



## WinCati Call Center Manager for Qualtrics (CCM)

This feature enables users to combine the robust WinCati Call Management System with Qualtrics Online Survey System.

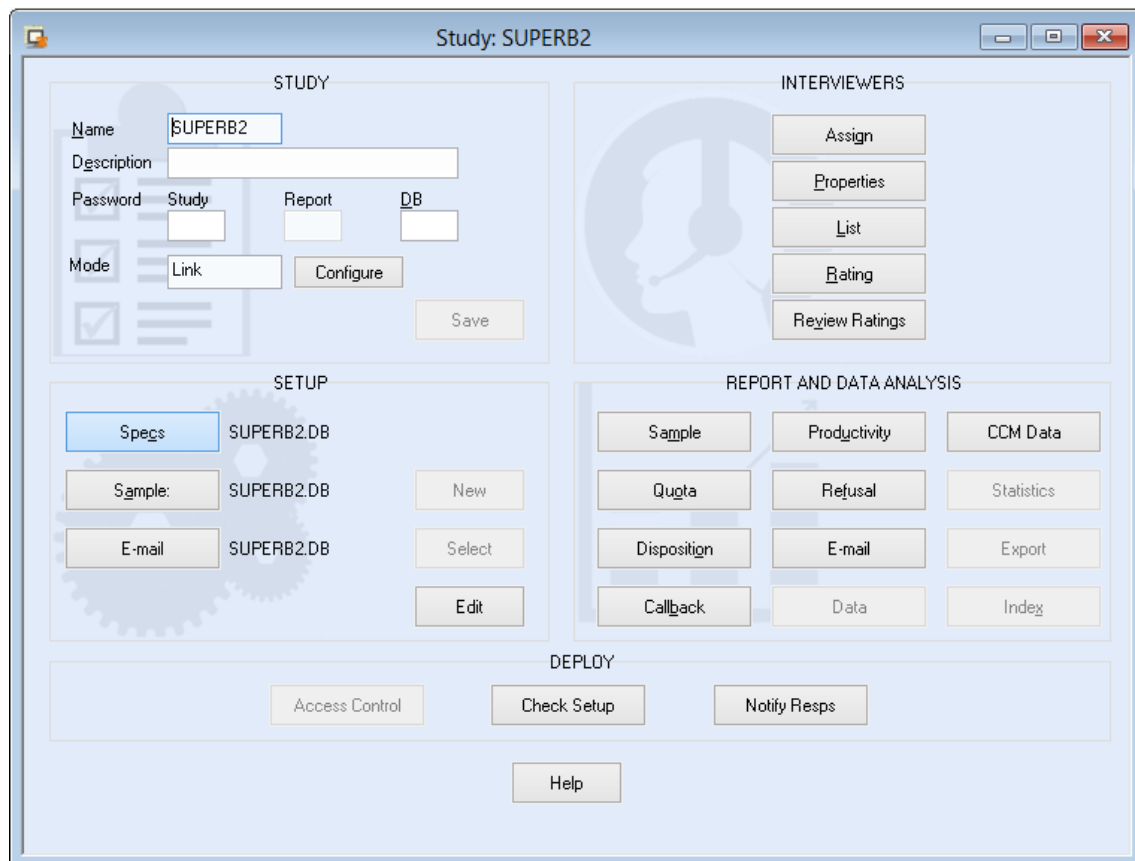
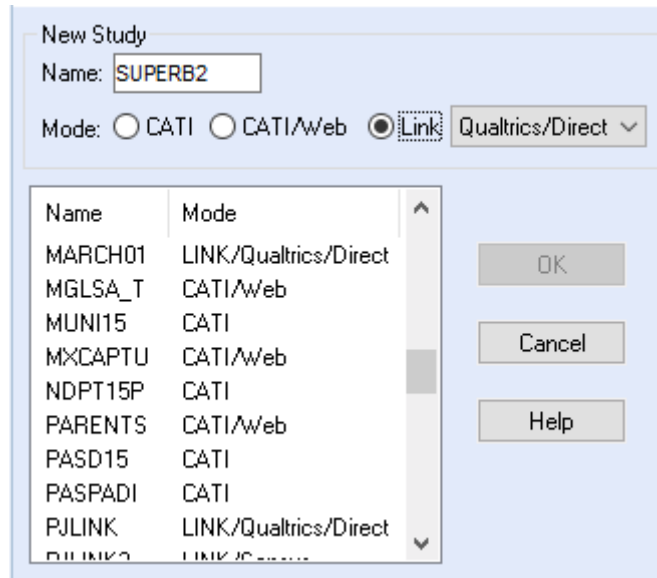
The biggest advantage of this integration is the ability to easily build a survey using Qualtrics and achieve more completes by reaching your demographic and quotas through **Phone, Web, and Phone/Web** mixed mode interviews, providing Qualtrics customers with the ability to reach Respondents in the mode in which they want to be reached (or are available).

