Voice of the Customer Administration Manual

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IBM Tealeaf cxConnect Voice of Customer Administration Manual

Use this manual to review the experiences of users who provide feedback on your website. You can turn this information, along with customer surveys, into useful and functional information.

cxConnect for Voice of Customer overview

IBM® Tealeaf® cxConnect for Voice of Customer (VOC) enables simple integration of Tealeaf session data with VOC applications. Voice of Customer technologies provides mechanisms for online visitors to submit feedback through the web application and for the business to analyze and aggregate these perspectives into functional information.

When web analysts review customer surveys or feedback results, IBM Tealeaf cxConnect for Voice of Customer can be used to review the actual experience of the visitor who provided the feedback. In this manner, the business can corroborate the provided feedback and identify the root source of customer experience issues.

For example, if many customers complain about the registration process, Tealeaf enables web analysts to drill into feedback summary reports provided by the VOC application. The VOC application can be used to replay the specific session in which an individual customer attempted to register. In this manner, the analyst can provide better customer support and identify potential application issues with the registration process.

A hyperlink is inserted into the VOC feedback reports that analysts can use to replay the specific visitor session.

When a visitor sends feedback to your site, the session identifier is created for the visitor's session. The session identifier is delivered to the VOC provider, which is then sent back to your hosting web server. Tealeaf can capture this information with IBM Tealeaf cxConnect for Data Analysis, which enables further analysis by your entire Tealeaf solution.

Integration with Tealeaf

This document describes the methods for integrating third-party applications with the IBM Tealeaf CX platform using IBM Tealeaf cxConnect for Data Analysis.

The available methods for integration are as follows:

Table 1. Integrating with Tealeaf through cxConnect

Method	IBM Tealeaf cxConnect for Data Analysis Product	Description
Replay Link	Voice of Customer	Allows replay of a single session.
Data Insertion	Voice of Customer	Allows external data (events) to be inserted into a session through a customizable image request. See “cxConnect integration through data insertion” on page 2.
Segment File	Web Analytics	Allows creation of a Tealeaf session segment from a list of supplied session identifiers. See "cxConnect Integration through Segment Files" in the *IBM Tealeaf cxConnect for Web Analytics Administration Manual*.

cxConnect integration through data insertion

The data insertion method of integration is used to associate website content and customer experience data, delivered by third-party and/or internal systems, with Tealeaf captured sessions, where the information to integrate is not included in the HTTP stream that is captured by Tealeaf.

The data association is accomplished by making a request, which includes the data to be associated as query string parameters, for an image file located on the web infrastructure that is automatically captured by Tealeaf.

Note: The only modification to the requested web infrastructure is the inclusion of the image file. The image file must be named `tl_img.html`.

For performance and data optimization reasons, by default the Tealeaf system filters all requests for common binary formats, such as `.gif`, and drops them from the captured data stream. To bypass this filter, the `.html` extension is used for the image file, ensuring that the request and all included data pass through the Tealeaf system.

The URL for the image request is as follows:

```
http://<HostPathToImage>/tl_img.html?Source=<Source>&Event=<Event>&SidName=
  <SidName>&SidValue=<SidValue>&Custom1=<Custom1>&Custom2=<Custom2>
```

Note: Any number of custom name/value pairs can be included in the query string parameters of the request. In all cases, values without spaces are preferred.

Table 2. cxConnect Integration through Data Insertion

Parameter	Required?	Type	Description
`HostPathToImage`	Y	[string]	Path to the `tl_img.html` file on the target web infrastructure.
`Source`	N	[string]	Used to identify the third-party or internal system that is generating the request.
`Event`	N	[string]	Used to identify the type of event of the request. (i.e. `start`, `complete`, etc.)
`SidName`	N	[string]	Used to identify the name of the cookie that is used for sessionization in the Tealeaf system. **Note:** If session cookie name/value pairs are not automatically associated with the request. If they are overwritten, then the `SidName` parameter is required to associate the request with its originating session. Otherwise, the image request will become a one-hit session in Tealeaf and might be dropped.

Table 2. cxConnect Integration through Data Insertion (continued)			
Parameter	**Required?**	**Type**	**Description**
`SidValue`	N	[string]	Used to identify the value of the cookie that is used for sessionization in the Tealeaf system. **Note:** If session cookie name/value pairs are not automatically associated with the request or if they are overwritten, then the `SidValue` parameter is required to associate the request with its originating session. Otherwise, the image request becomes a one-hit session in Tealeaf and might be dropped.

Examples

Examples of cxConnect integration through data insertion.

About this task

For all examples, the following value is used for the host path:

- **`Host_Path_To_Image`** - `example.tealeaf.com/images`

These JavaScript functions are used for the following:

Procedure

1. Get the cookie value used for sessionization where needed
2. Dynamically create the image request

Results

```
<script type="text/javascript">
<!--
// Begin example Tealeaf integration

// Function retrieves the specified cookie value used for sessionization.
function TLGetCookie(c_name)
{
if (document.cookie.length>0)
{
c_start=document.cookie.indexOf(c_name + "=");
if (c_start!=-1)
{
c_start=c_start + c_name.length+1;
c_end=document.cookie.indexOf(";",c_start);
if (c_end==-1) c_end=document.cookie.length;
return unescape(document.cookie.substring(c_start,c_end));
}
}
return "";
}

// Function dynamically creates image request.
function TLSendRemoteEvent(hostPath, source, event, sidName, sidValue, params)
{
var src = 'http://' + hostPath + '/tl_img.html?';
src += ((source.length >0) ? ('&Source=' + source) : '');
src += ((event.length >0) ? ('&Event=' + event) : '');
src += ((sidname.length > 0) ? ('&sidname=' + sidname) : '');
src += ((sidvalue.length > 0) ? ('&sidvalue=' + sidvalue) : '');
```

```
src += ((params.length > 0) ? ('&'+ params) : '');

document.write('<img  border="0" name="tl_img" width="1" height="1"
  src="'+src+'">');
}
// End example Tealeaf integration
-->
</script>
```

Example 1
Create two separate requests to signify the 1) initiation and 2) completion of a survey delivered by a third-party Voice-Of-Customer (VOC) provider. In both cases, the session cookie information is automatically associated with the request.

Request 1

```
<script type="text/javascript">
TLSendRemoteEvent('example.tealeaf.com/images', 'VOC_Provider',
  'SurveyInitiated', '', '', 'SurveyId=Survey01');
</script>
```

Request 2

```
<script type="text/javascript">
TLSendRemoteEvent('example.tealeaf.com/images', 'VOC_Provider',
   'SurveyCompleted', '', '', 'SurveyId=Survey01');
</script>
```

Example 2
Create a request to associate test content delivered by a third-party Multivariate Testing (MVT) provider. In this case, the session cookie information is automatically associated with the request.

```
<script language="JavaScript" type="text/javascript">
TLSendRemoteEvent('example.tealeaf.com/images', 'MVT_Provider',
  'CreativeDisplayed', '', '',
  'LocationId=TestLocation01&CampaignId=123&CreativeId=4567');
</script>
```

Example 3
Create a request to associate application content delivered by an internal account statement imaging system. In this case, the session cookie information (`JSessionId=6ADC032CE62410E601D18F0E83F2F02A`) needs to be supplied, as it is not automatically associated with the request.

```
<script language="JavaScript" type="text/javascript">
var TLSessionizationName='JSessionId';
var TLSessionizationValue=TLGetCookie(TLSessionizationName);

TLSendRemoteEvent('example.tealeaf.com/images', 'Statement_Imaging',
   'StatementDelivered', TLSessionizationName,
   TLSessionizationValue, 'AccountDate=2008-03-03&
   SourceDB=MF987&ImageId=ABC123DEF456');
</script>
```

Configuring Tealeaf

`Privacy.cfg` must be configured and Tealeaf events must be created to use the website content and customer experience data that is associated with sessions through the data insertion integration method.

