



# **Survey Assist Administration and Configuration Guide**

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# Chapter 1: Introduction

Survey Assist Solution enables the creation of surveys associated with other Avaya Products such as AES or POM. This solution provides users with a flexible and reliable way to create customized surveys for maximizing their business results. The primary purpose of this guide is to enable users to administer the Survey Solution.

---

## Definitions, acronyms, and abbreviations

**AES:** Avaya Enablement Services.

**CM:** Communication Manager.

**CTI:** Computer Telephony Integration.

**DNIS:** Dialed Number Identification Service.

**DTMF:** Dual Tone Multi Frequency (Touchtone)

**IVR:** Interactive Voice Response - The technology that simulates the behavior of a live agent.

**POM:** Proactive Outreach Manager.

**SMGR:** System Manager.

**TTS:** Text to Speech - a method of generating synthesized speech from text when pre-recorded system or custom phrases are not available.

**VDN:** Vector Directory Number - an entry extension that provides access to the programming feature on the PBX.

**VP/AAEP:** Voice Portal / Avaya Aura Experience Portal – a portal that enables callers to interact with VXML voice applications residing on a web application server.

**WEBLM:** Web License Manager.

# Chapter 2: Configuration

## Configuring SMGR

### Adding new Survey user

#### Procedure

1. Log in to System Manager (SMGR).
2. Add a new user.



Figure 1: Adding a new user

3. Add a SMGR Survey Role to that new user. Roles can be **Survey System Admin** or **Survey User**.

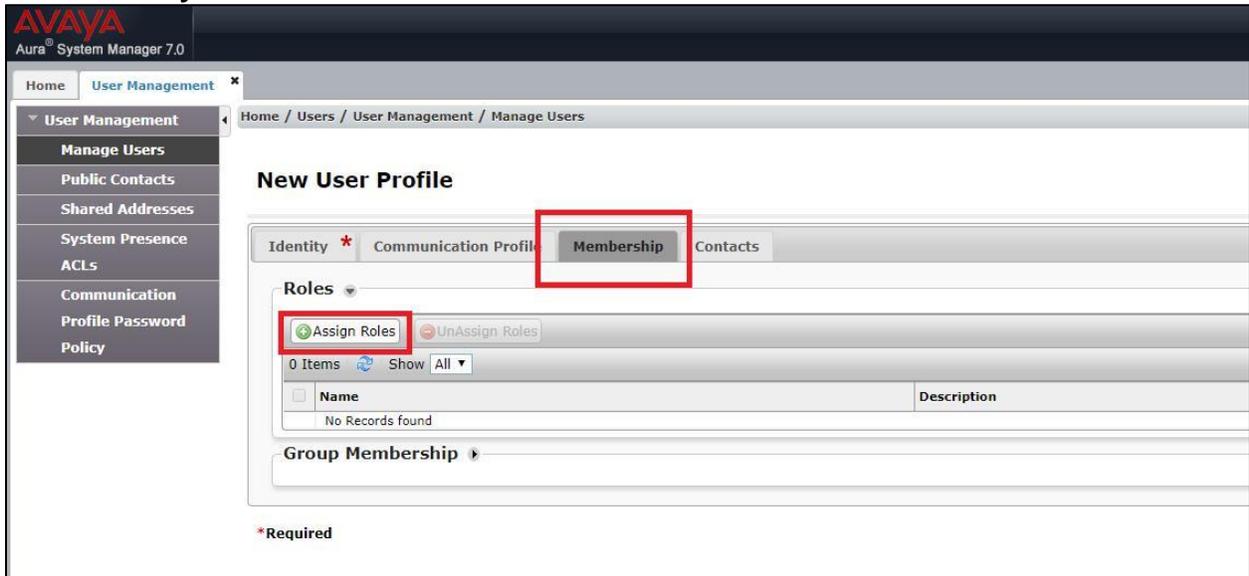


Figure 2: Assigning a role

# Create Survey System Administration users

## About this task

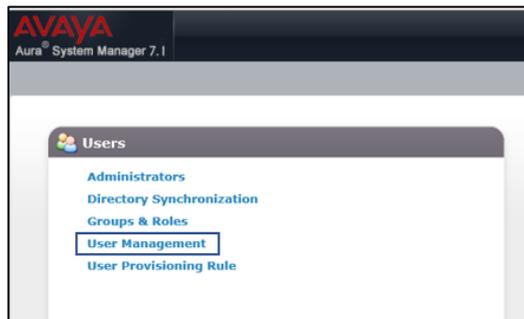
It is required to create at least one **Survey System Administrator** user, i.e. a user with the role **End User** and **Survey System Administrator**, in the System Manager. The **Survey System Administrator** has access to all the functionalities in Survey Assist and is used to add specific roles for the **Survey Users: survey viewer, survey designer** and **report** for a company or tenant.

Check the next section: **Create Survey Users**, to see how to create **Survey Users** in the **System Manager** and **Survey Assist Roles**, under the section **Configuring Survey Assist**, to assign specific roles to the **Survey Users**.

**Do not create a single user with both Survey System Administrator and Survey User roles.**

## Procedure

1. Log in to System Manager Web Interface with an Administrator user.
2. Go to **Users > User Management**, once the page has loaded click on the **manage users** link.



3. Click on the **new** button.



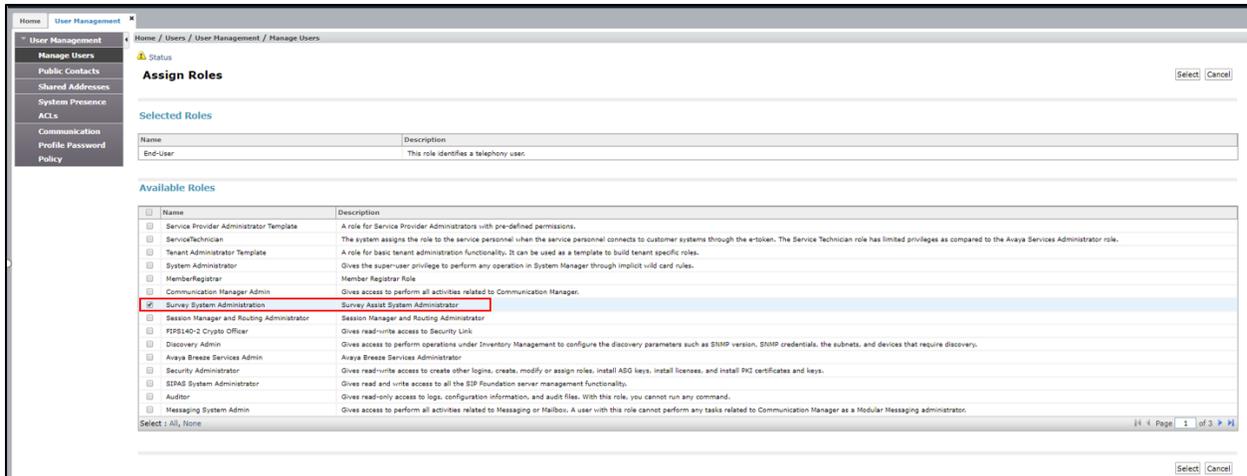
4. In the respective fields, type in the following:
  - In the field **Last Name**, type in the user last name.
  - In the field **First Name**, type in user first name.
  - In the field **Login Name**, type in the username, for example: `survuser@avaya.com`.

- In the field **Password**, type in a password.
- In the field **Confirm password** repeat the password.

5. Click on **Commit and Continue**.
6. Click on the **Membership** tab
7. Click on the **Assign Roles** button.

Name	Description
Survey User	Role to access Survey Assist
End-User	This role identifies a telephony user.

8. In the **Available Roles** select **Survey System Administration**.



9. Click on **Select**.
10. Click on **Commit and Continue**.
11. Log off the System Manager.
12. Go to the System Manager Login and click on the **Change Password** link. In the next screen type in the respective fields:
  - In the field **User ID**: the user **Login Name**, e.g: [survuser@avaya.com](mailto:survuser@avaya.com)
  - In the field **Current password**: the password to be changed.
  - In the field **New password**: the new password.
  - In the field **Confirm new password**: the new password.

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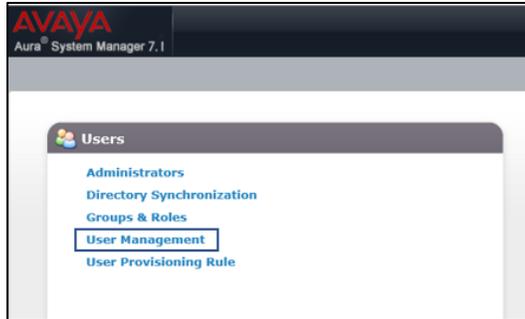
## Create Survey users

### About this task

It is required to create at least one Survey user, i.e. a user with the role **End User** and **Survey User**, in the System Manager. These users can be configured to have specific roles in Survey Assist, check **Configuring Survey Assist** for details on how to add the roles.

### Procedure

1. Log in to System Manager Web Interface with an Administrator user.
2. Go to **Users > User Management**, once the page has loaded click on the **manage users** link.

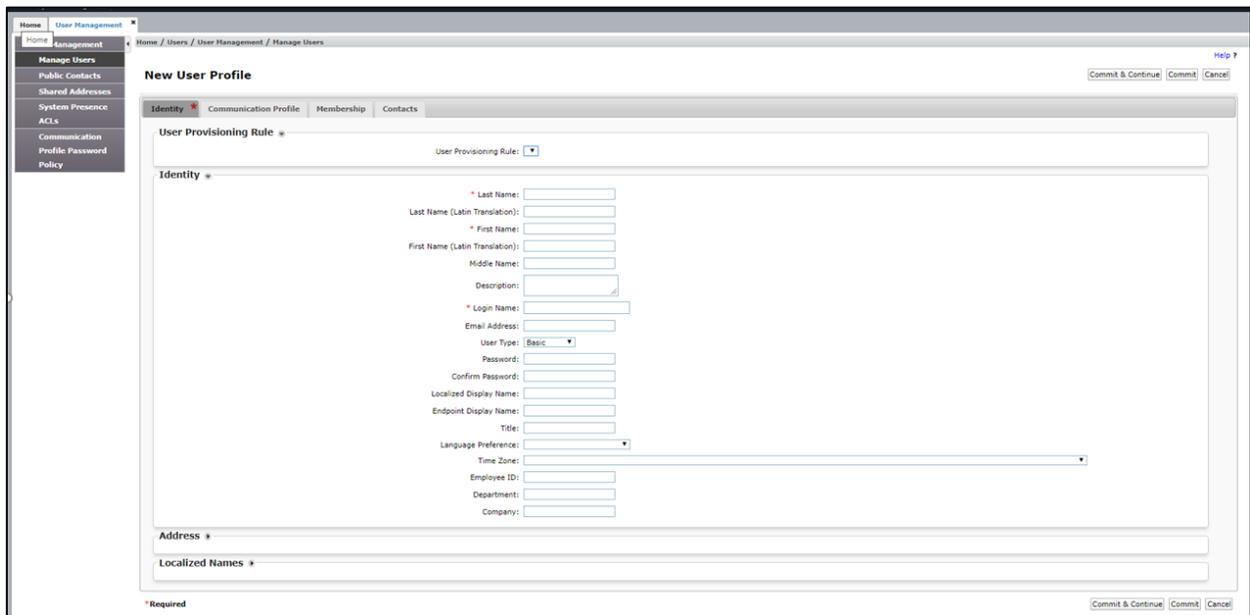


3. Click on the **new** button.



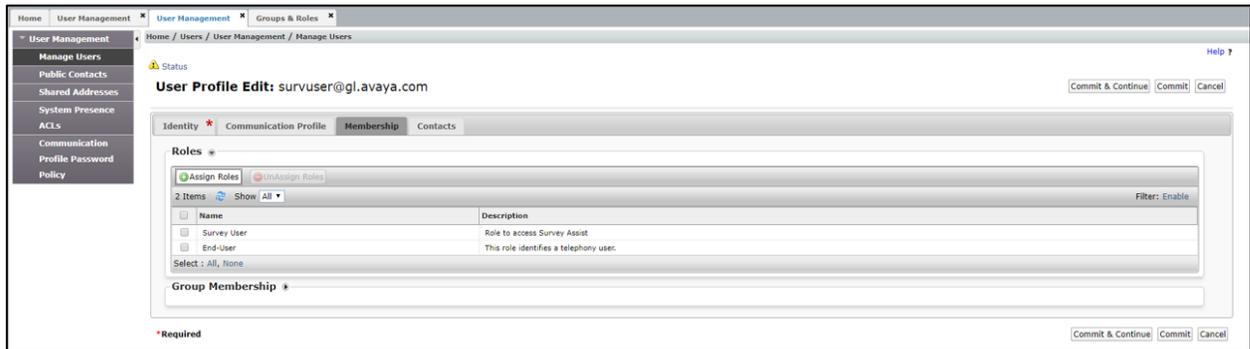
4. In the respective fields, type in the following:

- In the field **Last Name**, type in the user last name.
- In the field **First Name**, type in user first name.
- In the field **Login Name**, type in the username, for example: survuser@avaya.com.
- In the field **Password**, type in a password.
- In the field **Confirm password** repeat the password.

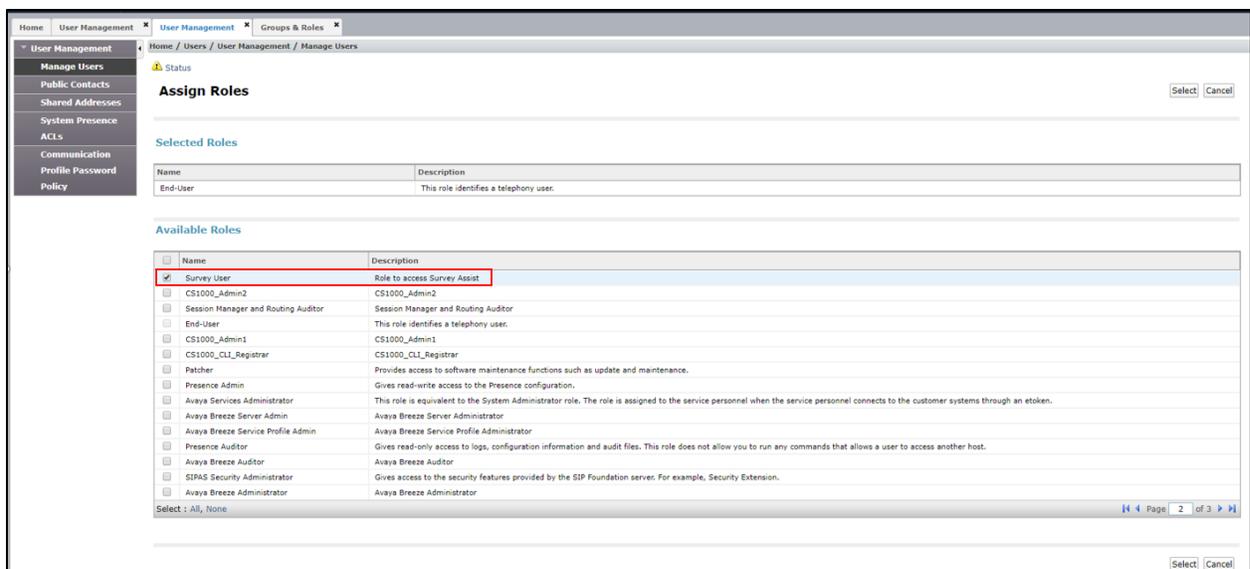


5. Click on **Commit and Continue**.

6. Click on the **Membership** tab
7. Click on the **Assign Roles** button.



8. In the **Available Roles** select **Survey User**.



9. Click on **Select**.
10. Click on **Commit and Continue**.
11. Log off the System Manager.
12. Go to the System Manager Login and click on the **Change Password** link. In the next screen type in the respective fields:
  - In the field **User ID**: the user **Login Name**, e.g: [survuser@avaya.com](mailto:survuser@avaya.com)
  - In the field **Current password**: the password to be changed.
  - In the field **New password**: the new password.
  - In the field **Confirm new password**: the new password.

---

# Configuring AAEP

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## Configuring POM Application

### Procedure

1. Access Avaya Aura Experience Portal (AAEP) and create a new application using the following information:
  - a. Application Type: POM Application
  - b. VoiceXML URL:
    - SingleBox :
      - `https://<IP>:9180/od-voice-pom-plugin/Start`
    - Cluster (Single, Failover or Load Balancer Configuration):
      - `https://<IP_NODE_1>:31000/od-voice-pom-plugin/Start`
      - `https://<IP_NODE_2>:31001/od-voice-pom-plugin/Start`
  - c. Application Launch: Outbound
    1. Access Proactive Outreach Manager (POM).
    2. POM Campaign must be set to launch the recently created application by using POM Strategy.
    3. The campaign name given in POM must be used as an Integration POM name when you create the Survey.

