



iceSurvey  
User Manual  
Server Version 14.x

Copyright © 2024 Computer Talk Technology, Inc. All rights reserved.

No part of this publication may be reproduced, transmitted, or translated in any form or by any means, electronic, mechanical, manual, optical or otherwise, including photocopying, recording, or any information storage and retrieval system, without the prior permission in writing from Computer Talk Technology, Inc.

#### ComputerTalk Trademarks

ice, iceAdministrator, iceAlert, iceBar, iceBar for web, iceBar for Teams©, iceCampaign, iceChat, iceJournal, iceManager, iceMobile Connect, iceMonitor, icePay, icePhone, iceReporting, iceSurvey, iceWorkflow Designer are trademarks of ComputerTalk Technology, Inc.

Microsoft, Excel, and Windows are either registered trademarks or trademarks of Microsoft Corporation in the United States and/or other countries.

Adobe, Acrobat, and Reader are either registered trademarks or trademarks of Adobe Systems Incorporated in the United States and/or other countries.

All other company and product names used herein may be the trademarks or registered trademarks of their companies.

Microsoft product screen shot(s) reprinted with permission from Microsoft Corporation.

# Table of Contents

Chapter 1: Getting Started.....	3
Single Sign-On.....	6
Signing On with Single Sign-On .....	6
Common Error and Warning Messages.....	8
Authentication error.....	8
Server Connection Error .....	9
Loss of connection .....	9
User Roles in the iceSurvey Tool.....	10
Managing Settings.....	10
Voice Survey Settings.....	11
Web Survey Settings .....	11
Chapter 2: Surveys .....	15
Managing Surveys .....	16
Edit a Survey .....	17
Clone a Survey .....	18
Delete a Survey .....	20
Deactivate a Survey.....	20
Create a new Survey .....	23
Types of Questions .....	32
Statement .....	32
Stars.....	32
Button.....	33
Dropdown.....	33
Slider.....	34
Text.....	35
Numeric .....	35
Question Design Rules-of-Thumb .....	36
Survey Design Rules-of-Thumb .....	36
Chapter 3: Survey Runs.....	39
Managing Survey Runs .....	40
Edit a Survey Run .....	41
Clone a Survey Run .....	42
Delete a Survey Run .....	43
Completed Survey Runs .....	45
Create a new Survey Run .....	45
Chapter 4: Audio Files.....	59
Managing Audio Files .....	60
Modifying an Audio File .....	60
Delete an Audio File.....	61
Download an Audio File .....	61
Play an Audio File.....	62



Add a new Audio File.....	62
Chapter 5: Survey Results.....	67
iceJournal Survey Responses.....	68
Appendix A: Mandatory Prompts.....	70
Index.....	72



# Welcome to iceSurvey

As email and web-based communications become more common in today's business world, many call centers are evolving into **contact centers**. Contact centers interact with clients over the telephone, through email messages, and over the Internet.

**ice** is a powerful contact center solution that allows for the integrated handling of **contacts** (calls, email messages, chat requests, etc.) that are directed to your contact center.

**iceSurvey** is a tool that allows you to define, refine, and manage surveys that are to be conducted in an automated telephone environment or online. You will be able to create and configure surveys using the iceSurvey web tool to collect feedback from contacts in order to gain information on various topics of interest from your defined groups.

This manual is designed for administrators who contribute to the creation of surveys at your organization. An administrator is responsible for defining authorized system administrators, and setting global parameters that impose corporate policy on questions, surveys, survey execution and analysis. An administrator is also able to create easy-to-understand questions and surveys that collect specific information. This application allows users to define surveys, target callers, specify when to start or stop surveys, and to determine other parameters that affect the execution.

This manual will cover several topics:

- **Chapter 1: Getting Started** provides important information regarding iceSurvey, common error and warning messages, and general settings for voice and web surveys.
- **Chapter 2: Surveys** describes how questions and pre-amble statements can be configured before being added to a survey. At the end of this chapter, best practices for designing questions and surveys are discussed.
- **Chapter 3: Survey Runs** describes how to manage and create survey runs, wrap a survey in appropriate pre-amble(s), define the type of run, define the sampling criteria, and define the surveying period.

- **Chapter 4: Audio Files** describes how to manage and add audio files used by questions and pre-amble statements defined in surveys.
- **Chapter 5: Survey Results** describes how to view Survey Results in iceJournal.
- The Appendices provides additional information to facilitate a better understanding of iceSurvey:
  - Appendix A: Mandatory Prompts

The iceSurvey User Manual discusses how to use iceSurvey; it will not cover the following topics: the selection of appropriate lexicons for surveys, statistical validity of particular sample rates, techniques for outlier identification, survey design, or the legal considerations for conducting surveys.

In discussing how this application works, this manual assumes that you have the following:

- A basic understanding of fundamental contact center terms such as inbound, outbound, user, IVR, and contact.
- Basic navigating skills for standard web-based Windows graphical user interfaces (GUIs). This includes the ability to right-click and left-click, select options from a right-click menu, re-size and minimize windows, and navigate and scroll with a mouse pointer.

The following conventions are used in this manual:

- **Notes** highlight important information.
- **Cautions** are used to bring attention to functions and features that can impact the information viewed.
- Words displayed in **bold** font are defined within the paragraph.
- *Italics* are used to indicate buttons found on the software interface.

Where you can activate a feature in more than one way (button, menu, icon, and so forth), the manual describes only one method.

This version of the manual is specific to iceSurvey Release 12. To check which version of iceSurvey you have installed, select About from the iceManager Settings page.



## Chapter 1: **Getting Started**

The iceSurvey application allows contact centers to conduct research and quality assurance through the use of surveys. Users can create and configure surveys for various modalities using this tool.

To fully utilize iceSurvey and the various configurations available, you must have the following:

- iceSurvey configured in workflow.
- An ice account created with Supervisor or Administrator level access.

**Note:** If you do not have an ice account created, contact your ice administrator.

This chapter includes information about login procedures and permissions for each user type.

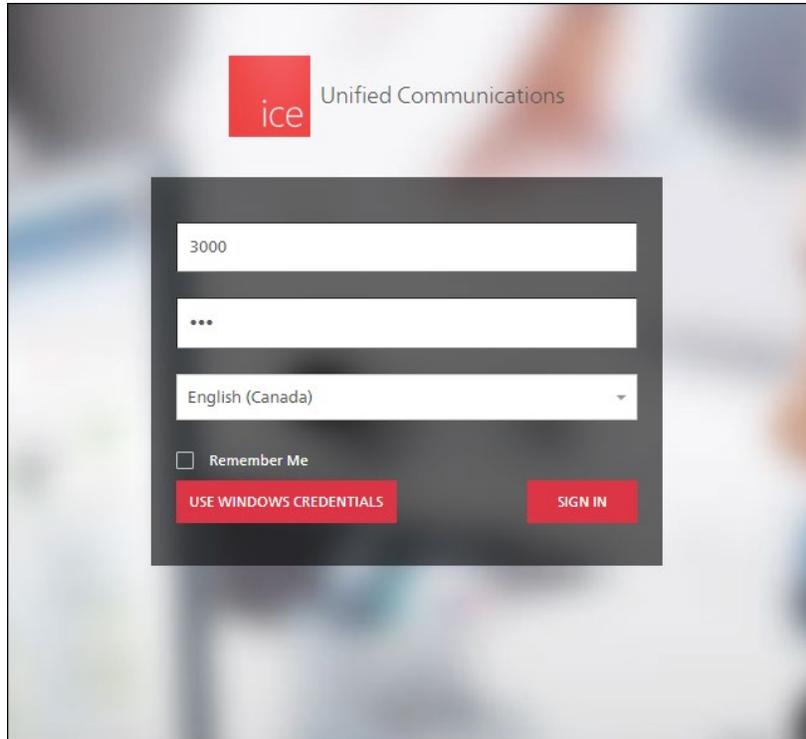
Once familiar with the iceSurvey interface, you may proceed to subsequent chapters for detailed information on how to configure a survey for voice, IM and email contacts.

To access iceSurvey, you must first log onto iceManager.

iceManager is a web-based application and can be used on any computer that is running a web browser. To sign in, you must provide a user ID and password. Contact the ice administrator if you do not have this information.

To sign into iceManager:

1. Open your web browser and go to your iceManager site.

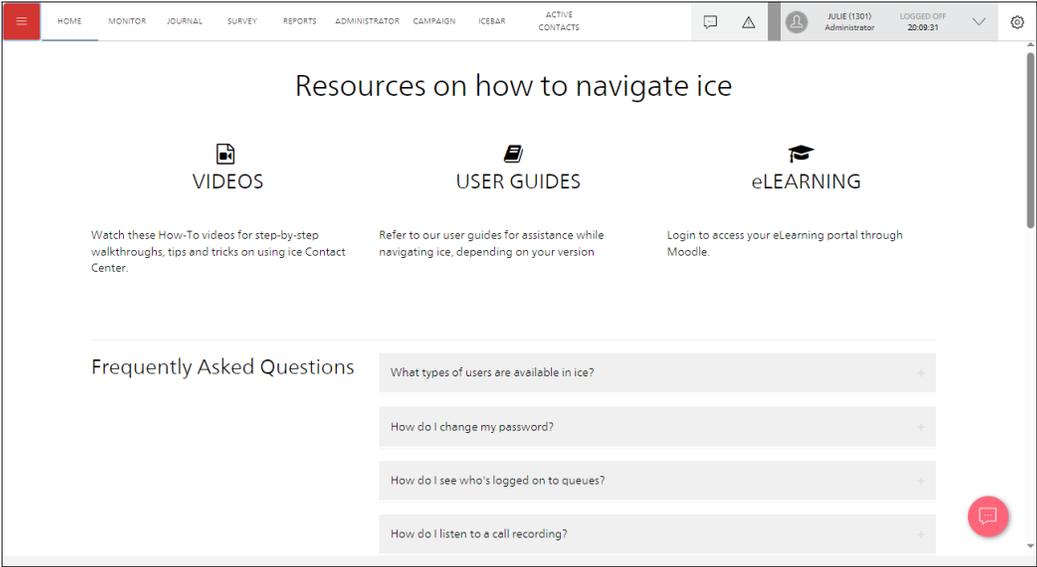


2. In the 'Username' field, enter your four-digit user ID.
3. In the 'Password' field, enter your password.
4. If you wish to view iceManager in a language other than English, click the dropdown and select the language of choice.
5. Select the 'Remember Me' check box if you want your Username to be pre-populated the next time you go to the Sign In page

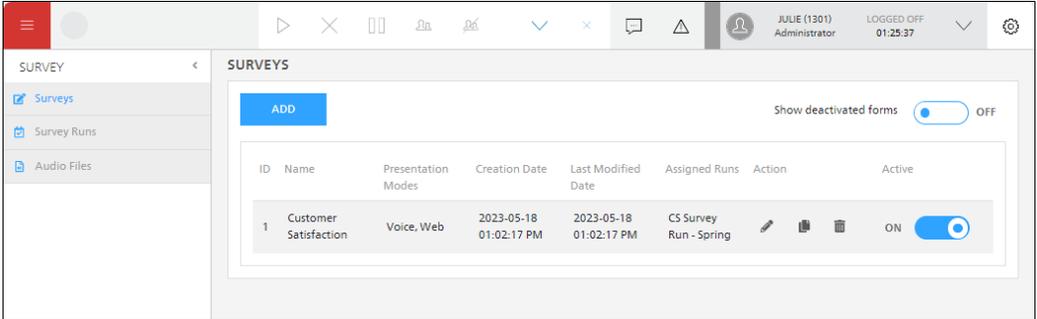
**Note:** this option is not recommended for shared computers.

6. Click Sign In.
7. Once you have signed in, you will see the home page.

Below is a screenshot of a sample home page.



