



# Customer Satisfaction Index Service

Administration Guide

January 2014

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## INTRODUCTION

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The purpose of this document is to provide reference information to assist you with maintaining your Customer Satisfaction Index (CSI) account. This guide is divided into 2 sections:

1. “Setup” beginning on page 7 covers first time setup of CSI. It is more “step-oriented” and includes only the information that is needed to get started quickly.
2. “Administration” beginning on page 19 covers the CSI Administrative website in great detail. The order of this section follows the order of the CSI Navigation Menu.

As you are undoubtedly aware, HDI’s CSI product is a secure and reliable third-party survey tool designed specifically for the IT Service and Support industry. Survey results can be compared between support centers within client organizations and/or benchmarked against the industry, as a whole. We’re convinced these results can heighten employee awareness of industry standards, develop meaningful and measurable performance metrics, and ultimately increase customer loyalty and retention rates.

### **CSI Is Not the Ultimate Survey System... Just the Most Meaningful**

HDI intends to provide IT Service & Support organizations with a simple to sign up for and simple to use low cost service that will allow them to easily obtain technical customer satisfaction benchmark information. The key word is simple. CSI does a few basic things well and is not cluttered with fancy, seldom used options.

Instead, CSI seamlessly integrates with existing call tracking systems without the installation of any HDI software. This will ease installation and allow subscribers to be immediately operational. Once set up, CSI will be transparent to the support center. The support center merely continues to do its job using its existing software. The service’s value becomes evident over time as historical data builds up and trends become apparent.

These trends are provided through pre-configured reports distributed via email on a weekly or monthly basis. Subscribers can also download incident and response data from CSI to plug into their own systems, which allows for extended analysis possibilities.

## **Information Accessibility and 508(c) Compliance Statement**

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Thinkhdi-csi.com recognizes the importance of making information accessible to all users, regardless of their need for assistive technology. In order to do so, we have committed to providing an accessible interface for your customers. We are committed to keeping these end-user pages & emails compliant with section 508(c) of the Rehabilitation Act of 1973, and 36 CFR 1194.22 (Web-based Internet Information and Applications). In order to assist our Educational and Government users, a summary of the aforementioned compliance has been documented to match the Voluntary Product Accessibility Template (VPAT) format.

## CSI Security

---

CSI stores as little information as possible concerning a support center's clients. Most of the incident notification data is optional and typically won't be sent to the service. Access to the CSI service is via a secure website, using SSL encryption and is protected by login id and password.

If a client's incident descriptions typically contain confidential information, they can and should choose not to send the descriptions. Any descriptions that are sent to CSI are only stored if that incident generates a survey request. Further, the text of the description is only displayed on the survey request e-mail and/or the survey if the client specifically configures CSI to display it. If a description is ultimately stored, it is stored in an encrypted form.

Client e-mail addresses are never stored. They are only held in memory from the point the e-mail is machine read until the survey request is queued to be sent, typically milliseconds. If no request is sent, the e-mail address is removed from memory and never stored. If an e-mail address is used for a survey request, a unique signature is generated from the e-mail address and the actual email address discarded. This signature is a one-way hash that cannot be converted back to the original address. This signature is the only item stored, and allows CSI to ensure that people are not over-surveyed and that opt-outs are honored.

CSI Reports are distributed only to the specified e-mail addresses that the client provides. Clients also have the option of specifying a password that must be provided before the report can be downloaded. All CSI Reports are stored in encrypted form and are only decrypted during the download process. Download access is also via an SSL connection.

Hyperlinks that are placed in survey request e-mails, report download e-mails, etc. use embedded parameters to identify the particular survey, report etc. These parameters include encrypted data that have multiple levels of verification. Altering these parameters in an attempt to access someone else's survey or report will simply render the link useless.

## Setup

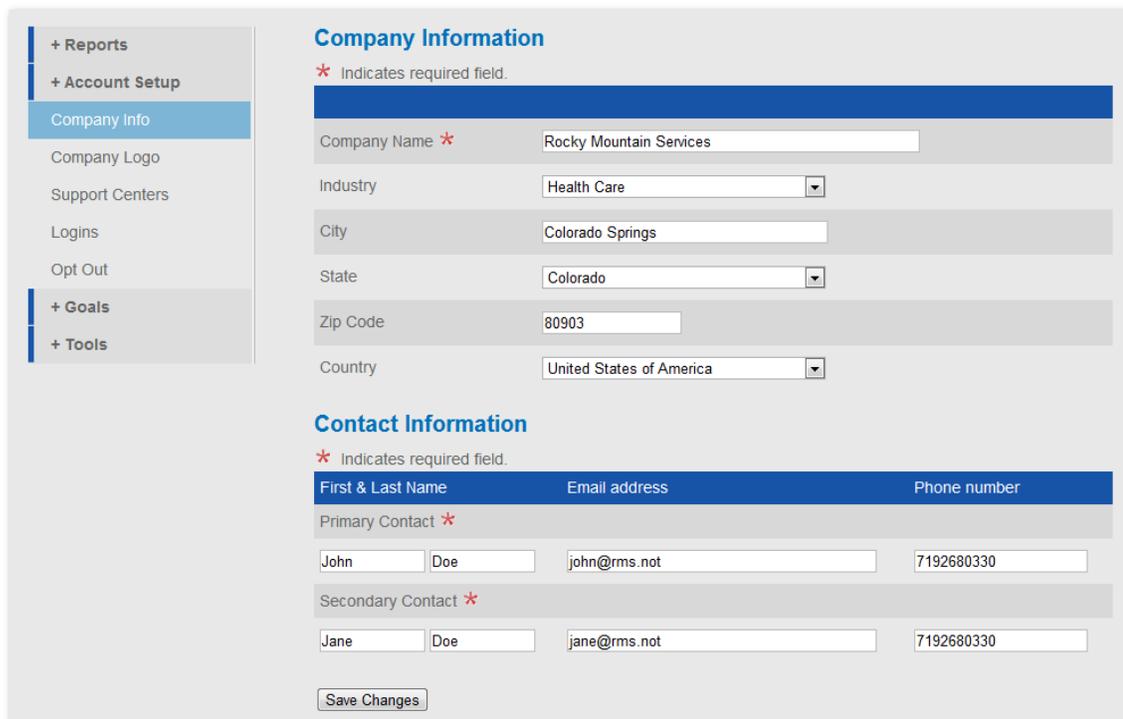
Setting up the CSI service involves the following steps:

1. Account set-up via CSI’s administrative website, which requires the input of basic company and support center information. (“Initial CSI Setup” on page 7)
2. Configure your support center’s existing ticketing software to enable it to send closed incident information to the CSI service. The instructions for this part vary depending on which software is used by your company. (“Ticketing Software Configuration” on page 9)
3. Testing. (“Testing” on page 14)

## Initial CSI Setup

There are 4 quick steps to configuring your CSI account:

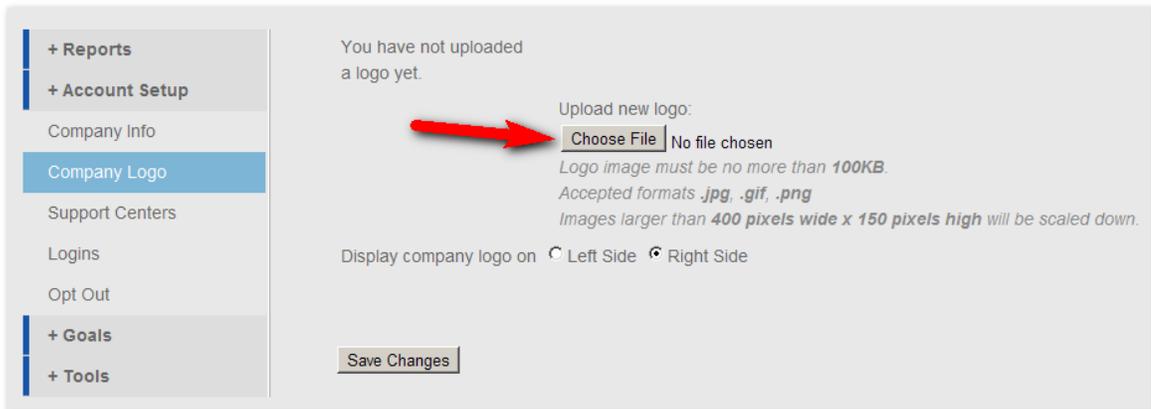
1. **Sign in:** From the CSI Landing page (<http://www.thinkhdi-csi.com>) click “Sign in” in the upper right. Use the username and password provided to you. For additional details, refer to “Login Screen” on page 19.
2. **Set Company Information:** Navigate to “Company Info” under the “Account Setup” menu item. Verify that the information appearing here is correct, filling out any missing details. Please choose the “Industry” field carefully as this determines who you are benchmarked against. This setting can be changed at any time. Click “Save Changes” when done. For additional details, refer to “Company Info” on page 21.



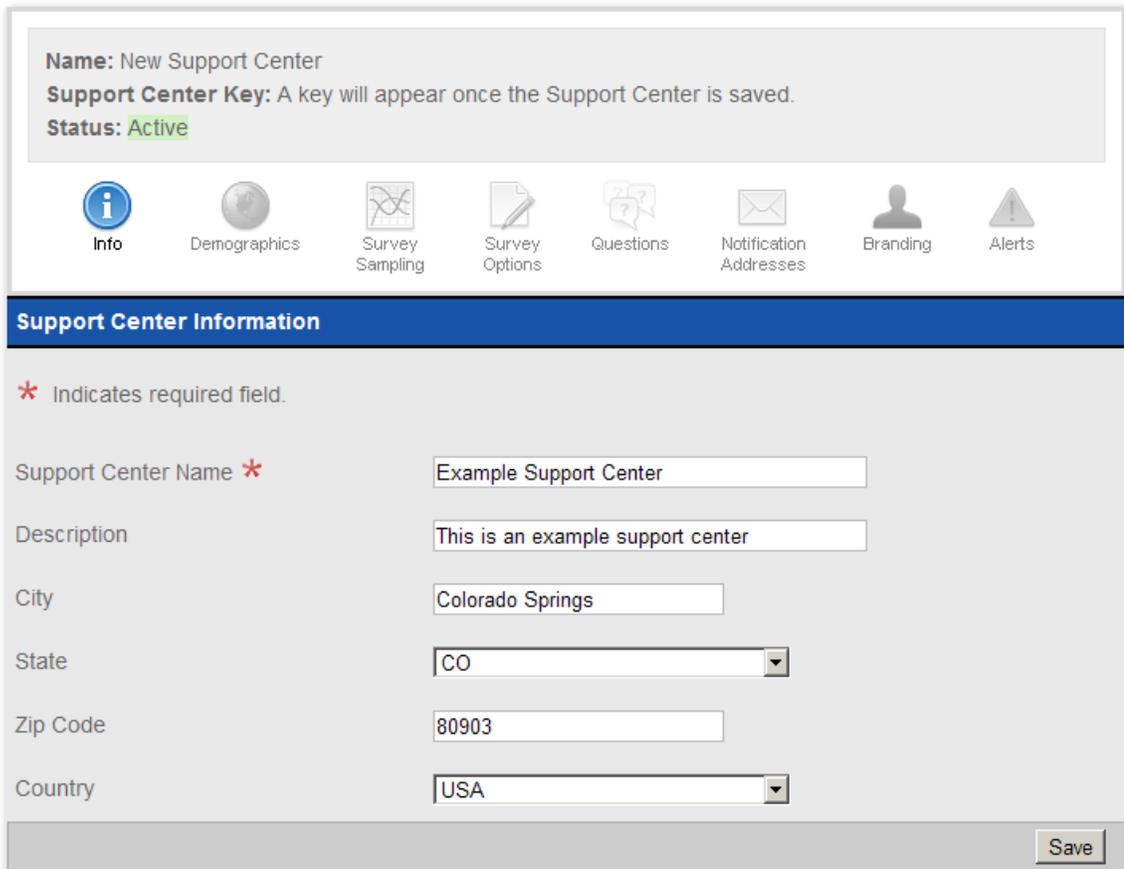
The screenshot shows the 'Company Information' and 'Contact Information' sections of the CSI administrative interface. The 'Company Information' section includes fields for Company Name (Rocky Mountain Services), Industry (Health Care), City (Colorado Springs), State (Colorado), Zip Code (80903), and Country (United States of America). The 'Contact Information' section includes fields for Primary Contact (John Doe, john@rms.not, 7192680330) and Secondary Contact (Jane Doe, jane@rms.not, 7192680330). A 'Save Changes' button is located at the bottom of the form.

3. **Upload a logo:** Navigate to “Company Logo” under “Account Setup”. Click “Choose File” and navigate to an image of your company’s logo. Please note that the image must be a jpg, gif, or png. Click “Save Changes”. The image you just uploaded will appear at the top of screen. For additional details, refer to “

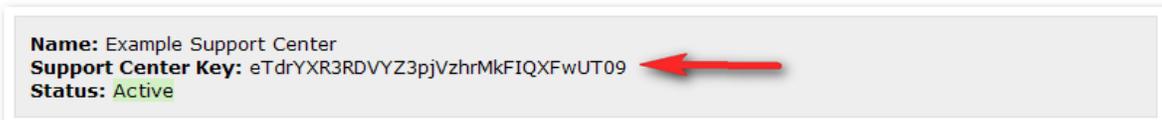
Company Logo” on page 22 of this guide.