---

## Configuring Standalone Application

### Procedure

1. Access Avaya Aura Experience Portal (AAEP) and create a new application with the following information:
  - a. Application Type: VoiceXML
  - b. VoiceXML URL:
    - SingleBox :
      - `https://<IP>:9180/od-voice-standalone-plugin/Start`
    - Cluster (Single, Failover or Load Balancer Configuration):
      - `https://<IP_NODE_1>:31000/od-voice-standalone-plugin/Start`
      - `https://<IP_NODE_2>:31001/od-voice-standalone-plugin/Start`
  - c. Application Launch: Inbound Default or any given DNIS

- d. Advanced Parameters:
  - o Operation Mode: Shared UII

---

## Configuring Oceana Application

### Procedure

1. Open Avaya Aura Experience Portal (AAEP) and create a new application using the following information:
  - a. Application Type: VoiceXML
  - b. VoiceXML URL:
    - o SingleBox :
      - `https://<IP>:9180/od-voice-oceana-plugin/Start`
    - o Cluster (Single, Failover or Load Balancer Configuration):
      - `https://<IP_NODE_1>:31000/od-voice-oceana-plugin/Start`
      - `https://<IP_NODE_2>:31001/od-voice-oceana-plugin/Start`
  - c. Application Launch: Inbound Default or any given DNIS.
  - d. Advanced Parameters:
    - o Operation Mode: Shared UII

- **Important:**

When integrating with Oceana by using Return Destination functionality (instead of the Avaya Breeze snap-in), you must configure a Disconnect VDN to avoid looping, after the survey is completed. This is achieved by adding the “disconnectVdn” parameter to the Oceana plug-in URL; the value depends on the disconnect VDN you have configured. Example:

```
https://<IP>:9180/od-voice-oceana-plugin/Start?disconnectVdn=1003
```

---

## Configuring SMS POM Application

### Procedure

2. Access Avaya Aura Experience Portal (AAEP) and create a new application with the following information:
  - o Inbound SMS
    - a. Application Type: SMS
    - b. VoiceXML URL:

- SingleBox :
  - `https://<IP>:9181/od-sms-pom-plugin/Start`
  - 1. Cluster (Single, Failover or Load Balancer Configuration):
    - `https://<IP_NODE_1>:31100/od-sms-pom-plugin/Start`
    - `https://<IP_NODE_2>:31101/od-sms-pom-plugin/Start`
- c. Application Launch: Inbound Default
- Outbound SMS
  - d. Application Type: SMS
  - e. VoiceXML URL:
    - 1. SingleBox :
      - `https://<IP>:9181/od-sms-pom-plugin/Start`
    - 2. Cluster (Single, Failover or Load Balancer Configuration):
      - `https://<IP_NODE_1>:31100/od-sms-pom-plugin/Start`
      - `https://<IP_NODE_2>:31101/od-sms-pom-plugin/Start`
  - f. Application Launch: Outbound
  - g. Notification Enabled: Yes
  - h. Notification URL:
    - 1. SingleBox :
      - `https://<IP>:9181/od-sms-pom-plugin/Start`
    - 2. Cluster:
      - `https://<IP_NODE_1>:31100/od-sms-pom-plugin/Start`
    - 3. Access POM.
    - 4. POM Campaign must be set to launch the Outbound SMS application.
    - 5. The campaign name given in POM must be used as an Integration POM name when creating the Survey.

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## Configuring Survey Assist

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## System Manager Roles

There are two different roles that are defined within SMGR:

- **Survey System Administrator:** Super user for Survey Assist. Can perform CRUD operations on all entities and has access to all Companies.
- **Survey User:** Basic permission for a user to use Survey Assist.

---

## Survey Assist Roles

There are defined roles within Survey Assist. These roles are defined on a Company and/or Tenant level. Users/roles defined on a Company Level are automatically inherited by each of its Tenants except for the Survey Company Administrator. This exception does not carry over to the Tenants.

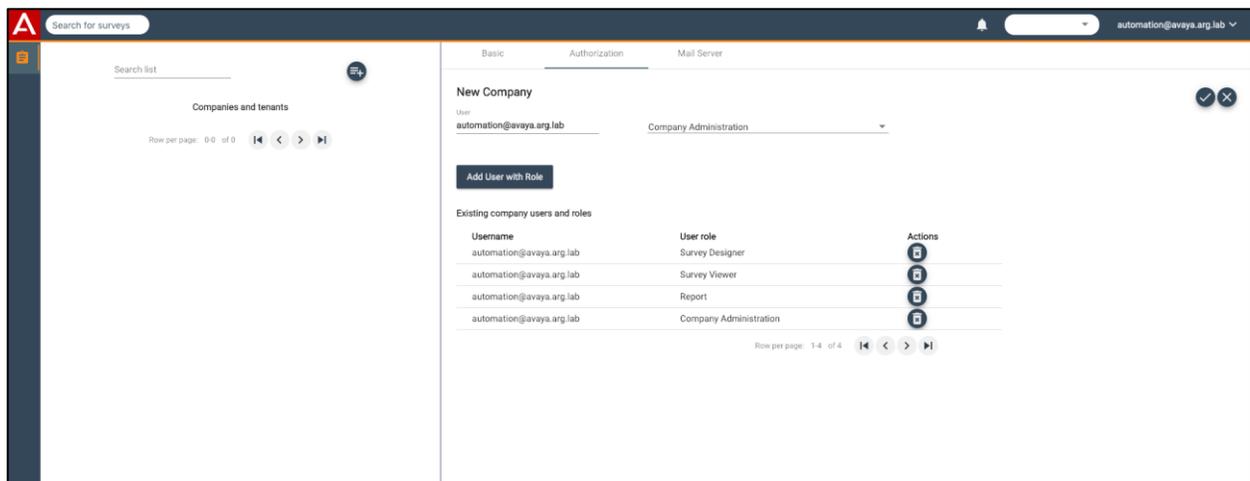
- **Survey Company Administrator:** Has access to the Company global configuration and all the Tenants within that Company.
- **Survey Designer:** Can perform CRUD operations on all Surveys from their Company or Tenant.
- **Survey Viewer:** Can only view Surveys that belong to the Company or Tenant.
- **Survey Report Viewer:** Can only access the Survey Reports for their Company or Tenant's Surveys.

---

## Creating a Company

### Procedure

1. Open the Survey Assist Web Page by using `https://<IP>/#`
2. Click the Multi tenancy button and add a Company.



**Figure 3: Adding a Company and user roles**

3. Fill in all the mandatory fields:
  - a. **Name**

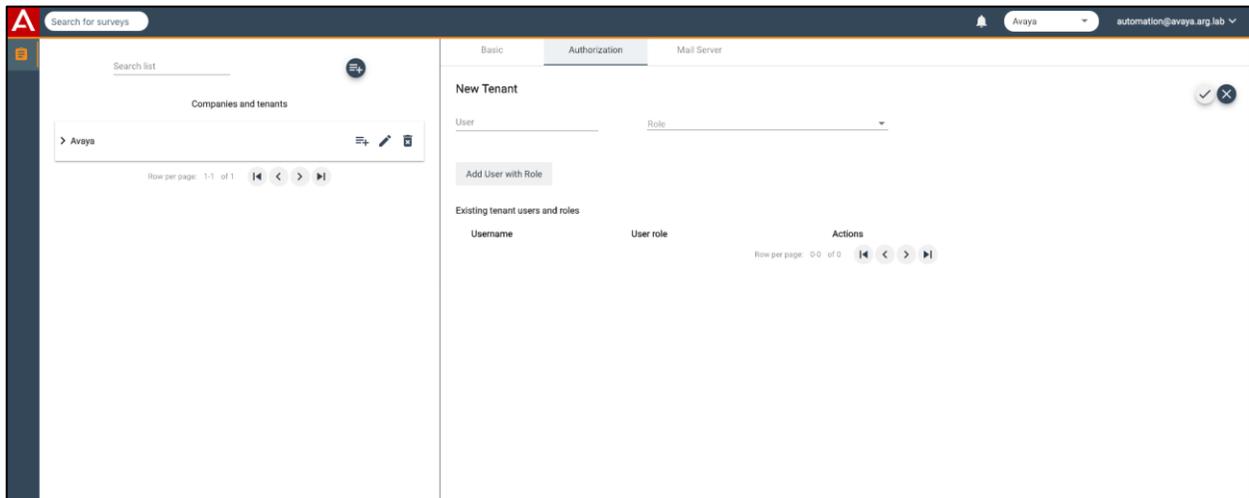
- b. **Number of Voice Licenses**
  - c. **Number of Digital Block Licenses**
- 4. Optionally, for users that are not administrators, go to the Authorization tab.  
**Add Users from SMGR and assign them roles:**  
Type in the **user** field the **Survey User** name created in the System Manager, e.g: [surveyviewer@avaya.com](mailto:surveyviewer@avaya.com), and select a role in role selector.
- 5. If you plan to use the Notification email functionality, in the Mail Server tab configure the information related to the email server:
  - a. **Address**
    - a. **Port**
    - b. **Username**
    - c. **Password** (if required)
    - d. **From** (the default sender for the emails)
    - e. **Transport**
    - f. **Proxy information** (if required)
- 6. For Data Privacy purposes, audio recorded comments and Contact Numbers are not stored with survey results by default. This can be modified in the Private Data tab:
  - a. Enable **ANI is stored with the survey results**, if you want to keep the Contact Number with the Company's surveys results
  - a. Enable **Voice comments are stored with the survey results**, if you want to keep the voice recorded comments with the Company's surveys results
- 7. Save the Company.

---

## Creating a Tenant

### Procedure

1. Access the Multi-tenancy option in the left-side menu.
2. Hover the cursor over the Company you want to add a Tenant to and click **Add Tenant**



**Figure 4: Adding a tenant**

3. Complete all the mandatory fields such as:
  - a. **Name**
4. Optionally, for users that are not administrators, go to the Authorization tab
  - a. **Add Users from SMGR**
  - b. **Add Roles for such users**

Users added at a company level will automatically have the same permissions in all the Company's Tenants.
5. If you plan to use the Notification email functionality, in the Mail Server tab configure the information related to the email server:
  - a. Enable **Override Company Configuration** if you want to override the Company's configuration
  - b. **Address**
  - c. **Port**
  - d. **Username**
  - e. **Password** (if required)
  - f. **From** (the default sender for the emails)
  - l. **Transport**
  - g. **Proxy information** (if required)
6. If you want to override the Private Data configuration defined at the Company level, you can go to the Private Data tab:
  - a. Enable **Override Company Configuration** if you want to override the Company's configuration
  - b. Enable **ANI is stored with the survey results**, if you want to keep the Contact Number with the Tenant's surveys results

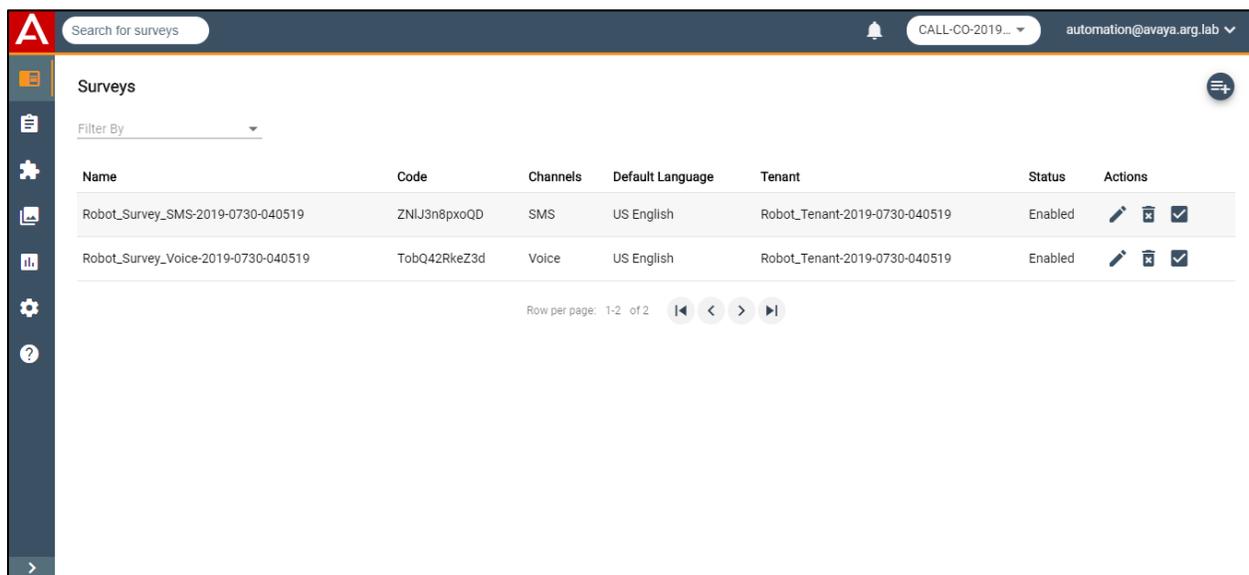
- c. Enable **Voice comments are stored with the survey results**, if you want to keep the voice recorded comments with the Tenant's surveys results
- 7. Save the Tenant.

# Chapter 3: Creating a Survey

## Basic Tab

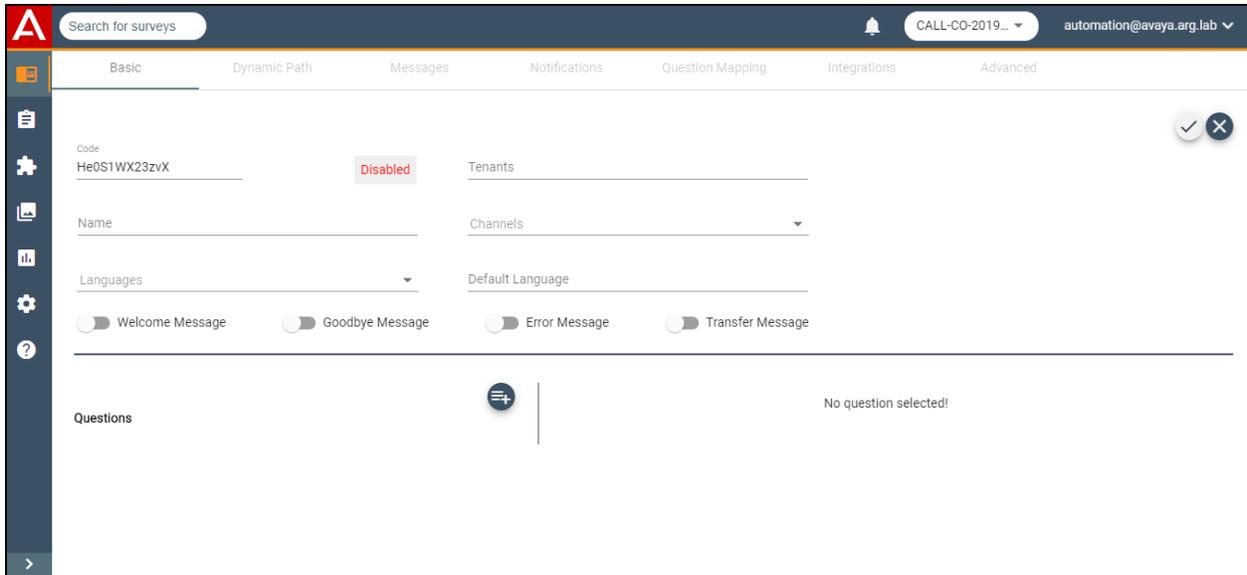
### Procedure

1. Open the Survey Assist Web Page by using the following: `https://<IP>/#/`
2. Click **Surveys** icon  on the left menu bar.



**Figure 5: Surveys**

- a. For searching purposes, use the **Filter By** feature and choose between Name, Code or Tenant options.
  - b. Click **Search** 
3. Click **Add Survey** button 



**Figure 6: Fields**

4. Complete all the mandatory fields:

- a. **Name** (Survey's name)
- b. **Languages** (The system displays a list in which multiple languages can be selected.)
- c. **Tenants** (The system displays a list with all the existing Tenants in the Company.)
- d. **Channels** (The system displays a list with all the available channels. Multiple channels can be selected.)
- e. **Default Language** (The system displays a list with all the selected languages for that Survey. Only one language will be the default language.)
- f. **Toggle Survey Messages** (The system displays messages such as Welcome, Goodbye, Error and Transfer Message according to your selection.)

- **Note:**

For Voice, it reproduces the Transfer Message and performs a transfer to the Transfer Destination of the Integration which triggered it.

For SMS, it sends the Transfer Message and ends the call.

5. Add questions by clicking **New Question** button 

- a. Select the question type from the presented list and fill up the mandatory fields.



**Figure 7: Question types**

- b. Click the **Add Question** button when finished.
6. Save the Survey by clicking the tick mark icon. 