8. Click on Survey button in the Navigation Pane.



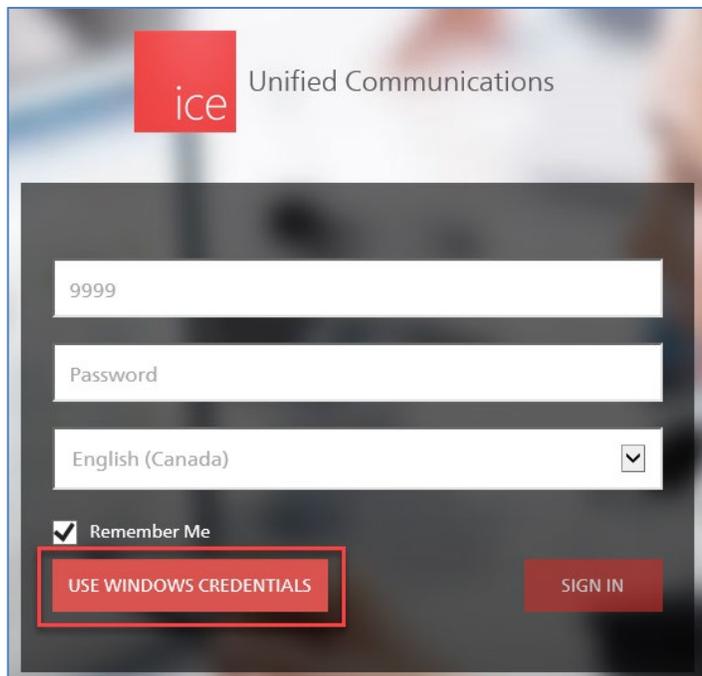
## Single Sign-On

If your organization has enabled Single Sign-On for iceManager, you will be able to sign on using your Windows credentials.

**Note:** To enable Single Sign-On, it will need to be configured using Active Directory in iceAdministrator. For further information on how to enable Single Sign-On, please review the *iceAdministrator User Manual*.

### Signing On with Single Sign-On

Once Single Sign-On is properly configured, launch the iceManager website, and click Use Windows Credentials button rather than entering the username and password.



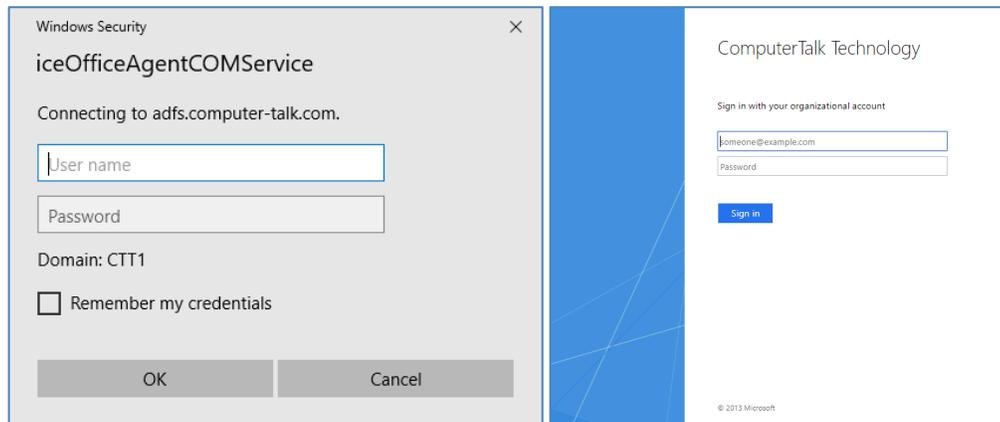
The screenshot shows the login interface for iceManager. At the top left is the 'ice' logo, and to its right is the text 'Unified Communications'. Below this is a dark grey login form with the following elements: a text input field containing '9999', a text input field labeled 'Password', a dropdown menu showing 'English (Canada)', a checked checkbox labeled 'Remember Me', a red button labeled 'USE WINDOWS CREDENTIALS' (highlighted with a red box), and another red button labeled 'SIGN IN'.

1. When you click OK, the Single Sign-On dialog box will appear.

**Note:** If you wish to skip this step for future logins, check the box for *Remember Me*. This way, you will not have to enter your user ID each time you sign in.

- To sign in with this method, you will use the same credentials that you use to log on to your computer or your company email. Enter your username and password in the boxes.

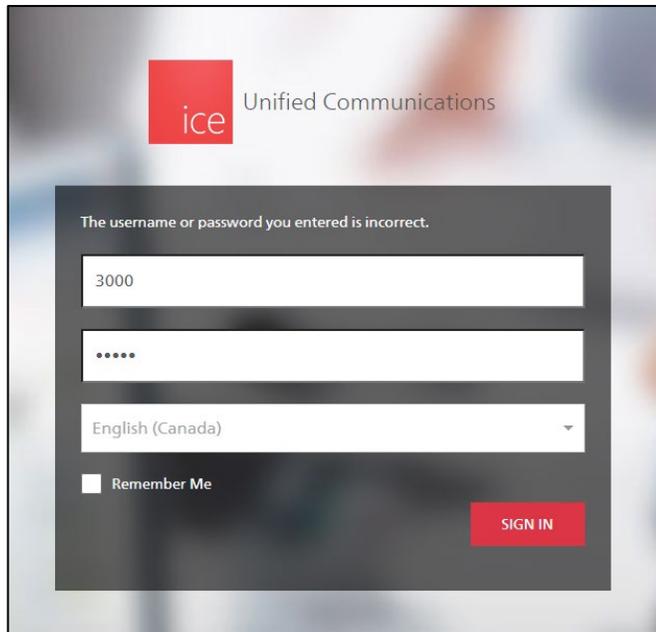
**Note:** This dialog box may look different, depending on the way your administrator has configured the system.



## Common Error and Warning Messages

### Authentication error

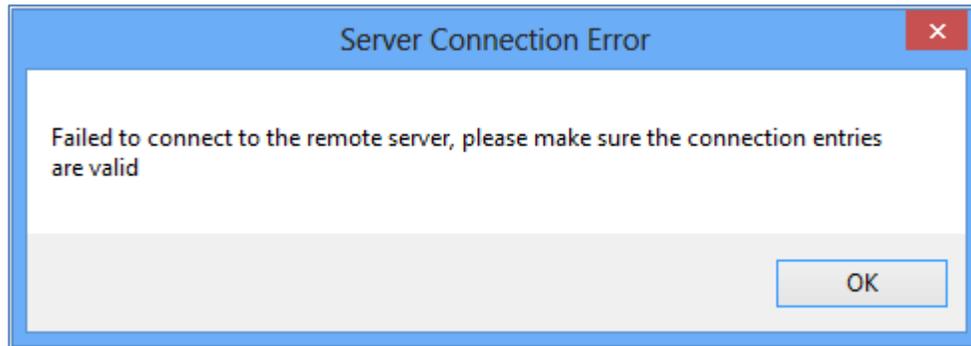
If a user types the wrong User ID or the wrong password, the following message appears.



If you cannot remember your password or User ID, an ice administrator can reset it in iceManager. For more information refer to the *iceManager User Manual*.

## Server Connection Error

iceManager must have network connectivity to the ice server through the IMRService to function properly. If your contact center experiences network problems, you may see this error message.

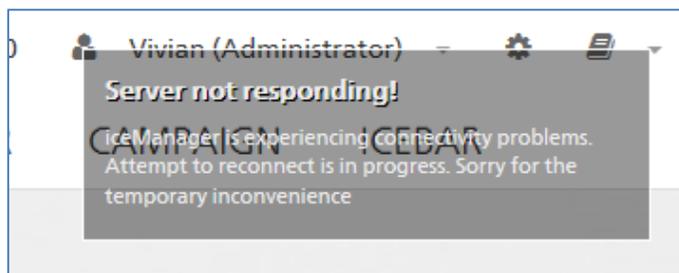


This error message indicates that the server needs to be restarted. Please contact your ice administrator.

## Loss of connection

A few seconds after connection is lost, an error message appears in the top right corner of the screen:

“Server not responding! iceManager is experiencing connectivity problems. Attempt to reconnect is in progress. Sorry for the temporary inconvenience”.



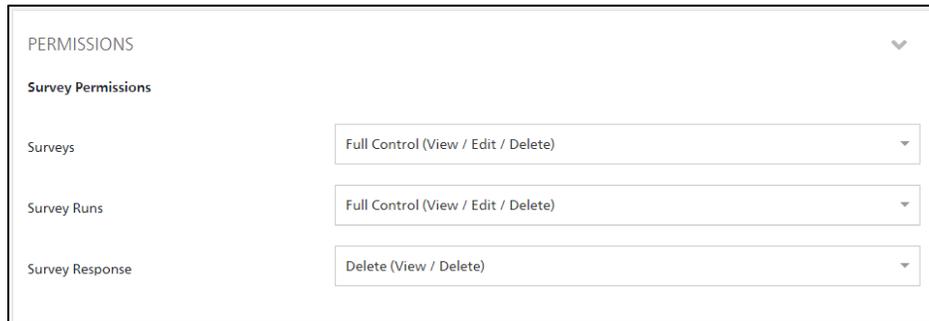
The message fades away after a few minutes. iceManager will keep attempting to reconnect until it is successful.

Verify that you are connected to the Internet. If you are connected, but still receive the Server not responding message, contact your ice administrator.

## User Roles in the iceSurvey Tool

Your ability to view, modify, and delete information and configuration options associated with all Surveys and Survey Runs is determined by your Configuration Group. Each Configuration Group can have access to View, Edit, or Delete the various aspects of a Survey.

The following shows the Survey Permissions sections of the Configuration Group properties page:



The screenshot shows a 'PERMISSIONS' section with a dropdown arrow. Below it is the 'Survey Permissions' section, which contains three rows of permissions:

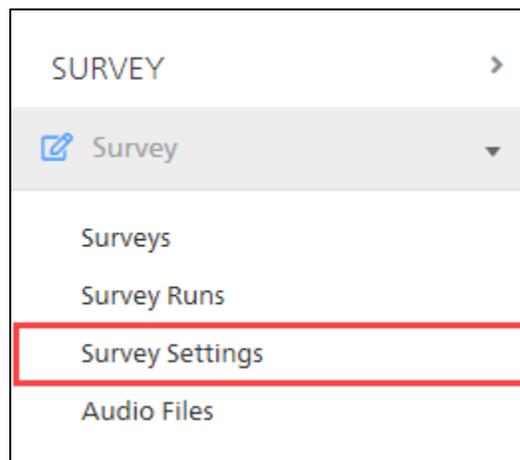
Category	Permissions
Surveys	Full Control (View / Edit / Delete)
Survey Runs	Full Control (View / Edit / Delete)
Survey Response	Delete (View / Delete)

For more information on how to manage Configuration Groups, refer to the *iceManager User Manual* for more details.

## Managing Settings

Only users configured as administrators can access the Survey Settings page.

To access this page, select Survey Settings on the left side:



## Voice Survey Settings

This section contains settings and configurations that will affect voice surveys. Voice surveys are only available for voice contacts. These settings will help manage and limit the options available for the various types of questions. Please refer to the table below for more information.

Parameter	Permissible Values	Description
<b>Maximum Audio Prompt File Size (MB)</b>	1 to 10 MB	Maximum allowable file size of an uploaded audio file in MegaBytes for Survey Questions and Completion Messages.
<b>Maximum Audio Response Length (sec)</b>	1 to 600 seconds	Enter maximum length of recording in seconds.
<b>Maximum Numeric Digits</b>	1 to 2147483647	Enter maximum number of digits for number responses.
<b>Maximum Numeric Range</b>	1 to 2147483647	Enter maximum number for range questions.
<b>Maximum Dropdown Options</b>	2 to 9	Enter maximum number of options for dropdown questions.
<b>Maximum Button Options</b>	2 to 9	Enter maximum number of options for button questions.
<b>Maximum Star Options</b>	2 to 9	Enter maximum number of options for star questions.
<b>Maximum Slider Increments</b>	2 to 9	Enter maximum number of options for slider questions.

## Web Survey Settings

This section contains settings and configurations that will affect web surveys. Web surveys are only available for IM and email contacts. These settings will help manage and limit the options available for the various types of questions. Please refer to the table below for more information.

Parameter	Permissible Values	Description
<b>Base URI</b>	Valid URL	Use this option to override the default Base URI used in the web survey link that is sent to web survey participants. <b>Note:</b> Default URI used is the iceManager URL.
<b>Maximum Text Input Characters</b>	1 to 4000 characters	Enter maximum characters for text responses.
<b>Maximum Numeric Digits</b>	1 to 2147483647	Enter maximum number of digits for number responses.
<b>Maximum Numeric Range</b>	1 to 2147483647	Enter maximum number for range questions.
<b>Maximum Dropdown Options</b>	1 to 2147483647	Enter maximum number of options for dropdown questions.
<b>Maximum Button Options</b>	1 to 2147483647	Enter maximum number of options for button questions.
<b>Maximum Star Options</b>	1 to 2147483647	Enter maximum number of options for star questions.
<b>Maximum Slider Increments</b>	1 to 2147483647	Enter maximum number of options for slider questions.