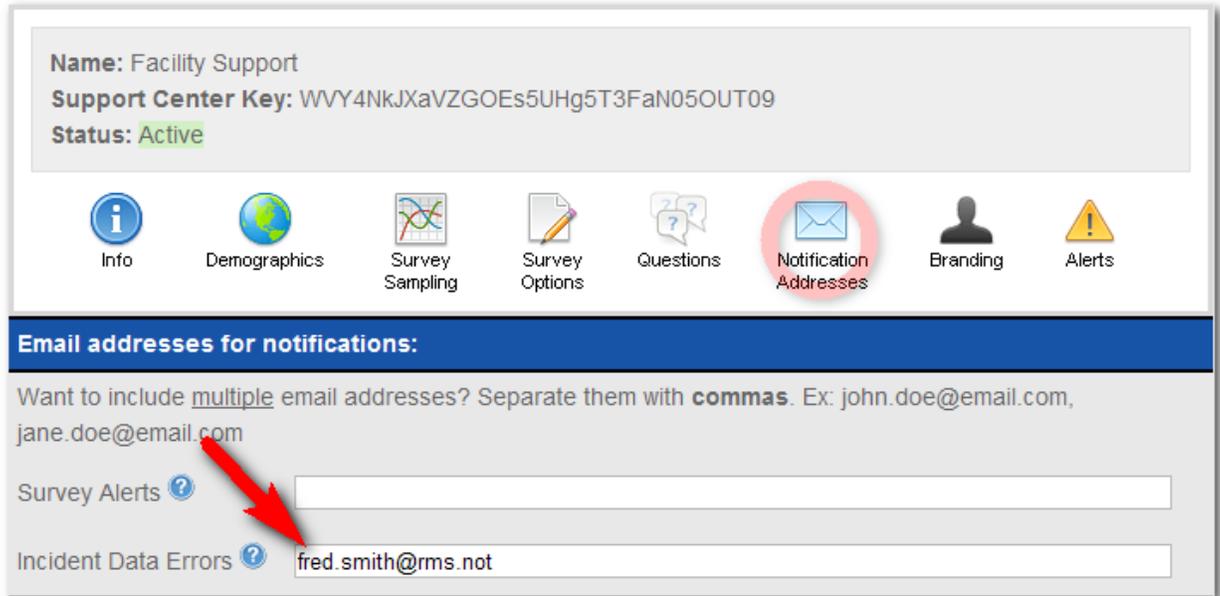
4. **Create a Support Center:** Navigate to “Support Centers” under “Account Setup”. Click “Create New” to create a new Support Center. Fill out the details on the “info” tab and click “Save”.



Once saved, the Support Center key will appear. You will need this key in the configuration of your ticketing software. For additional details, refer to “Adding a Support Center” on page 24.



You may also wish to set an email address to be notified whenever CSI receives data containing errors. This can be especially helpful during testing. To do this, select the “Notification Addresses” tab and enter in an email address in the “Incident Data Errors” field. Click “Save”.



**Name:** Facility Support  
**Support Center Key:** WVY4NkJXaVZGOEs5UHg5T3FaN05OUT09  
**Status:** Active

Info Demographics Survey Sampling Survey Options Questions **Notification Addresses** Branding Alerts

**Email addresses for notifications:**

Want to include multiple email addresses? Separate them with **commas**. Ex: john.doe@email.com, jane.doe@email.com

Survey Alerts

Incident Data Errors

## Ticketing Software Configuration

When at least one Support Center has been created in CSI, you may begin configuring your ticketing software. Basically, you want to configure the ticketing software to send CSI an email (referred to as the Incident Notification) whenever a ticket is closed. This email must use a template that contains specific pieces of information which CSI needs in order to send a survey.

### Incident Notification Template

Ideally, your customers will receive survey request emails as soon as their incident has been resolved. Modern incident management systems usually feature the ability to send emails with variable data upon events, such as an incident closure. To begin using CSI, your business’ ticketing system(s) will need to be configured to send *incident notification* emails to the CSI service.

The e-mail address to send incident notifications is: [data@thinkhdi-csi.com](mailto:data@thinkhdi-csi.com).

The body of the incident notification e-mail is a simple xml structure. The following is an example of a minimal incident notification. The data may be included in the body of the e-mail or it may be sent as a file attachment. CSI looks for a file attachment first and will use the first attachment that is found. The file name is ignored. If there are no attachments, CSI uses the body of the e-mail. CSI does not use the subject line. Here is a typical example:

```
<csi>
  <supportcenter key="VS9RqVRbcXpcckLzV2QsdXhMY1huZz09">
    <incident>
      <incidentid>32348</incidentid>
      <email>dave.smith@global.not</email>
      <dtclosed>2005-05-26 15:20:34</dtclosed>
      <firstname>Dave</firstname>
      <lastname>Smith</lastname>
      <desc>Password needs to be reset.</desc>
    </incident>
  </supportcenter>
</csi>
```

The data that is shown underlined comes from the particular incident and is plugged into the surrounding xml structure by your support center software. The underlining is just for the purpose of emphasis. Also note that the indentions are not necessary and are for readability purposes only. Your xml will look different than the examples since each support center software application tends to have its own proprietary format for referencing data in its incidents. For example some software uses place markers to denote references to data:

```
...
<incidentid>$CurrRec.CallRefNbr$</incidentid>
<email>$CurrRec.CallerEmail$</email>
...
```

Please address any configuration issues related to your support center software directly to your vendor.

### **Support Center Key**

The support center key referenced in the above example is unique to each support center. This key is obtained by navigating to “Support Centers” under the “Account Setup” menu item and selecting “Edit” next to your Support Center. The key can be found in the grey box at the top.



The key is case sensitive and must be copied precisely. This key identifies which support center the incident data belongs to. Incorrect keys will cause the data to be rejected.

### **Required and Optional Closed-Incident Elements**

The xml structure contains only a few required elements and several optional elements. The required elements must be present for CSI to properly sample the incident and send a survey request. The optional elements are stored if a survey request is sent and are made available to the support center as part of the data download feature. Any incident notification data errors that are detected will be reported back to the support center. Refer to “Errors” on page 18 for instructions on setting the email addresses to be notified of errors.

The following elements are required.

- **<incidentid>** - Up to 50 chars. The original incident identification used by the support center. This might be the call ticket number, reference number, etc. This value is presented in the survey request e-mail and the survey to help remind the survey recipient as to which call the survey pertains.
- **<email>** - Up to 300 chars. The e-mail address that will be used for the survey request e-mail.
- **<dtclosed>** - The date and time that the incident was closed. By default CSI accepts MM/DD/YYYY hh:mm:ss, but can be customized to accept most date formats.

The following elements are optional but are commonly included:

- **<firstname>** - The first name of the person that will receive the survey request.
- **<lastname>** - The last name of the person that will receive the survey request.
- **<agent1>** - Up to 100 chars. Primary support center agent associated with call ticket.
- **<desc>** - The incident description. This description can optionally be displayed in the survey request e-mail and/or the survey.
- **<langhint>** - Indicates what language the survey recipient would prefer. The list of valid values will grow as the request e-mail and the survey itself are translated to other languages. If specified, the survey request e-mail and the survey will be produced in the request language. The survey will provide the option of switching languages 'on the fly' using the language icons at the top of the survey page. Currently, the supported langhint values are:
  - zh-cn (Chinese – Simplified)
  - cs-cz (Czech)
  - da-dk (Danish)
  - en-us (English – US)
  - en-gb (English – UK)
  - fi-fi (Finnish)
  - fr-fr (French)
  - fr-ca (French / English)
  - de-de (German)
  - el-gr (Greek)
  - hu-hu (Hungarian)
  - is-is (Icelandic)
  - it-it (Italian)
  - ja-jp (Japanese)
  - ko-kr (Korean)
  - nb-no (Norwegian)
  - nl-nl (Dutch)
  - pl-pl (Polish)
  - pt-br (Portuguese - Brazil)
  - ro-ro (Romanian)
  - ru-ru (Russian)
  - sr-latn-rs (Serbian – Latin)
  - es-mx (Spanish - Mexico)
  - es-cl (Spanish – Chile)
  - es-es (Spanish – Spain)
  - sv-se (Swedish)
  - tr-tr (Turkish)

The following elements are optional and are not used by CSI. If provided and a survey request is sent, these data elements will be stored and made available to the company via the data download feature. These data elements can be utilized however the company wishes:

- **<agent2>** - Up to 100 chars. Secondary support center agent associated with call ticket.
- **<orgmaj>** - Up to 100 chars. Major 'organization code' associated with caller/call ticket.
- **<orgmin>** - Up to 100 chars. Minor 'organization code' associated with caller/call ticket.
- **<orgsub>** - Up to 100 chars. Sub 'organization code' associated with caller/call ticket.
- **<catmaj>** - Up to 100 chars. Major 'call type' category associated with call ticket.
- **<catmin>** - Up to 100 chars. Minor 'call type' category associated with call ticket.
- **<catsub>** - Up to 100 chars. Sub 'call type' category associated with call ticket.
- **<location>** - Up to 100 chars. Location associated with call ticket.

### ***More advanced incident notification examples.***

An example that includes all optional data elements:

```
<csi>
  <supportcenter key="VS9RqVRbcXpzZkLzV2QsdXhMY1huZz09">
    <incident>
      <incidentid>32348</incidentid>
      <email>dave.smith@global.not</email>
      <dtclosed>8/26/2010 15:20:34</dtclosed>
      <firstname>Dave</firstname>
      <lastname>Smith</lastname>
      <desc>Printer making crunching sound.</desc>
      <agent1>D Lister</agent1>
      <agent2>A Rimmer</agent2>
      <orgmaj>Corporate</orgmaj>
      <orgmin>Account Analysis</orgmin>
      <orgsub>Ops</orgsub>
      <catmaj>Computer Hardware</catmaj>
      <catmin>Printer</catmin>
      <catsub>Paper Jam</catsub>
      <location>Colorado Springs</location>
      <langhint>en-us</langhint>
    </incident>
  </supportcenter>
</csi>
```

An example of a minimal incident notification with multiple incidents:

```
<csi>
  <supportcenter key="VS9RqVRbcXpzZkLzV2QsdXhMY1huZz09">
    <incident>
      <incidentid>48</incidentid>
      <email>dave.smith@global.not</email>
      <dtclosed>8/26/2010 15:20:34</dtclosed>
      <firstname>Dave</firstname>
      <lastname>Smith</lastname>
    </incident>
    <incident>
      <incidentid>50</incidentid>
      <email>fred.jones@global.not</email>
      <dtclosed>08/26/2010 16:12:01</dtclosed>
      <firstname>Fred</firstname>
      <lastname>Jones</lastname>
    </incident>
  </supportcenter>
</csi>
```

An example of a minimal incident notification with multiple incidents and multiple support centers:

```
<csi>
  <supportcenter key="VS9RqVRbcXpzZkLzV2QsdXhMY1huZz09">
    <incident>
      <incidentid>32348</incidentid>
      <email>dave.smith@global.not</email>
      <dtclosed>2005-05-26 15:20:34</dtclosed>
      <firstname>Dave</firstname>
      <lastname>Smith</lastname>
      <desc>Password needs to be reset.</desc>
    </incident>
    <incident>
      <incidentid>32248</incidentid>
      <email>julie.roberts@global.not</email>
      <dtclosed>2005-05-24 15:00:34</dtclosed>
      <firstname>Julie</firstname>
      <lastname>Roberts</lastname>
      <desc>Network is down.</desc>
    </incident>
  </supportcenter>
  <supportcenter key="Tg9SsYUdeXw2ZlFsG3EdwFgLYdgwDd14">
    <incident>
      <incidentid>000038</incidentid>
      <email>fred.jones@rms.not</email>
      <dtclosed>2005-06-23 12:25:24</dtclosed>
      <firstname>Fred</firstname>
      <lastname>Jones</lastname>
      <desc>Lost access to voice-mail.</desc>
    </incident>
  </supportcenter>
</csi>
```

## Testing

### Entering Test Mode

To test that your ticketing software has been configured correctly, you can place one of your CSI Support Centers into Test Mode. This will cause all surveys to be redirected to a single specified email address which will allow you verify that the surveys appear correctly. To enter test mode, navigate to “Support Centers” under the “Account Setup” menu item. Next to the Support Center you wish to place in Test Mode, select “Test” under the “Status” drop-down.

Name	Description			Status
CSI Example Center	Provides support/info concerning continuing ed	<a href="#">Edit</a>	<a href="#">Remove</a>	Active
Facility Support	Provides support related to facilities	<a href="#">Edit</a>	<a href="#">Remove</a>	Active
IT Support Center	Provides support related to IT	<a href="#">Edit</a>	<a href="#">Remove</a>	Active



A form will ask you to enter the email address to which all surveys will be redirected. Once entered, click “Enter Test Mode”.

**Support Center: "IT Support Center"**

All surveys for "IT Support Center" will be redirected to the address specified below.

Redirect email address:

[Cancel](#)

The background behind the Support Center changes to yellow to indicate that it is in test mode. All surveys to this Support Center will now be redirected to the specified email address.

Name	Description			Status
CSI Example Center	Provides support/info concerning continuing ed	<a href="#">Edit</a>	<a href="#">Remove</a>	Active
Facility Support	Provides support related to facilities	<a href="#">Edit</a>	<a href="#">Remove</a>	Active
IT Support Center	Provides support related to IT	<a href="#">Edit</a>	<a href="#">Remove</a>	Test john.doe@rms.not ?

### Exiting Test Mode

Once testing is completed, exit test mode by selecting "Active" in the status drop down.

Name	Description		Status
CSI Example Center	Provides support/info concerning continuing ed	<a href="#">Edit</a> <a href="#">Remove</a>	Active
Facility Support	Provides support related to facilities	<a href="#">Edit</a> <a href="#">Remove</a>	Active
IT Support Center	Provides support related to IT	<a href="#">Edit</a> <a href="#">Remove</a>	Test <b>Active</b> Test

Select "Exit Test Mode" in the confirmation that appears.

**Support Center: "IT Support Center"**

Once you leave test mode, surveys will no longer be redirected to "john.doe@rms.not"

[Cancel](#)

Once test mode is exited, the test data will be automatically removed at 11:30 PM MST that night. You may begin sending in production data immediately without needing to wait for the test data to be removed.

## Survey Request e-mail

Below is a screen shot of a typical survey request e-mail. This example shows the optional company logo, the company name, incident id, closed date/time and optional short description.

From: CSI Service on behalf of Rocky Mountain Services [csisurveymailer@thinkhdi-csi.com] Sent: Thu 10/20/2011 4:32 PM  
To: Joel Beckham  
Cc:  
Subject: How well did CSI Example Center serve you?



***Please complete our customer satisfaction survey at your earliest convenience.  
This survey takes less than one minute to complete. We appreciate your time!***

Hello John,

CSI Example Center has asked HDI, an independent industry association, to randomly select closed incidents to better monitor customer satisfaction levels. Your response will help Rocky Mountain Services improve service quality.

Thank you for requesting a sample survey from Rocky Mountain Services. This is a custom paragraph that you can edit to meet your business needs!

**Incident #** INC000123 closed on 10/20/2011  
**Incident Desc:** This is an example survey.

[Take Survey Now](#)

Thank you for participating in this survey; Rocky Mountain Services values your opinion. Should you have any questions, please feel free to contact CSI Example Center at 719-555-2222 ext 1.