---

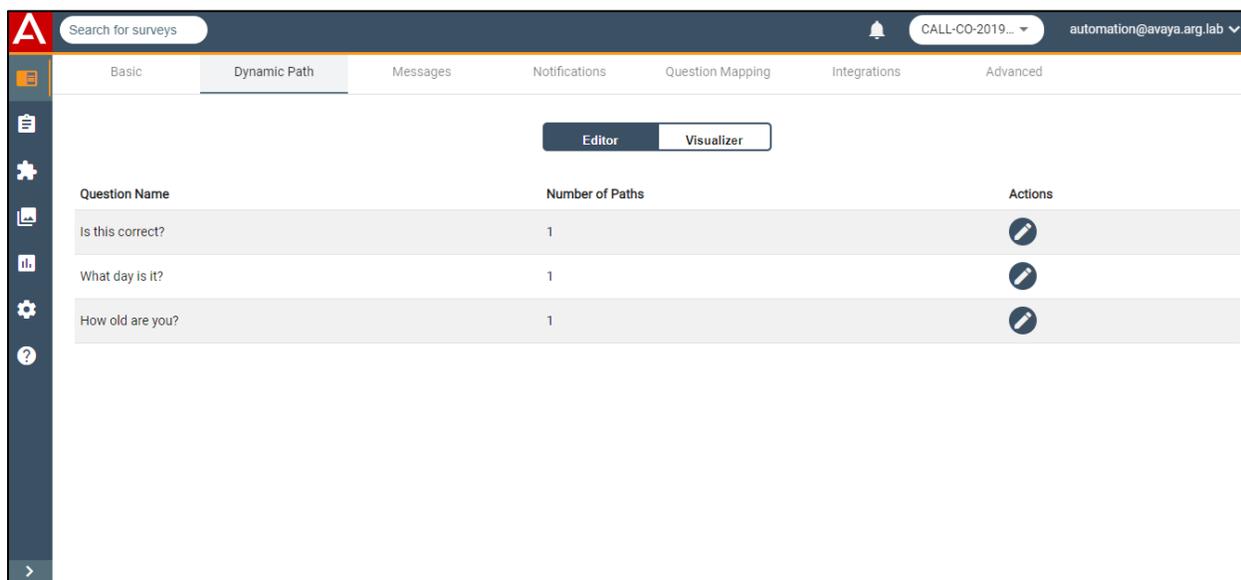
## Dynamic Path Tab

### About this task

Gives the ability to define different Survey flows based on the previous questions answer.

### Procedure

- 1. Click the **Dynamic Path** tab.
  - a. In the **Editor** mode, you can configure the Survey flow



**Figure 8: Editor mode in Dynamic Path tab**

- b. In the **Visualizer** mode, you can see your Survey flow graphically.

- **Note:**

If needed, you can drag elements for a better look.

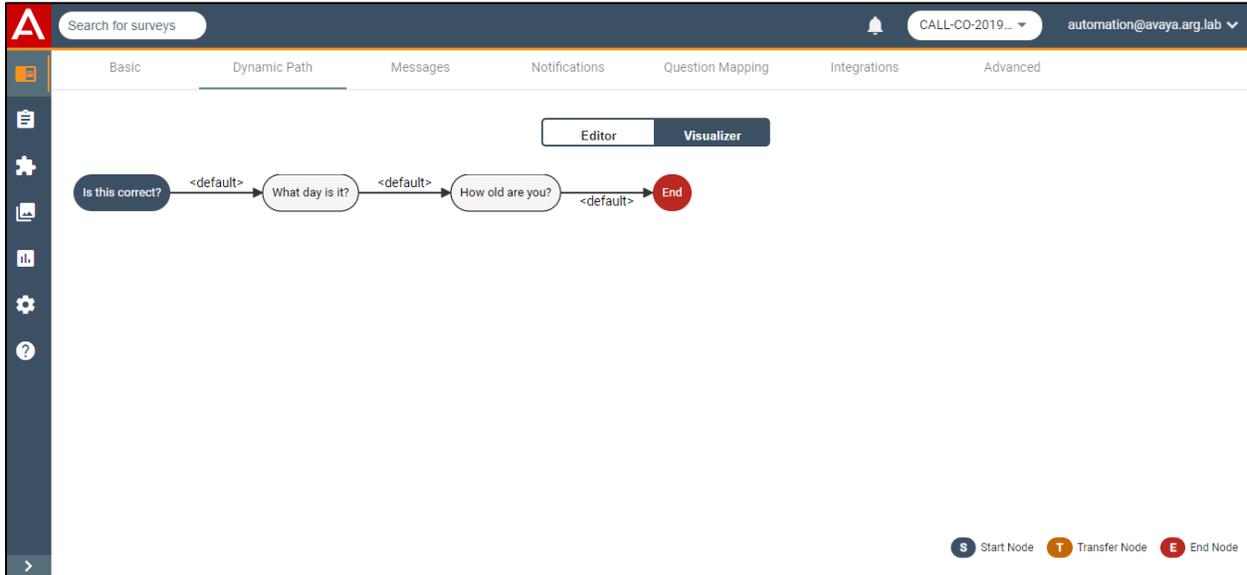


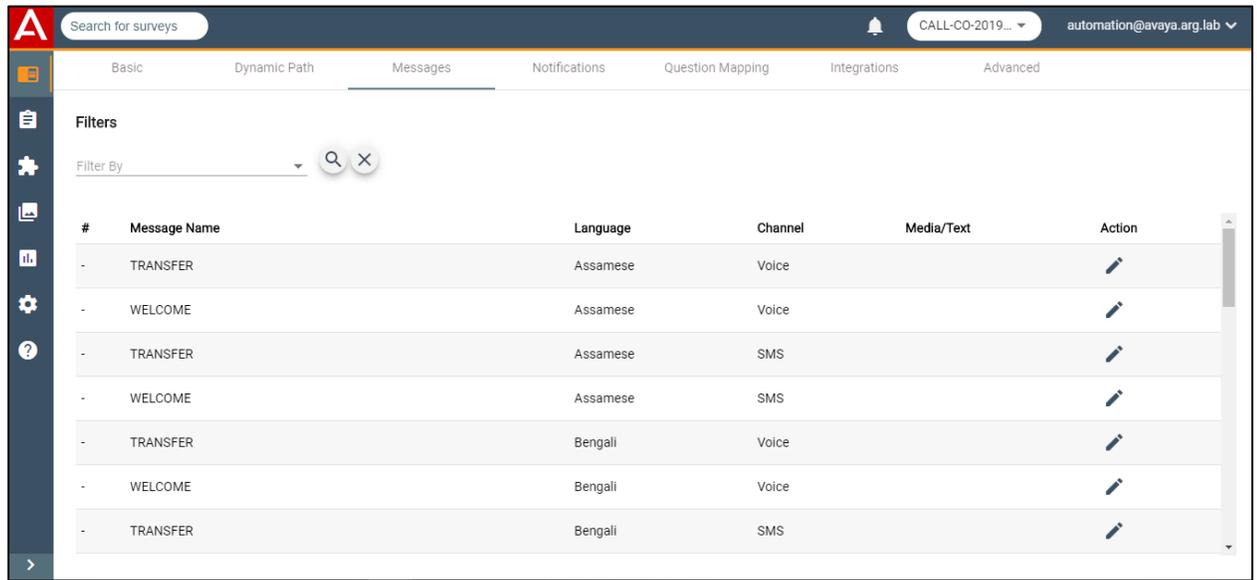
Figure 9: Visualizer mode in Dynamic Path

---

## Messages Tab

### Procedure

1. Messages are shown depending on the filters applied. Use the **Filter By** feature (Type, Language and/or Channel) to list all or any available message or question.

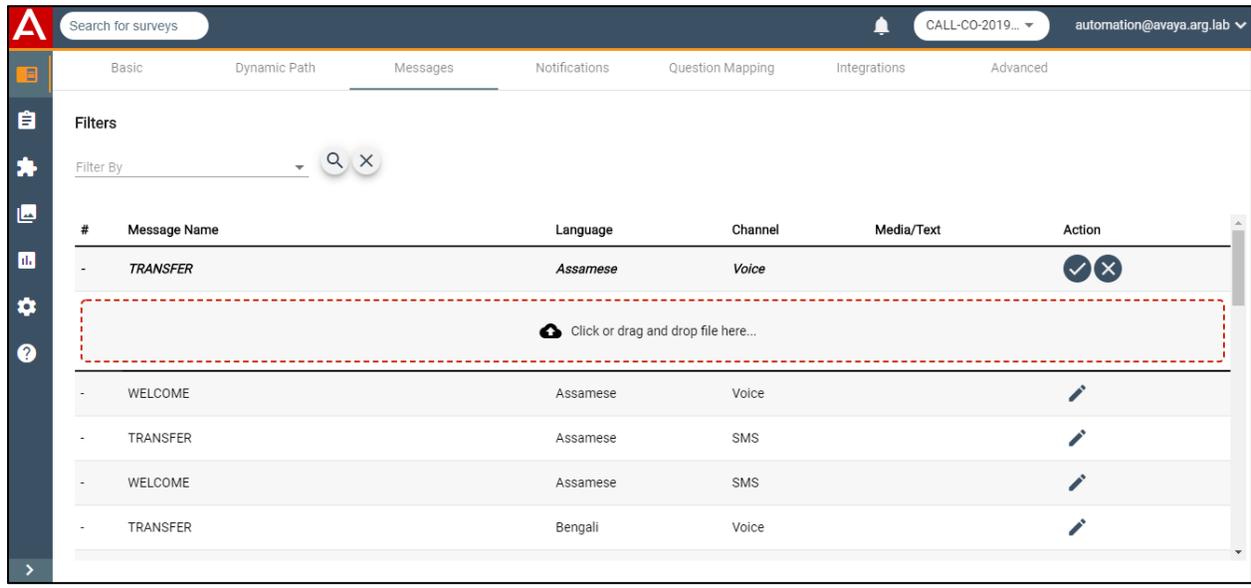


**Figure 10: Selecting filters**

2. Click the pencil icon  to configure a Voice Message. You can drag and drop the audio or open it by using a browser.

Audio file supported format	WAV, 8 or 16 bits, 8 kHz, mono
-----------------------------	--------------------------------

3. Click **Save** .



**Figure 11: Drag and drop**

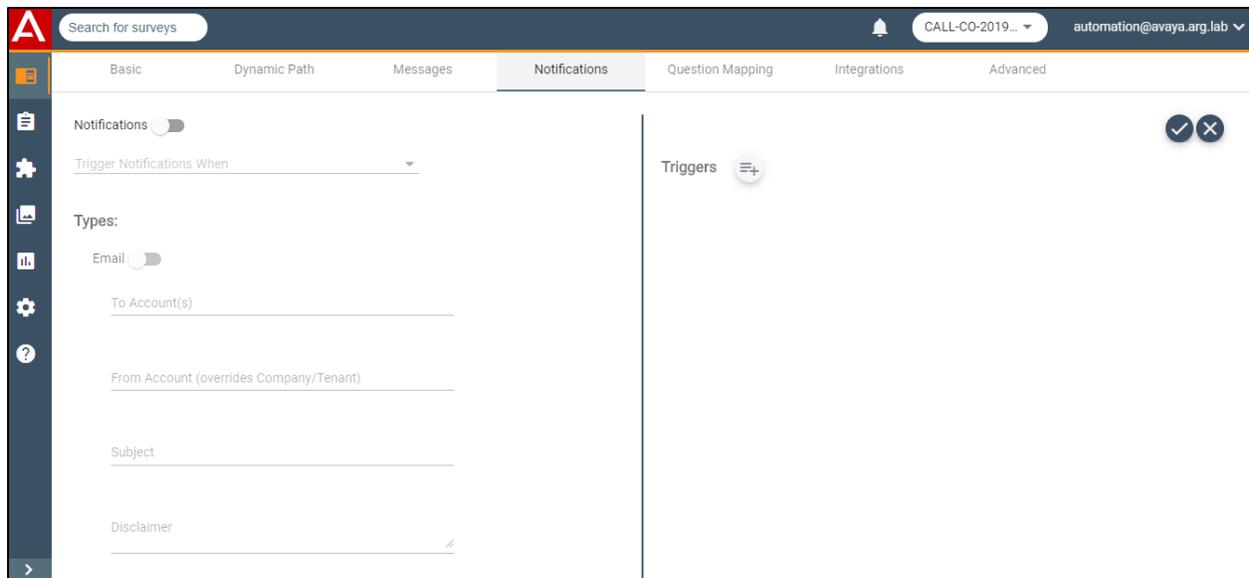
4. Click the pencil icon  to configure a Text Message. Type in your message in the **Enter your Message** text box. The message length should be less than or equal to 1024 characters, and less than or equal to the maximum accepted by the SMS Gateway.

5. Click **Save** .

## Notifications Tab

### Procedure

This section is applicable when you want to trigger notifications for started surveys. The notifications will always generate a Kafka Event and can send emails to the configured email accounts.



**Figure 12: Notifications**

1. Enable the Notifications.
2. In the combo box below, select the type of trigger you want:
  - a. **Always:** Generates a notification for every survey started by the time it ends.
  - b. **On Answer:** Generates a notification only if a certain condition related to an answer provided is met.
  - c. **Completed Surveys:** Generates a notification only for surveys that are completed.
  - d. **Not Completed Surveys:** Generates a notification only for not completed surveys.
3. Only for **On Answer** notifications, you need to follow the next steps, otherwise go to step 7.
4. Create a trigger on the right side of the window.
5. Complete the name and the description of the trigger.
6. Select the conditions for which you want to trigger the notification. You can create multiple conditions for the same trigger. Example: We trigger a notification when a caller answers No to the question 'Are you happy with our service?', or it answers 6 or lower to a Net Promoter Score question.

**Figure 13: Notification triggers**

7. You can enable email functionality, for that you must complete the information on the bottom left which is as follows:
  - a. Enable Email
  - b. Complete the email recipients
  - c. Complete the From account, where you can use what has been configured globally for the Company or Tenant.
  - d. Complete the Subject that the notification emails use.
    - I. You can add a disclaimer if needed.
8. Save the Notifications configuration.

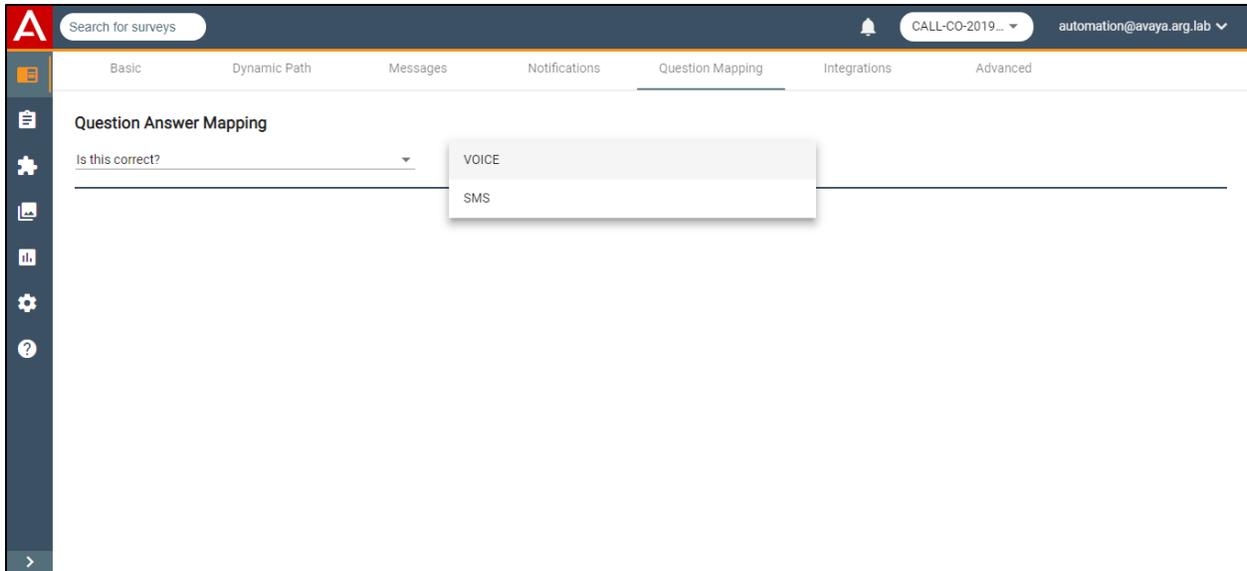
---

## Question Mappings Tab

### Procedure

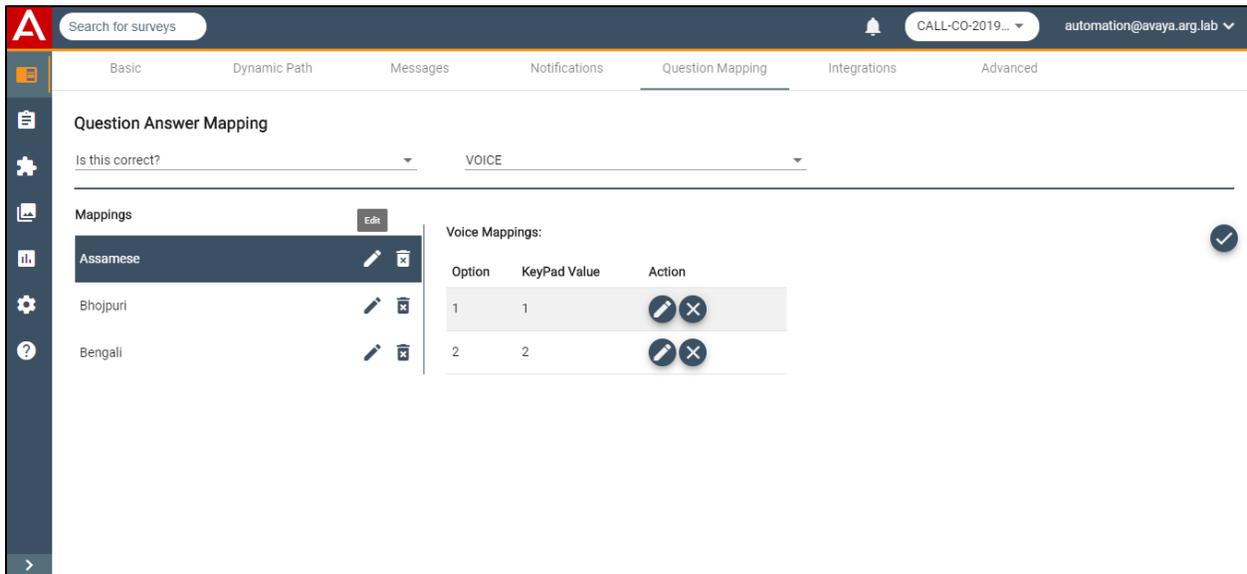
This section is applicable only in the event of having **True**, **False** or **Options** question types. Mappings are created on a per Language or Channel basis. Question mappings are done by using filters.

