



A MITEL
PRODUCT
GUIDE

Mitel OpenScape Contact Center Enterprise

OpenScape Customer Satisfaction Survey

User Guide

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1 Introduction

This guide describes how to make use of the OpenScape Customer Satisfaction Survey (CSAT Survey) feature when using the OpenScape Contact Center communication system.

CSAT Survey allows transferring a voice media contact to a CSAT Survey destination number, after being handled by an agent.

To use the CSAT Survey functionality, after the conversation with the agent, the caller must stay on the call to receive one or more survey questions. The call must be disconnected by the agent.

Only the calls where the contact data has a CSAT Survey destination number associated will be followed by a CSAT Survey.

By default, after the call is enqueued and connected to an agent, the caller is invited to participate in the CSAT Survey. If the called agrees to participate, the contact data is associated with the call.

The caller can answer survey questions, by pressing keys on the phone or responding verbally.

The survey results can be accessed through reports.

2 Functional Description

CSAT Survey can be integrated with following solutions:

- OpenScape Contact Center Call Director
- OpenScape Contact Media Service Voice Portal
- Third Party IVR

The callers can choose at the beginning of the call whether they want to participate in the CSAT Survey. Depending on the answer, the contact data will be associated with the call or not. In a **Routing Strategy Workflow**, this can be achieved by configuring a **Menu Prompt** node to ask for participation, followed by a **Contact Data Update** node to set the contact data in the affirmative case. These nodes can be positioned in the Routing Strategy Workflow at any appropriate place before the enqueue of the call.

NOTICE: The default input timeout for survey wave files is **15 seconds**. If a custom audio/ TTS message exceeds this duration, playback will restart. To accommodate longer messages, adjust the timeout value in the CSAT database (see [Configuring the CSAT database](#) on page 16).

Depending on the destination number of the contact data key, the caller can be transferred to one of multiple configured CSAT Surveys. At the end of the call, when the agent disconnects via the Agent Portal Web application, the system intercepts the disconnection and transfers the call to the CSAT Survey destination number.

NOTICE:

If the caller disconnects from the call before the agent, the CSAT Survey will not be executed.

2.1 Functions

The following functions are available with CSAT Survey:

- **CSAT Survey Management:** create, change, delete, activate and deactivate automatic post-call surveys.
- **CSAT Survey Report:** define and view survey reports per agent, time or queue.

Advantages of using CSAT Survey

- CSAT Survey can be integrated with existing Routing Strategy Workflows.
- The CSAT Survey ports are only used during the execution of the survey.

Limitations of using CSAT Survey

- CSTA Survey requires the OpenScape Contact Center solution.
- If the agent answers and/or disconnects the call via the physical phone or via a SIP soft phone, OpenScape Contact Center is not able to transfer the call to a CSAT destination number. In this case, the CSAT Survey will not be

Functional Description

executed. The agent must answer and disconnect the call using the Agent Portal Web application.

3 System Requirements

This chapter presents the system requirements for the CSAT Survey feature.

OpenScape Contact Media Service

The system requirements for OpenScape Contact Media Service are displayed in the following table:

Requirement	Description
Processor	1x Intel Xeon Gold 5118 2.3GHz
Memory	8GB-for every group of 50 TTS ports 24GB -for every group of 50 ASR ports
Hard Drive	HD1: 160 GB, 7200 RPM, SATA HD2: 100 GB, 7200 RPM, SATA
Display settings	1024 x 768 pixels with 16-bit color
Other	1 Gbps Ethernet network interface card

Table 1: System requirements for Contact Media Service

NOTICE: The CSAT Survey components are installed as part of CMS and requires a second hard disk to store the PostgreSQL database, recordings of natural voice for open questions and statistical data. The minimum requirement for basic functionality is 100GB, but it needs to be adapted according to the customer needs.

OpenScape Contact Center Server

For the OpenScape Contact Server system requirements, please refer to the *OpenScape Contact Center Enterprise V12, Installation Guide*.

Operation Modes

Operating mode without integration

4 Operation Modes

The following operating modes are available with the CSAT Survey feature:

- Without integration with OpenScape Contact Center Call Director, Contact Media Service Voice Portal or Third Party IVR
- With OpenScape Contact Center Call Director integration
- With OpenScape Contact Media Service Voice Portal or Third Party IVR integration

4.1 Operating mode without integration

In this case, the call is routed through the OpenScape Contact Center Routing Strategy and Queue Processing flows without any interaction with OpenScape Contact Center Call Director, OpenScape Contact Media Service Voice Portal or Third Party IVR. Using this operating mode, the caller does not have the possibility to participate in the CSAT Survey by default.

To use survey functionality with such configuration, the decision to transfer the call to CSAT Survey can be made in the Routing Strategy flow, by defining a **Source/DestinationDecision** node based on the destination number. The corresponding voice contacts are updated with the **Contact Data** key/value pair and are transferred to the CSAT Survey after the agent disconnects the call via Agent Portal Web. If the caller decides not to participate in the CSAT Survey, then the call can be disconnected by caller.

The following diagram displays the CSAT Survey operating mode without integration with OpenScape Contact Center Call Director, OpenScape Contact Media Service Voice Portal or Third Party IVR:

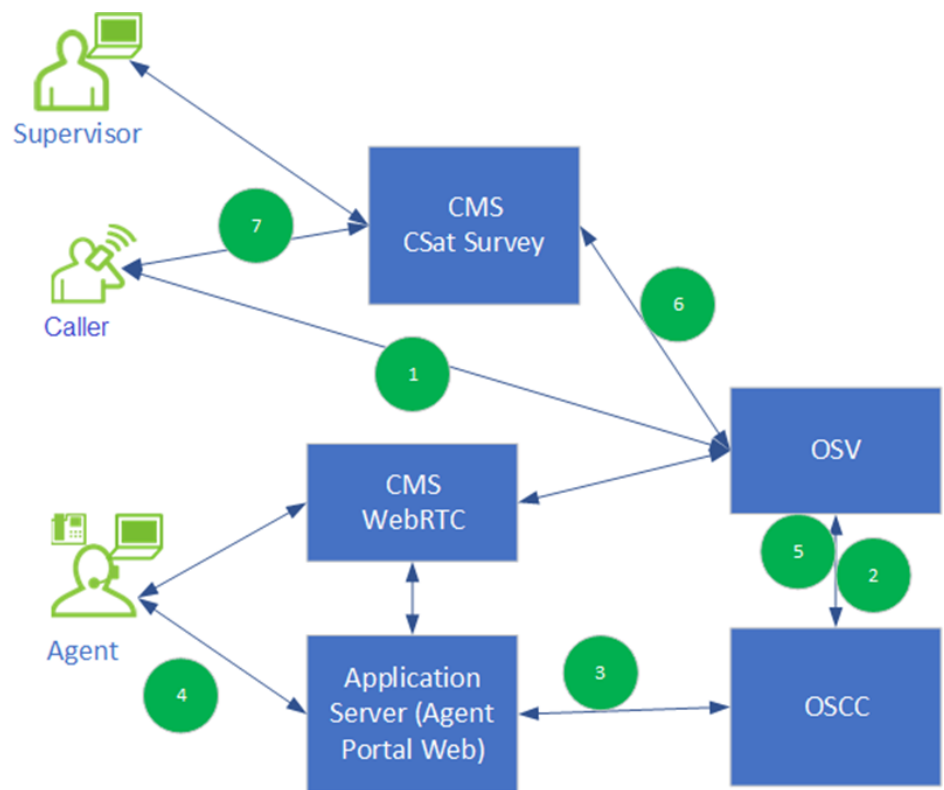


Figure 1: Operating mode without integration

The call flow for this scenario is the following:

- 1) The caller initiates a call to the OpenScape Contact Center pilot number.
- 2) The call is notified to OpenScape Contact Center system.
- 3) According to the Routing Strategy, the Contact Data is created/updated with the CSAT Survey destination number and the call is routed to an agent.
- 4) The agent disconnects the call via Agent Portal Web.
- 5) The OpenScape Contact Center system is notified about the call disconnection and checks if there is existing Contact Data for CSAT Survey.
- 6) If positive, the caller is transferred to the CSAT Survey destination number.
- 7) The CSAT Survey is executed for the caller.

4.2 Operating mode with OSCC Call Director integration

In this case, the call is routed through the Routing Strategy flow and a message is played in the **Menu Prompt** node. The purpose of the message is to ask the caller whether to participate in a CSAT Survey. If the caller agrees to participate in the survey, the key/value pair is created in the **Contact Data Update** node. Finally, the call is queued for queue processing and assignment to an agent.

The following diagram displays the CSAT Survey operating mode with OpenScape Contact Center Call Director integration:

Operation Modes

Operating mode with CMS Voice Portal or Third Party IVR integration

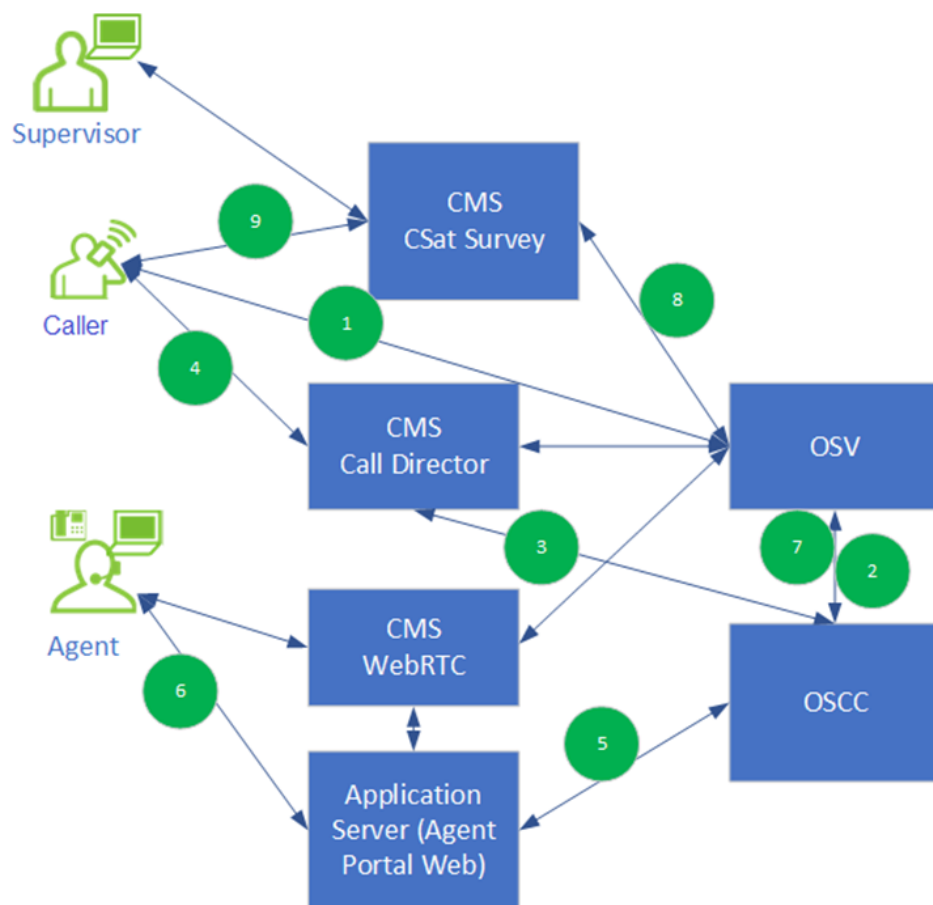


Figure 2: Operating mode with OSCC Call Director integration

The call flow for this scenario is the following:

- 1) The caller initiates a call to the OpenScape Contact Center pilot number.
- 2) The call is notified to OpenScape Contact Center system.
- 3) The Routing Strategy includes actions for interacting with OpenScape Contact Center Call Director.
- 4) The caller is asked whether to participate in the CSAT Survey at the end of the call. If the caller agrees to participate to the survey, a Contact Data key/value pair is created with the CSAT Survey destination number.
- 5) The call is routed to an agent.
- 6) The agent disconnects the call via the Agent Portal Web.
- 7) The OpenScape Contact Center system is notified about the call disconnection and checks if there is existing Contact Data for CSAT Survey.
- 8) If positive, the caller is transferred to the CSAT Survey destination number.
- 9) The CSAT Survey is executed for the caller.

4.3 Operating mode with CMS Voice Portal or Third Party IVR integration

In this case, the call is initially received by the Contact Media Service Voice Portal / Third Party IVR where the IVR flow offers to the caller the possibility to participate in a CSAT Survey. If the caller agrees to participate, then a Contact Data key/value pair is associated with the call before the call is transferred to

OpenScope Contact Center IVR Transit number. Finally, the call is queued for queue processing and assignment to an agent.

