



Confirmit.

# Confirmit Horizons CATI Administrator Manual

**This is document revision 1 of the Conconfirm v23 CATI Administrator Manual, published in May 2018. The information herein describes Conconfirm CATI Supervisor and its features as of Conconfirm CATI Supervisor Build nr. 23.0.2322 New features may be introduced into the product after this revision and build. Go to [www.conconfirm.com](http://www.conconfirm.com) or check “News” on the Customer Extranet for the latest updates.**

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**The companies, names and data used or described in the examples herein are fictitious.**

## What's New in this Revision?

Note: Only the latest changes to this documentation are listed here. Changes made to earlier revisions are listed in the "Changes to the User Documentation" document which can be downloaded from the Conformat Extranet.

The following changes have been made in revision 1 of the Conformat Horizons v23 CATI Administrator Manual:

- This is the first revision of the document.

Note: The general layout and language in this document is continually being corrected, adjusted and improved to ensure the user has the best possible source of information. Only NEW information and details of functionality that has changed since the previous issue are listed here - minor corrections to the text and document layout are not listed.

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# 1 How To Use This Book

This book introduces you to the survey authoring elements that are necessary for preparing CATI or mixed mode surveys.

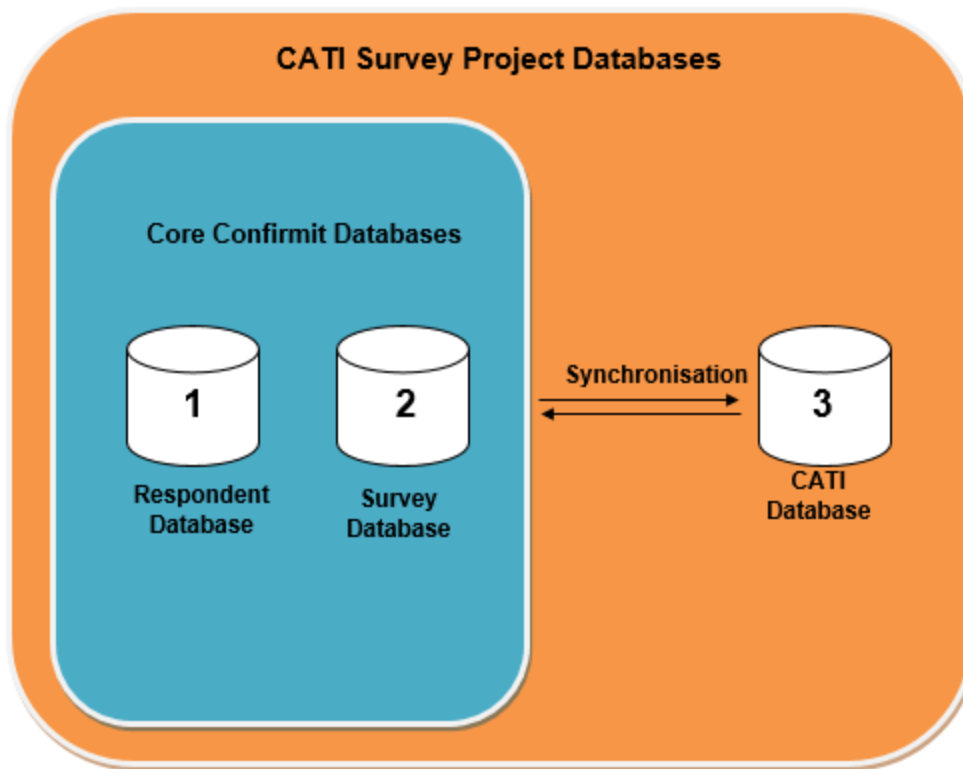
Use this book to learn how to:

- Create a CATI Survey
- Use CATI Functions and Call Blocks
- Develop a CATI Survey Template
- Work with Quotas
- Work with a Dialler
- Create Scheduling Rules

## 2 Introduction to CATI Authoring

The majority of survey authoring concepts and functionality in Confirmit are the same regardless of the data collection mode(s) being used. However there are some additional components required when setting up a survey for telephone interviewing that may not be relevant to other collection methods. For example in a CATI project it is necessary to have a framework in place to guide the interviewer through a process of placing the call, obtaining the respondent and assigning the appropriate outcome.

Confirmit Horizons also has some additional architecture in place behind the scenes to handle the demands of telephone interviewing. The majority of this architecture is completely invisible to the user however it is a good idea for Confirmit Professional users to become familiar with the following survey project database structure.



*Figure 1 CATI survey project database*

1. The respondent database contains background (sample) details for all respondents involved with the survey.
2. The survey database contains the data collected during interviews.
3. The CATI database is used for all aspects of Call Queue administration.

### 3 Getting Started with CATI Surveys

To begin authoring a survey for CATI, users must create a new project first.

After a new project is created it is necessary to assign the collection modes for the survey by going to the Project Management menu and then the Survey Settings option. Next go to the Survey Channels tab and select the checkbox titled "CATI survey". If the survey is to also be run in CAWI mode then you can also check the "Web survey" box.

**Note:** Certain CATI specific functionality in the survey designer will not be available unless the CATI collection mode is enabled.

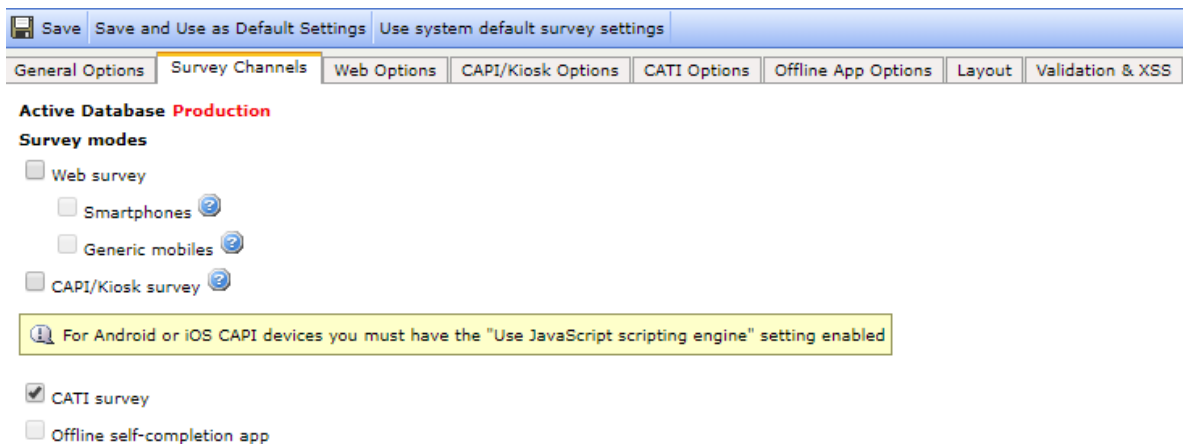


Figure 2 Applying the required survey data collection channels

With the CATI collection mode enabled it is possible to adjust some project settings which relate specifically to telephone interviewing via the CATI Options tab.

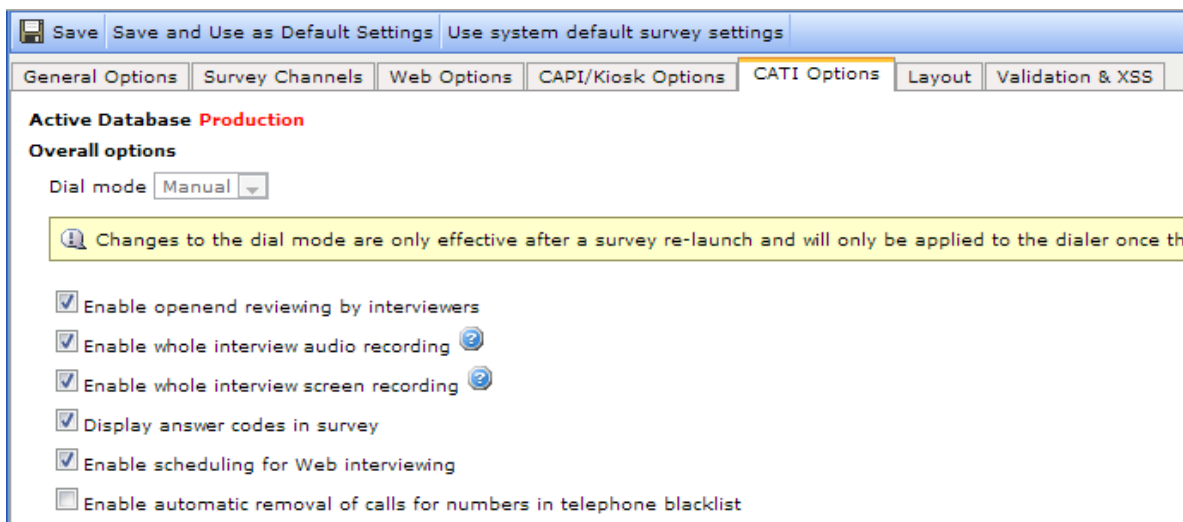




Figure 3 Assigning CATI specific project options



**You should always launch the survey in CATI mode before telephone sample contacts are uploaded (any combination of modes that include CATI is acceptable, but the "CATI survey" mode SHOULD BE enabled). This should be done because after a survey is first launched in a mode other than CATI (CATI mode not enabled) it becomes impossible to convert this survey which contains sample contacts into a CATI mode survey (there is no way to copy sample contacts across to the CATI database).**

**Dial Mode:** For systems enabled with an automatic dialer add-on it is possible to choose between several modes of automatic dialer operation.



**Note: Predictive dialling is only supported if using the appropriate dialer add-on.**

**Modes:**

- **Manual**
  - Interviewers dial numbers manually
- **Preview**
  - Interviewers can preview background information on a contact before allowing/commanding the dialer to commence auto-dialling.
- **Automatic**
  - In this mode the system simply delivers the next connected calls to the interviewers one after another.
- **Predictive**
  - This dialing mode was designed to increase the productivity of the interviewers by performing the so called "predictive" dialing. In this mode the Dialer applies various algorithms that help to deliver the required call to a free interviewer while keeping the number of failed ("nuisance") calls to the bare minimum. The dialer operating in this mode tracks and processes the call results to "predict" (based on the calculated statistics) when the number should be dialed. The aim being that this interview could be delivered to an interviewer precisely after finishing the previous interview.
  - **Hybrid dialing:** Some calls can be flagged to work in Preview mode, while others are dialled predictively. This is especially useful when calling back for appointments where some helpful comments may have been captured in the previous call attempt. The scheduling rules of the survey can set the call to be dialed in Preview mode so that the interviewer can read the comments before starting the call.integrated

**Enable openend reviewing by interviewers:** When checked interviewers will be able to go back over any questions where verbatim responses have been entered at the end of each call.

**Enable whole interview audio recording:** If supported (integrated dialer required), this option will turn on whole interview audio recording for every interview. Audio files are stored on the dialer server indefinitely.