1. Use the Question and Channel filter to see the available questions.



**Figure 14: Question Answer Mapping**

2. Select Voice as a Channel for your question and click **Edit** icon for the mapping. For Voice questions, a default 1:1 or 2:2 map is created. The user can add more mappings as needed.
3. After the mappings are done, click **Save**.



**Figure 15: Question Answer mapping**

4. Select SMS as a channel for your Question and click **Edit** icon for the Mapping. For SMS questions, there is no default map. The user must create one or select one from the Template Bank.
5. Click **Save**.

---

# Integrations Tab

---

## POM Integration

### About this task

- **Important:**

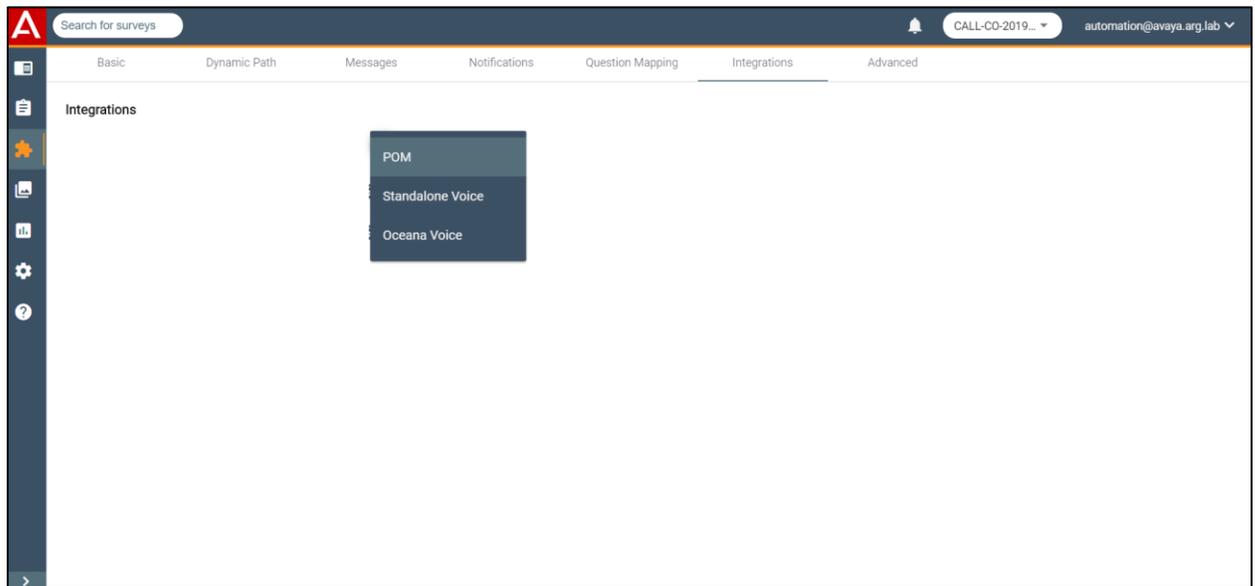
On POM Strategy -> SMS Node -> On Media Server Failure property must be set to **no\_retry** value. See Appendix for more details.

### Procedure

1. Click the **New Integration** button.



2. Select **POM**.



**Figure 16: Integrations tab – Add POM**

3. Fill up all required fields.

The screenshot shows the 'Integration' configuration form with three tabs: 'Basic', 'Read POM Attributes', and 'Write POM Attributes'. The 'Basic' tab is active. It contains the following fields and controls:

- POM Campaign name:** A text input field.
- Transfer Destination:** A text input field.
- Description:** A text input field.
- Language:** A dropdown menu with the text "Use predefined POM Language attribute from Contact List or set the Default Language" and a "Default Language" label.
- Completion Codes:** A section with four text input fields labeled "Success", "Error", "Drop", and "Denied".
- Enabled:** A toggle switch in the top right corner, currently turned on.

**Figure 17: Filling up the fields in the Integration tab**

- **POM Campaign name:** *Required field.* Must match the exact Campaign Name in POM
- **Transfer Destination:** *Optional field,* unless using Dynamic Path with transfer is defined.
- **Description:** *Required field.* Type in a descriptive text for this integration
- **Language:** *Optional field.* Select a language from the dropdown. By default, browser language is selected.
- **Completion Codes:** *Required field.* Must match the exact Completion Codes in POM.

4. Click the **Read POM Attributes** tab.

5. You can add attributes to be read by Survey from an incoming POM feed. Those must match in name.

The screenshot shows the 'Integration' configuration form with the 'Read POM Attributes' tab active. It displays the 'Read and Save Attributes from Contact List' section. The 'Attribute' field is circled in red. Below it, a table lists attributes:

Attribute	Key/Custom Name
PHONE_1	ANI

The 'Key/Custom Name' dropdown menu is open, showing a list of attributes: ANI, Dnis, Agent ID, Ucid, and Customer ID. The 'Add to List' button is also circled in red.

**Figure 18: Integration tab**

6. Click the **Write POM Attributes**.
7. You can have the Survey write the response in a POM Attribute.

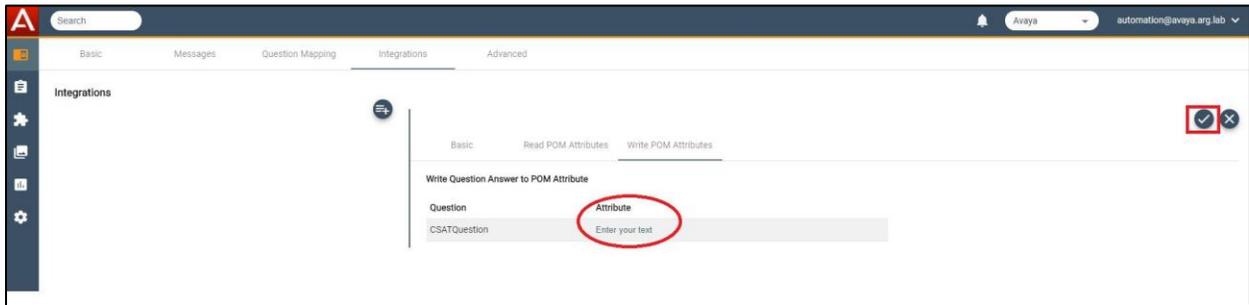


Figure 19: Writing a question and answer to a POM attribute

## Standalone Integration (CC Elite and AACC)

### Procedure

1. Click the **New Integration** button.
2. Select **Standalone Voice**

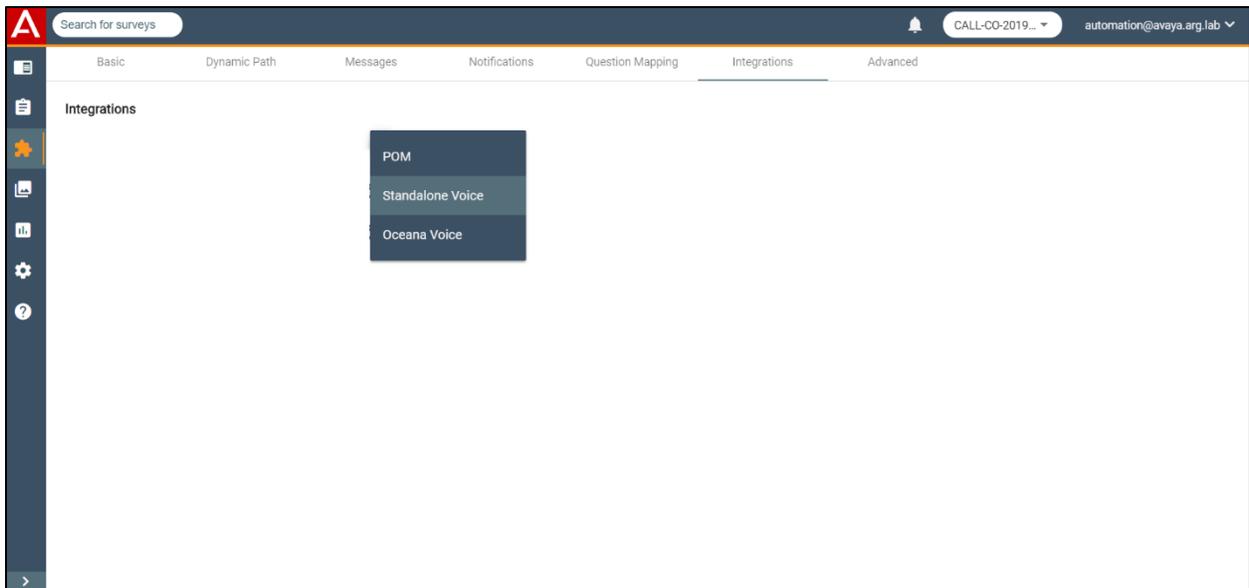


Figure 20: Standalone integration

3. Complete every field on **Basic** tab:

**Figure 21: Standalone integration – Basic Tab**

- **Description:** *Required field.* Type in a descriptive text for this integration.
- **DNIS Pattern:** *Required field.* Determines which incoming calls launch this Survey.  
You can specify a number (i.e. 60010), a sip scheme (i.e. +17204440000@avaya.com) or a range of values (i.e. 60010-60100).
- **Language:** *Required field.* Select a language from dropdown.  
This is used by the Survey, when this integration is triggered for the specified DNIS pattern.
- **Transfer Destination:** *Optional field,* unless there is a Dynamic Path with transfer defined.  
Different Transfer Destinations can be added, unless there is an already existing entry for same DNIS-Language combination.

4. Click the **Advanced** tab. You can configure the following items:

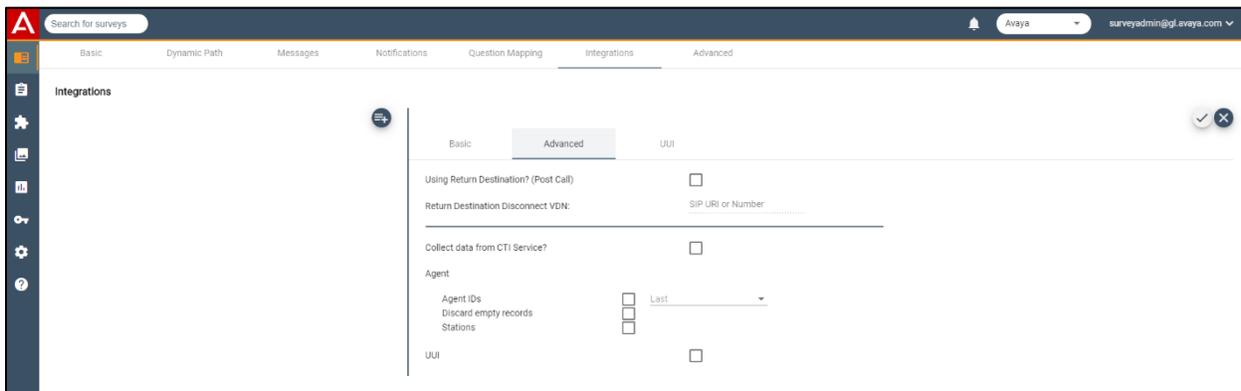
- Using Return Destination? (Post Call): If this is a Post Call scenario using Contact Center Elite’s Return Destination feature, then you must set a Return Destination Disconnect VDN to disconnect the customer’s call after Survey completion. By default, the value is obtained from Global Configuration if it is configured. If this is missing it may cause the survey to start over once it is completed.
- CTI data can be collected from the call, including its UUI. CTI data is collected using the TLink component (CC Elite with AES) or CCT component (AACC with CCT). Information available will depend on the environment.

For information on creating a TLink configuration, check *AES Configuration* in this guide. For information on configuring the CCT component, check the *Installation Guide*.

- Agent IDs: If you are collecting the Agent IDs, you can specify if you want to save all the Agent IDs, all the Agent IDs excluding duplicates that is, in case an agent

was involved in the call more than once, the first Agent ID serving the caller, the last Agent ID serving the caller, or the First and Last Agent ID.

- d. Discard empty records: Enabling this option will discard records with stations but no Agent IDs, these records will not appear in the Survey Assist reports.
- e. Stations: Enabling this option also adds the stations used by agents as part of the context information, if available.
- f. UUI: If enabled, the UUI value is included as context information.



**Figure 22: The Advanced tab**

If the UUI uses delimiters or separators, choose *Delimited*, if the values are included in fixed positions, configure it as *Fixed*.

When using Delimited format and key/values, you can configure the keys being used.

Delimited Format:

- Order: The order of the value you are trying to collect in the UUI
- Key?: Check if you are using key/value pairs
- Key Delimiter: It will be the key plus any delimiter included, example: for the key/value pair **PHONE=17204440000**, your key delimiter will be **PHONE=**
- Parameter/Custom Name: If you want to override an existing value, you can pick that value from the combo, otherwise, you can define the name of the new variable you store in the survey context.

Example:

If the UUI is **PHONE=17204440000;ID=123456**, you can configure it as:

Parameter	Order	Key
ANI	1	PHONE=
CustomerID	2	ID=

In this example, the first value replaces the value of the **ANI** variable, while the second value is included in a new variable named **CustomerID**.

The result is:

```

{
  "UUI_PARSED": "PHONE=17204440000;ID=123456",
  "CustomerID": "123456",
  "ANI": "17204440000",
  "UUI_PLAIN": "PHONE=17204440000;ID=123456"
}

```

**Fixed Format:**

- From: First character for the value in the UUI (being 1, the first character in the UUI)
- To: Last character in the UUI.
- Key?: Checked if you are using key/value pairs.
- Parameter/Custom Name: If you want to override an existing value, you can pick that value from the combination, otherwise, you can define the name of the new variable stored in the survey context.

