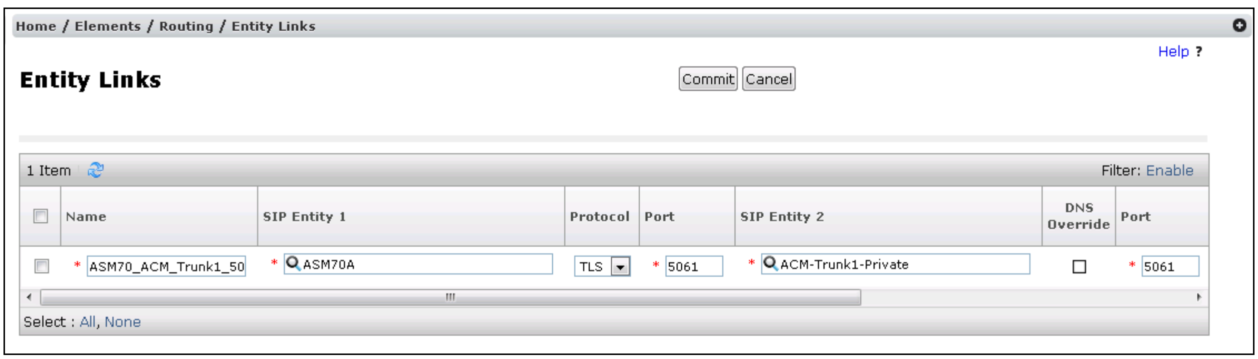
6.6. Administer Entity Links

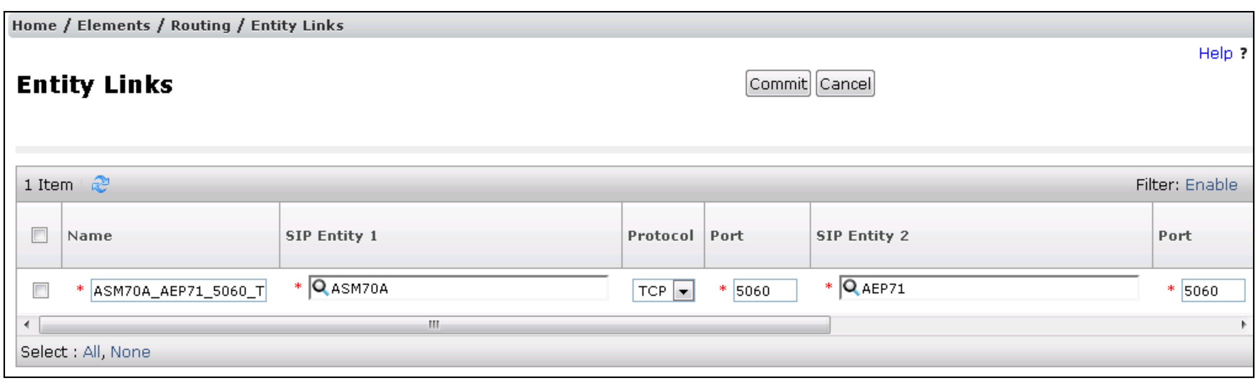
A SIP trunk between Session Manager and a telephony system is described by an Entity Link. Two Entity Links were created; one to the Communication Manager and one to Experience Portal. To add an Entity Link, select to **Routing → Entity Links** in the left navigation pane and click on the **New** button in the right pane (not shown). Configure the following values:

- **Name:** Enter a descriptive name.
- **SIP Entity 1:** Select the Session Manager from the drop-down menu.
- **Protocol:** Select applicable transport protocol.
- **Port:** Port number on which Session Manager will receive SIP requests from the far-end.
- **SIP Entity 2:** Select the name of the other systems from the drop-down menu.
- **Port:** Port number on which the other system receives SIP requests from Session Manager.
- **Connection Policy:** Select **Trusted** (not shown) to allow calls from the associated SIP Entity.

The screens below show the Entity Link to Communication Manager and Experience Portal. During the compliance test, **TLS** transport with port **5061** was used between Session Manager and Communication Manager.



The Entity Link to Experience Portal is shown below; **TCP** transport and port **5060** were used.



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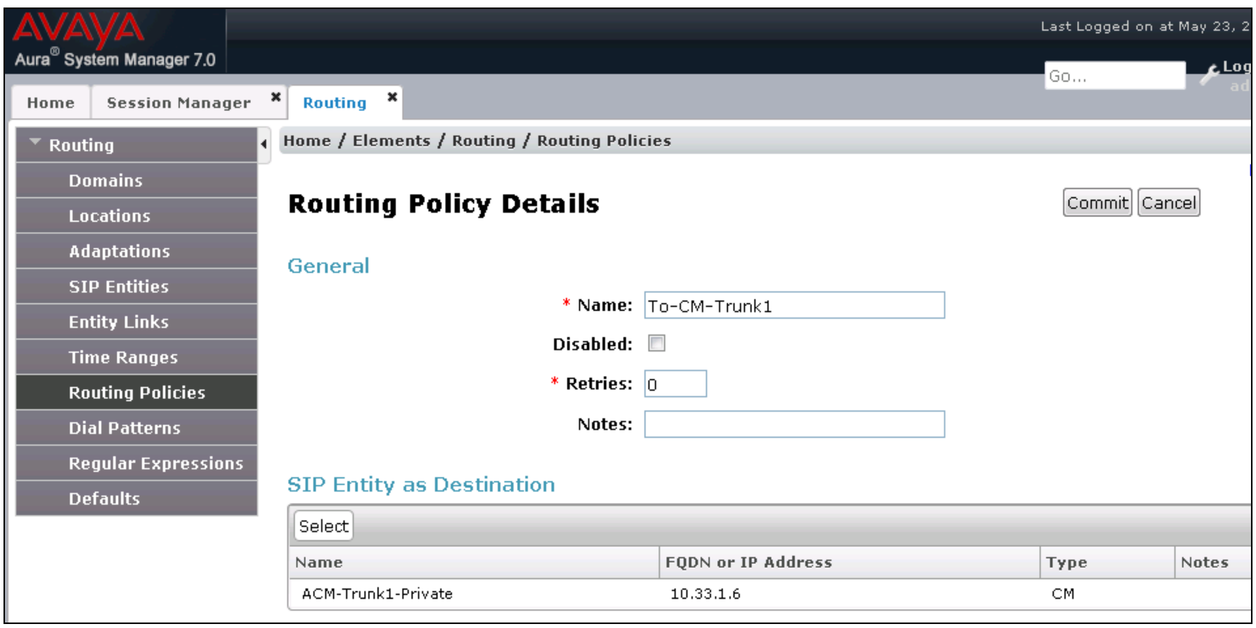
6.7. Administer Routing Policies

Routing policies describe the conditions under which calls will be routed to the SIP Entities specified in **Section 6.5**. Two routing policies were added: an incoming policy with Communication Manager as the destination, and an incoming policy to Experience Portal. To add a routing policy, select to **Routing → Routing Policies** in the left navigation pane and click on the **New** button in the right pane (not shown). The following screen is displayed:

- In the **General** section, enter a descriptive **Name** and add a brief description under **Notes** (optional).
- In the **SIP Entity as Destination** section, click **Select**. The **SIP Entity List** page opens (not shown). Choose the appropriate SIP entity to which this routing policy applies (**Section 6.5**) and click **Select**. The selected SIP Entity displays on the **Routing Policy Details** page as shown below.
- Use default values for remaining fields.
- Click **Commit** to save.

The following screen shows the Routing Policy for Communication Manager.



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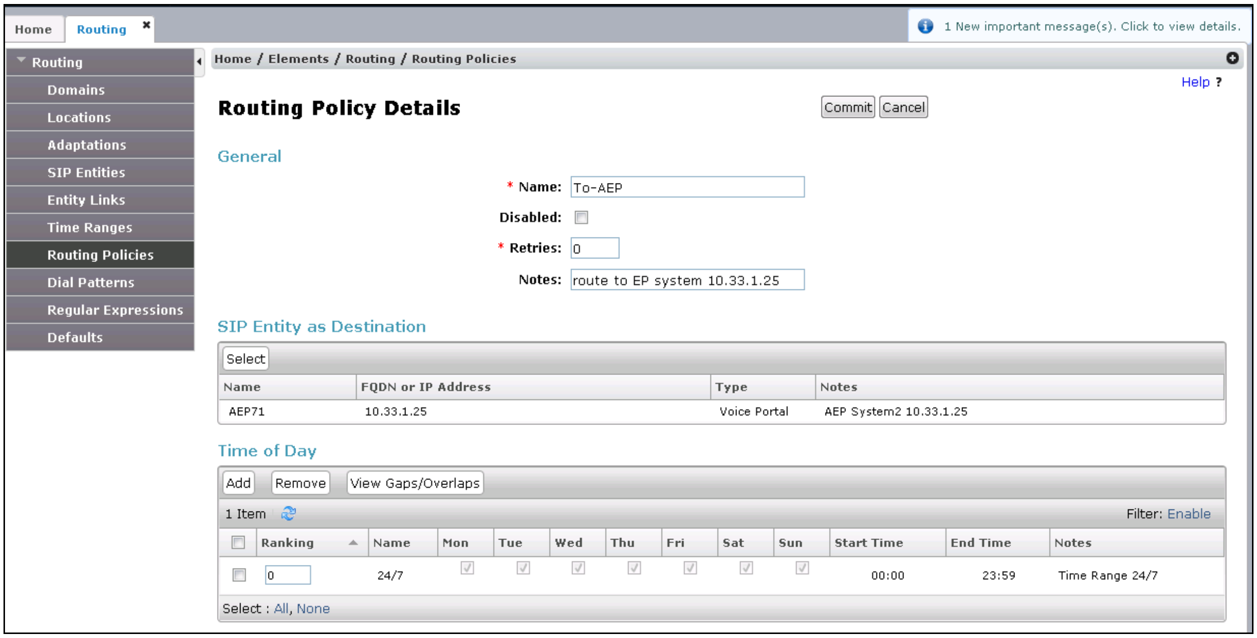
The following screen shows the Routing Policy for Experience Portal.