Privacy.cfg

To complete the configuration of the data insertion integration method, the following rules and actions must be included and enabled in the `Privacy.cfg` file on the Tealeaf processing server:

```
[Rule6]
Enabled=True
Tests=TLIMG_UrlTest
Actions=TLIMG_SetResponseType, TLIMG_SetResponseContentType,
   TLIMG_SetCaptureType, IntegrationReplaceJS,

[Rule7]
Enabled=True
TestOp=AND
Tests=TLIMG_UrlTest, TLIMG_SidValueTest
Actions=TLIMG_SetTLTSID

#-------------------------------------------------------------------------------
# Data insertion integration via tl_img.html request
#
# Actions are required for accurate replay
#
# TLIMG_UrlTest         - constrains the actions to the tl_img.html URL
# TLIMG_SetResponseType - changes to the proper type
# TLIMG_SetCaptureType  - changes to the proper capture type
# TLIMG_SidValueTest         - test for the existence of the SidValue
#                              parameter
# TLIMG_SetTLTSID       - forces the hit to be associated with changes to the
#                        proper capture type
#
[TLIMG_UrlTest]
ReqField=URL
ReqOp=EQ
ReqVal=/tl_img.html

[TLIMG_SetResponseType]
Action=ReqSet
ReqSetSection=env
ReqSetField=ResponseType
ReplaceString=image/gif

[TLIMG_SetCaptureType]
Action=ReqSet
ReqSetSection=iamie
ReqSetField=CaptureType
ReplaceString=3

[TLIMG_SetResponseContentType]
Action=ReqSet
ReqSetSection=ResponseHeaders
ReqSetField=Content-Type
ReplaceString=image/gif

[TLIMG_SidValueTest]
ReqField=SIDVALUE
ReqOp=EQ
ReqVal=
NOT=True

[TLIMG_SetTLTSID]
Action=ReqSet
Section=urlfield
Field=SidValue
ReqSetSection=iamie
ReqSetField=TLTSID
MD5=False
```

Events
In addition to performing the above configuration, Tealeaf events must be created in the Tealeaf Event Manager to leverage the website content and customer experience data that has been associated with sessions via the data insertion integration method.

A library of events based on pre-built partner integrations is available for import. See "TEM Events Tab" in the *IBM Tealeaf Event Manager Manual*.

cxConnect Integration through replay links

A replay link can be created in any application supporting the HTML anchor (<a>) tag. The replay link will replay a Tealeaf session through a web service call on the Tealeaf Portal Server.

- Replay may require the standalone Tealeaf IBM Tealeaf CX RealiTea Viewer, if `LinkType` value RTV is chosen. See below.

Structure of Query URL

The following explains the structure of Query URL.

The URL for the web service call is as follows:

```
http://<host>/<WebServiceName>/cxConnect.asmx/GetSessionReplayLink?
   SessionType=<location>
   &LinkType=<linktype>&Field=<field>&Value=<value>&MD5=<md5>&
   SessionDate=<sessiondate>&
   SessionPreference=<sessionpreference>&Redirect=<redirect>
```

Note: All parameter values should be URL encoded.

- The `GetSessionReplayLink` function supports the use of NT/AD and Single Sign On authentication methods. See "Authentication" in the *IBM Tealeaf cxImpact Administration Manual*.

Table 3. Structure of Query URL

Parameter	Required?	Type	Description
`Host`	Y	[string]	Hostname of the Tealeaf Portal Server. The host value might also be an alias for the DNS resolved Tealeaf Portal Server. **Note:** Users attempting to replay sessions through a Replay Link must be using computers that are able to resolve through DNS the supplied host value.
`WebServiceName`	Y	[string]	Virtual directory for the web service. By default, the installed virtual directory is `PortalAPI`.
`SessionType`	Y	[string]	Determines the session type scope of the web service search request. Sessions transition from active to complete based on a defined timeout value or through an explicit session close action: `ACTIVE` - Active sessions `CLOSED` - Completed sessions `ALL` - All session

Table 3. Structure of Query URL (continued)			
Parameter	**Required?**	**Type**	**Description**
`LinkType`	Y	[string]	Controls how the session is replayed by the user. RTV represent the Tealeaf IBM Tealeaf CX RealiTea Viewer, a Microsoft Windows-based client application. BBR represents Browser-Based Replay, a web-based replay mechanism delivered through the Tealeaf Portal: RTV - IBM Tealeaf CX RealiTea Viewer BBR - Browser-Based Replay
`Field`	Y	[string]	Data field parameter of the web service search request. **Note:** The number of sessions that are retrieved by the web service search request are influenced by the uniqueness of the field/value combination. In most cases, `TLTSID` should be used. • `TLTSID` • `TLTUID` • `CustomVar0` through `CustomVar63` • For compatibility with pre-Release 8.0 integrations, Tealeaf supports the use of `LoginID`, `UserDef1` - `UserDef4`, and some session attributes. See "Field Compatibility Mapping" on page 9.
`Value`	Y	[string]	Corresponding value of the web service search request data field parameter.
`MD5`	N	[string]	Determines whether to perform an MD5 hash on the provided value before running the search request. TRUE FALSE

Table 3. Structure of Query URL (continued)			
Parameter	**Required?**	**Type**	**Description**
`SessionDate`	Y	[string]	The GMT date parameter of the web service search request. The performance and number of sessions returned by the web service search request will be influenced by the date scope of the request. An empty value causes the web service search request to search all available data. • **Format:** `YYYY-MM-DD` or `YYYY-MM-DD HH:MM:SS` (URL Encode the space to _) **Note:** The known SessionDate and time when the Tealeaf session closes might differ. For example, a popup form might be submitted 30 minutes after the user's last activity of the site. As a result, SessionDate is dynamically adjusted to include the most likely date ranges for the session. For sessions that occur within +/- two hours of 'end of day' (00:00:00), the range is extended to include the previous (<= 02:00:00) or next (>= 22:00:00) day in the search.
`SessionPreference`	Y	[string]	Determines which session to replay when multiple sessions are retrieved by the web service search request. **Note:** In most cases the Any option (3) should be used as it causes the web service search request to complete after the first session is retrieved. The Earliest (1) and Latest (2) options require that the web service search request perform a sort operation after all sessions are retrieved. `EARLIEST` - Returns the earliest session retrieved by the search, sorted by date-time `LATEST` - Returns the most current session retrieved by the search, sorted by date-time `ANY` - Returns the first session retrieved by the search

Table 3. Structure of Query URL (continued)			
Parameter	**Required?**	**Type**	**Description**
`Redirect`	Y	[string]	Determines whether or not the resulting replay action, based on the LinkType parameter, will be invoked. **Note:** In most cases, the redirect value should be TRUE as it automates the replay action. In situations where additional application logic is required, setting the redirect value to FALSE causes the web service search request to return an XML node that includes the LinkType URL. TRUE FALSE

Note: A series of web service test interfaces are provided by navigating a browser to the web service URL: `http://<host>/<WebServiceName>/cxConnect.asmx`. The `GetSessionReplayLink` link will exercise the aforementioned search request method.

Field Compatibility Mapping

To maintain compatibility with pre-Release 8.0 integrations, Tealeaf maintains support for the following `Field` values. The values in the left column correspond to user-defined variables in pre-Release 8.0 systems. When URL queries are submitted, the Tealeaf server automatically maps the fields and their values to the Release 8.0 or later values in the right-hand column.

- In all cases, the value for `Field` must match the values that are listed below.

