



inContact Survey Customer Guide

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Premises

inContact Survey Customer Guide

- **Version** — 16.1 or later
- **Revision** — February 2017
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Introduction

Audience

This document is written for supervisors, managers and administrators at organizations that use inContact Survey in a premises-based, VoIP/SIP environment. Readers should have a basic level of familiarity with general networking, usage of a PC and its peripherals, the Windows operating system, their telephony environment, inContact WFO, and survey theory.

Goals

The goal of this document is to provide knowledge, reference, and procedural information necessary for you to manage and use inContact Survey.

This document is NOT intended as a specific system or network design document. The guide also does not cover the inContact WFO services and components necessary for recording, PBX integration (such as CTI Core and Voice Boards), quality management, or other inContact WFO components.

Assumptions

This document assumes that you and your inContact Survey team have deployed Survey (and inContact WFO recording if applicable) and confirmed that the software is working correctly.

Need-to-Knows

inContact Survey 16.1 and later is supported for Premises deployments only.

inContact Survey is managed from the inContact WFO Web Portal.

inContact WFO allows administrators to customize field names and terminology in the Web Portal to fit your unique environment. Therefore, screen examples and field names used in this manual may differ from those seen in your implementation.

Tasks described in this manual may be limited by permissions. If you need to perform a task and are unable to do so, see your supervisor or inContact WFO administrator.

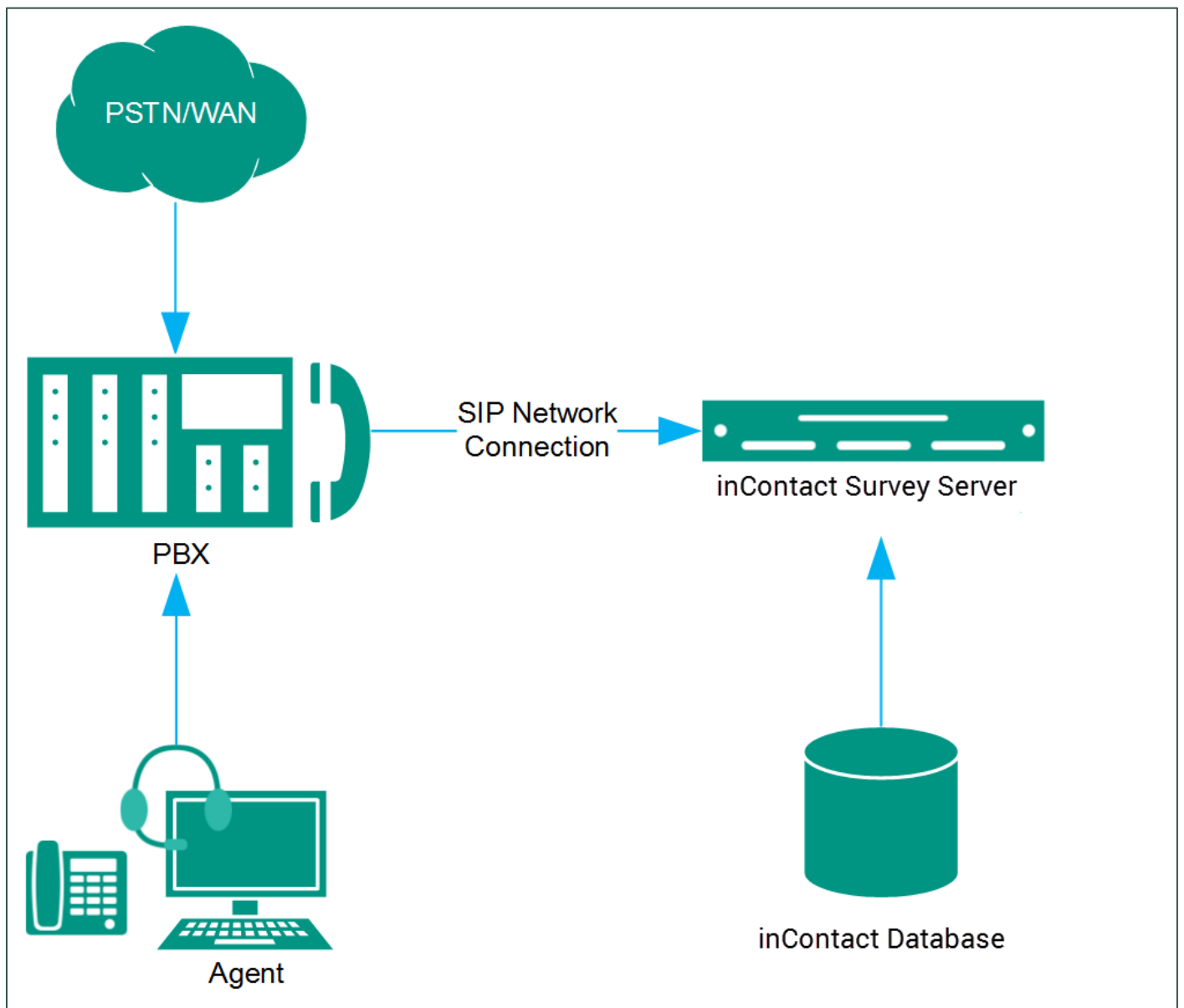
Several inContact WFO features use menus and other windows that may be considered as “pop-ups” by some browsers. inContact recommends that you configure your browser to allow pop-ups for the inContact WFO site.

inContact WFO supports standard Windows methods for selecting multiple items in a list: press and hold the Shift key while clicking to select consecutive items or press and hold the CTRL key while clicking to select non-consecutive items.

In some cases, inContact WFO provides more than one way to accomplish a task or access a feature. The procedures in this manual explain the primary method, but also note the **Alternative** where applicable.

Product Technical Overview

This diagram illustrates the inContact Survey components and interactions. The accompanying table provides additional information about the components.



Component	Function
Callers via PSTN or Agents	Survey can be configured to handle calls two ways: <ul style="list-style-type: none"> • A telephone number can be set up and provided to the public. Callers dial the number, and the PBX directs the call to the survey engine. • Agents can transfer callers to the survey engine via the PBX.
PBX	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. For each call, the PBX can send the survey engine the: <ul style="list-style-type: none"> • DNIS • Caller number or Agent/Extension number as an ANI
inContact Survey Server	The inContact Survey engine executes the survey forms and audio files, records respondent input and call information to the database, and records respondent voice comments to WAV files. The directories for the survey forms, audio prompts, and verbal response files are located on this server in most installations, although this is not a requirement. Survey and inContact WFO can be hosted by the same physical or virtual server, or on separate servers. Survey can also be deployed without inContact WFO.
inContact WFO Web Portal	Survey administrators, system administrators, and managers use the Web Portal to: <ul style="list-style-type: none"> • Create and manage survey forms • Configure and manage the Survey application, settings, and permissions • Review survey results, reports, and respondents' audio responses
inContact Database	Call information and respondent input and responses are recorded in this database as survey records. Reports are generated from these records.

Requirements

PBX

VoIP/SIP-Supported PBXs

inContact Survey requires that calls be directed to the application via a SIP trunk. These PBXs are supported:

- Cisco Unified Communications Manager (UCM) 9.1
- Avaya Communication Manager (CM) 5.2 - 7
- Asterisk 11.5
- ShoreTel ShoreWare 14.1
- Avaya Session Manager 6.x - 7

Earlier versions of these PBX environments may be supported. Consult your inContact WFO Sales Engineer for more information.

Hardware, Software, and Licensing

Hardware and software requirements vary by PBX. Some PBXs require licensing for SIP endpoints. Work with your PBX vendor representative and inContact WFO Sales Engineer to determine licensing needs.

inContact Survey

inContact Survey can be deployed with inContact WFO on the same server, on a separate server, or as a standalone product (in other words, without call recording). Standalone inContact Survey requires installation of the inContact WFO Web Portal. You can find customer site requirements in the online help for inContact WFO (help.incontact.com/wfo/prem/help.htm).

Hardware

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

Software

This software is required:

- inContact Survey 16.1 or later
- inContact WFO 16.1 or later
- Licensing

Contact your inContact WFO representative for licensing information.

Performance Considerations

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, Appendix: PBX Configuration Examples](#), or both.
- 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, whether callers leave audio messages, and so forth.

Beep Tone

In SIP deployments of inContact Survey, the software does not play a beep tone at the end of audio prompt files. Questions should include verbal instructions to indicate when the caller should begin speaking. For example: "...Press the pound sign to end the recording. Begin speaking now."

i inContact Survey for TDM trunks *does* play a beep tone at the end of Collect Customer Information questions and before the caller starts speaking. If you move from TDM to SIP Surveys, you will need to review your existing surveys. Any Collect Customer Information and Collect Digits questions that mention the beep tone will require new audio files that provide verbal instructions. Replacing the audio files assures that the survey forms can continue to be used and that reporting is not affected.

