

# cc: Survey SIP Administration Guide, v5.3

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Reference Guide

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0	Added Performance Guidelines section; updated Survey Call Linking and Beep Tone Sections Added Manage Surveys and Search Attempted Surveys sections.	2013-12-06

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# Table of Contents

<b>Introduction</b> .....	<b>6</b>
<b>Product Technical Overview</b> .....	<b>7</b>
<b>Requirements</b> .....	<b>9</b>
PBX.....	9
VoIP/SIP Supported PBXs .....	9
Hardware, Software, and Licensing.....	9
CallCopy.....	9
Hardware.....	9
Software .....	9
Licensing .....	9
Performance Guidelines .....	10
Survey Call Linking .....	10
Beep Tone.....	10
<b>PBX Configuration</b> .....	<b>11</b>
Configure VoIP/SIP Endpoints .....	11
Configure DNIS and ANI.....	11
<b>Install and Configure cc: Survey</b> .....	<b>12</b>
Windows Server Tasks .....	12
Install the Server.....	12
Register Service .....	12
Add the Application to the cc: Discover Service Manager .....	12
Security .....	14
Permissions.....	14
Encryption .....	14
Archiving .....	14
Configure Survey.....	15
Configure INI .....	15
Configure Survey Linking.....	17
Install the Survey Script.....	17

Configure INI.....	17
Enable Survey Score Column in Call Lists .....	18
<b>Survey Administration.....</b>	<b>19</b>
Manage DNIS Values .....	19
Add/Edit/Delete Values .....	19
Import Multiple Values .....	19
Specify Survey Audio Directory Settings .....	20
Manage Surveys.....	20
Create A Survey .....	21
Add A Section.....	22
Add A Question .....	22
Question Types .....	24
Threshold Branch Example.....	25
Search Attempted Surveys (Form Search) .....	26
<b>Reports .....</b>	<b>27</b>
Reporting Criteria.....	27
Survey Detail .....	28
Survey Detail Summary .....	29
Survey Overview .....	29
Survey Summary .....	30
Survey Summary by Agent .....	31
Survey Summary by Question.....	32
Survey Summary by Response .....	33
<b>Example PBX Configurations .....</b>	<b>35</b>
Cisco .....	35
Set Route Pattern .....	35
Set SIP Trunk Security Profile.....	37
Configure SIP Profile .....	39
Configure Trunk.....	39
Avaya SIP .....	40
Create Node .....	40

Create Signaling Group .....	41
Create Trunk Group.....	42
Create Route Pattern.....	43
Set ARS Digits.....	44
Disable Mask CPN/Name .....	45
Nortel .....	46
<b>About Uptivity .....</b>	<b>47</b>

# Introduction

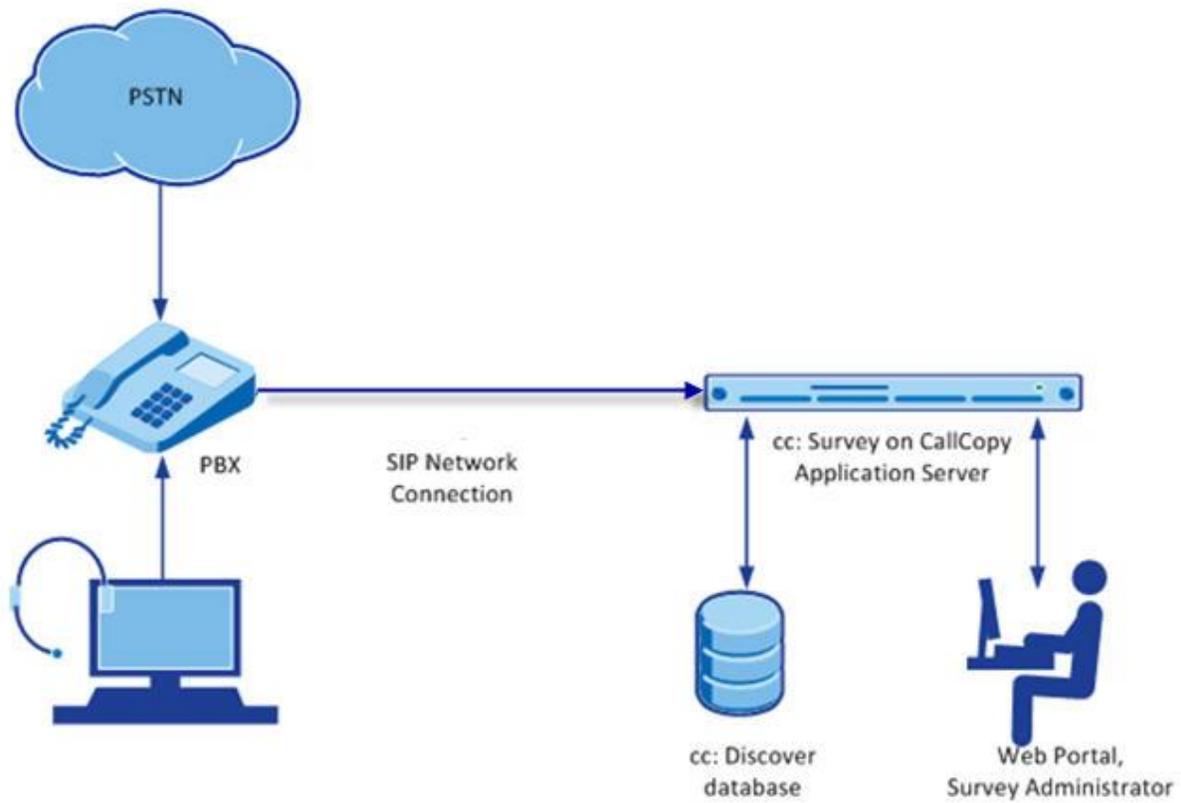
This document explains the customer-premise based version of CallCopy's cc: Survey module. The document is for system administrators, survey administrators, and report users. It covers

- Survey engine administration
- Survey form design and creation
- Reporting

**Note** For information on CallCopy's cc: Survey service, contact your CallCopy representative. That service provides all the functionality of the customer-premise based version, but CallCopy hosts and manages the equipment and data. Users are provided access to the surveys and reporting.

# Product Technical Overview

This diagram illustrates the cc: Survey components and interactions.



Component	Function
<p><b>Callers via PSTN or Agents</b></p>	<p>cc: Survey can be set up to handle calls two ways:</p> <ul style="list-style-type: none"> <li>• A telephone number can be setup and provided to the public. Callers dial the number, and the PBX directs the call to the survey engine.</li> <li>• Agents can transfer callers to the survey engine via the PBX.</li> </ul>
<p><b>PBX</b></p>	<p>A unique DNIS is created on the PBX for each survey. The PBX transfers calls from agents or toll-free numbers to the appropriate DNIS and survey.</p> <p>For each call, the PBX can send the survey engine the</p> <ul style="list-style-type: none"> <li>• DNIS</li> <li>• Caller number or Agent/Extension number as an ANI</li> </ul>
<p><b>cc: Survey</b></p>	<p>cc: Survey consists of the survey engine that executes the survey forms and audio files, records respondent's input and call information to the database, and records respondents' voice comments to WAV files.</p> <p>The directories for the survey form, audio prompt, and verbal response files are located on this machine in most installations, although they can be located on a different machine.</p> <p>Survey and cc: Discover can be hosted by the same machine or separate machines. Survey can also be deployed without cc: Discover.</p>
<p><b>cc: Discover Web Portal</b></p>	<p>Administrators, system administrators, and managers use the Web Portal to</p> <ul style="list-style-type: none"> <li>• Create and manage survey forms.</li> <li>• Configure and manage the server and users' permissions.</li> <li>• Review survey results, reports, and respondents' audio responses.</li> </ul>
<p><b>cc: Discover Database</b></p>	<p>Call information and respondents' input and responses are recorded in this database as survey records. Reports are generated from these records.</p>

# Requirements

## PBX

### VoIP/SIP Supported PBXs

These PBXs are supported:

- Cisco
- Avaya
- Asterisk

### Hardware, Software, and Licensing

Hardware and software requirements vary by PBX. Some PBXs do require licensing for SIP endpoints.

## CallCopy

cc: Survey can be deployed with CallCopy's cc: Discover on the same machine, on a separate machine, or as a standalone product (i.e., no call recording). See the *cc: Discover Requirements* for additional requirements information.

### Hardware

Hardware requirements vary depending on system configurations and usage requirements. Specifications are determined by the CallCopy Sales Engineering team during the sales process.

### Software

This software is required:

- CallCopy cc: Discover Web Portal and database, v5.1 and higher

### Licensing

Contact your CallCopy representative for licensing information.

## Requirements

### Performance Guidelines

The following are general performance guidelines for this product. For more information, see [Survey Call Linking](#).

- Multiple locations or PBXs can use the same survey server, just as multiple locations can use the same recording server. A SIP link will need to be configured for each location or PBX. For details, see [Configure VoIP/SIP Endpoints](#) and/or [Example PBX Configurations](#)
- A dedicated survey server can safely handle 250 SIP channels.
- One survey channel should be considered the same as one concurrent recording when calculating server performance and capacity needs. (The number of survey channels needed varies based on length of survey, acceptance rate, caller engagement, if callers leave audio messages, etc.)