**Enable whole interview screen recording:** This option will turn on video recording for every interview (video recordings can only be accessed by the Supervisor GUI). The monitoring console must be installed to facilitate playback. Screen recordings are held for 30 days on the Confirmit servers.

**Display answer codes in survey:** This option is recommended, when turned on answer code values will be shown next to the answer category checkboxes and radio buttons (required for keyboard support).

**Enable scheduling for web interviewing:** Turn this option on for mixed mode survey projects where there is a requirement to have calls being transferred between modes run through the assigned scheduling rules. When this setting is enabled, completed web interviews will call the execution of the scheduling rules so that the call is dropped from the scheduled CATI calls list.


**Enable automatic removal of calls for numbers in the telephone blacklist:** When the telephone number blacklist is enabled, the system checks each number to be dialed against the blacklist before this number is dialed. If the number to be dialed matches a number that is on the blacklist, this number is not dialed, the corresponding call is not delivered to the interviewer, this interview extended status is changed to "Blacklist", and the scheduling is not run for such call.

## 4 Survey Dispositions (Status Codes)

For Web surveying there are three common statuses used:

- Complete
- Screened
- Quota full.

The survey author can place an interview into any of these statuses by simply inserting a Stop node at the appropriate position within the survey. However for telephone interviewing this list of status types is often too restrictive, users prefer to be able to categorise the stopped interviews into various status categories such as “No reply”, “Busy”, and “Answerphone” for example.

 **Note: When using Extended Status codes the regular status type may be set to “No Change”.**

To overcome this restriction for CATI surveys, survey authors can choose from a much richer list of status types by applying an “Extended Status” value. In total there are 120 available Extended Status types, the first 30 of which are reserved for commonly applied outcomes and the remaining 90 are user definable.

Default group states	
ID	
1	Appointment
2	Busy
3	No reply
4	Quota failure
5	Refusal
6	Terminated
7	Answer phone
8	Modem
9	Fax
10	Congestion
11	Unobtainable
12	Nuisance
13	Completed
14	Screened
15	Returned not dialled
16	Fresh sample
17	Call still in progress
18	Not automatically dialled (ie manual dialling)
19	Status not sensed
20	Transfer to Web
21	Transfer to CATI
22	Transfer to CAPI
23	Transfer to IVR
24	Interrupted by interviewer
25	Returned dialler expired
26	Interrupted by system
27	(Reserved)
28	Stopped
29	Telephony failure
30	Error

**Figure 4 Default Extended Status codes (as seen in the supervisor console)**

When working with CATI surveys it is the Extended Status that the system observes when working in the CATI Supervisor. For example productivity reports, call management and scheduling rules are all driven by Extended Statuses. The three standard CAWI status types have corresponding (overlapping) Extended Status codes:

Quota Full = Extended Status 4  
Screened = Extended Status 14  
Complete = Extended Status 13

It is important to ensure that an appropriate Extended Status is always given to an interview when it reaches a conclusion as well as providing an appropriate setting for the standard status. The Extended Status can either be set via the stop node or by using the scripting function 'SetExtendedStatus'. A stop node in a CATI enabled survey will have an additional entry field labelled 'Extended Status'. The Extended Status is entered as a numerical value (in the range 1..120). The first 30 Extended Status codes are reserved (the labels for these codes cannot be adjusted). The remaining 90 codes are user definable (the labels for these can be customised on a project by project basis if required).

Stop nodes should adhere to the following rules:

1. Define an Extended Status AND (if applicable) the overlapping standard status – e.g.  
Standard Status = Complete  
Extended Status = 13
2. Define an Extended Status, but if there is no overlapping standard status apply 'No Change' - e.g.  
Standard Status = No Change  
Extended Status = 6

The only exception to either rule above is when you have the extended status being defined with a script node using the 'SetExtendedStatus' function. Here typically you just then use a following Stop node as and when you want the interview to be abandoned, in this case it is prevalent to set the stop node with the properties as:  
Standard Status = No Change (or an applicable overlapping status)  
Extended Status = Leave Blank

## 5 CATI Specific Scripting Functions

Several CATI specific functions are available in the system to set / retrieve system data that is used to control the CATI interviewing process.

The most common functions are:

**GetSurveyChannel()** this is used if you are running a multimode project (CAPI, CATI, CAWI). It returns “Capi”, “Cawi” or “Cati”

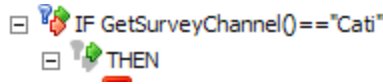


Figure 5 Using GetSurveyChannel Function

It is advisable to always check for CATI as the survey channel even if the project is meant to be for CATI collection just in case the CAWI collection mode is required later on.

**Redo()** can be used together with `SetErrorMessage` to provide a redo-context sensitive error message (this can be defined per language).

Example:

```
Redo('q1')
SetErrorMessage(LangIDs.en, 'Error Message')
```

### GetExtendedStatus() and SetExtendedStatus()

The extended status types each have a corresponding numeric value as shown on the previous page.

**Note:** The status list is also available for supervisors to view within the CATI Supervisor console (under Resources – Extended Status Codes).

`GetExtendedStatus()` will return the value of the current interview's extended status value (integer). If no value is set 0 will be returned.

A typical example of where this may be used is in the End block of a CATI interview. When an interviewer terminates the interview during an interview, the interview is immediately given a `GetExtendedStatus()` value of 6. The End block can then be used to react to this termination. In the example to follow, for interview terminations the type of termination is sub-classified by a termination question and then the interview is further dispositioned to new extended status value depending on the termination type:

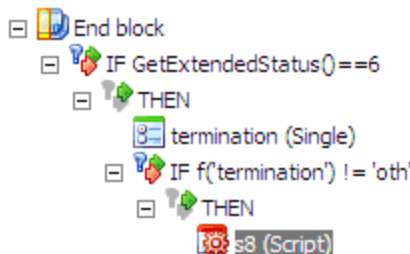


Figure 6 Using GetExtendedStatus function to classify the termination type

It is also possible to define the extended status value for an interview. This can be achieved using a script node. Here SetExtendedStatus(value) can be used to set the value of the extended status, where value is a valid integer extended status value between 1 and 120.

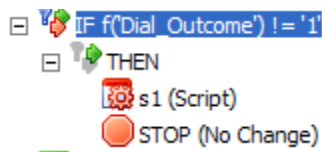


Figure 7 Using a script node to set the Extended Status

The s1 (script node) contains: SetExtendedStatus(f('Dial\_Outcome'));

Where Dial\_Outcome is defined as a hidden question with precodes:

Answers		
English	Precode	Wei
Call answered		1
Busy		2
No repl		3
Refusal		5
Answer phone		7
Modem		8
Fax		9
Unobtainable number		11

Figure 8 Precode values are used to assign extended status codes

The initial contact screen that is used to record the call outcome of the call demonstrates the use of this function. Here we can see the Dial\_Outcome question where the call outcome is recorded.

The precodes here correspond to the extended status code list within the CATI supervisor. Therefore the following script node is used to disposition the interview with a SetExtendedStatus() value corresponding to the precode for the selected category in the Dial\_Outcome question.

The stop node will have a “No change” status

<b>Interview status after stop node</b>	<input type="text" value="No change"/>
<b>Extended status</b>	<input type="text"/>
<b>Deleted</b>	<input type="checkbox"/>
<b>Exclude Translation</b>	<input type="checkbox"/>
<b>Theme</b>	<input type="text"/> <input type="button" value="v"/> <input style="float: right;" type="button" value="?"/>

Figure 9 Applying the “No change” status to a stop node when no other default status is applicable

**GetCatInterviewerID()**

GetCatInterviewerID() returns the ID corresponding to the CATI interviewer as defined by the ID column in the CATI interviewer list in the CATI supervisor. This function can be used to set (store) the interviewers unique ID to a hidden question in the survey.

Example:

```
f('Inter_ID').set(GetCatiInterviewerId());
```

Note: If the variable "Inter\_ID" is contained in a loop then the following should be used:

```
f('Inter_ID',iter).set(GetCatiInterviewerId());
```

**GetCatiInterviewerName()**

This function returns the username of the current CATI Interviewer working on the interview. It can be captured to a hidden variable or displayed on screen.

Example, to display it on the screen...

Hi, my name is ^GetCatiInterviewerName()^, I am calling on behalf of...

The following example shows how to set (store) the interviewers name to a hidden question in the survey named 'Inter\_Name'.

Example:

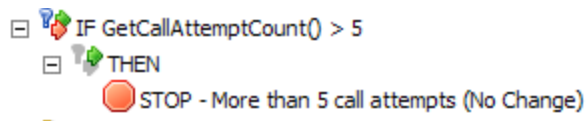
```
f('Inter_Name').set(GetCatiInterviewerName());
```

Note: If the variable "Inter\_Name" is contained in a loop then the following should be used:

```
f('Inter_Name',iter).set(GetCatiInterviewerName());
```

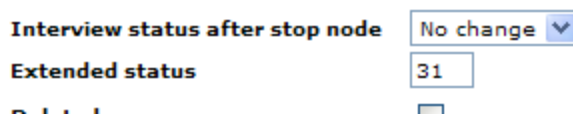
**GetCallAttemptCount()**

The GetCallAttemptCount() function is used to return the number call attempts made to this respondent. For example, if we want to stop calling a number after 5 unsuccessful attempts, we could write something like



*Figure 10 Disposition a call after 5 call attempts*

Where the STOP node object is



*Figure 11 Applying an Extended Status using a stop node*

In this case, the record will be given an Extended Status code 31, which is defined as "More than 5 attempts" in the Supervisor console.

Note: It is also possible to restrict the number of call attempts via scheduling rules. The advantage of this is that Supervisors can adjust the number of call attempts as a variable parameter on a project basis.

For further details on how to accomplish this please refer to the section "Restricting Call Attempts with Scheduling Parameters" later in this document.

**Other useful CATI functions**

The following functions are also available. Please see the Confirmit scripting manual for a comprehensive list and more details on these.

GetTelephoneNumber() and SetTelephoneNumber(value)

GetExtensionNumber() and SetExtensionNumber(value)

GetTimeZoned() and SetTimeZoned(value)

GetLastInterviewStart()

GetLastChannelID()

GetCatiAppointmentTime()

GetTotalAttempts()

GetTotalDuration()

GetCatiRespondentUrl()

AddToCatiBlacklist()

## 6 Call Blocks

Call Blocks are used to call or execute procedures or sub routines of questions that have been created in the dedicated Call Blocks folder. This folder is external to the main questionnaire tree. The execution of a Call Block can be called at any time from within the main questionnaire tree by inserting a “Block To Call” node.

To add a new Call Block object to the tree simply right click on the Call Blocks folder and then choose “Insert Block”.



Figure 12 Inserting a new Call Block

Double-click on the Call Block object to open its properties page.