  Note: In a future release, support for pre-Release 8.0 integrations, including these query parameters, might be deprecated. Tealeaf recommends adopting the new standards below.

Pre-Release 8.0
User Variables
  Release 8.0 or later
  Session Attributes

`LoginID`
  `CustomVar0`

`UserDef1`
  `CustomVar1`

`UserDef2`
  `CustomVar2`

`UserDef3`
  `CustomVar3`

`UserDef4`
  `CustomVar4`

`SessionAttribute0`
  `CustomVar5`

`SessionAttribute1`
  `CustomVar6`

...
...

SessionAttribute57
CustomVar62

SessionAttribute58
CustomVar63

Note: SessionAttribute59 through SessionAttribute63 are not supported in Release 8.0 or later.

Examples_a

For all examples, use the Host and WebServiceName.

- **Host:** tealeafReplay
- **WebServiceName:** PortalAPI

Example 1 - Completed Sessions, RTV, TLTSID, Specific Date

Create a link to replay the first completed session retrieved, which occurred on March 3, 2008, with a TLTSID value of 6ADC032CE62410E601D18F0E83F2F02A. When clicked, the link will automatically open the IBM Tealeaf CX RealiTea Viewer (RTV) on the client's computer to replay the session.

```
http://tealeafReplay/PortalAPI/cxConnect.asmx/GetSessionReplayLink?
   SessionType=CLOSED
   &LinkType=RTV&Field=TLTSID&Value=6ADC032CE62410E601D18F0E83F2F02A
   &SessionDate=2008-03-03&SessionPreference=ANY&Redirect=TRUE
```

Example 2 - All Sessions, RTV, TLTSID, Any Date

Create a link to replay the first session retrieved, which occurred on any date in the past, with a TLTSID value of 6ADC032CE62410E601D18F0E83F2F02A. When clicked, the link will automatically open the IBM Tealeaf CX RealiTea Viewer (RTV) on the client's computer to replay the session.

```
http://tealeafReplay/PortalAPI/cxConnect.asmx/GetSessionReplayLink?
   SessionType=ALL
   &LinkType=RTV&Field=TLTSID&Value=6ADC032CE62410E601D18F0E83F2F02A
   &SessionDate=&SessionPreference=ANY&Redirect=TRUE
```

Example 3 - All Sessions, BBR, UserDef1, Any Date

Create a link to replay the first session retrieved, which occurred on any date in the past, with a CustomVar3 value of ProductID1234. When clicked, the link will automatically open the Tealeaf Portal and browser-based replay (BBR) to replay the session.

```
http://tealeafReplay/PortalAPI/cxConnect.asmx/GetSessionReplayLink?
   SessionType=ALL&LinkType=BBR&Field=CustomVar3&Value=ProductID1234
   &SessionDate=&SessionPreference=ANY&Redirect=TRUE
```

Example 4 - Completed Sessions, RTV, CustomQuery, Any Date

Create a link to replay the first completed session retrieved, which occurred on March 3, 2008, with a TLTSID value that matches the MD5 hash of 6ADC032CE62410E601D18F0E83F2F02A. When clicked, the link will automatically open the IBM Tealeaf CX RealiTea Viewer (RTV) on the client's computer to replay the session.

```
http://tealeafReplay/PortalAPI/cxConnect.asmx/GetSessionReplayLink?
   SessionType=CLOSED
   &LinkType=RTV&Field=TLTSID&Value=6ADC032CE62410E601D18F0E83F2F02A&MD5=TRUE
   &SessionDate=2008-03-03&SessionPreference=ANY&Redirect=TRUE
```

OpinionLab Integration Solution

This section details how to integrate Tealeaf with customer feedback that is submitted through OpinionLab.

OpinionLab Feedback overview

When the OpinionLab Feedback **[+]** icon is displayed, visitors can click the icon to submit valuable feedback about the website.

After a visitor clicks the icon, a customized Comment Card is displayed. The user can enter a page rating, submit text comments, and answer any questions that are presented in the comment card. The OpinionLab product can be configured to send automated email alerts and dynamic reports that allow designated stakeholders to monitor the feedback statistics and other related details in real time.

OpinionLab and Tealeaf Integration

When OpinionLab and Tealeaf technologies are integrated, the power of Customer Voice and Customer Experience are brought together to enhance insight into the overall customer experience.

When OpinionLab and Tealeaf are fully integrated with each other, they provide:

- Tealeaf Replay link integration into OpinionLab feedback.

  OpinionLab automated alerts are sent to website administrators when a customer submits an opinion of the site online. In the automated OpinionLab alerts, a Tealeaf Session Replay link is added next to every user comment. When you review the customer comments, you can immediately view the customer's captured session in Tealeaf and replay the session. You can replay the session to see the customer experience that prompted the submitted comments. For information on how to integrate Tealeaf Replay links into OpionionLab feedback, see “Integrating Tealeaf Visitor Sessions into OpinionLab Feedback” on page 13.

  Note: The Tealeaf Session ID (`TLTSID`) is also visible in exported OpinionLab reports.

  For more information on how to configure OpinionLab to display session replay links in the customer comment reviews, see “Integrating Tealeaf Visitor Sessions into OpinionLab Feedback” on page 13.

- OpinionLab feedback insertion into Tealeaf visitor sessions.

  You can contact OpinionLab to have them configure the customer feedback so that the feedback is inserted into the customer session that is recorded by Tealeaf. The customer feedback is inserted into the captured session and is listed as a unique page in the session page list. When you view the customer comment page in the replay session, the customer feedback is displayed as a table. The first column of the table displays the field name that contains the customer response. The second column of the table displays the value that is stored in the field when the customer entered their response.

  The following table shows an example of how the customer feedback page might look in a Tealeaf Replay session. The feedback shows various ratings for the website and that the customer left a comment that they could not check out and complete the ordering process due to a technical issue. The web page where the feedback was initiated is also displayed.

Field	Value
VOCName	VOC Company
OverallRating	2
ContentRating	2
DesignRating	3
UsabilityRating	1
Comment	I could not checkout!
CommentReason	Technical Issues
Page	http://www.straussandplesser.com/store
SiteVisitReason	Make a purchase.

For more information on how to integrate OpinionLab Feedback into Tealeaf visitor sessions, see "Inserting OpinionLab Feedback into Tealeaf Visitor Sessions" on page 16.

Setting up OpinionLab Feedback icon

After the Comment Card is configured correctly on the OpinionLab dashboard, the relevant Javascript, associated files, and the feedback icon must be included in the test page.

A typical include statement for the OpinionLab Feedback icon looks like the following:

```
<script language="javascript" type="text/javascript" charset="windows-1252"
   src="/js/opinionlab/oo_engine.js"></script>

<a href="javascript:O_LC();"><img src="/js/opinionlab/sm_9B9340_oo.gif"
   border="0" title="Feedback" >Feedback</a>
```

A Note on OpinionLab JavaScript Engine Version 3.X

If you are using Version 3.X JavaScript engine from OpinionLab, a known conflict between OpinionLab and Tealeaf may affect Firefox visitors to your website. The unload event in Version 3.X of the engine triggers the display of Event Driven Comment Cards but causes Tealeaf replay to fail on Firefox browsers.

About this task

To fix:

You can deploy either of the following solutions.