### Survey Call Linking

This feature currently works with:

- Cisco SIP (Uptivity recommends this option rather than TAPI for greater reliability)
- Cisco TAPI SIP
- Avaya SIP

The survey server and the recording server must be in the same time zone in order for call linking to work. If multiple locations or PBXs transfer calls to one survey server, call linking:

- Will work with Avaya SIP, Cisco SIP, and Cisco TAPI SIP.
- Will NOT work if call recording is being done on two different cc: Discover servers and cc: Survey is running on only one of those servers.

### Beep Tone

The SIP Survey software does not play a beep tone at the end of prompt audio files. The user must add a beep tone at the end of the audio file to signal the caller to begin speaking.

# PBX Configuration

See your PBX documentation for specific steps to perform the tasks mentioned in this section.

## Configure VoIP/SIP Endpoints

This section is only for customers who are using VoIP networks and SIP to communicate with the cc: Survey server.

SIP trunk endpoints must be configured on the PBX to direct calls to the Survey server.

Below are sample SIP station configurations from an Asterisk PBX:

- type = peer
- host = (server IP address)
- username = (extension)
- secret = (password)
- dtmfmode = rfc2833
- insecure = very
- context = from-sip

**Note** Some of the CallCopy integration documents may contain useful information on SIP trunk configuration.

## Configure DNIS and ANI

The following PBX configurations must be set:

- A unique DNIS for each survey.
- Call routing to direct both direct calls (i.e., 1-800 calls from customers) and forwarded calls to the cc: Survey engine.
- A dial plan to pass the DNIS and the ANI (i.e., the originating caller or the transferring agent's PBX number -- either the Agent or the Extension) to the Survey engine.

# Install and Configure cc: Survey

This section explains the tasks for installing cc: Survey. Survey can be deployed

- On the same machine as cc: Discover – Only the instructions in this section are needed.
- On a separate machine from cc: Discover –
  - Complete the instructions in this section.
  - Install the cc: Discover Logger service (Logger.exe) and Comet Daemon.
  - On the cc: Discover Web Portal machine, create a new server node and Comet Daemon entry for the Survey machine.
  - Add the Survey machine and both the Logger and Survey to the Service Manager in the Web Portal.
- Without call recording – Complete the cc: Discover installation, skipping tasks for call recording.

Check the *cc: Discover Installation Guide* and *cc: Discover Administration Manual* for instructions on the above tasks.

## Windows Server Tasks

Perform these tasks on the Windows server hosting cc: Survey.

### Install the Server

The cc: Survey server is included with the base cc: Discover install package. Run the installer and select Base Installation. For more information, see the *cc: Discover Installation Guide*.

### Register Service

To ensure normal survey operations, the survey engine should be registered as a service on the Windows server:

Open a Command Prompt window on the Windows server. Change to the CallCopy Recorder\SurveyIvrFx directory. From the directory, run the following command:

```
cc_SurveyIvrFx.exe -svcinst -autostart
```

If successful, the Command Prompt will display the message “Service Installed.”

### Add the Application to the cc: Discover Service Manager

To add the service to the Service Manager, follow the listed steps.

1. Click the cc: Discover Administration tab > Tools > Service Manager.
2. Locate and expand the node created earlier.
3. Click **Add Application**.

4. In the new line, enter the following information:
  - **Application Name:** Enter **CallCopySurveyControllerService**
  - **Auto-Restart:** Select Yes to have the service restarted automatically if it is stopped.
5. Click **Save**.

## Security

### Permissions

Users must be granted permissions to work with surveys. See the "Permissions Definitions" section of the *cc: Discover Administration Manual* for further information.

**Note** Group permissions are not enforced by the survey product. A user who has access to survey reports can see survey results for any agent.

These components need these permissions setup:

- IIS account running cc: Discover Web Portal – Read/Write permissions to the Audio Prompt Upload Directory and the Audio Recording Directory. If Survey is installed on a **separate machine** from Web Portal, the IIS account must be a service account with explicit read/write access to the prompts and recordings directories on the Survey server.
- Survey Module – Read permission to the Audio Prompt Upload Directory. Write permission to the Audio Recording Directory.
- Reporting server – Read permission to the Audio Recording Directory if respondents are allowed to leave audio responses to questions.

The install program set permissions needed for the database and other CallCopy modules.

### Encryption

The audio prompt and audio response recordings are not encrypted. Typically, surveys should not provide respondents sensitive information or ask them to provide sensitive information.

### Archiving

cc: Survey's audio files are not archived.

## Configure Survey

### Configure INI

These settings are used to configure cc\_SurveyIvrFX.exe. Browse to "\Program Files (x86)\CallCopy\Recorder\SurveyIvrFX" and if cc\_surveyIvrFX.ini is not present, create it. The INI filename should always match the name of the executable it configures. Supply the following information using default values (shown in the left column) unless otherwise specified.

<b>[settings]</b>	
ipaddress=127.0.0.1	IP address of the server running the SurveyIvrFX process.
audiopromptdirectory=	Path to audio prompt recordings. For details, see <a href="#">Specify Survey Audio Directory Settings</a> .
audiorecordingdirectory=	Path to audio response recordings. For details, see <a href="#">Specify Survey Audio Directory Settings</a> .
modules=	<p>Comma-separated list of modules the IVR will load. This is used with survey linking.</p> <ul style="list-style-type: none"> <li>For Cisco TAPI, enter CiscoTapi.</li> <li>For Avaya or Cisco SIP trunk, this value should be blank.</li> </ul> <p>To configure a module, add the corresponding section seen below.</p>

The following settings are required for **any** configuration.

<b>[ivr]</b>	
trunktype=SIP	cc_surveyIvrFx currently only accepts SIP for the trunk type.
maximumdigitlengthforaprompt=1	Maximum number of digits the survey will expect to collect. Optional setting, used when you want to be able to have answers that are more than digit.
repeatquestionafterinvalid=N	Used if there is an Invalid_Response file setup and the question must be repeated. Possible values: Y or N. Optional setting, used when you want to repeat the question when an invalid digit is pressed.

## Install and Configure cc: Survey

digittimeout=3000	Length of time Survey waits if the respondent has to enter digits. Possible values: an integer representing milliseconds (i.e., 3000 is 3 seconds). Optional setting, used when you want to increase the time the survey waits to collect digits on the collect digit survey type.
maxpromptbeforetimeout=0	Number of times the listener will be prompted before timing out.
temprecordinglocation=c:\temp_recordings	Temporary storage location while recordings wait to be transcoded.
<b>[trunk]</b>	
channels=0	Number of SIP channels.
localPort=5060	Local SIP port.
remotePort=5060	Remote port for SIP.
basertpport=36000	Initial RTP port for audio.
localaddr=	Resolving IP address for the server running Survey (cannot be 127.0.0.1).
remoteaddr=	IP address(es) of the PBX(s) from which SIP traffic is coming. For multiple PBXs, enter each address separated by a comma.
transporttype=UDP	Required setting. <ul style="list-style-type: none"> <li>• Cisco can use either UDP or TCP</li> <li>• Avaya SIP requires TCP</li> </ul>
ttscodec=0	Text-to-Speech setting. Leave at default value.
ttschunksize=160	Text-to-Speech setting. Leave at default value.
ttschunkduration=20	Text-to-Speech setting. Leave at default value.
filecodec=0	Setting for audio prompt playback. Leave at default value.
filechunksize=160	Setting for audio prompt playback. Leave at default value.
filechunkduration=20	Setting for audio prompt playback. Leave at default value.

## Configure Survey Linking

### *Install the Survey Script*

1. Browse to the directory containing **cc\_SurveyIvrFx.exe**, typically **C:\Program Files (x86)\CallCopy\Recorder\SurveyIvrFx**.
2. Create a **Scripts** folder in that directory.
3. Check with Development to determine which script file needs to be copied to the Scripts folder.

### *Configure INI*

These settings are required for all scripting environments. Browse to "\Program Files (x86)\CallCopy\Recorder\SurveyIvrFX" and open cc\_surveyIvrFX.ini. The INI filename should always match the name of the executable it configures.

[scripting]	
folder=scripts	The folder local to the executable the script(s) are located in.
eventfilter=	<p>Comma separated list of events to filter out.</p> <p>&lt;list&gt; := &lt;item&gt;, &lt;item&gt;, &lt;item&gt;, ..., &lt;item&gt;</p> <p>&lt;item&gt; := &lt;type&gt;   &lt;type&gt;-&lt;reason&gt;</p> <p>&lt;type&gt; := numeric type code</p> <p>&lt;reason&gt; := numeric reason code specific to integrations</p> <p>The below example would filter out all events of type 1, and events that have type 2 with a reason of 8:</p> <p><b>eventfilter=1,2-8</b></p>
maxprocesslength=60000	The maximum amount of time the event process thread is allowed to hang before it is terminated.
recordingmatchcolumn=	<p>This value must be the matching value from the script. When scripts match completed surveys to a recording via a match column, this is how the match column is configured. Possible values could include UCID (e.g., <b>user8</b>) or Agent ID (e.g., <b>agent_number</b>).</p> <p>For <b>Avaya SIP</b>, to use the ANI (i.e. the agent's number, not the caller's ANI) to link surveys to calls, <b>device_id</b> is the preferred value.</p>

## Install and Configure cc: Survey

Only use the following settings in a **Cisco TAPI** environment.