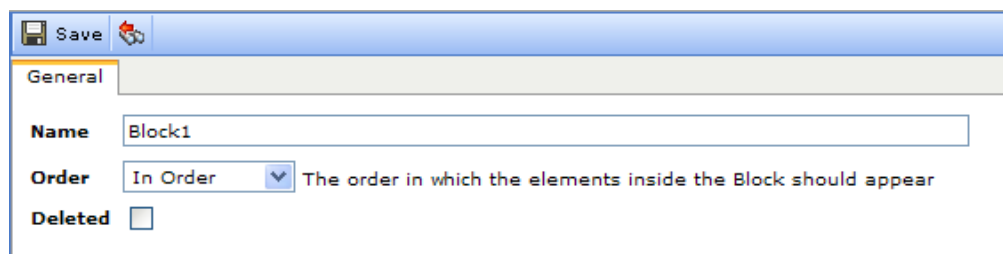


Figure 13 Call Block properties

The properties are as follows:

**Name** - The name of the Call Block. By default the blocks will be named BlockX where X is the number in which it was created. You can rename the block as desired.

**Order** - The order in which the elements within the block are to be presented to the respondent. Click the down-arrow beside the field and select the desired order from the list.

**Note:** This property only applies to the objects inside the selected block.

**Deleted** - If the Call Block has been deleted from the tree and you wish to reinstate it, undelete it by un-checking the box.

Add objects (questions, loops etc.) to the Block as required, using the same methods as when adding objects to the questionnaire.

Any objects added to the Block will be executed when the Block is called by a “Block To Call” node in the questionnaire.

## 7 How to create a “Block To Call”

Having created a Call Block, a “Block To Call” node can be inserted into the questionnaire tree at the point at which the routine it contains is required.

This can be achieved by either right-clicking in the tree at the desired position and then choosing the “Block To Call” node for insertion or by dragging it from the new objects pane.

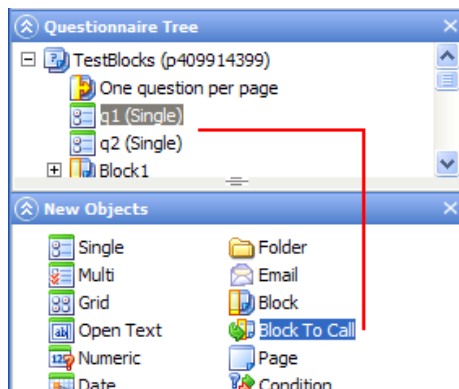


Figure 14 Inserting a Block To Call node

Upon creating the “Block To Call” node a properties pane will appear prompting for a name and a drop down list titled “Block To Call”. The name used here will be given by default (but can be altered if desired). The “Block To Call” drop down list should be used to select the appropriate Call Block (in this case the one created previously, named “Block1”).

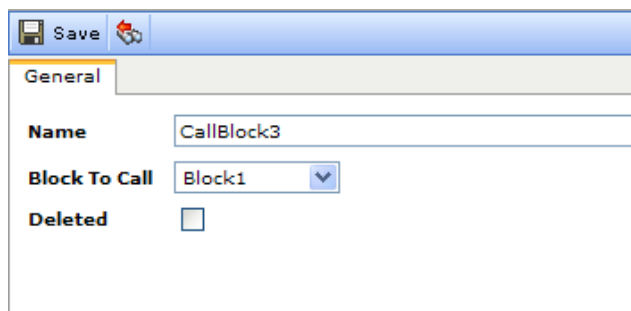


Figure 15 Selecting the “Block To Call”

The properties are as follows:

**Name** - The name of the block. By default the blocks will be named CallBlockX where X is the number in which it was created. You can rename the block as desired.

**Order** - The order in which the elements within the block are to be presented to the respondent. Click the down-arrow beside the field and select the desired order from the list.

Note that this property only applies to the objects inside the selected block.

**Deleted** - If the block has been deleted from the tree and you wish to reinstate it, undelete it by un-checking the box.

## 8 The Start Block

The Start Block is a special type of Call Block that will ALWAYS be activated at the beginning of an interview. Any questions or other objects located within the Start Block will always be the first things that are processed when the respondent starts the questionnaire.

The Start Block will be presented to the respondent whenever he/she enters the questionnaire for first time, and whenever the respondent returns to the questionnaire after a postponement. On returning to the questionnaire, the Start Block will present the answers that the respondent has entered previously. The respondent can then change those answers as required.

A Start Block cannot be deleted from the Questionnaire tree.

**Note: If no questions are added to the Start Block, then it will simply be ignored.**

A Start Block is of particular importance in CATI projects. It is here where we will define the sample information (background questions), check for the CATI collection mode, select the Extended Status (call outcomes), collect call attempt data and retrieve the interviewer name, etc. The image below shows what a “typical” Start Block in a CATI project might look like

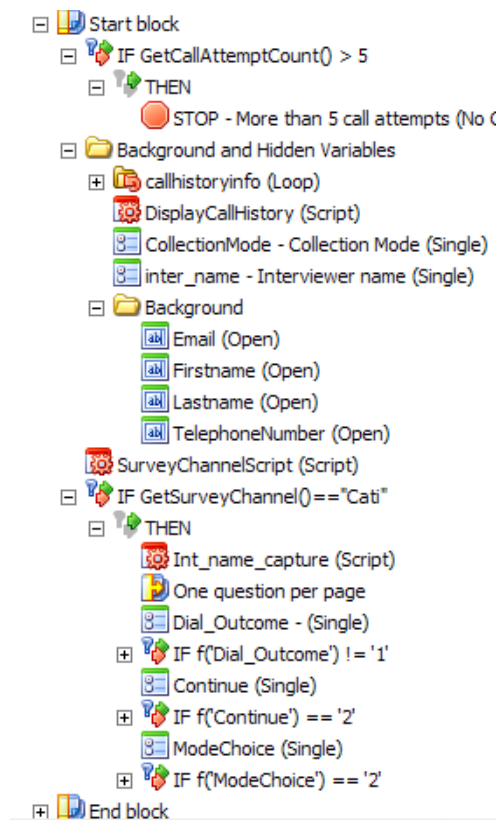


Figure 16 Example Start Block

## 9 The End Block

An End Block is a special case Block that will ALWAYS be activated at the end of an interview. Any questions or other objects located within the End Block will always be the last things that are processed when the respondent completes the questionnaire.

The questions contained within the End Block will be presented to the respondent whenever he/she leaves the interview, either due to postponement or because the questionnaire is completed. If the respondent returns to the interview later, and again leaves it for any reason (perhaps this time the questionnaire is completed), then the questions in the EndBlock will present the answers that the respondent has entered previously. The respondent can then change those answers as required. An End Block object cannot be deleted from the Questionnaire tree.

**Note:** If no questions are added to the End Block then it will be ignored.

The End Block could look like this

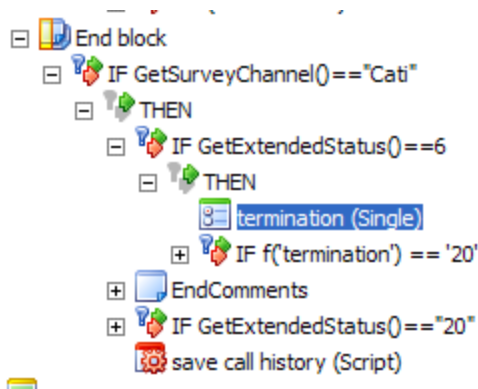
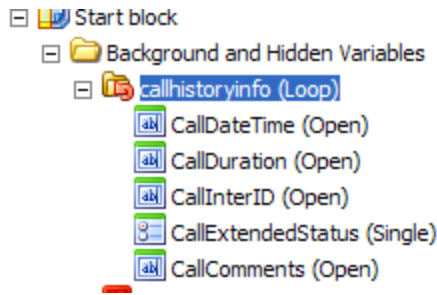


Figure 17 Example End Block

## 10 The CATI Survey Template

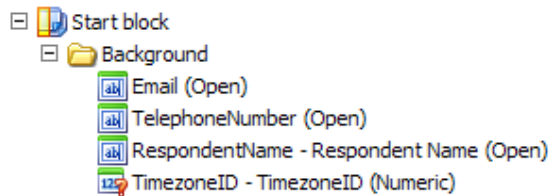
The main CATI call handling framework is contained in the Start block and End block of a survey. To avoid having to redefine this framework for every new CATI survey a survey template should be used. New CATI users are provided with an initial CATI survey template and it is strongly recommended that this is used to begin with. It contains a lot of useful functionality for CATI interviewing and can easily be re-configured.

In the Start Block there is a loop named “callhistoryinfo “, this is used to record call information for every call attempt made on the telephone number.



**Figure 18 Call History loop to capture background call information**

When using a Start Block, background variables for respondent sample fields should be defined at the beginning of the Start Block (not at the beginning of the main questionnaire). In this example these fields have been added to a “Background” folder. The required sample fields are added into this folder. Typically every CATI survey should contain a field for “TelephoneNumber”. The “TelephoneNumber” is treated as a reserved field in Confirmit and so should be entered exactly as shown here. Other reserved fields include Email, TimezoneID and RespondentName.



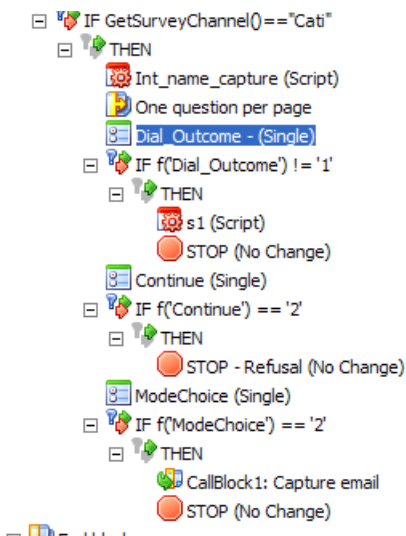
**Figure 19 Background variables in Start block**

If the survey channel is CATI, then the interviewer will enter the CATI specific part of the framework. In manual dialing operation they will then typically be presented with a question displaying a list of possible call outcomes (Extended Status).

If the outcome is not 1 (i.e. call answered) then the interview ends, skipping to the End block where a question is presented to the interviewer asking them if they wish to enter any comments.

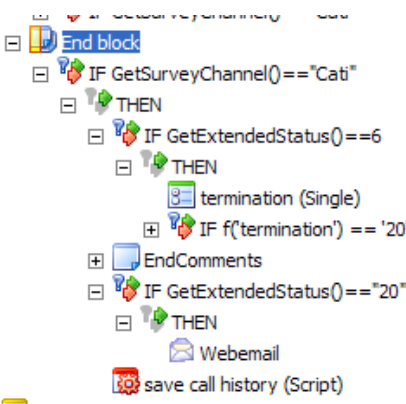
Otherwise, the interview will continue...

A question will then be asked to check if they would like the interview on the phone or the web. If web is selected, the interviewer will then be prompted to ask for an email address.



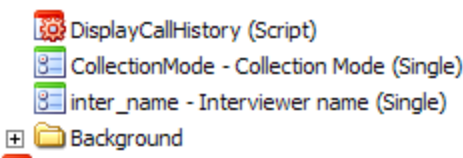
**Figure 20 CATI routing based on call outcome**

If the interview is interrupted at any point, execution of the survey will move to the End Block, a question will be asked to enter the reason for the interruption. Here the interviewer will have the opportunity to transfer to web (email address will be requested). The call history data capture and calculations will also be done here (via the save call history script).



