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Interaction Feedback

Printed Help

Abstract

This document is a printable version of the Interaction Feedback help. Interaction Feedback is an IC Business Manager application program module that supports automated post-call customer satisfaction surveys and on-demand surveys. Interaction Feedback has an intuitive user interface to help you build effective satisfaction surveys that ask your customers discerning questions about your company's products and services.

For the latest version of this document, see the PureConnect Documentation Library at: http://help.genesys.com/pureconnect.

Table of Contents

About Interaction Feedback

Welcome to Interaction Feedback, an IC Business Manager application program module that supports automated post-call customer satisfaction surveys and on-demand surveys. Interaction Feedback has an intuitive user interface to help you build effective satisfaction surveys that ask your customers discerning questions about your company's products and services.

Here's an overview of Interaction Feedback features.

Interaction Feedback Client

Interaction Feedback, an IC Business Manager add-on module, allows you to create customer satisfaction surveys using the Interaction Feedback Create Survey Wizard. Surveys can be created using pre-defined industry standard templates, or customized questions can be easily created using Interaction Feedback Tools. Completed survey results are viewed using the Interaction Feedback Dashboard, giving you immediate insight into your customers' experiences.

Real-time monitoring in IC Business Manager

An Interaction Feedback Statistics View in IC Business Manager provides you with the ability to view real-time statistics for surveys *in progress,* surveys customers are in the process of taking. Interaction Feedback takes advantage of the Interaction Supervisor Alerting mechanism, allowing you to receive immediate notifications when surveys fail to meet a minimum acceptable score. Using real-time monitoring helps you understand what you are doing well and what immediate actions might need to be taken to meet customer expectations.

Interaction Feedback Reports

Interaction Feedback Reports are available in Interaction Reporter in IC Business Manager. These pre-defined reports contain summary and detailed information on completed customer satisfaction surveys.

Interaction Administrator configuration

After installation, Interaction Feedback is readily configured in Interaction Administrator. Licensing for accessing Interaction Feedback features is also controlled in Interaction Administrator. For more information, see the *Interaction Feedback Technical Reference*, available in the PureConnect Documentation Library on your CIC server. The latest version of this document can also be accessed from the PureConnect Documentation Library at help.genesys.com.

For a list of additional resources for Interaction Feedback, see Review Interaction Feedback Resources.

Related Topics

Interaction Feedback Navigation Pane

Interaction Feedback User Interface

Interaction Feedback User Interface

Interaction Feedback Client uses the IC Business Manager user interface, which makes it easier to navigate your options when creating and viewing customer surveys. The interface includes menus, toolbars, navigation panes, and a workspace. For basic information on using the IC Business Manager interface, see Getting Started on the Help menu.

To learn more about the Interaction Feedback user interface features, pause the mouse pointer over the menu bar, toolbar, navigation panes, or workspace on the graphic below, and click to display more information.
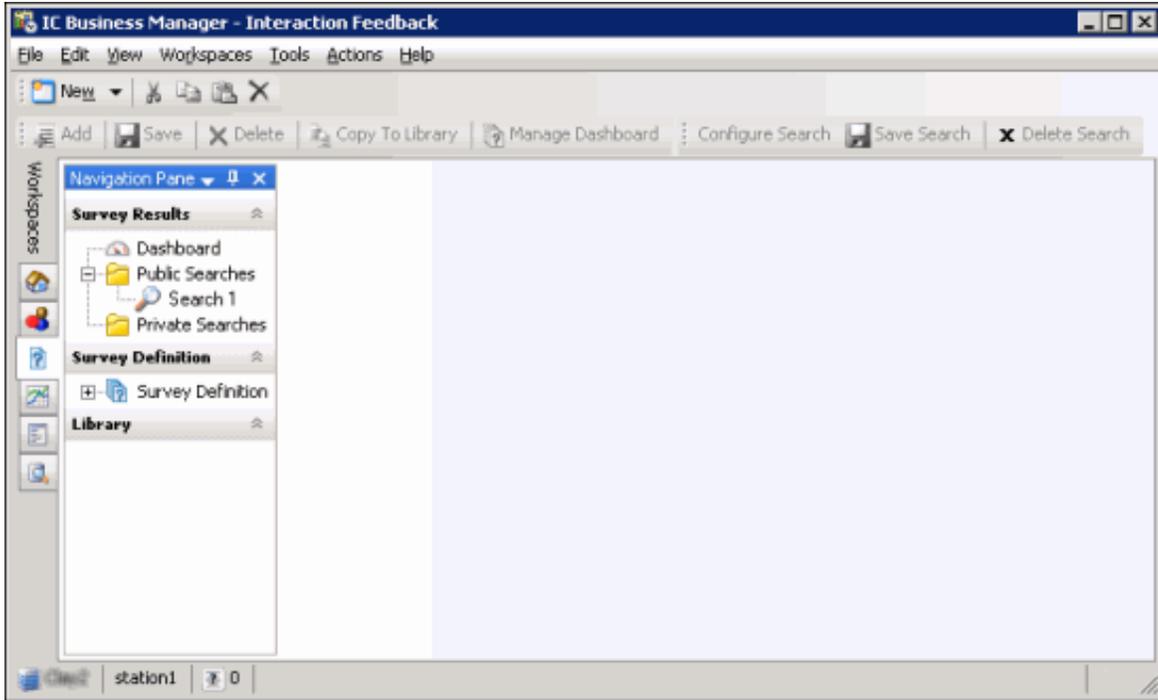
For more information on the easy-to-use navigation features, see Interaction Feedback Navigation Pane.

Interaction Feedback Navigation Pane

The **Interaction Feedback** navigation pane provides easy access to its survey features in the following navigation panes: **Survey Results**, **Survey Definition**, and **Library**.

To learn more about the Interaction Feedback Navigation Pane, pause the mouse on one of the panes below, and click to display more information.

Navigation Pane ▼ ⌐ ✕

Survey Results ⌃

- 🕓 Dashboard
- 📁 Public Searches
  - 🔍 *Survey Search*
- 📁 Private Searches

Survey Definition ⌃

- 📘 Survey Definition
  - 📘 New Test Group
    - 📄 New Survey
  - 📘 Group B
    - 📄 Public Survey
    - 📄 On-Demand Survey

Library ⌃

- Customer Satisfaction 1
- Customer Satisfaction 2
- Customer Satisfaction 3
- Driver - CSR Communication Skills - Instructions
- Driver - CSR Communication Skills 1
- Driver - CSR Communication Skills 2
- Driver - CSR Demeanor - Instructions
- Driver - CSR Demeanor 1
- Driver - CSR Demeanor 2
- Driver - CSR Knowledge - Instructions
- Driver - CSR Knowledge 1
- Driver - CSR Knowledge 2
- Driver - Image - Instructions
- Driver - Image 1
- Driver - Image 2
- Driver - IVR - Instructions
- Driver - IVR 1
- Driver - IVR 2
- Driver - Problem Resolution - Instructions
- Driver - Problem Resolution 1
- Driver - Problem Resolution 2
- Driver - Quality of Information - Instructions
- Driver - Quality of Information 1
- Driver - Quality of Information 2
- Driver - Timeliness - Instructions
- Driver - Timeliness 1
- Driver - Timeliness 2
- Outcome - Buy Again
- Outcome - Primary Supplier
- Outcome - Recommend
- Outcome - Try New Products

Related Topics

Dashboard View

Interaction Feedback User Interface

Question View

Survey View

Review Interaction Feedback Resources

Because Interaction Feedback is integrated with Customer Interaction Center, there are additional technical references and guides that include Interaction Feedback information. Documents are available in the PureConnect Documentation Library on your CIC server.

The latest versions of these documents can also be accessed from the PureConnect Documentation Library on the PureConnect website at:
help.genesys.com

For additional information about Interaction Feedback features, see the following technical references, Help, and links:

- *Interaction Feedback Technical Reference*
- *PureConnect Installation and Configuration Guide*
- *IC Business Manager Help*
- *PureConnect Data Dictionary*
- Interaction Supervisor Help

Creating Customer Surveys

Interaction Feedback provides tools that help you easily build customer surveys and view survey results.

For more information, see About Customer Surveys.

About Customer Surveys

Interaction Feedback provides a simple solution to building surveys for measuring customer satisfaction. There are two types of surveys, Post-Call Survey and On-Demand Survey. An Interaction Feedback automated survey assists you in gathering and analyzing customer feedback faster and better than conventional survey methods.