[CiscoTapi]	
initialLineMessageDelay=15	Amount of time (in seconds) to delay before processing line messages from TAPI.
lineMonitorFrequency=0	How frequently (in seconds) to run the line monitor job.
lineTimeout=900	Amount of time that passes (in seconds) when we consider a line to have timed out.
probelinefrequency=0	How frequently (in seconds) we probe the line caps to see if we have valid lines.
tapieventtimeout=0	Determines whether or not we hard fail on timeout rather than just resetting TAPI. 0 to disable, 1 to enable.
dumpLinestates=F	Determines whether or not to retain the line states during a line monitor call. T to remove, F to retain.
closedLineCheck=30	How often we check for closed lines (in seconds).
reopenattempt=0	How often we allow between line re-open attempts (in seconds).
alertonlineopenfailure=F	Alerts when there is a failure to open a line. T to alert, F to ignore.
lineopendelay=0	Delay after opening a line (in seconds).

## Enable Survey Score Column in Call Lists

This task can be performed by an administrator or each user.

1. Log into cc: Discover.
2. Go to Web Player tab > Call Lists.
3. Click **Settings** in the upper-right corner.
4. Under **Other Columns**, select the box for **Survey Score**.
5. Click **Save**.

# Survey Administration

## Manage DNIS Values

A DNIS is a unique identifier that the phone system (PBX) sends to the survey application. The DNIS allows specific surveys to be associated with specific dialed numbers (DNIS). Using this methodology one survey engine can support an infinite number of unique surveys, each playing their own messages and asking for their own responses.

### Add/Edit/Delete Values

Follow these steps to add DNIS values:

1. Log into the cc: Discover Web Portal and click Administration > Add-Ons > Surveys > DNIS List.
2. Click **Add**.
3. Enter a DNIS value and Comment value. The comment can be a client name or some explanation of how the DNIS will be used in the survey work.
4. Click the floppy disk icon to save the record.

Values can be edited or deleted by clicking the pencil and red X icons.

### Import Multiple Values

Multiple DNIS values can be added at one time using a CSV file. For example, all the DNIS values used by your phones can be entered. This action avoids the repetitive work of entering values each time one or more is needed for a survey. Surveys are not applied to calls received through a DNIS until that DNIS is assigned to a survey form.

Entries in the CSV file must fit this format: DNIS, Comment. Each entry should be on a separate line. A CSV can also be created in an Excel spreadsheet. Some telephony equipment will export DNIS data as a file.

After creating the CSV file, follow these steps to import the DNIS values:

1. Log into the cc: Discover Web Portal and click Administration > Add-Ons > Surveys > DNIS List.
2. Click **Import**.
3. Browse to the location of the CSV file. Select it and click **OK**.
4. If the first row in the CSV file is NOT a header (i.e., it is a DNIS/Comment value), clear the File contains a header row option.
5. Click **Upload File**. Review the records that are ready for importing. If any of the records are not correct, click **Cancel**. Edit the file and repeat the import. Otherwise, go to the next step.
6. If the records are correct, click **Import**. The DNIS values appear as records in the list.

## Specify Survey Audio Directory Settings

cc: Survey requires these two directories:

- Audio Prompt Upload Directory – This is where messages and prompts are stored on the server's hard drive.
- Audio Recording Directory – This is the location on the server's hard drive array where customer feedback recordings are stored.

Follow these steps to specify the directories:

1. Create the directories in the file system. cc: Discover does not require that they be specific names. Example: c:\SurveyPrompts.
2. Log into the cc: Discover Web Portal and click Administration > Add-Ons > Surveys > Survey Settings.
3. Enter full path names for both directories.
4. Set the Survey Audio Format for output, based on the type of surveys (T1 or SIP).
5. Click **Save**. The settings will be saved if the directory paths are correct, the directories exist, and the application has Create/Write permission for both directories.

## Manage Surveys

Survey Forms Listing									
Import Filter By Status: All									
	Name	Status	DNIS	Attempted Count	Created By	Created On	Last Modified By	Last Modified On	
<a href="#">Edit</a>	FridaySurvey	<input checked="" type="checkbox"/> Active		0	Administrator Administrator	10/5/2012 10:51:18 AM	Administrator Administrator	10/5/2012 10:59:51 AM	
<a href="#">Edit</a>	surveyFor5090	<input type="checkbox"/> Disabled		500	Administrator Administrator	5/9/2012 4:56:26 PM	Administrator Administrator	2/15/2013 5:18:07 PM	
<a href="#">Edit</a>	SurveyFormToDelete	<input checked="" type="checkbox"/> Active	1005,1008	0	Administrator Administrator	9/5/2013 1:26:06 PM	Administrator Administrator	9/5/2013 1:26:46 PM	
<a href="#">Edit</a>	SurveyFormToEdit	<input checked="" type="checkbox"/> Active	1004	0	Administrator Administrator	9/5/2013 1:10:44 PM	Administrator Administrator	9/5/2013 1:24:19 PM	
<a href="#">Edit</a>	Surveyfortoday	In Progress		0	Administrator Administrator	9/18/2012 12:15:50 PM	Administrator Administrator	9/18/2012 12:17:23 PM	
<a href="#">Edit</a>	testAudioFormatsjkt;lkj	<input checked="" type="checkbox"/> Active	1003	0	Administrator Administrator	2/15/2013 3:10:58 PM	Administrator Administrator	2/15/2013 5:18:28 PM	

Pages : 1 of 1 Go To Page : 1 of 1 Go

Click on the **Surveys** tab in the cc: Discover Web Portal. This tab will only be available if you have been assigned at least one of the survey-related permissions. For more information about permissions, see the "Permissions Definitions" section in the *cc: Discover Administration Manual*.

If you have permission to edit surveys, **Manage Surveys** will be available. Clicking this selection will display a list of surveys in your system, as shown above, and enables you to do the following tasks.

- The default view shows all active surveys in the system. You can alter this view by using the **Filter by Status** drop-down. The choices available are All, Active, Disabled, and In Progress.
- To edit the survey delivery information or survey form content, click the **Edit** button to the left of the survey name. This will launch the **Survey Editor**. For details, see [Create A Survey](#).
- To quickly change the status of a survey from Disabled to Active (or vice versa), click the checkbox in the Status column. Survey status can also be changed in the Survey Editor.
- The **Attempted Count** value indicates the number of respondents who have started the survey form.
- The Import button can be used to load XML files and use them as Survey Forms. The files must be formatted exactly as those created using the Form Editor. Custom forms are not supported.

## Create A Survey

Click on the **Surveys** tab in the cc: Discover Web Portal. This tab will only be available if you have been assigned at least one of the survey-related permissions. For more information on permissions, see the "Permissions Definitions" section in the *cc: Discover Administration Manual*.

**Create Survey** will be available if you have permission to edit surveys. CallCopy recommends creating survey questions, responses, and actions on paper before trying to create the form. When you are ready to build your survey in the cc: Discover system, follow these steps:

1. Log into the cc: Discover Web Portal and click the **Surveys** tab.
2. Click **Create Survey** in the left navigation menu. The **Survey Editor** will appear.
3. Enter a **Survey Name**. This name appears in reports. Best practice is to create form names that are unique and descriptive of the survey. You may also wish to include a version number.
4. Enter a **Description** if desired.
5. Enter the **Min Percentage Threshold** and **Max Percentage Threshold**. Any survey whose score is below the minimum percentage is defined as "Negative." Any survey whose score is above the maximum percentage is defined as "Positive." Any score between the minimum and maximum thresholds is reported as "Neutral." These values appear on the Survey Summary and Survey Overview Reports.
6. Select a **Recording Format**. The Survey module supports questions that allow the customer to record a verbal answer. This item allows you to select the file format for these recordings. The only supported format is GSM, which is a highly compressed WAV format.

**Note** For more information on the storage location for these recordings, see [Specify Survey Audio Directory Settings](#). A new folder is automatically created for each survey. Folders are numbered according to the number of survey forms created (i.e., the tenth survey is placed in a folder numbered '10').

7. In the **Available DNIS** field, select the number(s) from which calls will be directed to this survey. You can select multiple consecutive numbers by shift-clicking, or multiple non-consecutive numbers by CTRL-clicking. Click  to move the number to the **Attached DNIS** field. Similarly, you can click  to remove numbers from the **Attached DNIS** field.