Procedure

1. This issue has been addressed in Version 4.X of the OpinionLab JavaScript engine. For more information on upgrading, see `http://www.opinionlab.com`.
2. If you do not want to use the Event Driven Comment Cards, the unload event can be removed from the OpinionLab JavaScript.
   a) In Static or Floating versions of the 3.X Javascript engine, look for the following function:

   ```
   function _fPe(){if(Math.random()>=1.0-_poE){O_LC();_poX=0.0}};
      function _fPx(){if(Math.random()>=1.0-_poX)O_LC()};window.onunload=_fPx;
   ```

   b) From the above function, you can remove the following item:

```
window.onunload=_fPx;
```

Integrating Tealeaf Visitor Sessions into OpinionLab Feedback

You can configure Tealeaf and OpionionLab Feedback to insert a Tealeaf visitor-session ID into OpinionLab feedback forms. The feedback reviewer can then open and replay the visitor session in Tealeaf.

About this task

Note: In order for Opinion Lab to display a Replay Session link in alerts that open the corresponding Tealeaf session, additional programming tasks are required.

When comments are submitted, OpinionLab must first receive and store the Tealeaf Session ID in the OpinionLab Custom Variable field. In a rendered page, the modified OpinionLab included on a client's website should look like the following:

```
<script language="javascript" type="text/javascript" charset="windows?1252"
   src="/onlineopinionF3cS/oo_engine.js">
</script>

<script language="javascript" type="text/javascript" charset="windows?1252"
   src="/onlineopinionF3cS/oo_conf_en-US.js">
</script>

<script language="javascript" charset="windows-1252" type="text/javascript"
   charset="windows-1252"> custom_var='6A51FFBF1B98B39C1DB29100377B02AC'
</script>
```

Procedure

1. To enable, you must expose the Tealeaf cookie that stores the browser session ID and insert the code to write this ID to the OpinionLab Custom Variable field, which is listed above as `custom_var`.

   OpinionLab enables the integration functionality in the client Toolkit as part of the provided Javascript.
2. In the left navigation of the OpinionLab online dashboard, select the Monitoring / Alerts link in the Reporting Admin section.
3. Create a new alert or edit an existing alert.
4. Locate the Tealeaf Integration section. Make the following modifications to this section:
   - Enter the Tealeaf Host Name (`Host`), Field ID (`Field`), and Service Name (`WebServiceName`).
   - The remaining fields (`MD5`, `SessionPreference`, and `LinkType`) are unused in this integration and are hardcoded as part of the Replay Session link.
   - With the collected Session ID, the above configuration information is inserted into the requested URL submitted to the Tealeaf Portal when the Replay Session link is clicked from an OpinionLab email alert.
   - The code required to generate this dynamic link is available to Tealeaf customers who purchase an integration solution so that OpinionLab can immediately respond to customer requests to integrate.

Results

The resulting URL string that is generated from the Replay Session link looks like the following:

```
http://%(tleaf_hostname)/%(tleaf_servicename)/cxConnect.asmx/
   GetSessionReplayLink?
Location=2&LinkType=1&Field=%(field_id)&Value=%(tleaf_id)&
SessionDate=%(session_date)&SessionPreference=3&MD5={md5}&Redirect=true
```

Note: URLs referring to `Portal.asmx` are also accepted. These legacy URLs are automatically remapped to use `cxConnect.asmx`, which is the preferred standard for this integration method. See "cxConnect Integration through replay links" on page 6.

In the table below, you can review the URL parameter, its corresponding name, and a description. Values that are listed in the description correspond to the values generated by OpinionLab, which are converted to string values before execution by the Tealeaf Portal Server.

Table 4. Integration of Tealeaf with OpinionLab

Parameter	Name	Description
`tleaf_hostname`	**Tealeaf Host Name**	The hostname of the Tealeaf replay server the client is running locally.
`tleaf_servicename`	**Tealeaf Service Name**	The publishing point of a particular replay instance. Some clients have multiple Service Names for multiple websites within their Tealeaf application.
`Location`	**Location**	Variable indicates the type of session. OpinionLab generates links for completed sessions only; this value is always set to 2. This parameter is referred elsewhere as **SessionType**.
`LinkType`	**LinkType**	The type of link to generate: • `RTV = 1` • `BBR = 2`
`Field`	**Tealeaf Field ID**	Required variable for Tealeaf to identify the Tealeaf field from the generated URL above. See "Field Variables" on page 15.
`Value`	**Custom Variable Value**	The identifier that is used to locate the Tealeaf session.
`MD5`	**MD5**	When set to `true`, the query uses the MD5 of the `custom_var` value. For example, no TLTSID is generated, yet the LoginID value is available.
`SessionDate`	**Tealeaf Session Date**	The date of the OpinionLab form submission.
`SessionPreference`	**Tealeaf Session Date**	If the `Field` value corresponds to multiple sessions, this value identifies the preference of which session to select: • `EARLIEST = 1` • `LATEST = 2` • `ANY = 3` • `CLOSEST = 4`
`Redirect`	**Redirect Status**	When set to 1, this parameter determines if additional application processing is required. For the OpinionLab integration, create live links by setting this value to 1.

Field Variables
The following variable names can be inserted into the `Field` entry into the query.

Field Variable
Description

`TLTSID`
Tealeaf session identifier. This value is used typically.

`TLTUID`
Tealeaf user identifier

`LoginID`
Tealeaf login identifier.

- This value is valid for pre-Release 8.0 systems and is maintained for backwards compatibility. In Release 8.0 and later, it maps to `CustomVar0` and may be deprecated in a future release. See "Field Compatibility Mapping" on page 9.

`UserDef1` - `UserDef4`
User-defined variables 1 - 4.

- These values are valid for pre-Release 8.0 systems and are maintained for backwards compatibility. In Release 8.0 and later, they map to `CustomVar1` - `CustomVar4` and may be deprecated in a future release. See "Field Compatibility Mapping" on page 9.

`SessionAttribute0` - `SessionAttribute58`
Session attributes 0 - 58.

- These values are valid for pre-Release 8.0 systems and are maintained for backwards compatibility. In Release 8.0 and later, they map to `CustomVar5` - `CustomVar63` and may be deprecated in a future release. See "Field Compatibility Mapping" on page 9.

`CustomVar0` - `CustomVar63`
User-defined session attributes (Release 8.0 or later).

Inserting OpinionLab Feedback into Tealeaf Visitor Sessions

The data insertion method of integration allows data to be associated between IBM Tealeaf and OpinionLab. You can integrate the two systems by configuring OpinionLab to make a request that includes the data to be associated as query string parameters posted to the Tealeaf Target Page.

Note: Make sure that the Tealeaf Target Page is deployed in the location where the library is configured to post to it.

How the Feedback Insertion Works

When a customer submits feedback through OpinionLab, a **Thank You** page is displayed by OpinionLab. The page is served by OpinionLab servers and does not pass through the data stream that is capture by Tealeaf. A tag must be added from the OpinionLab **Thank You** page to the Tealeaf target page to insert the feedback into the Tealeaf visitor session.

The tag should include the query parameters that contain the data that is submitted by the customer. The data includes the parameter name, *VOCName*, and the customer feedback comment along with any other customer feedback questions that are identified to import to Tealeaf. For more information on how to add the tag from the **Thank You** page to the Tealeaf target page, contact your OpinionLab Client Experience representative.

Note: You can specify to OpinionLab what feedback questions to include for the Tealeaf post. A typical feedback includes all of the feedback questions, but a subset of the feedback questions can be selected. You can also specify which feedback questions use the set of predefined common feedback parameter names in order to use the prebuilt Tealeaf VOC reports.

Inserting OpinionLab Feedback into Tealeaf Visitor Sessions

Use the following steps to configure OpinionLab to insert customer feedback into Tealeaf visitor sessions.

Before you begin

Note: IBM TealeafcxConnect for Voice of Customer is enabled through a valid Tealeaf license. Make sure your Tealeaf license includes cxConnect for Voice of Customer.