An Interaction Feedback post-call survey contains:

- **Rule Conditions** that determine which customer calls will be offered the opportunity to take a survey.
- **Prompts** which invite the customer to take a survey, welcome the customer to the survey, and thank the customer for taking the survey.
- **Questions** that measure a customer's perception on satisfaction with the overall experience of the call, customer feedback on the agent's skills and knowledge, and the likelihood that the customer might buy or recommend your company's products.

An on-demand survey contains **Prompts** and **Questions**.

For basic steps to create a survey, see Creating Surveys.

Creating Surveys

The following links are meant to familiarize you with the basic steps you'll need to create Post-call and On-demand surveys.

The basic steps in creating a survey are:

1. Create a survey group
2. Add a survey to a group
3. Add questions to the survey
4. Activate the survey

Customized surveys

Detailed instructions, including steps with graphics, on creating custom surveys are in the *Interaction Feedback Technical Reference.* This document is available in the PureConnect Documentation Library on your CIC server. The latest version of this document can also be accessed from the PureConnect Documentation Library at help.genesys.com.

Creating a Survey Group

Create survey groups to organize surveys into logical groups and to control user access to those surveys.

To create a survey group:
1. From the Interaction Feedback **Navigation Pane**, under **Survey Definition**, select **Survey Definition**. The **Add Group** button is now available on the Toolbar.
2. Click the **Add Group** button. The Create New Group dialog is displayed.
3. Type a **Name** and **Description** for your new group, and click **OK**. The new survey group is added to the bottom of the survey

   group list and is indicated by the group icon .

To learn how to create a new survey for a group, see Adding a Survey to a Group.

Adding a Survey to a Group

Use the Create Survey Wizard to add a new survey to a group. There are two types of surveys that can be created: **Post-Call** survey in which the caller chooses to participate, or an **On Demand** survey that is initiated through Interaction Attendant.

To create a survey:
1. Under **Survey Definition**, select the survey group to which you want to add a survey. The **Add Survey** button is now available on the toolbar.
2. Click the **Add Survey** button. The **Create Survey Wizard** starts.
3. Click **Next** and follow the wizard instructions to create a new custom survey or to create a survey from a template.

> **Notes for On-demand surveys**
> - On-demand IVR surveys are initiated in Interaction Attendant.
> - An on-demand survey must be marked Active in order to be available for use in Interaction Attendant.
> - For detailed instructions on adding an on-demand survey to an Interaction Attendant profile, see the Help topic, "Add inbound IVR surveys to Interaction Attendant profiles" in the Interaction Attendant Help.

After creating a survey, the next step is adding questions to your survey. To learn more, see Adding Questions to a Survey.

Adding Questions to a Survey

Use the Create Question Wizard to add questions to a survey. Questions can be added when you are creating a survey, or you can add questions to an existing survey.

Adding questions when creating a survey

Questions can be added at the completion of the Create Survey Wizard.

To add a question at the end of creating a survey:

1. On the last screen of the **Create Survey Wizard**, select the **Create question now** check box.
2. Click **Finish**. The **Create Question Wizard** is started.
3. Follow the wizard instructions to create one or more survey questions.

Adding questions to an existing survey

Questions can be added using the Create Question Wizard.

To add a question to an existing survey:

1. Under the survey group, select the survey. the **Add Question** button is now available on the toolbar.
2. Click **Add Question** on the toolbar. The **Create Question Wizard** is started.
3. Follow the wizard instructions to create one or more survey questions.

Detailed instructions on using the Create Survey Wizard to add a question to a survey are in the *Interaction Feedback Technical Reference,* available in the PureConnect Documentation Library on your CIC server. The latest version of this document can also be accessed from the PureConnect Documentation Library at help.genesys.com.

Related Topics

Activating a Survey

Editing Questions

Editing Questions

Questions can be edited in the Interaction Feedback Question view, which is displayed in the workspace.

To edit the settings for a question:

1. In the Survey Definition pane, under the survey, select the question. The question properties are displayed in the workspace.
2. Enter your changes, and when you have finished, right click and in the shortcut menu, select **Save question**.

> **Note** You can change the order questions appear in a survey. To do this, from the Interaction Feedback Navigation Pane, select a Question in a Survey. Right-click on the Question, and on the shortcut menu click **Up** or **Down**. The position of the question is reordered in the survey.

Detailed instructions on using the Create Survey Wizard to add a question to a survey are in the *Interaction Feedback Technical Reference,* available in the PureConnect Documentation Library on your CIC server. The latest version of this document can also be accessed from the PureConnect Documentation Library at help.genesys.com.

For a quick look at the available question settings, see Question View.

Adding branching logic to a survey

Adding branching logic to a survey allows the survey to change according to user responses to specific questions. In a survey with branches, relevant questions are offered according to the user's specific situation. With branching, questions can be skipped or another question can be asked based on the user response to a branching question.

After your survey has been created and you have added all your questions to the survey, you can add branching to specific survey questions. Branching is configured in the Interaction Feedback Question View. Branching options can be configured for the following question types: True/False, Multiple Choice, and Numeric Range. Free Form (recording) questions cannot be configured as a branching question. Each question type has its own set of branching options.

For step-by-step instructions on configuring each question type for branching logic in your survey, see "Appendix B. Add branching logic to a survey" in the *Interaction Feedback Technical Reference,* available in the PureConnect Documentation Library on your CIC server. The latest version of this document can also be accessed from the PureConnect Documentation Library at help.genesys.com.

Activating a Survey

Activating a survey makes it available to CIC server for post-call customer surveys and on-demand surveys. An active survey cannot be modified.

There are two ways to activate a survey, in the Survey view and in the Survey Activation view.

Activating a survey in Survey view

To activate a survey while viewing a survey:

1. In the Survey Definition pane, select the name of the survey to be activated. The survey is displayed in the workspace.
2. Click **Activate**.

Activating a survey in Survey Activation view

To activate a survey from a list of all available surveys:

1. In the Survey Definition pane select **Survey Definition**. The **Survey Activation** view is displayed in the workspace.
2. From the list of surveys, select the name of the survey you want to activate.
3. Click **Activate**.

Related Topics

Deactivating a Survey

Deactivating a Survey

In order to modify an activated survey, it must be deactivated.

There are two ways to deactivate a survey, in the Survey view and in the Survey Activation view.

Deactivating a survey in [Survey view](#)

To deactivate a survey while viewing a survey:
1. In the Survey Definition pane, select the name of the survey to be deactivated. The survey is displayed in the workspace.
2. Click **Deactivate**.

Deactivating a survey in Survey Activation view

To deactivate a survey from a list of all available surveys:
1. In the Survey Definition pane select **Survey Definition**. The **Survey Activation** view is displayed in the workspace.
2. From the list of surveys, select the name of the survey you want to deactivate.
3. Click **Deactivate**.

When you click **Deactivate**, a confirmation dialog is displayed with three choices: **Yes**, **No**, or **Cancel**.
- When you choose **Yes**, all previous survey results will be purged, and the survey is deactivated.
- When you choose **No**, survey results are not purged and the survey is deactivated. Previous survey results will be mixed with new survey results. Consider selecting No if you are changing something minor. However, this might cause confusion in long-term reporting, for example if you add a new question.
- When you choose **Cancel**, survey results are not purged and the survey is not deactivated.

Related Topics

[Activating a Survey](#)

Survey View

The Survey view displays current settings for the selected survey. Use this view to change and update survey settings.

Type

This field displays the Type of survey. There are two types of surveys: Post-Call survey and On Demand survey.

Name

The survey name is displayed. Use this field to change the name.

Description

The description for the survey is displayed. The text in the Description box is displayed as a tooltip when you pause the mouse over the survey in the Survey Definition pane. Use this field to make changes to the description of the survey.

Rank Group

The Rank Group box displays the currently selected Rank Group for this survey. Use the arrow in the drop-down box to select a different Rank group from the list.

Record calls that use this survey

Select this box if you want to record the audio portion of a Post-Call survey. This recording option is *not* available for On-demand surveys. Do not select this box if you use Interaction Recorder to record calls.

Minimum Acceptable Score

Use this field to set a minimum score for this survey. Enter the Minimum Acceptable Score as a percentage of the maximum score for the survey. Click the information icon, next to the Minimum Acceptable Score box, to display a tooltip that assists you in selecting the percentage for the minimum acceptable score for the survey. The Minimum Acceptable Score percentage is the number that is used for Alert notification in Interaction Supervisor.

Rule

Use the Rule page to add a rule for a Post-Call survey, change the rule settings, or remove a rule from a survey. This page is not available for On-demand surveys.