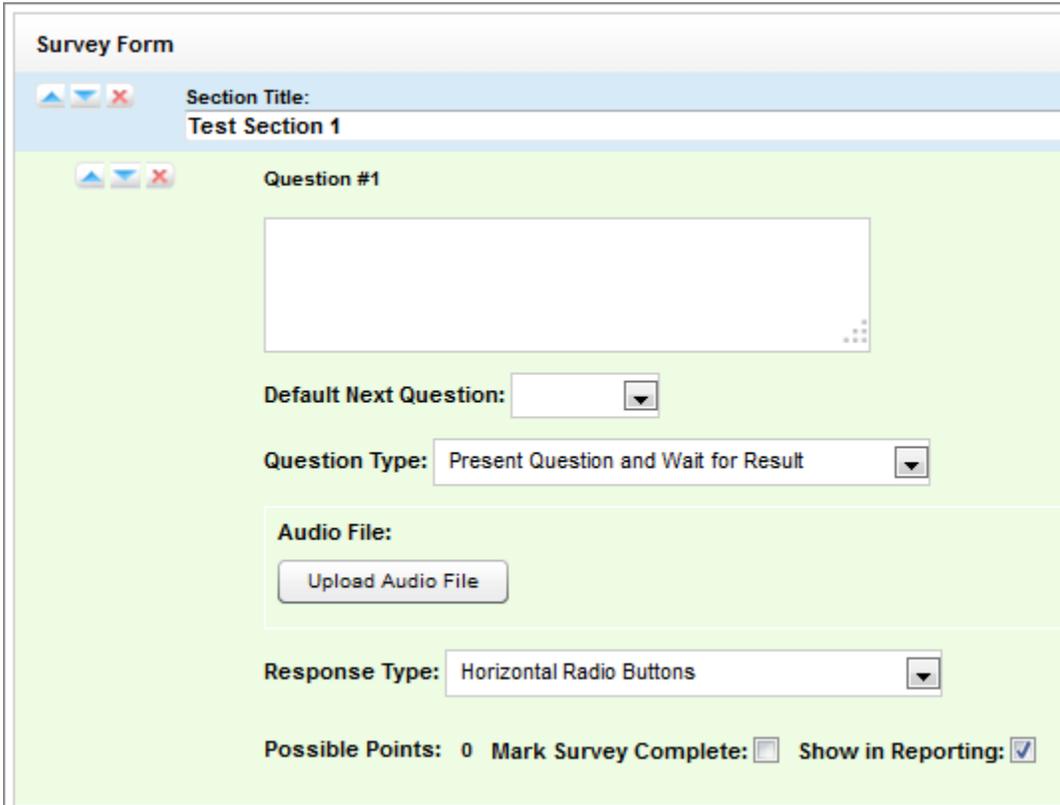
Survey content is organized by section, question and response. A survey must have at least one section, and all questions can be placed in that section. Using multiple sections can help you organize longer surveys.

## Add A Section

To create or add a section in the **Survey Editor**:

1. Click **Add New Section**.
2. Enter a section title.

Use the  buttons to move sections and questions up or down or to delete them.



The screenshot shows the 'Survey Form' editor. At the top, there are navigation buttons (up, down, delete) and a 'Section Title' field containing 'Test Section 1'. Below this is a question titled 'Question #1' with a large text input area. Underneath the text area are several configuration options: 'Default Next Question' (a dropdown menu), 'Question Type' (a dropdown menu set to 'Present Question and Wait for Result'), 'Audio File' (with an 'Upload Audio File' button), 'Response Type' (a dropdown menu set to 'Horizontal Radio Buttons'), and 'Possible Points' (set to 0). At the bottom, there are checkboxes for 'Mark Survey Complete' (unchecked) and 'Show in Reporting' (checked).

## Add A Question

Follow these steps to create a question:

1. Click **Add New Question**.
2. Enter the text of the question in the text box. Your entry should correspond to the language within the question's recorded audio file for consistency and future troubleshooting.
3. **Default Next Question** allows you to specify the next question that will be presented in the survey.
4. Select a **Question Type**. For additional information about question types and corresponding response options, see [Question Types](#).

5. Click **Upload Audio File** and navigate to the file with the question. This is the location of the recording audio file stored on the survey application survey's hard drive structure. These files can be copied to the server location manually if you have access to the server's drive array. The supported formats are:

- WAV container encoded in GSM, u-Law or PCM16
- VOX 8k/6k
- AU container encoded in u-Law
- CSA mono/stereo

During upload to the site, they will be converted to one of the following formats:

Survey Type	T1-Based	SIP-Based
Bit rate	128kbps	64kbps
Audio sample size	16-bit (Linear)	8-bit
Channels	1 (mono)	1 (mono)
Audio sample rate	8kHz	8kHz (G.711)
Audio format	PCM	CCITT u-Law

6. **Response Type** is not used by audio-based surveys. This is reserved for future use within web browser-based surveys.
7. (Optional) Select the **Mark Survey Complete** option. You can require certain questions to be responded to in order for the data to be presented within reporting. For example, if you have a 5 question survey, and completing Question 4 marks the survey as "complete," the customer could hang up and not complete Question 5, yet the survey would still display the data within reporting. Question 5 would be scored as 0 out of the possible points for Question 5, in this example. Any survey not reaching Question 4 would be marked as "incomplete."
8. (Optional) Clear the **Show-in-Reporting** option. Use this option if you do not want this question included within the reporting values. Since the system considers greetings, closings, or transitions without responses to be "questions", it might be appropriate to uncheck this box for these items. Otherwise, this question will display with no data responses.

**Note Possible Points** is auto-calculated based on the highest response defined on the list of responses to questions of the type **Present Question and Wait for Result**.

9. Select from the buttons at the top of the Survey Editor:
- **Export** to export the survey form as an XML file.
  - **Delete** to remove in-progress forms while you're working on them. Do NOT delete forms that have been used; disable them using the **Form Manager** instead.
  - **Save Draft:** saves your form and lists it as "In-Progress" in the **Form Manager**.
  - **Save:** saves and closes the form, after which it will appear in the **Form Manager**.

**Note cc:** Survey auto-saves the form while you work with it. The Save Draft and Save options identify any missing required field data.

## Question Types

Question Type	Used To:	Response Values
<b>Present Question and Wait for Result</b>	<ol style="list-style-type: none"> <li>1. Convey greeting, closing, instructions or other information, and automatically advance after a wait period (defined at the time of installation in the cc_surveyivrFX.ini file)</li> <li>2. Present a question and wait for touch-tone input</li> </ol>	<ol style="list-style-type: none"> <li>1. <b>Response Text:</b> enter the text of the response</li> <li>2. <b>Point Value</b> (optional)</li> <li>3. <b>DTMF:</b> touch-tone input value for response (e.g. 1 for Yes, 2 for No, etc.); each response must have a unique DTMF value</li> <li>4. <b>Next Question:</b> allows you to direct the survey based on response (e.g. Yes leads to Question 3, No to Question 4)</li> </ol>
<b>Collect Customer Information</b>	<p>Allow the customer to leave detailed feedback in the form of a recording. Recording length is bound only by available disk space. Recording continues until customer disconnects or presses "#" as instructed in your question audio file. Voice recordings are playable from within reports, and/or can be accessed from the Audio Recording Directory.</p>	
<b>Collect Digits</b>	<p>Allow the customer to leave a string of numeric values (e.g. transaction number, customer ID) using his/her touch-tone keypad. Survey advances when the caller presses "#" as instructed in your question audio file, or after the wait period (defined at time of installation in the cc_surveyivrFX.ini file)</p>	
<b>End Survey</b>	<p>Convey closing message. Call automatically disconnects after execution of this audio file.</p>	
<b>Threshold Branch</b>	<p>Direct respondents to specific questions based on cumulative score of earlier responses. Requires no audio file. Transparent to caller. Typically not appropriate for the <b>Mark Survey Complete</b> option. An example of this type of question and the associated logic is shown below.</p>	<ol style="list-style-type: none"> <li>1. <b>Negative Percentage Threshold:</b> surveys with current percentage below this value are negative (current accumulated points/current total possible points)</li> <li>2. <b>Positive Percentage Threshold:</b> surveys with current percentage above this value are positive (current accumulated points/current total possible points)</li> <li>3. <b>Negative Next Question:</b> next question for surveys at negative threshold</li> <li>4. <b>Neutral Next Question:</b> next question for surveys between thresholds</li> <li>5. <b>Positive Next Question:</b> next question for surveys at positive threshold</li> </ol>

## Threshold Branch Example

In this example, the survey is designed so that, if the technician's technical skills were not satisfactory, the caller is asked to leave verbal feedback and the survey ends immediately thereafter (see first screenshot). If the technician's technical skills were satisfactory, the caller is presented with another question prior to the survey's conclusion (see second screenshot).

Technical Skills		Score: 0 of 5 (0%)
Were you comfortable with your technician's knowledge of the application? Press 1 for yes. Press 2 for no.		
Digits Collected: 2		
Yes	<input type="checkbox"/>	
No	<input checked="" type="checkbox"/>	0pts
Allow verbal feedback if dissatisfied with technical knowledge.		
Digits Collected: 2		
<input type="checkbox"/>		
We're sorry that your experience with our technical support was less than satisfactory. At the tone, please record a detailed voice message regarding how we could have done better. Press the pound or number sign to stop recording.		
<input type="checkbox"/>		
<a href="#">1-110934.wav</a>		
Was your issue resolved within a satisfactory period of time? Press 1 for yes. Press 2 for no.		
Yes	<input type="checkbox"/>	
No	<input type="checkbox"/>	

Negative answer; caller asked to leave verbal comments. Final question is not presented.