[Click here for more information about HDI.](#)[Click here to opt out of future surveys](#)

## Survey

When the recipient clicks “Take Survey Now”, he or she will see the following survey in their browser. Note that the introductory text is similar to the survey request e-mail. The main survey questions are group together and are required. If the respondent submits the survey without answering all the required questions, the survey will be presented again with the missing questions highlighted. The “Additional feedback” question is not required.





English (US) ▼

Hello John,

Rocky Mountain Services has asked [HDI](#), an independent industry association, to randomly select closed incidents to better monitor customer satisfaction levels.

Incident #: INC00234  
Incident closed: 7/19/2010  
Incident Description: This is an example survey.

How satisfied are you with:	 Very Dissatisfied					 Very Satisfied	N/A
The courtesy of the analyst?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
The timeliness of the service provided?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
The technical skills/knowledge of the analyst?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
The quality of the service provided?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
The overall service experience?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Additional feedback

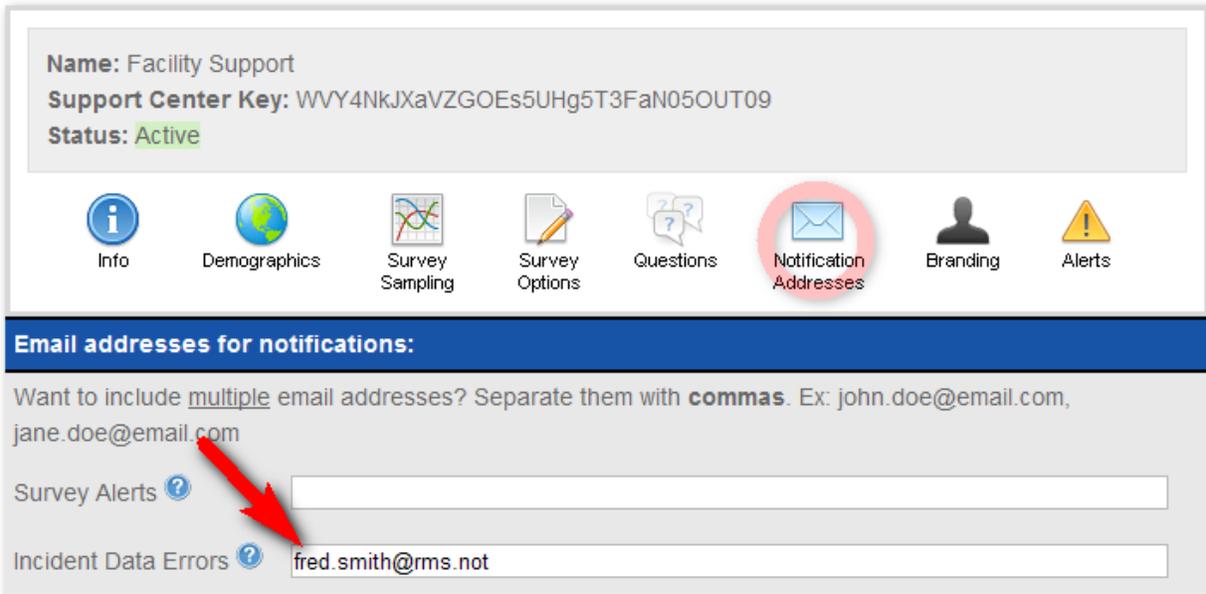
If you have further questions/issues, you may contact CSI Example Center directly at 719-555-2222 ext 1.

Please have the support center contact me.

(Select N/A if this survey does not pertain to your experience.)

## Errors

If CSI receives an incident notification which contains an error, CSI will send an error alert to the email address specified in “Incident Data Errors”. “Incident Data Errors” can be found on the “Notification Addresses” tab when editing a Support Center. The error alert email is titled “CSI had trouble loading an incident” and contains a brief description of the error. A copy of the data which caused the error is included as an attachment.



**Name:** Facility Support  
**Support Center Key:** WVY4NkJXaVZGOEs5UHg5T3FaN05OUT09  
**Status:** Active

Info   Demographics   Survey Sampling   Survey Options   Questions   **Notification Addresses**   Branding   Alerts

**Email addresses for notifications:**

Want to include multiple email addresses? Separate them with **commas**. Ex: john.doe@email.com, jane.doe@email.com

Survey Alerts ?

Incident Data Errors ?

## Administration

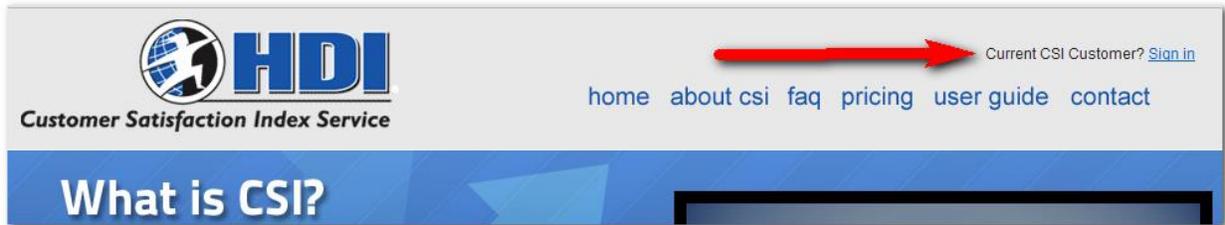
---

CSI's administration interface is accessed via your internet browser. CSI's address is <https://www.thinkhdi-csi.com>. Entering the short version of the address [www.thinkhdi-csi.com](http://www.thinkhdi-csi.com) will also work. This address will take you to CSI's login screen. The website uses SSL to ensure your information is encrypted while accessing the website.

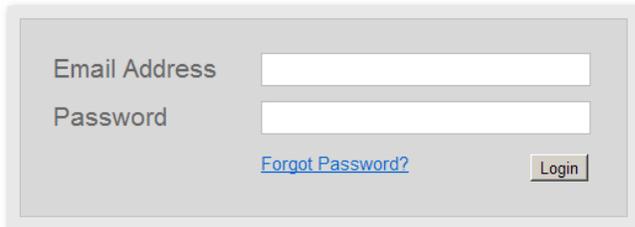
## Login Screen

---

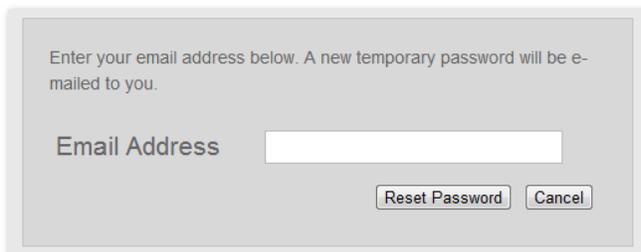
To access the login screen from the CSI landing page, click "Sign In" in the upper right.



Enter your username and password and click "Login"



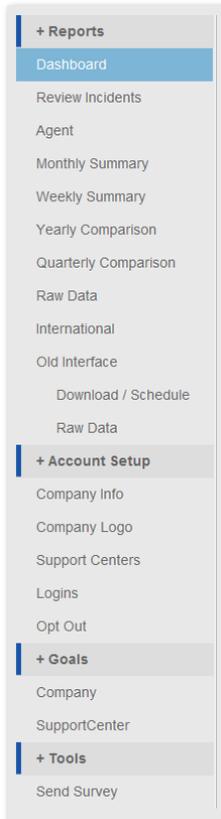
Should you forget your password you can click on "Forgot Password?"



Enter your username and click "Reset Password". A new temporary password will be e-mailed to you.

## Site Navigation

---



Once logged in, you will have full access to the administration tool. The major components of the tool are accessible via the Site Navigation menu. This menu is always located on the left side of the page. Clicking on a section causes it expand revealing a sub-menu. Selecting a sub-menu option will take you to that page. It is broken into the following sections:

- **Account setup** – provides options for configuring your contact information, support centers, logins, etc.
- **Goals** – provides options for configuring company and support center goals
- **Reports** – provides access to all of CSI’s reports

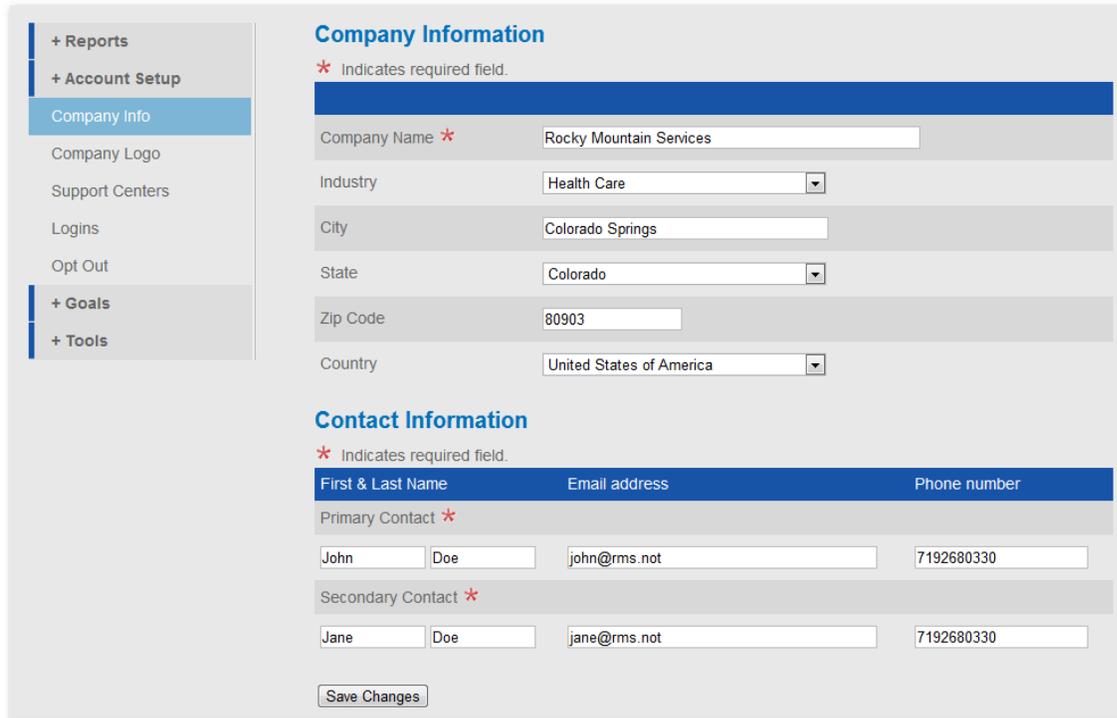
Each of these sections is outlined below.

The administration tool has a timeout feature that will automatically log you out if there is no navigation activity for 30 minutes.

## Account Setup

### Company Info

“Company Info” located under “Account Setup” accepts data pertaining to the overall company account. Note that you can change this information at any time.



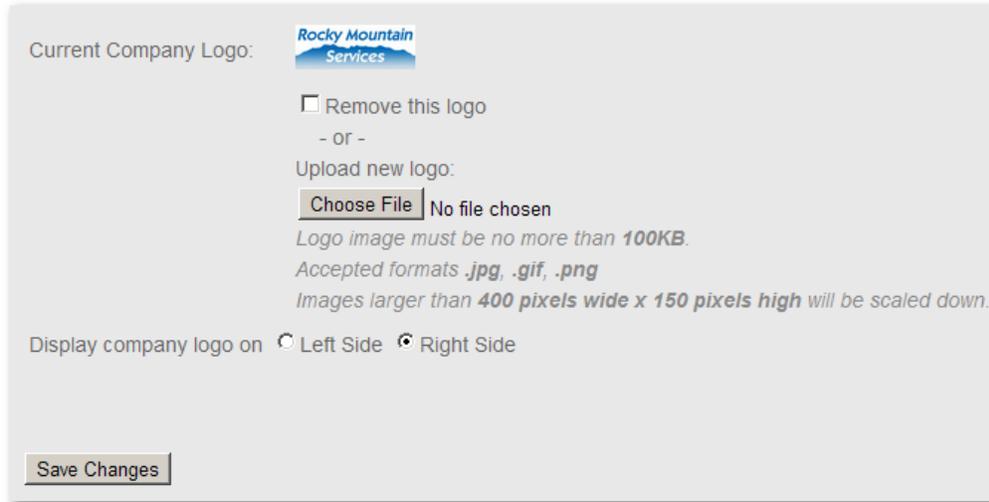
The screenshot shows a web interface for setting up a company account. On the left is a navigation menu with options: + Reports, + Account Setup, Company Info (selected), Company Logo, Support Centers, Logins, Opt Out, + Goals, and + Tools. The main content area is titled "Company Information" and includes a legend: "\* Indicates required field." Below this are several input fields: Company Name (Rocky Mountain Services), Industry (Health Care), City (Colorado Springs), State (Colorado), Zip Code (80903), and Country (United States of America). Below the company information is a "Contact Information" section, also with a legend. It contains two rows of contact details. The Primary Contact row shows: First & Last Name (John Doe), Email address (john@rms.not), and Phone number (7192680330). The Secondary Contact row shows: First & Last Name (Jane Doe), Email address (jane@rms.not), and Phone number (7192680330). A "Save Changes" button is located at the bottom of the form.

Company Name	This is the name of your company. This name will appear in report headers where appropriate.
Industry	Select the industry that most closely aligns with your company’s industry. If your industry is not represented in the list, please select “Other”. Industry comparisons are based on your company’s current industry selection.
City	The city where the company is located.
State	The state where the company is located.
Zip Code	The zip code where the company is located. This data may be used for geographical proximity-based reporting in the future.
Country	The country where the company is located.
Primary Contact	This is the name, email address and phone number for the primary contact for your CSI account. This information is used if HDI needs to contact you regarding your account as well as to notify you of upcoming maintenance or issues with CSI.
Secondary Contact	This is the email address and phone number for a secondary contact for your CSI account.

When finished making updates to the company logo, click the “Save Changes” button.

## Company Logo

“Company Logo” located under Account Setup allows you to upload a logo which will be displayed alongside the survey request email and the actual survey. Use the “Choose File” button to upload your logo file in a .jpg, .gif, or .png format (no more than 100KB and 400 pixels wide x 150 pixels high). You should see the logo at the top of this page after you click “Save Changes”.



Current Company Logo: 

Remove this logo  
- or -  
Upload new logo:  
 No file chosen  
*Logo image must be no more than 100KB.  
Accepted formats .jpg, .gif, .png  
Images larger than 400 pixels wide x 150 pixels high will be scaled down.*

Display company logo on  Left Side  Right Side

Remove Existing Logo	Check this box if you wish to remove a previously uploaded company logo.
Display company logo on	This allows you to choose which side of the survey request e-mail and survey an uploaded company logo will appear. It also determines which side it will appear in the administration tool.

