Avaya Experience Management™

Getting Started Guide

Release 23.9

October 05, 2023
Revision 1.00

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Contents

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About this guide

The Experience Management Getting Started Guide provides instructions about how to use the Experience Management application for the first time.

Intended audience

This guide is designed for:

- Anyone responsible for planning and setting up systems.
- Anyone responsible for system administration and maintenance.
- Anyone using the product.

Document revision history

Revision	Description of changes
1.00	Initial release.

Chapter 1

Experience Management overview

Experience Management can help you engage with your customers and employees to capture, analyze, and act on their feedback in a closed-loop process across the organization. Designed specifically for business users, this flexible, scalable solution includes:

- Multichannel surveying for capturing customer input across locations and telephone, email, web, SMS, and mobile channels.
- Multimodal campaigns for deploying a single survey easily across two or more communications channels.
- Conditional logic and branching based on campaign type to allow specific interactions by audience.

With Experience Management, you can transform customer feedback into actionable insights to enhance customer service, satisfaction, and loyalty by:

- Creating branded surveys and emails using dozens of templates, questions, and themes.
- Centralizing multichannel feedback and case management initiatives on a single, scalable solution.
- Managing satisfaction and loyalty program metrics, such as promoter score.
- Enabling easy survey participation through mobile-optimized surveys.
- Targeting and segmenting customers to gain deeper insight through panels.
- Identifying future trends and operational improvements.
- Measuring employee feedback to help improve training and retention.

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Chapter 2

System requirements

Designing surveys

Experience Management is a web-based application that requires the following to design surveys:

- Microsoft Edge (most recent version)
- Safari (most recent version)
- Chrome (most recent version)
- Firefox Browser (most recent version)

Taking surveys

These are based on what is currently verified (other browsers are likely to work as well).

For Windows:

- Microsoft Edge
- Chrome (Current – 1 version)
- Firefox Browser (Current – 1 version)
- Opera (Current – 1 version)

For Mac:

- Safari (Current – 1 version)
- Chrome (Current – 1 version)
- Firefox Browser (Current – 1 version)

For iOS:

- Safari (Current – 1 version)

For Android:

- Chrome (Current – 1 version)

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Current – 1 version denotes that we support the current stable version of the browser and the version that preceded it. For example, if the current version of a browser is 24.x, we support the 24.x and 23.x versions.

Other requirements

- A minimum screen resolution of 1024 x 768 is required
- Administrative rights required to install ActiveX component on first use
- A minimum screen width of 1280 is required to access all functionality

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Sign in to Experience Management

Topics

Login page

To log in to the Experience Management application, type your user name or email address in the box, then click **Next**. Type your password in the box then click **Login**.

> You should use a unique email address to log in to the Experience Management application. If the email address is assigned to two or more accounts, then you need to enter your user name or contact a System Administrator.

If you forget your password, click **Forgot Password**. For more information, see Reset password, page 11.

If you type incorrect user name, email address, or password, an error message appears notifying you how many attempts are left before you are locked out. You have 25 incorrect login attempts. If your account has been locked out, contact your system administrator to unlock it. After unlocking, your password remains the same.

> If you try to access the Experience Management application by using an unsupported browser or without enabling cookies in your browser settings, you are redirected to the **Unsupported Browsers** page.

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Reset password

You can reset your password.

Procedure

1. In the **Customer Login** dialog box, click the **Forgot Password** link.
2. In the **Forgot Password** window, type your user name or email address in the **User Name or Email** box, and then click **Send Password**.

   The email message with password recovery link is sent to your email address.
3. In the received email message, click the link.
4. In the **Password Reset** dialog box, type your new password in the **Password** and the **Confirm Password** boxes.
5. Click **Login**.

Your password is now reset and you are automatically logged into the Experience Management.

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Update password

If your password does not meet the latest security requirements or is set to expire in a certain number of days by the administrator, the **Update Password** page opens right after you type your user name and password. In this case, you will be asked to create a new password that meets the defined criteria—the password must be at least 8 characters long and include at least one lowercase letter, one uppercase letter, one digit, no spaces, and no user name.

