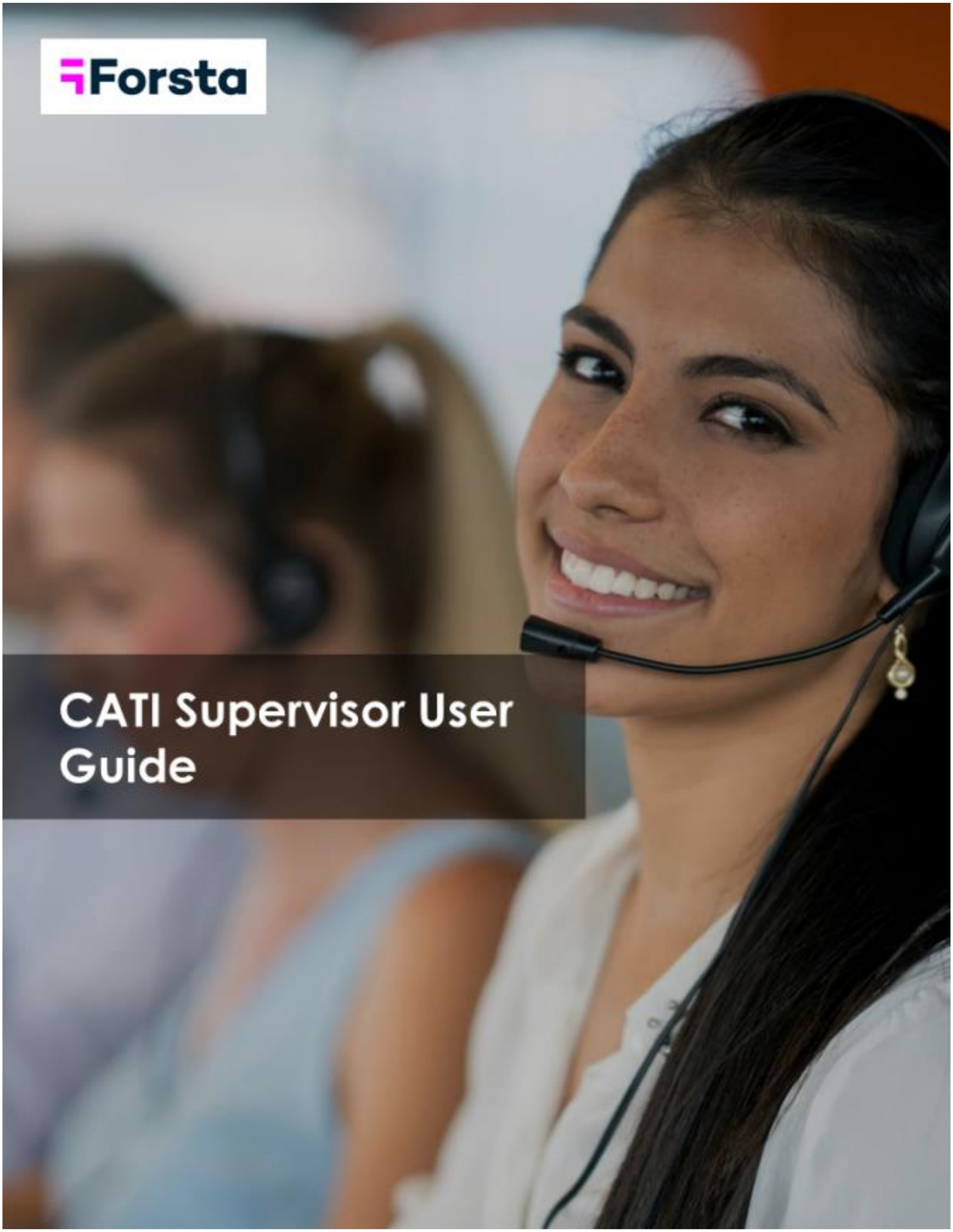


CATI Supervisor User Guide

Forsta Plus v2021

This is revision 2 of the Forsta Plus v2021 CATI Supervisor User Guide published in December 2021. The information herein describes Forsta Plus CATI Supervisor and its features as of Build nr. 2021.12.1536. New features may be introduced into the product after this date. Go to www.confirmit.com or check “News” on the Customer Extranet for the latest updates.

Table of Contents

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 Forsta Extranet at https://extranet.confirmit.com. Note that you will need to log in to the extranet to download this document.

The following changes have been made in revision 2 of the Forsta Plus v2021 CATI Supervisor User Guide:

- The company and product names are updated throughout the manual. Note that the images will be updated at a later date, and URLs, file names etc. will be updated as they become relevant.

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 revision are listed here - minor corrections to the text and document layout are not listed.

Important!
We need your feedback so we can improve this document and provide you with the information you require. If you have any comments or constructive criticism concerning the content or layout of this documentation, please send an email to documentation@forsta.com. Please include in your email the section number and/or heading text of the section to which your comment applies.

1. Getting Started with the CATI Supervisor

The CATI Supervisor module is a web-based application which you access through an internet browser. You can access CATI Supervisor both from the Internet and from within the Intranet. The CATI Supervisor interface is displayed in your browser window.

The CATI Supervisor module is accompanied by two tools:

- The CATI Interviewer Console - which is required for interviewers to conduct interviews.
- The CATI Monitoring Console - which is required to perform live monitoring of the interviewing process.

These tools are described in this user documentation.

This document is intended for users working in the CATI Supervisor system as supervisors.

1.1. The CATI Supervisor Prerequisites

Refer to the Forsta Plus v2021 System requirements document for a complete list of system requirements for the Forsta Plus software. A section of the document is dedicated to the CATI Supervisor module. You can download the document from the Forsta extranet - use your Extranet credentials to access this resource.

1.2. Logging In to Work with the CATI Supervisor Module

Start working with the CATI Supervisor module by logging into the system by:

- Clicking the CATI Supervisor icon from the **Global Navigation** menu, which is available in any Forsta Plus software. In this you will already have logged into the Forsta Plus software so you are only switching to working with the CATI Supervisor module.
- Using a link provided by a designated person, which will take you directly to the CATI Supervisor module. In this case you must enter your credentials to log into the CATI Supervisor module directly. When you click the link, the log in form opens.

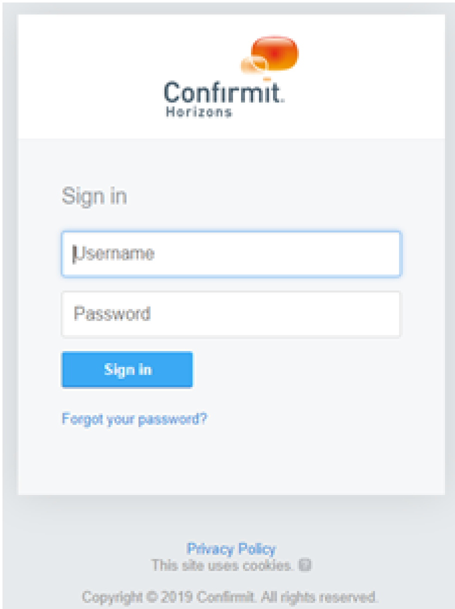


Figure 1 User login form

Enter your user name and password and click the **Sign in** button.

The CATI Supervisor module also provides the user with the possibility of switching to other Forsta Plus software applications via the **Global Navigation** Menu.

1.3. News Notifications

When you as a supervisor start the CATI Supervisor module for the first time, you may be presented with the news notifications window. For On-Demand users, notifications are published by Forsta. On-Premise users will only receive notifications that are published by the internal system administration team.

The news notification window presents useful information about new features, software usage tips, notifications about service outages, system maintenance or requirement changes related to the CATI Supervisor module.

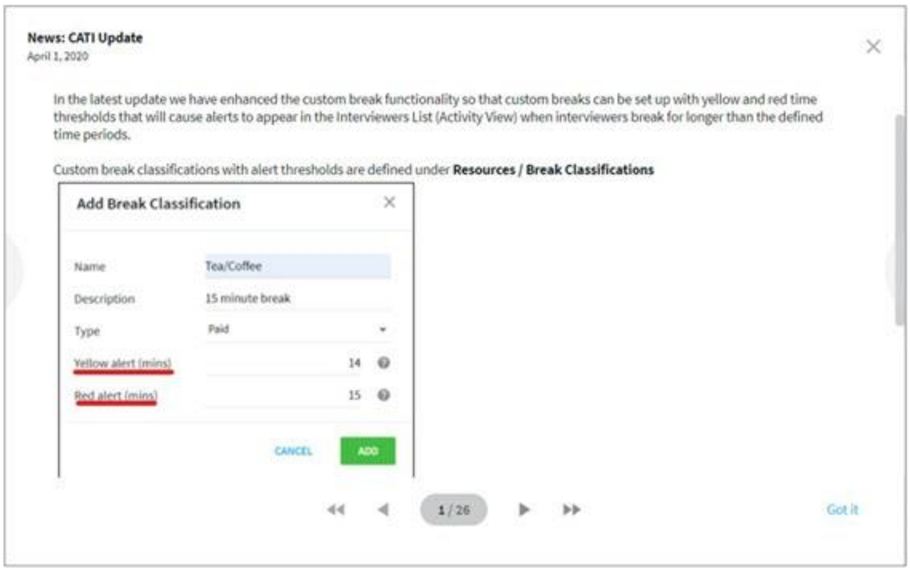
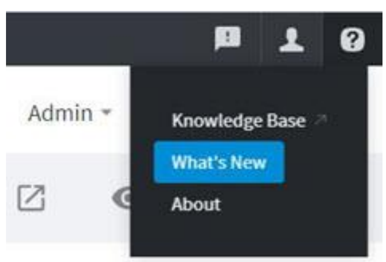


Figure 2 Example of the News window

To close the window and proceed to the CATI Supervisor module, click on either the **Got** it or **X** buttons in the News window. The news item will then not be displayed again the next time the user logs in. It is however possible to review all news items by choosing the **What's New** item from the help menu in the upper-right corner of the screen.



1.4. The Toolbar

The Forsta Toolbar is located in the header frame. It provides a link to the Forsta homepage, it allows the user to select some basic options related to the CATI Supervisor module, it simplifies navigation to other Forsta applications and it allows the user to manage their user settings. Similar toolbars are available with other Forsta applications.

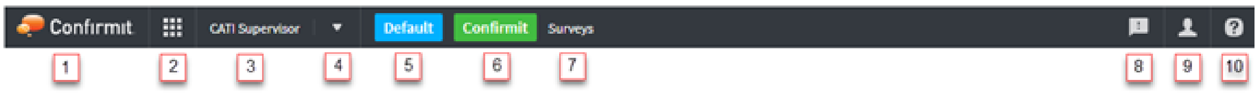


Figure 3 The Forsta toolbar

1. The Homepage link (The Forsta logo) - takes the user to the Home Page common to the majority of Forsta's applications. When you first log in to Forsta Plus this page opens, and it provides access to all the Forsta applications that you are licensed to use. The Home Page includes a list of Forsta applications which the user is licensed to access, a list of surveys which the user recently worked on and News Notifications (These are the news related to any Forsta application or application update).

2. The Global Navigation icon - is common to the majority of Forsta's applications. Click the icon to open a selection overlay providing access to all the other Forsta applications that you are licensed to use, and to the Forsta Plus Homepage. If you are logged in to Forsta Plus and you wish to change to a different application, click the icon and select the appropriate application. The current application is underlined and is also named in the toolbar (see item 3 below). If you are not licensed to use an application, its icon will not be displayed in the overlay.

3. The name of the Forsta Plus application the user is currently logged in to.

4. The drop-down list of Recent Surveys - these are the surveys which contain interviews that had their extended status changed recently (go to Changing the Survey in Call Management on page for more information). You can open a survey you select in this list in the View mode - the CATI Supervisor will display the list of surveys and the selected survey is then displayed in the bottom frame (go to Viewing and Modifying a Survey's General Properties on page 68 for more information).

5. The Call Center button - shows the name of the current call center. When clicked it opens the list of call centers.

6. The Company button - this button shows the name of the current company. When clicked, the button opens a drop-down list of companies to which the user can switch (that is, you can "jump" to working in a selected company)

7. The name of the CATI Supervisor section the user currently works with.

8. The User Feedback button - opens the User Feedback form which allows you to send feedback to Forsta.

9. The User Menu button - opens a sub-menu containing:

- The link that takes the user to the user profile page. The user profile is created on initial registration. It holds information about the user’s name, email address, preferred language, and a number of system settings. Each time you log in to Forsta Plus your profile will be accessed and the settings stored in your profile will be used to set up the system specifically for you. You can go into your profile at any time and edit the majority of the settings as you require;
- The Log Out link. This logs the user out of the CATI Supervisor system. If the user is logged in to other Forsta Plus products, they stay logged in to these products.

10. The Knowledge Base button - opens the CATI Supervisor Knowledge Base help system.

1.5. Main User Interface Elements

The topics linked below describe the main elements in the user interface.

1.5.1. The Navigation Menu

The Navigation menu is located under the Forsta Plus Toolbar (the header frame of the CATI Supervisor module window). The Navigation menu groups items according to their types. Some items in this menu directly display a grid populated with records.

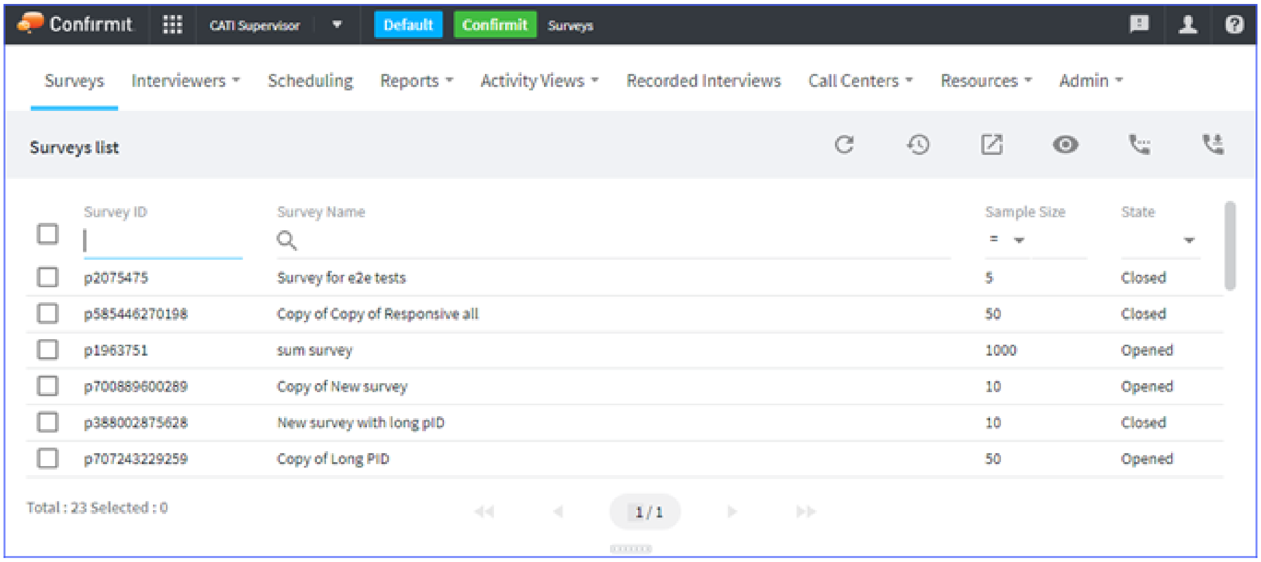


Figure 4 Choosing a Navigation Menu item displays a grid with a list of records

Some items in the menu unfold a sub-menu, and choosing an item in the sub-menu then displays a grid populated by records.

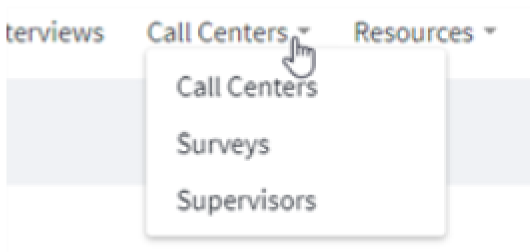


Figure 5 Choosing a Navigation menu item displays a sub-menu

Activity Views is a special case - the items in this sub-menu open views in separate windows. These menu items have the ↗ icon to indicate this.

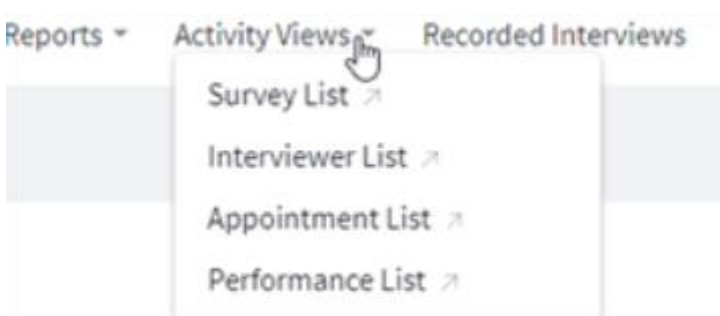


Figure 6 Activity Views are displayed in a separate window

1.5.2. The Surveys List

When you select an object in the Navigation menu which contains a list of records, this list appears in the workspace below the Navigation menu - see below. The name of the currently selected Navigation menu section is displayed in the header frame. The list of records is organized as a grid accompanied by an object-specific toolbar. Toolbar buttons provide for operations with listed records.

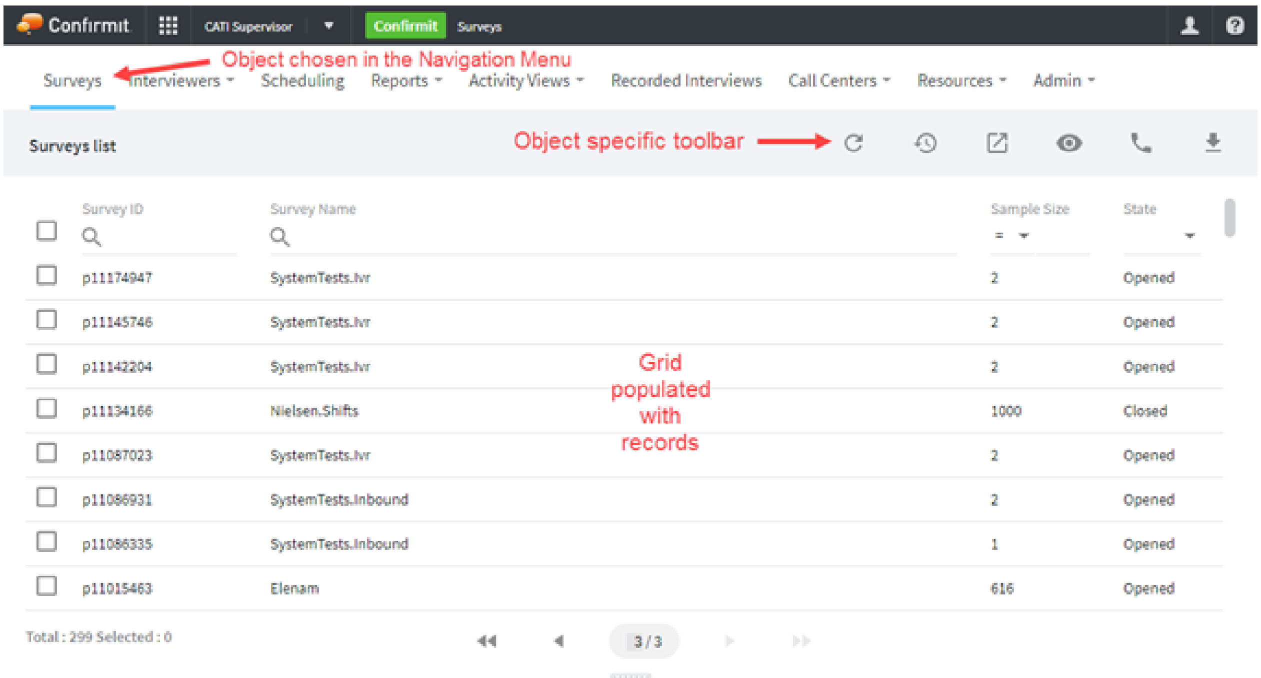


Figure 7 The list of survey records

The Top Frame will normally occupy the entire workspace. Some objects have editable properties. When you double-click a record in the grid, or choose the appropriate button on the toolbar, the properties of the selected object are displayed in a separate frame which appears below the grid - this is the Bottom Frame. Then the grid containing a list of records is displayed in the top frame and the properties of the selected record are displayed in the bottom frame as shown below.

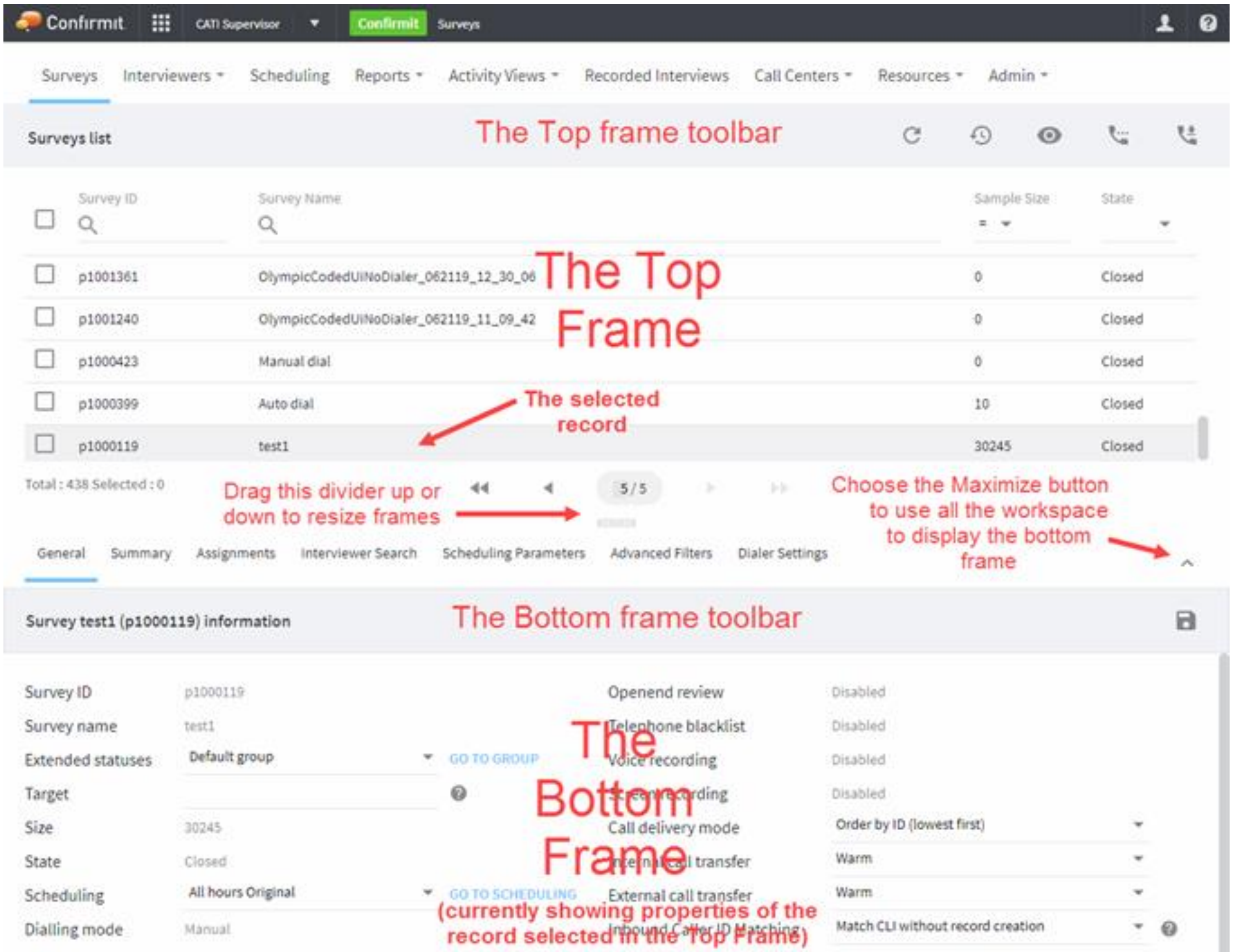


Figure 8 The list of survey records displayed in the top frame and properties of the selected survey displayed in the bottom frame

You can change the height of both frames by dragging the divider handle located between the frames. The bottom frame can be maximized to occupy the workspace completely; click the **Maximize** button. In the maximized position this button turns into the **Minimize** button; click this to return the bottom frame to its previous state.

The record list in the grid is refreshed automatically each time a new object is added to or deleted from the list. You can also click the **Refresh** button on the toolbar to refresh the list manually when required.

You can perform operations on a number of records in the grid simultaneously. Select objects by checking the appropriate boxes in the left column, clear all the selections by clicking the **Clear Selection** button on the toolbar.

The bottom frame always contains a toolbar which allows you to edit the currently displayed properties. If the bottom tab contains sub-tabs, each tab may have its own toolbar.

1.5.3. Browsing the Grid

The left part of the status bar in the top and bottom frames displays the total number of records and the number of currently selected records. The status bar also contains the grid browsing controls, and displays the page number of the currently viewed grid page and the total number of grid pages in the record list.

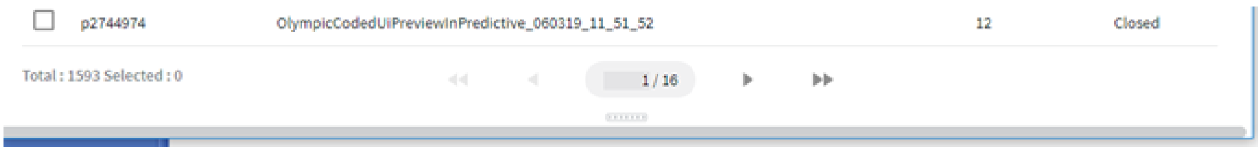


Figure 9 Status bar contains grid browse controls

Each grid can display no more than a predefined number of items at a time. In the majority of cases the list of records will exceed this number, so if a record you need is not visible in the current view (page) then you must browse the grid pages or use a search facility to locate it.

Browse the grid pages by switching to the next or previous page, jumping to the first or last page, or you can jump to a particular page; type its number in the Page Number field and press **Enter** on the keyboard.

1.5.4. Sorting Records in the List

You can sort the contents of any object list displayed in the grid. To sort the list by a column, click the column header. Each click toggles the column sorting between ascending and descending. The sorting order is indicated by an arrow icon displayed in the column header.

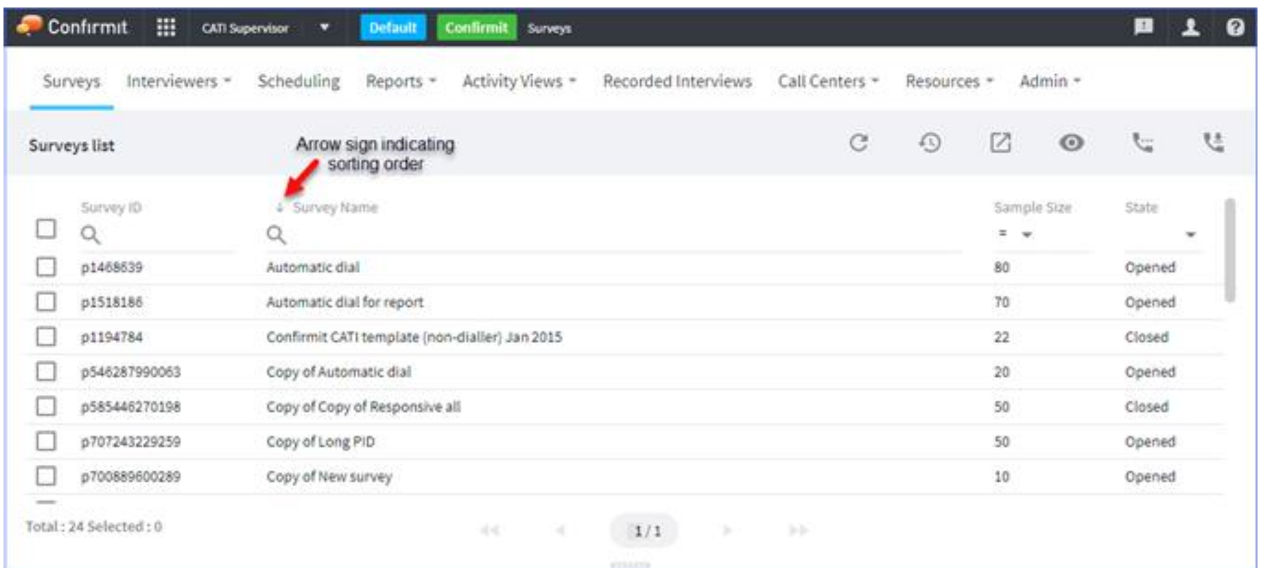


Figure 10 Survey list sorted by survey name

1.5.5. Searching for Records in the List

You can search the record list for particular records. To do this, apply a 'Quick filter' to one or a number of grid columns; only object(s) that match the filter criteria are listed. This search functionality is available in any grid in the CATI Supervisor user interface.

If the grid header row contains search strings and (optionally) drop-down lists, you can use these controls to apply one or more Quick filters simultaneously - see below.

The grid header row contains:

- The Search string - accepts typed characters.
- The Logical filter - allows choosing a logical filtering condition by selecting a logical operator and entering digits.
- The Value selection drop-down list - allows you to select a predefined value from the drop-down value list.

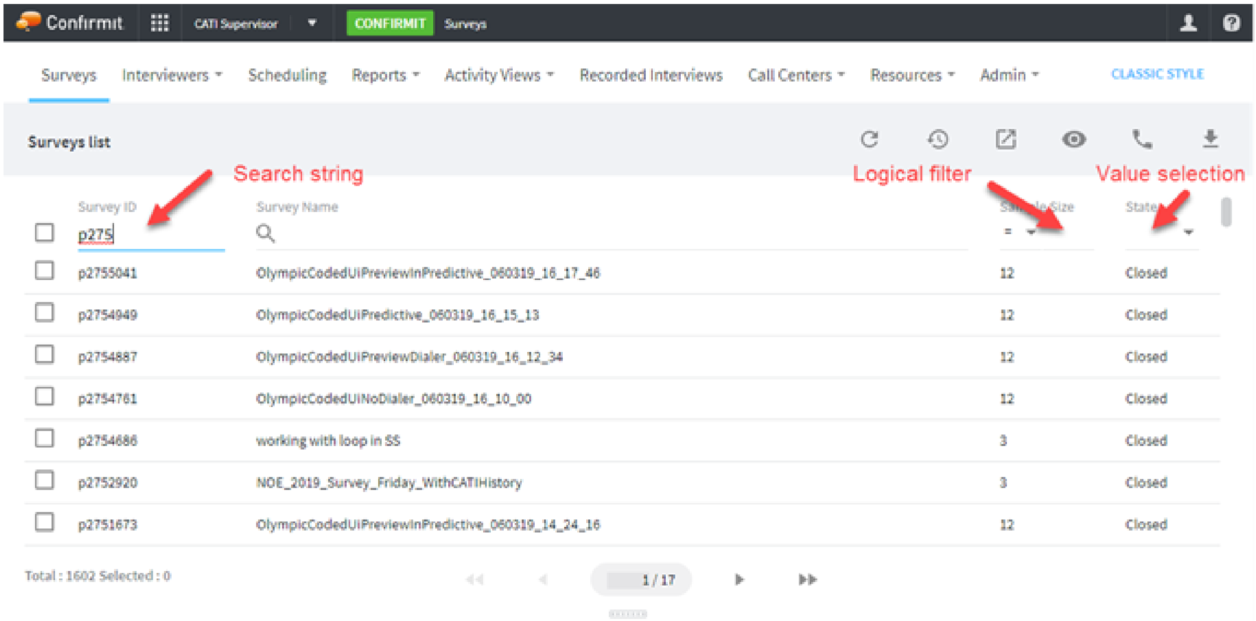


Figure 11 The search facility in the grid header row

- A search string can contain any symbol combination, including wildcards.
- You can apply any number of filters simultaneously in different columns. In this case filtering conditions will be combined using the AND logical operator.
- To apply a filter that you have typed into the search string, press **Enter** on the keyboard or click the **Refresh** button on the toolbar above the grid.
- A Quick filter chosen from a drop-down list will be applied immediately when you choose a value - the record list will be refreshed and show only records matching the Quick filter.

To remove a particular Quick filter:

- For the Search string - clear the field and press **Enter**.
- For the Logical filter - clear the value and choose the **equal** operator from the drop-down list;
- For the Value selection drop-down list - choose an empty value from the drop-down list.

Note that column sorting works on the filtered list (go to Sorting Records in the List on page 7 for more information).

1.5.6. Selecting Objects in the List

You create a selection of objects when you need to perform an operation on these objects. A selection can include a single object, a number of random objects on the current grid page, all objects on the current grid page, or the entire object list.

- Select a single object by highlighting the corresponding row in the grid (in the object list). There is no need to additionally check the box in the selected grid row.
- To select a number of random objects, check the boxes in the grid rows corresponding to these objects.
- To select all the objects currently displayed on the grid page, check the selection box in the header row. This will automatically check all the selection boxes inside the grid.

  Note that checking a box in the header row selects only the objects displayed on the current page of the grid. So if the object list comprises more than one page, objects on other pages will not be selected.

Note that any selections you make on a grid page are only valid while you stay on this page; if you move to another grid page, all selections made on the previous page are automatically cleared. In the event you need to perform operations on objects that are listed on different grid pages, you must make a selection on one page, perform the required operation for the selected objects, then move to another page and perform the required operation again.

To check if the object list occupies more than one grid page, look for the browsing controls located towards the bottom of the frame (go to Browsing the Grid on page 6 for more information).

The total number of objects included in the grid, and the number of objects currently selected, is shown in the lower-left corner of the frame (below the grid).

To deselect the selected object, clear the respective box.

When the box in the header row is checked and all objects on the current grid page are selected, deselect them all by un-checking this box in the header row.

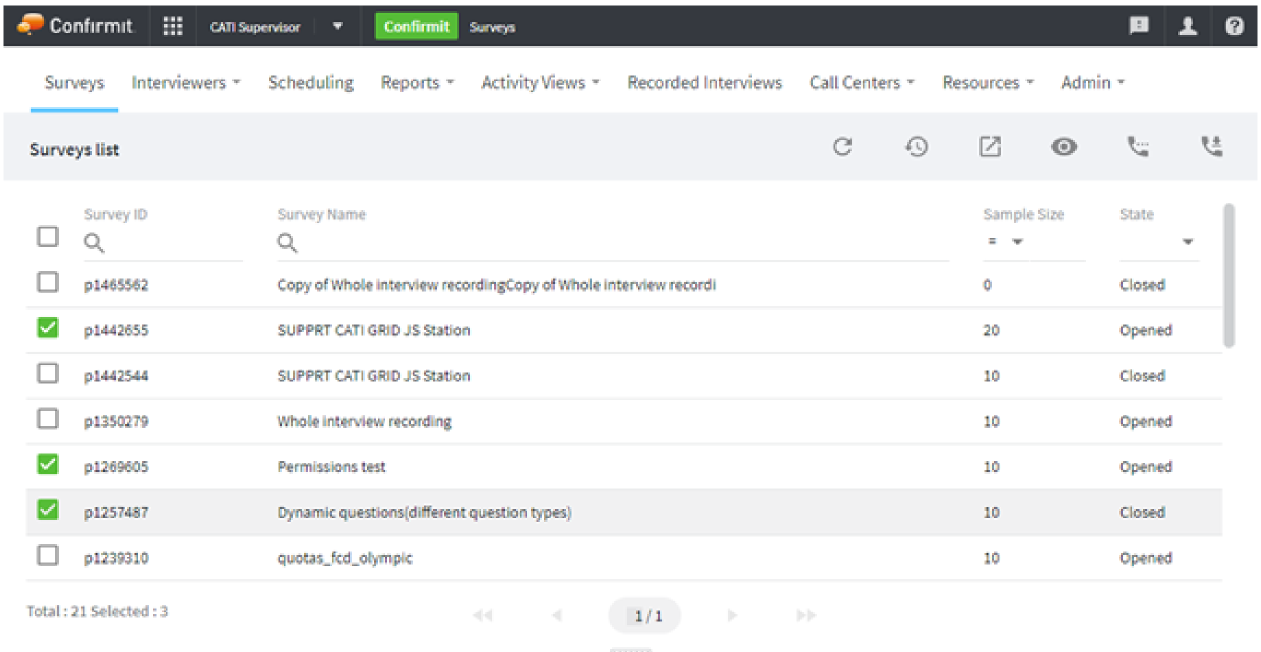


Figure 12 Three objects selected on a grid page

After you create a selection, you can apply an operation to the selected items. To do this you can either click a button on the title bar above the grid, or right-click any currently selected item and choose a command from the context menu.

Some context menu operations in the CATI Supervisor can be applied either to items which are currently selected in the grid, or to all objects currently included in the list. Ensure you choose the required option - see the instruction below for details.

To perform a context menu operation for the selected objects only, or for the entire list

1. Some context menu commands in CATI Supervisor are not performed immediately; they may reveal a sub-menu with the following choices:

- Selected objects.
- Entire list.

2. The "Selected objects" option can be used when you have created a selection on a grid page and need to perform an operation for this selection, or in the event you need to apply an operation to a single object which you have just right-clicked on to display the context menu.

3. In the event you need to apply a context menu command (perform an operation) to all objects that are currently included in the object list displayed in the grid, choose the "Entire List" option. This option allows an operation to be executed at once for all objects currently included in the list (for all objects listed on all grid pages).

   To execute a context menu command for the entire list you do not have to create any selection - only right-click any item in the list and choose the command from the context menu and then select the Entire List option from the sub-menu that appears. The command will be executed for the entire list even if any selection was already created (it will be ignored in this case).

Remember that the object list may not show all the available objects, such as when the list is filtered using the "searchable header" facility (go to Searching for Records in the List on page 7 for more information).

1.5.7. Object Properties View

The lower-right frame is used to display the properties and various configuration settings of an object selected in the grid in the upper-right frame. The appearance of the displayed parameter set is different for each selected object. The lower-right frame can use the tabbed interface, where some tabs are merely informational and some can contain editable settings.

The itle bar displays the current setting type and the name of the object and can also display a toolbar containing buttons appropriate to the currently displayed settings.

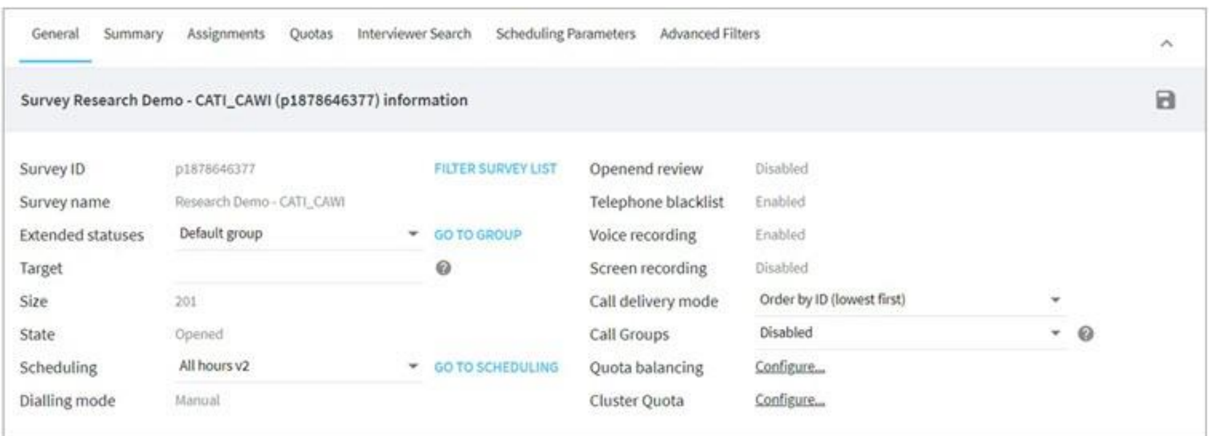


Figure 13 Contents of the bottom right frame - an example

In general the appearance and control elements used in the bottom right frame are similar to those used in the top right frame (go to The Surveys List on page 5 for more information).

If the bottom frame toolbar contains the **Save** button and you modify any setting on any tab in the lower frame, click **Save** to apply the changes. If you switch to view another object settings without saving the settings that you have modified, any changes will be discarded.

1.6. Providing Feedback

Any person logged in to the CATI Supervisor module can provide feedback on their experiences working with the software. This could be a suggestion for improvement, a bug report or suspected erroneous behavior.

To provide feedback, click the **Provide feedback** button  in the Forsta Plus toolbar (the header frame). This opens the Provide feedback page as shown below.

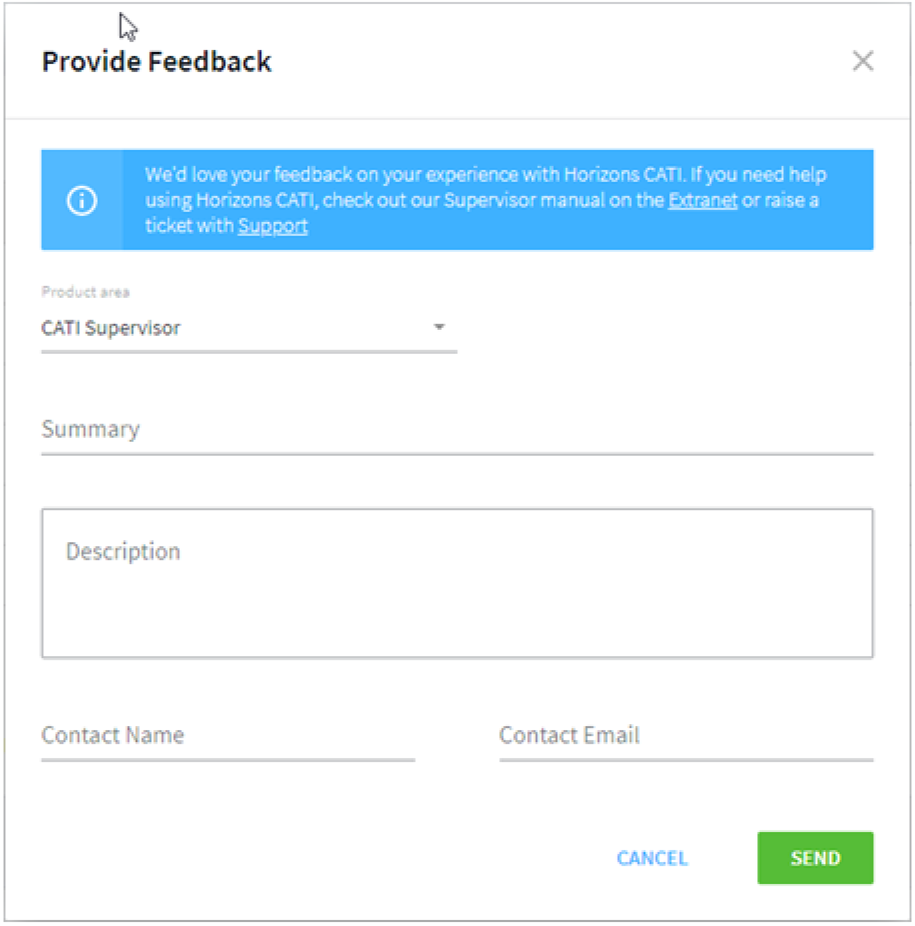


Figure 14 The Provide feedback dialog

The relevant product is already selected in the Product Area drop-down list. Fill in the rest of the fields and click **Send** to submit the Feedback form.

Note that you can access the CATI Supervisor User Guide directly from the application; click the **Help** button  in the header frame to open the manual.

2. Interviewer Management

All interviewers work under supervision. The supervisor specifies survey parameters, manages calls for each survey, adds and deletes interviewers and assigns them to certain tasks, and manages the interviewing process in general (go to Interviewer Management on page for more information).

To simplify management tasks the CATI Supervisor module allows interviewers to be separated into groups, as particular groups may be assigned to particular surveys (go to Managing Interviewer Groups on page 12 for more information). Interviewer groups are typically used to manage a set of users who share a common skill or attribute; for example interviewers who speak Spanish could be organized into a Spanish-speaking group.

To perform interviewer management, go to the **Navigation** menu and select the **Interviewers** item.

Both an interviewer and an interviewer group are configured with the help of the property set, which includes a name, group membership, survey assignment specification and other parameters. The supervisor specifies a password for any interviewer, which this interviewer should use when he/she logs into the CATI console to perform interviewing (go to Adding and Deleting an Interviewer on page 27 for more information).

2.1. Managing Interviewer Groups

When working with the Interviewer objects you can perform the following operations with interviewer groups:

- View the interviewer group list.
- Add and delete interviewer groups.
- View and modify interviewer group properties.
- Change the task choice.
- Send a message.

2.1.1. Viewing the Interviewer Group List

You can use the Interviewers tab to browse the interviewer group list.

To view the interviewer group list:

1. Open the **Interviewers** drop down list from the Navigation menu at the top of the screen.

   The option to open a list of interviewers or interviewer groups opens in the lower frame.

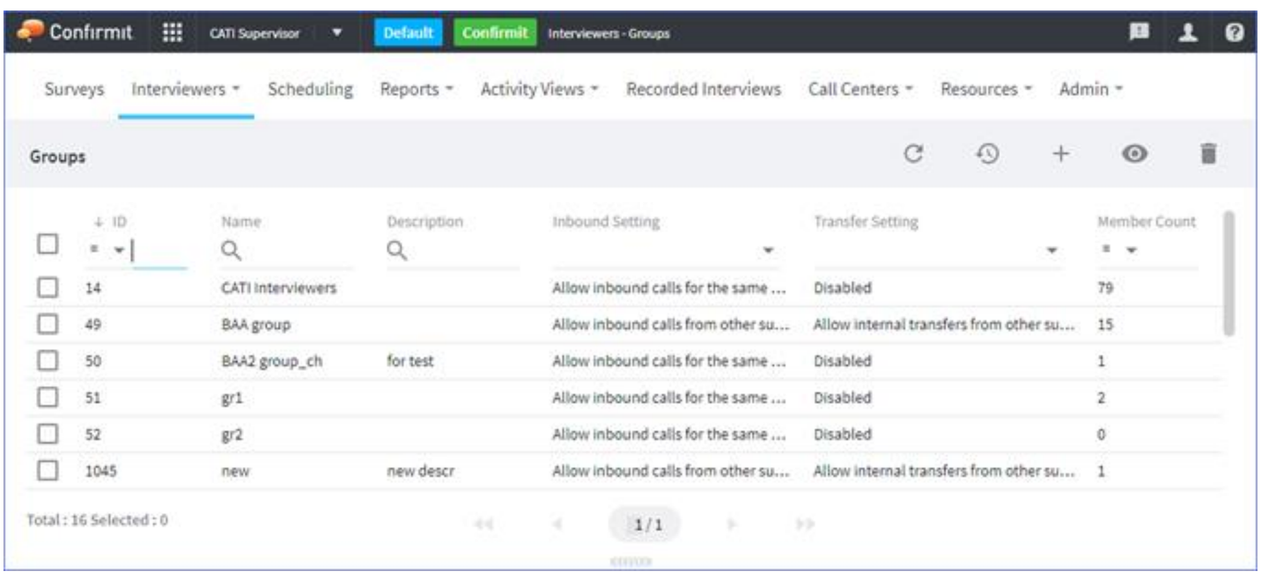


Figure 15 Viewing the interviewer group list in the top right frame

The Interviewer Group list provides the following information for each listed group:

- ID - Interviewer group ID provided by the system;
- Name - user-defined Interviewer group name;
- Description - optional description of the interviewer group provided by the user;
- Inbound Setting - a setting defining whether the group members are allowed to accept inbound calls;
- Transfer Setting - a setting defining whether the group members are allowed to accept call transfer;
- Member Count - shows how many members the group includes.

4. The user can perform the following operations with interviewer groups:

   - View and modify the interviewer group properties;
   - Add or delete interviewer groups;

   These operations can be performed with the interviewer groups displayed in the grid in the lower frame. Operations are performed by either choosing commands from the shortcut menu (activated by right-clicking the grid row containing the appropriate interviewer group), or by selecting a group and pressing buttons on the toolbar in the upper-right corner of the list frame.

5. When the lower frame displays the list of interviewer groups, its toolbar contains the following operational buttons.

Button	Description	Function
	REFRESH	Updates the interviewer group list
	CLEAR SELECTION	Deselects all currently selected interviewer groups at once
	ADD GROUP	Displays the Add Group dialog and allows a new interviewer group to be created
	EDIT GROUP	Displays the interviewer group properties in the bottom frame. You can edit these properties.
	DELETE	Deletes the selected interviewer group(s)

2.1.2. Adding and Deleting an Interviewer Group

Properties that are set up for a group are applied to all current members of the group.

To add a new interviewer group:

1. Right-click any row in the list, then either choose **Add Group** from the context menu or click the **Add Group** button in the toolbar in the top right frame.

   The Add Group dialog opens. Here you specify parameters for the interviewer group being created.

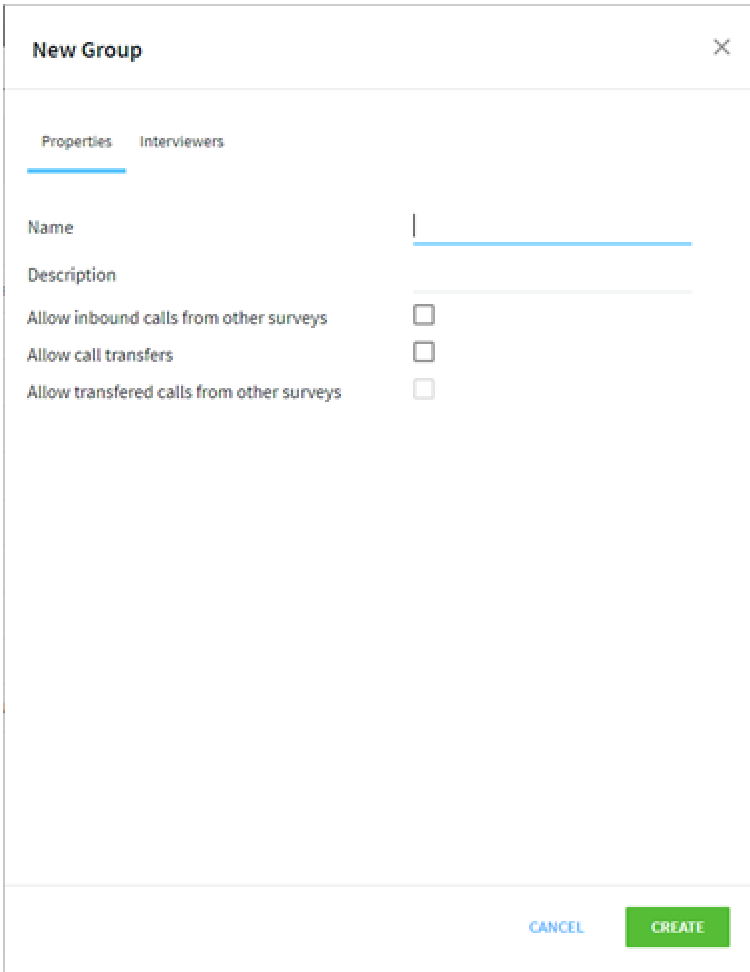


Figure 16 The New Group page - the Properties tab

On the Properties tab you enter the group name, description, and set up rules which define how call transfers are handled for the group members.

Call transfer functionality is enabled by a system setting (managed by a system administrator). The Properties tab provides options for managing inbound calls and call transfer. These options become available only when the appropriate setting is turned on in the CATI Supervisor System Settings.

Call transfer settings handle the following permissions for the group members:

- **Allow inbound call from other surveys** - this option allows all group members to receive inbound calls coming from other surveys (which the interviewer is not assigned to) (go to Inbound call handling on page 264 for more information);
- **Allow call transfers** - this option allows call transfers within a single survey (go to Performing Call Transfers on page 276 for more information);
- **Allow transferred calls from other surveys** - becomes available only when the "Allow call transfers" general permission is enabled. Allows the group members to receive transferred calls that come from a survey which is not assigned to them.

In the case of *A) an incoming call from another survey* and *B) a call being transferred from another survey* both surveys must be set up either in Predictive or in Non-predictive mode. When this requirement is not satisfied, any inbound call from another survey or any attempt to transfer a call will produce an error and fail.

The Interviewers tab contains a list of interviewers belonging to that group.

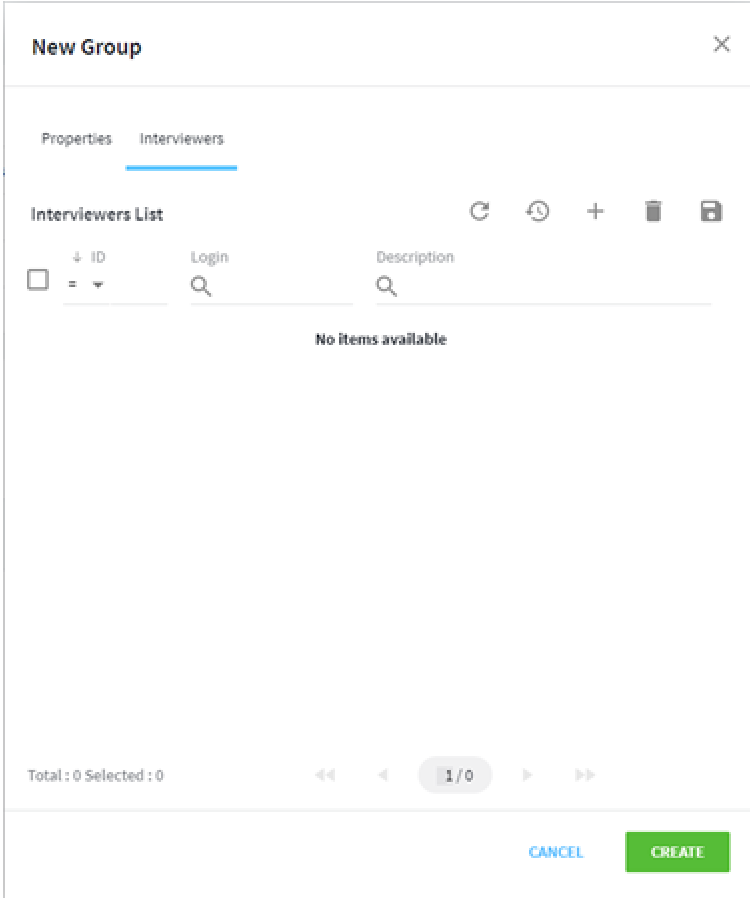


Figure 17 New Group page - Interviewers tab

This tab allows for interviewers to be added to or deleted from the current interviewer group.

4. To add an interviewer click the **Add Interviewer** button . If you have already added at least one interviewer and their name is shown in the list in the grid, you can instead right-click the interviewer row and choose **Add Interviewer** from the shortcut menu.

   The Add Interviewers page opens.

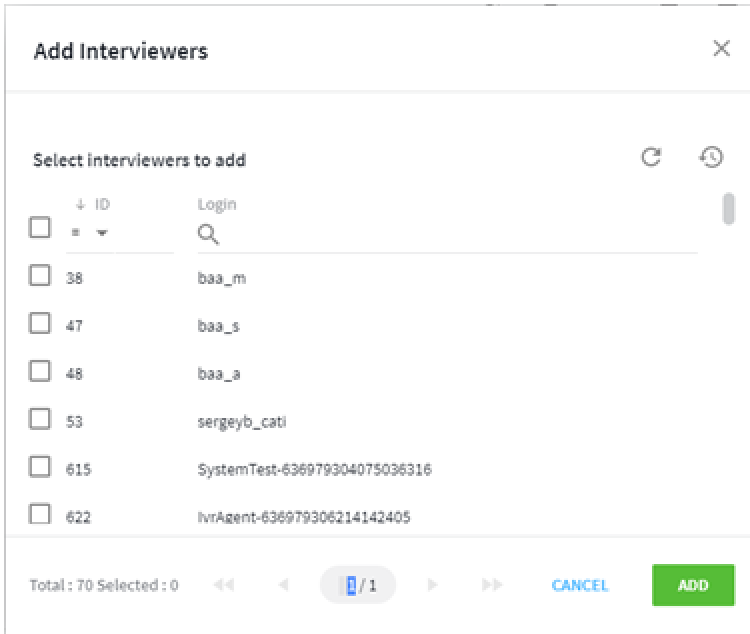


Figure 18 Selecting interviewers to add to the Interviewers tab

The list displays only interviewers that have already been added to the system. You cannot add new interviewers using this window interface – this can only be done via the New Interviewer dialog (go to Adding and Deleting an Interviewer on page 27 for more information).

5. Select the required interviewers by checking boxes in front of the interviewer names (or click the required items while pressing the **Ctrl** or **Shift** keys on the keyboard to create a multiple selection). You can manually refresh the interviewer list by pressing the **Refresh** button on this window toolbar, and you can clear the complete selection by pressing the **Clear Selection** button .

6. On completion click **OK**.

   The window closes and the selected interviewers are displayed in the grid in the Interviewers tab in the New Group window.

   Interviewers can be deleted from the list in the Interviewers tab. To do this select the required interviewers by checking boxes in front of their names in the list, and click the Delete button on the toolbar. Alternatively you can right-click any selected row and choose **Remove Interviewer** from the shortcut menu.

7. Finally, click **OK** to create a group with the specified properties.

   The New Group page closes and the group name appears in the list.

To delete an interviewer group:

1. Select one or more of the interviewer groups, by checking the boxes in front of the required groups in the list or by clicking the required items while holding down the **Ctrl** or **Shift** keys on the keyboard to create a multiple selection. Click the **Clear Selection** button to deselect any selected items.

2. To delete existing interviewer group(s) either:

   o Right-click any selected row in the list (in the top right frame), and choose **Delete** from the context menu, or

   o Click the **Delete** button in the toolbar in the top right frame.

   The confirmation dialog opens.

3. Click **Yes** to proceed with deletion.

Note: If you attempt to delete a group that was previously used to create a multiple assignment, the entire multiple assignment is deleted. In this case a warning message is presented (go to Multiple Group Assignments on page 147 for more information).

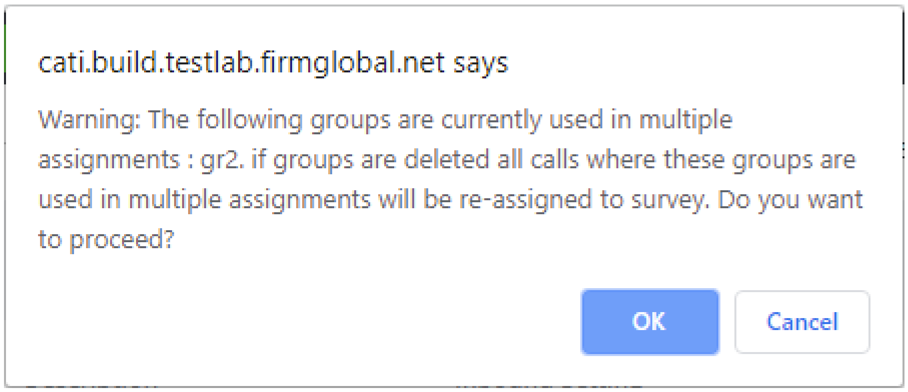


Figure 19 Message displayed when a group used in a multiple assignment is deleted

When a group that was used to specify the multiple assignment is deleted, the multiple assignment itself is also deleted. All calls that were assigned via this multiple assignment are re-assigned to the survey.

4. Click **OK** to delete the group and the multiple group assignment, or click **Cancel** to close the dialog without taking any action.

2.1.3. Viewing and Modifying the Interviewer Group Properties

You can modify at any time the properties specified when the group was created.

To modify the properties:

1. Double-click on the group row in the list or right-click the required row and choose **View** from the context menu, or select the row and click the **View** button  in the toolbar.

   The interviewer group properties dialog opens in the bottom frame. This frame uses tabs to display the group properties.

2. Go to these tabs to modify the current interviewer group's parameters.

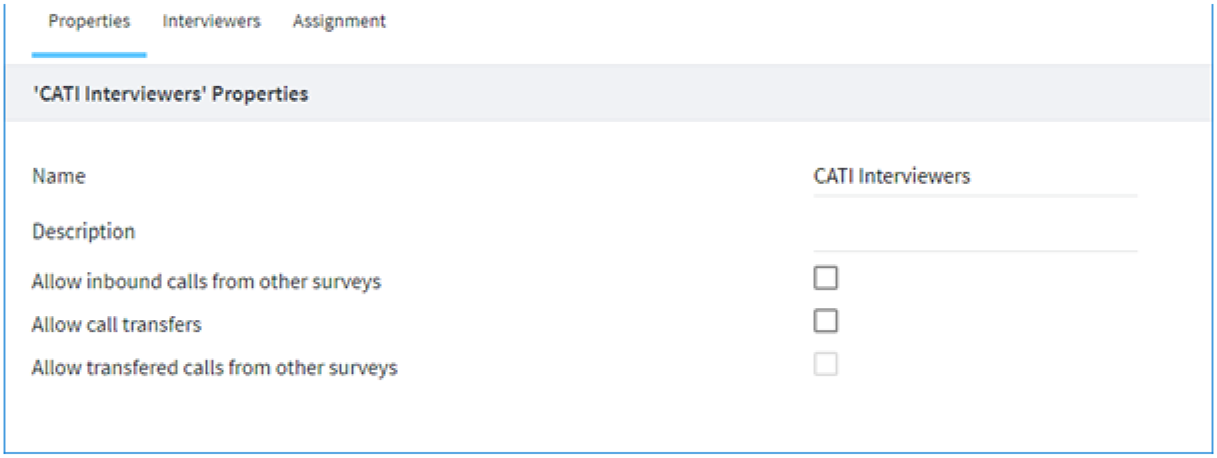


Figure 20 The Interviewer group properties > Properties tab

The controls on the Properties and Interviewers tabs are similar to those used with the New Group dialog (go to Adding and Deleting an Interviewer Group on page 13 for more information).

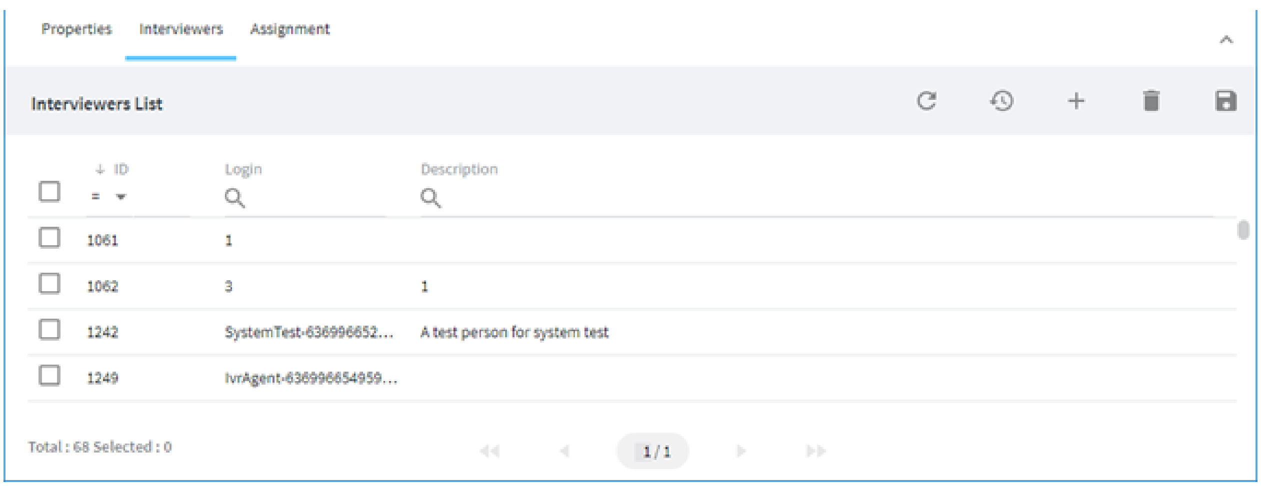


Figure 21 The Interviewer group properties > Interviewers tab

Note that the tabs in the Interviewer Group Properties view include the **Save** button on the toolbar. If you have made changes to any of the properties in the tab, the **Save** button will flash to prompt you to save those changes. If you do not save the changes they will be lost when you close the ...Properties view. If you attempt to leave a page containing unsaved changes, a warning message is displayed.

On the Assignment tab you can view, add, replace and delete (de-assign) survey assignments for the current interviewer group.

Note that this tab displays assignments only for the current group; this is NOT a combined list of all assignments that exist for the members of this group. To view assignments made for a particular interviewer, view this interviewer's properties (go to Viewing and Modifying the Interviewer Properties on page 38 for more information). To view assignments made for a nested interviewer group, view this group's properties.

Figure 22 The Interviewer group properties > Assignment tab

The list in this tab shows the following information for each assigned survey:

- The assigned project ID.
- The project name.
- The number of calls assigned for the group.

To assign new surveys to the group:

1. Click the **New** button on the toolbar or right-click any row and choose **New** from the shortcut menu.

   The Select Surveys to Assign dialog opens.

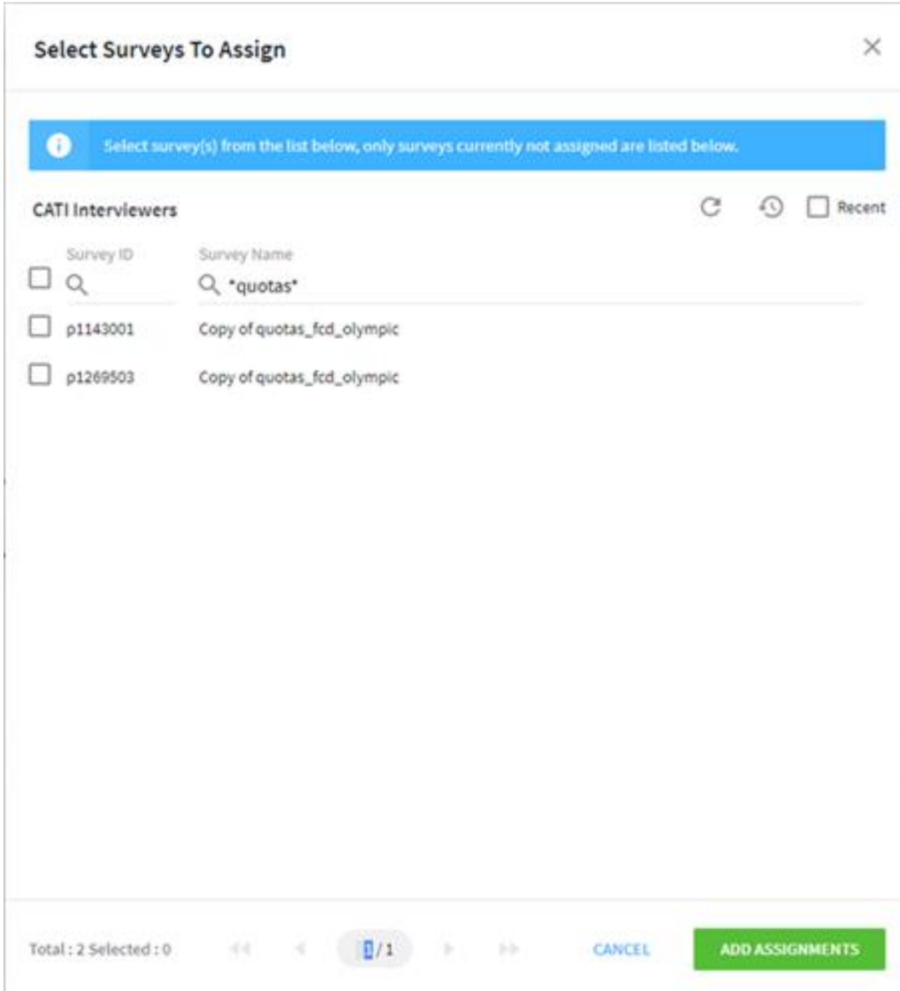


Figure 23 Selecting a survey to assign

2. Select the required surveys by checking the boxes by the survey names, or click the required items while holding down **Ctrl** or **Shift** keys on the keyboard to create a multiple selection.

- Click the **Refresh** button to manually refresh the survey list.
- Click the **Clear Selection** button to clear the selection.
- To simplify the survey selection process you can filter the list such that only "recent" surveys are listed. These are surveys that contain interviews that had their extended status changed recently. Check the **Recent** box to enable this filter (go to Changing the Survey in Call Management on page for more information).
- Choose a Dial Type from the drop-down box. This option allows numbers to be dialed while observing TCPA-compliance requirements (go to Dialing in the Single Survey TCPA Mode on page 357 for more information).

3. When you have selected the required surveys, click **Add Assignments**.

   The window closes and the selected surveys are displayed in the Assignments tab.

To replace any existing survey assignments for the current interviewer group:

Note that this action completely replaces all existing assignments with the currently selected ones. This action cannot be reverted.

1. Click the **Replace** button on the tab toolbar.

   The Select Surveys to Assign dialog opens.

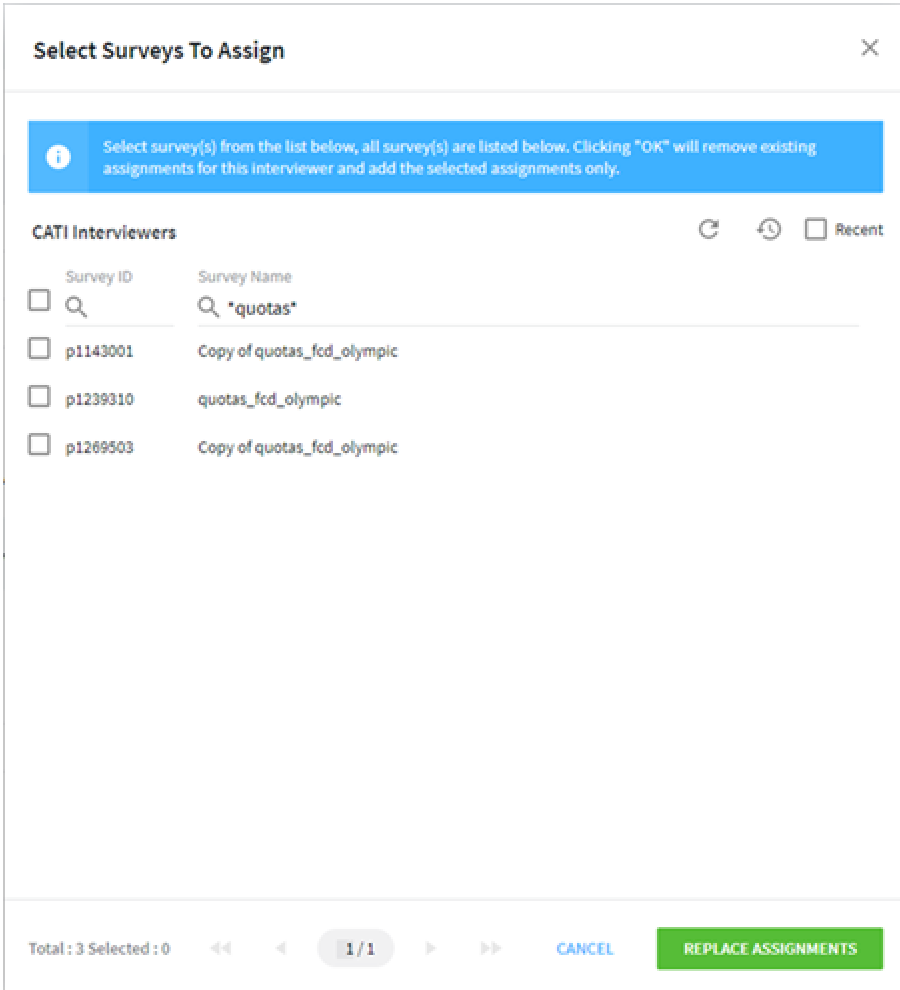


Figure 24 Selecting surveys to replace the existing assignment for an interviewer group

2. Select the required surveys by checking boxes in front of the survey names, or click the required items while holding down **Ctrl** or **Shift** keys on the keyboard to select multiple items.