Survey Call Linking

This feature is only supported with:

- Cisco UCM and a SIP trunk (inContact recommends this option rather than TAPI for greater reliability)
- Cisco UCM with TAPI for CTI data and a SIP trunk
- Avaya CM and a SIP trunk

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 inContact WFO servers and Survey is running on only one of those servers.

Survey call linking typically involves matching the ANI (CallerID) of the call recording with the ANI for the completed survey. In some telephony environments and configurations, the ANI in the call recording database table can be four digits, and the ANI in the surveys database table can be one of several different values.

For example, this behavior is known to occur with some Avaya configurations. Avaya Communication Manager's Public Unknown Numbering setting can affect how the survey record ANI appears:

- If the setting is not configured, the ANI shows up as "anonymous" (see Figure 1).
- If the setting is configured without a CPN Prefix, the ANI in the recordings table shows as a four-digit extension number. This is the same way it appears in the recordings table (see Figure 2).
- If the setting is configured with a CPN Prefix, the ANI in the surveys table shows as the prefix plus the four-digit extension number.

Post-Survey Linker

Post-Survey Linker (PSL) is an additional means of linking call records and surveys. Linking is done after the call is recorded and the survey is completed. It can be used if:

- Linking was not performed when the Survey service was first used.
- The Survey service could not complete the linking because the process was interrupted while the survey was being done.
- The call recording record was not written to the inContact WFO database when the survey was completed. The Survey engine has to link the agent to the survey. Survey always adds the agent to the survey record. If the recording is not yet written to the database, the Survey engine cannot link the records.

PSL will attempt to link all surveys in the database that have the required data values. The time for this initial processing depends on the number of surveys in the database. The performance impact is minimal and can be controlled by INI file settings. Once PSL has checked a survey, it will not check the survey again.

PSL should be used as a supplemental, not primary, means of linking. The Survey service uses CTI data that assures most surveys/calls will be linked accurately. That CTI data is not available to the PSL service. The PSL service is also slower than the Survey service. Actual performance is system dependent.

No conflicts will occur if both Survey Call Linking and PSL are run on the same server. PSL does not try to link surveys that are already linked to a recording.

For PSL to work:

- Customers must understand the CTI data their ACD/PBX provides for the call and survey records. Not all CTI integrations provide the necessary data.
- The call recording script must be updated to remove all hyphens from the ANI values.
- PSL does not have to run on the same server as the Survey engine but should for ease of administration.

Talk to your inContact Survey deployment team if you are interested in Post-Survey Linker.

	id	survey_id	survey_date	duration	dnis	ani	ip_address	recording_id	survey_source
524	524	73	2013-12-18 12:43:11.000	12	4202	16145557009		6594	ivr
525	525	74	2013-12-18 12:44:55.000	17	4202	16145557009		6596	ivr
526	526	74	2013-12-18 12:45:27.000	16	4202	16145557009		6597	ivr
527	527	74	2013-12-18 12:45:54.000	17	4202	16145557009		6598	ivr
528	528	75	2014-01-07 11:07:22.670	4	4203	16145557009		6648	ivr
529	529	75	2014-01-07 11:08:52.057	12	4203	16145557009		6650	ivr
530	530	75	2014-02-10 08:57:43.697	16	4203	16145557011		NULL	ivr
531	531	75	2014-02-10 08:59:54.277	51	4203	16145557011		NULL	ivr
532	532	75	2014-02-10 09:03:49.143	14	4203	16145557011		NULL	ivr
533	533	68	2014-03-07 16:09:51.490	29	4201	16145557011		8583	ivr
534	534	68	2014-03-07 16:30:49.467	17	4201	16145557011		NULL	ivr
535	535	68	2014-03-07 16:31:42.467	14	4201	16145557009		NULL	ivr
536	536	68	2014-03-10 15:23:19.100	11	4201	16145557011		NULL	ivr
537	537	68	2014-03-10 15:25:55.887	14	4201	16145557009		NULL	ivr
538	538	68	2014-03-10 15:34:47.310	8	4201	anonymous		NULL	ivr
539	539	68	2014-03-10 15:36:16.253	9	4201	anonymous		NULL	ivr
540	540	68	2014-03-10 15:36:53.540	12	4201	anonymous		NULL	ivr
541	541	68	2014-03-10 15:54:41.747	8	4201	7011		8604	ivr
542	542	68	2014-03-10 15:57:09.557	8	4201	7011		8606	ivr

Figure 1

	ident	recording_time	device_id	filename	recording_type	ani	dnis	user
1...	8585	1394209800	7009	F:\CallCopy\Archive\20140307\7009\7009-16-30-00.csa	S	7009	7011	
1...	8586	1394209800	7011	F:\CallCopy\Archive\20140307\7011\7011-16-30-00.csa	S	7009	7011	
1...	8587	1394209842	7011	F:\CallCopy\Archive\20140307\7011\7011-16-30-42.csa	S	7009	7011	
1...	8588	1394209842	7009	F:\CallCopy\Archive\20140307\7009\7009-16-30-42.csa	S	7009	7011	
1...	8589	1394209895	7009	F:\CallCopy\Archive\20140307\7009\7009-16-31-35.csa	S	7011	7009	
1...	8590	1394209895	7011	F:\CallCopy\Archive\20140307\7011\7011-16-31-35.csa	S	7011	7009	
1...	8591	1394464909	7011	F:\CallCopy\Recordings\TSAPI\20140310\7011\7011-...	S	7009	7011	
1...	8592	1394464909	7009	F:\CallCopy\Recordings\TSAPI\20140310\7009\7009-...	S	7009	7011	
1...	8593	1394464981	7011	F:\CallCopy\Recordings\TSAPI\20140310\7011\7011-...	S	7009	7011	
1...	8594	1394464981	7009	F:\CallCopy\Recordings\TSAPI\20140310\7009\7009-...	S	7009	7011	
1...	8595	1394465150	7009	F:\CallCopy\Recordings\TSAPI\20140310\7009\7009-...	S	6145555003	7009	
1...	8596	1394465600	7009	F:\CallCopy\Recordings\TSAPI\20140310\7009\7009-...	S	6145555003	7009	
1...	8597	1394465650	7011	F:\CallCopy\Recordings\TSAPI\20140310\7011\7011-...	S	7009	7011	
1...	8598	1394465650	7009	F:\CallCopy\Recordings\TSAPI\20140310\7009\7009-...	S	7009	7011	
1...	8599	1394465678	7011	F:\CallCopy\Recordings\TSAPI\20140310\7011\7011-...	S	7009	7011	
1...	8600	1394465678	7009	F:\CallCopy\Recordings\TSAPI\20140310\7009\7009-...	S	7009	7011	
1...	8601	1394465773	7009	F:\CallCopy\Recordings\TSAPI\20140310\7009\7009-...	S	7011	7009	
1...	8602	1394465773	7011	F:\CallCopy\Recordings\TSAPI\20140310\7011\7011-...	S	7011	7009	
1...	8603	1394465807	7009	F:\CallCopy\Recordings\TSAPI\20140310\7009\7009-...	S	6145555003	7009	
1...	8604	1394466878	7011	F:\CallCopy\Recordings\TSAPI\20140310\7011\7011-...	S	7009	7011	
1...	8605	1394466878	7009	F:\CallCopy\Recordings\TSAPI\20140310\7009\7009-...	S	7009	7011	

Figure 2

Differences in ANI formatting can affect both standard call-survey linking and the post-survey call-survey linking.

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 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

i Some of the Customer Guides to inContact WFO call recording integrations 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 (that is, 1-800 calls from customers) and forwarded calls to the Survey engine.
- A dial plan to pass the DNIS and the ANI (that is, the originating caller or the transferring agent's PBX number, either the agent or the extension) to the Survey engine.

Configure Vectors

For most PBX types, vectors are used to direct calls. Vector programming requirements for inContact Survey will differ depending on whether the agent transfers the caller to the survey or the caller is automatically transferred when the agent disconnects the call.

If callers are automatically transferred to the survey when the agent disconnects, the vector programming should include a variable to count transfers and cause the call to disconnect after the survey ends. Otherwise, a looping scenario can occur in which the call is redirected to the ACD, which then redirects it to the survey, causing a new survey to begin.

For an example of vector programming in an Avaya environment, see [Program Vectors for Automatic Transfer](#).

Configure inContact Survey

Permissions

You must be granted permissions to work with surveys. If you need to work with inContact Survey and are unable to do so, consult your inContact WFO application administrator.

i Group permissions are not enforced by Survey. A user who has access to Survey reports can see survey results for any agent.

The following components need Windows-level permissions:

- **IIS account running inContact WFO Web Portal:** Read/Write permissions to the Audio Prompt Upload Directory and the Audio Recording Directory. If Survey is installed on a **separate server** from the 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 inContact Survey installation wizard establishes the needed permissions for the database and other inContact WFO modules.