Global Settings allow you to enforce organizational policy, influence style, determine privacy protection, and present guidelines as it relates to Surveys managed through iceSurvey.

**Note:**

- Changing a Setting will not impact existing Surveys or Survey Runs.

- You cannot override these settings in the Survey and Survey Run pages.





## Chapter 2: Surveys

Surveys are composed of questions and **statements**. Statements are special case questions that do not require a response from survey participants.

To create a survey, you must determine the wording of Questions and pre-ambles (statements), which will be used to build Surveys. You can also specify parameters which are used to determine whether or not an answer is valid.

iceSurvey is a tool that allows users to assemble and evaluate Surveys. This includes facilities to select and order Questions, and finalize Surveys.

Once designed, the Survey form is assigned a unique identifier and stored in the iceSurvey repository.

This chapter describes how to create and manage questions in surveys.

**Note:** A Survey can support one or more languages. The language choices available to you are limited to the options selected by your ice Administrator.

## Managing Surveys

This section can only be viewed or modified by authorized users, as per the Configuration Group settings. For more information on how to manage Configuration Groups, refer to the *iceManager User Manual*.

All created surveys will be listed in this table. Surveys can be viewed, added, reactivated, deleted, and modified from the options provided.

ID	Name	Presentation Modes	Creation Date	Last Modified Date	Assigned Runs	Action	Active
1	Customer Service		2020-10-05 03:22:44 PM	2020-10-05 03:22:44 PM			ON <input checked="" type="checkbox"/>

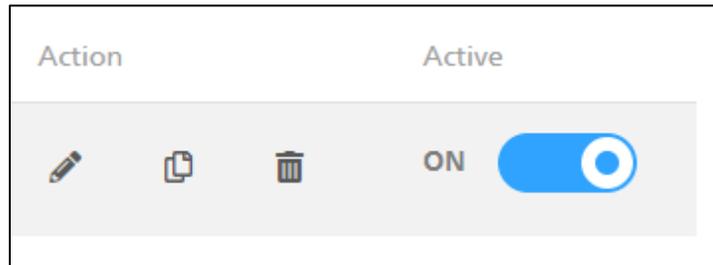
The table below explains each column:

Column	Description
ID	Identification number of the survey. Allows you to differentiate between surveys with the same name.
Name	Name of the survey. It is recommended that you provide a descriptive name less than 25 characters. Names over 25 characters may not fit the columns in survey reports.
Presentation Modes	The presentation modes selected for this survey – e.g., voice or web.
Creation Date	The date and time the survey was created.
Last Modified Date	The date and time the survey was last modified.
Assigned Runs	The Survey Run Names associated with this survey.
Action	Icons that you click to edit, copy, and delete existing survey forms.

**Active**

Toggle that allows you to activate or deactivate a survey.

The next section of this document describes the Actions that can be taken with a Survey.

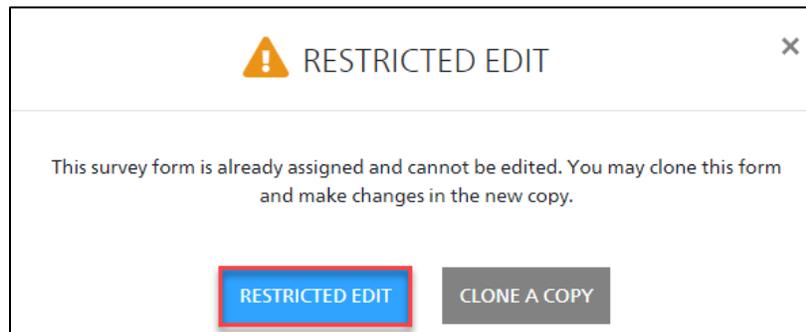


## Edit a Survey



To modify a survey click the pencil icon. Surveys can be modified freely until they are associated with a Survey Run that is in any state other than Draft. For more information on Survey Run states, please refer to the Survey Run Options table in Chapter 3: **Survey Runs**.

Once a Survey Run has changed from Draft state, clicking on the pencil icon will generate the following message.



**Note:** Modifying a Survey that is associated with a Survey Run will result in the deletion of all the Survey Responses associated with the Survey Run.

To ensure surveys and reports remain accurate, select the appropriate method.

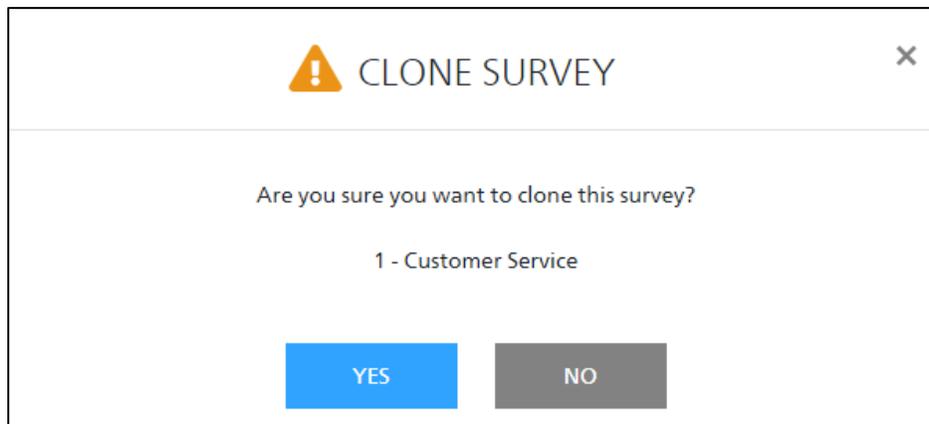
- **Restricted Edit:** Use this option to make modifications to the Survey Name or wording of a category or question.

- **Note:** You cannot modify any of the settings associated with a question or add any additional questions to the survey. These fields will be greyed out.
- Changes affect all the previous Survey responses and reporting.
- **Clone a Copy:** Use this option to duplicate the existing survey and modify all sections of the survey form.



## Clone a Survey

To Clone an existing survey, click the clone icon. A message appears, confirming the cloning of the selected survey.



Click 'Yes' to clone the survey. Click 'No' to cancel.

When selecting the Clone (copy) icon, a copy of the survey is created, with "(1)" appended to the name, to indicate this is the copy of the previous survey.

ID	Name	Presentation Modes	Creation Date	Last Modified Date	Assigned Runs	Action	Active
1	Customer Service		2020-10-05 03:22:44 PM	2020-10-05 03:22:44 PM	Customer Service Trial, Test Survey Run, Test 2		ON <input checked="" type="checkbox"/>
4	Customer Service(1)		2020-12-05 09:06:10 PM	2020-12-05 09:06:10 PM			ON <input checked="" type="checkbox"/>

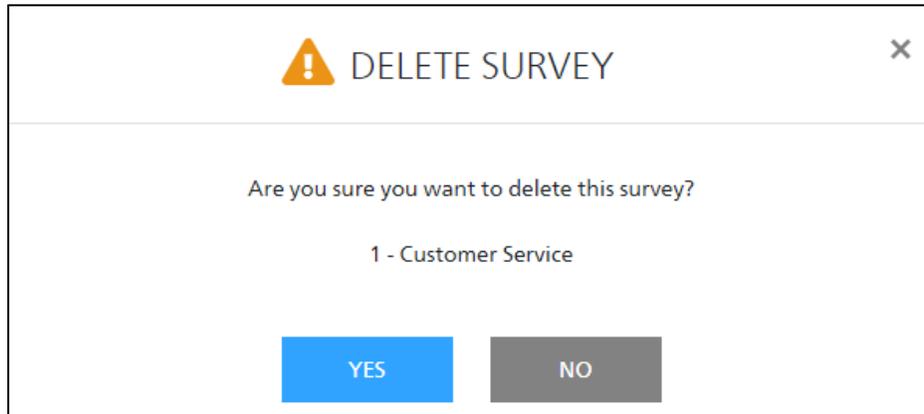
Cloning a survey duplicates the structure, using the original survey as a template.

Since this survey is not associated with any Survey Runs, all aspects of the survey can be modified freely. To edit the new survey click the pencil button.

## Delete a Survey



To delete the survey, click the trash can icon. A message appears, confirming the deletion of the selected survey.

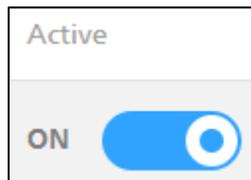


Click 'Yes' to proceed with the deletion. Click 'No' to cancel the deletion.

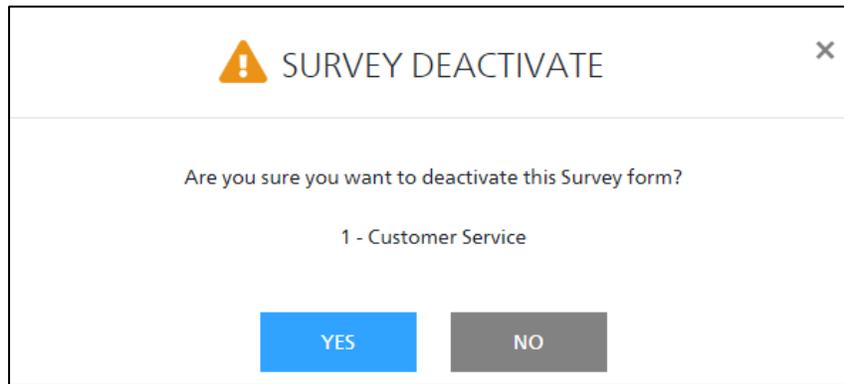
**Important:** Once a survey is deleted, all data associated with the survey, including Survey Responses, will no longer be accessible through iceReporting.

## Deactivate a Survey

To deactivate the survey, flip the Active toggle off.

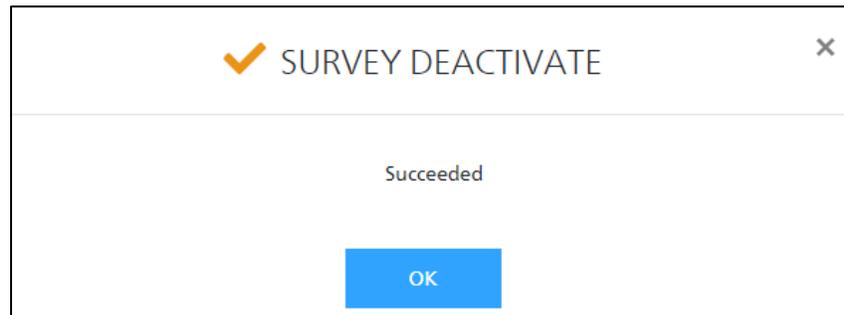


A message appears, confirming the deactivation of the selected survey.



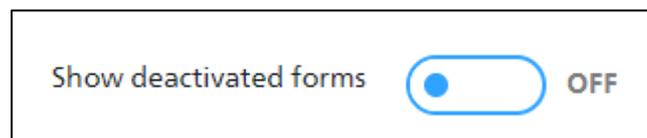
To proceed, click 'Yes.' To cancel, click 'No.'

Clicking 'Yes' will prompt a success message. Click 'OK' to close this message window.



**Note:** Deactivation of a Survey associated with an active Survey Run will result in the transition of the Survey Run to Suspended state. For more information on Survey Run states, please refer to the Survey Run Options table in Chapter 3: **Survey Runs**.

To view all deactivated forms, toggle Show deactivated forms.



Rather than delete survey forms, it is highly recommended that you deactivate survey forms.