- Click the **Refresh** button to manually refresh the survey list.
- Click the **Clear Selection** button to clear the selection.

3. When you have selected the required surveys click **Replace Assignments**.

   A message is displayed asking you to confirm the assignment replacement action.

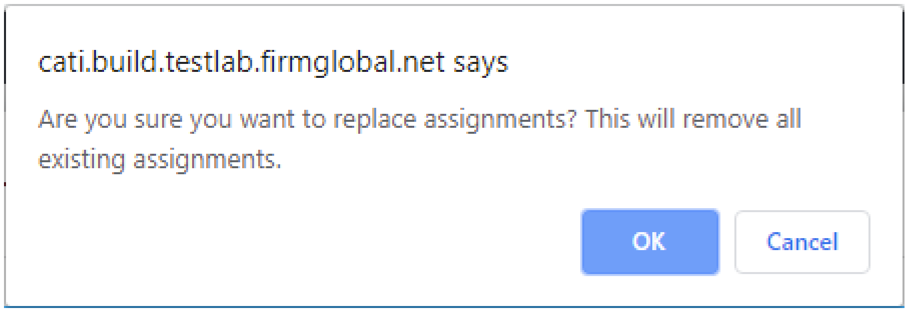


Figure 25 The replacement confirmation message

4. Click **OK** to confirm replacement.

   The specified assignment replaces the current assignment. This action cannot be reverted.

To de-assigned surveys (removed them from the list) in the Assignments tab:

1. Select the required surveys, by checking the boxes in the list or by clicking the required items while holding down the **Ctrl** or **Shift** keys on the keyboard to create a multiple selection.
2. Click the **De-assign** button on the tab toolbar.

   Alternatively you can right-click any selected row and choose **De-assign survey** from the shortcut menu.

   A confirmation dialog appears.
3. Click **Yes** to proceed with the de-assign action.
4. The frame is refreshed and the selected surveys are removed from the list.

2.1.4. Adding and Replacing Survey Assignments Directly from the Interviewer Group List

You can add and replace the existing assignments for any interviewer group selected in the interviewer group list. Note that both actions can be performed only for one interviewer group at a time, not for a multiple selection. To edit multiple groups, use the dedicated commands in the context menu.

The **Add...** command adds the selected surveys to the list of existing assignments, while the **Replace...** command removes ALL the existing assignments for the selected interviewer group and replaces them with the selected surveys.

To add a new survey assignment directly from the interviewer group list:

1. Display the required list of interviewer groups in the top right frame (go to Viewing the Interviewer Group List on page 12 for more information).
2. Right-click the required interviewer group in the list (multiple selection is not supported), and choose **Add assignment** from the context menu.

   The Add Assignment dialog opens.

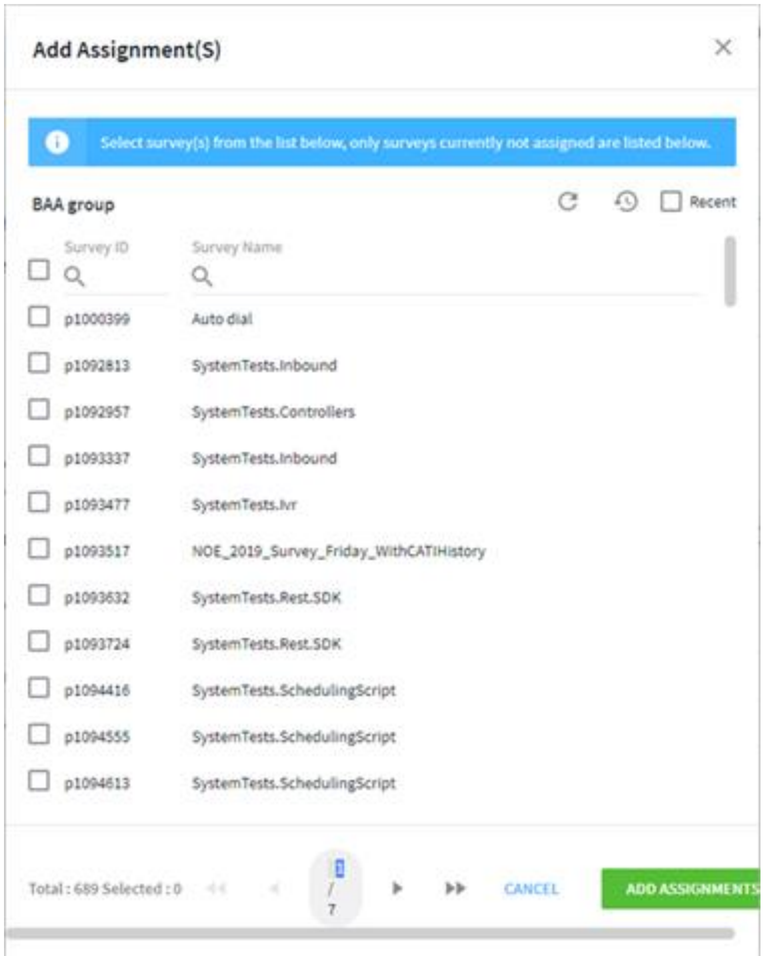


Figure 26 Selecting a survey in the Add Assignment dialog

Only surveys that are currently not assigned to the selected interviewer group are listed here.

3. Select the required survey (multiple selection is supported).
4. Click **Add Assignments** to confirm the selection.

   The Add Assignment dialog closes and the selected survey(s) are added to the list of existing assignments for the current interviewer group.

To replace an existing assignment directly from the interviewer group list:

1. Display the list of interviewer groups.
2. Right-click the required interviewer group in the list (multiple selection is not supported), and choose **Replace assignment** from the context menu.

   The Replace Assignment dialog opens.

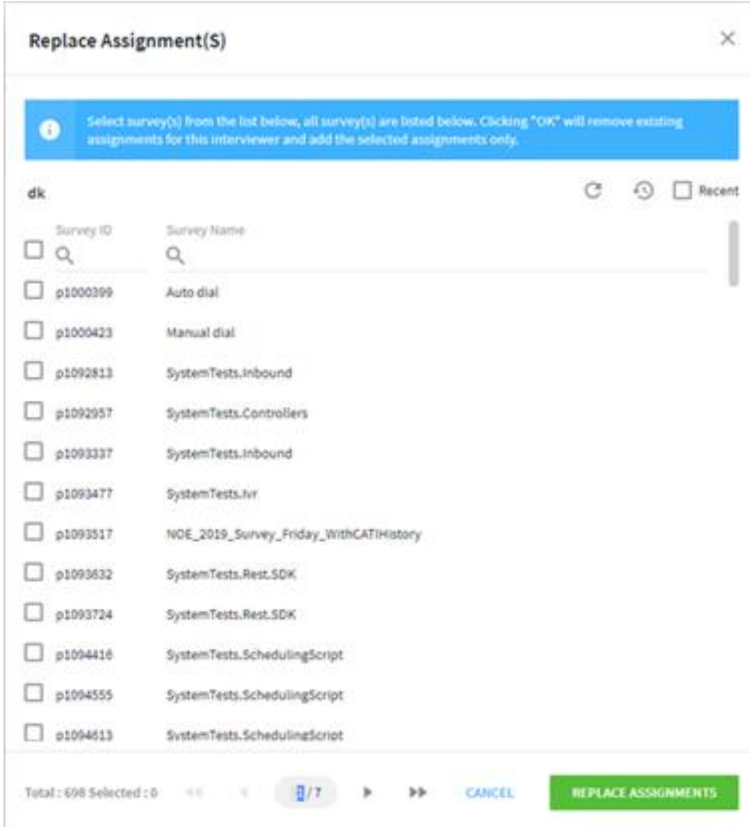


Figure 27 The Replace Assignment dialog

Only surveys that are currently not assigned to the selected interviewer group are listed in this window.

3. Select the required survey (multiple selection is supported) in the list in this window.
4. Click **Replace assignments** to confirm the selection.

   The Replace Assignment dialog closes and the selected survey(s) replace the list of existing assignments for the current interviewer group.

2.1.5. Changing the Interviewing Mode for the Interviewer Group

You can change the Interviewing mode for all interviewers who belong to one or more selected groups simultaneously. This action will set the same Interviewing mode for all interviewers belonging to the selected group(s). Note that in this case you are not changing the interviewer group properties; you are changing the properties of all the interviewers currently belonging to that group. The procedure is similar to that which is used to configure the Interviewing mode for a single interviewer.

To change the Interviewing mode for all interviewers belonging to one group:

1. In the interviewer group list, select one or more interviewer groups.
2. Right-click on the selected group(s), and choose **Change Task Choice** from the context menu that appears.

   The Select Interviewing Mode dialog opens. This dialog and the rest of the procedure is similar to that used to configure the Interviewing mode for a single interviewer (go to Changing the Interviewing Mode for an Interviewer on page 59 for more information).

2.2. Managing Interviewers

When working with the Interviewer object you can perform the following operations with interviewers/IVR agents:

- View the interviewer/IVR agent list (go to Viewing the Interviewer List on page 25 for more information).
- Add and delete interviewers/IVR agents (go to Adding and Deleting an Interviewer on page 27 for more information).
- View and modify interviewer/IVR agent properties (go to Viewing and Modifying the Interviewer Properties on page 38 for more information).

2.2.1. Viewing the Interviewer List

You can use the Interviewers tab to browse the interviewer/IVR (Interactive voice response) agent list. Note that you can browse a list and perform operations with either the "human" interviewers or with the virtual IVR agents, not both simultaneously - they are managed separately.

Note that the IVR agent list becomes accessible only if a corresponding option is enabled in the CATI Supervisor system settings. This setting is managed by your system administrator. When the option is turned on, the "IVR Agents" check box appears on the left side of the right frame toolbar.

The IVR functionality assumes interviews are conducted completely or partially without human agent interaction. In addition to "regular" interviewers, the supervisor creates and manages virtual “interviewers”, called "IVR agents", which conduct interviews (IVR agents are only used to register interviews that are managed by the CATI system). IVR is a technology that enables interviews to be conducted automatically when the system controls the interview progress and presents survey question text as audio recordings or robotic reading. Respondents are assumed to provide answers using DTMF (dual-tone multi-frequency) technology - by pressing suggested key combinations on their phones.

Refer to the "Setting up and conducting an IVR survey" topic in the CATI Administrators Manual for more information regarding IVR functionality in the CATI Supervisor module.

To view the interviewer list:

1. Open the Interviewers drop-down list in the Navigation menu and choose All Interviewers.

   The list of interviewers opens.

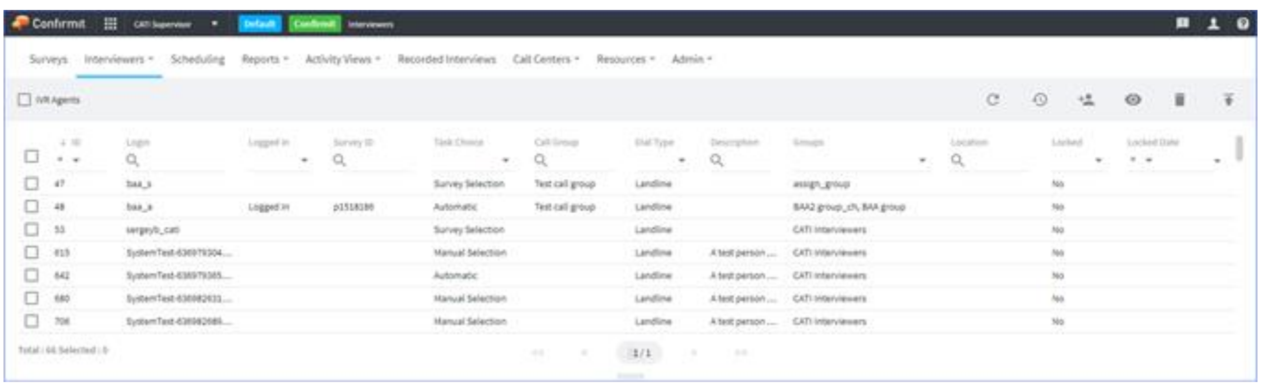


Figure 28 Viewing the interviewer list

2. If you need to work with the IVR agents check the IVR Agents box.

   Virtual IVR agents are shown and human agents are hidden. All operations that you perform with this option turned on are performed only on IVR agents - regular human interviewers cannot be managed in this state. To switch back to human interviewers, clear the IVR Agents box.

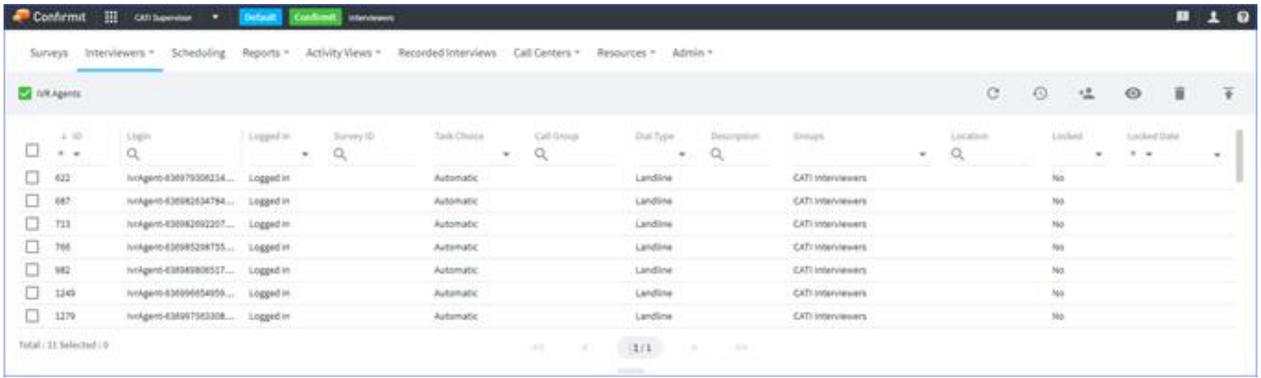


Figure 29 Viewing the list of IVR agents

You can perform the following operations with interviewers/IVR agents:

- View and modify the interviewer/IVR agents properties.
- Add or delete interviewers/IVR agents.
- Import the list of interviewers from a file.

  These operations can be performed while the interviewer or the IVR agents list is displayed in the grid in the top right frame. Operations are performed by either choosing commands from the shortcut menu (right-click the row containing the appropriate interviewer description), or by selecting a row in the grid and pressing buttons on the toolbar in the top right frame.

  When the lower frame displays the list of interviewers, its toolbar contains the following object-specific button set.

Button	Description	Function
	REFRESH	Updates the interviewer/IVR agent list
	CLEAR SELECTION	Deselects all currently selected interviewers/IVR agents
	NEW INTERVIEWER	Displays the Add Interviewer dialog and allows a new interviewer to be created (depending on the IVR functionality setting - if this is turned on, a new IVR agent is created)
	PROPERTIES	Displays the interviewer/IVR agent properties in the bottom right frame. You can edit these properties.
	DELETE	Deletes the selected interviewers/IVR agents
	IMPORT	Allows the list of interviewers to be imported from an MS Excel file

2.2.2. Adding and Deleting an Interviewer

To add a new interviewer:

1. Open the list of interviewers (go to Viewing the Interviewer List on page 25 for more information).
2. Right-click any row in the interviewer list and choose **New** from the context menu, or click the **New Interviewer** button  on the toolbar in the top frame.

   The New Interviewer dialog opens. Here you can specify properties for the interviewer being created.

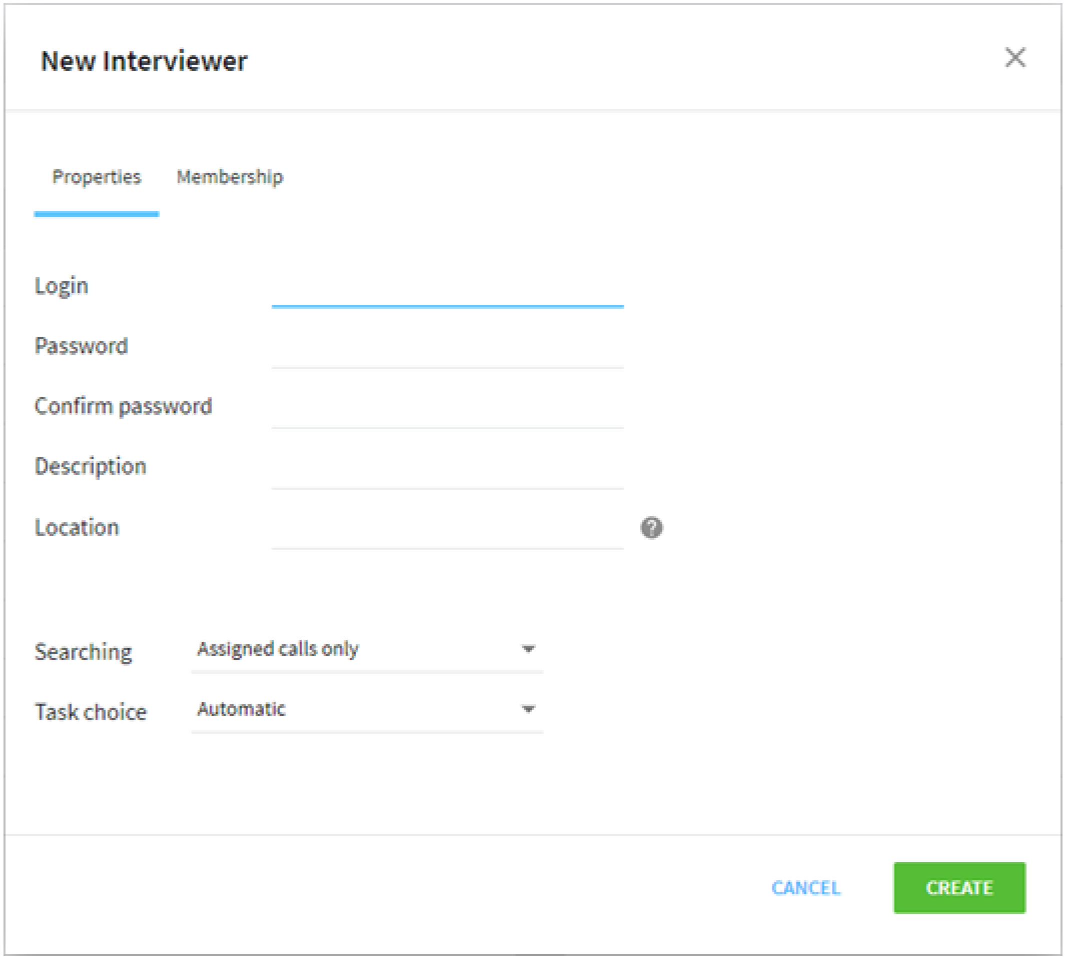


Figure 30 The New Interviewer dialog > Properties tab

3. Fill in the mandatory fields. Enter user credentials in the Login and Password fields, then reenter the password in the Confirm password field. Other fields are optional; these can be edited at any time.

Note: Forsta recommends you consider the security policy that is applied for all CATI Interviewers. Login settings such as the enforcement of complex passwords can be configured by a CATI administrator under Admin > Settings > Security.

CATI Interviewers can be assigned a free-text Location attribute. This attribute is passed to a connected dialer and used to identify the location of the interview to the dialer. The assigned value is visible in the interview list in the Location column and can be used for filtering. The Location attribute is optional.

Only valid location names (as specified in the dialer gateway configuration settings) may be used here (go to Changing a Location for an Interviewer on page 62 for more information). Leave the location field blank unless locations have been predefined by the system administrator.

An interviewer can be allowed to bypass explicit call assignment. In this case if the interviewer is assigned to particular calls and not to a whole survey, they would still be able to see and work with all calls that exist for this survey.

Such a "bypass permission" is valid only for interviewers working in the Manual Interviewing mode or if the Manual Interviewing mode is selected under the Choice Interviewing mode (go to The Interviewing mode for an interviewer on page 28 for more information). If the interviewer works in an Interviewing mode other than Manual, the "bypass permission" has no effect on the way the calls are delivered to that interviewer.

To configure the "bypass permission" choose an option from the Searching drop-down list. The options are "Assigned calls only" and "All calls".

o"Assigned calls only" is the default value. This option specifies that the interviewer will work in a regular way - they will see only calls that are explicitly assigned to them.

oThe "All calls" option makes all calls assigned to all interviewers available to that particular interviewer regardless of what calls they are explicitly assigned to.

4. The Call Groups option allow you to apply custom call delivery rules by choosing from a number of pre-configured call sets (go to Configuring the Call Groups on page 341 for more information). This option is enabled and disabled by the system administrator, this facility is not available through the regular CATI Supervisor module interface.

   A Call Group can also be changed using a corresponding command in the shortcut menu in the Interviewer List (go to Changing a Call Group for an Interviewer on page 63 for more information).

   Note that the Call Group option can be applied to the interviewers who are assigned for working in the Survey Selection Interviewing mode only.

Dial Type in the TCPA Compliance mode

8. When the TCPA compliance mode is enabled for the company, the Dial Type setting becomes available in the New Interviewer window. Each interviewer is assigned a certain **Dial Type**: they can either be assigned the “Landline”, or the "Cellphone" dial type. The “Landline” dial type assumes the phone numbers are dialed both manually and automatically, while the “Cellphone” dial type assumes the phone numbers can be dialed only manually. Select the Dial Type from the Dial Type drop-down box.

   Refer to (go to Dialing in the Single Survey TCPA Mode on page 357 for more information) for information regarding the TCPA compliance mode.

10. The Task Choice field allows the supervisor to set the call delivery mode for this interviewer – it can either be Manual, Automatic or Survey Selection.

The Interviewing mode for an interviewer

Manual: On logging in the interviewer is taken to a landing page where they may select both a survey and a call to work with. After each interview is completed the interviewer is returned to the landing page where they may choose another survey or call.

Automatic: On logging in the interviewer is automatically given a call from the call list to work with. Calls from any survey that is open and to which the interviewer is assigned may be delivered. The system decides which survey the interviewer is to work with based on call priority settings and scheduling rules. Another call will be delivered automatically each time an interview is completed.

Survey Selection: On logging in the interviewer is taken to a landing page where they can choose a survey to work with. Once a survey has been selected, the system will begin to deliver calls automatically for that survey. The interviewer will only be delivered calls for their chosen survey even though several other surveys may be available. Calls will be delivered for the chosen survey until the interviewer logs out.

Choice: On logging in, a dialog appears, and the interviewer must choose the Interviewing mode from a drop-down list on the dialog. The list of modes is assigned to the interviewer by the supervisor.

If the supervisor assigns the **Choice** option, all three mode types appear below the field followed by check-boxes. Interviewing modes with the tick inside the box will be available for the interviewer when they log in.

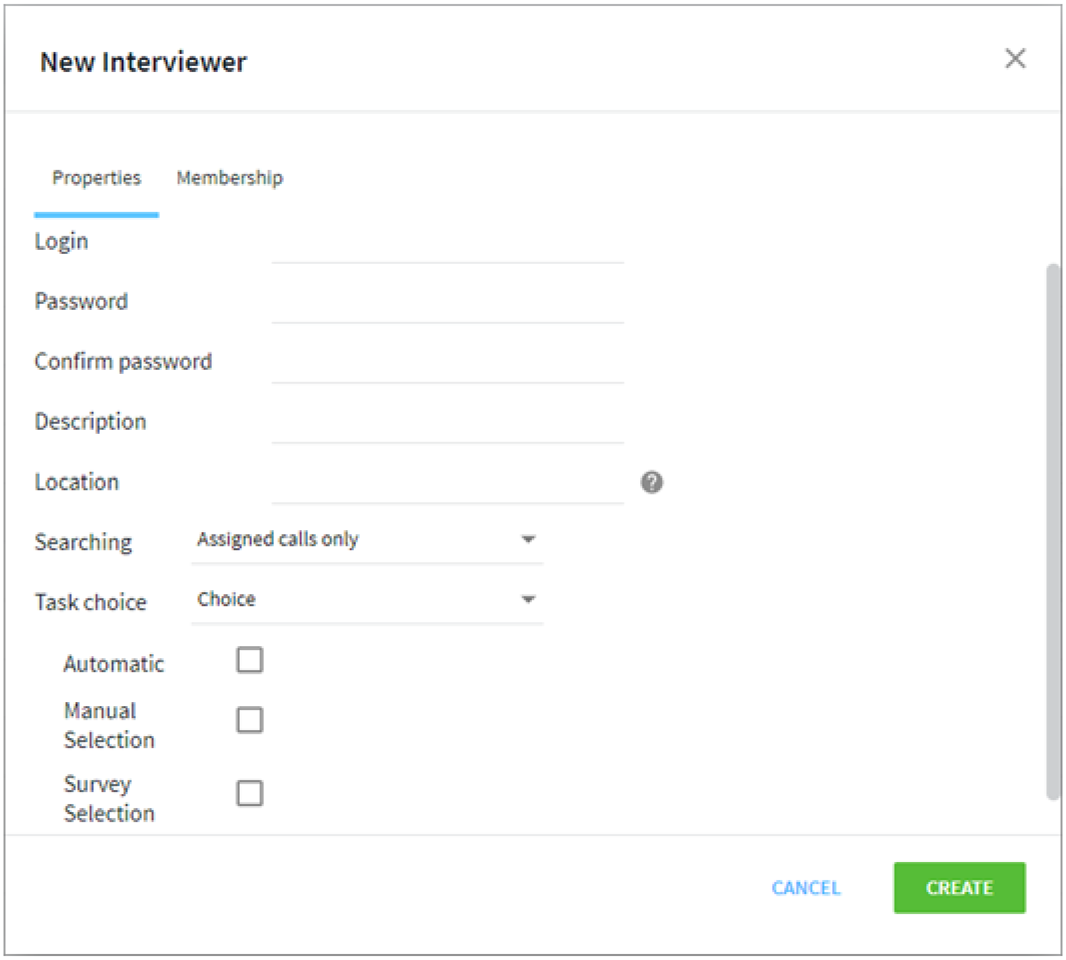


Figure 31 Selecting the "Choice" mode

The Membership tab also allows you to choose a group in which the interviewer is to be included.

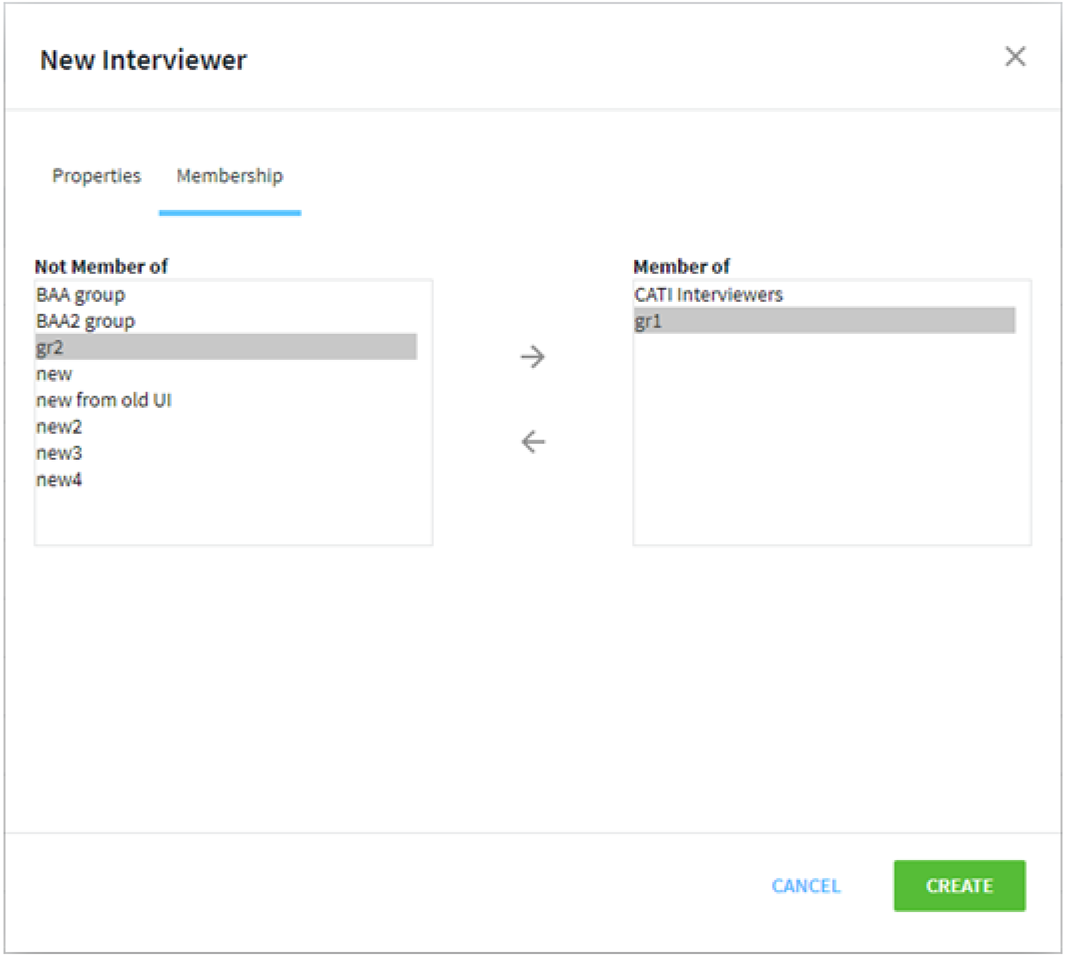


Figure 32 New Interviewer dialog > Membership tab

By default this tab indicates that the interviewer is included in the group used to create this interviewer (i.e. the currently selected interviewer group is used).

You can include the interviewer in any number of groups; existing groups are displayed in the "Not Member of" pane.

Select the group in the left pane (Not Member of) and click the Add arrow button located between panes to move the current interviewer into the selected group. The selected group name moves into the right pane (Member of). Repeat the procedure to add the interviewer to other groups as required.

You can also choose not to include the interviewer in any group. To do this, remove all groups from the right pane (Member of).

11. Finally click **OK** to create an interviewer with the specified properties. The New Interviewer dialog closes and the interviewer name appears in the list in the top right frame of the main module window. This interviewer will also be displayed in the interviewer lists of all groups he/she was included in.

To delete an interviewer:

1. Select one or more interviewers by checking the boxes in front of the required interviewers in the list, or click the required items while holding down the **Ctrl** or **Shift** keys on the keyboard. Click the **Clear Selection** button  to deselect all the selected items.

2. Right-click any selected row in the list, and choose **Delete** from the context menu, or click the **Delete** button in the toolbar in the top frame.
3. Click **OK** to confirm the deletion.

2.2.3. Adding and Deleting IVR Agents

Interactive Voice Response (IVR) agents are virtual agents that can be assigned to surveys with support for IVR capability. IVR functionality is only possible for environments with a supporting dialer integration where one or more IVR agents have been licensed. The number of IVR agents assigned to a survey governs the number of concurrent IVR calls the system can field for the survey at any given moment.

To create new IVR agents:

1. Either right-click any row in the interviewer list and choose **New IVR Agents** from the context menu, or click the **New IVR Agents** button on the toolbar in the top right frame.

   The New IVR agents dialog opens. Here you specify the properties of the IVR agents being created.

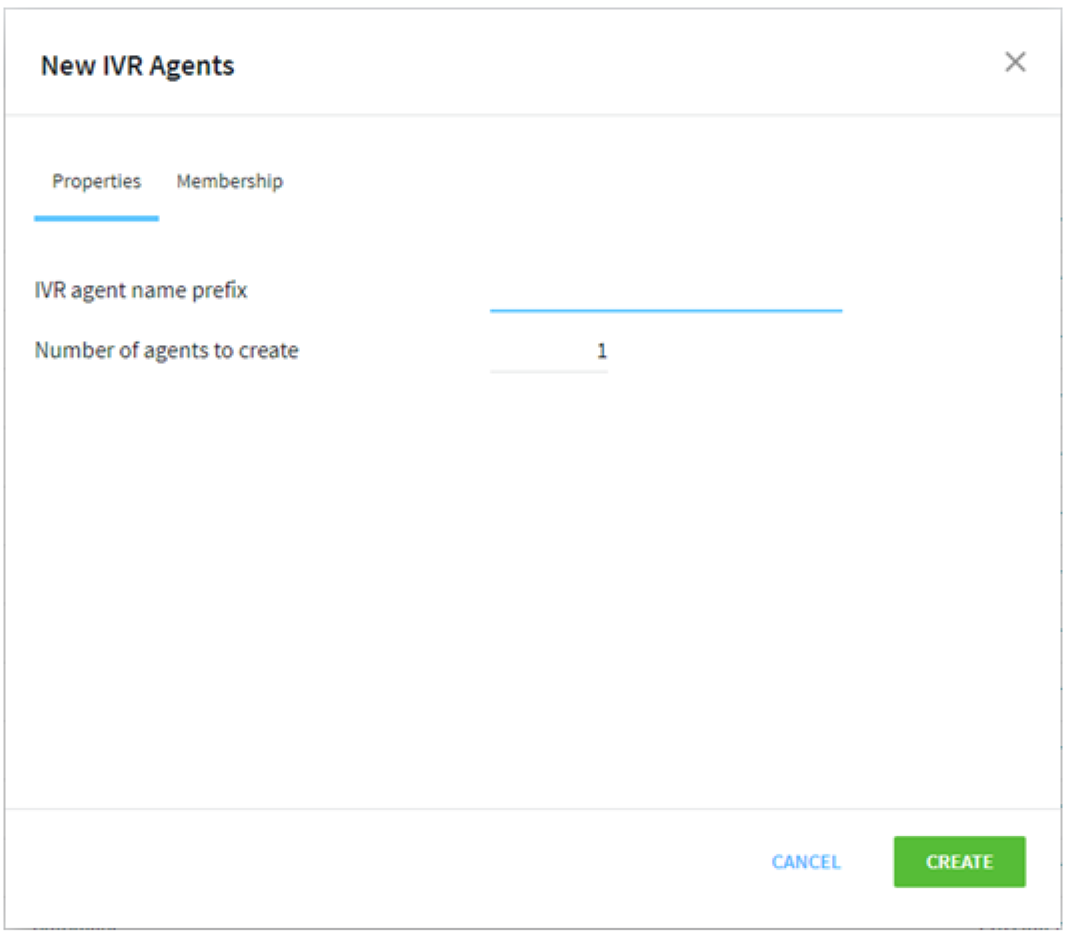


Figure 33 The New IVR Agents page > Properties tab

Note: You are recommended to create IVR agents as groups of persons. This is not mandatory, but it is more convenient. As you will be creating an array of persons in one step, it is a good idea to attach a prefix containing ordinal numbers to each IVR agent name. You could choose a meaningful prefix to explain a task or a circumstance. Ordinal numbers are added to the created array automatically; if the CATI system finds existing IVR agents in the target directory it will check ordinal numbers already assigned to this group and will start the new numbering order from the largest existing number. For example, if the largest existing prefix number is 19, then the system starts numbering new IVR agents from 20.

2. Enter the number of IVR agents you wish to create.

   The total number of virtual IVR agents that can be created for a company is specified by the license which the end user acquires from Forsta. When creating IVR agents you can choose how many “persons” wish to create. You are not obliged to use all of the limit at one time; you can create as many IVR agents as you need. The rest of the limit can be used later.

   The Membership tab enables you to choose a group into which the IVR agents are to be added.

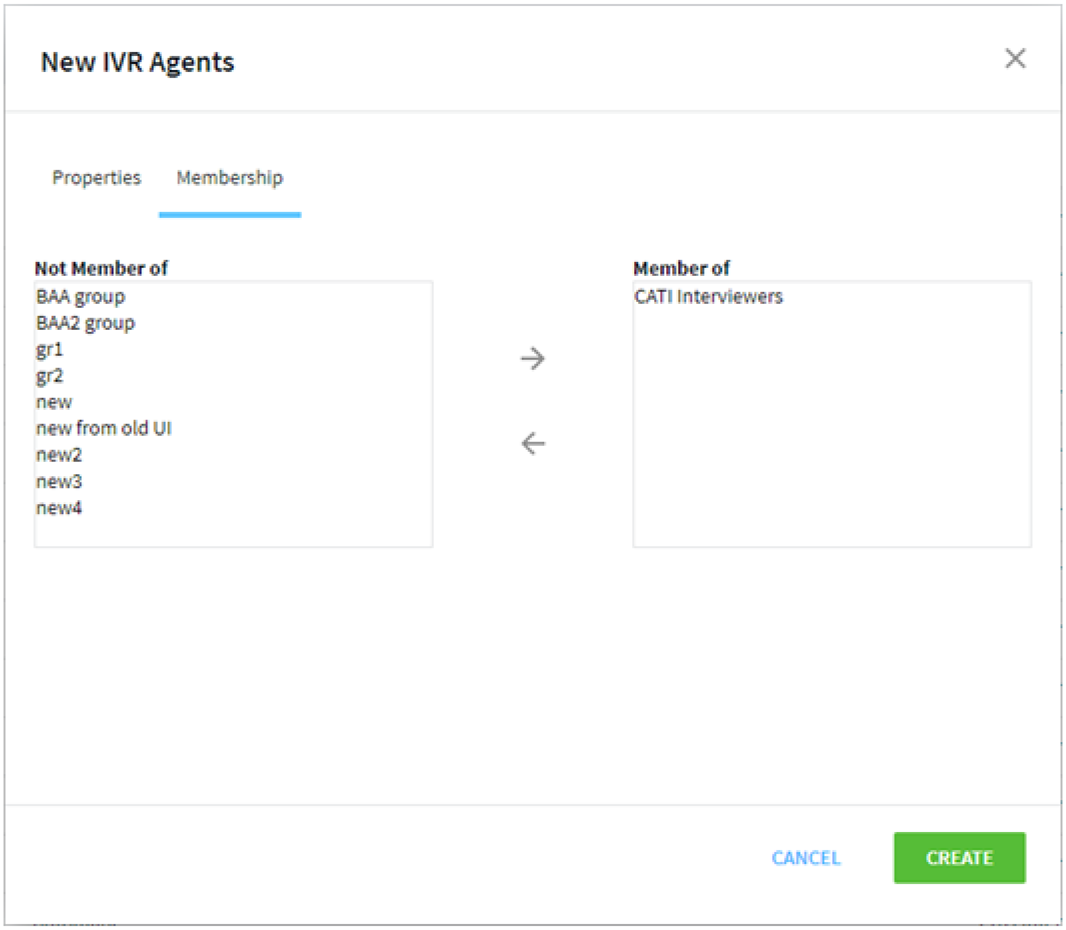


Figure 34 The New IVR Agents page > Membership tab

   By default this is a currently selected group.

   You can include the IVR agents in any number of groups (from the list of existing groups displayed in the "Not Member of" pane).

3. Select the desired group in the left pane (Not Member of) and click the **Add** right-arrow button to move the current interviewer to the Member of pane.

Note that you can also choose not to include the interviewer in any group. To do this remove all groups from the right pane.

4. Repeat the procedure to add the interviewer to other groups as required.
5. Click **Create** to create the IVR agents with the specified properties.

   The New IVR Agents dialog closes and the interviewer name appears in the list in the top right frame of the main module window. The interviewer will also be displayed in the interviewer lists of all groups he/she was added to.

Note that IVR agents normally log into the system automatically a short time after they are created - no special initiation steps are required by the supervisor to run an IVR agent's login procedure. The CATI system periodically checks if there are any IVR agents which are not logged in, and if any are found a login procedure is started for them automatically. An IVR agent will not be logged out until the supervisor either terminates their work or deletes them.

To delete an IVR agent:

1. Select the IVR agents you wish to delete, either by checking the appropriate boxes in the list in the top right frame or by clicking the required agents while holding down the **Ctrl** or **Shift** keys on the keyboard to create a multiple selection. Click the **Clear Selection** button to deselect all the selected IVR agents.
2. Either right-click any selected row in the list (in the top right frame) and choose **Delete** from the context menu, or click the **Delete** button in the toolbar in the top right frame.
3. Click **OK** to confirm the deletion.

Note that when an IVR agent is deleted (or locked) while conducting an interview, this interview will not be terminated - it will reach a point when it is completed, transferred or appointed for a later time. The IVR agent which conducted it can be deleted/locked only after an interview is completed with a result.

2.2.4. Locking and Unlocking the Interviewer's Account

The supervisor can lock the interviewer's account for any reason at any time. The interviewer whose account has been locked will not then be able to log into the system when he/she starts the CATI Interviewer Console. The Console displays the appropriate warning message when a login attempt is made for a locked account.

The supervisor can also lock the account of any interviewer who is currently logged in, even if they are currently conducting an interview. In this case, the interviewer is logged out immediately and the Interviewer Console displays the appropriate warning message. This interviewer will not then be able to log back into the system.

Note that this type of locking is different from the automatic account locking, which is configured separately on the Settings tab of the Resources object. The manual account locking command DOES NOT enable automatic interviewer account locking - it simply locks the interviewer account immediately without any conditions (go to Configuring Settings Related to the Entire Company on page 447 for more information)

To allow the interviewer whose account has been locked to work with the system again, the supervisor must unlock the locked interviewer's account. This can be either an account automatically locked by the system, or an account locked manually by the supervisor. The unlocked interviewer is then allowed to log into the system.

Both the Lock and Unlock commands can be performed for a number of selected interviewers simultaneously.

Note: If an interviewer is locked while an interview is in progress, this interview is aborted and assigned the "Interrupted by system" extended status.

To lock an interviewer's account:

1. Display the Interviewer list (go to Viewing the Interviewer List on page 25 for more information).
2. Right-click the required interviewer's name or select a number of interviewers.
3. Right-click the selection in the list and choose **Lock** from the context menu.

   A prompt is displayed asking you to confirm the action.

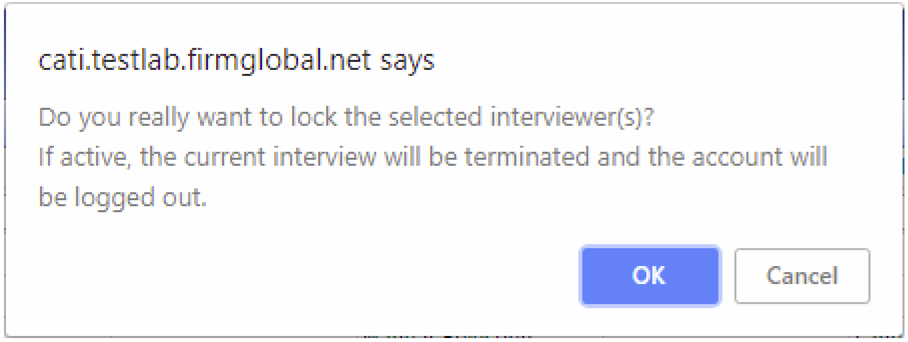


Figure 35 Confirming interviewer account locking

4. Click **OK** to lock the selected interviewer(s).

   The Interviewer list is refreshed, and any locked interviewer accounts are grayed out and marked. The Locked column shows "Yes", and the Locked Date column displays time and date when the account was locked.

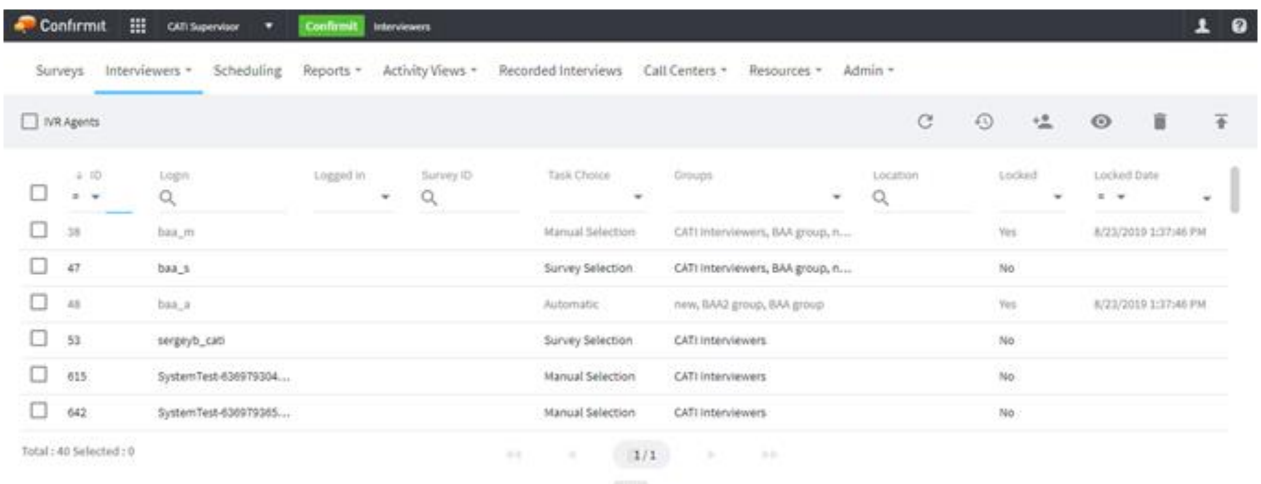


Figure 36 Interviewer list showing locked interviewer accounts

To unlock an interviewer's account:

1. Display the Interviewer list (go to Viewing the Interviewer List on page 25 for more information).
2. Right-click the locked interviewer's name or select a number of locked interviewers and right-click the selection in the list and choose **Unlock** from the context menu.

   A prompt is displayed asking you to confirm the action.

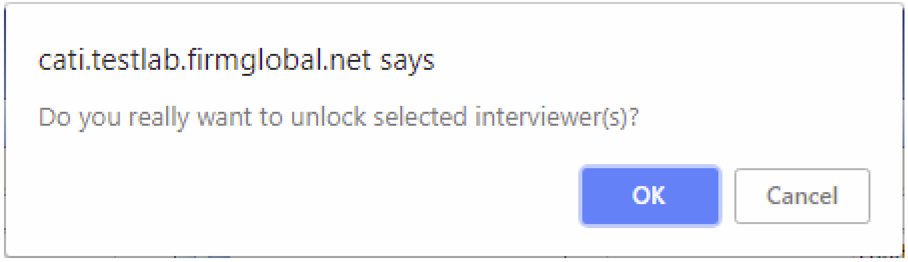


Figure 37 Confirming interviewer account unlocking

3. Click **OK** to unlock the selected interviewer(s).

   The Interviewer list is then refreshed, and locked interviewer account names are displayed in normal font, with all lock marks removed.

2.2.5. Seamless Switching of an Automatic Survey

Note that the feature described in this topic is available only if the Seamless Automatic Survey Switching feature is enabled for the company by a system administrator.

The Supervisor can seamlessly change an automatic survey that was originally allocated to an interviewer. This means that the interviewer for whom this change is performed will be switched to work with another designated survey and the supervisor will not have to perform any extra action to complete this switching. When the interviewer finishes the current interview, the system will take them to another interview which belongs to a different survey.

The following conditions must be satisfied before a seamless survey switch can be performed:

- The interviewer must be logged into the Interviewer's Console and must be working on an interview at the moment the new Automatic Survey is assigned to him;
- The interviewer must work in the Survey Selection mode with an Automatic Survey assigned to him;
- Dialing for the newly assigned automatic survey must be set to the same mode as for the previous one (for example if the current automatic survey is set to the "Manual" dialing mode then the replacement survey must also be set to the "Manual" mode).

When these conditions are met, the Supervisor can use the procedure described below to specify a survey to which the interviewer will be switched.

If a new automatic survey is defined for an interviewer but they have left for a break, or logged out after finishing the current interview, or they are currently in the process of logging in, then the interview from a new Automatic survey will be delivered when they return from the break or when they next log in. In these events a warning message is presented to the supervisor:

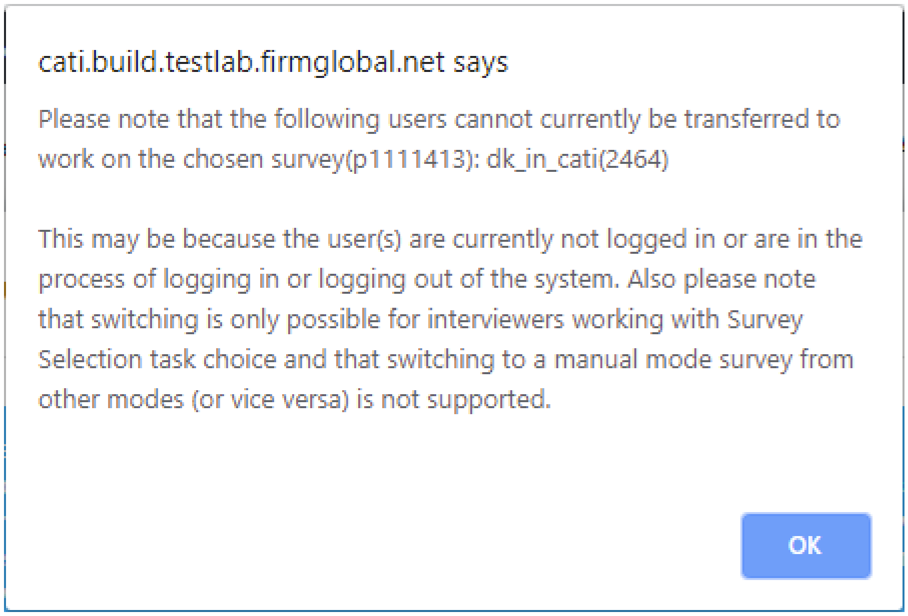


Figure 38 Example of the warning message

The supervisor should close the message and repeat the procedure choosing a valid new automatic survey.

To seamlessly change an automatic survey:

1. Check if the dialer is enabled for the interviewer's company.
2. Ensure the interviewer for whom you are going to change an Automatic Survey is working in the Survey Selection mode with the Automatic survey specified for him.
3. Check also that they are currently logged into the Interviewer's Console and are working on an interview.
4. Go to the Interviewers tab in the Navigation frame and view the list of interviewers.
5. Find the required interviewer and right-click this interviewer in the list.
6. Choose **Change Automatic Survey** from the context menu that appears.

   The Change Automatic Survey dialog appears.

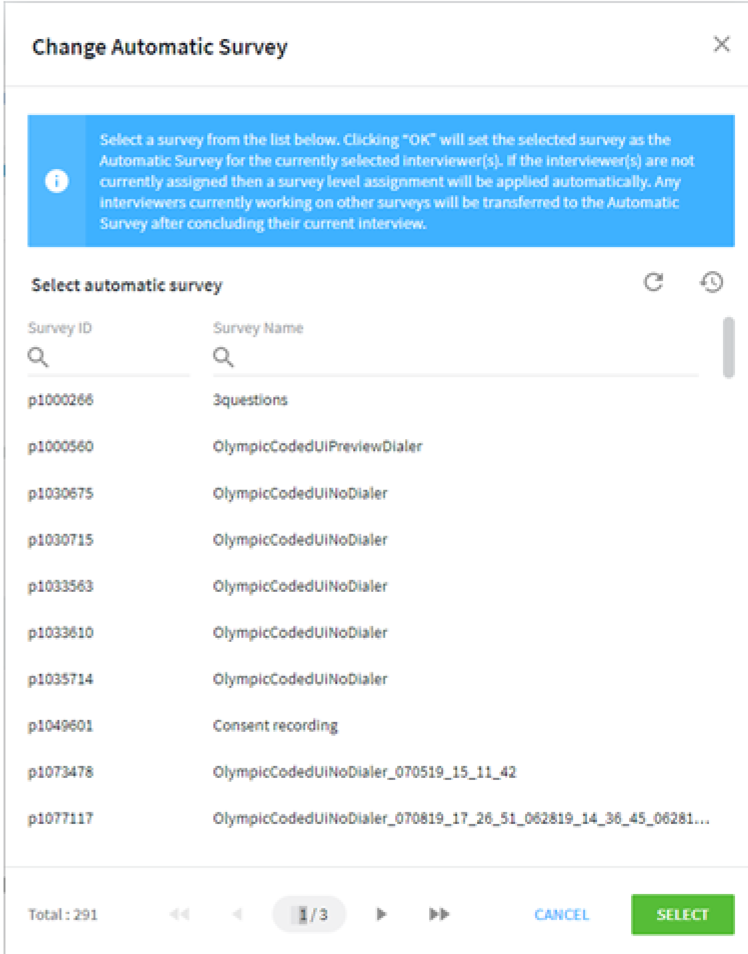


Figure 39 Seamless change of an automatic survey

7. Choose a survey in the list and click on it.
8. Click the **Select** button.

   The Change Automatic Survey dialog closes.

Note: The automatic survey change occurs only when the interviewer finishes the current interview. When the interview is concluded, the interviewer is automatically logged out of the Interviewer Console and then logged in. At this moment the new automatic survey that was selected in the Change Automatic Survey dialog is assigned to him and the corresponding interview is delivered.

A message informs the interviewer of the change.

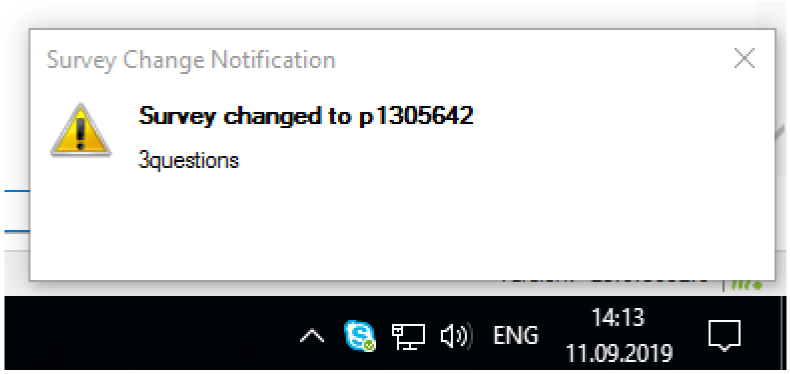


Figure 40 Information message displayed upon the seamless change of an Automatic Survey

The notification displays the name of the newly assigned Automatic Survey and the name of the company the interviewer currently works for.

2.2.6. Viewing and Modifying the Interviewer Properties

You can modify the properties you have specified when creating an interviewer. To do this:

1. Right-click the required row in the interviewer list and choose **Properties** from the context menu, or

   Click the **Properties** button in the toolbar in the top right frame.

   The interviewer properties are displayed in the bottom frame. This frame uses tabs to display the interviewer properties - use these tabs to modify parameters of the existing interviewer.

   Tabs displayed in the interviewer Properties mode are similar to those used with the New Interviewer dialog (go to Adding and Deleting an Interviewer on page 27 for more information). The same working method applies with these tabs.

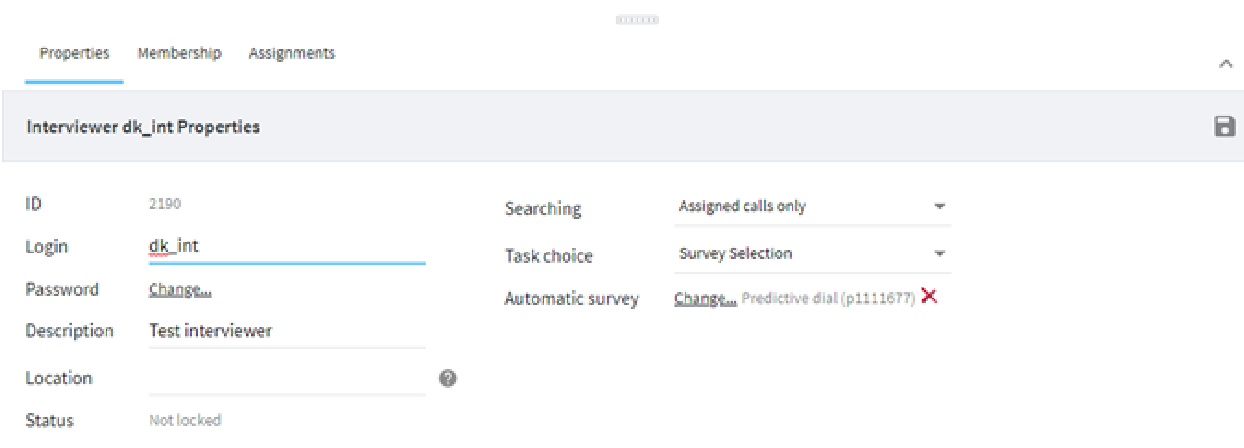


Figure 41 The Interviewer properties on the Properties tab

- The **ID** field shows the interviewer's identifier.
- The login name for any interviewer can be edited - click in the **Login** field and edit the name as required.
- The interviewer's password is never displayed. Click the **Change** button to change the current interviewer's password. A form is displayed below the button containing two fields – New Password and Confirm Password. Enter the new password in both fields and click **OK** to change the interviewer's password.
- The **Description** field allows you to add a short description of the interviewer in the free form.

- The **Status** field shows whether or not this interviewer's account is currently locked. The field below - **Locked date** - is displayed only when the interviewer is currently locked, and it shows the date on which the interviewer was locked (go to Locking and Unlocking the Interviewer's Account on page 33 for more information).
- The **Location** field is used to identify the location of the interviewer to the dialer. Interviewers can be assigned a free text optional Location attribute which will be passed to a connected dialer (go to Changing a Location for an Interviewer on page 62 for more information).
- The **Searching** option affects interviewers working in the Manual Interviewing mode only. This drop-down box contains options that define whether the interviewer would be able to see calls that are not assigned to him. By default the **Assigned calls only** option is enabled. This means the interviewer can see only calls that are assigned to him or to the group he currently belongs to. When the **All calls** option is enabled, the interviewer can also see calls which are contained in the survey assigned to him but are explicitly assigned to other interviewers.
- The **Call Group** option allows you to apply custom call delivery rules by choosing from a number of preconfigured call sets. For a full description of the option and configuration procedure (go to Configuring the Call Groups on page 341 for more information). This option is enabled and disabled by the system administrator, and is not available through the regular CATI Supervisor module interface.

Note: The Call Group option can only be applied to the interviewers who are assigned to working in the Survey Selection Interviewing mode (see Interviewing mode descriptions below).

If you attempt to select a call group from the Call Group list for an interviewer who is currently assigned to work in an Interviewing mode other than Survey Selection, a warning is displayed - see below. Hover the mouse pointer over the Warning to open a tooltip with a description of the cause of the error.

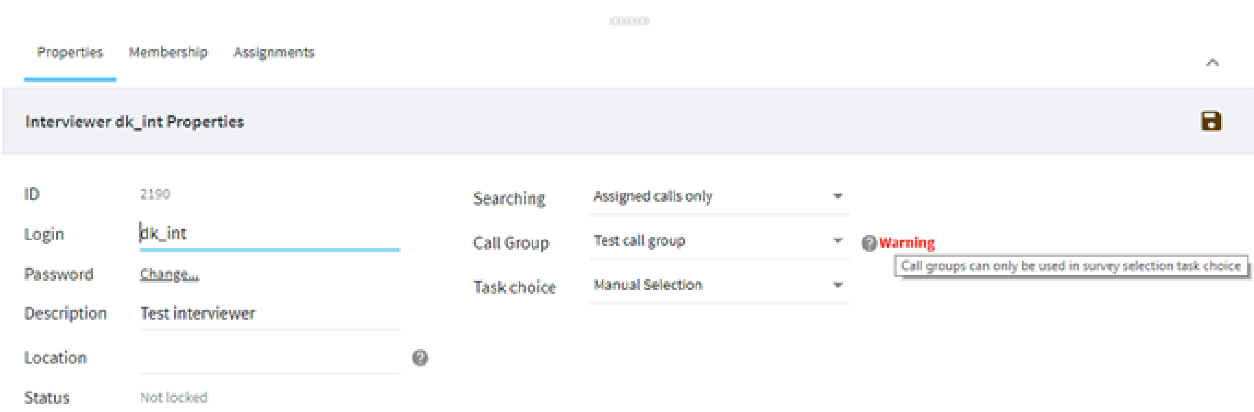


Figure 42 The Warning displayed

The **Task Choice** field allows to to specify how calls are delivered to the interviewer when they work with the CATI Interviewer Console (go to Selecting a Survey/Interview on page 252 for more information).

Automatic and Manual selection Interviewing modes do not assume any additional configuration, but if Survey selection or Choice mode are selected then the Properties tab will refresh and will contain the following options:

- For the Survey selection Interviewing mode, the Properties tab will display the **Automatic Survey** option. Automatic Survey is a survey which is delivered forcibly at the time the interviewer logs into the CATI Interviewer Console. The Interviewer will not be delivered calls for any other surveys, regardless of any valid assignments to them (go to Selecting a Survey/Interview on page 252 for more information). If a survey is already assigned to the interviewer to be served as the Automatic survey, its name will appear along with the **Change** button. If the interviewer is not assigned to an Automatic survey, only the **Change** button will be available.

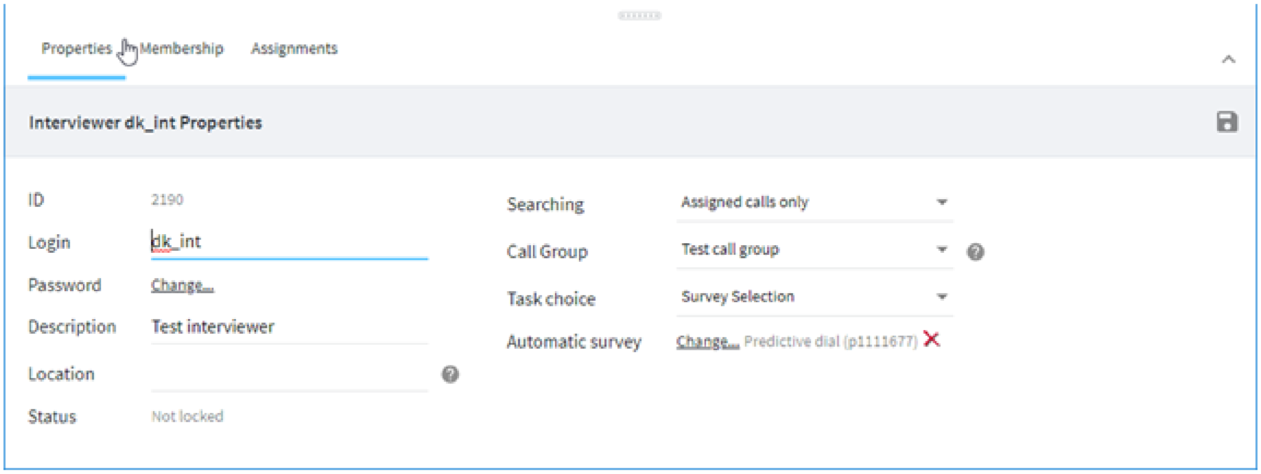


Figure 43 The Interviewer properties > Properties tab. The Survey Selection mode is chosen

- If an automatic survey has already been specified (as in the illustration above), you can clear this specification (specify work in the Survey Selection mode without an Automatic Survey). To do this click the **Clear Automatic Survey** button to the right of the survey name in the Properties tab. This will display the Select Automatic Survey dialog, allowing you to select an Automatic survey. Select a survey and click **OK** in this window to confirm the selection. If a survey was set as an Automatic Survey before, it will be replaced by the currently selected one.

You can change ("switch") an automatic survey for a selected interviewer using the "Seamless Automatic Survey Switching" facility. Such "seamless" (fast) change of an automatic survey assumes replacing one survey with another when the interviewer finishes the current interview. The interviewer does not have to perform any action - they are only informed of the change via a message. Seamless Automatic Survey Switching is set up from the All Interviewers list using the context menu command (go to Seamless Switching of an Automatic Survey on page 35 for more information).

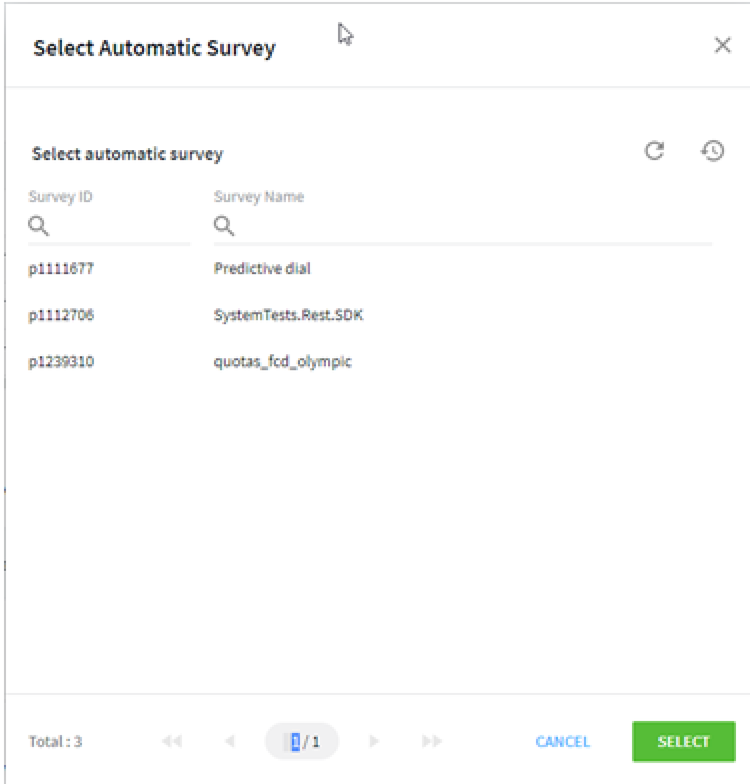


Figure 44 Selecting an Automatic survey in the Survey Selection Interviewing mode

The Choice mode can be selected in case the interviewer should select a mode to work in from those that are allowed by the Supervisor. When the Choice mode is selected, the Properties tab will refresh and will display the Automatic, Manual, and Survey Selection mode options below the Task Choice field. These options can be selected by checking the box beside the mode name. The checked modes will be available for the interviewer to choose from at the time he logs into the CATI Interviewer console (go to Choice Mode on page 257 for more information).

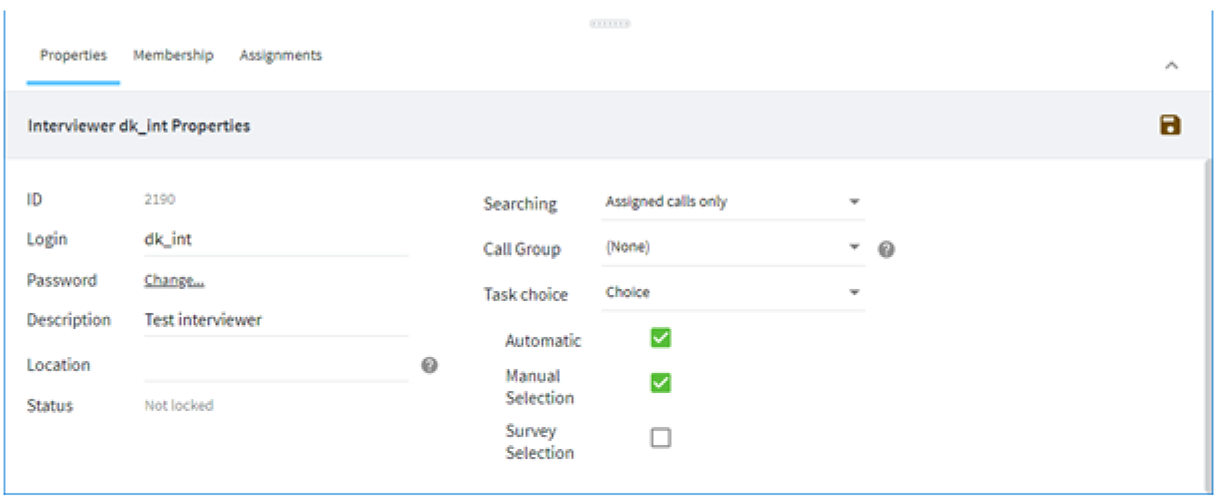


Figure 45 The Interviewer properties > Properties tab. The Choice mode is selected

If the supervisor specifies the Survey Selection option for an interviewer working in the Choice mode, they can also specify an Automatic Survey (as when the Survey Selection Interviewing mode is selected - see description above). An Automatic Survey assignment procedure in the Survey Selection mode is similar to the one described above.

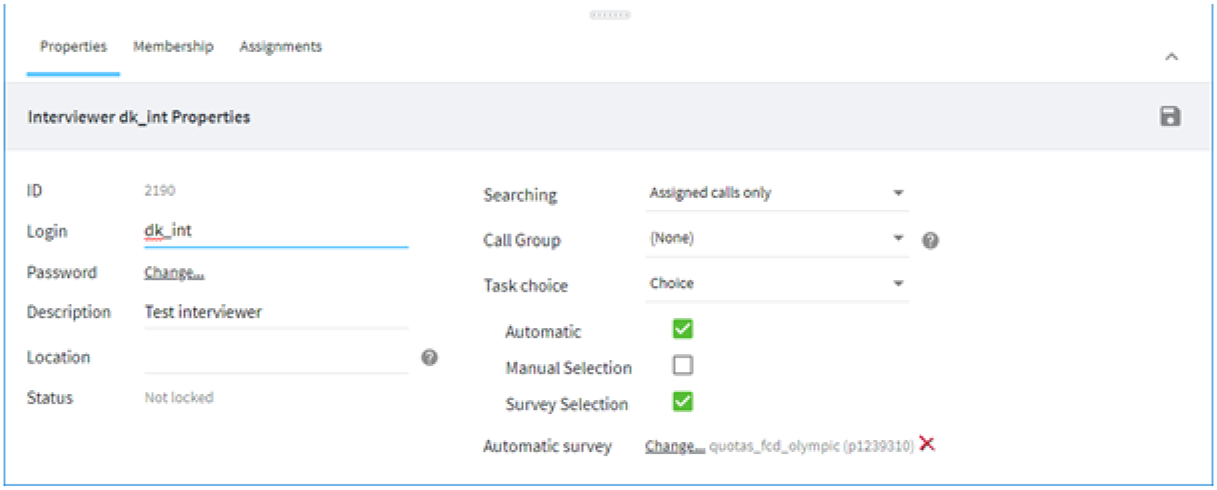


Figure 46 The Interviewer properties > Properties tab. Automatic Survey is selected for the interviewer working in the Choice mode

The Interviewing mode can also be changed from the Interviewer List (go to Viewing the Interviewer List on page 25 for more information). This operation is performed using the context menu command Change Task Choice - this context menu is available for each interviewer displayed in this list (go to Changing the Interviewing Mode for an Interviewer on page 59 for more information).

When the TCPA compliance mode is enabled for the company, the **Dial Type** field becomes available on the Properties tab. Each interviewer is assigned either the “Landline”, or the "Cellphone" dial type. Select the required option from the Dial Type drop-down box. The “Landline” dial type assumes phone numbers are dialed both manually and automatically, while the “Cellphone” dial type assumes phone numbers can be dialed only manually (go to Dialing in the Single Survey TCPA Mode on page 357 for more information).