6.8. Administer Dial Patterns

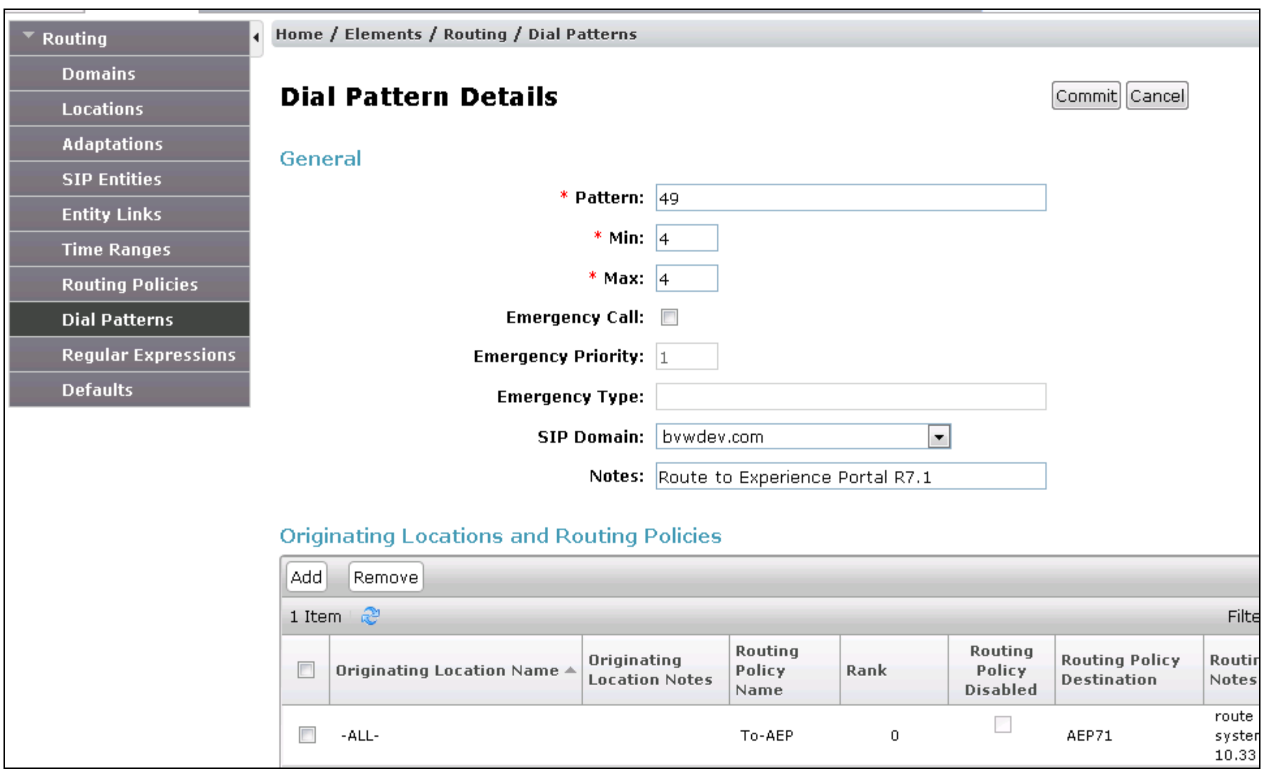
Dial Patterns are needed to route specific calls through Session Manager. For the compliance test, dial patterns were needed to route calls from Communication Manager to Experience Portal and vice versa. Dial Patterns define which route policy will be selected for a particular call based on the dialed digits, destination domain and originating location.

6.8.1. Dial Pattern for Experience Portal

Select **Routing → Dial Patterns** from the left pane, and click **New** in the subsequent screen (not shown) to add a new dial pattern to reach Trio Enterprise. The **Dial Pattern Details** screen is displayed. In the **General** sub-section, enter the following values for the specified fields, and retain the default values for the remaining fields.

- **Pattern:** A dial pattern to match, in this case “49”.
- **Min:** The minimum number of digits to match.
- **Max:** The maximum number of digits to match.
- **SIP Domain:** The signaling group domain name from **Section 6.2**.

In the **Originating Locations and Routing Policies** sub-section, click **Add** and create an entry for reaching Experience Portal. In the compliance testing, the entry allowed for all call originations in the location “ALL”. The Experience Portal routing policy from **Section 6.7** was selected as shown below.



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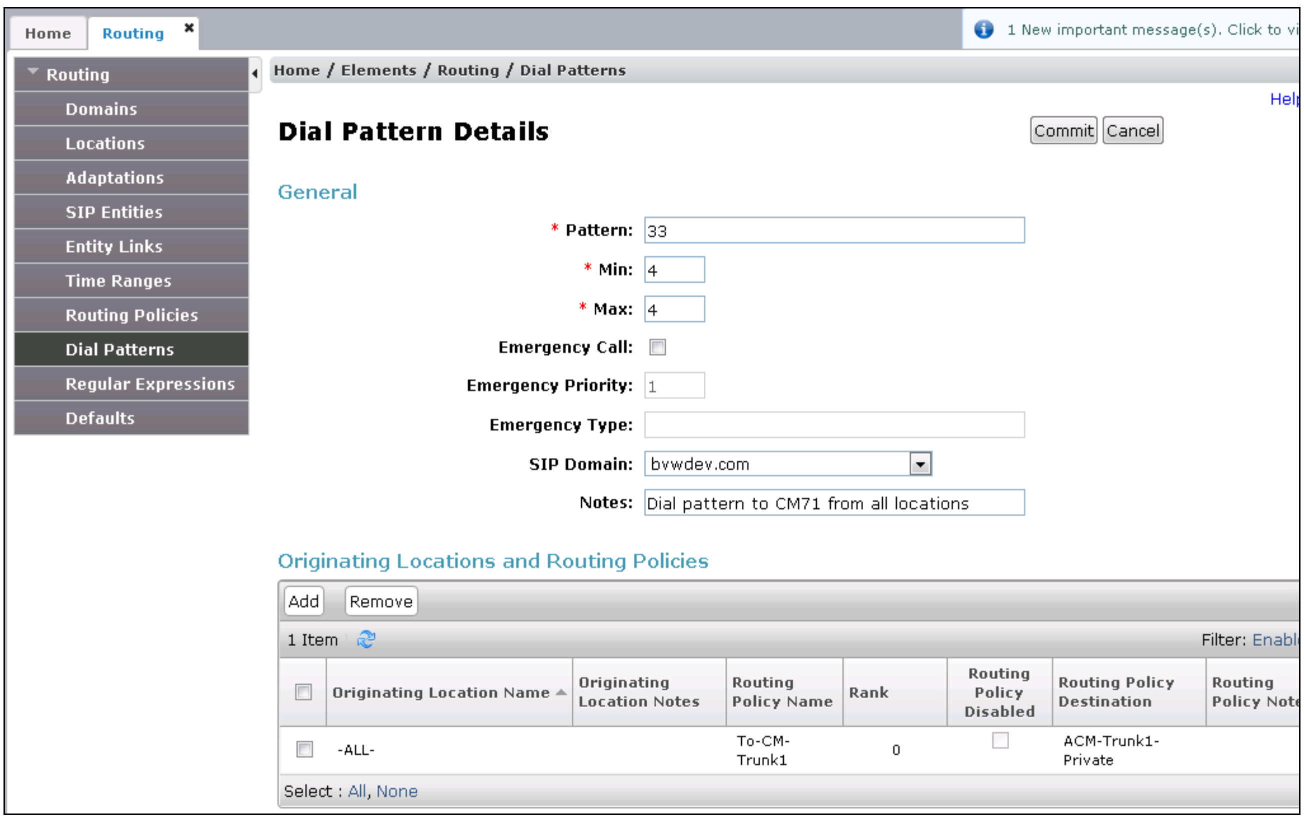
6.8.2. Dial Pattern for Communication Manager

Select **Routing → Dial Patterns** from the left pane, and click **New** in the subsequent screen (not shown) to add a new dial pattern to reach Communication Manager. The **Dial Pattern Details** screen is displayed. In the **General** sub-section, enter the following values for the specified fields, and retain the default values for the remaining fields.