**Figure 21 End block to sub classify termination type or transfer to Web mode**

The call history will be displayed at the beginning of the interview if the phone number has been tried more than once (i.e. previous times it was engaged, no answer etc.) See DisplayCallHistory script in the Background and Hidden variables.



**Figure 22 Script to create display call history information in a table**

# 11 Enabling a variable to be used as CATI filter

There is a way to use any variable as a filter for creating various selections in the CATI Supervisor. When designing a survey in the Confirmit Authoring you can set the appropriate option On for "Open" and "Numeric" questions you would like to use as a filter.

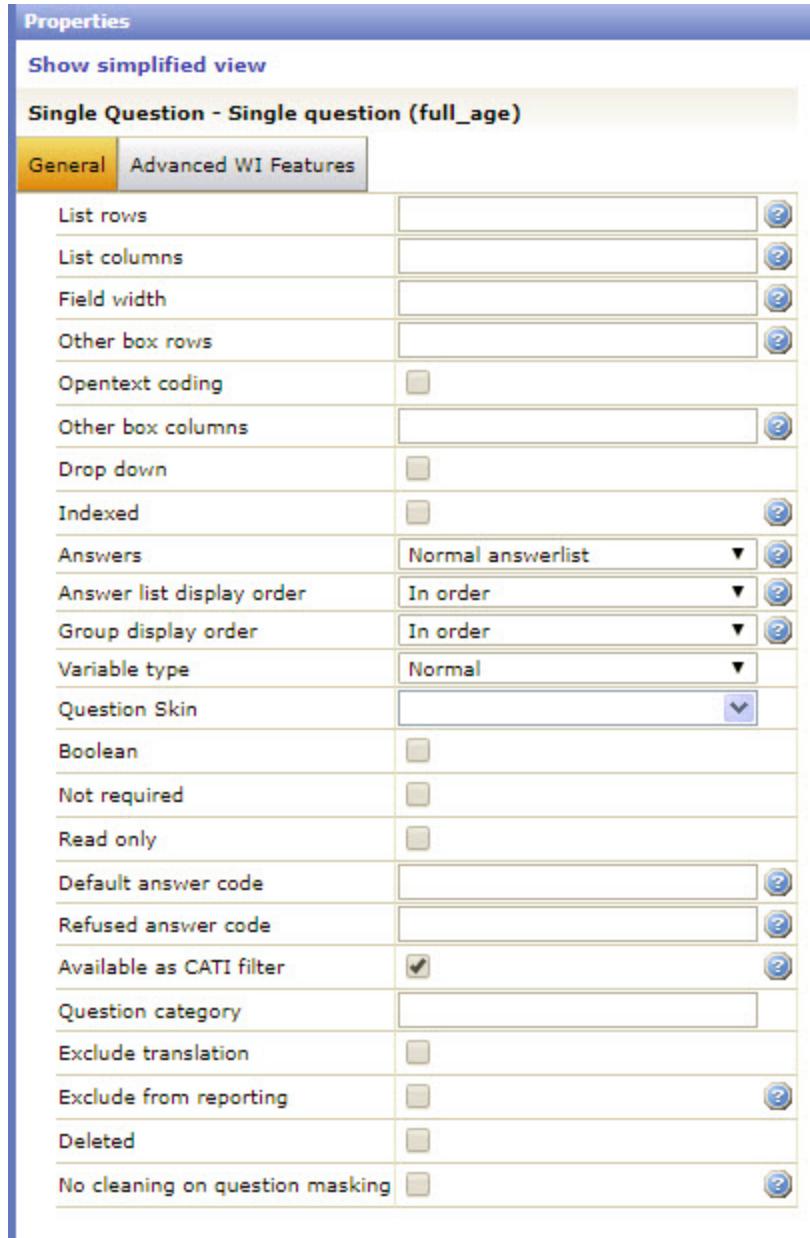


Figure 23 Enabling the "Available as CATI Filter" option for a variable in Survey Designer

The 'Available as CATI filter' property can be enabled for any variable. This will cause the data for the given variable to be replicated to the CATI database. This will enable the variable to be available for various functions in the CATI system, for example to become available as custom columns in Call Management, to be usable as manual interview selection filters or to be used for filtering in the CATI reports.



Note that this option is turned on automatically in case the "Display Quota in CATI Supervisor", or "CATI Delivery when Quota not Full", or both settings are enabled for the quota. The "Available as CATI Filter" property is then turned on for all variables used in the quota. Also see Defining Quotas on page 20.

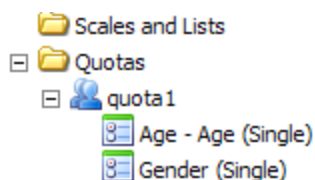


Important! It is vital for the FCD system (Filtered Call Delivery) to be enabled for the system to process the "Quota Fail" calls effectively. Enabling FCD requires the Quota Management tab to be displayed in the CATI Supervisor UI.

## 12 Defining Quotas

A Confirmit project can have one or more quotas, which in turn can be single or multi-dimensional, e.g. Gender (single) Gender x Age (2-dimensional)

Quotas are defined by right clicking on the quota folder of the questionnaire tree and inserting a new quota. A title of 'quota1' will automatically be given to the first defined quota, 'quota2' to the second, and so on. Once defined, you can simply drag and drop the question(s) you need to quota on, into the quota folder. Simpler still you can multi-select the appropriate questions and then right click on one and choose Quota Wizard, this will reduce the number of steps required to complete the quota set up.



**Figure 24 Quota definition added to a survey in Survey Designer**

Note that to manage the defined quota in the CATI Supervisor you have to enable the "Display Quota in CATI Supervisor" option from the Settings tab of the Quota properties view. When this option is enabled, defined quotas become available for use in the CATI Supervisor module - the Quotas tab is added to the Survey View and defined quotas are added to the list of available quotas in the Quotas tab.

Another option called "CATI Delivery when Quota not Full" prevents interviews from being delivered after the quota cell they fall into becomes full. If this option is enabled, all such "excessive" interviews are removed from the CATI call list and assigned an extended status value of 27 ("Filtered by Call Delivery") or held in the scheduled list but set to 'Disabled by quota' status.

Save Update Recalculate All

Quota List Settings

Quota Name: quota3

Quota Full Email: dmitry.kovalev@confirmit.com

Hidden Columns: These columns are included in the quota definition, but are curr

Excluded Columns: These columns will not be included in the quota definition.

Change... Change... Change...

Display Quota in CATI Supervisor  ?

CATI Delivery when Quota not Full  ?

Figure 25 Enabling quota for the CATI system in Survey Designer

**NOTE** Enabling any of these options simultaneously enables the "Available as CATI filter" option (see Enabling a variable to be used as CATI filter on page 18 for details) for all variables that are currently used in this quota. This happens because variables chosen for CATI quotas should become available in the CATI system.

**Important!** It is vital for the FCD system (Filtered Call Delivery) to be enabled for the system to process the "Quota Fail" calls effectively. Enabling FCD requires the Quota Management tab to be displayed in the CATI Supervisor UI.

### 13 Setting Targets

To set the targets, right click on the required quota and select Edit in Grid Mode. The quota matrix will appear on the right screen.

Save Hide Counters Show Remaining Count Update Recal

Quota Grid Settings

**Active Database** Production

Gender:	Male	Female	Total
Age			
18-24	1 1	1 0	2 1
25-34	1 0	1 0	2
35-44	1 0	1 1	2
45+	1 0	1 0	2
Total	4 1	4 1	8

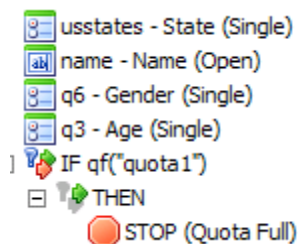
The counters are displayed in red.

Figure 26 Defining quota cell targets

## 14 Checking for Quota Failure

Use the qf("quotaname") function to terminate the interview for respondents who fall into quotas that are full. The qf function returns true if the specified quota is full for the cell.

As shown in the figure below, you can stop the survey for the respondents in a full quota by using a condition and a stop node with status "Quota full".



**Figure 27 Stop node to disposition interviews when a quota cell is filled**

The notification email for a full quota is triggered from the qf('quotaname') function. The notification email is not sent when the respondent filling the quota completes (the last to respond before the quota is full), but when the first respondent reaches the qf('quotaname') function when the quota is full.

## 15 Quota Counts and Quota Target Functions

The function qt is used to retrieve the target set for a particular quota, and qc is used to retrieve the current count.

qt(quotaName)

qc(quotaName)

qt and qc both return an integer. They will return target and count for the quota cell in the quota quotaName corresponding with the current respondent's answers on the questions the quota is based on.

If the respondent qualifies for several quotas within quotaName, qt and qc will return -1.

## 16 Keeping Track of the Quota Counts and Targets

CATI Supervisors can keep track of the quota counts in two places:

1. From the Project Management menu in the main Confirmit UI, by selecting Quota Targets and then the required quota. The following screen appears when clicking on the quota. The supervisor will be able to change the targets on this screen (Prod. Limits).

<input type="checkbox"/>	Age (Age)	Gender (Gender)	Prod. Limit	Counter	Remaining
<input type="checkbox"/>	18-24	[Any]	<input type="text" value="2"/>	1	1
<input type="checkbox"/>	[Any]	Male	<input type="text" value="4"/>	1	3
<input type="checkbox"/>	[Any]	Female	<input type="text" value="4"/>	1	3
<input type="checkbox"/>	18-24	Male	<input type="text" value="1"/>	1	0
<input type="checkbox"/>	18-24	Female	<input type="text" value="1"/>	0	1
<input type="checkbox"/>	25-34	Male	<input type="text" value="1"/>	0	1
<input type="checkbox"/>	25-34	Female	<input type="text" value="1"/>	0	1
<input type="checkbox"/>	35-44	Male	<input type="text" value="1"/>	0	1
<input type="checkbox"/>	35-44	Female	<input type="text" value="1"/>	1	0
<input type="checkbox"/>	45+	Male	<input type="text" value="1"/>	0	1
<input type="checkbox"/>	45+	Female	<input type="text" value="1"/>	0	1

Figure 28 Confirmit quota targets (Prod. Limit) and achieved values (Counter)

2. From the CATI Supervisor UI, by selecting a survey from the surveys list and then by selecting the Quotas tab\*.

\*The Quotas tab is only visible when the quota setting 'Display Quota in CATI Supervisor' is checked on.

Save Hide Counters Show Remaining Count Update Recalculate All Upload Limits

Quota Grid Settings

Quota Name

Quota Full Email

Row Header

Column Header Ordering

Display Quota in CATI Supervisor

CATI Delivery when Quota not Full

## 17 Quotas Based on Background Fields

Another CATI specific quota setting is '**CATI Delivery when Quota not Full**'

The system provides a choice of two alternative system behaviours for handling quota closures. The older (original) behaviour is that when the setting "**CATI Delivery when Quota not Full**" is enabled, CATI interviews will automatically be removed from the CATI scheduled calls list and be given an extended status value of 27 ('Filtered by call delivery') when the quota cell they fall into is fulfilled.