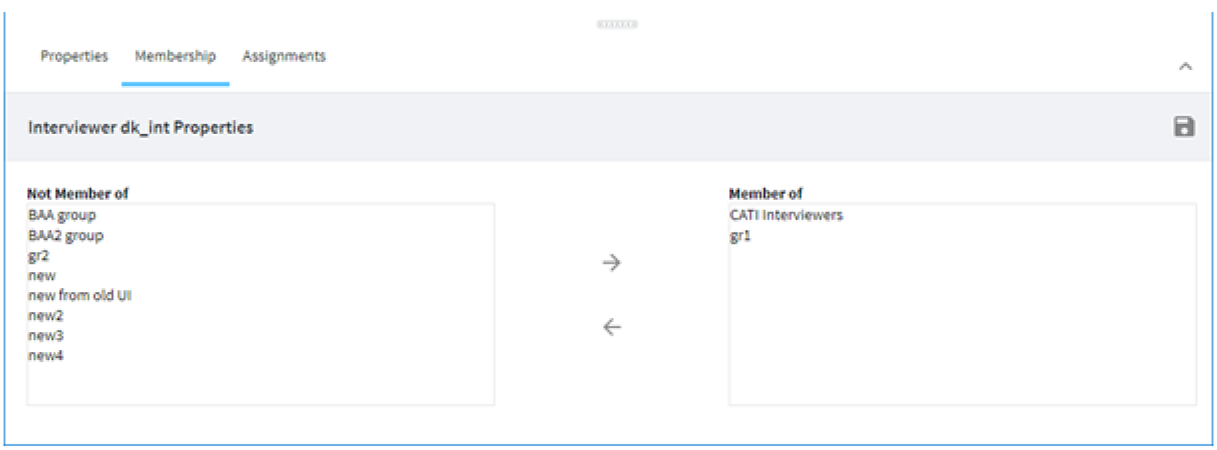


Figure 47 Interviewer properties, the Membership tab - the bottom right frame

Note: The Properties and Membership tabs contain the Save button on the toolbar. If you have introduced changes to any of the properties described here, the Save button flashes, prompting you to save the changes. Always save the changes you make on any of these tabs before you leave the tab - otherwise the changes will be lost. CATI Supervisor prompts you by displaying a warning message if you attempt to leave a tab containing unsaved changes.

- The Assignments tab allows you to view, add, replace and delete (de-assign) survey assignments for the current interviewer.

Figure 48 The Interviewer properties > Assignments tab

The Assignment tab presents a list of all existing assignments made for the currently selected interviewer. The tab also indicates particular assignments that were made for the group to which the interviewer belongs. If the assignment was made for the group, the name of this group appears in the Group Assignment column.

The list shows the following information for each assigned survey:

- The assigned project ID.
- Its name.
- An indication of the group assignment.
- The number of calls assigned for the interviewer.
- A survey selected as an Automatic Survey is highlighted in green.

To assign new surveys to the interviewer:

1. Click the **New** button on the toolbar, or right-click any row and choose **New** from the shortcut menu.

   The Select Surveys to assign dialog opens.

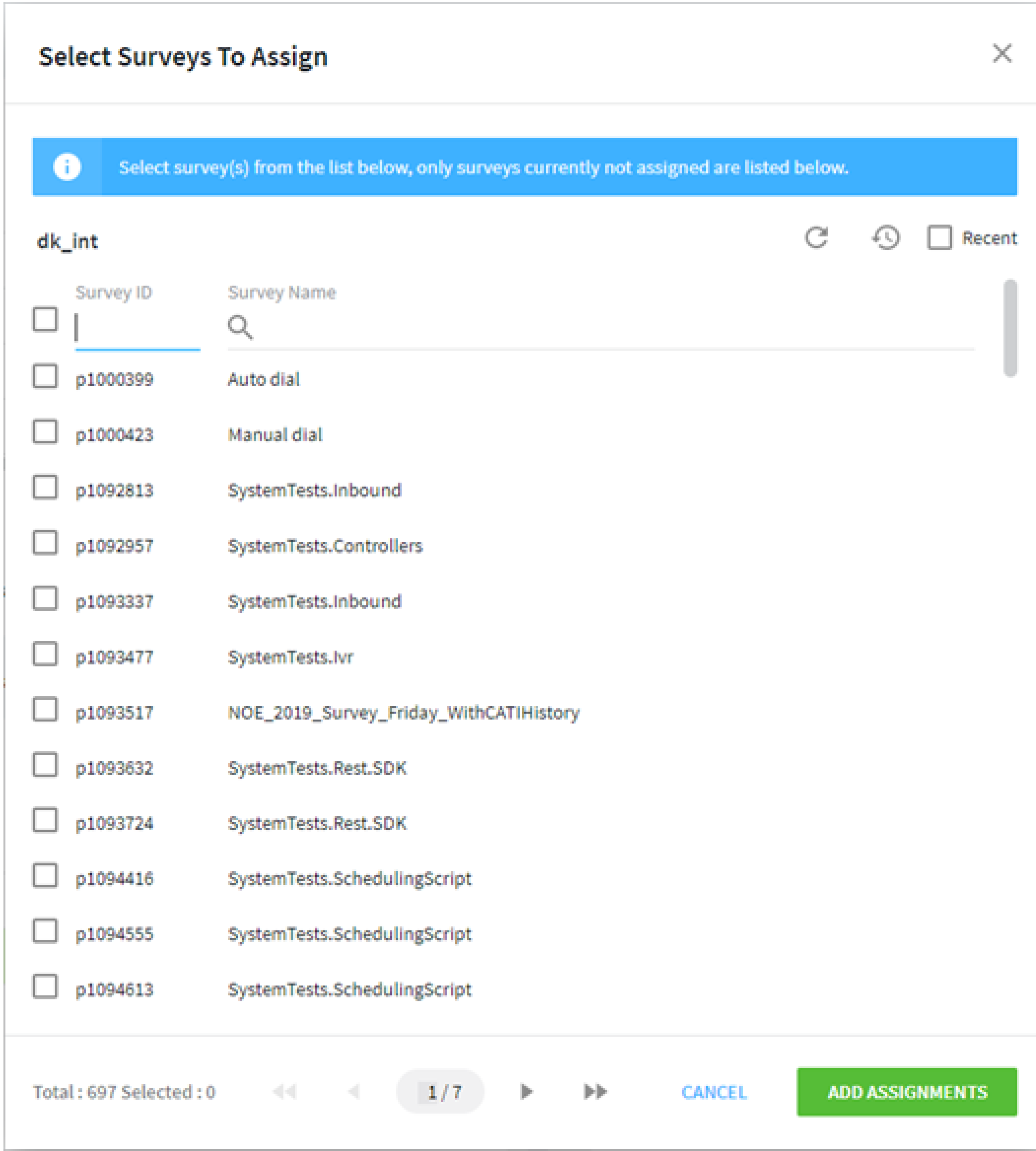


Figure 49 Selecting a survey to assign

This dialog lists only surveys that are not assigned to the currently selected interviewer.

2. Select the required surveys by checking the relevant boxes, or click the required items while holding down **Ctrl** or **Shift** keys on the keyboard to create a multiple selection.

3. To manually refresh the survey list, click the **Refresh** button on this window toolbar. To clear the complete selection by pressing the Clear Selection button .

   To make a process of selecting a survey more convenient the system allows showing only "recent" surveys - these are the surveys which contain interviews that had their extended status changed recently. Check the "Recent" box to enable this filter (go to Changing the Survey in Call Management on page 123 for more information).

   Choose a Dial Type from the drop-down box. This option allows for dialing numbers while observing TCPA compliance requirements (go to Dialing in the Single Survey TCPA Mode on page 357 for more information).

Click **OK** when you are done selecting surveys. This window will close and the selected surveys will be displayed in the grid in the Assignments tab.

Remember that the surveys you select to assign using the above described method are *added* to already existing assignment list, they do not *replace* it. Refer to the next step (below) for the assignment replacement procedure.

- You can completely replace already existing survey assignments for the current interviewer.

  Note that this action completely replaces all the existing assignments with the currently selected ones. This action cannot be reverted.

  To do this click the **Replace** button on the tab toolbar. This will display the Select Surveys to Assign dialog.

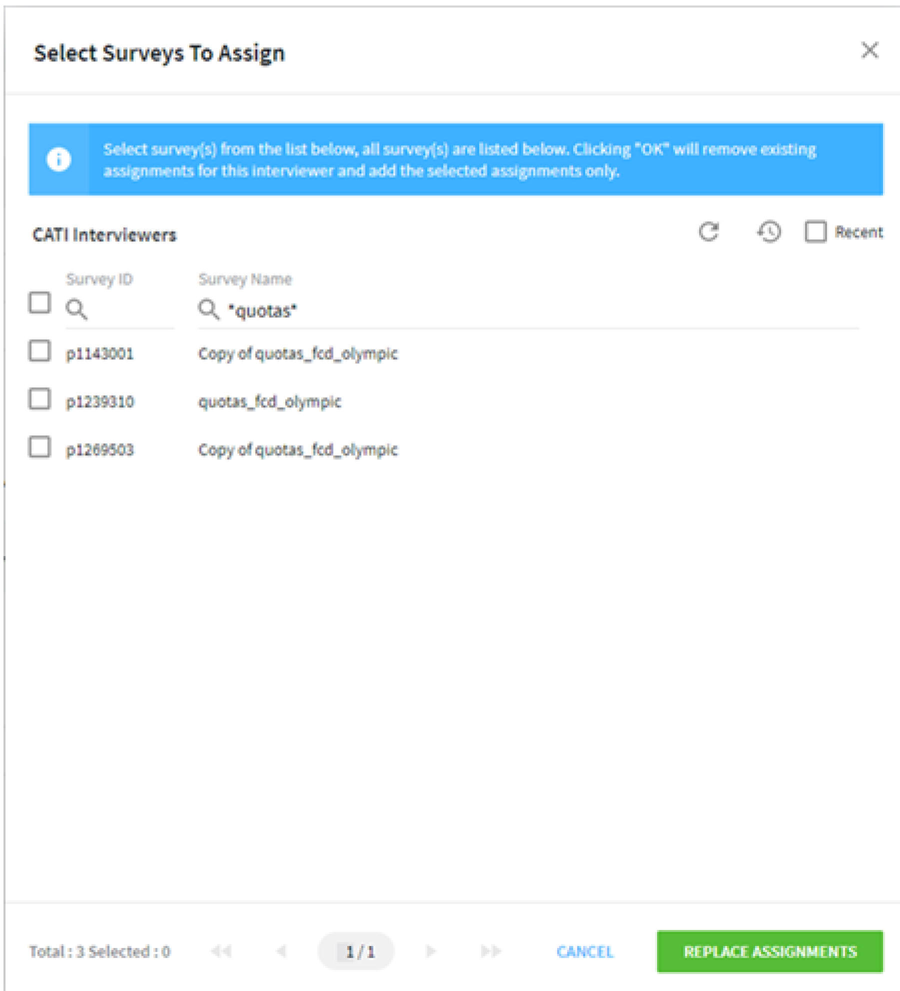


Figure 50 Selecting surveys to replace the existing assignment for an interviewer

Select the required surveys by checking boxes in front of the survey names (or click the required items while holding down **Ctrl** or **Shift** keys on the keyboard to create a multiple selection). You can manually refresh the survey list by pressing the Refresh button on this window toolbar, and you can clear the complete selection by pressing the Clear Selection button .

Click **OK** when you are done selecting surveys. CATI Supervisor displays the warning message, asking you to confirm the assignment replacement action.

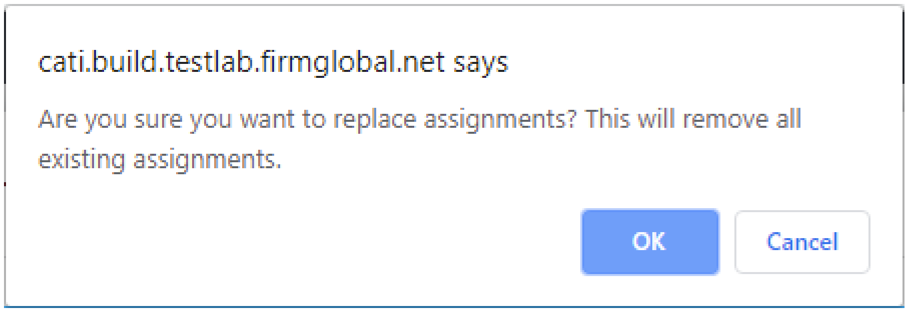


Figure 51 Warning message displayed on the attempt to execute the assignment replacement

Click **OK** to confirm replacement. The specified assignment completely replaces currently existing one. This action cannot be reverted.

5. Using the Assignments tab you can set an Automatic Survey (the survey to be served forcibly at the time the interviewer logs into the CATI Interviewer Console) for those interviewers who work in the Survey Selection mode. This is the same action as the one available from the Properties tab. You can clear the Automatic Survey assignment by pressing the **Deassign** button on the tab toolbar.

   You can also replace an existing assignment for the interviewer - select a survey to replace and click the Replace button in the toolbar. This opens the (see the picture below). The procedure is similar to that used to assign a survey.

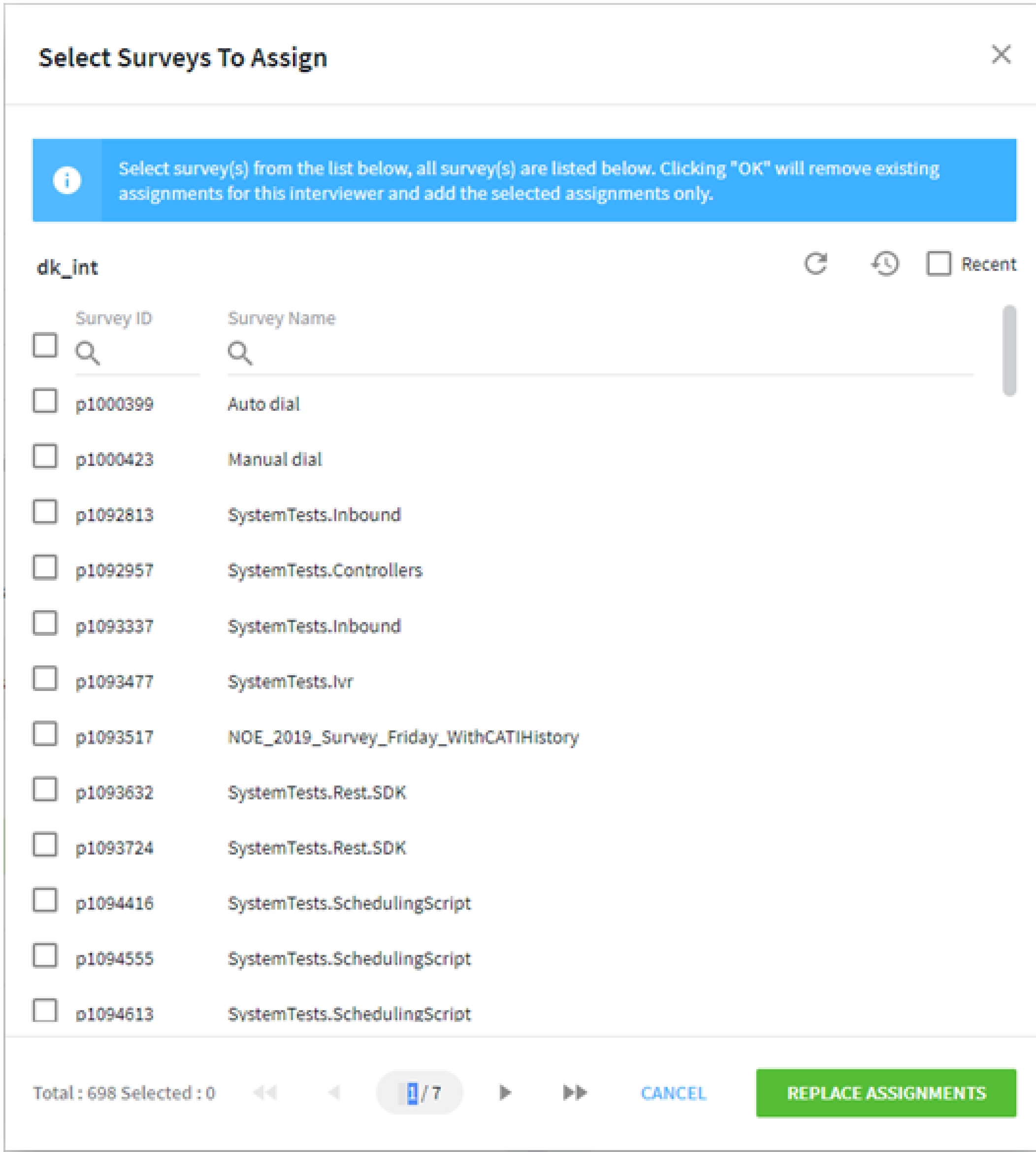
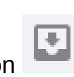


Figure 52 Replacing an assigned survey from the Assignments tab

To set an Automatic Survey for the interviewer:

1. Select a survey from those listed on the Assignments tab and click the **Set Automatic Survey** button  in the tab toolbar.

   The Assignments tab refreshes and the survey set as an Automatic Survey is highlighted in green.

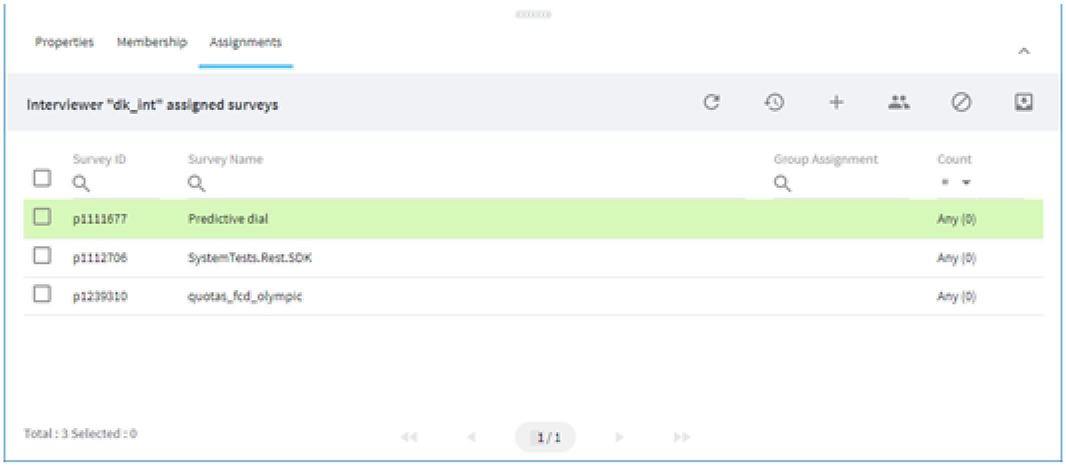


Figure 53 Automatic Survey selected for the interviewer

If another survey has already been selected as an Automatic Survey it is replaced by the currently selected one (the green highlighting is moved to the currently selected one). The Automatic Survey indication on the Properties tab also changes.

To de-assigned an automatic survey (removed it from the list):

1. On the Assignments tab, select the required surveys by checking their boxes.
2. Click the **De-assign** button on the tab toolbar.

   Alternatively select a row, right-click on it, then choose **De-assign survey** from the shortcut menu.

   A confirmation dialog is displayed.
3. Click **OK** to proceed with the De-assign action.

   The list is refreshed and the selected surveys are removed from the list.

2.2.7. Viewing and Modifying the IVR Agent Properties

You can edit the properties of any IVR agent in the same way you edit the properties of a "human" interviewer. Note that you can only edit these properties when the Interviewers list displays IVR agents. IVR agents only have the Membership (membership in groups) and the Assignments (a list of Assignments) properties. These two can be edited at any time.

Note that when you edit IVR agent properties while an agent is conducting an interview, the agent will be allowed to finish the interview before the property change takes effect. Any property change comes into effect only when the agent has finished the interview.

Note that the Membership tab includes the **Save** button on the toolbar. If you update the membership data for the current IVR agent, the **Save** button will flash prompting you to save the changes. Always save the changes before you leave the tab - if you leave the tab before saving, these changes will be lost. CATI Supervisor prompts you by displaying a warning message if you attempt to leave the page containing unsaved changes.

To modify the IVR agent properties

1. Right-click the required row in the IVR agent list (in the top right frame), and choose **Properties** from the context menu, or click the **Properties** button in the toolbar in the top right frame.

   The IVR agent properties are presented in the bottom right frame. This frame uses tabs to display the IVR agent properties.

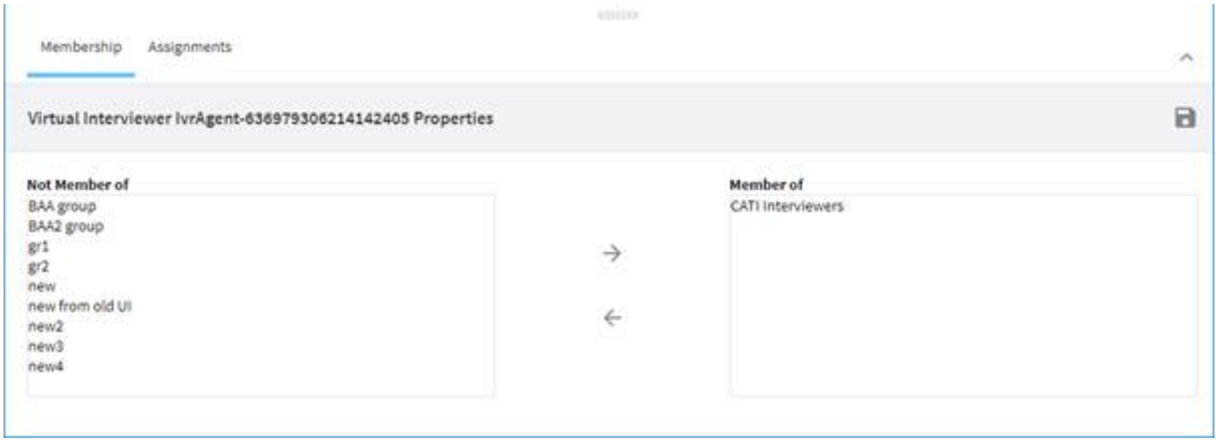


Figure 54 The Membership tab of an IVR agent properties

You can add an IVR agent to any interviewer group created for the company. The list of groups available for this operation is shown in the left scrollable list (Not Member Of) of the Membership tab.

2. Choose one group in the list and click the right-arrow button between the lists.

   The group name is moved from the left list to the right list.

   To remove an IVR agent from a group, choose a group from which you want to remove an IVR agent and click the left-arrow button. The selected group name is moved from the right list (Member Of) to the left list (Not Member Of).

   The Assignments tab allows viewing, adding, replacing and deleting survey assignments (de-assigning surveys) for the selected IVR agent.

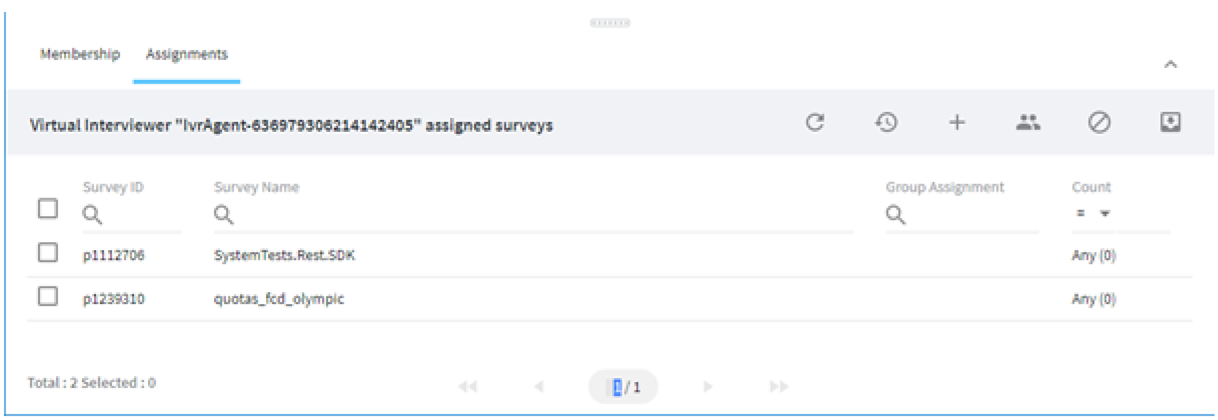


Figure 55 IVR agent properties, the Assignments tab

The Assignments tab contains the list of all existing assignments made for the currently selected IVR agent. The tab indicates particular assignments that were made for the group to which the IVR agent belongs. In the event the assignment was made for the group, the name of this group appears in the Group Assignment column.

The list in the Assignment tab shows the assigned survey ID, its name, an indication of the group assignment, and the number of calls assigned for the interviewer.

To assign new surveys to the IVR agent

1. Click the **New** button  on the toolbar, or right-click any row and choosing **New** from the shortcut menu.

The Select Surveys to Assign dialog opens.

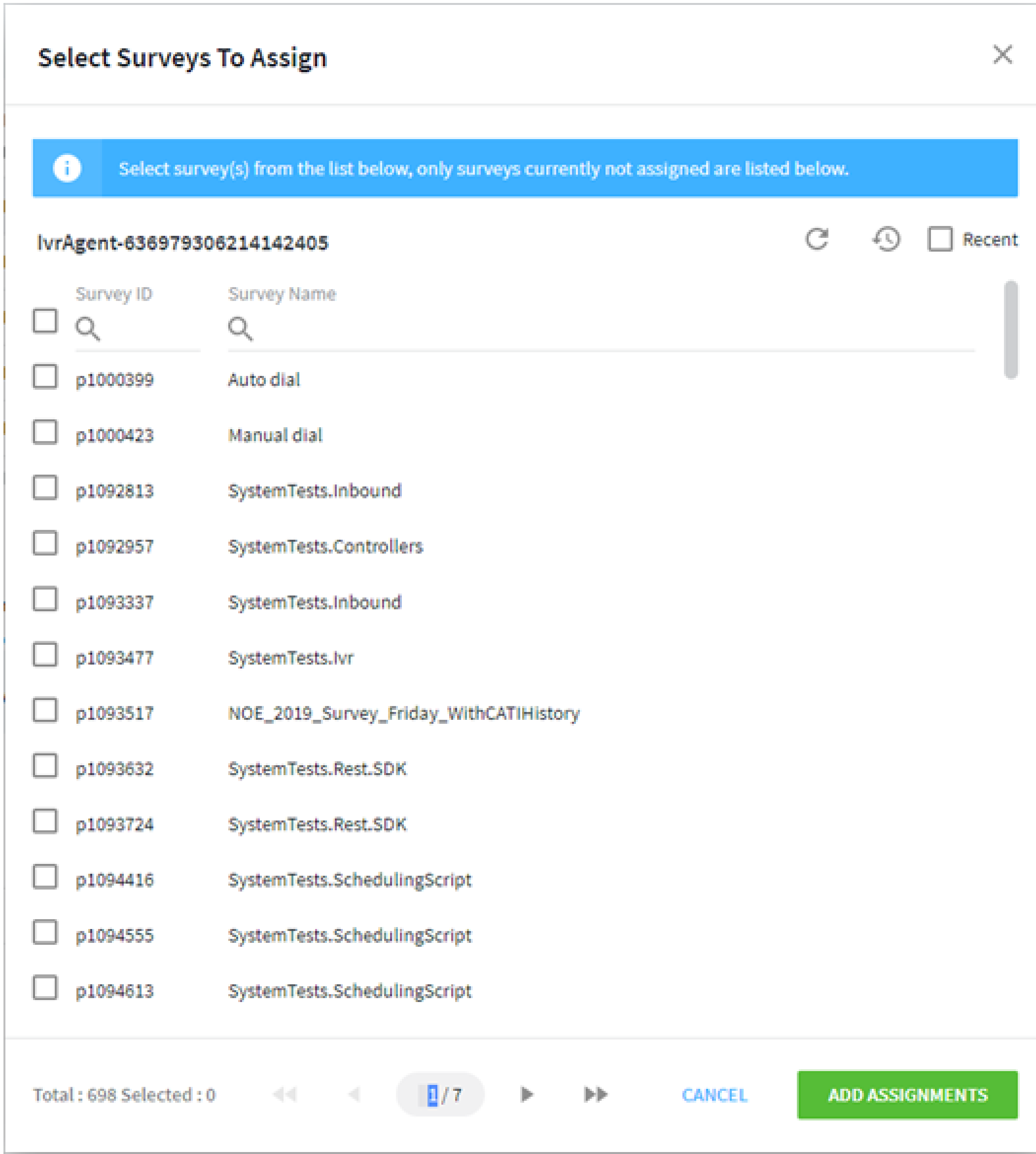


Figure 56 Selecting a survey to assign using the Select surveys to assign dialog

This dialog lists only surveys that are not assigned to the currently selected IVR agent.

2. Select the required surveys by checking the appropriate boxes, or click the required items while holding down the **Ctrl** or **Shift** keys on the keyboard to create a multiple selection.

   To manually refresh the survey list, press the **Refresh** button on the window toolbar. To clear the complete selection, press the **Clear Selection** button.

   To simplify the process of selecting a survey, you can select to see only "recent" surveys. These are the surveys that contain interviews that had their extended status changed recently. Check the "Recent" box to enable this filter (go to Changing the Survey in Call Management on page 123 for more information).

3. Choose a Dial Type from the drop-down box.

This allows for dialing numbers while observing TCPA compliance requirements (go to Dialing in the Single Survey TCPA Mode on page 357 for more information).

4. On completion click **OK**.

   The window closes and the selected surveys are displayed in the grid in the Assignments tab.

   Note that the surveys you select to assign using the above described method are added to the already existing assignment list, they do not replace it. See the next step.

You can completely replace already existing survey assignments for the current IVR agent with the currently selected ones. This action cannot be reverted. To do this:

1. Click the **Replace** button on the tab toolbar.

   The Select Surveys to Assign dialog opens.

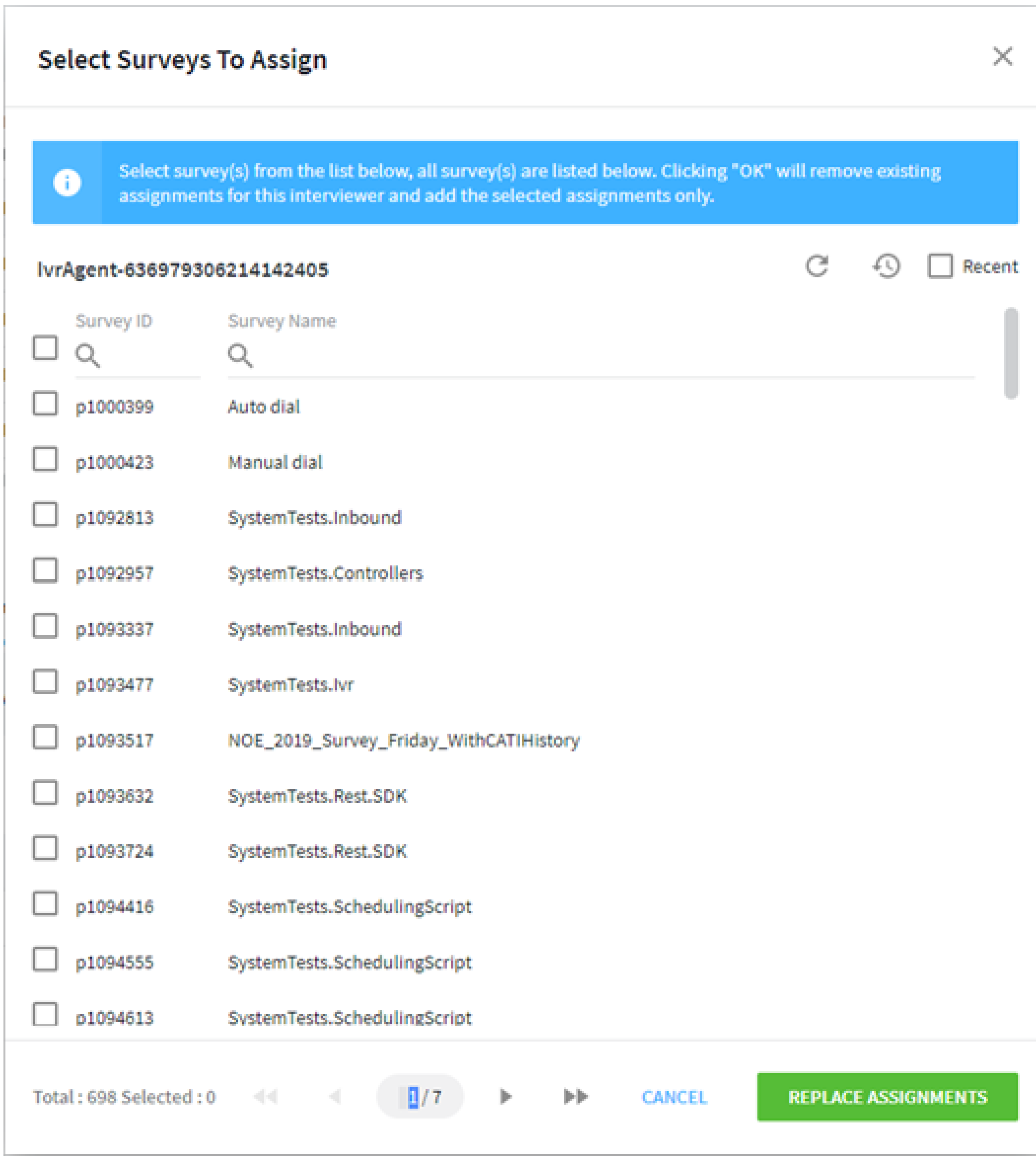


Figure 57 Selecting surveys to replace the existing assignment for an IVR agent

2. Select the required surveys by checking boxes in front of the survey names, or click the required items while holding down **Ctrl** or **Shift** keys on the keyboard to create a multiple selection.

   To manually refresh the survey list, click the **Refresh** button on this window toolbar. To clear the complete selection, click the **Clear Selection** button .

3. On completion click **OK**.

   A message is displayed asking you to confirm the assignment replacement action.

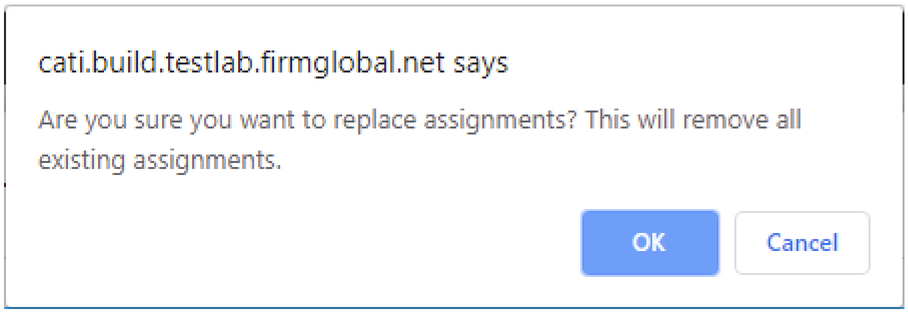


Figure 58 Confirmation message

4. Click **OK** to confirm the replacement.

   The specified assignment completely replaces currently existing one. This action cannot be reverted.

2.2.8. Adding and Replacing Survey Assignments Directly from the Interviewer List

You can add and replace the existing assignments for any interviewer or IVR agent you select in the interviewer list displayed in the top right frame. Both actions can only be performed for one interviewer at a time, not for multiple interviewers.

Adding and replacing multiple assignments is performed using the dedicated dialogs which are opened when the corresponding context menu command is used.

The "Add..." command simply adds the selected surveys to the list of existing assignments, while the "Replace..." command removes ALL the existing assignments for the selected interviewer and replaces them by the selected surveys.

To add a new survey assignment directly from the interviewer list:

1. Display the list of interviewers or IVR agents (go to Viewing the Interviewer List on page 25 for more information).

2. Right-click the required interviewer or IVR agent in the list (multiple selection is not supported), and choose **Add assignment** from the context menu that appears.

   The Add Assignments dialog opens.

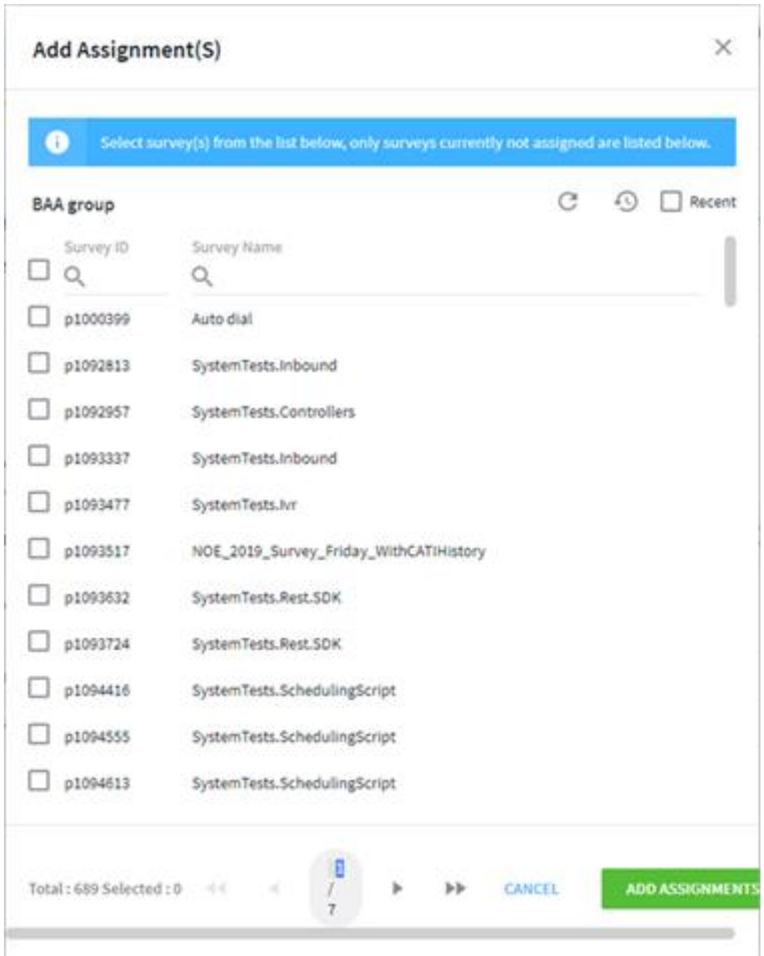


Figure 59 Selecting a survey to assign

Only surveys that are currently not assigned to the selected interviewer or IVR agent are listed in this window.

3. Select the required survey (multiple selection is supported) in the list.

   To simplify the selection process, the system allow you to show only "recent" surveys - these are surveys which contain interviews that had their extended status changed recently (go to Changing the Survey in Call Management on page for more information).

4. Click the **Add Assignments** button to confirm the selection.

   The Add Assignment dialog closes and the selected survey(s) are added to the list of existing assignments for the current interviewer.

To replace an existing assignment directly from the interviewer list:

1. Display the list of interviewers (go to Viewing the Interviewer List on page 25 for more information).

2. Right-click the required interviewer in the list (multiple selection is not supported), and choose **Replace assignment** from the context menu.

   The Replace Assignment dialog opens.

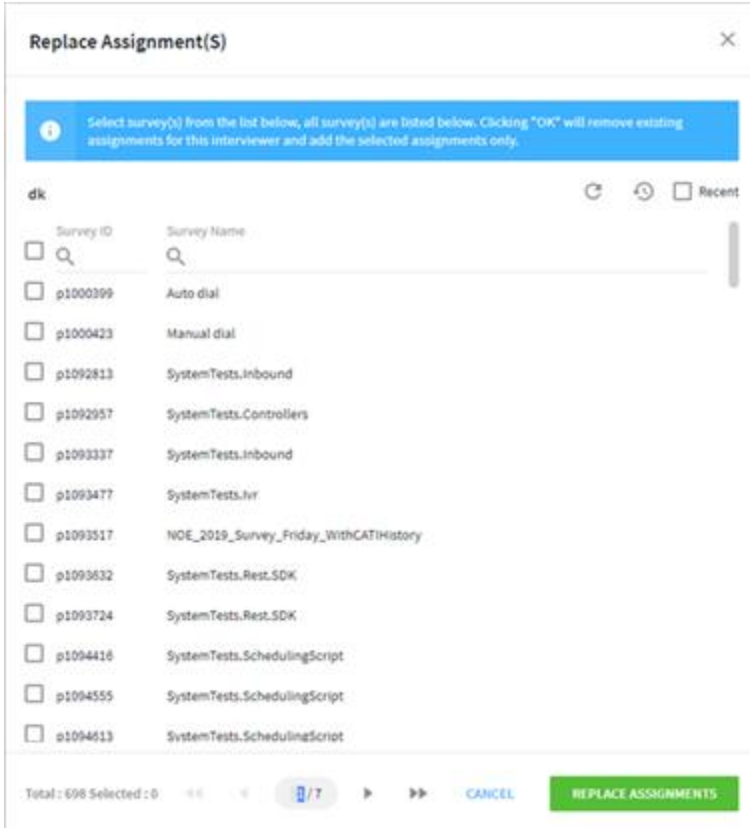


Figure 60 Selecting a survey to replace assignment

Only surveys that are currently not assigned to the selected interviewer or IVR agent are listed in this window.

3. Select the required survey (multiple selection is supported) in the list.
4. Click **Replace Assignments** to confirm the selection.

   The Replace Assignment dialog closes and the selected survey(s) replace the list of existing assignments for the current interviewer.

2.2.9. Importing an Interviewer or IVR Agent List

The interviewer or IVR agent list can be imported from a file, greatly speeding up the work.

An imported list must contain the required property set for each interviewer or IVR agent. It can be created manually, as a single sheet of an Excel workbook. The file must be saved in XLS format.

Each interviewer property set represents one record, which must contain the following fields – login, password, description, group membership. Each row in the sheet is a record, and each column is a field. You can either import the file automatically or assign a specific role to each column manually. The supported properties, or roles, must be created as columns in the sheet, with the column headers as follows:

- **Group** - comma separated list of groups the interviewer should be a member of,
- **Login** - login username for the interviewer or IVR agent (mandatory column),
- **Password** - password for the interviewer or IVR agent,
- **Person description** - description of the interviewer or IVR agent,
- **Choice** - Interviewing mode specified for the interviewer. This column can contain either text or numeric values. The following values are used to indicate the Interviewing mode:

o1 - Automatic

o2 - Manual

o3 - Survey

o4 - Choice.

Only the Login column is mandatory (it should be present in the imported list anyway); the other columns are optional and may not be included in the imported interviewer list.

The column roles must be specified in the first row of the imported file in case the Import the first row option is enabled. Note that the system will reject the file if any "role" name is misspelled.

If you are going to assign the roles manually, or assign them automatically based on the column order, you can omit specifying roles and start with the interviewer description in the first row (see below for details).

The order of the columns in the imported file is important only if (a) you are going to automatically assign column roles based on the column order, (b) the first row in the list does not contain the column names ("roles"), and (c) the Import first row option is disabled. In this case the columns must be in the following order - Group, Login, Password, Person, Description, Task Choice.

The columns can be placed in any order as long as you are either importing the first row containing the column headers or assigning the column roles manually.

	A	B	C	D
1	Group	Login	Password	Person description
2	Group 1	intervr1	nnn123	Interviewer no.1
3	Group 1	intervr2	nnn321	Interviewer no.2
4	Group 1, Group 2	intervr3	nnn231	Interviewer no.3
5				

Figure 61 Example of MS Excel file with the interview list

Note that this example contains the header row with column names – it may not be present in the file you will be importing (i.e. you can create a table without column headers).

To import a file containing the interviewer list:

1. Navigate to the group you want to import the interviewer list into, and display the interviewer list (go to Viewing the Interviewer List on page 25 for more information).

2. Click the **Import** button on the toolbar.

   The Import page opens.

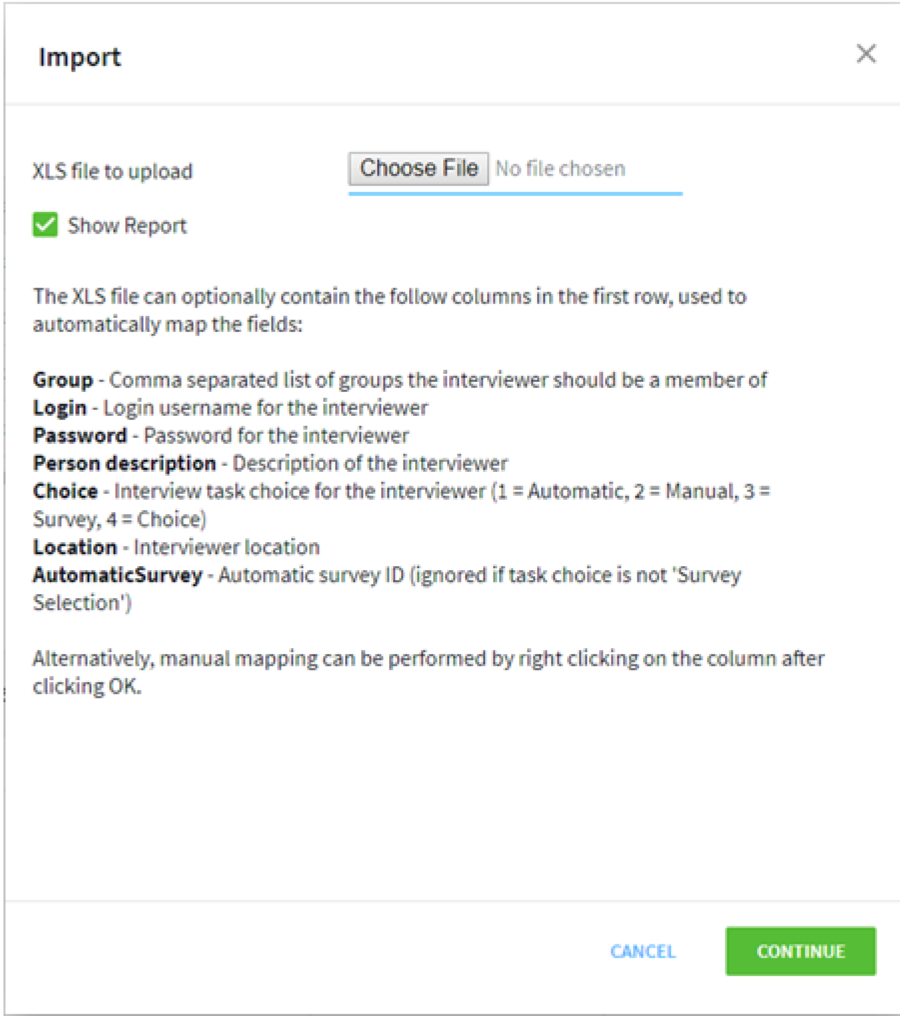


Figure 62 Importing the interviewer list from a file

The Import page provides useful hints - the list of columns which can be used to describe each interviewer in the imported list, and the format of values specified in these columns. The following column names are supported:

oGroup

oLogin

oPassword

oPerson description

oChoice

oLocation

oAutomaticSurvey

3. Check the Show Report box to generate a report of the import results. It will be generated after the import procedure is completed and will contain details of the file contents and the destination group.

4. Click the **Browse** button to navigate to the file you are going to import.

   A standard Windows Open File dialog opens.

5. Select a file and click **Open**.

The Open File dialog closes and the file name and path are displayed in the XLS file to upload field.

6. Click **OK** to start the import procedure.

   The list contained in the imported file is opened in the Import dialog.

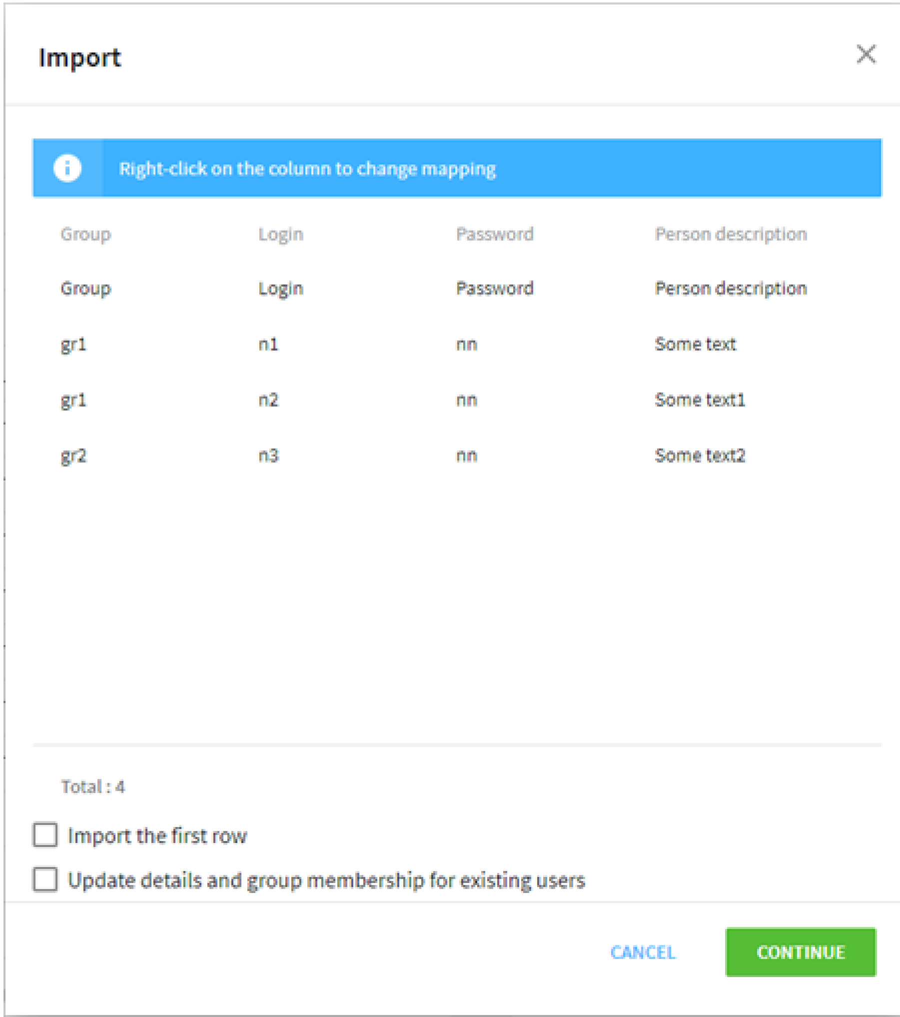


Figure 63 Importing the interviewer list from an MS Excel file

7. Check the **Import the first row** box if you want to import data contained in the first row cells and to use it as Login, Password, Person Description and Task Choice values.

8. The CATI Supervisor can automatically update information for the existing interviewers in cases where it encounters interviewers with names matching those specified in the Name column. To do this check the **Update details and group membership for existing users** box.

9. You can change the column role. To do this right-click the required column cell in the Import dialog and choose **Choose column role** from the context menu. The sub-menu shown below then appears:

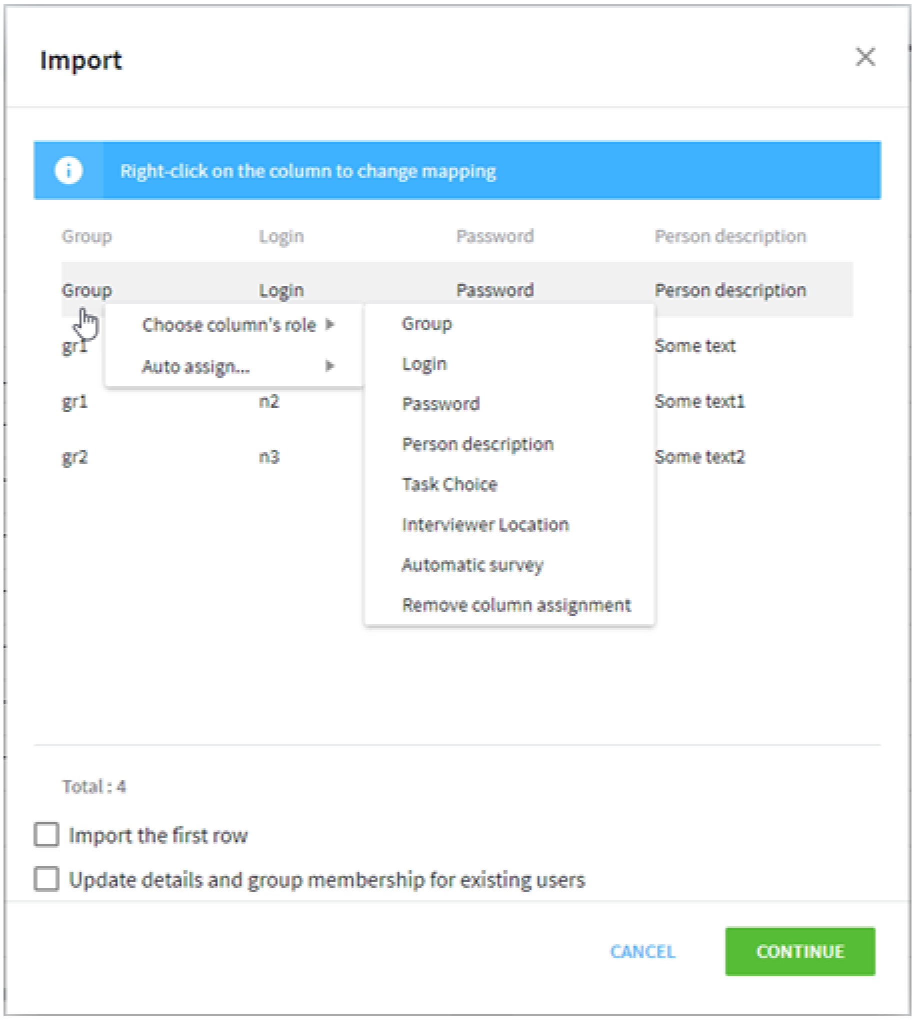


Figure 64 Assigning column roles to the imported table

Choose the desired role from this menu. Repeat the procedure for each column role that requires changing.

Choose "Remove column assignment" to instruct the system to ignore this information during the import. Settings for all interviewers imported from this list will then not contain the "removed" column.

10. Right-click the required column cell in the Import dialog and choose **Auto Assign** to assign column roles automatically based on:

- **Values from the first row** – this option will use values from the header row to assign column roles;
- **Columns order –** this option will create column role assignments automatically. In this case the columns must be in the order - Group, Login, Password, Person Description, Task Choice. Note that incorrect column order here will result in the interviewer properties being mixed. The first row in this case must NOT contain column role names.

11. Finally click **OK** in the Import dialog to start the import procedure.

The Interviewer list will be populated with the interviewers described in the imported list. As soon as new IVR agents are created after the Import operation, the login procedure is started for all of them.

2.2.10. Changing the Interviewing Mode for an Interviewer

As a rule, the interviewing mode is specified for each interviewer at the moment their properties are configured (go to Viewing and Modifying the Interviewer Properties on page 38 for more information). However the supervisor can change the interviewing mode for any existing interviewer without displaying the interviewer properties in the bottom right frame - use the **Change Task Choice** context menu command.

To change the Interviewing mode for an interviewer:

1. Display the Interviewer List (go to Viewing the Interviewer List on page 25 for more information).
2. Right-click the required interviewer in the list and choose **Change Task Choice** from the context menu.

   The Change Task Choice dialog opens.

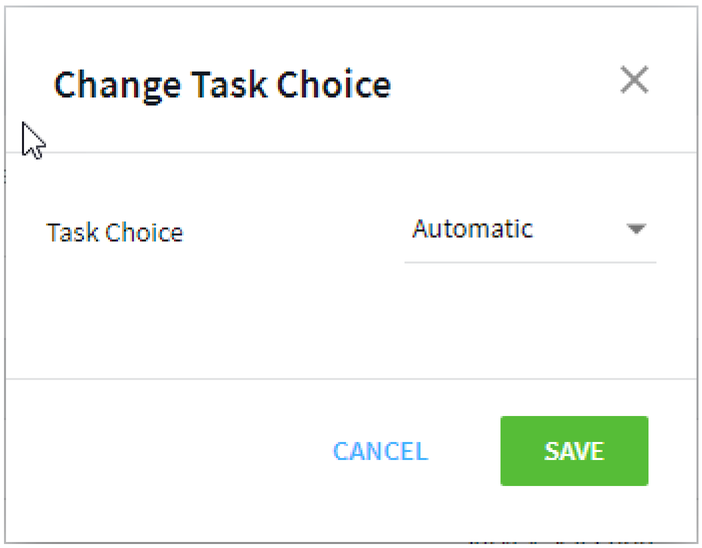


Figure 65 Changing the Interviewing mode for an interviewer from the interviewer list

Note that the layout of the dialog depends on which task choice is selected from the Task Choice drop-down list. When the Automatic or Manual Selection Interviewing modes are chosen the Change Task Choice dialog looks similar to that shown above. When the Survey Selection mode is chosen, the Change Task Choice dialog refreshes and changes to that shown below.

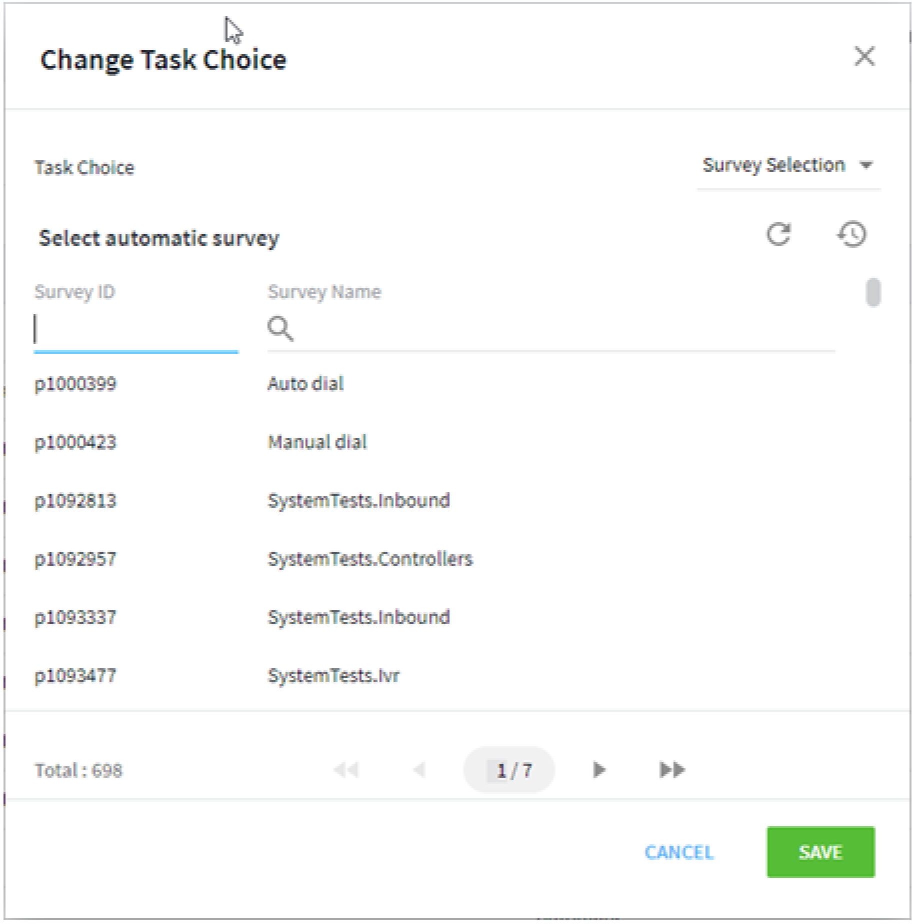


Figure 66 The Change Task Choice page with the Survey Selection mode chosen

3. Select a survey the interviewer will work with to set up this Interviewing mode.

   When the Choice mode is chosen the Change Task Choice dialog refreshes as below.

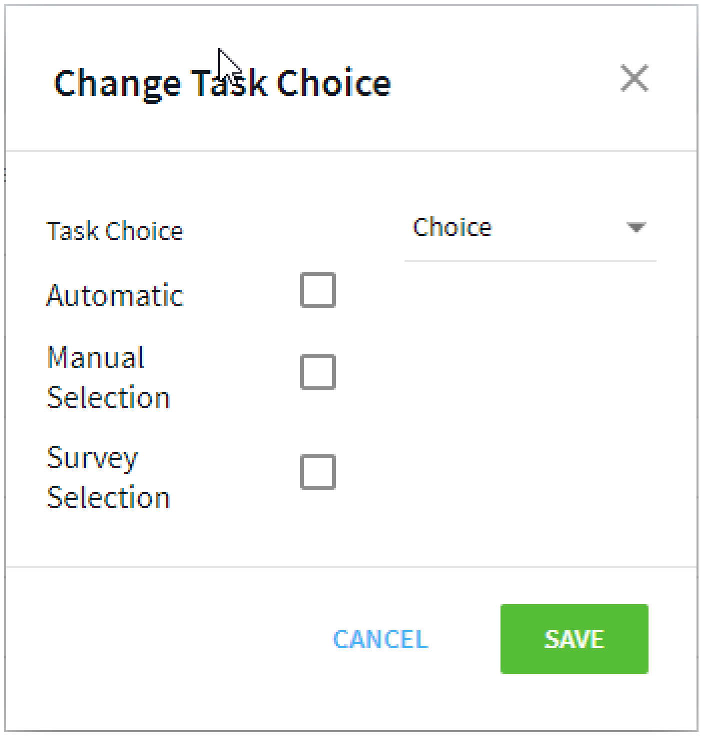


Figure 67 The Change Task Choice page with the Choice mode chosen

4. Check the boxes to make the interviewing modes available for the interviewer when they log into the CATI Interviewer Console.

   Selecting the Automatic and Manual Selection modes does not require any additional configuration. However when the Survey Selection mode is selected you must then configure this option and specify the survey. The dialog then refreshes as below.

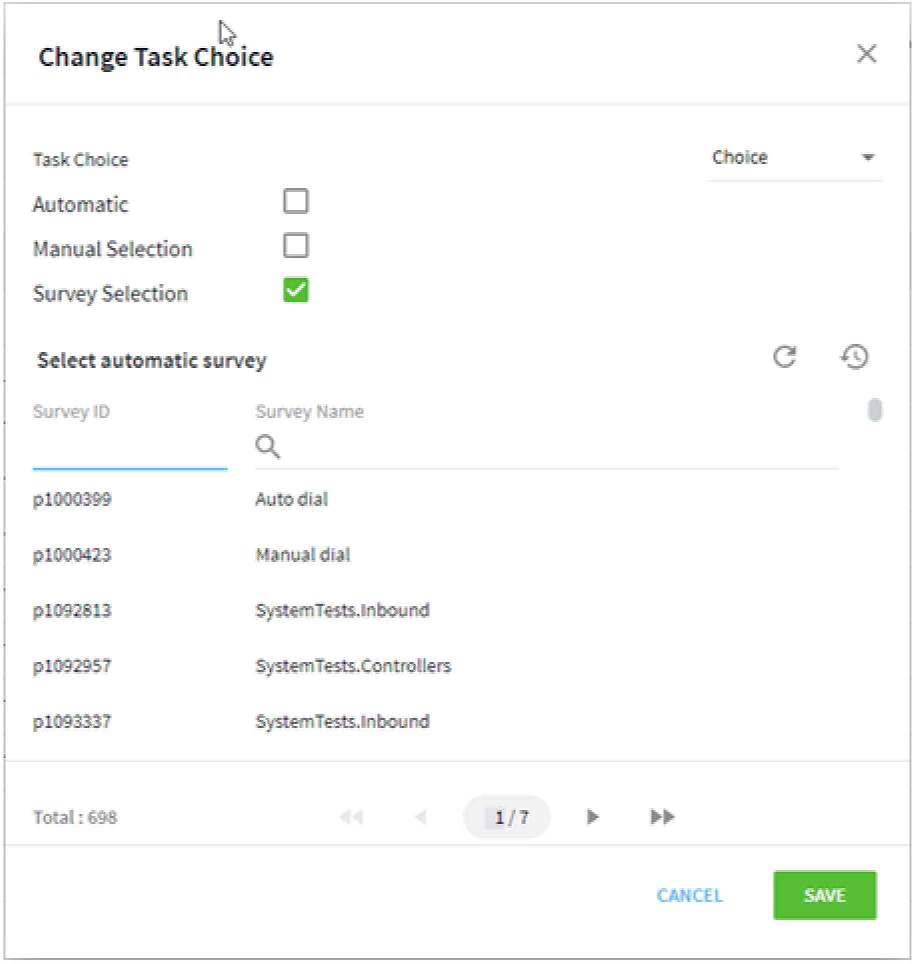


Figure 68 The Change Task Choice dialog with the Choice mode chosen - configuring the Survey Selection mode

5. Select the desired survey.
6. Click **Save**.

2.2.11. Changing a Location for an Interviewer

CATI Interviewers can be assigned a free text Location attribute. This optional attribute will be passed to a connected dialer and it can be used to associate the interviewer with a localized dialer gateway.

Only valid location names (as specified in the dialer gateway configuration settings) can be used here! Consult the relevant documentation or contact the dialer vendor support team to clarify the location name if in doubt.

The attribute is used to identify the location of the interview to the dialer. The assigned value is visible in the interview list in the Location column, and can be used for filtering. Set and edit the Location attribute (go to Viewing and Modifying the Interviewer Properties on page 38 for more information), the New Interviewer dialog (go to Adding and Deleting an Interviewer on page 27 for more information), or using the context menu command for the required interviewer from the interviewer list.

To change a location for an interviewer from the interviewer list:

1. Display the Interviewer List in the top frame (go to Viewing the Interviewer List on page 25 for more information).
2. Select one or more interviewers in the list (you can set the new Location attribute for several interviewers simultaneously).

3. Right-click the selection and choose **Change Location** from the context menu.

   The Change Location dialog opens.

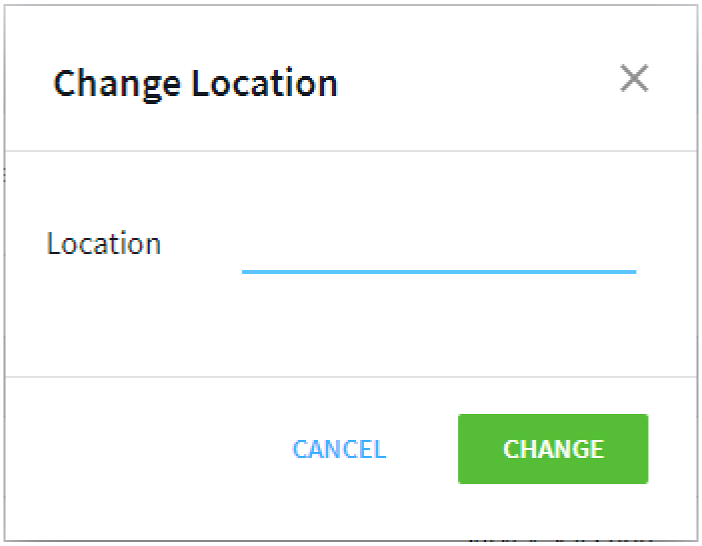


Figure 69 Changing the location attribute

4. Enter the required location in the Location field.

   This is a free text field and combination of any symbols is allowed here.

   If the Location field already contains a value, you can edit it.

5. On completion click **Change**.

   The new value will be displayed in the Location column in the Interviewer list.

2.2.12. Changing a Call Group for an Interviewer

The Call Groups option allows you to apply custom call delivery rules by choosing from a number of pre-configured call sets (go to Configuring the Call Groups on page 341 for more information).

To change a call group for an interviewer:

1. Right-click the required row in the interviewer list (in the top frame), and choose **Change Call Group** from the context menu.

   The Change Call Group page opens.

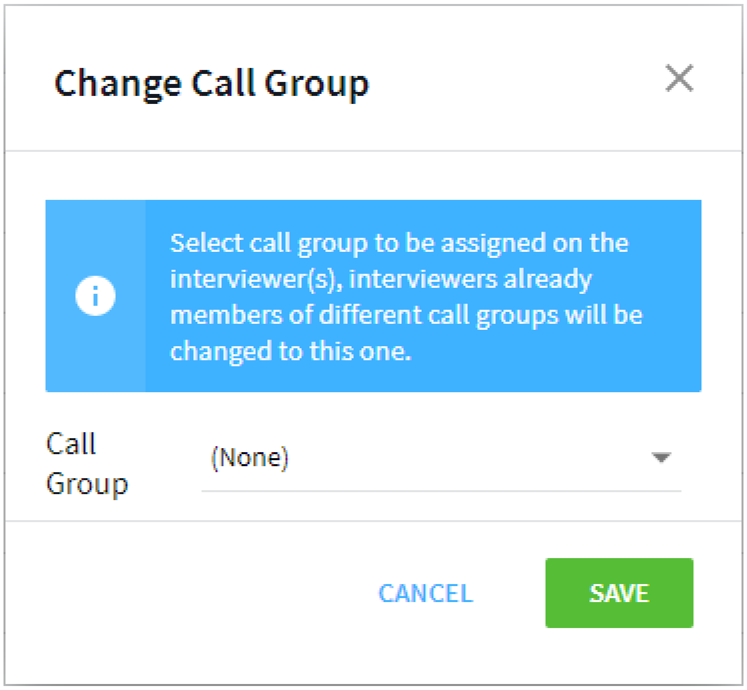


Figure 70 Changing the Call Group for an interviewer

2. Select the required Call Group from the drop-down list, and click **Save** to confirm the selection.

3. Survey Management

Survey management in the CATI module is a complex routine involving monitoring and management of all surveys which are conducted in CATI mode. This includes the definition of survey properties, interview and call management and survey assignment.

For a survey to be started in the CATI mode it must first be appropriately marked in the Forsta Authoring module (refer to the appropriate Authoring manual for details). Then the survey becomes available for managing in the CATI Supervisor module.

Note that availability of a survey to a particular supervisor in CATI Supervisor module is determined by a special permission which is set up in the Authoring module for a selected supervisor. This permission is called "Supervise CATI Project", and it can be found on the Permissions tab (Survey Management section). Refer to the Authoring manual for instructions on enabling and disabling this permission. When the "Supervise CATI Project" is enabled for a specified supervisor, surveys assigned to this supervisor become accessible for them in the CATI Supervisor module. When this permission is disabled, no surveys are available for this supervisor.

By default, all supervisors belonging to the same call center (go to What is a call center in CATI Supervisor on page 186 for more information) that the survey owner belongs to are automatically granted this permission. It can later be removed from selected supervisors.

To start managing surveys and interviews/calls, select the Surveys tab in the Main menu (accessible from the CATI Supervisor main menu).

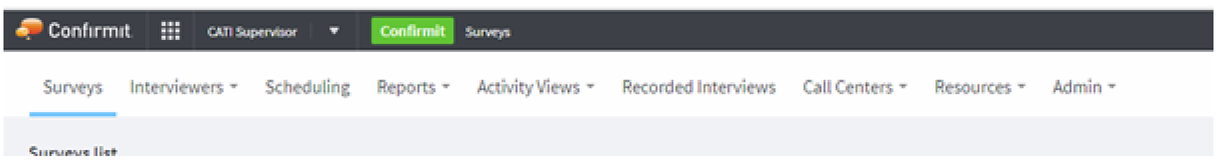


Figure 71 Accessing the Surveys tab in the Main menu

3.1. Viewing the Survey List

To view the survey list:

1. Select the Surveys tab in the Main menu in the left frame.

   The Surveys List opens.