Technical Skills		Score: 10 of 10 (100%)
Were you comfortable with your technician's knowledge of the application? Press 1 for yes. Press 2 for no.		
Digits Collected: 1		
Yes	<input checked="" type="checkbox"/>	5pts
No	<input type="checkbox"/>	
Allow verbal feedback if dissatisfied with technical knowledge.		
Digits Collected: 1		
<input type="checkbox"/>		
We're sorry that your experience with our technical support was less than satisfactory. At the tone, please record a detailed voice message regarding how we could have done better. Press the pound or number sign to stop recording.		
<input type="checkbox"/>		
Was your issue resolved within a satisfactory period of time? Press 1 for yes. Press 2 for no.		
Digits Collected: 1		
Yes	<input checked="" type="checkbox"/>	5pts
No	<input type="checkbox"/>	
Conclusion		Score: 0 of 0 (N/A)
Thank you for participating in our Post-Support Survey. We appreciate your feedback.		
<input type="checkbox"/>		

Positive Answer leads to presentation of additional question

## Search Attempted Surveys (Form Search)

Search Attempted Surveys
Search

Survey: All

Record ID:

IP Address:

Start Date: 11/25/2013

DNIS:

Agent Name:

End Date: 11/25/2013

ANI:

**No Surveys Found Matching Criteria**

Pages :

Go To Page :  of 1

Click on the **Surveys** tab in the cc: Discover Web Portal. This tab will only be available if you have been assigned at least one of the survey-related permissions. For more information about permissions, see the "Permissions Definitions" section in the *cc: Discover Administration Manual*.

If you have permission to view surveys, **Form Search** will be available. Clicking this selection will allow you to search for surveys which have been offered and wholly or partially completed. You can refine your search based on one or more of the following:

- **Survey:** This is the name of the survey.
- **Start Date:** Click on the calendar icon to set the start date for your search period.
- **End Date:** Click on the calendar icon to set the end date for your search period.
- **Record ID:** Each attempted survey is assigned a unique identification number by the system. If you know this number, you can search for a specific survey by entering that ID number here.
- **DNIS:** In the **DNIS** field, enter the number(s) attached to the survey.
- **ANI:** To limit your search to surveys delivered to a specific caller, enter the ANI (CallerID) information here. Availability of ANI information is dependent on your telephony system. If the caller is manually transferred to the survey by an agent, the ANI may not reflect the original CallerID.
- **IP Address:** This field is reserved for future functionality.
- **Agent Name:** To limit your search to surveys associated with a specific agent, enter the agent's name here.

# Reports

cc: Survey reports are accessed through the **Reporting** tab of the cc: Discover Web Portal. Ad hoc reports can also be created for cc: Survey from this tab. The **Reporting** tab will only be available if you have been assigned at least one of the reporting-related permissions. Ad hoc reporting requires its own separate permission. For more information on permissions, see the "Permissions Definitions" section in the *cc: Discover Administration Manual*. For more information on ad hoc reports, see the *cc: Discover Reporting Manual*.

On the **Reporting** tab, click **Printable Reports** and then click **Survey Reporting** in the left navigation menu.

Report	Description	Date Created
Survey Detail	Detailed breakdown of survey responses.	10/22/2013
Survey Detail Summary	Detail Summary of Survey Activity	10/22/2013
Survey Overview	Summary of all survey activity during a date range.	10/22/2013
Survey Summary	Summary of Survey Activity	10/22/2013
Survey Summary by Agent	Survey Summary By Agent	10/22/2013
Survey Summary by Question	Provides a count of each given response to each of the questions in a survey form.	10/22/2013
Survey Summary by Response	Provides a count of each given response to each of the questions in a survey form given that one question has been provided with a particular response. This allows you to see how different segments of the surveyed population have answered questions.	10/22/2013

The **Survey Reporting** page lists the types of reports that can be created. The **Date Created** column shows the date that the template for the report type was created in the system.

## Reporting Criteria

You can use these criteria to specify the data included in a report. The criteria available vary by report.

- Start/End Date – Searched calls will have occurred during this date range.
- Agent – One or all agents can be selected.
- Record ID – This is the survey database record ID.
- Surveys/Form ID – One, multiple, or all survey forms can be selected.
- Survey Complete – Surveys are either Complete or Incomplete based on whether the respondent reached a question that had the Mark Survey Complete option selected.
- ANI – This is the respondent's telephone number.

**Note** If the respondent was manually redirected to the survey by an agent, this number may not be accurate, depending on telephony equipment.)

- DNIS – This is the number associated with the survey.

## Survey Detail

This report shows one or more survey taker's complete responses.



### Survey Detail

For period beginning 1/27/2011 and ending 9/27/2011

<b>Form:</b>	CallCopy Customer Survey	<b>Record:</b>	53190
<b>DNIS:</b>	7533 ANI: 5010 Survey	<b>Date:</b>	4/1/2011 9:38 AM
<b>Survey Complete:</b>	Yes	<b>IP Address:</b>	
<b>Satisfaction</b>		<b>Score: 10 of 10 (100%)</b>	
On a scale of one to five, five being the highest, how satisfied are you with the CallCopy software solution overall?			
Digits Collected: 5			
5		<input checked="" type="checkbox"/>	5pts
4		<input type="checkbox"/>	
3		<input type="checkbox"/>	
2		<input type="checkbox"/>	
1		<input type="checkbox"/>	

If respondents left a voice message for a question, a link to the message file appears in the report.

**Note** IP Address is not used at this time.

<b>Close</b>	<b>Score: 0 of 0 (N/A)</b>
Finally, one last question. If you could have one product enhancement, what would it be?	
	<input type="checkbox"/>
<a href="#">2-101411.wav</a>	

## Survey Detail Summary

This report lists all survey responses that match the search criteria. Click a survey to open the Survey Detail report for that survey. The Recordings column shows the number, if any, of respondent voice recordings.



### Survey Detail Summary

For period beginning Tuesday, May 08, 2012 and ending Friday, June 08, 2012

Selected Surveys: surveyFor5090

Survey Complete: Complete

Name	Date	DNIS	ANI	Score	RecordID	Recordings	Agent Name
surveyFor5090	5/9/2012	1001	1234	46.67%	5	0	agent9_first58 agent9_last58
surveyFor5090	5/9/2012	1001	1234	46.67%	6	0	Clifton Guiran
surveyFor5090	5/9/2012	1001	1234	60.00%	7	0	agent10_first58 agent10_last58
surveyFor5090	5/9/2012	1001	1234	53.33%	8	0	Alan Crow
surveyFor5090	5/9/2012	1001	1234	80.00%	9	0	Myron Galliano
surveyFor5090	5/9/2012	1001	1234	0.00%	10	0	Connie Francis
surveyFor5090	5/9/2012	1001	1234	40.00%	11	0	Connie Francis
surveyFor5090	5/9/2012	1001	1234	60.00%	12	0	agent10_first58 agent10_last58

## Survey Overview

For each survey form in a time period, the report calculates the shown categories. Positive, Negative, and Neutral ranges are defined on the Survey Form specific information. If a survey form does not have any responses, it does not appear on the report.



### Survey Overview

For period beginning Thursday, January 27, 2011 and ending Tuesday, September 27, 2011

Name	Count	Complete	Incomplete	Positive	Negative	Neutral
CallCopy Customer Survey	12	11 (91.7%)	1 (8.3%)	4 (33.3%)	2 (16.7%)	4 (33.3%)

## Survey Summary

For each survey form in a time period, calculates these categories. If a survey form does not have any responses, it does not appear on the report.

- **Score** – Total score of the survey responses and the total maximum possible score of a survey. The maximum possible score on a survey can vary based on the questions that a respondent is asked to answer. For example, one respondent may be asked to answer five questions with a total of 50 points. Another respondent, based on his/her answers, will be directed through seven questions with a total of 70 points. This fact must be considered when designing surveys.
- **Average Percentage (%)** – (Sum of each response’s score)/((Sum of the possible score for each form)/Number of responses)



### Survey Summary

For period beginning Thursday, January 27, 2011 and ending Tuesday, September 27, 2011

Name	Count	Complete	Incomplete	Positive	Negative	Neutral	Score	Avg %
CallCopy Customer Survey	12	11 (91.7%)	1 (8.3%)	4 (33.3%)	2 (16.7%)	4 (33.3%)	76 of 90	80.8%

## Survey Summary by Agent

This report allows you to select a set of agents over a specific date range, and displays the number of surveys completed for each agent, given survey score, total possible points, percentage overall score, and totals for each column.

The Report Type option determines how results are broken down and displayed:

- Agent – Lists total scores for all forms by agent as shown below.
- Form – For each agent, shows scores by form and the total scores for all forms.
- Section – Shows scores for each section on the form.
- Question – Shows scores for each question in each section on each form.



### Survey Summary by Agent

For Saturday, January 01, 2011 to Wednesday, August 08, 2012

Selected Agents: Orlando de Boer, Matt Borghetti, Jenny Boucler, Joe Brechin, Anders Brooker, Keith Burke, James Busker, Stian Byrd, Jeremy Carrozza, Dimitri Carstensen, Renato Chassagne, Boozoo Chavis, Roy Chenier, Lemony Cicierega, Anthony Condon, Jean-Pierre Conlee, Sheryl Coscia, Gianni Croissonier, Alan Crow, Richard Cunningham, Pietro Cutting, Rolf Deiro, Wolfgang DiGirolamo, Kevin Dimetrik, Gary Doktorski, Stuart Dwyer



Agent	# Surveys	Score	Possible	Percentage
Joe Brechin	2	4	5	80%
Stian Byrd	4	7	15	46%
Alan Crow	12	25	40	62%
Pietro Cutting	4	11	15	73%
<b>Total:</b>	<b>22</b>	<b>47</b>	<b>75</b>	<b>63%</b>

## Survey Summary by Question

This report provides a count of each given response to each of the questions in a survey form. Users can select a date range, the survey form to evaluate, DNIS/ANI numbers, and whether the survey completion status. The generated report displays how many of the chosen survey have been completed, average score, then counts and score percentages of each question in the form. The Survey field is required.

