

KINETIC SR (Survey and Request)



Integration Guide Version 5.0

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KINETIC DATA



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Chapter 1

WELCOME

This guide discussed the process for integrating Kinetic SR™ and Kinetic Request™ (Kinetic SR) with other applications within your BMC Remedy® Action Request System (AR System) environment. By integrating Kinetic Request on the front end of the user experience, and Kinetic SR on the back end can significantly improve your customers experience and interactions with an IT Help Desk, Customer Support Center or other point of contact.

Traditionally, there are two points that integrations take place. First, is an existing AR System application wants to trigger a survey (Kinetic Survey) or send a form (Kinetic Request) to a customer.

TRIGGERING FORMS OR SURVEYS

Integrating an application into Kinetic SR to trigger surveys or forms involves:

- Installing Kinetic SR
- Writing simple filters, based on given examples
- Adding shared fields to your form
- Attaching your form(s) to existing workflow

Then, you can create events and rules to tie events within your application to one or more templates via the one of the manager consoles. You can also create one-time and scheduled batch integrations for specific campaigns, data validation, or other situations.

These types of integrations will be termed **Inbound** in this guide.

CREATING RECORDS

After a form is submitted, Kinetic Request (this ability is not a part of Kinetic Survey) has the ability to create one or more records in any AR System form.

This is accomplished through mapping elements from your Service Item to an AR System form via a Task in the Kinetic Request Service Catalog Console. No workflow needs to be written to accomplish this. However, some configuration is required including:

- Adding an outgoing “Integration Source” via the Integration Manager dialog.
- Creating a Task, qualification indicating when/if to create the record and mappings to the external form.

These types of integrations will be termed **Outbound** in this guide.

There are situations where you have multiple tasks dependent on each other and may require additional workflow. Example:

1. You have an approval that fires when a request is submitted
2. You have a Help Desk ticket that is created when a request is approved
3. After your Help Desk ticket closes you want to send information to an external application to place an order.

In this situation, the Help Desk ticket will need to send information back to the Kinetic Request task that created it, indicating it has closed. This process does require a filter or other workflow be written on the destination form to push back into Kinetic Request.

The task that spawned the Help Desk ticket contains the Request ID of the ticket it created, so it is easy to connect these events together.

Requirements

The Kinetic SR integration package has the same hardware and software requirements as Remedy AR System 6.0. See the Remedy AR System documentation for more information.

Before the installing Kinetic SR integration package, complete the following:

- Install Remedy AR System Server 6.0 or greater
- Install Kinetic SR.

Conventions

In these procedures, follow these conventions:

- *Italicized* words are variables for which you will substitute your actual path of file names.
- File names are in **bold** type.

IMPORTANT

This manual is intended for AR System administrators.

Who should read this manual?

The audience for this manual is Remedy AR System administrators. The administrator installing and configuring a Kinetic SR integration should have a good understanding of the Kinetic SR application.

SUPPORT

For customer service support, go to the support section of our Web site <http://www.kineticdata.com> or call 651-695-8566.

Chapter 2

WORKING WITH INBOUND INTEGRATIONS

INTEGRATION PROCESS CONCEPTS

Before integrating your existing application into Kinetic SR within the Kinetic SR Integration package, familiarize your self with these concepts.

INTEGRATION EVENTS

Integration Events are situations that occur that trigger a survey or form. They include a qualification that determines whether or not the ticket should be sent and what the trigger mechanism is to check the qualification.

The following are trigger mechanisms:

Trigger	Description
Active Link	<p>This type of integration will pop a survey dialog for a user while in another AR System application. This type of integration is typically used for simple call scripting or “mini surveys”.</p> <p>For example: A user selects a category of “Hardware” and a survey with three Hardware specific questions opens.</p> <p>You (the AR System Administrator) define at what point in the user processing this qualification is checked. For example on user selection of “Category” or on Save of a record.</p>
Event	<p>An event trigger is an integration that fires on the modification of a record, typically by a user.</p> <p>For example: Create a survey when the ticket status equals “Closed” and the record is saved.</p>
Batch-One Time	<p>A batch one-time integration triggers surveys or forms to a group of people at a scheduled date and time.</p> <p>For example: Surveying all Remedy AR Users to see what level of training they have.</p>
Batch-Scheduled	<p>Batch scheduled is an ongoing integration that triggers surveys or forms to a group of people.</p> <p>For example: Surveying all contacts each year on a rolling 12-month basis.</p>

RULES

Rules follow an event and, within a particular event, further determine whether a survey is sent or not. Rules are only applicable to Kinetic Survey, not to Kinetic Request.

The following rules install within the application:

Rule	Description
Multiple surveys from a single ticket	This rule is in place automatically and is not configurable without modifying the filter that enforces it. It ensures that multiple surveys are not sent from a particular ticket. This ensures that multiple surveys on the same issue or event do not inundate customers or contacts. Note: This rule is not used for Batch integrations.
Survey Count	Only X number of events generates this survey. For example: To survey every fifth event, add five (5) to Rule value.
Minimum Survey Frequency	Wait x number of days between surveying an email address. For example: If you would like to wait ten days between surveys to a customer, add a Rule Value of ten (10).
Survey Limit	Specifies a maximum value of surveys that will be generated. Once the maximum number is reached, no remaining surveys will be processed.

DATA SETS

A Data Set helps both the AR System Administrator and Users to work with Kinetic SR. Kinetic SR includes 64 generic “attribute” fields for every customer submission created. You, the AR System Administrator, determine what fields from your originating form get pushed into these attribute fields via the filter(s) you create.

These attributes will get used in message templates, in page text, in qualifications, and reporting. If they were left as generic field names, it would be difficult for you or your users to remember what type of data is in Attribute6 or Attribute62.

To solve this problem, Kinetic SR includes the concept of *Data Sets*. Data sets are nothing more than handy labels for the fields you use within a survey. Menus that reference these fields use the data set name for a field rather than the generic name. So rather than seeing “Attribute62” on a field menu, your users will see “Department” or other useful name that you give it.

You will define Data Sets that one or more surveys use via one of the Manager consoles and the Integration Manager dialog later in this guide.

INITIAL SET UP

Kinetic SR integration sample

The integration sample form, KS_SRV_IntegrationSample, demonstrates how to integrate your applications to Kinetic SR. It includes the display-only fields that must be included on any integrated form. This is the primary form of the shared workflow that attaches to your form(s).

Figure 1 Screen clip: Kinetic SR--Integration Sample

- In the Kinetic SR—Integration Sample form, you can fill out a simple “Help Desk” ticket to see how the integration process works.
- The fields on the Integration Fields tab are shared fields to be copy and pasted onto the form to be integrated.
- The Results tab shows how a completed survey, done through an active link integration, could be viewed from a Help Desk scenario. This is especially useful for call scripting.

MANAGER CONSOLE UPDATE

By default, the Integrations tab on either of the consoles is visible to the **Survey Integrators** group. This allows some Licensed Authors/Managers to create qualifications and set rules for integration to surveys.

If a poorly written qualification executes against a large form, this does allow for possible performance issues. If it is more appropriate, alter permissions to restrict access to Administrator by removing the KS_SRV_Integrator group from the integration page field.

To update one/both Manager Consoles

- From the KS_SRV_Manager/KS_RQT_Manager forms, using the AR System Admin Tool, hide the Integrations tab on the Kinetic SR Manager.

OR

- Change permissions on this tab to a group applicable to your environment.

INTEGRATING YOUR FORM (EVENT & BATCH)

Integrating your form involves three steps:

1. Add shared fields
2. [Attach shared workflow](#)
3. [Create simple filters based on template](#)

Add shared fields

To add shared fields

1. Using the AR Admin tool, to the form you are integrating to, add shared fields.
2. Verify that the field ID's used on the shared fields do not overlap with fields on your form.

The following are the shared fields. All are display-only fields except where indicated:

IMPORTANT NOTE

Make sure the field IDs remain the same when copying fields. This is important to use the shared workflow.

Field	Field ID	Description
_SurveyID	700002004	Used to temporarily store the survey ID to be fired
_SurveyName	700002005	Used to temporarily store the survey/service

		item name to be fired
_EventName	700002007	Used to temporarily store the Event that is triggering the survey/form
_TempID	700002003	Used to temporarily store the triggering event ID If there is more than one trigger event, this identifies the next highest triggered Event ID triggered.
_FireQualString	700002006	Used to temporarily store the firing qualification. In an External qualification, this determines whether the record meets the necessary qualification.
_OperationID	700002012	This operation ID is used to track any customer submission records created out of this specific event.
_IntegrationID	700001560	The instanceID of the Integration created from the Manager console form.
_MappingDataSet	700000829	The name of the data set used for the integration.
_CustomerSurveyStatus	700000831	Used for Active Link integration in determining whether to show a survey/call script to the user.
_CustomerSurveyURL	700000833	Used by Active Link integration in building the URL of the survey/call script to open.
CustomerSurveyInstanceID	700000830	Used by Active Link integration to hold the instanceID of the survey that was created. This is a true data field.

3. Copy the above fields from KS_SRV_IntegrationSample onto your form.

NOTE: If you do not plan on doing any Active Link integrations, you do not need to copy the _CustomerSurveyStatus, _CustomerSurveyURL, or the CustomerSurveyInstanceID fields.

4. Save your form before going on to the next step.

Attach shared workflow (filters and filter guides)

To attach shared workflow

1. Attach a number of filters and a filter guide to your form in order to use the integration process. This workflow is attached already to the KS_SRV_IntegrationSample and KS_SRV_FormEventInstance forms.

IMPORTANT NOTE

The workflow attached to your integrated form begins working immediately on the save of every record on the form. While this process is taking place, ensure users are not updating records or some user errors or odd behavior could occur.

To help you integrate your own form, it is helpful to view what is happening on these forms. You can view a partial list of workflow.

2. To view a partial list of workflow
 - a. From the AR Admin tool menu select:
View-> By Form
 - b. Select:
KS_SRV_IntegrationSample
 - c. Select:
KS_SRV_FormEventInstance

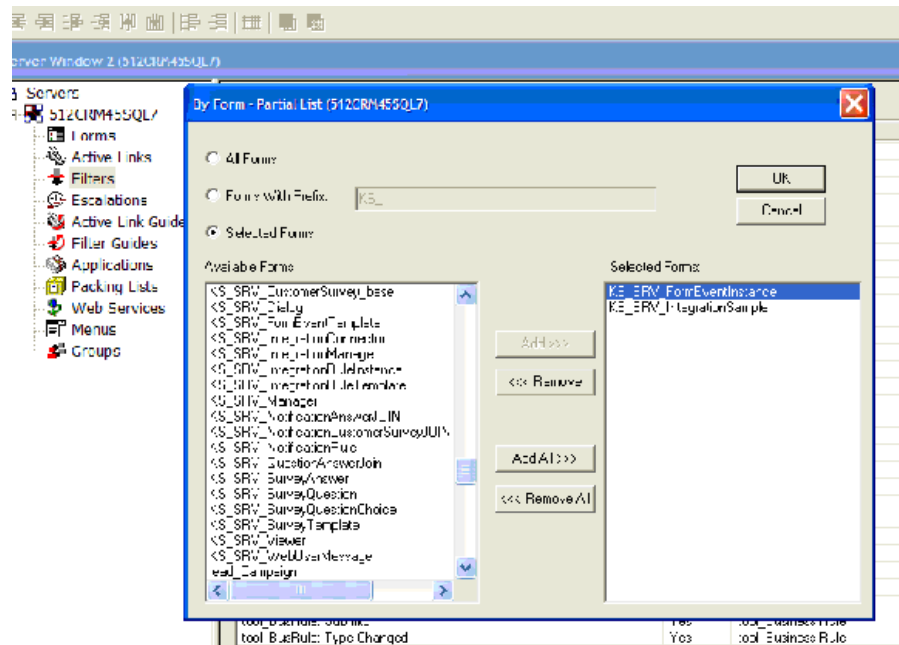


Figure 2 Screen clip: View By Form dialog

3. To close the dialog, click **OK**.
4. Navigate to view the filters for `KS_SRV_IntegrationSample`.
The filters attached to these two forms appear.
5. To select the following filters, right-click:
 - `KS_SRV_INTEGRATION_CheckIfSurveyNeedsToFire00`
 - `KS_SRV_INTEGRATION_CheckIfSurveyNeedsToFire01`
 - `KS_SRV_INTEGRATION_CheckIfSurveyNeedsToFire02`
 - `KS_SRV_INTEGRATION_FireSurvey`
 - `KS_SRV_INTEGRATION_LoopNext99`

A menu appears.

6. Choose **Edit**.
This allows you to edit some properties from multiple filters within a single window.

A filter modification window opens.

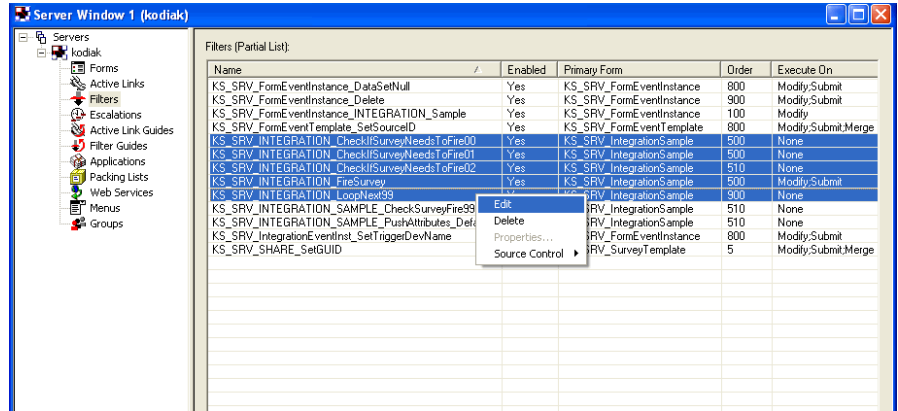


Figure 3 Screen clip: Filters (Partial List) -- Partial list of filters, selected and ready to attach to your new form

7. On the Filters (Partial List) dialog, select your forms from the list of Forms.
8. Save the filter.

This updates all of the filters highlighted and attaches them to your new form.