Procedure

1 On the **Update Password** page, type your old password in the **Password** box.

2 In the **New Password** and **Confirm Password** boxes, type your new password that meets the defined criteria.

3 Click **Continue**.

If your password does not meet the security requirements, you cannot log in to the Experience Management application until you update the password.

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Interstitial page

An interstitial page, if set by the administrator, appears right after you log in to the Experience Management application and if the language or time zone is not specified.

The interstitial page often includes:

- List of all the newly added features and bug fixes
- Notification about the scheduled maintenance tasks
- An alert from Account Management that it is time to renew your account.

If you want to hide the interstitial page, in the upper-right corner of the page, click the **Don’t show this message again** link.

> If the language or time zone is not specified, the **Preferences** page is displayed after you close the interstitial page.

If you want to proceed to the application, click **Continue on to the application**.

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My Account page

Navigation

Account menu > **My Account** option.

You can edit your profile information, change your Experience Management password, define settings for your login experience, decide what charts are selected by default for reports, enable advanced designer options, and adjust email settings.

Profile Information

In the **Profile Information** section, you can define the following options:

- **Display Name** - Enter the name that you want to be displayed in the application.
- **User Name** - The name that you use to log in to the application. Only System Administrator can define and update a user name.
- **Change Password** - Change your password by clicking the link.
- **Role** - The user role determines the access level and defines permissions for users to perform a group of tasks in the application. System Administrator assigns a role to each user within the workgroup.
- **Email** - The email address that you use to log in to the application.
- **Change Email** - Change your email address by clicking the link.

> If your new email address is not unique, an error message appears saying that this email is already used by another user.
> To confirm email address change, you need to enter the confirmation code that you receive to your new requested email address.

- **Default Workgroup** - Select your default workgroup.
- **Hierarchy** - The hierarchy that you are assigned to. System Administrator assigns users to the hierarchy.
- **Display the application in this language** - Select the language of the application user interface.
- **Create projects in this language by default** - Select the language for your projects.
  The survey languages are divided into two groups:
  - **Language Pack Support** – This group includes the survey languages that are supported by the system language packs. A language pack contains the default validation messages, labels, and end pages of the survey in a certain language and is applied to your survey automatically.
  - **Additional Translation Required** – This group includes all languages, except the languages supported by the system language packs. You need to translate the validation messages, labels, and end pages of your survey into the selected language.

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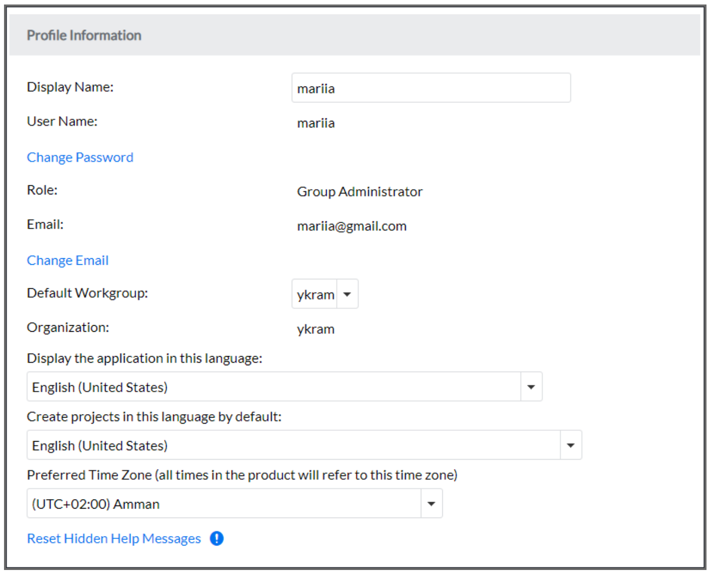
> If you select the blank option in the **Display the application in this language** list, the application will be displayed in the language of your web browser.
> If you select the blank option in the **Create projects in this language by default** list, the project will be created in the language selected for the application.