Computer-assisted telephone interviewing (CATI) sample and study management, reporting, and interviewer monitoring are all built in efficiencies.

This feature provides:

- Seamless linking to Qualtrics from the WinCati Interviewer application while all attempt and callback information is recorded in the WinCati database.
- Moving information back and forth between the WinCati sample database fields and Qualtrics. WinCati sample database information can be used to customize Qualtrics Survey text. Unlimited amount of information can be stored and dynamically updated in the WinCati sample database.
- Fully functional WinCati Call Management reports.
- Telephone/Web mixed mode interviewing using this feature.
- Onsite and offsite interviewing and supervision

To enable this feature, simply create a **LINK** study type in WinCati Supervisor.



Click “Configure” button to access a simple Configuration screen for link setup.

**Configure Link**

Survey URL

Address (http://): %GD%

Data (http://): http://stihost.us/sw5/ssvec.aspx

Web Server Address (http://): http://stihost.us/sw5

WinCali Web Service (host:port): server2:8091

Restart Introduction

Text: %NAME%, we will restart survey from where you left off last time.

Pass Out Variables

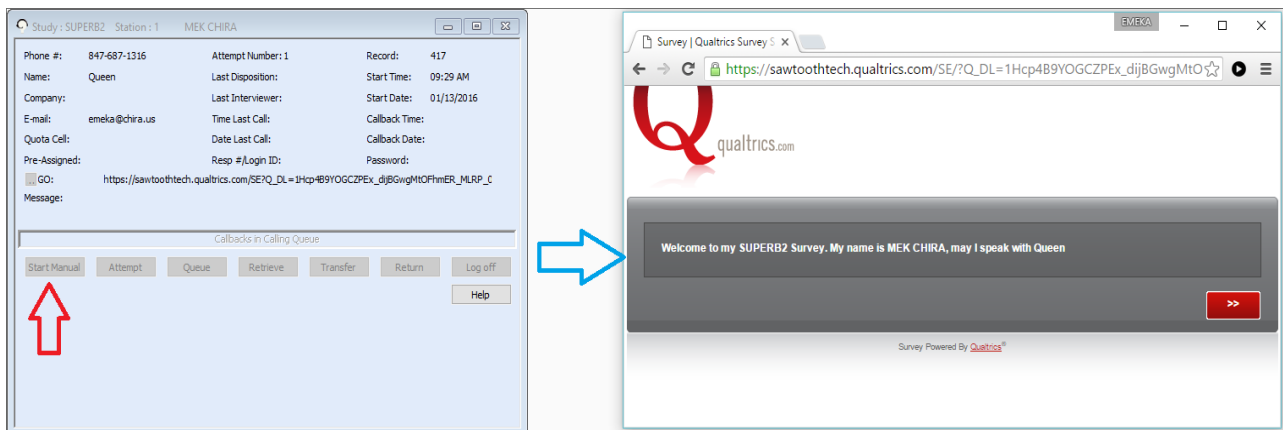
<input type="checkbox"/> Record Number	<input type="checkbox"/> Address	<input type="checkbox"/> Prefix	<input checked="" type="checkbox"/> Current Interviewer Name
<input checked="" type="checkbox"/> Name	<input type="checkbox"/> City	<input type="checkbox"/> Country Code	<input type="checkbox"/> Current Interviewer ID
<input type="checkbox"/> Title	<input type="checkbox"/> State	<input type="checkbox"/> Area Code	<input type="checkbox"/> Last Contact Date
<input type="checkbox"/> Company	<input type="checkbox"/> Zip	<input type="checkbox"/> Telephone	<input type="checkbox"/> Last Contact Time
<input type="checkbox"/> Email	<input checked="" type="checkbox"/> Country	<input type="checkbox"/> Extension	<input type="checkbox"/> UDFs
		<input type="checkbox"/> Suffix	

Full Survey URL

%GD%?Name=%Name%&Country=%Country%&CurrentInterviewerName=%CurrentInterviewerName%