- **Pattern:** A dial pattern to match, in this case "33".
- **Min:** The minimum number of digits to match.
- **Max:** The maximum number of digits to match.
- **SIP Domain:** The signaling group domain name from **Section 6.2**.

In the **Originating Locations and Routing Policies** sub-section, click **Add** and create an entry for reaching Communication Manager. In the compliance testing, the entry allowed for all originating locations "ALL". The Communication Manager routing policy from **Section 6.7** was selected as shown below.



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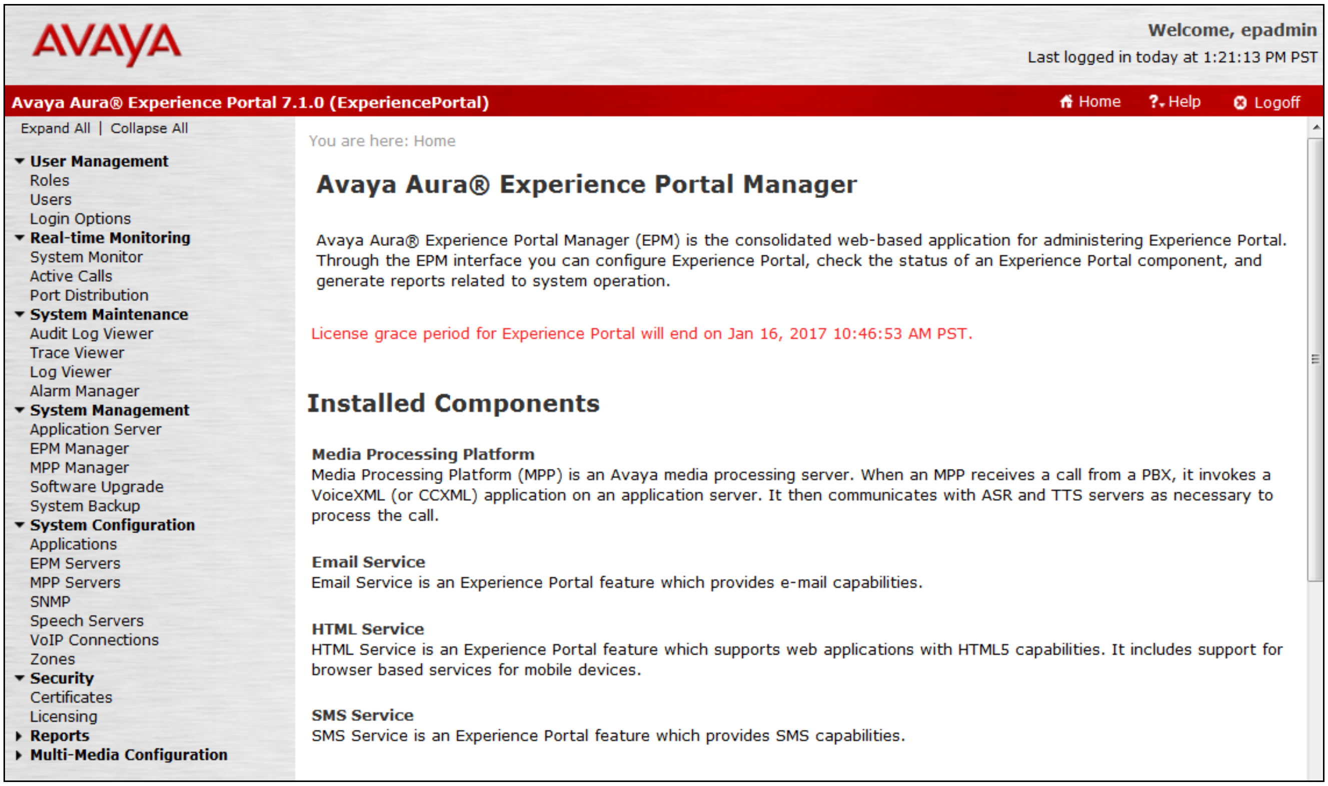
7. Configure Avaya Aura® Experience Portal

Avaya Aura® Experience Portal is configured via the Experience Portal Manager (EPM) web interface, to access the web interface, enter **http://<*ip-addr*>/** as the URL in a web browser, where <*ip-addr*> is the IP address of EPM. Log in using the appropriate credentials.

Note: Some of the screens in this section are shown after the Experience Portal had been configured. Ensure to save the screen parameters as you configure Avaya Aura® Experience Portal.



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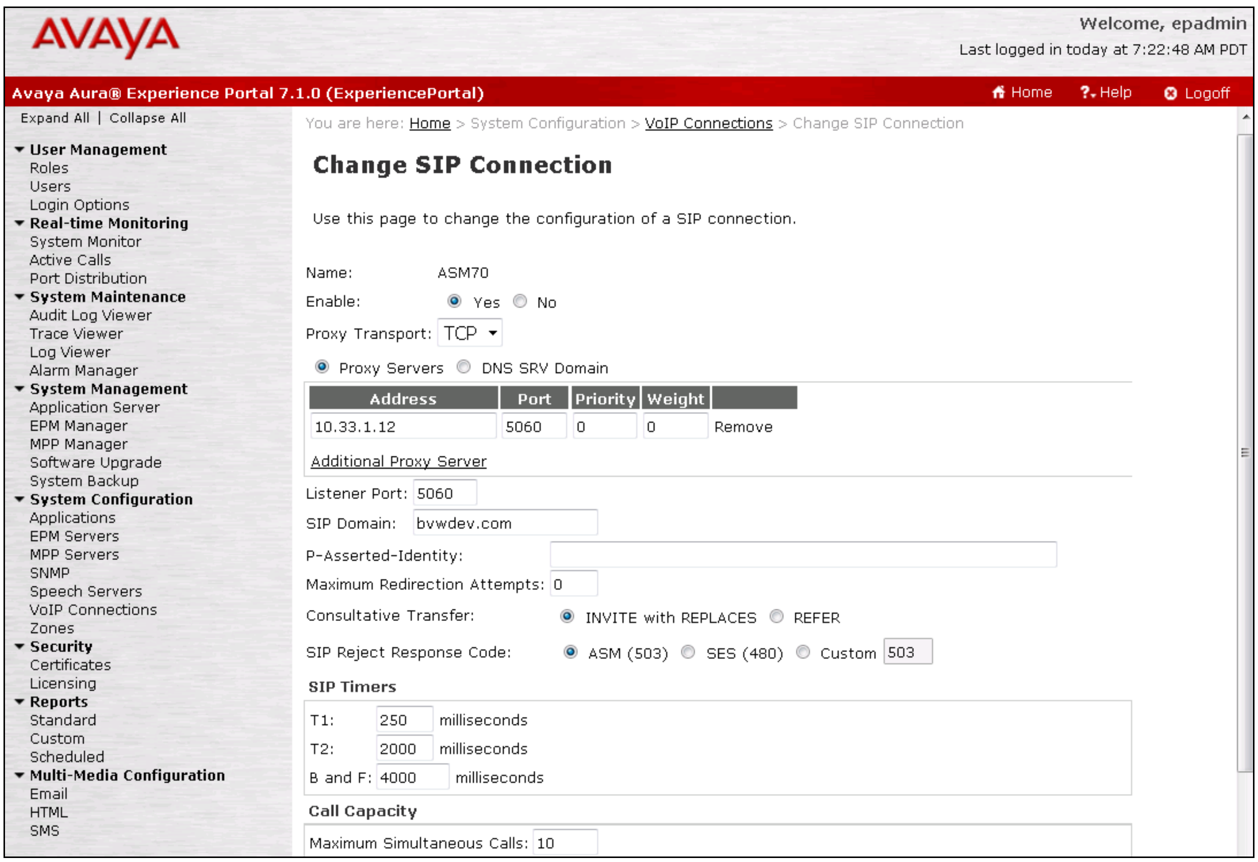
7.1. Administer VoIP Connection

On the left pane, click on the **VoIP Connections** under **System Configuration** (not shown). To add a **SIP Connection**, click on the **SIP** tab on **VoIP Connections** page (not shown).

- **Name**: Enter a descriptive name.
- **Enable**: Select "Yes" radio button.
- **Proxy Transport**: Select "TCP" if SIP connection uses TCP.
- **Proxy Servers**: Enter the SIP signaling IP address of Session Manager.
- **SIP Domain**: Enter a SIP domain "bvwdev.com" as configured in **Section 7.3**.
- In the **Call Capacity** section, enter a number of SIP call that in the **Maximum Simultaneous Calls** and select "All call can be either inbound or outbound" option. All other fields can be left at default.

Click **Save** (not shown) to save changes.