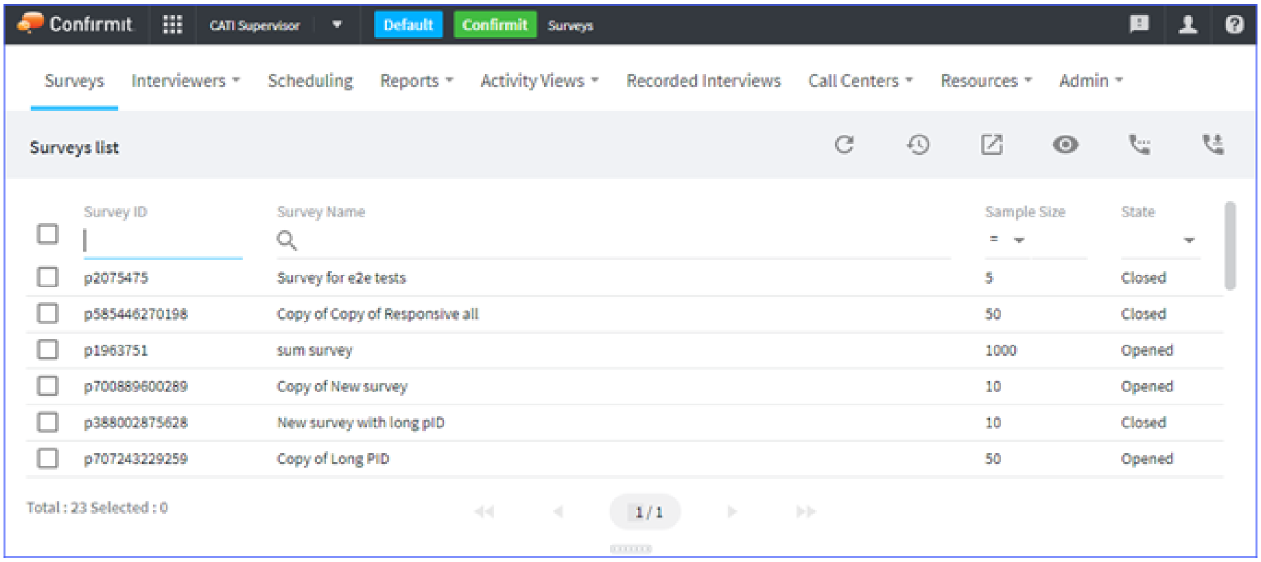


Figure 72 Viewing the survey list

The supervisor can perform the following operations with surveys:

oOpen, close and shutdown a survey;

oView and modify the survey properties;

oView and modify the survey assignment settings;

oManage interviews and calls for the selected survey;

oExport the list of call activity for the selected survey during the selected period

oGenerate a variety of reports for a selected survey;

All the operations are performed by either choosing commands from the shortcut menu opened by right-clicking the grid row containing the appropriate survey, or by clicking buttons on the toolbar above the grid.

When the grid displays the list of surveys the toolbar contains the following button set.

Button	Description	Function
	REFRESH	Updates the survey list
	RESET	Deselects all currently selected surveys at once
	GO TO REVIEWER	Displays the Reviewer module window
	VIEW	Displays the survey properties in the bottom right frame and allows them to be modified

	CALL MANAGEMENT	Displays a list of interviews/calls for the selected survey in a dedicated dialog
	CALL HISTORY EXPORT	Exports the list of call activity for the selected survey during the selected period

3.2. Opening, Closing and Shutting Down a Survey

The Survey State indicates the accessibility of a survey for conducting interviews. It can be **Open** or **Closed**. Interviewing on a survey is only possible if the survey is **Open**. The survey state is changed manually when interviewing process is started or finished. The current survey state is displayed in the State column in the Survey List, accessed by choosing the Surveys tab in the Main menu.

The supervisor can change the survey state as required.

3.2.1. Opening and Closing a Survey

To change the survey state:

1. Go to the **Main menu > Surveys** tab.

   The Surveys List opens.

2. In the list, find the survey you wish to set the sate for and right-click the row.
3. Choose **Open** or **Close** from the context menu as required.

   The survey list is refreshed and the State column shows the current survey state.

When selected, the Close command instructs the system to wait until all interviews currently in progress are finished or suspended then close the survey.

3.2.2. Shutting Down a Survey

There may be a situation when all interviews which are in progress must be terminated. In this case the supervisor can perform the survey shutdown operation. This operation immediately aborts all current interviews regardless of their state, and closes the survey.

To shut down the survey:

1. Right-click the row in the grid in the top right frame, which contains details of the required survey, and choose **View** from the shortcut menu, or click the **View** button on the toolbar.

   The survey information is displayed in the lower-right frame of the browser window.

2. Right-click the grid row containing the parameters of the required survey, and choose **Shutdown** from the context menu.

   The contents of the top-right frame are refreshed and the survey status is set to Closed.

3.3. Operations with Survey Properties

Survey properties comprise a large set of parameters, most of which regulate how the survey is to be conducted. Some survey properties are set up at the moment the survey is added to the CATI module (this operation is performed in the Forsta Authoring module – refer to the appropriate Authoring manual for details). All survey properties can be viewed and some of them can be modified at any time later in the CATI Supervisor module. Any existing survey may require its properties to be modified during the course of interviewing.

Survey properties viewing and modification is performed using the tabbed interface which is displayed in the bottom frame of the CATI Supervisor main window.

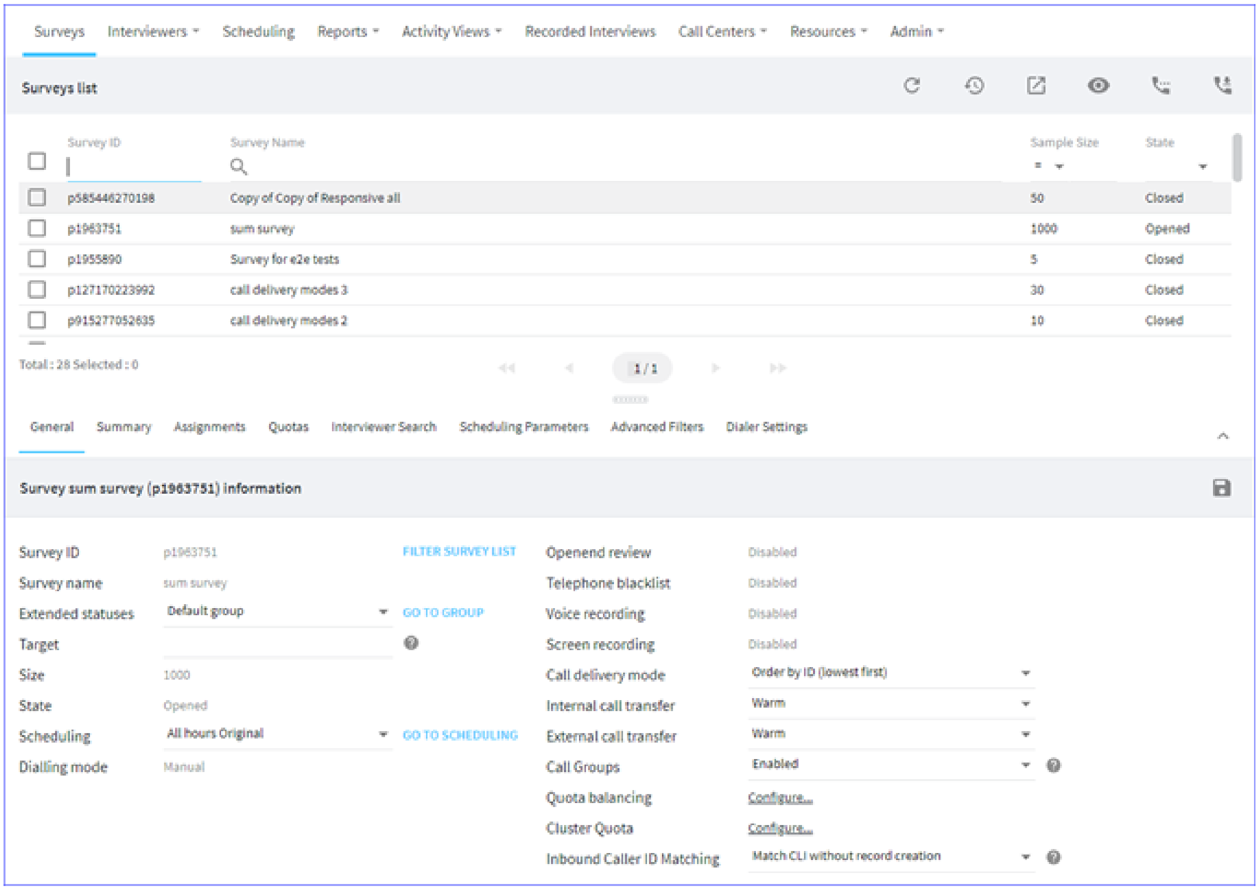


Figure 73 Survey properties displayed in the bottom right frame

If you cannot see all the fields contained in a tab, either resize the bottom frame by dragging its top border up, or use the scroll bar in the right part of the frame to scroll its contents.

On completion click the **Save** button on the toolbar to apply the changes.

3.3.1. Viewing and Modifying a Survey's General Properties

1. Select the Surveys object in the Main menu to display the list of surveys.
2. Right-click the appropriate survey row in the grid and choose **View** from the shortcut menu, or click the **View** button on the toolbar.

   The survey properties are displayed in the bottom frame. This view is called Survey information. Survey properties are grouped using tabs - see the illustration below.

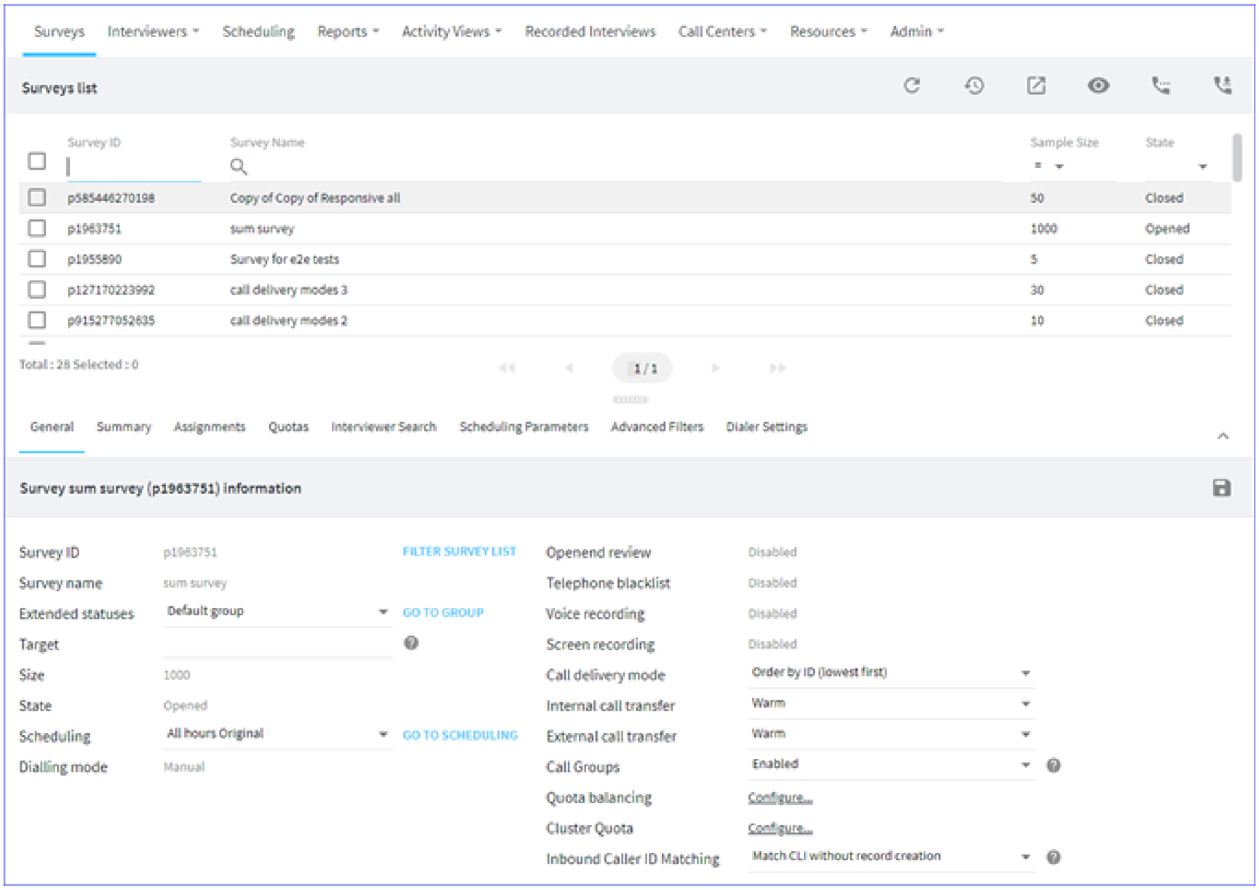


Figure 74 Survey properties - General tab

The following general survey properties are displayed on the General tab.

- The **Survey ID** is the unique project identifier generated and assigned to the project when it is added to the system in the Authoring module. It cannot be changed.
- The **Filter Survey List** link allows you to find the current survey in the survey list. When chosen, this command uses the current Survey ID as a Quick filter value and filters the survey list using this ID. The survey list in the top frame now shows only the current survey - and you can apply commands to this survey without wasting time on searching.
- The **Survey Name** is defined at the time the survey is added to the system. It cannot be redefined using the CATI Supervisor interface. Refer to the appropriate sections of the Authoring manual for the instructions.
- The **Extended Statuses** drop-down list indicates the group of the extended statuses currently used with the selected survey. It allows the user to choose from a number of groups previously created using the Resources object group – see Configuring the Extended Status Groups. Every Extended Status group contains a customized set of Extended Status codes.
- The **Go to...** links next to the **Extended Statuses** and **Scheduling** fields allow you to change directly to the Extended Status Codes group (go to Configuring the Extended Status Groups on page 335 for more information) or Scheduling script (go to Modifying Scheduling Script Settings on page 204 for more information) that is currently selected for this survey.

- The **Target** is the target total number of completed interviews for the survey. This figure is shown in the Target column in the Survey Activity View (go to Monitoring Surveys and Survey-Related Events on page 295 for more information). This is an informational figure - supervisor can define a milestone to compare it against the call count, for example, using the icon to expand information related to extended statuses - see . Or they can configure the Survey List Activity view to show call status count for corresponding extended status (go to Configuring the Survey List Activity View on page 298 for more information).
- The **Size** field displays the current number of sample records.
- The **State** field displays the current survey state.
- The **Scheduling** field indicates which Scheduling script is currently used with the survey. This is where you can assign another script. To do that select one from the drop-down list.
- The dialing mode for the survey (the **Dialing Mode** field) is defined at the time the survey is added to the system. Depending on the dialing mode pre-set for this interviewer, he/she will either receive an interview with a call already connected, or receive a number to be dialed in Preview mode. The dialing mode cannot be redefined using the CATI Supervisor interface. Refer to the appropriate sections of the Authoring manual for the instructions.
- The **Openend Review** field indicates the accessibility of the survey openend fields for editing. This setting is defined at the time the survey is added to the system. It cannot be redefined using the CATI Supervisor interface. Refer to the appropriate sections of the Authoring manual for the instructions.
- The **Telephone Blacklist** option is enabled and disabled in the Authoring module. The Telephone Blacklist indicates whether this option is enabled or disabled for the current survey. If the Telephone Blacklist option is enabled, all numbers included in the Telephone Blacklist on the Telephone Blacklist tab in the Resources tab will not be dialed. See (go to Creating and Managing the Telephone Number Blacklist on page 379 for more information) for detailed information regarding the Blacklist option.
- The **Screen Recording** field indicates whether or not the option of recording actions performed in the Interviewer Console in the course of an interview is enabled. In case the Screen Recording option is enabled, all interviews performed for this survey are recorded as video files\, saved and added to the list of Recorded Interviews automatically. Interview videos added to the Recorded Interviews list become available for deferred monitoring (see (go to Live Call Monitoring, Recordings and Playback in CATI Supervisor on page 324 for more information)).
- The **Voice Recording** field indicates whether or not the option of recording conversations held in the course of an interview is enabled. In case the Voice Recording option is enabled, audio tracks for all interviews performed for this survey are recorded and saved automatically. The audio track for each interview becomes available for reviewing by the supervisor right after the interview is finished (go to Recording and Playing Back Conversations on page 176 for more information). The recorded audio track also becomes available for deferred monitoring alongside the video file corresponding to the same interview - both video and audio tracks are played back in sync (go to Live Call Monitoring, Recordings and Playback in CATI Supervisor on page 324 for more information).

  Note that Voice and Screen Recording options are set up in the Authoring module. Refer to the relevant Authoring manual for instructions on setting up these options. These options cannot be enabled or disabled in CATI Supervisor.
- The **Call delivery mode** option allows choosing the order in which calls are delivered to the interviewer. This setting affects only interviewers working in the Automatic or Survey Selection Interviewing modes (go to Selecting a Survey/Interview on page 252 for more information). Two call delivery modes are available: Order by ID (lowest first) and Random order. When the Order by ID option (default setting) is enabled, CATI interviews will be delivered to interviewers in the order with which they are found in the scheduled calls list (lowest ID first) unless some calls have been given a higher priority.

  oWhen the Random order option is enabled, CATI interviews will be delivered to interviewers in the order with which they are found in the scheduled calls list (lowest ID first) unless some calls have been given a higher priority. This setting will take immediate effect. This setting overrides the default call delivery mode setting which is specified as a company-wide setting for all newly launched surveys by a system administrator.

- The **Internal Call Transfer** and **External Call Transfer** mode options allow for specifying in which mode the interviewer shall perform call transfers. These options are only available when the appropriate system setting is enabled by a system administrator. By default the "Warm" option is selected for both types of call transfer. The "Blind" option is available for the Internal and External modes while the Internal Call Transfer mode can also be set to "Off" - in this case interviewers cannot perform Internal call transfers when working with this survey. The "Warm" call transfer mode assumes the initial interviewer contacts the target interviewer (third party person) prior to transferring the call to them. The "Blind" call transfer mode assumes the initial interviewer is disconnected from the call as soon as the Transfer button is pressed (go to Performing Call Transfers on page 276 for more information).
- The **Call Groups** drop-down list allows defining as set of calls with certain extended statuses that would be delivered to the interviewers according to a certain algorithm before other calls (go to Configuring the Call Groups on page 341 for more information). By default this option is set to "Disabled" which means that calls are delivered in a regular way. The "Enabled" setting will put into effect the Call Group mode for this survey only when the interviewer who is assigned for working in the Call Group mode logs into the Interviewer Console and starts an interview from this survey.

  Note that Call Groups are not supported for surveys with the predictive dial mode enabled.
- The **Quota Balancing** option allows specifying settings regarding automatic tracking and trimming of the quota cell filling. Using these settings the supervisor can enable the system to balance the quota cells filling for the selected quota - the system identifies quota cells with the highest and lowest filling, and starts promoting calls to the quota cells with the lowest filling to even out the inequalities (go to Quota Balancing on page 93 for more information).
- The **Cluster Quota** option allows limiting the number of active calls being interviewed at any one time in a particular quota cell to the threshold value specified (go to Quota Clustering on page 98 for more information).
- **Inbound Caller ID matching** - This setting specifies how the system will behave when receiving an inbound call. There are three possible behavior types:

  o Attempt to match inbound CLI with existing sample records (do not create new records when no matches are found)

  oAttempt to match inbound CLI with existing sample records (create a new record if no match is found)

  oDo not attempt to match inbound CLI with existing sample records (always create a new record)

Note: A 'CLI' is the number of the inbound caller (Caller ID). The system will attempt to match this against values contained in the "TelephoneNumber" field, which is contained in the sample record.

3. On completion, click the **Save** button  on the toolbar to apply the changes.

   If you attempt to leave the page while it holds unsaved changes, a warming is displayed.

3.3.2. Viewing the Sample Information for Each Extended Status

The Summary tab of the Survey View (bottom frame) contains information regarding the sample data available for each extended status.

To view the sample information:

1. Go to **Surveys** in the Main menu to show the list of surveys.
2. Double-click the required survey in the grid.

   The survey details are displayed in the bottom frame.
3. Go to the **Summary** tab to show the number of interviews for each status as of the current moment.

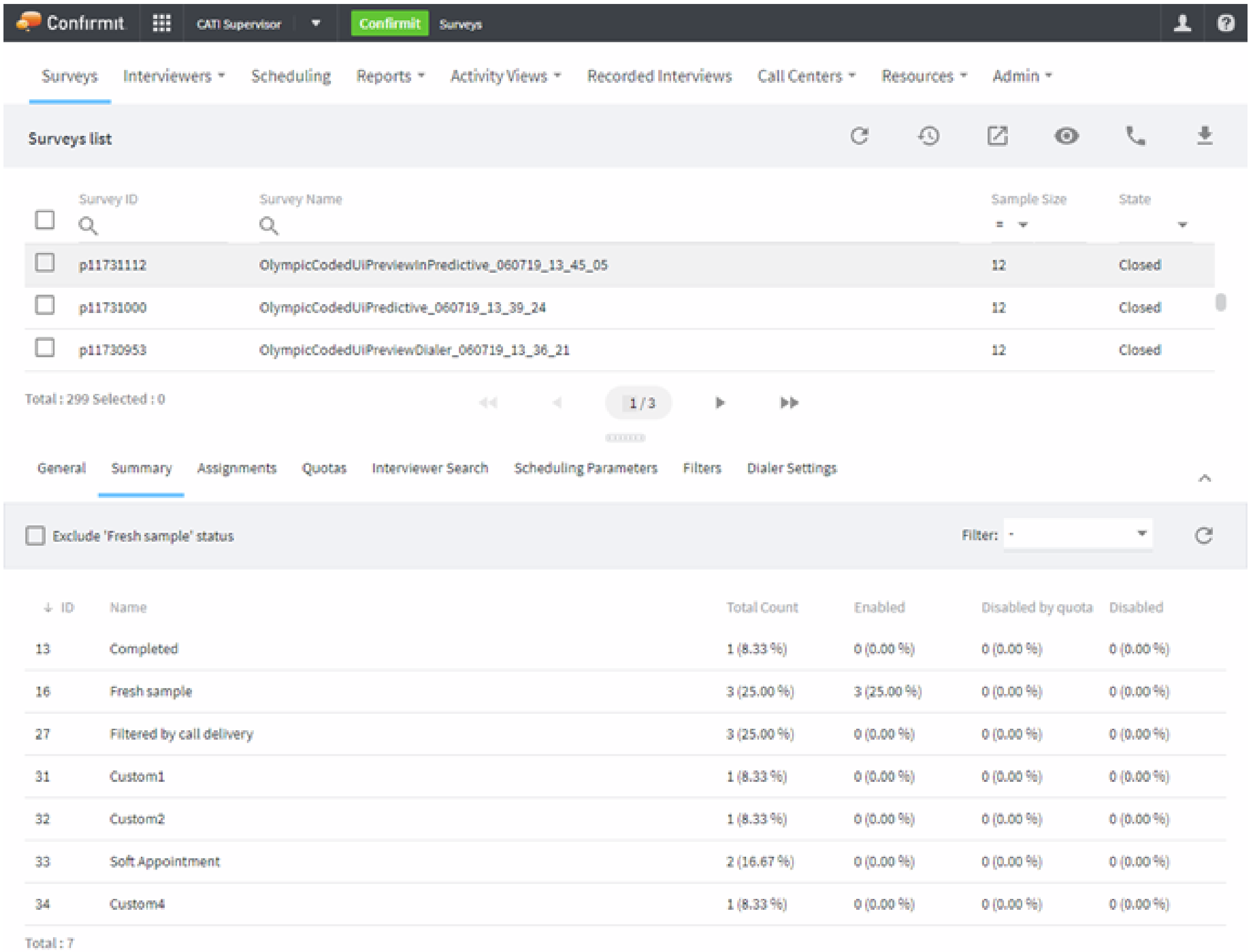


Figure 75 Survey properties - Summary tab

The grid in the Summary tab lists all extended statuses that are currently assigned to survey interviews. Extended statuses are presented as rows. For each extended status the grid provides the following information shown in columns:

o**ID** – Extended Status ID;

o**Name** – Extended Status name;

o**Total Count** – number of interviews with that Extended Status;

o**Enabled** - the number of interviews that are both "Scheduled" and "Enabled" and have that Extended Status;

o**Disabled by quota** - the number of interviews which were automatically moved into "Disabled" state by the system as a result of FCD operation (when the related quota limit was exceeded - these interviews are marked with yellow in Call Management);

o**Disabled** - the number of manually disabled interviews (these interviews are marked with red in Call Management).

Each value is accompanied by a percentage count shown in brackets. This is the percentage of such interviews with respect to the total number of interviews in the sample.

4. To focus on the records which have been attempted at least once, the supervisor can hide from view all interviews with the "Fresh Sample" status. To do this, check the "Exclude "Fresh Sample" status" box. Note that this will change the percentage values for all displayed statuses; all calls with the "Fresh Sample" status will be excluded from all calculations and the percentage values will not take them into account.
5. The supervisor can apply a filter from the list of available filters. To do this, select one from the Filter drop-down list. The list will then display only interviews matching the selected filter criteria. Note that in this case the percentage values will remain in respect of the total number of interviews in the sample.
6. The supervisor can at any time refresh the list manually by pressing the **Refresh** button located above the grid.

3.3.3. Viewing and Modifying the Survey Assignments

You as the Supervisor, can assign users responsible for performing interviews within a specific survey or assign certain surveys for specific persons.

There are two ways you can view and modify the survey assignments; you can use the procedure described below, or you can assign persons and groups directly to the survey you select in the Survey List (go to Adding and Replacing Assignments from the List of Surveys on page 179 for more information).

To view and modify the survey assignments using the Assignments tab:

1. Display the list of surveys in the top right frame by selecting the **Surveys** object in the left Navigation frame.
2. Right-click the row in the grid in the top right frame, which contains details of the required survey, and choose **Properties** from the shortcut menu, or click the **View** button on the toolbar.

   The survey properties are displayed in the bottom-right frame of the browser window.
3. Go to the **Assignments** tab.

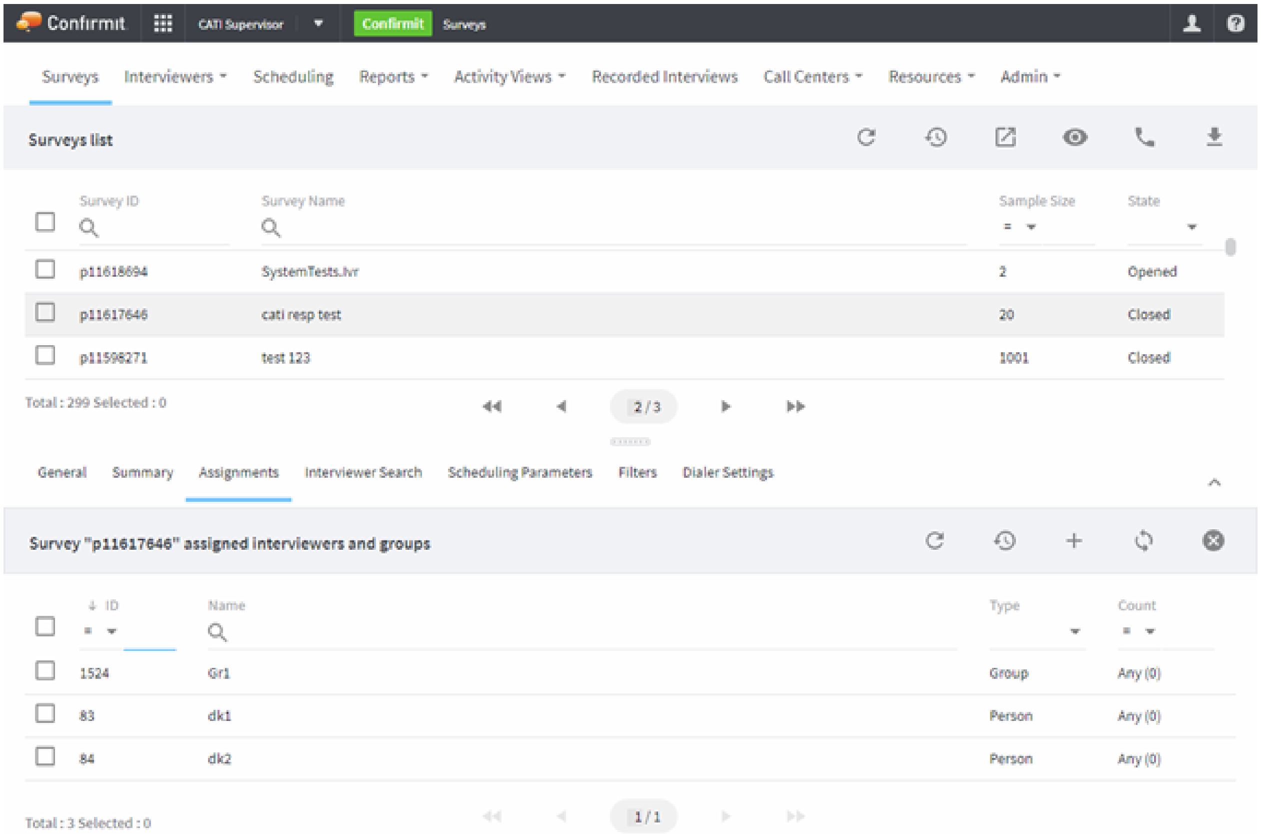


Figure 76 Survey properties - Assignments tab

Any existing survey assignments are displayed in the grid, otherwise the grid appears empty. The Name column shows a person or a group name, the Type column indicates whether this item represents a person or a group, and the Count column shows the number of particular interviews (within the current survey), which are assigned to this particular person or group. The "**Any**" value in this column means that this person/group is assigned virtually to any interview that would be conducted within the current survey.

Note: When a call is disabled it is not shown in the Count column.

4. Select the required persons/groups by checking boxes in the first grid column, or click the required items while holding down the **Ctrl** or **Shift** keys on the keyboard to create a multiple selection.

   Click the **Reset** button to clear the selection.

5. Click the **De-assign** button on the toolbar or right-click any row in the grid and choose **Deassign selected...** to de-assign the selected persons/groups.

   The selected persons/groups are removed from the list.

You can also assign persons/groups to this survey. To do this:

1. Click the **New** button on the Assignments tab toolbar.

   The Add Assignments dialog opens.

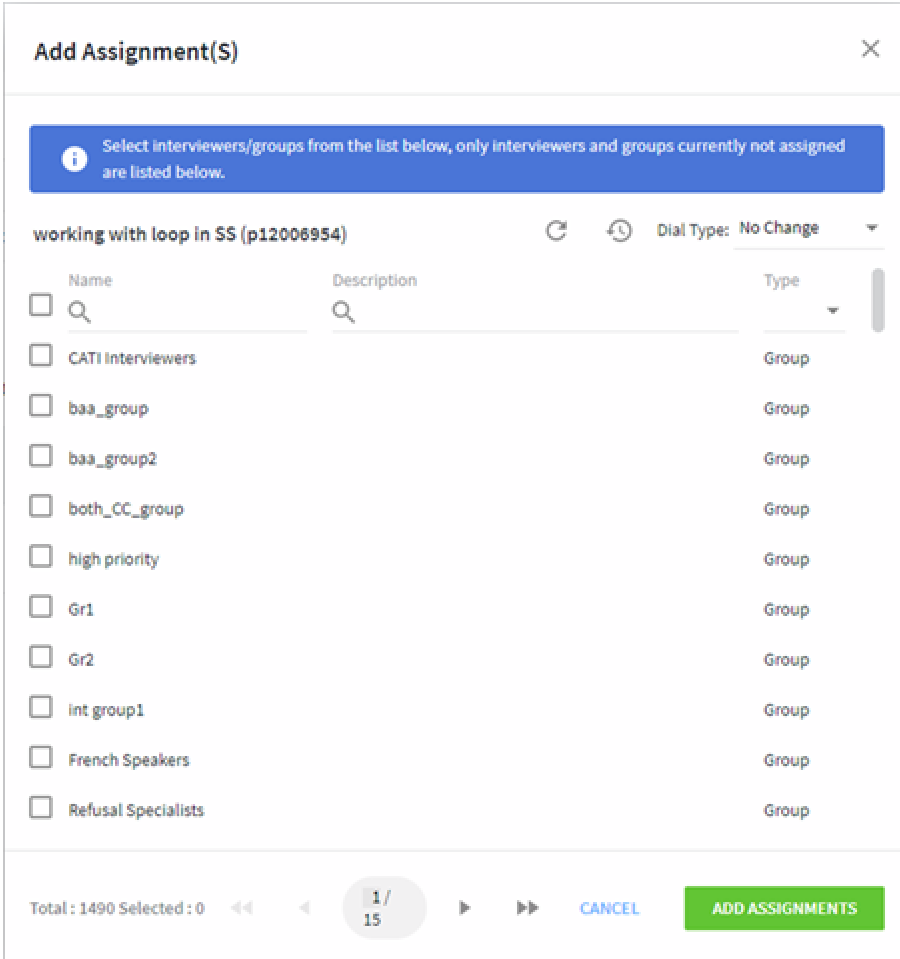


Figure 77 Example of the Add Assignments dialog

This contains a list of persons/groups that are available to be assigned to the survey, along with a description and an indication of whether the item represents a person or a group.

The **Dial Type** drop-down list located above the grid allows you to specify which dial type is allowed for the interviewer when they work with a survey that is run in the TCPA Compliance mode (go to Adding and Deleting an Interviewer on page 27 for more information).

2. Check a box in front of the required item and click **Add Assignments** in the bottom of the window to add a new assignment.

   The Assignments tab refreshes, and the selected persons/groups appear in the list of the assigned person/groups.

You can replace all existing assignments for the current survey while creating new assignments. To do this:

1. Click the **Replace** button  on the Assignments tab toolbar.

   The replace assignments dialog opens.

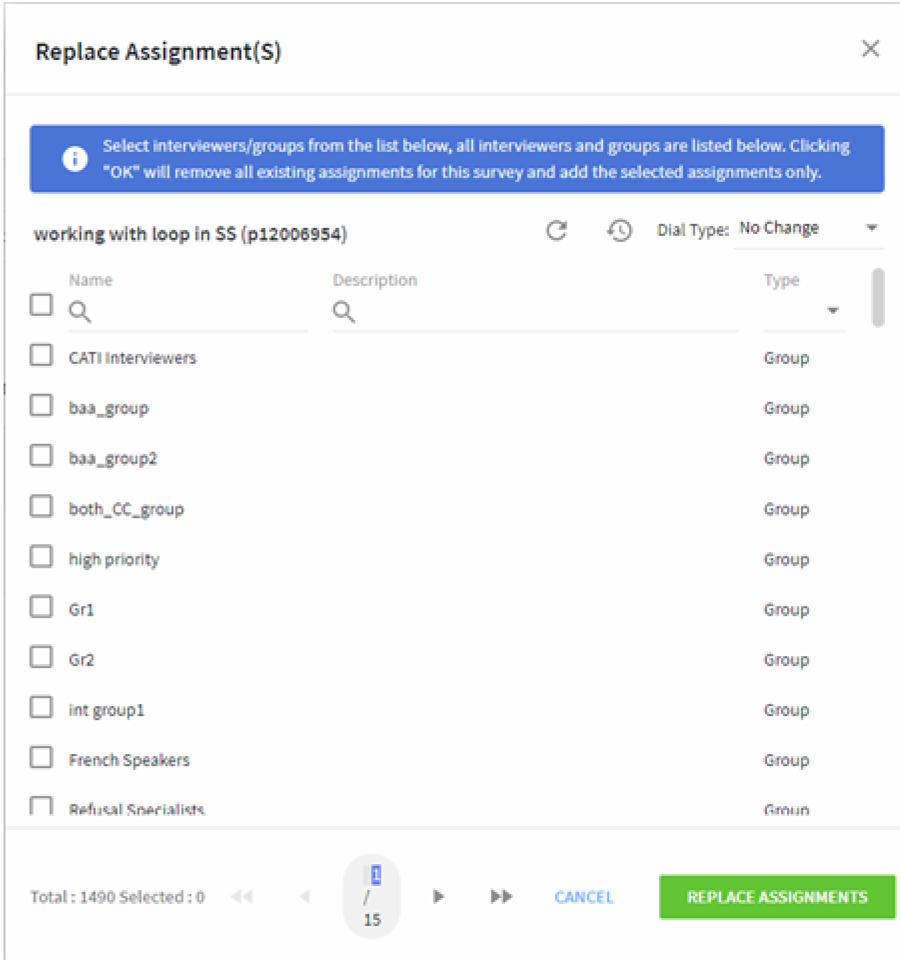


Figure 78 Replace survey assignments dialog

This window contains a list of all persons/groups that are available to be assigned to the survey, including those already assigned to the survey. The table displays person/group descriptions and an indication of whether the item represents a person or a group.

2. Check a box in front of the required item and click **Replace Assignments** in the bottom of the window.

   A warning message is displayed asking you to confirm the assignment replacement action.

3. Click **OK** to confirm replacement.

   The Assignments tab refreshes and the selected persons/groups appear in the list of the assigned person/groups in place of the previous assignment. This action cannot be reverted.

Note that you can also add or replace assignments directly from the survey list in the top frame with the use of the context menu commands (go to Adding and Replacing Assignments from the List of Surveys on page 179 for more information).

3.3.4. Viewing and Modifying Survey Quota Settings

Quotas are specified and enabled for use with CATI surveys in the Forsta Professional Authoring application. Refer to the separate Professional Authoring user guide for further details.

The supervisor can view the list of quotas defined for the selected survey, and perform a set of actions which will affect only interviews/calls that fall into certain quota cells. The set of actions available from the Quotas view tab include:

- Changing the limit for selected quota cell(s) (go to Changing Quota Cell Limits on page 84 for more information).
- Activating interviews/calls which fall into specific quota cells (go to Activating Interviews which Fall into Specific Quota Cells on page 84 for more information).
- Changing the call priority for interviews/calls which fall into specific quota cells (go to Changing Priority of Calls which Fall into Specific Quota Cells on page 86 for more information).
- Enabling interviews/calls which fall into specific quota cells (go to Enabling Calls which Fall into Specific Quota Cells on page 86 for more information).
- Disabling interviews/calls which fall into specific quota cells (go to Disabling Calls which Fall into Specific Quota Cells on page 87 for more information).
- Open/close quota cells (go to Opening and Closing Quota Cells on page 88 for more information).
- Set up Balancing Priority for quota cells (go to Setting up a Balancing Priority for Quota Cells on page 89 for more information).

The Activate (go to Activating an Interview/call on page 143 for more information), Disable and Enable (go to Disabling and Enabling Calls on page 131 for more information) actions are applied only to interviews/calls falling into specific quota cells, and in the Quotas tab they are executed through context menu commands.

Remember that properties of the disabled calls can be changed (extended status, priority etc.), but disabled calls ARE NEVER DELIVERED to the interviewers until they are enabled.

The Quotas view tab also allows setting up an "Action filter" based on the questions defined for a particular quota. It sets forth the condition that determines which particular interviews would be activated, enabled, or disabled (go to Setting Up the Action Filter on page 90 for more information).

Remember that you can set up quota balancing (for one quota per survey) that will help to fill the quota cells for the selected quota more evenly (go to Quota Balancing on page 93 for more information).

Note that ALL context menu commands accessible in Quotas view are only executed for calls/interviews where data is known for the questions that make up that quota cell. If the data is not yet captured, the cell is not known and cannot be used as a filter to determine calls to which the action should be applied. A similar rule is used with the Call Counts counter.

To view and modify survey quota settings:

1. Display the list of surveys in the top frame by selecting **Surveys** in the Main menu.
2. Right-click the Survey List row for the desired survey and choose **View** from the shortcut menu, or select a survey row and click the **View** button in the top frame toolbar.

   The survey properties are displayed in the bottom frame.
3. Change to the **Quotas** tab.

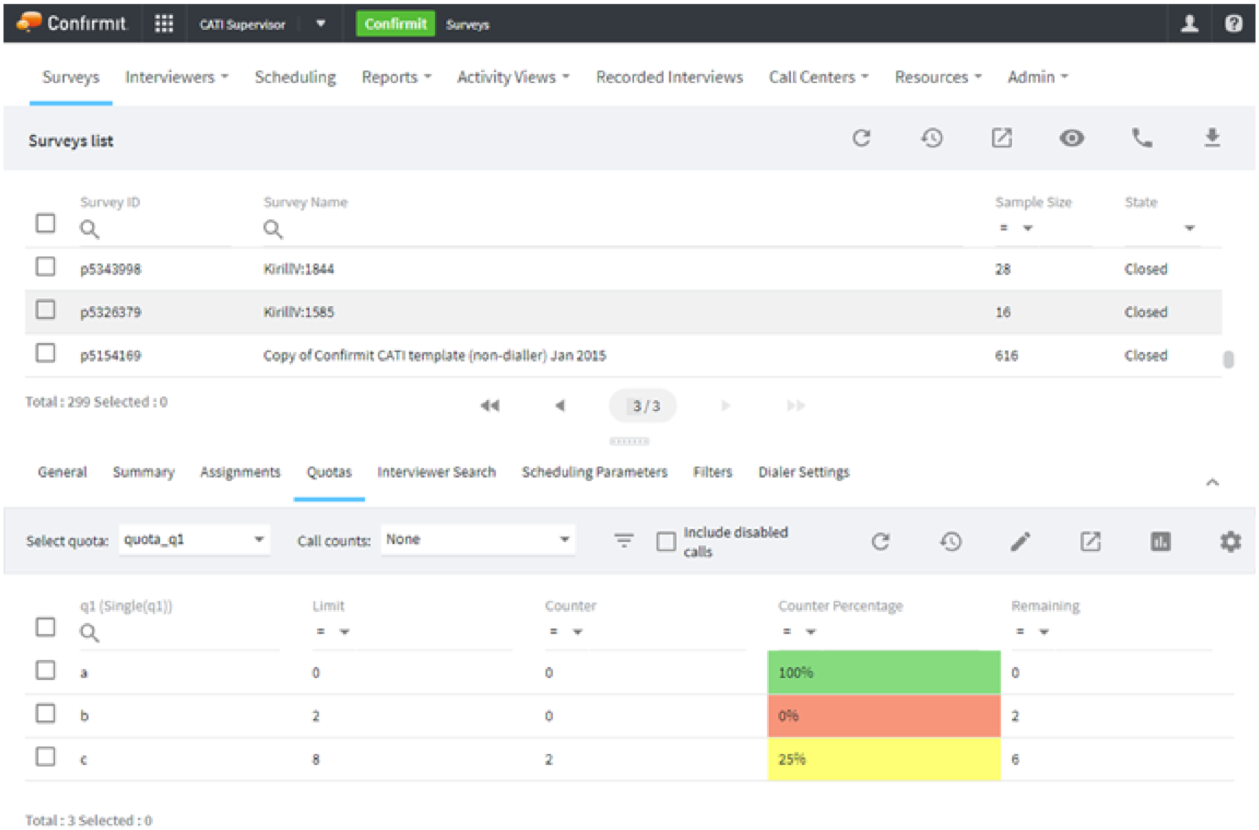


Figure 79 Survey properties - Quotas tab

4. To view the settings for a particular quota, select the required quota from the Select quota drop-down list above the quota list.

   The grid refreshes and displays settings for all quota cells defined for this quota. Each quota cell is displayed as a grid row (one quota definition can include a number of quota cells). For each quota cell the grid shows in columns:

   - **Question** (or a number of questions in case of a compound quota, one question per column) which the quota is based on,
   - **Limit** (the threshold number of calls which should not be exceeded),
   - **Counter** (the current number of completed calls for this target),
   - **Counter Percentage** (the current level of achieved quota, expressed as a percentage)
   - **Remaining** (the number of calls which can still be made for this target),
   - **In Progress** (the number of calls that are in progress at the moment. The In Progress column is displayed only in case an optimistic quota limit was specified when the Quota was set up in the Authoring module),
   - **Optimistic total limit** (the Optimistic Total Limit column is displayed only in case an optimistic quota limit was specified when the Quota was set up in the Authoring module)
   - You can optionally display an additional "**Call counts** column (go to The Call counts column on page 80 for more information).
   - You can set up **Balancing Priority** for quota cells (go to Setting up a Balancing Priority for Quota Cells on page 89 for more information).

You can display the quota information and settings in a separate window. This is a convenient way to compare different quotas, for the same or different surveys. To open a quota view in a separate window, select the required quota using the Select Quota drop down list in the bottom right frame, then click the **Open selected quota in a new window** button .

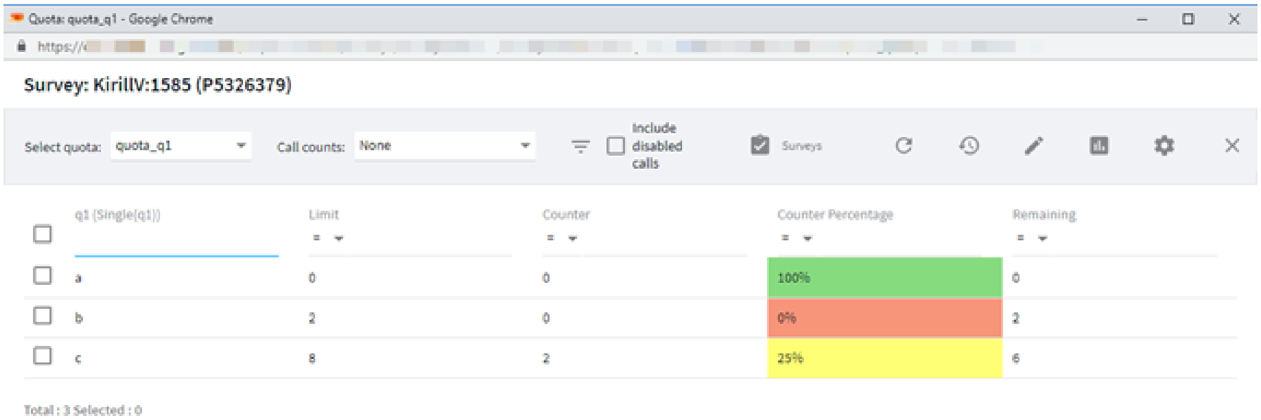
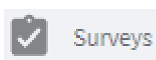


Figure 80 Quota opened in a separate window

The **Surveys** button  allows you to switch focus to quotas from a different survey.

The Select Survey dialog

1. Click the **Select Survey** button.

   The Select Survey dialog opens. Use this dialog to select a different survey from which to view the quota details.

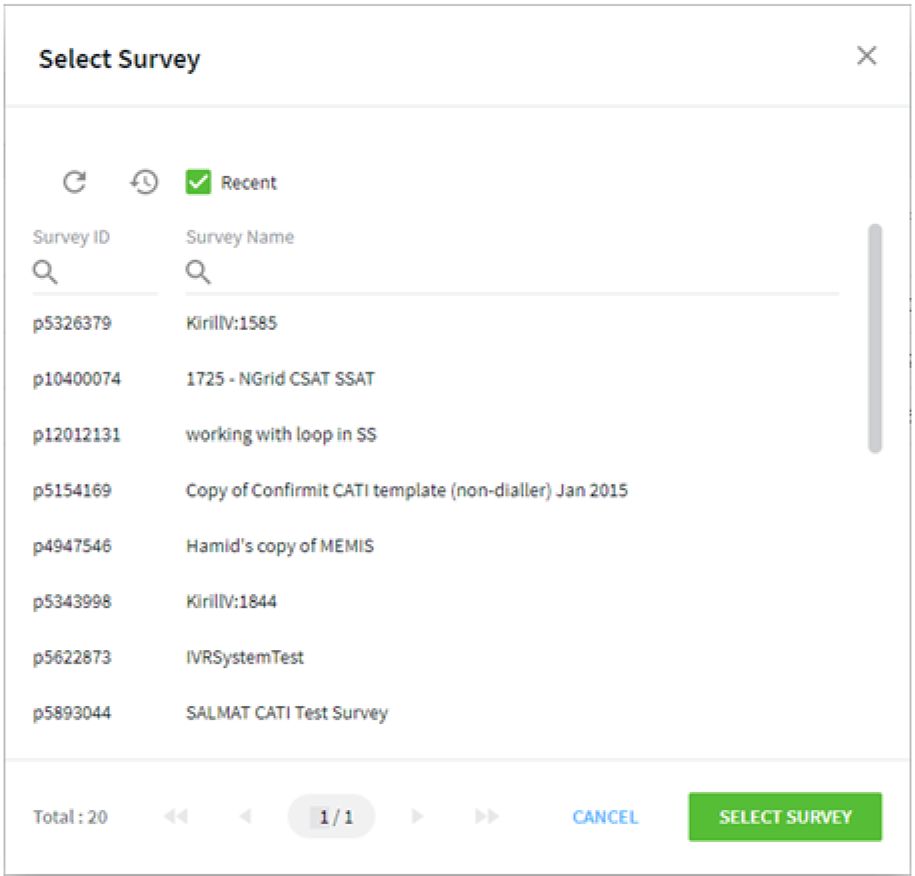


Figure 81 Selecting a survey in the Select survey window

To simplify the process of selecting a survey, the system only lists "recent" surveys by default. These are surveys which contain interviews that have had their extended status changed recently. When the Recent box is checked, a maximum of twenty interviews is listed. When the Recent box is cleared, all surveys are listed.

Note: Any survey can be used with different call centers. The survey interviews may therefore change their extended status in one call center while they retains the original value in another call center. In such cases, the extended status change is sensed only in the call center where it took place; in other call centers that use this survey the change will not be applied and the survey containing the interview will not be treated as "recent".

The Call counts column

The "Call counts" column is a configurable counter which shows the number of interviews/calls for each quota cell filtered using one of the predefined conditions. There are four filters available:

oDaily Achieved Counters.

oScheduled Calls.

oScheduled Calls with Specific Statuses.

oInterviews with Specific Statuses.

And you can also hide the Call counts column - select **None**.

The Call Counts are available only for calls/interviews where the data is known for the questions that make up that quota cell. If the data is not yet captured the cell is not known and is not included in the counts.

Disabled interviews/calls are not included in the Call Counts by default. To include disabled calls in the count, activate the additional filtering condition by checking the **Include disabled calls** option. This option is displayed to the right of the Call counts drop-down box, only when you choose the **Scheduled calls** or **Scheduled calls with specific statuses** filter.

By default, the Call counts column is hidden and the Call counts drop-down box displays the None option. To view the column, choose one of the available filters in the Call counts drop-down box.

If any changes are not applied automatically (the Quotas grid does not refresh after you make changes), click the **Refresh** button on the Quotas tab toolbar to update the frame.

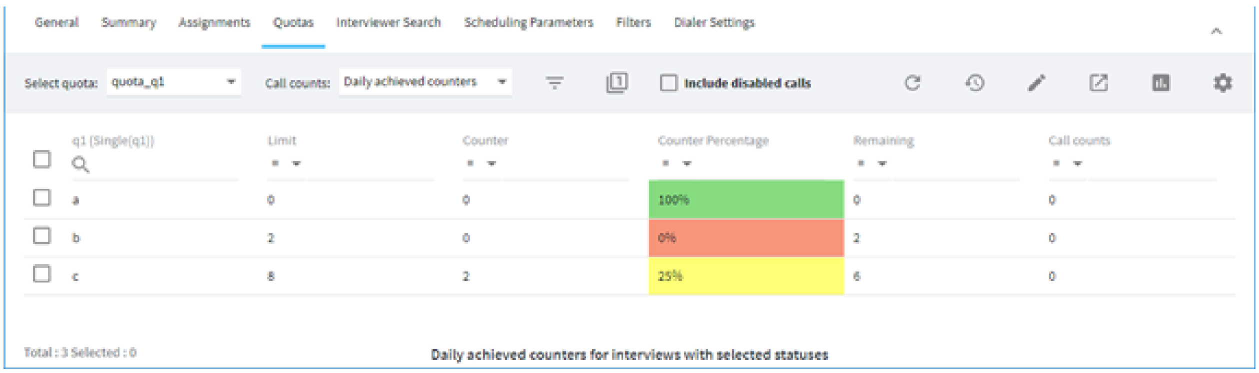


Figure 82 Quotas tab displaying the Call counts column

To reconfigure a filter by selecting specific statuses:

1. Click the **Select Statuses** button.

   This button is displayed when either the **Scheduled Calls with Specific Statuses** or the **Interviews with Specific Statuses** filters are chosen in the Call counts drop-down list.

2. Check the appropriate statuses in the scrollable list that appears - see the image below.

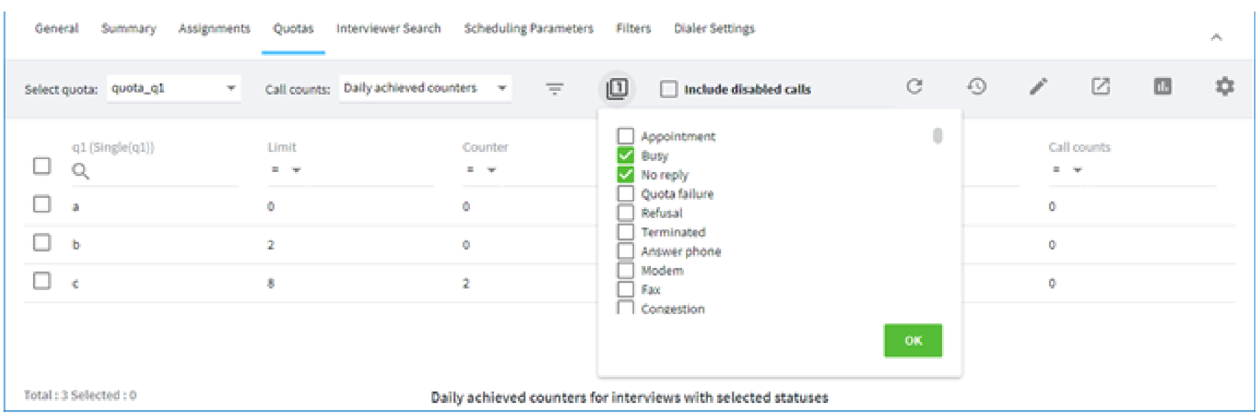


Figure 83 Selecting statuses to configure the filter for the Call counts counter

3. When all the required statuses are selected, click **OK** to apply the filter condition.

   If the grid is not refreshed automatically, click the **Refresh** button to update the Call counts column.

- The Daily Achieved counter shows the number of interviews which were assigned the Completed extended status during the current day starting from 00:00:00 and ending at 23:59:59.

- The Call counts column shows the number of calls made for each quota cell and matching the criteria selected in the Call counts drop-down list.
- The status bar in the bottom frame displays the following information:

  oOn the left side - the total number of quota cells defined for the selected quota, and the number of currently selected quota cells;

  oOn the right side - the total number of interviews/calls matching the criteria chosen for the Call counts column.

  To hide the Call counts column, choose **None** from the Call counts drop-down box and click the **Refresh** button.

You can display all currently defined quotas in a single view whether or not the quotas are shown in a separate window (see above).

Displaying all quotas in a single view on the Quotas tab;

1. Choose **All quotas** from the Select quota drop-down list.

   The image below shows three quotas displayed simultaneously on the Quotas tab.

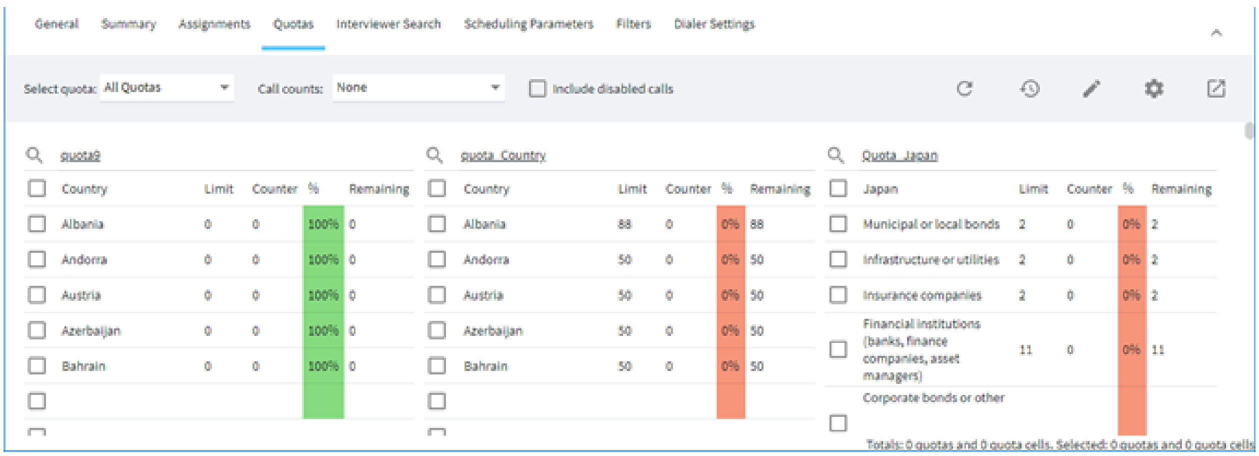


Figure 84   All quotas displayed in a single view on the Quotas tab

   When the "All quotas" view is enabled, quotas are displayed in blocks which are placed as specified in the Properties dialog (see below).

2. Click the **Properties** button  on the Quotas tab toolbar.

   The Properties dialog opens. This provides controls to configure how quotas are displayed in the Quotas tab (see below).

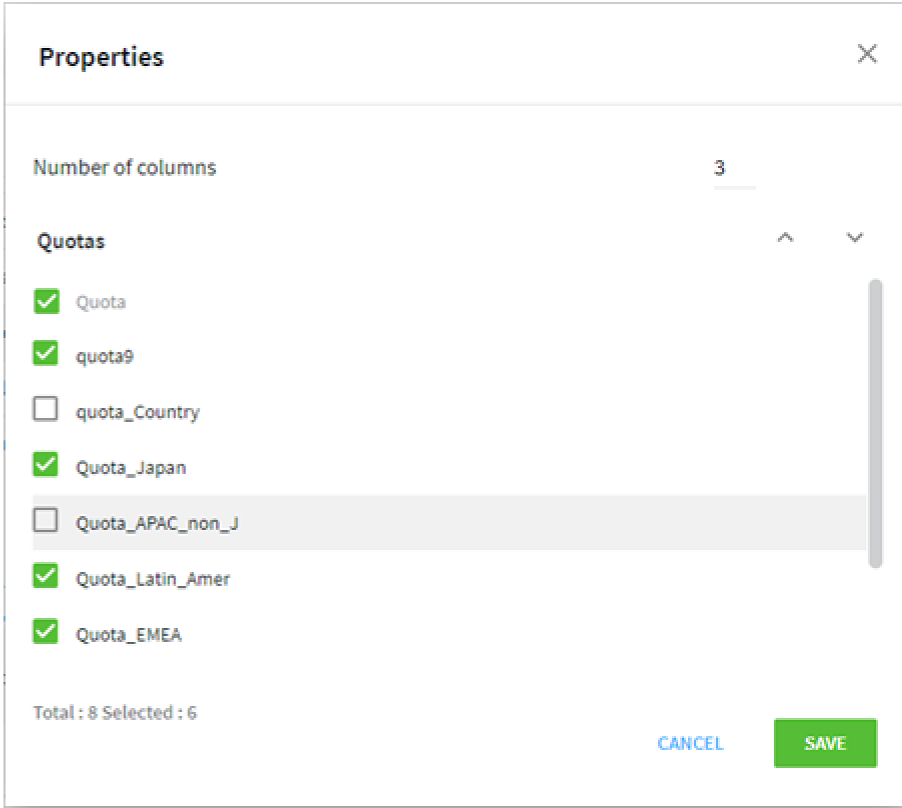


Figure 85 The Properties dialog for the Quotas tab

Toggle the check box next to a quota name to hide or show the corresponding quota data in the quota view.

Click the **Reset** button to undo any check/clear action(s) you have performed to that setting. Note that once you save the changes or move to another setting, you cannot reset.

The Properties dialog allows you to specify the order in which quotas are displayed in the Quotas tab.

The Number of columns field regulates how many columns are shown in the grid in the Quotas tab or in the separate Quotas window. One column corresponds to one quota. To edit the setting , type the required number into this field. The number of rows shown depends on the number of quotas marked as visible in the Properties dialog. For example, if you mark 6 quotas as visible, and you enter 3 in the Number of columns field and save the changes, when you choose the "All quotas" view from the Select quota drop-down list the selected quotas will be displayed in 3 columns and 2 rows (6 quotas divided by 3 columns) (go to All quotas displayed in a single view on the Quotas tab on page 82 for more information). The figure above shows only the first row (including 3 quotas); scroll down to display the second row and the next three quotas.

To change the order in which quotas are displayed in the grid:

1. Select the quota by clicking its name in the list in the Properties tab.
2. Move the selected quota closer to the start by pressing the **Up** button ^ or closer to the end by pressing the **Down** button ⌄.

- Click the **Refresh** button ↻ in the frame toolbar to check the latest values for ALL counters.
- All cells of the Counter Percentage column are color coded: the background color of each cell corresponds to a defined value range. Digits are displayed followed by the percent sign. The following colors are used:

  o Red for values in the range 0 to 10%.

  oYellow for values in the range 11% and up to 90%.

o Green for values greater than 90%.

- When a calculated value exceeds 100%, the Count Percentage column will display "100%" instead of the real calculated figure. If a limit for a quota is not set up (the value in the Limit column equals zero) then any number of calls (positive value shown in the Count column) will generate the 100% value in the Counter Percentage column.
- All changes to quota cell limit values are saved automatically.

3.3.4.1. Changing Quota Cell Limits

You can change the limit for any selected quota cell, or for a number of quota cells belonging to one or more quotas.

1. Click the desired quota cell (or a number of cells) in the grid to select them.

   This action is also applicable when a number of quotas is shown on the Quotas tab: you may select different quotas and quota cells in any order.

2. Right-click the selection and choose **Change Limit** from the context menu, or click the **Change limit** button in the frame toolbar.

   The Change Limit dialog opens.

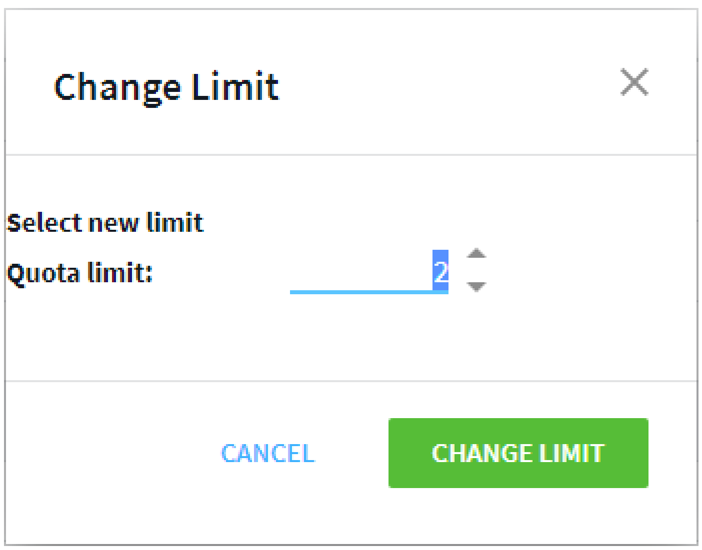


Figure 86 Changing limit for a quota target

3. Type the new value into the **Quota limit** field or use the arrow buttons to change the displayed value.
4. Click **Change limit** to confirm the new limit value.

   The dialog closes and the tab is refreshed. The new limit value will be applied to all the selected quota cells.

3.3.4.2. Activating Interviews which Fall into Specific Quota Cells

When the Activate action is run from the Quotas tab it activates all interviews that fall into the selected quota cells, taking into account the Action filter settings (go to Setting Up the Action Filter on page 90 for more information).

1. Display the Quotas tab in the bottom frame.
2. Select the required quota cells in the grid in the Quotas tab.
3. Right-click the selection and choose **Activate** from the context menu that appears.

   The Activate page opens.

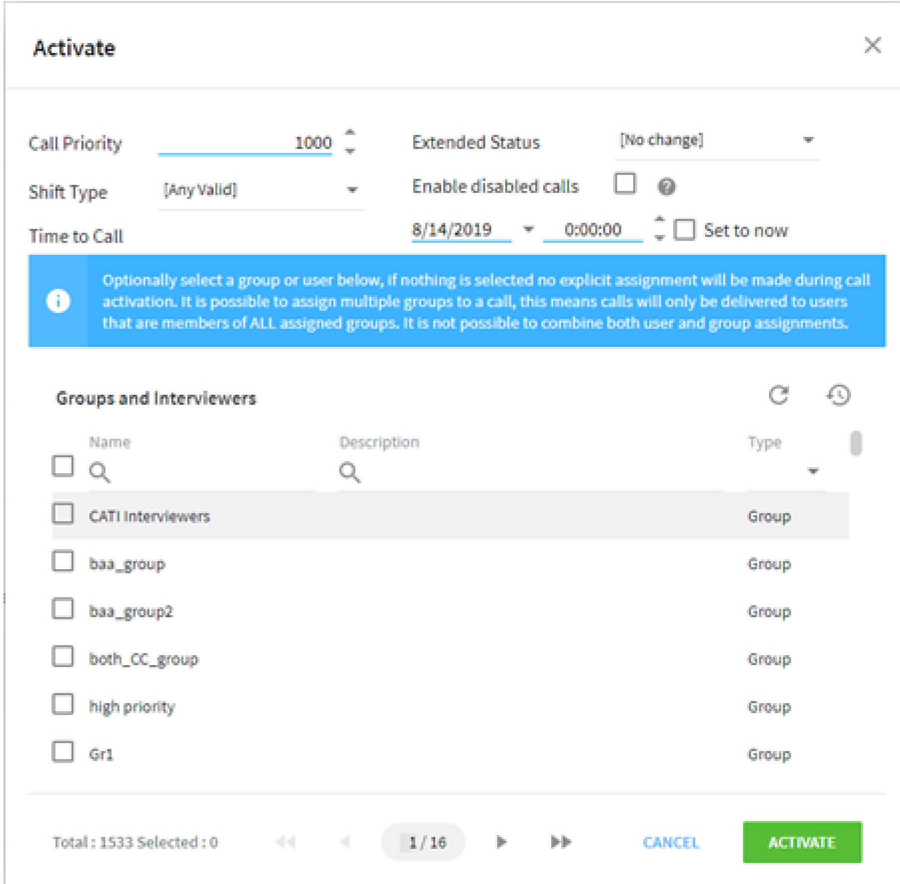


Figure 87 The Activate page

Note that if the quota-controlled call delivery is activated in Forsta Authoring, an additional interview/call property check is performed as part of an activation procedure.

If a quota is defined and enabled for the survey in the Authoring module (the "CATI delivery when quota not full" option is enabled in quota settings for this survey), the call activation procedure performs the following check for each call to be activated:

oFor calls which fall into each defined quota cell, the activation procedure checks if that quota cell is already full. If the quota cell is not yet full, the call is activated. If it is full, the call is not activated but its extended status remains unchanged. Be aware that in this case this call remains in the "Not scheduled" list.

Note that all calls that were "not activated" due to the above are still regarded as "successfully activated" calls and they are included in the total count of successfully activated calls in the Activate... progress dialog (see the next step below).

Disabled calls can be activated, but they will not be delivered to the interviewers. Disabled calls can become available for delivery to the interviewers only once they are enabled.

The Activate page provides a special option - "Enable the disabled calls". When this option is selected, all the disabled calls which should be activated change their state from Disabled to Enabled and thereby become available for delivery to the interviewers. By default this option is NOT enabled.

4. To complete the procedure, follow the instructions contained in Activating an Interview (go to Activating an Interview/call on page 143 for more information).

3.3.4.3. Changing Priority of Calls which Fall into Specific Quota Cells

When it is run from the Quotas tab, the Change priority action (go to Changing a Call Priority on page 147 for more information) changes the priority value of all interviews which fall into the selected quota cells taking into account the Action filter settings (go to Setting Up the Action Filter on page 90 for more information).

1. Display the Quotas tab in the bottom frame.
2. Select the required quota cells in the grid in the Quotas tab, then right-click the selection and choose **Change priority** from the context menu that appears.

   The Change priority page appears.

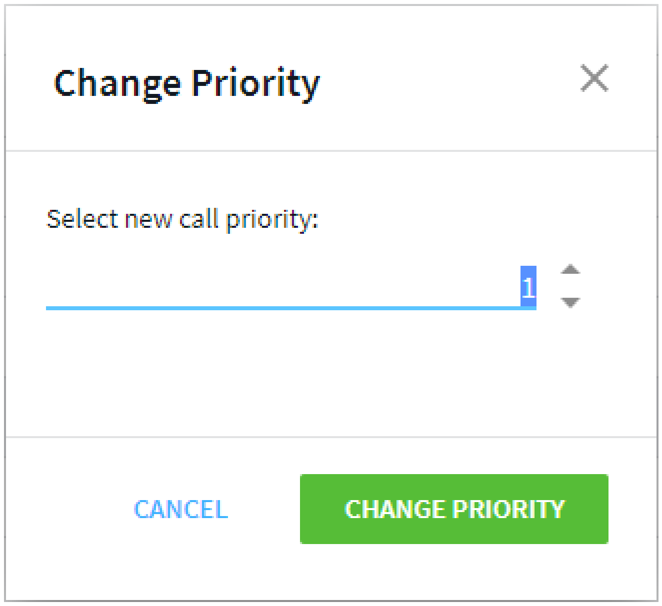


Figure 88 Changing priority of calls falling into quota cell(s)

3. Select the required priority (go to Changing a Call Priority on page 147 for more information).

3.3.4.4. Enabling Calls which Fall into Specific Quota Cells

Disabled calls that fall into specific quota cells can be enabled (go to Disabling and Enabling Calls on page 131 for more information).

When the Enable action is run from the Quotas tab, all interviews/calls which fall into the selected quota cells, taking into account the Action filter settings, are enabled (go to Setting Up the Action Filter on page 90 for more information).

1. Display the Quotas tab in the bottom right frame (go to To view and modify survey quota settings: on page 77 for more information).
2. Select the required quota cells in the grid in the Quotas tab, then right-click the selection and choose **Enable Calls** from the context menu.
3. Click **OK** in the confirmation message to proceed.

   The Enable calls in selected quota cells page is displayed.