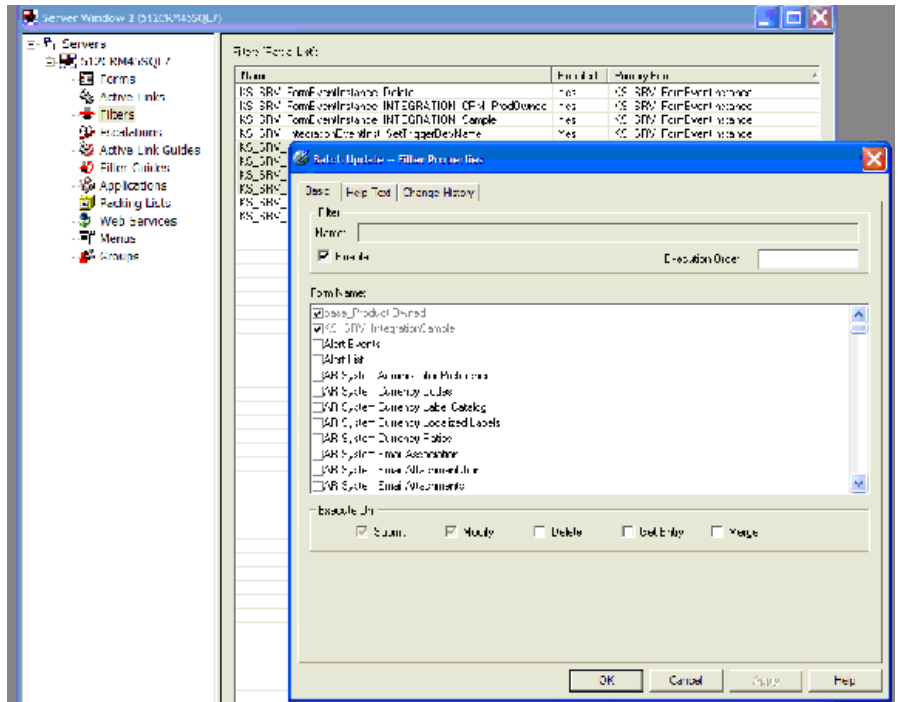


Figure 4 Screen clip: Filter Batch Update screen

9. To select your form to be integrated from the Filter Batch Update screen, check the box next to the form.

NOTE

The KS_SRV_IntegrationSample form, and possibly others, is already checked.

Create simple filters based on template

After attaching the shared workflow, you must create two simple filters to push the appropriate data from your form into the Kinetic SR Integration forms.

To create simple filters based on template

- Create three filters to push the appropriate data into the Integration forms.
1. **Filter 1: Testing the Integration Qualification**—This filter, if passing your qualification, will push some basic information into a “connector” form which will test all of the rules associated with the integration. The filter you will create is based on the **KS_SRV_INTEGRATION_SAMPLE_CheckSurveyFire99`!**, that is attached to the Sample Integration form.

The top screenshot shows the 'Basic' tab of the 'Modify Filter' window. The filter name is 'KS_SRV_INTEGRATION_SAMPLE_CheckSurveyFire99`!' and the execution order is 510. The 'Form Name' list includes 'KS_SRV_IntegrationSample' (selected), 'Alert Events', 'Alert List', 'AR System Administrator Preference', 'AR System Currency Codes', 'AR System Currency Label Catalog', 'AR System Currency Localized Labels', 'AR System Currency Ratios', 'AR System Email Association', 'AR System Email Attachment Join', 'AR System Email Attachments', and 'AR System Email Error Logs'. The 'Execute On' options are 'Submit', 'Modify', 'Delete', 'Get Entry', and 'Merge'. The 'Run If' section contains a logical expression: `[!_EventName] = $NULL$) AND ([!_FireQualString' = "Batch Update")] OR [EXTERNAL!_FireQual`.

The bottom screenshot shows the 'Action' tab. The 'Current Action' is 'Push Fields'. The 'Push Field' section is configured with 'Server Name' set to '512CRM45SQL7' and 'Push Value To' set to 'KS_SRV_IntegrationConnector'. The 'Push Field If' section has the expression `1 = 0`. The 'If No Requests Match' action is 'Create a New Request' and the 'If Any Requests Match' action is 'Take No Action'. The 'Fields' section is set to 'Custom' and shows a table of fields to be pushed:

Field Name	Value
Survey Name	\$_SurveyName\$
Survey ID	\$_SurveyID\$
OriginatingID	\$_RequestID\$
Last Name	\$_LastName\$

Figure 5 Screen clip: Filter:
 KS_SRV_INTEGRATION_SAMPLE_CheckSurveyFire99`!

EXAMPLE

Save the filter as
 KS_SRV_INTEGRATION_<<
 MY_FORM_NAME>>_CheckS
 urveyFire99`!. Also, be sure to
 keep the back tick-exclamation
 point (`!). This forces the push
 field's action to happen
 immediately in the filter
 phasing cycle.

- a. Open the filter:
KS_SRV_INTEGRATION_SAMPLE_CheckSurveyFire99`!,
- b. Save this filter as your own using the **Save As** command. It is a good idea to name the filter something similar to the existing sample filter.
- c. Take a look at the filter. The Run-If condition will remain the same for your new form, as the fields referenced are the display only shared fields added to your form earlier. The If Action pushes data from your form to the KS_SRV_IntegrationConnector form.
- d. Change the form on the filter from KS_SRV_IntegrationSample to your own form. You will get a warning about changing forms. This is normal.
- e. Select the appropriate fields from your form that will eventually fill in the Kinetic SR fields, if all of the survey rules are met. Examples include: First Name, Last Name, Contact_Info_Value (typically email address), and some ID fields.

Note: It is best to use an Instance ID field to map to the Originating ID field, rather than Request ID, as that field will not be populated during the creation of a ticket.

2. Filter 2: Pushing the attributes—This filter will push the other data you may want to send regarding this ticket. Kinetic SR includes a set of 64 generic “attribute” fields. These fields are used to store data that you may want to use to personalize emails (such as first/last name), include in the header of your page (such as issue description, date of interaction) or for reporting (such as assigned agent, direct report, employee ID). Think about the information you may want for this situation or other future situations, so that your workflow does not need to be changed in the future.

This filter will be based on:

KS_SRV_INTEGRATION_SAMPLE_PushAttributes_Default that is attached to the Sample Integration form.

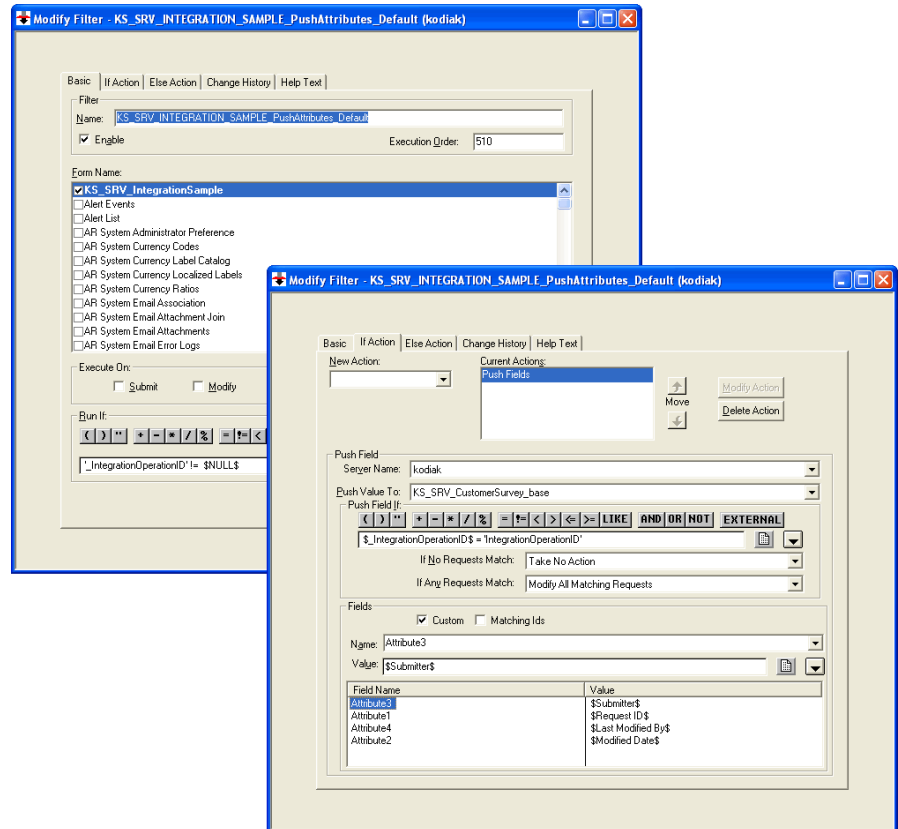


Figure 6 Screen clip: Filter:
 KS_SRV_INTEGRATION_SAMPLE_PusheAttributes_Default

- a. Open the filter:
KS_SRV_INTEGRATION_SAMPLE_PushAttributes_Default
- b. Save this filter as your own using the **Save As** command. It is a good idea to name the filter something similar to the existing sample filter, but include the name of your form within the name of the filter.
- c. Change the form on the filter from KS_SRV_IntegrationSample to your own form. You will get a warning about changing forms. This is normal.
- d. On the “If Action” tab, start mapping in the fields you wish to push to Kinetic SR. Use the attribute fields (1-64) to hold information from your form. You do not need to re-map fields you already pushed in the previous filter you created such as first/last name, email address and ID’s.

Be sure to note these fields that you are pushing. You will add this information later to a “Data Set” you create within the Remedy User Tool and the one of the Manager Consoles. See <<DATA SETS>>.

- e. Save the filter.
3. **Multiple Data Sets:** You may want to use multiple data sets in your integration (meaning in some situations you want to push one set of information from your originating form, in other situations you want to send other information). You can handle this situation by creating more than one of the above filters
(**KS_SRV_INTEGRATION_SAMPLE_PushAttributes_Default**).

NOTE: Adding multiple data sets adds a level of complexity to your reporting and management of your submissions. Only use multiple data sets if you have large sets of data that are very different in different situations. Having one single data set (that combines the data you use from your form) does make the overall data stored in Kinetic SR larger, but can allow for more situations where reporting across templates is possible.

If you do want to use multiple data sets, use the following procedure:

- a. Within the filter you just created
(**KS_SRV_INTEGRATION_SAMPLE_PushAttributes_Default**), add the data set to the “Push Field If” qualification that this mapping of data represents. The name of the data set (“Default” in the example) represents the name of the data set you configure via the Remedy User Tool and Kinetic SR Integration Manager.
<<SEE DATA SETS>>

The screenshot displays the configuration for a 'Push Fields' action. The 'Push Field If' section is expanded, showing a qualification expression: `$_IntegrationOperationID$ = 'IntegrationOperationID' AND 'Data_Set'='Default'`. Below this, there are dropdowns for 'If No Requests Match' (set to 'Take No Action') and 'If Any Requests Match' (set to 'Modify All Matching Requests'). The 'Fields' section is also visible, showing a table with columns 'Field Name' and 'Value'. The table contains two rows: 'Attribute3' with value '\$Submitter\$' and 'Attribute1' with value '\$RequestID\$'.

Field Name	Value
Attribute3	\$Submitter\$
Attribute1	\$RequestID\$

Figure 7 Screen clip: Push Qualification for **KS_SRV_INTEGRATION_SAMPLE_PushAttributes_Default** filter

- b. Change the Suffix on the filter to include the name of the data set for easier identification (currently “Default” in this example).

- c. Save the filter.
- d. Save the filter again, with a new name, and a suffix representing the next data set using the **Save As** command.
- e. Change all of the fields being pushed to represent the new data set.
- f. Change the “Push Field If” qualification to include the name of the new data set.
- g. Save the filter
- h. Repeat this process for each data set being used from this form.

More filters for adding additional information

If you are integrating a form that does not have all of the information you need for your situation, such as an email address, you can add one or more filters to set this information into your form and include it in the integration processing.

IMPORTANT

Do not add any Execute-On conditions. Later, this filter adds into a filter guide later to handle the execution situation,

EXAMPLE

You can set an email address from your Contacts form.

To create a set fields filter

1. Using the Remedy Administrator Tool, create a new filter.
2. To easily view this filter in conjunction with the other Kinetic SR filters you have attached or created, name it using the same conventions as the other filters:

`KS_SRV_INTEGRATION_<Form>_<Action being taken>`.

3. Select your form from the list of forms.

You can add some run-if conditions, such as to only run if the needed information is not present:

```
if "$Email$=$NULL$"
```

4. On the If Action tab, add your set fields actions.
5. Save the filter.

Updating the Integration Filter Guide

Add your new filter(s) to the filter guide that controls the integration between your application and Kinetic SR.