- **Preferred Time Zone (all times in the product will refer to this time zone)** - Select the time zone for the Experience Management application. All your projects will refer to this time zone.
- **Reset Hidden Help Messages** - Click the link to display features that were previously hidden by clicking **Hide This** or **Don't show this message again** links within the application.



The Profile Information section

> After login, if the application language or time zone is not configured, the **Preferences** page opens. You can set your preferences for time, dates, and numbers to be displayed correctly in the Experience Management application. To proceed to the application, click **Continue**.

Define Log-on Experience

- **Remember the last selected survey project on login** - Select the check box to remember the last survey project you worked on.
- **Display dashboard after login** - Select the check box to display the **Dashboard** page after logging in to the application.

Reports

- **Default chart type for a Choose One question**

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- **Default chart type for a Choose Many question**
- **Default chart type for a Matrix question**

Survey Properties

- **Enable Advanced Designer Options** – Select the check box to view the following items:
  - **Outline and Flow**, **HTML**, and **XML** tabs on the **My Surveys** page.
  - Custom End Pages on the **Pages** tab.
  - Group and project IDs in **Survey Designer** > **Properties** > **API Access**.
  - Campaign ID next to the campaign name, for example, (1) Passcode.
  - Culture code next to **Translation** > **Languages**.

Email

- **Email confirmation is required for processes exceeding** - Type the number of minutes you want the system to wait before sending an email confirmation message.

About

The **About** section displays a copyright statement and information about the Open Source Attribution, End User License, and Intellectual Property Notice.

To save all your changes and preferences, click **Save** either at the top or at the bottom of the **My Account** page.

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Set user preferences

Topics

Preferences page

Navigation

Log in to the Experience Management application > click **Continue on to the application** (if the interstitial page appears).

The **Preferences** page appears right after you log in to the Experience Management application or after clicking the **Continue on to the application** link on the interstitial page if this page appears.

On the **Preferences** page, you can select the language and time zone for your account.

> The **Preferences** page appears if the administrator did not select the language or the time zone for your account.

If you want to select the language, on the **Display the application in this language** menu, select the needed language.

If you want to select the time zone, on the **Preferred Time Zone** menu, select the needed time zone.

If you want to proceed to the Experience Management application, click **Continue**.

Related topics

Interstitial page, page 13

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Chapter 5

Workflow

Topics

Workflow: conduct a survey

There are three simple steps to conduct a survey in Experience Management.

Workflow

1. **Design**: Create questions, style, appearance, logic, validation and more.
   a. Create survey
   b. Add Questions
   c. Format survey
   d. Test survey
2. **Collect**: Who participates, how it is distributed and when it goes live.
   a. Open and publish survey or schedule the publish date
   b. Add campaigns
3. **Analyze**: Review response data, create reports and access customized analytics.
   a. Create and manage reports

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Navigate the User Interface

Navigate the user interface, reset your password (including your Tableau password if applicable), edit your profile, and set your preferences.

My Surveys grid

Navigation

Design & Collect tab > **Surveys** tab > **My Surveys** page.

You can open, design, collect, analyze, view, organize, customize, copy, and delete your surveys. You can also customize the appearance and number of surveys displayed in the grid.

On the **Viewing** menu, you can select the following folders:

- **My Surveys** – View a list of the created surveys.
- **For Review** – View a list of surveys that are being reviewed.
- **Shared Surveys** – View a list of surveys shared with you by other users.
- **Other Users' Surveys** – View a list of surveys created by other users.
- **Recycle Bin** – View a list of surveys that you deleted from your folders.
- **Workgroup** – The workgroup hierarchy is available if you have the **View All Surveys** permissions. The root workgroup is your scoped workgroup. When you select a workgroup on the **Viewing**, all surveys for all users in the selected workgroup and its child workgroups appear in the grid.