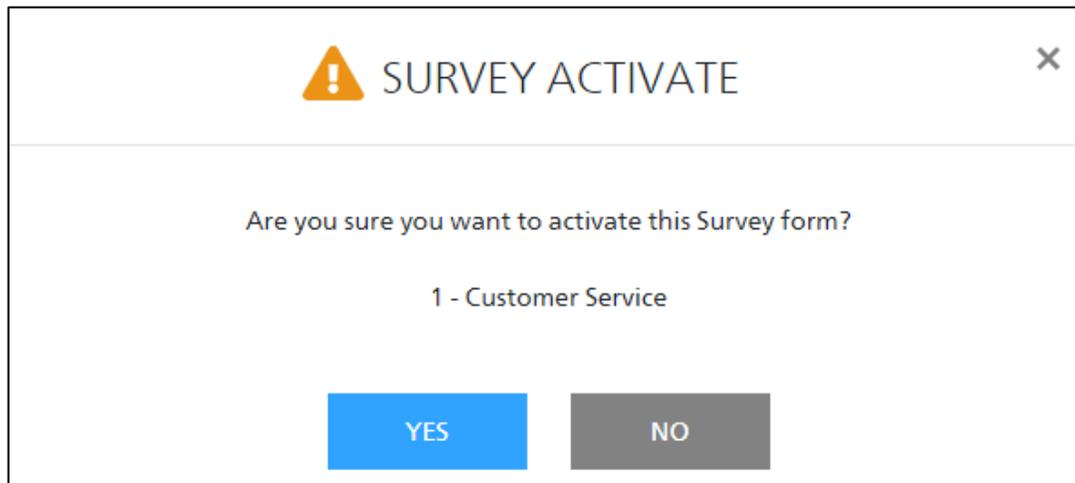
**Caution:** Once a survey is deleted, all data collected, including Survey Responses will also be deleted.

**SURVEYS**

[ADD](#) Show deactivated forms  ON

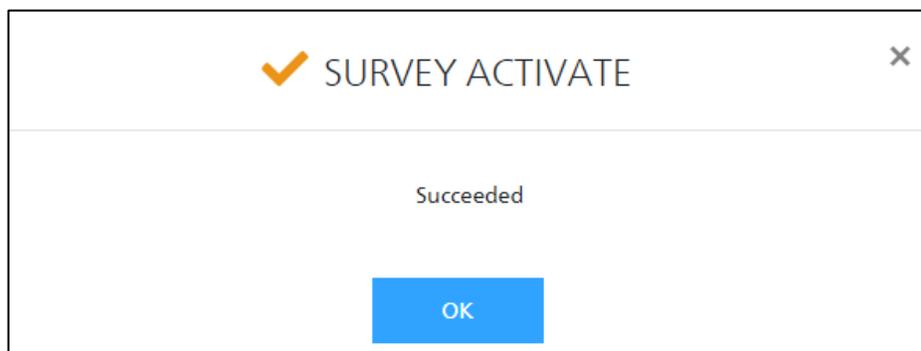
ID	Name	Presentation Modes	Creation Date	Last Modified Date	Assigned Runs	Action	Active
1	Customer Service		2020-10-05 03:22:44 PM	2020-10-05 03:22:44 PM		  	ON <input checked="" type="checkbox"/>
2	Test Survey		2020-10-08 08:53:42 AM	2020-10-08 08:53:42 AM		  	OFF <input type="checkbox"/>

To reactivate a form, toggle the Active switch On. A confirmation message appears.



To proceed, click 'Yes'. To cancel, click 'No'.

Clicking 'Yes' will prompt a success message. Click 'OK' to close this message window.



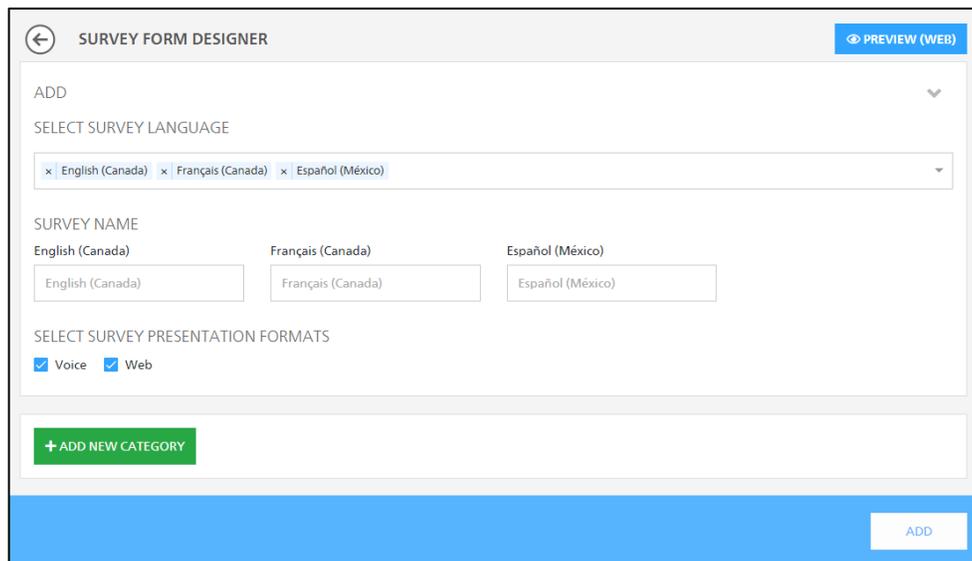
**Important:** A deactivated survey and all data associated with the survey, including Survey Responses, are still accessible through iceReporting.

## Create a new Survey

To create a new survey, complete the following steps:

1. Click 'Add'.

The survey form designer appears.



The screenshot shows the 'SURVEY FORM DESIGNER' interface. At the top left is a back arrow icon and the title 'SURVEY FORM DESIGNER'. At the top right is a 'PREVIEW (WEB)' button. Below the title is an 'ADD' button with a dropdown arrow. Underneath is the 'SELECT SURVEY LANGUAGE' section, which contains a list of selected languages: 'English (Canada)', 'Français (Canada)', and 'Español (México)'. Each language has a small grey 'x' icon to its left. Below this is the 'SURVEY NAME' section, which has three input fields corresponding to the selected languages: 'English (Canada)', 'Français (Canada)', and 'Español (México)'. Below that is the 'SELECT SURVEY PRESENTATION FORMATS' section, with two checked checkboxes: 'Voice' and 'Web'. At the bottom left of the form is a green button labeled '+ ADD NEW CATEGORY'. At the bottom right of the entire interface is a large blue bar containing an 'ADD' button.

2. Remove the languages that you will not use by clicking the grey 'x' next to them. The Form Name fields for the languages you remove will automatically disappear. The survey must be created in one survey language at a minimum.

The screenshot shows the 'SURVEY FORM DESIGNER' interface. At the top, there is a back arrow, the title 'SURVEY FORM DESIGNER', and a 'PREVIEW (WEB)' button. Below this is an 'ADD' button with a dropdown arrow. The 'SELECT SURVEY LANGUAGE' section contains a dropdown menu with three selected items: 'English (Canada)', 'Français (Canada)', and 'Español (México)'. The 'SURVEY NAME' section has three input fields: 'English (Canada)', 'Français (Canada)', and 'Español (México)'. The 'SELECT SURVEY PRESENTATION FORMATS' section has two checked checkboxes: 'Voice' and 'Web'. At the bottom of the form area is a green '+ ADD NEW CATEGORY' button. A blue bar at the very bottom contains an 'ADD' button.

3. Enter the name of the form. For optimal reporting display, length of name should not exceed 25 characters.
4. Select the presentation format for this survey, either Voice, Web, or both.

This screenshot is identical to the one above, but with a red rectangular box highlighting the 'SELECT SURVEY PRESENTATION FORMATS' section, which includes the 'Voice' and 'Web' checkboxes.

**Note:** If the survey will be used for email or IM contacts, the web presentation mode must be selected.

5. Click 'Add New Category' to add a new group of questions. Fill in the name field(s).

The screenshot shows the 'SURVEY FORM DESIGNER' interface. At the top left is a back arrow icon and the title 'SURVEY FORM DESIGNER'. At the top right is a 'PREVIEW (WEB)' button. Below the title is an 'ADD' dropdown menu. The 'SELECT SURVEY LANGUAGE' section contains a dropdown menu with three selected items: 'English (Canada)', 'Français (Canada)', and 'Español (México)'. The 'SURVEY NAME' section has three input fields for each language: 'English (Canada)', 'Français (Canada)', and 'Español (México)'. The 'SELECT SURVEY PRESENTATION FORMATS' section has two checked checkboxes: 'Voice' and 'Web'. At the bottom of the main content area is a green '+ ADD NEW CATEGORY' button. At the bottom right of the entire interface is a blue 'ADD' button.

5. To add a question, click 'Add New Question'.

This screenshot is similar to the previous one but shows the 'CATEGORY 0' section expanded. It includes the same language and name fields as above. Below the 'SELECT SURVEY PRESENTATION FORMATS' section, there is a 'CATEGORY 0' section with three input fields for each language: 'English (Canada)', 'Français (Canada)', and 'Español (México)'. To the right of these fields are icons for copy, delete, expand, and collapse. Below the category fields is a red '+ ADD NEW QUESTION' button, which is highlighted with a red box. Below that is a green '+ ADD NEW CATEGORY' button. The blue 'ADD' button remains at the bottom right.

The question area expands to show additional options.

6. Click 'Type' to change the type of question that will be used in the Survey.
7. Depending on the question type selected, configure the question settings and branching.

**Note:** Branching does not apply to Statement or Text questions. When no branching option is provided for a question, the survey will automatically moved to the next question in the survey.

Rule #	Condition	Branch To	Action

The table below provides information on the fields and buttons found on this page:

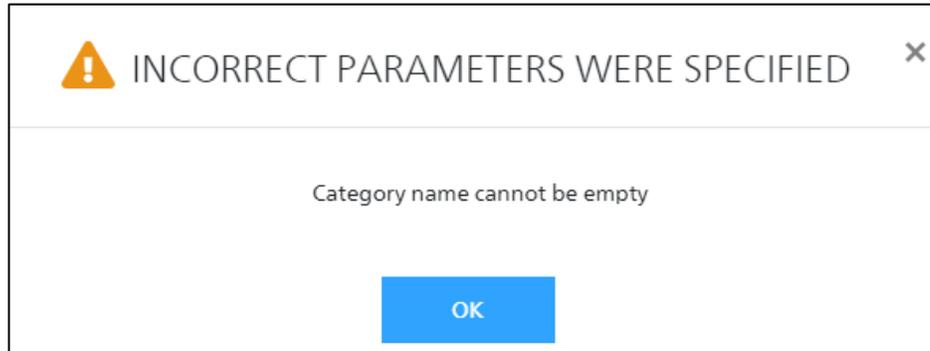
Parameter	Permissible Values	Description
Select Survey Language	Languages configured in the system	Select one or more languages from the options provided. There must be a minimum of one language selected.
Survey Name	Free text	Enter form name.
<b>Category</b>		
Category Name	Free text	Enter category name.
<b>Question</b>		
Question Text	Free text	Enter the question.
For Voice	<ul style="list-style-type: none"> <li>▪ Use Display Text</li> <li>▪ Use Custom Text</li> <li>▪ Use Audio File</li> </ul>	<p>Select one of the audio options for the question. Use Display Text and Use Custom Text will use Text to Speech (TTS) to record the audio for the question. If you select Use Audio File refer to the Audio Files section for instructions on how to add a new audio file to iceManager.</p> <p><b>Note:</b> This field only applies to Voice presentation mode.</p>
Type	<ul style="list-style-type: none"> <li>▪ Statement</li> <li>▪ Stars</li> <li>▪ Button</li> <li>▪ Drop Down</li> <li>▪ Slider</li> <li>▪ Text</li> <li>▪ Numeric</li> </ul>	Select one of the types.
Optional/Mandatory	Optional/Mandatory	<p>Select to make question optional or mandatory.</p> <p><b>Note:</b> Not available for Statement type. If a question is made optional, participants can skip the question using the star (*) key.</p>
Count the score for the question?	On/Off	<p>Select to include scoring for the question.</p> <p><b>Note:</b> Only available for Stars, Button, Drop Down and Slider types.</p>
Number of Options	2 to N	<p>Enter the number of increments, reflecting how each star, button, dropdown or slider marker increments in score value.</p> <p>The maximum number of increments for each Question Type depends on the maximum values</p>