Add a rule

To add a Rule to a survey:
1. In the **Rule Conditions** list, select the check box
2. In the **Rule description** box, click the highlighted value to edit
3. In the dialog that is displayed, set the values for the rule.

Edit a rule

To edit a value for a Rule value:
1. In the **Rule description** box, click the highlighted value of the rule to edit
2. In the dialog that is displayed, update the values for the rule.

> **Note** Rule Condition values are case sensitive. When setting a Rule Condition <value> for an <attribute>, the specified value must be an exact match to the value of the Attribute associated with the call. For example, if the call attribute has a value of **true** and the Rule Condition value is set to **True**, the survey will not be offered.

Remove a rule

To remove a Rule from a survey, in the **Rule Conditions** list, clear the check box.

Prompts

Use the Prompts page to edit prompts for this survey.

Invitation

This Post-Call survey prompt is presented to the caller at the beginning of the interaction to participate in a survey at the end of the call. In the **Invitation** box, use the arrow in the drop-down list to select a prompt that invites the customer to participate in this survey. Note, you can also configure this post-call survey prompt to automatically present a survey to the caller by setting the Invitation prompt to **None**.

The Invitation prompt is not displayed for On-demand surveys.

To preview the selected prompt, click the play button .

To create a new prompt, select **[add recording]**, and use the Prompt Edit dialog to add a new prompt.

Opt-in

This Post-Call survey prompt is presented when the customer has chosen to take the survey, and it requests that the customer stay on the line after the interaction has concluded. In the **Opt-in** box, use the arrow in the drop-down list to select a prompt. This prompt is not displayed for On-demand surveys.

To preview the selected prompt, click the play button. To create a new prompt, select **[add recording]**, and use the Prompt Edit dialog to add a new prompt.

Opt-out

This Post-Call survey prompt is presented when the user has chosen *not* to take the survey. In the **Opt-out** box, use the arrow in the drop-down list to select a prompt. This prompt is not displayed for On-demand surveys.

To preview the selected prompt, click the play button. To create a new prompt, select **[add recording]**, and use the Prompt Edit dialog to add a new prompt.

Welcome

This prompt welcomes the customer to the Post-Call survey and the On-Demand survey and provides instructions on how to take the survey, such as hot to repeat a question or how to skip a question. In the **Welcome** box, use the arrow in the drop-down list to select a prompt.

To preview the selected prompt, click the play button. To create a new prompt, select **[add recording]**, and use the Prompt Edit dialog to add a new prompt.

Finish

This prompt is presented at the completion of a Post-call survey and On-Demand survey. In the **Finish** box, use the arrow in the drop-down list to select a prompt.

To preview the selected prompt, click the play button. To create a new prompt, select **[add recording]**, and use the Prompt Edit dialog to add a new prompt.

For additional information on creating a new prompt for your survey using the Prompt Edit dialog, see Prompt Edit .

Creating Templates

You can create question and survey templates from existing questions and surveys.

For more information, see About Templates.

About Templates

Templates are created from existing surveys and questions. Templates save the settings for surveys and questions, saving you time when creating new surveys. Templates are saved in the Library for reuse.

For more information, click on a link below:
- Creating Survey Templates
- Creating Question Templates.

Creating Survey Templates

Survey templates save the settings for existing surveys and save you time when creating new surveys.

To create a survey template from an existing survey:

1. In the Survey Definition pane, select the survey.
2. Click **Copy to Survey Library** on the toolbar.

   The survey template is added to the Library and is indicated with a survey template icon .

For additional information on creating other templates, see Creating Question Templates.

Creating Question Templates

Question templates save the settings for existing questions and save you time when creating new surveys.

To create a question template from an existing question:

1. In the Survey Definition pane, select the question.
2. Click **Copy to Question Library**. on the toolbar.

   The new question template is added to the Library and is indicated with a question template icon.

To learn about removing custom questions that have been copied to the Question Library, see Deleting Custom Questions from the Library.

For additional information on creating other templates, see Creating Survey Templates.

Deleting Custom Questions from the Library

You can remove custom questions that have been copied to the Question Library. To delete a question, the User must have the Access Rights to Modify All surveys.

To remove a custom question from the Library:

1. In the Library pane, select the question to be deleted.
2. Right-click and on the shortcut menu, click **Delete item**.

You can only delete questions you have added to the Library.

For information on creating custom questions, see [Creating Question Templates](#).

Viewing Survey Results

You can view completed survey results in the Interaction Feedback Workspace, using the Dashboard or Searches. You can also monitor surveys in real-time using Interaction Feedback Statistics View.

To learn about viewing survey results, click one of the following links:

- Viewing Survey Results in Interaction Feedback
- Monitoring Surveys in Real-Time

Viewing Survey Results in Interaction Feedback

There are two ways to view completed surveys using Interaction Feedback, the **Dashboard** and **Searches**. Use the Navigation Pane to display these views in the workspace.
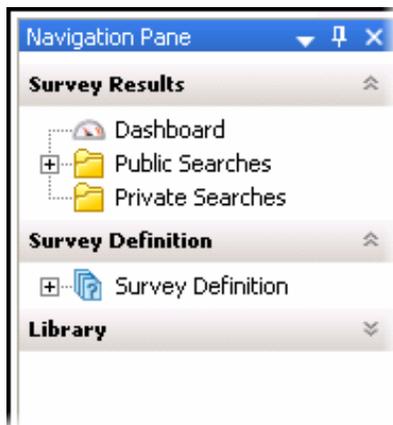
For the steps to view completed survey results in Interaction Feedback, see:

- Viewing Survey Results in the Dashboard
- Viewing Survey Results Using Searches

Viewing Survey Results in the Dashboard

Viewing Survey Results in the Dashboard

Use the Dashboard to view a summary of individual survey results. From the Interaction Feedback **Navigation Pane**, under **Survey Results**, click **Dashboard**. The Dashboard view is displayed in the workspace.
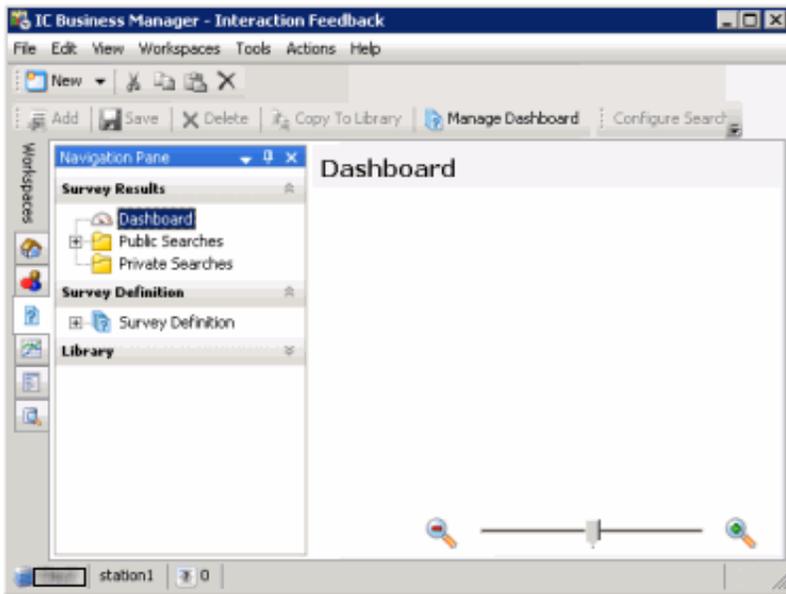
Managing the Dashboard