The My Surveys folder

The following options are available on the **Actions** menu:

- **Duplicate** – Duplicate the selected survey. In the **Duplicate a Survey** dialog box, you can include all campaigns, participants, and reports associated with this survey by selecting corresponding check boxes or just duplicate a survey without them.
- **Rename** – Change the name of the selected survey.
- **Delete** – Move one or more selected surveys to the recycle bin. You can also select the check box in the column header to select all surveys. If a survey is used as a source in a data set, you cannot delete the survey.
- **Share** – Provide users the **Full Access** to view and edit the selected survey or the **View Access** to view the selected survey.
- **Change Owner** – Select a user to be a new survey owner.
- **New Folder** – Create a new folder or subfolder.
- **Move** – Move the selected survey to a different folder. On the **Actions** menu, point to **Move**, and then click the necessary folder.
- **Preview** – Preview the selected survey in a new window. You can preview all surveys with the **Open**, **Closed**, or **Design** status.
- **Review History** – View the history of all changes made to the survey.

The Recycle Bin folder

The following options are available on the **Actions** menu:

- **Restore** – Move the selected survey from the recycle bin to its original folder location.

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- **Delete Permanently** – Delete the selected survey permanently from the recycle bin. This action removes the survey from the application with all the associated participants lists, invitations, and reports.

> The option is available if you have the **Allow users to permanently delete surveys from the Recycle Bin** check box selected, the **Manage Data Policies** permission to view the **Data Policies** page, and the **Permanently Delete Surveys** permission.To disable the **Delete Permanently** option, clear the check box.

> You can schedule the automatic survey deletion for all your closed surveys on the **Configuration** tab > **Data Policies** tab > **Surveys** tab > **Data Retention** section.

- **Preview** – Preview the selected survey in a new window. You can preview all surveys with the **Open**, **Closed**, or **Design** status to ensure that you want to delete the selected survey before deleting it permanently.

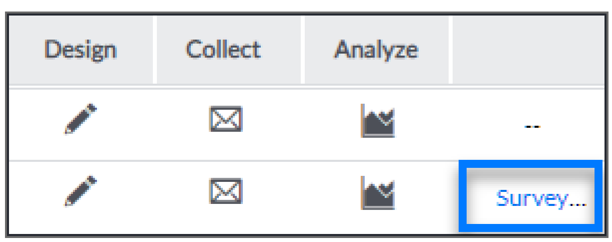
Search for a survey

To search for a survey in the **My Surveys** grid, enter the survey name, tag, or author in the **Search** box on the toolbar, and then click **Search**. The results of the search appear in the grid with the corresponding notification. To delete the search results, click the **Clear** link.

Links

In the **My Surveys** grid, the following links are available for each survey:

- **Design** – Click to create, edit, and review your survey.
- **Collect** – Choose how to collect the results from your survey
- **Analyze** – Export response data from your survey into .xlsx, .csv, and .tsv files.
- **Survey Link** – Click to view a live version of the selected survey.



The Survey link

With the following links, you can:

- **Design** – Create, edit, and review questions and properties.
- **Collect** – Choose how to collect your survey.
- **Analyze** – Export response data from your survey into .xlsx, .csv, and .tsv formats.

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The **Survey Link** is only available for the opened surveys.

Organize the My Surveys grid

To sort your surveys by survey titles, status, or the last modified date, click the corresponding column heading. By default, your surveys are sorted by the last modified date.

You can also change column widths by dragging the edge of column headers.

By default, the **My Surveys** grid shows the first 10 surveys. To view more items per page, use the **View per Page** option at the bottom of the **My Surveys** grid. Click 25, 50, or 100 to display more surveys.