Auditing

inContact Survey relies on inContact WFO's auditing function. No specific Survey-related actions or data are tracked.

Encryption

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

Archiving

Audio files used and created by inContact Survey are not archived.


inContact Survey Administration



Manage DNIS Values

A DNIS is a unique identifier that the PBX sends to inContact Survey. 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.

Configure DNIS Values

To add DNIS values:

1. Click the **Administration** tab in the inContact WFO Web Portal and then click the **Add-Ons** sub-tab.
2. Expand **Surveys** in the left navigation menu and click **DNIS List**.
3. Click **Add**.
4. On the new line, enter values under **DNIS** and **Comment**. The comment can be a client name or some explanation of how the DNIS will be used in the survey work.
5. Click the Save  icon.

To edit or delete DNIS values, follow the same procedure but click the Edit  icon or the Delete  icon at step 3.

Import Multiple DNIS 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 DNIS 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 file can be created in Microsoft Excel. Some telephony equipment will export DNIS data as a file.

To import a CSV file of DNIS values:

1. Click the **Administration** tab in the inContact WFO Web Portal and then click the **Add-Ons** sub-tab.
2. Expand **Surveys** in the left navigation menu and click **DNIS List**.
3. Click **Import**.
4. Browse to the location of the CSV file, select it, and click **OK**.
5. If the first row in the CSV file is NOT a header (that is, it is a DNIS/Comment value), clear the **File contains a header row** checkbox.
6. Click **Upload File**. Review the records that are ready for importing. If any of the records are not correct, click **Cancel**, then edit the file and repeat the import. Otherwise, go to step 7.
7. If the records are correct, click **Import**.

Specify Survey Audio Directory Settings

Survey requires these two directories, and the application must have Create/Write permission for both:

- **Audio Prompt Upload Directory:** This is the location where messages and prompts are stored.
- **Audio Recording Directory:** This is the location where customer feedback recordings are stored.

To specify these directories:

1. Create the directories in the file system (for example, C:\SurveyPrompts). inContact Survey does not require specific names for these directories.
2. Click the **Administration** tab in the inContact WFO Web Portal and then click the **Add-Ons** sub-tab.
3. Expand **Surveys** in the left navigation menu and click **Survey Settings**.
4. Enter full path names for both directories.
5. Set the **Survey Audio Format** to SIP and then click **Save**.

Manage Surveys

Survey Forms Listing								
Import Filter By Status: All								
	Name	Status	DNES	Attempted Count	Created By	Created On	Last Modified By	Last Modified On
Edit	FridaySurvey	<input checked="" type="checkbox"/> Active		0	Administrator Administrator	10/5/2012 10:51:10 AM	Administrator Administrator	10/5/2012 10:50:51 AM
Edit	surveyFor5090	<input type="checkbox"/> Disabled		500	Administrator Administrator	5/5/2012 4:56:26 PM	Administrator Administrator	2/15/2013 5:18:07 PM
Edit	SurveyFormToDelete	<input checked="" type="checkbox"/> Active	1005,1000	0	Administrator Administrator	9/5/2013 1:28:06 PM	Administrator Administrator	9/5/2013 1:28:48 PM
Edit	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
Edit	SurveyFormToday	<input type="checkbox"/> In Progress		0	Administrator Administrator	9/18/2012 12:15:50 PM	Administrator Administrator	9/18/2012 12:17:23 PM
Edit	testAudioFormals(kt_3lj)	<input checked="" type="checkbox"/> Active	1003	0	Administrator Administrator	2/15/2013 3:10:50 PM	Administrator Administrator	2/15/2013 5:18:26 PM

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

The **Manage Surveys** screen displays 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.
- Clicking the **Edit** button to the left of the survey name 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), select/clear 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 Survey Editor. Custom forms are not supported.

Create a Survey

i Survey auto-saves forms while you are working on them. The **Save Draft** and **Save** options identify any missing required field data.

inContact recommends creating survey questions, responses, and actions on paper before you create the survey in inContact Survey. Each survey you create should have a unique, descriptive name; inContact recommends the name also incorporate a version number.



You may also wish to allow for these special circumstances:

- **Invalid Responses:** You can record a WAV file called Invalid_Response and place it in the Prompts folder in the same directory as the Survey executable. When Surveys is configured with the **Repeat Question After Invalid** setting as **Yes**, this file will play and the question will repeat whenever the caller enters a digit that is not in your list of valid responses. Special configuration by the deployment team is required for this functionality.
- **Question Repeats:** Sometimes callers may simply want to have a question repeated. You can accomplish this by instructing them to enter a digit that is not on your list of valid responses, which will force them into the Invalid Response protocol. Be sure that your recorded Invalid_Response message takes both scenarios into account so that callers are not confused.

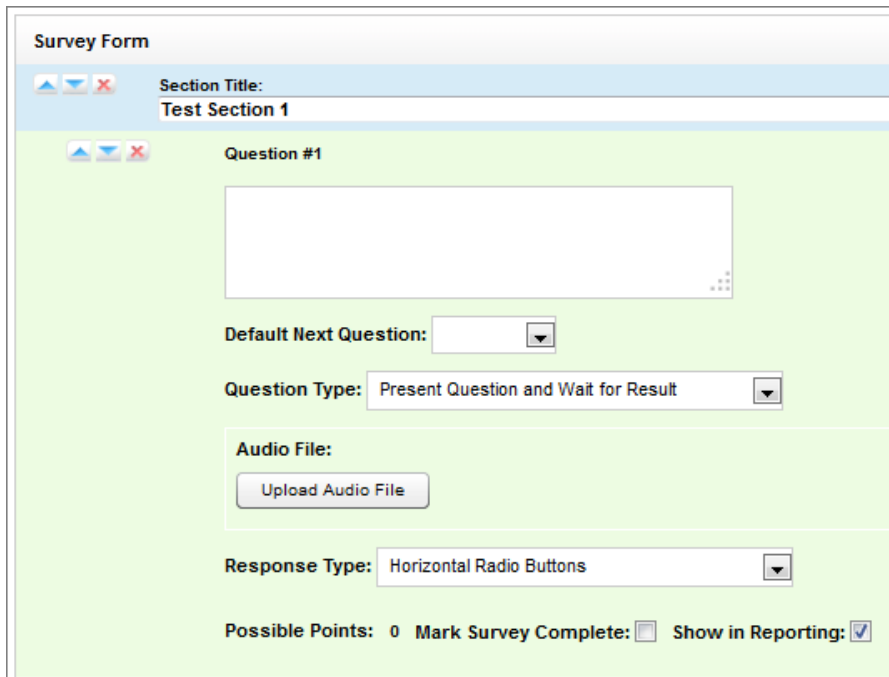
To build your survey in inContact Survey:

1. Click the **Surveys** tab in the inContact WFO Web Portal and then click **Create Survey** in the left navigation menu.
2. Enter a **Survey Name** and a **Description** if desired.
3. 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.
4. For **Recording Format**, select **GSM** from the drop-down list. This specifies the format of files produced when the customer records a verbal answer. GSM (a highly-compressed WAV format) is the only supported format is GSM.

i For more information on where these recordings are stored, see [Specify Survey Audio Directory Settings](#). A new folder is automatically created for each survey and numbered according to the number of survey forms created (that is, the tenth survey is placed in a folder numbered "10").

5. In the **Available DNIS** field, select the number(s) from which calls will be directed to this survey. Click the right-facing arrow  to move the number to the Attached **DNIS** field or the left-facing arrow  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. This image shows the section, question, and response portion of the Survey Editor.




The screenshot shows the 'Survey Form' editor. At the top, there's a 'Section Title' field containing 'Test Section 1'. Below it, a question is added, labeled 'Question #1'. The question content area is empty. Below the question, there are several configuration options: 'Default Next Question' (a dropdown menu), 'Question Type' (set to 'Present Question and Wait for Result'), 'Audio File' (with an 'Upload Audio File' button), 'Response Type' (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 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.

Add a Question

Follow these steps to add a question in the **Survey Editor**:

1. Click **Add New Question**.
2. Enter the text of the question in the text box. Your entry should be the text 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 that will be stored in the Audio Prompt Upload Directory. 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, your files will be converted as follows:

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

6. **Response Type** is not used by audio-based surveys. This is reserved for future use with web browser-based surveys.

7. **Optional:** Select the **Mark Survey Complete** checkbox. You can require responses for certain questions 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. In this scenario, question 5 would be scored as 0 out of the possible points for Question 5. Any survey not reaching Question 4 would be marked as "incomplete."
8. **Optional:** Clear the **Show in Reporting** checkbox. 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 clear this checkbox for these items. Otherwise, this question will display with no data responses.

i 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:** Exports the survey form as an XML file.
 - **Delete:** Removes in-progress forms while you're working on them. Do **not** delete forms that have been used; disable them using the **Form Manager** instead. For related information, see [Manage Surveys](#).
 - **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**.