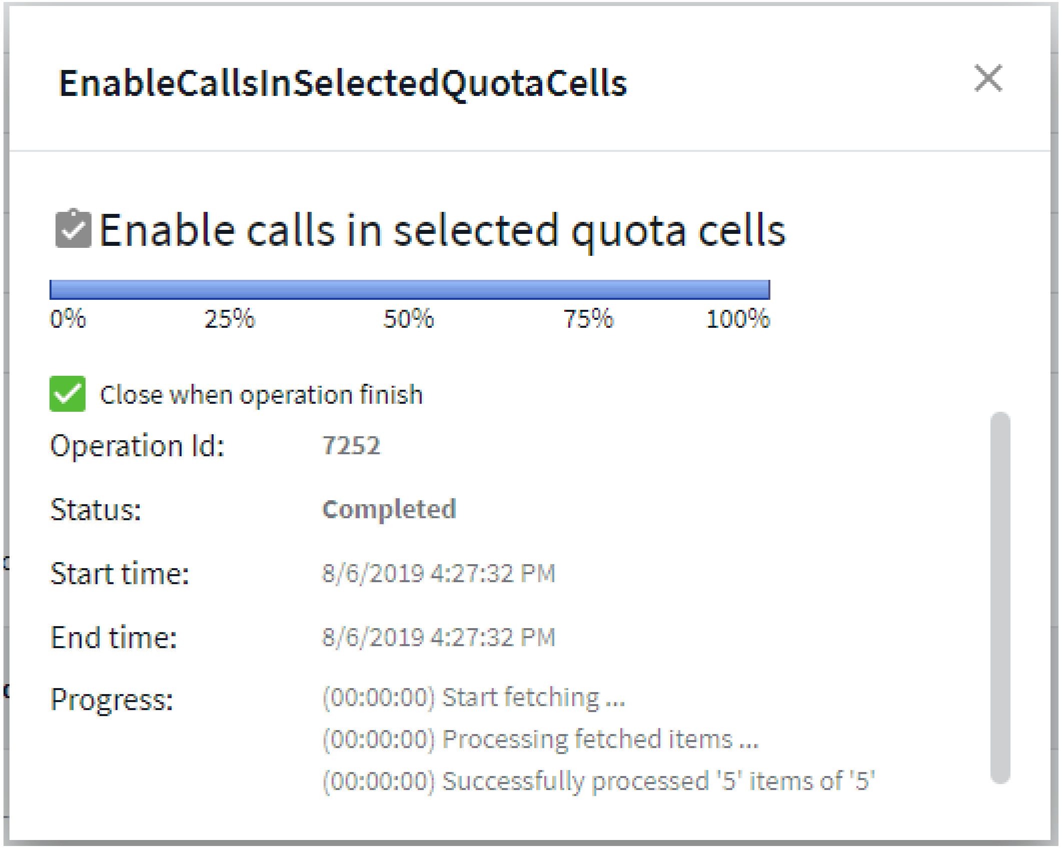


Figure 89 Enabling calls in selected quota cells

This page is similar to that used with the regular Activate, Enable and Disable operations. It shows the action summary and progress details. No additional configuration is available through this page.

5. Check the outcome of the Enable Calls operation indicated in the Progress field. If the operation is unsuccessful, follow the instructions to activate an interview (go to Activating an Interview/call on page 143 for more information).

3.3.4.5. Disabling Calls which Fall into Specific Quota Cells

Any call that falls into a specific quota cell can be disabled (go to Disabling and Enabling Calls on page 131 for more information).

When the Disable Calls action is run from the Quotas tab it disables all interviews which fall into the selected quota cells, taking into account the Action filter settings (go to Setting Up the Action Filter on page 90 for more information).

1. Display the Quotas tab in the bottom right frame (go to Viewing and Modifying Survey Quota Settings on page 76 for more information).
2. Select the required quota cells in the grid in the Quotas tab, then right-click the selection and choose **Disable Calls** from the context menu that appears.
3. Click **OK** in the confirmation message to proceed.

   The Disable calls in selected quota cells dialog box is displayed.

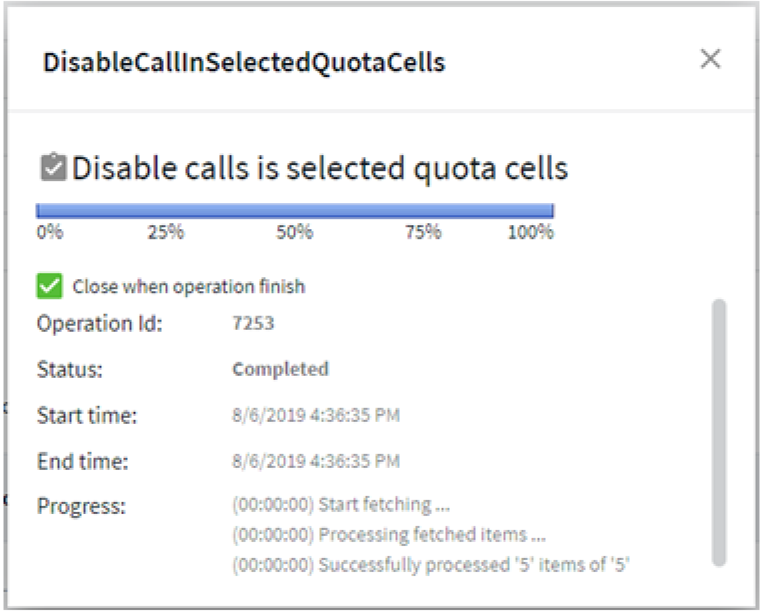


Figure 90 Disabling selected calls falling into quota cell(s)

The dialog shows the action summary and progress details (go to Activating an Interview/call on page 143 for more information).

When it is run from the Quotas tab, the Disable action disables all interviews/calls which fall into the selected quota cell taking into account the Action filter settings (go to Setting Up the Action Filter on page 90 for more information).

4. Check the outcome of the Disable Calls operation, indicated in the Progress field. If the result is partial or unsuccessful, follow the instructions for activating an interview (go to Activating an Interview/call on page 143 for more information).

3.3.4.6. Opening and Closing Quota Cells

In addition to enabling and disabling quota cells the supervisor has an option of closing and opening quota cells. This feature makes it possible to apply a persistent change to the state of a quota cell or multiple quota cells. There are two context menu commands that allow this: "Open cells" and "Close cells".

Closing a quota cell will introduce the same behavior as when the achieved count for a cell has reached the pre-defined limit. Any remaining scheduled calls are then automatically disabled. The value in the "Remaining" column is highlighted in red and the keyword "Closed" is displayed next to this value to indicate the modified status of the quota cell.

Important!
Closed quota cells are marked and distinguished in the described way ONLY IN THE CATI SUPERVISOR MODULE. Closed quota cells are not in any way marked or highlighted in the Professional Authoring module. Although closed quota cells will affect data collection the reason for this may remain unclear if you do not monitor the quota cell state in the CATI Supervisor module. Check the quota cell state in the CATI Supervisor to ensure it is under control.

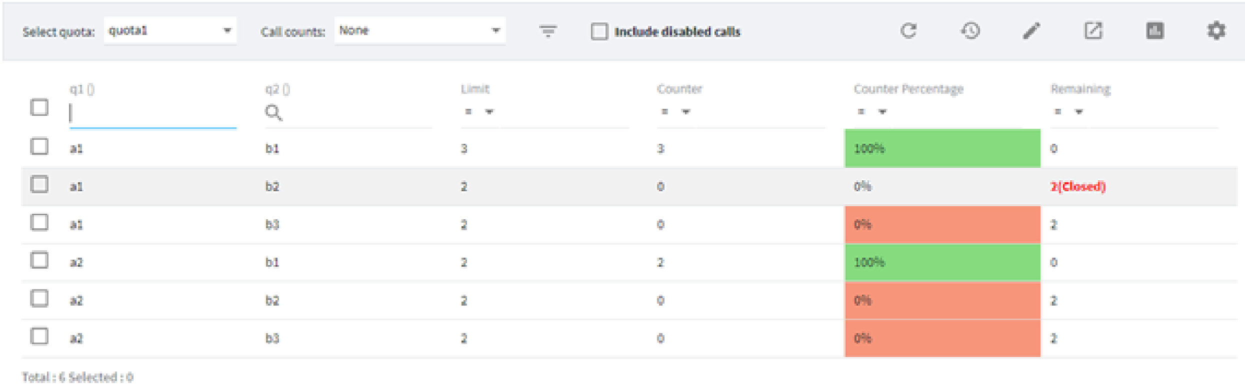


Figure 91 Closed quota cell with remaining calls (value highlighted in red)

Note that unlike the "Disable/Enable" option, the "Close/Open cells" feature is applied to ALL calls that fall into the selected quota cells. This means that calls which are added to that quota cell AFTER it has been closed will inherit the status of calls that existed in this quota cell at the moment it was closed. When calls falling into a certain quota cell are "disabled" (the "Disable current calls" option is applied to this quota cell), it does not affect calls that may be added to that cell in the future.

Note that to use the Open/Close quota cells feature the appropriate quota handling behavior must be performed by a System Administrator on the **Admin > Settings** tab using the Call filtering behaviour for filled quotas" option (go to General Settings Group on page 448 for more information).

To close a quota cell (or multiple quota cells)

1. Select one or more quota cells in the Quotas tab, right-click the selection and choose **Close cells** from the context menu that appears.

   The frame is refreshed, and the "Remaining" value for the selected quota cell(s) is highlighted in red and the "Closed" indicator is displayed next to it.

   Note that the color coding of the Counter Percentage cell will not change - it will continue to show how close the achieved value is to the limit.

To open a quota cell (or multiple quota cells)

1. Select one or more quota cells in the Quotas tab, right-click the selection and choose **Open cells** from the context menu that appears.

   The frame is refreshed, and the red highlighting and the "Closed" indicator are removed from the "Remaining" value for the selected quota cell(s).

3.3.4.7. Setting up a Balancing Priority for Quota Cells

When quota balancing is enabled for a survey (go to Quota Balancing on page 93 for more information), the supervisor can apply a balancing priority to distribute promoted calls among quota cells. The options are: **No Balancing**, **Low**, **Medium** or **High**.

Note that this priority parameter is not the same as the priority parameter which is set up when the quota balancing feature is enabled for a survey. The Balancing Priority option explained here allows the supervisor to apply an additional "rate" that will be used to increase or decrease the number of promoted calls coming to selected quota cells, or exclude a quota cell from balancing.

- When the supervisor sets the Balancing Priority for a quota cell to **"High"**, the value of the corresponding quota Limit is multiplied by 1,5. The value shown in the Limit column remains the same, but the calculation formula changes. The system will then promote to this quota cell 1,5 times more calls than it would normally.
- When the **"Low"** Balancing Priority is set for a quota cell, the limit value used to calculate the number of calls promoted to this cell is divided by 1,5.

- The **"Medium"** Balancing Priority keeps the number of promoted calls unchanged - the system promotes as many calls as it would without any Balancing priority setting applied. The **"No Balancing"** option excludes this quota cell from the quota balancing procedure.

To specify the Balancing Priority for quota balancing:

1. Ensure the quota balancing feature is activated for the survey (go to Quota Balancing on page 93 for more information).

   When quota balancing is enabled for a survey, the "Balancing Priority" column is displayed in the Quota list on the Quotas tab towards the right side of the grid.

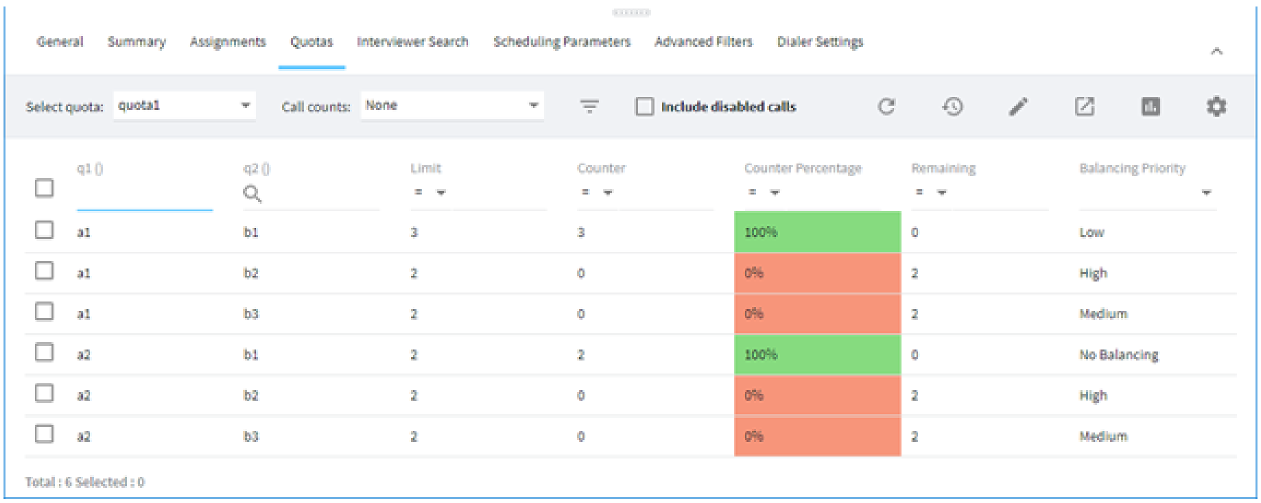


Figure 92 The Balancing Priority column

   By default all quota cells are assigned the "Default" rate (which assumes no changes in the number of calls promoted to this quota cells).

2. To change the priority value, right-click the required quota and choose **Balancing Priority** from the shortcut menu that appears.

3. In the drop-out menu choose the required value: Low, High, Medium or No Balancing.

   The quota list refreshes and the selected balancing priority is displayed in the Balancing Priority column.

   Repeat the process for each quota that you wish to change the Balancing Priority rate for.

3.3.4.8. Setting Up the Action Filter

You can set up an Action filter that will be applied whenever you perform an available action for interviews/calls belonging to specific quota cells. This filter lets you specify particular interviews/calls falling into the selected quota cells for which an action will be executed.

The action filter must be set up separately for each quota.

When you set up an action filter you select particular questions defined in the quota to act as the filter. When this filter is applied to quota cells, it allows an action to be executed for interviews/calls that both fall into these quota cells AND contain answers from these questions. The executed action will not be allowed for interviews/calls which fall into the same quota cells BUT DO NOT contain answers from the questions selected as the filter.

For example:

Assume we need to execute an action for two quota cells. The first quota cell includes answer "A1" from question Q1, answer "B1" from question Q2 and answer "C1" from question Q3; the second quota cell includes answer "A2" from question Q1, answer "B2" from question Q2, and answer "C2" from question Q3. If we set up the Action filter by selecting questions Q1 and Q3, then any action will be executed only for interviews/calls containing:

- answer A1 from question Q1 and answer C1 from question Q3,

OR

- answer A2 from question Q1 and answer C2 from question Q3.

The action will not be executed for the remaining interviews/calls.

To set up an Action filter:

1. Display the Quotas tab in the bottom frame (go to To view and modify survey quota settings: on page 77 for more information).
2. From the **Select quota** drop-down list select the quota for which you want to set up an action filter.
3. Click the **Action filter** button .

   A drop-down form opens below the button with a list of questions contained in the currently selected quota.

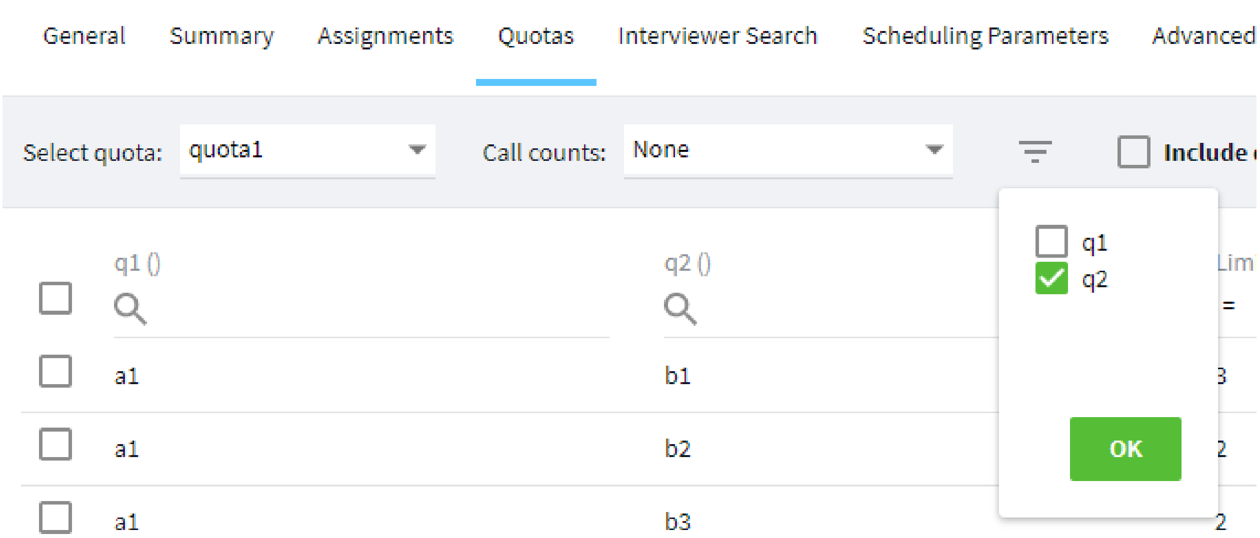


Figure 93 Action filter setupC

4. Check each question that you wish to act as a filter.
5. Click **OK** in the form.

   The action filter is now configured. The filter will be applied for any action that is executed for records falling into the currently selected quota. It will not be applied for actions that are executed for records falling into other quotas.

6. Repeat the procedure as necessary for other quotas.

3.3.4.9. Viewing the Extended Status Breakdown Information for Quota Cells

You can see how many interviews/calls actually fit each cell, and what their extended statuses are.

Note that this information is available only when a specific "Call Counts" filter is applied, and the Call Counts column is displayed in the grid on the Quotas tab (go to To view and modify survey quota settings: on page 77 for more information).

The Call Counts are only available for calls/interviews where the data is known for the questions that make up that quota cell. If the data is not yet captured, the cell is not known and not included in the counts.

1. Display the Quotas tab in the bottom right frame (go to To view and modify survey quota settings: on page 77 for more information).

2. Choose the desired quota from the Select Quota drop-down list. The grid in the tab lists all quota cells defined for the selected quota.

3. Choose an option from the “Call counts” dropdown list (any of the “Scheduled calls”, “Scheduled calls with specific statuses” or “Interviews with specific statuses”), and configure this filter (go to To view and modify survey quota settings: on page 77 for more information).

   Check the total number of interviews that match the selected Call Count filter - this is the number shown in the Call Counts column for each quota cell. Note that the Status Breakdown dialog will list the matching total number of interviews/calls.

4. Select the required quota cell in the grid in the Quotas tab, then right-click the selection and choose **Status Breakdown** from the context menu that appears.

   The Status Breakdown dialog opens.

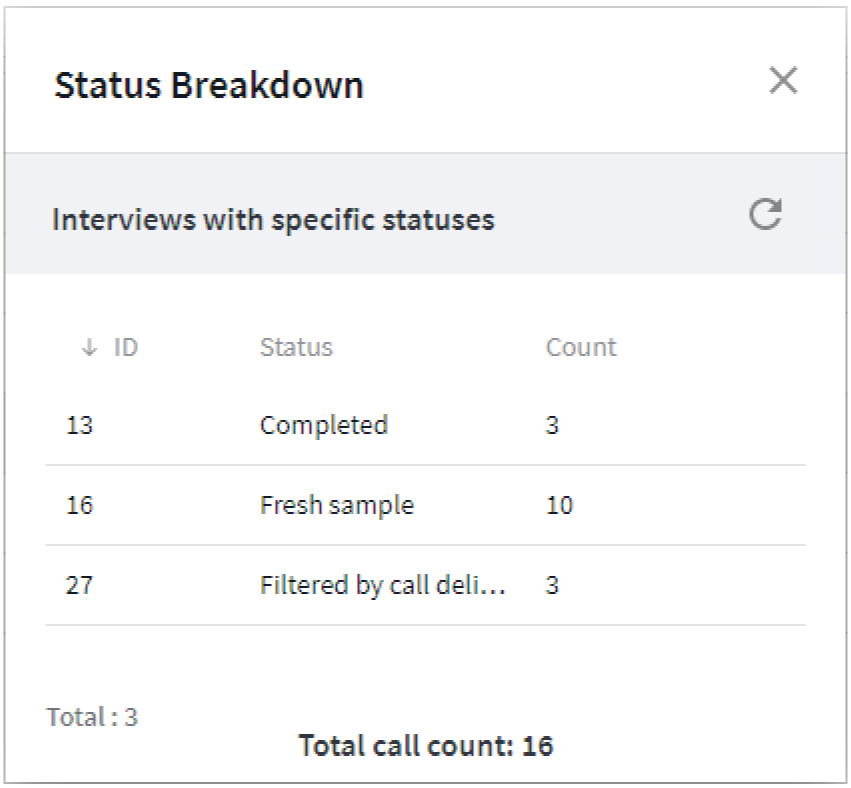


Figure 94 Viewing the Status Breakdown information for a quota cell

The dialog lists the interviews/calls that fit the selected quota cell. The list is broken down by extended statuses - one extended status type per row. Each row shows the following information:

oExtended Status ID.

oExtended Status name.

oCount of interviews/calls with this status.

Below the grid is a summary of the total number of detected extended statuses and the total count of calls with these statuses.

5. To update the list, click the **Refresh** button .

6. Click **Close** to close the dialog.

3.3.4.10. *Transferring a Quota Filter to Call Management*

This operation allows you to create a filter using a specific quota cell (or a number of cells) as the condition, and apply it in Call Management.

The action brings up the Call Management window showing interviews/calls that match the chosen condition - only interviews/calls with provided answers that fall into the selected quota cell(s) will be displayed; the remaining interviews/calls will be hidden.

To transfer a quota filter to Call Management

1. Display the Quotas tab in the bottom frame.
2. Select the required quota cells in the grid in the Quotas tab, then right-click the selection and choose **Call management** from the context menu that appears.

   The Call management dialog opens.
3. Change to the All view.

   The All view contains only interviews/calls with provided answers that fall into the selected quota cell(s) will be displayed, the rest interviews/calls will be hidden.

3.3.4.11. *Generating the Quota Progress Report*

You can generate the Quota Progress Report (go to Generating the Quota Progress Report on page 417 for more information) from the Quotas tab. The Quota Progress Report generated in this way provides statistics for the currently viewed survey and selected quota for the current date.

To do this, when the required quota is selected in the Select Quota drop-down list, click the **Quota Progress Report** button on the tab's toolbar. The report is generated.

3.3.5. Quota Balancing

Quotas can be specified for a CATI survey, in the Forsta Authoring module. Refer to the Forsta Authoring manual for instructions. Note that if specified quotas are not enabled for use with a CATI survey, they will not be available in the CATI Supervisor module (go to Viewing and Modifying Survey Quota Settings on page 76 for more information).

The supervisor can set up the CATI Supervisor module to automatically monitor and trim the quota cell filling. This is done with the help of the Quota Balancing option (available on the General tab of the Survey properties view (go to Viewing and Modifying a Survey's General Properties on page 68 for more information). The system uses these settings to balance the filling of the quota cells for the selected quotas - it identifies quota cells with the highest and lowest filling, and promotes calls to quota cells with the lowest filling to even out the inequalities.

The Quota balancing procedure can be set up for one quota, or for multiple quotas simultaneously for a survey.

When enabled, the Quota balancing procedure runs regularly in specific time increments (the increment is determined by the system), and performs the following operations in sequence for each survey for which the Quota Balancing option was specified:

- The procedure is first run separately for each quota chosen for balancing. When quota cells requiring call promotion are identified for each balanced quota, the system starts promoting calls for quota cells selected in step 2 from all quotas chosen for balancing, and distributes calls among these cells.
- **Step 1.** The quota balancing procedure calculates "percentage of fullness" as compared to the limit value for each selected cell of a quota selected for balancing. In this step the procedure applies the Balancing Priority setting (go to Setting up a Balancing Priority for Quota Cells on page 89 for more information). The procedure thereby identifies the quota cells with the lowest and highest achieved figures.
- **Step 2.** It detects ALL cells with a value that differs from the highest achieved value by more than a threshold (see definition of the Threshold parameter below), and it randomly selects five (this number can be configured) of the lowest filled cells. Note that not all quota cells with the number of calls below the threshold will necessarily receive the additional calls.
- **Step 3.** It calculates the number of calls that should be promoted for each chosen quota cell so that the number of calls in all quota cells selected for balancing will be equal.

- **Step 4.** The quota balancing procedure attempts to promote a proper number of calls for each chosen quota cell while applying the following settings:

  oFilter - it chooses calls to promote using the value provided in the Filter field (see (go to After you have selected the required quotas in the list on the left, the Filter list on the right displays the questions which make up the quotas. You can choose questions that are included in at least one quota. If a question is not included in any of the quotas selected in the list on the left, it will be grayed out in the right list and will be inaccessible. You can use the default selection or select your own. This filter will be applied as a condition to select matching records (calls) from those fitting into selected quota cells. on page 95 for more information));

  ocall Priority value - it sets a new call Priority value (not to be mixed with the Balancing Priority setting) for each chosen call (to promote calls into the Active list to generate more dialing activity for calls which fit into specific quota cell).

- **Step 5.** For each promoted call the Quota balancing procedure writes a corresponding record to the Quota Promotion History list (see (go to Viewing the Quota Promotion History on page 96 for more information)).

The procedure below describes the supervisor's actions required to configure the quota balancing parameters, and to edit previously configured settings.

1. In the Survey list select and open the survey for which you want to set up quota balancing (go to Opening and Closing a Survey on page 67 for more information).

2. Open the survey properties in View mode and go to the General tab (go to Viewing and Modifying a Survey's General Properties on page 68 for more information).

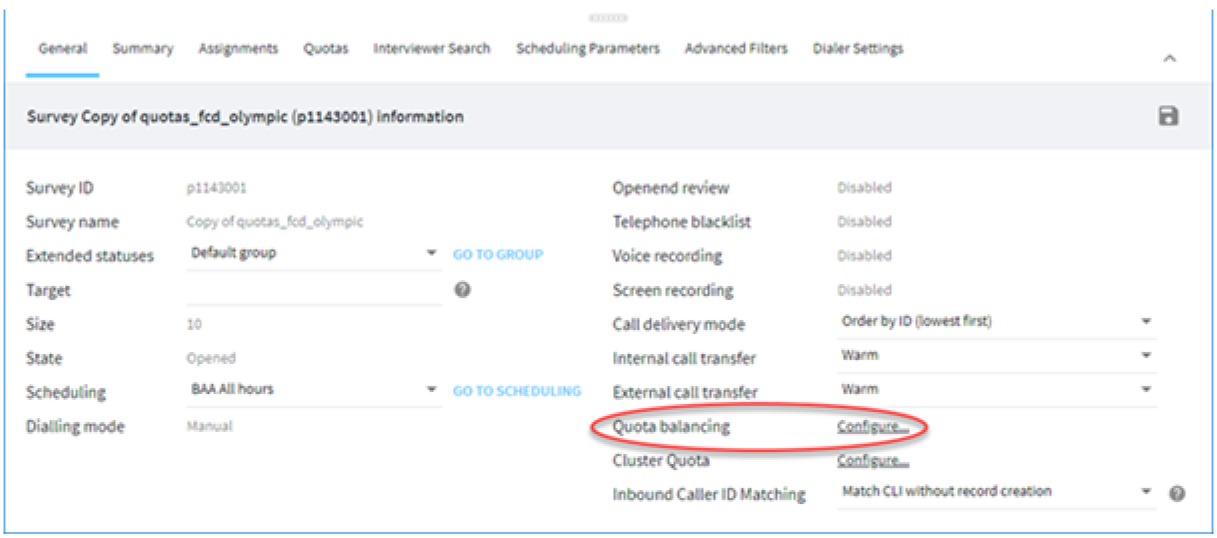


Figure 95 Choosing the Configure link for the Quota Balancing option

If at least one quota is available for the survey, the **Quota Balancing** option appears on the General tab with the **Configure...** link. If no quota is available for that survey, the Quota Balancing option will not be available.

If the Quota Balancing option contains only the Configure.. link, this indicates that the quota for balancing was not selected. If the option also shows the quota name and the **Clear** button, the Quota Balancing is already configured and you can either edit the balancing parameters or clear them.

3. Choose the **Configure...** link beside the Quota Balancing option.

   The Quota Balancing Parameters window opens.

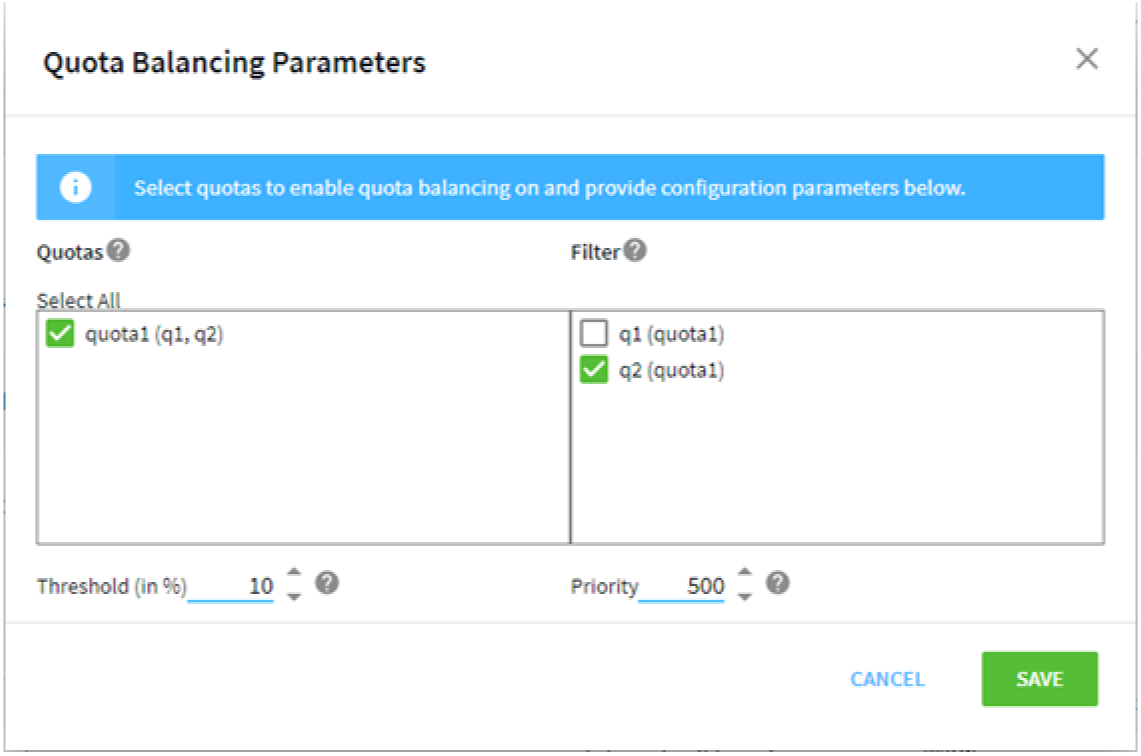


Figure 96 Specifying the Quota Balancing settings

Configure the quota balancing parameters:

- In the Quotas list select the quota(s) on which quota balancing is to be conducted.
- After you have selected the required quotas in the list on the left, the Filter list on the right displays the questions which make up the quotas. You can choose questions that are included in at least one quota. If a question is not included in any of the quotas selected in the list on the left, it will be grayed out in the right list and will be inaccessible. You can use the default selection or select your own. This filter will be applied as a condition to select matching records (calls) from those fitting into selected quota cells.

Note: Quota balancing is performed based on questions that include data. If question data is missing for a record then this record will not be selected for promotion. Also, if a question (variable) that makes up a quota is selected as a filter but the sample contains no data for this question, then the quota balancing procedure will not include this quota. To re-include such quotas into balancing you must remove the question from the filter.

- Enter the **Threshold** value. This value is used to detect quota cells that require additional calls. This is a configurable percentage figure. If the difference between the "quota achieved" figure (go to Viewing and Modifying Survey Quota Settings on page 76 for more information) for the most populated quota cell and any other cells falls below this threshold, the quota balancing promotion procedure will be initiated. The default value is 10%.
- Enter or select the **Priority** value. The default value is 500. Activated calls' priorities will be changed to this value when quota balancing promotes calls. If a low value is entered here, existing calls may already have higher priority values, resulting in quota balancing effectively not promoting calls. Care should be taken not to exceed appointment priority values (typically 1000) as this may result in appointments not being delivered as expected.

4. Click **OK** in the dialog to apply the configured parameters.

   When the quota balancing parameters are set, the Quota Balancing option on the General tab will display the chosen quota name beside the Configure... link, and the **Clear Balanced Quota** button (see below).

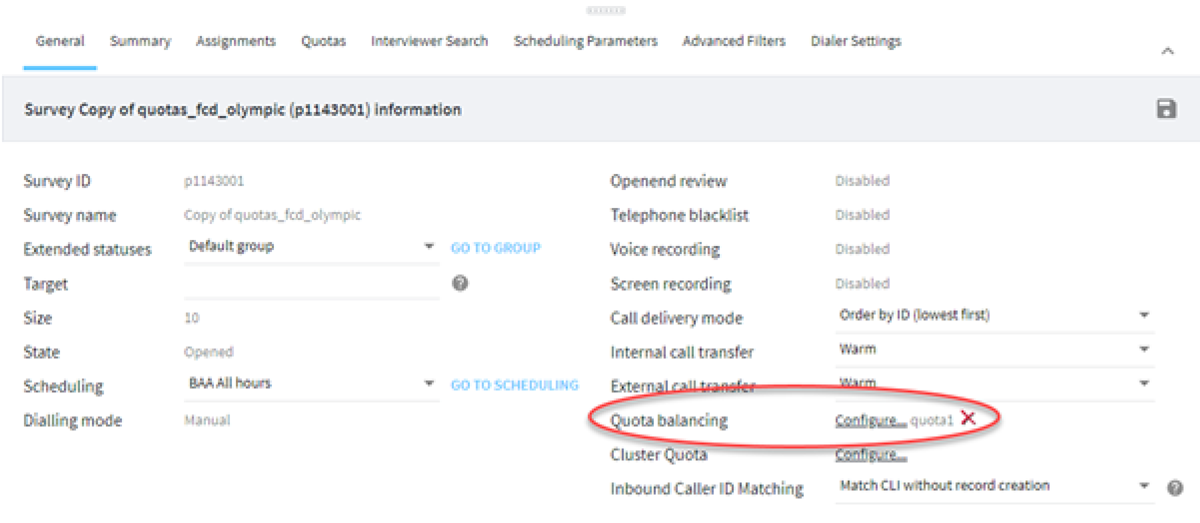


Figure 97 The General tab showing that Quota Balancing parameters are set

5. To clear all quota balancing parameters, click the **Clear Balanced Quota** button beside the Configure... link.

   All the balancing settings, including the name of the quota selected for balancing, will be cleared, and the quota name and the **Clear...** button will be removed from the General tab.

Note: Click the Save button after you clear the Quota balancing parameters and before you leave the Survey information view. If you do not save the changes, Quota balancing parameters will not be cleared.

   To set up quota balancing again after clearing the parameters, you must reconfigure the quota balancing parameters.

Note that the Quota Promotion History list is available for CATI surveys from a context menu on the Surveys… tab (go to Viewing the Quota Promotion History on page 96 for more information). This list contains information on how many calls were planned for promotion, how many were actually promoted, the promotion procedure date and time, and the quota cell ID for which promotion was performed. You can use these statistics to reconfigure Quota Balancing settings if required.

3.3.6. Viewing the Quota Promotion History

You can view the detailed information regarding calls that were planned for promotion to maintain the quota balancing (go to Quota Balancing on page 93 for more information). All information regarding such calls is recorded separately for each survey, and can be viewed as a list in a dedicated dialog. The list of promoted calls is called the Quota Promotion History and can be displayed by using a corresponding context command in the Survey list view.

The Quota Promotion History can be of help when you need to analyze the Quota Balancing results. For example, you may notice that some quota cells get fewer promoted calls than was planned by the system. You may then consider reconfiguring the quota balancing parameters, or changing the survey strategy in another way to maintain more complete filling of the quota cells. You could for example upload an extra sample containing records that fit the insufficiently filled quota cells.

All quota promotion actions are logged by the system, and these records are kept for seven days. Recorded actions older than seven days are automatically deleted.

The Quota Promotion History dialog allows you to select a time period and view all quota promotions made for the chosen survey over the selected time period.

To view the quota promotion history:

1. Open the list of all surveys in the Survey list view (go to Viewing the Survey List on page 65 for more information).

2. Right-click the required survey in the list and choose Quota Promotion History from the context menu that appears. This will display the Quota Promotion History dialog.

   By default the Quota Promotion History dialog displays data logged during the current day.

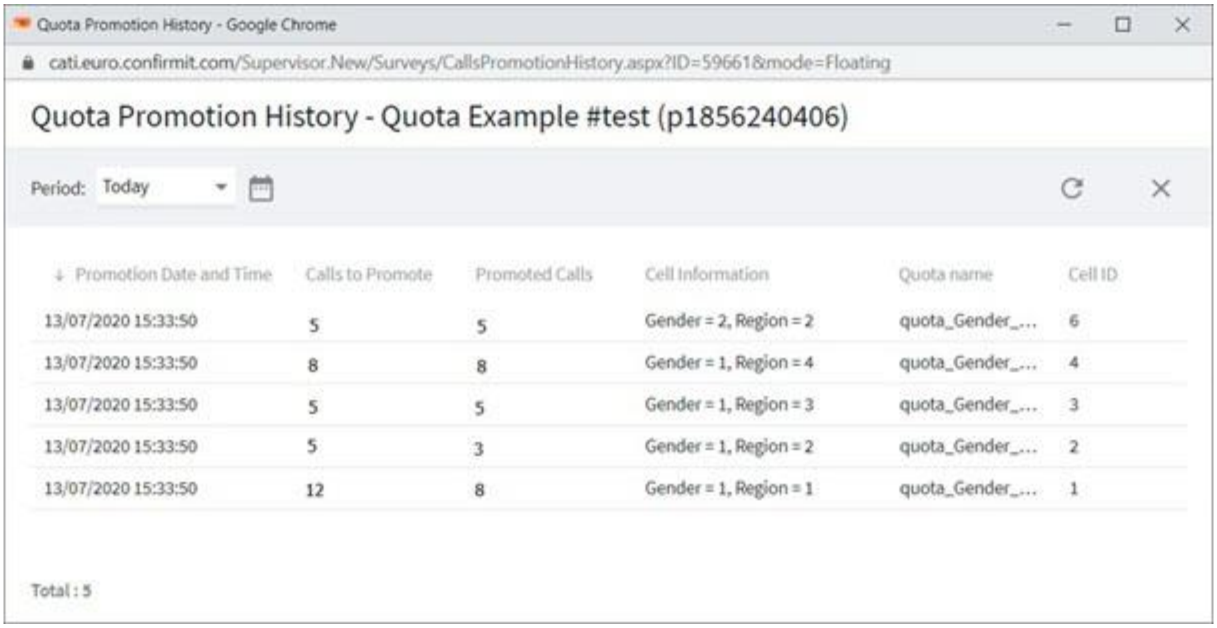


Figure 98 Viewing the quota promotion history

The list in this window shows details of each particular promotion made during the time interval selected for viewing.

The following details regarding each promotion action are available:

oPromotion date and time - the timestamp of the promotion action.

oCalls to Promote - the number of calls that were planned for promotion to the particular quota cell (forecast calculated by the system).

oPromoted Calls - actual number of calls promoted to the particular cell during the selected time period (ideally this should equal the number that was planned for promotion).

oCell Information - quota values which are set for this quota cell.

oCell ID - ID of the cell.

3. Use the Period drop-down list to select the time period for which the quota promotion history is to be shown. If you select **Range**, the **Range** button to the right of this drop-down field becomes active;.click it to choose the particular time range.

   The form below opens.

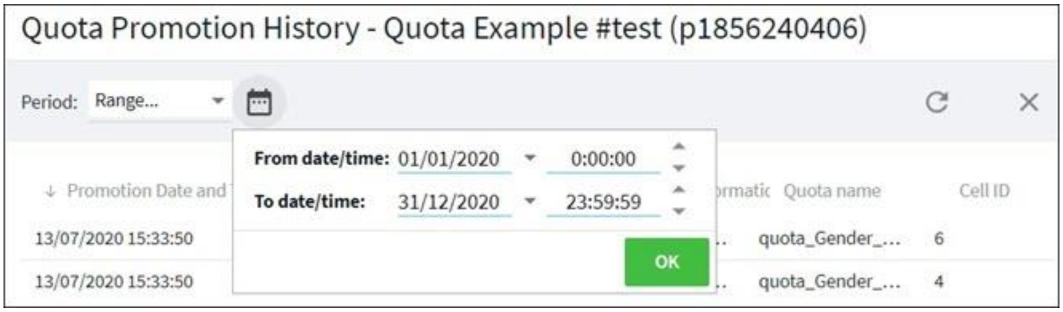


Figure 99 Choosing the time range for the quota promotion history

Select the start and end date and time using the available controls. The time is set using the spin controls, and the date is set using the calendar form - click the arrow button beside the date to display the calendar form. Using the form controls you can:

oChoose a date in the calendar by clicking on it.

oBrowse through months by pressing the arrow buttons above the weekday names.

oSelect a month from the drop-down list.

oSelect a year from the drop-down list.

Choosing the date will close the calendar form and display the chosen date in the Range form.

Click **OK** in the Range form when the start and end dates are set.

4. Once you have selected the time range, click **Refresh** on the dialog toolbar.

   The quota promotion list is updated to show all promotion actions logged during the selected period.

You may notice that some promotion actions are highlighted in red. This means that the number of calls promoted to this cell was lower than the planned number. In this case you may consider uploading an extra sample containing records that fit the insufficiently filled quota cells.

3.3.7. Quota Clustering

Whenever you need to be sure that at any one moment the number of active calls falling into a certain quota cell does not exceed the required limit you should enable the Quota Clustering option.

Note: Check if the "Cluster Quota" option is available on the General tab. It becomes available if a corresponding CATI Supervisor system setting is enabled. If it is not - contact the system administrator.

Remember that only quotas that have the “Display Quota in CATI Supervisor” setting enabled in the Authoring module are available for clustering (refer to the appropriate section in the Forsta Authoring manual for description of this setting).

Only one quota at any time can be "clustered". To "cluster" another one you must first remove the clustering limitation from the currently selected one (see the instruction on how to reset quota clustering below).

Quota clustering takes effect only for interviewers who log in to work in the Survey Selection mode (go to Selecting a Survey/Interview on page 252 for more information).

Note also that quota clustering cannot be enabled when predictive dialing mode is enabled (go to Dialer on page 349 for more information), or when call groups are used (go to Configuring the Call Groups on page 341 for more information).

To setup quota clustering:

1. Ensure the quota you want to apply the Quota Clustering setting to is enabled in the Authoring module. If it is not then the quota will not be available for configuration in CATI Supervisor.
2. Open the survey containing the required quota in the View mode (double-click the survey in the Survey List).

3. Go to the General tab.

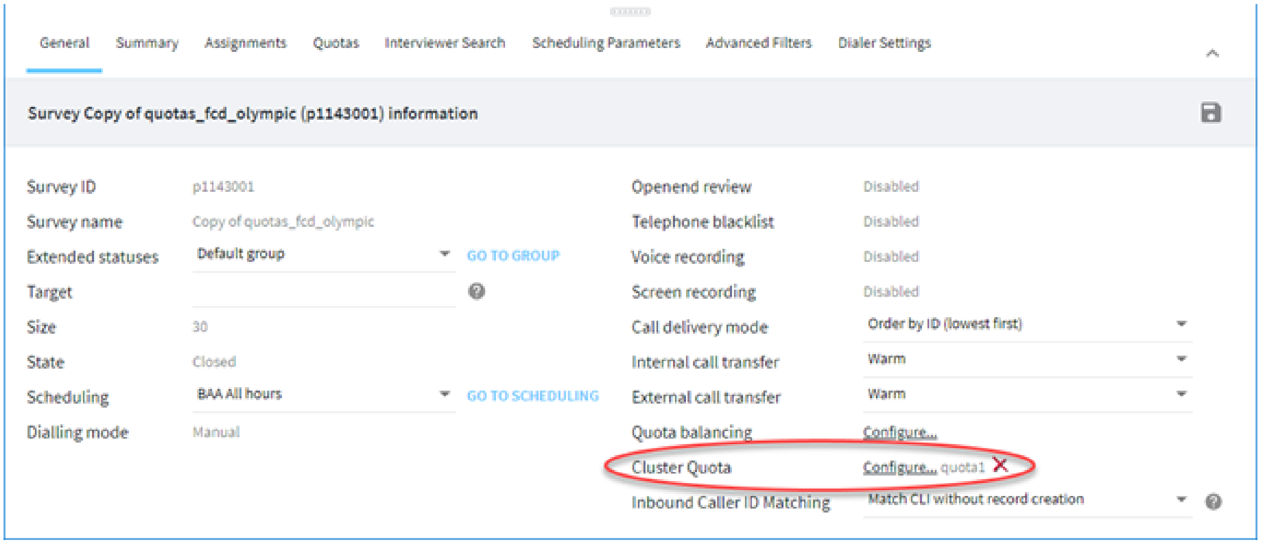


Figure 100   Quota clustering settings on the General tab in survey View mode

4. Check the Dialing mode. It should not be set to either Predictive or Hybrid.
5. Check if the Call Groups option is set to Disabled. Correct these settings if required.
6. Click the **Configure...** link for Cluster Quota.

   The Quota Clustering Parameters window opens.

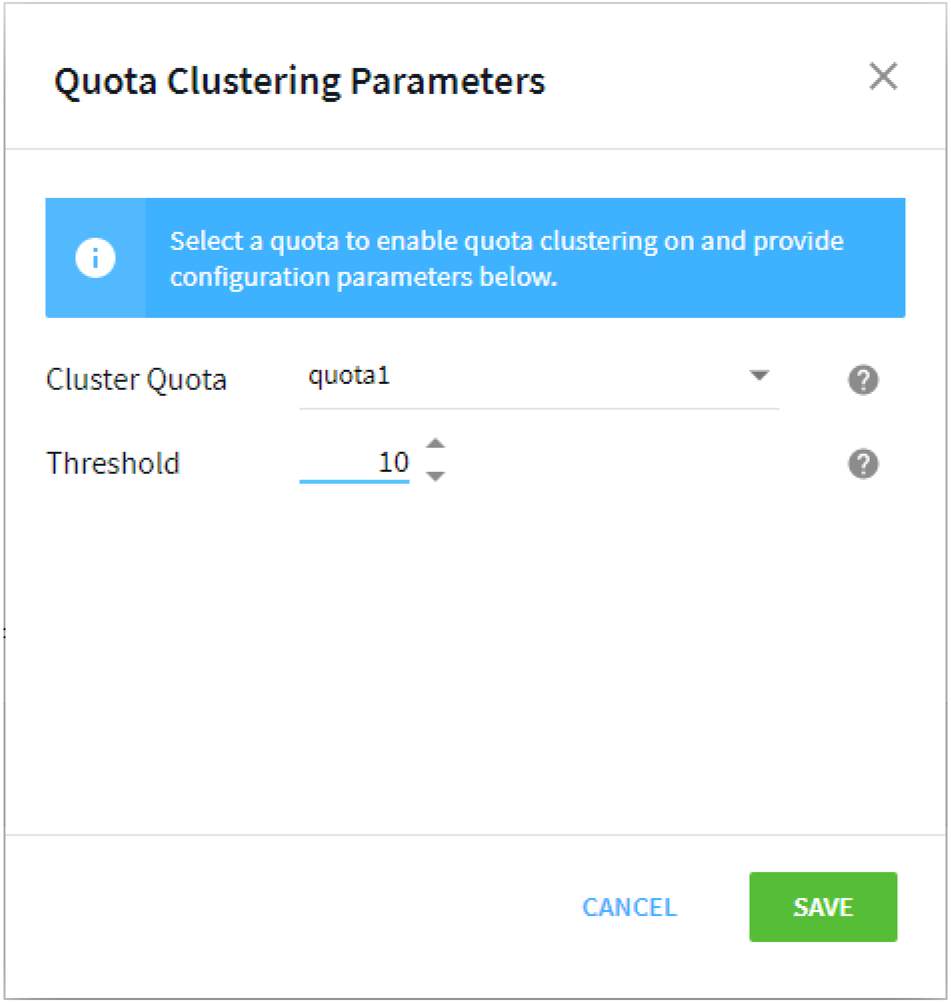


Figure 101 Configuring the Quota clustering parameters

7. In the Cluster Quota drop-down list, select the quota to which the clustering settings are to apply.
8. Set the threshold value using the Threshold spinbox.

   The threshold value is a configurable absolute figure. It is the maximum number of active calls being interviewed at any one time in a particular quota cell for every cell in the quota cluster.
9. On completion click **Save**.

   The Cluster Quota will be displayed on the General tab (Survey View mode) next to the Configure... link (go to Quota clustering settings on the General tab in survey View mode on page 99 for more information).

   The red X-icon next to the Cluster Quota name allows you to reset the currently selected Cluster Quota. To set up a new Cluster Quota you must repeat this procedure starting from Step 5 (see above).
10. Click the **Save** button to save changes.

To reset quota clustering.

1. Open the survey containing the required quota in the View mode (double-click the survey in the Survey List).
2. Go to the General tab (see (go to Quota clustering settings on the General tab in survey View mode on page 99 for more information).
3. Click the red X-icon next to the Configure... link and the name of the currently selected Cluster Quota.

The quota name disappears. Now the survey does not contain any Quota clustering limitation.

4. Click the **Save** button in the upper right corner of the tab to save the changes.

3.3.8. Quota Status Report Export

You can create a report containing a complete list of details for all quotas that are currently set up for the survey. The Quota Status report provides the following information for each quota:

- **Quota cell label** - the name of the cell, constructed from the answers used in the quota definition.
- **Limit** - the limit set for this quota cell.
- **Counter** - the number of completed interviews for this quota cell.
- **Counter Percentage** – the percentage of completed interviews for this quota cell.
- **Remaining** - the number of interviews needed to meet the limit for this quota cell.
- **Call counts** - the number of interviews that have calls in the CATI system for this quota cell.
- **Used calls** - the number of interviews that do not have calls in the CATI system for this quota cell, excluding completed interviews (for example "Refusal" etc.).
- **Burn rate** - the rate at which sample is being processed for this quota cell (Used Calls divided by Counter).

The Quota Status report provides data in tab-delimited format. The generated report is contained in a plain text file which you can either preview, or download to some location as a ZIP archive.

Exporting a quota status report:

1. In the Survey List, find the survey for which you need to create a quota status report, right-click the survey and choose “Quota Status Report Export” from the context menu that appears.

   A page opens that explains what information is included into Quota Status report.

2. Click **Generate Report** to proceed.
3. Choose where to save the generated file.

3.3.9. Adding Searchable Questions to the Interview

You can add questions contained in the survey to the set of interview parameters displayed in the CATI Interviewer Console. They are appended as columns which are displayed in the interview list in the Interviewer Console. Questions selected by the supervisor become available for the interviewer when he/she works in the Manual interview selection mode (go to Manual Selection Mode on page 255 for more information).

These added columns/questions are searchable and they provide the interviewer with more versatile searching possibilities. They can search not only by default parameters but also by any question the supervisor has selected using this procedure.

Note that this is possible only for questions which are marked as "Available as CATI filter". Questions can be marked as "Available as CATI filter" in the Forsta Authoring application, refer to the appropriate section in the Authoring manual for instructions.

By default the so called "system" fields are available for inclusion as searchable questions. These fields are displayed at the top of the list of searchable questions displayed in the Interviewer Search tab (see the picture below - these questions are of the "System" type). The "ID" and "Status" questions are checked (included) into this list by default. You can clear the relevant boxes to exclude them from the list of the searchable questions. These system fields are also appended as searchable columns to the interview list when they are selected. Also please note that Time to call column shows time in the interviewer timezone, it is not searchable, but its contents can be sorted. For interviews with the Fresh Sample status it will show "Now". When you hover mouse pointer over this column the Interviewer Console will display the corresponding Time To Call value in the respondent timezone for each interview (go to Manual Selection Mode on page 255 for more information).

To add searchable questions to the interview

1. Mark all the required questions as "Available as CATI filter" in Authoring (refer to the appropriate section in the Authoring manual for instructions). Note that system fields cannot be marked in this way, they appear in the list by default.
2. Display the Survey Information view for the required survey in the right bottom frame (go to Viewing and Modifying a Survey's General Properties on page 68 for more information).
3. Change to the Interviewer Search tab.

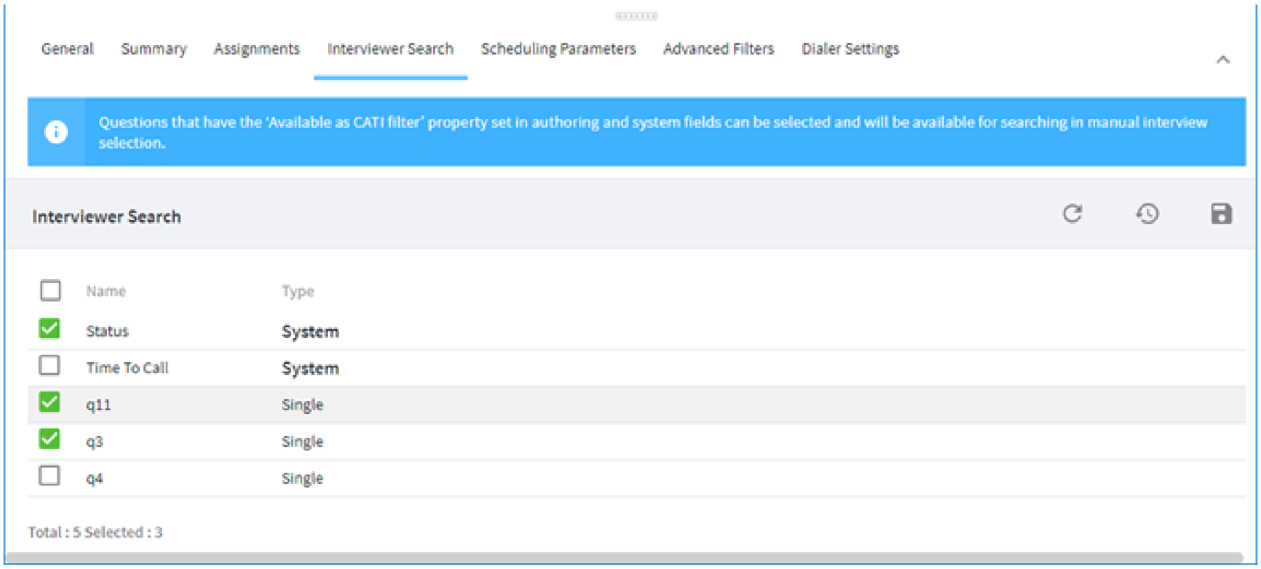


Figure 102 Viewing the Interviewer Search tab contents

4. Select the required questions in the list by checking the box in front of the question name.

   Note that only a selected question will be added to the interview parameter set and displayed in the interview list in the CATI Interviewer Console.

5. On completion, click the **Save** button  on the toolbar to save the changes.

3.3.10. Viewing and Modifying Parameters of the Scheduling Script used with the Survey

Scheduling script parameters that were added to the Parameters tab (go to Parameterized Scheduling Scripts on page 217 for more information) and then applied to the scheduling script actions, can be observed on the Scheduling Parameters tab of the Survey Information view. The supervisor can modify these parameter values from the Scheduling Parameters tab.

Note that no more than 30 parameters can be added to a single scheduling script.

Note: Scheduling script parameters modified on this tab are applied only for the current survey - this operation does not change the default parameter values.

The default parameter values remain unaltered until the supervisor opts to change them (go to Parameterized Scheduling Scripts on page 217 for more information)

To edit scheduling script parameters for the current survey:

1. Go to the **Navigation > Surveys** menu item to display the list of surveys in the top frame.

2. Right-click the required survey and choose **View** from the shortcut menu, or click the **View** button on the toolbar.

   The survey properties are displayed in the bottom frame of the browser window.

3. Go to the Scheduling Parameters tab.

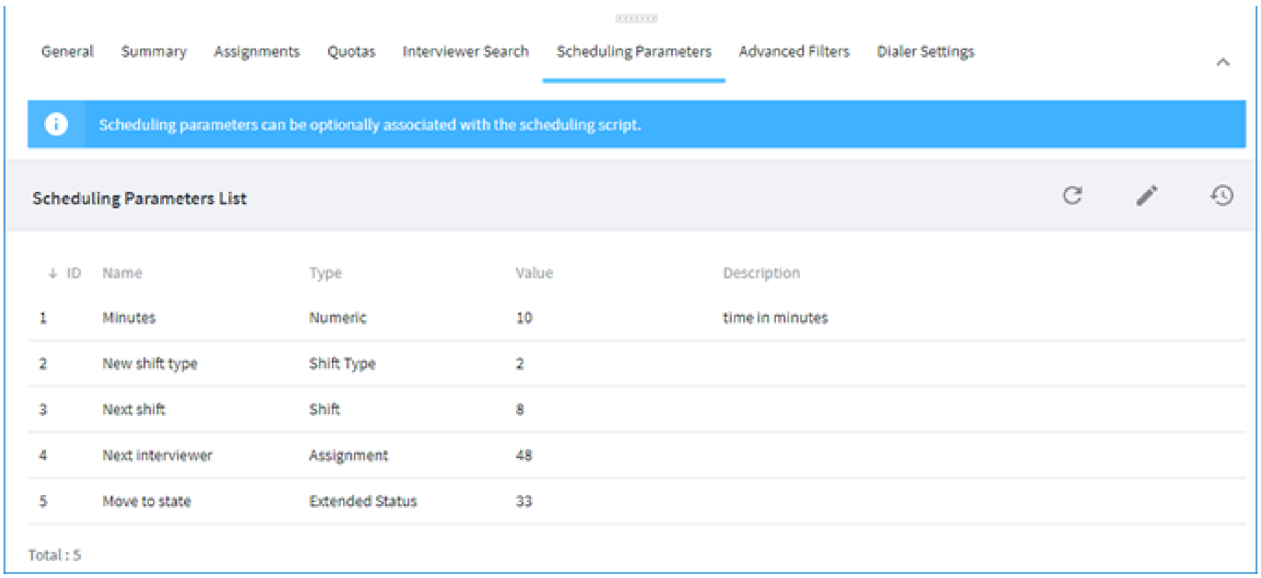


Figure 103 Viewing the parameter settings of the scheduling script currently used with the survey

Note that the tab will be empty if no parameters are applied to the scheduling script. If any parameters are used with the scheduling script actions the grid will contain the list of these parameters (as in the image above).

4. Select the parameter you want to edit and either double-click it or click the **Edit** button on the tab toolbar, or right-click the parameter in the grid and choose **Edit** from the context menu that appears.

   The Edit Parameter dialog opens.

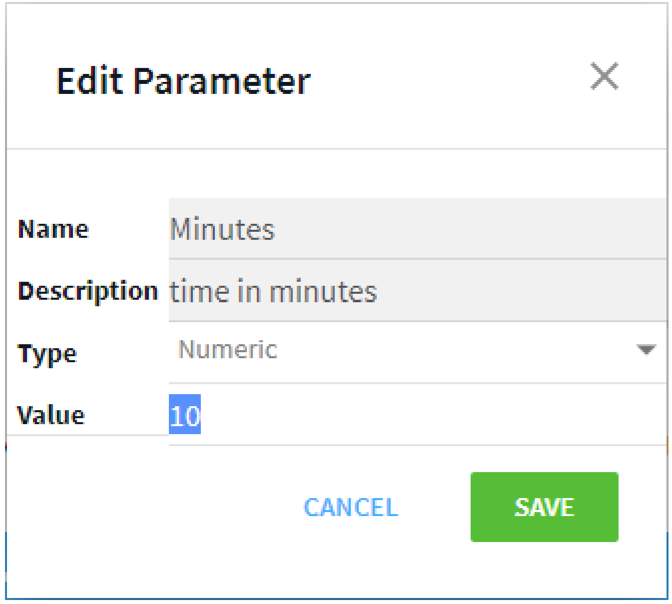


Figure 104 Editing scheduling script parameter from the Scheduling Parameters tab

This dialog displays the values that are currently used with the parameter you are modifying. All fields are accessible for editing.

5. Edit the fields as required and click **Save** to save the new values, or click **Cancel** to close the dialog and discard any changes.

To revert values of all the parameters used with the scheduling script to their defaults:

1. Click the **Reset to default values** button on the toolbar.

   ALL parameter values are reset to their defaults. The default values are the values that are currently specified on the Parameters tab of the scheduling script which is used with the survey (go to Parameterized Scheduling Scripts on page 217 for more information).

Important!
You cannot change the default parameter value itself from the Scheduling Parameters tab - here you can only specify another value for use with the current survey. Default parameter values can only be set using the Parameters tab of the scheduling script view.

3.3.11. Configuring the Survey Related Dialer Settings

You can configure the dialer settings differently for each survey. These settings will override the company-wide settings specified on the Dialer tab (of the Resources object tab). The dialer settings set is available on the Dialer Settings tab of the Survey Information view (go to Configuring the Survey Related Dialer Settings on page for more information).

Note: The dialer settings available on this tab will depend on the dialer type in use. Consult the documentation supplied by the dialer vendor for further information on the settings.
If the company does not use a dialer to conduct surveys, the Survey Information view will not contain the Dialer Settings tab.

To configure the survey-related dialer settings:

1. Display the Survey Information view for the required survey in the right bottom frame (see Viewing and Modifying a Survey's General Properties).
2. Go to the Dialer Settings tab.

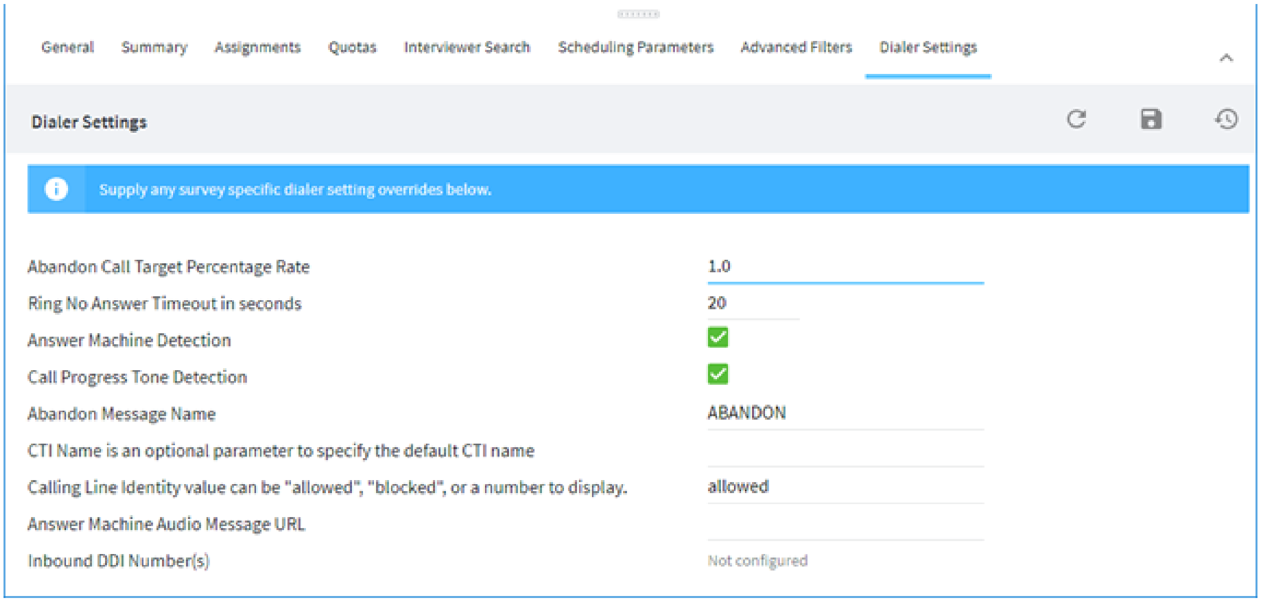


Figure 105 Configuring the survey related dialer settings

Edit the fields as required. All fields are optional. Note that some settings depend on parameters that are set up in the CATI Supervisor module. These include:

o**Inbound DDI Numbers** - an integrated dialer will contain a field showing DDI numbers associated with the survey (go to Configuring Inbound Call Settings on page 364 for more information).

3. To reset the values to the default, click the **Reset** button on the bottom right frame toolbar. When this button is clicked, all settings are reverted to the values that are currently specified on the Dialer tab > Dialer Settings view (go to Managing Dialers on page 350 for more information).

4. Click the **Save** button on the bottom frame toolbar to save the dialer settings.

3.4. Creating and Modifying Advanced Filters

A filter in CATI Supervisor is a ready-made expression that can be used to filter the interview/call objects. Filters are created using available variables and survey questions (which in fact are also variables) from the Forsta surveys.

Available filters are shown in the Advanced Filters tab (the Survey view) – each row in the grid corresponds to a certain filter.

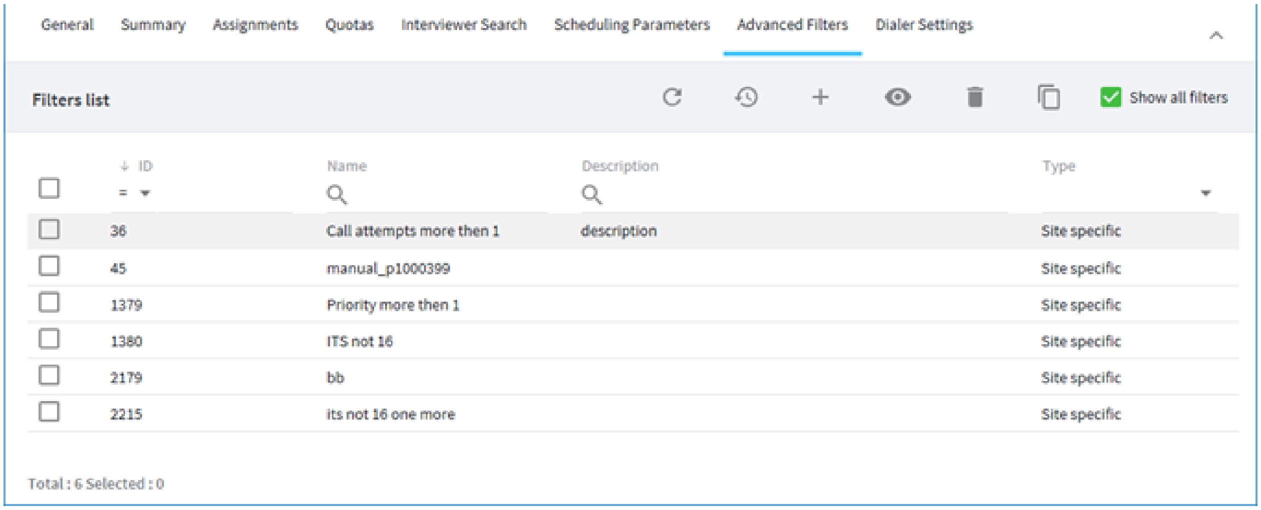
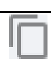


Figure 106 Survey view - Advanced Filters tab

The user can manage the list of filters using controls available on the Filters tab toolbar. Operations with filters can be performed either with the help of the buttons displayed above the grid, or using the context menus.

The following buttons are available:

Button	Description	Function
	REFRESH	Manually refreshes the filter list displayed in the grid
	CLEAR SELECTION	Deselects all the selected items in the grid
	ADD ADVANCED FILTER	Allows adding a new filter to the list. Displays the Filter Properties dialog
	PROPERTIES	Displays the Filter Properties dialog and allows the properties to be edited
	REMOVE FILTER	Removes the selected filter from the list
	COPY/MOVE FILTERS FROM SURVEY	Displays the Copy/Move Filters dialog that allows to choose the survey from which all filters would be moved/copied

The user can create two types of filters: site and survey specific. A site specific filter condition cannot contain a variable. After they are created, the site specific filters are available for use with any survey. On the contrary, a filter containing a survey variable in its expression, can only be used with the survey for which it was created - this is a survey specific filter.

Also the toolbar contains the Show all filters checkbox. When this box is checked, the list in the Filters tab will contain all site specific filters, and when the box is cleared, the filter list will contain only filters pertaining to the currently selected survey.

3.4.1. Viewing the Existing Advanced Filters

1. Right-click the row in the top right frame which contains details of the required survey and choose **View** from the shortcut menu, or click the **View** button on the toolbar.

   The survey information is displayed in the bottom right frame of the browser window.

   Go to the Advanced Filters tab to view the filter list.

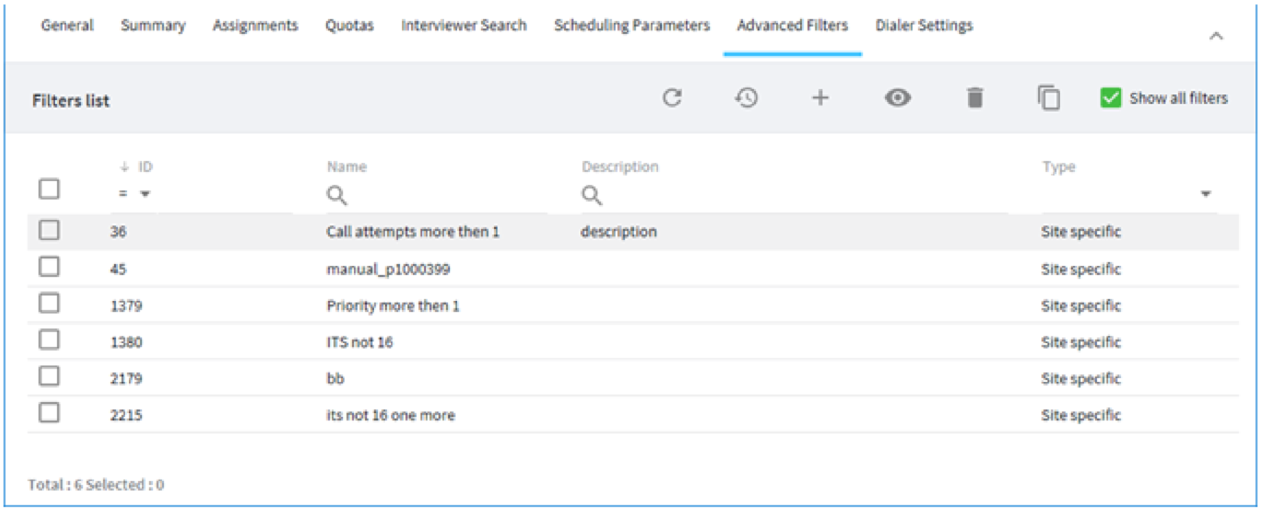


Figure 107 Survey properties - the Advanced Filters tab

2. The Advanced Filters tab contains a list of available filters. The list is organized as a grid.

   The grid contains the following columns:

   o**ID** – this is the filter ID.

   o**Name** – the filter name.

   o**Description** – the filter description

   o**Type** – the filter type (either site, or survey specific)

   To display all filters existing in the system, check the Show all filters box located above the grid. The filter list will then contain the survey-specific as well as site-specific filters. Site specific filter conditions do not contain any variables that originate from existing surveys - this guarantees that they can be used with any survey. If the Show all filters box is cleared, the grid will display the survey-specific filters only (filters containing variables originating from the current survey). The list is refreshed each time this checkbox is cleared or checked.

   To refresh the list manually, click the **Refresh** button .

3.4.2. Creating a New Advanced Filter

1. Right-click the required survey in the top right frame and choose **View** from the shortcut menu, or select the survey and click the **View** button on the toolbar.

   The survey information page opens in the bottom right frame.