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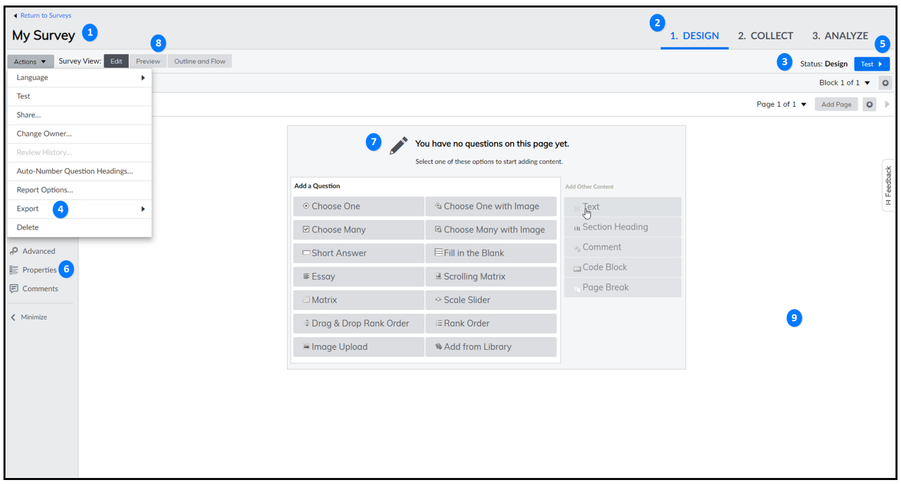
Survey designer overview

Navigation

Design & Collect tab > **Surveys** tab > **My Surveys** page > **New** menu > **Design from Scratch** option.

After you create a survey (using any of the options provided further in this chapter), the survey designer page is displayed, where you can add and edit your survey questions, configure survey logic and design options, export, and test your survey.
This topic provides a brief overview of the features available on a blank survey page and basic instructions for designing a survey from scratch.



The Design tab of a new survey

1 Edit the title of a survey.

> To edit your survey title, click the default survey name, type a new name, and then press **Enter** to save the changes.

2 Create or edit a survey on the **Design** tab.

3 View the status of a survey.

4 Export a survey as a Microsoft Word (.doc), Adobe Acrobat (.pdf), Experience Management Enterprise (.que) file, or Mobile Survey.

5 Test a survey.

6 Change the survey properties, style, and more.

7 Add a question to a survey, and then edit the question text, answers, appearance, validation, and logic properties.

8 View a survey in the **Edit**, **Preview**, or **Outline and Flow** mode.

9 View the added questions and answers here.

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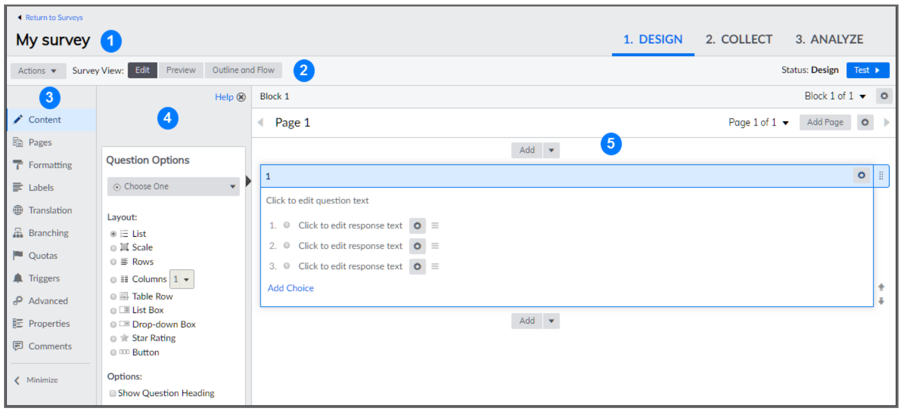
Survey design framework

Navigation

Design & Collect tab > **Surveys** tab > **My Surveys** page > **New** menu > **Design from Scratch** option > **Design** view.

The **Design** view is divided into the following areas. See image and description below.



Areas of the Design tab

1 [Header](), page 26

2 [Toolbar](), page 26

3 [Panel Buttons](), page 26

4 [Side Panel](), page 27

5 [Content](), page 27

Header

The **Header** area includes the title of the survey you are designing, the **Design**, **Collect**, and **Analyze** tabs. The **Header** area has a fixed width but a liquid height, which means the **Header** area expands vertically to fit longer titles.