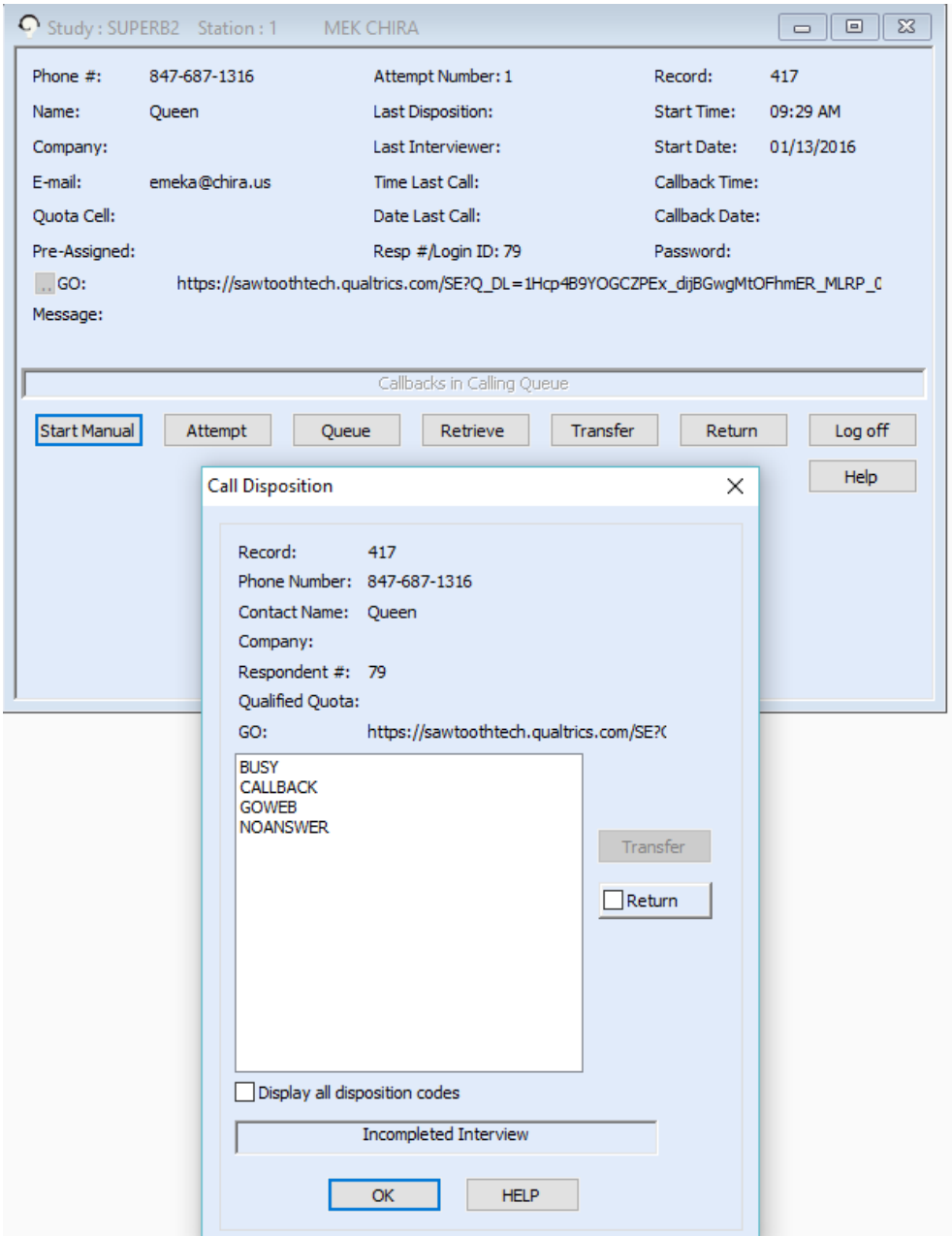
Save Cancel Help

At the beginning of the interview, the Interviewer application seamlessly connects to the Qualtrics survey. The linking process is completely transparent to the interviewer.



When interview ends, focus switches to the interviewer application for call dispositioning.

For a completed survey, an “End of Survey” link is used to update the WinCati databases with interview outcome – once again, this process is completely transparent to the interviewer.



## Qualtrics Side Configuration

The CCM application has the capability to re-start a partially completed Qualtrics Interview at a scheduled date and time.

As part of creating a WinCati Sample Database for this Survey, “Individual Survey Distribution Links” are generated in Qualtrics. No email invitations are sent out in Qualtrics.

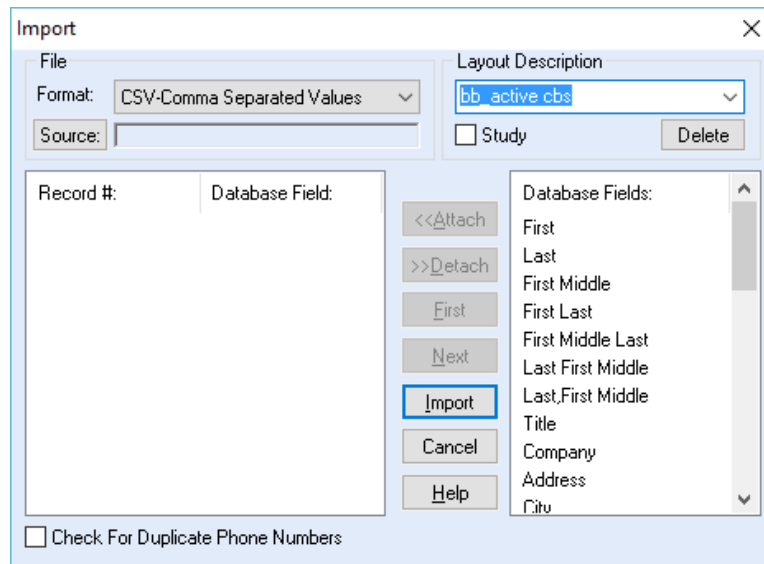
WinCati requires area code and telephone number for each sample record. These can be added to the Qualtrics Panel before exporting Sample information to CSV format or added as a separate column after the generated links are exported.