Procedure

1. Contact your OpinionLab Client Experience representative to:
   a) Configure the OpinionLab feedback to use the prebuilt feedback parameters defined within Tealeaf.
      For more information, see "Prebuilt Feedback Parameters" on page 16.
   b) Enable the OpinionLab **Thank You** page.
   c) Add a POST request to send the customer feedback from the **Thank You** page to the Tealeaf target page.

      The POST request is used to pass the feedback parameters that contain the online feedback that was submitted by the customer. The data is associated between Tealeaf and OpinionLab through the VOC Name-Value Pair.

      For more information about the VOC Name-Value Pair, see "Name-Value Pair API Integration Solution" on page 25. For an example of how the feedback integration can be implemented, see "Example Feedback Integration" on page 17.
2. Test your integration of OpinionLab and IBM TealeafcxConnect for Voice of Customer.
   For more information, see "Testing OpinionLab Feedback Integration" on page 18.

Prebuilt Feedback Parameters

The following prebuilt feedback parameters can be used with the prebuilt Tealeaf VOC reports. Customized parameters can also be created.

Note: Each parameter may only contain one value or contain no value, except for VOCName which must contain a value.

Note: A parameter is assigned a value using an equal sign (=).

Note: Name-value pairs use an ampersand (&) to assign values. For example, `VOCName=Survey+Now&CSatRating=6&Comment=Your+site+is+confusing+and+hard+to+find+anything.&Page=http://www.straussandplesser.com/store/&SiteVisitReason=Check+Order+Status` shows name-value pairs in the query string that contains common feedback, which includes customer satisfaction rating, verbatim feedback for an open-ended question, the page from which user came from to provide feedback, and the reason for visiting the customer's online site.

Table 5. Prebuilt Feedback Parameters

Parameter	Data Type	Description
VOCName	String	This name is required for each post to be a viewable page in Tealeaf. The value should be the identifier for the VOC vendor.
Comment	String	Verbatim feedback for one open-ended question.
CommentReason	String	Structured response selection from a customer-defined list of values for the reason why feedback is being provided. Do not use this parameter name for open-ended verbatim feedback.
ContentRating	Integer	While this can be any integer, pre-defined templates assume a rating scale of 1 to 5 for the site content rating.

Table 5. Prebuilt Feedback Parameters (continued)		
Parameter	**Data Type**	**Description**
CSatRating	Integer	While this can be any integer, pre-defined templates assume a rating scale of 0 to 10 for the customer satisfaction rating.
DesignRating	Integer	While this can be any integer, pre-defined templates assume a rating scale of 1 to 5 for the site design rating.
OverallRating	Integer	While this can be any integer, pre-defined templates assume a rating scale of 1 to 5 for the overall site rating.
Page	String	The page from which user came from to provide feedback.
SiteVisitReason	String	Structured response selection from a customer-defined list of values for the reason for visiting the customer's online site. Do not use this parameter name for an open-ended reason.
SiteVisitReasonSuccess	Boolean	Structured response selection for Boolean type to indicate whether the visitor was successful accomplishing the reason for their visit to the online site.
Statement Rating	Integer	Any integer can be used. Predefined templates assume a rating scale of 0 to 10 for rating the statement.
UsabilityRating	Integer	Any integer can be used. Predefined templates assume a rating scale of 1 to 5 for the site ease-of-use rating.

Example Feedback Integration

The following example demonstrates how Tealeaf captures OpinionLab content from the straussandplesser.com demonstration website.

About this task

Procedure

1. When the customer clicks the Feedback link on the customer site, the initial OpinionLab page is displayed.
2. When the source for the OpinionLab page is viewed, the additional form POST references the target page and the submitted data points as parameter name-value pairs.

```
// Add hidden inputs
var form = document.createElement("form");
form.target = iframeName;
form.action = "http://www.straussandplesser.com/store/js/tealeaf/TeaLeafTarget.php";
form.method = "POST";
form.style.display = "none";

// repeat for each parameter
function createInput(name, value){
  var input = document.createElement("input");
  input.type = "hidden";
  input.name = name;
  input.value = value;
  return input;
}
form.appendChild(createInput("VOCName","OpinionLab"));
form.appendChild(createInput("OverallRating","1"));
form.appendChild(createInput("ContentRating","1"));
form.appendChild(createInput("DesignRating","2"));
form.appendChild(createInput("UsabilityRating","2"));
form.appendChild(createInput("Comment","I have 4 items in my cart online. 2 of the items are
not
getting the discounts like the main site says"));
form.appendChild(createInput("CommentReason","Website - Checkout"));
```

```
form.appendChild(createInput("Page","http%3A%2F%2Fwww%2Estraussandplesser%2Ecom%2Fstore
%2F"));
form.appendChild(createInput("SiteVisitReason","Browse Products and Prices"));
form.appendChild(createInput("CSatRating","4"));
```

Note: The changes to the ThankYou template to include the form post and query parameters are beyond the scope of this document. Review the documentation or contact technical support for OpinionLab for more information. In order for the OpinionLab form to post, you need to provide the correct domain and location of the Tealeaf target page to OpinionLab.

Results

Replay of the Tealeaf session displays the form post on the target page and OpinionLab comments as a query string. The comment card data that is passed in the query string is inserted into the `[urlfield]` section of the request. The actual parameter names, except for *VOCName* might vary as each implementation of the OpinionLab comment card can be unique and customized to client specifications. The *VOCName* parameter must be included in the query string for Tealeaf to insert the data into the visitor session. You can use predefined parameter names for common feedback to take advantage of prebuilt Tealeaf VOC reports. For more information about the prebuilt Tealeaf VOC reports, see "Prebuilt Feedback Parameters" on page 16.

Testing OpinionLab Feedback Integration

It is recommended to test your integration of OpinionLab feedback with Tealeaf.

About this task

There are no Tealeaf-specific changes required on the web application for Tealeaf integration. Use the following steps to validate a normal OpinionLab setup.

Procedure

1. Verify that the Tealeaf target page and parameters are working.
2. Verify that customer feedback is being inserted from OpinionLab to the visitor sessions in Tealeaf.

Verifying Target Page and Parameters

To verify the target page and parameters, complete the following.

Procedure

1. Open the page where the Feedback link is provided.
2. Check the HTML source on that page. Verify that the OpinionLab Javascript and Feedback link are correctly configured.
3. Use the web application to create a session that includes filling out all of the fields of the OpinionLab comment card; then, submit comment card.
4. After the comment card has been submitted, verify that a Thank You page is displayed. This important step verifies that the ThankYou page has properly executed the call to the target page.
5. View the page source on the ThankYou page and verify the following:
   - The target page reference is accurate.
   - The parameters include VOCName.
   - The parameters include the parameter names for all feedback questions identified by the customer to include for Tealeaf.
   - If prebuilt Tealeaf VOC reports will be used for applicable common feedback, verify that parameter names match the names that are defined in Common Feedback.

Verifying OpinionLab Feedback insertion into Tealeaf

To verify that the OpinionLab Feedback insertion into Tealeaf is successful, complete the following.

Procedure

1. Search for the session in Tealeaf using the **Text in Request** field. Configure the **Text in Request** field to include `VOCName`.

   The `VOCName` exists in every posted feedback record.
2. Open the session in Replay.
3. Click the target page to view the feedback that was submitted.

   The feedback is presented as a table and lists each form field in one column and the value for each form field in the next column.

   After verifying the target page and parameters, you can verify that the OpinionLab Feedback insertion into Tealeaf is successful.

ForeSee integration solution

The patented ForeSee Results Customer satisfaction survey allows visitors to provide valuable insight anytime, anywhere on a website. The survey pops up on any specific page that is set for customer feedback and provides a comprehensive survey that is customized and controlled by the client.