To update the filter guide

1. Navigate to your Filter Guides

Within the View By Form mode, only one is visible:

- Filter Guide to Update:

KS_SRV_INTEGRATION_CheckForSurvey

Modify Filter Guide - KS_SRV_INTEGRATION_CheckForSurvey (kodiak)

Basic | Filters | Change History | Help Text

Guide

Name: KS_SRV_INTEGRATION_CheckForSurvey

Label: KS_SRV_INTEGRATION_CheckForSurvey

Description: Checks to see if a survey needs to be sent

Form Name:

- KS_SRV_IntegrationSample
- Alert Events
- Alert List
- AR System Administrator Preference
- AR System Currency Codes
- AR System Currency Label Catalog
- AR System Currency Localized Labels
- AR System Currency Ratios
- AR System Email Association
- AR System Email Attachment Join

Figure 8 Screen clip: Modify Filter Guide

2. Add your form to the Filter Guide by selection the check box next to your form.
3. Click the **Filters** tab of the filter guide.
This displays which filters this guide uses.

NOTE:

The shared filters attached to your form earlier are included. In addition, some labels included show you what place to include your newly created filter(s).

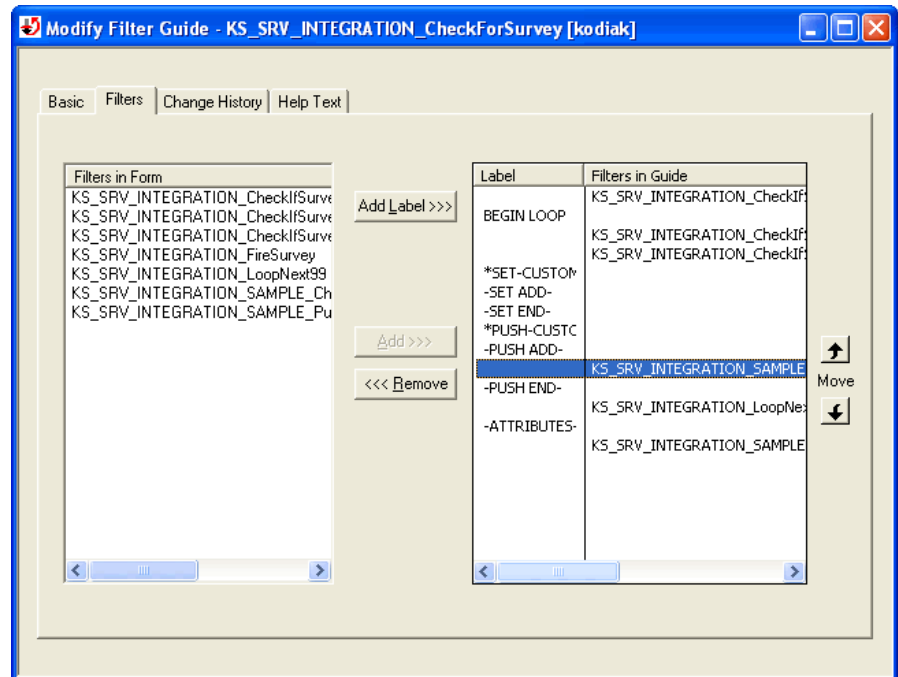


Figure 9 Screen clip: Modify Filter Guide-Add in new filters

4. From the table at the left:
 - a. Select the first filter you created (based on KS_SRV_INTEGRATION_SAMPLE_CheckSurveyFire99!).
 - b. Add the filter to the table on the right, by clicking **Add**.
This inserts the filter into the filter guide.
 - c. Using the arrows, verify the new filter is included between the labels PUSH ADD and PUSH END.
5. From the table at the left:
 - a. Select the “Attributes” filter(s) that you created (based on KS_SRV_INTEGRATION_SAMPLE_PushAttributes_Default).
 - b. Add the filter(s) to the table on the right, by clicking **Add**.
 - c. Using the arrows, verify the new filter(s) fall after the - ATTRIBUTES- label.
6. If you have additional filters to handle setting of values that needed for the submission, but are not included on the integrated form, add them between the SET ADD and SET END labels in the same way you added your push filter.

Example: Your “Issue” form does not contain an email address field. You would write a filter to set this information from a form that does hold this data, and place the filter in this filter guide.

7. Save the filter guide.

You have now completed the steps for “Event” integrations.

Batch update filter

To enable batch integrations, such as for data validation, one other filter must be created. When a batch integration is scheduled, this filter pushes a trigger to the newly integrated form.

To create your batch updated filter

1. Open the existing filter:

KS_SRV_FormEventInstance_INTEGRATION_Sample.

2. Save this filter as:

KS_SRV_FormEventInstance_INTEGRATION_<YourFormName>.

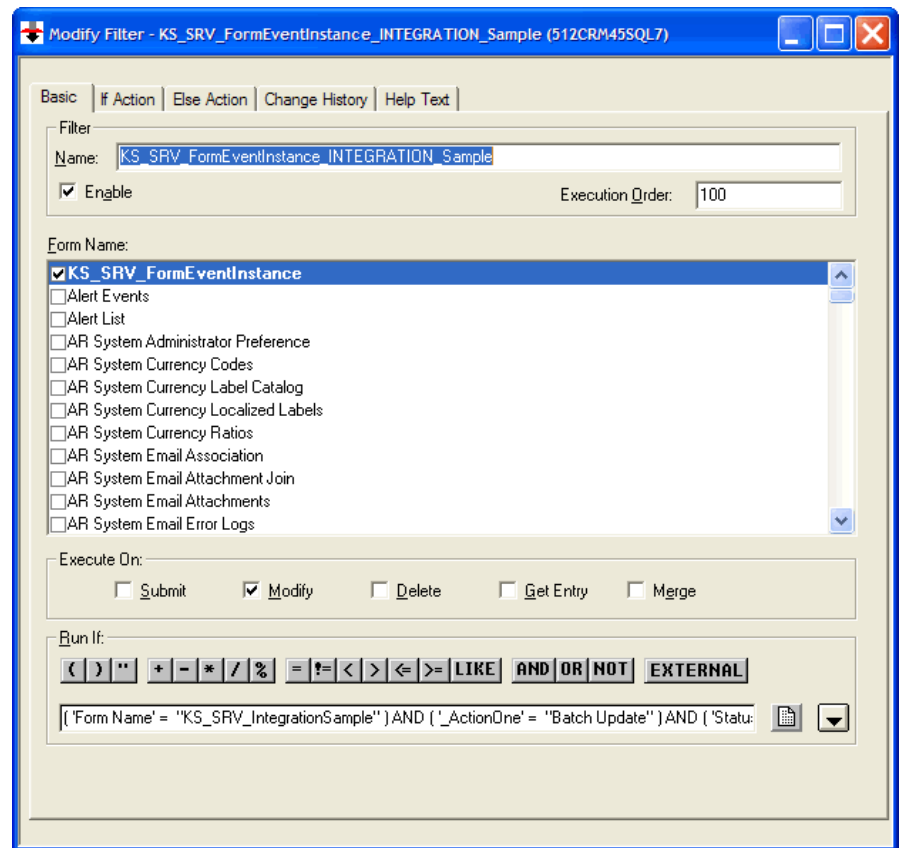


Figure 10 Screen clip: Sample Batch Integration filter

3. On the Run If condition, change the Qualification to reflect your form name, rather than Form Name='KS_SRV_IntegrationSample.

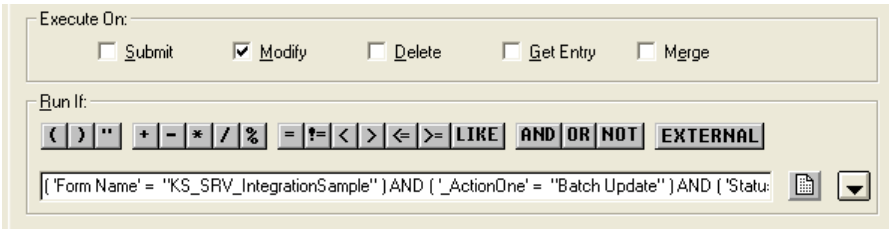


Figure 11 Screen clip: Run-If Condition to Change

- 4. Change the If Action Push Action, to push to your form,.rather than the *KS_SRV_IntegrationSample* form.

The fields pushed are shared fields and should not be changed.

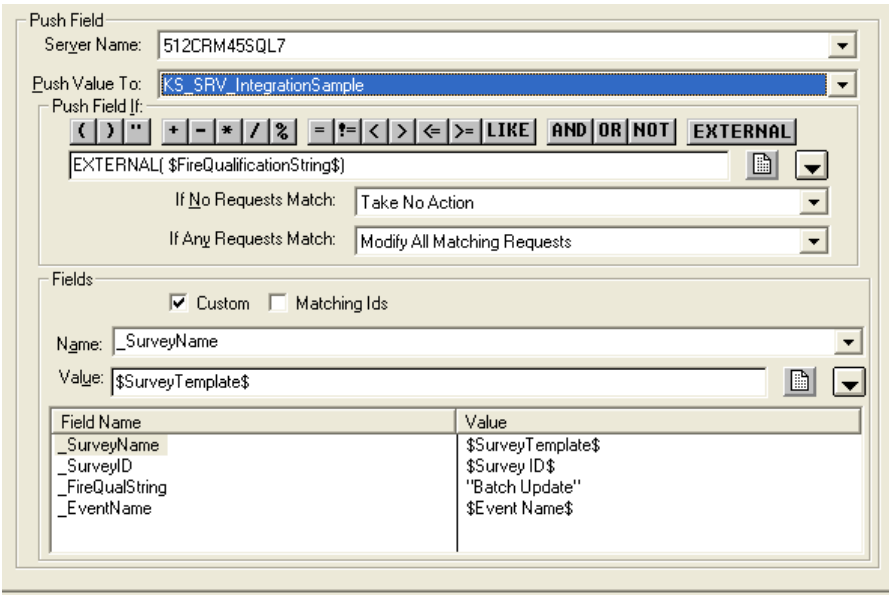


Figure 12 Screen clip: Push Action to Change

- 5. Save the filter.

The Integration Manager

Once the workflow side of the integration is complete, manage the remainder of integrating your application to a survey or form with the Remedy User Tool.

The administrator has access to the Integration Manager, where forms are added, rules and qualifications added, data sets and mappings managed and more.

NOTE

The Integration Manager form is only accessible by Remedy Administrators. Survey Managers/Request Managers with Survey Integrator group permissions can access some integration functionality from the Integration tab on the Manager Consoles.

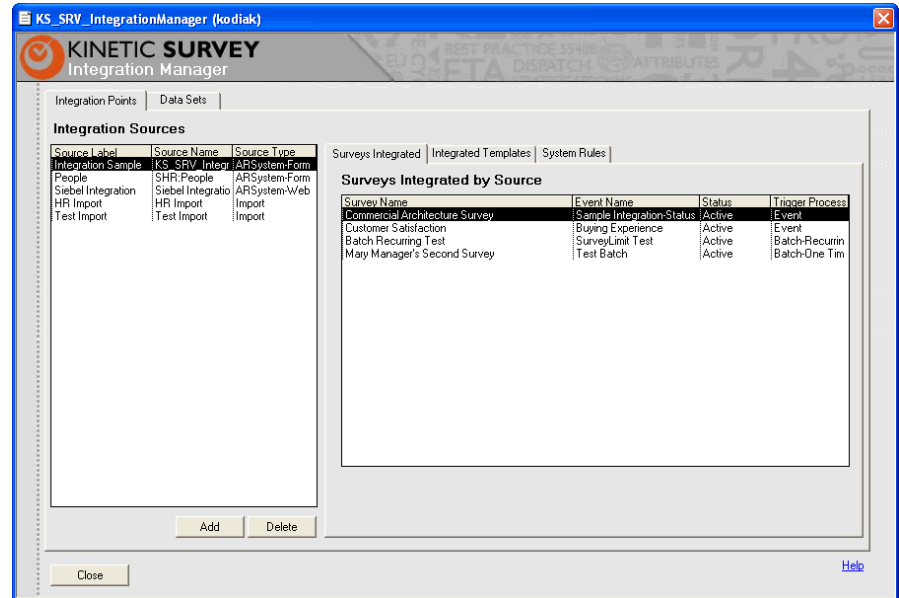


Figure 13 Screen clip: Integration Manager form

To access the Integration Manager

1. Using the Remedy User Tool, access one of the Manager Consoles.
2. On the left margin, click the **Integration Manager** link.

The Integration Manager form opens as a dialog.

You can now add in the new form into the Kinetic SR integration configuration.

To add the newly integrated form/application

1. On the Integration Manager form, under the Integration Sources table, click **Add**.
2. From the Source Type menu, select ARSystem-Form. This dialog is also used to track other data sources coming into Kinetic SR such as web services, using the list manager, and simple imports.

3. From the drop down menu of all forms installed on your AR System server, in the Form Name field, type a form name.
4. If your form name is not a user-friendly name, you can add an alias or more easily understood form name. In the Form Label field, type a form label.
5. Optionally add one or more workflow items into the Workflow Item field. This is to help you keep track of the filters you create to integrate to Kinetic SR.

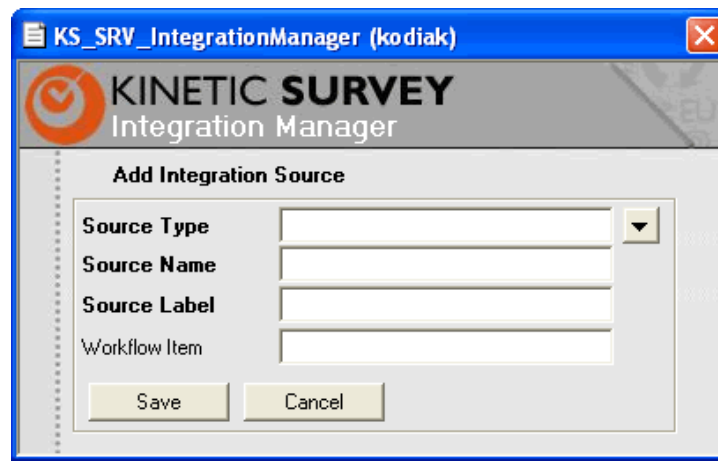


Figure 14 Screen clip: Add Integrated Form dialog.