When finished making updates to the company logo, click the “Save Changes” button.

## Support Centers

“Support Centers” located under “Account Setup” allows you to set up one or more support centers so that CSI can determine customer satisfaction scores. Each support center will be tracked separately. Each support center is automatically assigned a “support center key” which is used to identify its closed incidents to CSI.

Some companies may have a single support center that they wish to track as if it were multiple, separate support centers. This may be based on some criteria such as call type, etc. Separate support centers may be defined in CSI if your support center software is flexible enough to supply the appropriate “support center key” based on your criteria.

All currently defined support centers are displayed in a grid:

Name	Description			Status
CSI Example Center	Provides support/info concerning continuing ed	<a href="#">Edit</a>	<a href="#">Remove</a>	Active ▾
Facility Support	Provides support related to facilities	<a href="#">Edit</a>	<a href="#">Remove</a>	Active ▾
IT Support Center	Provides support related to IT	<a href="#">Edit</a>	<a href="#">Remove</a>	Active ▾

[Create New](#)

The following actions are available:

Create New	Creates a new support center.
Edit	Edits an existing support center.
Remove	Removes an existing support center. This option will delete all historical data related to this support center and any outstanding survey requests will become invalid. This option requires a confirmation. See “Archiving a Support Center” on page 25 for an alternative.
Change Status	<p>The Status drop-down allows you to change the current status of a support center. The following status options are available:</p> <ul style="list-style-type: none"> <li>• <b>Active</b> – This is the default. An active support center will actively send out surveys and collect results.</li> <li>• <b>Test</b> – All surveys will be redirected to a single email address for testing purposes. Upon selecting this option, you will be asked to enter the email address to be used for testing.</li> <li>• <b>Archived</b> – This lets you indicate that a support center is no longer active and won’t be sending any more closed incident notifications. Any outstanding survey can be completed and the support center will still appear in reports, etc.</li> </ul>

### Adding a Support Center

To add a support center, click “Create New” on the “Support Centers” page found under the “Account Setup” menu item. Fill out the fields on the “info” form. The rest of the sections are unavailable until you click “Save”. Once saved, a support center key will appear at the top.

**Name:** New Support Center  
**Support Center Key:** A key will appear once the Support Center is saved.  
**Status:** Active

  
Info

  
Demographics

  
Survey Sampling

  
Survey Options

  
Questions

  
Notification Addresses

  
Branding

  
Alerts

**Support Center Information**

\* Indicates required field.

Support Center Name \*

Description

City

State

Zip Code

Country

### Removing a Support Center

This option removes an existing support center. This option will delete all historical data related to this support center and any outstanding survey requests will become invalid. This option requires a confirmation. The confirmation message will indicate how many outstanding survey requests are based on the support center. If a survey request recipient attempts to take a survey that is based on a removed support center, they will receive an “Invalid Survey Request” message. See “Archiving a Support Center” on page 25 for an alternative. Removing a support center cannot be undone.

**Support Center: IT Support Center**

There are currently 7,513 outstanding survey requests associated with this Support Center.

Please note that all data associated with this support center will be permanently deleted.

Are you sure you want to remove **IT Support Center**

### Archiving a Support Center

This feature allows you to archive an existing support center. This lets you indicate that a support center is no longer active and won't be sending any more closed incident notifications. Any outstanding survey can be completed and the support center will still appear in reports, etc.

Name	Description		Status
CSI Example Center	Provides support/info concerning continuing ed	<a href="#">Edit</a> <a href="#">Remove</a>	Active
Facility Support	Provides support related to facilities	<a href="#">Edit</a> <a href="#">Remove</a>	Active
IT Support Center	Provides support related to IT	<a href="#">Edit</a> <a href="#">Remove</a>	<div style="border: 1px solid black; padding: 2px;"> Active  <b>Archived</b>  Test </div>



A confirmation is required to archive a support center:

**Support Center: IT Support Center**

There are currently 7,513 outstanding survey requests associated with this Support Center. Outstanding survey requests will still be serviced but no more service event notifications will be accepted for this Support Center once it is archived.

Are you sure you want to archive "IT Support Center"?

Once archived, the support center appears in red:

Name	Description		Status
CSI Example Center	Provides support/info concerning continuing ed	<a href="#">Edit</a> <a href="#">Remove</a>	Active
Facility Support	Provides support related to facilities	<a href="#">Edit</a> <a href="#">Remove</a>	Active
IT Support Center	Provides support related to IT	<a href="#">Edit</a> <a href="#">Remove</a>	Archived

### Reactivating a Support Center

An archived support center can be reactivated through the status drop-down by choosing “Active”:

Name	Description			Status
CSI Example Center	Provides support/info concerning continuing ed	<a href="#">Edit</a>	<a href="#">Remove</a>	Active
Facility Support	Provides support related to facilities	<a href="#">Edit</a>	<a href="#">Remove</a>	Active
IT Support Center	Provides support related to IT	<a href="#">Edit</a>	<a href="#">Remove</a>	Archived

A confirmation dialog is shown. Click “Yes, I’m Sure” and the support center will be reactivated.

### Entering Test Mode

To test that your ticketing software has been configured correctly, you will want to place one of your CSI Support Centers into Test Mode. This will cause all surveys to be redirected to a single specified email address which will allow you verify that the surveys appear correct.

To enter test mode, refer to “Entering Test Mode” on page 14.

### Exiting Test Mode

To exit test mode, refer to “Exiting Test Mode” on page 15.

## Editing a Support Center

Selecting “Edit” on the Support Centers screen takes you to the section which allows you to make changes to your support center. At the top you can see the support center name, the support center key, and the status of the selected support center.

**Name:** IT Support Center  
**Support Center Key:** MjAwZFFkY0pDWm0xenMrRlhUcXFhQT09  
**Status:** Active

The support center settings are broken down into a number of sections. You can navigate to each section by selecting its corresponding icon. Each section is detailed below.



Info



Demographics



Survey  
Sampling



Survey  
Options



Questions



Notification  
Addresses



Branding



Alerts

## Info

The info section allows you to modify the support center’s name, description and address. The support center’s name will appear in reports, etc.

### Support Center Information

\* Indicates required field.

Support Center Name *	<input type="text" value="IT Support Center"/>
Description	<input type="text" value="Provides support related to IT"/>
City	<input type="text" value="Colorado Springs"/>
State	<input type="text" value=""/>
Zip Code	<input type="text" value="80903"/>
Country	<input type="text" value="USA"/>

Save

## Demographics

The demographics section allows you to choose an industry for the support center as well as set other demographic details. Select the industry that most closely aligns with your support center's industry. If your industry is not represented in the list, please select "Other". Industry comparisons in reports are based on your support center's current industry selection.

Support Center Demographics	
Industry	<input type="text" value="Health Care"/>
Number of staff	<input type="text" value="- Select -"/>
Where are your customers	<input type="text" value="- Select -"/>
Type of support	<input type="text" value="- Select -"/>
Support Center software	<input type="text" value="- Select -"/>
Support Center maturity level	<input type="text" value="- Select -"/>
This Support Center is primarily an outsourcer	<input type="text" value="- Select -"/>
Approximately how many customers does this Support Center support:	<input type="text"/>
<input type="button" value="Save"/>	

## Survey Sampling

Survey Sampling	
Send no more than <input type="text" value="20"/>	surveys per <input type="text" value="1"/> days per end user (customer).
Requested sampling percentage:	50% <input type="button" value="Change"/>

Send no more than X surveys per X days per end user	Prevents individuals from being over-surveyed. An example would be 1 survey per 30 days. CSI will look back over the previous 30 days to determine if that person has already reached his/her limit.
Requested sampling %	Indicates the percentage of incidents you wish to be selected for the survey. Click "change" to bring up a calculator which helps you set this value.

For example, given the following settings:

- Send no more than 1 surveys per 30 days per end user.
- Requested Sampling %: 50%
- Users are allowed to opt-out. See "Survey Options" on page 30 for configuring opt-outs.

CSI chooses incidents to be surveyed as follows:

1. For this example CSI receives 100 incidents from you.
2. CSI chooses 50% (Requested Sampling %) to receive surveys, so that's 50 incidents.
3. CSI removes incidents for users who have been surveyed recently (Send no more than 1 surveys per 30 days). For this example, let's say that removes 7 incidents, leaving 43.
4. CSI removes incidents for users who have opted out. For this example, let's say that's 5 incidents leaving 38.
5. CSI sends surveys to the remaining 38 incidents.

## Survey Options

The “Survey Options” section allows you to configure a number of options on your surveys.

**Survey Options**

Display description in survey.

Allow survey recipient to request that the Support Center contact them.

Allow a survey recipient to resubmit their survey within  minutes of original submission.  
*This allows the original survey recipient to revisit their survey link and resubmit the survey with corrected answers. Cookies must be enabled on the survey recipient's browser in order for this feature to work. This ensures that no one else can make corrections to the survey.*

**Survey Request Email Options**

Display intro paragraph in survey request email.

Display first paragraph survey request email.

Display last paragraph in survey request email.

Display description in survey request email.

Custom paragraph. Maximum of 4000 characters, HTML not allowed. Can be customized for each language.  
Edit for:

Thank you for requesting a sample survey from Rocky Mountain Services. This is a custom paragraph that you can edit to meet your business needs!

Display opt-out link in survey request email.

**Customize Incident Labels**

Use default label ("Incident")

Use a single custom label (Configuration table below)

Use a label based on the beginning characters of the Incident ID

Survey Options	
Display incident description in survey	Checking this box will add the incident description to the survey page. Support centers that support confidential applications or sensitive information may wish to leave this box unchecked.
Allow survey recipient to request that the Support Center contact them	Checking this box adds an option to the bottom of the survey that allows your customers to indicate they want to be contacted by your support center. When your customer checks this box, you receive an email alert to “Survey Alerts” address found in the “Notification Addresses” section.
Allow a survey recipient to resubmit their survey within ___ minutes of original submission.	This feature allows the original survey recipient to revisit their survey link within the allotted period and resubmit the survey with corrected answers. Please note that the survey recipient’s browser must have cookies enabled in order for this feature to work. This ensures that no one else can make corrections to the survey. To be notified of a survey being resubmitted, see “Survey Alerts” on

	Page 41.
<b>Survey Request Email Options</b>	
Display intro paragraph in survey request email	Shows / Hides the paragraph beginning with, <b>“Please complete our customer satisfaction survey at your earliest convenience.”</b>
Display first paragraph in survey request email	Shows / Hides the paragraph beginning with, <b>“{Support Center Name} has asked HDI, an independent industry association...”</b>
Display last paragraph in survey request email	Shows / Hides the ending paragraph beginning with, <b>“Thank you for participating in this survey;”</b>
Display description in email	Checking this box will add the incident description to the body of the survey request email that contains a link to the survey. Support centers that support confidential applications or sensitive information may wish to leave this box unchecked.
Display opt-out link	Checking this box will include a link in the Survey Request Email that allows the user to opt their email address out from any future surveys. Company administrator (Primary contact) will be notified as users opt-out.
Custom Paragraph	This allows you to enter up to 4000 characters of copy to the Survey Request Email which appears under the opening paragraph. A translation can be provided for each available language by selecting the desired language and then entering the text. HTML is not allowed. This offers you an opportunity to communicate with your users anything specific to your support environment you feel is pertinent.

***Please complete our customer satisfaction survey at your earliest convenience. This survey takes less than one minute to complete. We appreciate your time!***

Hello Example First Name,

**Intro**

CSI Example Center has asked HDI, an independent industry association, to randomly select closed incidents to better monitor customer satisfaction levels. Your response will help Rocky Mountain Services improve service quality.

**First**

Thank you for requesting a sample survey from Rocky Mountain Services. This is a custom paragraph that you can edit to meet your business needs!

**Custom Paragraph**

**Incident #** SurveySample76405 closed on 12/18/2011 11:26 PM  
**Incident Desc:** Website visitor is interested in seeing a CSI Survey.  
**Analyst:** Example Agent Name

[Take Survey Now](#)

Thank you for participating in this survey; Rocky Mountain Services values your opinion. Should you have any questions, please feel free to contact CSI Example Center at 719-555-2222 ext 1.

**Last**

**Opt Out Link**

[Click here for more information about HDI.](#)
[Click here to opt out of future surveys](#)

Customize Incident Labels	<p>This section allows you to override the default Incident labels in the Survey and Survey Request Email. Please note that this does not affect the labeling in reports. The following options are available:</p> <ul style="list-style-type: none"> <li>• <b>Use default label (“Incident”).</b> This is the default setting and labels incidents with “Incident” (or the translated equivalent).</li> <li>• <b>Use single custom label.</b> This setting lets you specify a single alternative label to use in place of “Incident.” Translations can be provided for each</li> </ul>
---------------------------	---

available language by adding the language through the “Add Language” drop-down.

Label As	Add Language
English (US) (en-us)	
<span style="color: red;">✗ Delete</span>	
Case	

- **Use a label based on the beginning characters of the Incident ID.** This setting allows a different label to be used based on the Incident ID prefix. The condition specified in the “When” column is matched against the Incident ID to determine the label to use. For example, with the rules specified below, an Incident ID of “CS312524234” would be labeled as “Case” and an Incident ID of “SRV-0001234” would be labeled as “Service Request. Translations can be provided for each rule by adding the language through the “Add Language” drop-down.

When	Label As	Add Language
	English (US) (en-us)	
	<span style="color: red;">✗ Delete</span>	
CS	Case	<span style="color: red;">✗ Delete</span>
SRV	Service Request	<span style="color: red;">✗ Delete</span>
Default	Incident	<span style="color: green;">+</span> Add Rule

This is an example of the Survey Request Email with the label overridden as "Service Request":

Hello Joel,

CSI Example Center has asked HDI, an independent industry association, to randomly select closed incidents to better monitor customer satisfaction levels. Your response will help Rocky Mountain Services improve service quality.

Thank you for requesting a sample survey from Rocky Mountain Services. This is a custom paragraph that you can edit to meet your business needs!

**Service Request #** SRV-00001234 closed on 11/21/2011  
**Service Request Desc:** Example Survey.

[Take Survey Now](#)

And the Survey with the overridden label:

Hello Joel,

Rocky Mountain Services has asked [HDI](#), an independent industry association, to randomly select closed incidents to better monitor customer satisfaction levels.