Start Date:  End Date:  Survey:  DNIS:  ANI:  Survey Complete:



### Survey Summary by Question

For period beginning Thursday, January 01, 2009 and ending Wednesday, August 08, 2012

Selected Form: surveyFor5090

Survey	Number of Surveys	Average Score	
surveyFor5090	0	0 of 0 (N/A)	
Question	Response	Count	Percentage
Q1 On a scale of 1 to 5 - 5 is the best			
1		0	0.0%
2		0	0.0%
3		0	0.0%
4		0	0.0%
5		0	0.0%
Q2 On a scale of 1 to 5 - 5 is the best			
1		0	0.0%
2		0	0.0%
3		0	0.0%
4		0	0.0%
5		0	0.0%
Q3 On a scale of 1 to 5 - 5 is the best			
1		0	0.0%
2		0	0.0%
3		0	0.0%
4		0	0.0%
5		0	0.0%
Thank you for your time			

## Survey Summary by Response

This report allows users to identify the relationship between a response to one question and the responses to other questions. This allows you to see how different segments of the surveyed population have answered questions. For this report, one question can address a respondent's overall opinion of a product or service. Follow-up questions elicit the reasons or factors that cause that overall opinion.

Example: Car Satisfaction Survey – Customers who purchased any new car within the last year are surveyed. One question asked them to rate their overall satisfaction with their car on a scale of 1 to 5, with 5 being the highest satisfaction. Additional questions ask how many times they have taken the car for repairs, the price of the car, the size of the car, the car's miles-per-gallon rate, and whether the car was the customer's first choice. Assume that these are the results:

Report 1: Question 1: Satisfaction rating: 1

- Question 2 -- Number of times cars repaired: 1
- Question 3 – Was this car your first choice?: No

Report 1: Question 1: Satisfaction rating: 5

- Question 2 -- Number of times cars repaired: 1
- Question 3 – Was this car your first choice?: Yes

Given these results, it appears that satisfaction with a car purchase is determined by whether or not the customer was able to purchase their first choice. A customer may have wanted a \$35,000 car but had to settle for a \$20,000 car, which affected the satisfaction rating.

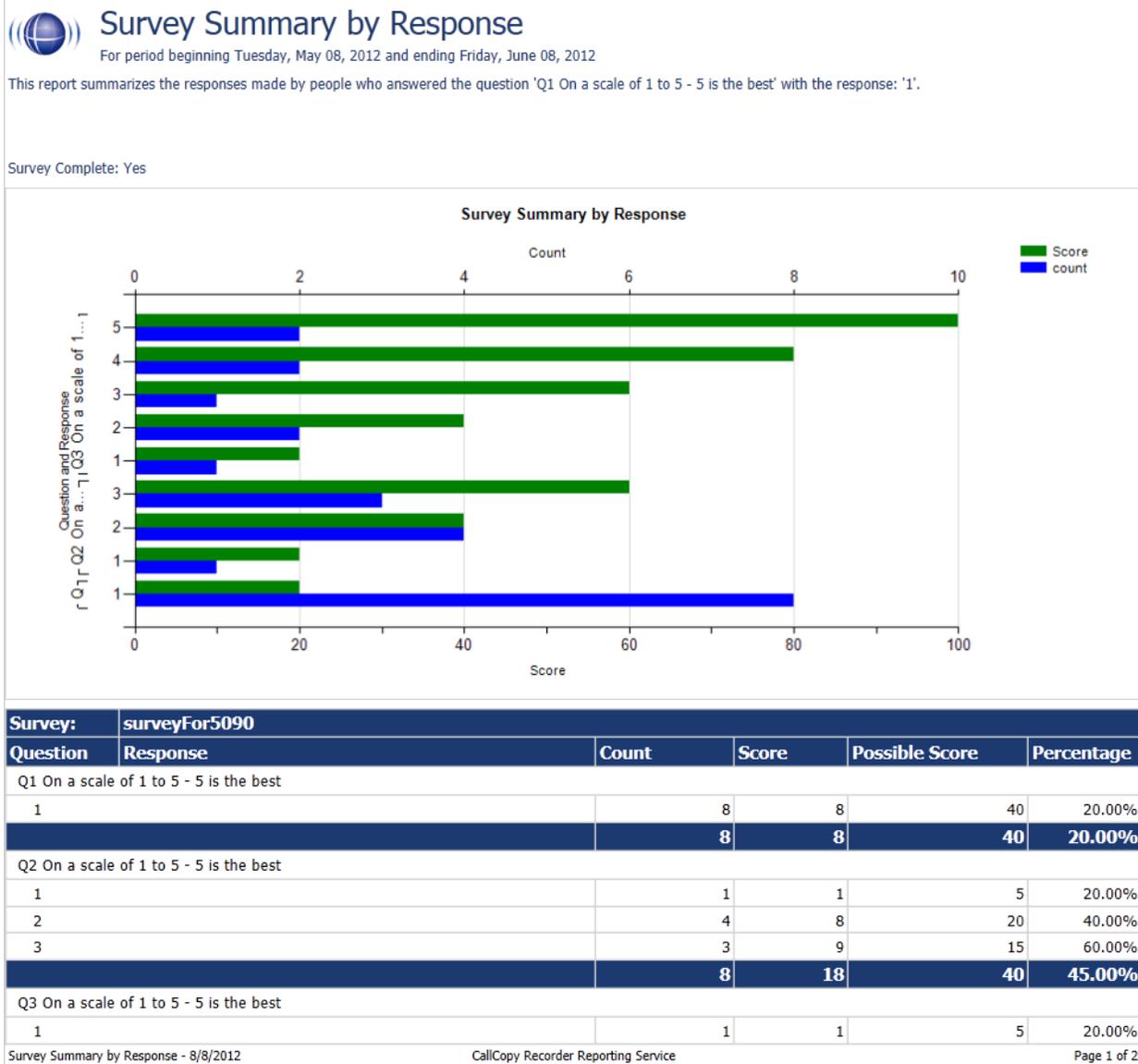
Multiple versions of this report may need to be created in order to identify the relationships between a question's responses and the responses on the other questions. In other words, Question 1 has four possible responses, and that question is used as the overall or control question, then a report should be run for each response.

Survey, Question ID, and Response are required fields. The result fields are

- Count – Number of respondents who selected a response.
- Score – Actual total points for a response. If a response was worth two points and three respondents selected it, the Score would be six.
- Possible Score – Multiplies the number of response options by the point value for a response.
- Percentage –  $\text{Score} / \text{Possible Score}$

## Reports

If no respondents selected a response to a question, the response option does not appear on the report. For example, if no respondents selected response 2 to a question, the report shows numbers for responses 1, 3, 4, and 5.



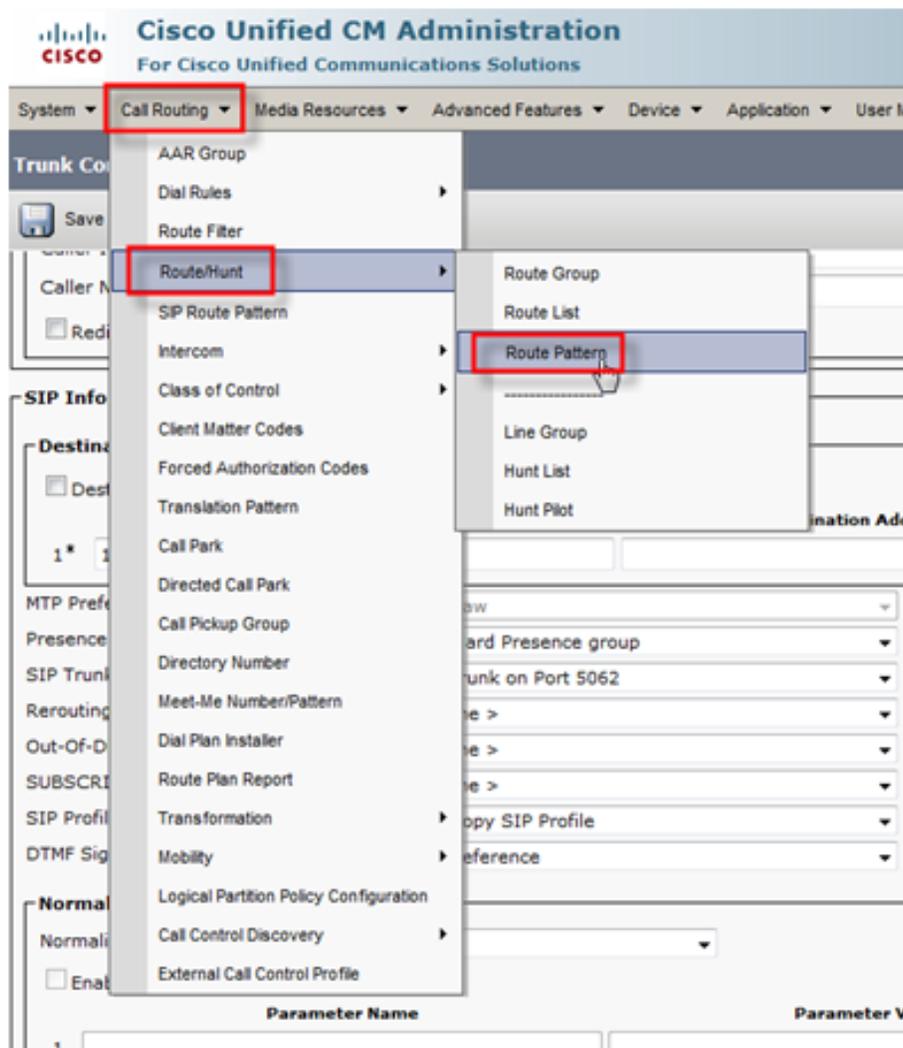
# Example PBX Configurations

This section outlines **example** PBX configurations for T1s and trunk groups. This is not an inclusive list and CallCopy makes no guarantees that these configurations will work in your scenario. Please consult your PBX support or vendor for specific questions regarding your installation.