Now, your form easily can trigger one or more surveys within Kinetic SR.

SETTING UP DATA SET MAPPINGS

A Data Set and its mappings help both the AR System Administrator and Users to work with Kinetic SR. As discussed earlier, Kinetic SR includes 64 generic “attribute” fields for every customer survey created. These attributes will get used in message templates, in survey text, in qualifications, and reporting. If they were left as generic field names, it would be difficult for you or your users to remember what type of data is in Attribute6 or Attribute62.

To solve this problem, Kinetic SR includes the concept of *Data Sets*. Data sets are nothing more than handy labels for the fields you use within a survey. Menus that reference these fields use the data set name for a field rather than the generic name. So rather than seeing “Attribute62” on a field menu, your users will see “Department” or other useful name that you give it.

A survey can have only one data set. However, in your entire Kinetic SR application, you will likely have a number of data sets. Some data sets will

apply to many different surveys; others will be specific to one. If no Data Set is selected by the Survey author, the “SYSTEM_DEFAULTS” Data Set will be used.

While creating a Data Set for a specific integration that you have constructed, it is a good idea to have the filter you created to reference what fields from your originating system are pushed into fields on Kinetic SR.

To create a Data Set

1. Open the Integration Manager from the **Integration Manager** link on the left side of the Survey Manager console.
2. Click on the **Data Sets** tab.

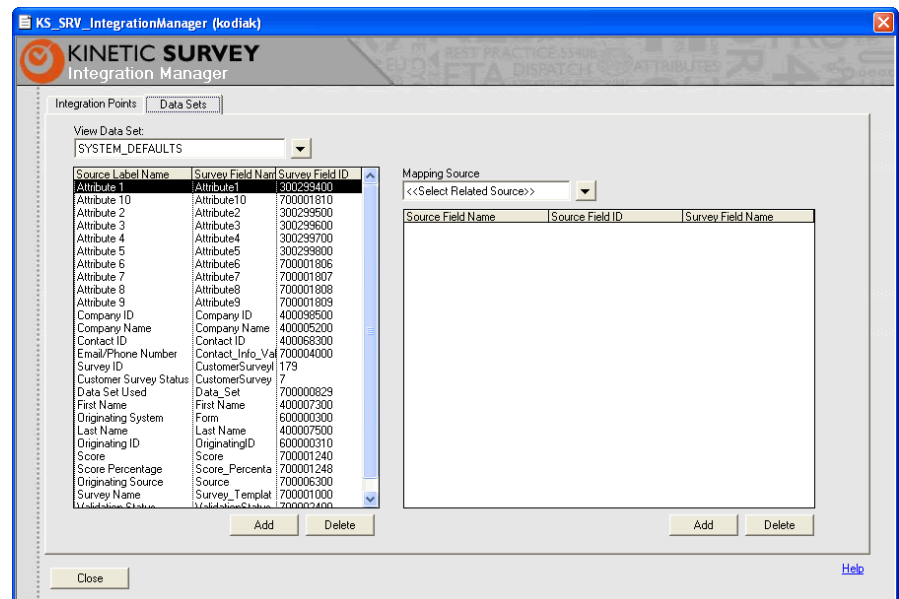


Figure 15 Screen clip: Integration Manager-Data Sets

3. You will see the “SYSTEM_DEFAULTS” Data Set displayed. Click on the **Add** button below the Data Set table. The Data Set Item dialog appears.
4. Type in a new name for your **Data Set**, or use the menu to select an existing Data Set if you are adding a new item.

TIP

Keep in mind that the Field Labels you create now may be for a specific integration, but Data Sets can be used for more than one integration. Keep your Field Label generic enough to be used for other integrations, but specific enough that they are useful to your users.

The screenshot shows a window titled "KS_SRV_IntegrationManager (kodiak)" with a close button in the top right. Below the title bar is a header with the "KINETIC SURVEY" logo and the text "Data Set Item". The main area contains a form with the following fields:

- Survey Field** (Section Header)
- Data Set**: A dropdown menu with "SYSTEM_DEFAULTS" selected.
- Field Label**: An empty text input field.
- Survey Field Name**: A dropdown menu.
- Survey Field ID**: An empty text input field.

At the bottom of the form are two buttons: "Save" and "Close".

Figure 16 Screen clip: Integration Manager-Data Sets

5. Type a name for your **Field Label**. This will be the label that users see for the Survey Field Name selected in the next step. This will represent one of the fields you are pushing into Kinetic SR if you are creating this for a specific integration.
6. Select a **Survey Field Name** that the Field Label will apply to. The Survey Field ID is automatically populated.
7. Click **Save**.
8. Repeat this process for each field that is a part of your Data Set. Keep in mind to create items for any generic "attribute" fields, but also create data set items for the standard fields, as well such as First Name, Last Name, Company, and other fields that you want made available to users. Refer to the SYSTEM_DEFAULTS Data Set for the most commonly used standard fields.

Data Set Mappings

Once your Data Set is finished, you can optionally add mappings. Remember your Data Set is just labels for your survey fields. You have not specified the actual fields that populate each Data Set Item.

Data Set Mappings allow you to track exactly what fields populate your surveys. For example, you may have both an integration from another AR System form, and a web service populating a survey using its specified Data Set. You could create both a mapping from your AR System form and a mapping from your web service to manage what fields from each system move data into your survey.

Data Set Mappings are only for reference, and are therefore optional. No filters or workflow uses the mappings. Rather they are there to help you manage your data sources. With only a survey or two, the data sources used are easy to remember. However, once your use of Kinetic SR grows,

it is possible you have many different mappings for different source of data feeding surveys.

To Create a Data Set Mapping

1. Open the Integration Manager from the **Integration Manager** link on the left side of the Survey Manager console.
2. Click on the **Data Sets** tab.
3. Select the Data Set (previously set up) that you want to map fields to from the **View Data Set** menu.

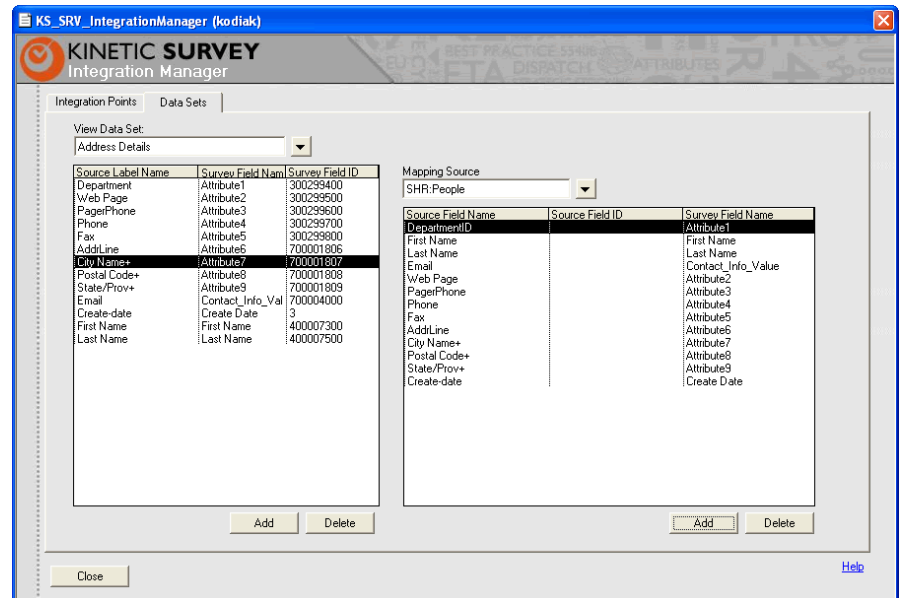


Figure 17 Screen clip: New Integration Point Dialog.

4. Click **Add** Below the Mapping Source table. The Data Set Mapping dialog appears.

The left side of the dialog under “Source Field” represents where the data is *coming from*. The right side of the dialog under “Survey Field” represents where the data is *going to*.

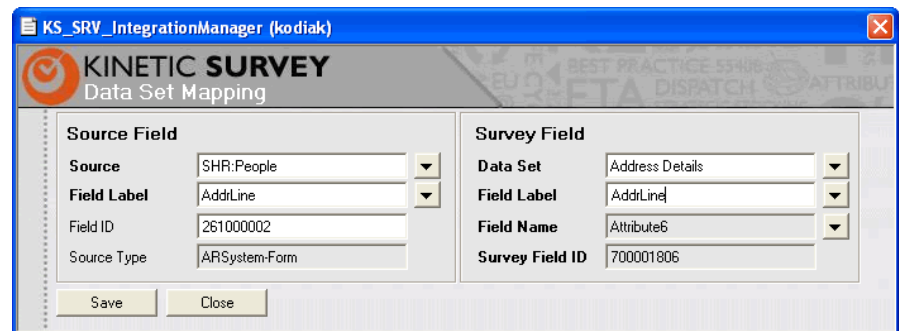


Figure 18 Screen clip: New Integration Point Dialog.

5. Select a **Source** from the menu.
6. Select a **Field Label** from the menu if it is an AR System form. If the source is of another type (AR System-Web Service, Import, List Manager), then type in a Field Label.
7. If the FieldID has not been set, optionally type in a Field ID.
8. From the Survey Field side, select a **Data Set**.
9. From the **Field Label** menu, select the field that the source field will be mapped into. The Field Name and Survey Field ID will automatically be set.
10. Save the mapping by clicking **Save**.
11. Repeat this process for each field that needs to be mapped into the Data Set.

ACTIVE LINK INTEGRATION SET-UP

The Active Link Integration will pop a survey dialog for a user while in another AR System application. This type of integration is typically used for **call scripting** or **surveying** on Help Desk or Customer Service type applications where agents are “working” tickets. If you do not wish to do this type of surveying for your form, you can skip this section.

For example: A user selects a category of “Hardware” and a survey with three Hardware specific questions opens.

You (the AR System Administrator) define at what point in the user processing this qualification is checked. For example on user selection of “Category” or on Save of a record.

For this process, like the Event and Batch Integration, you will:

1. Add shared fields
2. Attach shared workflow
3. Write one or more active links based on templates

Add shared fields

Using the AR Administrator tool, you will add shared fields used for the active link integration. If these fields were added during a batch and event integration, they do not need to be added, and this step can be omitted.

To add shared fields

Using the AR Admin tool:

IMPORTANT NOTE

Make sure the field IDs remain the same when copying fields. This is important to use the shared workflow.

1. Verify that the field ID's used on the shared fields do not overlap with fields on your form.

The following are the shared fields. All are display-only fields except where indicated:

Field	Field ID	Description
_SurveyID	700002004	Used to temporarily store the survey ID to be fired
_SurveyName	700002005	Used to temporarily store the survey name to be fired
_EventName	700002007	Used to temporarily store the Event that is triggering the survey
_TempID	700002003	Used to temporarily store the triggering event ID If there is more than one trigger event, this identifies the next highest triggered Event ID triggered.
_FireQualString	700002006	Used to temporarily store the firing qualification. In an External qualification, this determines whether the record meets the necessary qualification.
_OperationID	700002012	This operation ID is used to track any surveys created out of this specific event.
_IntegrationID	700001560	The instanceID of the Integration created from the Manager Consoles.
_MappingDataSet	700000829	The name of the data set used for the integration.
_CustomerSurveyStatus	700000831	Used for Active Link integration in determining whether to show a survey/call script to the user.
_CustomerSurveyURL	700000833	Used by Active Link integration in building the URL of the

		survey/call script to open.
CustomerSurveyInstanceID	700000830	Used by Active Link integration to hold the instanceID of the survey that was created. This is a true data field.
InstanceID	179	This field is already in use on many forms. If you already have an instanceID (GUID) field, you do not need to add this field. This is a real data field.

2. Copy the above fields from KS_SRV_IntegrationSample onto your form.
3. Save your form before going on to the next step.

Attach shared workflow (active links and filter guide)

To attach shared workflow

Attach a number of filters and a filter guide to your form in order to use the integration process. This workflow is attached already to the KS_SRV_IntegrationSample form.

To help you integrate your own form, it is helpful to view what is happening on these forms. You can view a partial list of workflow.

IMPORTANT NOTE

The workflow attached to your integrated form begins working immediately. While this process is taking place, ensure users are not updating records or some user errors or odd behavior could occur.