The newer behaviour will automatically set the applicable calls in the scheduled list to be flagged as disabled and so the calls will remain in the scheduled list. The key benefits are:

- Disabled calls will retain their associated call properties (e.g. call priority, call time, user assignment and shift). This is very helpful if the quota needs to be re-opened.
- Quota disabled calls are colour coded in yellow for easy identification in the Call Management UI (calls disabled manually via a supervisor in Call Management are colour coded red)
- If a cell is re-opened (by a supervisor increasing the priority) then the applicable disabled calls will automatically be re-enabled (there is no need to manually re-activate calls as with the old behaviour). The manually disabled (red) calls will remain disabled
- In optimistic quota mode the calls will automatically be disabled as soon as the desired quota limit has been met by the in progress interviews (if the in progress interviews fail to compete then the system will automatically re-enable the applicable calls)

Since there are several benefits of the new behaviour it is recommended to switch over to this if you are not already working with it. To switch to this mode please ask a CATI administrator to go into the Resources/Settings area of the supervisor UI to make the required change (this change is a company level change that will affect all surveys moving forwards) it is possible to switch back although it is not advisable to keep switching back and forth or to make the change while live interviewing is in progress.

Why is this '**CATI Delivery when Quota not Full**' feature useful?

When a survey contains quotas that are based upon background sample variables the CATI system may become slower to deliver calls to interviewers as the quota targets in the project begin to close.

For example:

Imagine a survey that contains a sample based quota for gender and the desired quota target for male respondents has already been achieved. Despite this, there still remains a high number of fresh sample records for male respondents in the call queue. The default operation of Confirmit would be to process these respondents through the execution engine.

As it does so, the male respondents will be automatically dispositioned to the "Quota failure" status as expected. However, since each record is processed one at a time Confirmit may take some time whilst it sorts through the sample to find records that are still applicable to deliver to the interviewer(s). The interviewer(s) would see the screen flickering as calls are being processed and the supervisor may observe a rapid increase in the number of calls being dispositioned as "Quota failure".

To avoid such delays the CATI specific quota setting in Confirmit "CATI delivery when quota not full" can be applied. When this setting is enabled, all interviews in the call queue which fit into any given quota cell will be automatically disabled OR placed into the default extended status "Filtered by call delivery" instantaneously.

This setting is only available for background variables that are based on single type variables (multiple and numeric type questions are not supported).

Note: When a survey has this setting enabled the quota tab will always be made available to Supervisors via the main supervisor control panel (in addition to the "Quota Targets" view in the main Confirmit menu). The variables used in the quota will automatically be given the property 'Available as CATI filter'.

## 18 Call Management with Survey Variables

The CATI system does not work directly with the respondent entries in the core Confirmit respondent database. Instead, it works with a dedicated CATI database which is used for the call management tasks. However, only the system variables get automatically synchronised from the core database to the CATI database (e.g. TelephoneNumber, RespondentName, TimeZoneID).

This has some implications, especially when using quotas which are defined solely with sample variables. Confirmit version 15 introduced a new question property in authoring to allow certain variables to be made available in the supervisors Call Management window.

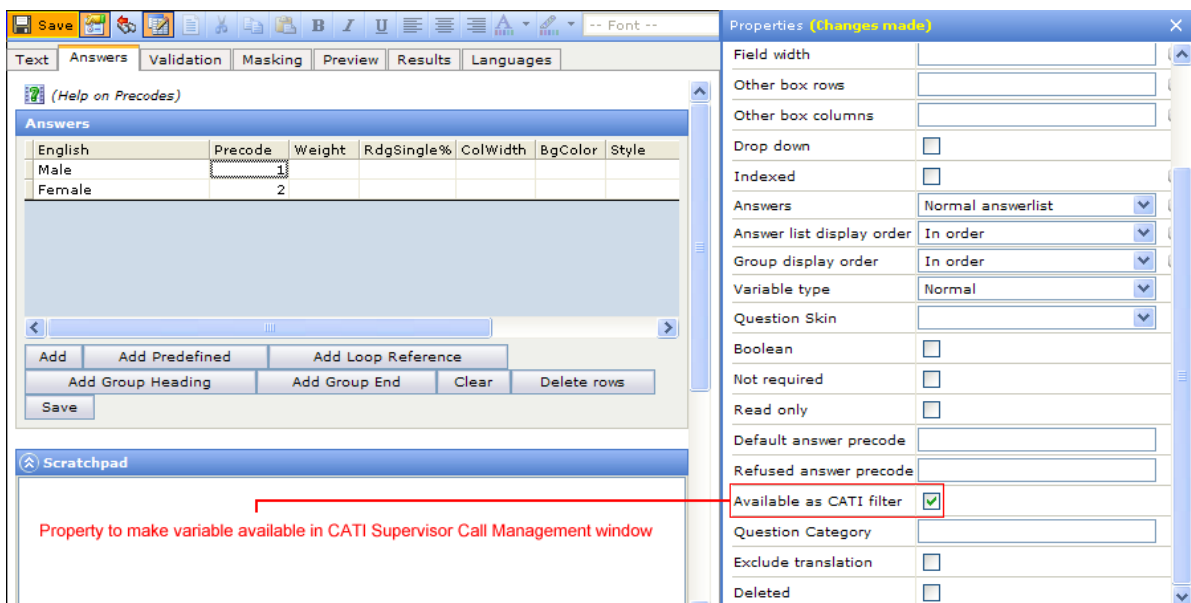


Figure 29 Assigning property to make a variable available in the CATI Supervisor

**Note:** Only a maximum of twenty variables per survey may have this setting applied, the property can be enabled or disabled at any time but the survey will need to be re-launched.

## 19 Default and Refused Answers

For data consistency and interviewer data entry purposes, you can decide if you want a particular answer to be the default answer or the refuse answer. For example:

Answers	
English	Precode
Male	1
Female	2
Refused	ref
DK	dk

Figure 30 Applying precode labels for refused and default answers

In the question properties, define

Default answer precode	dk
Refused answer precode	ref

Figure 31 Setting precode labels in the question properties

The interviewer will then be able to use the Refuse and Default answers during interviewing which can be selected from the bottom right hand corner of the interviewing console or by using their respective keyboard shortcuts.



Figure 32 Interviewer console shortcut buttons

**Note:** Interviewer keyboard shortcuts are Ctrl-d (default) and Ctrl-r (refused).

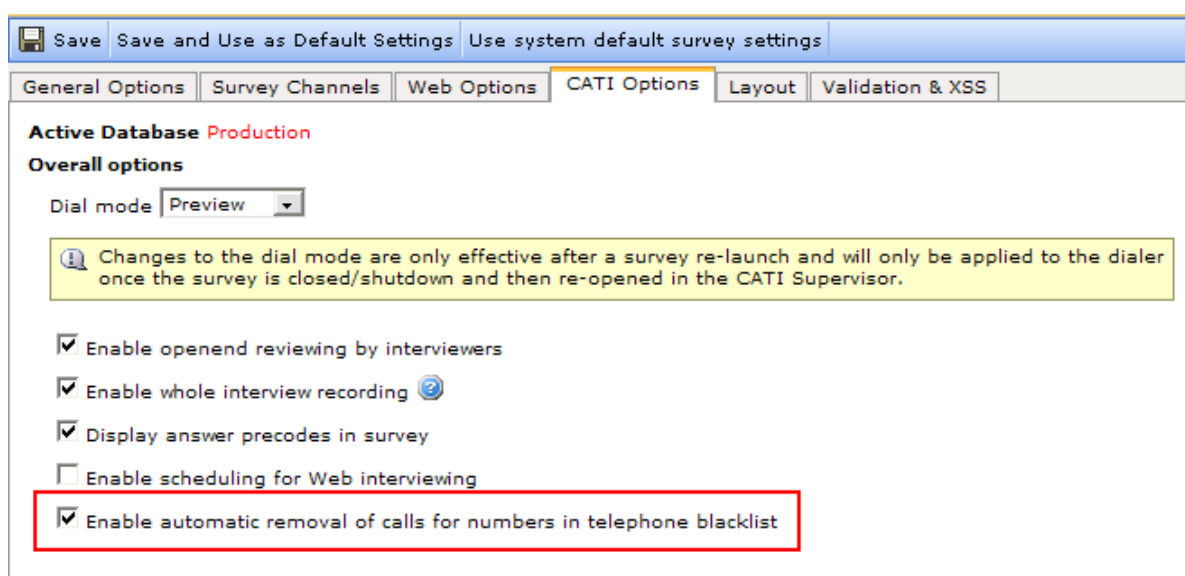
## 20 Blacklisting Telephone Numbers (Do Not Call Lists)

The CATI blacklist feature enables a list to be created which contains any numbers that must never be dialed (either manually or automatically).

The system will check to see if the numbers already exist in the blacklist at the time the sample data is uploaded and again immediately before any call is delivered to an interviewer. If the number from the respondent sample is found in the Blacklist then it's Extended Status is changed to 'Blacklist' (Extended Status value 17) and the number will not be scheduled. A count of rejected numbers can be seen in the Sample Utilisation report.

**Note:** If using a predictive dialer the behaviour will be the same as above, but checking will be invoked when numbers are about to be delivered to the dialler.

In Confirmit Authoring on the Survey Settings - CATI Options tab there is a checkbox to determine if the survey should adhere to the blacklist.



Numbers can be added to the blacklist in the following ways.

1. Via the supervisor user interface

A supervisor can insert a number (or import a list of numbers) by going to the Resources tab and the 'Telephone Blacklist' option. For more info please refer to the CATI supervisor guide.

2. Via the survey

There is a function `AddToCatiBlacklist()` that can be used in the survey to add the current call into the blacklist. This could be added to a script node that it executed if the interviewer codes a response like 'Do not call again' on the dial outcome screen. The call should then be terminated with the appropriate extended status for black listed numbers which is 17.

**NOTE** However it is important to note that setting the extended status of a call to 17 alone is not enough to actually add the current telephone number into the master number Blacklist (this will just set the status of the call in the current survey). To add the number to the blacklist you must also call the `AddToBlacklist()` function.

## 21 Extending Appointment Expiration Timeout For the Logged In Interviewers

It may be desirable to schedule call backs so that they are recalled by the original interviewing agent who made the appointment. However this can cause problems if for some reason the interviewing agent is unavailable when the appointment is due (they might not be working/logged in or they might be busy on another call). To help overcome this it is possible to set the expiration logic so that the system can take into account the actual logged in status of the assigned interviewer. If the interviewer assigned to the appointment is not logged in then it can be quickly re-assigned to other interviewers who are working on the same survey (or part of the same skill group). Alternatively, if the interviewer is logged in, then the assignment can be held to the agent for longer.

A working example is shown below. There are three separate sub rules defined for calls with the "Appointment" status, see the picture below for illustration.