Use the **Manage Dashboard** toolbar button to add individual survey results to the Dashboard. Results are graphically displayed as a speedometer.
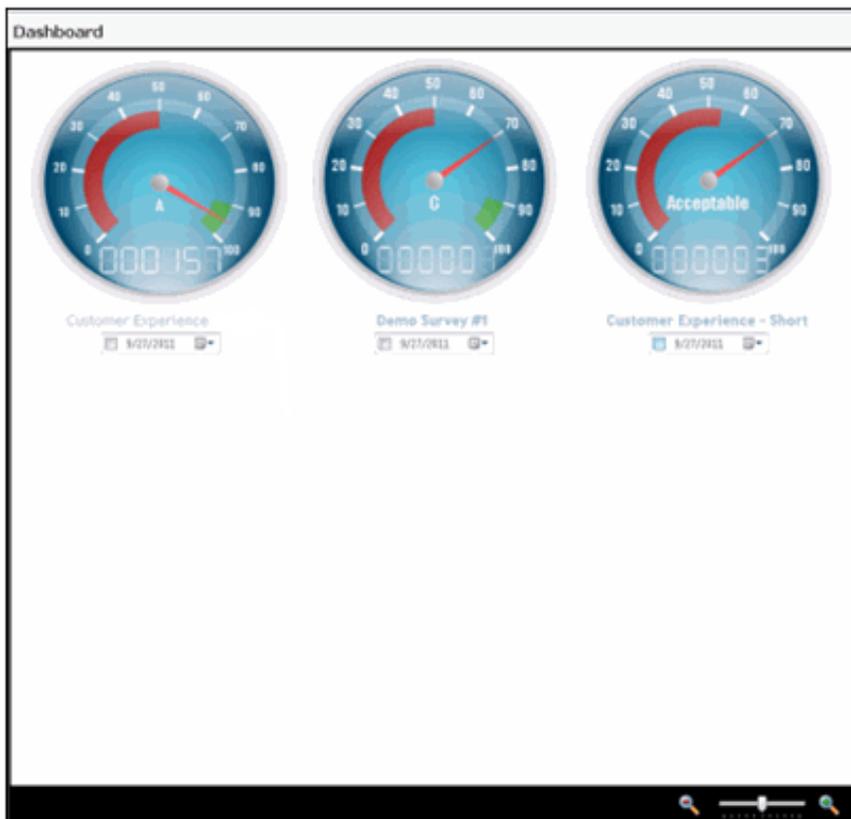
Dashboard View

The graphical interface shows the average score for surveys *completed* since the selected **Starting Date**. The speedometer also displays the rank and the number of completed surveys.

Dashboard Speedometer

The Dashboard speedometer gives you a quick view of completed survey results. A speedometer is displayed for each survey that has been added to the view using Manage Dashboard.

Speedometer pointer

The average score for the surveys taken is indicated by the pointer, between 0 and 100.

Ranking

The average ranking of a survey is displayed on the face of the speedometer. The text that is displayed depends on the Rank label assigned when creating the Rank Group.

Odometer

The number of completed surveys is displayed by the odometer.

Survey name

The survey name is displayed below the speedometer.

Starting Date

Select this check box to display data for a range of dates beginning with a specific date to the current day.

Date field

Enter a specific date for which to display completed survey results. If the Starting Date check box is selected, the average completed survey results, beginning with this date to the current day, are displayed.

Refreshing the Dashboard view

The Dashboard view is updated with completed survey results every three minutes, or when refreshed. To refresh the view, right-click on the Dashboard, and on the shortcut menu click Refresh.

Defining Surveys to display in the Dashboard

To display completed survey results in the Interaction Feedback workspace:

1. From the toolbar, click the **Manage Dashboard** button .
   The **Manage Dashboard** dialog is displayed.
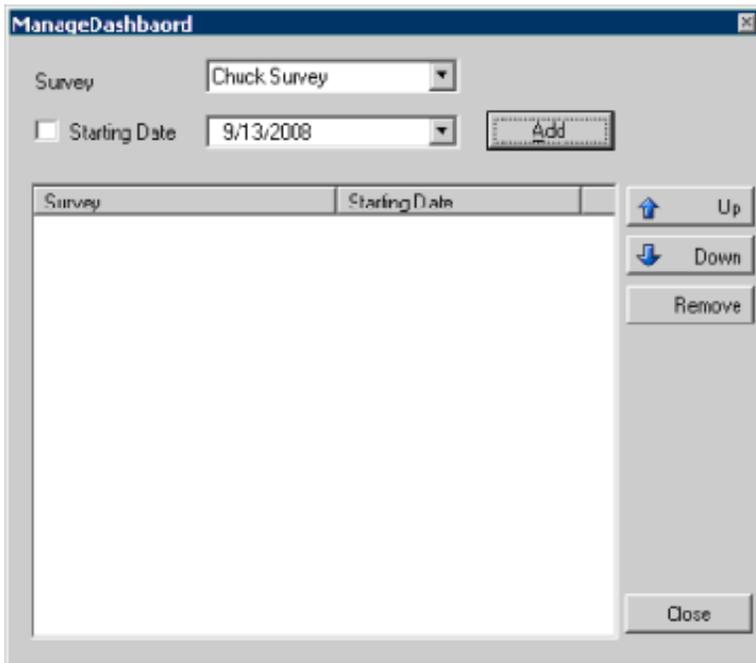
2. From the **Survey** drop-down list, select the survey to be displayed.

3. To display survey results for a range of dates beginning with a specific date to the current day, select the **Starting Date** check box. Next, in the date field drop-down, select a starting date on the calendar that is displayed.

   Or, to display survey results for a *specific* date, clear the Starting Date check box, and in the drop-down calendar select the date for which you want the data to be displayed.

4. Click **Add**. The survey is added to the **Survey** list, and the survey is displayed on the Dashboard.

5. Continue to define as many surveys as you want to display on the Dashboard. When you have completed defining surveys, click **Close**.

   The Dashboard is populated with the completed survey speedometers you have created.

For the steps to create searches to display completed survey information in Interaction Feedback, see Viewing Survey Results Using Searches.

Viewing Survey Results Using Searches

Create **Public Searches** and **Private Searches** to display completed survey results, in table form. After creating a search, use **Run a Search** to view the survey results in the workspace.

Create a search

1. Select either the **Public Searchers** folder or the **Private Searches** folder and right-click the selection.
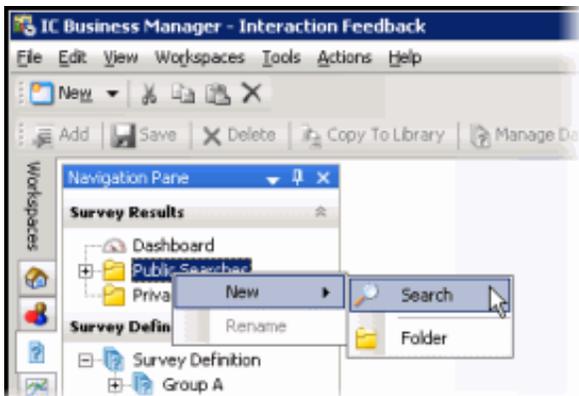
2. On the sub-menu, point to **New**, and then click **Search**. The search properties are displayed in the workspace.
3. The default search name is displayed in the **Title** box. To rename the search, type a new name.
4. To add an attribute to the search, click the **New Attribute** arrow.
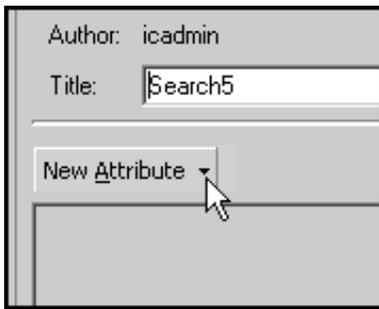
5. Point to **Survey**, and click the <u>search attribute</u> you want to add to your search.
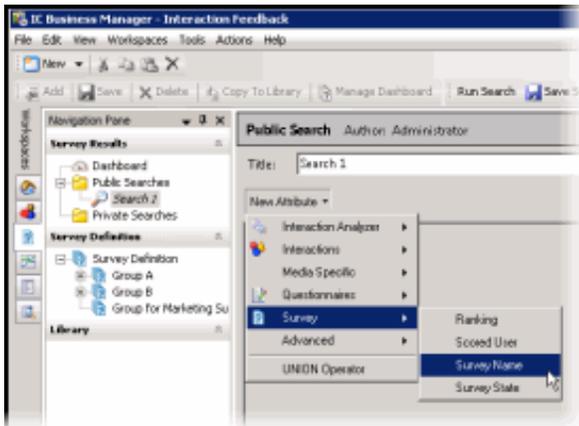
6. Select each attribute's search criteria and comparison operator.

 Use this button to add additional search criteria to an attribute.

 Use this button to delete a search criterion from an attribute.
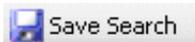
7. To save a search, click Save Search on the toolbar.

> **Note**
> You can also create Public and Private Searches using the Menu Bar and the Toolbar. Using the Menu Bar, from the **File** menu, point to **New** and click **Search**. On the **Select Search Location** dialog, select **Private Searches** or **Public Searches**. To create a new Interaction Feedback search using the Toolbar, click **New**, and on the **Create New View** dialog, click **OK**. On the **Select Search Location** dialog, select **Private Searches** or **Public Searches**.

Search order

Surveys are searched using the attributes in the way they are ordered from top to bottom. Use the green arrows to change the order of the search attributes

Use the delete button to delete a selected attribute.

Run a search

To run a search, under Survey Results, select the search, and click Run Search | Run Search | on the toolbar. The search results are displayed in the workspace.