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7.2. Configure iAssist CSM Applications

CSM application is configured in Avaya Aura® Experience Portal to handle inbound calls that launch the CSM application in the iAssist server.

7.2.1. 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.

- **Name**: Enter a descriptive name, e.g. iAssist_CSM.
- **Enable**: Select **Yes**.
- **Type**: Select VoiceXML from the dropdown menu.
- **URI**: Select **Single** radio button and enter a CSM link in the VoiceXML URL.
- **Application Launch**: Select **Inbound** and add the number **4906** as configured in **Section 6.8.1.**.

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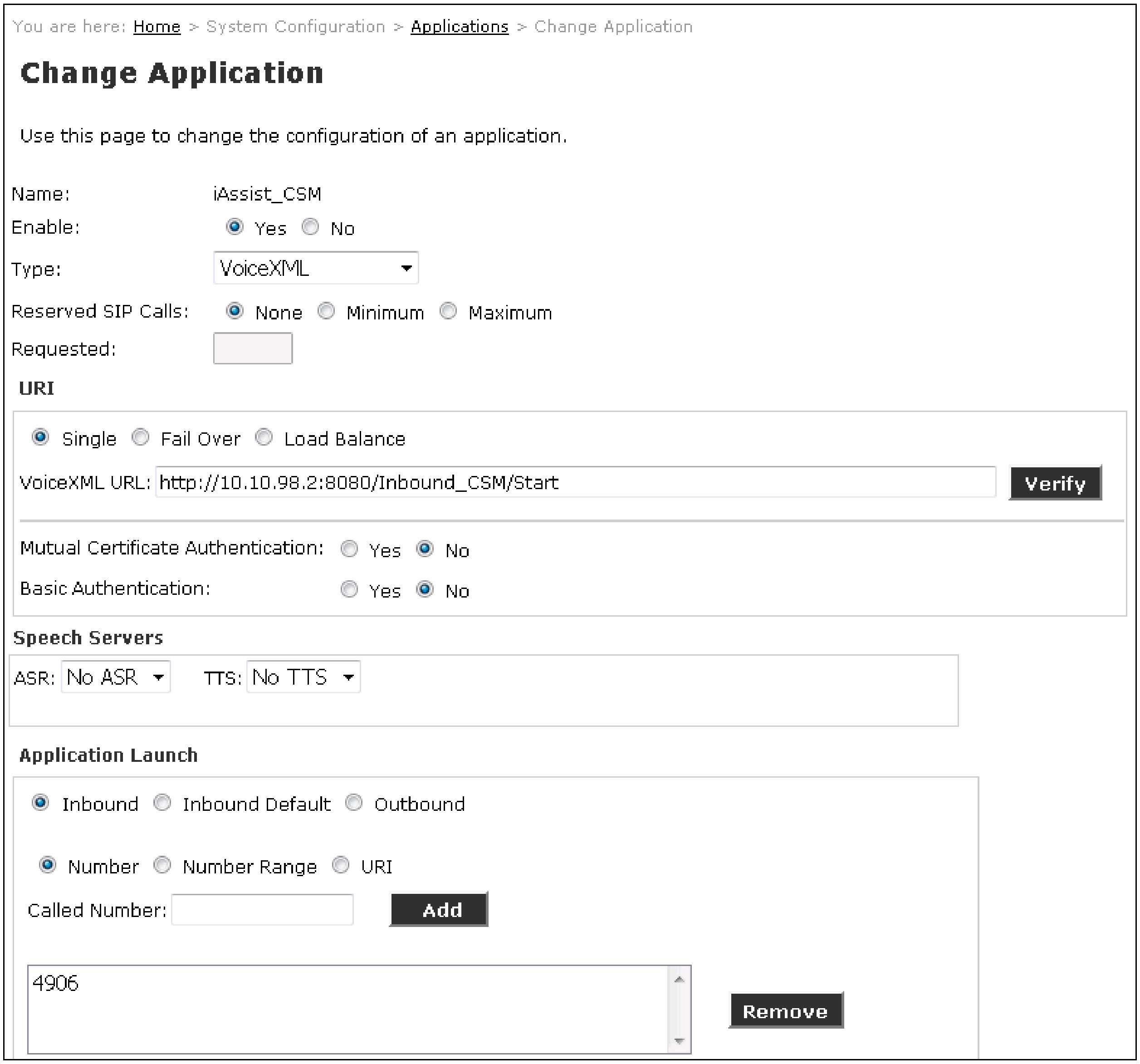

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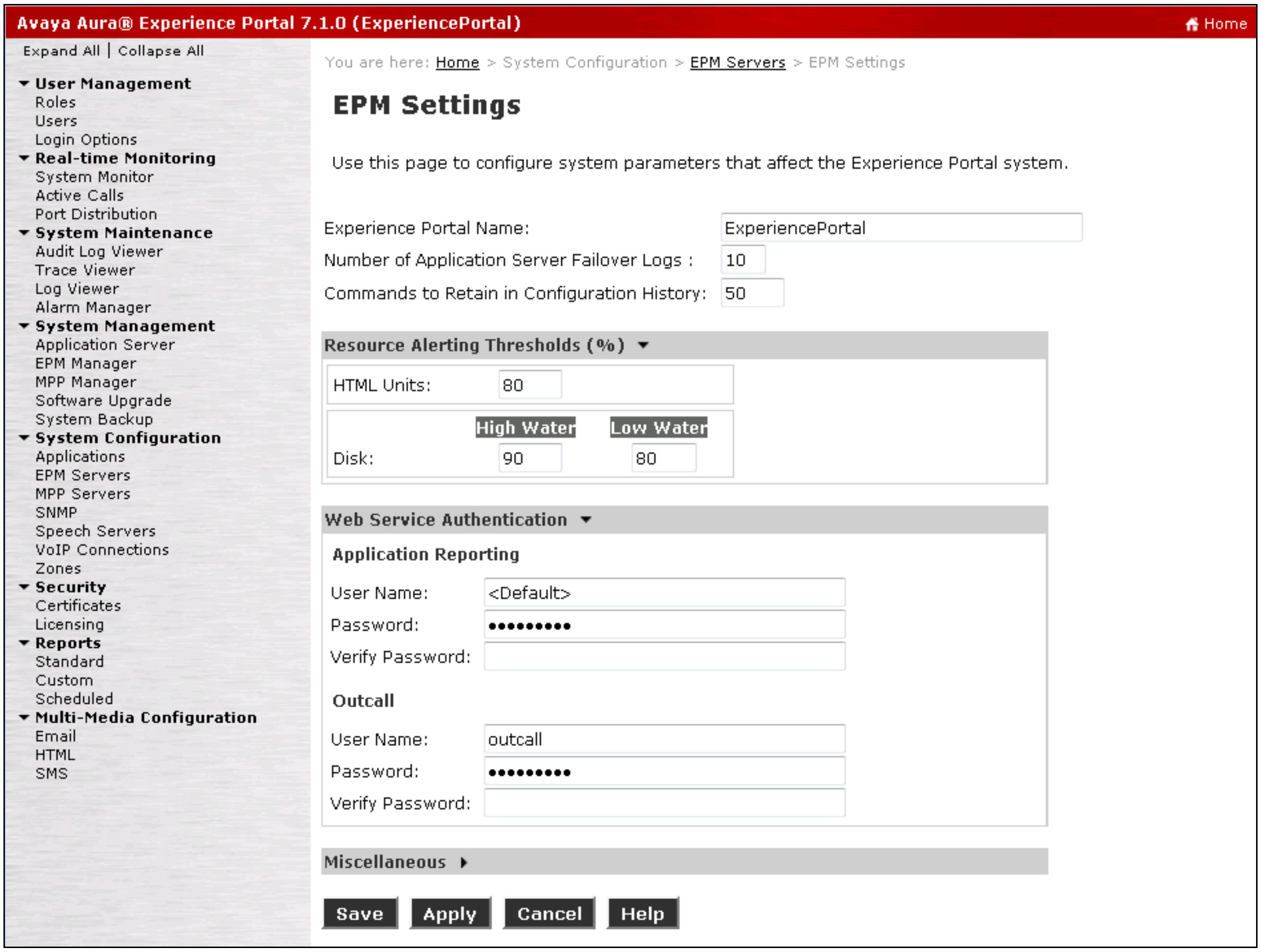
7.3. Configure the Outcall Authentication

Configure the Outcall User Name and Password that will be sent by iAssist CBM. 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 which is a sub section of **Web Service Authentication**, configure the **User Name** and **Password** used by iAssist CBM when it makes an outcall request to Experience Portal.