Toolbar

The **Toolbar** area has the same properties as the **Header** area. It includes the **Actions** menu, the **Survey View** toggle keys, the **Status** indicator, and the **Test** button. The toolbar has a fixed height but a liquid width.

Panel Buttons

The **Panel Buttons** area of the **Design** tab contains a number of side tabs, such as **Content**, **Pages**, **Formatting**, **Labels**, **Translation**, **Branching**, **Advanced**, **Properties**, and **Comments**. This area has

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a fixed height, but a liquid width. The width of this area depends on whether you hide or show button titles.

Side Panel

The **Side Panel** area includes survey options that vary depending on the survey content. This area has a liquid height and fixed width.

Content

The **Content** area of the **Design** tab includes the questions that you have chosen for your survey. In addition, you can edit titles of pages and blocks, manage your pages and blocks using the block and page menus, and navigate between pages and blocks using the menus to the left of the block or page menus. This area has a liquid height and width.

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Chapter 7

User administration

Manage users, roles, hierarchies, and groups. Assign permissions to enable employees to access features and perform tasks according to their roles within your company.

For full details on user and system administration see the *Experience Management User Guide*.

Topics

Users

Navigation

Administration tab > **Users** tab.

You can use the **Users** tab to add new users to a workgroup, import users from a .csv, .tsv, .xlsx, or .txt file, export users to a .csv, .tsv, or Microsoft Excel file format, edit, and remove existing users from a workgroup. On the **Users** page, you can find different information about the users.

The **Users** page shows a number of columns including:

- **User Name** – The name with which the user logs into the product.
- **Display Name** – The name of the user to display in the application.
- **Email –** The user's email address. This is usually used as the **From** address on invitations created by the user.
- **Node** – The node to which the user is assigned.
- **Role** – The user's security role.
- **Groups** - The groups to which the user is assigned.

On the toolbar, you can find the following functionality:

- **Actions** – On this menu, the following options are available:
  - **Add User** – Add a new user to a workgroup. You must have authority under the **Roles** tab to add users.
  - **Assign Membership** – Add selected individual users or groups of users to nodes assigned to your workgroup. One user can be a member of only one node at a time. You can move users from one node to another.
  - **Import** – Import users from a .csv, .tsv, .xlsx, .txt, or .zip file. The contents of the .zip file is scanned before extraction to check whether it contains the supported file formats.
  - **Export** – Export selected users to the .csv, .tsv, or Microsoft Excel file format.
  - **View User's History** – View the login and logout dates and times for a particular user in the current workgroup.
  - **Notify User(s)** – Send an email notification to the selected users in the current workgroup.
  - **Reassign All Cases** – Assign the cases of the selected user to another user. You can reassign cases between users that belong to one hierarchy.
  - **Delete** – Remove selected users from the workgroup.
- **New** – Add a new user to a workgroup. You must have authority under the **Roles** tab to add users.
- **Users**/**Hierarchy/Groups** – Toggle between the **Users**, **Hierarchies**, and **Groups** views.
- **Search** – Enter the name of the user you want to find in the text box and click the **Search** button next to the text box.

By default, the **Users** page shows the first 10 users. To view more items per page, use the **View per Page** option at the bottom of the **Users** page. Select the **25**, **50**, or **100** link to display more users. In addition, if the **Users** page is longer than one page, you can navigate between the pages by clicking the navigation arrows.

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Roles

Navigation

Administration tab > **Roles** tab.

You can create, edit, copy, and delete user roles and corresponding permissions within the application and set the selected role as a default role for all new users.

Having a custom role, you can set the selected role as default one only for users with the same or less permissions than your custom role has.

Experience Management is a role defined application. By using either standard or custom roles, administrators can control the use of each aspect of the application.