Parameter	Permissible Values	Description
		<p>set in the Survey Settings page and the presentation mode of the selected survey.</p> <p><b>Note:</b></p> <ul style="list-style-type: none"> <li>▪ If a survey has a presentation mode of Web only or Voice only, the maximum number of options is in accordance with the Survey Settings page.</li> <li>▪ If a survey has both Web and Voice presentation modes, the maximum number of options is in accordance with the lower limit as set in the Survey Settings page.</li> </ul>
<b>Minimum Score</b>	0 to N	<p>Enter the minimum score value.</p> <p>Note: Only available for Stars, Button, Drop Down and Slider types.</p>
<b>Maximum Score</b>	1 to N	<p>Enter the maximum score value. This does not necessarily correspond to the number of stars or buttons displayed. See Number of Increments.</p> <p>Note: Only available for Stars, Button, Drop Down and Slider types.</p>
<b>Start Value (Voice Only)</b>	0 to N	<p>Enter the starting value for the question.</p> <p><b>Note:</b></p> <ul style="list-style-type: none"> <li>▪ This field only applies to Slider Voice questions.</li> <li>▪ <math>N = \text{Voice Maximum Slider Increments} - \text{Number of Options} + 1</math></li> </ul>
<b>Minimum Value (Web Only)</b>	0 to N	<p>Enter the minimum value for the question.</p> <p>Note: This field only applies to Slider Web questions.</p>
<b>Maximum Value (Web Only)</b>	M to N	<p>Enter the maximum value for the question.</p> <p><b>Note:</b></p> <ul style="list-style-type: none"> <li>▪ This field only applies to Slider Web questions.</li> <li>▪ <math>M = \text{Minimum Value} + 1</math></li> </ul>

Parameter	Permissible Values	Description
<b>Multi-line input? (Web Only)</b>	Off/On	Select to allow multi-line input for this question. Note: This field only applies to Text questions
<b>Expected input format</b>	Regex String	Enter the expected input format for this question. Note: This field only applies to Text Web questions
<b>Minimum input chars</b>	1 to N	Enter minimum number of characters that must be inputted for this question. <b>Note:</b> <ul style="list-style-type: none"> <li>This field only applies to Text Web questions</li> <li>N = Maximum Text Input Characters set in the Survey Setting page</li> </ul>
<b>Maximum input chars</b>	1 to N	Enter the maximum number of characters that can be inputted for this question. <b>Note:</b> <ul style="list-style-type: none"> <li>This field only applies to Text Web questions</li> <li>N = Maximum Text Input Characters set in the Survey Setting page</li> </ul>
<b>Maximum recording length (sec)</b>	1 to N	Enter the maximum length of recording input for this question. <b>Note:</b> <ul style="list-style-type: none"> <li>This field only applies to Text Voice questions</li> <li>N = Maximum Audio Response Length set in the Survey Setting page</li> </ul>
<b>Minimum Number</b>	1 to N	Enter the minimum number for this question. <b>Note:</b> <ul style="list-style-type: none"> <li>This field only applies to Number questions.</li> <li>N = Maximum Numeric Range set in the Survey Setting page</li> </ul>

Parameter	Permissible Values	Description
Maximum Number	1 to N	Enter the maximum number for this question. <b>Note:</b> <ul style="list-style-type: none"> <li>This field only applies to Number questions.</li> <li>N = Maximum Numeric Range set in the Survey Setting page</li> </ul>
Minimum number of digits	1 to 10	Enter the minimum number of digits for this question. <b>Note:</b> <ul style="list-style-type: none"> <li>This field only applies to Number questions.</li> <li>N = Maximum Numeric Digits set in the Survey Setting page</li> </ul>
Maximum number of digits	1 to 10	Enter the Maximum number of digits for this question. <b>Note:</b> <ul style="list-style-type: none"> <li>This field only applies to Number questions.</li> <li>N = Maximum Numeric Digits set in the Survey Setting page</li> </ul>
<b>Branching Configuration</b>		
Manually input condition string	On/Off	Select to manually input the branching conditions.
If Input	Comparators and Text	Select a comparator and enter the comparing value. For example "= 5". <b>Note:</b> <ul style="list-style-type: none"> <li>Enter a number for Numeric question only.</li> <li>Enter corresponding option number from the dropdown for all other question types.</li> </ul>
Branch To	Questions configured in the survey	Select a question in the dropdown list. If no questions follow the current one, select End Survey.

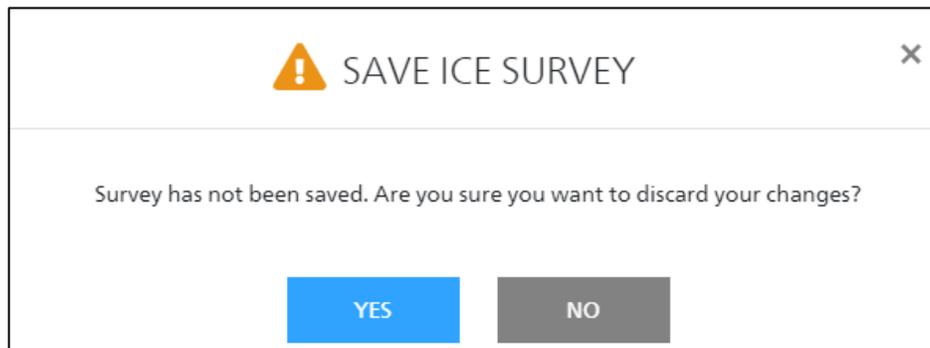
- Once you are finished, click 'Add' button found at the bottom of the page, to save the new survey. If any fields in the survey are incomplete the system will display an error message identifying the error.



All necessary fields must be completed before the survey form can be saved.

If you wish to cancel this form, click the back arrow next to Survey Form Designer at the top of the form page.

If you click the back arrow, the following message appears.



Click 'Yes' to cancel the survey form. Click 'No' to continue modifying the survey form.

## Types of Questions

### Statement

Statements are preambles that do not accept responses from participants. You can use statements to provide legal notice, explanations, and introductory and concluding statements.

The screenshot shows the configuration for a Statement question. At the top, it is labeled "QUESTION 0". Below this, there are language selection tabs for "English (Canada)", "Français (Canada)", and "Español (México)". The "Display Question Text" field contains the text: "Welcome to the ABCD customer experience survey. We value your feedback." Below the text field, there are three radio buttons for "For Voice": "Use Display Text" (selected), "Use Custom Text", and "Use Audio File". The "Type" dropdown menu is set to "Statement". At the bottom, there is a "PREVIEW (WEB)" section showing the rendered text: "Welcome to the ABCD customer experience survey. We value your feedback."

### Stars

Star questions require a participant to respond by using a rating scale. The response will be selected using the stars displayed. The score values can be adjusted using the Minimum Score and Maximum Score fields. You must have a minimum of two options and the total number of options cannot exceed the Maximum Star Options as set in the Survey Settings page.

The screenshot shows the configuration for a Stars question. At the top, it is labeled "QUESTION 0". Below this, there are language selection tabs for "English (Canada)", "Français (Canada)", and "Español (México)". The "Display Question Text" field contains the text: "On a scale of 1 to 5, with 1 meaning very unsatisfied and 5 meaning exceeding expectations, how would you rate your experience with the customer service representative you spoke with today?" Below the text field, there are three radio buttons for "For Voice": "Use Display Text" (selected), "Use Custom Text", and "Use Audio File". The "Type" dropdown menu is set to "Stars". Below the "Type" dropdown, there are several settings: "Optional" is set to "ON" with a toggle switch; "Count the score for this question?" is set to "ON" with a toggle switch; "Number of Options" is set to "5"; "Minimum Score" is set to "0"; and "Maximum Score" is set to "100". At the bottom, there are sections for "QUESTION CHOICES" and "BRANCHING CONFIGURATION", both with upward-pointing arrows.

## Button

Button questions require the participant to select one response from a list of predefined responses. The options will be displayed as buttons. The score values for each option can be adjusted using the Minimum Score and Maximum Score fields. You must have a minimum of two options and the total number of options cannot exceed the Maximum Button Options as set in the Survey Settings page.

The screenshot shows the configuration interface for a Button question. The question text is "Why are you purchasing this product?". The type is set to "Button", and it is optional. The "Count the score for this question?" toggle is turned off. The number of options is set to 3, with a minimum score of 0 and a maximum score of 0. The question choices are listed as follows:

	Score	English (Canada)
Option 1	0	Business-related
Option 2	0	Personal
Option 3	0	Gift

## Dropdown

Dropdown questions require the participant to select one response from a list of predefined responses. The options will be displayed in a dropdown list. The score values for each option can be adjusted using the Minimum Score and Maximum Score fields. You must have a minimum of two options and the total number of options cannot exceed the Maximum Dropdown Options as set in the Survey Settings page.

QUESTION 0

Question Text

English (Canada)

Display Question Text

Why are you purchasing this product?

For Voice:  Use Display Text  Use Custom Text  Use Audio File

Type: Dropdown

Optional: ON

Count the score for this question?: OFF

Number of Options: 3

Minimum Score: 0

Maximum Score: 0

QUESTION CHOICES

	Score	English (Canada)
Option 1	0	Business-related
Option 2	0	Personal
Option 3	0	Gift

BRANCHING CONFIGURATION

## Slider

Slider questions require a participant to respond by using a rating scale. The response will be selected using the slider displayed. The score values can be adjusted using the Minimum Score and Maximum Score fields. You must have a minimum of two options and the total number of options cannot exceed the Maximum Slider Options as set in the Survey Settings page.

QUESTION 0

Question Text

English (Canada)

Display Question Text

On a scale of 1 to 5, with 1 meaning very unsatisfied and 5 meaning exceeding expectations, how would you rate your experience with the customer service representative you spoke with today.

For Voice:  Use Display Text  Use Custom Text  Use Audio File

Type: Slider

Optional: ON

Count the score for this question?: ON

Number of Options: 5

Minimum Score: 0

Maximum Score: 100

Start Value (Voice): 0

Minimum Value (Web): 0

Maximum Value (Web): 100

QUESTION CHOICES

BRANCHING CONFIGURATION

## Text

Text questions allow for custom responses from participants. For Voice surveys, this type of question requires a spoken answer. The response is recorded and stored as a .wav file in the specified data store location. For more information on Data Stores, please refer to the *iceManager User Manual*. For Web surveys, this type of question requires a typed answer. You can use Text questions to receive open-ended feedback.

The screenshot shows the configuration interface for a Text question. At the top, there are language tabs for English (Canada), Français (Canada), and Español (México). Below this is a text area for the question text: "Please describe your overall satisfaction of the service you received today." Underneath the text area are three radio buttons for voice recording: "Use Display Text" (selected), "Use Custom Text", and "Use Audio File". The "Type" dropdown is set to "Text". There are two toggle switches: "Optional" (ON) and "Multi-line input?" (OFF). Below these is a field for "Expected input format" with the placeholder "Regex String (ex. /abc/i)". At the bottom, there are four input fields: "Minimum input chars" (1), "Maximum input chars" (1000), "Maximum recording length (sec)" (600), and "Maximum number of digits" (10).

## Numeric

Numeric questions require a participant to enter a number. The response will be entered using the keypad on the phone set or on the computer. The acceptable values can be adjusted using the Minimum Number and Maximum Number fields. The number of digits can be adjusted using the Minimum Number of Digits and Maximum Number of Digits fields.

The screenshot shows the configuration interface for a Numeric question. At the top, there are language tabs for English (Canada), Français (Canada), and Español (México). Below this is a text area for the question text: "How many items did you purchase?". Underneath the text area are three radio buttons for voice recording: "Use Display Text" (selected), "Use Custom Text", and "Use Audio File". The "Type" dropdown is set to "Numeric". There are two toggle switches: "Optional" (ON) and "Multi-line input?" (OFF). Below these are four input fields: "Minimum number" (0), "Maximum number" (10), "Minimum number of digits" (1), and "Maximum number of digits" (10).

## Question Design Rules-of-Thumb

The following are helpful hints in designing Questions and pre-ambles:

1. Avoid long Questions.

**Long question:** "If while talking with the customer service representative you found yourself unable to consistently understand them or needed to ask them to explain further or had to be transferred to someone else for help, press 1. Otherwise, press 2."

**Improvement:** "If communication with the customer service representative was unclear and difficult to understand, press 1. Otherwise, press 2."

2. Avoid negative phrasing.

**Example:** "Did the representative not send the document on time?"

**Improvement:** "Did you receive the requested document on time?"

3. Avoid jargon except when it is absolutely necessary.

**Example:** "Did the TFT LCD hi-res flat screen satisfy your requirements?"

**Improvement:** "Did the flat screen you purchased meet your needs?"

4. Avoid date-specific or unnecessarily specific Questions to eliminate having to re-record and modify Questions and pre-ambles in the future.