ForeSee Results product contains a detailed dashboard that allows in-depth analysis of the survey results. When ForeSee Results and Tealeaf's technologies are integrated, the power of Customer Voice and Customer Experience are brought together to enhance insight into the overall customer experience. In the ForeSee Results Online dashboard, a list of customer feedback surveys is displayed. A Tealeaf Session Replay link is added next to every user survey. Admins reviewing customer comments can immediately open the customer's Tealeaf session and view the customer experience that prompted the submitted comments.

Note:
The ForeSee integration is no longer developed in active collaboration with ForeSee to promote the IBM Tealeaf cxConnect for Data Analysis for VoC integration for ForeSee. This is due to Foresee acquiring competitive replay capabilities. However, Tealeaf still sells and supports the integration based on customer demand.

This section describes a method for integrating your Tealeaf solution with ForeSee customer survey solutions.

Note: This integration solution requires components of IBM Tealeaf cxConnect for Data Analysis, a separately licensable component of the IBM Tealeaf CX platform. for more information, please contact your IBM Tealeaf representative.

Setting up ForeSee Results customer satisfaction survey

After the satisfaction survey is configured correctly on the ForeSee Results dashboard, the relevant Javascript, associated files, and the feedback icon must be included in the test page.
The files that are required for setting up the survey will be provided by the customer support engineer at ForeSee Results.
A typical include statement for the ForeSee Results popup survey looks like the following:

```
<script type="text/javascript"
   src="/store/js/foresee/foresee-trigger.js"></script>
```

The url for the `foresee-trigger.js` is specific to a website?s implementation.

Integration of Tealeaf with ForeSee Results

When survey is completed and submitted, ForeSee must first receive and store the Tealeaf Session ID as part of the survey. As part of the integration the following information must be provided to ForeSee Results to be configured at their end for Tealeaf integration. The actual integration is done by ForeSee support engineer as the configuration elements are not exposed through the dashboard.

About this task

Note: No additional programming tasks are required for ForeSee Results to display a Replay Session link in the online dashboard list of surveys.

Procedure

1. The name of the session cookie ? normally this is the Tealeaf Session ID used to track session activity for Tealeaf capture. (identified by ?TLTSID? cookie).
2. The Portal replay link URL ? this is the link to the Tealeaf Portal replay. Typically the link would look like the following:

```
http://%(tleaf_hostname)/%(tleaf_servicename)/cxConnect.asmx/
GetSessionReplayLink?
SessionType=3&LinkType=1&Field=1&Value=<TLTSID_Value>&SessionDate=
&SessionPreference=3
&Redirect=TRUE
```

Results

- The `tleaf_hostname` and `tleaf_servicename` must be replaced with the actual Portal and webservice URL, respectively.
- The `TLTSID_Value` is replaced with the actual value by ForeSee Results when the survey replay link is constructed in the dashboard.

  Note: Tealeaf recommends thoroughly testing the Portal replay link URL to ensure accuracy before providing it to ForeSee. A stored session's sessionID can be used for the `TLTSID_Value`.

Note: URLs referring to `Portal.asmx` are also accepted. These legacy URLs are automatically remapped to use `cxConnect.asmx`, which is the preferred standard for this integration method. See "cxConnect Integration through replay links" on page 6.

In the table below, you can review the URL parameter, its corresponding name, and a description. Values listed in the description correspond to the values generated by ForeSee Results, which are converted to string values before execution by the Tealeaf Portal Server.

Table 6. Integration of Tealeaf with ForeSee Results

Parameter	Name	Description
`Tleaf_hostname`	**Tealeaf Host Name**	The hostname of the Tealeaf replay server the client is running locally.
`Tleaf_servicenam e`	**Tealeaf Service Name**	The publishing point of a particular replay instance. Some clients have multiple Service Names for multiple websites within their Tealeaf application.
`Location`	**Location**	Variable indicates the type of session. ForeSee generates links for completed sessions only; this value is always set to 2. This parameter is referred elsewhere as `SessionType`.

Table 6. Integration of Tealeaf with ForeSee Results (continued)		
Parameter	**Name**	**Description**
`LinkType`	**LinkType**	The type of link to generate: • 1 = RTV • 2 = BBR
`Field`	**Tealeaf Field ID**	Required variable for Tealeaf to identify the Tealeaf field from the generated URL above.
`Value`	**Custom Variable Value**	The identifier that is used to locate the Tealeaf session.
`MD5`	**MD5**	When set to `true`, the query uses the MD5 of the `custom_var` value. For example, no TLTSID is generated, yet the LoginID value is available.
`SessionDate`	**Tealeaf Session Date**	The date of the Survey form submission. Since the datetime stamp must be in GMT, it is recommended for now to leave this field blank to cover all available dates in the Portal.
`SessionPreference`	**Tealeaf Session Preference**	If the `Field` value corresponds to multiple sessions, this value identifies the preference of which session to select: • 1 = earliest • 2 = latest • 3 = any (default) • 4 = closest
`Redirect`	**Redirect Status**	Set the value to 1 to create a live link to the replay session.

Example ForeSee Results Integration - straussandplesser.com
The following example demonstrates how the survey is configured and integrated with ForeSee Results using the Strauss & Plesser site, a retail site maintained by Tealeaf that is available on the public internet.

About this task

Procedure

1. To see example ForeSee Results popup survey and content on the Strauss & Plesser site, please visit `http://www.straussandplesser.com/store/index.php/foresee`.
2. After cookies are cleared and the page loaded, a prompt is provided asking to participate in the survey.
3. If the **Yes, I'll give feedback** button is selected, then a follow-up page provides the survey questionnaire.
4. After the survey is submitted, it is displayed in the list of surveys for that date on the ForeSee Results dashboard.

   Note: Respondents submitted on any day will appear on the ForeSee dashboard only the next day.

Testing ForeSee Results Integration
Please complete the following steps to test the integration.

About this task

Procedure

1. Open the page where the Customer Satisfaction Survey link has been configured.
2. Check the HTML source on that page. Verify that the ForeSee provided Javascript link is correctly configured.
   - For more information on including the Javascript, see "Setting up ForeSee Results customer satisfaction survey" on page 19.
3. Through the web application, generate a session that includes filling out and submitting the ForeSee survey.
4. After the survey has been submitted, verify that a Thank You page is displayed.
5. Logon to the ForeSee Results dashboard.
6. Select **Channel** > **Web**. Click the Respondents tab.
7. Select the appropriate dates on the left sidebar.
8. A list of surveys is displayed. The Tealeaf Replay link should appear for each of them.
9. Select one Tealeaf Replay link to launch the IBM Tealeaf CX RealiTea Viewer and replay the session.

   Note: The replay of the session does **not** replay the survey form or its content, as it is not part of the Tealeaf capture data. The integration provides a way to access the user session that generated the survey form data.

   Note: The replay of the session is dependent on several factors, including access to the Tealeaf Portal from the client PC, availability of the session based on the archive days in the Portal, network access, and firewall rules.

iPerceptions Integration Solution

The iPerceptions 4Q suite provides a cost-effective yet sophisticated method to capture website visitor feedback and to use the insights to plan for success. These simple satisfaction surveys enable visitors to make quick contributions to customer satisfaction initiatives while providing valuable data on your overall customer experience.

This section describes a method for integrating your Tealeaf solution with iPerceptions customer survey solutions. When this solution is deployed, you can embed a session replay link in the Feedback form, so that your employees can reference the customer's session while evaluating the specifics of the submitted feedback.

For more information on the replay link method of integration, see "cxConnect Integration through replay links" on page 6.

Note: This integration solution requires components of IBM Tealeaf cxConnect for Data Analysis, a separately licensable component of the IBM Tealeaf CX platform. For more information, for more information, please contact your IBM Tealeaf representative.