Search1 (3 results found)

Survey Name	Agent	Caller	Score	Rank	Completed
[A]	[A]	[A]	=	[A]	[A]
Simple	-,	Interactive Intellig	158	C	True
Simple	-,	Interactive Intellig	37	F	True
Simple	-,	Interactive Intellig	209	A	True

72.9%(C)

0%   100%

Min Score: 21   Max Score: 209 Score: 158

Name	Answer	Score	
Customer Satisfaction 1 (1)	8	8	How satisfied are you with your Customer Service expe
true or false	1 (True)	100	
multiple choice	2 (a little better)	50	
free falling	Listen to comments	0	

> **Note** To paste Survey Results information into another application, use Ctrl+C in the Search Results grid to Copy an entire row, or multiple rows, to the clipboard.

Selecting Fields for the grid

To change the Fields that are displayed in the grid, click the **Field Chooser** [icon] on the top left of the grid.
In the Field Chooser dialog select the Fields to display in the grid.

Field Chooser [×]
- ☑ Agent
- ☑ Caller
- ☑ Completed
- ☑ Date
- ☑ Duration in seconds
- ☑ Interaction ID
- ☑ Origin
- ☑ Rank
- ☑ Recording ID
- ☑ Score
- ☑ State
- ☑ Survey Name
- ☑ Type

The available fields for the search results grid are described in the following table.

Field Chooser	
Field	**Description**
Agent	Name of the agent whose call is associated with this survey
Caller	Name of the caller who opted-in to take the survey
Completed	Indicates a True or False value, True indicating all required survey questions were completed, and False indicating all required survey questions were not completed
Date	The Date and Time the survey occurred
Duration in seconds	The total time, in seconds, for the caller to take the survey
Interaction ID	The Interaction ID of the call associated with the survey
Origin	How the call came in to the system—possible values: Post-Call (used for opt-in surveys), External, Internal, Transfer, or Outbound
Rank	The Rank, or grade, based on the score associated with the survey rank group
Recording ID	The Recording ID of the call associated with the survey The Recording ID is displayed as a dynamic link. To listen to the recording, click the link to launch the Interaction Recorder playback dialog.
Score	Total survey score
State	Current state of the survey, which include: • Abandoned — The caller hung up during the survey and the survey was abandoned • Complete — The survey was completed • Insufficient Resources — Licensing or some other resource was not available to present the survey • Opt-Out — The caller opted out of the survey • Error — There was an internal error when attempting to present the survey • Not Answered — The call was not answered by an agent • Caller Disconnect — The caller disconnected before the survey began
Survey Name	Name of the survey
Type	The type of survey, either Post-Call or On Demand

For the steps to display completed individual survey results in Interaction Feedback, see Viewing Survey Results in the Dashboard.

Monitoring Surveys in Real-Time

Monitor Interaction Feedback surveys in real-time and create alerts using the **Interaction Feedback Statistics View**.

The Interaction Feedback Statistics View is accessed in IC Business Manager. It provides the ability to view real-time statistics for surveys in progress—surveys customers are in the process of taking.

Interaction Feedback real-time monitoring allows you to create Alerts for surveys that are in progress.

For more information

For information on starting the Interaction Feedback Statistics View in IC Business Manager, to monitor surveys in real-time, see, "Monitoring surveys in real-time" in the *Interaction Feedback Technical Reference.* The latest version of this document can also be accessed from the PureConnect Documentation Library at help.genesys.com

For complete information on Interaction Feedback Statistics View, see the Interaction Supervisor Help in IC Business Manager.

Tools Menu

Interaction Feedback has a suite of tools to manage Interaction Feedback's Prompts, Question Categories, and Rankings.

To access these tools, click the Tools menu.
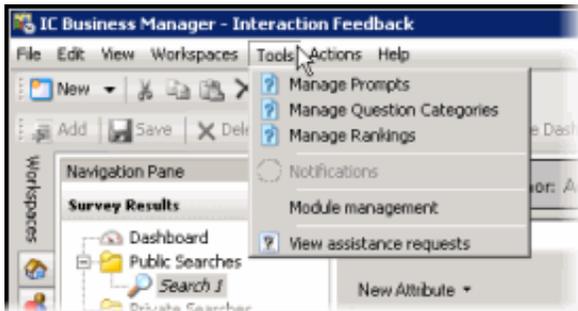
To learn more about the available Tools for Interaction Feedback, click one of the following links:

- Manage Prompts
- Manage Question Categories
- Manage Rankings

Manage Prompts

Access **Manage Prompts** from the **Tools** menu.

Prompts are pre-recorded audio files that invite the customer to participate in a survey, welcome the customer to the survey, ask the customer specific customer satisfaction questions, and thank the customer for taking the survey.

You can select prompts from existing Interaction Feedback prompts or create your own prompts.

Types of prompts

These are the types of prompts that you will be selecting on Interaction Feedback dialogs when creating surveys and questions.

Invitation

This prompt invites the customer, at the beginning of a call, to participate in a survey at the end of a call. You can also configure this prompt to automatically present a survey to the caller by setting the prompt to None.

Opt-in

This prompt recognizes that the customer has chosen to take the survey, and requests that the customer stay on the line after the call has concluded.

Welcome

This prompts welcomes the customer to the survey at the end of the agent interaction and provides instructions on how to take the survey, such as how to repeat a question or how to skip a question.

Questions

These prompts contain the specific questions that measure customers' perceptions on satisfaction with the overall experience of the call, customer feedback on the agent's skills and knowledge, and the likelihood that the customer might buy or recommend your company's products.

No Input Prompt

This is the prompt that is played if there was no response to the question.

No Match Prompt

This is the prompt that is played if the customer's response is invalid.

Finish

This prompt is played at the completion of the survey and thanks the customer for taking the survey.

Feedback Prompt Management

Use the Feedback Prompt Management tool to create new prompts, edit existing prompts, delete prompts, and import WAV files for new prompts.

To access the Feedback Prompt Management dialog, from the **Tools** menu, click **Manage Prompts**. The Feedback Prompt Management dialog is displayed.
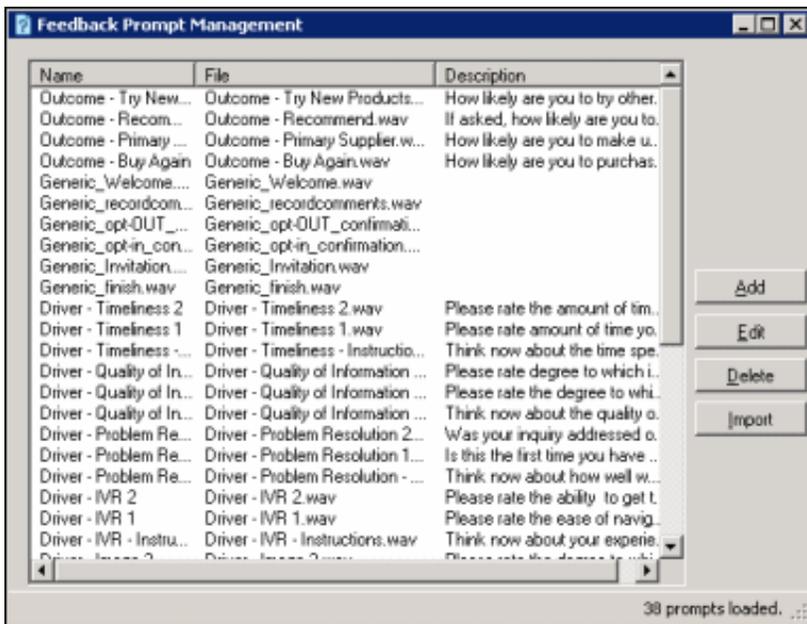
Available prompts are listed by Name, File and Description. To sort the list of prompts, click a column heading.