The following diagram displays the CSAT Survey operating mode with CMS Voice Portal / Third Party IVR:

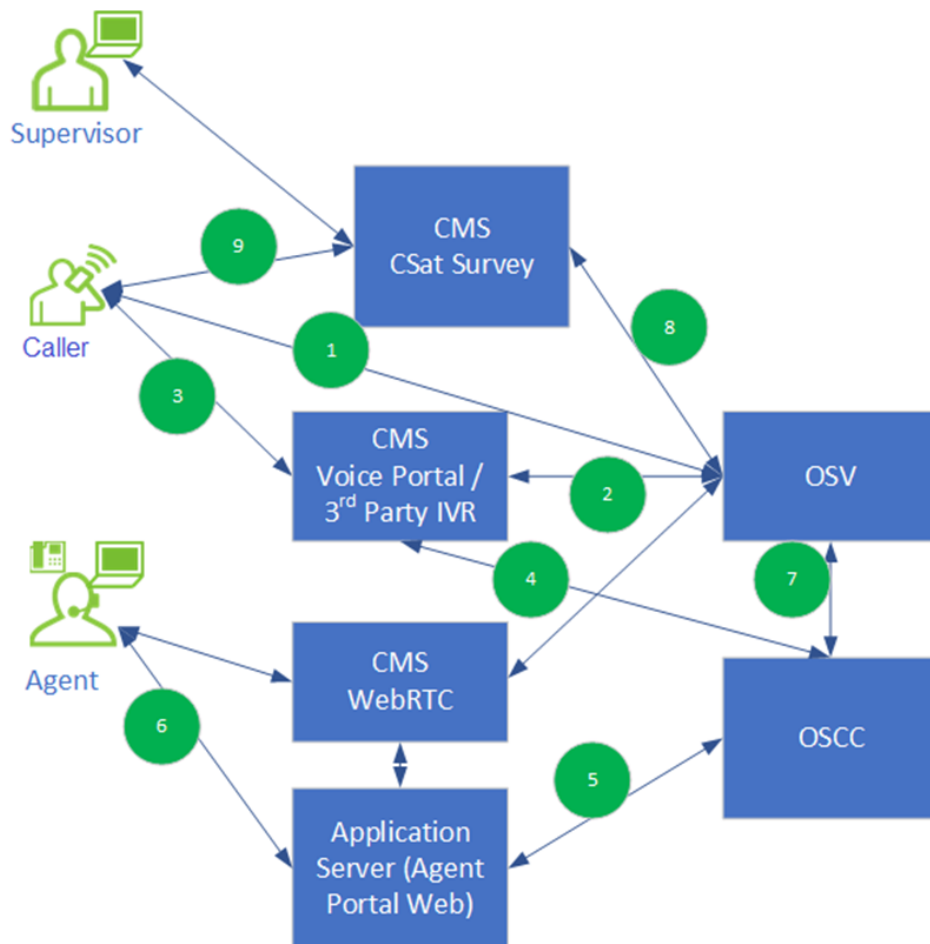


Figure 3: Operating mode with CMS Voice Portal or Third Party IVR integration

The call flow for this scenario is the following:

- 1) The caller initiates a call to the CMS Voice Portal/Third Party IVR pilot number.
- 2) The call is notified to CMS Voice Portal/Third Party IVR.
- 3) While in the IVR flow, the caller is asked whether to participate in the CSAT Survey at the end of the call. If positive, a Contact Data key/value pair is created with the CSAT Survey destination number.
- 4) The call is transferred to OpenScope Contact Center via the IVR transit number together with the updated/created Contact Data.
- 5) The call is queued and routed to an agent.
- 6) The agent disconnects the call via the Agent Portal Web.
- 7) The OpenScope Contact Center system is notified about the call disconnection and checks if there is existing Contact Data for CSAT Survey.
- 8) If positive, the caller is transferred to the CSAT Survey destination number.
- 9) The CSAT Survey is executed for the caller.

5 Components

The OpenScape Customer Satisfaction Survey feature uses the following components:

- **OpenScape Contact Media Service**

The component is responsible for:

- Applying the license for the CSAT Survey feature, and for the TTS and ASR ports.
- Enabling the CSAT feature.
- Uploading the desired Voice Portal language packages (TTS and ASR) to be used by the feature.
- Configuring the CSAT Survey Pilot Numbers.
- Configuring the REST SDK.
- Configuring the CSAT Survey PostgreSQL database
- Configuring the extensions for OSCC Call Director.
- Configuring the Voice Portal.

- **OpenScape Contact Center**

The component is responsible for:

- Configuring a Menu Prompt node, for asking the caller to participate in a CSAT Survey.
- Configuring a Contact Data Update node with the CSAT Survey destination number.
- Configuring the REST SDK.
- Transferring the call to the CSAT Survey destination number after being handled by an agent.
- Configuring the Call Director integration: connection, extensions and workflows.
- Configuring the Voice Portal/Third Party IVR integration: IVR transit number.

- **Communication Platform (OpenScape Voice and OpenScape 4000)**

The component is responsible for:

- Establishing the inbound calls
- Configuring the CSAT Pilot Numbers as SIP Trunk or Subscriber numbers.

- **CSAT Survey (OpenScape Contact Media Service)**

The component is responsible for:

- Creating the CSAT Survey User Roles.
- Creating and executing the CSAT Surveys.
- Uploading the wave files to be used in the CSAT Surveys.
- Uploading the Properties Files for the languages (ASR).

- **Third Party IVR**

The component is responsible for:

- Receiving the inbound calls and offer the possibility to the caller to participate in the CSAT Survey and create Contact Data with the CSAT Survey destination number.
- Transferring the call to OpenScape Contact Center for being routed to an agent.

6 Components Configuration

To deploy a complete environment for the CSAT Survey feature, it is necessary to configure certain components. The complete list of components that can be configured for this feature, is available in the [Components](#) on page 12 chapter.

Not all components need to be configured. The configuration depends on the operating mode and the functionality used.

6.1 OpenScape Contact Media Service

6.1.1 Licensing

To use the CSAT Survey feature with OpenScape Contact Media Service, the following licenses are needed:

- **CSAT License Ports**

The number of ports depends on the maximum number of concurrent inbound calls, for which the CSAT Survey is to be executed.

- **Text to Speech License Ports (TTS)**

This license is only mandatory if the CSAT Survey has questions in Text to Speech format (TTS). This license allows the caller to hear the CSAT Survey questions, read out by the system.

- **Automatic Speech Recognition License Ports (ASR)**

This license is only mandatory if the CSAT Survey has questions formulated to which the caller answers in natural language. This way, the answers are recognized by the system.

NOTICE:

Once the TTS and ASR ports are shared with Voice Portal, the amount of them can be equal or greater than the amount of CSAT ports.

The amount of TTS ports cannot be lower than the amount of CSAT ports.

The ASR ports are not mandatory but, if voice recognition is used in the survey, the amount of ASR ports cannot be lower than the amount of CSAT ports.

The licensing information is displayed in the **License Configuration** section of Contact Media Service.

Licensing	
License Type:	Regular License File
MAC Address:	00:50:56:95:D9:55
Basic IVR License Ports:	5
Voice Portal License Ports:	5
Voice Portal Base License Ports:	10
Csat License Ports:	15
Call Recording License Ports:	10
Integrated Phone License Ports:	10
Integrated Phone Video License Ports:	10
Speechbot License Ports:	10
Automatic Speech Recognition License Ports:	10
Text To Speech License Ports:	10
Outbound Dialer License Ports:	10

Licensing Scheme

☒ Stand-Alone
☐ Floating Client
☐ Floating Server

Call Recording License Mode

☐ Fixed Licensing
☒ On-Demand Licensing

License Allocation

Figure 4: Licensing information for Contact Media Service

6.1.2 Enabling the CSAT feature

Before proceeding with any configurations, the CSAT feature must be enabled and the service must be restarted.

Follow the steps below to enable the CSAT feature:

- 1) Open Contact Media Service and navigate to the **IVR Configuration** tab.
- 2) Under the **General** area, click the check box next to **CSAT Enabled** to enable the feature.
- 3) Click **Save**.
- 4) For the changes to be applied, you must restart the service. Click **Restart Service** in the upper part of the screen, next to **User**.

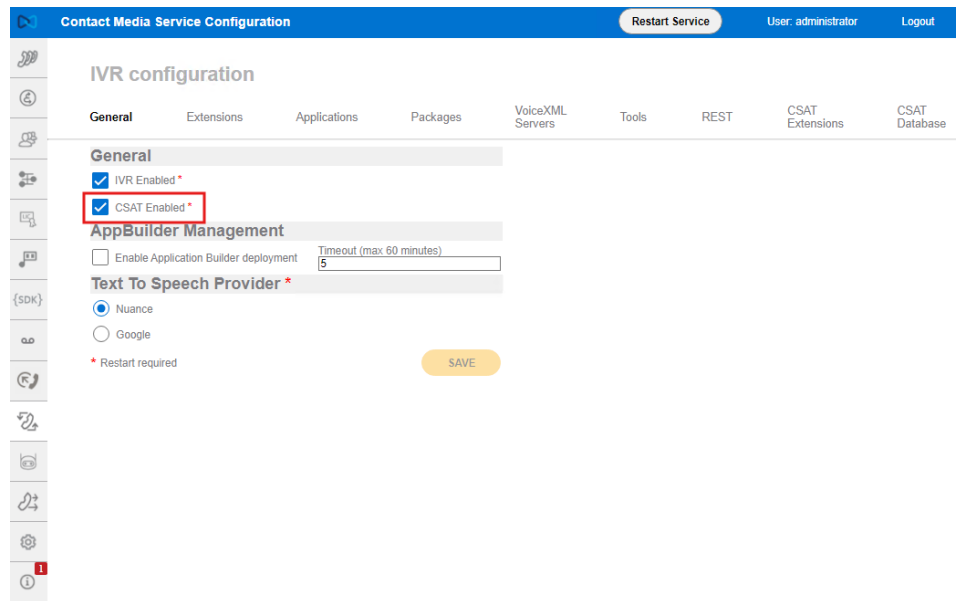


Figure 5: Enabling the CSAT feature in Contact Media Service

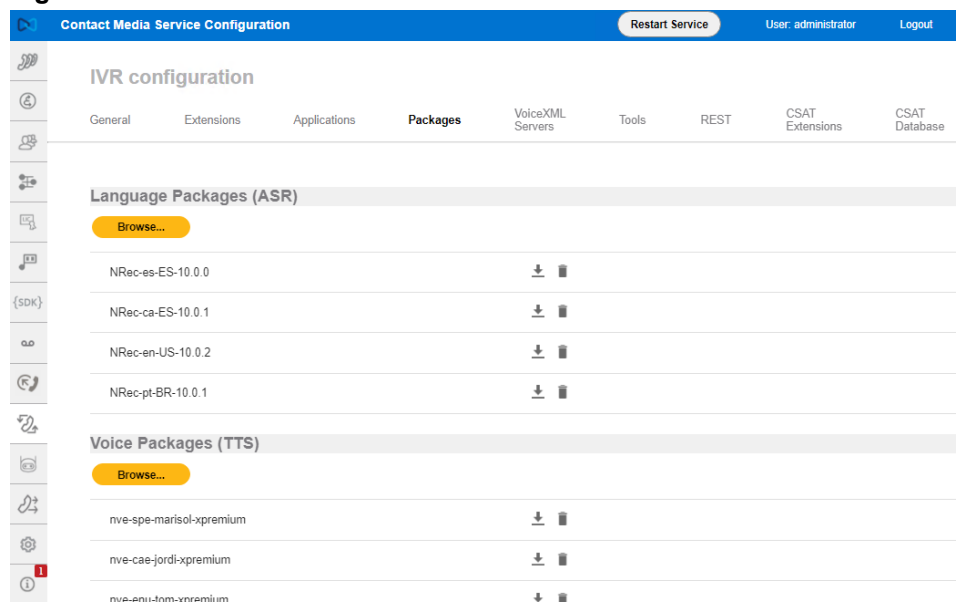
6.1.3 Uploading Voice Portal language packages

For the languages used by the CSAT Survey feature, you must upload the corresponding TTS and ASR packages.

Follow the steps below to upload language packages:

- 1) Open Contact Media Service and navigate to the **IVR Configuration** tab.
- 2) Open the **Packages Upload** tab.
- 3) Under the **Language Packages (ASR)** section, browse for and select the ASR package/s to be uploaded.
- 4) Under the **Voice Packages (TTS)** section, browse for and select the TTS package/s to be uploaded.

Figure 6:



6.1.4 Configuring the CSAT Extension

To use the CSAT Survey functionality, it is mandatory to configure the CSAT Extension resource. The role of this resource is to transfer the caller who accepted to participate in the CSAT Survey to the CSAT Extension number and start the survey.

The CSAT Extension resource can be a Sip Endpoint (Trunk) number, a subscriber number on OpenScape Voice or a Sip Trunk number on OpenScape 4000.

Follow the steps below to configure the CSAT Extension:

- 1) Open Contact Media Service and navigate to the **IVR Configuration** tab.
- 2) Open the **CSAT Extensions** tab.
- 3) Click **+ Add extensions** to add a new CSAT Extension number or edit an existing extension number according to your need.
- 4) Click the check box next to **Use as Trunk** if you wish to enable this option.
- 5) Click **Save**.

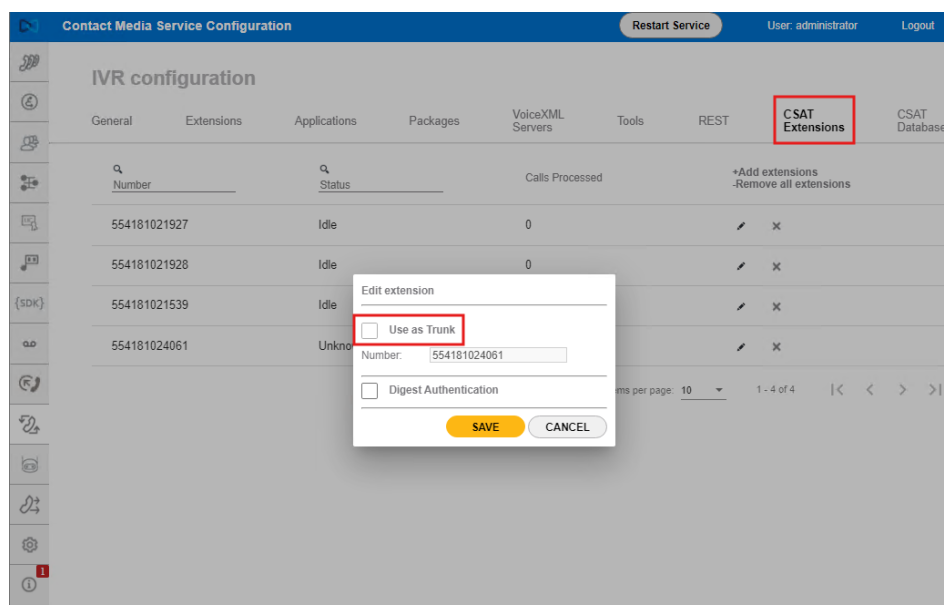


Figure 7: Configuring the CSAT Extension on Contact Media Service

6.1.5 Configuring the CSAT database

All configurations for the CSAT feature are stored in a PostgreSQL database, on the CMS server. It is possible to use the default settings for the CSAT database and change them only if needed:

The CSAT Database settings are available in the **CSAT Database** tab of Contact Media Service.