**Service Request #:** SRV-00001234  
**Service Request** Closed: 11/21/2011  
**Service Request** Description: Example Survey.

How satisfied are you with:	 Very Dissatisfied				 Very Satisfied	N/A
The courtesy of the analyst?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
The technical skills/knowledge of the analyst?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
The timeliness of the service provided?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
The quality of the service provided?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
The overall service experience?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

## Questions

The “Questions” section allows you add custom questions to your surveys. There are 2 areas on this page:

**You Custom Question Bank.** This contains the questions you have created and is shared by all of your Support Centers.

### Your Custom Question Bank

You haven't added any custom questions yet. Click "Create New Question" below to get started.

[Create New Question](#)

**Shared Question Bank.** These are questions that are shared by all CSI users. In the future, these questions may be benchmarked.

### Shared Question Bank

Report	Q1	Q2	Question	Report Header	Required
<input checked="" type="checkbox"/>	<input type="radio"/>	<input checked="" type="radio"/>	How likely is it that you would recommend us to a friend or colleague?	NPS	<input checked="" type="checkbox"/>
<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	No Question		

To add a new question to your question bank, click “Create New Question”.

### Your Custom Question Bank

You haven't added any custom questions yet. Click "Create New Question" below to get started.

[Create New Question](#)



On the create question page, enter the text of your question. Also enter a short name which will be used on the reports. Since space is limited on the reports, the report header name will be used in place of printing the entire question.

**Create New Question**

Question Text:

Was the issue resolved to your satisfaction?

Label for Reporting:

Resolved?

Next, choose the type of answer. There are 3: Scale, Freeform, and True / False.

Answer Type:

Scale

Freeform

True / False

Beneath the Answer Type selection, relevant form fields will appear depending on the type of answer you choose. For this example question, we chose "True / False":

**Answer Settings**

Answer is Required

**Alert Conditions:**

No Alerts

If unanswered?

For the following answers...

**Answer Details:**

Alert? Label: Yes

Alert? Label: No

Save Changes Cancel

Along with these options, there are settings which control how the question is displayed. After choosing the display control, click “Display” to see a preview of how the question will appear.

**Display**

Display as Radio Buttons

Click to see what the question will look like: Display

---

Was the issue resolved to your satisfaction?

Yes

No

Once done, click the “Create Question” button. The new question appears in “Your Custom Question Bank” for all of your Support Centers.

**Your Custom Question Bank**

Check this box to include the question on your reports.

Q1 and Q2 represent the two custom question slots available on the survey. Mark the radio button next to the question you wish to use in that slot. Mark "No Question" if you do not want to use the slot.

Report	Q1	Q2	Question	Report Header	Required	Edit	Delete
<input type="checkbox"/>	<input type="radio"/>	<input type="radio"/>	Was the issue resolved to your satisfaction?	Resolved?	<input checked="" type="checkbox"/>	<span>Edit</span>	<span>Delete</span>
	<input type="radio"/>	<input type="radio"/>	No Question				

To use this question on the survey, select either the Q1 or Q2 radio button next to this question depending on if you want this to be the 1<sup>st</sup> or the 2<sup>nd</sup> custom question on your survey. There is no limit to the number of questions you can have in your question bank, but you can only select up to 2 at any time per support center to use on your surveys.

Report	Q1	Q2	Question	Report Header	Required	Edit	Delete
<input type="checkbox"/>	<input checked="" type="radio"/>	<input type="radio"/>	Was the issue resolved to your satisfaction?	Resolved?	<input checked="" type="checkbox"/>	<span>Edit</span>	<span>Delete</span>
	<input type="radio"/>	<input type="radio"/>	No Question				

To include this question in your reports, check the “Report” checkbox.

Report	Q1	Q2	Question	Report Header	Required	Edit	Delete
<input checked="" type="checkbox"/>	<input type="radio"/>	<input type="radio"/>	Was the issue resolved to your satisfaction?	Resolved?	<input checked="" type="checkbox"/>	<span>Edit</span>	<span>Delete</span>
	<input type="radio"/>	<input type="radio"/>	No Question				

*Note: The question in your custom question bank are shared by all of your Support Centers, but the Q1, Q2 and Report settings are specific to each individual support center. This allows you to select different questions to use for each of your Support Centers if you wish to do so.*

An example of a survey with the new custom question:

Hello John,

Rocky Mountain Services has asked [HDI](#), an independent industry association, to randomly select closed incidents to better monitor customer satisfaction levels.

Incident #: 2343  
Incident closed: 3/7/2011  
Incident Description: Example Survey

How satisfied are you with:	 Very Dissatisfied					 Very Satisfied	N/A
The courtesy of the analyst?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
The technical skills/knowledge of the analyst?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
The timeliness of the service provided?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
The quality of the service provided?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
The overall service experience?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Was the issue resolved to your satisfaction?

Yes

No

### Reporting on Custom Questions

Currently, custom questions are reported in the “Raw Data” Report. The question appears to the right of the standard questions and uses the Report Header you chose earlier:

Description	Completed	Alert	Q1	Q2	Q3	Q4	Q5	Resolved?
Example Survey	3/7/2011 3:48:27 PM	False	5	5	5	5	5	TRUE

## Notification Addresses

### Email addresses for notifications:

Want to include multiple email addresses? Separate them with **commas**. Ex: john.doe@email.com, jane.doe@email.com

Survey Alerts 

Incident Data Errors 

Survey Alerts	This address receives notices when survey alerts are triggered. It also receives a notice when the “Please have the support center contact me” on the survey is checked. To configure alert conditions, see “Survey Alerts” on page 41.
Incident Data Errors	If CSI receives an incident notification email from a support center that contains errors, CSI will send an error notification to this address.

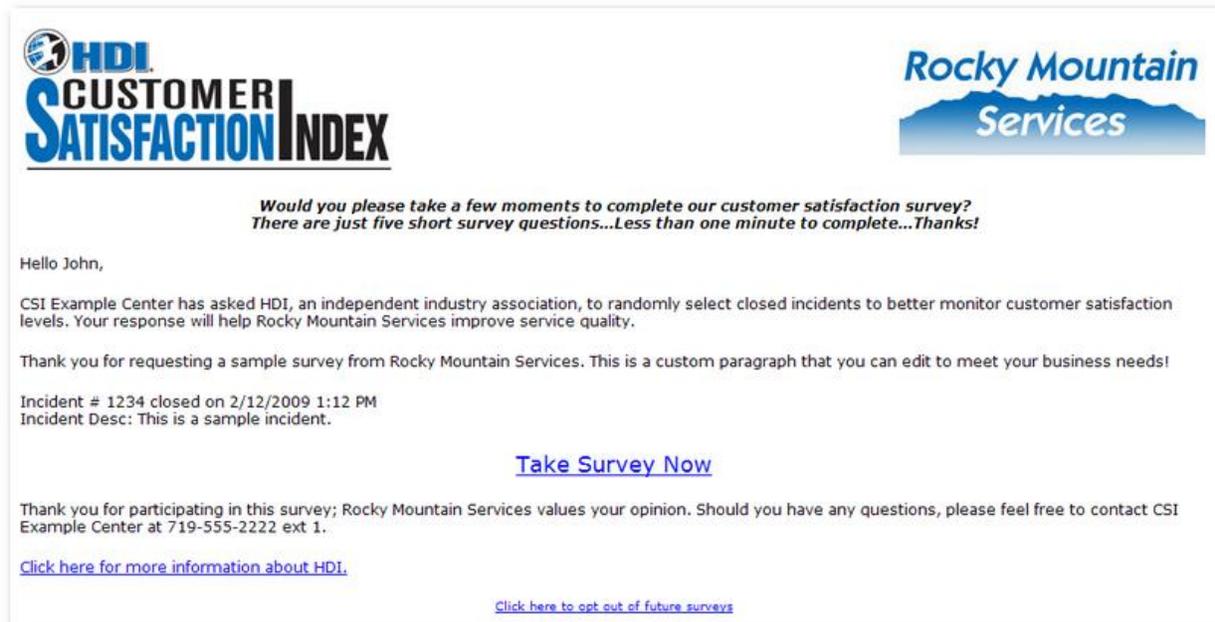
Multiple email addresses may be entered by separating them with commas or semicolons.

## Branding

The information in the branding section is displayed on the Survey and Survey Request Email. These values default to your Company Info settings, but can be overridden here. You may also provide contact information for your Support Center, as well as configure how your logo and the HDI logo are displayed.

Branding	
<b>Information</b>	
Company's Name	<input type="text" value="Rocky Mountain Services"/>
Support Center's Name	<input type="text" value="IT Services"/>
Support Center's URL	<input type="text"/>
Support Center's Phone #	<input type="text" value="719-555-1423"/>
<b>Logos</b>	
Your Logo	<input checked="" type="checkbox"/> Show your logo on the Survey <input checked="" type="checkbox"/> Show your logo on the Survey Request Email  <input checked="" type="radio"/> Use Company Logo. <input type="radio"/> Use a different logo for this Support Center <a href="#">(View Full Size)</a>
HDI's Logo	<input checked="" type="checkbox"/> Show HDI's logo on the Survey <input checked="" type="checkbox"/> Show HDI's logo on the Survey Request Email HDI logo size in Survey and Survey Request Email <input checked="" type="radio"/> Normal (300px x 115px) <input type="radio"/> Small (237px x 75px)  <a href="#">(View Full Size)</a>
<b>Other</b>	
	<input checked="" type="checkbox"/> Show "Click here for more information about HDI" in Survey Request Email.
<input type="button" value="Save"/>	

Using the above settings results in a survey email that looks like this:



The image shows a survey email template. At the top left is the HDI Customer Satisfaction Index logo. At the top right is the Rocky Mountain Services logo. The main body of the email contains a request to complete a survey, a personalized greeting to 'John', information about the survey's purpose, a thank you message, incident details, a 'Take Survey Now' link, and two additional links for more information and opt-out options.

**HDI**  
**CUSTOMER SATISFACTION INDEX**

**Rocky Mountain Services**

*Would you please take a few moments to complete our customer satisfaction survey?  
There are just five short survey questions...Less than one minute to complete...Thanks!*

Hello John,

CSI Example Center has asked HDI, an independent industry association, to randomly select closed incidents to better monitor customer satisfaction levels. Your response will help Rocky Mountain Services improve service quality.

Thank you for requesting a sample survey from Rocky Mountain Services. This is a custom paragraph that you can edit to meet your business needs!

Incident # 1234 closed on 2/12/2009 1:12 PM  
Incident Desc: This is a sample incident.

[Take Survey Now](#)

Thank you for participating in this survey; Rocky Mountain Services values your opinion. Should you have any questions, please feel free to contact CSI Example Center at 719-555-2222 ext 1.

[Click here for more information about HDI.](#)

[Click here to opt out of future surveys](#)

## Survey Alerts

---

This feature allows you to define survey response alerts for the selected support center. If a submitted survey includes a response that matches one of the survey response alerts, an e-mail is sent to the “Survey Alerts” e-mail address specified in the “

Notification Addresses” section. An alert can be used to be notified immediately of very poor or even very favorable responses. The alert e-mail identifies the incident ID, the date/time closed and provides a link to the submitted survey. The survey will highlight the alerted responses.

### Alert Configuration - Core Questions

For each survey question, select the responses that you feel deserve immediate attention.

  
Info

  
Demographics

  
Survey Sampling

  
Survey Options

  
Questions

  
Notification Addresses

  
Branding

  
Alerts

#### Alerts

Send an alert when any of the following conditions are met when a survey is completed:

Question	Answers					
	1	2	3	4	5	NA
Courtesy	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Timeliness	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Knowledge	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Quality	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Overall	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	

Additional Feedback filled out:

Send alert if survey is amended (*Survey amending is currently **Enabled***):

See the "Survey Options" tab to enable / disable the ability for your users to amending their surveys.

## Alert Configuration – Custom Questions

Figure 1: The custom questions you create are also able to trigger alerts.

  
Info

  
Demographics

  
Survey Sampling

  
Survey Options

  
Questions

  
Notification Addresses

  
Branding

  
Alerts

### Your Custom Question Bank

Check this box to include the question on your reports.

Q1 and Q2 represent the two custom question slots available on the survey. Mark the radio button next to the question you wish to use in that slot. Mark "No Question" if you do not want to use the slot.

Report	Q1	Q2	Question	Report Header	Required	Edit	Delete
<input type="checkbox"/>	<input type="radio"/>	<input type="radio"/>	Would you refer us to a friend or colleague?	Referral	<input type="checkbox"/>	Edit	Delete
<input checked="" type="checkbox"/>	<input checked="" type="radio"/>	<input type="radio"/>	Was the issue resolved to your satisfaction?	Resolved	<input checked="" type="checkbox"/>	Edit	Delete
<input checked="" type="checkbox"/>	<input type="radio"/>	<input type="radio"/>	Overall, how did you expect us to perform before you first called?	Great Expectations?	<input type="checkbox"/>	Edit	Delete
<input type="checkbox"/>	<input type="radio"/>	<input checked="" type="radio"/>	What would you like for us to know?	Constructive Comments	<input type="checkbox"/>	Edit	Delete
	<input type="radio"/>	<input type="radio"/>	No Question				

[Create New Question](#)

Figure 2: The alerts for custom questions may be maintained while creating / editing these questions.

**-Answer Settings:**

Answer is Required

**-Alert Conditions:**

No Alerts  
 If unanswered?  
 For the following answers...

**-Answer Details:**

Number of options: 5

Alert?	Numeric Value	Label
<input checked="" type="checkbox"/>	<input type="text" value="1"/>	<input type="text" value="1"/>
<input checked="" type="checkbox"/>	<input type="text" value="2"/>	<input type="text" value="2"/>
<input checked="" type="checkbox"/>	<input type="text" value="3"/>	<input type="text" value="3"/>
<input checked="" type="checkbox"/>	<input type="text" value="4"/>	<input type="text" value="4"/>
<input type="checkbox"/>	<input type="text" value="5"/>	<input type="text" value="5"/>

## Logins

**Login Maintenance** allows you to add, edit, and delete users. It also allows you to change passwords. Passwords must be between 5 and 10 characters in length and require at least one numeric digit.