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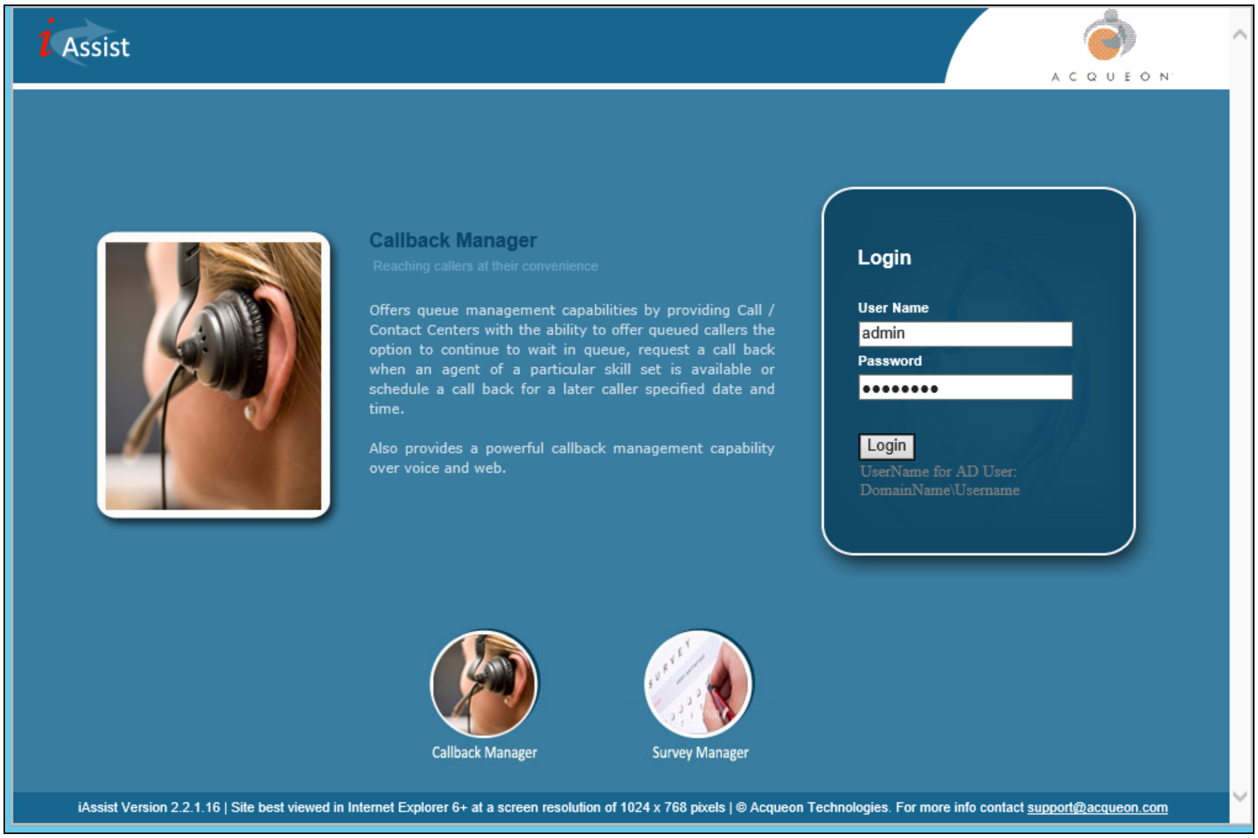
8. Configure Acqueon iAssist Call Survey Manager

The configuration of iAssist Callback Survey system is done by Acqueon engineer and is outside the scope of these Application Notes. This section covers the information on how to use the iAssist Admin application to administer the Callback Survey (CSM).

8.1. Steps to configure the Business Group

Type the URL: http://10.10.98.2/iAssist to login into the admin page followed by the **User Name** and **Password**.

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

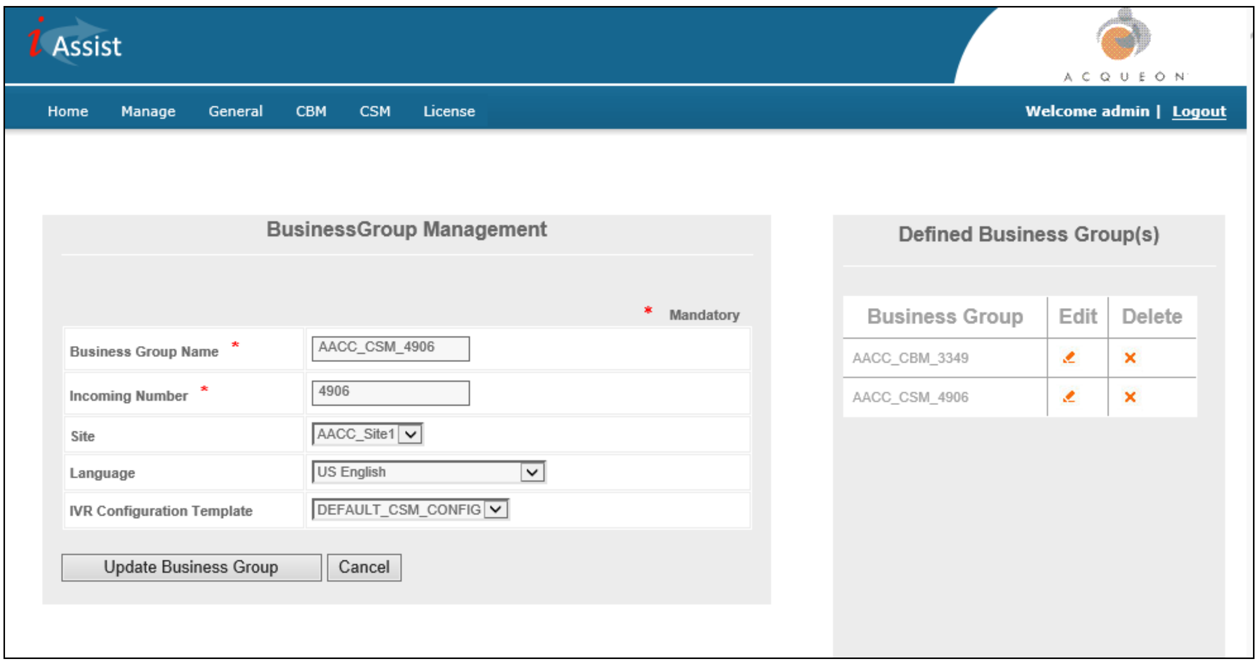


8.2. Configure the business group

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 number that routes calls to EP (e.g., 4906).
- 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**.



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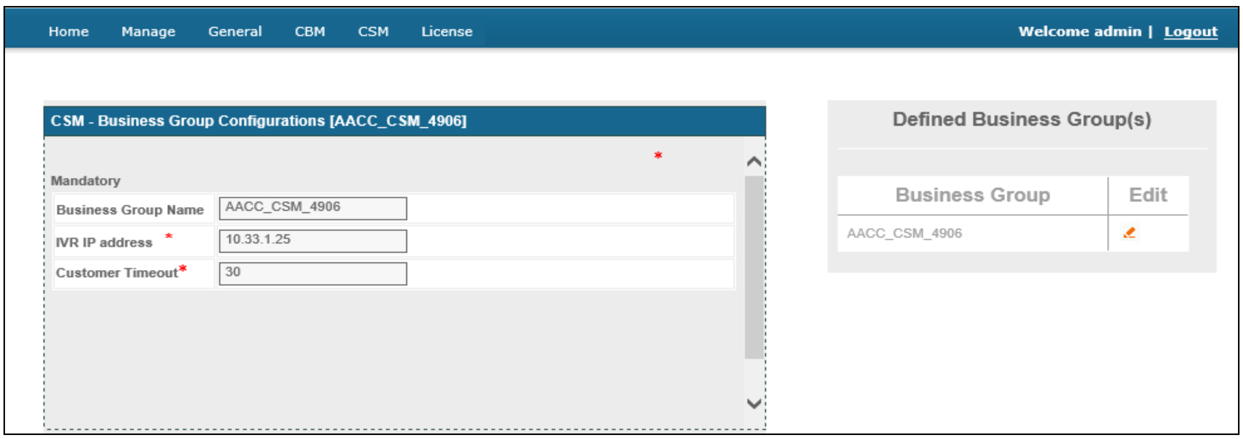
8.3. Configuring Business Group

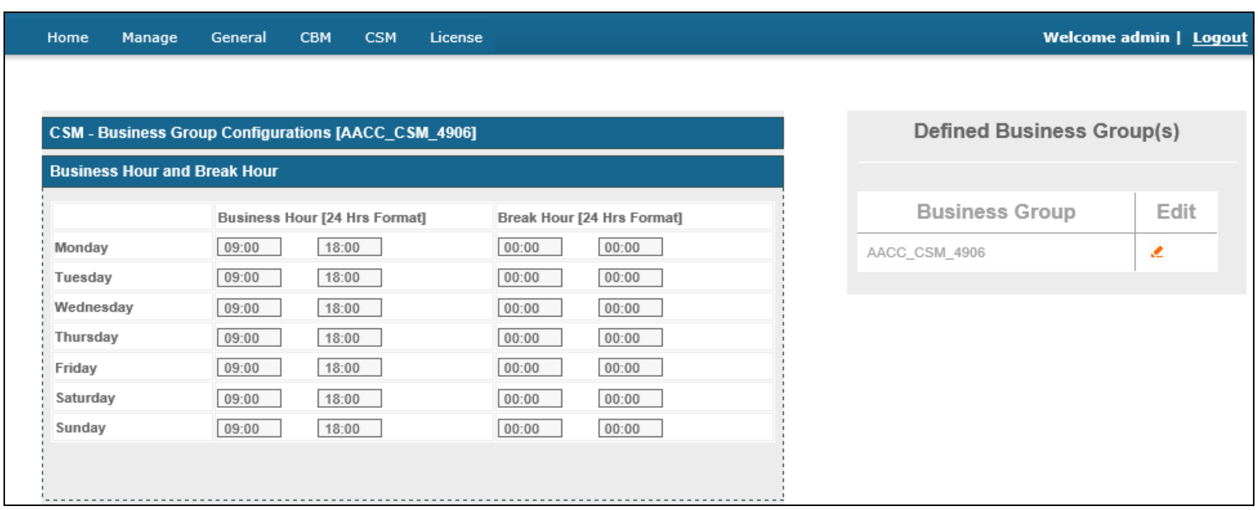
From the menu, select the **CSM → Business Group Configuration** tab. Click the **Edit** icon of the desired business group to edit the Defined Business Group(s) displayed in the right pane. The Business Group Name will be populated automatically.