## Cisco

The following screenshots identify which fields need to be configured for Surveys to function properly. Specific values will vary from one environment to another.

### Set Route Pattern



## Example PBX Configurations

**Status**

 Status: Ready

---

**Pattern Definition**

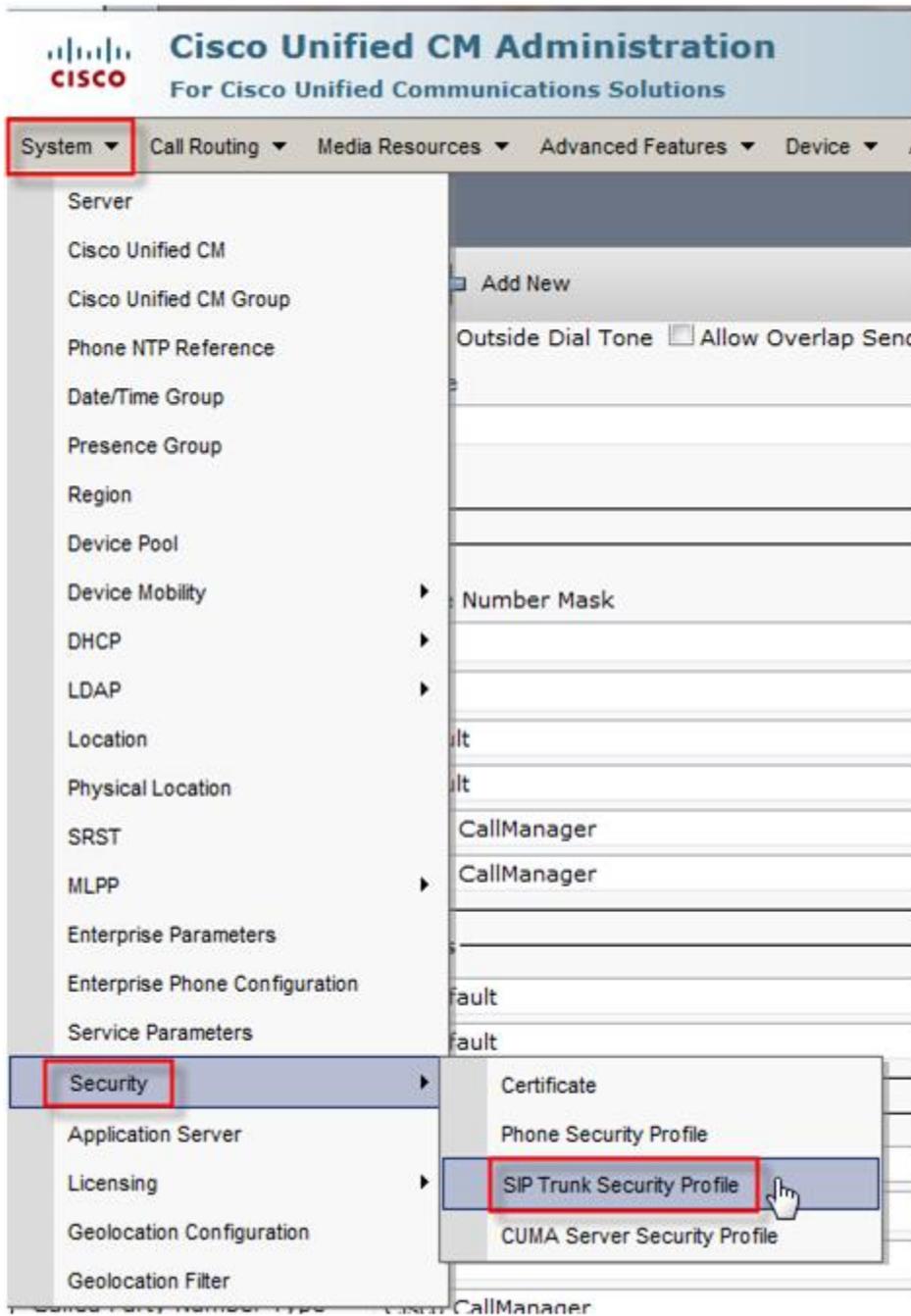
Route Pattern*	93XXXX
Route Partition	< None >
Description	
Numbering Plan	-- Not Selected --
Route Filter	< None >
MLPP Precedence*	Default
Resource Priority Namespace Network Domain	< None >
Route Class*	Default
Gateway/Route List*	CCSurveyTest <a href="#">(Edit)</a>
Route Option	<input checked="" type="radio"/> Route this pattern <input type="radio"/> Block this pattern No Error
Call Classification*	OffNet

Allow Device Override  Provide Outside Dial Tone  Allow Overlap Sending  Urgent Priority

**Called Party Transformations**

Discard Digits	< None >
Called Party Transform Mask	XXXX
Prefix Digits (Outgoing Calls)	93
Called Party Number Type*	Cisco CallManager
Called Party Numbering Plan*	Cisco CallManager

## Set SIP Trunk Security Profile



**Status**

 Status: Ready

---

**SIP Trunk Security Profile Information**

Name\*

Description

Device Security Mode

Incoming Transport Type\*

Outgoing Transport Type

Enable Digest Authentication

Nonce Validity Time (mins)\*

X.509 Subject Name

Incoming Port\*

Enable Application Level Authorization

Accept Presence Subscription

Accept Out-of-Dialog REFER\*\*

Accept Unsolicited Notification

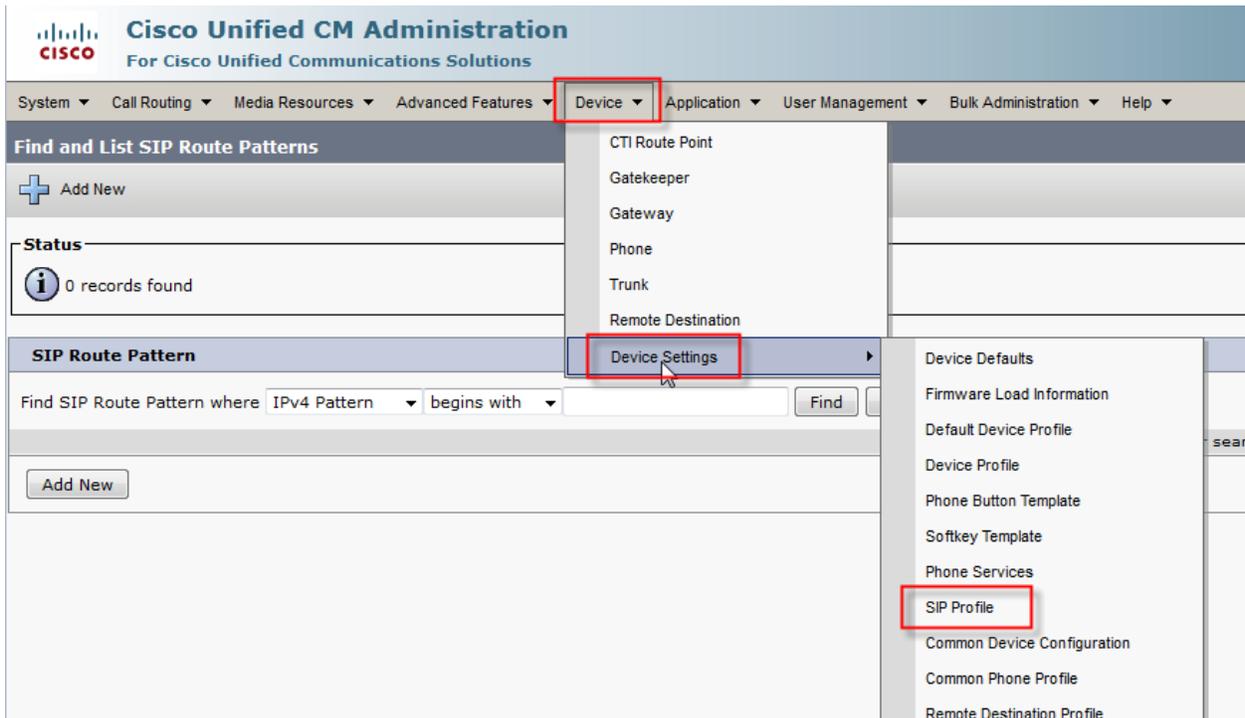
Accept Replaces Header

Transmit Security Status

 \*- indicates required item.