Username	First	Last Name	Login Permissions			Actions	
			Setup	Reports	Tools		
demo.user@rms.not	Demo	User	✓	✓	✓	<a href="#">Edit</a>	<a href="#">Delete</a>
joel.beckham@ubm.com	Joel	Beckham	✓	✓	✓	<a href="#">Edit</a>	<a href="#">Delete</a>
reportuser@rms.not	Report	User	✗	✓	✗	<a href="#">Edit</a>	<a href="#">Delete</a>
admin@rms.not	RMS	Administrator	✓	✓	✓	<a href="#">Edit</a>	<a href="#">Delete</a>

Click “Create New Login” to create a new login. Enter the appropriate information and click ‘Save Changes’.

Username (Email Address)	<input type="text" value="jeff.smith@rms.not"/>
First Name	<input type="text" value="Jeff"/>
Last Name	<input type="text" value="Smith"/>
Permissions	<input checked="" type="checkbox"/> Setup  <input checked="" type="checkbox"/> Reports  <input checked="" type="checkbox"/> Tools 
<input type="button" value="Save Changes"/> <input type="button" value="Cancel"/>	

Please note that upon creation, a temporary password will be generated and sent to the specified email address.

To modify an existing login or reset its password, click Edit.

## Opt-Out Maintenance

**Opt-Out Maintenance** allows single and multiple opt-outs. An e-mail address that is opted-out will not receive any survey requests. This feature also allows you to reinstate previous opt-outs. Add the email addresses separated by a semicolon or comma. Multiple addresses should be grouped according to whether you wish to opt-out or reinstate the addresses. If configured in the “Survey Options”, users may also opt out on their own via a link in the Survey Request Email.

Enter one or more e-mail addresses in the textbox. Multiple e-mail addresses may be separated by a space, semicolon or comma. Use the Reinstate button to reinstate previous opt-outs.

For the security of your customers, these email addresses are stored in an irreversibly encrypted format. Because of this, this list will appear blank each time you come to this page. You may want to maintain a list of opted-out addresses for your reference.

```
fred.smith@rms.not  
julie.jones@rms.not  
joe.cool@rms.not
```

Opt-Out

Reinstate

Check Status

You can check the status of an email address at any time by clicking on the “Check Status” button.

## Goals

---

### Support Center

This feature allows you to establish goals for survey response average scores. Goals can be set for each of the survey questions and cover the time period from the start date until the next goal is set. Goals are used in reports to compare actual survey response scores to goals.

Select the appropriate survey question and then select a starting date on the calendar. An established goal will remain in effect until a different goal is set. Then, the next goal takes over. The small graphic symbol appearing on the calendar indicates a date where a goal period began. Goals range from 1 to 5 and are decimal values (for ex: 3.75). 1 is the lowest possible score (Very Dissatisfied) and 5 is the highest (Very Satisfied). To set a goal, navigate to the start date that you want the goal to begin. Enter the goal in the text box and click 'Set Goal'. To remove a goal, select any date for which that goal is in effect and click 'Remove Goal'.

Name	Description	
Facility Support	Provides support related to facilities	<a href="#">Edit Goals</a>
IT Support Center	Provides support related to IT	<a href="#">Edit Goals</a>
CSI Example Center	Provides support/info concerning continuing ed	<a href="#">Edit Goals</a>

[<< Back to Support Center List](#)

### Goals for Support Center: Facility Support

Set goals for survey question:

Select start dates for question-specific goals:

April 2011

Sun	Mon	Tue	Wed	Thu	Fri	Sat
27	28	29	30	31	1	2
3	4	5	6	7	8	9
10	11	12	13	14	15	16
17	18	19	20	21	22	23
24	25	26	27	28	29	30
1	2	3	4	5	6	7

Today: 4/14/2011

Selected date: 4/14/2011 - Active Goal: 3.80  
 Goal established: 1/1/2006

*Goal range is 1=Very Dissatisfied to 5=Very Satisfied. Decimal values are allowed.*

Set goal to  effective 4/14/2011.

### Company Goals

Company goals are established just like support center goals described above. Company goals allow company-wide goals to be established for each survey question. Company goals are used for reporting purposes to compare actual company-wide survey response scores to goals.

## Reports

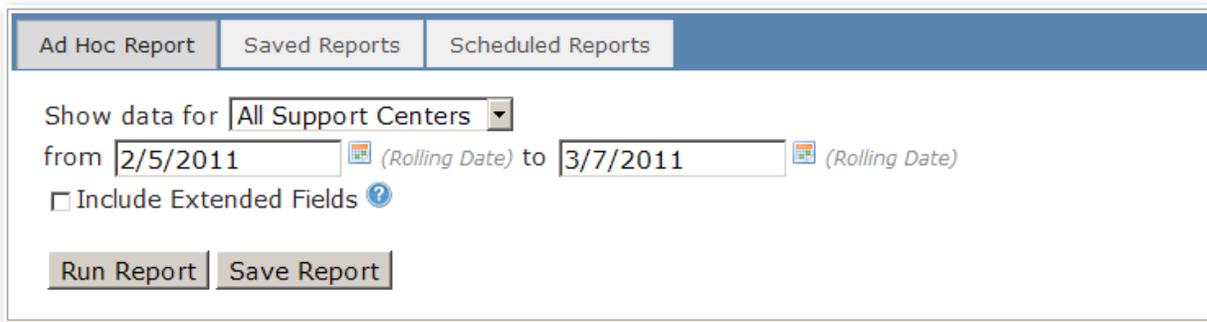
The CSI Portal provides a number of reports to show the data it has collected. These range from raw data to summarizations by week and month. These reports can be viewed, downloaded, and scheduled through the portal. The majority of the reports use a standard interface which is outlined in the next section.

### Standard Report Interface

Typically, the reporting pages use a standard reporting control. It contains 3 tabs: Ad Hoc Report, Saved Reports, and Scheduled Reports.

#### Ad Hoc Report

The Ad Hoc Report tab is for running reports right from the page. Enter the parameters you want for the report, and then click “Run Report”.



Ad Hoc Report | Saved Reports | Scheduled Reports

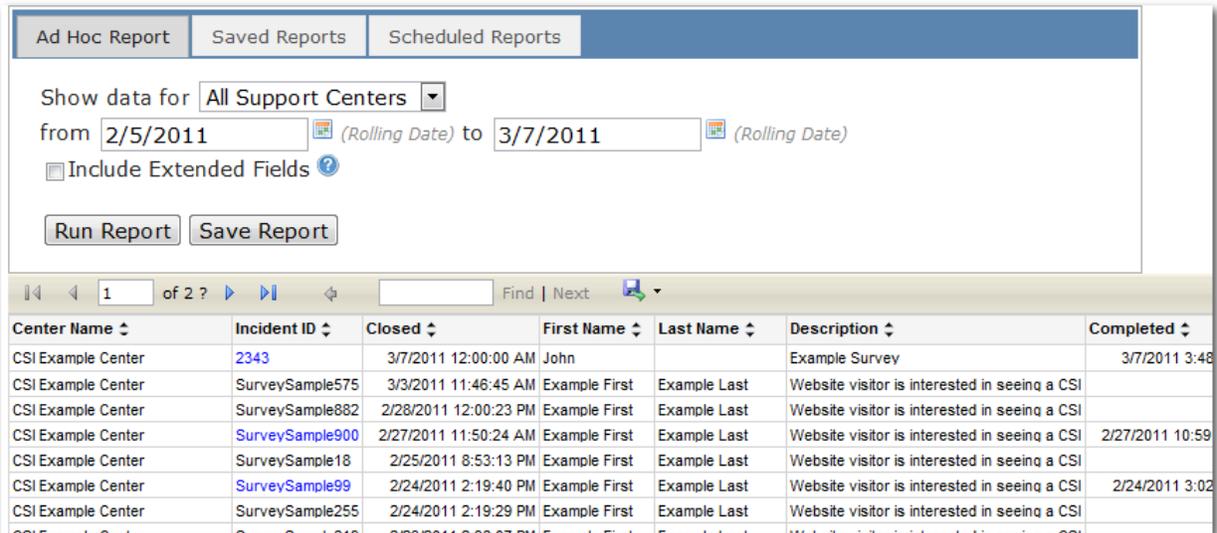
Show data for **All Support Centers** ▾

from **2/5/2011** (Rolling Date) to **3/7/2011** (Rolling Date)

Include Extended Fields ?

**Run Report** **Save Report**

The report appears below:



Ad Hoc Report | Saved Reports | Scheduled Reports

Show data for **All Support Centers** ▾

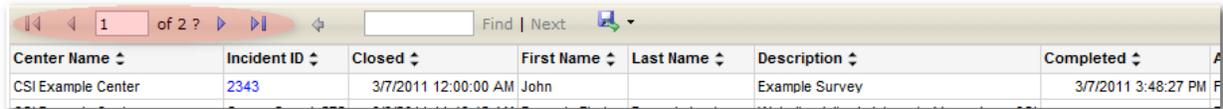
from **2/5/2011** (Rolling Date) to **3/7/2011** (Rolling Date)

Include Extended Fields ?

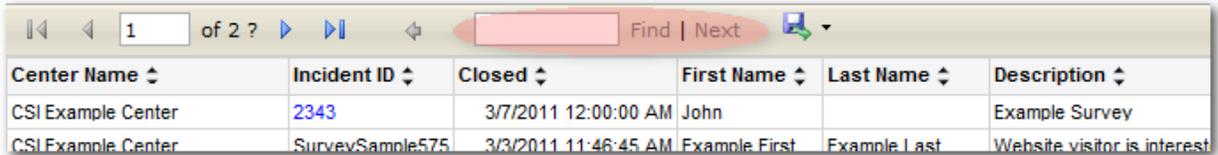
**Run Report** **Save Report**

Center Name	Incident ID	Closed	First Name	Last Name	Description	Completed
CSI Example Center	2343	3/7/2011 12:00:00 AM	John		Example Survey	3/7/2011 3:48
CSI Example Center	SurveySample575	3/3/2011 11:46:45 AM	Example First	Example Last	Website visitor is interested in seeing a CSI	
CSI Example Center	SurveySample882	2/28/2011 12:00:23 PM	Example First	Example Last	Website visitor is interested in seeing a CSI	
CSI Example Center	SurveySample900	2/27/2011 11:50:24 AM	Example First	Example Last	Website visitor is interested in seeing a CSI	2/27/2011 10:59
CSI Example Center	SurveySample18	2/25/2011 8:53:13 PM	Example First	Example Last	Website visitor is interested in seeing a CSI	
CSI Example Center	SurveySample99	2/24/2011 2:19:40 PM	Example First	Example Last	Website visitor is interested in seeing a CSI	2/24/2011 3:02
CSI Example Center	SurveySample255	2/24/2011 2:19:29 PM	Example First	Example Last	Website visitor is interested in seeing a CSI	
CSI Example Center	SurveySample846	2/23/2011 2:09:07 PM	Example First	Example Last	Website visitor is interested in seeing a CSI	

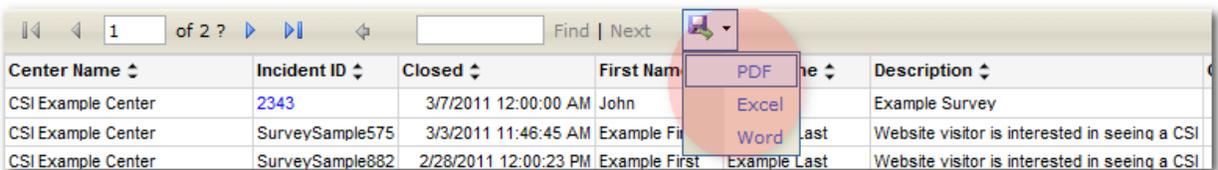
Reports are typically broken up into a number of pages. Use the page navigation controls in the toolbar to navigate between pages:



To search through the report, such as for an incident ID, use the search control:

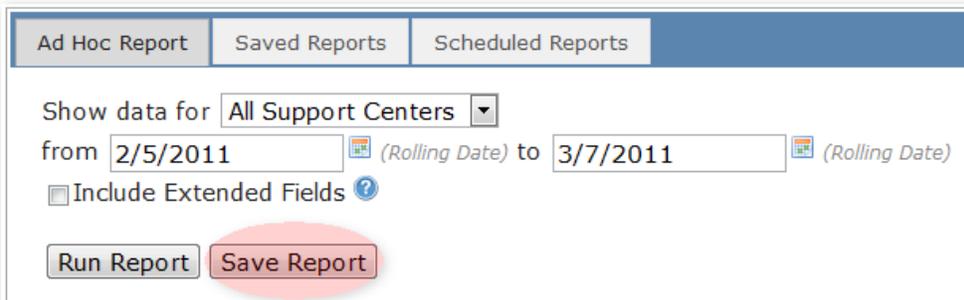


The report can be exported to a number of different formats through this control:



### Saved Reports

If you would like to preserve the settings you have selected for the report, click the “Save Report” button:



Enter a name for the report in the popup that appears. The saved report shows up on the “Saved Reports” tab:



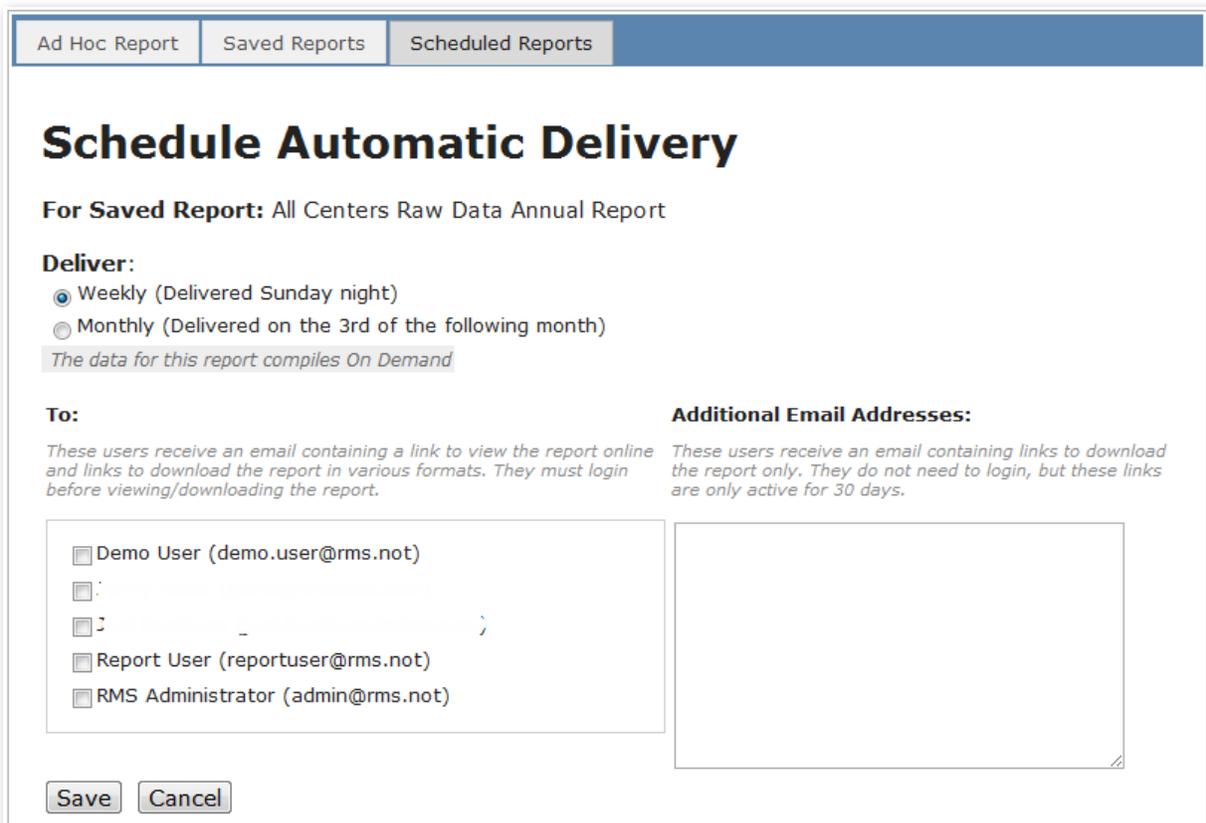
Clicking the name of the saved report on the Saved Reports tab causes that report to load with the settings you saved.