The **CSAT Database** tab includes the following sections:

- **Database Connection Credentials**

This section includes the credentials for local access to the database:

- Username (default: survey)
- Password

- **Database Remote Access Configuration**

This area is used to enable or disable remote access to the database and includes:

- The option to enable or disable remote access to the database, by clicking the check box next to **Enable Remote Access**.

By default, this option is disabled.

NOTICE: Once the Remote Access is enabled, it cannot be disabled.

- The **Username** credential

This field cannot be edited and, by default, it is filled with the value "survey reporter".

- The **Password** credential

This is an editable field.

- **Database Data Retention Configuration**

This field can be used to set the data retention period for keeping the survey data in the database.

The default data retention period is 3 months, but it can be changed to a value in the range of 1 to 60 months.

The screenshot displays the 'Contact Media Service Configuration' interface. At the top, there's a blue header with 'Contact Media Service Configuration', a 'Restart Service' button, and user information 'User: administrator' and 'Logout'. Below the header is a sidebar with various icons. The main content area is titled 'IVR configuration' and has several tabs: 'General', 'Extensions', 'Applications', 'Packages', 'VoiceXML Servers', 'Tools', 'REST', 'CSAT Extensions', and 'CSAT Database' (which is highlighted with a red box). Under the 'CSAT Database' tab, there are three sections: 'Database Connection Credentials' with fields for 'Username' (postgres) and 'Password' (masked); 'Database Remote Access Configuration' with a checked 'Enable Remote Access' checkbox, and fields for 'Username' (reportercsat) and 'Password' (masked); and 'Database Data Retention Configuration' with a description 'Delete ALL archived survey, including its information and statistics, older than', a dropdown menu set to '3 months', and a 'SAVE' button.

Figure 8: Configuring the CSAT Database in Contact Media Service

NOTICE:

The data retention period is not applied to the CSAT Surveys that are in the **Production** state. It affects only archived CSAT

Surveys and the CSAT Surveys, that are not yet in production (Draft state).

When applied, it deletes the entire Survey, including questions and statistics.

NOTICE:

The default input timeout is **15 seconds**. To ensure custom audio/TTS messages play fully, update the `input_timeout` value in the `system_config` table. For example:

```
UPDATE system_config SET input_timeout = <
seconds > WHERE id = 1 ;
```

Always restart the OSCMS service after making changes.

6.1.6 Configuring REST SDK

REST SDK must be configured to allow storing the Agent IDs from OpenScape Contact Center in the CSAT Survey Database and using them in the reports.

Follow the steps below to configure the REST SDK settings:

- 1) Open Contact Media Service and navigate to the **CTI Configuration** tab.
- 2) Click the check box next to **RestSDK Enabled** to enable this option.

- 3) The following figure displays an example of configuring the REST SDK parameters. Configure the parameters accordingly.

Contact Media Service Configuration Restart Service User: administrator Logout

CTI Configuration

General

RestSDK

☒ RestSDK Enabled

RestSDK URL:

Business unit name:

Client name:

Client token:

User name:

Password:

Status: Initialized

SAVE

Figure 9: Configuring REST SDK in Contact Media Service

6.1.7 Configuring OSCC Call Director

If the CSAT Survey feature is integrated with OSCC Call Director, then the OpenScope Contact Media Service extensions are needed to be configured for playing the Call Director messages.

For more information about the configuration steps, please refer to the OpenScope Contact Media Service Installation Guide.

6.1.8 Configuring CMS Voice Portal

In case of integration with **CMS Voice Portal**, the IVR flow must be configured. The purpose of such configuration is to offer to the caller the possibility to participate in the CSAT Survey and to provide the proper contact data information to transfer the call to the Survey.

The Contact Data must be created or update in the IVR flow and must have the following content:

Key	Value
__HPPC_OSCMS_CSAT	<CSAT Survey Pilot Number>

NOTICE: The contact data key must have the following name: **___HPPC_OSCMS_CSAT** (starting with three underscores).

The call must be transferred to the OpenScape Contact Center IVR transit number. An example of such configuration on the Application builder is displayed in the figure below:

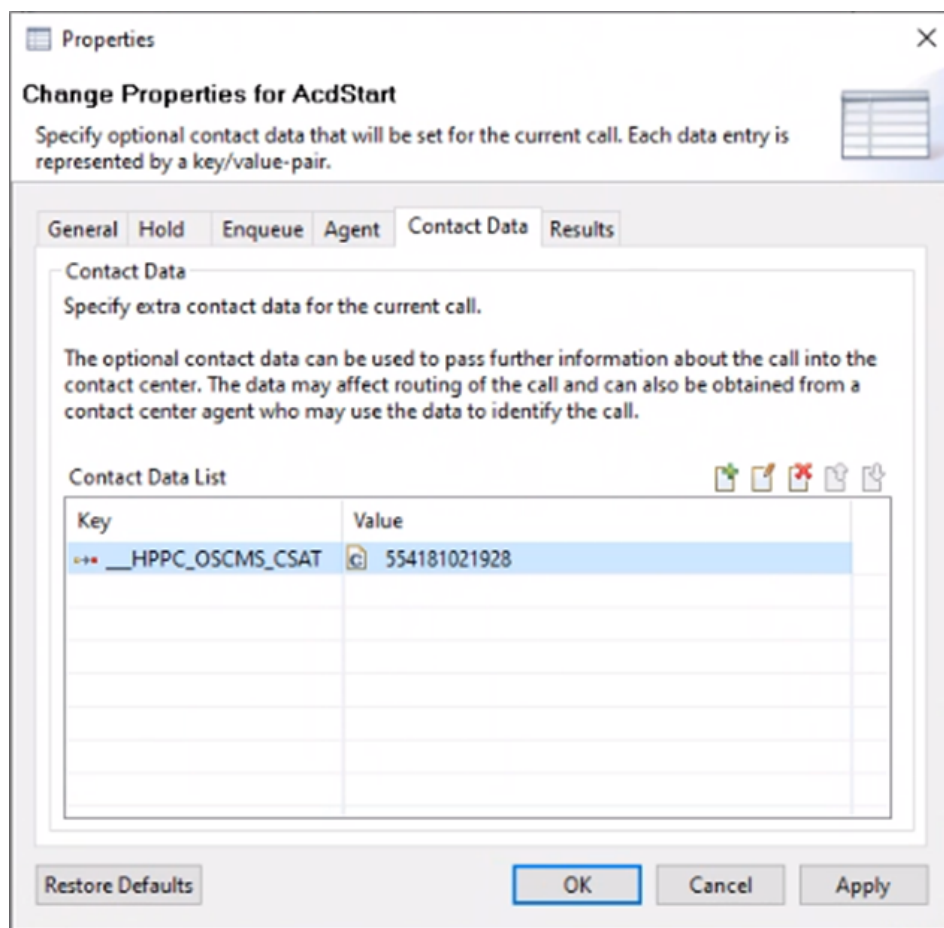


Figure 10: Configuration of IVR flow

6.2 OpenScape Contact Center

OpenScape Contact Center must be configured to update the contact data for each routed call that must be transferred to the CSAT Survey after being handled by an agent.

6.2.1 Configuring the Manager application

In the OpenScape Contact Center Manager application, the **Contact Data Update** node must be used in a Routing Strategy Workflow.

The contact data key must have the following name: **___HPPC_OSCMS_CSAT** (starting with three underscores).

The value of the contact data key is the CSAT Survey Pilot Number, which is the call transfer destination after being handled by the agent.

The contact data key must have the following format:

Key	Value
__HPPC_OSCMS_CSAT	<CSAT Survey Pilot Number>

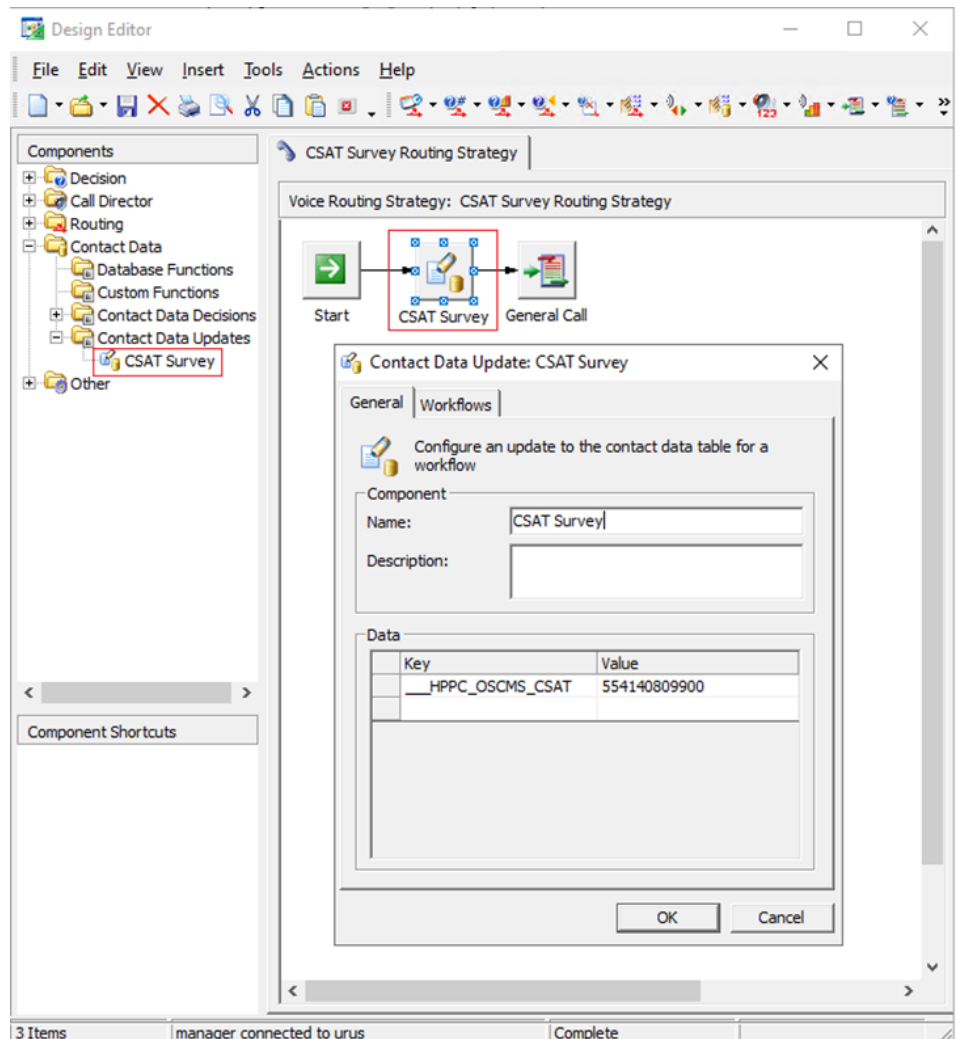


Figure 11: CSAT Survey Routing Strategy in Manager application

The **Contact Data Update** node can be used at the appropriate place in one or more Routing Strategy Workflows, before the **Enqueue** node. By configuring different CSAT Survey Pilot Numbers, it is possible to use multiple **Contact Data Update** nodes to transfer a call after termination to one of the CSAT Surveys configured.

If the CSAT Survey feature is integrated with OpenScope Contact Center Call Director, then it is possible to play a message in a **Menu Prompt** node to ask the caller whether to participate in a CSAT Survey. Subsequently, depending on the key pressed by the caller, the **Contact Data Update** node is used to create the required contact data if the caller accept to participate in the survey.

If the CSAT Survey feature is integrated with CMS Voice Portal or Third Party IVR, then in the IVR flow, the caller is asked to participate in the CSAT Survey,

the contact data is created and the queue for the call determined. In the OSCC Manager application, IVR transit Numbers must be configured to transfer the calls to OpenScape Contact Center for queuing and assignment to an agent.

For more information about the configuration steps, please refer to the OpenScape Contact Center Manager Administration Guide.

6.2.2 Configuring the Web Manager application

For the configuration of the Web Manager application, the Client Name and Token must be provided in the REST SDK section of OpenScape Contact Media Service.

Follow the steps below to configure the REST SDK settings:

- 1) Open the Web Manager application and navigate to the **REST SDK** tab.
- 2) In the **Clients** section, click the **+ Add REST SDK Client** button.
- 3) Add **Client Name** and **Client Token** in the corresponding fields

Client Name	Tenant	Client Token
restsdk	DEFAULT	dd730e0f62556bbefcd1433448dfdc8b

Figure 12: Configuring the Client Name and Token in REST SDK

NOTICE: If CSAT Survey is used in an OpenScape Contact Center Multitenancy environment and surveys need to run in multiple business units, then multiple CMS servers are needed. The reason for this is that the REST SDK configuration on the CMS server(see the [Configuring REST SDK](#) on page 18 chapter) is only possible for a single business unit.

For more information about the configuration, please refer to the OpenScape Contact Center Web Manager Administration Guide.