Session replay link integration with Tealeaf

When a 4Q Feedback form is submitted, the following steps must be implemented to create the Tealeaf Replay link.

About this task

Note: No additional programming tasks are required for iPerceptions to display a Replay Session link in a 4Q Feedback form.

Procedure

1. The Tealeaf sessionization cookie that stores the browser session ID must be included as part of the replay link. In the case of a Weblogic site, it might be the JSESSIONID or native Tealeaf cookie using Cookie injector.
2. On the page where the Feedback email is constructed, the Tealeaf session replay link must be included at the bottom of the email as a HREF link.
3. The dynamic portion of the link unique to each session is the value of the `Field`, which identifies the Sessionization field to use. The `Value` field contains the actual value for the session that generated the feedback form.
4. To integrate:
   a) Read and acquire the JSESSIONID cookie value for the session.
   b) Use that session identifier to construct the replay link as described below.

Results

The resulting URL string that is generated for the Replay Session link looks like the following:

```
http://%(tleaf_hostname)/%(tleaf_servicename)/cxConnect.asmx/
   GetSessionReplayLink?
   Location=2&LinkType=1&Field=%(field_id)&Value=%(tleaf_id)&
   SessionDate=%(session_date)&SessionPreference=3&MD5={md5}&Redirect=true
```

Note: URLs referring to `Portal.asmx` are also accepted. These legacy URLs are automatically remapped to use `cxConnect.asmx`, which is the preferred standard for this integration method. See "cxConnect Integration through replay links" on page 6.

URL Parameters

In the table below, you can review the URL parameters, their corresponding names, and descriptions.

Table 7. URL Parameters

Parameter	Name	Description
`tleaf_hostname`	**Tealeaf Host Name**	The hostname of the Tealeaf replay server the client is running locally.
`tleaf_servicename`	**Tealeaf Service Name**	The publishing point of a particular replay instance. Some clients have multiple Service Names for multiple websites within their Tealeaf application.
`Location`	**Location**	Variable indicates the type of session. iPerceptions generates links for completed sessions only; this value is always set to 2. This parameter is referred elsewhere asSessionType.
`LinkType`	**LinkType**	The type of link to generate: • RTV = 1 • BBR = 2
`Field`	**Tealeaf Field ID**	Required variable for Tealeaf to identify the Tealeaf field from the generated URL above.

Table 7. URL Parameters (continued)		
Parameter	**Name**	**Description**
`Value`	**Custom Variable Value**	The identifier that will be used to locate the Tealeaf session.
`MD5`	**MD5**	When set to true, the query uses the MD5 of the custom_var value. For example, no TLTSID is generated, yet the LoginID value is available.
`SessionDate`	**Tealeaf Session Date**	The date of the form submission.
`SessionPreference`	**Tealeaf Session Date**	If the Field value corresponds to multiple sessions, this value identifies the preference of which session to select: • `EARLIEST = 1` • `LATEST = 2` • `ANY = 3` • `CLOSEST = 4`
`Redirect`	**Redirect Status**	When set to 1, this parameter determines if additional application processing is required. For the integration, create live links by setting this value to 1.

Field Variables

The following variable names can be inserted into the `Field` entry into the query.

Table 8. Field variables	
Field Variable	**Description**
`TLTSID`	Tealeaf session identifier. This value is used typically.
`TLTUID`	Tealeaf user identifier
`LoginID`	Tealeaf login identifier. This value is valid for pre-Release version 8.0 systems and is maintained for compatibility with earlier versions. In Release version 8.0 and later, it maps to `CustomVar0` and might be deprecated in a future release. See "cxConnect Integration through replay links" on page 6.
`UserDef1 - UserDef4`	User-defined variables 1 - 4. These values are valid for pre-Release version 8.0 systems and are maintained for compatibility with earlier versions. In Release version 8.0 and later, they map to `CustomVar1 - CustomVar4` and might be deprecated in a future release. See "cxConnect Integration through replay links" on page 6.

Table 8. Field variables (continued)	
Field Variable	**Description**
`SessionAttribute0 - SessionAttribute58`	Session attributes 0 - 58. These values are valid for pre-Release version 8.0 systems and are maintained for compatibility with earlier versions. In Release version 8.0 and later, they map to `CustomVar5` - `CustomVar63` and might be deprecated in a future release. See "cxConnect Integration through replay links" on page 6.
`CustomVar0` - `CustomVar63`	User-defined session attributes (release version 8.0 or later).

Example URL
A sample replay link looks like the following:

```
http://tealeafportal.mycompany.com/PortalAPI/cxConnect.asmx/
   GetSessionReplayLink?Location=3&
   LinkType=RTV&Field=Customvar0&
   Value=nQHWTJrYGBL55nW4RL0CLk4YZtxK6sQ95lQPT31p1tRbCn0Q7pkT!1648330458&
   SessionDate=&SessionPreference=ANY&Redirect=true&MD5=FALSE
```

The `tealeafportal.mycompany.com` is replaced with the actual Tealeaf Portal URL.

Note: The above assumes that the JSESSIONID is being populated to the `CustomVar0` session attribute via events that have been defined through the Tealeaf Event Manager. See "TEM Events Tab" in the *IBM Tealeaf Event Manager Manual*.

Note: The Portal must be accessible from the email client when the Feedback form submission is being viewed by the visitor.

Testing the Integration
You can test the URL replay link by manually entering the link in a browser on a machine that has access to the Portal.

Note: Tealeaf recommends thoroughly testing the Portal replay link URL to ensure accuracy. A stored session's sessionID can be used for the `Value` parameter.

- Appropriate values must be populated for the `Customvar0` and `Value` entries to ensure that there is a matching session in the Portal.

If the session replays, the integration is working properly.

Note: The replay of the session does **not** replay the survey form or its content, as it is not part of the Tealeaf capture data. The integration provides a way to access the user session that generated the survey form data.

Note: The replay of the session is dependent on several factors, including access to the Tealeaf Portal from the client PC, availability of the session based on the archive days in the Portal, network access, and firewall rules.

Name-Value Pair API Integration Solution

The IBM Tealeaf VOC Name-Value Pair (NVP) API allows VOC vendors and Tealeaf mutual customers to integrate their online feedback with their Tealeaf solution using the data insertion method of integration. Data is associated between the two systems by configuring VOC feedback, at successful submission of the online feedback, to send post requests that include the feedback data as query string parameters to

the **Tealeaf Target Page** on the customer's web infrastructure. This equips the customer to conduct Tealeaf investigative analysis using VOC data to segment Tealeaf sessions.

Basic steps for integrating with Tealeaf

This procedure outlines the basic steps that are needed to integrate with Tealeaf using the NVP API.

Procedure

1. When a customer successfully submits their online feedback, send a POST request to the **Tealeaf Target Page**.
2. The customer should provide you with the site root relative path for the **Tealeaf Target Page**. The **Tealeaf Target Page** is typically `TealeafTarget.`php, `TealeafTarget.jsp`, `TealeafTarget.asp`, or a similar root relative path.
3. The post should include the query parameters that are used to identify the data as online feedback. The post should also include the feedback data that is submitted by the customer. The data might be a subset of the VOC feedback, which is based on what the customer intends to consume in their Tealeaf solution.

Query parameters syntax

The query parameters in your post should follow the specific syntax that includes name, value, and format.

Name syntax

The following rules must be followed for the name syntax.

- Name syntax is case-sensitive.
- Name syntax is case-sensitive. The post must include name `VOCName` to be a viewable page in Tealeaf.
- Each name should be unique.

You must define which feedback parameters to post to Tealeaf, and then define each name so that they can identify the feedback in Tealeaf.