*Note: Saved Reports save your date selections as rolling dates meaning that when you load the saved report in the future, the dates will have rolled forward according to how much time has passed.*

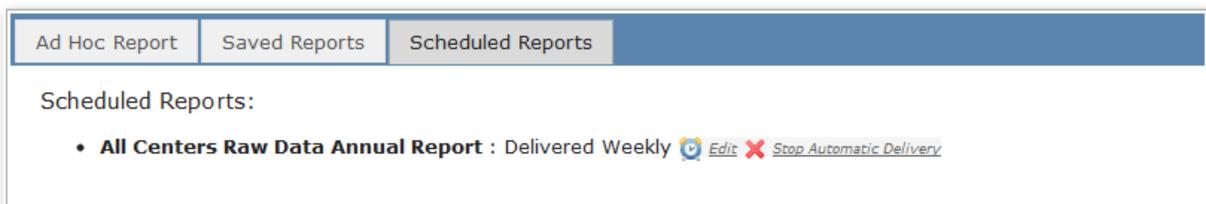
### Scheduled Reports

Once a report has been saved, clicking the “Schedule” button next to it allows you to schedule the saved report for automatic delivery.

Select either weekly or monthly delivery. Then choose the recipients for the report. The list on the left is a list of all users who have a login to your account. These users receive an email containing a link to the report and are allowed to change the report settings when viewing the report. If you do not want to grant a user access to the account but wish to send them a report, add their email address to the “Additional Email Addresses” on the right. These users receive a link to download the report only. This link expires after 30 days.



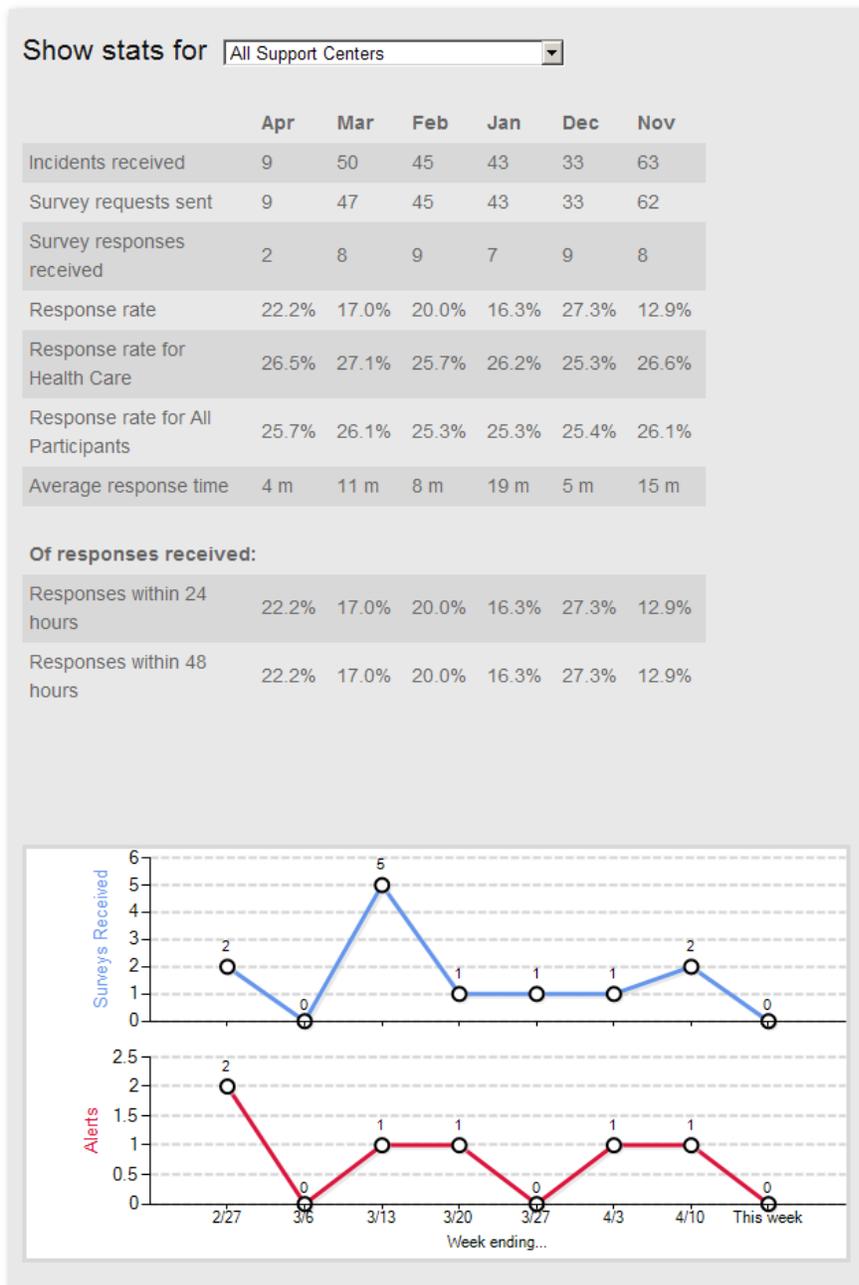
Clicking “Save” adds the scheduled report to the “Scheduled Reports” tab:



## Dashboard

Upon logging in, you will be directed to the Company Statistics **Dashboard**. This page provides various statistics related to your account. The initial display is a summary of data for all of your support centers. If you wish to see statistics for a particular support center, select that support center from the dropdown list.

The Weekly Alerts Dashboard displays graphs showing the number of survey results and alerts received each week over the past 8 weeks.



## Review Incidents

The review incidents page shows you completed surveys for the specified timeframe. Clicking the link in the "Incident ID" takes you to the actual survey. Surveys which triggered an alert are highlighted in pink.

### Review Incidents

Ad Hoc Report
Saved Reports
Scheduled Reports

Show Incidents for All Support Centers ▼

from 2/21/2011 (Rolling Date) to 3/7/2011 (Rolling Date)

Run Report
Save Report

---

⏪ ⏩ 1 of 1 ⏪ ⏩   Find | Next

### Review Incidents: 2/21/2011 - 3/7/2011

Reporting on: All Support Centers

Q1: Courtesy, Q2: Technical, Q3: Timeliness, Q4: Quality, Q5: Overall, CM: Contact Me checked

Incident ID	Date Closed	Customer	Received	Completed	Q1	Q2	Q3	Q4	Q5	CM
<a href="#">2343</a>	3/7/2011 12:00:00 AM	John	3/7/2011 3:46:36 PM	3/7/2011 3:48:27 PM	5	5	5	5	5	
Description: Example Survey										
<a href="#">SurveySample900</a>	2/27/2011 11:50:24 AM	Example First Name	2/27/2011 10:50:24 AM	2/27/2011 10:59:04 AM	5	5	5	5	5	X
Service Agent: Example Agent 2 Description: Website visitor is interested in seeing a CSI Survey in English.										
<a href="#">SurveySample99</a>	2/24/2011 2:19:40 PM	Example First Name	2/24/2011 1:19:40 PM	2/24/2011 3:02:10 PM	1	2	3	4	5	
Service Agent: Example Agent 1 Description: Website visitor is interested in seeing a CSI Survey in English. Customer Comments: Test feedback.										

## Agent Reporting

CSI can help you track and determine the service performance of individual agents in your support center. *To enable Agent Reporting within CSI, your incident notifications will need to include the <agent1> field.* As surveys are completed, CSI updates this report nightly.

Upon accessing the Agent Reports, you will be presented with a summary of the overall performance of all agents within your company.

### Agent Performance

Ad Hoc Report
Saved Reports
Scheduled Reports

Showing data for All Support Centers ▼

from 3/7/2010 (Rolling Date) to 3/7/2011 (Rolling Date)

Run Report
Save Report

---

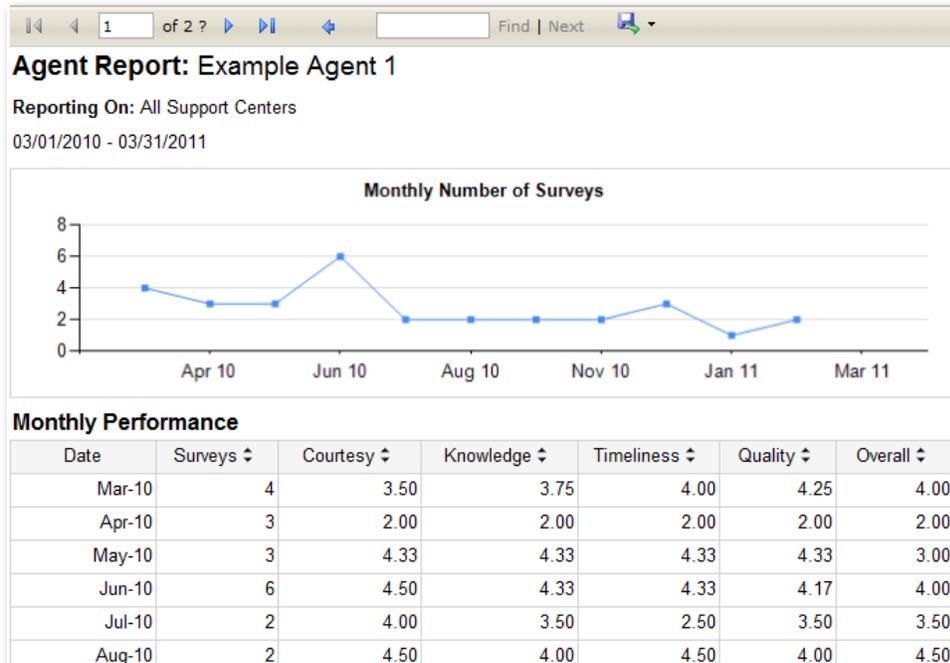
1 of 1 Find | Next

#### Agent Report: All Agents

Reporting On: All Support Centers  
03/07/2010 - 03/07/2011

Agent ↕	Surveys ↕	Courtesy ↕	Knowledge ↕	Timeliness ↕	Quality ↕	Overall ↕
<a href="#">Example Agent 1</a>	30	3.87	3.83	3.83	3.77	3.70
<a href="#">Example Agent 2</a>	34	3.74	3.59	3.53	3.71	3.76
<a href="#">Example Agent 3</a>	27	3.96	3.93	3.62	3.74	3.85

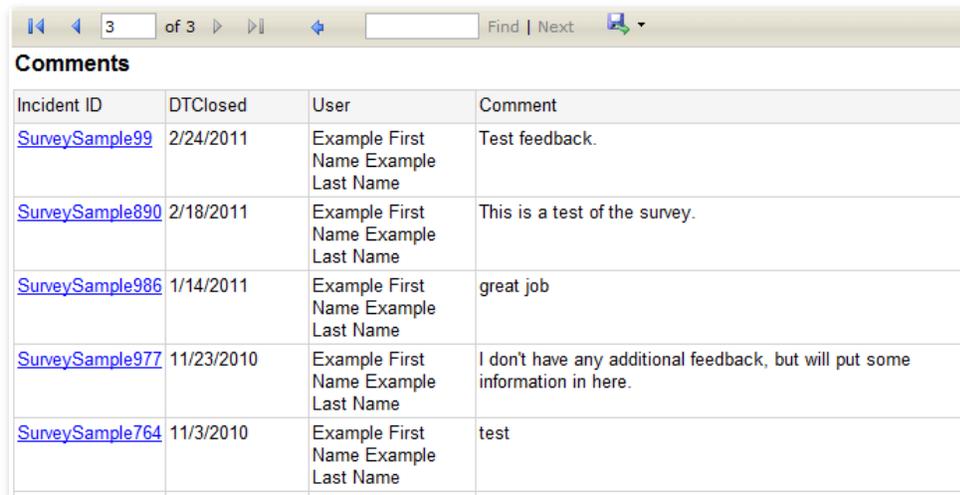
Click an Agent’s name in the “Agent” column to drill down on that agent. Drilling down reveals a breakdown of the agent’s stats per month:



The second page contains a graph of these numbers:

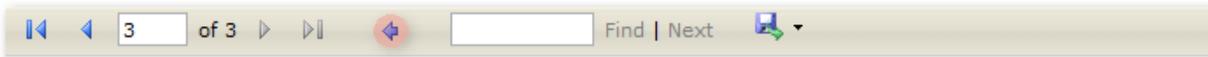


And finally, the 3<sup>rd</sup> page contains all of the comments this agent has received:



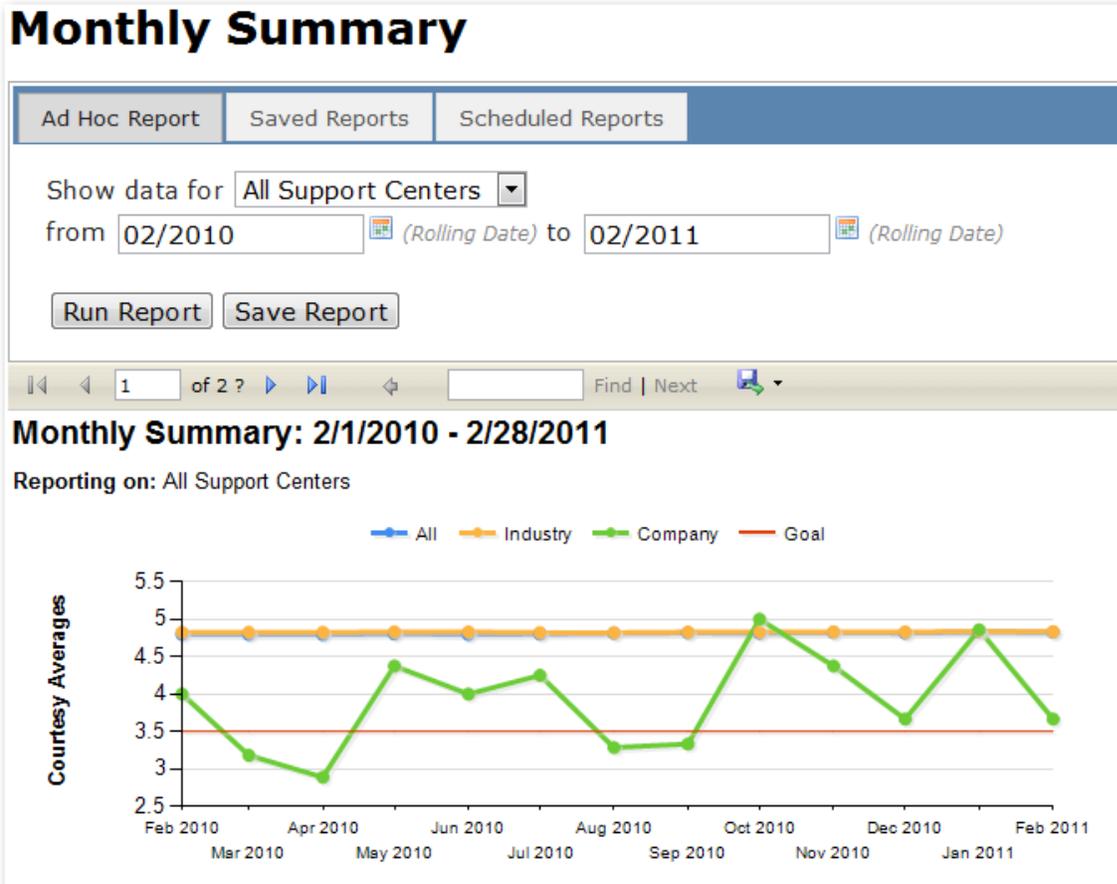
Incident ID	DTClosed	User	Comment
<a href="#">SurveySample99</a>	2/24/2011	Example First Name Example Last Name	Test feedback.
<a href="#">SurveySample890</a>	2/18/2011	Example First Name Example Last Name	This is a test of the survey.
<a href="#">SurveySample986</a>	1/14/2011	Example First Name Example Last Name	great job
<a href="#">SurveySample977</a>	11/23/2010	Example First Name Example Last Name	I don't have any additional feedback, but will put some information in here.
<a href="#">SurveySample764</a>	11/3/2010	Example First Name Example Last Name	test

To return to the master agent list, click the back button on the toolbar:



## Monthly Summary

The Monthly Summary report shows you summarized data by month and includes comparisons to your industry. The first page contains charts for each question:



The second page contains a table of the data for each question:

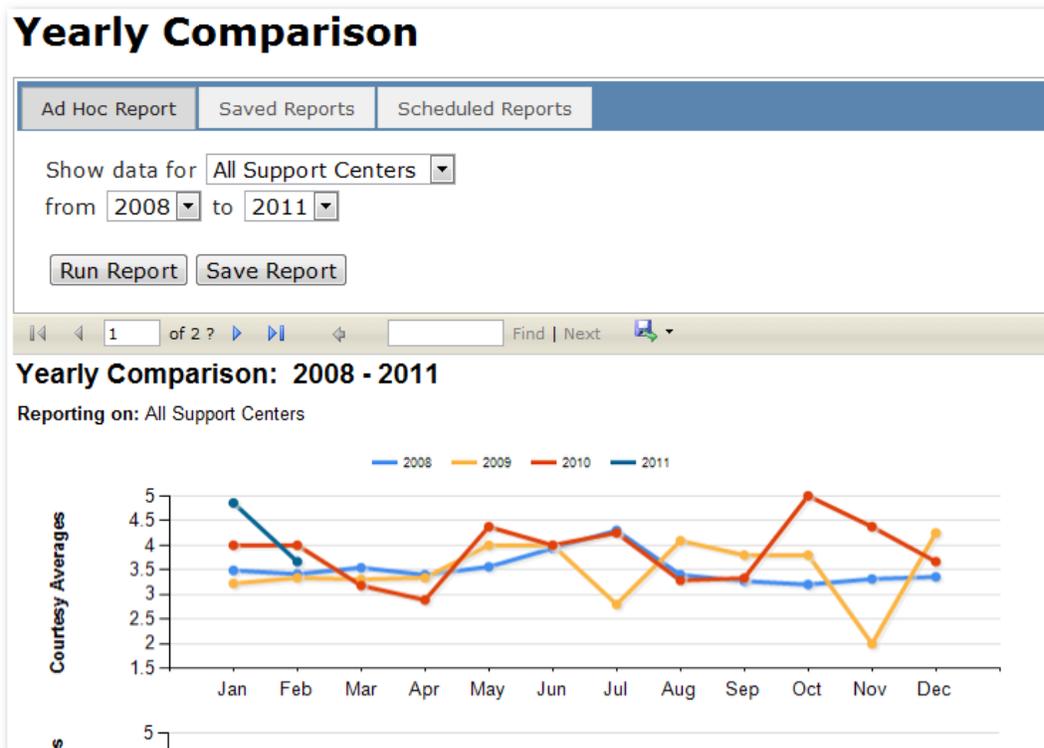
			Feb 2010	Mar 2010	Apr 2010	May 2010	Jun 2010	Jul 2010	Aug 2010	Sep 2010	Oct 2010	Nov 2010	Dec 2010	Jan 2011	Feb 2011	
Courtesy	Company	Average	4.00	3.18	2.89	4.38	4.00	4.25	3.29	3.33	5.00	4.38	3.67	4.86	3.67	
		Surveys	4	11	9	8	15	4	7	3	2	8	9	7	9	
	Industry	Average	4.82	4.83	4.82	4.83	4.83	4.82	4.82	4.83	4.83	4.83	4.83	4.83	4.84	4.83
		Surveys	21,869	24,832	25,076	22,588	25,306	25,203	26,934	25,934	26,142	25,161	23,207	27,394	24,451	
	All	Average	4.80	4.79	4.79	4.80	4.79	4.80	4.81	4.82	4.81	4.82	4.81	4.83	4.82	
		Surveys	59,150	67,941	69,386	61,768	70,404	73,049	79,816	75,188	76,297	73,865	69,832	86,943	78,854	
Goal		3.50	3.50	3.50	3.50	3.50	3.50	3.50	3.50	3.50	3.50	3.50	3.50	3.50		
Knowledge	Company	Average	3.50	3.36	3.11	4.00	3.93	4.25	3.71	3.00	4.50	4.00	3.33	4.14	4.11	
		Surveys	4	11	9	8	15	4	7	3	2	8	9	7	9	

## Weekly Summary

The weekly summary presents a similar report to the Monthly Summary except that it summarizes the data by week instead of month.

## Yearly Comparison

The yearly comparison shows you a year over year comparison by month of your scores. The first page contains graphs:

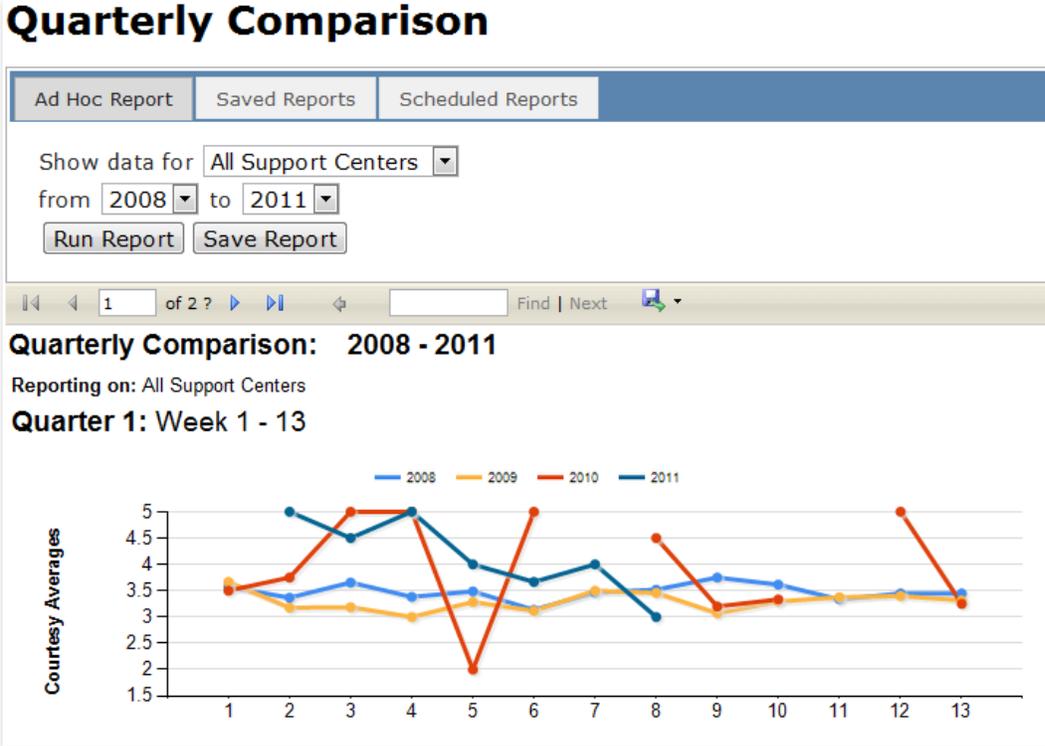


The second page contains the data in a table:

		Year	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
Courtesy	2008	Average	3.49	3.42	3.54	3.40	3.56	3.94	4.30	3.40	3.27	3.20	3.31	3.36
		Surveys	131	113	116	100	114	16	10	90	63	74	70	56
	2009	Average	3.22	3.34	3.31	3.34	4.00	4.00	2.80	4.09	3.80	3.80	2.00	4.25
		Surveys	58	65	42	47	8	10	5	11	5	5	3	4
	2010	Average	4.00	4.00	3.18	2.89	4.38	4.00	4.25	3.29	3.33	5.00	4.38	3.67
		Surveys	8	4	11	9	8	15	4	7	3	2	8	9
	2011	Average	4.86	3.67										
		Surveys	7	9										
Knowledge	2008	Average	3.56	3.60	3.61	3.32	3.61	3.81	4.30	3.48	3.30	3.32	3.44	3.30
		Surveys	131	113	116	100	114	16	10	90	63	74	70	56
	2009	Average	3.19	3.37	3.36	3.51	3.88	3.80	2.40	3.64	3.00	3.00	2.67	4.00
		Surveys												

## Quarterly Comparison

The quarterly comparison presents a similar report as the Yearly Comparison, but is broken down by week and is separated into quarters. The first 4 pages correspond to the quarters.



The second set of 4 pages contain the data in tables:

5 of 6 ? Find | Next

#### Quarter 1: Week 1 - 13

	Year		1	2	3	4	5	6	7	8	9	10	11	12	13
Courtesy	2008	Average	3.57	3.37	3.66	3.38	3.49	3.14	3.46	3.52	3.75	3.62	3.33	3.45	3.45
		Surveys	35	30	29	34	37	22	28	27	20	39	27	29	29
	2009	Average	3.67	3.18	3.19	3.00	3.29	3.12	3.50	3.46	3.07	3.29	3.38	3.40	3.32
		Surveys	9	17	16	9	14	17	12	24	14	17	16	20	19
	2010	Average	3.50	3.75	5.00	5.00	2.00	5.00		4.50	3.20	3.33		5.00	3.25
		Surveys	2	4	1	1	1	1		2	5	3		1	4
	2011	Average		5.00	4.50	5.00	4.00	3.67	4.00	3.00					
		Surveys		4	2	1	1	3	3	2					
Knowledge	2008	Average	3.71	3.53	3.62	3.59	3.70	3.36	3.61	3.67	3.80	3.62	3.52	3.52	3.55
		Surveys	35	30	29	34	37	22	28	27	20	39	27	29	29

## Raw Data

This feature allows you to access your raw data, including incident notification data and the survey responses generated by each notification. Downloading this report to excel allows for extended analysis possibilities.

### Raw Data

Ad Hoc Report Saved Reports Scheduled Reports

Show data for All Support Centers

from 2/5/2011 (Rolling Date) to 3/7/2011 (Rolling Date)

Include Extended Fields

Run Report Save Report

---

1 of 2 ? Find | Next

Center Name	Incident ID	Closed	First Name	Last Name	Description	Completed	Alert	Q1	Q2	Q3	Q4	Q5
CSI Example Center	2343	3/7/2011 12:00:00 AM	John		Example Survey	3/7/2011 3:48:27 PM	False	5	5	5	5	5
CSI Example Center	SurveySample575	3/3/2011 11:46:45 AM	Example First	Example Last	Website visitor is interested in seeing a CSI		False					
CSI Example Center	SurveySample882	2/28/2011 12:00:23 PM	Example First	Example Last	Website visitor is interested in seeing a CSI		False					
CSI Example Center	SurveySample900	2/27/2011 11:50:24 AM	Example First	Example Last	Website visitor is interested in seeing a CSI	2/27/2011 10:59:04 AM	True	5	5	5	5	5
CSI Example Center	SurveySample18	2/25/2011 8:53:13 PM	Example First	Example Last	Website visitor is interested in seeing a CSI		False					
CSI Example Center	SurveySample99	2/24/2011 2:19:40 PM	Example First	Example Last	Website visitor is interested in seeing a CSI	2/24/2011 3:02:10 PM	True	1	2	3	4	5

Each row contains all of the incident data that you sent to CSI and the survey scores and additional feedback if the survey has been completed.

## International

This report provides a breakdown of CSI survey volumes and average scores by country.