2. Go to the Advanced Filters tab to view the advanced filter list.

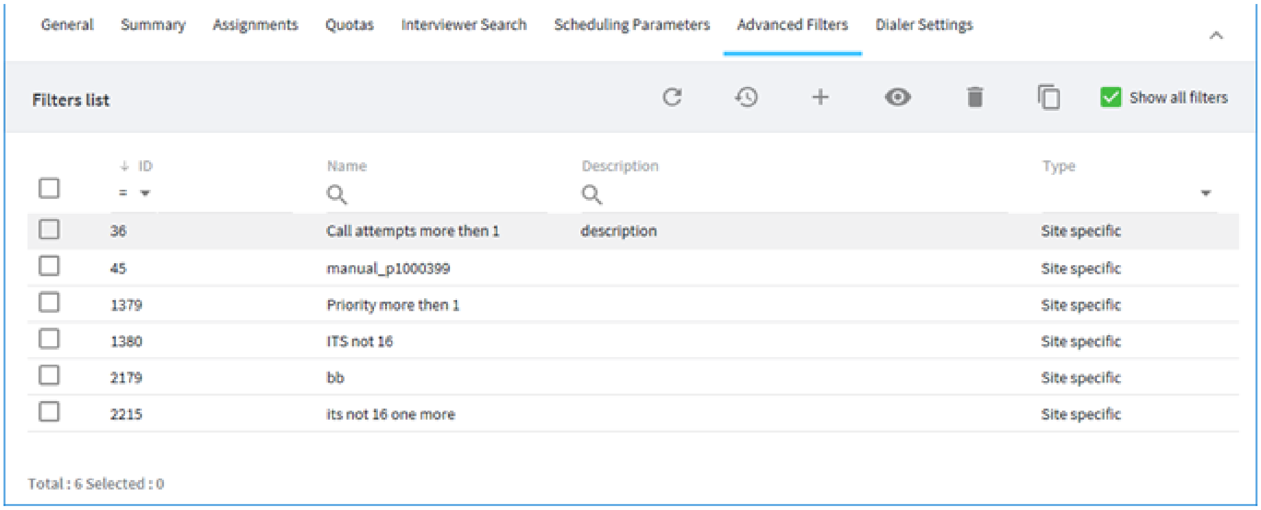


Figure 108 Survey view - the Advanced Filters tab

3. Click the **Add Advanced Filter** button  located above the grid, or right-click anywhere inside the grid and choose **Add Advanced Filter** from the shortcut menu.

   The Add Advanced Filter dialog opens.

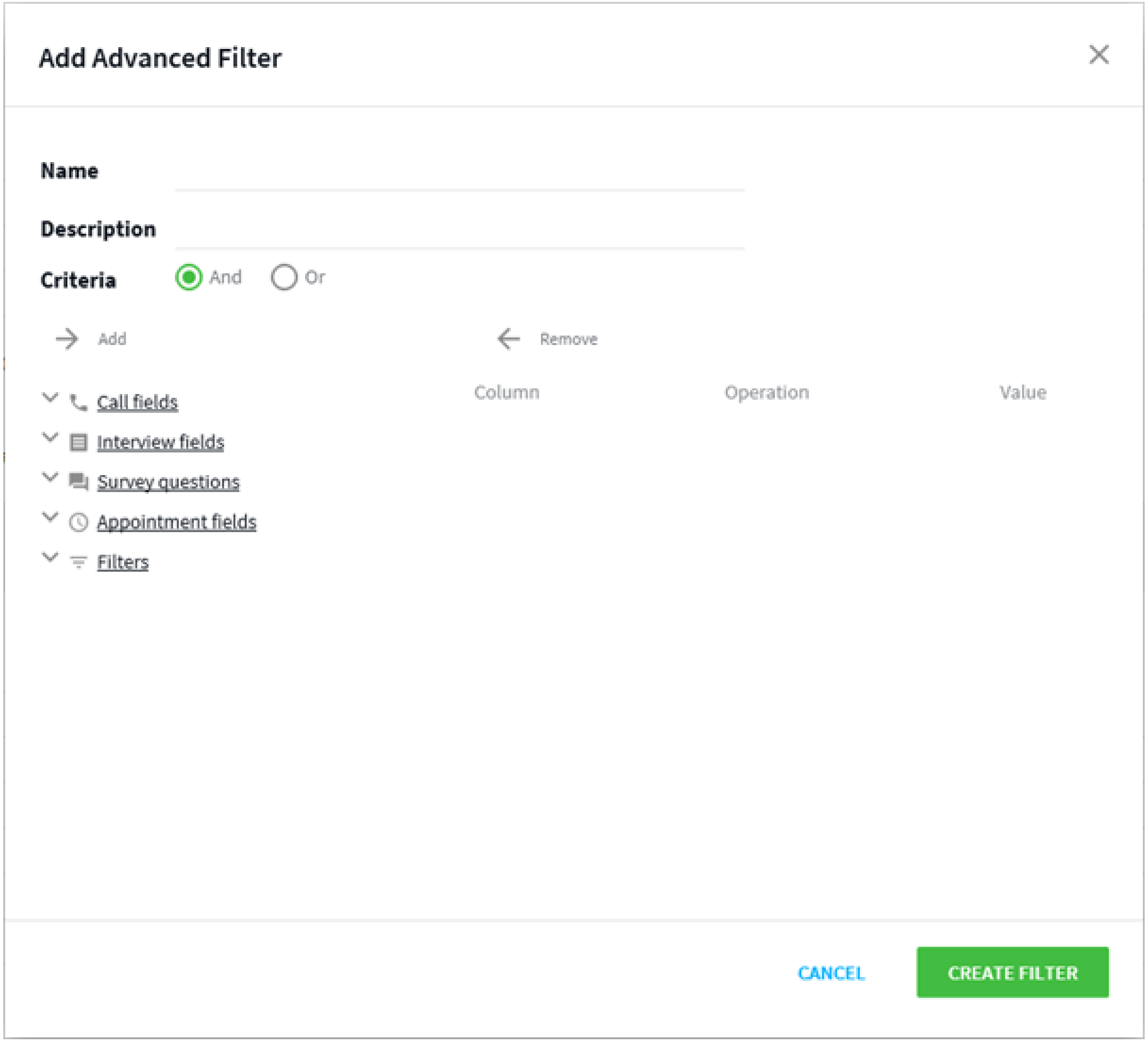


Figure 109 The Add Advanced Filter dialog (empty)

4. Specify the required parameters using the following fields in the dialog:

   o**Name** – the filter name.

   o**Description** – the filter description.

   o**Criteria** – use the **And/Or** radio buttons to choose the appropriate Boolean operator that will be used to combine specified conditions (when more than one filter condition is defined).

5. Specify a condition set that will be used as a filter.

   A filter can include as many conditions as required. A condition includes a variable name, a comparison operator, and a value to compare against.

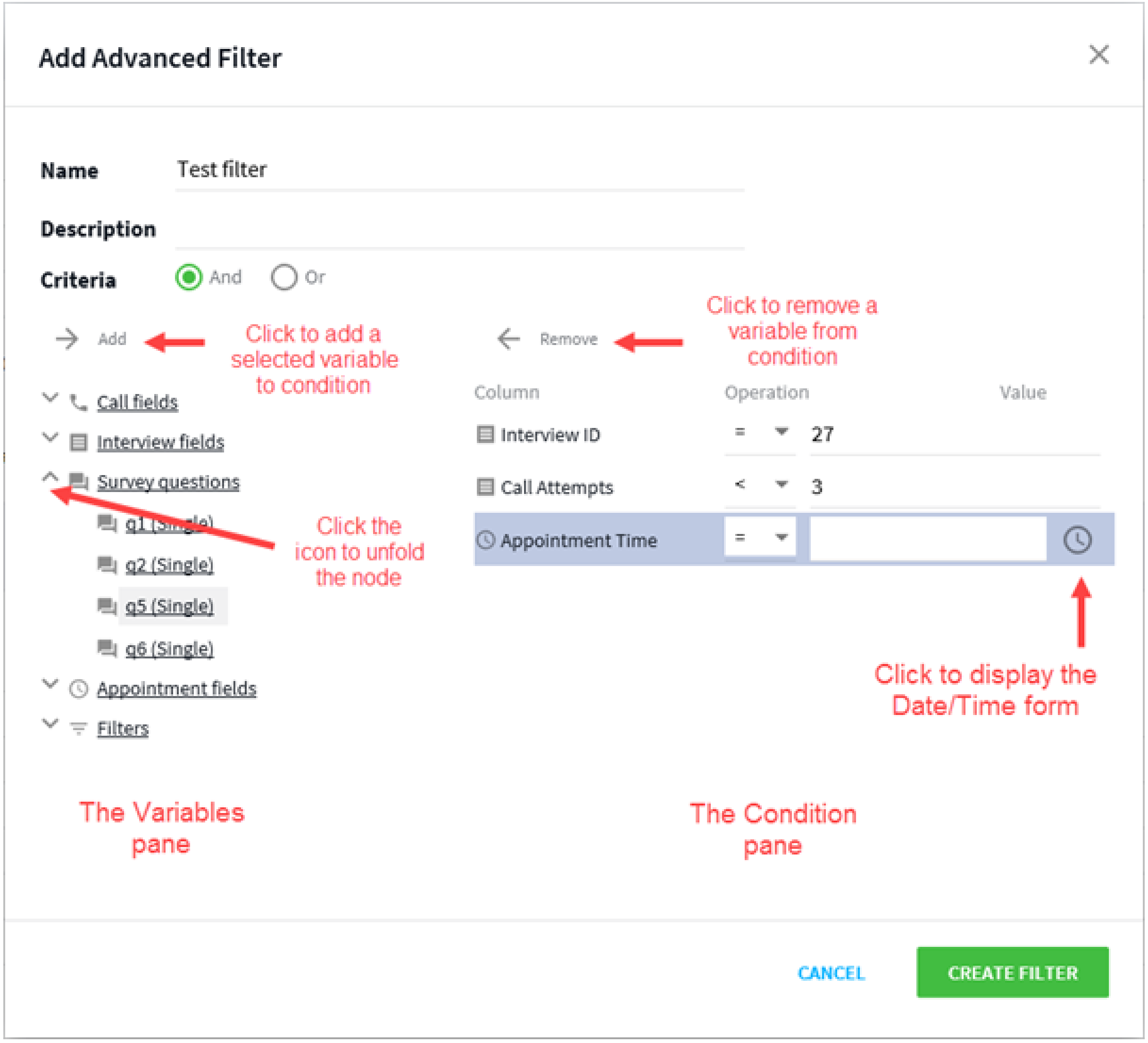


Figure 110 The Add Advanced Filter dialog controls

6. Select a variable in the Variables pane (the left pane in the dialog) and click the **Add** button, or double-click the variable.

   The selected variable is displayed in the Condition pane.

   The variables are specific types of data contained in the interview data tables. Usually these data types are presented as columns in these interview data tables. Variables (or data columns) are presented in the form of a tree list, with nodes containing variable types. Clicking an arrow sign in front of a node name unfolds a list of variables of a certain type. You can select only one variable at a time in the Variables pane to create a condition based on this variable. You can add more variables to the condition in the same way.

7. Select the required operator from the drop-down box in the Operation column, and specify the value (in the Value column) to compare the data against.

   If the value type requires a date and time, the field in the Value column contains a clock icon. Click the clock icon to display the Date/Time form.

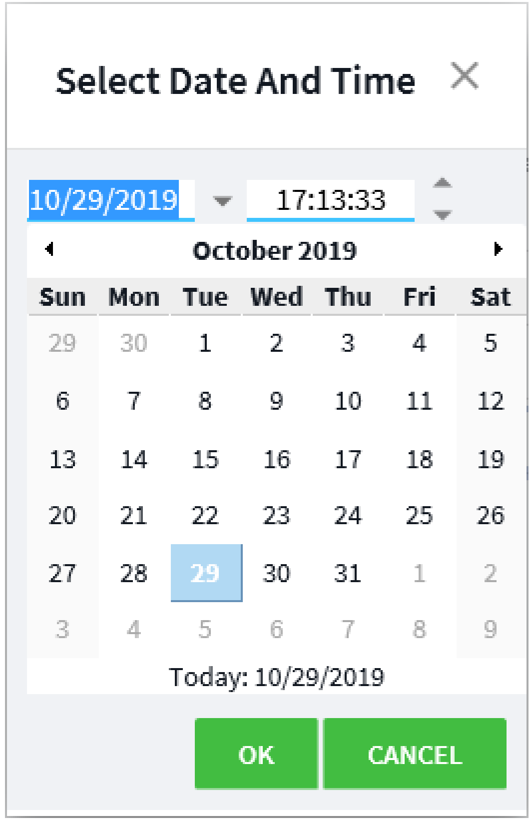


Figure 111 The Date/Time form

By default the form displays the current system date and time. Using the calendar form controls you can:

oChoose a date in the calendar by clicking on it.

oBrowse through months by pressing the arrow buttons above the weekday names.

oSelect a month from the drop-down list.

oSelect a year from the drop-down list.

Set the required time in the Time field using the spin controls.

8. Click **OK** to save the changes.

   The selected date and time will be used as the condition value.

9. Repeat step 5 to add another condition to the filter. You can add as many conditions as required.

   Newly added conditions are displayed in the list in the right frame in the order they were added.

Note that you can add a complete condition from any available filter. Select a filter in the Filter node. A filter condition you add using this method is not listed in the Condition pane - you must view the filter separately using the View facility to check it (go to Viewing and Modifying the Advanced Filter Properties on page 111 for more information).

10. Click the **Create filter** button to create the filter.

    The filter appears in the filter list.

3.4.3. Viewing and Modifying the Advanced Filter Properties

You can view and modify the properties of any advanced filter using the Edit Advanced Filter properties dialog. To modify the advanced filter properties:

1. Right-click the required advanced filter, and choose **View** from the shortcut menu or click the **View** button on the toolbar.

   The advanced filter properties area opens in the bottom frame.

2. Go to the Advanced Filters tab to view the filter list.

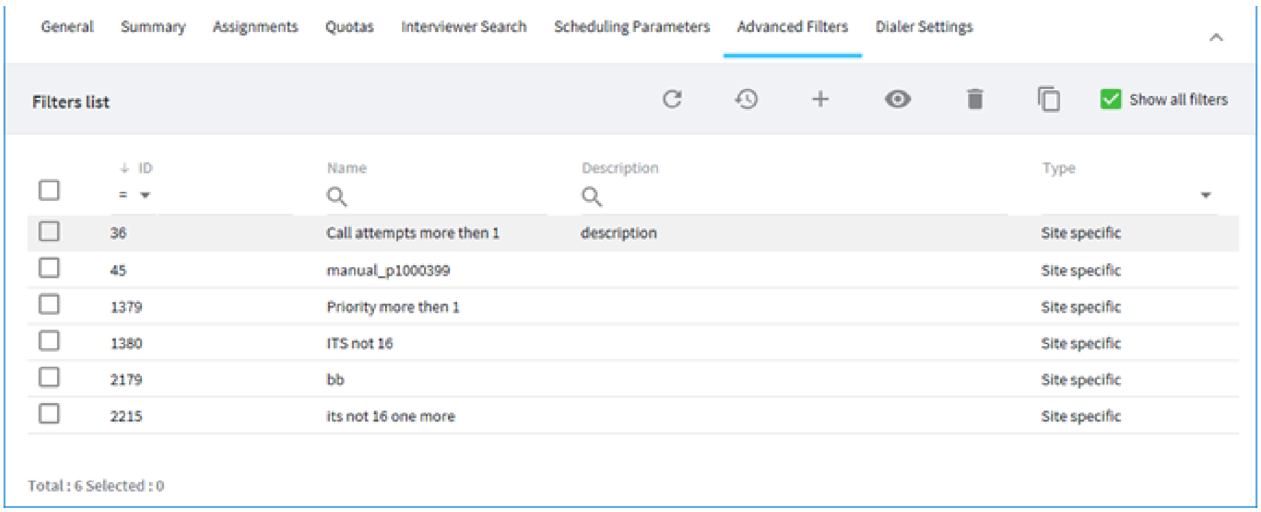


Figure 112 Survey properties - the Advanced Filters tab

3. Select the required advanced filter in the list and click the **Advanced filter properties** button on the toolbar, or right-click the required filter and choose **Advanced Filter properties** from the shortcut menu, or double-click the advanced filter.

   The Edit Advanced Filter dialog opens.

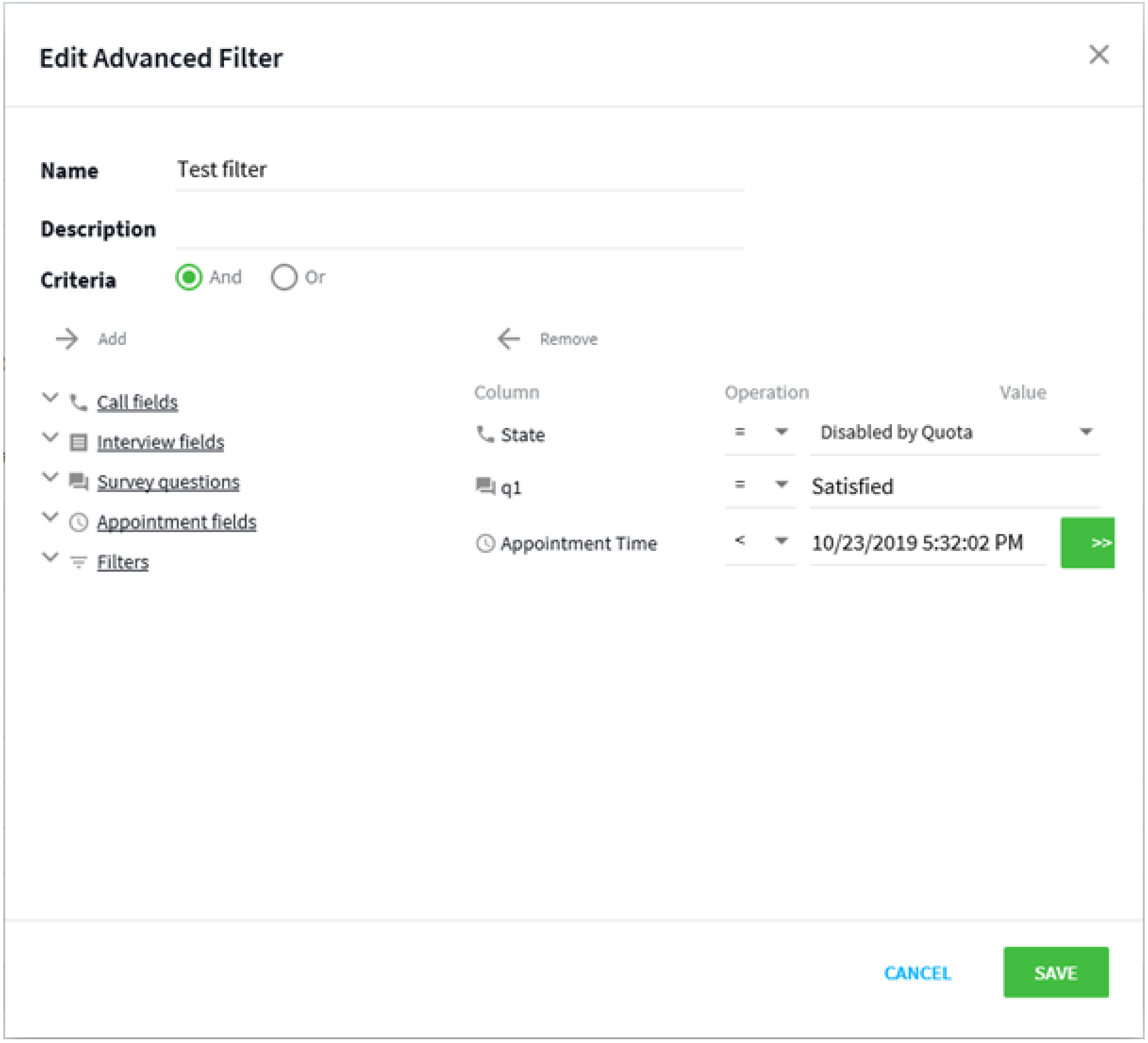


Figure 113 The Edit Advanced Filter dialog containing filter parameters

Here you can edit the name, description, filter criteria and condition, add a new variable from the Variables pane, select a variable in the Condition pane and edit any parameter (go to Creating a New Advanced Filter on page 107 for more information).

3.4.3.1. Copying and Moving an Advanced Filter from Another Survey

Survey-specific advanced filters that were created for one survey can be re-used in another survey. To do this you can copy or move advanced filters from one survey to another.

Copy and move operations are available only for survey-specific filters - site specific filters are already available for use with any survey.

Note: Copied/moved filters are not verified in the course of the copy/move operation, and these filters may for example reference variables which are not available in the target survey. In the event of inconsistencies, error messages will be generated when they are used in an operation.

Note that the Copy/Move filters operation copies or moves ALL survey specific filters existing for the selected survey.

To copy or move the existing advanced filters from the selected survey:

1. In the Survey list (top frame) select the "destination" survey to which the advanced filters are to be copied or moved.
2. Open the survey in the View mode and go to the Advanced Filter tab (go to Viewing and Modifying the Advanced Filter Properties on page 111 for more information).
3. Click the **Copy/Move filters from survey** button .

   The Copy/Move filters from survey dialog opens.

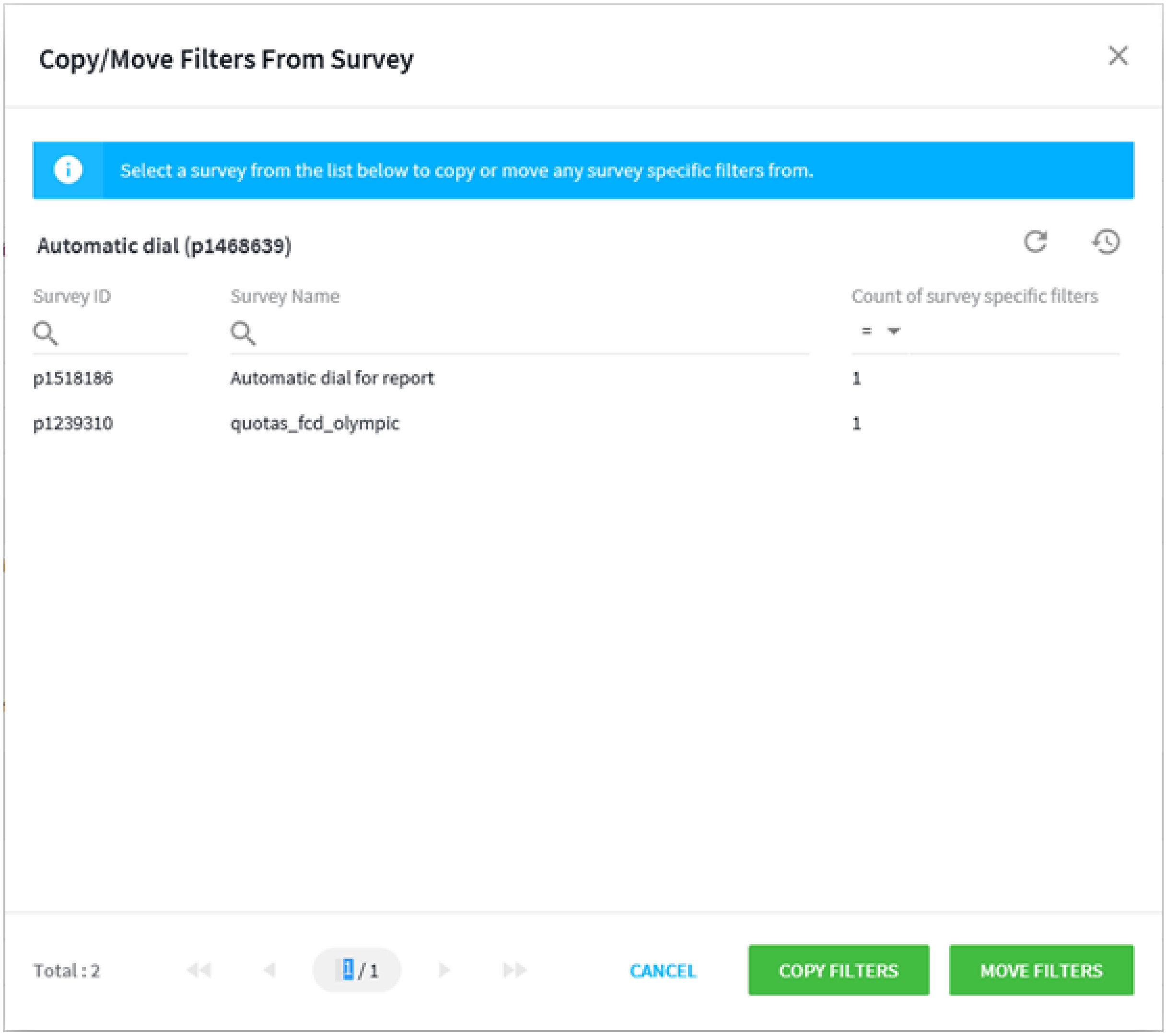


Figure 114 Copying or moving advanced filters from the selected survey to the current survey

This window lists all Forsta projects containing survey-specific filters to which you have access. The grid shows the project IDs, project names and the number of survey-specific filters contained in each survey. If you choose a survey to copy/move survey-specific filters from, all the survey-specific filters will be copied from this survey.

4. Select a survey you would like to copy/move filters from.
5. Click either **Move Filters** or **Copy Filters** as appropriate.

When copying, the Copy/move filters... dialog closes and the Filters tab in the current survey properties refreshes to show the copied filters in the filter list. The Move operation requires additional confirmation - when the **Move Filters** button is clicked a confirmation dialog opens.

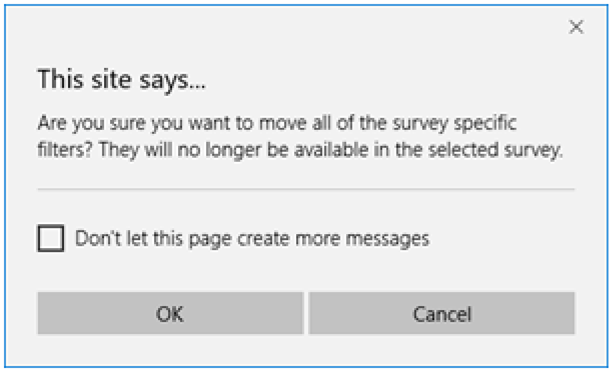


Figure 115 Confirming the Move Filters operation

6. Click **OK** in this dialog to proceed with moving the filters.

   The Copy/move filters... dialog closes and the Filters tab in the current survey properties refreshes showing the moved filters in the filter list.

3.4.4. Deleting an Advanced Filter

Any created advanced filter can be deleted from the system. You can only delete a filter when it is not currently used as a configuration parameter with any other system object.

To delete an advanced filter:

1. Right-click the survey in the top frame which contains the advanced filters you need and choose **View** from the shortcut menu, or click the **View** button on the toolbar.

   The survey information is displayed in the bottom frame of the browser window.

2. Go to the Advanced Filters tab to view the advanced filter list.

3. Select the required filter in the list and click the **Remove** button on the toolbar, or right-click the required filter and choose **Remove filter** from the shortcut menu.

   The filter is removed from the filter list and from the system. Note that a deleted filter cannot be restored.

3.5. Viewing the Distribution of Dialer Calls

The supervisor can view how many calls were requested and delivered to interviewers during specified periods of time. This view is complemented with two breakdown views which provide additional details.

This feature is available only for surveys that are run in the "Predictive" dialing mode (selected in the Forsta Authoring module, refer to the Professional Authoring User Guide for information).

"Dialer" calls are calls that are automatically prepared by the system when it maintains a queue of interviews which are most likely to be delivered to interviewers. These calls can also be viewed in the Call Management window when the "High Priority" option is selected as the State filter (go to Call Management on page 117 for more information).

The view includes three stacked grids.

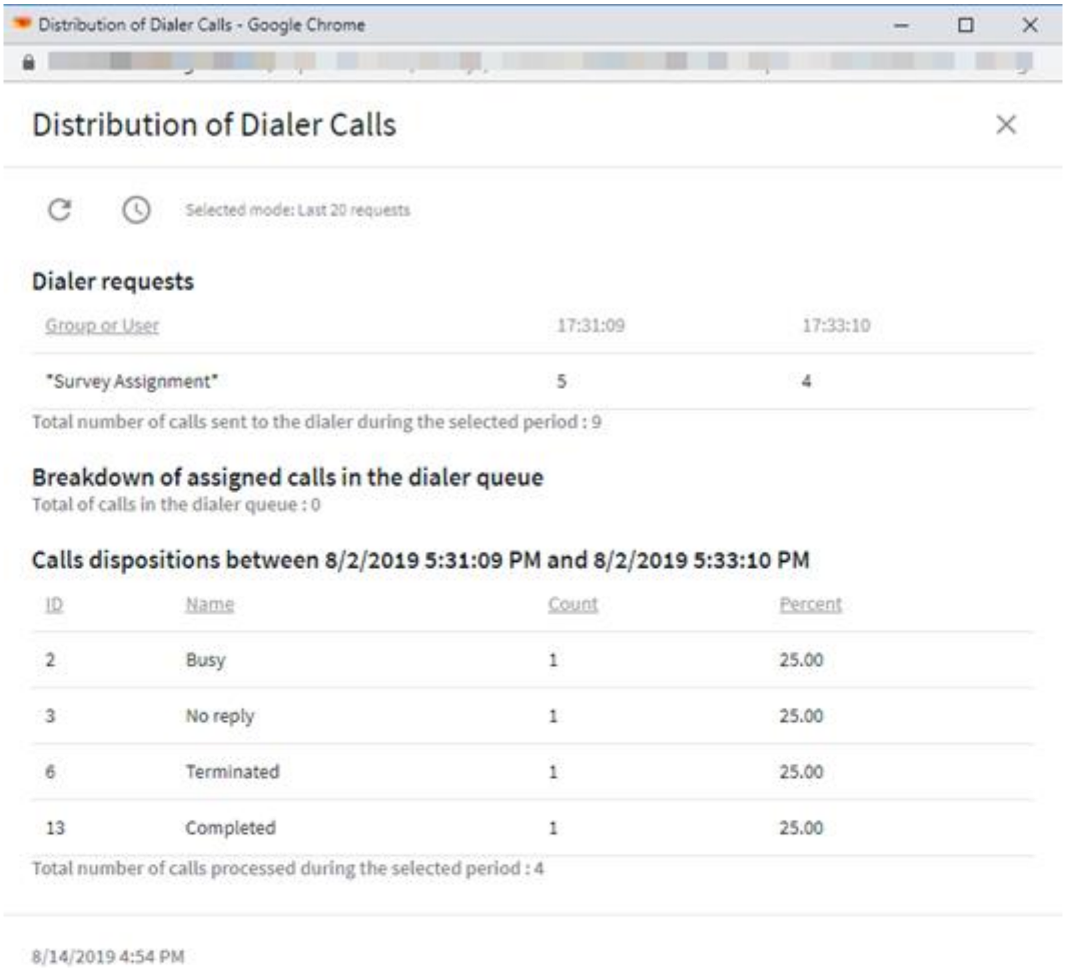


Figure 116 Viewing distribution of dialer calls

- The upper grid provides information regarding the number of calls that were returned by the system in response to requests made by the dialer during the time period selected. This view is broken down by requests and shows the list of interviewers/groups to whom the calls were delivered.
- The center grid presents the call list broken down by assignments - calls that are assigned to a survey, assigned to interviewers or to interviewer groups.
- The lower grid shows the resulting disposition of all listed calls. This view breaks down the call list by the call status - what the status of the call had been when it was returned by the system.

By default this view shows the results of the last 20 requests made by the dialer. The supervisor can also specify a start time from which the list of requests is to be shown.

To view distribution of dialer calls:

1. Display the list of surveys in the top right frame by selecting the **Surveys** object in the left Navigation frame.
2. Right-click the details of the required survey and choose **Distribution of Dialer Calls** from the shortcut menu.

   The Distribution of Dialer Calls window opens. If no call history was recorded for the survey, the Distribution of Dialer Calls view will appear empty and the grids will only provide information that there were 0 requests made during the selected period.

If the selected survey is configured to be dialed in a mode other than Predictive, an error message will appear informing the reader that this view is available only for Predictive surveys.

3. By default the view is set to show the 20 last requests. To specify another period for analysis click the **Time** button on the toolbar.

   The time specification dialog opens.

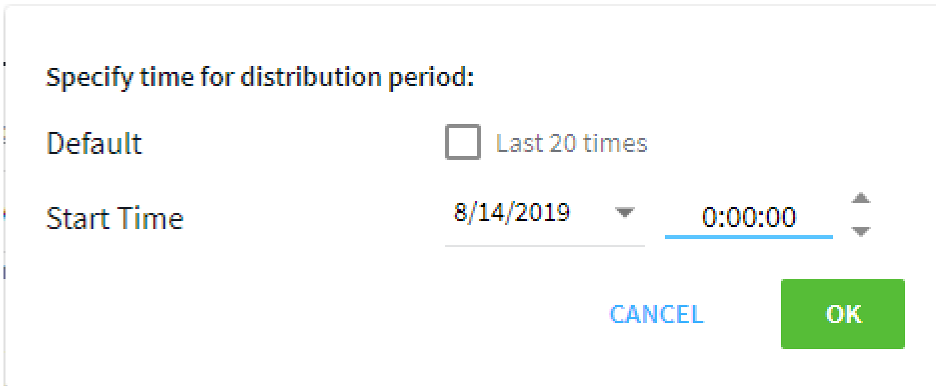


Figure 117 Specifying the start time for viewing active call distribution

4. To use the default setting leave the **Default** box checked (the Last 20 times setting). Otherwise clear this box and choose the start date and time from the Start Time drop-down list that appears after the Default box is cleared.

5. Click the **Refresh** button on the toolbar to update the view.

3.6. Call Management

Using the Call Management window you can explore the interview/call details relevant to the selected survey.

This vital part of the CATI Supervisor module allows you to monitor and manage the interviewing process from a single convenient interface. Here you can observe and modify the interview/call state, change different interview/call properties and perform a number of other related tasks.

To that end the CATI Supervisor module provides you with a number of dedicated dialogs, which are invoked either with the help of context menu commands or toolbar buttons.

Note: We suggest that you picture an "interview" and a "call" object as a single "business object" with a specific life cycle. Most of the time in CATI the term "interview" is used in pair with the term "call". In fact these are different objects although they always appear in pairs, and sometimes can be seen as a single entity. While the first serves as a starting point for the second, the second cannot exist without the first. That is, an "interview" forms the basis for a "call", and a "call" simply cannot be created when there is no corresponding "interview".

Using the Call Management dialog you can perform a wide range of operations with interview/call objects, such as:

- View the interview/call list using a number of viewing options.
- View the interview/call history.
- View and modify the interview/call properties.
- Review interview answers using a specialized utility called the Reviewer (go to Reviewing Interviews with the Reviewer Application Module on page 153 for more information).
- Assign/deassign interviewers to surveys (go to Survey Assignments on page 178 for more information).

Most of the interview/call management procedures are performed using of the dedicated dialogs.

3.6.1. Viewing the Interview/Call List

You can view the complete list of interviews and calls for the current survey. The interview/call list is displayed in the Call Management window. The current survey name is shown above the toolbar.

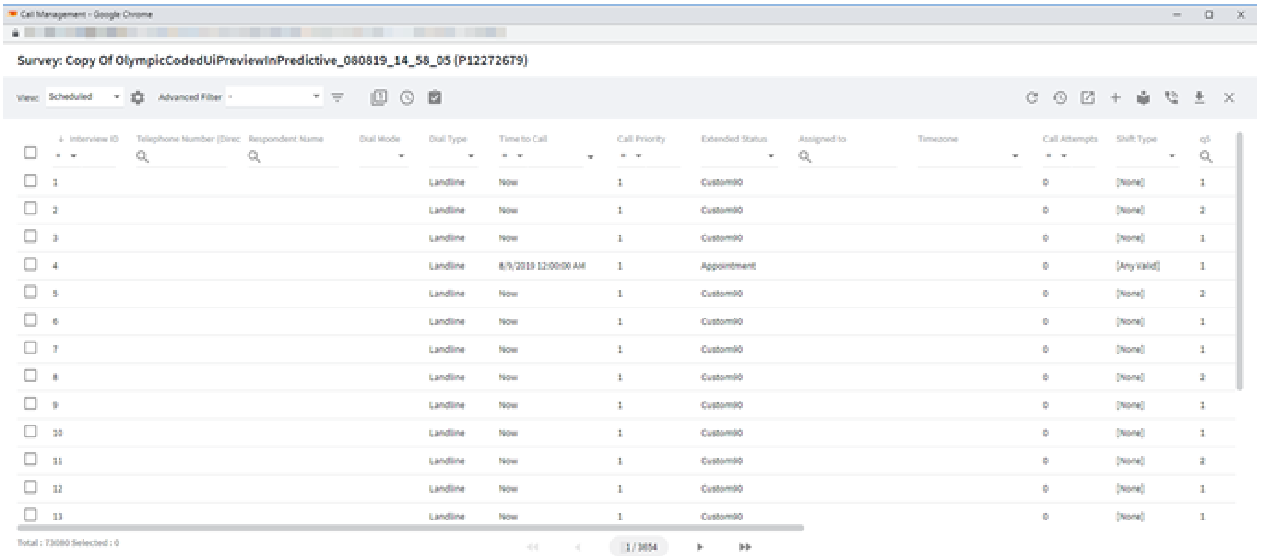


Figure 118 The Call Management dialog

By default the list displays calls in the "Scheduled" state (the state can be selected in the View drop-down list above the grid). Available views are described below. The following controls are available for displaying data in the interview/call list:

Control element	Name	Function
Drop-down list	View	Displays interviews/calls in the currently chosen state whilst hiding the rest
	Customize view	Allows choosing which columns are displayed in the Call Management window in the Scheduled view and saving this layout for future use
Drop-down list	Advanced Filter	Allows selecting an expression for filtering the displayed interviews/calls
	Add Advanced Filter	Allows adding an advanced filter to the call management view.
	Show Time in Respondent time zone	Toggle button. When enabled displays time considering the respondent time zone.
	Add question	Adds variable columns to the interview/call list.

Control element	Name	Function
	Surveys	Displays the Select Survey dialog. This allows you to choose another survey to be loaded in Call Management.
	Retrieve audio	Toggle button. When enabled shows whether recorded interviews contain an audio track. Available only in the "All" state view.
	Refresh	Updates the interview/call list.
	Clear selection	Deselects all the selected interviews/calls in the list.
	Go to Reviewer	Displays the Reviewer module window with the list of sessions shown
	Add interview/call	Allows adding a new interview/call and configuring its properties
	History	Displays the History window. Provides information regarding call attempts made and allows viewing captured data regarding certain interview questions which are contained in the special loop called "callhistoryinfo"
	Active calls	Displays the Active Calls window showing the number of calls currently ready to be delivered to interviewers
	Interview history	Displays the Interview History window which shows information contained in questions that were added to the "callhistoryinfo" loop
	Export	Allows exporting the interview/call list.
	Close window	Closes the Call Management window.

The total number of interviews/calls and the number of selected interviews/calls are displayed in the status bar.

To view the interview/call list:

1. Right-click the row in the grid in the top right frame of the main CATI Supervisor window which contains details of the required survey, and choose **Call management** from the shortcut menu, or click the **Call Management** button  on the toolbar.

   The Call Management window opens.

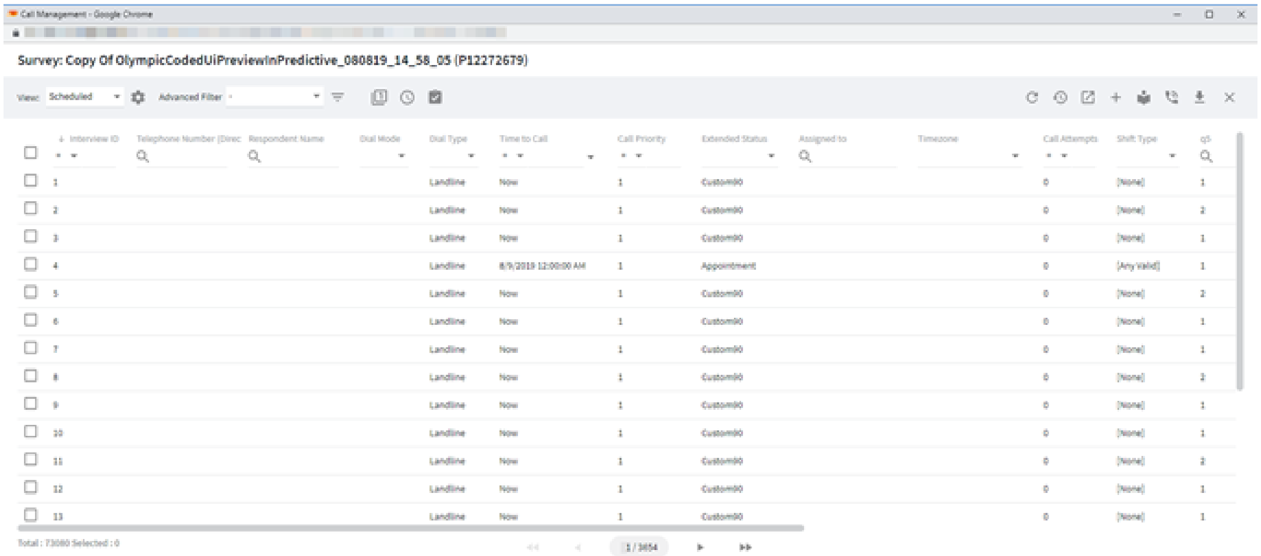


Figure 119 The Call Management window

This window lists the properties of the selected interviews/calls. Four separate interview/call views are available from the View drop-down box at the top of the list, or you can select to see all four interviews/calls views as one list. The options are:

- **Scheduled** - these are planned (scheduled) to be delivered to an interviewer at the specified time.
- **Not Scheduled** - lists only interviews that are no longer scheduled. These interviews were once scheduled and were classified as calls, but scheduling was canceled for some reason. For example these may be interviews with the Extended Statuses Completed, Terminated etc.
- **High Priority** - a scheduled call can be given a high priority based on specified criteria, for example the Interview ID value. Interviews with lower ID values are more likely to be shown in the High Priority list. Note that "High Priority" is not a State but rather a group of calls that are likely to be delivered to the interviewer in the near future.
- **Sent to Dialer** - if the survey dialing mode is set to Predictive or Hybrid (Preview in a Predictive survey), the calls that are sent to the Dialer are shown in the **"Sent to Dialer"** list. Calls that have been sent to the dialer cannot be modified until they have been returned to Forsta Plus, so all actions in this view are disabled.
- **All interviews/calls** - displays all interviews and calls that currently exist for the selected survey.

Scheduling means that an interview is configured to be delivered to an interviewer at a specified time interval (shift). The actual interviewer does not need to be defined; any will do. The interview is then allocated a "Call" property. Calls are interviews which can be delivered to an interviewer and conducted by them.

Note that calls that are being conducted at the current time by the interviewer are not shown in the Call Management window. These calls can be viewed in the Interviewer Activity List window (go to Monitoring Interviewers and their Work on page 303 for more information).

The Call Management window can also show "Disabled" calls. These are calls that are flagged to prevent them being delivered to the interviewer. Disabled calls are displayed only in the Scheduled and All views. In the Scheduled view, disabled calls are grayed out and an icon is shown in the "State" column. Disabled calls are also displayed in the All view list but they are highlighted in this view (go to Disabling and Enabling Calls on page 131 for more information).

The columns displayed in the window depend on the state selected, so the grid may exceed the width of the window. You can adjust the column widths, and this adjustment will be remembered when the Call Management window is closed and reopened.

Three basic property sets are predefined: Interview, Call, and Appointment. The Interview and Appointment property sets are displayed for interviews/calls in all states, the Call property set is displayed only for calls in the Scheduled and High Priority states.

The following properties are displayed in the Interview set:

- **Interview ID** – this is the ID of the interview record in the queue.
- **Telephone number** – this is the telephone number of the respondent (if known).
- **Respondent name** – this is the name of the respondent (if known).
- **Timezone** – this is the timezone of the record.
- **Extended Status** – this is the Interview Extended Status value for the call.
- **Call Attempts** – this is the number of call attempts made.
- **Assigned To** – this is the list of persons/groups to which this call is currently assigned.
- **Time of last call** – this is the time the record was last called.
- **State** – indicates whether the call is disabled or not, and whether it was disabled by user or as a result of the Quota management rules application. Disabled calls are highlighted in yellow or red - see (go to Disabling and Enabling Calls on page 131 for more information) for details. The column and highlighting are shown only for the "Scheduled" calls.
- **Dial mode** – indicates the dialing mode for this interview. Shown only for the "Sent to Dialer" interviews.
- **Dial Type** – indicates the dial type for this interview. Shown in all views.
- **Review status** – this column provides tracking information showing the review progress of the interview. The following statuses are shown: - *Not sent to review* (Review session has not been created for this interview); *Sent to review* (Review session has been created for this interview); *Review session started* (one or more interview questions has already been reviewed, but the session has not been completed); *Review session completed*. Shown only in the "All" interviews/calls view.

The following properties are displayed in the Call set:

- *Call Priority* – this is the priority value of a call where a value of 1 is the lowest priority and any value higher than 1 can be used to give greater priority. Most call statuses have a default value of 1 assigned however appointments are an exception and have a default value of 1000 for high priority.

Note: A value of 0 indicates that the call has no priority and should never be called.

- **Time to call** – this is the time the call is due.
- **Expiration Time** – this is the time when the call expires.
- **Shift type –** a shift type defined for this call by a corresponding scheduling script.
- **Assigned To -** this is the group/person the call is assigned to.

The following properties are displayed in the Appointment set:

- **Appointment Time** – this is the time the appointment is due.
- **Appointment Expiration** – this is the time when the appointment expires.

4. You can specify which columns are displayed in the table and in which order, when you choose a **Scheduled** view from the "View" drop-down list (go to Customizing Call Management Scheduled Views on page 122 for more information).

5. Click the **Refresh** button on the toolbar to update the interview/call list.

Note: You can use the search facility to find an interview/call by looking for specific properties. Each column has a field below the column heading; enter values in these fields to filter the current list. Use the asterisk symbol * as a wildcard where you don't need to match the entire string value. For example entering *321 in the telephone number column will return a list of all records where the number contains 321. To apply an exact match filter, enclose the search string in double quotes. To filter on empty values, enter two adjacent double quotes "".

3.6.2. Customizing Call Management Scheduled Views

You can create custom views of the scheduled calls list. These views will then become available in the **View** drop-down list. You can customize the Scheduled view by hiding or including columns or changing their order. You can also set any custom view as default; it will then be displayed first each time the Call Management interface is opened.

Any custom view created by one supervisor will be accessible for all supervisors in the same company.

1. To customize a view on choosing the Scheduled view click the **Customize View** button next to the View drop-down list and select **Add** from the drop-down menu.

   The Create Custom View overlay dialog opens.

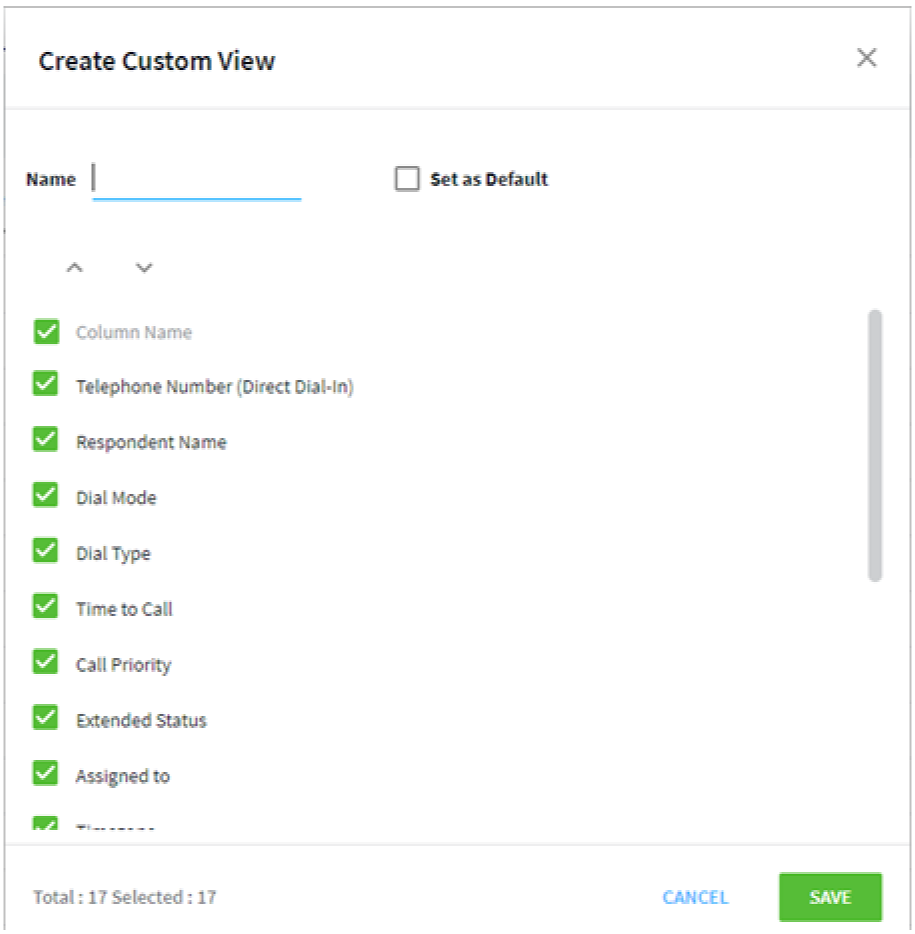


Figure 120 Customizing Call Management view

   This dialog lists the names of all columns currently available for the Scheduled View.

2. Check the box for each column you want to be displayed in this view; clear the boxes for the columns you want to hide from this view.

3. Select a column and click the **Up** ^ or **Down** ˅ button to move that column one position to the left (Up) or to the right (Down) in the table. The "Place Holder for Question Variables" item allows you to adjust the order of columns for any question variables that might be added to the view; these can be re-positioned as a block.
4. Enter a name for your custom view in the Name field.
5. Check the **Set as Default** option if you want this customized view to be displayed by default when you open the Call Management window.
6. On completion click **Save**.

   The name of the saved table layout becomes available in the View drop-down list.

When you choose a customized view from the View drop-down list, it can be edited or deleted. Click the **Customize View** button to reveal the drop-down menu. For an existing customized view this menu contains three commands: Add, Edit and Delete.

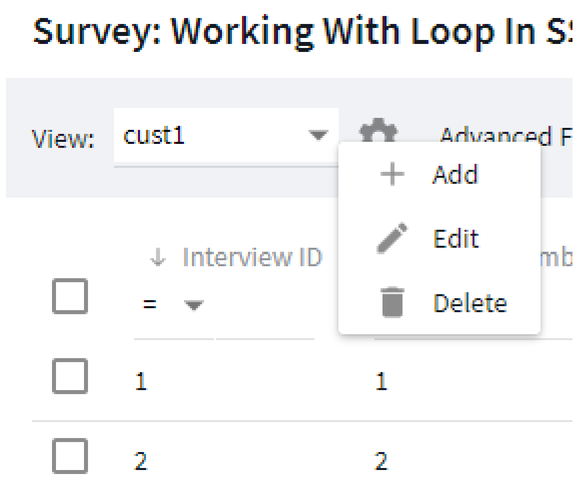


Figure 121 Customize View drop-down menu commands

Choose **Delete** to delete the currently selected custom view, or choose **Edit** to modify it.

If you click **Edit**, the Edit Custom View overlay opens. This is similar to the Create Custom View dialog described above. Here, the Column visibility, position, the View name and "default" option are editable. If you change anything, on completion click **Save**.

3.6.3. Changing the Survey in Call Management

You can change the survey you are currently working with in the Call Management window. This allows you to work with related interviews without having to close the Call Management window and repeat the survey selection procedure.

To change a survey while in the Call Management window:

1. Click the **Surveys** button in the Call Management window toolbar.

   The Select Survey window opens.

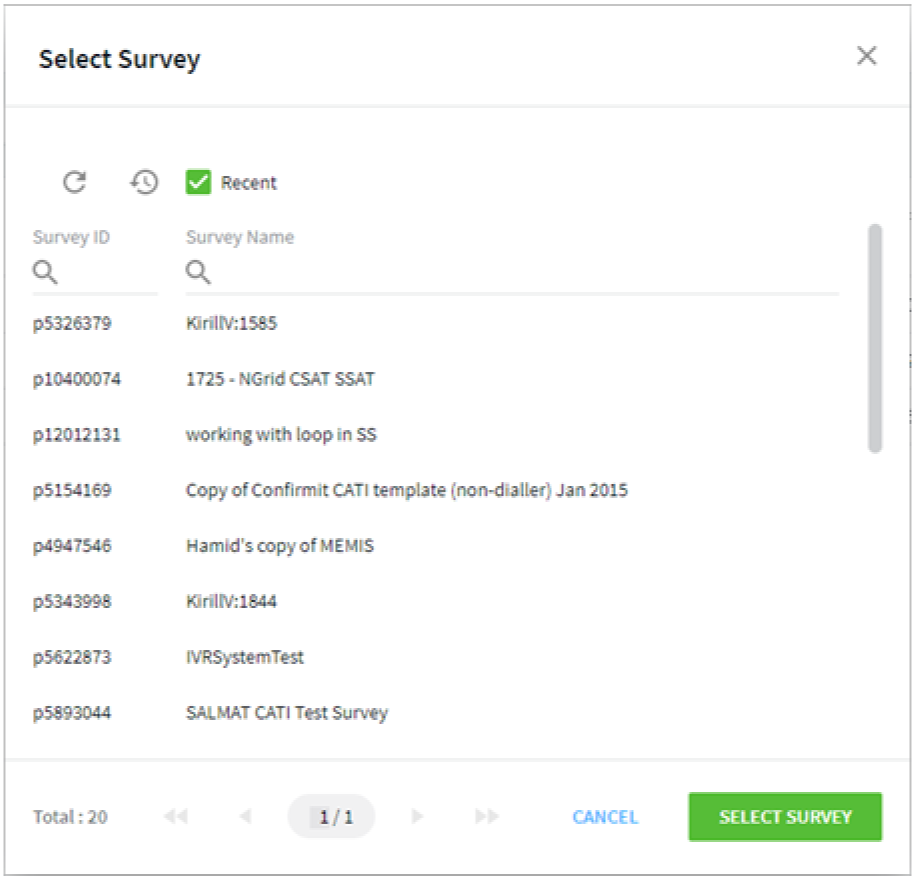


Figure 122 The Select Survey window

2. To select a survey, click on its name then click the **Select Survey** button in the bottom of the window.

3. To simplify the process of selecting a survey, you can have only "recent" surveys presented in the list. Recent surveys are surveys which contain interviews that had their extended status changed recently. When the Recent box is checked, a maximum of twenty recent interviews are shown.

Note: Any survey can be used with different call centers, so it's interviews may change their extended status in one call center while they retain the original value in another call center. Note that in this case the change of the extended status is sensed only in the call center where the change took place; in other call centers that use this survey, the change will not be applied and the survey containing the interview will not be treated as "recent".

3.6.4. Viewing the Interview/Call History

The Interview History window provides you with a detailed list of all actions and operations that have been performed with the current interview, and also provides access to captured data provided by interview questions which are contained in the "callhistoryinfo" loop.

The Interview History dialog contains three tabs:

- The "Call Attempts" tab provides access to basic information regarding all the call attempts made.
- The "Extended Call History" tab displays a list of all operations that involved changing the call/interview properties.

- The "Call History Loop" contains data only if the survey was designed using a template that included the "callhistoryinfo" loop. If so then this tab shows captured data regarding the interview questions that are contained in this loop.

3.6.4.1. The Call Attempts Tab

The "Call attempts" tab displays information about:

- Any calls processed by an interviewer;
- "Not Connected" calls processed by a dialer (for predictive and non-predictive surveys).

The first record in the list will always be addition of the interview to CATI (this is the moment it was first assigned the Fresh Sample extended status).

Note that manual rescheduling, priority changes and other operations that are performed through the CATI Supervisor interface are not reflected in this view. Here you can see only the list of calls that were conducted using the CATI Interviewer Console. These and other operations are shown on the "Extended call history" tab - see below.

To update the tab manually, click the **Refresh** button on the toolbar.

To view the list of call attempts:

1. Display the Call Management window, and choose the required interview/call (go to Viewing the Interview/Call List on page 118 for more information).
2. Select an interview or a call in the Interview/Call list and click the **History** button on the toolbar.

   The History page opens.
3. Go to the Call Attempts tab.

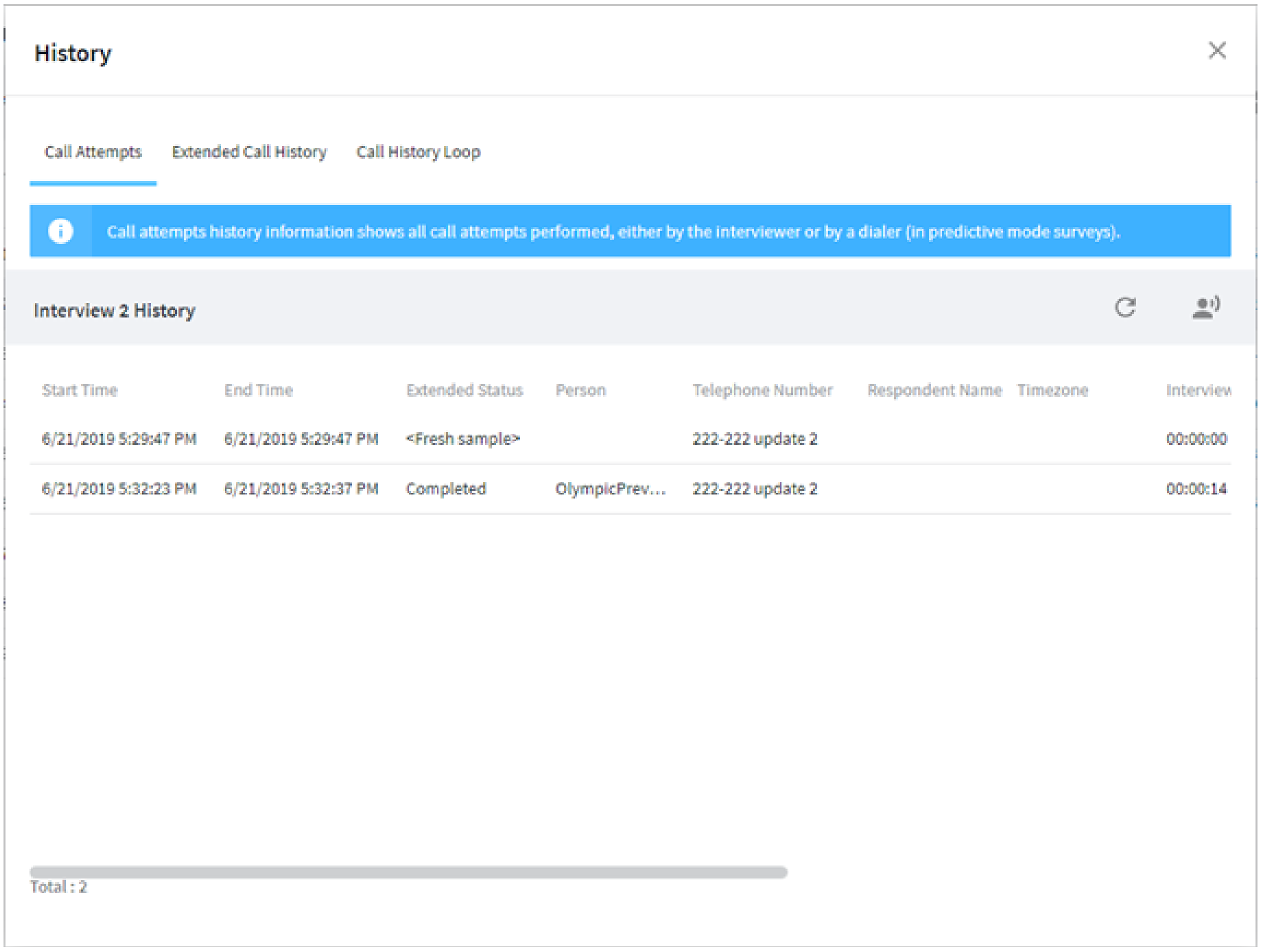


Figure 123 The History page with the Call Attempts tab displayed

The information in the Call Attempts tab is organized as a table where each row holds data regarding a single call attempt.

The following data is displayed in the table:

- **Start Time** – this is the start time of the call.
- **End Time** – this is the finish time of the call.
- **Extended Status**– this is the numeric Extended Status value for the call.
- **Person** – this is the name of the person who has changed the call state (made a phone call as the interviewer).
- **Telephone Number** – this is the respondent’s telephone number (if known).
- **Respondent name**– this is the respondent’s name (if known).
- **Timezone** – this is the timezone of the call.
- **Interview Time** – this is a time period between Start time and Finish time, which includes call initialization, its processing in the engine module and saving the data.
- **Wait Time** – this is the time period between completion of the previous call and the start of the next scheduled call.

- **Appointment time** – this is the time when the appointment is due (if one was made for this call).
- **Appointment expiration** – this is the time when the appointment expires (if one was made for this call)
- **Call Center** - this is a Call Center specified for the interview/call on completion of the event.

To update the tab manually, click the **Refresh** button on the toolbar.

3.6.4.2. The "Extended call history" tab

The Extended call history tab lists all operations performed with the current interview by scheduling rules, supervisors using call management actions, or internal system operations such as "Filtered by call delivery" or "Quota balancing".

Note that not all operations change the extended status of a call. If such an operation is listed, it is shown with the Extended Status column blank.

To view the extended history for the current interview:

1. Display the Call Management window, and choose a required interview/call state (go to Viewing the Interview/Call List on page 118 for more information).
2. Click the **History** button on the toolbar.

   The History dialog opens.
3. Choose the Extended Call History tab to view the list of operations performed with the current call.

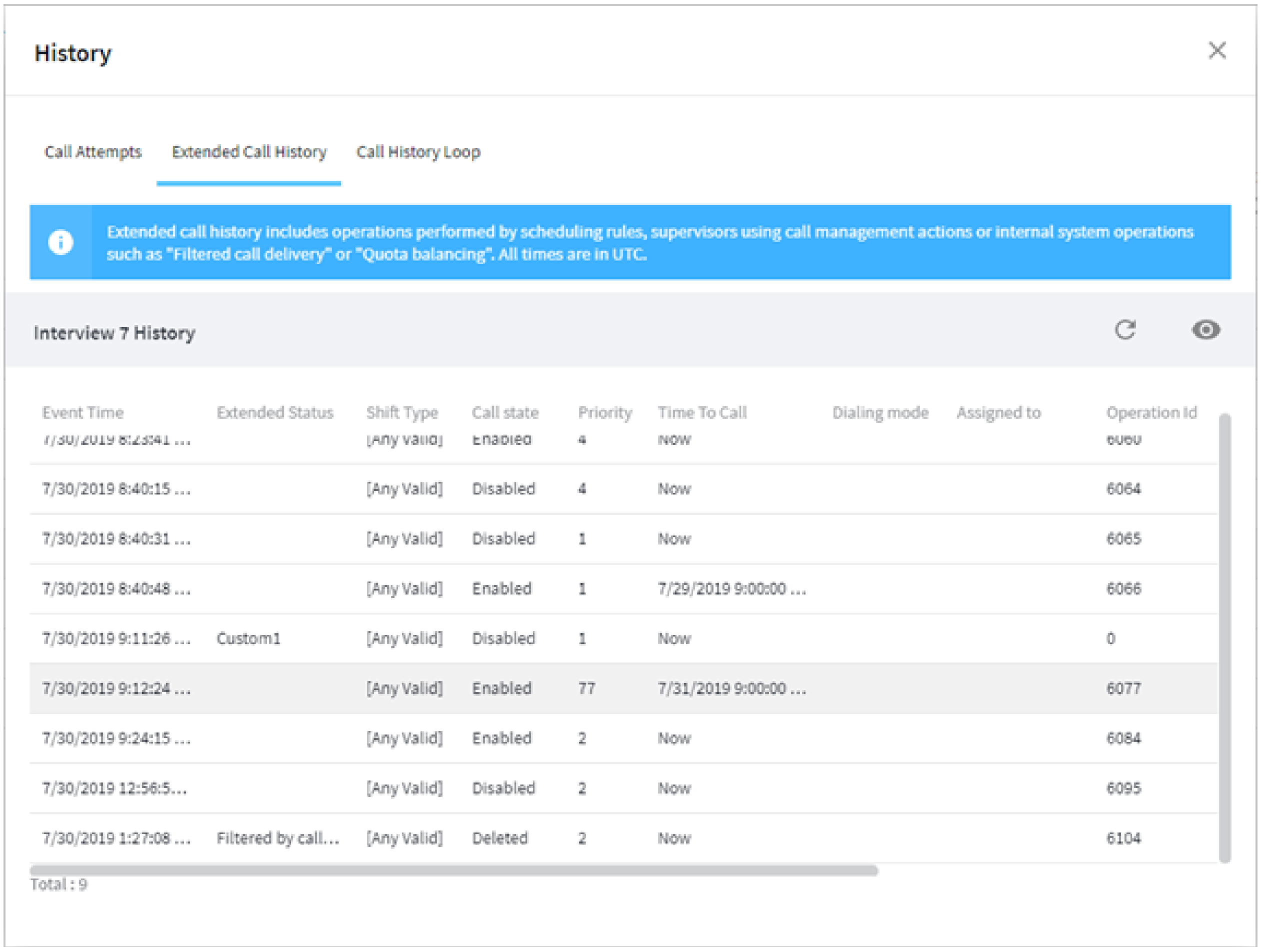


Figure 124 The History page with the Extended Call History tab displayed

The following data is displayed in the table:

- **Event Time** – this is the start time of the event.
- **Extended Status**– this is the Extended Status assigned to the interview/call upon finishing of the event. Not all operations change the extended status of a call. If such operation is listed, it is shown with the Extended Status column blank.
- **Shift Type** – this is the Shift Type specified for the interview/call upon finishing of the event.
- **Call State** – upon finishing of the event the interview can be assigned one of the three states: it can be in the "Deleted" state which means it is not scheduled anymore, it can be in the "Enabled" state which indicates that an enabled and scheduled call has been added to this interview, or it can be in the "Disabled" state which shows that the call was scheduled but it is disabled at the moment.
- **Priority** – the priority value assigned to a call upon finishing of the event.
- **Time to Call**– value of the Time to Call assigned to the interview/call upon finishing of the event.

Note that for interviews without calls (which are assigned the Completed, Terminated, Deleted and similar extended statuses upon finishing of the event) the value of the Time To Call displayed in the table is taken from the previous state.

- **Dialing mode**– indicates dialing mode specified for the call. This column appears blank for the calls that are dialed without the use of a dialer system, or shows the name of the appropriate dialing mode specified for the call (survey)

- **Assigned to** – current assignment specified for the interview/call upon finishing of the event.
- **Operation ID** – service operation ID
- **Operation** - operation name
- **Expiration Time** –expiration time specified for the interview/call upon finishing of the event.
- **Call Center** - call center specified for the interview/call upon finishing of the event.

You can view the technical details of some operations, for example the user ID of the supervisor who performed the operation. To view operation details:

1. select the required operation and click the **Operation Details** button in the toolbar above the table.

   The Activate Call page opens. This is similar to the page used to display details of the executed task (go to Viewing Tasks Performed by Supervisors on page 382 for more information).

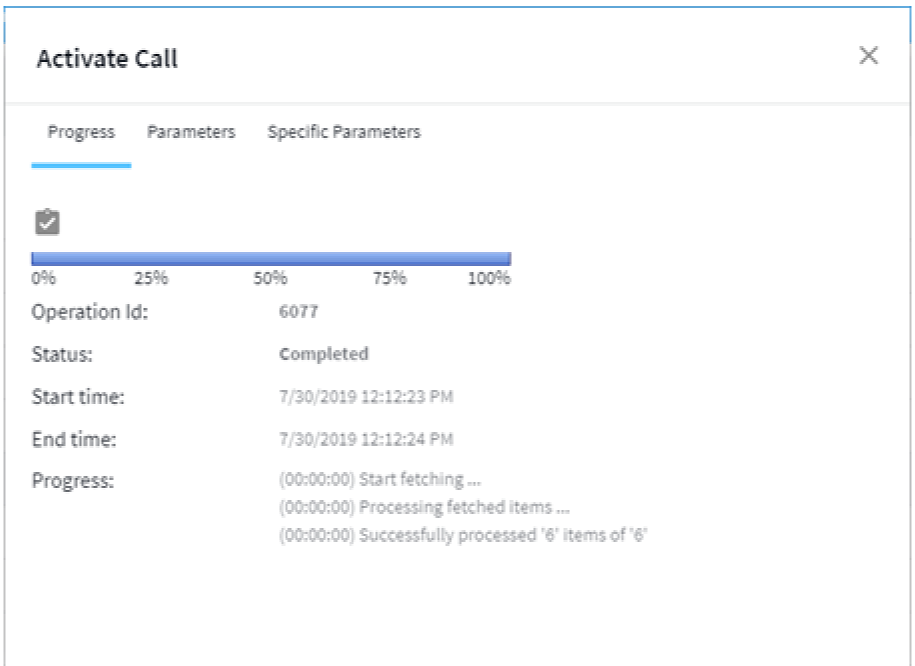


Figure 125 Operation details displayed in a page

The "Call History Loop" tab

The Call History Loop tab allows you to view captured data for interview questions which are contained in the "callhistoryinfo" loop. Note that the tab will only be available if the "callhistoryinfo" loop has been added to the survey. Refer to the separate Professional Authoring user guide for information on how to add loops to a survey.

A script is used to retrieve the captured data from the "callhistoryinfo" loop. This script must either be included by default in the template that contains the "callhistoryinfo" loop, or must be added to the survey manually by the survey author. To add or exclude questions, modify the loop or create a new "callhistoryinfo" loop, and to extract the data, modify the script accordingly.

The information extracted from the "callhistoryinfo" loop is presented in the grid as a list of the call attempts (one call attempt per row) that were made between the moment the call was activated and the moment the **Interview History** button was clicked.

To view additional call history info:

1. Open the Call Management window (go to Viewing the Interview/Call List on page 118 for more information).

2. Choose the required interview/call in the grid and click the **History** button in the Call Management window toolbar.

   The History page opens.

3. Go to the Call History Loop tab.

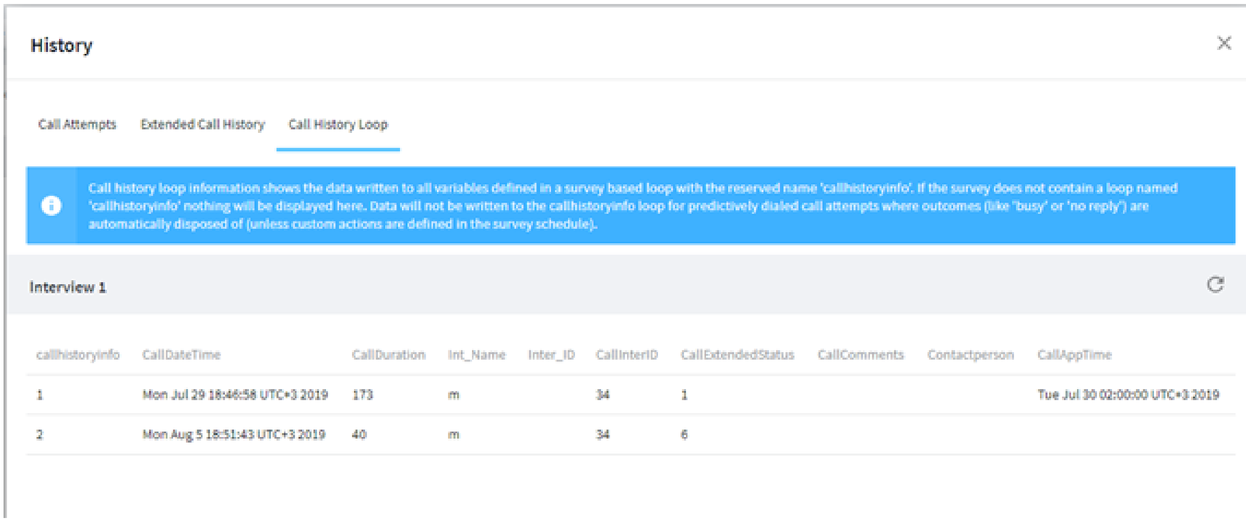


Figure 126 Viewing the call history loop info in the History page

Call attempts are presented as rows in the table.