Creating new prompts

To create a new prompt, click **Add**. The Prompt Edit dialog is displayed.
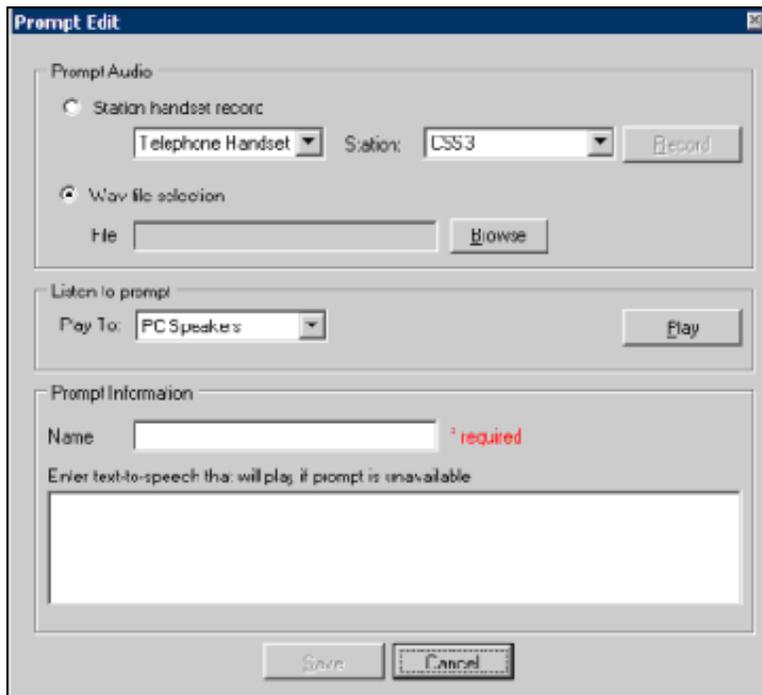
Prompt Audio

To record an audio prompt from your telephone, select **Station handset record**, and click **Record**. To use an existing audio file for your prompt, select **WAV file selection**, and click **Browse** to select the file path.

Listen to Prompt

To listen to the prompt, in the **Play To** box, select the output device, and click **Play**.

Prompt Information

Type the name for this prompt in the **Name** box. Type the full text of this prompt in the **Description or text to speech if no prompt has been added** box. This text also appears in the Description column.

When you have completed the **Prompt Edit** dialog, click **Save** to add your new prompt to the list of prompts.

Editing prompts

On the Feedback Prompt Management dialog, select the prompt, and click **Edit**. The **Prompt Edit** dialog is displayed with the current prompt settings.
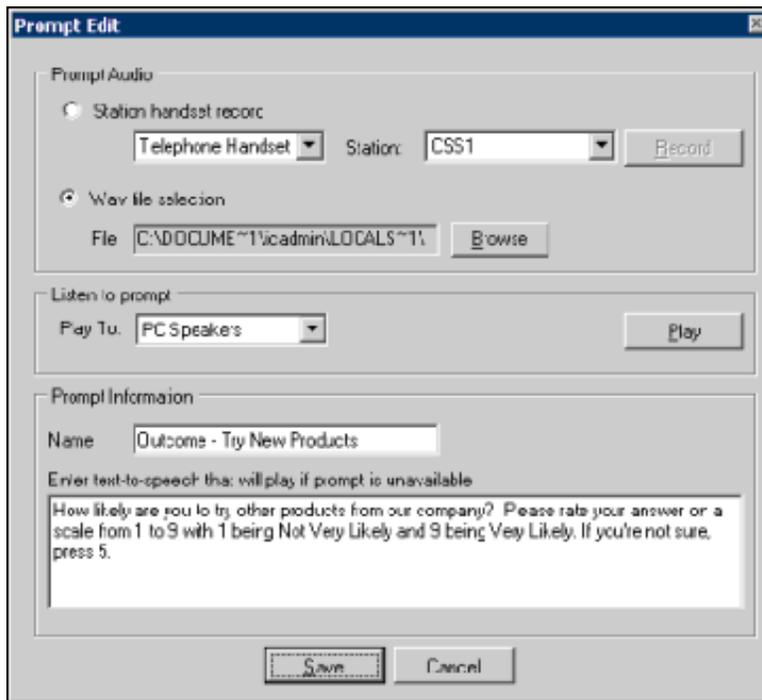
After updating the prompt properties, click **Save**.

Deleting a prompt

Use the Feedback Prompt Management dialog to delete an existing prompt. From the **Tools** menu, click **Manage Prompts**.

To delete an existing prompt, select the prompt in the **Feedback Prompt Management** dialog, and click **Delete**.

Creating a prompt from a WAV file

Use the **Feedback Prompt Management** dialog to create a prompt from an existing WAV file.
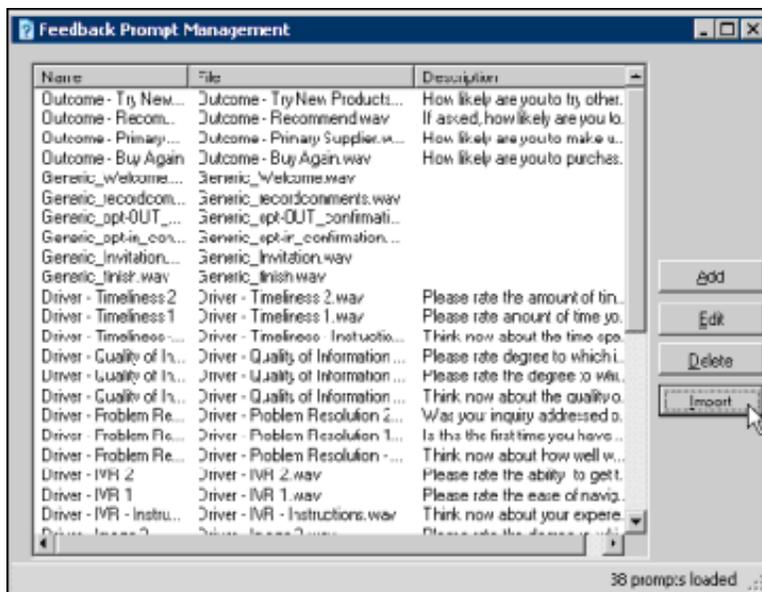
To create a prompt, click **Import**. The **Select one or more prompt WAV files to import** dialog is displayed. Locate and select the file name, and click **Open**.

A prompt is created using the WAV file name as the name of the prompt. To edit the prompt, select it and click **Edit**.

Related Topics

Manage Question Categories

Access **Manage Question Categories** from the **Tools** menu.

Question Categories are created to organize questions in to logical groups.

Question Categories

Use the Question Categories dialog to create and delete these categories. To access the Question Categories dialog, from the **Tools** menu, click **Manage Question Categories**. The **Question Categories** dialog is displayed.

Adding categories

To create a new category, click **Add**. A **New Category** is created and selected. Type a **Category Name** and press **Enter**.

Deleting categories

To delete an existing category, select it and click **Delete**.

Related Topics

Manage Rankings

Access **Manage Rankings** from the **Tools** menu.

Rankings are scaled scores used to rate or grade customer surveys. When a survey is completed, the final score is compared to the value defined in the survey's ranking. When viewing survey results, the rank is displayed in searches and the Dashboard.

Defining a Rank group

Define ranking scales on the Questionnaires Rank Groups dialog. Assign a Rank Group to a survey on the survey configuration page.

To access the Questionnaires Rank Groups dialog, from the **Tools** menu click **Manage Questionnaire Rankings**. The Questionnaires Rank Groups dialog is displayed.
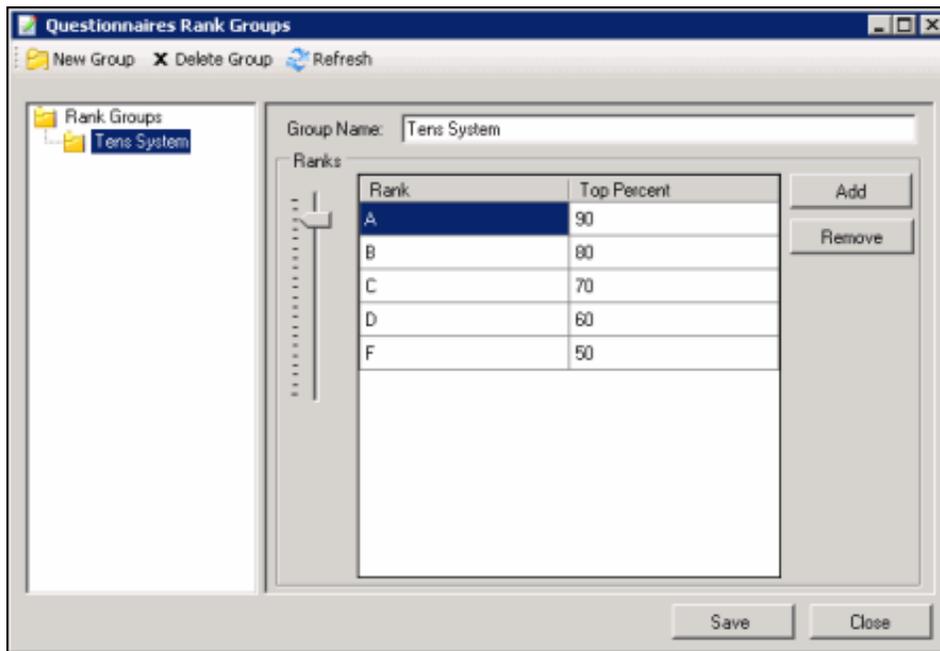
To define a new ranking scale for a Questionnaire, first create a new Rank Group.