The **Roles** page shows a number of columns, including:

- **Name** – The name of the role.
- **Description** – The role's short description.
- **Default** – The default role, which is marked by the check mark.

On the toolbar, you can find the following functionality:

- **Duplicate** – Duplicate the selected role.
- **Delete** – Remove the selected role.
- **Default Role** – Make the selected role as default role for all new users. If you do not assign any role to the users, the default role is assigned to them automatically with the permissions that accompany that role.
- **Create Role** – Create a new role.

> You can click any selected role to change it, except the locked roles.

By default, the **Roles** page shows the first 10 roles. To view more items per page, use the **View per Page** option at the bottom of the **Roles** page. Select the **25**, **50**, or **100** link to display more roles. In addition, if the **Roles** page is longer than one page, you can navigate between the pages by clicking the navigation arrows.

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Groups

Navigation

Administration tab > **Users** tab > **Users** page > **Groups** button.

Use the **Groups** view to manage the groups assigned to your workgroup.

> The **Groups** view is available only if the system administrator configured Feedback Intelligence under **Feedback Intelligence** > **Business Objects** > **Enable FI User Security Automation Features**.

Use the following options to manage groups:

- **Actions** – Select whether you want to add or remove a group from the workgroup.

  The following options are available:

  - **Add Group** – Add a new group to the workgroup.
  - **Delete** – Delete the selected group from the workgroup.
  - **Import** – Import groups from a .csv file.
  - **Export** – Export selected groups to the .csv file format.
- **Add Group** – Add a new group to the workgroup.
- **Users/Hierarchy/Groups** – Toggle between the **Users**, **Hierarchy**, and **Groups** views.
- **Search** – Enter the name of the group in the text box and click the **Search** button.

By default, the **Groups** view shows the first 10 groups on the page. To view more items per page, use the **View per Page** option at the bottom of the **Groups** view. Click 25, 50, or 100 to display more groups.

You can sort survey participants in the view by clicking the column heading. To change the width of a column, drag its edge.

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Configuration

Configure settings for email, SMS and Case management including Case rules. Set survey closure and deletion schedules and manage external Data Sources.

For full details on system configuration see the *Experience Management User Guide*.

Topics

General Setup

Navigation

Configuration tab > **General** tab > **General Setup** page.

You can define settings for your workgroup, portal, panel, and library.

To save your changes, click the **Save Setup** button at the bottom of the **General Setup** page.

Workgroup Setup

In the **Workgroup Setup** section, you can define the following options:

- **Workgroup Name** – Enter the workgroup name, which appears in the application banner when you log in.
- **Workgroup Description** – Enter a short description of the workgroup.
- **Theme** – View the theme for the workgroup.
- **ID** – The workgroup ID number.
- **Survey Publish Warning** – Provide a custom warning that will appear in the **Open Your Survey Now?** dialog box for all survey authors in the workgroup. You can type up to 255 characters in the text box. If you do not specify any custom warning, the default message opens.

> This option is only available for users with the **Group Administrator** role.

- **Enable automatic survey permanent deletion** – Allow the permanent deletion of the surveys from the recycle bin after a specified number of days.

> Enable automatic survey permanent deletion is available only for users with the **Group Administrator** role.

- **Enable publishing to social media sites** – Allow survey authors to publish **Generate Link** survey links to social media sites (for example, Facebook, Twitter, and LinkedIn) within the workgroup. This option is useful if corporate policy prohibits sharing the company branding on personal social networks.
- **Enable significance testing in Cross-tab Analysis** – Disable significance testing using the **Cross-tab Analysis** report for the users in the workgroup.
- **Enable Public Report** – Allow the workgroup members to share reports with the users that do not have access to the application.
- **Enable Public Dashboard** – Allow the workgroup members to share dashboards with the users that do not have access to the application.
- **Automatically remove insecure code from survey designer** – Removes the insecure code that is entered outside of the Code Blocks for the users who do not have the **Edit Code Blocks** permission selected. This option is available for Group Administrator, Survey Administrator, and custom roles with the **Configure Workgroup Options** permission selected.