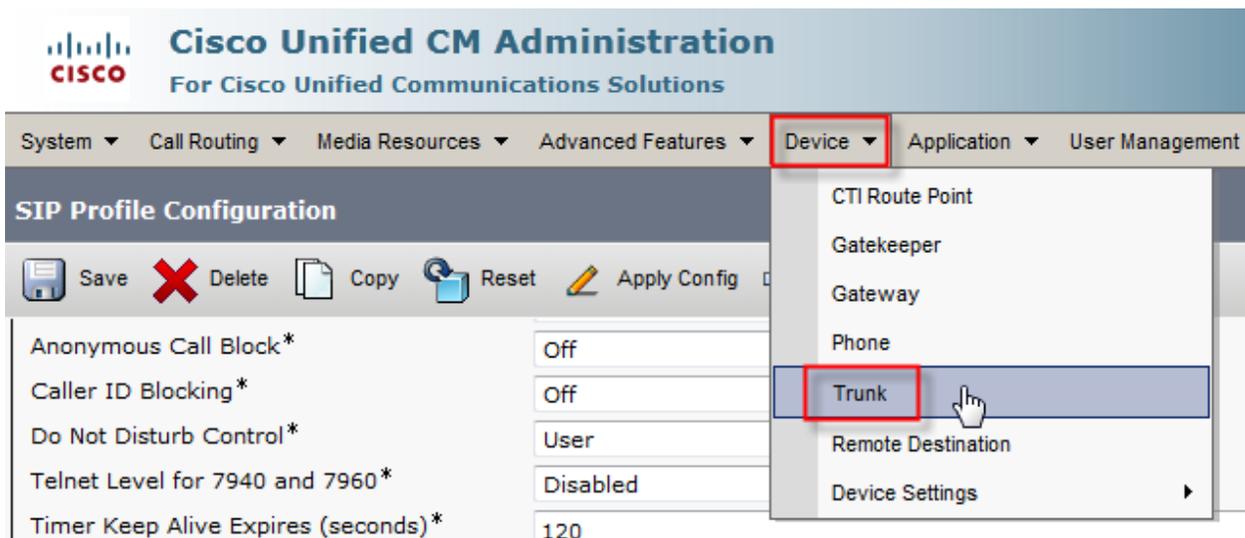
 \*\*If this profile is associated with an EMCC SIP trunk, Accept Out-of-Dialog REFER is enabled regardless of the

## Configure SIP Profile



Please refer to your Cisco documentation for information on configuring this section.

## Configure Trunk



## Example PBX Configurations

**SIP Information**

**Destination**

Destination Address is an SRV

**Destination Address** 1\* 10.100.10.55 **Destination Address IPv6** **Destination Port** 5062

MTP Preferred Originating Codec\* 711ulaw

Presence Group\* Standard Presence group

SIP Trunk Security Profile\* Sip Trunk on Port 5062

Rerouting Calling Search Space < None >

Out-Of-Dialog Refer Calling Search Space < None >

SUBSCRIBE Calling Search Space < None >

SIP Profile\* CallCopy SIP Profile

DTMF Signaling Method\* No Preference

## Avaya SIP

### Create Node

Create a node with a unique name and the IP of the system running cc: Survey.

```
change node-names ip Page 2 of 2
IP NODE NAMES
Name IP Address
gavm 10.100.10.55
( 16 of 19 administered node-names were displayed )
Use 'list node-names' command to see all the administered node-names
Use 'change node-names ip xxx' to change a node-name 'xxx' or add a node-name
```

F1 Cancel F2 Refresh F3 Enter F4 Clear F5 Help F6 Edit F7 Next F8 Prev

## Create Signaling Group

**Transport Method:** TCP

**Near-end Node Name:** procr

**Far-end Node Name:** The name of the node created in the previous step.

Near-end and Far-end Listen Ports should be 5060 by default when the Transport Method is set to TCP. Port 5061 is reserved for encryption, but cc: Survey does not support encryption.

```

change signaling-group 70                                     Page 1 of 1
                                SIGNALING GROUP

Group Number: 70                      Group Type: sip
                                Transport Method: tcp
IMS Enabled? n

Near-end Node Name: procr                Far-end Node Name: qavm
Near-end Listen Port: 5060              Far-end Listen Port: 5060
                                Far-end Network Region: 1
Far-end Domain: _____

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

F1 Cancel F2 Refresh F3 Enter F4 Clear F5 Help F6 Edit F7 Next F8 Prev

## Create Trunk Group

**Group Type:** SIP

**TAC:** Select a unique value not already in use.

**Service Type:** Tie

**Number of Members:** Number of individual trunks. This will be determined by the customer's configuration.

```
add trunk-group 70                                     Page 1 of 21
                                     TRUNK GROUP
Group Number: 70                                     Group Type: sip   CDR Reports: y
Group Name: * SIP to qavm                           COR: 1           TN: 1           TAC: 270
Direction: two-way                                   Outgoing Display? n
Dial Access? n                                       Night Service: _____
Queue Length: 0
Service Type: tie                                     Auth Code? n
                                                    Signaling Group: 70
                                                    Number of Members: 10

F1 Cancel  F2 Refresh  F3 Enter  F4 Clear  F5 Help  F6 Edit  F7 Next  F8 Prev
```

## Create Route Pattern

**Group Number:** Trunk group number (see top-left of previous screenshot)

**FRL:** 0

**NPA:** Local area code

change route-pattern 70 Page 1 of 3

Pattern Number: 70 Pattern Name: \* Survey qavm

SCCAN? n Secure SIP? n

Grp No	FRL	NPA	Pfx Mrk	Hop Lmt	Toll List	No. Del	Inserted Digits	DCS/ IXC	Intw
1:	70	0	614	-	-	-	-	n	user
2:	-	-	-	-	-	-	-	n	user
3:	-	-	-	-	-	-	-	n	user
4:	-	-	-	-	-	-	-	n	user
5:	-	-	-	-	-	-	-	n	user
6:	-	-	-	-	-	-	-	n	user

	BCC VALUE					TSC	CA-TSC Request	ITC	BCIE	Service/Feature	PARM	No. Dgts	Numbering Format	LAR Subaddress
	0	1	2	M	4									
1:	y	y	y	y	y	n	n	rest				-		none
2:	y	y	y	y	y	n	n	rest				-		none
3:	y	y	y	y	y	n	n	rest				-		none
4:	y	y	y	y	y	n	n	rest				-		none
5:	y	y	y	y	y	n	n	rest				-		none
6:	y	y	y	y	y	n	n	rest				-		none

F1 Cancel F2 Refresh F3 Enter F4 Clear F5 Help F6 Edit F7 Next F8 Prev



## Disable Mask CPN/Name

Under the Class of Restriction that applies to agents directing callers to surveys, set "Mask CPN/NAME for Internal Calls?" to **N**.

```

change cor 1                                     Page 2 of 23
                                CLASS OF RESTRICTION

                                MF Incoming Call Trace? n
                                Brazil Collect Call Blocking? n
                                Block Transfer Display? n
Block Enhanced Conference/Transfer Displays? y
                                Remote Logout of Agent? n

Station Lock COR: 1          TODSL Release Interval (hours):

                                Station-Button Display of UUI IE Data? n
                                Service Observing by Recording Device? n
                                ERASE 24XX USER DATA UPON
                                Dissociate or unmerge this phone: none
                                EMU login or logoff at this phone: none
                                Mask CPN/NAME for Internal Calls? n
    
```

F1 Cancel   F2 Refresh   F3 Enter   F4 Clear   F5 Help   F6 Edit   F7 Next   F8 Prev

## Nortel

The following are sample configurations from a Nortel Option 11, LD screen 22:

```
CTYP MSDL
DNUM 8
PORT 1
DES CC_SVY
USR PRI
DCHL 19
OTBF 32
PARM RS422 DTE
DRAT 64KC
CLOK EXT
IFC NI2
  ISDN_MCNT 300
CLID OPT0
CO_TYPE STD
SIDE NET
CNEG 1
RLS ID 25
RCAP COLP NDS
T310 120
T200 3
T203 10
N200 3
N201 260
K 7
BSERV NO
```

## About Uptivity

What boosts the bottom line for any company with a contact center? How about getting the best that every agent can deliver from their first day on the job and constantly optimizing contact center management and performance? Only Uptivity gives you the tools you need to continuously improve every aspect of each step of every agent's life cycle and enhance customer satisfaction. You get exactly what you need thanks to a modern, integrated, and easy-to-use suite of tools that offers a unified system for performance management, workforce management, speech analytics, and call recording. Unparalleled customer service and support from our in-house staff combine with a better bundle for a better value, and a lower total cost of ownership.

Headquartered in Columbus, Ohio, and on the Web at [www.uptivity.com](http://www.uptivity.com).