- Enter a valid **Business Group Name**.
- **IVR IP Address** [Voice Portal Management System's (VPMS) IP that has been used for dialing the agent and/ or customer].
- Time Zone (not shown) (Time zone of system in which iAssist application is deployed).
- Enter **Customer Timeout** in second.



8.4. Business Hours and Break Hours

Business hours and break hours have to be configured in the **Business Hours and Break Hours** tab. It should be entered in the 24-hour format, the 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.



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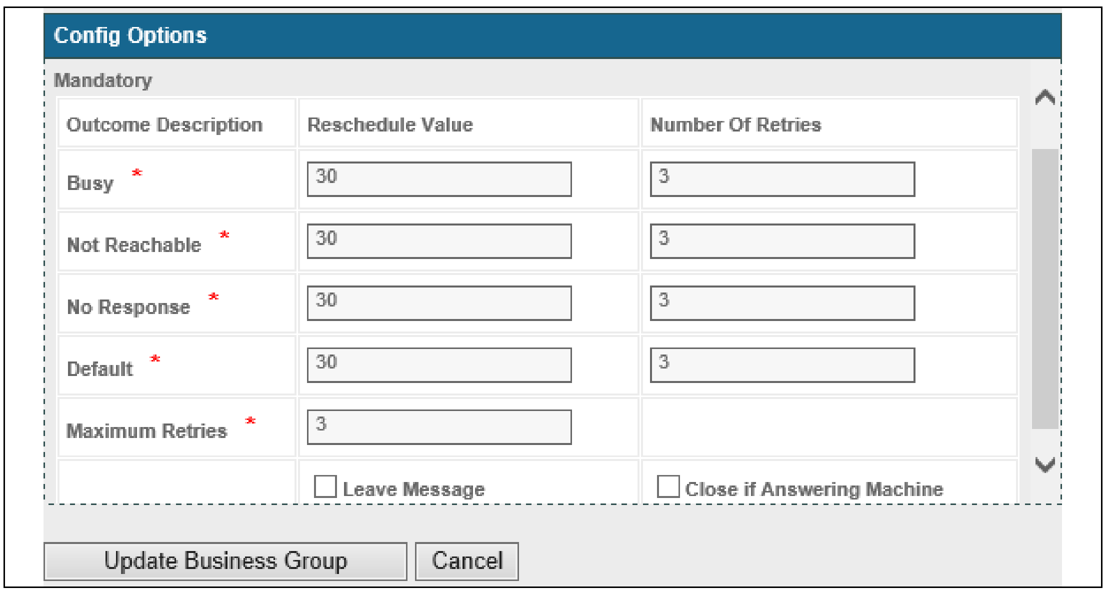
8.5. Config Options

Under the **Config Options** menu, the description of the outcome, its reschedule value and number of retries are given. 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** box if the call is diverted to the answering machine.
- By enabling this option, the contact will be closed without further retries



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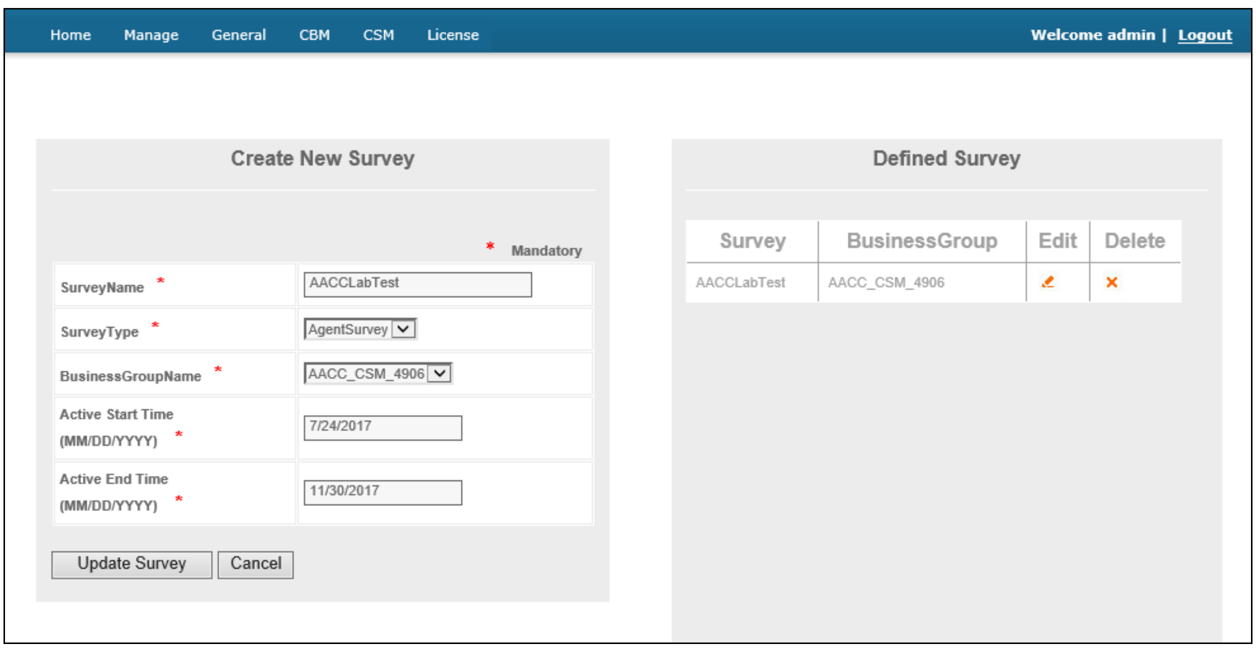
8.6. Create Call Survey

To configure the survey, in the iAssist admin home screen, click CSM Survey.

- 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.
- Enter the **Active End Time** in MM/DD/YYYY HH:MM:SS format. This is the survey end 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 call.
- However, at any given time, only one survey can be hosted for one business group



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8.7. Create Survey Questions

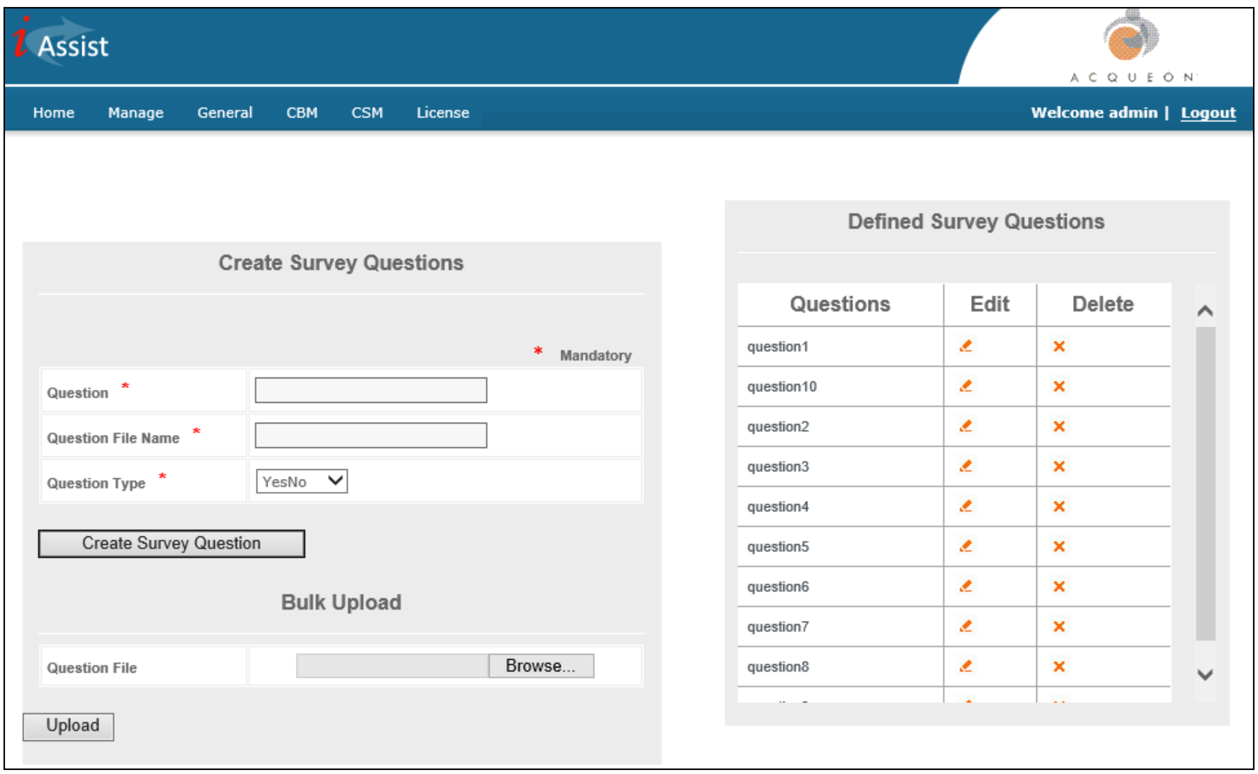
- Enter a name for the question in the **Question** field. For e.g. IVRSatisfaction, Agent Performance etc.
- Enter the audio file name of the question in the **Question File Name** field. This is the file that will be played out to the caller as a question.
- Select the **Question Type** from the dropdown 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 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.