**Note:** It is important that the appointment sub rules are defined in the same order as shown in the screenshot.

Script "Extend assignments for logged in agents" using extended status group "Default group"

Rules	Shifts	Shift Types	Parameters	Custom Script	
Rules		Description			
[-] Rule 1					
SubRules	Filter	Extended Status Code	Extended Status Name	Shift Type ID	Shift Type
[-] 1.1	IsCallExpiredWithResourceLoggedIn(15)	1	Appointment	0	Any
	Filter	Action	Parameter		
		Restore previous call attributes			
[-] 1.2	IsCallExpired() == 1	1	Appointment	0	Any
	Filter	Action	Parameter		
		Set new Call Priority	999		
		Assign user/group(s)	-3		
		Set time to NOW	0		
[-] 1.3		1	Appointment	0	Any
	Filter	Action	Parameter		
		Set new Call Priority	1000		
		Fulfill the specified appointment	0		
		Assign user/group(s)	-2		
		Set Call expiration timeout	1		

Figure 33 Scheduling script used to set up expiration time of an appointment

All three sub rules you see in the picture above are used to process calls with the "Appointment" extended status. Sub rules 1.1 and 1.2 use filters so if the appointment does not meet conditions set by these filters it is processed by sub rule 1.3.

**Sub Rule 1.3** sets up the appointment to be assigned to the interviewer with a short expiration of one minute (this means the appointment will be expired if it is one minute overdue and the interviewer is not logged in).

An action "Assign user/group" with a parameter value of "-2" within the appointment sub rule locks the call to the user/group.


Other actions set the expiration period ("Set Call Expiration Timeout" - this is the time in minutes that the system will wait for the assigned interviewing agent to pick up the appointment), additional actions are used to give the appointment a high priority value (1000 in this example) and to attempt to deliver the appointment instantly (0 minutes before the due time).

**Sub Rule 1.2** uses function "IsCallExpired" as a filter. This means that if an interviewer who created the appointment is logged out at the time when the appointment expires, the system will then re-assign the expired appointment so that other interviewers can work on it.

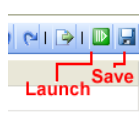
An action "Assign user/group" with a parameter value of "-3" within the appointment subrule removes the appointment lock for the currently assigned user/group. Make sure that this action has the property "Filter enabled" turned on.

The subrule should also contain two additional actions, one to set a high priority (with a value of "999" in this example) and another one to make the call due with immediate effect ("Set Time to NOW" with a value of "0"). The "Filter enabled" property must also be turned on for these actions.

**Sub Rule 1.1** handles expired appointments in case the assigned interviewing agent is logged in but is busy doing another job at the moment. To this end the "IsCallExpiredWithResourceLoggedIn" function is used in this sub rule as a filter. The function argument with the value of "15" in this example extends the appointment expiration time for another 15 minutes. During this time interval the system continuously checks if the status of the interviewer has changed. When the agent becomes free, the appointed call is instantly delivered to him. In case the extended timeout runs out and the interviewer has still not picked up the appointment after this time then expiration sub rule 1.2 will take effect and the call will be re-assigned.

 **Important Note: When working with a survey in Predictive dialing mode it is essential to ensure that any call that are assigned directly to an Interviewer are not scheduled to be dialed predictively. For any calls assigned to Interviewers explicitly it is therefore essential to set the dialing mode for the calls to Preview using a Set Dialing Mode action.**

Once the rules have been configured click on the save button. To make the changes active (for any survey projects currently using this set of scheduling rules) it is also necessary to click the launch button.



The launch process will automatically save the scheduling rules in the current state (without the need to perform a separate save step).

## 22 Scheduling Sample in a Mixed-Mode Project

It may be desirable to load respondent sample data to a mixed-mode project where some records are to be scheduled and assigned for telephone interviewing whilst others will be used only for Web interviewing.

The simplest way to automate this is to create a new column sample named 'catiextendedstatus' and then for CAWI only sample records set the value to be '40' (Extended Status value '40' is Custom10 and used here as an example but any spare custom status could be used). When loading the sample the default 'simple scheduling' mode will automatically filter out the CAWI sample to the not scheduled list with an Extended Status value of 40 (with 40 being Custom10 or whatever status value was given).

Since 'catiextendedstatus' exists as a default field it's not necessary to create a corresponding background variable (although you could if you want to make it available as a CATI filter). Now when sample is loaded you should find the records identified with '40' value should be automatically sent to the 'not scheduled' list and given extended status of 40.

It is also possible to automate this process by adding a filter to the scheduling rules. The following steps describe the set up process.

### Step 1

The first step is to create a background variable in the survey designer. In this example the question is named "Mode" and has answers "Web" and "CATI".

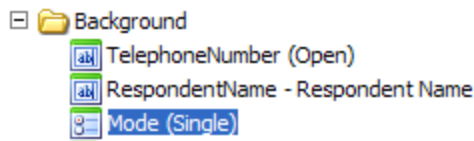


Figure 34 "Mode" background variable

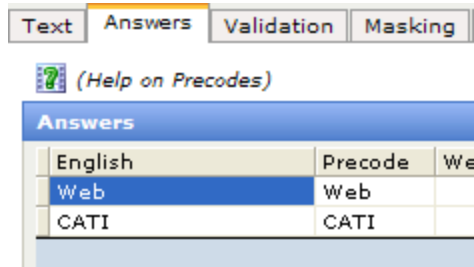


Figure 35 Create answer categories "Web" and "CATI"

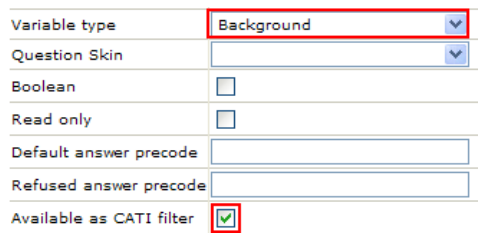


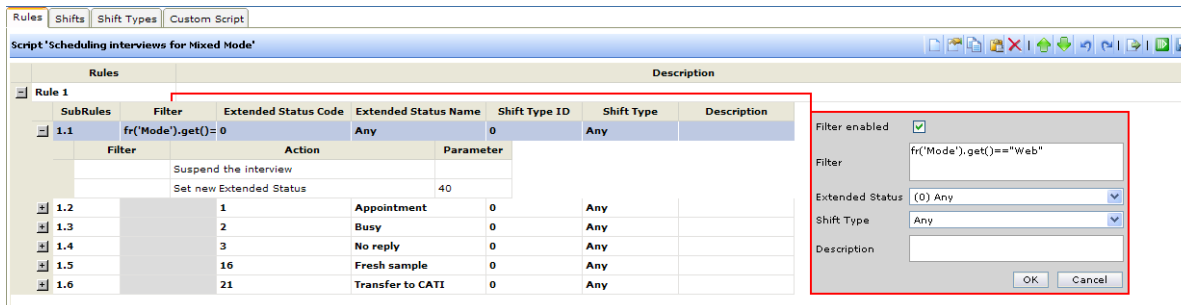
Figure 36 Set properties to "Background" and "Available as CATI filter"

The respondent sample file itself will need a "Mode" column containing "Web" for those records to be emailed rather than dialled and "CATI" for those that will be assigned and scheduled for CATI interviewing.

**Step 2**

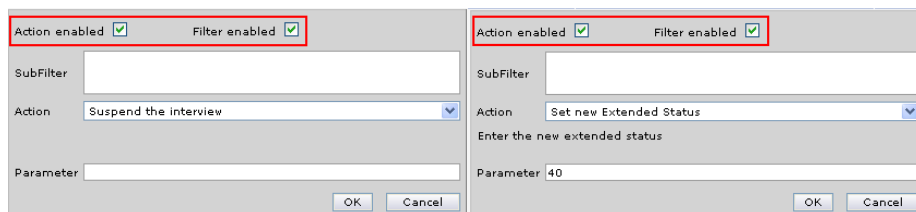
The next step is to create a new sub-rule in scheduling to filter the records intended for Web interviewing. The filter syntax is `fr('Mode').get()=="Web"`.

Create two new actions within the sub-rule, one to suspend the interview (so that Web records are not scheduled for CATI) and another to assign an extended status.

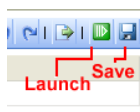


**Figure 37** Sub-rule actions to suspend the interview and apply a new extended status

Any actions contained within this sub-rule must have both the "Action enabled" and "Filter enabled" checkboxes ticked.



**Figure 38** Actions configured to be enabled with filtering turned on



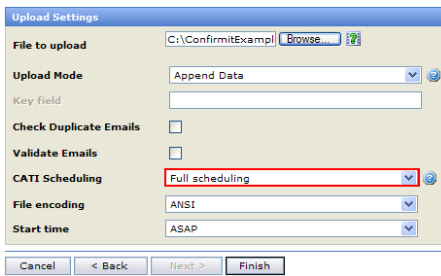
**Step 3**

Once the rules have been configured click on the save button. To make the changes active (for any survey projects currently using this set of scheduling rules) it is also necessary to click the launch button.

**Note:** The launch process will automatically save the scheduling rules in the current state.

**Step 4**

The final step is to load the respondent sample file, set the CATI scheduling option to "Full scheduling" so that the sample loading process runs through the scheduling rules that are assigned to the project.



**Figure 39 Load sample with “Full scheduling” selected**

After loading the sample check the Call Management window in the CATI supervisor console to ensure that the “Web” records are shown in the “Not Scheduled” list with the appropriate extended status.

## 23 Scheduling CATI Appointments from a CAWI Interview (Transferring from CAWI to CATI)

It may be desirable to have an interview which starts in CAWI but then transfers to CATI (capturing the essential caller information as it does so). In Confirmit version 17 a new function 'AddRespondentToCati(status)' can be used to create a call with corresponding Status, Respondent ID and Survey ID in CATI.

It takes one parameter 'Status' which is the ID of the CATI Extended Status (ID value '21' represents the standard Extended Status for calls transferred to CATI).


The function works only for surveys having CATI channel enabled, for respondents from added sample and only when interview is being passed in Web mode. Otherwise it is ignored.

For the added interview scheduling the procedure will be executed in accordance to the selected Extended Status and the call will be updated in CATI (Quota cells will be filled in usual way).

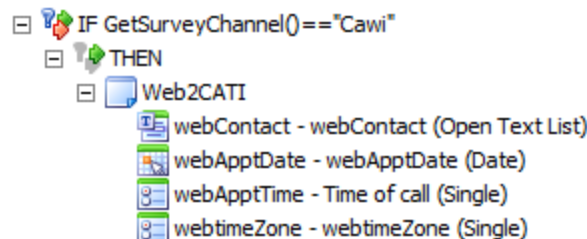
This example makes use of the AddRespondentToCati(21) function in order to create a CATI call with properties captured from a CAWI interview.

### Step 1

The first step is to add a series of questions in the CAWI interview in order to capture the required call properties like respondent name, telephone number, time zone and appointment date/time.

 **Important Note:**  
 This section of the survey must be defined in the Start Block to operate correctly. This is because since the interview will end on a question on the CAWI path the engine will not be able to locate a suitable position to resume the interview from when in CATI mode (this will likely result in an interview which simply skips to the end without displaying any interactive questions).