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- **Store Respondent IP.Location** - this setting allows you to specify if survey respondent inforamation, such as IP address and location, can be tracked when a new survey is created. This can be **Enabled by Default**, **Disabled by Default** or **Always disabled** for survey authors. The default for the setting is Enabled by Default.

Portal Setup

In the **Portal Setup** section, you can define the following options:

- **Enable Portal** – Select the option to enable the portal.
- **Portal URL** – Enter the Portal URL.
- **Portal Registration Profile** – If you want your portal members to complete after they register, select the profile.
- **Require Approval** – If you want administrator to approve each portal registration before the user gains access to the portal, select this check box.

Panel Setup

In the **Panel Setup** section, you can change the default health score for the panel. The health score shows the average activity rate of the panelist. A number of factors determine the health score, for example, email opening rates, survey start and completion rates, and unsubscribe rates. The health score is a value from 0 to 100%.

- **Healthy Panel Threshold** – Enter a value for the healthy score in the provided text box.
- **Unhealthy Panel Threshold** – Enter a value for the unhealthy score in the provided text box.

Library Setup

In the **Library Setup** section, you can define the following options:

- **Enable Featured Survey Themes** – Select this check box to allow users in the workgroup to use precreated featured survey themes. It applies to the themes on the **Library** > **Survey Themes** tab and on the **Formatting** tab in the survey designer.
- **Enable Standard Survey Themes –** Select this check box to allow users in the workgroup to use precreated standard survey themes. It applies to the themes on the **Library** > **Survey Themes** tab and on the **Formatting** tab in the survey designer.
- **Enable Legacy Survey Themes** – Select this check box to allow users in the workgroup to use precreated legacy survey themes. It applies to the themes on the **Library** > **Survey Themes** tab and on the **Formatting** tab in the survey designer.
- **Enable use of System Report Themes** – Select this check box to allow users in the workgroup to use precreated system report themes. It applies to the themes on the **Library** > **Report Themes** tab and on the **Formatting** tab in the report designer.
- **Enable use of System Survey Templates** – Select this check box to allow users in the workgroup to use precreated system survey templates. It applies to the templates on the **Library** > **Survey Templates** tab and on the **New** menu on the **My Surveys** page.

If a featured (standard or legacy) theme is applied to a survey, and you clear the **Enable Featured (Standard or Legacy) Survey Themes** check box, the selected theme still appears in the **Survey**

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Theme menu on the **Survey Formatting** tab, but no other featured (standard or legacy) themes are available.

If a system theme is applied to a report, and you clear the **Enable use of System Report Themes** check box, the selected theme still appears in the **Report Theme** menu on the **Report Formatting** tab, but no other system report themes are available.

Advanced Text Analytics

In the **Advanced Text Analytics** section, you can disable users in the workgroup to export the survey response data for the advanced text analysis by selecting the **Disable Export for Text Analysis** check box.

> The **Advanced Text Analytics** section is available only for the workgroups with the granted Advanced Text Analytics license. To enable the license, contact your system administrator.

Embedded Text Analytics

In the **Embedded Text Analytics** section, you can configure connection to one of the Text Analytics providers: **Verint Text Analytics** or **Verint Text Analytics Services**.

For **Verint Text Analytics** provider, type the URL to connect to the Text Analytics instance and enter the **User Name** and **Password** into the designated text boxes.

For **Verint Text Analytics Services** provider, type the corresponding URLs into the following text boxes:

- **Text Engine** – URL to the system that conducts the data analysis.
- **Configuration Service** – URL to the system that contains all configuration settings.
- **Search** – URL to the search engine.

> To disable Text Analytics connection, select **Disabled**.

You can test the configured connection by clicking **Test** below the **Embedded Text Analytics** section.

> The **Embedded Text Analytics** section is available only for the workgroups with the granted Embedded Text Analytics license. To enable the license, contact your system administrator.

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