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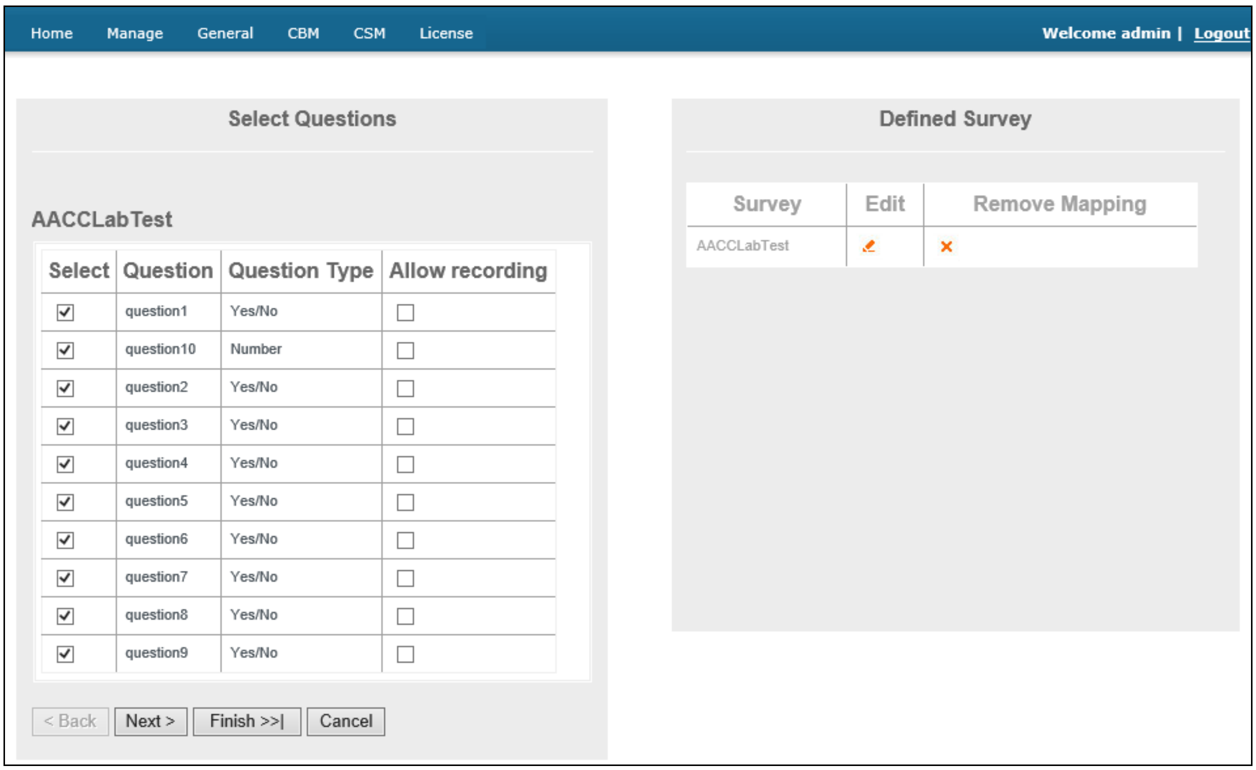
8.8. Select Questions

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. 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



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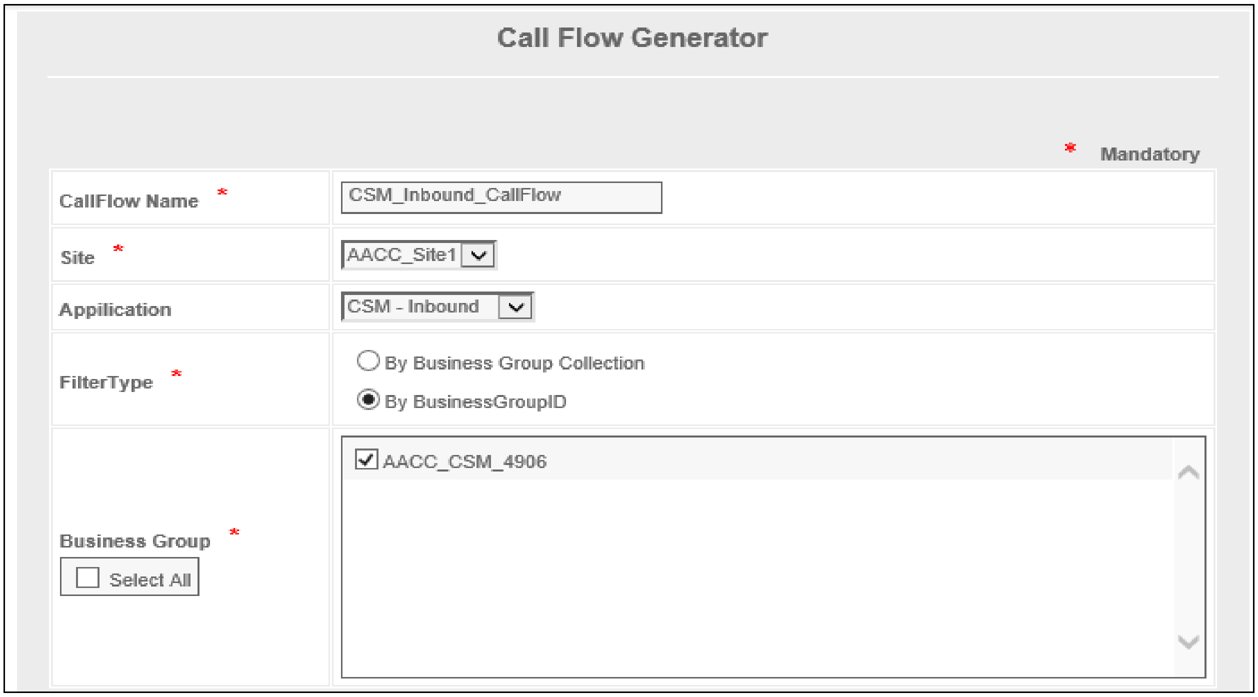
8.9. Call Flow Generating

From the main menu, select **General → CallFlow Generator**. Under this section, call flows can be generated for a business group or business group collection.

- Specify a **CallFlow Name**.
- Select the required **Site**.
- Select the desired application from the drop down list in the **Application** field.
- Select the **FilterType**.
- Select a **Business Group**.