1. To view a partial list of workflow
 - a. From the AR Admin tool menu select:
 - View-> By Form**
 - b. Select:
 - KS_SRV_IntegrationSample**

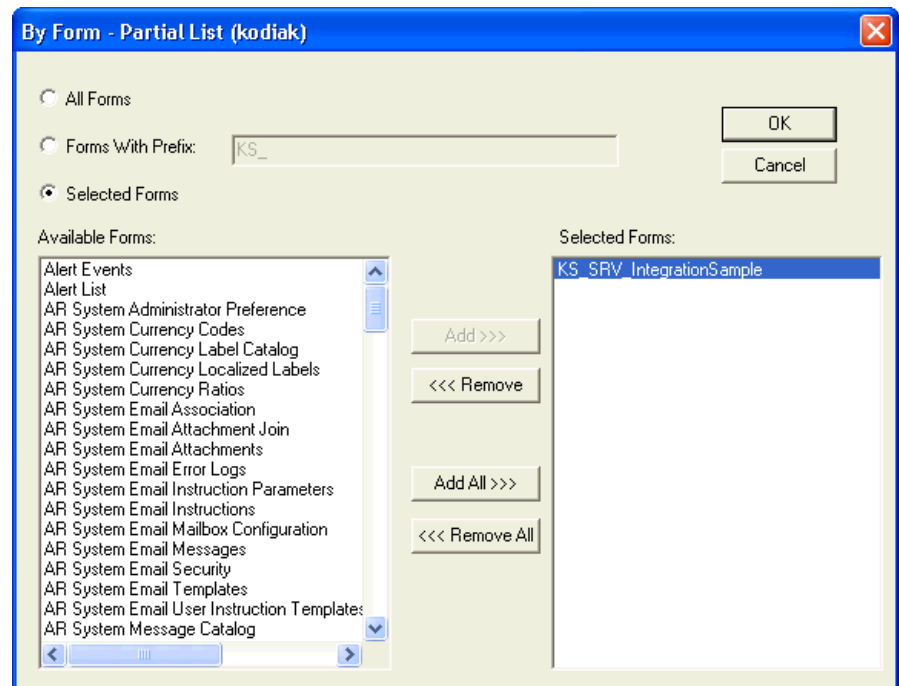


Figure 19 Screen clip: View By Form dialog

2. To close the dialog, click **OK**.
3. Navigate to view the active links for `KS_SRV_IntegrationSample`.
The active links attached to the `KS_SRV_IntegrationSample` form appear.
4. To select the following active links, right-click:
 - **KS_SRV_INTEGRATION_CheckForLoop**
 - **KS_SRV_INTEGRATION_CheckIfSurveyNeedsToFire**
 - **KS_SRV_INTEGRATION_CreateSurveyInstance**
 - **KS_SRV_INTEGRATION_LoadSurvey_01**
 - **KS_SRV_INTEGRATION_LoadSurvey_02**
 - **KS_SRV_INTEGRATION_LoadSurvey_02A**
 - **KS_SRV_INTEGRATION_LoadSurvey_03**
 - **KS_SRV_INTEGRATION_ReadSurveyInstancelId**
 - **KS_SRV_INTEGRATION_SetInstancelId**

A menu appears.
5. Choose **Edit**.

This allows you to edit some properties from multiple active links within a single window.

An active link modification window opens.

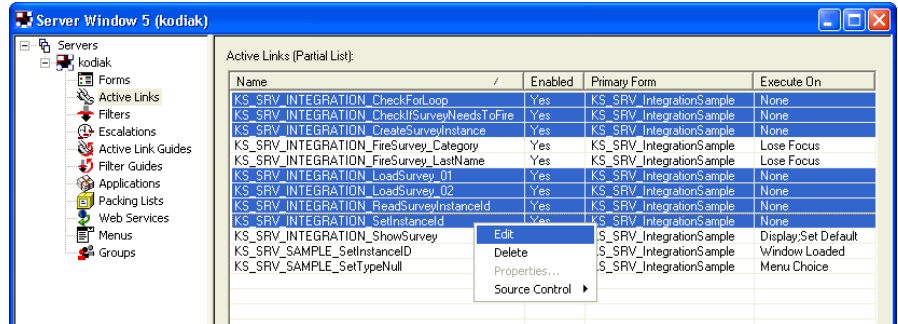


Figure 20 Screen clip: Active Links (Partial List) -- Partial list of active links, selected and ready to attach to your new form

6. On the Active Links (Partial List) dialog, select your form from the list of Forms.
7. Save the active link.

This updates all of the active links highlighted and attaches them to your new form.

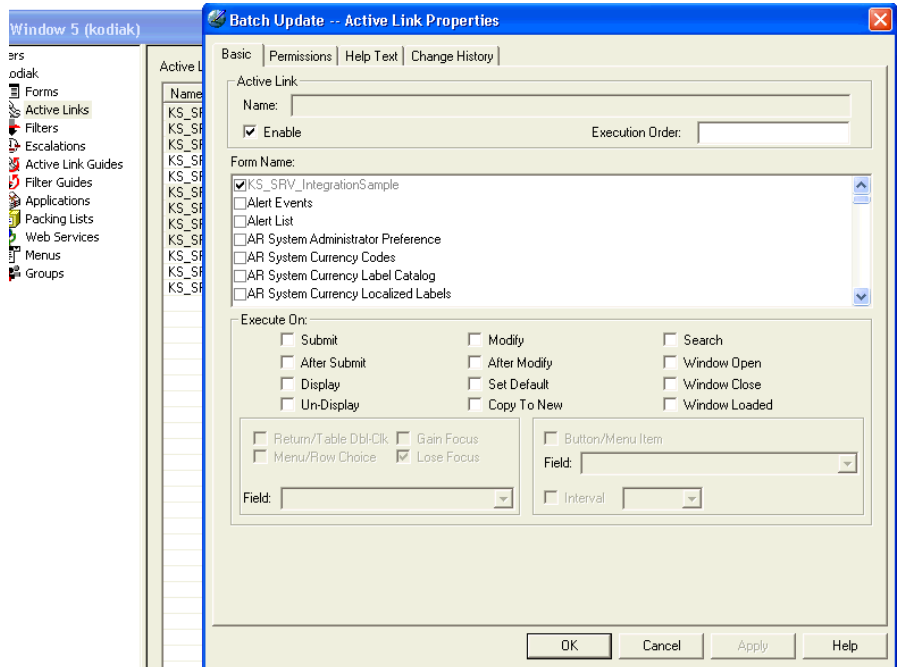


Figure 21 Screen clip: Active Link Batch Update screen

8. To select your form to be integrated from the Active Link Batch Update screen, check the box next to the form.

NOTE

The KS_SRV_IntegrationSample form, and possibly others, is already checked.

Attach active link guide to your form

An active link guide called **KS_SRV_INTEGRATION_CheckForSurvey_Guide** is used to contain all of the shared active links that you attached to your form. This active link guide must also be attached to your form.

To attach the active link guide to your form

1. Using the AR Admin tool, click on the Active Link Guides to see those objects. Because you are already viewing workflow related to the KS_SRV_IntegrationSample form, you should see only one guide: KS_SRV_INTEGRATION_CheckForSurvey_Guide.
2. Open this guide.

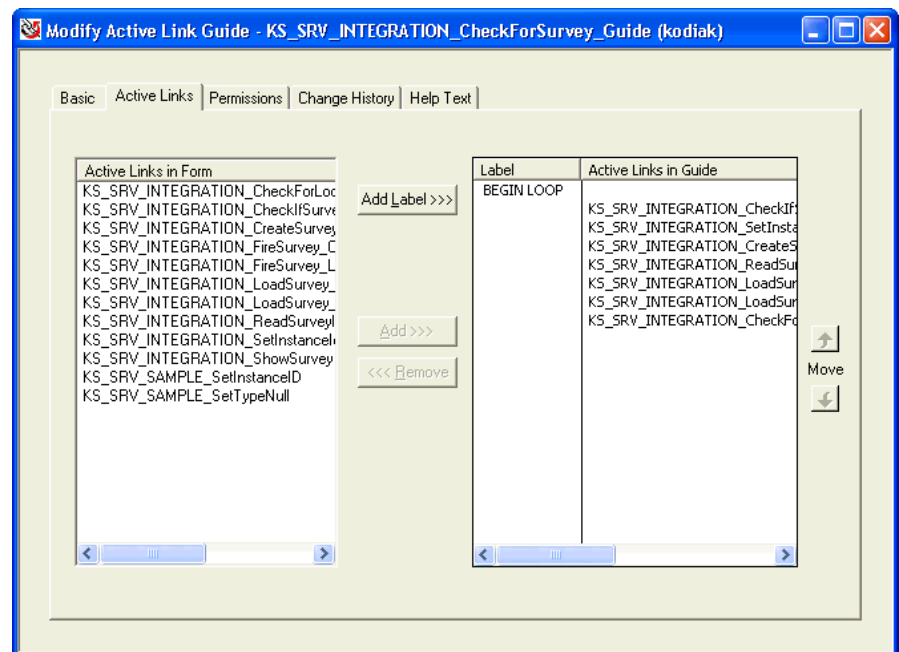


Figure 22 Screen clip: Active Link Guide:
KS_SRV_INTEGRATION_CheckForSurvey_Guide

3. You can see that this guide contains all of the active links you previously attached to your form.
4. On the **Basic** tab, Click on your form name to attach **your form** to this guide.
5. **Save** the Active Link Guide.

Create simple active links based on template

After attaching the shared workflow, you must create one or more active links to trigger the survey dialog. The active link that you create starts the process of opening the survey. The actual qualification checking, setting of Ids and opening of the dialog is done through the shared workflow you have already attached.

It is important to determine at what points you want the survey qualification checked. You can trigger survey checking on any event that you can write an active link for including on menu selection, lose/gain focus, return, table selection, etc. In reality, you probably only want to check for surveys at one or two points within your process. The most common points would be one selection of a categorization, on selection of a product, or on the saving of a record.

To create simple active links based on template

The `KS_SRV_IntegrationSample` form checks the survey at two points: On lose focus of a category with the active link:

`KS_SRV_INTEGRATION_FireSurvey_Category`

and

On lose focus of a last name, with additional criteria in the RUN-IF condition in the active link:

`KS_SRV_INTEGRATION_FireSurvey_LastName`

The RUN-IF Condition should not include data, only event type information such as OPERATION or data required to make a survey relevant such as a name, email address, an Id of some type or other required information for your process.

The actual data qualification to fire a survey is managed via the Integration tab on the Survey Manager. An example of a qualification that may be used is `'Category'="Hardware"`. Managing the data portion of your categorization in the Survey Manager (and the AR User Tool) means that qualification can be changed without code changes, as well as maintaining multiple qualifications to trigger different surveys in different situations.

1. Open on of the above active links to use as a template. In this example we will use **`KS_SRV_INTEGRATION_FireSurvey_LastName`**, that is attached to the Sample Integration form.

IMPORTANT

Remember that every time this event (your active link) transpires, workflow will check to see if a survey is present, that meets the qualification. Over-use of this feature could result in diminished performance.

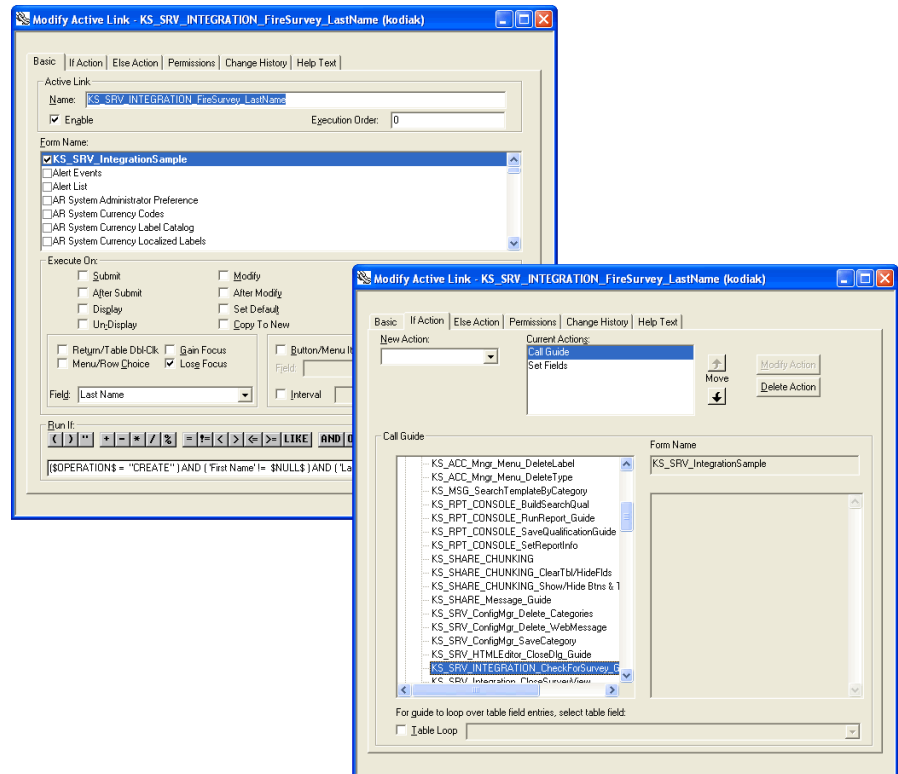


Figure 23 Screen clip: Active Link:
KS_SRV_INTEGRATION_FireSurvey_LastName

- a. Open the active link:
KS_SRV_INTEGRATION_FireSurvey_LastName
- b. Save this active link as your own using the **Save As** command. It is a good idea to name the filter something similar to the existing sample filter for easy identification.
- c. Take a look at the active link.
 - i) The **Run-If** condition will likely change for your situation. If you do not have any special requirements, especially around OPERATION, then this can be left blank and the qualification(s) that will be checked for this event will be solely managed via the Survey Manager console.
 - ii) The **If Action** sets the CustomerSurveyInstanceID and the _CustomerSurveyURL to blank. The CustomerSurveyInstanceID is useful as it is an optional “regular” field that can hold the survey ID used when a specific event happens. You can then structure your qualifications around this field being null or not as to whether to fire a survey again. If you do want the ability to fire multiple surveys from a single form (multiple call scripts for the same record, for instance), then this field should be cleared out, as it is in this example.