1. On the toolbar click **New Group**. The **New Rank Group** is displayed under **Rank Groups** at the end of the list.
2. In the Rank Groups list, right-click **New Rank Group** and click **Rename** to name the new Rank Group.
3. Type the new name for this rank group, and press **Enter**. The new name is displayed in the **Group Name** box in the Rank Groups view.

Defining the ranking scale

To define the ranking scale for a group, select the Rank group, and edit its properties in the right pane.

1. To add a **Rank**, click **Add**.
2. **New Rank** is added to the Rank list and is selected. Type a name for the ranking.
3. Use the **Ranks** percentage slider to select a **Top Percent** for the ranking.

> Define as many ranks as you choose to use in your ranking scale, assigning a Top Percent to each ranking. The Top Percent is the percentage of total possible points in the survey that will be using the scale, and it defines the upper limit of the rank. The lower limit for each rank is one percent higher than the top percentage of the rank directly beneath it, or zero if there is no lower rank.

4. Click **Save**, and then click **Close** to exit the Questionnaires Rank Group dialog.

Assigning a Ranking to a survey

To assign a ranking to a survey, view the survey in the workspace.

In the Rank Group drop-down list, select a rank group to apply to the survey.

Related Topics

Manage Prompts

Manage Question Categories

Interaction Feedback Reporting

Interaction Feedback reports are available through Interaction Reporter in IC Business Manager. For more information see Interaction Feedback Reports.

Interaction Feedback Reports

The results of the customer satisfaction survey data are collected, aggregated, and presented in Interaction Reporter in IC Business Manager. Reports include data from *completed* surveys. You can view, export, and print customer satisfaction survey reports. Reports are based on *completed* customer surveys.

> **Note**
> If your survey contains a Free Form response as the last question, and the customer hangs up instead of pressing any key to complete the response, the survey state is marked Complete and the Complete Field for the report is marked as True. Comments that are ended by hanging up are displayed in the reports.

There are four reports that contain summary and detailed information on completed customer satisfaction surveys.

The reports include survey details including: user, average score, percentile, survey participant (Tracker contact), and specific scores by questions. The reports provide information for comparison between different users' average survey scores over time.

Survey Reports

The following reports are available for Interaction Feedback surveys:

Satisfaction Trends (Line Graph)

Shows satisfaction trend for an agent over time by survey.

Survey Scoring Detail

Shows detailed information related to the question of the specified survey and the average score for the agent during a date and time range. **Note** As this report contains a Bar Chart, limiting the number of users selected for a report might provide graphs that are easier to read.

Survey Scoring Summary

Shows the survey average score for the agent during a date and time range. This report also shows the Average score and Percentile per user for the selected surveys. **Note** As this report contains a Bar Chart, limiting the number of users selected for a report might provide graphs that are easier to read.

Survey vs. Quality Scores

Compares survey and quality scores for a given agent. If Interaction Recorder data is available, a report shows comparisons between survey scores and quality scores.

> **Note** The *PureConnect Data Dictionary* includes information on the Interaction Feedback Tables. In addition to that information, the following link is to the **Interaction Feedback Entity Relationship Diagram (ERD**)

Miscellaneous topics

Create Group

Use this dialog to create a new group for surveys.

Name

Type a name for the new group.

Description

Type a description for identifying the types of surveys in this group. This description appears as a tooltip when you pause the mouse pointer over the name of the group under Survey Definition.

Dashboard View

The Dashboard speedometer gives you a quick view of completed survey results. A speedometer is displayed for each survey that has been added to the view using Manage Dashboard. The Dashboard data is updated every three minutes, or when refreshed. To refresh the data, right-click on the Dashboard, and on the shortcut menu click Refresh.

Speedometer pointer

The average score for the surveys taken is indicated by the pointer, between 0 and 100.

Ranking

The average ranking of a survey is displayed on the face of the speedometer. The text that is displayed depends on the Rank label assigned when creating the Rank Group.

Odometer

The number of completed surveys is displayed by the odometer.

Survey name

The survey name is displayed below the speedometer.

Starting Date

Select this check box to display data for a range of dates beginning with a specific date to the current day.

Date field

Enter a specific date for which to display completed survey results. If the Starting Date check box is selected, the average completed survey results, beginning with this date to the current day, are displayed.

Library Pane

The **Library** navigation pane contains survey templates and question templates to use when creating surveys. Library includes custom surveys and question templates that you create. Survey templates are displayed when a survey is selected in the Survey Definition pane, and Question templates are displayed when a question is selected.

Manage Dashboard

Use this dialog to add and remove surveys in the Dashboard view.

Survey

Select the name of the survey from the drop-down list.

Starting Date

Select this check box to display data for a range of dates beginning with a specific date to the current day.

Date field

Enter a specific date for which to display completed survey results. If the Starting Date check box is selected, the average completed survey results, beginning with this date to the current day, are displayed.

Add

Click **Add** to add the survey to the **Survey** list and display the survey in the Dashboard view.

Up and Down

Use these buttons to change the order that the surveys are displayed in the Dashboard view.

Remove

To remove a survey from the Dashboard view, select the survey and click **Remove**.

Menu Bar

Commands and actions are organized in menus that you use to work with Interaction Feedback. Click a menu title on the *menu bar* to display a list of choices. To choose one of the commands listed on a menu, click it.

Navigation Pane

The **Interaction Feedback** navigation pane provides easy access to its survey features in the following navigation panes: **Survey Results**, **Survey Definition**, and **Library**. It provides centralized navigation to survey components, which display their views in the workspace next to the navigation panes.

Prompt Edit

Use the Prompt Edit dialog to add prompts to surveys and questions.

Prompt Audio box

Station handset record

To record an audio prompt from your telephone:
1. Select **Station handset record**
2. In the drop-down box, select **Telephone Handset**
3. In the **Station** drop-down list, select the station for your handset
4. Click **Record**.

To record an audio prompt from a remote telephone
1. Select **Station handset record**
2. In the drop-down box, select **Remote Telephone**
3. In the **Number** box, type the telephone number for the remote telephone
4. Click **Record**.

WAV file selection

To use an existing audio file for a prompt, select **WAV file selection**, and click **Browse** to select the file path.

Listen to Prompt

To listen to the prompt, in the **Play To** box, select the output device, and click **Play**.

Prompt Information

Type the name for this prompt in the **Name** box.

Type the full text of this prompt in the **Enter text-to-speech that will play** box.

Prompt Management

Use this dialog to create new prompts, edit existing prompts, delete prompts, and import WAV files for new prompts. Available prompts are listed by **Name**, **File**, and **Description**. To sort the list of prompts, click a column heading.

Add

To create a new prompt, click **Add**. The **Prompt Edit** dialog is displayed.

Edit

To edit an existing prompt, select the prompt and click **Edit**. The **Prompt Edit** dialog is displayed.

Delete

To delete an existing prompt, select the prompt and click **Delete**.

Import

To create a prompt from an existing WAV file, click **Import**. A dialog used to select WAV files is displayed. The prompt will be named the same as the WAV file. To edit the new prompt and change the name, select it and click **Edit**.

Question Categories

Question Categories are created to organize questions in to logical groups. Use this dialog to create and delete Question Categories.

Add

To create a new category, click **Add**. A **New Category** is created and selected. Type a **Category Name** and press **Enter**.

Delete

To delete an existing category, select it and click **Delete**.

Question View

The Question view displays current settings for the selected question. Use this view to change and update question settings.

Name

The Question name is displayed. Use this field to change the name.

Description

The description for the question is displayed. The description usually includes the content of the question prompt for reference purposes. The text in the Description box is displayed as a tooltip when you pause the mouse over the question in the Survey Definition pane. Use this field to make changes to the description of the question.

Question prompt

The Question prompt is the actual question that measures the customer's overall experience of the call, including the customer's feedback on the agent's skills and knowledge, and the likelihood that the customer might buy or recommend your company's products. The Question prompt contains the specific audio for this question. The name of the Question prompt for this question is displayed. To change the prompt, use the drop-down list to select a different prompt, or to create a new prompt, select **[add recording]**.

To listen to the selected prompt, click the play button .