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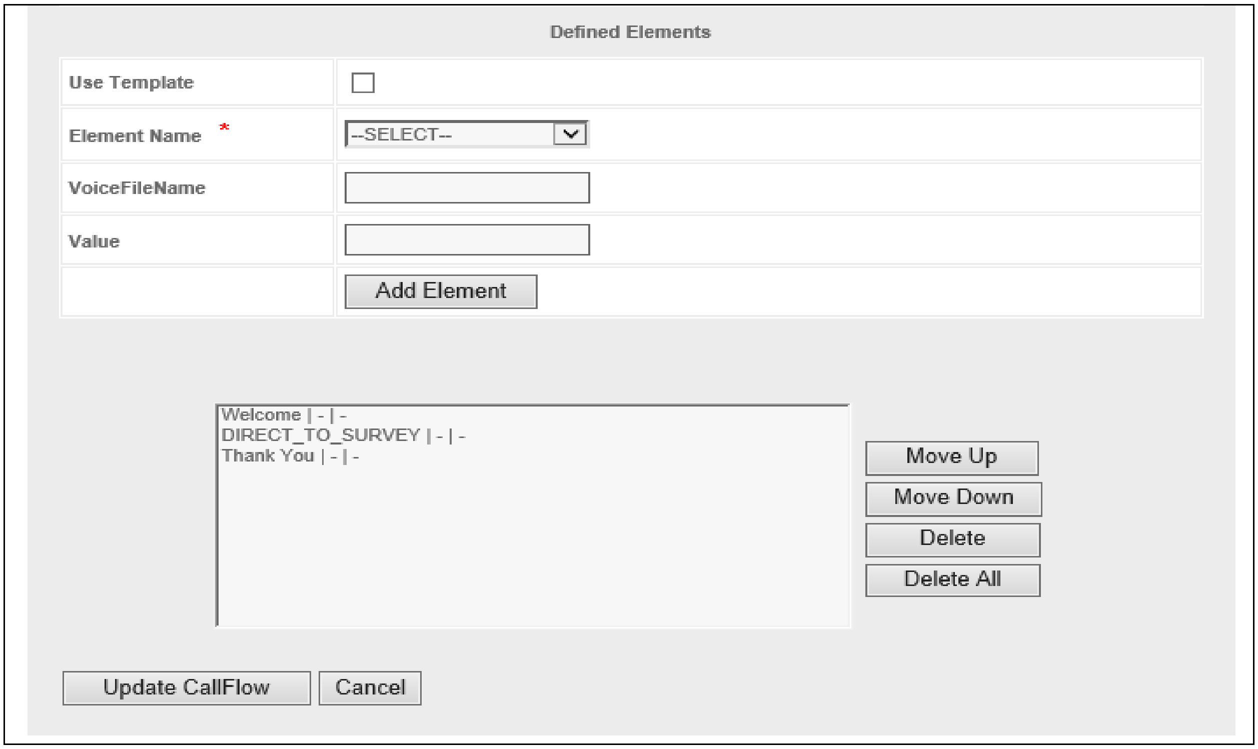
In the **Defined Elements** section, select the **Element Name** and click on the **Add Element** button to be displayed below.



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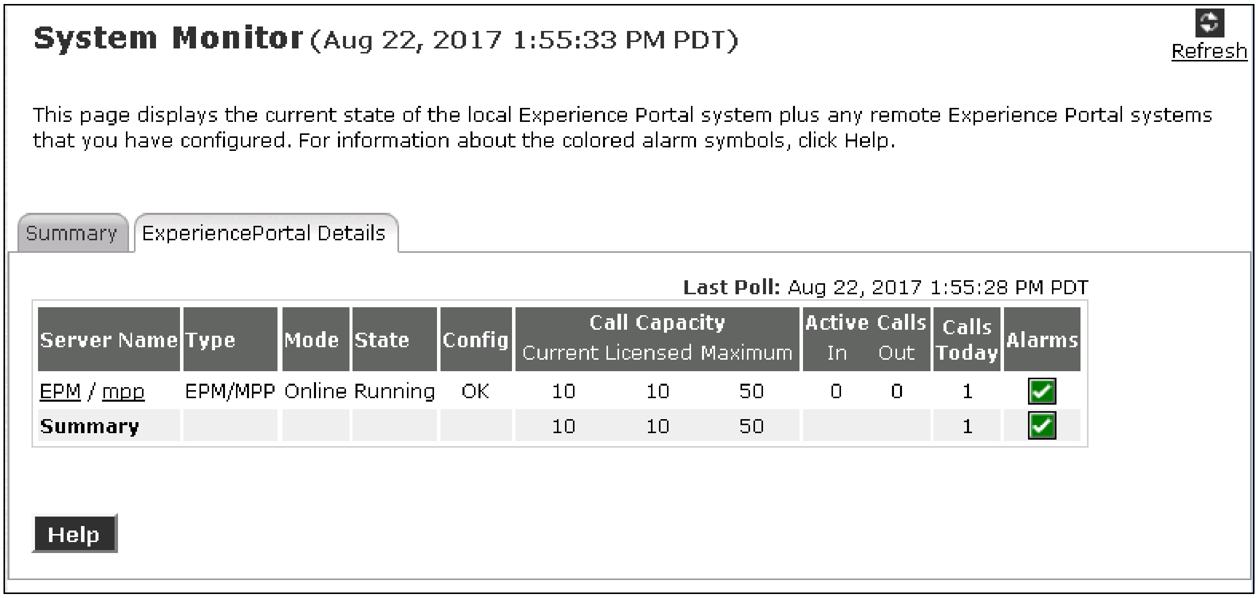
9. Verification Steps

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 Media Processing Platform (MPP) server is online and running in the **System Monitor** page shown below.



System Monitor (Aug 22, 2017 1:55:33 PM PDT)

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.

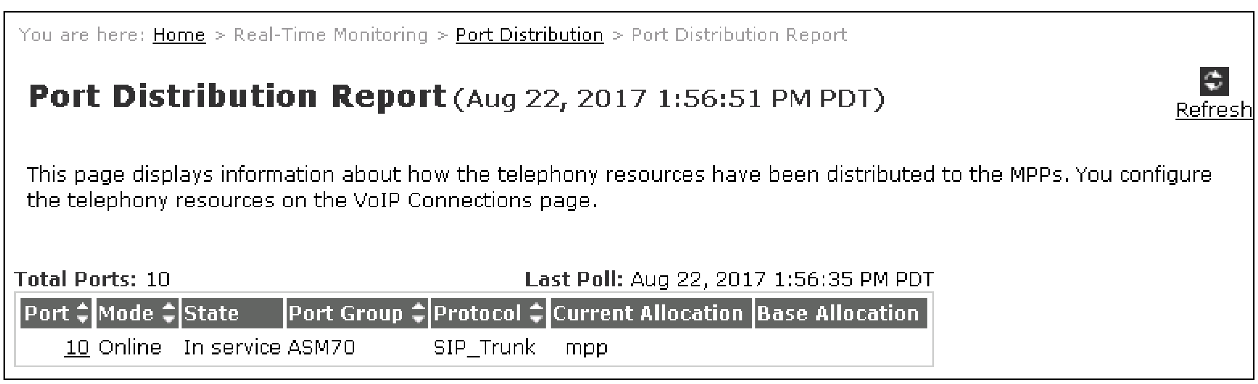
Summary | ExperiencePortal Details

Last Poll: Aug 22, 2017 1:55:28 PM PDT

Server Name	Type	Mode	State	Config	Call Capacity			Active Calls		Calls Today	Alarms
					Current	Licensed	Maximum	In	Out		
EPM / mpp	EPM/MPP	Online	Running	OK	10	10	50	0	0	1	✔
Summary					10	10	50			1	✔

Help

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



You are here: Home > Real-Time Monitoring > Port Distribution > Port Distribution Report

Port Distribution Report (Aug 22, 2017 1:56:51 PM PDT)

Refresh

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: 10 **Last Poll:** Aug 22, 2017 1:56:35 PM PDT

Port	Mode	State	Port Group	Protocol	Current Allocation	Base Allocation
10	Online	In service	ASM70	SIP_Trunk	mpp	

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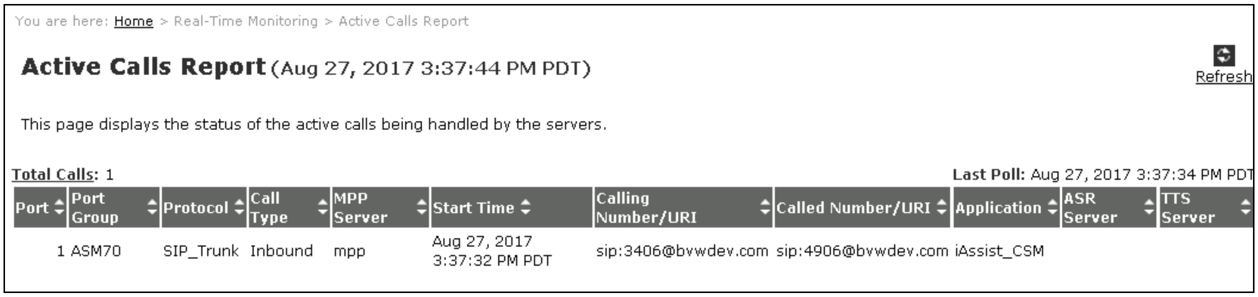
3. Place a call to 4906 which is the number configured for CSM application in Experience Portal. Navigate to **Real-Time Monitoring → Active Calls** to check the active calls being handled by Experience Portal.



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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 successfullywith any observations detailed in **Section 2.2**.

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 7.1.1, Document 03-300509, Issue 2, Aug 2017

[2] Administering Avaya Aura® Session Manager, Release 7.1.1, Issue 2, Aug 2017

[3] Administering Avaya Aura® Experience Portal, Release 7.0.1, April 2015

Product Documentation for Acqueon iAssist Callback Manager can be obtained at http://www.acqueon.com/avaya-products/iassist-for-avaya-aura-experience-portal/

[4] iAssist CSM 2.0 Admin Guide

[5] iAssist CSM 2.0 IVR Installation Guide

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