The CallHistoryInfo data is not collected by default by the CATI system - it is in addition to the information presented on the Call Attempts tab. The Call history loop information shows the data written to all variables defined in a survey based loop with the reserved name 'callhistoryinfo'. The Call History Loop grid columns are configurable and correspond to the variables added to the Call History Loop in the survey. The survey designer may include any variable in this loop. All captured data is displayed as-is; it is not rendered in any way.

Data will not be written to the callhistoryinfo loop for predictively-dialed call attempts where outcomes such as 'busy' or 'no reply' are automatically disposed of, unless custom actions are defined in the survey schedule.

To update the captured data, click the **Refresh** button on the toolbar.

3.6.5. Viewing the Active Call List

When the number of simultaneously working interviewers is quite large, the interviewing tempo requires fresh interviews/calls to be delivered to the interviewers in a reliable, timely manner. The system automatically prepares and "identifies" interviews, and maintains a queue of the interviews that are most likely to be delivered next. Such "waiting" calls are considered as "active".

The supervisor can monitor the number of "Active" calls prepared by the system for delivery to interviewers. The active call list can only be displayed when there are interviewers logged into the system and these interviewers are assigned some calls. To view the number of active calls

1. Display the Call Management window (go to Viewing the Interview/Call List on page 118 for more information).
2. Click the **Active Calls** button in the Call Management window toolbar.

   The Active Calls window opens.

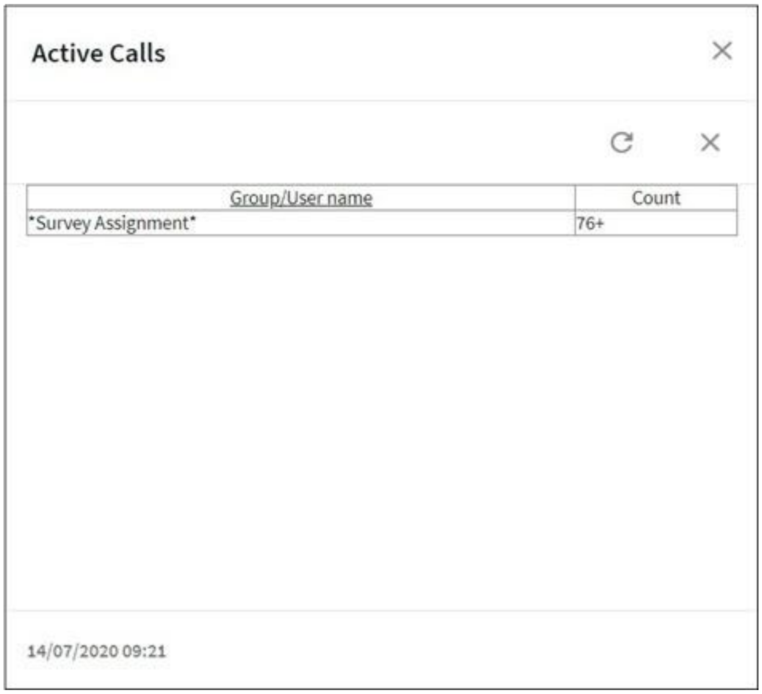


Figure 127 Example of the Active Calls window

The Active Calls window shown in the example above indicates that for the "Survey Assignment" group more than 76 interviews are ready and are waiting to be delivered.

Refresh the window to update the information.

3.6.6. Disabling and Enabling Calls

If you need to prevent a call from being delivered to an interviewer but want the call to retain its properties, you can ***disable*** the call. To return the disabled call to the regular working state, ***enable*** it.

The CATI Supervisor module allows you to disable and enable calls at any time. A call is disabled automatically when it has been filtered by FCD when a corresponding quota limit is reached or when another quota management rule is enacted.

A disabled call behaves in the same way as an enabled call; the properties of a disabled call are subject to any changes that are initiated either by the system or manually by a supervisor. The only difference is that a disabled call is never delivered to an interviewer.

Only scheduled calls can be disabled; calls that are currently in any other state cannot be disabled.

A disabled call remains visible when the "Scheduled" and "All" state is selected for viewing in the Call Management window, but it is hidden when other views are selected. A disabled call is highlighted either in red or yellow in the call list in the "Scheduled" view, but it is visible and is not indicated in any way in the "All" view.

The image below shows an example of the Scheduled view. Note the State column towards the right side of the list, which indicates the call state.

The system highlights in red calls that were disabled by the user, and in yellow calls that were disabled by quota management rules.

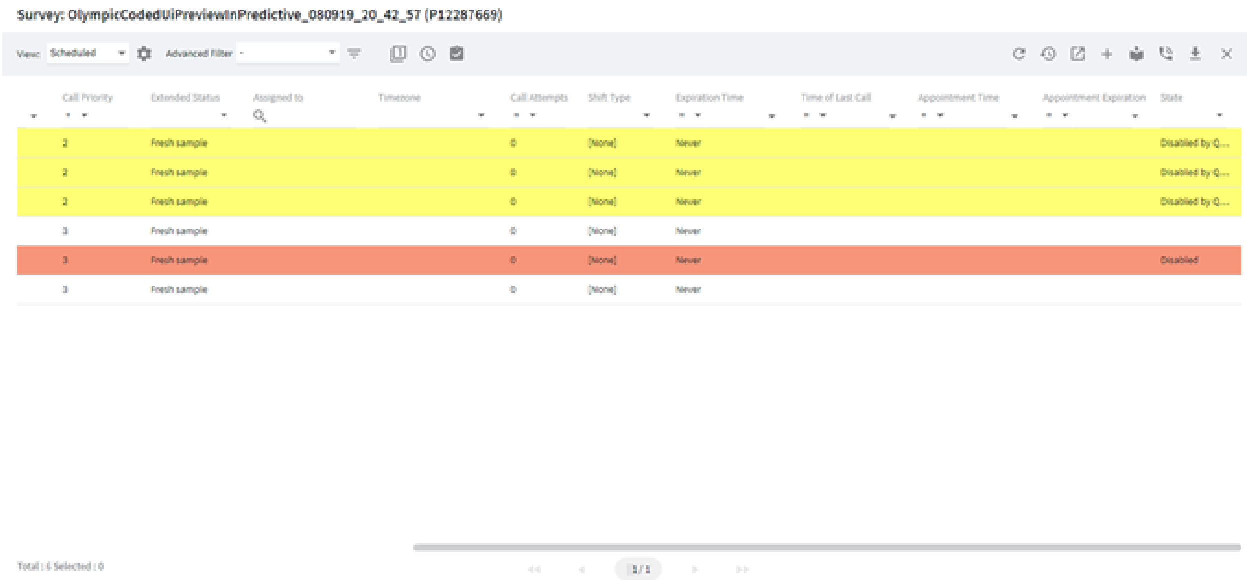


Figure 128 Example of the Call Management window showing disabled calls

When a scheduled call that is due for delivery is disabled, it remains in the "Scheduled" view. It does not appear in the "Active" view because it cannot be delivered.

Both "Enabled" and "Disabled" call properties can be set in a number of dialogs and views, and also via the context menu commands and through the scheduling script rules.

A call can be disabled:

- When an appropriate scheduling rule is applied to that call (go to Specifying Scheduling Script Rules on page 212 for more information).
- As a result of a Quota management operation, for example when a limit specified for a quota cell is reached and unused calls falling into this particular quota cell are filtered out or disabled so they cannot be used until the quota limit for that cell is changed.
- Via the context menu command in the Call Management window (go to Disabling a call from a call list in the Call Management window: on page 132 for more information).
- Via the context menu command from the Quota tab in the Survey Properties view (go to Viewing and Modifying Survey Quota Settings on page 76 for more information).

A disabled call can be enabled:

- When an appropriate scheduling rule is applied to that call (go to Specifying Scheduling Script Rules on page 212 for more information).
- Via the context menu command in the Call Management window (go to Enabling a call from a call list in the Call Management window: on page 133 for more information).
- Via the context menu command from the Quota tab in the Survey Properties view (go to Viewing and Modifying Survey Quota Settings on page 76 for more information).
- From the Activate Call dialog as part of the Activate Call operation (go to Activating an Interview/call on page 143 for more information).
- From the Edit Call dialog (go to Editing a Call on page 137 for more information).

Disabling a call from a call list in the Call Management window:

1. Display the Call Management window (go to Viewing the Interview/Call List on page 118 for more information).
2. Choose the Scheduled view to display calls.

3. Select the required calls in the call list, then right-click any selected call and choose **Disable** from the context menu.
4. In the sub-menu that appears, select the desired action (Selected Only, or Entire List).

   The operation progress dialog opens, with the details depending on the action that was selected.

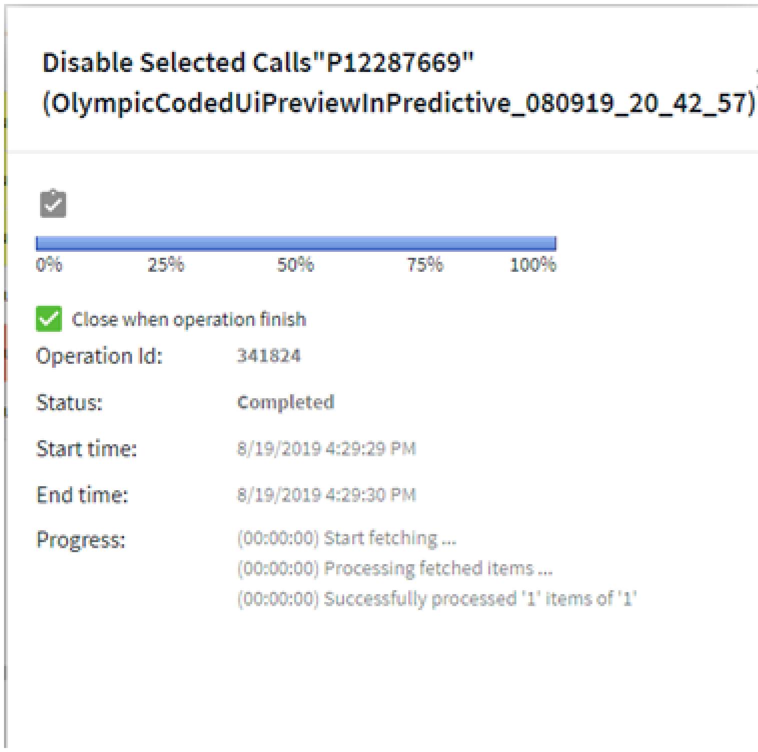


Figure 129 Example of the Disabling selected calls progress dialog

The outcome of the Disable operation is indicated in the Progress field. In the event of a partial or unsuccessful operation, see here (go to Activating an Interview/call on page 143 for more information).

Enabling a call from a call list in the Call Management window:

1. Display the Call Management window (go to Viewing the Interview/Call List on page 118 for more information).
2. Choose the Scheduled view to display calls.
3. In the call list select the disabled calls you wish to enable, then right-click any selected call and choose **Enable** from the context menu.
4. In the sub menu that appears choose the desired action: Selected Only or Entire List.

   The operation progress dialog opens, with the details depending on the action that was selected.

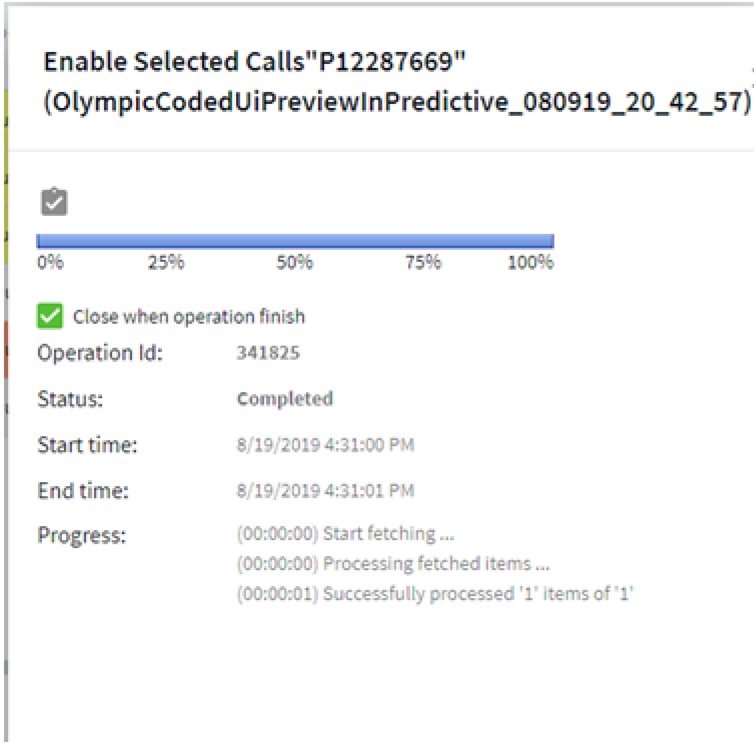


Figure 130 Example of the Enabling selected calls progress dialog

The dialog shows the action summary and progress details (go to Activating an Interview/call on page 143 for more information).

3.6.7. Working with Filters in the Call Management dialog

While working in the Call Management dialog the supervisor is allowed to set filters to display interviews meeting certain criteria described using expressions.

The list of available filters includes both site and survey specific filters.

The supervisor can apply existing filters, create new filters, or delete the existing ones (go to Creating and Modifying Advanced Filters on page 105 for more information).

3.6.7.1. Applying a Filter in the Call Management dialog

To apply an existing filter:

1. Choose the required filter using the Filters drop-down box.

   As soon as the filter is selected, the grid containing the interview list is refreshed and all interviews/calls not matching the applied filter condition are hidden.

2. To reset the filtering condition, choose the “No Filter” option in the Filter drop-down box (the “–” sign).

3.6.8. Displaying Extra Question Columns in the Interview/call List

You can display extra columns in the interview/call list. These columns will show the survey questions for each interview/call in the list. This can be useful when you need to filter interviews/calls according to survey question (variable) values.

Note that this applies only for questions that are marked as "Available as CATI filter". Questions can be marked as "Available as CATI filter" in Forsta Authoring, refer to the separate Professional Authoring user guide for details.

Added columns remain available in the Call Management dialog even if the dialog is closed and reopened again. However the columns will be available only until the current CATI Supervisor session is ended.

Variable columns are added using the Add Question page. To display question columns in the interview/call list:

1. Click the **Add Question** button on the toolbar.

   The Add Question page opens.

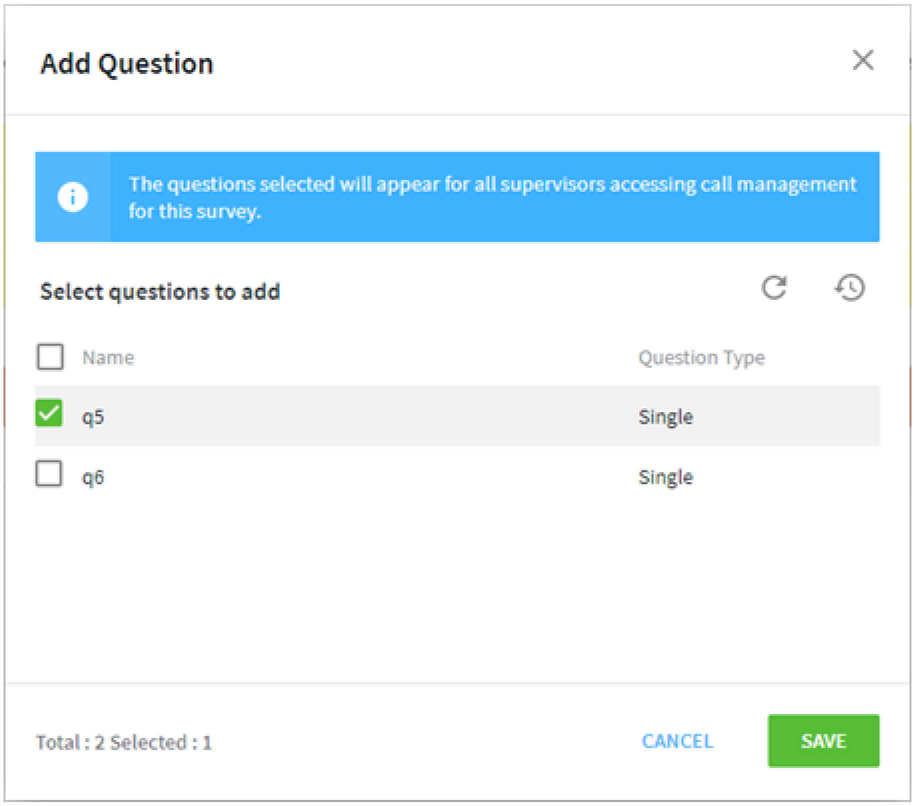


Figure 131 Adding a variable column with the help of the Add Question page

   This page lists the questions that are used in the current survey and are marked as "Available as CATI filter". Grid columns display the survey question name and type. Survey questions can be treated as variables.

   Select the required questions (variables) by checking the appropriate box.

   Click the **Clear Selection** button above the grid to deselect all the selected questions at once.

   Click the **Refresh** button above the grid to display the most recent question list.

2. On completion click **Save**.

   The Select Questions page closes and the interview/call list in the Call Management window is refreshed and the selected columns are added to the interview/call list.

Added columns will remain available until the current session is closed.

3.6.9. Modifying the Interview/Call Properties

You can modify a number of interview/call properties as required. These properties include:

- Extended Status

- Scheduled time
- Call priority
- Shift type
- Interview assignments

All of these properties are edited via dedicated dialogs which are displayed when you choose the appropriate command from the context menu. You can execute context menu commands for a single interview/call, or for a number of interviews/calls selected in the list.

Note that the set of commands available for a particular interview/call at any time will depend on the current state of that interview/call. Any commands that are not available at the time are greyed out in the context menu.

Interviews/calls can be filtered by state using the State drop-down list located above the grid. When a particular state is chosen, the grid refreshes and displays only interviews/calls in the selected state.

Some of the actions performed by executing context menu commands, such as Interview Assignments or Shift type change, are also available in other dialogs.

3.6.9.1. Adding a Call

This command is used to add a new call or modify the properties of an existing call for any existing interview.

Although this command is chosen from the context menu, it is not performed for the currently selected interview but for any interview with the specified ID. If you specify a non-existent interview ID a warning message will be presented.

To add a new call (or modify properties of any existing call):

This command can be performed for interviews in any state - Scheduled, Not Scheduled, or Active.

1. Right-click anywhere in the grid in the Interview/Call list in the Call Management window, and choose **Add** from the context menu that appears, or click the **Add New** button on the toolbar.

   The Add Call dialog opens.

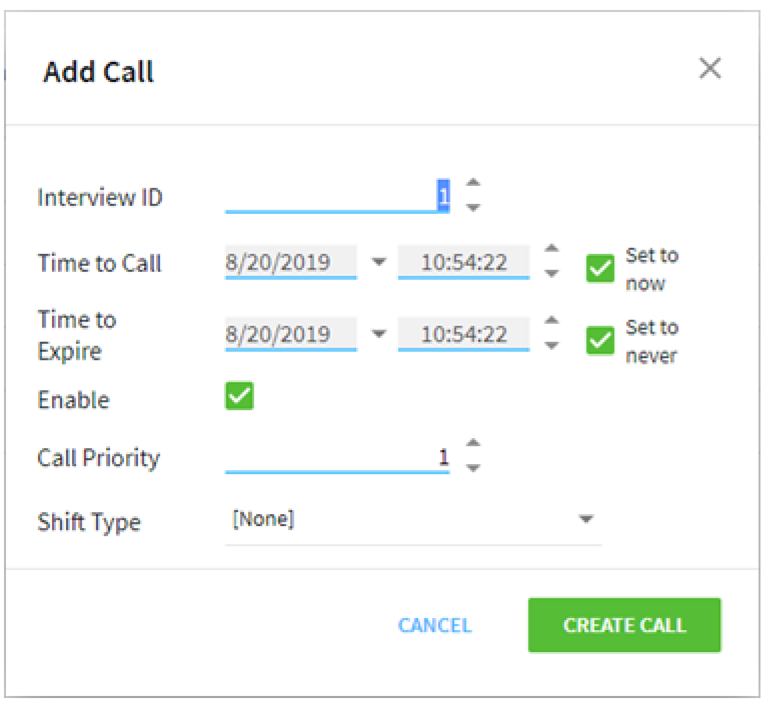


Figure 132 Adding/modifying the call properties

Here you can configure all call properties, however you cannot assign the call to an interviewer/group.

2. Specify the Interview ID.

   Note that only a single call per interview can exist. If a call does not currently exist for the selected interview then one will be created, if this interview already has a call then its properties will be updated. If you specify a non-existent interview ID, a warning message will be presented.

3. You can specify whether the call would be created/updated as with a "disabled", or "enabled" call. To create/update a call as "enabled", check the Enable box. This is the default setting. To create/update a call as "disabled" call clear the Enable box (go to Disabling and Enabling Calls on page 131 for more information).

4. Configure other call properties as required (go to Editing a Call on page 137 for more information).

5. On completion click **Create Call** to create a new call or change the existing call properties.

   The created/edited call is assigned the Scheduled state.

3.6.9.2. Editing a Call

Using the Call Management dialog you can edit properties of any scheduled call. This operation allows modifying all properties of a scheduled call with the help of a single dialog.

This operation can only be performed for a Scheduled or an Active call, so the **Edit** command will only be available while the Call Management window displays the Scheduled or Active call list.

The Edit command allows you to modify a set of the call properties, such as "Call Priority", "Shift Type", "Time to Call" or "Time to Expire", and also allows you to enable the disabled calls from a single dialog. In addition you can modify separate call properties using the appropriate context menu commands.

To edit scheduled calls:

1. Open the survey containing the required call(s) in the Call Management window (go to Viewing the Interview/Call List on page 118 for more information).

2. On the toolbar, choose the Scheduled, or Active interview/call state in the State drop-down list.

3. Right-click the required call in the list and choose **Edit** from the context menu.

   The Edit call dialog opens.

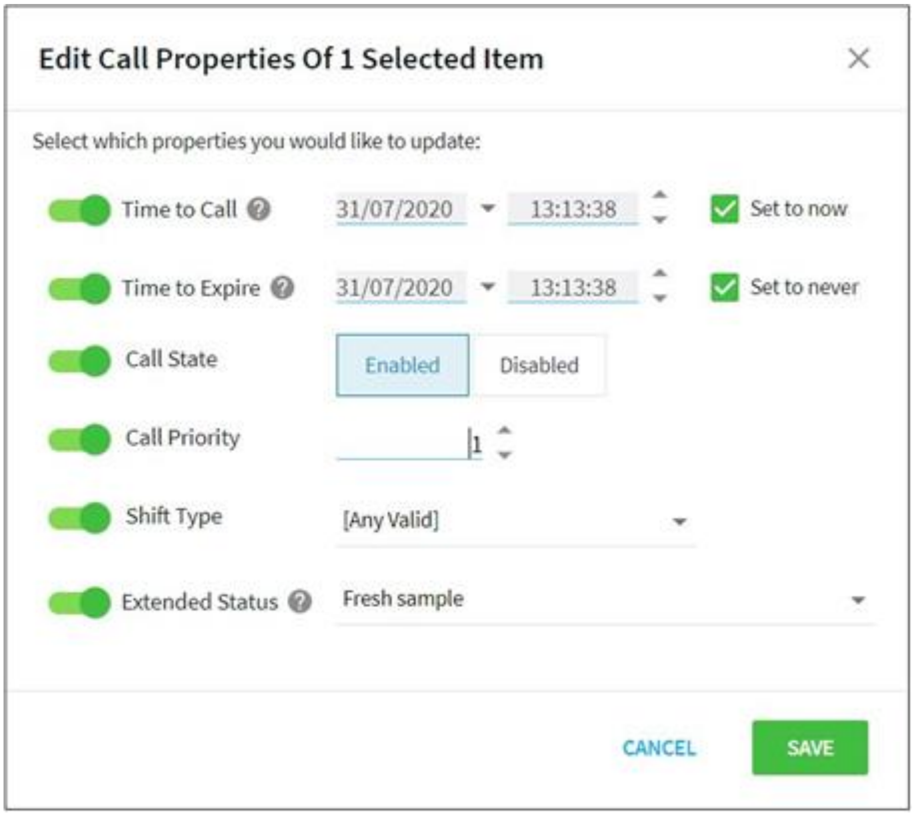


Figure 133 Editing call properties using the Edit dialog

Note that the appearance of the Edit dialog when only one call is to be edited differs slightly to when multiple calls are selected for editing. When only one call is to be edited, all of the current properties of the call are displayed in the dialog and all of the toggle switches to enable a property to be changed are enabled by default. When multiple calls are to be edited, the default position of the switch is disabled for all properties. This is so that when editing call properties for multiple calls, changes will only be applied to the specific properties that need to be updated.

Here you can modify the following call properties:

- o**Time to Call -** indicates the start (date and time) of the period when the call should be delivered to the interviewer. Set this using the calendar (opened by pressing the arrow button in the Date field) and the Time spinbox (to the right of the Date field). The Set to Now checkbox allows you to override the date and time values and specify the call delivery time as the moment the **Save** button is pressed.
- o**Time to Expire -** indicates the end (particular date and time) of the period when the call should be delivered to the interviewer. Set this using the calendar (opened by pressing the arrow button in the Date field) and the Time spinbox (to the right of the Date field). The Set to Never checkbox allows you to override the date and time values and specify that the call should never be excluded from the delivery queue.
- o**Call State -** check to enable a disabled call (go to Disabling and Enabling Calls on page 131 for more information). Note that a disabled call must be enabled before it can be delivered to the interviewer.
- o**Call Priority -** change this using the spinbox; click the Up or Down arrows to increase or decrease the value by one, or type the desired value into the field.
- o**Shift Type -** choose a value from those specified for the current survey.
- oExtended Status -
- o**Dial Mode -** this is only available for systems with an integrated dialer.

4. Click **Save** to confirm any call property changes.

The Edit call dialog closes and the interview/call list in the Call Management dialog is refreshed.

3.6.9.3. Deleting a Call

Using the Call Management dialog you can delete any scheduled call that is currently in the list of the Scheduled calls. The action of deleting a call will remove it from the Scheduled list and place it into the Not Scheduled list. The interview record and corresponding data will not be physically deleted.

This operation can be performed only when the Call Management window displays the Scheduled call list.

To delete a call:

1. Open the survey containing the required call in the Call Management window (go to Viewing the Interview/Call List on page 118 for more information).
2. On the toolbar go to the State drop-down list and choose the **Scheduled** state.
3. Select the required call (or a number of calls) in the list.
4. Right-click the selected call (or any call in the selected group), and choose **Delete selected only** from the shortcut menu.

   Alternatively you can choose **Delete Entire List** - this will delete all the scheduled calls.

   A confirmation message is displayed.
5. Click **OK** to delete the selected calls.

3.6.9.4. Moving a Call

You can modify the Extended Status of an interview, for example if you plan to repeat the interview. This is called moving a call. You can manually assign an Extended Status to the selected interview, or to a number of interviews, and they will be “moved” into this status. This operation can be performed for an interview/call in any state.

To move an interview/call:

1. Select the required interview (or a number of interviews).
2. Right-click the selected interview and choose **Move Selected Only** from the shortcut menu.

   Alternatively you can choose **Move Entire List** from the shortcut menu.

   The Move… dialog opens.

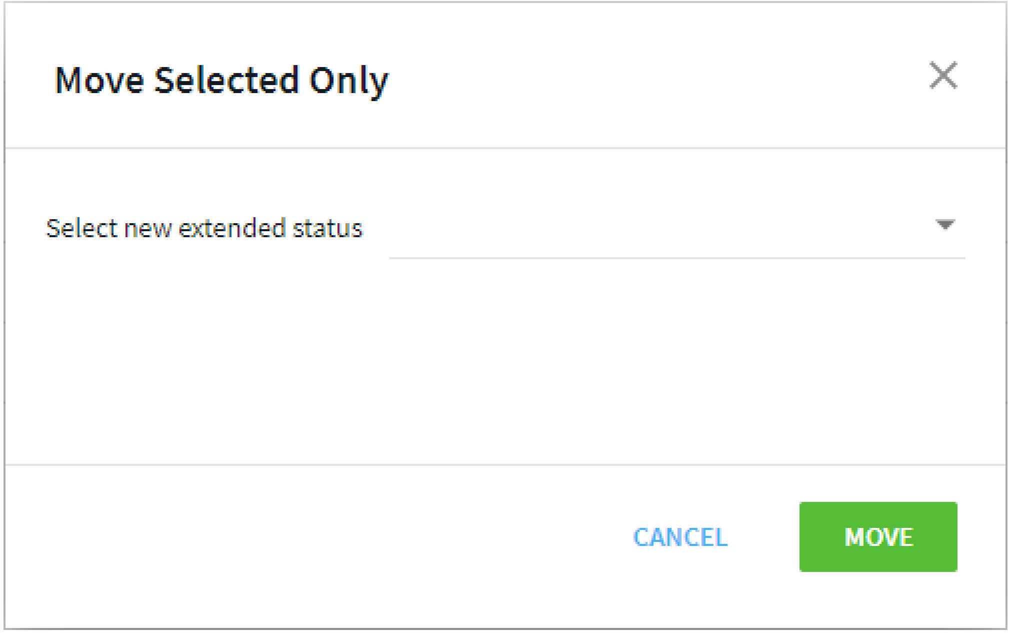


Figure 134 Move Selected Interviews Only dialog

3. Select a new Extended Status from the Extended Status drop-down list (go to Appendix F - List of Predefined Extended Statuses on page 468 for more information).
4. Click **Move** to confirm the change.

   The operation progress dialog opens.

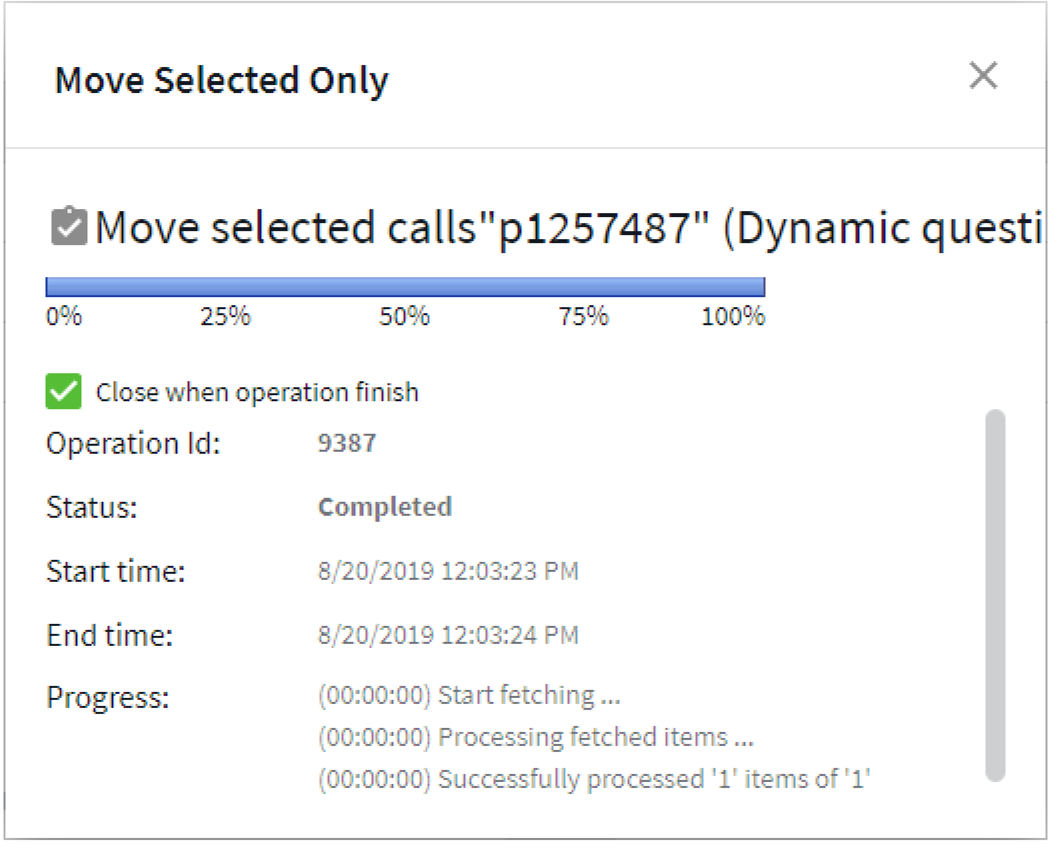


Figure 135 Move operation monitor window - operation completed successfully

The following information is displayed in the dialog.

oProgress bar - displays the percent of the processed records.

o**ID** - the Move operation ID.

o**Status** - this field shows current operation status: **"Not started"** means the operation has not commenced yet, **"In progress"** means the operation is in progress at the moment, **"Partially completed"** means all records were processed but some were not moved, **"Complete"** means all records were successfully moved, **"Failed"** means no records were moved.

o**Start time** - operation start time and date (uses the local timezone settings).

o**End time** - operation finish time and date (uses the local timezone settings).

o**Progress** - displays dynamic content describing the current operation state, and any errors if any occur in the course of the operation.

An operation may not finish successfully. The Progress field always shows a short verbal operation summary on completion. The following unsuccessful outcomes are possible:

oPartially completed operation;

oFailed operation (an error has occurred).

Note that the Move operation is assigned the "Failed" status only when ALL selected records could not be moved to the specified extended status.

In the event a "Partially completed" or "Failed" status is given, retry the operation. If the error persists, contact the support team to find a solution.

By default the "Close when operation finishes" box is checked. Clear this box if you want to keep this window displayed. Messages displayed in the Progress field can then help you analyze the operation outcome.

If you have cleared the Close when operation finishes box, when you wish to close the window click the **Close** button. When the Move operation is complete, the interview list in the Call Management dialog refreshes and the selected interviews/calls are moved to the specified statuses.

3.6.9.5. Moving and Rescheduling an Interview

You can modify the Extended Status of any interview and simultaneously run the scheduling script associated with the current survey. Note that this operation does not necessarily schedule the interview immediately – it only runs the appropriate scheduling script.

If you attempt to execute this command for a call that is currently delivered to an interviewer and is in progress, it will be ignored.

This operation can be performed for an interview/call in any state, but the command becomes available only when the grid list in the Call Management dialog displays interviews/calls in all states (when the “All” option is selected in the State drop-down list on the toolbar).

To move and reschedule an interview:

1. Select the required interview/call (or a number of interviews/calls).
2. Right-click the selected interview and choose **Move And Reschedule Selected Only** or **Move And Reschedule Entire List** from the shortcut menu.

   The Move… dialog opens.

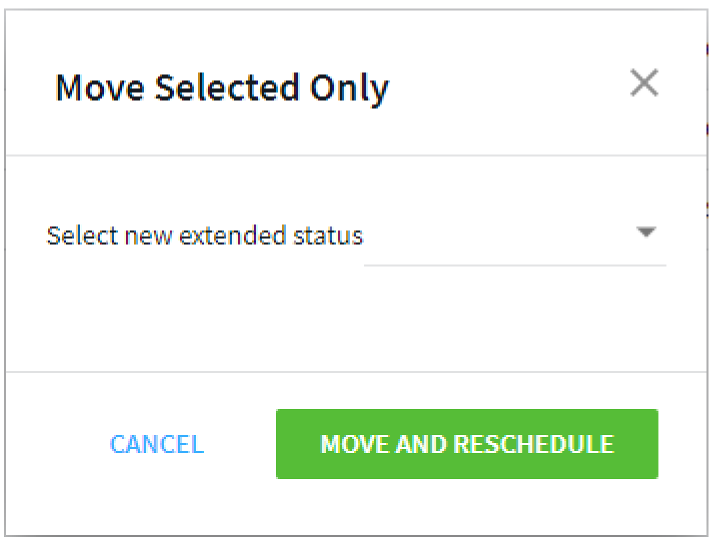


Figure 136 The Move and Reschedule page

3. Select a new Extended Status from the Extended Status drop-down list (go to Appendix F - List of Predefined Extended Statuses on page 468 for more information).
4. Click **Move** to confirm the change.

   This window closes, the Extended Status is modified, and the appropriate scheduling script will be run. The interview list in the Call Management dialog is refreshed. Newly assigned Extended Statuses will be displayed in the list in the Extended Status column.

Note: The "Move and Reschedule" action can be run for a maximum of 1000 interviews/calls at one time. In the event more than 1000 are selected, the properties of the excess interviews/calls will not change and a message informing you of this is presented. Re-run the action to change the remainder.

3.6.9.6. Activating an Interview/call

You can modify an interview's scheduling parameters, but before you can do this you must first “activate” the interview/call. You can then schedule the call, assign a person/group to the call and modify a number of other parameters in one step. You can activate a single interview/call or a number of interview/calls simultaneously.

A special assignment type allows you to activate interview/calls while assigning these calls only to people who belong to specified groups. This type of assignment is called a "Multiple Group Assignment" (go to Multiple Group Assignments on page 147 for more information).

Note: When an interview is activated, all the specified parameters COMPLETELY REPLACE the old parameters that existed before this activation was executed.

Interviews can be activated for a single person, for a single group, or for a selection of groups.

To activate an interview:

1. Select the required interview (or a number of interviews) in the list in the Call Management window.
2. Right-click the selected interview/call (or any interview/call in the selection), and choose **Activate Selected Only**or **Activate the Entire List**from the shortcut menu.

   The confirmation dialog is displayed.
3. Click **Yes** to confirm the action.

   The appropriate **Activate** page opens.

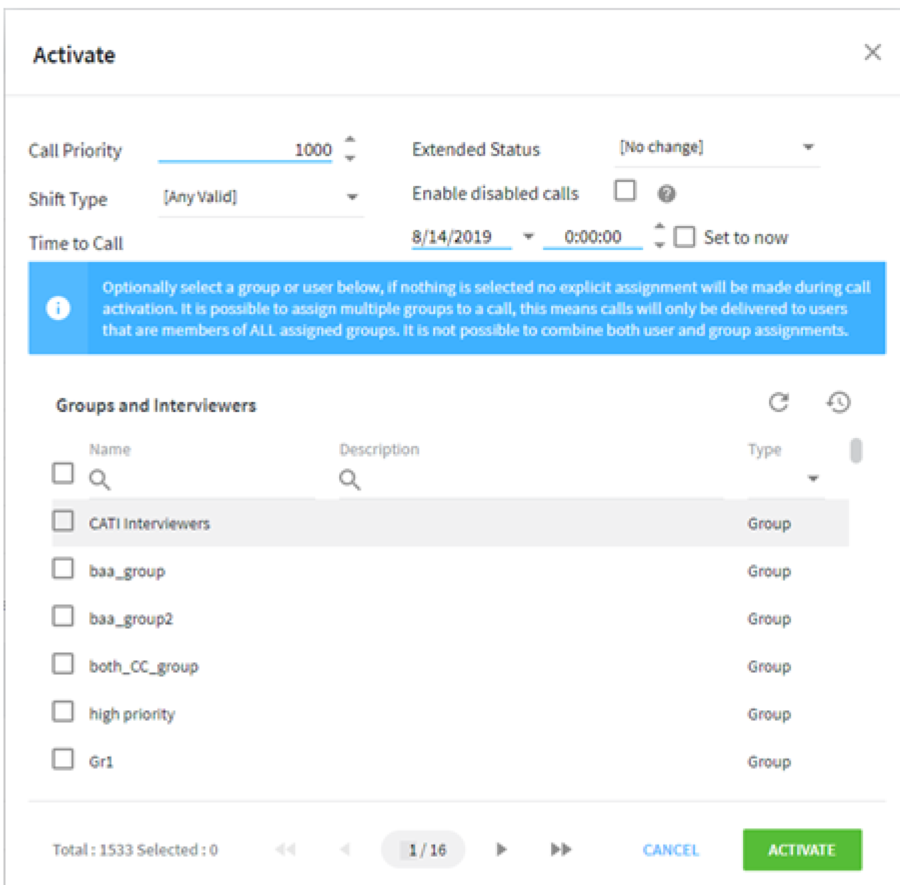


Figure 137 Activate dialog

Using this dialog you can modify the following interview/call properties:

- oCall priority
- oShift type
- oExtended status
- oTime to call
- oInterviewer / interviewer group assigned to this call
- oEnable the disabled calls as part of the activation process if the selected interviews include some that are disabled.

4. Modify the priority of a call using the **Call Priority** spinbox or type the value directly in the field.
5. Modify the Shift Type using the **Shift Type** drop-down list. Choose a value from those specified for the current survey. The default is "Any valid".
6. You can change the Extended Status to any of those available in the Extended Status Code Group currently specified for use with the survey (use the Extended Statuses parameter on the **Survey View > General** tab).
7. Time to Call indicates the starting moment (date and time) of the period when the call is to be delivered to the interviewer.

   The Set to Now checkbox overrides the date and time values and starts the call delivery procedure the moment the **Activate** button is pressed.
8. If one or more calls you are activating is disabled, you may need to enable them. To do this check the **Enable disabled calls** box. Any disabled calls that are to be activated as part of the activation process will then be enabled. By default this box is cleared.(go to Disabling and Enabling Calls on page 131 for more information)

Note that both enabled and disabled calls can be activated, but disabled calls are not delivered to the interviewer until they are enabled.

The last field contains the list of interviewers/interviewer groups in the form of a hierarchical tree. This is an optional parameter. You can select any combination of interviewers/interviewer groups in this tree. Use the **Shift** key to create a multiple selection.

You may leave the activated call unassigned (when you make no selection in the interviewer / interviewer group list). In this case the call will be delivered to the first available interviewer from those assigned to this survey when the specified time is due. If there are no interviewers currently assigned to this survey, this call will be delivered as soon as one appears.

Note that if the quota controlled call delivery is turned on in Forsta Professional Authoring then an extra interview/call property check is performed as part of an activation procedure.

If a quota is defined and enabled for the survey in Professional Authoring (the "CATI delivery when quota not full" option is enabled in quota settings for this survey), the call activation procedure performs the following check for each call to be activated:

- oFor calls that fall into each defined quota cell, the activation procedure checks if that quota cell is already full. If the quota cell is not full yet, the call is activated. If it is full the call is not activated, but its extended status remains unchanged. Be aware that in this case this call will remain in the "Not scheduled" list.

Note that calls that were "not activated" due to the above reason, are still regarded as "successfully activated" calls, and they are included in the total count of successfully activated calls in the Activate... progress dialog (see below).

9. Click **Activate** to confirm the interview/call property changes.

   The Activate… progress dialog opens. If any selections are made that are not supported, the CATI Supervisor system will display a warning message and stop the Activation process. No further interviews will then be activated. For example, if you attempt to activate an interview for a combination of groups and persons, the following warning message is displayed.

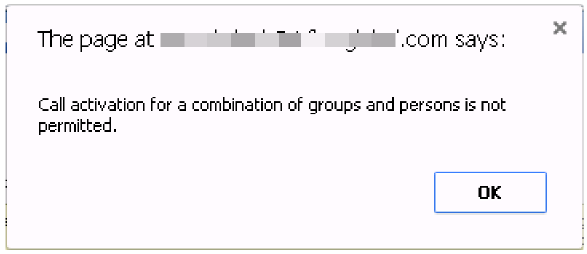


Figure 138 Warning message displayed when a wrong selection is made

Click **OK** to close the message, then to restart the process create a valid selection and repeat the Activate... action.

Monitoring the operation outcome

This and a number of similar operations can involve processing a large number of records, and any errors will prevent the operation from being completed. The CATI Supervisor system provides a monitor window that shows the main details of the operation and indicates the outcome.

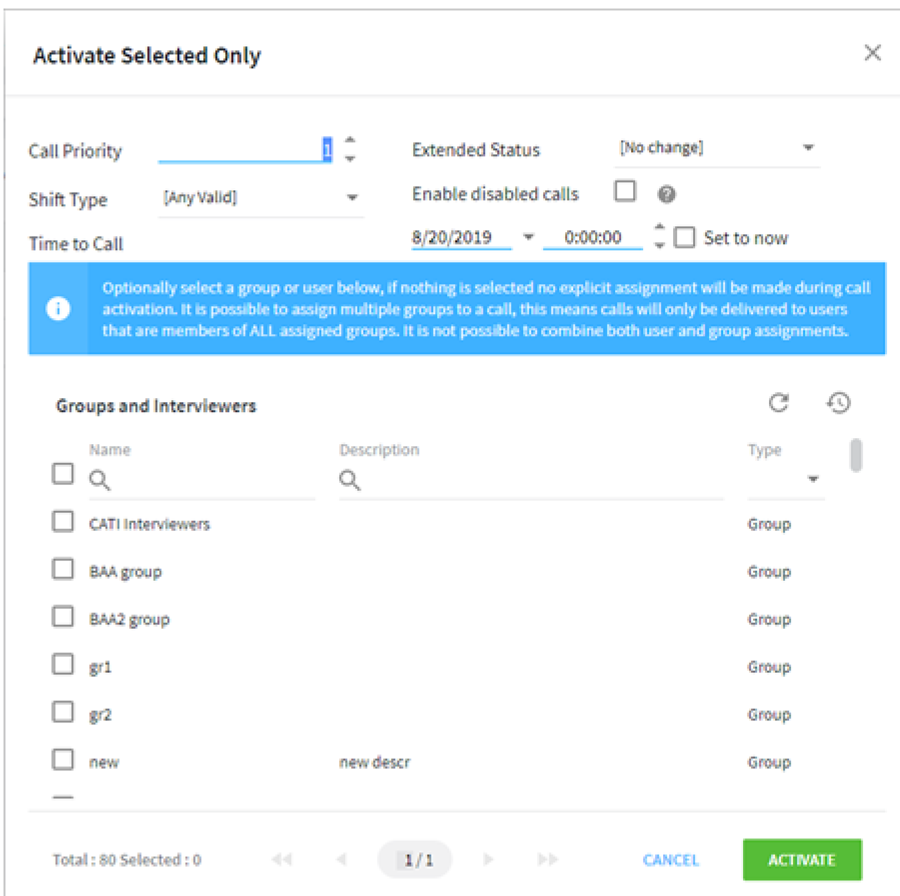


Figure 139 Example of the activate operation monitor window - operation completed successfully

The following information is displayed in the monitor dialog.

oProgress bar - displays the percentage of the processed records.

o**ID** - the Activate operation ID.

o**Status** - shows the current operation status: **Not started** means the operation has not commenced yet, **In progress** means the operation is in progress, **Partially completed** means all records were processed but some failed to be activated, **Complete** means all records were successfully activated, **Failed** means no records were activated.

o**Start time** - operation start time and date (uses the local timezone settings).

o**End time** - operation finish time and date (uses the local timezone settings).

o**Progress** - shows the current operation state. Various messages indicate the number of currently processed records, summarize the operation outcome and list any errors that may have occurred.

The picture below shows an example of the monitor window displaying information regarding the operation in progress.

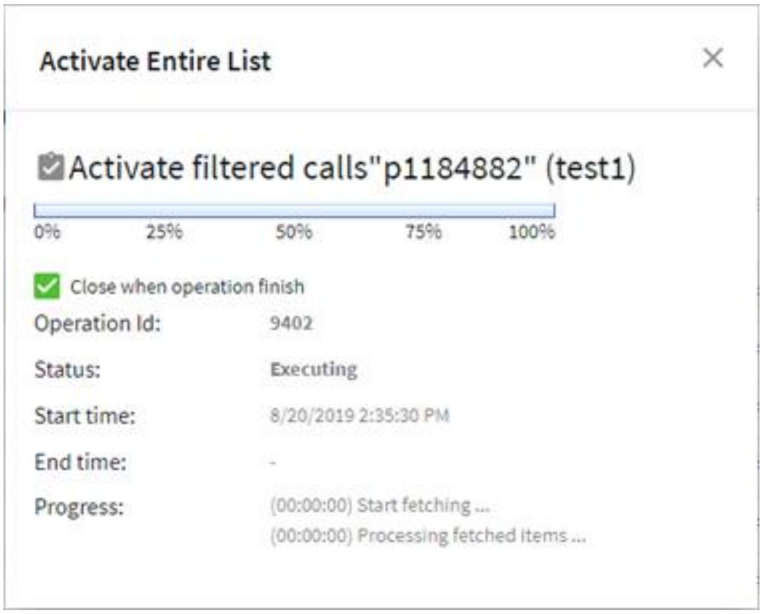


Figure 140 Activate operation monitor window - operation in progress

The Progress field shows a short summary on completion. An operation may not finish successfully; the following unsuccessful outcomes are possible:

oPartially completed operation.

oFailed operation (an error has occurred).

Note that the Activate operation is assigned the "Failed" status only when ALL selected records could not be activated.

If an error message is presented you should first re-check the operation parameters. For example, the Activate operation may fail if the specified time is outside the selected shift type. Correct any errors found then retry the operation. If the error persists, contact the support team.

By default the **Close when operation finishes** box is checked and the window closes automatically when the operation is finished. Clear this box if you want to keep this window open - note that messages displayed in the Progress field could help you to discover the reasons behind an operation failure.

If the **Close when operation finishes** box is deselected, click the **X** button to close the monitor window. Otherwise the window closes automatically after a short delay. When the Activate operation is finished, the interview list in the Call Management dialog is refreshed and the selected interviews/calls are activated.

3.6.9.7. Multiple Group Assignments

You can assign calls only to persons who are included in a number of specified groups. For example, a person who is a member of both Expert and English groups will receive calls that have the assignment: Expert Group AND English Group.

Note: Multiple Group Assignment (when two or more groups are specified in the assignment) does not mean that the call is assigned to these groups of interviewers. With Multiple Group Assignment, only persons belonging to all the groups in the assignment will receive calls with this Multiple Group Assignment. I.e. If a call is assigned to Group1 and Group2 then persons who belong only to Group1 or Group2 will not receive this call. Only persons who belong to both Group1 and Group2, and not to any other group in addition to these two, will receive these calls.

A call can be assigned to multiple groups using the following procedures:

- Call activation (go to Activating an Interview/call on page 143 for more information).
- Call assignment (go to Assigning a Person/Group to a Call on page 149 for more information)
- By specifying the assignment in the loaded sample (refer to the separate Professional Authoring user guide for details of the sample file format used for loading sample data into the Authoring module).
- By applying appropriate scheduling script actions - "Assign user/group(s)", "Add a group to a multiple assignment", "Remove a group from a multiple assignment" (go to Specifying Scheduling Script Rules on page 212 for more information). The actions are listed in appendix A (go to Appendix A - Action Parameter Descriptions on page 458 for more information).

Multiple Group Assignment can be performed with any dialing mode.

If a call has a Multiple Group Assignment, the names of these groups will appear in the "Assigned To" column in the Call Management window (see the picture below). These names are shown as comma separated.

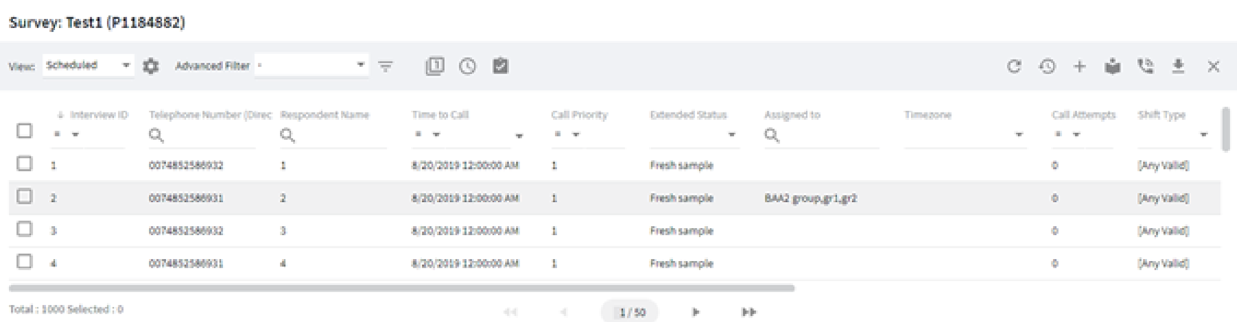


Figure 141 Interview with ID 2 has a Multiple Group Assignment

Important!
Before creating group assignments by uploading a sample file to the Authoring server, check that the sample file contains a column with the group IDs. This must be a comma-separated list for each call you want to assign to multiple groups. Note that if just one group ID specified in the sample is incorrect, the entire multiple assignment operation is canceled. Refer to the Authoring manual for details concerning the sample file format and upload procedure.

Note that if a group which was used in a Multiple Group Assignment specification is deleted, this Multiple Group Assignment is deleted automatically. The CATI Supervisor module then displays a message to inform users that the related Multiple Group Assignment was also deleted.

3.6.9.8. Changing a Call Priority

You can change the priority of any call. This command can be executed only for the scheduled calls.

1. Choose **Scheduled** in the State drop-down list to display only scheduled calls in the Call Management list.

2. Select the required call (or a group of calls) in the list by checking the required items (click the required items while holding down **Ctrl** or **Shift** keys on your keyboard to create a multiple selection).

3. Right-click the selected call (or any call in the selected group), and choose **Change Priority to Selected only** from the shortcut menu.

   Alternatively you can choose **Change Priority to Entire List** from the shortcut menu. This will execute the command for the whole call list. The appropriate Change Priority… page opens.

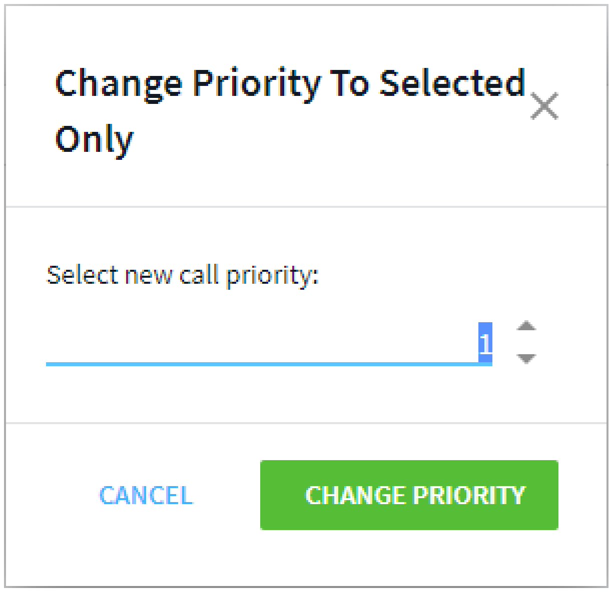


Figure 142 Changing Priority of a call

4. Select a new value using the Call Priority spinbox.

5. Click **Change Priority** to confirm the change.

   The window closes and the call priority is modified. The interview list in the Call Management window is refreshed.

3.6.9.9. Changing the Shift Type for a Call

You can change the shift type already assigned for a call. This command can be executed only for the scheduled calls.

1. Choose **Scheduled** in the State drop-down list to display only scheduled calls in the Call Management list.

2. Select the required call (or a group of calls) in the list by checking the required items (click the required items while holding down the **Ctrl** or **Shift** keys on your keyboard to create a multiple selection).

3. Right-click the selected call (or any call in the selected group), and choose **Change Shift Type to Selected Only** from the shortcut menu. Alternatively you can choose **Change Shift Type to Entire List** to execute the command for the whole call list.

   The appropriate Change Shift Type… dialog opens.

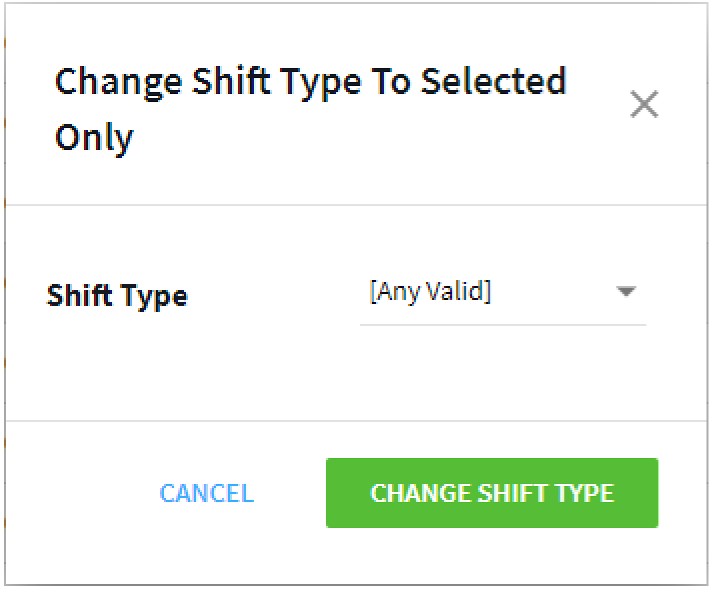


Figure 143 Change Shift Type dialog

4. Select a new value from the Shift Type drop-down list.
5. Click **OK** to confirm the change.

   The window closes and the shift type is modified. The interview/call list in the Call Management dialog is refreshed.

3.6.9.10. Assigning a Person/Group to a Call

You can assign an interviewer/group to a call, and you can change an existing assignment. Note that this command can be executed only for Scheduled or High Priority calls. You can create an assignment to a single call or to a number of calls simultaneously.

You can also assign calls only to people who belong to specified groups. This type of assignment is called a "Multiple Group Assignment" (go to Multiple Group Assignments on page 147 for more information).

Note: A new assignment replaces an existing assignment. If an assignment has already been made for a call it will be COMPLETELY REPLACED if a new assignment is made for that call.

The following assignment types are possible:

- For a single person.
- For a single group.
- For a selection of groups.

To assign a person/group to a call:

1. When in the Call Management window, go to the State drop-down list and choose the Scheduled or High Priority state.

   Only calls in the corresponding state are displayed.
2. Select the required call (or a number of calls).
3. Right-click the selected call (or any call in the selected group), and choose **Assign to Selected Only** or **Assign to Entire List** from the shortcut menu as appropriate.

   The appropriate Assign to… dialog opens with a list of the groups and interviewers.

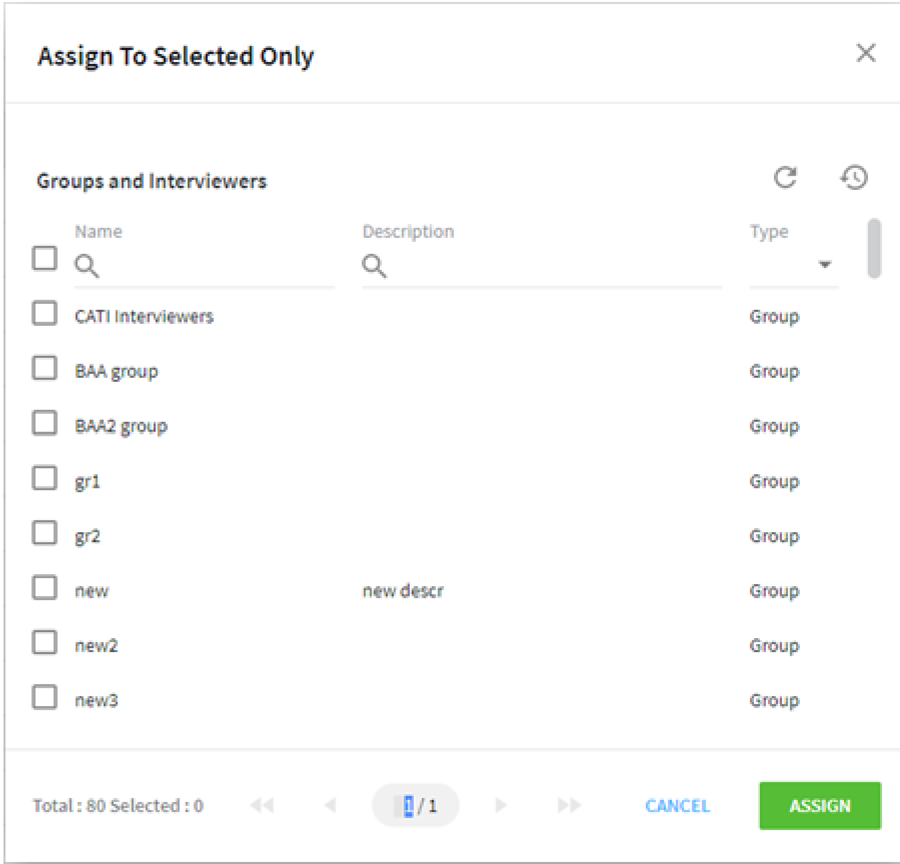


Figure 144 Assign to a Call dialog

4. Check the boxes to select the required interviewer/interviewer group from the list.
5. Click **Assign** to confirm the change.

   The window closes and the assignment is modified. The interview/call list in the Call Management dialog will be refreshed, and a new assignment will be displayed in the Assigned to column.

   The CATI Supervisor will cancel the assignment operation and no assignment will be made for any type of selection which is not supported, and will display the appropriate warning message. For example, if you attempt to assign a call to a number of persons or to a combination of persons and groups, the following warning messages are displayed.

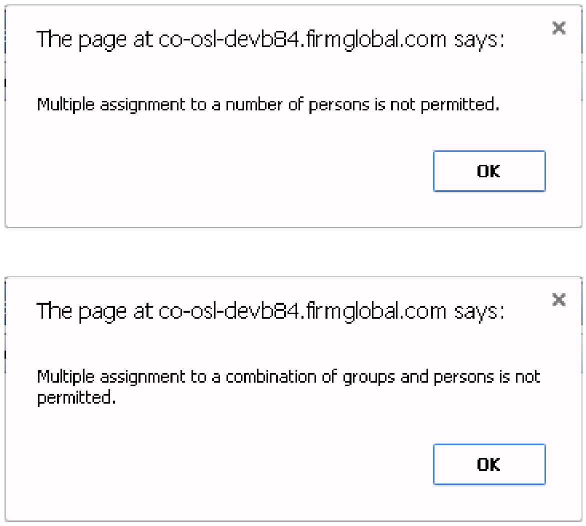


Figure 145 Warning messages displayed when a wrong selection is made

Click **OK** to close the message. Change the selection and repeat the Assign.. action.

This and a number of similar operations can involve processing a large number of records, and any errors will prevent the operation from being completed. The CATI Supervisor system provides a monitor window that shows the main details of the operation and indicates the outcome (go to Monitoring the operation outcome on page 145 for more information).

3.6.9.11. Setting Up the Preview Dialing Mode for an Interview

When the dialer is enabled and the survey you are working with is in the Predictive dialing mode (go to Dialer on page 349 for more information), you can switch the dialing mode for a particular interview to Preview and back to Predictive as necessary.

Note that this is one of three possible ways to select the dialing mode for an interview when the survey is in the Predictive mode (go to Dialer on page 349 for more information).

To change the interview dialing mode from the Call Management window:

1. Display the Call Management window for the required survey.
2. Right-click the required interview or select a number of interviews, and choose **Set Preview Dialing Mode**.

   This operation can be performed either for the selected interviews only, or for the entire list. Note that the Dial Mode column in the Call Management window shows Preview for any interviews that have been switched, and the column remains empty for interviews which were not switched. These interviews will be delivered in the Predictive mode, as is set for the survey.

   To return an interview to the Predictive mode, select the required interviews in the Call Management window, right-click the selection and choose **Reset Dialing Mode** for selected only or the entire list.

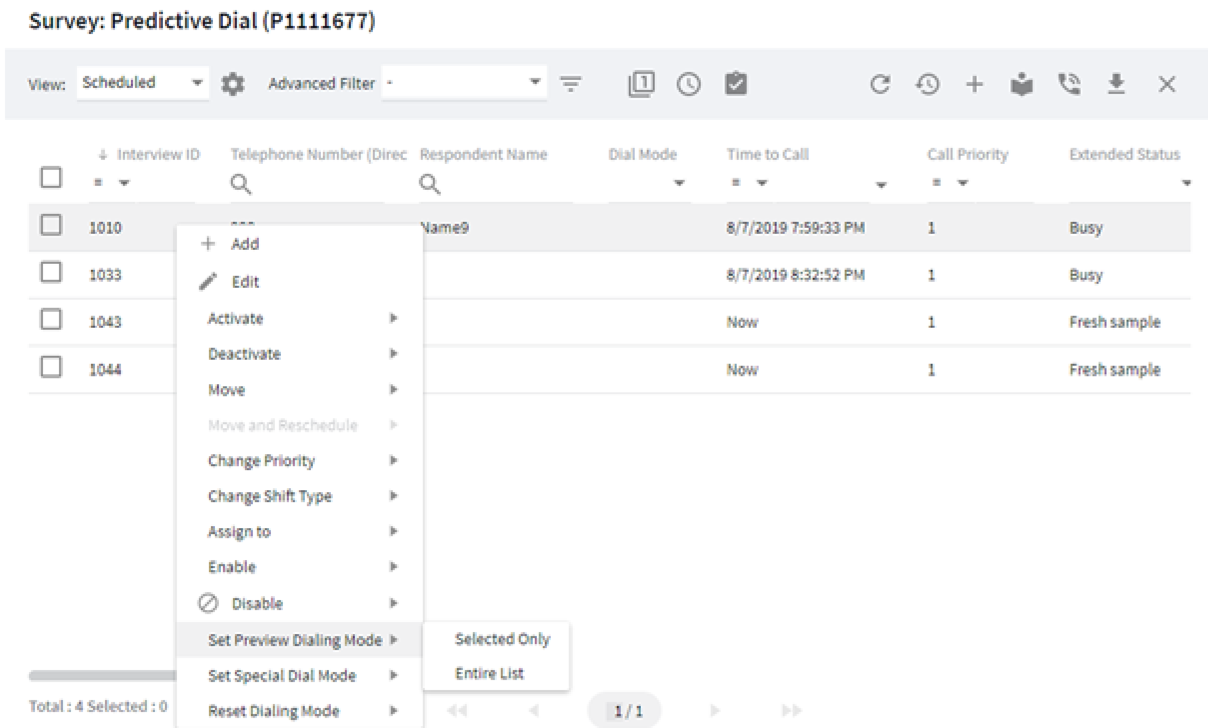


Figure 146 Choosing the dial mode in the Call Management window

3.6.9.12. Setting Up the Special Dialing Mode for an Interview

In some situations it may be necessary to change the default dial mode for a survey for a number of interviews. For example, the current legislation may forbid automatic dialing of mobile/cell phone numbers. Note that the Special dialing mode can only be applied for a survey running in the Predictive mode.

Two options are available:

- The dialing mode is automatically set for the required interviews in the uploaded sample. This task is carried out in the Professional Authoring module and does not require any action from the supervisor.
- The uploaded sample does not contain the dialing mode. In this case the supervisor should follow the instructions below.

This operation can be performed either for the selected interviews only, or for the entire list. Changing the dialing mode does not alter other call properties.

To set up the Special dialing mode for an interview

1. Display the Call Management window for the required survey.
2. Right-click the required interview or select a number of interviews and choose **Set Special Dial Mode**.

   The Dial Mode column in the Call Management window shows "Special Dial" for the selected interviews.

You can reset the interviews to the originally set dialing mode at any time.Select the required interviews in the Call Management window, right-click the selection, and choose **Reset Dialing Mode** for the entire list or selected only.

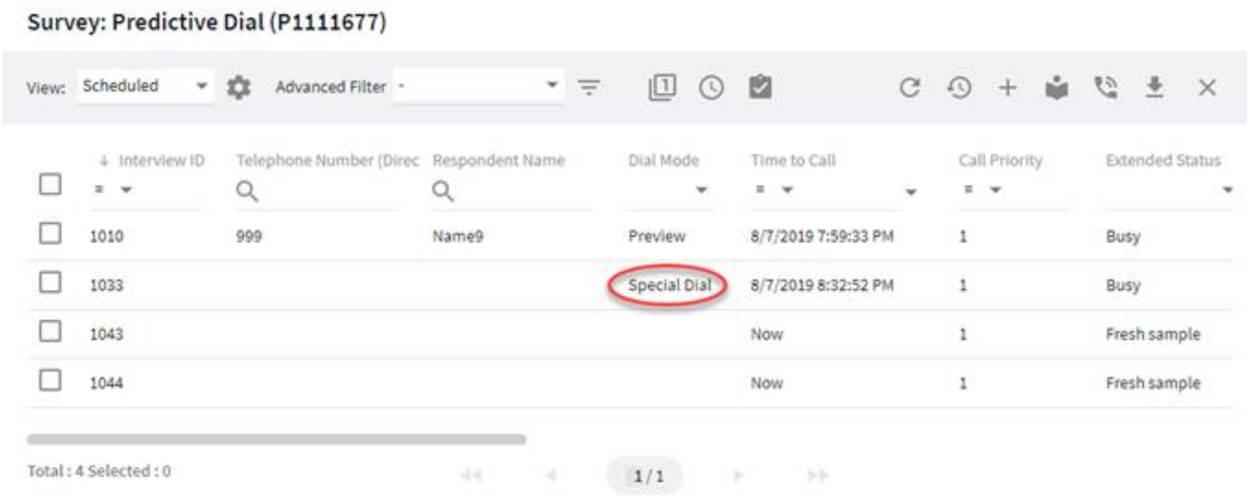


Figure 147 A call with the Special Dial mode set up in the Call Management window

3.6.10. Reviewing Interviews with the Reviewer Application Module

The CATI Supervisor provides a convenient quality control module called Reviewer which enables supervisors to review responses provided to the completed or partially completed interviews. Using this tool the supervisor can select particular interviews from the list of interviews in the Call Management interface to include in a review session, open the created session for review, edit original responses stored with the interviews as necessary, and finally save the edited interviews. The Reviewer module keeps track of all actions that were carried out by users during the review process. The supervisor can browse the overview of performed actions and start any action over again if required.

The permission required to perform reviews is enabled by default for a CATI supervisor. A Forsta system administrator can revoke this permission if necessary.

The Reviewer module supports editing of all types of questions in the Forsta Authoring module.

Any interview question can be played back (go to Playing back a question: on page 164 for more information). When you start playback of a particular question, the appropriate functionality is provided (go to Live Call Monitoring, Recordings and Playback in CATI Supervisor on page 324 for more information).

A ‘session’ in the Reviewer is a single quality control process consisting of one or more interview records. A session is created by a supervisor in order to browse and/or edit answers to the questions contained in the selected interviews. A session provides information regarding the history of changes made to the interview questions, current "status" of a review process and other useful information (go to Working with the Session Overview Page on page 174 for more information). Start either by creating a new "session" (go to Creating a Review Session on page 153 for more information), or by viewing the list of existing "sessions" (go to Viewing the List of Review Sessions on page 155 for more information).

You can stop working in the Reviewer module at any point as any changes are saved automatically when you move from one cell to another or to the next interview record in the session. If a question is not reviewed, or if you have marked a question as "Not Reviewed", this is reflected in the status that this session receives. You can return to any session and either resume work or reopen a completed session for further review work.

The Reviewer module user interface allows you to switch between all available views.

3.6.10.1. Creating a Review Session

To review interviews you must first create a session in the Call Management window. A session contains a sequence of interviews that will be delivered for review in the Reviewer module when this session is opened for review.

You can create a session and open it in the Reviewer module, or you can create a session without opening it; it will then be saved and will appear in the list of sessions in the Reviewer module. Both actions are performed in the Call Management window of the CATI Supervisor module.

Note: A maximum of up to 100 interview records may be added to a single review session.