Example:

If the UUI is **17204440000123456**, you can configure it as:

Parameter	From	To	Key
ANI	1	12	
CustomerID	12	18	

The result will be:

```

{
  "UUI_PARSED": "17204440000123456",
  "CustomerID": "123456",
  "ANI": "17204440000",
  "UUI_PLAIN": "17204440000123456"
}

```

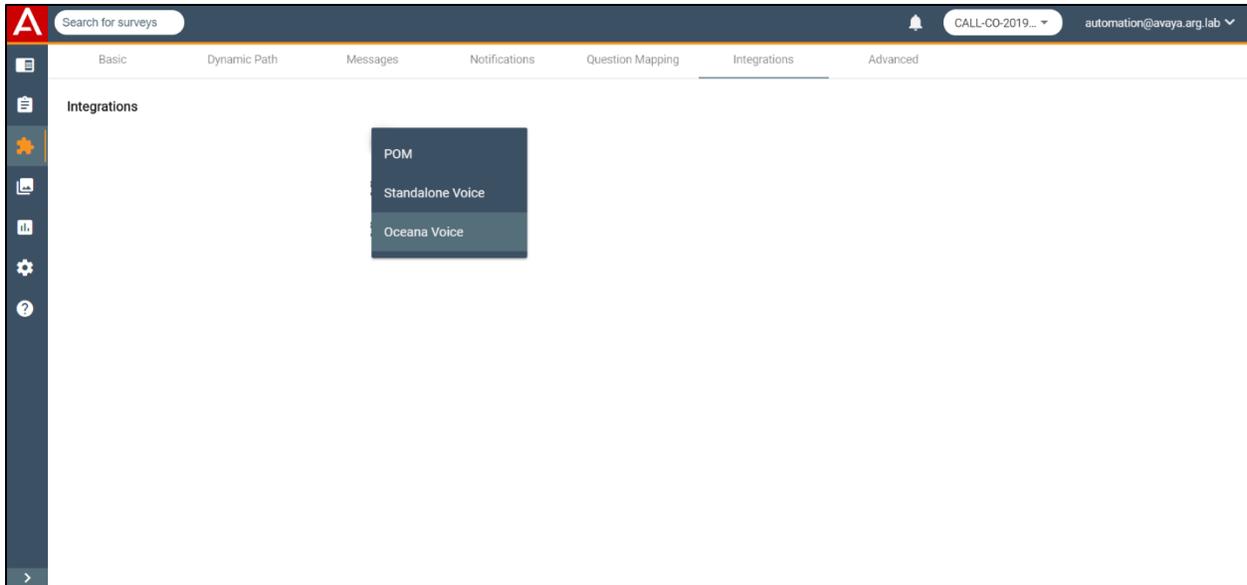
5. Save the Integration.

---

## Oceana Integration

### Procedure

1. Click **New Integration** button  .
2. Select **Oceana Voice**.



**Figure 23: Oceana Integration**

3. Complete all the fields for the **Basic** tab:

 The screenshot shows the configuration form for the Oceana Integration, specifically the 'Basic' tab. The form has four main sections:
 

- Language:** A dropdown menu with a blue arrow icon.
- Enabled:** A toggle switch currently turned on.
- Transfer Destination:** A text input field.
- Description:** A text area with a horizontal line below it.
- Attribute / Value table:** A table with two columns: 'Attribute' and 'Value'. There is an 'Add' button to the right of the table. Below the table, there are labels for 'Attribute', 'Value', and 'Actions'.

**Figure 24: Oceana Integration – Basic Tab**

- a. Language: This is the language that is used in Survey when this integration is triggered.
- b. Transfer Destination: Optional field, unless using Dynamic Path with transfer defined.
- c. Description: A description for this integration.
- d. Attribute / Value table: The list of attributes that is used to define if this integration should be triggered. When a call reaches Survey, Survey will check the attributes for the call in Oceana, if the attributes match the required values, the integration will launch the current survey. The list of attributes and the values used needs to

be unique for each survey (otherwise, the application would not be able to differentiate which survey integration to trigger).

4. In the following tabs, do the following:
  - a. In the **Advanced** tab check the **Agent IDs** box if you want to keep Agent information as context data.
  - b. In the **Read Attributes** tab, you can define attributes which values you want to keep in Survey as context data for each call taking the survey.
  - c. In the **Write Attributes** tab, you can define the name of the Oceana attributes where you want to store the answers to the survey's questions.
5. Save the integration.

---

## Advanced Tab

This is only for an SMS Survey. After dispatching an SMS Survey, Survey waits for a response for a certain period before finishing the survey as abandoned. During this timeframe, new surveys for the same phone number do not start.

### Procedure

1. Click the **Advanced tab** and select the amount of time in hours for the SMS to expire. The default is 6 hours.
2. Click **Save**.

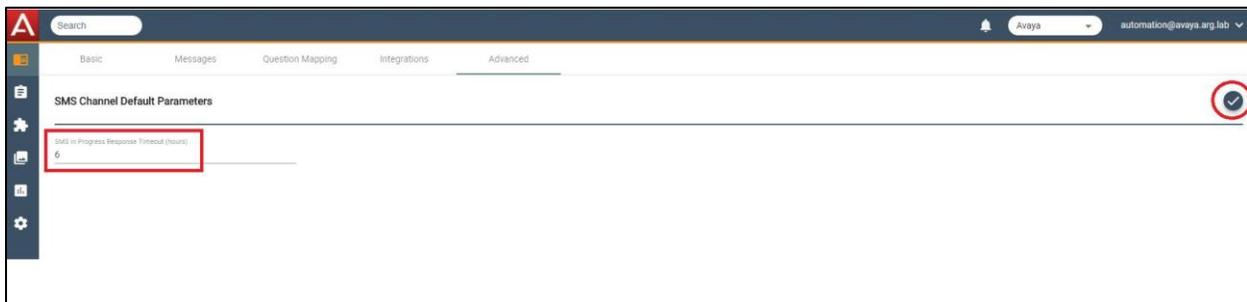


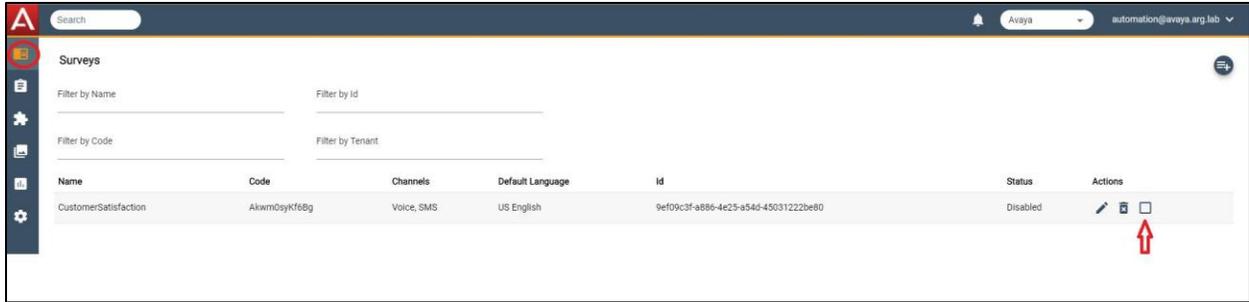
Figure 25: SMS Channel default parameters

---

## Enabling a Survey

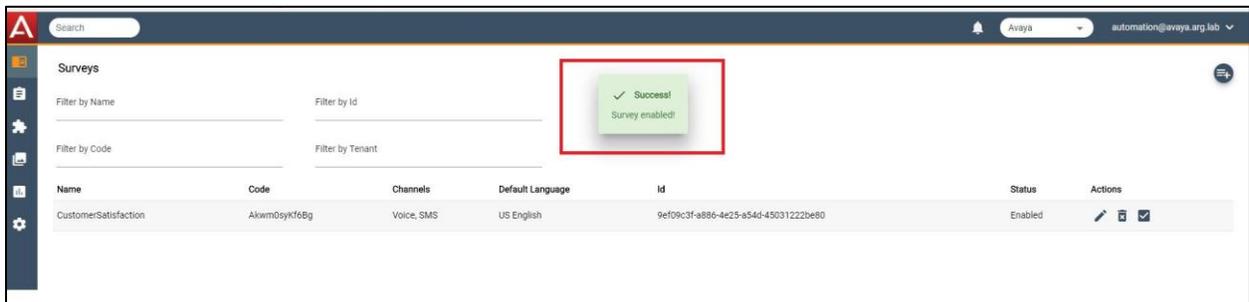
### Procedure

1. Click the Survey List button, and then select the **Enable** checkbox for the desired Survey to be enabled.



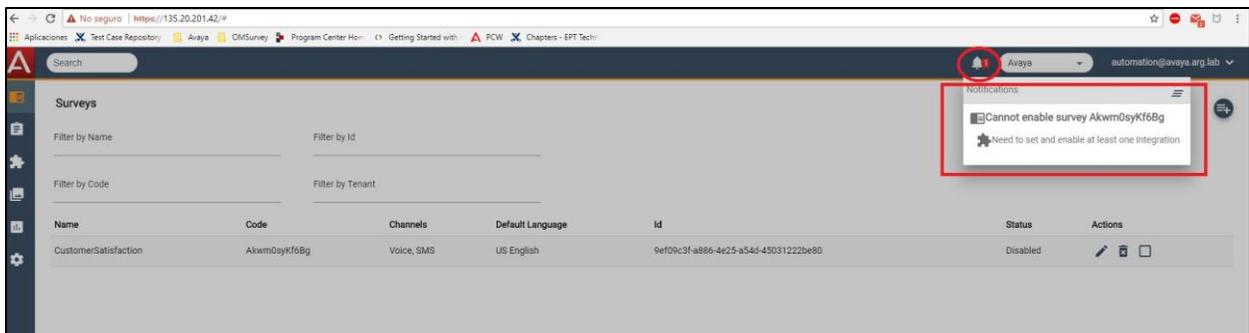
**Figure 26: Enabling a survey**

2. For a Survey to be enabled, all Integrations, Messages and Mappings must be completed. If one field is missing, the notification system provides an alert to the user to convey which field is missing.



**Figure 27: Survey enabled successfully**

3. After all fields are completed, the user needs to enable the Survey again. If all fields are properly entered, the survey is enabled.



**Figure 28: Survey cannot be enabled**

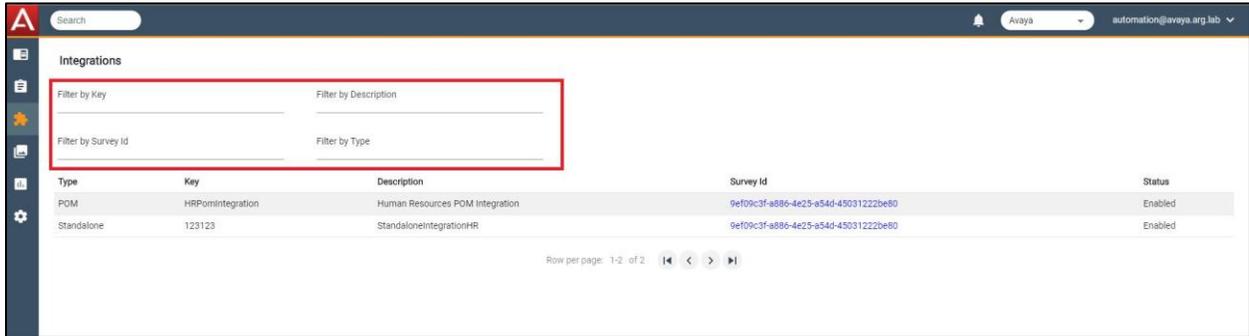
## Integrations

### Procedure

1. Click the Integrations button on the left side of the menu.

You can see and filter through all the existing Integrations. Only one integration with the same name is allowed for any given Survey. You can use several filters to go through the list.

2. By clicking the Survey Id for a specific integration, the Edit window opens for the selected Survey.



**Figure 29: Integrations**

# Chapter 4: Template Bank

## Global Bank

### Procedure

1. Click the Template Bank on the left side menu.
2. Select the **Global Bank** tab and click the **Add** button.

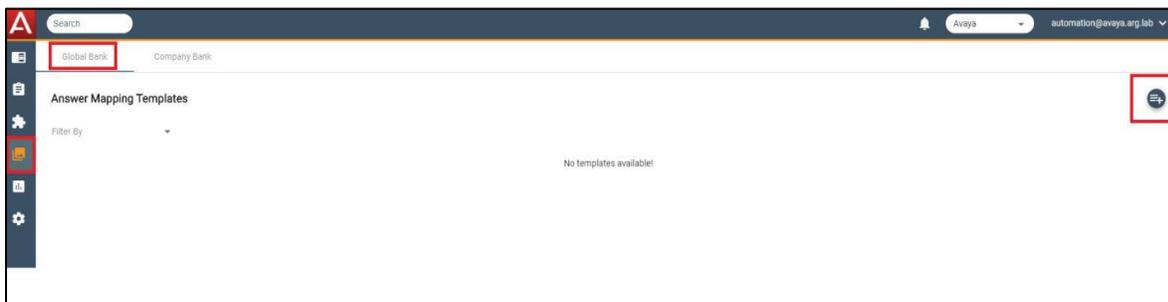


Figure 30: Global Bank

3. Type in the Template Name and select the Type of Question. This is only available for True or False or Optional questions.
4. Select the languages for this Map. You need to enter a map for each language.
5. Complete the Map.

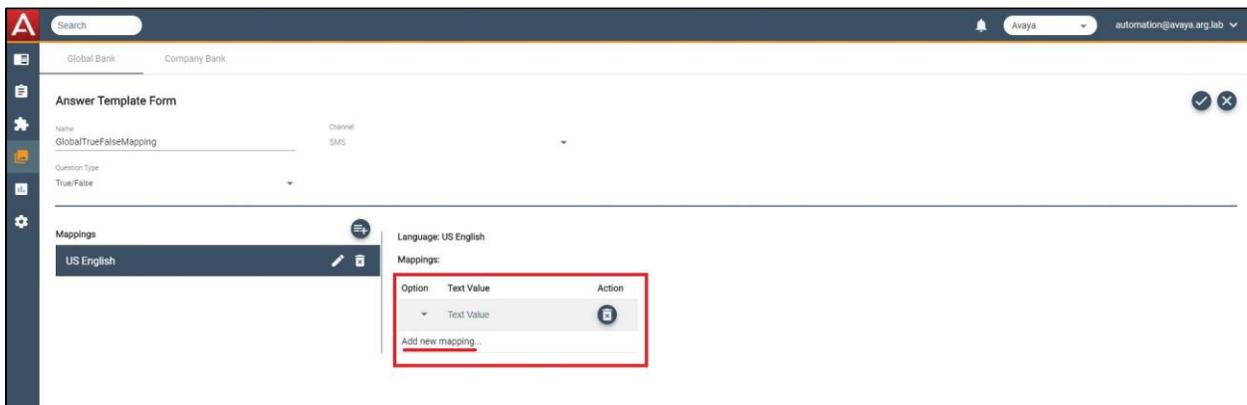


Figure 31: Select the languages and mappings

6. Save the Template.

## Company Bank

### Procedure

1. Click the Template Bank on the left side of the menu.
2. Select the **Global Bank** Tab and click the **Add** button.
3. To add a Company Bank, refer to the steps of Global Bank.

# Chapter 5: Reports

This chapter describes all the features present in **Reports** page, along with a detailed description for every field and the expected values in each case.

## Pull Up Reports

### Procedure

1. Click the **Reports** icon on the left menu bar.

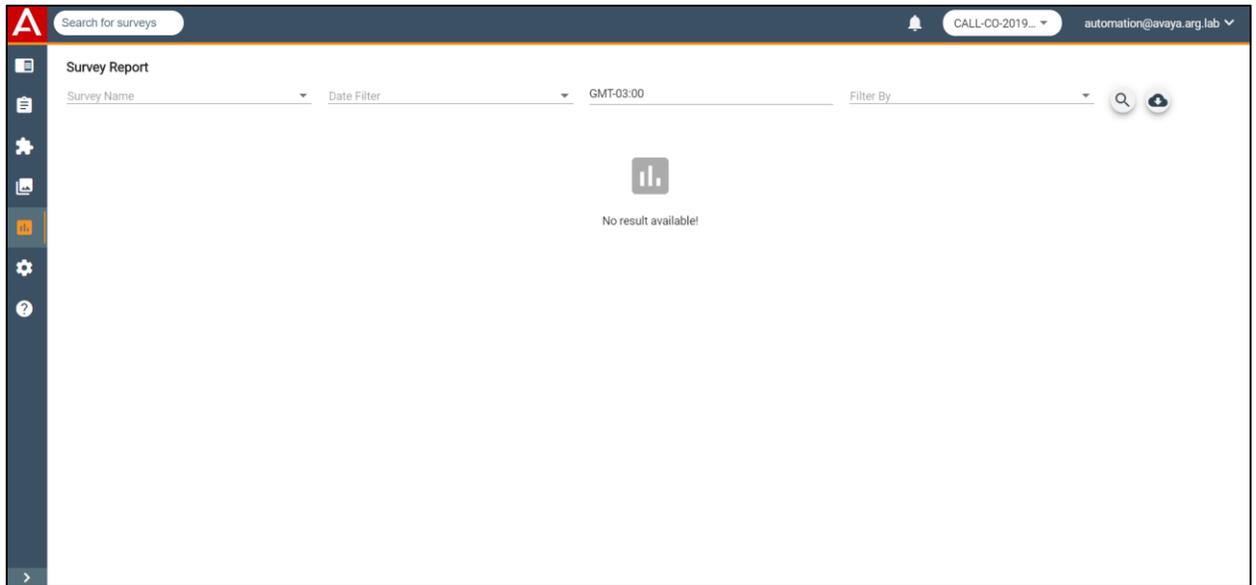


Figure 32: Survey Report

2. Complete the following fields to perform a search:

Field	Description
Survey Name	Select a survey from the dropdown
Time Zone	Populated by default with browser's time zone To change it, click it and select a time zone from the dropdown or either type it.