**Example:** "Do you plan to purchase a dual-core computer in 2020?"

**Improvement:** "Do you plan on purchasing a computer this calendar year?"

## Survey Design Rules-of-Thumb

The following are helpful hints in designing surveys:

- For voice surveys, include instructions to skip a question, or return to the previous question in a preamble message. For questions that are set as 'optional', the star (\*) key allows participants to skip the question. To return to the previous question after submitting an answer, participants can use the pound (#) key. **Note:** You can not re-submit a voice recording (text) question once it starts recording.
- Put the most important Questions first. Partially completed Surveys will still yield valuable information.

**Example:** “Did the sales staff ask if they can assist you with anything else, press 1 for yes, press 2 for no, or press 3 if this does not apply to your experience.”

**Improvement:** “On a scale of 1 to 5, where 1 means unsatisfactory and 5 is excellent, how would you describe your experience with the sales staff?”

The second Question will generate more valuable answers on its own than the first Question because it does not rely on other responses to make sense.

- Group Questions of the same type together and place a pre-amble before these groups, to avoid repeating certain words.

**Example:** Place several range Questions together. Instead of providing participants with an explanation for what the rating scale is, before every Question, place these instructions in a pre-amble before the range Questions.

- Keep ranges and scales consistent. If you start providing Questions with response options in a negative-to-positive direction of scale, keep it throughout.

**Example:**

Question 1: on a scale of 1 to 5, with *1 meaning extremely unsatisfied* and 5 meaning very satisfied.

Question 3: on a scale of 1 to 5 with *1 meaning very satisfied* and 5 meaning extremely unsatisfied.

**Improvement:**

Question 1: on a scale of 1 to 5, with *1 meaning extremely unsatisfied* and 5 meaning very satisfied.

Question 3: on a scale of 1 to 5, with *1 meaning extremely unsatisfied* and 5 meaning very satisfied.

This will provide participants with a consistent scale, so they are more likely to enter the responses they intended.

- Use as few Question types as possible.
- Avoiding switching between Question types.
- Where possible, to decrease the amount of manual post-Survey analysis that needs to be completed, avoid using Verbal Questions.

It is important that Surveys are consistently organized so that iceSurvey remains easy to use in the future.





## Chapter 3: **Survey Runs**

A Survey Run is used to schedule, activate, and manage all properties associated with the target participants.

To define a Survey Run, select an existing Survey definition from the iceSurvey repository and add criteria for managing the execution of that Survey. You will specify the Survey mode, timing of the Survey Run, target response volumes, and participant selection criteria.

Survey Run Managers can initiate, suspend, or conclude Survey Runs.

Once defined, the Survey Run is stored in the iceSurvey Run repository and is identified by a unique SurveyRun ID and the Survey Run Name that you specify as part of the definition. Most Survey Run parameters can be adjusted while a Survey Run is active.

## Managing Survey Runs

This section can only be viewed or modified by authorized users, as per the Configuration Group settings. For more information on how to manage Configuration Groups, refer to the *iceManager User Manual*.

All created surveys runs will be listed in this table. Surveys runs can be viewed, added, reactivated, deleted, and modified from the options provided.

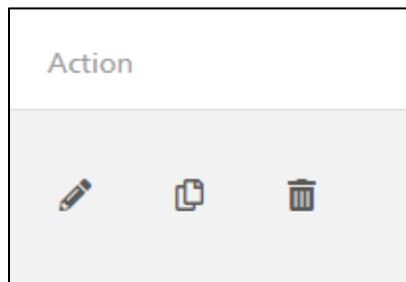
ID	Name	Associated Survey	Run State	Contact Modality	Presentation Modality	Pending Offers	Offers	Responses	Start Date	End Date	Action
1	Customer Service Trial	Customer Service	Draft	Any	Voice	0	0 / Unlimited	0 / Unlimited	Unlimited	Unlimited	  
2	Test Survey Run	Customer Service	Completed	Any	Voice	0	0 / Unlimited	0 / Unlimited	2020-10-12 11:19 AM	2020-12-09 02:00 AM	  

The table below explains each column:

Column	Description
ID	Identification number of the survey run. Allows you to differentiate between survey runs with the same name.
Name	Name of the survey run. It is recommended that you provide a descriptive name that is below 25 characters. Names over 25 characters may not fit the columns in survey reports.
Contact Modality	The contact modality on which the contact qualifies.
Presentation Modality	The modality that the survey will be offered to the user on. Options include Voice, Email, and Default. <b>Note:</b> Default option follows the contact modality. <ul style="list-style-type: none"> <li>▪ Calls will receive a voice survey.</li> <li>▪ IMs will receive a link to the web survey in the chat window.</li> <li>▪ Emails will receive a link to the web survey in an email.</li> </ul>

Run State	The state of the survey run. Options include Draft, Draft Suspended, Active, Suspend, and Completed.
Pending Offers	The number of contacts that have qualified for this Survey Run that have yet to be presented the survey.
Offers	The number of times the survey has been offered for this survey run.
Responses	The number of responses received for this survey run.
Start Date	Start date of this survey run.
End Date	Date after which this Survey Run will cease to offer.
Action	Icons that you click to edit, clone, and delete existing survey run forms.

The next section of this document describes the Actions that can be taken with a Survey Run.

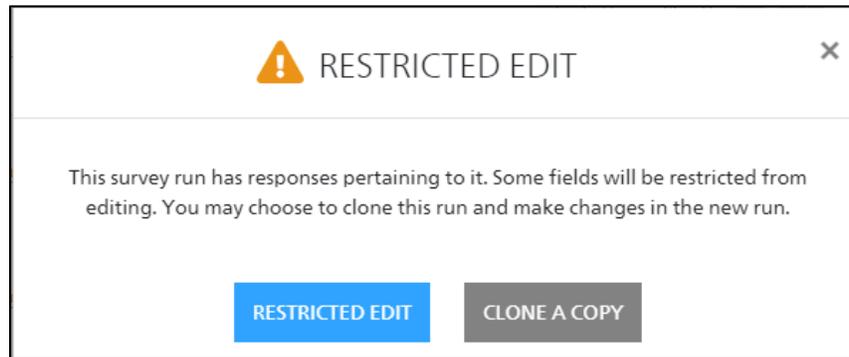


## Edit a Survey Run



To edit an existing survey run, click the pencil. The survey run form appears, and you can proceed to edit the necessary sections.

Once a Survey Run has changed at least 1 Survey response, clicking on the pencil icon will generate the following message.

**Note:**

- Completed Survey Runs cannot be modified. Instead the view icon  can be used to view the configurations of the Survey Run.
- In Restricted Edit mode you cannot modify the Associated Survey or the Run Start Date fields.

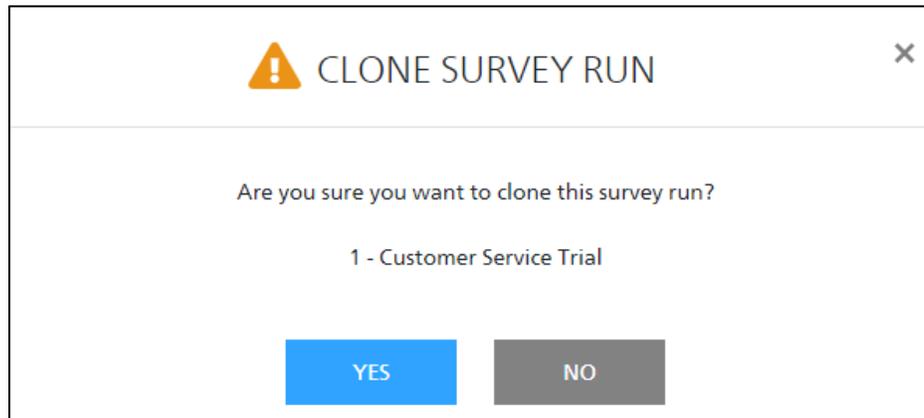
To ensure surveys and reports remain accurate, select the appropriate method.

- **Restricted Edit:** Use this option to make modifications to select fields within the Survey Run.
- **Clone a Copy:** Use this option to duplicate the existing survey run and modify all sections of the survey form. Create a clone puts the new Survey Run into a Draft state.

## Clone a Survey Run



To Clone an existing survey run, click the clone icon. A message appears, confirming the cloning of the selected survey.



Click 'Yes' to clone the survey run. Click 'No' to cancel.

When selecting the Clone (copy) icon, a copy of the survey run is created, with "(1)" appended to the name, to indicate this is the copy of the previous survey run. The state of the new Survey Run will be set as Draft. To activate the Survey Run click the Pencil icon to Edit the survey run form.

ID	Name	Presentation Modes	Creation Date	Last Modified Date	Assigned Runs	Action	Active
1	Customer Service		2020-10-05 03:22:44 PM	2020-10-05 03:22:44 PM	Customer Service Trial, Test Survey Run, Test 2		ON <input checked="" type="checkbox"/>
4	Customer Service(1)		2020-12-05 09:06:10 PM	2020-12-05 09:06:10 PM			ON <input checked="" type="checkbox"/>

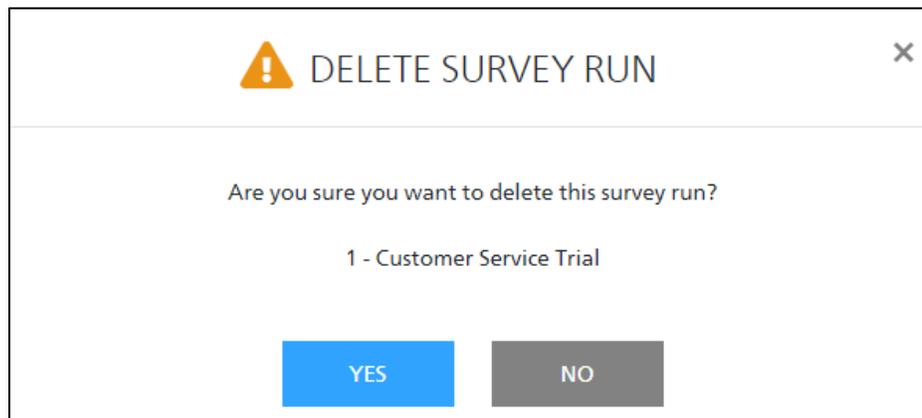
Cloning a survey duplicates the structure, using the original survey as a template.

Since this survey is not associated with any Survey Runs, all aspects of the survey can be modified freely. To edit the new survey click the pencil button.



## Delete a Survey Run

To delete the survey run, click the garbage can icon. When you click the garbage can icon, an "Are you sure you want to delete this Survey Run?" message appears.

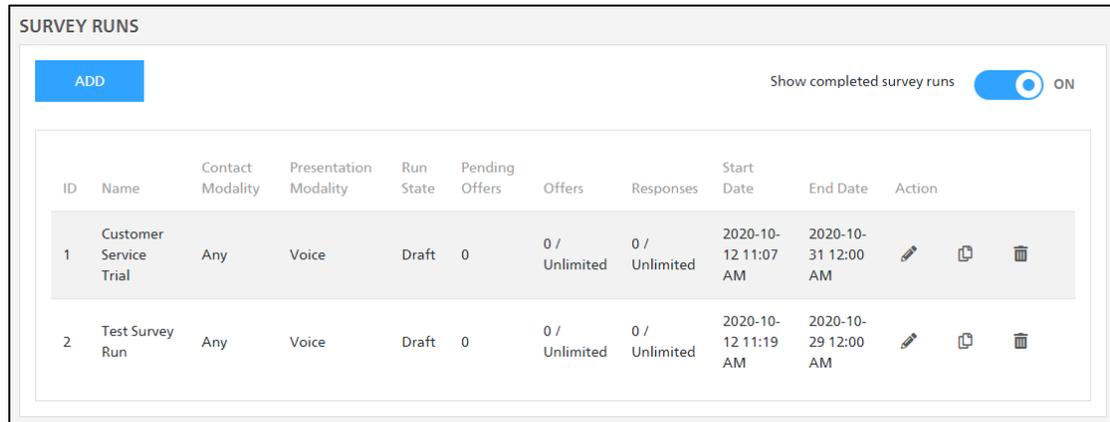


Click yes to proceed with the deletion. Click No to cancel the deletion.

**Important:** Once a survey run is deleted, all data associated with the survey run, including Survey Responses, will no longer be accessible through iceReporting.

## Completed Survey Runs

To view all completed survey runs, toggle Show completed survey runs.