Question Types

Question Type	Used To:	Response Values
Present Question and Wait for Result	<ol style="list-style-type: none"> 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) 2. Present a question and wait for touch-tone input 	<p>Response Text: enter the text of the response</p> <p>Point Value (optional)</p> <p>DTMF: touch-tone input value for response (for example: 1 for Yes, 2 for No, and so forth); each response must have a unique DTMF value</p> <p>Next Question: allows you to direct the survey based on response (for example: Yes leads to Question 3, No to Question 4)</p>
Collect Customer Information	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. For related information, see Beep Tone .	
Collect Digits	Allow the customer to leave a string of numeric values (such as transaction number or customer ID) using the 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)	
End Survey	Convey closing message. Call automatically disconnects after execution of this audio file.	

<p>Threshold Branch</p>	<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 Mark Survey Complete option. An example of this type of question and the associated logic is shown below.</p>	<p>Negative Percentage Threshold: surveys with current percentage below this value are negative (current accumulated points/current total possible points)</p> <p>Positive Percentage Threshold: surveys with current percentage above this value are positive (current accumulated points/current total possible points)</p> <p>Negative Next Question: next question for surveys at negative threshold</p> <p>Neutral Next Question: next question for surveys between thresholds</p> <p>Positive Next Question: next question for surveys at positive threshold</p>
-------------------------	--	---

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 Figure 1). If the technician's technical skills were satisfactory, the caller is presented with another question prior to the survey's conclusion (see Figure 2).

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"/>	0pts
No	<input checked="" type="checkbox"/>	
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"/>		
1-110934.wav		
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.

Figure 1

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

Figure 2

Search Attempted Surveys (Form Search)



If you have permission to view surveys, you will also be able 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 the calendar icon to set the start date for your search period.
- **End Date:** Click 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.

To search for surveys:

1. Click the **Surveys** tab in the inContact WFO Web Portal and then click **Form Search**.
2. Enter your desired search criteria.
3. Click **Search**.

Survey Reports

Survey Reports Overview

Survey includes a number of pre-built reports, called Printable Reports. You can also use inContact WFO's ad hoc reporting functionality to build reports using Survey data. You must have appropriate permissions for reporting. For more information on permissions, talk to your inContact WFO application administrator or visit inContact WFO online help.



Report	Description	Date Created
Survey Detail	Detailed breakdown of survey responses	10/22/2013
Survey Detail Summary	Deta 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** screen lists the available Printable Reports. The **Date Created** column shows the date that the template for the report type was created in the system.

Reporting Criteria Reference

You can use these criteria to specify the data included in a Printable Report. Not all criteria may be applicable to or available for some reports.

- **Start Date** — Click the calendar icon to set the start date for your search period.
- **End Date** — Click the calendar icon to set the end date for your search period.
- **Agent** — Select an agent's name or select **All** from the drop-down list.
- **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.
- **Surveys/Forms/Form ID** — Select one form, multiple forms, or all survey forms can be selected from the list provided.
- **Survey Complete** — Surveys are either complete or incomplete based on whether the respondent reached a question that had the **Mark Survey Complete** option selected. You can limit your search to **Complete**, **Incomplete**, or **Any** using the drop-down list.

- **ANI:** To limit your report to surveys delivered to a specific caller, enter the ANI (CallerID) information here.

i If the respondent was manually redirected to the survey by an agent, the ANI may not accurately reflect the respondent's number, depending on your telephony equipment.

- **DNIS:** Surveys can be configured so that customers receive different surveys based on the number they call to reach you (DNIS). To limit your report to surveys delivered via a specific DNIS, enter that information here.
- **Question ID:** To limit your report to a specific question, select from the list provided. This list is populated only after you have selected a survey for the report.

You can use saved criteria sets for reports that you run regularly. You can also use many of these criteria items when generating ad hoc reports. For more information about saved criteria sets and about building and generating ad hoc reports, see the *inContact WFO Reporting Manual*.

Generate a Survey Report

To generate a Printable Report for Survey data:

1. Click **Reporting** in the inContact WFO Web Portal and expand **Printable Reports** in the left navigation menu.
2. Click **Survey Reporting**.
3. In the **Report** column, click the name of the report you wish to generate.
4. Enter the desired criteria and click **Generate Report**.

Printable Reports for Survey Data

This section provides you with explanations and images for each of the Survey-related Printable Reports. For related information, see [Reporting Criteria](#) and [Generate a Survey Report](#).

Survey Detail Report

The **Survey Detail** report shows complete responses for one or more survey respondent(s) and also provides information about the respondent, such as DNIS and ANI.

i IP Address is not used at this time.

Form:		CallCopy Customer Survey	Record:	53190
DNIS:	7533	ANI: 5010	Survey Date:	4/1/2011 9:38 AM
Survey Complete:	Yes	IP Address:		
Satisfaction		Score: 10 of 10 (100%)		
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.

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

Survey Detail Summary Report

The **Survey Detail Summary** 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 Report

The **Survey Overview** report calculates the shown categories for each survey form in a time period. 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 Overview - 9/27/2011 CallCopy Recorder Reporting Service Page 1 of 1

Survey Summary Report

The **Survey Summary** report calculates the shown categories for all surveys in a time period, and displays them on a per-survey basis. 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 - 9/27/2011 CallCopy Recorder Reporting Service Page 1 of 1

Survey Summary by Agent Report

Survey Summary by Agent 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 Question Report

The **Survey Summary by Question** report provides a count of each given response to each of the questions in a survey form. You can select a date range, the survey form to evaluate, DNIS/ANI numbers, and survey completion status. For each form evaluated, the generated report displays the number of surveys completed and average score, followed by counts and score percentages for each question in the form. The Survey field is required.

Start Date: 1/1/2009 End Date: 8/8/2012 Survey: surveyFor5090

DNIS: ANI: Survey Complete: Complete

1 of 1 Find | Next

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 Question - 8/8/2012
CallCopy Recorder Reporting Service
Page 1 of 1

Survey Summary by Response

Survey Summary by Response helps you 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. This report works well with surveys where one question addresses a respondent's overall opinion of a product or service, and follow-up questions elicit the reasons or factors for that overall opinion.

For example, a Car Satisfaction Survey may be designed where customers who purchased any new car within the last year are surveyed. One question asks 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.

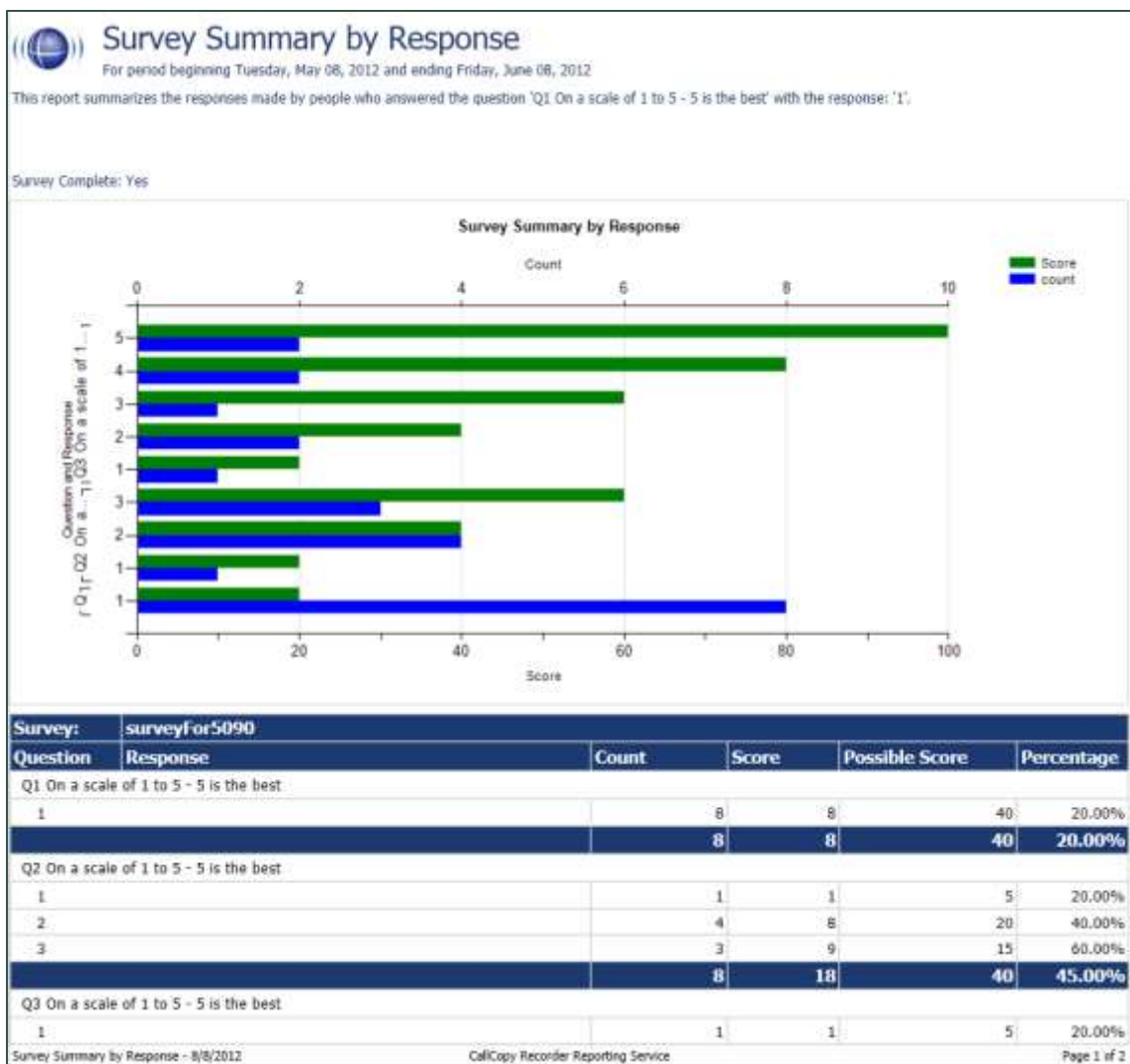
Multiple versions of this report may need to be created in order to identify the relationships between a question's responses and the responses on the other questions. In other words, if Question 1 has four possible responses, and that question is used as the overall or control question, then a report 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**: Number of response options multiplied by the point value for a response.
- **Percentage**: Score / Possible Score