Field	Description
	<div data-bbox="721 268 1344 695"> <p>GMT-03:00]</p> <ul style="list-style-type: none"> <li>GMT-03:00 - Brasilia Time</li> <li>GMT-03:00 - Argentine Time</li> <li>GMT-03:00 - French Guiana Time</li> <li>GMT-03:00 - Western Greenland Time</li> <li>GMT-03:00 - Pierre &amp; Miquelon Standard Time</li> </ul> </div>
<p><b>Date Filter</b></p>	<p>Select one of the pre-set periods (<b>Today, Yesterday, This Week, Last Week, This Month, Last Month</b>), or customize it by using:</p> <p><b>Last</b> - enter a number and a unit (<i>hours/days</i>)</p> <div data-bbox="721 951 1349 1104"> <p>Last... ▾</p> <hr/> <p>Number</p> <p>3 Day(s) ▾</p> </div> <p><b>Between</b> – enter a starting date and an ending date</p> <div data-bbox="721 1230 1354 1461"> <p>Between... ▾</p> <hr/> <p>Date Started</p> <p>2019-07-26 00:00 </p> <hr/> <p>Date Completed</p> <p>2019-07-26 12:41 </p> </div>
<p><b>Filter By</b></p>	<p>Select one of the following filtering options:</p> <p><b>Reason</b> – select a reason from dropdown</p>

Field	Description
	<div data-bbox="717 262 1370 676"> <p>Reason <span style="float: right;">▼</span></p> <ul style="list-style-type: none"> <li>Transferred</li> <li>Error</li> <li>Disconnected</li> <li>Success</li> <li>Cancelled</li> </ul> </div> <p data-bbox="717 751 1429 785"><b>Reason and Channel</b> – select a reason and a channel</p> <div data-bbox="717 802 1370 1197"> <p>Reason and Channel <span style="float: right;">▼</span></p> <ul style="list-style-type: none"> <li>Transferred</li> <li>Error</li> <li>Disconnected</li> <li>Success</li> <li>Cancelled</li> </ul> </div> <div data-bbox="717 1218 1370 1356"> <ul style="list-style-type: none"> <li>Voice</li> <li>SMS</li> </ul> </div> <p data-bbox="717 1432 1445 1465"><b>Reason and AgentID</b> – select a reason and an AgentID</p> <div data-bbox="717 1482 1370 1818"> <ul style="list-style-type: none"> <li>Transferred</li> <li>Error</li> <li>Disconnected</li> <li>Success</li> <li>Cancelled</li> </ul> </div>

Field	Description
	<input type="text" value="AgentID"/>
	<b>Channel</b> – select a channel from dropdown
	<input type="text" value="Channel"/> <div style="border: 1px solid #ccc; padding: 5px; margin-top: 5px;">           Voice                       SMS         </div>
	<b>Contact (ANI)</b> – type in the ANI
	<input type="text" value="Contact (ANI)"/> <input type="text" value="Contact (ANI)"/>
	Use <b>Clear</b> to clean the filter

3. By default, search button is disabled  till **Survey Name** and **Date Filter** fields are populated.

4. The search button becomes available  . By clicking it, report is shown:

Results by Survey 									
Status	Reason	Date Started	Channel	Integration type	Integration Key	Language	Contact Number	Agent ID	More
> COMPLETED	SUCCESS	2019-07-29 05:36:37	Voice	Standalone	60142	US English	50011		
> COMPLETED	SUCCESS	2019-07-29 05:38:23	Voice	Standalone	60142	US English	50011		
> COMPLETED	SUCCESS	2019-07-29 05:40:21	Voice	Oceana Voice	Service:Sales	US English	<NOT-FOUND>	8431002	
> COMPLETED	SUCCESS	2019-07-29 05:42:10	Voice	Oceana Voice	Service:Sales	US English	<NOT-FOUND>	8431002	
> COMPLETED	SUCCESS	2019-07-29 05:43:53	Voice	Standalone	60142	US English	50011		
> COMPLETED	SUCCESS	2019-07-29 05:45:43	Voice	Standalone	60142	US English	50011		



**Figure 33: Results by Survey**

• **Note:**

Paging arrows  become available when more than 50 results are displayed.

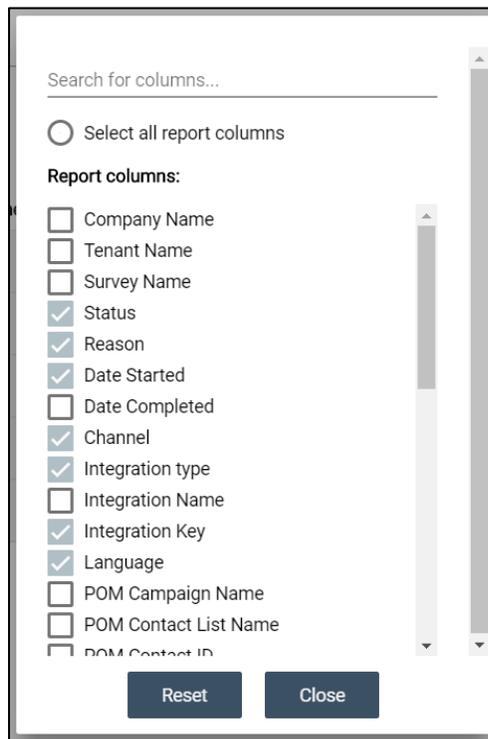
# Filter Columns

## About this task

Search results can be filtered out by using the **Filter Columns** feature. This action impacts on report showed in UI and exported results (CSV) as well.

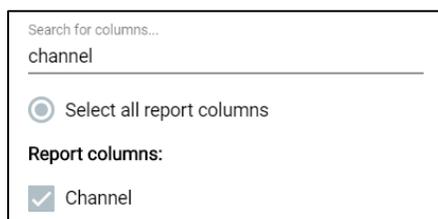
## Procedure

1. Click the filter button 
2. The following pop-up is displayed:



**Figure 34: Filter Columns**

3. Check or uncheck columns to match your report expectations, or use **Select all report columns** radio-button to check all of them.
  - **Note:** Columns can be searched by name.



**Figure 35: Filter Columns – Searching by name**

4. Click **Close**.

- **Note:** To revert any change, click **Reset**.

---

## Expanded View

### Procedure

1. You can expand each Survey result by clicking the **Expand** button next to it . This opens the Expanded View.



COMPLETED	SUCCESS	2019-09-02 10:12:16	Voice	Standalone	5000	US English	441483308832	400006	
Question	Status								
Are you satisfied with the service?	NO_INPUT								
From 1 to 5 how good was the service?	SUCCESS				2			2	

**Figure 36: Expanded View**

This view shows details on how the Survey went. Find column description in following table:

Column	Description
<b>Question</b>	Question name
<b>Status</b>	Question status. Possible values: <ul style="list-style-type: none"><li>• STARTED</li><li>• IN_PROGRESS</li><li>• COMPLETED</li><li>• UNCOMPLETED</li></ul>
<b>Result</b>	Validation result
<b>Input</b>	Customer answer NOTE: if it's a recorded answer, it can be downloaded

---

## Detailed View

### Procedure

1. By clicking the **View** button , the detailed view comes up.

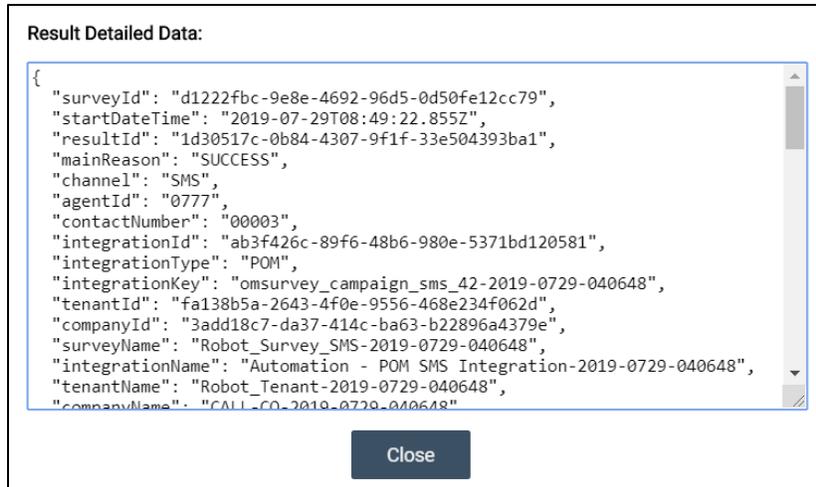


Figure 37: Detailed View

This view shows all the information related to that Survey. (*current data stored in the database*)

## Download Report

### Procedure

1. To download reports, click the **Download** button. 

Upon downloading the reports, a CSV file is saved. The file contains details on the Survey.

- **Note:** Exported results can be filtered following [Filter Columns](#) steps.

Field	Description
Survey ID	Survey identifier in UUID format
Survey Name	Survey Name
Date Started	Survey Start Time
Date Completed	Survey End Time
Result ID	Result identifier in UUID format
Reason	Reason explaining the current status of the Survey. Possible values are: <ul style="list-style-type: none"> <li>• SUCCESS</li> <li>• TRANSFERRED</li> <li>• DISCONNECTED</li> </ul>

Field	Description
	<ul style="list-style-type: none"> <li>• CANCELLED</li> <li>• ERROR</li> </ul>
<b>Channel</b>	Channel used for answering the Survey. Possible values are: <ul style="list-style-type: none"> <li>• VOICE</li> <li>• SMS</li> </ul>
<b>Agent ID</b>	ID of the Agent that served the Contact
<b>Contact Number</b>	Caller ID
<b>Integration ID</b>	Integration identifier in UUID format
<b>Integration Name</b>	Integration Name as shown on the Web Administration Application
<b>Integration Type</b>	Type of Integration. Possible values are: <ul style="list-style-type: none"> <li>• POM</li> <li>• STANDALONE</li> </ul>
<b>Integration Key</b>	Integration Key depends on the Type of Integration (DNIS, POM Campaign)
<b>Company ID</b>	Company identifier in UUID format
<b>Company Name</b>	Company Name as shown on the Web Administration Application
<b>Tenant ID</b>	Tenant identifier in UUID format
<b>Tenant Name</b>	Tenant Name as shown on the Web Administration Application
<b>Language</b>	Language (e.g.: US English)
<b>Status</b>	Status for the Survey answer. Possible values are: <ul style="list-style-type: none"> <li>• STARTED</li> <li>• IN_PROGRESS</li> <li>• COMPLETED</li> <li>• UNCOMPLETED</li> </ul>
<b>Notification</b>	Indicates if the notification was triggered
<b>Notification Trigger Name</b>	Name of the Trigger which raised the Notification
<b>Context Data</b>	If applicable

The following information will be added, always by default, for each question and answer:

Field	Description
Name	Question Name as shown on the Web Administration Application
Order	The order in which the question was presented
Answer Type	<p>The type of result expected, based on the Question Type. Possible values are:</p> <ul style="list-style-type: none"> <li>• Comment</li> <li>• Boolean</li> <li>• Digits</li> <li>• Range</li> <li>• Date</li> <li>• Options</li> </ul>
Result	<p>Result for the Question. Possible values are:</p> <ul style="list-style-type: none"> <li>• Success</li> <li>• No Match</li> <li>• No Input</li> <li>• Internal Error</li> <li>• Not Available</li> <li>• Not Asked</li> </ul>
Result Value	The value of the answer based on the input
Input Value	Actual Input, in case of a recorded message, the URL to the message
File Id	ID for the Comment file, if applicable
File Size	If applicable
File Duration	If applicable

# Chapter 6: Private Data

## Private Data at rest and in transit

### Data in transit

Data in transit consists on the following types:

- Between clients (GUI, platform, etc.) and REST APIs services is done via HTTPS using TLS v1.2 and strong ciphers on port 443.
- If enabled, Kafka broker is using TLS v1.2 on port 9192.

### Data at rest

Data is stored encrypted and compressed by database on filesystem. Encryption is performed using Advanced Encryption Standard algorithm in Cipher Block Chaining (CBC) mode with a key size of 256 bits.

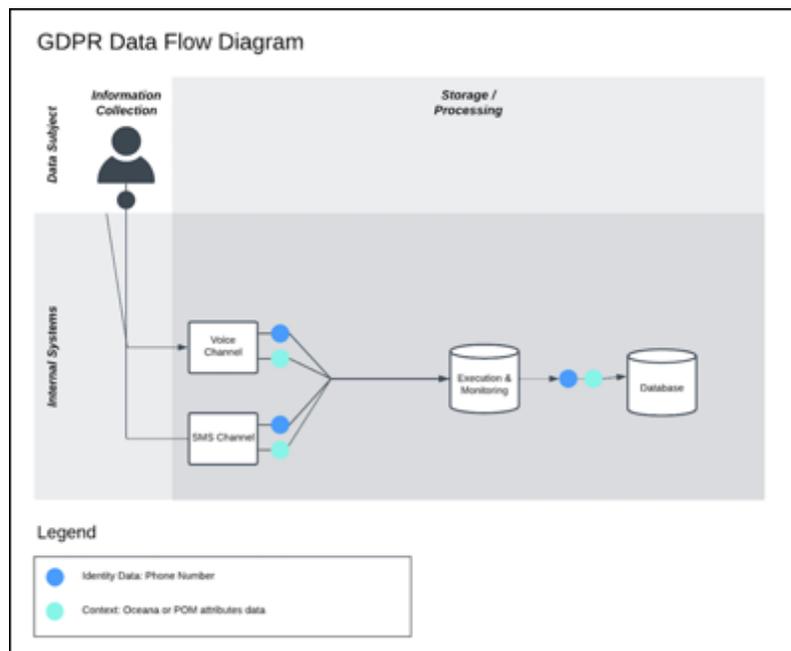


Figure 38: Private Data Flow in transit and at rest

---

## Private Data collection notification

If a notification of Private Data being collected is required, this can be accomplished during the survey by using the welcome message (i.e.: adding the notice after the welcome itself, as part of the same message) and/or in any of the question messages (i.e.: adding the notice before the question, in the same message).

---

## Private Data collection consent

If needed, the consent from the customer to collect any personal data can be achieved by adding a True/False question as the first one offered to the customer.

If the customer provides consent, the next question is offered, the consent will be stored and kept as the answer to the first question in the survey results for as long as the results are kept in Survey Assist.

If the customer does not provide consent, the survey should be finished by using a Dynamic Path condition.

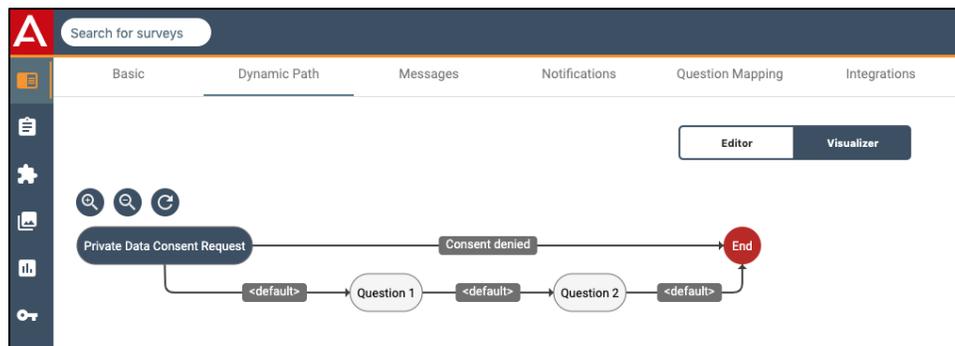


Figure 39: Private Data Flow in transit and at rest

---

## Private Data Request Fulfillment

Exporting, anonymizing or deleting private data for a Contact

### Procedure

1. Click the left menu option to go to **Data Privacy**.
2. In the **Requests fulfillment** tab, select the scope of the search
  - a. **System wide**, when you want to search in the whole system (only for Survey Administrators)
  - b. **Company wide**, when you want to search in the Company currently selected (available to Survey and Company Administrators)

- c. **Tenant wide**, when you want to search in one of the Tenants for the currently selected Company (available to Survey and Company Administrators)
3. Complete the **Contact Number** you want to search for.
4. Click **Search**.
5. If data is found for the **search scope** and the **Contact Number** selected, three options will be provided:



**Figure 40: Private Data Request Fulfillment**

- d. Click on **Export**, if you want to export the records found for the Contact Number. A .zip file containing all survey results with the available audio recorded comments will be generated.
  - e. Click on **Anonymize**, if you want to keep the records but remove the private data (contact number, voice recorded comments) included in those
  - f. Click on **Delete**, if you want to delete all the survey results, including audio recorded comments, for that Contact
6. You can include a comment explaining the reasons for the current action.
7. Click on **Continue**.