- iii) The Call Guide action is the most important action of the active link. The active link guide **KS_SRV_INTEGRATION_CheckForSurvey_Guide** is called whenever you want to check for surveys that match your event. The active link guide uses the shared workflow and shared fields that you added earlier.
- d. Change the form on the active link from `KS_SRV_IntegrationSample` to your own form. You will get a warning about changing forms. This is normal.
- e. Select the event that you want surveys to be checked against. For example, on selection of the 'Category' menu, or on submit. Again, this is the triggering event to check the survey qualifications. Only if the qualifications are met is a survey shown to the user.
- f. Change the RUN-IF qualification and If Action Set fields if necessary for your event.
- g. **Save** your new active link.
- h. Repeat this process and create other active link(s) if there are other events for your form that you want to check for surveys.

Your form is now ready to do call scripting or other surveying. You now need to configure survey triggers and rules.

Pushing Additional Data into Kinetic SR

The basic Active Link integration pushes data from your originating form into Kinetic SR including the form name (`$SCHEMA$`) and the originating ID. The originating ID is, by default, the Instance ID. This is done via the Active Link that you attached to your form earlier called:

KS_SRV_INTEGRATION_CreateSurveyInstance.

If you only want to view this information from a table field from your originating form, you can do this with the information in the default active link. However, if you want to push additional information (such as name, product information, etc.) into the survey itself, you will need to write a custom active link to do this based on the one you attached.

To use your own active link to push data

1. Using the AR Administrator tool, open the active link: `KS_SRV_INTEGRATION_CreateSurveyInstance`. Remove your form from the list of forms by unchecking the form name on the **Basic** tab.
2. **Save** this active link. This has detached your form from the default active link.

3. Using the **Save As** command, save the active link using a naming convention useful to you such as
KS_SRV_INTEGRATION_HPDP:HelpDesk_CreateSurveyInstance.
4. On the **Basic** tab, detach the KS_SRV_IntegrationSample and any other forms except the one you are working with by unchecking the box next to those forms. Re-attach your form to this active link by checking the box next to your form name. Do not change the Run-If condition.

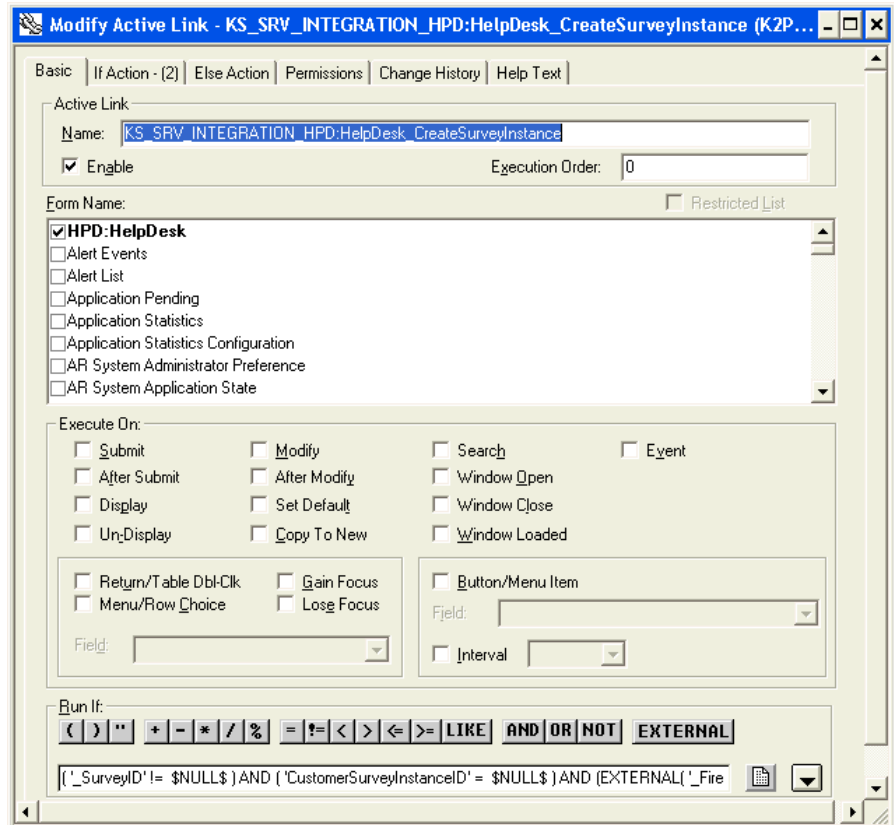


Figure 24: Integration Tab

5. On the **If-Action** tab, select the fields you would like to push from your originating form to Kinetic SR. The attribute fields are useful for storing generic information, as was done in your filter/event based integrations.
6. **Save** your new active link.
7. Using your AR Administrator tool, open the active link guide called: **KS_SRV_INTEGRATION_CheckForSurvey_Guide**.
8. Include your new active link in the active link guide. Do this by **selecting your form** in the left hand window, clicking **Add**, and using the arrows to move your active link directly under the KS_SRV_INTEGRATION_CreateSurveyInstance active link.

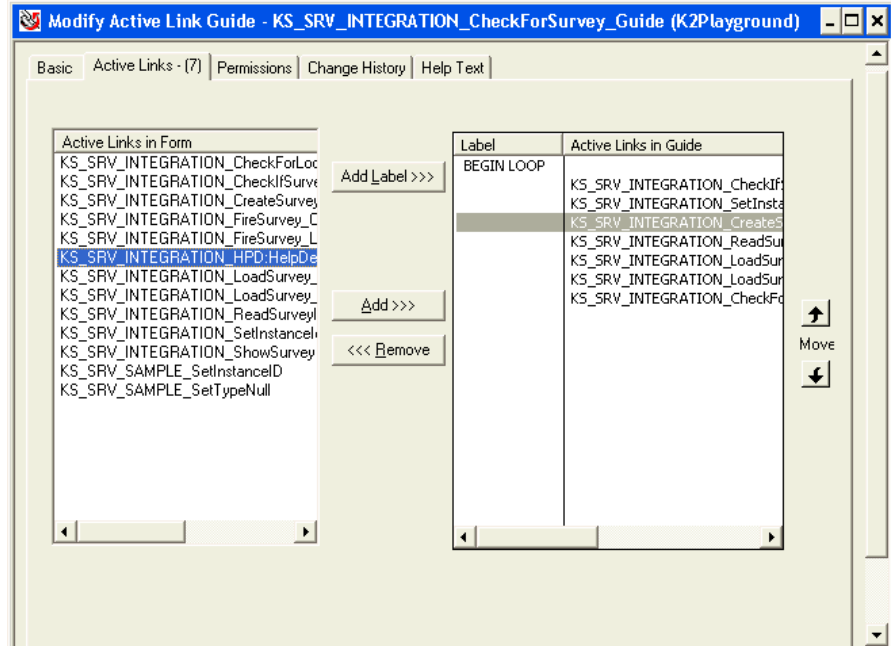


Figure 25: Integration Tab

9. Save the active link guide.

Your form and workflow is now ready to be used.

SAMPLE INTEGRATION TRIGGERS AND RULES

From the Survey Manager console you can configure events and rules to control the integration between your application and Kinetic SR. Kinetic SR includes some sample surveys to better illustrate how they can be used with different integrations.

Viewing the Active Link Integration

You can configure integration between the Survey Integration Sample form and sample surveys in Kinetic SR. Once familiar with the integration process, you can apply this same procedure to your own application.

The first sample uses the active link (client-side) integration to simulate a simple call script scenario.

To view the sample active link integration

1. Open the Manager Consoles.
2. Select the **Category** “Samples” to search for survey templates in this category. These surveys are included when you installed the application.

3. Select the *Simple Call Script* survey.
4. Select the **Integration Tab**. You can see the one integration point already configured for this sample.
From the **Integration** tab, you can incorporate existing applications into your survey by configuring one or more integration points.

In order to view the Integration tab, the survey manager must be a part of the “Survey Integrator” group.

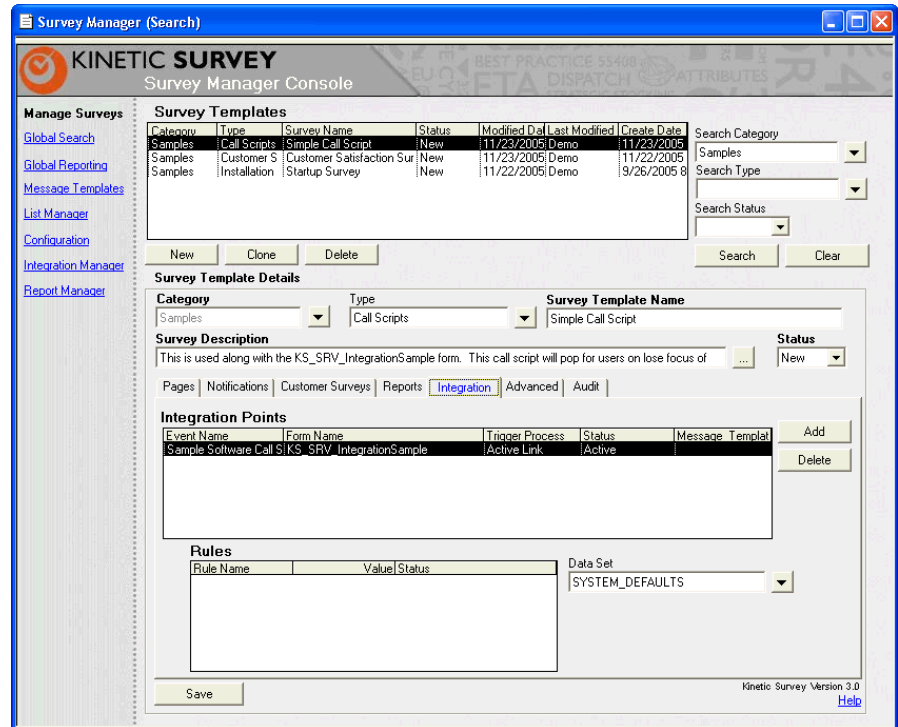


Figure 26: Integration Tab

5. Open the *Sample Software Call Script* integration point from the table by double-clicking on it.
6. The integration point dialog appears. We can see that this survey will fire whenever the Category field equals software. If you remember the active link integration description, this qualification will be evaluated on lose focus of the Category field, and on lose focus of the Last Name field.

KINETIC SURVEY
Integration Manager

Survey Name Simple Call Script
Data Set SYSTEM_DEFAULTS
Integration Status Active
Integration Name Sample Software Call Script Trigger
Form Name KS_SRV_IntegrationSample
Trigger Process Active Link
Message Template
Qualification 'Category'='Software'

Integration Rules

Rule Name	TargetCount	InstanceCount	Status

Figure 27: Integration Tab

7. As you can see, the Message Template field is blank. There are no message templates associated with Active Link integrations, as no invitation is sent to the customer, rather a dialog opens to an agent to fill out.
8. Close the dialog. We will now go see this integration in action.
9. Open the **KS_SRV_IntegrationSample** form in New mode.
10. Enter something in the **Short Description** field.
11. Select "Software" from the **Category** field.
12. Move to the **Type** field. On lose focus of Category, the survey active link integration is checked. The qualification met the criteria ('Category'='Software'), and so the Call Script Survey is triggered in a dialog window.

TIP

Because the originating ID of your ticket and your form name are automatically pushed into Kinetic SR, a table such as this could also be placed on your own form to view answers to surveys related to the ticket. Select an Integration Status:

Figure 28: Call Script Survey on the Integration Sample form

13. Fill out the Call Script Survey and click **Submit**. The survey will be submitted.
14. Click **Close** to close the dialog.
15. Click on the **Results(Active Link Integration)** tab. From here you can see what answers were submitted for the survey.
16. Finish completing the ticket. Include your name and email address.
17. Set the **Status** of the ticket to “Closed”.
18. **Save** the record. This will trigger an event integration and customer satisfaction survey, which will be discussed in the following section.

Viewing the Event Integration Sample

Kinetic SR also includes a sample to illustrate a simple customer satisfaction scenario. This sample is configured to send an email to a customer on the close of their Help Desk ticket. Again we will view the integration point from the Manager Consoles, and then trigger the survey via the Integration Sample (KS_SRV_IntegrationSample) form.

To view the sample event integration

1. Open the **Manager Consoles**.
2. Select the **Category** “Samples” to search for survey templates in this category. These surveys are included when you installed the application.
3. Select the *Customer Satisfaction Survey* survey.

4. Select the **Integration Tab**. You can see the one integration point already configured for this sample.

From the **Integration** tab, you can incorporate existing applications into your survey by configuring one or more integration points.

TIP

In order to view the Integration tab, the survey manager must be a part of the “Survey Integrator” group.

Figure 29: Integration Tab-Customer Satisfaction Survey

5. Open the *Customer Satisfaction on Close* integration point from the table by double-clicking on it.
6. The integration point dialog appears. We can see that this survey will fire whenever the Status field equals “Closed” on the Sample Integration form.

You can also see that in this integration a Message Template has been specified. This means that when this survey is triggered, it will use the specified message template for sending an invite to this survey.

Because of this qualification, the record you created when viewing the sample active link integration, will have also triggered this customer satisfaction survey.