This report can be run for all questions except Collect Customer Information questions. Because this question type allows customers to leave a recorded voice message as a response, Survey cannot include the response in any type of calculation. If you inadvertently include a question of this type as you build this report, Survey will not populate the Response field. Attempting to run the report anyway generates the error message, "Response value must be selected."

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.



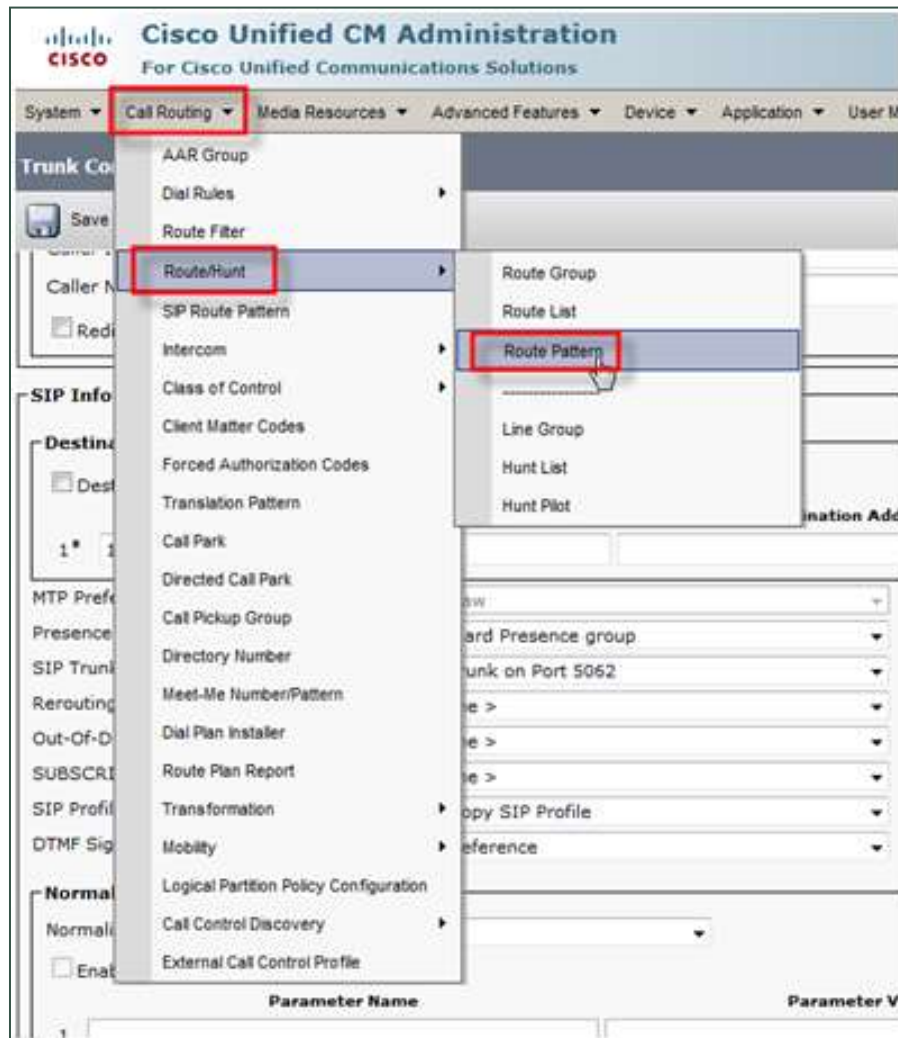
Appendix: PBX Configuration Examples

This section provides screen images of PBX configuration examples for SIP trunks used with inContact Survey. This is **not** an inclusive list and inContact makes no guarantees that these configurations will work in your scenario. You should always use documentation from your PBX manufacturer to configure PBX settings. Consult your PBX support or vendor for specific questions regarding your installation.


Cisco

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

Set Route Pattern



Status

 Status: Ready

Pattern Definition

Route Pattern*

Route Partition

Description

Numbering Plan

Route Filter

MLPP Precedence*

Resource Priority Namespace Network Domain

Route Class*

Gateway/Route List* [\(Edit\)](#)

Route Option
 Route this pattern
 Block this pattern

Call Classification*

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

Called Party Transformations

Discard Digits

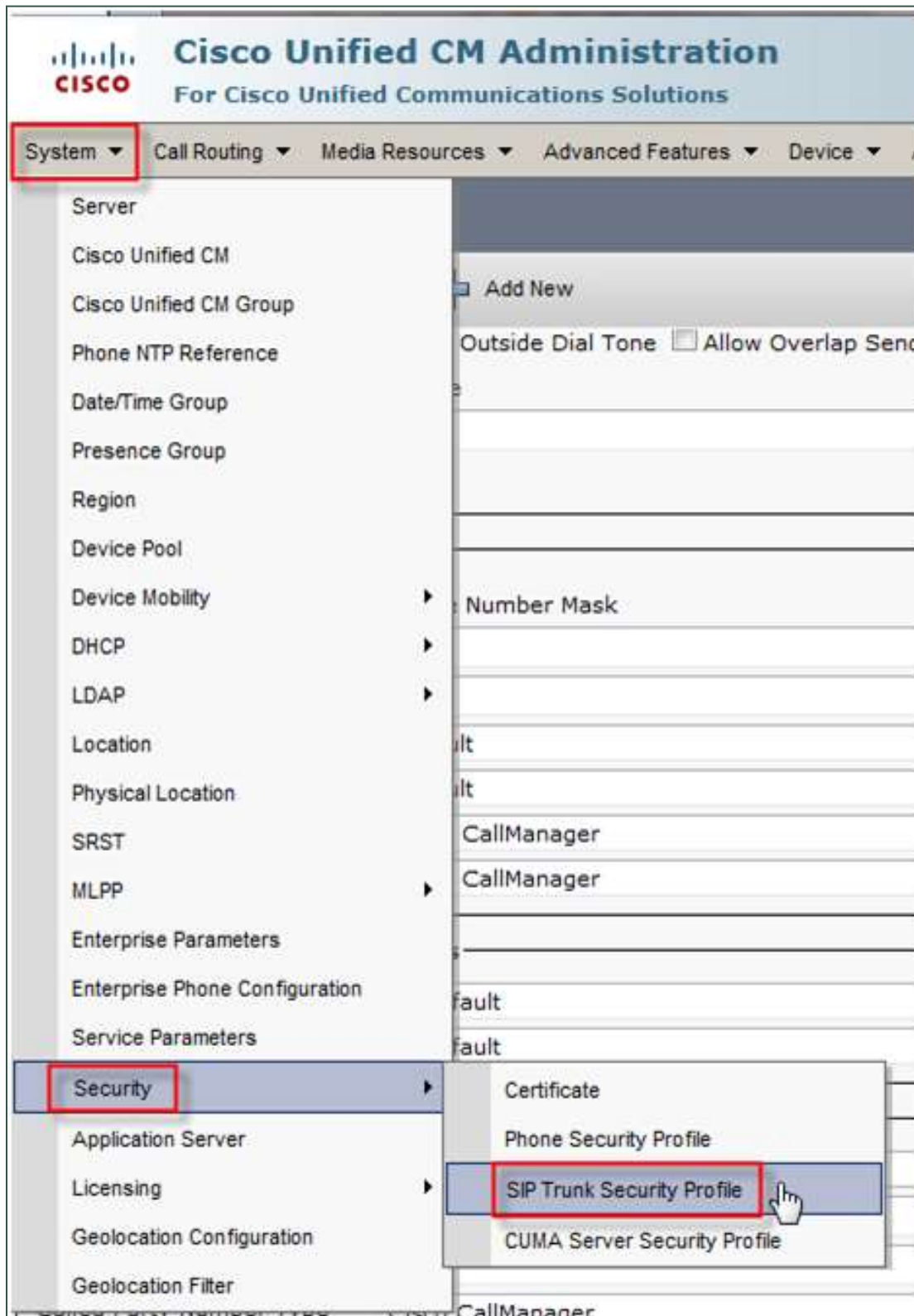
Called Party Transform Mask

Prefix Digits (Outgoing Calls)

Called Party Number Type*

Called Party Numbering Plan*

Set SIP Trunk Security Profile



i The default TCP port for Survey is 5060. In the following image, an alternate TCP port (5062) is used. Alternate ports are sometimes required to avoid port conflicts. Ask your deployment team if this applies to you.