6.3 Communication Platforms

The CSAT Survey feature can be used with the following communication platforms:

- OpenScape Voice
- OpenScape 4000

6.3.1 OpenScape Voice

When using the OpenScape Voice platform, the CSAT Pilot Number can be a SIP Endpoint (trunk) or a subscriber number.

If the CSAT Survey feature uses a SIP Endpoint (trunk) number, it must be **Registered, Trusted** and must have the flag **Do not Audit Endpoint** enabled.

No special subscriber number configuration is needed if the CSAT Survey feature uses a Subscriber number to receive CSAT Survey inbound calls.

6.3.2 OpenScape 4000

When using the OpenScape 4000 platform, the CSAT Pilot Number must be a SIP Trunk.

If the CSAT Survey uses a SIP Trunk, the **Profile** used must be **Xpressions** and the **Gateway Basic System Settings** must have the flag **Allow SIP Register for Trunking** disabled.

A Subscriber number cannot be used as CSAT Extension as it does not accept parallel calls.

6.4 Third Party IVR

This solution uses one of the following interfaces:

- OpenScape Contact Center IVR application programming interface (API)
- OpenScape Contact Center VoiceXML interface

In case of integration with **Third Party IVR**, the IVR flow must be configured to allow the caller to participate in CSAT Survey and to use the proper contact data information for transferring the call to the Survey at the end of the contact.

The Contact Data must be created or updated in the IVR flow and must include the following content:

Key	Value
___HPPC_OSCMS_CSAT	<CSAT Survey Pilot Number>

NOTICE: The contact data key must have the following name:
___HPPC_OSCMS_CSAT (starting with three underscores).

For more information about Third Party IVR solutions, please refer to your service representative.

7 CSAT Survey Management and Administration

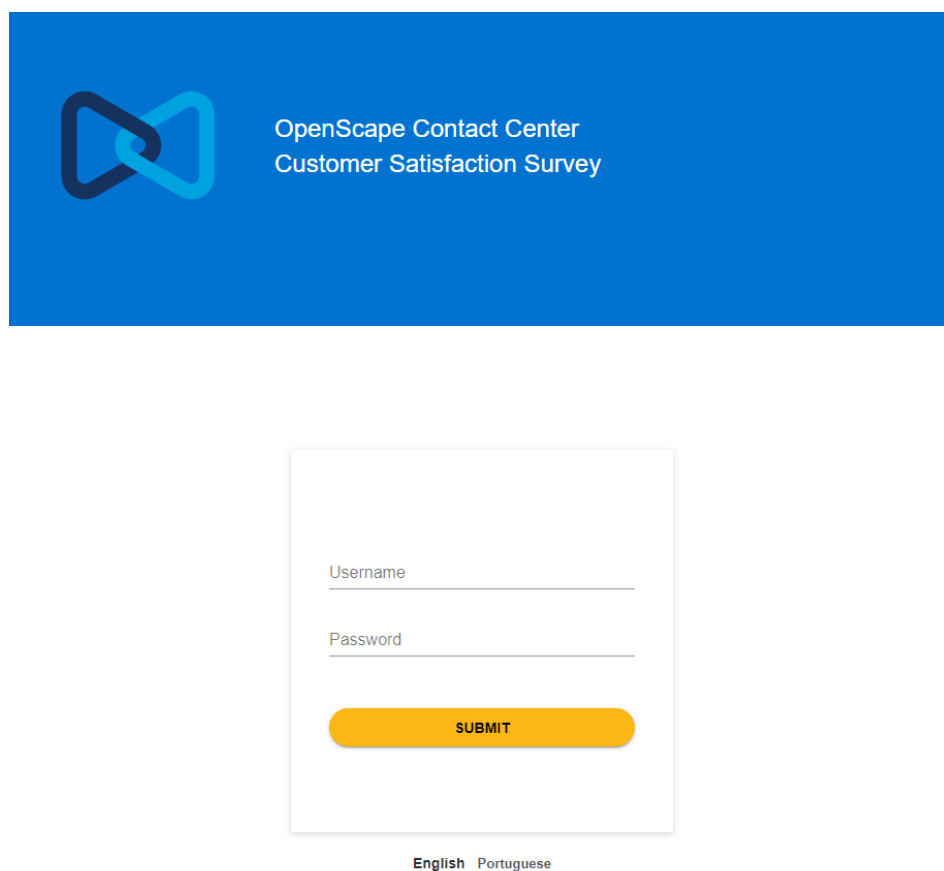
The CSAT Survey feature is managed and administrated using a web application, which is accessed via the OpenScape Contact Media Server, through port 9876, as displayed in the example below:

`https://<OSCC_ContactMediaServer_hostname_or_ip>:9876`

The Customer Satisfaction Survey web application can be used for:

- **CSAT Survey Access Management**
- **CSAT Survey Administration**

The authentication page allows the user to login and select the language in which the application is displayed.



The screenshot shows the authentication page for the OpenScape Contact Center Customer Satisfaction Survey. The page has a blue header with the OpenScape logo and the text "OpenScape Contact Center Customer Satisfaction Survey". Below the header is a white login form with fields for "Username" and "Password", a yellow "SUBMIT" button, and language selection links for "English" and "Portuguese".

Figure 13: CSAT Authentication page

The default credentials for authentication are the following:

- **User:** master
- **Password:** password

NOTICE: After the first login with the default user credentials, the password must be changed. This "master" user is the only user available for the first login.

7.1 CSAT Survey Access Management

Using the CSAT Survey Access Management page it is possible to manage survey users, survey groups, properties files for ASR and system parameters.

Logging in to the CSAT Survey Access Management page is possible only for users with the **CSAT Survey Master** or **CSAT Survey Group Manager** roles.

The administration permissions of each user depend on the role assigned. The users with the **CSAT Survey Master** role have access to all configurations, while the users with the **CSAT Survey Group Manager** role have access only to the Survey Users and Survey Groups.

The following user roles are available in the web application:

- **CSAT Survey Master** role

Users with this role are able to:

- Create, remove, update and view users.
- Manage passwords.
- Create, disable, update or display groups.
- Associate users and groups.
- Upload, download and delete Properties Files (ASR).
- Enable or disable the possibility to store individual agent statistics.

NOTICE:

No password policies are implemented.

The groups are not removed, but disabled.

- **CSAT Survey Group Manager**

Users with this role are able to:

- Create, remove, update, view, archive users and associate them in groups.
- Manage the user passwords of the groups for which he/she is responsible for.
- View groups.
- Enable or disable groups.

- **CSAT Survey Administrator**

Users with this role are able to:

- Create, remove, update and view surveys.
- Search, play and download recordings.
- Generate and view reports.

NOTICE: The CSAT Survey Administrator can assign surveys only to the groups for which he/she is responsible for.

- **CSAT Survey Supervisor**

Users with this role are able to:

- View surveys.
- Search, play and download recordings.
- Generate and view reports.

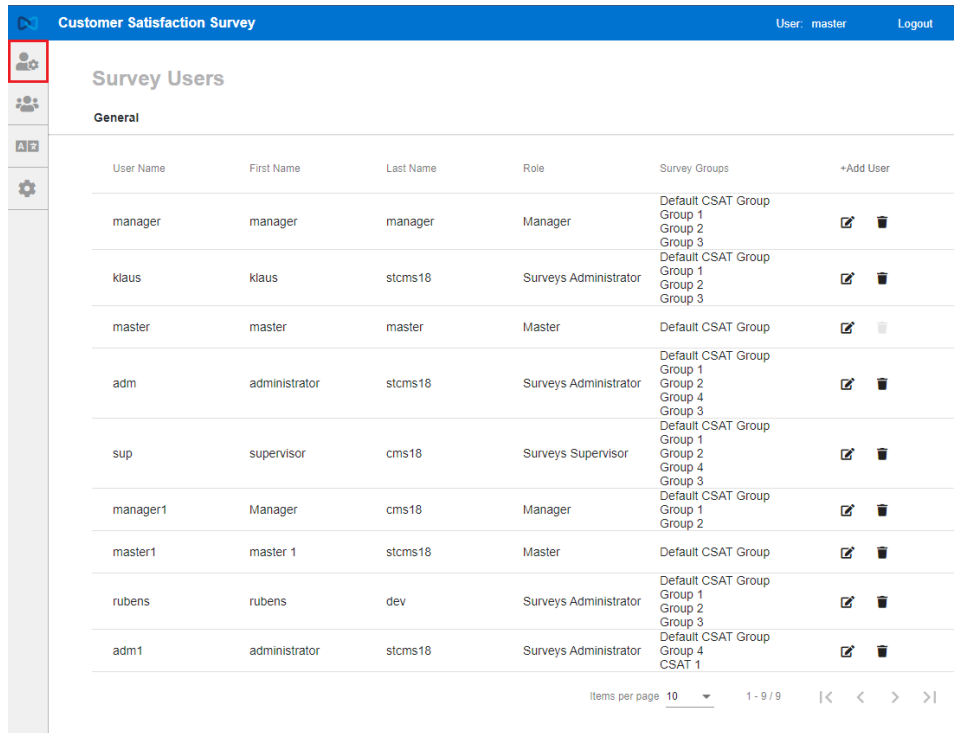
7.1.1 CSAT Survey User Management

The **CSAT Survey Users** section in the Customer Satisfaction Survey web application displays the list of survey users and their account information. Using this section, it is possible to add, edit or delete users from the list.

Follow the steps below to manage the survey users:

- 1) Open the Customer Satisfaction Survey web application and navigate to the **Survey Users** tab.
- 2) To add a new survey user:
 - a) Click **+ Add User** to open a new window for adding the user information.
 - b) Configure the following parameters for the new user:
 - Enter a user name to be user for user authentication in the **User Name** field.
 - Enter the password to be used for the user authentication in the **Password** field.
 - Enter the password again in the **Confirm Password** field.
 - Enter the first name of the user in the **First Name** field.
 - Enter the last name of the user in the **Last Name** field.
 - Choose the role you want to assign to the new user from the **Role** list. It is possible to choose between the following roles: Survey Supervisor, Survey Administrator, Manager and Master.
 - Select the group to which you want to add the new user from the **Survey Group** list.
- 3) To edit an existing survey user:
 - a) Locate the user you want to edit in the survey users list.
 - b) Click  to open a new window for editing the user information.
 - c) Edit the desired parameters.
- 4) To remove an user from the survey users list:
 - a) Locate the user you want to delete from the survey users list.
 - b) Click  to delete the user.

After deletion, the user is no longer displayed in the list of survey users.



User Name	First Name	Last Name	Role	Survey Groups	+Add User
manager	manager	manager	Manager	Default CSAT Group Group 1 Group 2 Group 3	
klaus	klaus	stcms18	Surveys Administrator	Default CSAT Group Group 1 Group 2 Group 3	
master	master	master	Master	Default CSAT Group	
adm	administrator	stcms18	Surveys Administrator	Default CSAT Group Group 1 Group 2 Group 4 Group 3	
sup	supervisor	cms18	Surveys Supervisor	Default CSAT Group Group 1 Group 2 Group 4 Group 3	
manager1	Manager	cms18	Manager	Default CSAT Group Group 1 Group 2	
master1	master 1	stcms18	Master	Default CSAT Group	
rubens	rubens	dev	Surveys Administrator	Default CSAT Group Group 1 Group 2 Group 3	
adm1	administrator	stcms18	Surveys Administrator	Default CSAT Group Group 4 CSAT 1	

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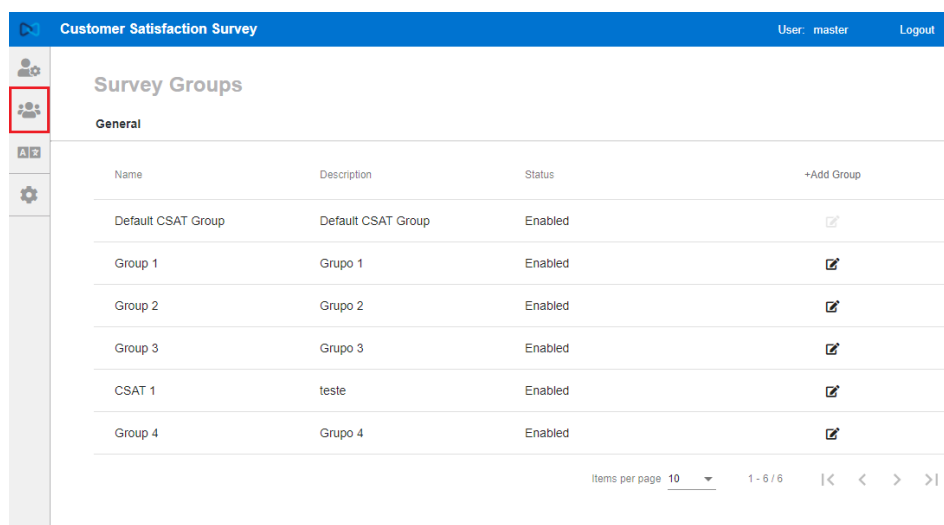
Figure 14: Working with survey users in the Customer Satisfaction Survey app

7.1.2 CSAT Survey Group Management

The **CSAT Survey Groups** section in the Customer Satisfaction Survey web application displays the list of survey groups and information about the group (Name, Description, Status). Using this section, it is possible to add, edit or delete survey groups.

Follow the steps below to manage the survey groups:

- 1) Open the Customer Satisfaction Survey web application and navigate to the **Survey Groups** tab.
- 2) To add a new survey user:
 - a) Click **+ Add Group** to open a new window for adding the group information.
 - b) Configure the following parameters for the new group:
 - Enter a name to identify the group in the **Group Name** field.
 - Enter details about the group in the **Description** field.
 - Click the **Status** check box to enable or disable the group.
- 3) To edit an existing survey group:
 - a) Locate the group you want to edit in the survey groups list.
 - b) Click to open a new window for editing the group information.
 - c) Edit the desired parameters.