Additionally, other needed Sample database information can be added and the CSV Sample Records are swiftly imported into the WinCati sample database.

The unique links are used for the WinCati/Qualtrics interviews as initiated from the WinCati Interviewer application

The image shows a form titled "Generate Individual Distribution Links:" with the subtitle "Manually generate survey links without sending email invitations." The form contains two dropdown menus: "To:" with a value of "Please Select..." and "Links Expire In:" with a value of "60 days". At the bottom right of the form are two buttons: "Advanced Options" (a link) and "Generate Links" (a button with a green checkmark icon).

A simple screen is used to import the sample records into WinCati.



## Embedded Data

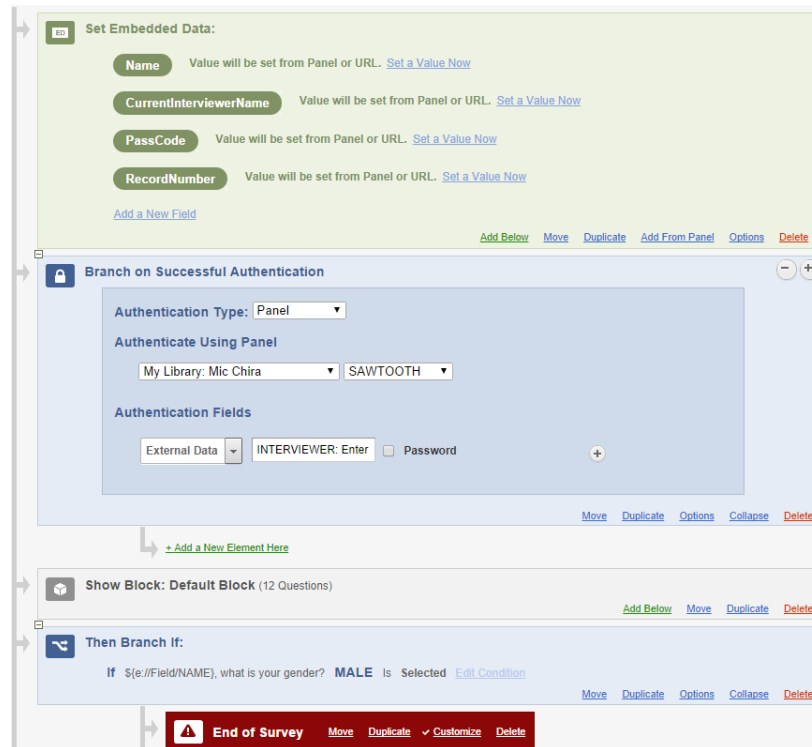
Variables that are passed through the Survey URL from WinCati are brought into Qualtrics by declaring the same variables in Qualtrics “Set Embedded Data” screen.

Variables values can be used to customize Qualtrics surveys or saved to the Respondent datasets. For example, a respondent’s address can be piped into a question to ask if this is their correct address.

Additionally, information collected in Qualtrics surveys can also be passed from Qualtrics back to the WinCati database by specifying required parameters in Qualtrics “End of Survey” element.

***WinCati has a robust sample database built on Sybase relational database. Almost an unlimited amount of information can be dynamically stored for each record in WinCati sample database. This is another huge advantage of this integration.***

Qualtrics “End of Survey” element is customized to link back to WinCati in order to update the WinCati record and pass any necessary survey data to WinCati.



## General System Security

This system uses well-fortified measures to ensure database update security for this integration.

## SSL Encryption

The link to a Qualtrics study is SSL encrypted. The Update Link from Qualtrics back to WinCati is SSL encrypted to protect update data in transit.

## Additional Security Measures

- A variable “Passcode” consisting of **WinCati Respondent Number, a Random Number, WinCati Server IP address and WinCati Study Name** is generated and encrypted for every survey session and passed to the online survey system.

The same variable is sent back to WinCati when the system links back to update WinCati call attempts information. If the expected “passcode” is not received, access to the WinCati database will be denied.

- When survey session begins, the system sets the “In-use status” of the particular record being interviewed to “1”. When the link comes back to WinCati to update the database, the system will deny access if the “In-use status” has changed. This protects the system from formulated and delayed access attacks.