Status

i 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

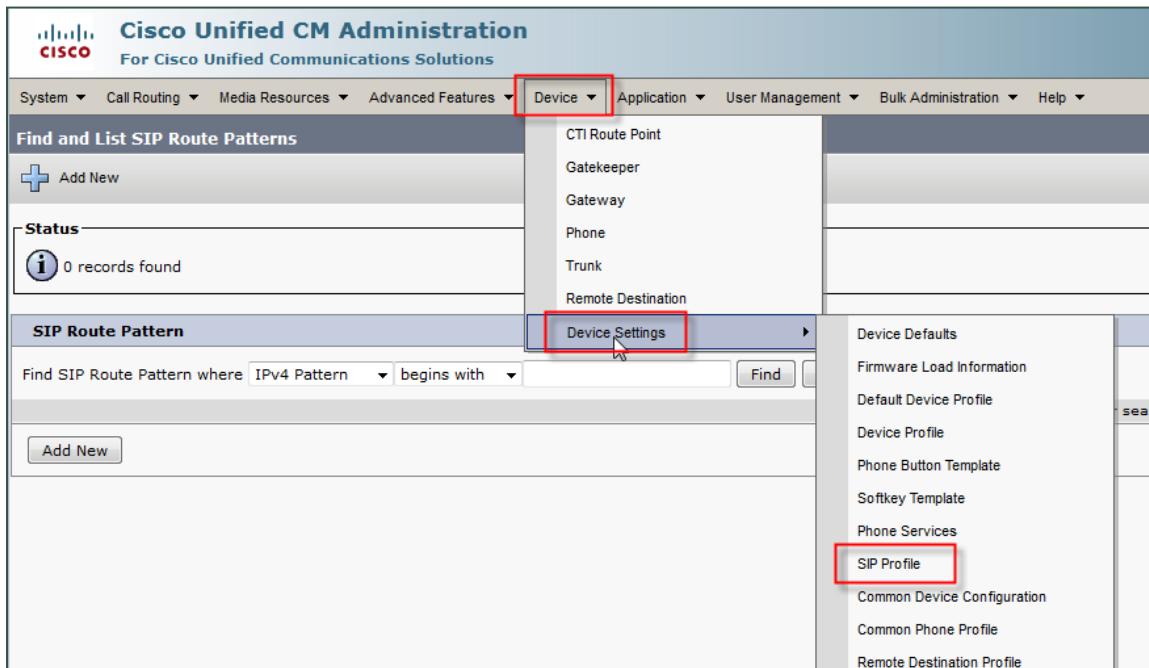
Accept Replaces Header

Transmit Security Status

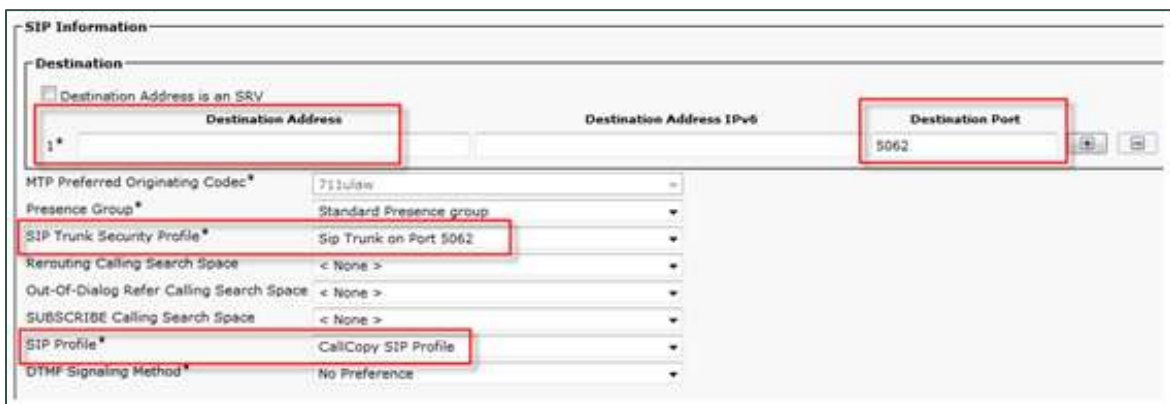
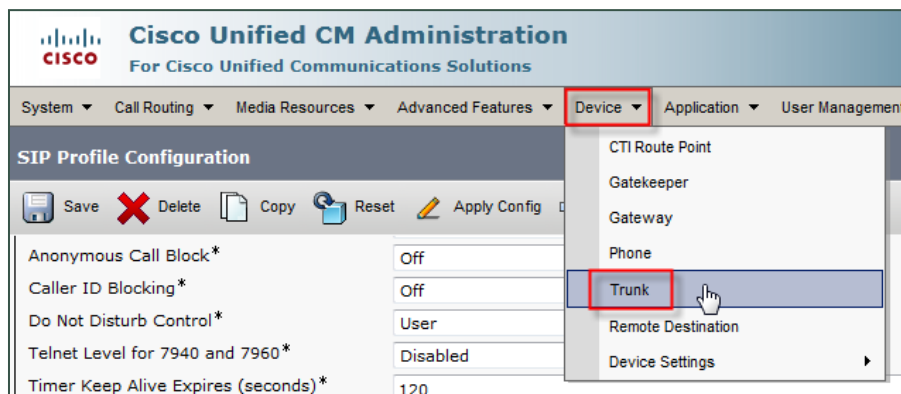
i *- indicates required item.

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

Configure SIP Profile



Configure Trunk



Avaya SIP

Create Node

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

```
change node-names ip Page 2 of 2
IP NODE NAMES
Name          IP Address
-----
qavm

```

(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.