Name	Description	Status	+Add Group
Default CSAT Group	Default CSAT Group	Enabled	
Group 1	Grupo 1	Enabled	
Group 2	Grupo 2	Enabled	
Group 3	Grupo 3	Enabled	
CSAT 1	teste	Enabled	
Group 4	Grupo 4	Enabled	

Figure 15: Working with survey groups in the Customer Satisfaction Survey app

7.1.3 CSAT Survey Properties Files Management

Properties files are used for language localization. It is necessary to upload such file for each language you wish to use.

In case of the ASR function, CSAT Survey uses the properties files to associate a recognized word (spoken by the caller) with a system value to allow further system processing.

In case of the TTS function, the properties files are used by the system to return a vocal message to the caller in the configured language.

The **ASR/TTS properties files** section in the Customer Satisfaction Survey web application displays the list of properties files uploaded to the app. Using this section, it is possible to upload a new property file and download or delete an existing property file.

Follow the steps below to manage the properties files:

- 1) Open the Customer Satisfaction Survey web application and navigate to the **Properties Files (ASR)**, which is also used for **TTS** purposes.
- 2) To upload a new properties file to the app:
 - Click **Browse** and select the files from your local storage.
- 3) To download an existing properties file:
 - a) Locate the properties file you want to download in the **Installed Files** list.
 - b) Click to download the desired file.
- 4) To remove an existing properties file:
 - a) Locate the properties file you want to remove in the **Installed Files** list.
 - b) Click to remove the desired file.
 - c) Confirm the deletion action in the confirmation dialog.

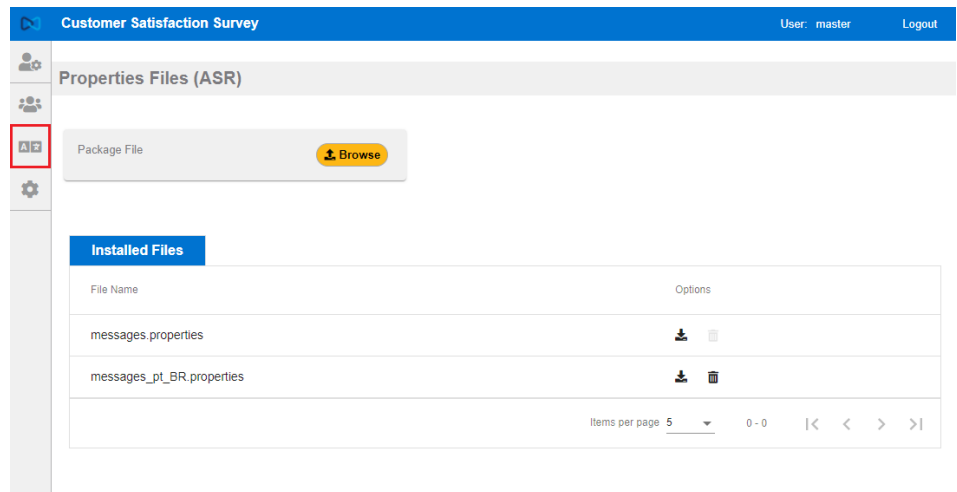


Figure 16: Working with properties file in the Customer Satisfaction Survey app

The properties files for English and Portuguese are installed by default on the system. For any additional languages to be used, the corresponding properties files must be created and uploaded to the app. The existing properties files can be downloaded from the app and used as an example for creating new ones. It is mandatory that all fields in a properties file are filled in.

The figure below displays an example of a properties file for English:

```

1 csat.language=English
2 csat.locale=en-US See supported locales table below
3 csat.yesno.yes=yes
4 csat.yesno.no=no
5 csat.digit.zero=zero
6 csat.digit.one=one
7 csat.digit.two=two
8 csat.digit.three=three
9 csat.digit.four=four
10 csat.digit.five=five
11 csat.digit.six=six
12 csat.digit.seven=seven
13 csat.digit.eight=eight
14 csat.digit.nine=nine
15 csat.digit.ten=ten
16 csat.digit.hash=hash
17 csat.digit.start=star
18 csat.messages.invalid-input=Invalid input
19 csat.messages.retry=Please, try again
20 csat.messages.error.transfer.ring-no-answer=Ring No Answer
21 csat.messages.error.transfer.canceled=Transfer Canceled
22 csat.messages.error.transfer.busy=Transfer Busy
23 csat.messages.error.transfer.failed=Transfer Failed
24 csat.messages.error.max-attempt-reached=The maximum number of attempts has been reached. You cannot keep responding this survey
25 csat.messages.error.csat-server-not-available=We are sorry. CSat Server is not available at this moment.
26 csat.messages.error.failed-to-process-question=We are sorry, but we could not process a survey question.
27 csat.messages.error.leaving-survey=Ok. Thanks for your time
28 csat.messages.error.language-not-supported=We are sorry. Survey language not supported
29 csat.messages.error.oscc-general-error=Could not transfer your call
30 csat.messages.error.not-available=Not available
31 csat.messages.record.confirm=When you are done, press hash to stop recording
32 csat.messages.record.listen=Do you want to listen your response before storing it?
33 csat.vords.welcome=Welcome
34 csat.vords.for=For
35 csat.vords.from=From
36 csat.vords.to=to
37 csat.vords.or=or
38 csat.vords.and=and
39 csat.vords.not=not
40 csat.vords.ok=OK
41 csat.vords.press=Press
42 csat.vords.pressed=Pressed
43 csat.vords.cancel=Cancel
44 csat.vords.canceled=Canceled
45 csat.vords.start=Start
46 csat.vords.started=Started
47 csat.vords.stop=Stop
48 csat.vords.stoped=Stoped
49 csat.vords.answer=Answer
50 csat.vords.answered=Answered
51 csat.vords.leaving=Leaving
52 csat.vords.survey=Survey
53 csat.vords.digit=digit
54 csat.vords.number=number

```

Figure 17: Properties file for English

The file contains the key element displayed on the left side of the equal sign and its value in the language of the properties file, displayed on the right side of the equal sign. When creating a new properties file using an existing one downloaded from the app, it is necessary to change only the value fields.

The supported locale values are displayed in the following table:

Locale	Language-Country
en-US	English-United States
pt-BR	Portuguese-Brazil
de-DE	Deutsch-Deutschland
en-GB	English-Great Britain
es-ES	Spanish-Spain
fr-FR	French-France
it-IT	Italian-Italy
ko-KR	Korean-Korea
nl-NL	Dutch-Netherlands
pl-PL	Polish-Poland
ro-RO	Romanian-Romania
ru-RU	Russian-Russia
zh-CN	Chinese-China

Table 2: Supported locale values

The file name for a new language properties file must have the following format:

`messages_<language>_<COUNTRY>.properties`

Example: `messages_de_DE.properties`

7.1.4 CSAT Survey System Parameters Management

The **System parameters** section in the Customer Satisfaction Survey web application allows to enable or disable the **Store Individual Agent Statistics** option.

The default value of the **Store Individual Agent Statistics** option is **Yes**. If this option is set to **No**, no agent data is stored and the statistics are stored anonymously.

NOTICE: Depending on legal requirements, for certain countries (e.g. countries of the European Union) this flag must be set to **No**.

NOTICE: If this flag is set to **No** after agent data has already been stored under the flag **Yes**, then this data will not be deleted.

The screenshot shows the 'Customer Satisfaction Survey' application interface. At the top, there is a blue header bar with the title 'Customer Satisfaction Survey' and user information 'User: master' and 'Logout'. Below the header, a sidebar on the left contains icons for users, a 'System parameters' section, and a 'Save' button. The main content area is titled 'System parameters' and contains three sections: 'Voice Recognition' with a 'Voice recognition confidence level' input field set to 50; 'Agent Statistic' with a 'Store individual Agent Statistic' toggle set to 'Yes'; and 'Password Policy' with several checkboxes for password requirements (Minimum Password Length: 8, Maximum Password Length: 25, Must include at least one upper case character, Must include at least one lower case character, Must include at least one digit, Must include at least one special characters, Repetition not allowed).

Figure 18: Working with system parameters in the Customer Satisfaction Survey app

7.2 CSAT Survey Administration

Using the CSAT Survey Management page it is possible to manage and configure surveys, recorded audio files and reports.

Logging in to the CSAT Survey Management page is possible only for users with the **CSAT Survey Administrator** or **CSAT Survey Supervisor** roles. The users with the **CSAT Survey Administrator** role have access all configurations, while the users with the **CSAT Survey Supervisor** role have only read-only rights.

When a user logs in to the CSAT Survey Management page, the following conditions are verified:

- If the Nuance voice packages are consistent with the configured surveys.
- If the extensions associated with surveys are configured in CMS.

If the conditions are not fulfilled, a warning message is displayed to the user indicating the cause of the problem.

7.2.1 CSAT Survey Configuration

The **CSAT Survey Configuration** area in the Customer Satisfaction Survey web application, displays a list with the following data about surveys:

- **Name:** unique name to identify the survey.
- **Production:** indication that the survey is in **Production** state, when green or not when red.
- **Archive:** indication that the survey is archived, when green or not when red.
- **Number of questions:** the number of questions in the survey.

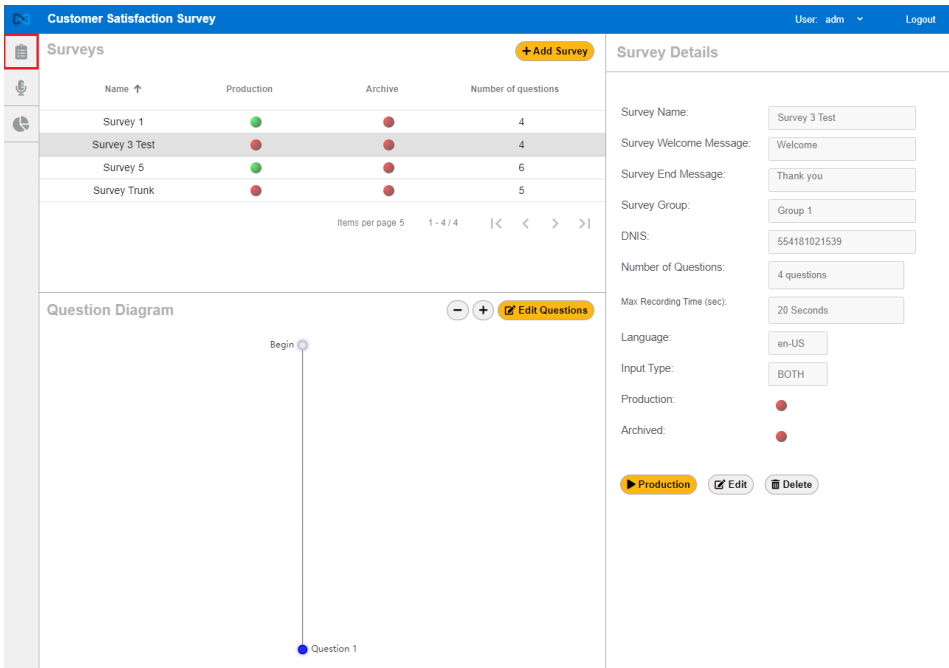


Figure 19: Using the Surveys tab

Using the **CSAT Survey Configuration** area, it is possible to add a new survey, view details of existing surveys, add questions to existing surveys and view question diagrams.

Follow the steps below to manage surveys:

- 1) Open the Customer Satisfaction Survey web application and navigate to the **Surveys** area.

2) To add a new survey:

- a) Click **+ Add Survey** to open a new window for creating a new CSAT survey.
- b) Configure the following parameters for the survey:
 - Enter a name to uniquely identify the survey in the **Survey Name** field.
 - Enter a welcome message to be played at the beginning of the survey in the **Survey Welcome Message** field.
This step is optional.
 - Enter an ending message to be played at the end of the survey in the **Survey End Message** field.
This step is optional.
 - Add the survey group for which the survey will be used in the **Survey Group** area.
 - Set the value for **Max Recording Time (sec)** for the open questions.
 - Enter the **Transfer Number** for accessing the survey in the **DNIS** area.
This is a combo box with the configured extensions that are not assigned to other surveys yet.
 - Enter the input type in which the caller must provide answers to the survey questions in the **Input type** field.
The options available are: DTMF (key press), Speech or both.
 - Select the survey language for the TTS and ASR packages, in the **Language** area.

3) To view details of existing surveys:

- a) Locate and select the survey for which you want to display details in the list of existing surveys.
- b) The details of the selected survey will be displayed on the right side of the screen, in the **Survey Details** panel.

This panel allows for:

- Viewing survey details
- Deleting the selected survey, by clicking **Delete**
- Editing the selected survey, by clicking **Edit**
- Changing the state of the selected survey to **Production** or **Archive**

NOTICE:

It is not possible to edit a survey in the **Production** state. Surveys that are in this state can only be archived.

When a survey is archived, the associated **Transfer Number** can be reused by another survey.

It is only possible to delete a draft survey, that is not in **Production** state yet.

- 4) To add new questions to an existing survey or to view to currently added questions:
- a) Locate and select the survey to which you want to add questions, in the list of existing surveys. The available options are displayed under the list of surveys.

NOTICE:

The **+ Add Questions** option is displayed only if the survey selected is not in **Production** state.

For surveys in the **Production** state, only the **View Questions** option is displayed, as it is not possible to edit any details of the surveys that are in this state.

- b) Click **+ Add Questions** to add new questions to a survey that is not in the **Production** state.

A new window opens. Configure the following parameters to add new questions:

- Add a title for the new question in the **Question title** field.
- Select the question type in the **Question type** area.

The possible type are:

Yes / No: it can be mapped when pressing the "0" / "1" keys.

Open Questions: a .wav file with the caller's answer will be recorded.