No Input prompt

This is the prompt that the customer hears if there is no response to the question. The name of the No Input prompt for this question is displayed. To change the prompt, use the drop-down list to select a different prompt, or to create a new prompt, select **[add recording]**.

To listen to the selected prompt, click the play button .

No Match prompt

This is the prompt that the customer hears if the response to the question is invalid. The name of the No Match prompt for this question is displayed. To change the prompt, use the drop-down list to select a different prompt, or to create a new prompt, select **[add recording]**.

To listen to the selected prompt, click the play button .

For additional information on creating a new prompt for your question using the Prompt Edit dialog, see Prompt Edit .

Question Weight

The Question Weight is used as a multiplier to calculate the final score for a question. For example, if the question is scored as a 9 with a weight of 2, the final score for that question is 18. The current value is displayed. Select the number for which you want to weight the importance of this question. To change the value, enter the new value in the Question Weight box.

The Question Weight must be a non-zero value. It can be expressed as a decimal, for example 0.33, 1.5, or 5.55.

To not have the score for a question considered in the final score for the survey, use the **Ignore score for question** check box.

Ignore score for question

Select this box to <u>not</u> have the score for this question considered in the calculations for the final score of the survey.

Retries

The Retries value is the total number of times a question is repeated if there is an invalid response. If there is no response after the number of retries, Interaction Feedback goes on to the next question. However, if there is no answer or no match for the first question, Interaction Feedback abandons the survey, allowing for hang ups. After the first question is answered, the remaining questions will go on to the next question if there is no answer or no match.

Timeout

The Timeout value is the time, in seconds, to wait for a response after the Question prompt has been played. When the timeout expires, the No Input prompt is played. To change the value, enter the new value in the Timeout box.

Question Categories

Question Categories organize questions in to logical groups. The categories that currently contain this question are displayed in the **Selected Categories** box. To add categories for this question, in the **Available Categories** box, select the categories in which you want this question to be included. Click the arrow ⟶➡ to add the categories to the Selected Categories box.

To delete categories for this question, in the **Selected Categories** box, select the categories in which you want this question to be deleted. Click the arrow ⟶⬅ to delete the categories from the Selected Categories box.

Branching

Branching options can be configured for the following question types: True/False, Multiple Choice, and Numeric Range. Free Form (recording) questions cannot be configured as a branching question. Each question type has its own set of branching options. For step-by-step instructions on configuring each question type for branching logic in your survey, see "Appendix B. Add branching logic to a survey" in the *Interaction Feedback Technical Reference, a*vailable in the PureConnect Documentation Library on your CIC server. The latest version of this document can also be accessed from the PureConnect Documentation Library at help.genesys.com

Scoring Values

This field displays the various scoring values based on the type of question. One of the following scoring values is displayed, depending on the question type.

True/False

The scoring values for a True or False response are displayed. To change a value, enter the new value in the **True Value** or **False Value** box.

Multiple Choice

Customers respond to multiple choice questions by pressing a DTMF key on the keypad . The scoring values for each key are displayed in the Multiple Choice box. To change a setting for a multiple choice question, select the DTMF key to be changed, and click **Edit**.

If you want to add a new DTMF key response, click **Add**.

To remove a DTMF key response, select the DTMF key and click **Remove**.

Numeric

Customers respond to a numeric question by pressing a DTMF key on the keypad. The range of numbers to score the question are displayed in the **Min** and **Max** boxes. To change the minimum or maximum range for the score, enter a new value in the **Min** or **Max** box.

Free Form Recording

Customers respond to a free form question by recording an audio response. The maximum recording length, in seconds, is displayed in the **Max recording length** box. To change the allowed length of the recording setting, enter a new value in the **Max recording length** box. To allow the customer the option to review a recorded response, select the **Confirm Recording** box.

When the customer is given the survey, the configured prompts are presented. You can localize the Free-form recording confirmation prompts by configuring the value of the **CSSurvey: Clear Language For Survey** server parameter. The server parameter default value of **Yes** clears the language attribute of the call. If you do not want to clear the language attribute of the call when a survey begins, set the server parameter value to **No**. This allows the language attribute of the call to be used to localize the Free-form confirmation prompts.

Reordering Questions

You can change the order questions appear in a survey. To do this, from the Interaction Feedback Navigation Pane, select a Question in a Survey. Right-click on the Question, and on the shortcut menu click **Up** or **Down**. The position of the question is reordered in the survey.

Rank Groups

Rankings are scaled scores used to rate, or grade, customer surveys. When a survey is completed, the final score is compared to the value defined in the survey's ranking. When viewing survey results, the survey rank is displayed in searches and on the Dashboard view.

Use this dialog to create a Rank Group and to define ranking scales for the group.

Create a Rank Group

To create a Rank Group:
1. In the Rank Groups box, select **Rank group**.
2. Right-click to display the shortcut menu.
3. Click **Add Group**. A new folder, New Rank Group, is added to the list and highlighted.
4. To name the new rank group, right-click the selection, and click **Rename**.

Define a ranking scale

To define the ranking scale for a group:
1. Select the Rank group. The right pane displays the properties for the rank group.
2. In the right pane, click **Add**. New Rank is added to the Rank list and is selected.
3. Type a name for the ranking.
4. Using the Ranks percentage slider, select a Top Percent for the ranking.

Define as many ranks as you choose to use in your ranking scale, assigning a Top Percent to each ranking. The Top Percent is the percentage of total possible points in the survey that will be using the scale, and it defines the upper limit of the rank. The lower limit for each rank is one percent higher than the top percentage of the rank directly beneath it, or zero if there is no lower rank.

Search Attributes

There are four search attributes for **Survey**:

Ranking

The Survey Ranking attribute searches the selected Rank Group for surveys that match the selected rank using the comparison operator.

Scored User

The Survey Scored User attribute searches surveys for the selected agent using the comparison operator.

Survey Name

The Survey Name attribute searches surveys for the selected survey name using the comparison operator.

Survey State

The Survey State attribute searches surveys for the selected survey state using the comparison operator.

Advanced Search Attributes

The Advanced search attributes that apply to surveys include: Recording ID and Survey ID.

Survey Definition Pane

Use the **Survey Definition** navigation pane to create Survey Groups, create Customer Surveys, create survey questions, and to activate a survey. Surveys and Questions are edited and managed in the Survey Definition pane.

Survey Group View

The Survey Group view displays the current settings for the selected survey group. Use this view to update the Name and Description of the survey group.

Name

The Survey group name is displayed. Use this field to change the name.

Description

The description for the survey group is displayed. The text in the Description box is displayed as a tooltip when you pause the mouse over the group name in the Survey Definition pane. Use this field to make changes to the description for the survey group.

Survey Activation

When you select Survey Definition in the Interaction Feedback Navigation pane, the **Survey Activation** view is displayed in the workspace. Use the Survey Activation view to **Activate** and **Deactivate** surveys.

Total surveys defined

Displays the total number of surveys defined under Survey Definition.

Total surveys activated

Displays the total number of surveys that are active.

Survey list

This list contains all the current surveys and includes the survey **Name**, **Group**, **Active** (status), and **Priority**. To change the **Priority** in which a survey is offered, use the **Up** and **Down** buttons.

To activate a survey, select the survey, and click **Activate**.

To deactivate a survey, select the survey, and click **Deactivate**.

Note When you click **Deactivate**, a confirmation dialog is displayed with three choices: **Yes**, **No**, or **Cancel**.
- When you choose **Yes**, all previous survey results will be purged, and the survey is deactivated.
- When you choose **No**, survey results are not purged and the survey is deactivated. Previous survey results will be mixed with new survey results. Consider selecting No if you are changing something minor. However, this might cause confusion in long-term reporting, for example if you add a new question.
- When you choose **Cancel**, survey results are not purged and the survey is not deactivated.

Survey Results Pane

The **Survey Results** navigation pane allows authorized users to display the results of completed surveys in the workspace, using the Dashboard and Searches. Use the **Dashboard** for a quick graphical view of survey results by date. For more detailed survey results, use the Public Searches folder and the Private Searches folder to build customized searches.

Toolbars

Interaction Feedback *toolbars* contain buttons that represent tasks you can do within the program. Click a button on the toolbar to perform the task. To display toolbars, from the **View** menu, point to **Toolbars** and on the submenu, select the toolbar you want to view.

Workspace Tabs

Workspace Tabs allow you to switch between IC Business Manager Modules. Click the Interaction Feedback tab to open the Interaction Feedback module.

Workspace

Views selected in the Navigation Pane, such as Dashboard and Survey Definition, are displayed in the Workspace.

Change log

Date	Changes
12-March-2019	Created this change log.