i If your organization deploys Survey and inContact Call Recording on the same server, an alternate port may have been used to avoid port conflicts. Ask your deployment team if this applies to you.

```

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

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

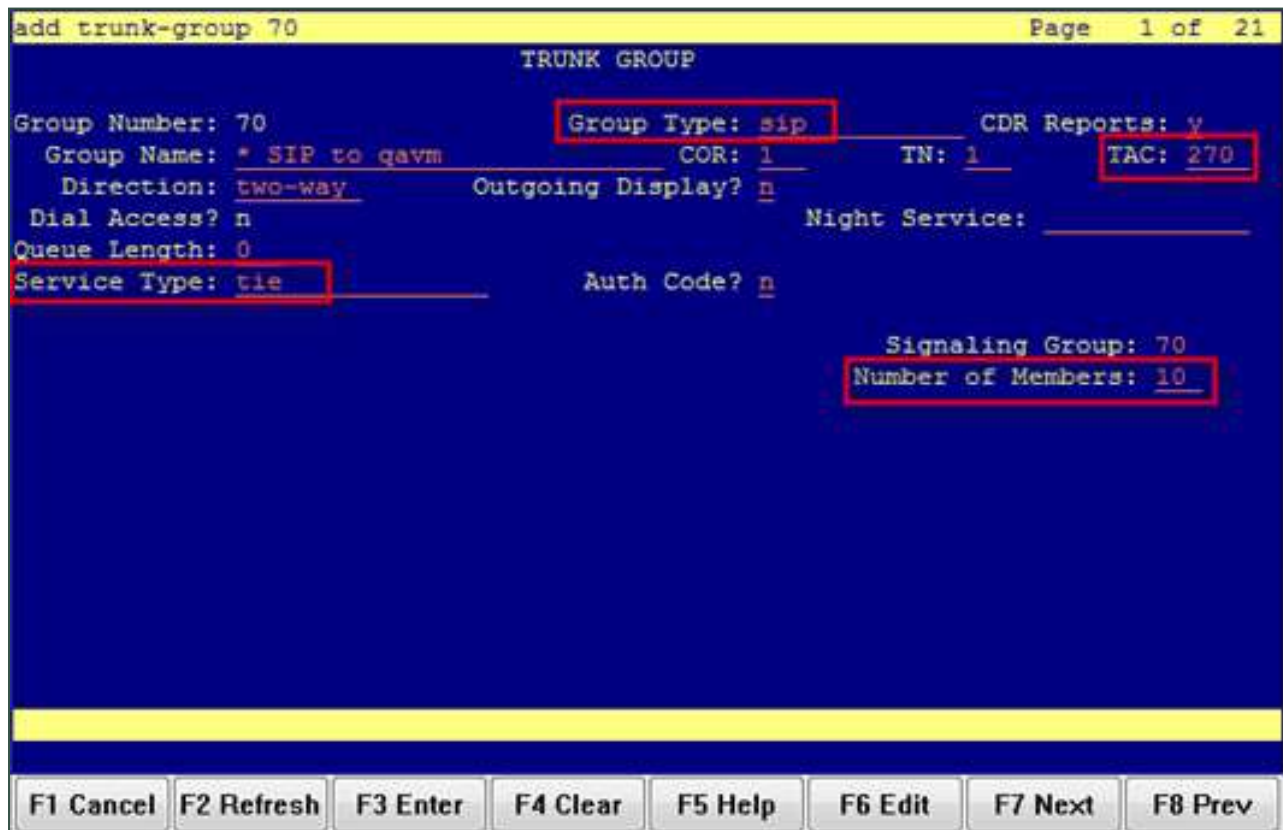
Create Trunk Group

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 your 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/ QSIG Intw	IXC
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	ITC	BCIE	Service/Feature	PARM	No. Dgts	Numbering Format	LAR
0	1	2	M	4	W	Request				
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

Subaddress

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

Set ARS Digits

Dialed String: DNIS numbers associated with surveys. You can represent a range (42xx means 4200 through 4299) or list individual DNIS numbers on this page.

Total Min/Max: Number of accepted digits for dialed string.

Route Pattern: Same as Pattern Number from previous screenshot.

Call Type: locl (allows dialing just an extension to forward to survey rather than a full 11-digit number)

ANI Reqd: Yes

change ars analysis 0 Page 2 of 2

ARS DIGIT ANALYSIS TABLE
Location: all Percent Full: 0

Dialed String	Total Min	Total Max	Route Pattern	Call Type	Node Num	ANI Reqd
42xx	4	4	70	locl		<input checked="" type="checkbox"/>
						n
						n
						n
						n
						n
						n
						n
						n
						n
						n
						n
						n
						n
						n
						n
						n
						n
						n
						n
						n
						n
						n
						n

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 UI 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

Program Vectors for Automatic Transfer

This screen provides values for creating a vector variable to ensure the caller is disconnected when the survey ends (instead of redirected to the ACD).

display variables							Page 39 of 39
VARIABLES FOR VECTORS							
Var	Description	Type	Scope	Length	Start	Assignment	VAC
ZI							
ZJ							
ZK							
ZL							
ZM							
ZN							
ZO							
ZP							
ZQ							
ZR							
ZS							
ZT							
ZU							
ZV							
ZW							
ZX							
ZY							
ZZ	uptivity repeat issue	collect P		1		1	

This example shows a vector used to transfer an incoming call to an agent. When the caller is to be transferred to the survey automatically upon agent disconnection, the **Variables** field must be set to **y** and the **VDN Return Destination** must be set to the vector or number that forwards the caller to the survey (not shown in this screen capture).

display vector 984		Page 1 of 6
CALL VECTOR		
Number: 984	Name: Test CC Queue	
Multimedia? n	Attendant Vectoring? n	
Basic? y	EAS? y	
Prompting? y	LAI? y	
Variables? y	3.0 Enhanced? y	
01 #	Test Call Copy and Survey	
02 set	ZZ = none ADD 1	
03 queue-to	skill 12 pri 1	
04 wait-time	60 secs hearing music	
05 announcement	01221	
06 wait-time	90 secs hearing music	
07 goto step	4 if unconditionally	
08 stop		
09		
10		
11		
12		

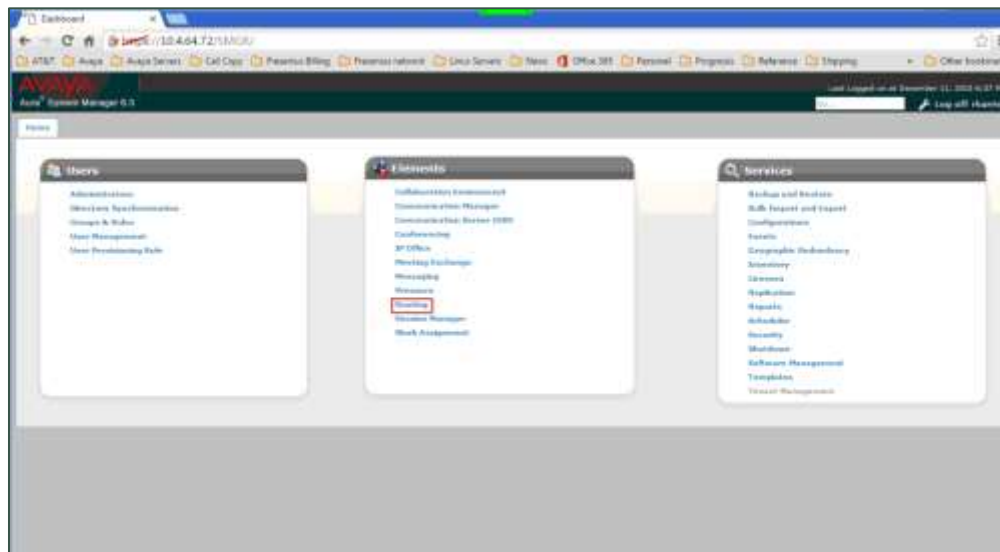
This example shows a vector that routes the caller to the survey and increments the variable. If the variable is greater than one (in other words, the user has been directed to the survey before), the caller is disconnected.