---

## Private Data Fulfillment Audit

Audit records for Requests Fulfillment

### Procedure

1. Click the left menu option to go to **Data Privacy**.
2. In the **Fulfillment Audit** tab, complete the Contact Number you want to search for.
3. Click on Search.
4. If Fulfillment Requests have been addressed for the Contact Number selected, a list with the actions, dates, and comments, will be listed.

# Chapter 7: Settings

## Licensing

### Procedure

8. Click the left menu option to go to **Settings**.
9. Click the **Licensing** Tab within Settings.
10. You can configure the WebLM Server Host and check the available Licenses for your Survey instance.

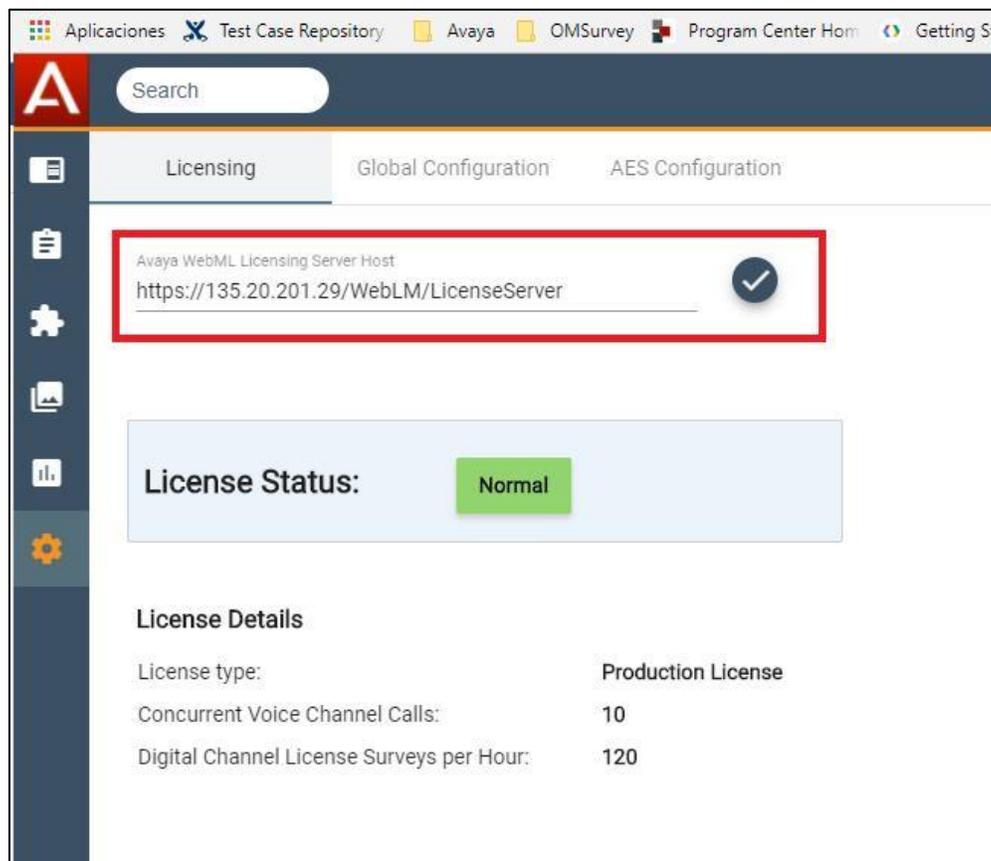


Figure 41: Licensing

## Global Configuration

### Procedure

1. Click the **Global Configuration** Tab within Settings.

2. You can configure the Global Return Destination Disconnect VDN, and the Data Retention period.

---

## AES Configuration

---

### Importing AES Certificate

#### Before you begin

Before adding a new TLINK, you need to import the AES Certificate into the trust store.

#### Procedure

1. Get the AES certificate as shown in the *Installation Guide*.
2. Import the certificate into the trust store according to the *Installation Guide*.
3. Copy the JKS file to the Callinfo docker volume security folder `cp CERT_DIR/aes_trustedcerts.jks /opt/avaya/survey/docker_volumes/callinfo-rest/security`

---

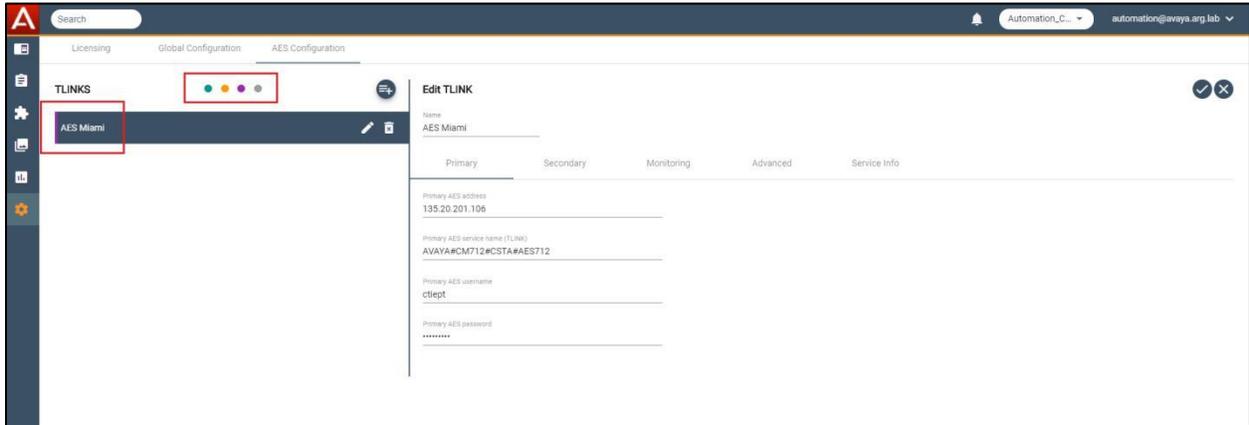
### Adding a new TLINK

#### Procedure

1. Click the left menu option to go to **Settings** menu.
2. Click the **AES Configuration** tab within Settings.
3. Click the **New** button to add a new AES. Complete the Primary and Secondary tabs with the correct AES information:
  - a. Address: AES IP/FQDN address where TSAPI service is listening for incoming connections.
  - b. Service Name: AES TSAPI Service name to connect to.
  - c. Username: a username with CTI permission on AES.
  - d. Password: username password.
4. Go to the **Monitoring** tab and enter the entities required to monitor Agent's calls.
  - a. **VDNs to monitor**: Queuing VDNs numbers for the calls to be monitored. Use comma to separate different VDNs or also define ranges. For example: "30001, 30010-30020, 50055".
  - b. **Skills to monitor**: Agent's Group Extension numbers for the calls to be monitored. Use comma to separate different Group Extensions or also define ranges. For example: "10001, 10010-10020, 10055".
5. Under the **Advanced** tab, select the use of AES trusted licenses if using Secured Service Name (TLINK) and optionally change the Reconnect Timeout.

The service info tab is populated from the Survey Service after the setup is complete.

6. After it is saved, the system displays the new AES under the TLINKS list.



**Figure 42: AES link is displayed under the TLINKS list**

7. Below is the status description:

Status	Color	Description
Running	Green	AES Tlink connection OK
Down	Orange	AES Tlink connection is failing, check configuration parameters and service logs
Out of Service	Purple	The Survey Assist service is down
Unknown	Grey	Cannot get detailed information about status, check service logs.

## Adding Skills/VDNs to be monitored

### Procedure

1. Click the left menu option to go to **Settings** menu.
2. Click the **AES Configuration** tab within Settings.
3. Click the **Edit** button on the AES that monitors the new Skills/VDNs.
4. Go to the **Monitoring** tab and add the VDNs and Skills to monitor as shown on previous section.
5. Save the configuration.
6. The system reloads the configuration. Any call being handled while the configuration is being reloaded, does not include the Agent information.

# Chapter 8: Kafka

---

## Survey Events

Survey Assist provides events for the following two scenarios:

- A new survey is started
- A new survey result was saved
- A notification is triggered

These events are available to be consumed by third-parties or customers by connecting to Survey Assist Apache Kafka instance. For more information on Kafka see <https://kafka.apache.org/intro>.

---

## Connecting to Kafka

For the following steps you need a Kafka client API or tool. To explain the connection details, the out of box client scripts provided on Kafka download binary are used. It can be obtained from [https://www.apache.org/dyn/closer.cgi?path=/kafka/2.0.0/kafka\\_2.11-2.0.0.tgz](https://www.apache.org/dyn/closer.cgi?path=/kafka/2.0.0/kafka_2.11-2.0.0.tgz).

---

## Configuring Kafka client with SSL

### Procedure

1. Copy the keystore `kafka.client.trust.store.jks` to the kafka client.

For single box installations, the file is located in:

`/opt/avaya/survey/docker_volumes/kafka/security`

For HA installations, the file is located in:

`/opt/avaya/installer/certificates`

- a. A new file named `client-ssl.properties` must be created in the config directory, which is used as a parameter for using the Kafka producers and consumers.
- b. The ssl trust store details are as per the following:
  - `security.protocol=SSL`
  - `ssl.truststore.location=<kafka.client.truststore.jks location>`
  - `ssl.truststore.password=changeit`
  - `ssl.endpoint.identification.algorithm=`

2. The survey topics are the following:

- survey-started
- survey-result
- survey-notification

---

## Testing the connection

### About this task

Add messages to the survey-result topic and consume them to test the connection.

### Procedure

1. Get the Hostname where Survey is installed and replace <hostname> in the following steps with its value. This is used for the scripts to test the connection.
2. Move to the Kafka main directory, for example </opt/kafka\_2.12-2.0.0>:  
> cd /opt/kafka\_2.12-0.11.0.1/
3. Run the producer and insert a few lines of text to insert them into the survey-result topic.
  - a. Single box installations:
    - Run the producer script and then type a message on the console to send it to the server:  
> bin/kafka-console-producer.sh --broker-list <hostname>:9192 --topic survey-result --producer.config config/client-ssl.properties
  - b. HA installations:
    - Run the producer script and then type a message on the console to send it to the server:  
> bin/kafka-console-producer.sh --broker-list <hostname>:<port> --topic survey-result --producer.config config/client-ssl.properties

The value for <port> could be 30001, 30002, 30003.

The value for <hostname> could be any of the nodes IP addresses.

Run the consumer to check if the messages are available in the survey-result topic:

Single box installations:

- Run a consumer that sends the same message to standard output if everything is working fine:  
> bin/kafka-console-consumer.sh --bootstrap-server <hostname>:9192 --from-beginning --topic survey-result --consumer.config config/client-ssl.properties

Testing connection

HA installations:

- Run a consumer that sends the same message to standard output if everything is working fine:  

```
> bin/kafka-console-consumer.sh --bootstrap-server
<hostname>:<port> --from-beginning --topic survey-result
--consumer.config config/client-ssl.properties
```

The value for <port> could be 30001, 30002, 30003.

The value for <hostname> could be any of the nodes IP addresses.

---

## Kafka Event Model

---

### Common Model

Field	Description	Example
family	Event family name	EPTOMSURVEY
type	Event type within the family	SURVEY-STARTED, SURVEY-RESULT, etc.
version	Version of the event	1
genTime	Event generation timestamp in milliseconds	1480588385784
pubTime	Timestamp in milliseconds when the event was published	1480588385784
ingestTime	Timestamp in milliseconds when the event was ingested by the application that generated it.	1480588385784
proclD	Process ID of the generator app	-
orglD	The organization ID that originated the event - may be empty	-
custlD	The customer ID that originated the event - may be empty	-

Field	Description	Example
sessionId	The session where this event was generated.	
interId	Interaction identifier of this interaction.	-
segId	The segment ID of this event.	-
segIdx	The segment index starting from 1	-
txId	The transaction ID this event was generated from.	-
seqNum	The sequence number of this event, starting at 1.	1
data	Event specific payload	See events below

---

## Survey Started Event

Field	Description	Example
surveyId	Survey identifier in UUID format	9ca51bfe-85f2-4c8f-be38-c839d737b8e3
integrationId	Integration identifier in UUID format	692ca13b-6f62-4243-8147-aedda26adefc
tenantId	Tenant identifier in UUID format	21ff51a1-379e-4623-b8d0-f7cb2da78101
companyId	Company identifier in UUID format	51ff51a1-379e-4623-b8d0-f7cb2da78287
companyName	Company Name as displayed on Web Administration Application	Avaya
tenantName	Tenant Name as displayed on Web Administration Application	Services

Field	Description	Example
surveyName	Survey Name as displayed on Web Administration Application	Agent Feedback
integrationName	Integration Key value as displayed on Web Administration Application	
channel	SMS or Voice	SMS
language	Language code and name.	See below
startDateTime	Date and time when the survey started	1480588385784

## Survey Result and Survey Notification Events

Field	Description	Example
surveyId	Survey identifier in UUID format	9ca51bfe-85f2-4c8f-be38-c839d737b8e3
integrationId	Integration identifier in UUID format	692ca13b-6f62-4243-8147-aedda26adefc
resultId	Survey Result identifier in UUID format	21ff51a1-379e-4623-b8d0-f7cb2da78101
tenantId	Tenant identifier in UUID format	21ff51a1-379e-4623-b8d0-f7cb2da78101
companyId	Company identifier in UUID format	51ff51a1-379e-4623-b8d0-f7cb2da78287
companyName	Company Name as displayed on Web Administration Application	Avaya
tenantName	Tenant Name as displayed on Web Administration Application	Services
surveyName	Survey Name as displayed on Web Administration Application	Agent Feedback

Field	Description	Example
integrationName	Integration Key value as displayed on Web Administration Application	
channel	SMS or Voice	SMS
language	Language code and name	See below
status	Status of the result	COMPLETED
reason	Reason of the result status	DISCONNECTED
notificationTriggered	If there were notifications sent for this result	True/False
startDateTime	Date and time when the survey started	1480588385784
endDateTime	Date and time when the survey ended	1480588385784
contextData	A key/value list of Context Data, such as UUI, AgentID, ANI	[(ANI,2342342342),(AgentID,43223)]
answers	A list of the answers to this survey result	See below

---

## Language

Field	Description	Example
code	ISO 639-x language code including country	en-us, en-gb
name	Full Name	US English, UK English

## Answer

Field	Description	Example
questionId	Survey Question identifier in UUID format.	9ca51bfe-85f2-4c8f-be38-c839d737b8e3
questionName	Survey Question Name as displayed on Web Administration Application	Gender
questionOrder	The order of the question	1
answerType	Type of answer. (OPTIONS, BOOLEAN, COMMENT, DIGITS, DATE)	OPTIONS
result	Answer result (SUCCESS, NO_MATCH)	SUCCESS
resultValue	The processed answer result.	1
inputValue	The value entered by user. Phone keypad or text in SMS channel	1 / one / yes
fileUrl	The URL where the audio file of a feedback question can be obtained.	https://<hostname>/api/v1/media/6ca51bfe-85f2-4c8f-be38-c839d737b8e3
fileSize	The audio file size in KB.	50
fileDuration	The audio file duration in seconds.	20
notificationTriggered	If a notification was triggered for this question/answer	true/false

---

## Sample Events

Following are sample events:

```
{
  "family": "EPTOMSURVEY",
  "type": "SURVEY_STARTED",
  "version": "v1",
  "genTime": "1537448583706",
  "pubTime": "1537448583722",
  "procId": "core-execution-rest-api",
  "orgId": "16dfefff-722f-413a-bc27-7d229722af55",
  "segIdx": "1",
  "data": {
    "surveyId": "16419e07-a97f-4cdc-bbfb-be69c4049a09",
    "integrationId": "5726c357-547f-4d53-8b52-56676e441fb1",
    "tenantId": "16dfefff-722f-413a-bc27-7d229722af55",
    "companyId": "1782de63-d3e4-4de6-a97f-8c2992a39266",
    "surveyName": "SurveyName",
    "integrationName": "StandaloneInt",
    "tenantName": "TenantName",
    "companyName": "CompanyName",
    "channel": "VOICE",
    "language": {
      "code": "en-us",
      "name": "US English"
    },
    "startDateTime": "2018-09-20T13:03:03.603Z"
  }
}

{
  "family": "EPTOMSURVEY",
  "type": "SURVEY_RESULT",
  "version": "v1",
  "genTime": "1537448621914",
```

```

"pubTime":"1537448621916",
"procId":"core-execution-rest-api",
"orgId":"16dfefff-722f-413a-bc27-7d229722af55",
"segId":"","
"segIdx":"1",
"txId":"44b620d4-2d0e-4a17-a9fa-ab495126a772",
"data":{
"surveyId":"16419e07-a97f-4cdc-bbfb-be69c4049a09",
"integrationId":"5726c357-547f-4d53-8b52-56676e441fb1",
"resultId":"44b620d4-2d0e-4a17-a9fa-ab495126a772",
"tenantId":"16dfefff-722f-413a-bc27-7d229722af55",
"companyId":"1782de63-d3e4-4de6-a97f-8c2992a39266",
"surveyName":"SurveyName",
"integrationName":"StandaloneInt",
"tenantName":"TenantName",
"companyName":"CompanyName",
"channel":"VOICE",
"language":{
"code":"en-us",
"name":"US English"
},
"status":"COMPLETED",
"reason":{
"reason":"SUCCESS",
"subReason":"SUCCESS"
},
"notificationTriggered":false,
"startDateTime":"2018-09-20T13:03:05.906Z",
"endDateTime":"2018-09-20T13:03:41.160Z",
"contextData":{
"AGENT_VDN":"","
"AGENT_ID":"","
"ALL_AGENT_VDNS":"","
"INTEGRATION_TYPE":"STANDALONE",