For example.



### Step 2

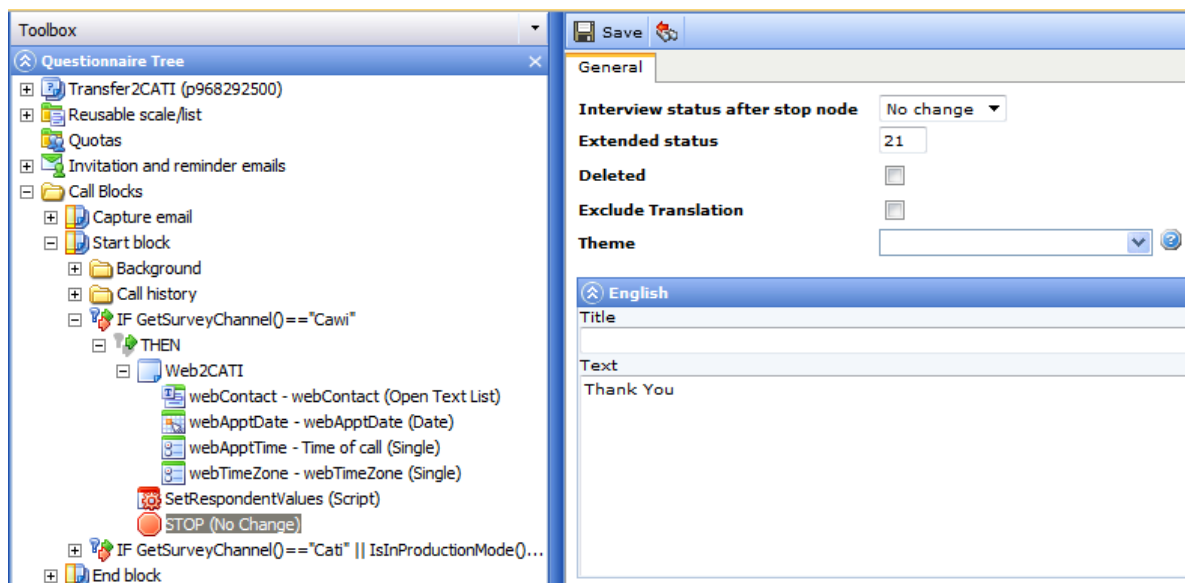
The second step is to insert a script node to set the values captured from the questions defined at step 1 into the standard background fields reserved for RespondentName, TelephoneNumber and TimeZoneId. This script is also used to create the call in CATI with the Extended Status value '21' (Transfer to CATI) using the AddRespondentToCati(21) function.

```

SetRespondentValue("RespondentName",f("webContact")["FN"])
SetRespondentValue("TelephoneNumber",f("webContact")["PH"])
SetRespondentValue("TimeZoneId",f("webTimeZone"))
AddRespondentToCati(21)
    
```

### Step 3

The next step is to place a stop node into the survey to suspend the interview and set the Extended Status to 21.



**Step 4**

It is then necessary to create or modify a scheduling script to handle calls created with 'Transfer to CATI' Extended Status. It is recommended to make a duplicate of the standard 'All hours' scheduling script and then to modify this duplicate. In this example the newly created script has been renamed to 'Transfer2CATI'.

The next modification to the new scheduling script is to add a Custom Script by simply paste the following code into the Custom Script tab and then click on the save icon.

This Custom Script will be used to set the appointment date and time for the call.

```
function CreateAppointment()
{
    var date : DateTime = DateTime.Parse( f('webApptDate').get() );
    var timeId : int = Int32.Parse( f('webApptTime').get() );
    var time : DateTime = date + ( TimeSpan.FromMinutes(30 * (timeId - 1) ) );
    var tzId : int = Scheduling.Interview.TimezoneID;

    var tzInfo = TimezoneService.GetTimezoneInfo(tzId);
    time = TimeZoneInfo.ConvertTimeToUtc(time, tzInfo);

    var appt = new BvAppointmentEntity()

    appt.ID = 0;
    appt.SurveySID = Scheduling.Interview.SurveySID;
    appt.InterviewSID = Scheduling.Interview.ID;
    appt.Time = time;
    appt.ExpTime = null;
    appt.State = 0;
```

```
appt.TZID = tzId;
```

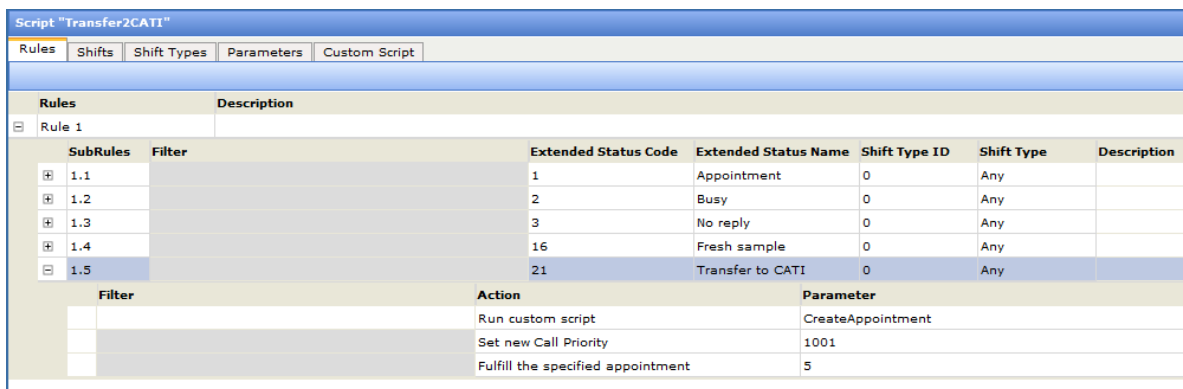
```
AppointmentRepository.InsertUpdate(appt);
}
```

**Step 5**

On the Rules tab add a new Sub Rule for the Extended Status 21 (Transfer to CATI). Then add the following three actions into the new Sub Rule.

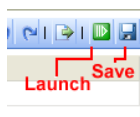
Action#	Action Enabled	Filter Enabled	Action Type	Value (Parameter)
1	Checked	Not Checked	Run custom script	CreateAppointment
2	Checked	Not Checked	Set new Call Priority	1001
3	Checked	Not Checked	Fulfill the specified appointment	5

The completed scheduling rule should look something like this.



**Step 6**

Once the rules have been configured click on the save button. To make the changes active (for any survey projects currently using this set of scheduling rules) it is also necessary to click the launch button.



**Note:** The launch process will automatically save the scheduling rules in the current state.

**Step 7**

The final step is to apply the new scheduling script to the appropriate survey (this is specified by using the 'Scheduling' drop down on the General tab for the given survey).

## 24 Restricting Call Attempts with Scheduling Parameters

It may be desirable to limit the number of call attempts. The Horizons CATI system has a built in function "CallAttemptCount" to record the number of call attempts a number has had. It is therefore possible to add a rule to the survey schedule so that the number of possible attempts will be limited (preventing further call attempts to be scheduled). This could simply be hard coded in the scheduling rule like this...

`GetRespondentValue('CallAttemptCount') > 5`

Or it could be parametrized so that a CATI Supervisor can more easily control the number of possible call attempts (by adjusting the parameter without the need to touch the schedule at all).

For example.

`GetRespondentValue('CallAttemptCount') > GetParamValue('maxcalls')`

Here is a step by step guide for implementation:

### Step 1

Go to Resources/Extended Status Codes and choose a suitable spare status that can be relabelled.

Tip: By modifying the 'Default group' this custom status could become a new default status for all surveys (assuming all surveys will stick with the Default group or a duplicate of it).

For example, here we have chosen the Custom1 status and renamed it to 'Too many tries'...

'Default group' extended status codes	
ID	Name
26	Interrupted by system
27	Filtered by call delivery
28	Stopped
29	Telephony failure
30	Error
31	Too many tries
32	Language difficulty
33	Soft Appointment
34	Custom4
35	Custom5
36	Custom6

### Step 2

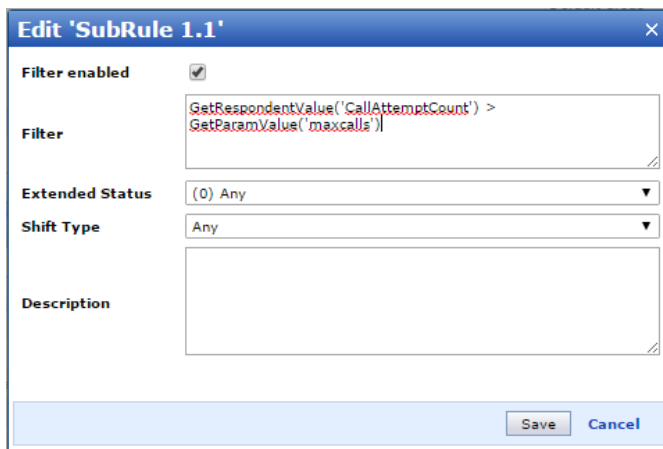
Now go to the Scheduling tab and choose the appropriate schedule to modify

Tip: The AllHours schedule is the default schedule applied to all surveys, so if this change is added to AllHours then it can be used in all surveys (assuming all surveys will stick with the default schedule or a duplicate of it).

Create a new subrule ticking 'Filter enabled' and then insert the following filter expression.

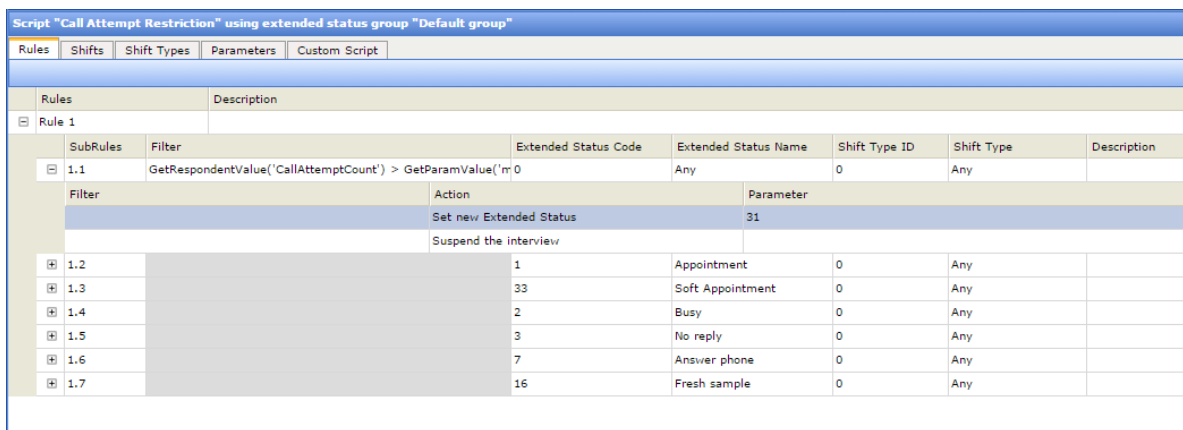
`GetRespondentValue('CallAttemptCount') > GetParamValue('maxcalls')`

Set the Extended Status to 'Any' and then move the rule up to the top of the rule list.