The screenshot shows the 'SURVEY RUNS' interface. At the top left is a blue 'ADD' button. At the top right is a toggle switch labeled 'Show completed survey runs' which is currently turned 'ON'. Below this is a table with the following columns: ID, Name, Contact Modality, Presentation Modality, Run State, Pending Offers, Offers, Responses, Start Date, End Date, and Action. The table contains two rows of data.

ID	Name	Contact Modality	Presentation Modality	Run State	Pending Offers	Offers	Responses	Start Date	End Date	Action
1	Customer Service Trial	Any	Voice	Draft	0	0 / Unlimited	0 / Unlimited	2020-10-12 11:07 AM	2020-10-31 12:00 AM	  
2	Test Survey Run	Any	Voice	Draft	0	0 / Unlimited	0 / Unlimited	2020-10-12 11:19 AM	2020-10-29 12:00 AM	  

**Note:** Completed Surveys cannot be reactivated.

## Create a new Survey Run

To create a new survey run, complete the following steps:

1. Click 'Add'. The survey run form appears.

← SURVEY RUNS

ADD

Name

Associated Survey

Default Language

RUN STATE

Draft  Active  Suspend  Completed

ADD

2. Enter the name of the Survey Run. The recommended length for names is less than 25 characters.
3. Select the associated survey from the dropdown list.  
**Note:** Only active surveys can be selected.
4. Select the default language for the Survey Run.
5. The Run State will be set to Draft by default. This can be changed after the Survey Run has been created.
6. Configure the Scheduling Options

**Note:** Date and Time fields are not mandatory. If left empty, the Survey Run will run for an unlimited amount of time. All other fields are mandatory and must be configured.

SCHEDULING OPTIONS

Run Start Date

Run End Date

Daily Run Start Time

Daily Run End Time

Days of the week to present

Present survey on statutory holidays? ON

## 7. Configure the Participant Options

**Note:** The Presentation Probability (%) field is mandatory and must be configured.

PARTICIPANT OPTIONS

Contact Modality

Originator Address Filter (Regex String)

Voice

IM

Email

Destination Address Filter (Regex String)

Voice

IM

Email

Queue Filter

Automatically evaluate participant eligibility on connection? ON

Presentation Modality

Presentation Probability (%)

## 8. Configure the Result Options.

### RESULT OPTIONS

End survey run after (0 = Unlimited)  Responses

Offers

Anonymize results? OFF

Enable purging survey results? OFF

Count partial responses? OFF

Delete partial responses? ON

URI of logo to show in web survey

## 9. Configure the Message Options

### MESSAGE OPTIONS

Completion Message

English (Canada) Français (Canada) Español (México)

Display Text

For Voice:  Use Display Text  Use Custom Text  Use Audio File

## 10. Configure the Voice and/or Web Presentation Options.

VOICE PRESENTATION OPTIONS ▼

Initiate callback survey after	<input type="text" value="0"/>	Seconds ▼
Expire callback attempt after	<input type="text" value="30"/>	Minutes ▼
Maximum Number of Callback Attempts	<input type="text" value="3"/>	
Delay Between Callback Attempts	<input type="text" value="5"/>	Minutes ▼
Daily Callback Start Time	<input type="text" value="⌚"/>	
Daily Callback End Time	<input type="text" value="⌚"/>	
Outbound UC Group	<input type="text" value="Use Routing Rules"/>	▼

### WEB PRESENTATION OPTIONS

Overwrite survey base URI? OFF

Expire survey link after

---

#### IM Survey Options

Survey Offer

[English \(Canada\)](#) [Français \(Canada\)](#) [Español \(México\)](#)

Display Text

*For survey address, use <ctt-survey-uri /> tag  
ex. Click <A HREF=<ctt-survey-uri/>>here</A> to take a survey!*

---

#### Email Survey Options

Survey Offer

[English \(Canada\)](#) [Français \(Canada\)](#) [Español \(México\)](#)

Subject:

Message:

*For survey address, use <ctt-survey-uri /> tag  
ex. Visit the following page to take a survey: <ctt-survey-uri/>* 0 / 4000

Outbound Email Group

The table below provides information on the options found on this page:

Survey Run Options		
Parameter	Permissible Values	Description
Name	Free text	Enter Survey Run name.
Associated Survey	Surveys configured in the system	Select one survey from the dropdown.
Default Language	Languages configured in the system	Select one language from the dropdown.
Run State	Draft Active Suspend Completed	<p>Select one of the options.</p> <p><b>Draft</b> – A survey run in draft state will be presented to callers meeting the criteria. These responses will be visible in journal and in reports. However, once the survey goes to an active state, all of the responses accumulated in draft state will be cleared. This option is selected by default.</p> <p><b>Draft Suspended</b> – A survey in draft mode will only be able to go to Draft Suspended. From Draft Suspended, it may proceed to Draft or Active. If going to Active, old responses will be removed.</p> <p><b>Active</b> – Survey Run can start offering the survey to clients.</p> <p><b>Note:</b> A survey run in Active state can only go to Suspended.</p> <p><b>Suspend</b> – Pause the Active Survey Run from being offered to additional clients.</p> <p><b>Completed</b> – Stop presenting surveys to clients. This state is reached when any of the following happens:</p> <ul style="list-style-type: none"> <li>▪ End Date is reached.</li> <li>▪ Number of Offers is reached.</li> <li>▪ Number of Responses is reached.</li> </ul> <p><b>Note:</b> State can only be modified after the survey run has been created.</p>
<b>Scheduling Options</b>		
Run Start Date	Date	Use the calendar to select a start date.
Run End Date	Date	Use the calendar to select an end date.

Survey Run Options		
Parameter	Permissible Values	Description
Daily Run Start Time	Time	Select a start time.
Daily Run End Time	Time	Select an end time.
Days of the week to present	All Monday Tuesday Wednesday Thursday Friday Saturday Sunday	From the dropdown select the days of the week that this survey run can present the survey to qualified contacts.
Present survey on statutory holidays?	On/Off	Select to have this survey run active during statutory holidays. Holidays will be configured in iceAdministrator.
<b>Participant Options</b>		
Contact Modality	All Voice IM Email	Select the modalities that this survey run will target.
Originator Address Filter (Regex String)	Regex String	Filter for participants based on their originating address – e.g., caller's phone number or email. <b>Note:</b> This is the most commonly used filter when creating a draft survey run to test the survey. Using this field, ice restricts the survey presentation to only the tester's phone number. This could be 10 digit cell numbers, or an internal teams domain. When setting the survey to active, remember to update this field to ensure the survey is presented to the proper audience.
Destination Address Filter (Regex String)	Regex String	Filter for participants based on their destination address – e.g., dialed phone number or email.

Survey Run Options		
Parameter	Permissible Values	Description
Queue Filter	Queues configured in the system	Select from the queues in the dropdown list.
Automatically evaluate participant eligibility on connection?	On/Off	Select to automatically qualify the customer upon connection to the system. Otherwise, the system will only check for qualification when the Add/Update Survey workflow action is reached.
Presentation Modality	Default Voice Email	The modality that the survey will be offered to the user on. Options include Voice, Email, and Default. <b>Note:</b> Default option follows the contact modality. <ul style="list-style-type: none"> <li>▪ Calls will receive a voice survey.</li> <li>▪ IMs will receive a link to the web survey in the chat window.</li> <li>▪ Emails will receive a link to the web survey in an email.</li> </ul>
Presentation Probability (%)	0 – 100	The probability that a contact will qualify for this Survey Run, assuming that the contact meets all other qualification criteria. 0 = never qualify 100 = always qualify
Result Options		
End survey run after	0 to N	Enter the maximum number of responses and offers required for this survey run. Offer: <ul style="list-style-type: none"> <li>▪ For voice – An instance of a contact being presented with a participation question to take the survey associated with this Survey Run.</li> <li>▪ For IM and email – An instance of a contact being presented with a web link.</li> </ul> Response:

Survey Run Options		
Parameter	Permissible Values	Description
		<ul style="list-style-type: none"> <li>Is an instance of a full or partially completed survey by a contact.</li> </ul> <p><b>Note:</b></p> <ul style="list-style-type: none"> <li>0 = unlimited.</li> <li>When either value is reached, the Survey Run enters the Completed state.</li> </ul>
Anonymize results?	On/Off	<p>Select to anonymize results for this survey run.</p> <p><b>Note:</b> The contact identifying information will no longer be associated with the contact, and as a result, the survey results will not appear in journal.</p>
Enable purging survey results?	On/Off	<p>Select to purge survey results after a set number of days.</p>
Data purge interval (days)	1 to N	<p>Enter the number of days after which the survey data will be purged.</p> <p><b>Note:</b></p> <ul style="list-style-type: none"> <li>This field is only available if the Enable purging survey results toggle is selected On.</li> <li>For Survey Runs that will end due to a set end date or a set number of responses/offers, this field indicates the number of days after the Survey Run ends that the Survey Responses will be purged.</li> <li>For Survey Runs that will not end due to no end date set or number of responses/offers set to 0, this field indicates the number of days after the Survey Response is collected that it will be purged.</li> </ul>
Count partial responses?	On/Off	<p>Select to count partial responses towards the required number of Responses on this Survey Run.</p>
Delete partial responses?	On/Off	<p>Select to delete partial responses.</p>

Survey Run Options		
Parameter	Permissible Values	Description
		<b>Note:</b> This field is only available if the count partial responses toggle is selected Off.
URI of logo to show in web survey	String	Enter the URI of the logo to appear on the web survey.
<b>Message Options</b>		
Completion Message Display Text	Free Text	Enter the completion message to appear at the conclusion of a survey.
For Voice	Use Display Text Use Custom Text Use Audio File	Select one of the audio options for the Completion Message. Use Display Text and Use Custom Text will use TTS to record the audio for the message. If you select Use Audio File, refer to Chapter 4: Audio Files for instructions on how to add a new audio file to iceManager. <b>Note:</b> This field only applies to Voice presentation mode.
<b>Voice Presentation Options</b>		
Initiate callback survey after	1 to N	Enter the duration after the call ends to initiate the callback survey. Enter a value and select the format from the dropdown: <ul style="list-style-type: none"> <li>• Hours</li> <li>• Minutes</li> <li>• Seconds</li> </ul>
Maximum Number of Callback Attempts	0 to N	Enter the number of attempts the system should make for a callback survey.
Delay Between Callback Attempts	0 to N	Enter the duration between callback attempts. Enter a value and select the format from the dropdown: <ul style="list-style-type: none"> <li>• Hours</li> <li>• Minutes</li> <li>• Seconds</li> </ul>

Survey Run Options		
Parameter	Permissible Values	Description
Daily Callback Start Time	Time	Select a start time.
Daily Callback End Time	Time	Select an end time.
Outbound UC Group	UC Groups configured in the system.	Select a UC group from the dropdown to use for callback surveys.
Web Presentation Options		
Overwrite survey base URI?	On/Off	Select to overwrite the base URI for web surveys in this survey run. <b>Note:</b> If you choose to overwrite the base URI, you will need to manage the URI redirection.
Base URI	Free text	Enter the base URI to use for web surveys in this survey run. <b>Note:</b> This field is only available if the Overwrite survey base URI toggle is selected On.
Expire survey link after	1 to N	Enter the duration after which the survey link will expire. Enter a value and select the format from the dropdown: <ul style="list-style-type: none"> <li>• Hours</li> <li>• Minutes</li> <li>• Seconds</li> </ul>
IM Survey Options		
Display Text	Free Text	Enter the survey offer message to be displayed at the end of an IM contact. To present the survey link within this message, enter the following: <ctt-survey-uri/>  <b>Note:</b> This field accepts html syntax.

Survey Run Options		
Parameter	Permissible Values	Description
<b>Email Survey Options</b>		
<b>Subject</b>	Free Text	Enter the subject to display for email surveys.
<b>Message</b>	Free Text	Enter the survey offer message to be displayed at the end of an email contact. To present the survey link within this message, enter the following: <ctt-survey-uri/>
<b>Outbound Email Group</b>	Email Groups	Select from the dropdown an Email Group to use for email surveys.

11. Once you are finished, click Add. If you wish to cancel this form, click the back arrow next to Survey Run at the top of the form page.

If you click the back arrow, the following message appears.



Click 'Yes' to cancel the survey form. Click 'No' to continue modifying the survey form.



## Chapter 4: **Audio Files**

Audio recordings are heard during Voice surveys. All statements, questions, and completion messages will be configured using the Audio Files section.