The screenshot shows the 'KS_SRV_IntegrationManager (K2Playground)' window. The 'Integration Manager' section includes the following fields and values:

- Survey Name:** Customer Satisfaction Survey
- Data Set:** SYSTEM_DEFAULTS
- Integration Status:** Active
- Integration Name:** Customer Satisfaction On Close
- Form Name:** KS_SRV_IntegrationSample
- Trigger Process:** Event
- Message Template:** Sample Invite-Targeted
- Qualification:** 'Status'='Closed'

The 'Integration Rules' table is currently empty. The table structure is as follows:

Rule Name	TargetCount	InstanceCount	Status

Figure 30: Integration Tab

7. Close the dialog. We will now go see the results of this integration.
8. Select the **Customer Surveys** tab.
9. On the **Search** field menu, select “Show All”. You should see one entry in the table below the search field (if you created only one record previously) with the name you entered in the Sample Integration form (KS_SRV_IntegrationSample). The status should equal “Sent” meaning an email invitation was sent.

The screenshot shows the 'Customer Surveys' tab in a software application. The interface includes a navigation menu on the left with links for 'List Manager', 'Configuration', 'Integration Manager', and 'Report Manager'. The main area displays the 'Survey Template Details' form, which has fields for 'Category' (Samples), 'Type' (Customer Satisfaction), and 'Survey Template Name' (Customer Satisfaction Survey). Below the form is a search area with a dropdown set to 'Show All' and a search button. A table below the search area displays one record with columns for Survey Sent Date, Last Name, First Name, Status, Validation Status, and Email/Phone. The record shows a survey sent on 11/27/2005 5:34 to Jones, Bill, with a status of 'Sent' and email 'Bill@hiscompar.com'.

Survey Sent Date	Last Name	First Name	Status	Validation Status	Email/Phone
11/27/2005 5:34	Jones	Bill	Sent		Bill@hiscompar.com

Figure 31: Customer Survey tab-Viewing a customer survey

10. If you entered your own email address in the Sample Integration record, and if your AR System email engine is installed and working, you will receive an email shortly with a simple invitation to complete the survey. Complete the survey if desired.

Now that you have seen how the different integration samples are configured, you are free to set up your own integrations from your own forms.

MANAGER CONSOLES-THE INTEGRATION TAB

As you have now integrated one or more forms into Kinetic SR, your users can now manage the qualifications to trigger their surveys from the Survey Manager Console. This information can be found on the Integration tab. The information below is also found in the *Kinetic SR User Guide*.

In order to view this tab, the survey manager must be a part of the “Survey Integrator” group.

IMPORTANT

Before using the Integration tab functions, your AR System Administrator must create the background workflow that allows Kinetic SR to use your originating form’s data. See the *Kinetic SR Integration Manual* for more information.

From the **Integration** tab of the *Survey Manager Console* allow you to establish the following:

INTEGRATION POINTS

- An Integration Point is a combination of a data source (an AR System form), a qualification to indicate when to trigger this survey, and what type of trigger mechanism (event, batch, or active link).
- You can also set up schedules for batch-style integrations.

INTEGRATION RULES

- Apply rules to an integration to further control exactly when a survey is triggered.
- Each rule is specific to an integration point. Therefore, you can create separate integration points and associated rules when triggering one or more surveys.

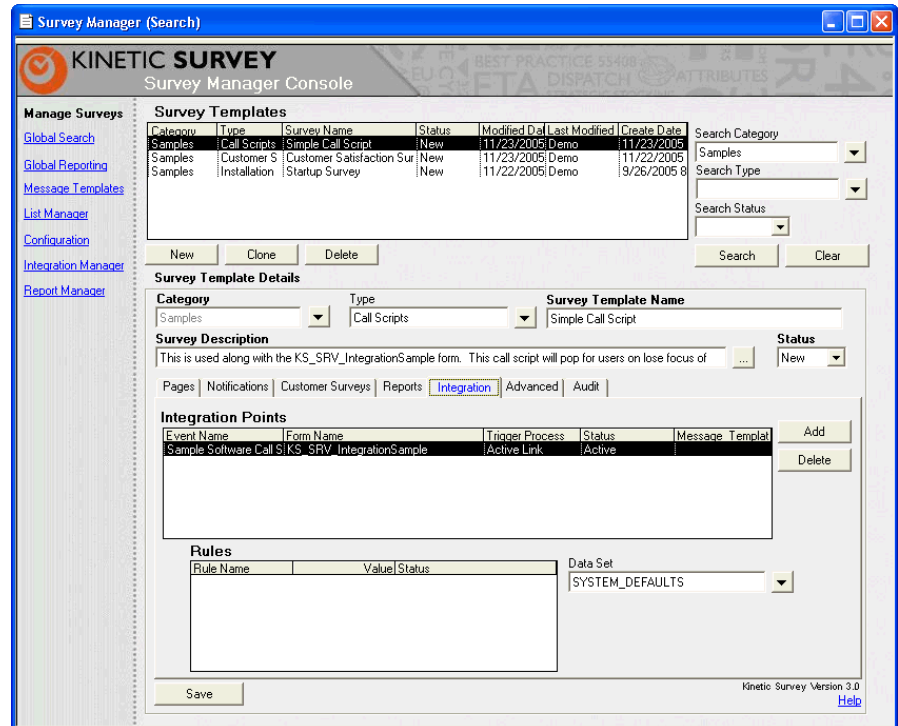


Figure 32: Integration Tab

Managing Integration Points

To delete or create integration points

1. Access the **Survey Manager**. See **Error! Reference source not found.**.
2. Highlight the name of the survey template.
3. Select the **Integration** tab.
4. Two tables are visible. The top table, **Integration Points** contains integration qualifications from forms into the current survey selected. The bottom table, **Rules**, contains rules for creating surveys based on the integration points.
5. To create an **Integration Point**, click **Add**. The New Integration Point dialog opens.

The screenshot shows the 'New Integration Point Dialog' in the Kinetic Survey Integration Manager. The dialog is titled 'KS_SRV_IntegrationManager (kodiak)'. It features a header with the Kinetic Survey logo and the text 'Integration Manager'. The main content area includes several fields and buttons:

- Survey Name:** A dropdown menu showing 'Mary Manager's Second Survey'.
- Data Set:** A dropdown menu showing 'SYSTEM_DEFAULTS'.
- Integration Status:** A dropdown menu showing 'Active'.
- Integration Name:** An empty text input field with a 'Select Existing' button to its right.
- Form Name:** An empty dropdown menu.
- Trigger Process:** An empty dropdown menu.
- Message Template:** An empty dropdown menu.
- Qualification:** An empty text input field with a 'Qualification' button to its right.
- A 'Clear' button is located below the 'Qualification' field.

Below the main fields is a section titled 'Integration Rules' containing a table with the following columns: 'Rule Name', 'TargetCount', 'InstanceCount', and 'Status'. The table is currently empty. To the right of the table are 'Add' and 'Delete' buttons. At the bottom of the dialog are 'Save', 'Close', and 'Help' buttons.

Figure 33: New Integration Point Dialog.

6. Select an Integration Status:
7. **Active**--To immediately begin creating surveys from your integrated form.
8. -Or-
9. **Inactive**: to create the integration point but not immediately begin creating surveys. You can later change the status to active once you want the integration to start populating surveys.
10. Add an identifier for your integration in the **Integration Name** field.
11. -Or-
12. Select an existing integration using the **Select Existing** button. This will open a new dialog listing the current integrations.
13. Select an integration on the table and click **Select**.
14. The integration information will be automatically populated into the appropriate fields.

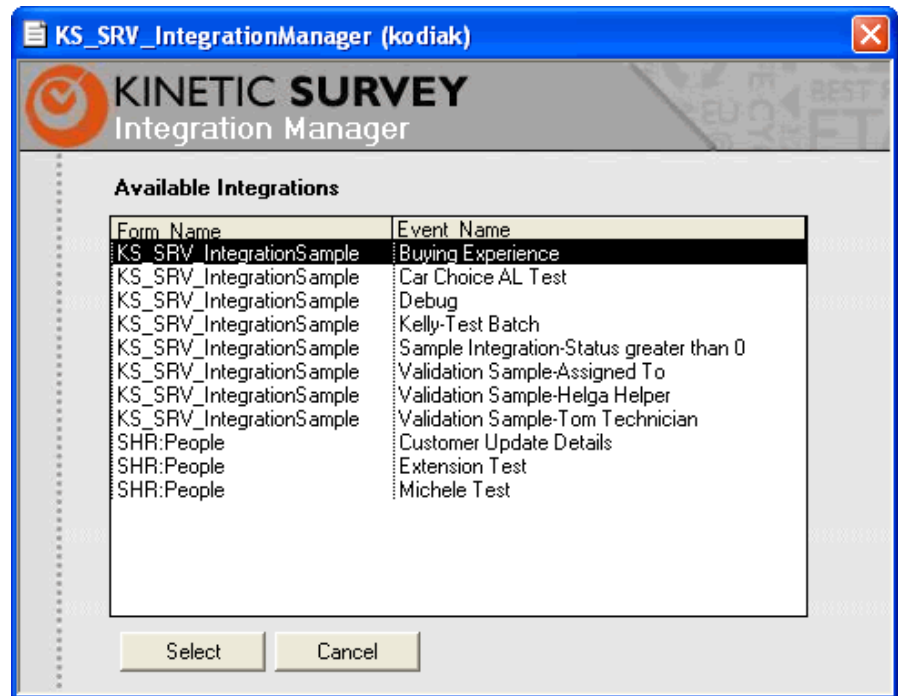


Figure 34: Available Integrations dialog

15. Select the form which will be the data source for this survey by selecting a **Form Name** from the menu. The forms that are listed are those forms integrated into Kinetic SR by your AR System Administrator. See the *Kinetic SR Integration Manual* for more information.
16. Select a trigger process.
17. As described earlier, trigger processes describe how a survey is triggered. There are four options:

Trigger	Description
Active Link	<p>This type of integration will pop a survey dialog for a user while in another AR System application. This type of integration is typically used for call scripting. For example: A user selects a category of "Hardware" and a survey with three Hardware specific questions opens.</p> <p>Note: Your AR System Administrator defines at what point in the user processing this qualification is checked. For example on user selection of "Category" or on Save of a record.</p>
Event	<p>An event trigger is an integration that fires on the creation or modification of a record, typically by a user.</p> <p>For example: To fire when the ticket status equals closed and the record saves</p>

Trigger	Description
Batch-One Time	A batch one-time integration triggers surveys to a group of people at a scheduled date and time. For example: Surveying all Remedy AR Users to see what level of training they have.
Batch-Scheduled	Batch scheduled is an ongoing integration that triggers surveys to a group of people. For example: Surveying all contacts each year on a rolling 12-month basis.

BATCH INTEGRATIONS

18. If your Event Trigger is a batch, schedule when this batch should run.
 - a. If this is a one time batch update:
 - i) Select the date/time schedule field.
 - ii) Select the date and time this should run.
 - b. If this is a recurring batch, click **Schedule**, for the **Schedule Event** dialog displays.

NOTE

Scheduling also allows you to survey after hours, when your server or e-mail engine might not be as busy.

The screenshot shows a window titled "KS_ACC_Schedule (kodiak)" with a close button in the top right corner. The window content is for the "KINETIC SERVICE SUITE" and is titled "Schedule Event". Below the title bar, there is a "Kinetic Survey" section. Under "Occurs", there are radio buttons for "Daily" (selected) and "Weekly". To the right, "Every Day(s)" is set to "1". The "Daily Frequency" section has radio buttons for "Occurs once at:" and "Occurs every:" (selected). The "Occurs every:" section has a frequency of "1" and two dropdown menus. The "Duration" section has a "Start date" of "4/19/2005" and radio buttons for "End Date:" and "No End Date" (selected). There is also a "Currently Scheduled at:" field. At the bottom, there are "Save" and "Close" buttons.

Figure 35: Schedule Event Dialog

19. Enter how often you want the batch to run using the **Occurs**, **Daily Frequency** and **Duration** sections.
20. To save the schedule, click **Save**. The dialog closes.

21. Select the **Message Template** this integration will use when inviting participants to fill out the survey. If no message template is selected, customer survey records will be created but no email messages will be sent out and the Customer Survey status will remain at “New”.
22. You must now write a qualification that describes the trigger event that corresponds to the survey you are working with. Do this by clicking the **Qualification** button.

The integration workflow uses this qualification to determine which surveys to trigger on the particular event.

Event integrations use filters during the save of a record in the source form. Because of this, they can use the special filter qualifications such as ‘TR’ and ‘DB’ values.

Batch integrations also use filters. However, as these are not event based, you should not use ‘TR’ or ‘DB’ values.

Prior to saving a Batch integration a check is done to see how many records would be involved when this batch is triggered. If there is more records than the maximum configured value for Kinetic SR (See **Error! Reference source not found.**) a warning will be given to the user. This warning is done to help avoid large batches of surveys being triggered accidentally.

Active Link integrations use active links during the processing of a ticket, and therefore need to use active link style qualifications. Using a ‘TR’ value in this type of qualification will result in an error when trying to save the integration.

See the following examples:

Example 1—To trigger the survey on the close of a case your qualification might look like this:

```
'TR.Status'="Closed"
```

Example 2—To close the survey and for a specific language, you might write something similar to the following example:

```
'TR.Status'="Closed" AND 'Country' !="Mexico"
```

Add this qualification to your translated Spanish Survey:

Add a similar qualification to your English/Default survey.

Example 3—If you are doing batch contact data validation surveys, you can structure your qualification differently. You might split up and do only a portion of your contacts each month. You could structure your qualification similar to:

IMPORTANT

It is very important to create safe qualifications that do not place undue burden on your server and jeopardize performance. This is especially true for batch surveys.

As an example, if you perform a batch survey against the Help Desk form and the qualification is ‘Status’ = “Closed”, when the batch runs, every closed record would be surveyed, possibly creating tens of thousands or more surveys.

You should use the scheduling capabilities and multiple qualifications to split up surveying large numbers of records.