The following set of Tealeaf pre-defined names can be used where the feedback is appropriate for the customer to take advantage of the set of pre-built Tealeaf templates. This set of pre-defined names are established for feedback commonly included by the customer, and are known as *common feedback*. Some or all of these Tea-leaf pre-defined names for common feedback can be used as applicable.

You can define names other than those names reserved for common feedback. Customer-defined names are known as *custom feedback*.

Table 9. Query parameters

Name	Value type	Description
`VOCName`	This name is required for each post to be a viewable page in Tealeaf.	
`Comment`	Unstructured	Verbatim feedback for one open-ended question.
`Page`	URL	The page from which user came from to provide feedback.
`CommentReason`	String	The structured response selection from a customer-defined list of values for the reason why feedback is being provided. Do not use this parameter name for open-end verbatims.

Table 9. Query parameters (continued)		
Name	**Value type**	**Description**
`SiteVisitReason`	String	The structured response selection from a customer-defined list of values for the reason for visiting the customer's online site. Do not use this parameter name for open-end verbatims.
`SiteVisitReason Success`	String	The structured response selection for boolean type to indicate whether the visitor was successful accomplishing the reason for their visit to the online site.
`CSatRating`	Positive integer	While this value can be any integer, pre-defined templates assume a rating scale of 0 to 10 for the customer satisfaction rating.
`OverallRating`	Positive integer	While this value can be any integer, pre-defined templates assume a rating scale of 1 to 5 for the overall site rating.
`ContentRating`	Positive integer	While this value can be any integer, pre-defined templates assume a rating scale of 1 to 5 for the site content rating.
`DesignRating`	Positive integer	While this value can be any integer, pre-defined templates assume a rating scale of 1 to 5 for the site design rating.
`UsabilityRating`	Positive integer	While this value can be any integer, pre-defined templates assume a rating scale of 1 to 5 for the site ease-of-use rating.
`StatementRating`	Positive integer	While this value can be any integer, pre-defined templates assume a rating scale of 0 to 10 for rating the statement.

Value syntax

The following rules must be followed for the value syntax.

- Each name should only contain one value.
- The value might be empty, except for name `VOCName`.
- The value for name `VOCName` should be the identifier for the VOC Vendor

Complete syntax

The following rules must be followed for the complete syntax.

- The name is separated from the value by =.
- The name-value pairs should each be separated by &.

Syntax examples

The following example shows name-value pairs in the querystring for common feedback that includes customer satisfaction rating, verbatim feedback for an open-ended question, the page from which user came from to provide feedback, and the reason for visiting the customer's online site.

```
VOCName=Survey+Now&CSatRating=6&Comment=Your+site+is+confusing+and+hard+to+
find+anything.&Page=http://www.yourwebsite.com/store/&SiteVisitReason=Check
Order+Status
```

The following example shows name-value pairs in the querystring that contains common feedback and custom feedback. This includes the identifier for the survey type (since the customer uses more than 1 survey from the VOC vendor), the overall site rating, the reason why feedback is being provided, and the verbatim feedback for an open-ended question.

```
VOCName=Survey+Now&SurveyType=10975&OverallRating=3&CommentReason=Overall+
Experience&Comment=It+takes+too+long+to+complete+a+purchase.+Is+all+this+i
nformation+necessary?
```

The following example shows name-value pairs in the querystring that contains common feedback and custom feedback. This includes the identifier for the survey type (since the customer uses more than 1 survey from the VOC vendor), the overall site rating, the reason why feedback is being provided, the verbatim feedback for an open-ended question, email address for visitors that want to be contacted, and a would you recommend rating. It contains empty values for the overall site rating and the email address because the visitor did not answer these survey questions.

```
VOCName=Survey+Now&SurveyType=Guest&OverallRating=&CommentReason=Overall+Ex
erience&Comment=It+takes+too+long+to+complete+a+purchase.+Is+all+this+infor
mation+necessary?&Email=&CSATRating=7
```

IBM Tealeaf documentation and help

IBM Tealeaf provides documentation and help for users, developers, and administrators.

Viewing product documentation

All IBM Tealeaf product documentation is available at the following website:

Tealeaf Customer Experience Support

Use the information in the following table to view the product documentation for IBM Tealeaf:

Table 10. Getting help

To view...	Do this...
Product documentation	On the IBM Tealeaf portal, go to **?** > **Product Documentation**.
IBM Tealeaf Knowledge Center	On the IBM Tealeaf portal, go to **?** > **Product Documentation** and select *IBM Tealeaf Customer Experience in the ExperienceOne Knowledge Center*.
Help for a page on the IBM Tealeaf Portal	On the IBM Tealeaf portal, go to **?** > **Help for This Page**.
Help for IBM Tealeaf CX PCA	On the IBM Tealeaf CX PCA web interface, select **Guide** to access the *IBM Tealeaf CX PCA Manual*.

Available documents for IBM Tealeaf products

The following table is a list of available documents for all IBM Tealeaf products:

Table 11. Available documentation for IBM Tealeaf products	
IBM Tealeaf products	**Available documents**
IBM Tealeaf CX	• *IBM Tealeaf Customer Experience Overview Guide* • *IBM Tealeaf CX Client Framework Data Integration Guide* • *IBM Tealeaf CX Configuration Manual* • *IBM Tealeaf CX Cookie Injector Manual* • *IBM Tealeaf CX Databases Guide* • *IBM Tealeaf CX Event Manager Manual* • *IBM Tealeaf CX Glossary* • *IBM Tealeaf CX Installation Manual* • *IBM Tealeaf CX PCA Manual* • *IBM Tealeaf CX PCA Release Notes*
IBM Tealeaf CX	• *IBM Tealeaf CX RealiTea Viewer Client Side Capture Manual* • *IBM Tealeaf CX RealiTea Viewer User Manual* • *IBM Tealeaf CX Release Notes* • *IBM Tealeaf CX Release Upgrade Manual* • *IBM Tealeaf CX Support Troubleshooting FAQ* • *IBM Tealeaf CX Troubleshooting Guide* • *IBM Tealeaf CX UI Capture j2 Guide* • *IBM Tealeaf CX UI Capture j2 Release Notes*
IBM Tealeaf cxImpact	• *IBM Tealeaf cxImpact Administration Manual* • *IBM Tealeaf cxImpact User Manual* • *IBM Tealeaf cxImpact Reporting Guide*
IBM Tealeaf cxConnect	• *IBM Tealeaf cxConnect for Data Analysis Administration Manual* • *IBM Tealeaf cxConnect for Voice of Customer Administration Manual* • *IBM Tealeaf cxConnect for Web Analytics Administration Manual*
IBM Tealeaf cxOverstat	*IBM Tealeaf cxOverstat User Manual*
IBM Tealeaf cxReveal	• *IBM Tealeaf cxReveal Administration Manual* • *IBM Tealeaf cxReveal API Guide* • *IBM Tealeaf cxReveal User Manual*
IBM Tealeaf cxVerify	• *IBM Tealeaf cxVerify Installation Guide* • *IBM Tealeaf cxVerify User's Guide*
IBM Tealeaf cxView	*IBM Tealeaf cxView User's Guide*

Table 11. Available documentation for IBM Tealeaf products (continued)	
IBM Tealeaf products	**Available documents**
IBM Tealeaf CX Mobile	• *IBM Tealeaf CX Mobile Android Logging Framework Guide* • *IBM Tealeaf Android Logging Framework Release Notes* • *IBM Tealeaf CX Mobile Administration Manual* • *IBM Tealeaf CX Mobile User Manual* • *IBM Tealeaf CX Mobile iOS Logging Framework Guide* • *IBM Tealeaf iOS Logging Framework Release Notes*

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