```
display vector 99                                     Page 1 of 6
                                     CALL VECTOR
Number: 99                                           Name: Survey Return
Multimedia? n      Attendant Vectoring? n      Meet-me Conf? n      Lock? n
Basic? y      EAS? y      G3U4 Enhanced? y      ANI/II-Digits? y      ASAI Routing? y
Prompting? y      LAI? y      G3U4 Adv Route? y      CINFO? y      BSR? y      Holidays? y
Variables? y      3.0 Enhanced? y
01 #      Return Destination For Appointment Center Survey
02 wait-time      1      secs hearing silence
03 goto step      6      if ZZ      >      1
04 set      ZZ      = ZZ      ADD      1
05 route-to      number 09650      with cov n if unconditionally
06 disconnect      after announcement none
07 stop
08
09
10
11
12
```

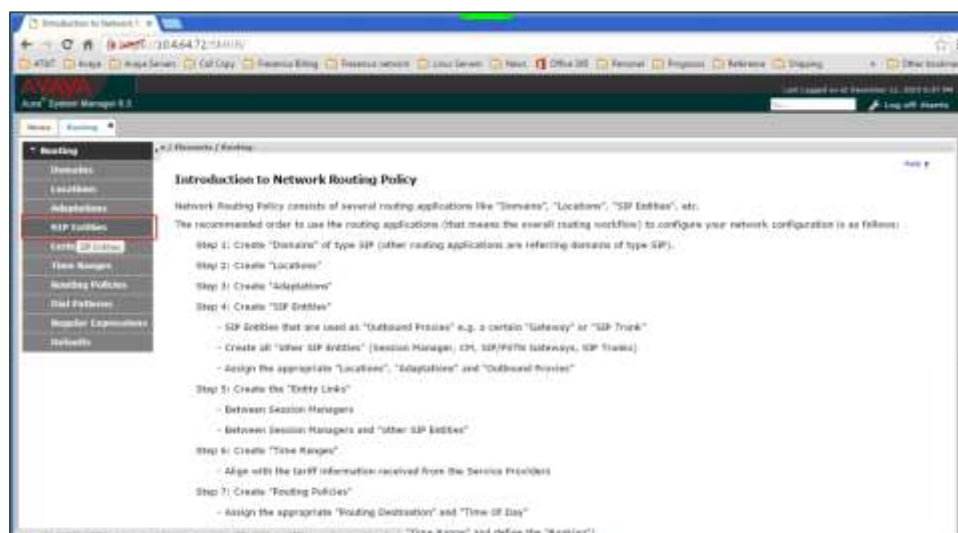
Avaya Session Manager

Screenshots in this section are taken from the web interface for Session Manager v6.3 on an Avaya Aura PBX. inContact Survey must be v5.6 or later. The integration has been tested with Session Manager and Communication Manager v6.3.

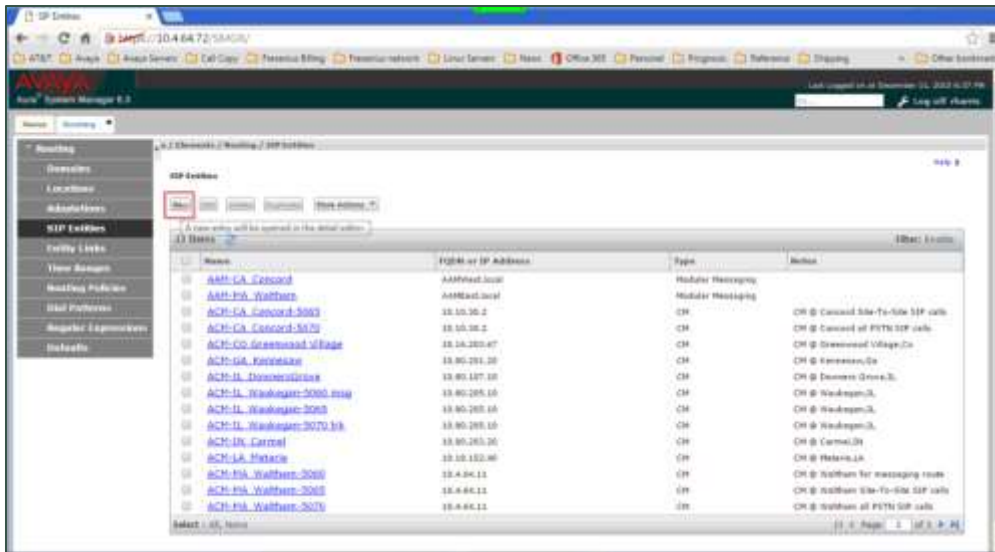
5. Log into Session Manager with an appropriately-permissioned account.
6. In the Elements section, click **Routing**.



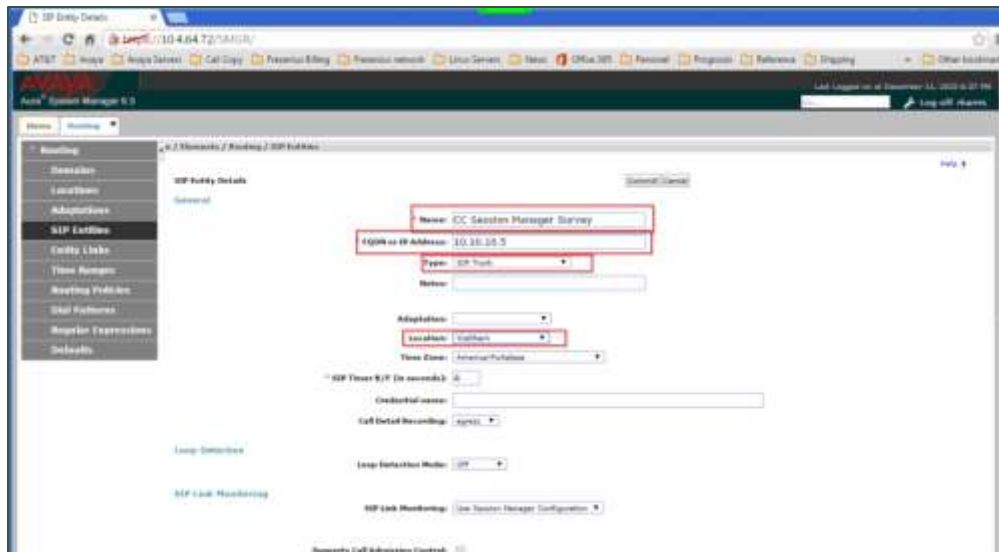
7. Click **SIP Entities**.



8. Click **New**.

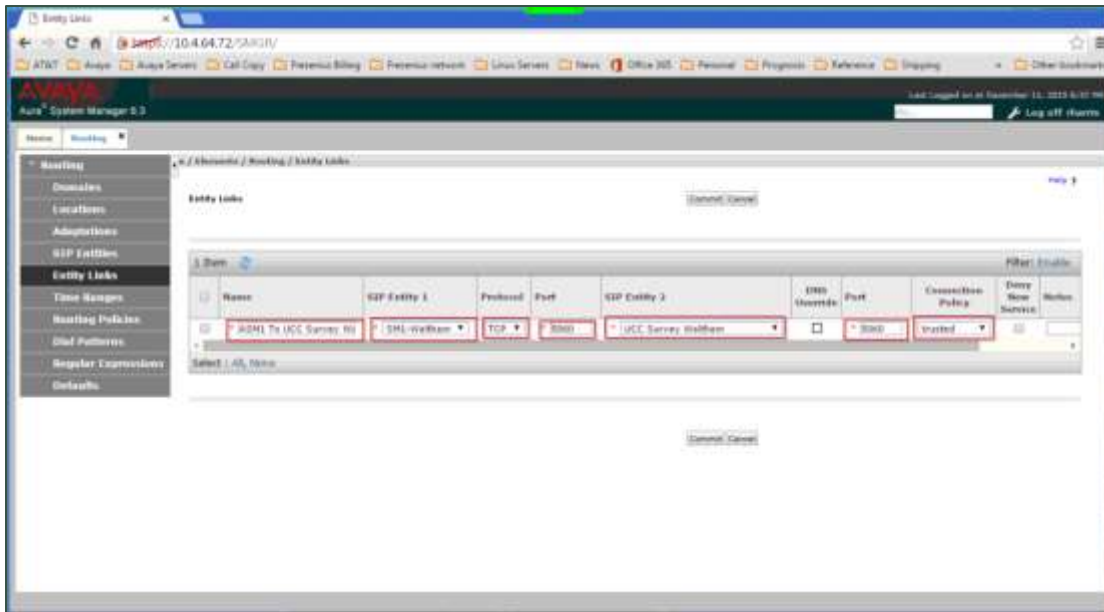


9. Complete the fields as indicated in this image. The fields framed in red will vary for each customer.



10. Click **Commit**.

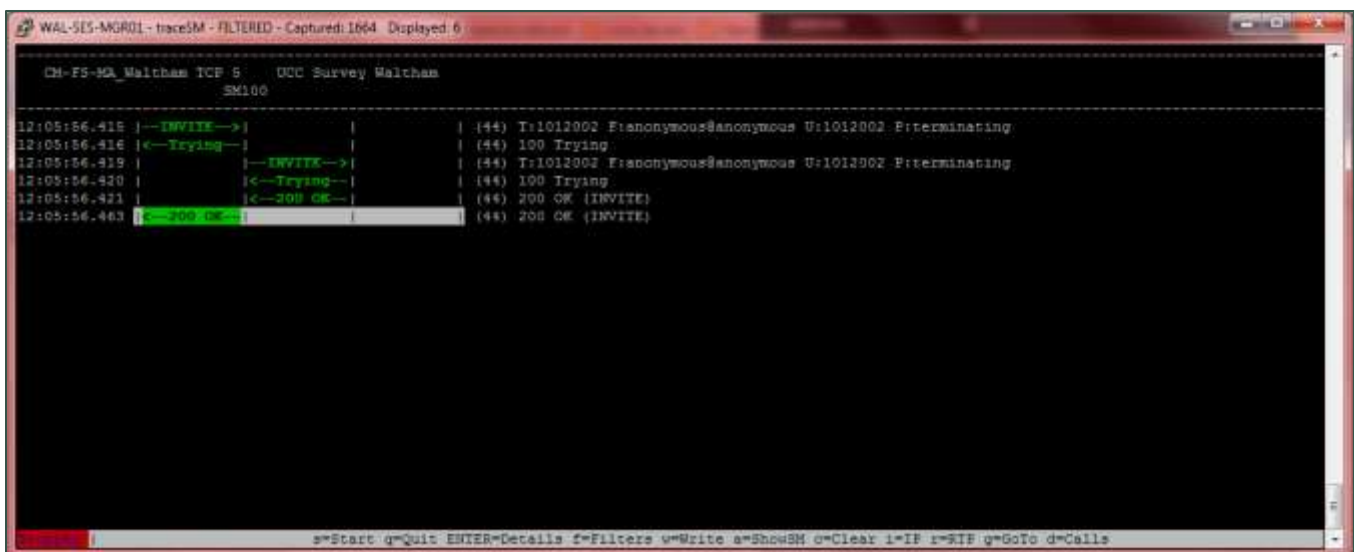
- Click **Entity Links** and complete the fields as indicated in this image. The fields framed in red will vary for each customer.



- Click **Commit**.

- Expand **System Status** and click **SIP Entity Monitoring** to verify that the link between Session Manager and the Survey server is present.

You can confirm that Session Manager has been configured correctly by running a trace and viewing the traffic between Session Manager and the Survey server. The following image shows an example of successful communication.



Document Revision History

Revision	Change Description	Effective Date
0	Initial version for this release.	2016-04-30
1	Added support for Avaya CM/Session Manager 7	2017-02-09