Scale: the possible values are defined in a scale from 0 to 10.

Net Promoter Score: by definition, the scale must be from 0 to 10.

- Add the content of the question in the **Question content** field.

Finally, save the question to the selected survey, by clicking **Save**.

If you wish to cancel the question addition, click **Cancel**.

NOTICE:

For Open Question, it is not possible for the caller to listen back and confirm the recorded message.

The caller input for the survey questions can be provided via DTMF or Speech, depending on the survey configuration. This excepts the Open Question.

In case of DTMF detection, it is possible to use values in the range of 0 to 10 to rate a question. If the caller presses "1", it is possible that he/she stops there and rates a question with 1 or, after pressing "1", he/she presses "0" as well to rate the question with 10. Therefore, if the caller

wishes to rate a question with 1, he/she must wait 5 seconds for the rating operation to be completed.

The screenshot shows the 'Customer Satisfaction Survey' interface. At the top, there's a 'Survey Info' section with fields for Survey Name (Survey 1), Max Recording Time (sec) (25), Survey Welcome Message (Seja bem vindo), Survey End Message (Até logo), and Language (pt-BR). Below this is the 'Survey Builder' section. It contains two question cards, 'No. 1' and 'No. 2'. Card 'No. 1' has a question title 'pergunta 1', question type 'Yes / No', question content 'Pergunta Sim ou Não. Digite 1 para continuar ou 2 para encerrar.', and two options: 'Option: Yes (DTMF #1)' and 'Option: No (DTMF #2)'. Card 'No. 2' has a question title 'pergunta 2', question type 'Net Promoter Score', question content 'Digite de 0 a 10 para dar sua nota', and a next question 'Question 3'. There are '+ Add Question', 'Save', and 'Cancel' buttons at the top right of the Survey Builder section.

Figure 20: Adding a new question to an existing survey

- c) To view questions of existing surveys that are in the **Production** state, use the **Question Diagram** area.

This area can be expanded or collapsed, by clicking the **+** or **-** buttons, displayed on the upper right side of the **Question Diagram** panel.

This area also displays the flow of questions the selected survey. All branches in the question diagrams must terminate with **End**.

Question Diagram

[-] [+] [Edit Questions]

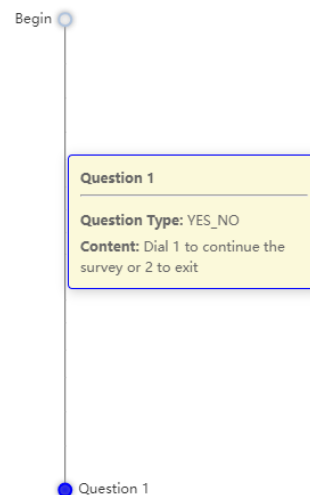


Figure 21: Viewing Question Diagrams

7.2.2 CSAT Survey using Custom Audio Files

From OpenScape Media Service V12 onwards it is possible to upload wave files to be used in the CSAT Survey questions without the need of using TTS licenses.

The instructions bellow shows how configure the CSAT Surveys questions to use wave files.

Configuring the Custom Audio Files

In the Customer Satisfaction Survey UI, access the Custom Audio Files section. In this section all available Custom Audio Files will be listed.

Customer Satisfaction Survey

UserMasterLogout

Custom Audio Files

General

Name	Description	File name	Survey Groups	State	W3C Custom Audio File
teste 1 editad	teste 1 de arquivo (master) 2	test1-8.wav	Default CSAT Group Group #1 Group #4	In use	  
Welcome Message	A welcome message	welcome_audio.wav	Default CSAT Group Group #4 Group #3	In use	  
Goodbye Message	A goodbye message	goodbye_message.wav	Default CSAT Group Group #4	In use	  
16-bit test	Testing the 16-bit depth	test-16b.wav	Default CSAT Group Group #1 Group #2 Group #4 Group #5 Group #3	In use	  
teste 3	teste 3 de arquivo admin	test1-8-03.wav	Group #1 Group #2	In use	  

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NOTICE:

The Custom Audio Files section is available only to Survey Master and Survey Administrator users.

For Survey Master users, all audio files on the OSCMS system will be listed.

For Survey Administrator users, only audio files configured to the Survey Groups to which they belong will be listed.

In the Custom Audio Files section, a user is able to edit, delete and playback the available Custom Audio Files and add new Custom Audio Files.

IMPORTANT: Custom audio files with state IN USE cannot be deleted.

When changing the Survey Groups to which a Custom audio file is available, groups associated with surveys using this audio file cannot be removed.

Configuring the Audio System Messages

In the Customer Satisfaction Survey UI, access the System Parameters section. In this section it is possible to chose the type of playback of System Messages (Text to speech or Audio Messages).

The screenshot shows the 'Customer Satisfaction Survey' interface. On the left is a sidebar with icons for various settings. The main area is titled 'System parameters' and contains several sections: 'Voice Recognition' (with a 'Voice recognition confidence level' input set to 40), 'Agent Statistic' (with a 'Store individual Agent Statistic' toggle set to 'Yes'), and 'Password Policy' (with fields for 'Minimum Password Length' (8), 'Maximum Password Length' (25), and checkboxes for password requirements). The 'System Messages' section is highlighted with a red box and contains a 'System messages playback type' dropdown menu with 'Text to speech' and 'Audio messages' options.

Access the Audio System Messages section

In this section, a user is able to delete and playback the available Audio System Messages and upload new Audio System Messages.

The screenshot shows the 'Audio System Messages' section of the 'Customer Satisfaction Survey' interface. It has a 'General' tab. Below the tab, there is a list of audio messages with their corresponding playback types and actions. The 'Audio System Messages' section is highlighted with a red box. The messages listed are: 'Invalid input / Retry audio message', 'Maximum attempts reached audio message', 'Confirm recording audio message', and 'Failed to process question audio message'. Each message has a 'Browse' button, a 'Delete' button, and a 'Play' button. The 'Confirm recording audio message' has a 'very_long_speech.wav' file associated with it.

NOTICE:

The System Parameters and Audio System Messages sections are available only to Survey Master users.

Configuring Surveys to use Custom Audio Files

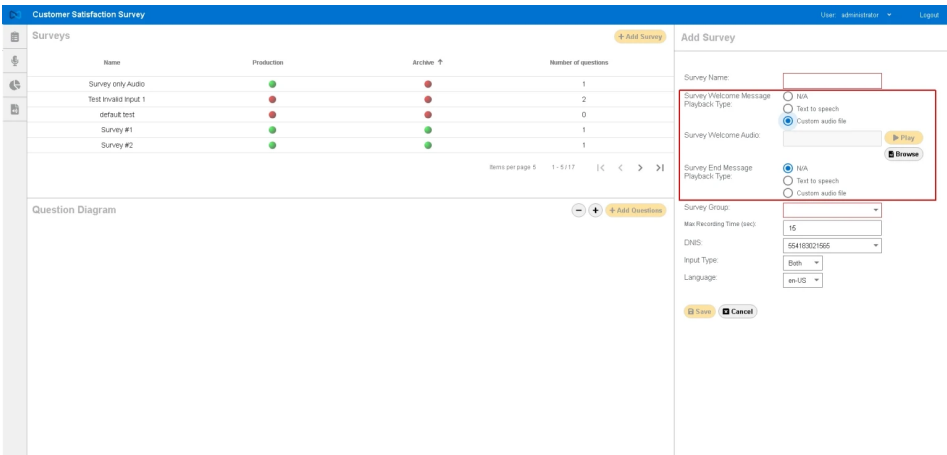
In the Customer Satisfaction Survey UI, access the Surveys section.

NOTICE:

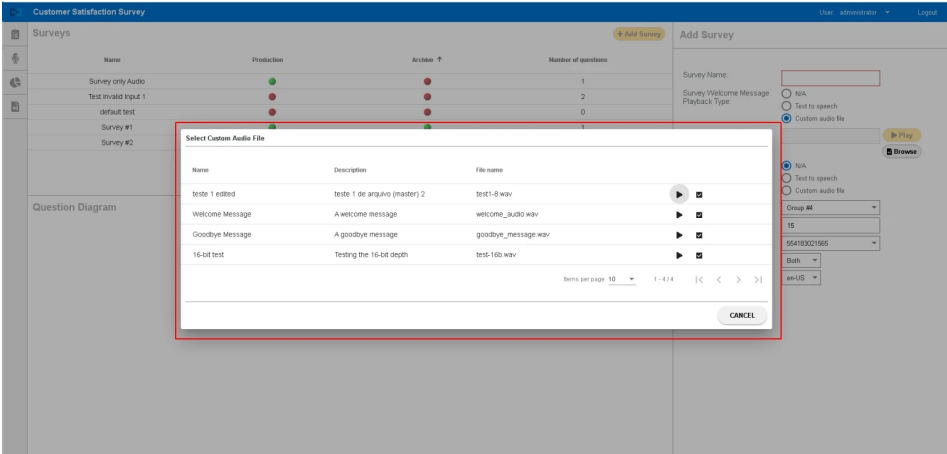
The Surveys section with permission to configure surveys is available only to Survey Administrator users.

When adding or editing a Survey, it is possible to choose the playback type of the Welcome and End messages. Select Custom Audio File to use audio files to reproduce these messages and not need available TTS licenses.

CSAT Survey Management and Administration

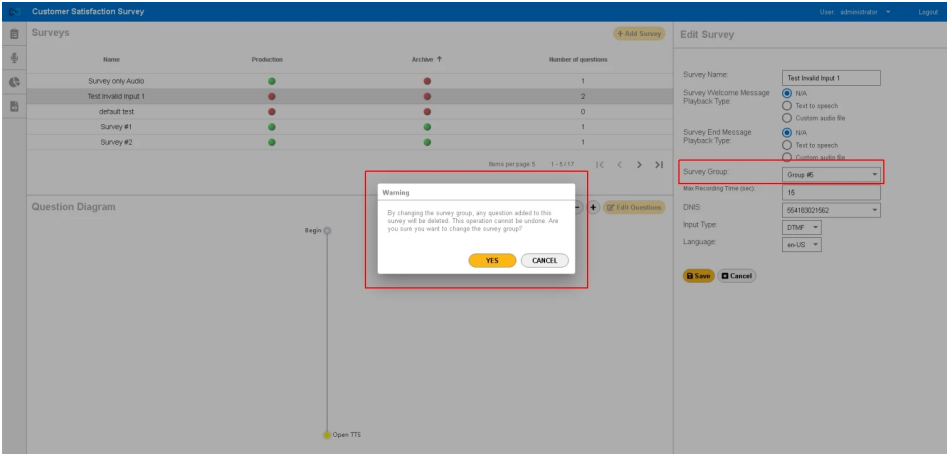


By clicking the Browse button, a modal window opens listing the Custom Audio Files available for the selected Survey Group. User is able to play each file before selecting one.



By changing the selected Survey Group of a Survey, a modal window opens warning the user that any configured Questions will be deleted. Any selected Welcome and End audio messages also will be cleared.

This ensures that a Custom Audio File that does not belong to the selected Survey Group is not configured in the Survey.



IMPORTANT:

Available Custom audio files are associated with Survey Groups. By changing a Survey Group, we need to somehow ensure that the selected Custom audio files are available to the new selected Survey Group.

CSAT Custom audio files feature will only support uncompressed PCM encoded WAVE files. Audio files uploaded to the system must meet the following requirements:

- WAV file format
- Sample rate: 16kHz
- Bit depth: 16-bits
- Mono channel
- Maximum duration: 1 minute (1875kB file size)

NOTICE:

When configuring a Survey, set the Input Type to DTMF to avoid needing available ASR licenses.

When adding or editing Questions, it is possible to choose the playback type of the Question. Select Custom Audio File to use audio files and not need available TTS licenses.

By clicking the Browse button, as well as for the Welcome and End messages, a modal window opens listing the Custom Audio Files available for the selected Survey Group. User is able to play each file before selecting one.

NOTICE:

- The default input timeout is **15 seconds**. If your custom audio file exceeds this duration, playback will restart.
- To extend the timeout, modify the `input_timeout` value in the CSAT database (see [Configuring the CSAT database](#) on page 16).

7.2.3 CSAT Survey Recording Files

The **Recording Files** section in the Customer Satisfaction Survey web application allows for searching and playing the audio files recorded for CSAT Survey open questions.

Follow the steps below to use the **Recording Files** tab:

- 1) Open the Customer Satisfaction Survey web application and navigate to the **Recording Files** tab.
- 2) To search for recording files:
 - a) Fill in the search criteria with the following information:
 - **Survey**: the unique name that identifies the survey
 - **ANI**: unique identifier for the caller who participated in the survey
 - **Start Date**: the search interval that indicates the start date and time
 - **End Date**: the search interval that indicates the end date and time
 - **Search recordings**: the recordings search procedure
 - **Clean**: option to clear the search criteria and search results
 - b) Click **Search Recordings** to start searching for recording files using the search criteria defined.
 - c) If any recording files correspond with the search criteria defined, the search results are displayed in the **Search Results** area.