```

```

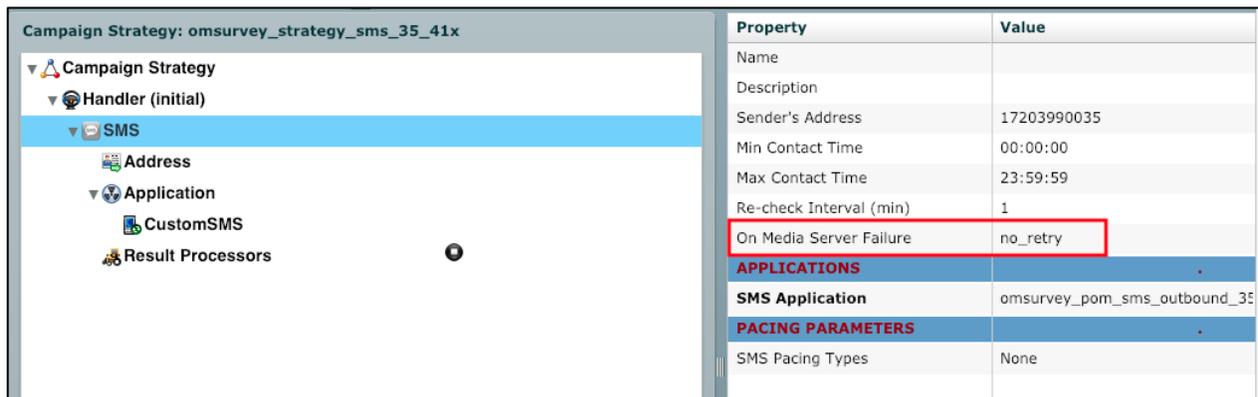
"UCID":"","
"AGENT_STATION":"","
"DNIS":"60042",
"ALL_AGENT_STATIONS":"","
"ALL_AGENTS_IDS":"","
"INTEGRATION_KEY":"60042",
"ANI":"50042",
"SESSION_ID":"mpp72pom-2018263130257-9","UUI_PLAIN":""
},
"answers":[
{"questionId":"78149a6c-0a86-4bbf-8a9d-6eaec9154d78",
"questionName":"BooleanQ",
"questionOrder":1,
"answerType":"BOOLEAN",
"result":"SUCCESS",
"resultValue":"1",
"inputValue":"1"},
{"questionId":"cffd3bbc-035a-4f2a-864d-3ed55a7f1dbf",
"questionName":"CommentQ",
"questionOrder":2,
"answerType":"COMMENT",
"result":"SUCCESS",
"resultValue":"e76ec94e-dfbf-4438-9623-4a904e4c914b",
"inputValue":"e76ec94e-dfbf-4438-9623-4a904e4c914b",
"fileUrl":"https://omsurvey-
42.avaya.arg.lab:443/media/api/v1/content/e76ec94e-dfbf-4438-
9623-4a904e4c914b",
"fileSize":75088, "fileDuration":9380}
]
}
}

```

# Appendix I

## POM Strategy for SMS Restrictions

When creating a SMS Strategy on POM, it is required to set the property **On Media Server Failure** to **no\_retry** on SMS node. Otherwise, Survey Assist cannot update Completion Code.



The screenshot shows a configuration window for a Campaign Strategy named 'omsurvey\_strategy\_sms\_35\_41x'. The left sidebar shows a tree view with 'Campaign Strategy' expanded to 'Handler (initial)' and then 'SMS'. The main area displays a table of properties for the selected 'SMS' node. The 'On Media Server Failure' property is highlighted with a red box and has a value of 'no\_retry'. Other properties include 'Name', 'Description', 'Sender's Address' (17203990035), 'Min Contact Time' (00:00:00), 'Max Contact Time' (23:59:59), and 'Re-check Interval (min)' (1). Below the table, there are sections for 'APPLICATIONS', 'SMS Application' (omsurvey\_pom\_sms\_outbound\_35), and 'PACING PARAMETERS' (SMS Pacing Types: None).

Property	Value
Name	
Description	
Sender's Address	17203990035
Min Contact Time	00:00:00
Max Contact Time	23:59:59
Re-check Interval (min)	1
On Media Server Failure	no_retry
<b>APPLICATIONS</b>	
SMS Application	omsurvey_pom_sms_outbound_35
<b>PACING PARAMETERS</b>	
SMS Pacing Types	None

Figure 43: On Media Server Failure property

## POM Campaign Strategy Samples

The following two samples illustrate a basic SMS POM strategy and a more complex strategy where both Voice and SMS channels can be used.

### Basic SMS Strategy Sample

Sample Image

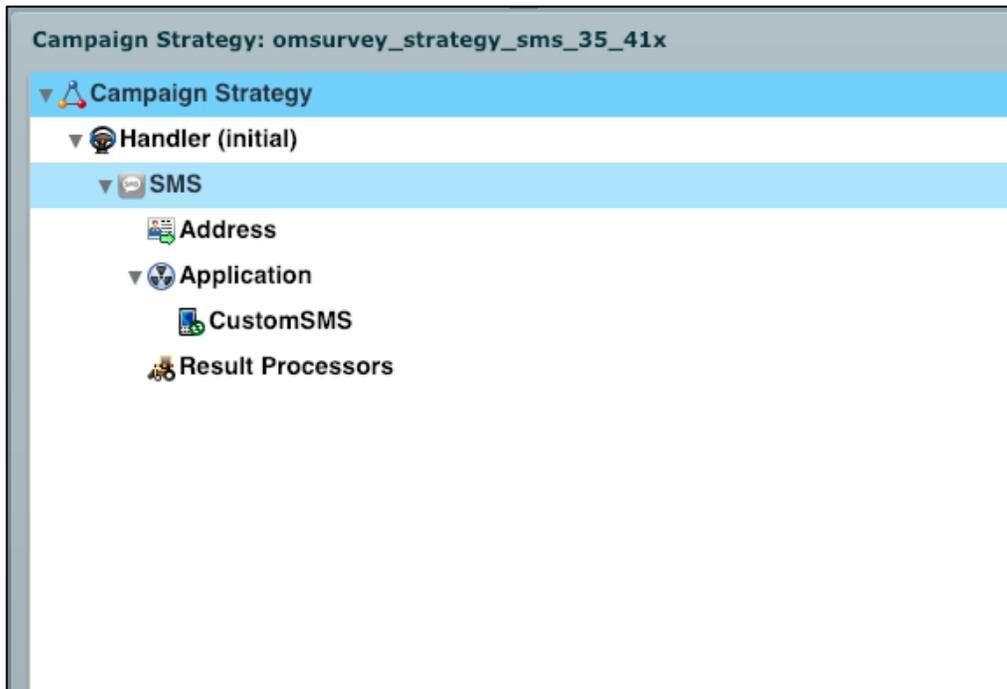


Figure 44: Basic SMS Strategy

### Strategy XML format

```

6363151599992020e1e18a8af3f38585272760680807878eaeac0c02d2d7474#<?xml
version="1.0"?>
<tns:AvayaPIMContactStrategy xmlns:tns="http://www.avaya.com/ContactStrategy"
xmlns:xsi="http://www.w3.org/2001/XMLSchema-instance"
xsi:schemaLocation="http://www.avaya.com/ContactStrategy ContactStrategy.xsd ">
  <Handler foundError="false" state="initial">
    <action OnMediaServerFailure="no_retry"
SMSApplication="omsurvey_pom_sms_outbound_35_41x" SMSPacingType="None"
foundError="false" fromAddress="17203990035" maxContactTime="23:59:59"
minContactTime="00:00:00" recheckInterval="1" type="sms">
      <address foundError="false" isBranch="false" maxContactTime="23:59:59"
minContactTime="00:00:00" weekDaysOnly="false">
        <ContactAttribute>phoneNumber1</ContactAttribute>
      </address>
      <Application>
        <CustomSMS application="omsurvey_pom_sms_outbound_35_41x"
foundError="false"/>
      </Application>
      <resultprocessors customProcessor="None" foundError="false" nextState="done"/>
    </action>
  </Handler>
</tns:AvayaPIMContactStrategy>

```

## Complex two Channels Strategy Sample

### Sample Image

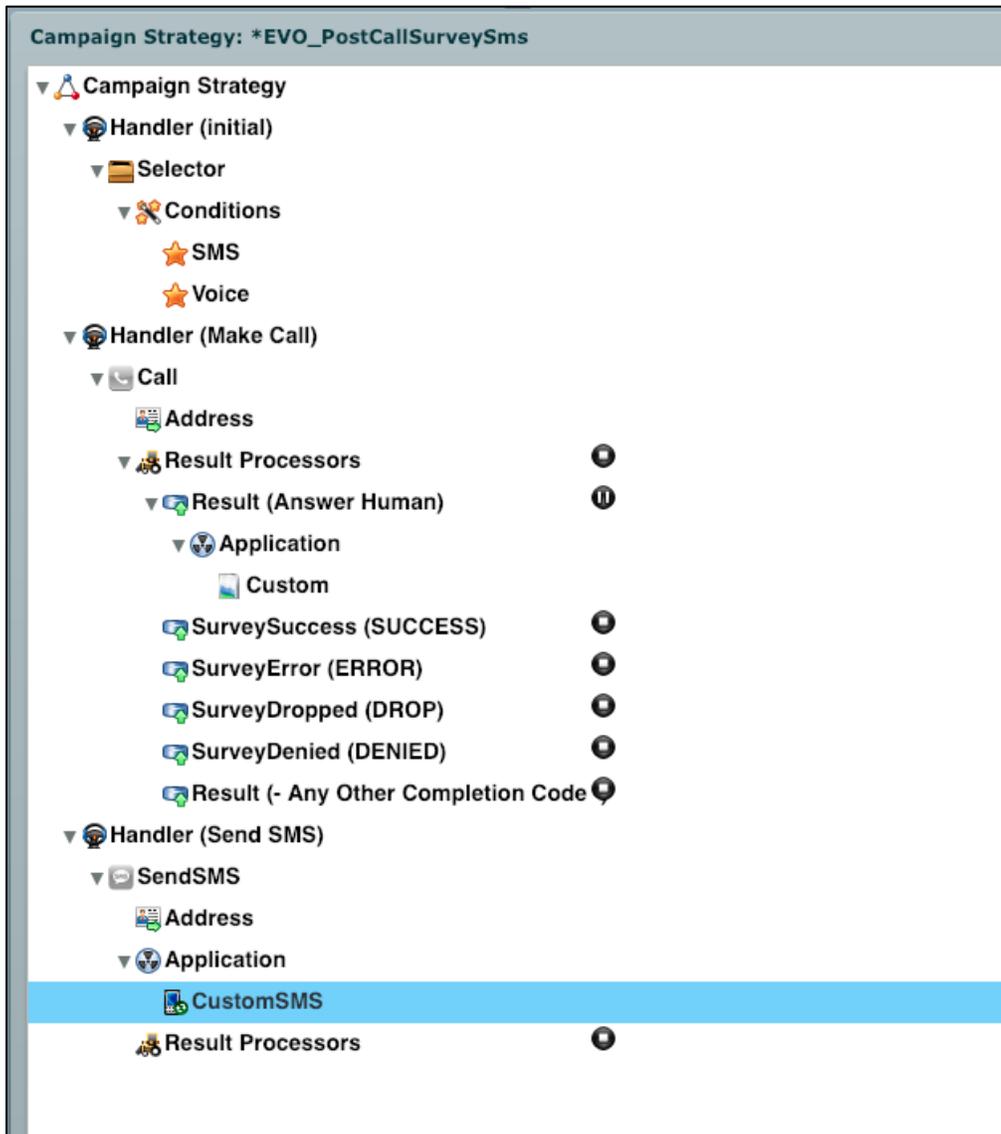


Figure 45: Complex POM Strategy

### Strategy XML format

```

c4c4c6c684846868646472721010606b6b65a5a43431010efefa7a737379c9c#<?xml
version="1.0"?>

<tns:AvayaPIMContactStrategy xmlns:tns="http://www.avaya.com/ContactStrategy"
xmlns:xsi="http://www.w3.org/2001/XMLSchema-instance"
xsi:schemaLocation="http://www.avaya.com/ContactStrategy ContactStrategy.xsd ">

  <NotificationText defaultlang="en-us" foundError="false" id="1">

    <textItem foundError="false" isBranch="false" language="en-us"
subject="PostCallSurvey">

      <text>This is your survey call. The survey mode is $SurveyMode$. The Survey name is,
$SurveyName$. The Agent ID is,$AgentID$. Thank you.</text>

    </textItem>
  </NotificationText>

  <Handler foundError="false" state="initial">

    <selector defaultNextState="OtherMode" foundError="false">

      <conditions attribute="SurveyMode" foundError="false" type="Contact">

        <case foundError="false" name="SMS" nextState="Send SMS" operator="Contains"
value="sms"/>

        <case foundError="false" name="Voice" nextState="Make Call" operator="Contains"
value="voice"/>

      </conditions>

    </selector>

  </Handler>

  <Handler foundError="false" state="Make Call">

    <action CallPacingType="None" DriverApp="PomDriverApp" EnhancedCCA="ON"
OnMediaServerFailure="retry" allocationType="1" foundError="false"
fromAddress="18662649747" guardTime="Disable" priority="5" type="call">

      <address foundError="false" isBranch="false" weekDaysOnly="false">

        <ContactAttribute>phoneNumber1</ContactAttribute>

      </address>

      <resultprocessors customProcessor="None" foundError="false" nextState="done">

        <result foundError="false" nextState="wait" value="Answer_Human">

          <Application foundError="false">

            <Custom application="PostCallSurveyVoice" campaignCallBack="Enable"
canCancelCallBack="Enable" foundError="false" generalCallBack="Enable"
prefAgentCallback="Enable" strictAgentCallback="Enable"/>

```

```

<Handler foundError="false" state="Send SMS">
  <action OnMediaServerFailure="retry" SMSApplication="PostCallSurveySms"
  SMSPacingType="None" foundError="false" fromAddress="18662649747"
  name="SendSMS" type="sms">
    <address foundError="false" isBranch="false" weekDaysOnly="false">
      <ContactAttribute>phoneNumber1</ContactAttribute>
    </address>
    <Application>
      <CustomSMS application="PostCallSurveySms" foundError="false"/>
    </Application>
    <resultprocessors customProcessor="None" foundError="false" nextState="wait">
      <result foundError="false" nextState="wait" nextStateAfter="60" value="SMS_Sent"/>
      <result foundError="false" name="SurveySuccess" nextState="done"
  value="Survey_Success"/>
      <result foundError="false" name="SurveyError" nextState="done"
  value="Survey_Error"/>
      <result foundError="false" name="SurveyDropped" nextState="done"
  value="Survey_Dropped"/>
      <result foundError="false" name="SurveyDenied" nextState="done"
  value="Survey_Denied"/>
      <result foundError="false" name="SMS Queued" nextState="wait"
  value="SMS_Queued"/>
      <result foundError="false" name="SMS Delivered" nextState="wait"
  value="SMS_Delivered"/>
      <result foundError="false" name="SMS Buffered" nextState="wait"
  value="SMS_Buffered"/>
    </resultprocessors>
  </action>
</Handler>

<Handler description="Catches contacts with incorrect Mode attribute values"
  foundError="false" name="OtherMode" state="OtherMode">
  <selector defaultNextState="done" foundError="false" name="OtherModeSelector">
    <conditions attribute="SurveyMode" foundError="false" type="Contact">

```

---

## Related resources

The following table lists the documents related to Survey Assist. Download the documents from the Avaya Support website at <http://support.avaya.com>.

Title	Use this resource to:	Audience
<b>Maintenance</b>		
<i>Installation Guide</i>	Install the Survey Assist product.	Users
<i>Hardware and Software Specifications Guide</i>	Configure the Survey Assist hardware and software requirements during deployment.	