This section will discuss how to create and add recordings to the iceSurvey tool. Once a recording is added to the iceSurvey application, the recording can be played for specified questions created within the Surveys section.

Audio recordings must be added to this section in order to use recorded scripts in Voice surveys. Alternatively, Text to Speech can be used to create audio scripts for questions that are created in the Survey section. Web surveys do not require voice recordings.

## Managing Audio Files

This section can only be viewed or modified by authorized users, as per the Configuration Group settings. For more information on how to manage Configuration Groups, refer to the *iceManager User Manual*.

All audio files added to the iceSurvey tool will be listed in this table. Audio Files can be viewed, added, reactivated, deleted, and modified from the options provided.

The screenshot shows a web interface titled 'AUDIO FILES'. At the top left is a blue 'ADD' button. Below it is a table with the following columns: ID, Name, Folder, File Name, Language, Description, and Action. The table contains one row with the following data: ID: 1, Name: Satisfaction Question Audio, Folder: (empty), File Name: Satisfaction Question.wav, Language: English (Canada), Description: - Range question, and Action: (edit, delete, download, play icons).

ID	Name	Folder	File Name	Language	Description	Action
1	Satisfaction Question Audio		Satisfaction Question.wav	English (Canada)	- Range question	

The table below explains each column:

Column	Description
ID	Identification number of the audio file. Allows you to differentiate between audio files with the same name.
Name	Name of the audio file.
Folder	The folder on the server where the audio file is stored.
File Name	The name of the audio file as saved on the server.
Language	The language specified for the audio script.
Description	The description of the audio file.
Action	Icons that you click to edit, delete, download, and play the audio file.

### Modifying an Audio File

Audio files are linked to questions within a survey. Once an audio file has been added to iceSurvey, all aspects can be modified using the pencil icon and modifying the fields below.

ID	Name	Folder	File Name	Language	Description	Action
1	Satisfaction Question Audio		Satisfaction Question.wav	English (Canada)	- Range question	

## Delete an Audio File

To delete the audio file, click the garbage can icon. When you click the garbage can icon, an “Are you sure you want to delete this audio file?” message appears.

**DELETE AUDIO FILE**

Are you sure you want to delete this audio file?

1 - Satisfaction Question Audio

**YES** **NO**

Click yes to proceed with the deletion. Click No to cancel the deletion.

**Important:** Once an audio file is deleted, it is no longer associated with a survey question.

## Download an Audio File

To download the audio file, click the download icon. When you click the download icon, the audio file begins to download automatically to the default location on your workstation.

## Play an Audio File

To play the audio file on the iceSurvey page, click the play icon. When you click the play icon, the audio begins allowing you to listen to the selected audio file. The icon will change to a stop icon. Use the stop icon to stop the audio that is playing.

**Note:** The stop icon does not pause the audio that is playing.

## Add a new Audio File

To add an audio file, complete the following steps:

1. Click Add.

The New Audio File form appears.

ID	Name	Folder	File Name	Language	Description	Action
1	Satisfaction Question Audio		Satisfaction Question.wav	English (Canada)	- Range question	

2. Enter the location (folder name) to save the audio file on the server.

**Note:** If the field is left blank, the system will use the default folder location.

3. Select the default language of the audio file. Based on the selection, the audio file will only be available for surveys of the selected language.

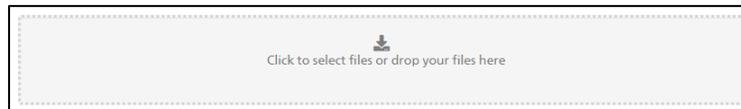


4. Add the audio file. There are two methods to add an audio file.

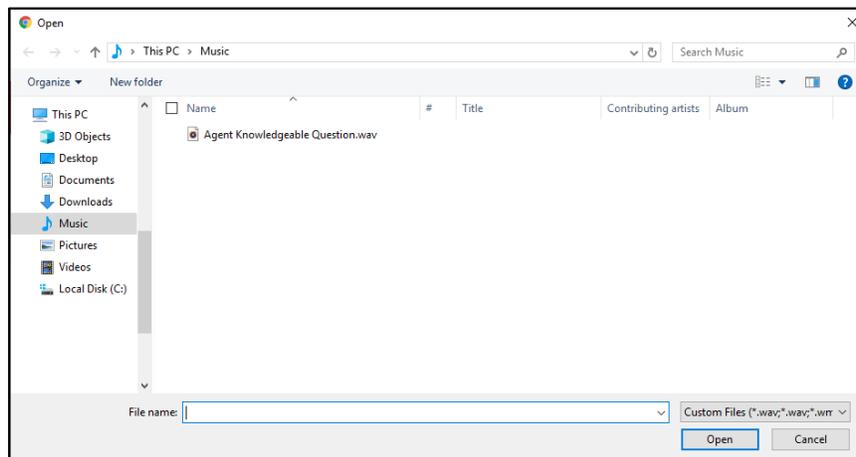
**Option 1:** Click to select files or drop your files here.

Use this option to add an existing audio file from your workstation.

- a. Drag the file from your file explorer window and drop it into this area, or click on this area to open a File Explorer window.



- b. From this window select the audio file from your workstation and click Open.

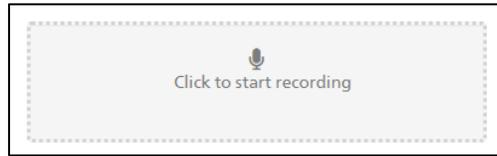


**Option 2:** Click to start recording.

Use this option to create a new recording.

**Note:** You will require a microphone to use this option.

- a. Click on this area to begin recording.



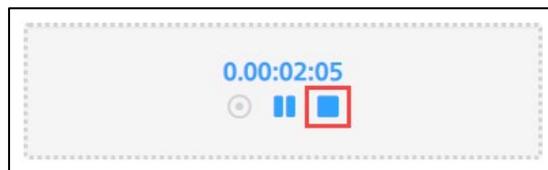
- b. To pause recording, select the pause (hold) button.



- c. To resume recording, select the resume button



- d. To finish recording, click the end button.



- e. In the window that appears, configure the recording name and click OK.

A dialog box with a white background and a black border. It contains the text "Please enter a file name:" above a text input field. The input field contains the text "RecordingName.wav". Below the input field is a blue button with the text "OK".

A progress bar will appear showing the progress of the file uploaded.

5. Complete the configuration of the audio file by confirming the Name, Folder, and Language fields. Add a description for the audio file.

EDIT ↑ ↓ 2 of 3 ^

File: *Agent Knowledgeable Question(1).wav* 📄 📄 📄

Name	Folder	Language	Description
Agent Knowledgeable Question		en-CA × ▾	-Range question

▶ 00:00  00:00 00:14 🔊

6. Click Save on the blue banner at the bottom of the page.

The table below provides information on the fields and buttons found on this page:

Parameter	Permissible Values	Description
Default Folder	Free Text	Enter a destination to save the audio file on the server.
Default Language	List is populated according to the available system languages.	Select a default language for the audio file.
<b>Edit</b>		
File	Free text	Displays the audio file name as named on the workstation.
Name	Free text	Enter the audio file name. This name should be unique to differentiate from other audio files added.
Folder	Free Text	Enter a folder name or directory within the Sharepath to save the audio file. For more information on the Sharepath, please refer to the <i>iceManager User Manual</i> .
Language	List is populated according to the available system languages.	Select a language for the audio file.
Description	Free Text	Enter a description for the added audio file.
Action Buttons	<ul style="list-style-type: none"> <li>Record</li> <li>Select</li> <li>Download</li> <li>Close</li> </ul>	<p>Use the following options to edit the selected audio file</p> <p>Record: record a new audio file.</p> <p>Select: select a new file from your workstation.</p> <p>Download: download the selected audio file.</p> <p>Close: close the Edit section.</p>



## Chapter 5: **Survey Results**

Survey results are visible in iceJournal and through iceReporting. This section will describe how to access the results in iceJournal. For more information on the available survey reports, please see the *iceReporting User Manual*.

## iceJournal Survey Responses

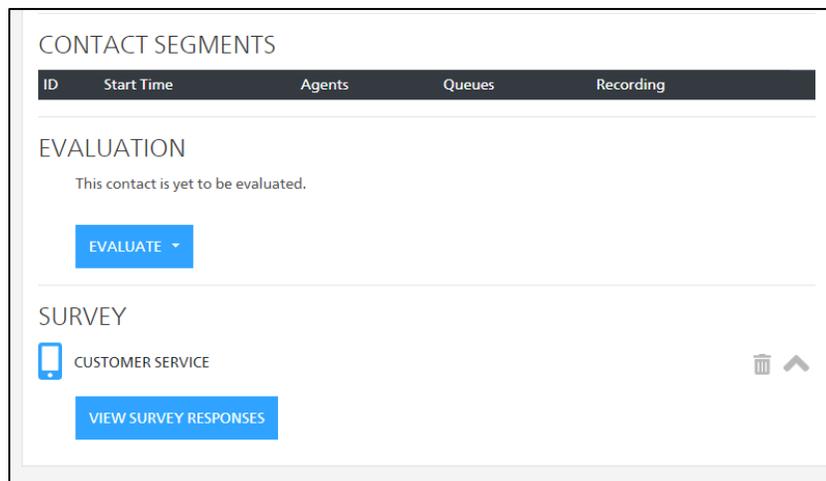
iceJournal provides the ability to search for interactions by queue, user, contact type, date range and other criteria. For more information on how to search for a particular interaction, please see the *iceManager User Manual*.

Completed survey results can be displayed in iceJournal.

After opening an interaction, the survey section displays the name of the survey that the customer participated in and provides the option to view and delete the Survey Response. Survey Responses can only be deleted by an administrator.

**Note:**

- Survey Responses will only be displayed if the contact participated in an active survey and the response is complete, or if the Survey Run is complete.
- All Survey Responses are also available in iceReporting.



To view the Survey Response, select the *View Survey Responses* button in the Survey section of the detail view.



The Survey Response page opens displaying the contact's details, all survey responses, scores, and score totals.

←
SURVEY RESPONSE

#### DETAILS

Contact ID: **14905**    Duration: **00:02:18**

Start Time: Dec. 3, 2020, 1:04:10 p.m.  
End Time: Dec. 3, 2020, 1:06:28 p.m.

#### EVALUATION

This contact is yet to be evaluated.

#### INTERACTION

Contact Modalities: Voice  
Sender: Jason (j@computer.com)  
Receiving Address: crow@computer.com  
Contact Group Name: Survey Inbound  
User Data: Joe (1000)  
Users: Voice Q (6002)  
Queues: Server:

---

#### CUSTOMER SERVICE

Completion Address: sip:j@computer.com  
Completion Modality: Voice  
State: Completed

Survey Introduction .....	n/a
Purpose of the call .....	n/a
Representative's attitude during the call .....	89%
Survey Conclusion .....	n/a



**67%**  
Totals

---

#### SURVEY INTRODUCTION

Hello. The following survey is regarding your last phone call with a Widget Corporation representative. It will take approximately 2 minutes to complete.

Category Total Score: **N/A**

---

#### PURPOSE OF THE CALL

Category Total Score: **N/A**



## Appendix A: Mandatory Prompts

For every deployment, the following prompts MUST be recorded into the iceSurvey Prompt Directory (you will have received information about this directory during configuration of your deployment):

File Name	Description	Script
S00010	Invalid opt in opt-out response.	That was an invalid entry.
S00012	Polite disconnect played if a user provides an invalid response too many times.	Thank you for calling. Goodbye.
S00020	Invalid survey question response.	That answer was not recognized. The question will be repeated. Please answer again.
S00021	Invalid entry for participation question.	That was an invalid entry.
S00030	Collect callback number.	Please enter a 10-digit phone number where you can be reached at after this call. You will be called within 15 minutes of completing this call.
S00031	Invalid callback number.	Sorry, I did not get that. Your callback phone number must be 10-digits. Please try again.
S00035	You have entered...	You have entered...
S00036	Confirm callback number	If this is correct, press 1; otherwise press 2 to re-enter.





# Index

## C

contact center, defined, 1  
contacts, defined, 1

## G

Global Settings  
User, 11

## I

ice<sup>3</sup>, defined, 1

## P

Pre-ambles, 15

## Q

**Question Design**, 15  
Rules of Thumb, 36  
Question Designer  
Responsibilities, 15

## S

Survey Design  
Rules of Thumb, 36