The **Search Results** area displays the following information:

- **File Name**: unique identifier for the recorded audio file
- **Survey Name**: unique identifier for the survey
- **Group Name**: unique identifier for the survey group
- **Start Date**: date and time when the audio file was recorded
- **ANI**: the caller number who participated in the survey

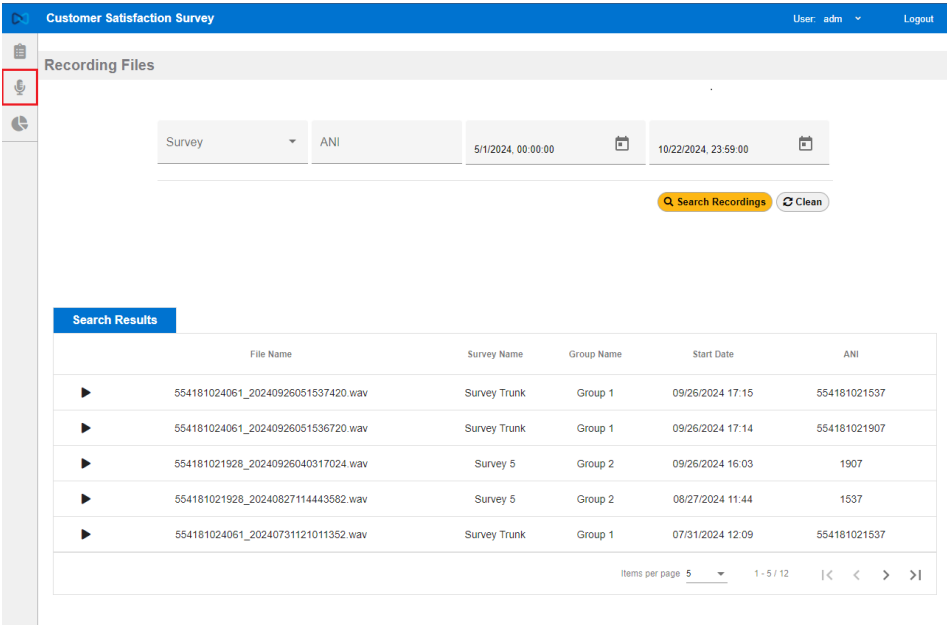


Figure 22: Using the Recording Files tab

7.2.4 CSAT Survey Reports

The **Survey Reports** section in the Customer Satisfaction Survey web application allows for accessing survey results and for creating, viewing and modifying survey reports.

Follow the steps below to use the **Survey Reports** tab:

- 1) Open the Customer Satisfaction Survey web application and navigate to the **Survey Reports** tab.
- 2) To generate a report, configure the parameters in the **Report Options** area.
 - a) Select the report type you want to generate from the **Report Type** drop-down menu.

The possible options are displayed in the following figure.

The screenshot shows the 'Customer Satisfaction Survey' web application interface. At the top, there is a blue header bar with the application name, a user dropdown menu showing 'User: adm', and a 'Logout' button. Below the header, a sidebar contains icons for a clipboard, a microphone, and a pie chart. The 'Survey Reports' tab is selected, and the 'Report Options' form is displayed. The form includes a 'Report Type' dropdown menu with the following options: 'Survey Summary Report', 'Agent Compliance Report', 'NPS Report', and 'Survey Per Question'. To the right of the dropdown is a yellow 'Generate Report' button. Below the dropdown, there are fields for 'Start Date' (9/18/2024) and 'End Date' (10/18/2024), each with a calendar icon. Below these is a 'Select an Agent ID' dropdown menu with 'All Agents' selected. At the bottom, there are radio buttons for 'Daily' (selected) and 'Monthly'.

Figure 23: Options available for the Report Type

Survey Summary: this report shows the result for each question of a survey on a timely basis. The survey can be generated for one specific agent or for all agents.

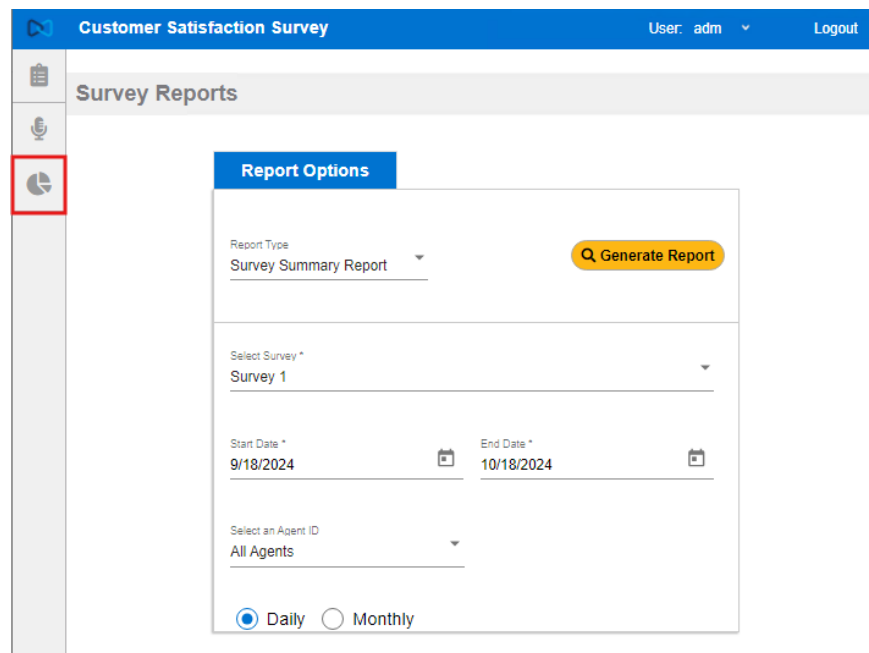
Agent Compliance: this report shows the deviation in the results of an agent, compared to the average result of the group of agents. The **Average Surveys Per Agent** value comes from the total **Count** divided by **Total Agents**. The **Deviation** value comes from the difference between a specific agent and the average.

NPS (Net Promoter Score): this report shows the general result of the survey. Net Promoter Score is calculated by subtracting the percentage of callers who responded 0 - 6 (the Detractors) from the percentage of those

who responded 9 - 10 (the Promoters). The result is a raw value and not a percentage.

Survey per Question: this report shows the detailed result per survey question. The report can be generated for one specific agent or for all agents.

The example below shows a report on a daily basis for all agents.



The screenshot shows the 'Customer Satisfaction Survey' application interface. The top navigation bar includes the application name, user information ('User: adm'), and a 'Logout' link. The left sidebar contains icons for various functions, with the 'Reports' icon (a pie chart) highlighted by a red box. The main content area is titled 'Survey Reports' and contains a 'Report Options' panel. This panel includes a 'Report Type' dropdown set to 'Survey Summary Report', a 'Select Survey' dropdown set to 'Survey 1', 'Start Date' and 'End Date' fields set to '9/18/2024' and '10/18/2024' respectively, a 'Select an Agent ID' dropdown set to 'All Agents', and radio buttons for 'Daily' (selected) and 'Monthly' report frequencies. A yellow 'Generate Report' button is located at the top right of the panel.

Figure 24: Example of a daily basis report for all agents

- b) Select the survey to be used in the report from the **Select Survey** drop-down menu.
- c) Set the time interval for generating the report in the **Start Date** and **End Date** areas.
- d) Select the agent/agents for whom you want to generate a report from the **Select an Agent ID** drop-down menu.

If the **Store individual Agent Statistics** option is set to **No** (see chapter [CSAT Survey System Parameters Management](#) on page 30), then the only available option is **All Agents**. In this case, the reports do not show individual statistics.

To generate reports for a specific agent, the **Store individual Agent Statistics** option needs to be set to **Yes**.

- e) Define how to group statistics in the report, by enabling the **Daily** or **Monthly** options.
- 3) Click **Generate Report** to see the report according to the parameters configured in the previous step.

8 CSAT Report Examples

This chapter provides examples of CSAT reports that can be generated using the Customer Satisfaction Survey web application.

8.1 Survey Summary Report Examples

This chapter presents several types of **Survey Summary Reports**.

Example 1

This example presents a **Survey Summary Report** where the results are displayed on a **Daily** basis for **All Agents**.

Report Options

Report Type
Survey Summary Report

Select Survey *
Survey 1

Start Date *
9/18/2024

End Date *
10/18/2024

Select an Agent ID
All Agents

☒ Daily ☐ Monthly

Generate Report

Figure 25: Example 1: Survey Summary Report with results displayed on a daily basis, for all agents

With this configuration, the report results are the following:

Survey Summary (Daily)						
Interval: 18/09/2024 - 18/10/2024			Survey: Survey 5			
Agent: All agents			Group: Group 2			
			Language: en-US			
Date	Question 1 Yes/No	Question 2 Scale	Question 3 NPS	Question 4 Yes/No	Question 5 NPS	Question 6 Open
09/26/2024	Yes(3) No(1)	Avg(4.67)	NPS(-33%)	Yes(2) No(1)	NPS(50%)	Count(1)

Figure 26: Survey Summary Report for Example 1

Example 2

This example presents a **Survey Summary Report** where the results are displayed on a **Monthly** basis for **All Agents**.

Report Options

Report Type
Survey Summary Report

Generate Report

Select Survey *

Survey 5

Start Date *

9/18/2024

End Date *

10/18/2024

Select an Agent ID

All Agents

☐ Daily

☒ Monthly

Figure 27: Example 2: Survey Summary Report with results displayed on a monthly basis, for all agents

With this configuration, the report results are the following:

Survey Summary (Monthly)						
Interval: 18/09/2024 - 18/10/2024			Survey: Survey 5			
Agent: All agents			Group: Group 2			
			Language: en-US			
Date	Question 1 Yes/No	Question 2 Scale	Question 3 NPS	Question 4 Yes/No	Question 5 NPS	Question 6 Open
09/2024	Yes(3) No(1)	Avg(4.67)	NPS(-33%)	Yes(2) No(1)	NPS(50%)	Count(1)

Figure 28: Survey Summary Report for Example 2

Example 3

This example presents a **Survey Summary Report** where the results are displayed on a **Daily** basis for a **specific agent**.

Report Options

Report Type
Survey Summary Report

Generate Report

Select Survey *
Survey 5

Start Date *
9/2/2001

End Date *
10/18/2024

Select an Agent ID
8

☒ Daily

☐ Monthly

Figure 29: Example 3: Survey Summary Report with results displayed on a daily basis, for a specific agent

With this configuration, the report results are the following:

Survey Summary (Daily)						
Interval: 02/09/2001 - 18/10/2024			Survey: Survey 5			
Agent: ID:8			Group: Group 2			
			Language: en-US			
Date	Question 1 Yes/No	Question 2 Scale	Question 3 NPS	Question 4 Yes/No	Question 5 NPS	Question 6 Open
04/05/2023	Yes(1) No(1)	Avg(7.00)	NPS(-100%)	Yes(1) No(0)	NPS(0%)	Count(1)
05/02/2023	Yes(1) No(0)	Avg(0.00)	NPS(-100%)	Yes(1) No(0)	NPS(-100%)	
05/10/2023	Yes(2) No(0)	Avg(3.00)	NPS(-50%)	Yes(1) No(1)	NPS(100%)	
05/19/2023	Yes(1) No(0)	Avg(6.00)	NPS(0%)	Yes(0) No(1)	NPS(0%)	
06/12/2023	Yes(1) No(1)	Avg(6.00)	NPS(0%)	Yes(0) No(1)	Count(1)	

Figure 30: Survey Summary Report for Example 3

Example 4

This example presents a **Survey Summary Report** where the results are displayed on a **Monthly** basis for a **specific agent**.

Report Options

Report Type
Survey Summary Report

Generate Report

Select Survey *

Survey 5

Start Date *

9/2/2001

End Date *

10/18/2024

Select an Agent ID

8

☐ Daily

☒ Monthly

Figure 31: Example 4: Survey Summary Report with results displayed on a monthly basis, for a specific agent

With this configuration, the report results are the following:

Survey Summary (Monthly)						
Interval: 02/09/2001 - 18/10/2024			Survey: Survey 5			
Agent: ID:8			Group: Group 2			
			Language: en-US			
Date	Question 1 Yes/No	Question 2 Scale	Question 3 NPS	Question 4 Yes/No	Question 5 NPS	Question 6 Open
04/2023	Yes(1) No(1)	Avg(7.00)	NPS(-100%)	Yes(1) No(0)	NPS(0%)	Count(1)
05/2023	Yes(4) No(0)	Avg(3.00)	NPS(-50%)	Yes(2) No(2)	NPS(0%)	
06/2023	Yes(7) No(4)	Avg(5.29)	NPS(43%)	Yes(3) No(4)	Count(4)	NPS(0%)
07/2023	Yes(4) No(0)	Avg(5.50)	NPS(-50%)	Yes(4) No(0)	NPS(25%)	
08/2023	Yes(1) No(0)	Avg(7.00)	NPS(100%)	Yes(1) No(0)	NPS(-100%)	

Figure 32: Survey Summary Report for Example 4

8.2 Agent Compliance Report Example

This chapter presents an example of an **Agent Compliance Report**.

Report Options

Report Type

Agent Compliance Report

Generate Report

Select Survey *

Survey 5

Start Date *

9/2/2001

End Date *

10/18/2024

Figure 33: Agent Compliance Report Example

With this configuration, the report results are the following:

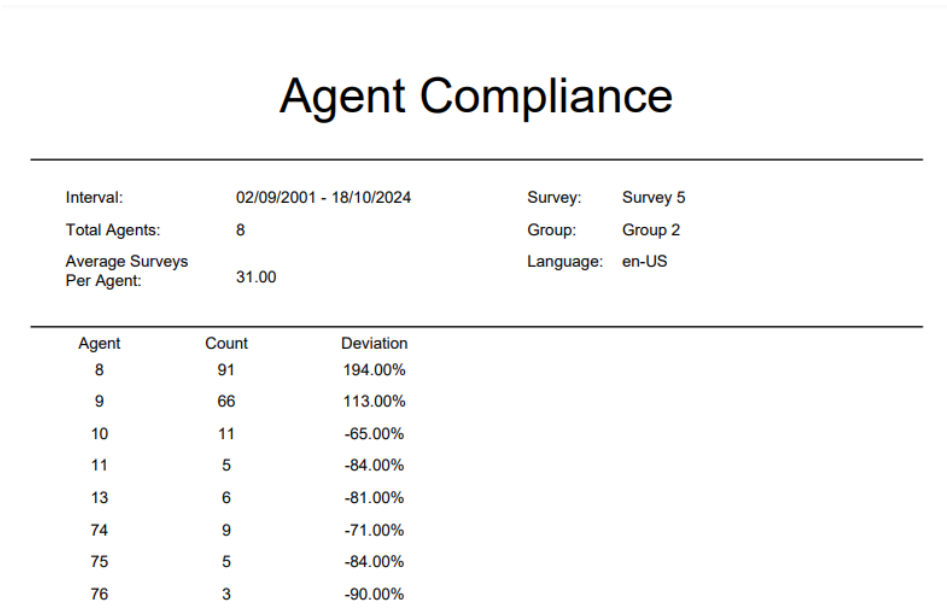


Figure 34: Agent Compliance Report

8.3 NPS Report Examples

This chapter presents several types of **NPS Reports** (Net Promoter Score Reports).