**Step 3**

Add an action to the subrule to set the extended status to 31 (or whatever status code was chosen in step 1) and another action to suspend the interview making sure that both actions have the tick boxes 'Action enabled' and 'Filter enabled' selected.



**Step 4**

The next step is to declare the parameter 'maxcalls'. To do this switch to the Parameters tab and then click on the button to add a new parameter. Set the name to 'maxcalls' (as used in this example) and enter a description that will make it obvious to the Supervisor what the parameter is for (e.g. Maximum number of tries). Set the type to numeric and enter a default value (this will be the default limit for call attempts in all surveys working from this schedule, unless overridden by the Supervisor).

**Edit Parameter**
✕

**Name**

**Description**

**Type**

**Default Value**

**Step 5**

Launch the scheduling script (this will automatically save the current changes and put them live).

**Note:** The call attempt restriction can now be adjusted (overridden) for any survey using the modified scheduling rules via the survey specific 'Scheduling Parameters' tab.

General	Summary	Assignments	Interviewer Search	Scheduling Parameters	Filters
Scheduling parameters can be optionally associated with the scheduling script.					
Scheduling Parameters List					
ID ▲	Name	Type	Value	Description	
2	maxcalls	Numeric	10	Maximum no of tries	

## 25 Automated Dialing

There are some further additional authoring components required when working with an automatic dialer.

There are some special functions for use with the dialer:

GetDialMode()

GetDialingMode()

These will cause the execution of the script to pause, waiting for the dialling to complete and return an indication of the outcome to the script so that suitable action may be taken.

GetDialMode() will get the value from the system variable whereas GetDialingMode() will get the value directly from the system engine.

It will return a numeric value corresponding to the list below.

- 1 = Manual
- 2 = Preview
- 3 = Automatic
- 4 = Predictive (not supported with the TCI dialer add on)

Similarly the dial mode can be set inside a script node in authoring as follows:

SetExtensionNumber(value)

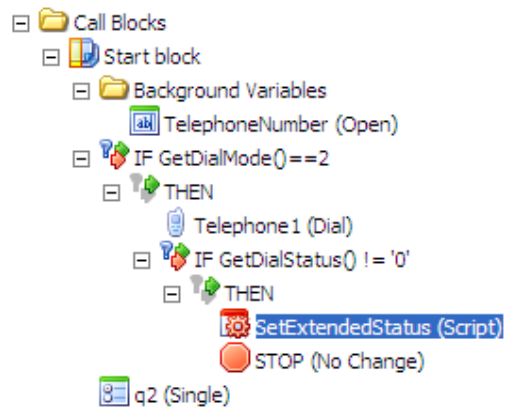
Where value is either 1, 2, 3 or 4 based on the list above.

GetDialStatus()

A function exists that returns the outcome of a dial attempt made by the dialler (when a company has the CATI telephony add on enabled). The GetDialStatus() function call will return a numeric value corresponding to the outcome list below.

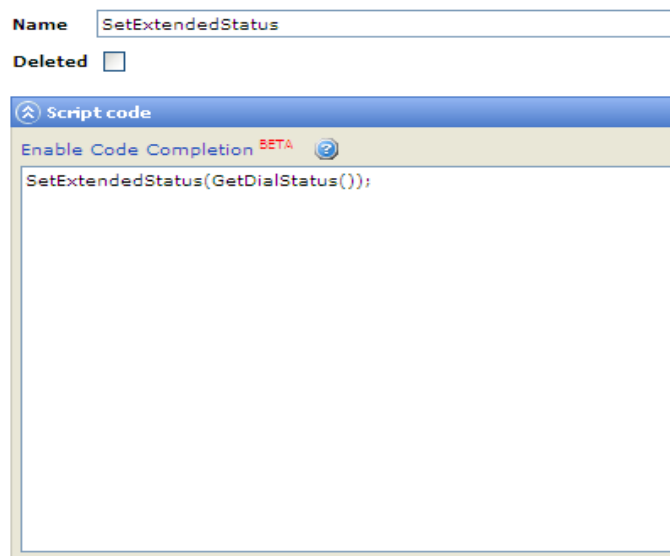
Dial status value	Description
0	Connected call
2	Busy
3	No reply
7	Answer phone
8	Modem
9	Fax
10	Congestion
11	Unobtainable
12	Nuisance
15	Returned not dialled
18	Not automatically dialled
25	Returned dialler expired
28	Stopped
29	Telephony failure
30	Error

Typically this would then be used to control either continuing the call or finishing the interview accordingly. As shown in the image below:



**Figure 40** Setting the Extended Status with the GetDialStatus function

With the script doing the following:



**Figure 41** Script to set the Extended Status based on the value returned by “GetDialStatus”


## 26 Hybrid Automated Dialing (Preview in Predictive mode)

In a predictive survey it's possible to set some calls to be dialed in Preview mode. This can be achieved in the following ways.


1. **Via sample** (using a column named 'DialMode'). This will assign the call to be dialled with the given mode. (e.g. 2 for Preview).
2. **Via scheduling** (using the action named 'Set dialing mode'). This action could be executed upon sample upload by loading sample with 'Full Scheduling' set.
3. **Via Call Management.** There is a column in the Call Management view labelled Dial Mode which can be used to search and filter calls. It is also possible to modify the value set for the dial mode by right clicking on the calls to bring up the context menu. The context menu provides the following options:
  - a. Set Preview Dialing Mode
  - b. Reset Dialing Mode
4. **Telephony Object**

This is a special item that can be inserted into the survey tree to initialise dialing or to hang up the call. The command has the following options:

**Dial** (place at the start of the interview to execute dialing the number contained in the specified telephone number background variable).

 **Note: When dialling is enabled for a project under 'Survey Settings/CATI Options' with the dial mode specified as 'Preview' it is also possible to display some information on the screen to the interviewer whilst the dialing takes place. Text (including piping) is entered into the 'Dialing text' box of the dial command.**

**Hang up** (place at the end of the main interview to end the call).

 **Note: Stop nodes will automatically execute a hang up operation and so there is no need to issue a hang up command wherever a Stop node is defined.**

## 27 Interview Voice Recording

When using an automatic dialer it is possible to create voice recordings (captured using the .wav file format). The recordings are stored on the physical dialer hardware\*.

\* With TCI the default path for recordings is:  
 C:\BellviewTCI\Interviews\\

**Note:** If there are multiple call attempts to the same number, each recording will be made in a separate file (a number is added to the end of the filename to signify the attempt number).

There is a CATI project level option that can be set to enable whole interview recordings. Recording will start each time the dialer begins to call a number and will stop each time the call is dropped (when the interview reaches a hangup command in the survey script).

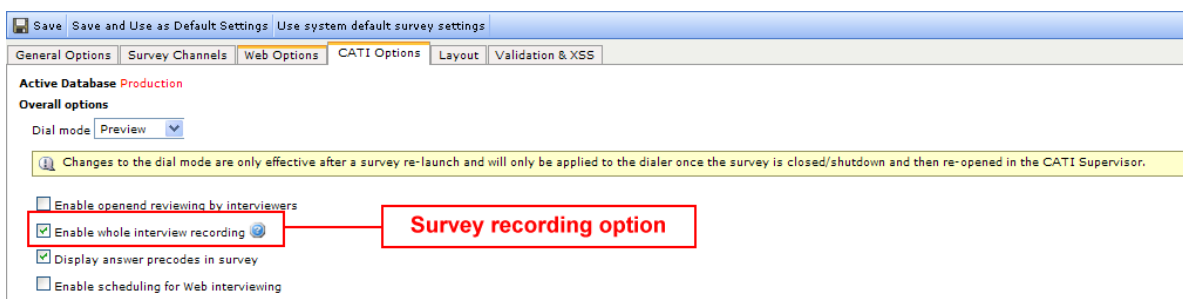


Figure 42 CATI Options tab: Enable whole interview recording

## 28 Sectional Voice Recording

It is possible to record sections of an interview. This is achieved by placing start and stop functions at the desired positions within the survey.

### StartVoiceRecording('label')

StartVoiceRecording is a function that may be called inside of a script node to begin a sectional recording. The recording will continue until either a StopVoiceRecording() function call is made or the interview reaches a hangup command.

When the StartVoiceRecording script is declared a label must also be included within parenthesis. The label specified is then incorporated into the name of the .wav file for the recorded section.

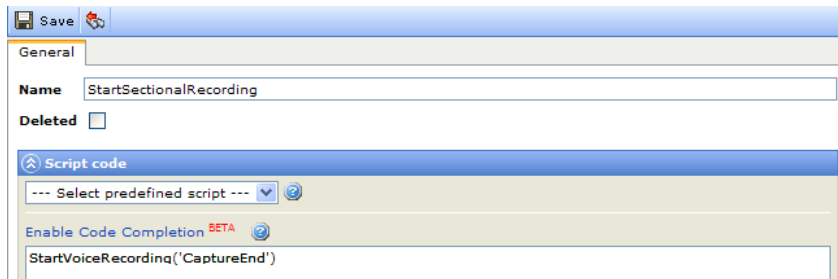


Figure 43 Script to call StartVoiceRecording function

### StopVoiceRecording()

StopVoiceRecording is a function that may be called inside of a script node to end either whole interview or sectional recording.

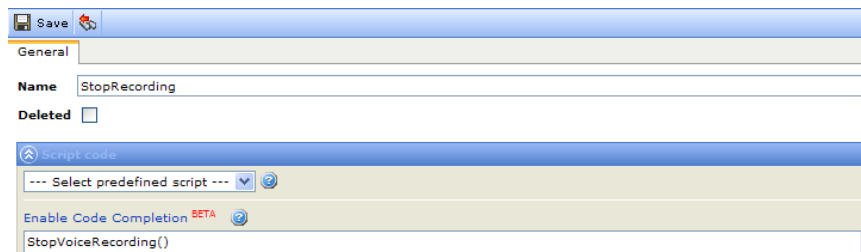


Figure 44 Script to call StopVoiceRecording function

Although it is necessary to supply a label when starting a new sectional recording, this is not required when stopping the sectional recording. Instead you just need to use the StopVoiceRecording command with one of the three following supported strings... "WholeInterview", "Sectional" or "Both" like this.

StopVoiceRecording('WholeInterview')

StopVoiceRecording('Sectional')

StopVoiceRecording('Both')

Note: These strings are not case sensitive.



**Note:** It is not always possible to have concurrent whole interview recordings and sectional recordings for the same interview, this functionality is supported by the Confirmit API (so it's down to the dialer vendor to make use of the capability). Neither the Confirmit TCI dialer nor the Marketing Systems Group, PRO-T-S® dialer currently support concurrent whole interview + sectional recording. If whole interview recording is enabled then a `StartVoiceRecording('label')` or `StopVoiceRecording()` function call will stop the whole interview recording at the point of execution.