'Last Name' LIKE "A%" OR 'Last Name' LIKE "B%"

You would schedule this annually, for example each January.

You could then do a February scheduled batch update similar to:

'Last Name' LIKE "C%" OR 'Last Name' LIKE "D%" OR 'Last Name' LIKE "E%"

NOTE

Filters use these qualifications, and therefore should use database names of fields. If there is a possibility that the field name might change, you can also use field IDs in the qualification.

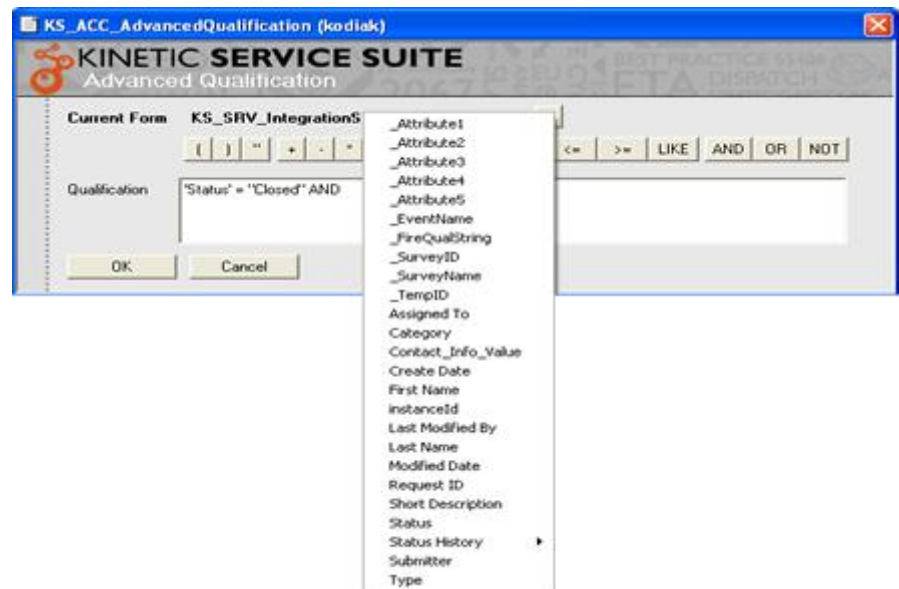


Figure 36: Advanced Qualification Dialog

23. From the **Add Fields** pulldown menu, select the field or fields.
24. In the **Qualification field**, add any modification by clicking the buttons or typing.
25. Click **Add Fields**.
26. To save, click **OK**.
27. –Or–
28. To cancel without saving, click **Cancel**.
29. If you are done, and do not want to add any Integration Rules, Click **Save**. Otherwise continue to the next section, Managing survey integration rules. If you have saved the integration point, your integration appears in the **Integration Points** table.

Managing survey integration rules

You can add additional rules to control the flow of data from your form into Kinetic SR. Rules are specific to an integration, meaning you can have one integration bringing data into your survey with a set of rules specified, and another integration with a different set of rules.

The rule options are available:

Rule	Description
Survey Count	Only surveys every x number of events directed at this survey. Example: To survey every fifth event, add a Rule Value of 5 .
Minimum Survey Frequency	Wait x number of days between surveying an email address. Example: To wait ten (10) days between surveys to a customer, add a Rule Value of 10. This allows you to control the frequency of surveys being sent to customers who call/interact with your company often.
Survey Limit	Specifies a maximum value of surveys that will be generated. Once the maximum number is reached, all remaining surveys will not be processed.

To Add or Delete a Rule

1. Open the integration point you want to apply rules to (See Managing Integration Points).
2. Next to the Integration Rules table, click the **Add** button. The Integration Rules dialog displays.

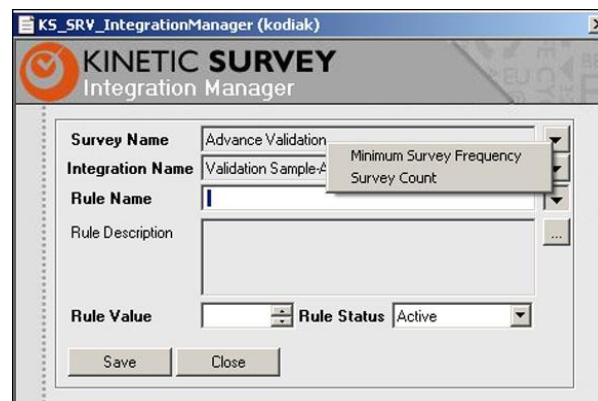


Figure 37: Select a Rule Name Dialog

3. Select a Rule Name from the drop-down list box.

4. Add the **Rule Value** that corresponds to the Rule Name selected:
5. **Survey Count** — Every <Rule Value> survey sent that meets your qualification(s).
6. **Minimum Survey Frequency** — Wait <Rule Value> number of days between surveys sent to any one e-mail address.
7. **Survey Limit**— Specifies a maximum value of surveys that will be generated. Once the maximum number is reached, all remaining surveys will not be processed.
8. Select the **Rule Status**:
9. **Active** — This status immediately applies this rule to this survey.
10. **Inactive** — Creates the rule, but does not immediately apply the rule to any integrations in place. To apply the rules, change the status to **Active**.
11. To close without saving, click **Close**.
12. To add the rule to your survey, click **Save**. This rule now appears in the **Rules** table on the **Survey Manager**.

To Delete a Rule

1. Open the integration you want to apply rules to (See Managing Integration Points).
2. Next to the Integration Rules table, click the **Delete** button. The Integration Rule will be deleted.

Data Sets

A **Data Set** is a pre-configured set of labels that are used to better identify the data that is pushed into Kinetic SR.

Kinetic SR includes a set of 64 generic “attribute” fields. These fields are used to store data that you may want to use to personalize emails (such as first/last name), include in the header of your survey (such as issue description, date of interaction) or for reporting (such as assigned agent, direct report, employee ID).

Your AR System administrator decides what information to push into Kinetic SR when integrating a form or data from another application and therefore the definition of the data set. By using data sets, similar surveys can have a similar “backbone” of information that can be reported on in a similar fashion.

Many of the menus you see when creating a survey use the data set labels. Particularly those used to create qualifications when setting defaults or dynamic lists, when creating message templates and for reporting.

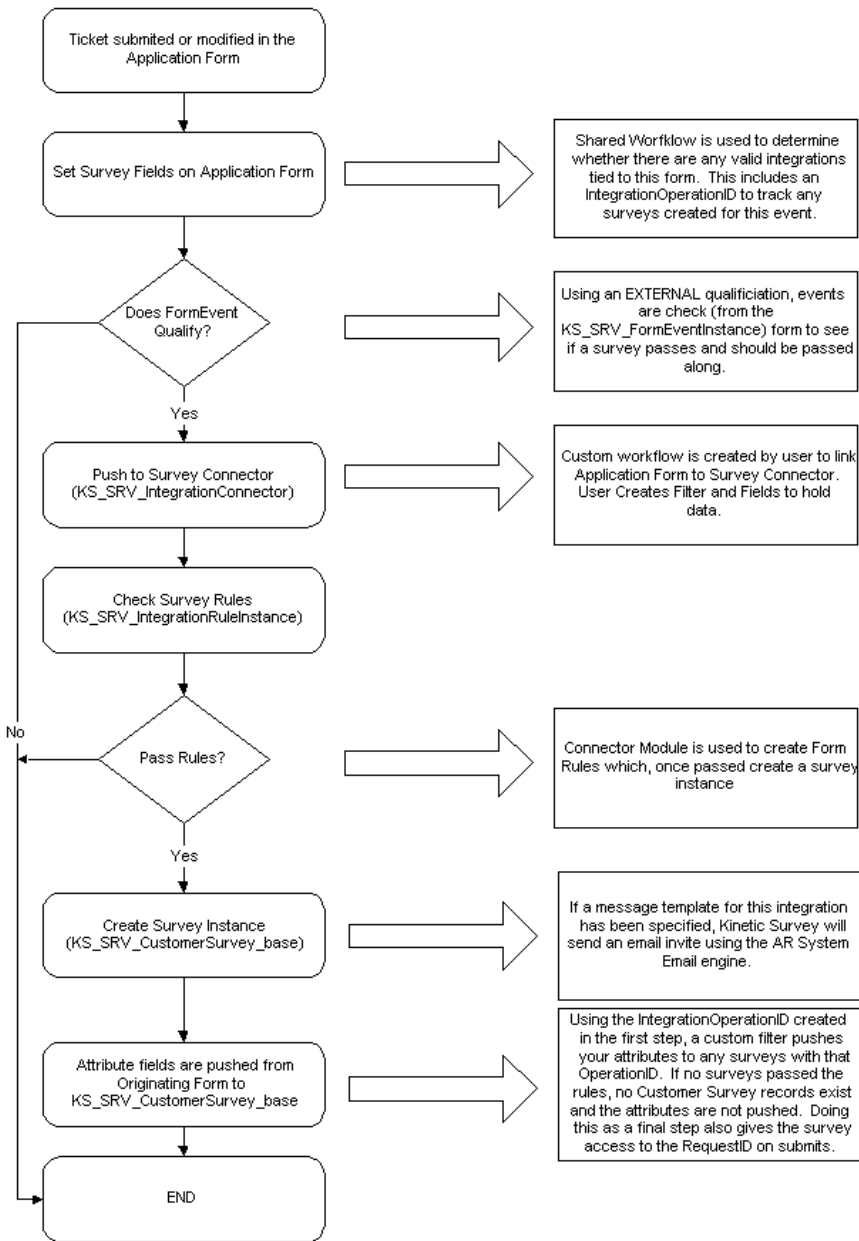
By default, each survey uses the “SYSTEM_DEFAULTS” data set.

To choose a data set

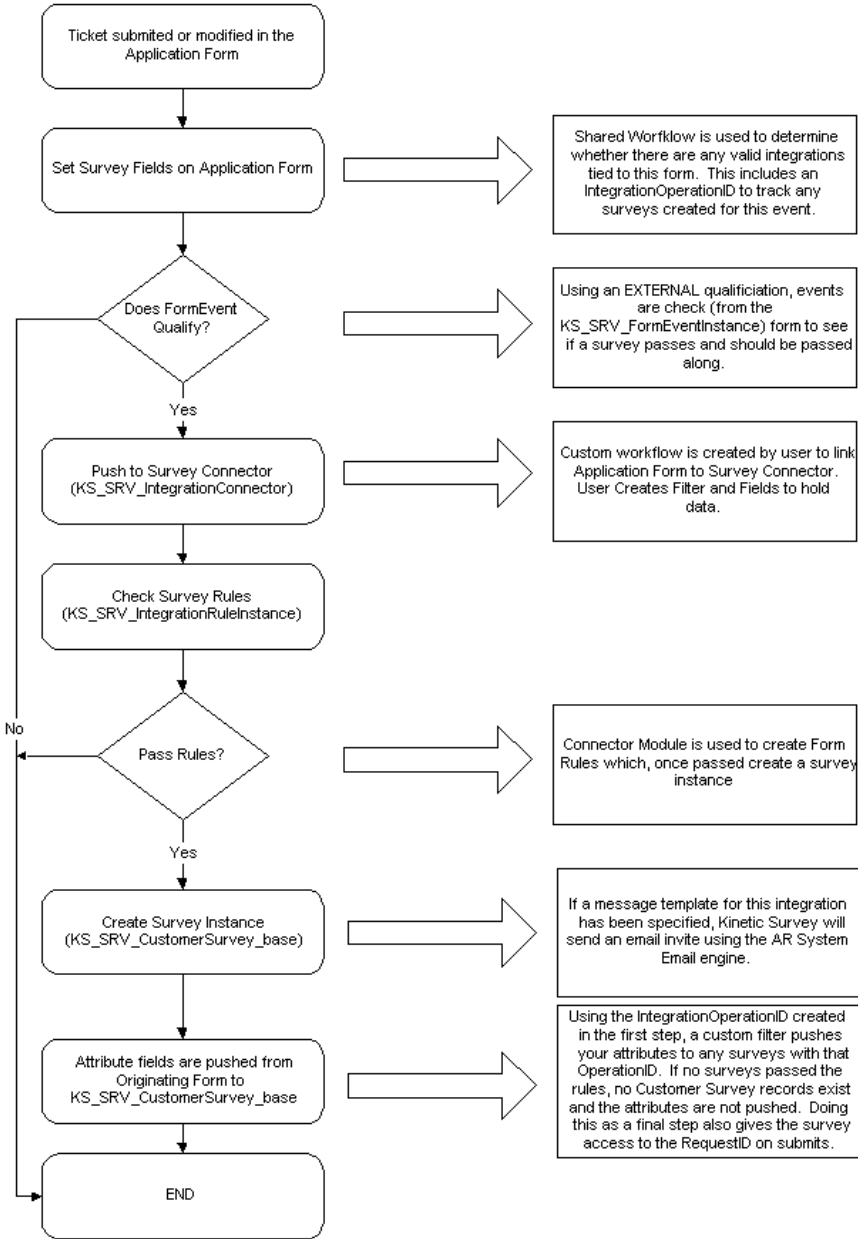
1. Access the Survey Manager.
2. Highlight the name of the survey template you want to work with..
3. Select the **Integration** tab.
4. Select an item from the menu in the **Data Set** field.

REFERENCES

SURVEY INTEGRATIONS PROCESS DIAGRAM—EVENT TRIGGER



SURVEY INTEGRATIONS PROCESS DIAGRAM—BATCH TRIGGER



SURVEY INTEGRATIONS PROCESS DIAGRAM—ACTIVE LINK TRIGGER