Example 1

This example presents a **NPS Report** where the results are displayed on a **Daily** basis for **all agents**.

Report Options

Report Type

NPS Report

Generate Report

Select Survey *

Survey 5

Start Date *

9/2/2001

End Date *

10/18/2024

Select NPS Question

question 3

Select an Agent ID

All Agents

☒ Daily

☐ Monthly

Figure 35: Example 1: NPS Report with results displayed on a daily basis, for all agents

With this configuration, the report results are the following:

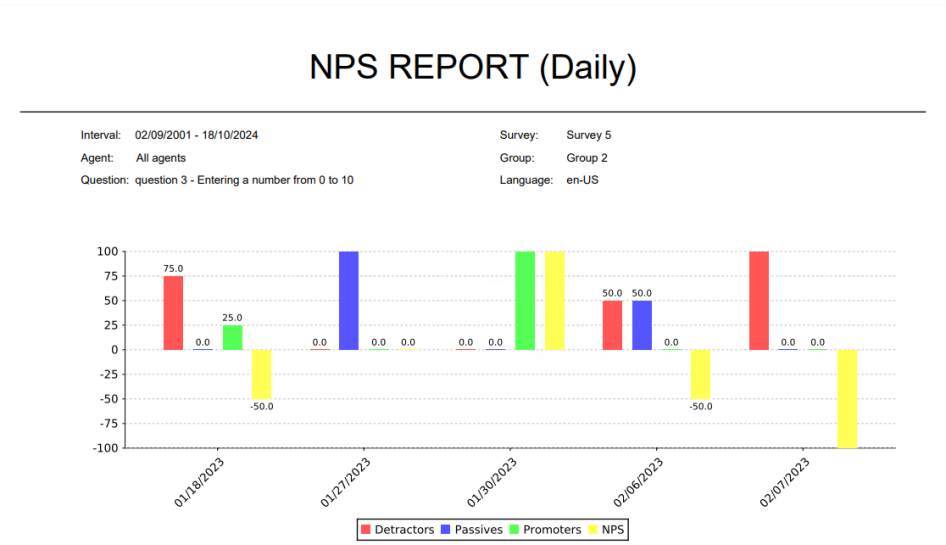


Figure 36: Report results for Example 1

Example 2

This example presents a **NPS Report** where the results are displayed on a **Monthly** basis for **all agents**.

Report Options

Report Type

NPS Report

Generate Report

Select Survey *

Survey 5

Start Date *

9/2/2001

End Date *

10/18/2024

Select NPS Question

question 3

Select an Agent ID

All Agents

☐ Daily

☒ Monthly

Figure 37: Example 2: NPS Report with results displayed on a monthly basis, for all agents

With this configuration, the report results are the following:

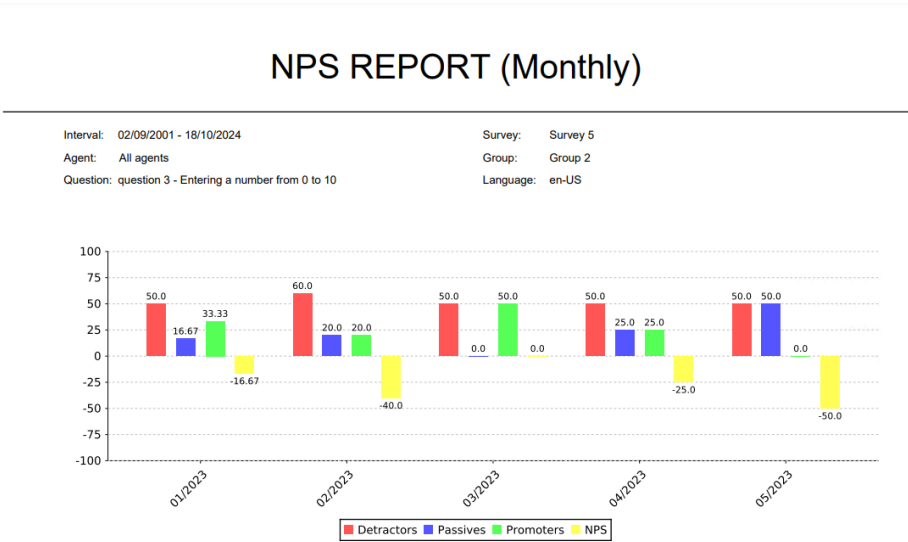


Figure 38: Report results for Example 2

Example 3

This example presents a **NPS Report** where the results are displayed on a **Daily** basis for a **specific agent**.

Report Options

Report Type

NPS Report

Generate Report

Select Survey *

Survey 5

Start Date *

9/2/2001

End Date *

10/18/2024

Select NPS Question

question 3

Select an Agent ID

8

☒ Daily

☐ Monthly

Figure 39: Example 3: NPS Report with results displayed on a daily basis, for a specific agent

With this configuration, the report results are the following:

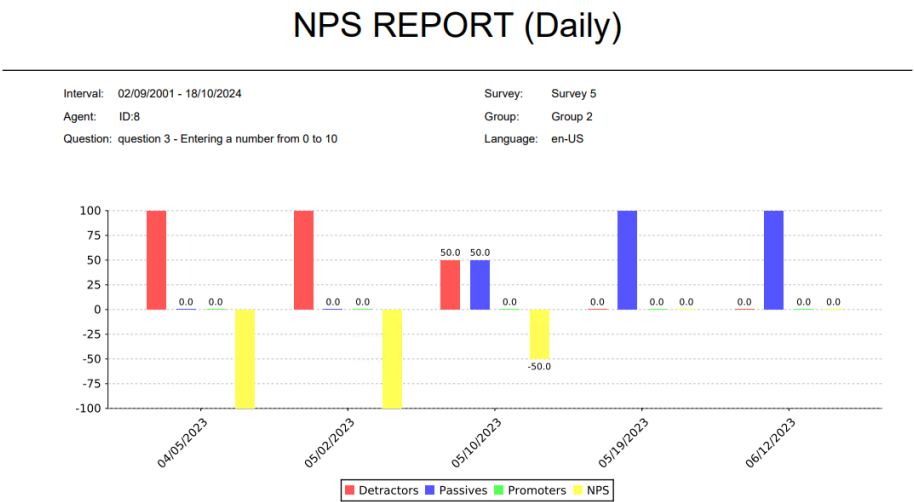


Figure 40: Report results for Example 3

Example 4

This example presents a **NPS Report** where the results are displayed on a **Monthly** basis for a **specific agent**.

Report Options

Report Type
NPS Report

Generate Report

Select Survey *
Survey 5

Start Date *
9/2/2001

End Date *
10/18/2024

Select NPS Question
question 3

Select an Agent ID
8

☐ Daily

☒ Monthly

Figure 41: Example 4: NPS Report with results displayed on a monthly basis, for a specific agent

With this configuration, the report results are the following:

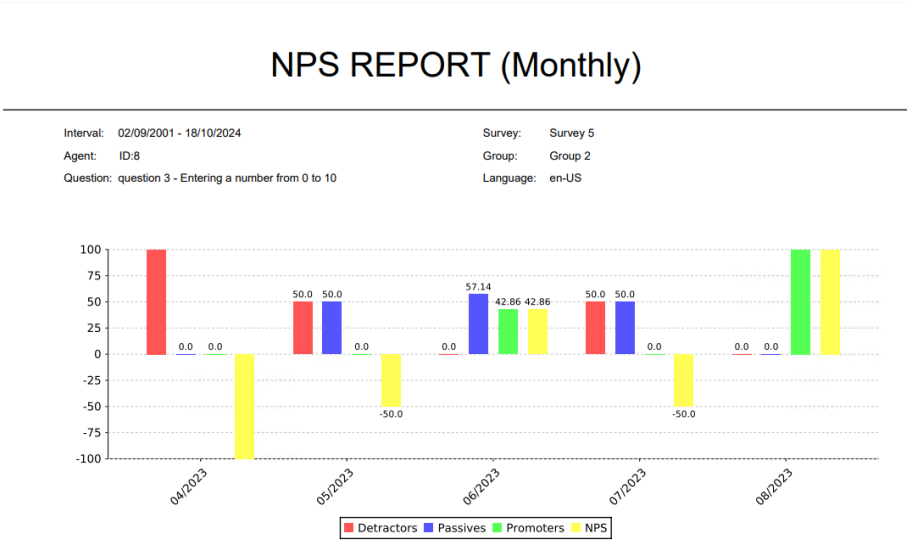


Figure 42: Report results for Example 4

8.4 Survey Per Question Report Examples

This chapter presents two examples of **Survey Per Question Reports**.

Example 1

This example presents a **Survey Per Question Report** where the results are displayed for **All Agents**.

The screenshot shows a web form titled "Report Options" in a blue header. The form contains several input fields: a "Report Type" dropdown menu set to "Survey Per Question", a "Select Survey *" dropdown menu set to "Survey 5", "Start Date *" and "End Date *" date pickers set to "9/2/2001" and "10/18/2024" respectively, and a "Select an Agent ID" dropdown menu set to "All Agents". A yellow "Generate Report" button with a magnifying glass icon is located in the top right corner of the form.

Figure 43: Example 1: Survey Per Question Report with results displayed for all agents

With this configuration, the report results are the following:

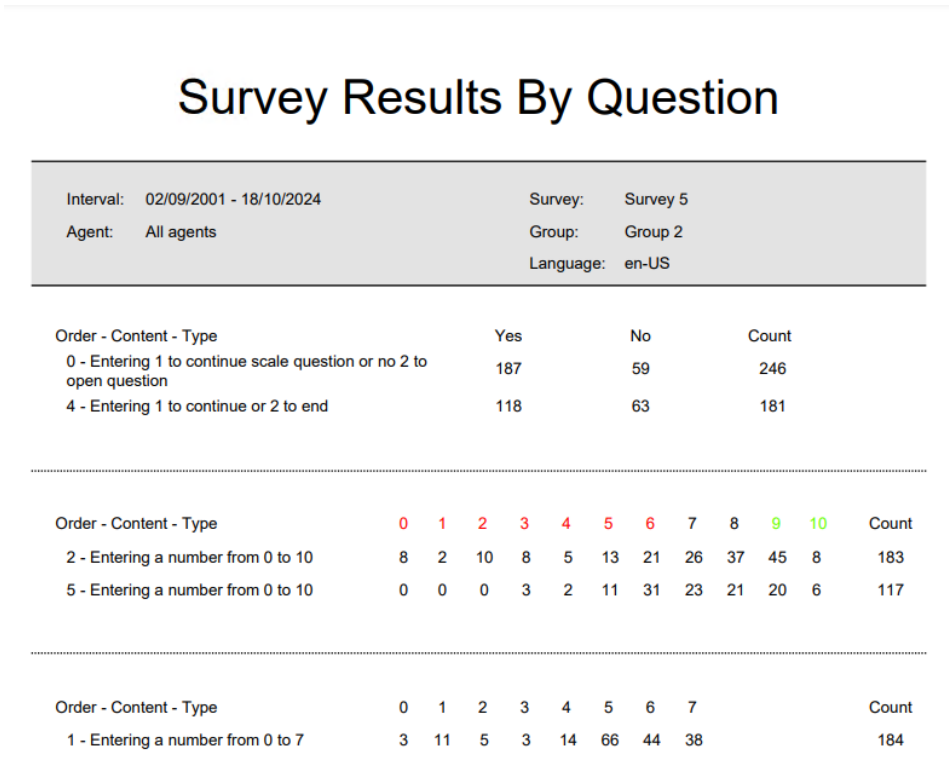


Figure 44: Reports Results for Example 2

Example 2

This example presents a **Survey Per Question Report** where the results are displayed for **a specific agent**.

Report Options

Report Type

Survey Per Question

Generate Report

Select Survey *

Survey 5

Start Date *

9/2/2001

End Date *

10/18/2024

Select an Agent ID

8

Figure 45: Example 2: Survey Per Question Report with results displayed for a specific agent

With this configuration, the report results are the following:

Survey Results By Question

Interval:	02/09/2001 - 18/10/2024	Survey:	Survey 5
Agent:	ID:8	Group:	Group 2
		Language:	en-US

Order - Content - Type	Yes	No	Count
0 - Entering 1 to continue scale question or no 2 to open question	71	20	91
4 - Entering 1 to continue or 2 to end	47	24	71

Order - Content - Type	0	1	2	3	4	5	6	7	8	9	10	Count
2 - Entering a number from 0 to 10	4	1	2	0	1	4	8	12	16	20	3	71
5 - Entering a number from 0 to 10	0	0	0	1	0	2	14	7	14	8	1	47

Order - Content - Type	0	1	2	3	4	5	6	7	Count
1 - Entering a number from 0 to 7	1	6	3	0	4	28	18	11	71

Figure 46: Report Results for Example 2

NOTICE: Reports generated while the Survey is not yet in Production state have a “DRAFT” water mark.