To create and open a session for review:

1. In any view in the Call Management window, select the interviews you wish to review.
2. Right-click the selection and choose **Review/Selected only**or choose **Review/Entire list** to create a session using all of the interviews that are currently contained within the applied filter.

   A review session is created automatically and the selected interviews are included in the session. The Reviewer module opens and the review session is displayed on the Review Session page. You can commence reviewing the session immediately (go to Reviewing an Interview on page 162 for more information).

To create a session without opening it:

You may need to allocate some interview records to a review session but not perform the reviewing work immediately, or you may need to send the session link to another supervisor so that they can perform the review work.

1. In any view in the Call Management window, select the interviews you wish to review.
2. Right-click the selection and choose **Review/Selected only**or choose **Review/Entire list** to create a session using all of the interviews that are currently contained within the applied filter.

   The Session for review dialog opens.

3. Edit the session name as appropriate - by default it will contain the user name, the survey name, time and date stamp.
4. Choose **OK** to create the session.

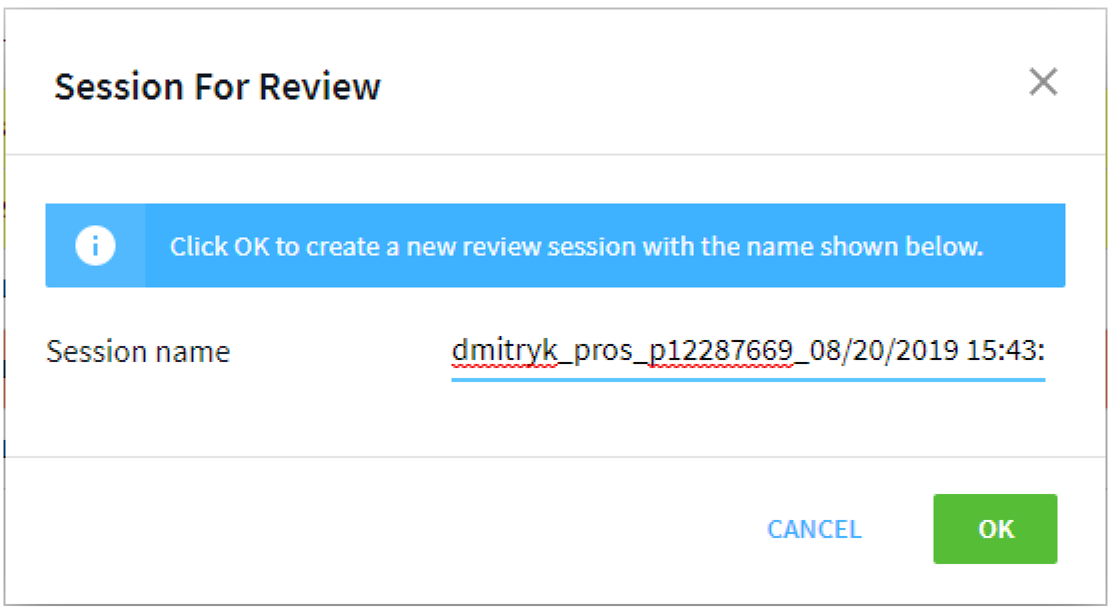


Figure 148 Creating a session - start with the session name

A link is provided which any user who is authorized to access the Reviewer module can use to begin work in the Reviewer module.

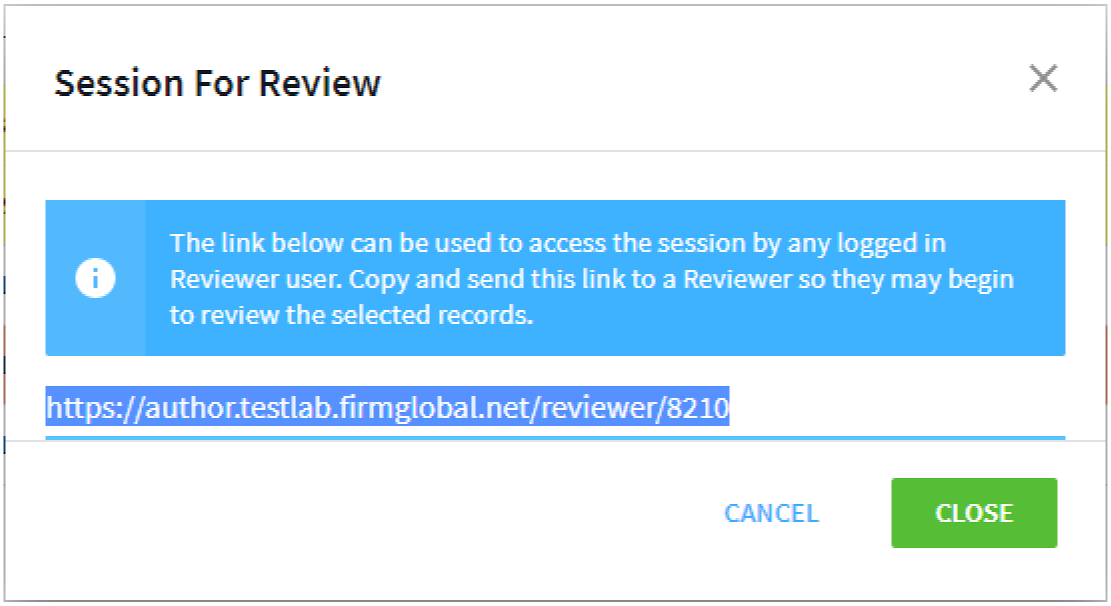


Figure 149 Creating a session - save this link to provide it to a person who will perform the review

5. Save the link, then click **Close** to close the dialog and return to the Call Management window.

3.6.10.2. Viewing the List of Review Sessions

To view the list of review sessions that were created by supervisors working for the company, run the Reviewer module. This module starts in a separate browser window. Note that when a session is deleted it is removed from this list and this action cannot be undone. In the Reviewer module in the Session List view you can perform the following operations:

- View the complete list of review sessions.
- Search and filter the session list by session names.
- Open a session.
- Sort sessions by a chosen attribute.
- Perform some actions with the chosen session.

To view the list of review sessions:

1. Click the **Go to Reviewer** button  on the Call Management window toolbar.

   The Reviewer module opens in a separate browser and the Session List is displayed.

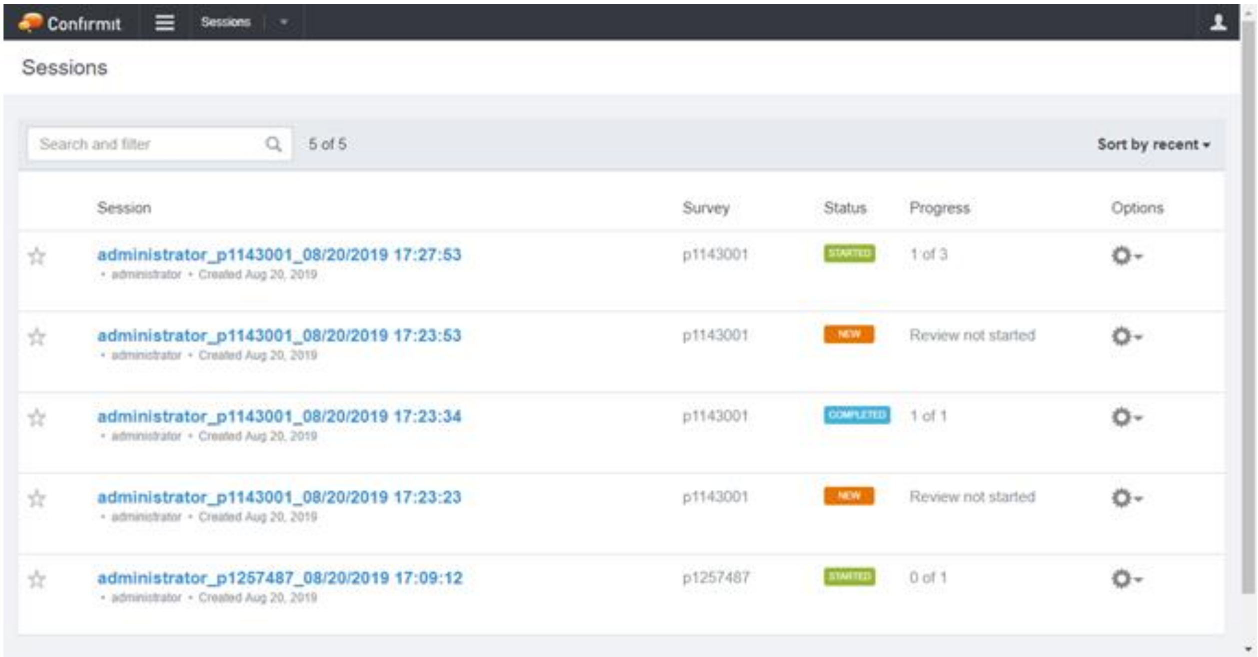


Figure 150 Example of the list of sessions displayed in the Reviewer module

The list columns are as follows:

- The Favourite mark. Click the blank star icon to add a session to your Favourites list - the icon will turn orange. You can later sort the list to bring your favorite sessions to the top of the list.
- The Session name - open a session by clicking its name.
- The Survey column shows the name of the survey to which the interview reviewed in this session belongs.
- The Status column shows the current session status. Status is assigned to a session automatically as the result of the review. The following statuses can be assigned to a session:
  - o**New** - the session was created but no answers were viewed or edited.
  - o**Started** - some answers were viewed/edited.
  - o**Completed** - a supervisor has reviewed all answers. Note that some answers may not have been reviewed, and been marked as "Not reviewed".
- The Progress column shows how many answers from those available were reviewed during the session.
- The Options icon opens a menu with the following options:
  - o**Review** - open session for review with questions that were selected the last time it was opened.
  - o**Rename session** - change the name of the session which is currently displayed in the Session column.
  - o**Overview** - browse the session overview.
  - o**Delete** - delete the current session.
  - o**Complete** - complete the session. This operation asks for confirmation, and provides a choice of possible actions if you are going to complete a session which contains questions that have not yet been reviewed.

You can search the list of sessions by their names by typing any symbol combination in the "Search and Filter" field above the list. The Sessions list refreshes so that it contains only sessions with a name matching the entered filter condition. Clear the "Search and Filter" field and press **Enter** to reveal the complete session list.

You can sort the session list by the following session attributes:

o**Recent** - the most recently created sessions come first in the list.

o**Date created** - the oldest sessions come first in the list.

o**Favourite** - sessions marked as Favourite come first in the list.

o**Name** - sorted by session name in the alphabetical order.

o**Status** - New sessions come first, then come the Started sessions and Completed come last.

o**Created by user** - sorted by the name of user who created the session.

3.6.10.3. Renaming a Session

You can rename a session when you open it on the Session Overview page.

1. Click anywhere in the field that contains the session name, or in the **Options** menu select **Rename**, and edit as required.

3.6.10.4. Selecting Questions to be Included in the Review Session

You can choose which questions are to be included in the review session (when you create a session the list is initially empty). All question types that are available in the Professional Authoring module can be edited in the Reviewer module. To view any information regarding a session, or to review the session, you must first open the session.

The questions are listed on the "All" tab of the "Overview" page which is displayed when you choose the session name on the Session List page (go to Viewing the List of Review Sessions on page 155 for more information), or click the **Questions** link on the Session Review page (go to Reviewing an Interview on page 162 for more information).

To view the list of interview questions and select some or all for review:

1. Click the session name in the Sessions list in the Reviewer module, or click the **Questions** link on the Session Review page.

   The session record opens in the "Select Questions" view on the "All" tab. This tab lists all questions in the current interview. The questions are presented in the order in which they appear in the interview. If questions are already selected the page will display the "All" tab. When no questions are selected, the link to the Review page is not available.

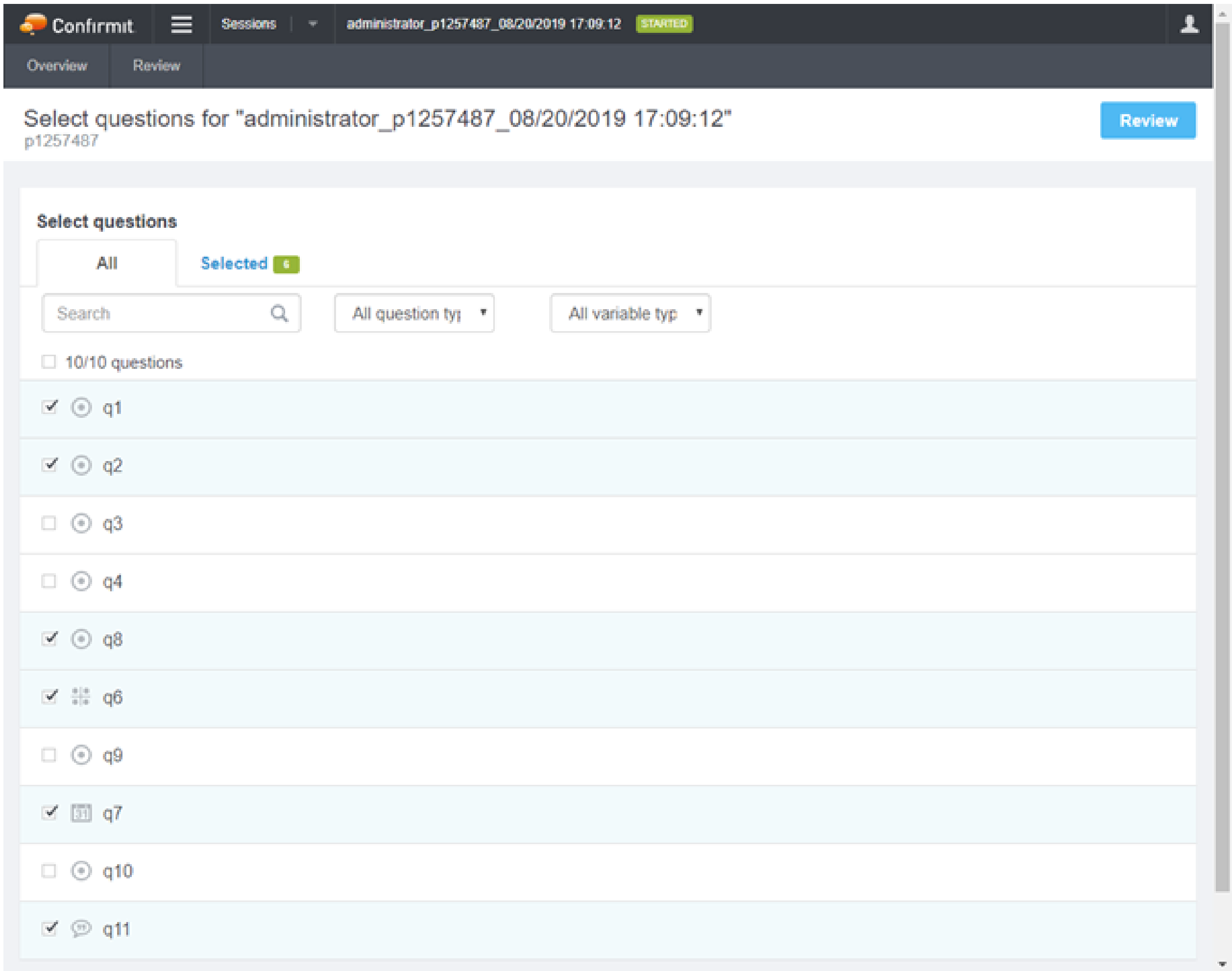


Figure 151 Example of the session opened on the All questions tab

If you have previously selected questions for this session then you can go to the Selected tab to view just those questions.

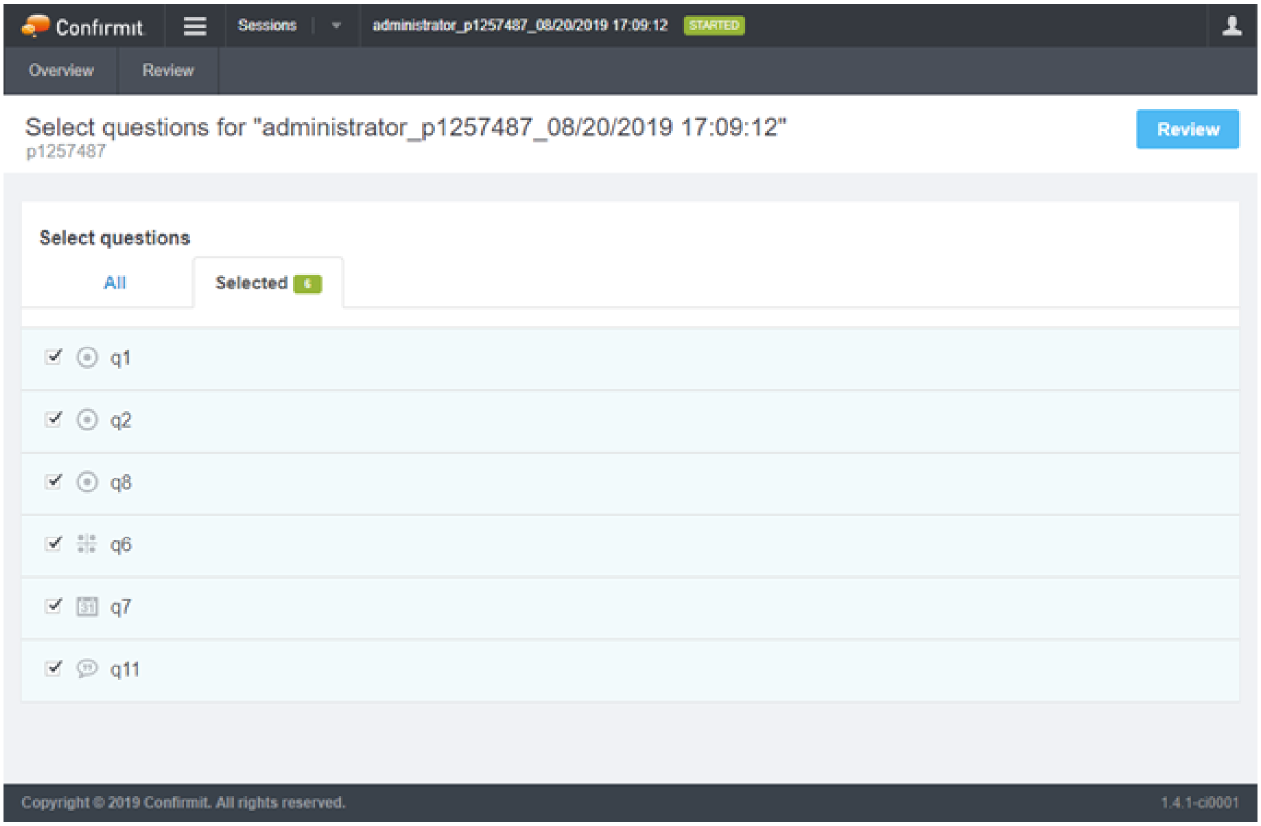


Figure 152 Session opened on the Selected questions tab

The green counter on the Selected tab indicates the number of questions currently selected for review.

2. Check the box for each question you want to include in the review session, clear the box if you need to remove this question from review session.

   In the All list, use the Search box above the question list to enter filter criteria and search for questions by name. Reserved characters such as ampersand and asterisk are allowed in this box - use these special characters to create logical expressions. You can also select the question type from the drop-down box to filter out all other question types.

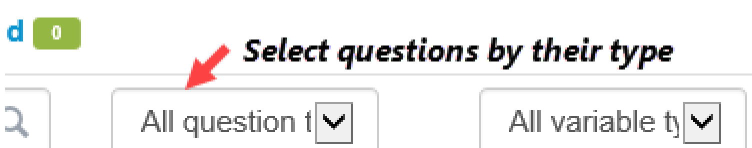


Figure 153 Selecting questions for review by type

Filter questions by variable types used in the question - select one from another drop-down box to do this.

Figure 154 Selecting questions for review by variable type

On the Selected tab you can remove a question from the session by clearing the corresponding box. As you will be changing the list of questions included in this session, if the session has already started the system will prompt you to reset the session status. The following warning will be displayed:

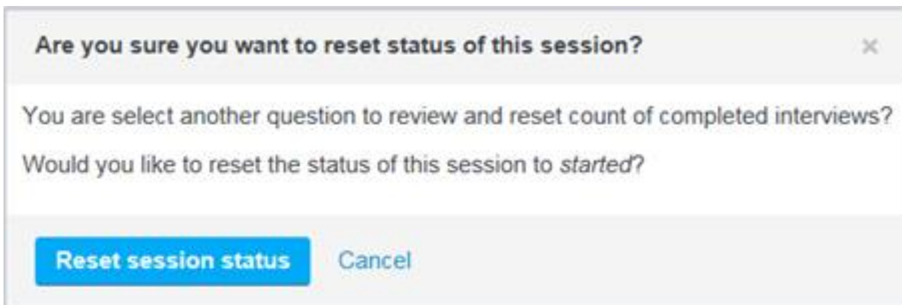


Figure 155 Warning displayed when a question is removed from the started/completed session

3. Click the **Reset session status** button.

   The status is set to New, the warning dialog closes and the Selected tab is displayed.

To view the session overview:

1. Either go to the **Option** menu **Overview** command, or click the Overview tab on the opened Session page.

   In both cases the Overview page for the session opens.

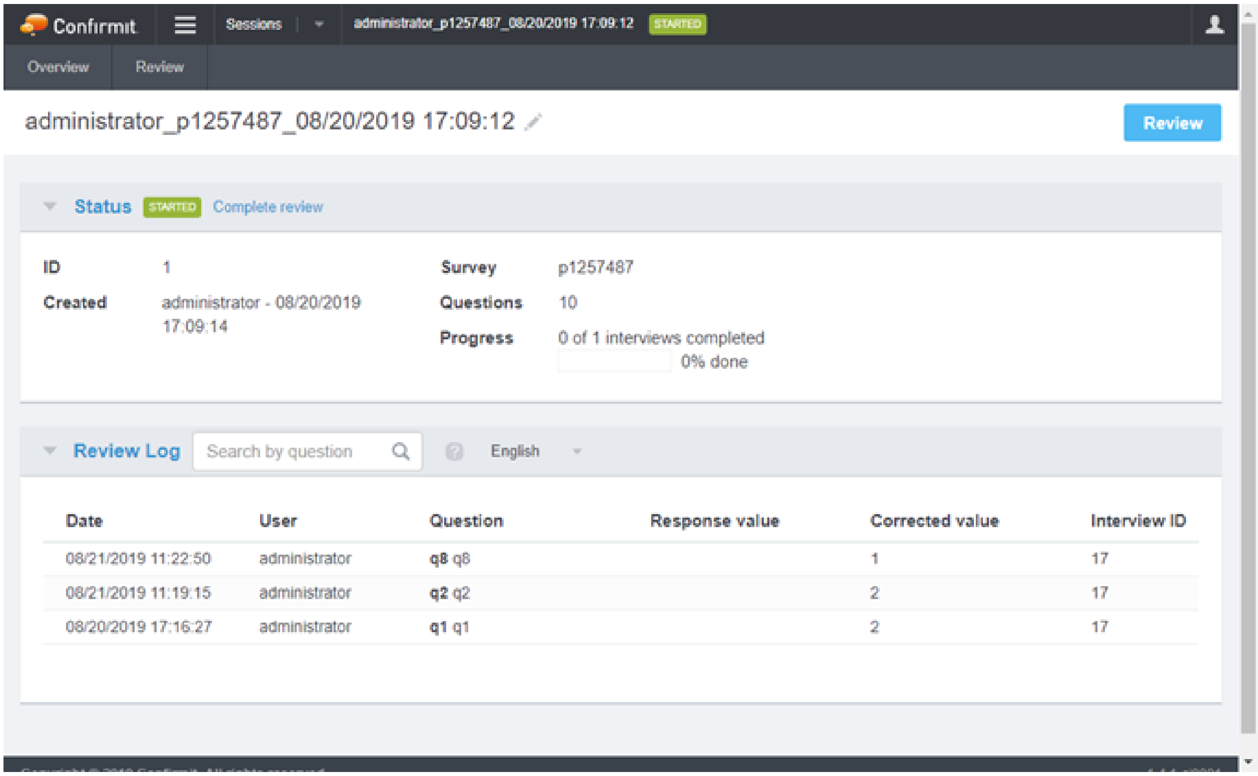


Figure 156 Example of the Overview page for the opened session

Here you can rename the session. Click in the session name field below the Overview and Review tabs, and edit as required.

The information block displayed on this page shows the following:

oThe session status highlighted in the appropriate color.

oThe session ID.

oThe date and time when the session was created, and the name of the user who created the session.

oThe name of the survey that contains the interviews reviewed in this session.

oThe number of questions in the interview.

oA description of the session progress.

To start a review:

1. To start the review, either:

- Click the Review tab at the top of the page above the session name,
- Click the blue **Review** button on the right while you are on the "All" or "Selected" tabs in the Select Questions view.
- On the Sessions page, go to the **Options** menu and select the **Review** command.

The Session page opens with a grid of the questions (go to Reviewing an Interview on page 162 for more information).

3.6.10.5. *Reviewing an Interview*

To review an interview, select the questions that are to be included in the review (go to Selecting Questions to be Included in the Review Session on page 157 for more information). Note that if no questions are specifically selected on the Session page then all interview questions are included in the review.

To open the Review page and start the review do one of the following:

- When you are browsing the Sessions list - choose **Review** from the Options drop-down menu.
- When you are browsing the Session page > Review tab - click the blue **Review** button in the upper-right corner of the page, or choose the Review tab.
- When you are browsing the Overview of the completed interview - click the **Reopen Review** link.

The Review page opens with all the questions that are selected for review.

The Review window

The Review window allows you to review the interview questions included in the current review session. The reviewing process involves reading the questions, checking the responses provided, and correcting the responses when necessary. You can play back a recorded question to recreate the way it was recorded (see below). The grid on the Review page provides the question text and selected response options - all the information necessary for a supervisor to check and correct the responses. Questions normally fill row in the grid. If the question is open-text, the response is provided in the form of free text. Some question types, for example 3D grids, are expanded so they occupy two or more grid rows depending on the number of response options in the question. In this case reviewing is performed separately for each response option.

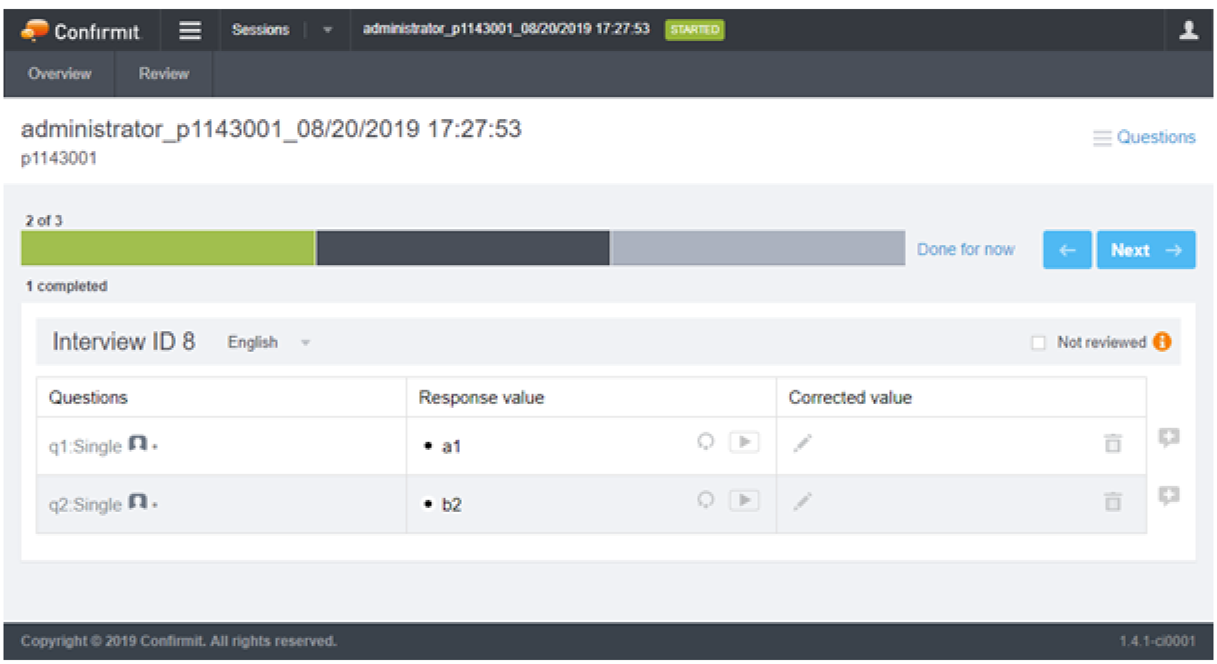


Figure 157 Example of the Review window showing a session with two interviews completed

The Review window contains the following information

- The Review page header - this contains a link to the Sessions List Page Sessions (go to Viewing the List of Review Sessions on page 155 for more information), and beside this a drop-down control which allows you to open any of the recent sessions in the Session Overview page (go to Working with the Session Overview Page on page 174 for more information). The header also displays the session name and the status indicator.

- The Overview and Review tabs - the Overview tab opens the current session in the Session Overview page (go to Working with the Session Overview Page on page 174 for more information), and you are currently working with the Review tab - the Session Review page.
- The Questions link towards the upper-right corner of the page takes you to the Selected Questions page (go to Selecting Questions to be Included in the Review Session on page 157 for more information). Here you can add or remove questions from the list of selected.
- The review progress bar. In the picture above this bar shows that one interview of the three selected is reviewed - the first section of the bar is highlighted in green and the text below the progress bar says: "1 completed". The counter above the bar says the user is currently looking at the second interview: "2 of 3", and the second section of the progress bar is highlighted in dark grey, indicating the second interview in the review sequence is currently being reviewed.
- The "Done for now" link allows you to leave the review session before you have completed reviewing all the interviews. You can click this link at any time before you finish reviewing. This action does not assign the "Completed" status to the session, it simply allows the user to leave without changing the current session status (go to Session Status Indicators on page 176 for more information). This action takes you to the Sessions list.
- The **Next/Previous** and **Complete** buttons are shown to the right of the review progress bar. While you review the first interview in the sequence, only the **Next** button is available. When you move to the next interview both the **Previous** and **Next** buttons are visible, and when you reach the last question the **Next** button changes to the **Complete** button. Press **Complete** to finish the current review and assign the interview the Completed status.

  Note that you can click on the segments in the progress bar to navigate to the corresponding interview record although this is only possible for records that have already been reviewed - you cannot move past records that have not yet been reviewed.
- The grid header in the picture above shows that the Interview with ID 8 is first in the review sequence and the grid currently displays responses collected in the course of Interview ID 8. The grid header also contains a drop-down control which allows you to change the current language used in the question texts and response options.
- Check the "Not reviewed" box to add a bookmark signaling that this interview was not reviewed and might need further attention. When checked this option also triggers a warning displayed below the progress bar and highlights the corresponding interview section on the progress bar in orange.

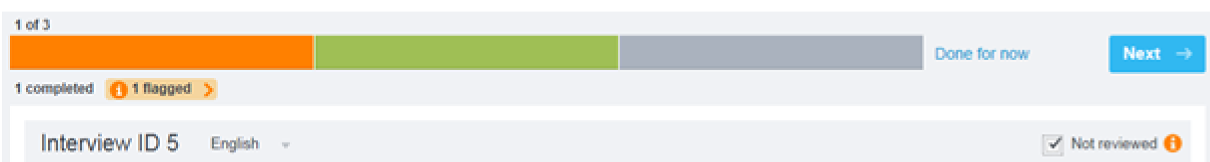


Figure 158 Not reviewed warning shown in the review grid

Click the warning to expand it and display the relevant interview ID as a hyperlink. You can then click the interview ID and be redirected to the corresponding interview.

When the flagged interview is finally reviewed you can remove the bookmark by clearing the Not reviewed box. All highlighting will then also be removed .

Performing a review:

When the review session opens in the Review window work begins with the interview displayed in the review grid. Move to another interview by clicking the **Next** and **Previous** buttons. Information about a question is presented in the Questions column. The Response value column shows the response value that is stored in the database at the moment the review session is started.

If this question type allows you to edit the response value, the cell will contain an action icon for resetting the edited response value back to its original value. A playback icon is also available to start playback of the recording related to the question.

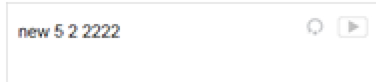


Figure 159 Response value showing the original response value and action icons

Playing back a question:

Click the **Playback** icon to start playback of the recorded interview. This plays back audio and video tracks if they were recorded at the time the question was answered by the respondent (go to Live Call Monitoring, Recordings and Playback in CATI Supervisor on page 324 for more information). This functionality is only available for surveys with the "Enable whole interview screen recording" and "Enable whole interview audio recording" options enabled in the Forsta Professional Authoring module (go to Live Call Monitoring, Recordings and Playback in CATI Supervisor on page 324 for more information). Playback of the recorded interview starts with the response you are currently editing. After the part of the interview containing video and audio corresponding to this response finishes, the playback is stopped. The CATI Supervisor player window stays open and waits for user action. You can either close the player window at this point or click the **Play** button in the player to proceed to the recording of the next question. When the end of the recording is reached, playback stops and the CATI Supervisor Player window closes automatically. An indication of the number of recorded versions of the response is displayed next to the **Play** button in the Response value cell 1.

The **Reset** icon appears in the Response Value cell after the response value is edited. Before a response value is edited the **Reset** icon is hidden. Click **Reset** to reset the response value to the first corrected value that was entered in the Corrected value cell.

Note that the reset icon may be used to undo any changes applied in the Reviewer at any stage of the review process.

1. If a response requires correction, click a cell in the "Corrected value" column. If this question type allows correction of the current response value, the cell in the "Corrected value" column will display action icons - a pen icon and a bin icon:

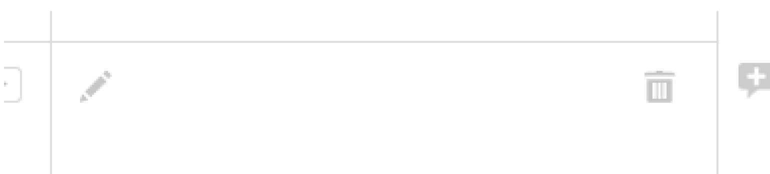


Figure 160 Corrected value cell containing action icons

2. The Response value cell may appear empty if no response was entered or if the question was skipped during the interview. To introduce a correction for an open text response click in the Corrected value cell when it displays either some text or a pen icon . The current text in the Response value column is copied automatically into the Corrected value cell. When the Corrected Value column contains text, the pen icon is hidden although you can still edit the text by simply clicking in this cell.

3. Click the trashcan icon to delete contents of the Corrected Value cell. The system asks you for confirmation. The original response value will be shown with strikethrough applied to show that it has been deleted from the survey data. This action can be reversed using the reset button if needed.

Figure 161 Warning message displayed upon attempt to delete a corrected response value

Choose **Yes** to proceed with deletion. The cell is cleared and the trashcan icon disappears.

4. You can add comments whilst reviewing (these comments will not be written to the survey data). To do this, click the **Comment** icon to the right of the Corrected response cell. The Add comment dialog opens.

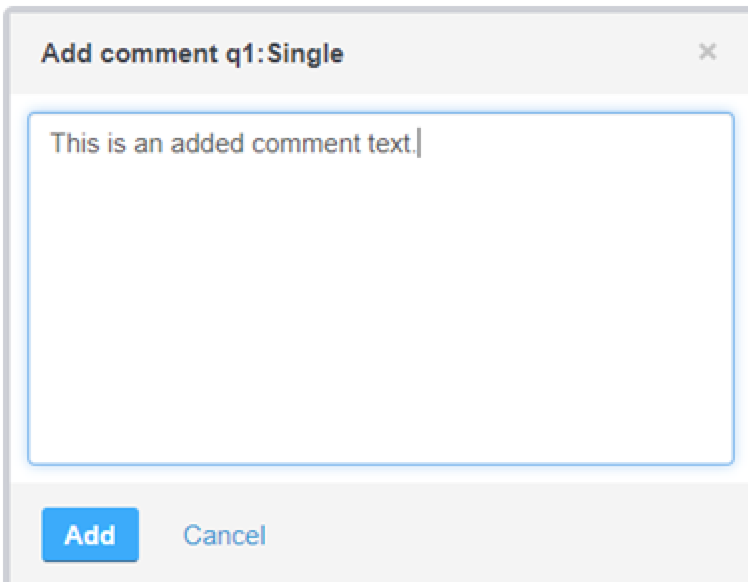
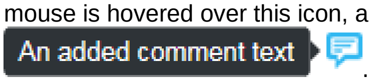


Figure 162 Adding comment to a question

Type your comment into the dialog and click **Add**. The comment is stored and it will become visible when a user hovers a mouse over the Comment icon, which changes to after a comment is added. When the mouse is hovered over this icon, a pop-up is displayed containing the entered comment text



.

5. When you are through reviewing the current interview, proceed to the next by pressing the **Next** button Next. The grid is refreshed and the response values for the next interview questions are displayed.

6. When you finish reviewing the final interview in the current review session, click the **Complete** button Complete. This assigns the Completed status to the current session and takes you to the Session Overview page where you can view all the information related to the current session and browse the review log (go to Working with the Session Overview Page on page 174 for more information).

7. You can also complete a review session at any point (go to Completing an Unfinished Session on page 173 for more information).

Any session which is assigned the Completed status can be reopened for reviewing at any moment later (go to Reopening a Completed Review Session on page 175 for more information).

3.6.10.6. Reviewing Questions of Different Types

The Reviewer module allows you to edit all question types that are used in Forsta surveys, using an interface displayed in the Corrected field when you start to edit the question.

This section describes the interface. The question types require a similar approach for editing, although some differences exist in the question layouts. For example, questions of the grid type are always displayed in the list on the Review page as "expanded list of answers", with each answer shown on a separate line. A single question uses a similar interface for editing regardless of whether this question is a part of another question of a different type, or whether it is a separate standalone question.

The Reviewer module uses icons to help you to identify the question type and the actions that you can perform (go to "Badges" and Action Icons used in Reviewer on page 172 for more information).

Note: You always correct the latest response value which is currently stored in the database. The value displayed in the Corrected value field is the latest edited version of the response, so when the Corrected value field is shown empty, you will be changing the Original value.

Important
For all question types, a corrected response value is saved to the database when you leave the Corrected value field, for example by choosing another object in the window or by leaving the page/tab. There is no other way to save a corrected response value.

Note: A response of an "Other" type can be used as a response option. This type of response is always displayed as a separate row (which is adjacent to other response options) no matter what the question type it is, and a response value for this option is selected/entered separately.

Editing a Single question:

A single question is represented as a single row in the Reviewer module (with the exception of an "other" response option - see the Note above).

Figure 163 A Single question displayed in the list of responses

- To delete an answer which is currently stored in the database, click the "Trash-bin" icon; the answer is removed from the "Response value" field. Simultaneously, if any Corrected response value was selected prior to this action, this value is removed from the Corrected value field. If you do not choose another answer and move focus away from the Corrected value field, the deleted answer is displayed in the Original response field as stroke through.

- To correct a currently existing answer by choosing a new one, click in the Corrected value field. A drop-down list of available response values and a search string opens. The value that is currently stored in the database is automatically highlighted in the list. If the value has been previously deleted or has not been provided, the field will appear empty.

  Select the required value from the list. You can use the search string to find the value you need. Type characters into the field; the matching values are shown while other values are hidden.

  When you select a value it is displayed in the Corrected value field. As only a single choice is allowed here, when you select another option it replaces the previous one.

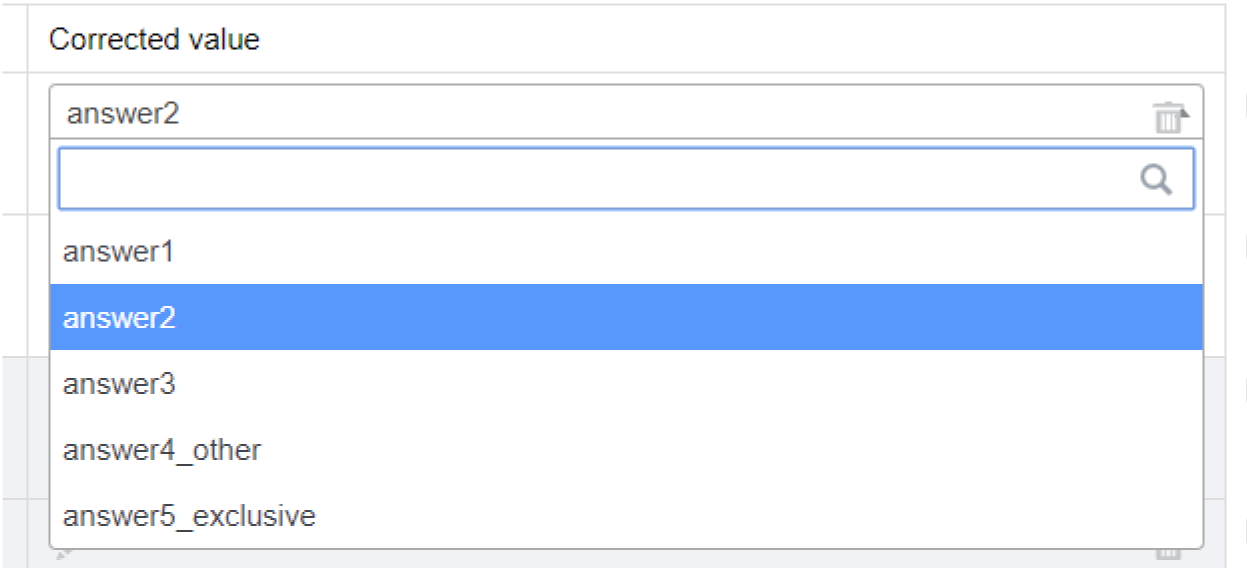


Figure 164 Selecting an answer for a Single question

Editing a Multi question:

A multi question is represented as a single row in the Reviewer module (with the exception of an "other" response variant - see the Note above).

To correct a currently existing answer by choosing a new one, click in the Corrected value field. A drop-down list of available answer options and a search string unfolds. All values that are used in the response currently stored in the database are highlighted in the list. If the answer has been deleted previously or has not be provided, the "Corrected value" field for this question will appear empty.

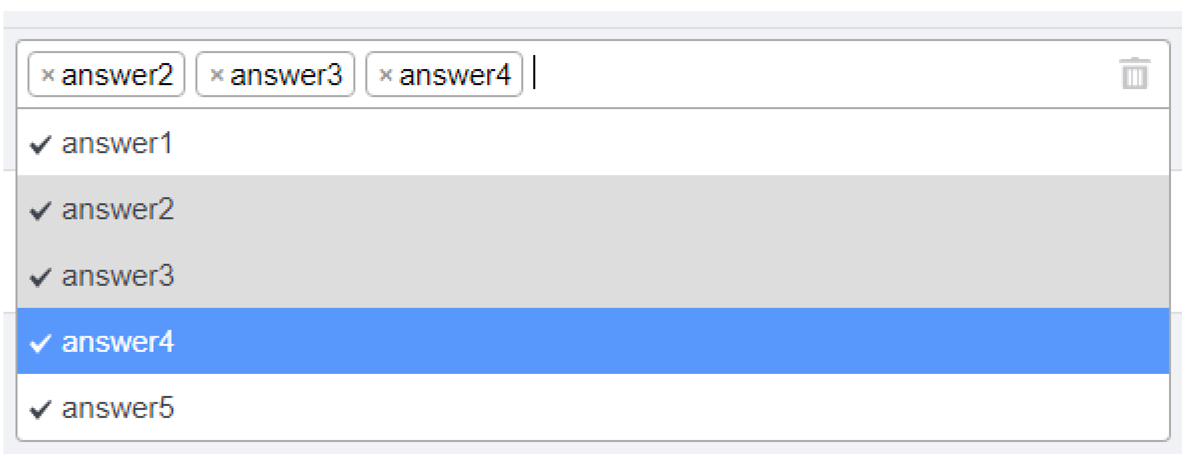


Figure 165 Currently selected values for the "multi" question

- To delete all the response values that are currently stored in the database, click the "Trash-bin" icon. All values are then removed from the "Response value" field. Simultaneously, all response values are removed from the "Corrected value" field.
- To delete one value, click the **X** icon inside the button corresponding to the required answer. Repeat to delete more answers.

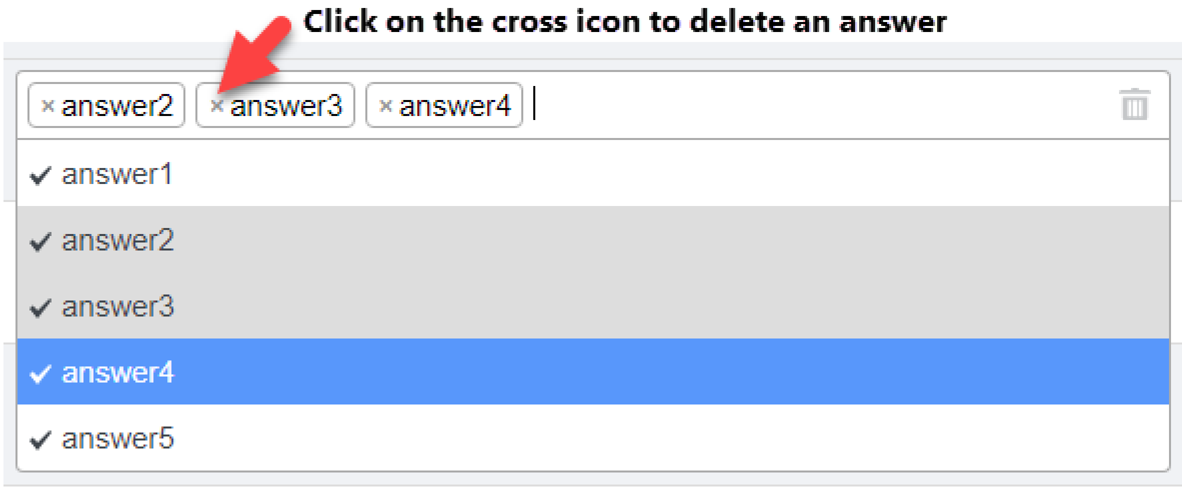


Figure 166 Deleting an answer from the multi question

When you move focus away from the Corrected value field, any answers that have been deleted are displayed in the Original response field as stroke through.

Editing a Grid question:

For Grid questions, all answers are displayed in the Reviewer module as separate rows (see the example below). Each answer can be considered a single question, and it is edited in the same way (see (go to Editing a Single question: on page 166 for more information)).

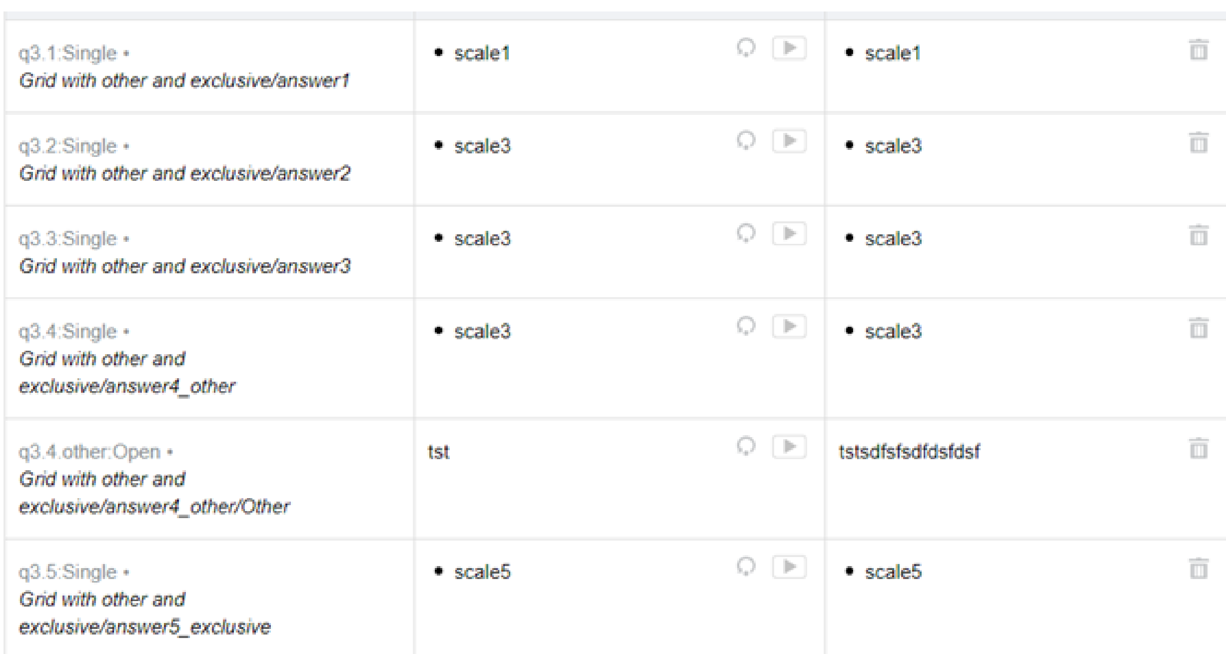


Figure 167 A single grid question as displayed in the Reviewer module

As with other question types, the Other and Exclusive questions are displayed on separate rows - they are separated from the grid answers they belong to (see the picture above).

You cannot delete all answers at once from the Grid questions - only one single answer can be edited at a time.

Editing a Multi Grid question

A Multi Grid question is displayed similar to a Grid question, and each answer is displayed on a separate row and looks and behaves like a multi question, see the example below.

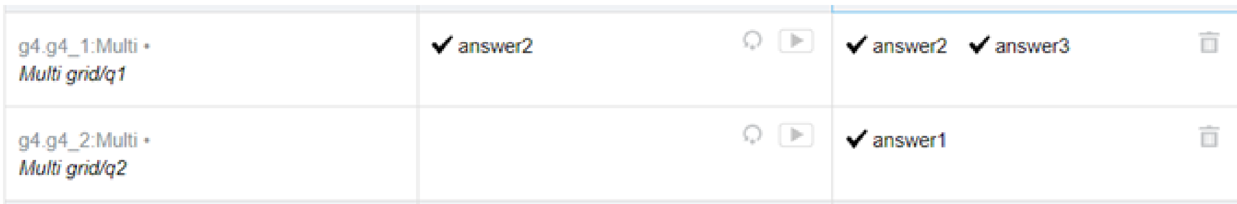


Figure 168 Editing a Multi Grid question

Follow instructions applicable to a Multi question to edit answers from a Multi Grid question.

Editing a 3D Grid question:

A standard 3D Grid question can combine different types of questions in a single grid. In Reviewer, this type of question is displayed as "one question per row" and each row displays the question type name. The 3D Grid question in the example below uses two types of questions; a single and a multi.

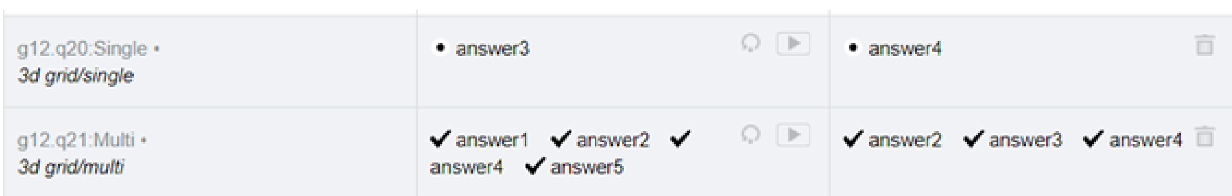


Figure 169 Editing a 3D Grid question

Editing technique for each question type is described in the corresponding section of this topic.

Editing an Open Text question:

An Open Text question is displayed as a single row. The value of an answer is any combination of characters, the format is not restricted.

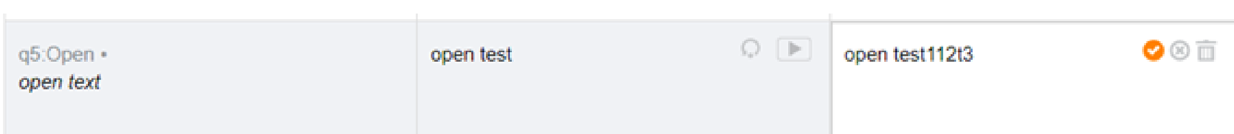


Figure 170 Editing an Open Text question

An Open Text question does not provide a specific interface for editing the answer value - choose the Corrected Value field and edit the text there. Use the quick action icons to submit, delete an answer or a character.

Note that if a value in the Corrected Value field is deleted and the cursor is moved away from this field, the answer value is completely cleared and the Response Value field is shown as stroke through.

Editing a Numeric question:

A numeric question in Reviewer looks and behaves similar to an Open Text question, the difference being it will consist of digits only.

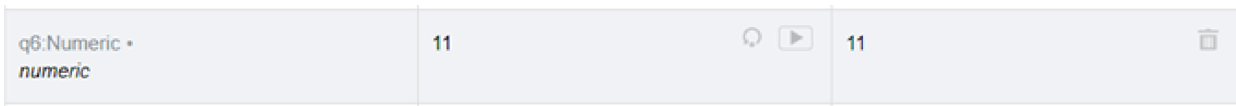


Figure 171 Editing a Numeric question

Editing a Numeric List question:

This type of question is shown with each answer occupying a separate row. Answers are in numeric format, so the editing technique is the same as that used with the Numeric question.

Figure 172 Editing a Numeric List question

Editing an Open Text List question:

This type of question is shown with each question occupying a separate row. Answers are in open text format, each is edited separately.

Figure 173 Editing an Open Text List question

Editing a Date question:

An answer to a Date question is provided in a predefined format.

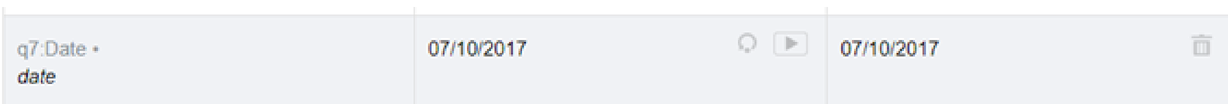


Figure 174 Editing a Date question

If you try to save the value in the wrong format, the Reviewer prompt you with the correct format.

Figure 175 Example of the warning prompt

Editing a "loop" question:

A loop question comprises a set of questions which in Reviewer are presented separately for each loop. Loop question sets are identified with a prefix on the row.

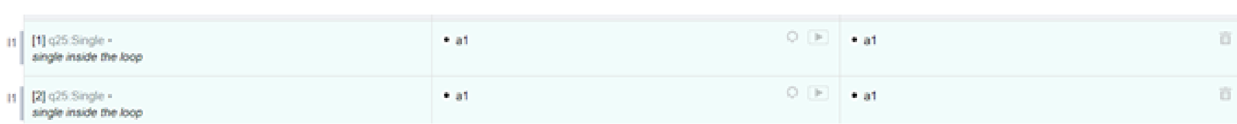


Figure 176 A "loop" question interface

A loop can comprise questions of different types. Questions belonging to one loop are shown in the order they are presented on the survey page. Each answer is identified by a number in square brackets preceding the question name, indicating the sequence of this question in the loop. The various question types are edited as described previously on this page.

Editing a Ranking question:

A Ranking question is presented and edited as a Multi question. The only difference is that with this question type, icons are used to identify the answers.

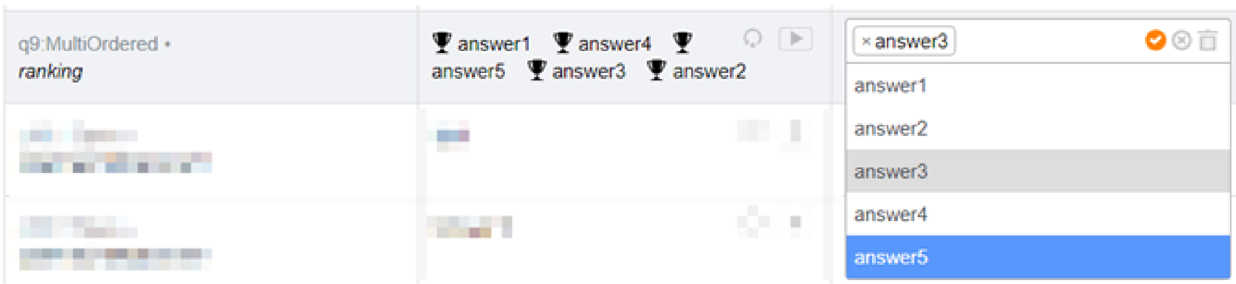
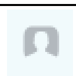


Figure 177 Editing a Ranking question

3.6.10.6.1. "Badges" and Action Icons used in Reviewer

The following badges and icons are used to represent particular types of actions and questions in the Reviewer module.

Badge	Question type		Action icon	Type of action
	3D Grid			Delete the original response value provided by the respondent.
	Date			Add a comment to the question.
	Geolocation			Play back a recorded question (plays back audio if present).
	Grid			Indicates that the question is editable.
	Image upload			Restores the original response value.
	Multi grid			Indicates that a comment was added by the reviewer.
	Multi question			
	Numeric list			
	Numeric			
	Open text			
	Open text list			
	Ranking			
	Single			

	Background			
	Hidden			

3.6.10.7. *Completing an Unfinished Session*

You can complete a review session at any time. Completing a session will stop further review of any interviews included in the current session, and will mark the session as completed. Note that a session which is assigned the Completed status can be reopened for reviewing at any time.

There are two ways to mark a session as completed "prematurely" (before all interviews are actually reviewed):

- A review session can be marked as completed from the Session Overview page.
- The "Complete" menu item can be selected from a drop-down menu in the Options column in the Session List.

To complete an unfinished session from the Session Overview page:

1. Go to the Session Overview page and open the required session.
2. Click the **Complete review** link.

   A dialog is displayed, warning you that some interviews (with the number and interview IDs listed) have not yet been reviewed.

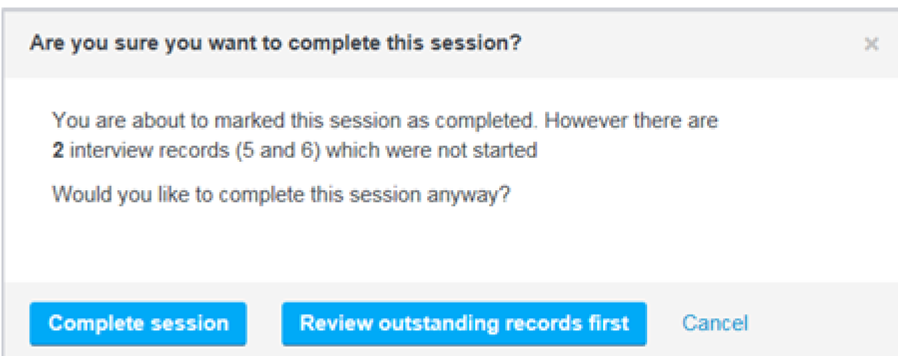


Figure 178 Warning displayed when an unfinished review session is being completed

To ignore the unfinished interviews and complete the session anyway, click **Complete session**, or return to the Session Review page and complete the session (go to Reviewing an Interview on page 162 for more information).

To complete an unfinished session from the Session List page:

1. Go to the Session List page and locate the required session (go to Viewing the List of Review Sessions on page 155 for more information).
2. Choose **Complete** from the drop-down control in the Options column.

   You will be prompted as described above (go to Warning displayed when an unfinished review session is being completed on page 173 for more information).

3.6.10.8. Working with the Session Overview Page

A Session Overview page provides you with information regarding the session properties and allows you to browse the session log. The session log lists all actions that have changed interview response values in any way. The Session Overview page allows you to:

- Rename the session.
- Open the session for review (for sessions with the New or Started status).
- Reopen the session for review (for sessions with the Completed status).
- Complete the session (for sessions with the Started status).
- View the session properties.
- View the session review log and search this log by question name.

To open a session on the Session Overview page

1. In the Option column on the Session List page go to the drop-down menu and select **Overview** , or click the **Overview** tab at the top of the Question List page.

   The Session Overview page opens.

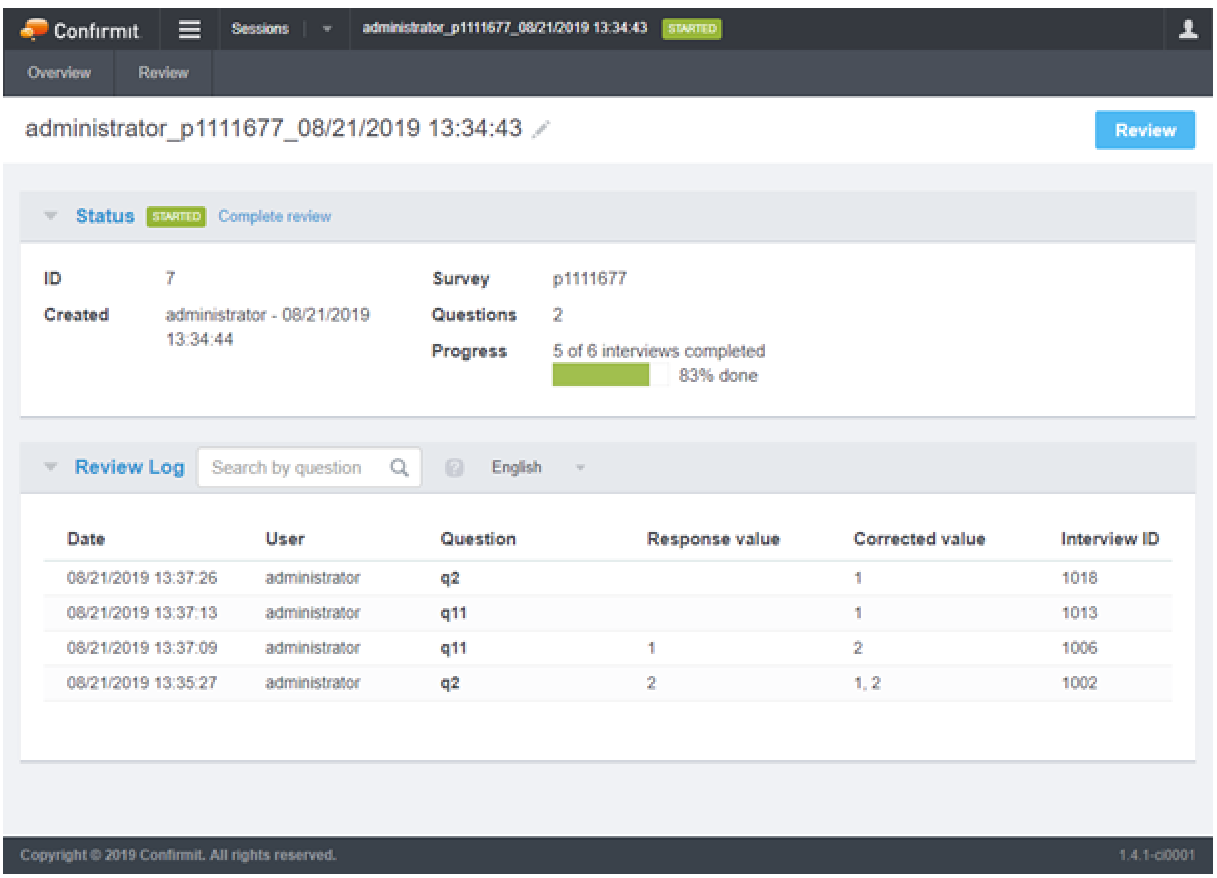


Figure 179 Review session information displayed on the Session Overview page

The details and functionality available in the header areas include:

oThe Sessions link, which opens the Session List page (go to Viewing the List of Review Sessions on page 155 for more information)

oThe Recent sessions list drop-down control, which allows instant opening of the recent sessions in the Session Overview page.

oThe session name.

oThe session status indicator (go to Session Status Indicators on page 176 for more information).

oThe two tabs below the header frame are Overview (the page you are currently browsing) and Review (opens the session you are currently viewing in the Session Review page (go to Reviewing an Interview on page 162 for more information).

oThe session name as an editable field; click in the field to edit the session name.

oThe **Review** button 

- starts a review of the session you are currently viewing and takes you to the Session Review page (go to Reviewing an Interview on page 162 for more information).

The main area of the page displays the session properties:

o The session status (go to Session Status Indicators on page 176 for more information) and an action link which depending on the current review status allows you to complete a "Started" review session (go to Completing an Unfinished Session on page 173 for more information) or reopen a "Completed" review session (go to Reopening a Completed Review Session on page 175 for more information).

oCurrent session properties: session ID, creator name, time/date of session creation, the name of a survey which the reviewed interviews belong to, total number of questions in the interview, progress report showing count and percentage of reviewed interviews.

The review log is a grid listing all actions taken in the course of reviewing the current session, with each row corresponding to a single review action. The grid presents information in columns:

oThe date/time of the action.

oThe user who performed this action.

o The question involved.

oThe original response value.

oThe corrected value.

oThe interview ID.

The review action grid is searchable by the question name. Type a character combination into the search field - a "Search by question" prompt is displayed there. Special characters such as asterisk, ampersand, comparison signs etc. are supported. You can use a logical expression to search for question names.

3.6.10.9. Reopening a Completed Review Session

You can reopen any completed review session at any time:

- By clicking the **Reopen review** link on the Session Overview page.
- By choosing another question set on the Selected Questions page. You may either select an additional question or remove an existing question from the selected set of a completed review session.

To reopen a completed review session using the Reopen review link:

1. Open the session overview page either by choosing the Overview tab below the header frame of the Reviewer module window or by choosing Overview from the drop-down control in the Options column on the Session List page.
2. Click the **Reopen review** link beside the status indicator (go to Working with the Session Overview Page on page 174 for more information).

   The selected session opens on the Session Review page.
3. Proceed with reviewing the session (go to Reviewing an Interview on page 162 for more information).

To reopen a completed review session by choosing another question set on the Selected Questions page:

1. In the top frame of the Reviewer module window, click **Sessions** and choose the required completed session from the list.

   The session opens in the Selected Questions page (go to Selecting Questions to be Included in the Review Session on page 157 for more information).

2. Add another question or remove a question from those already selected.

   A dialog opens asking you whether you want to reset the session status from "Completed" to "Started".

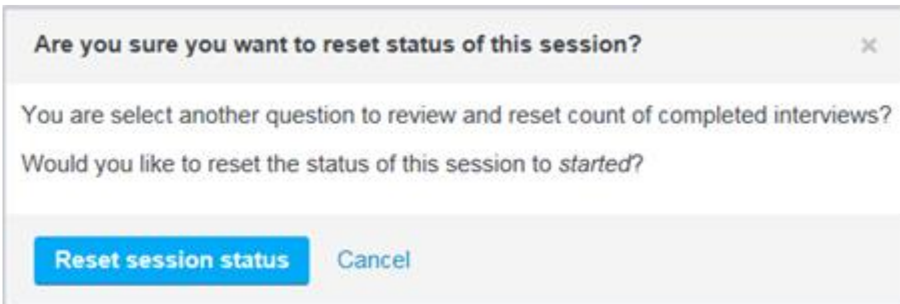


Figure 180 Redefining question set used in a completed session and putting this session into a "Started" state

3. Click **Reset session status** to confirm.

   The session is assigned the "Started" status and opens in the Session Review page ready for reviewing (go to Reviewing an Interview on page 162 for more information).

3.6.10.10. Session Status Indicators

A Review session can be in one of three statuses. Status and progress notifications indicate the current status of the session and how many interviews must be reviewed for this session to be completed. Each status has a colored indicator:

- NEW - the session was just created and no questions have been reviewed as yet, or the session status has been reset and all questions are treated as "not reviewed".
- STARTED - the review is currently in progress and some interviews have not yet been reviewed. It can also mean that reviewing may have been halted but will be continued later.
- COMPLETED - the review is completed and all interviews included in the session have been reviewed.

3.6.11. Recording and Playing Back Conversations

The CATI Supervisor module allows you to record the interviewing process, called Deferred Monitoring (go to Live Call Monitoring, Recordings and Playback in CATI Supervisor on page 324 for more information). To enable deferred monitoring, the *Enable whole interview audio recording* option must be enabled on the **Survey Settings > CATI Options** tab for the survey in the Forsta Authoring module (refer to the Authoring manual for details).

The supervisor can review the audio recording using the Call Management dialog interface controls. Recorded audio files can be played either directly from the dialing system server, or downloaded and played locally. The file name and extension are displayed in the Audio Player dialog box.

To play back the recorded interview:

1. To check which interviews contain recorded audio tracks, click the **Retrieve Audio** button in the Call Management dialog.

   The Interview/call list is refreshed, and all interviews that have an audio recording available for playback are highlighted in the list in the Call Management window - the Interview ID cell for such interview turns yellow.

2. Right-click the required interview in the list in the Call Management window and choose **Play Audio** from the context menu that appears.

   The built-in audio player utility starts in a separate window. Playback of the audio track starts automatically.

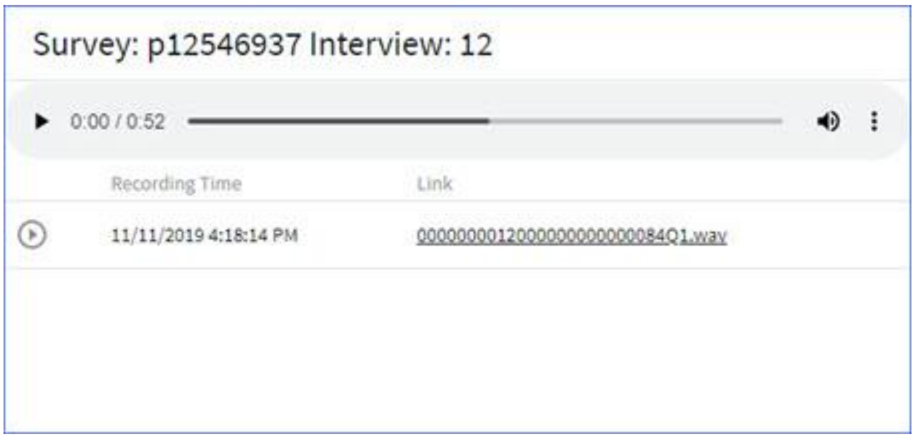


Figure 181 Playing back audio track from the recorded interview

Control the playback process using the controls in the audio player window.

- The dialog header shows the survey ID and the interview ID.
- The grid below the standard audio player control elements displays the list of files containing recorded audio tracks pertaining to the selected interview.

  Note that an interview may have more than one audio file. This indicates that the interview has first been paused and then continued. Each interview section is then stored as a separate audio file.

- The Recording Time column shows the time the recording was saved. Use the button to the left of the timestamp to start and stop the playback.
- The Link column contains a direct link to the audio file with the interview recording. Click this link to start playback of the file in your default Windows media player application.

  Right-click a link to display the standard browser context menu. Use the commands in the context menu to save the selected file locally or play it in the default audio player application.

Remember that any audio file containing an interview recording can be saved and reviewed later.

3. Click the action menu button located to the right of the playback progress bar to display the **Download** command, and click this command to download the audio file into the default location on your computer.

   The playback will stop after the audio track finishes. You can repeat playback of the same interview, or you can close the audio player window by pressing the **Close** button.

4. Repeat the procedure from step 2 to play back the audio track from another interview.

3.6.12. Exporting the Interview/call List

The list of existing interviews/calls can be exported in MS Excel format. The exported list can then be opened for viewing, or saved for later use.

The resulting file can be encrypted to restrict access to any PII data it may contain. Note that a special procedure must be performed to encrypt the file - (go to The Security Settings Section on page 453 for more information).

To export interview/call list:

1. In the Call Management window, using the State drop-down list select the interview/call state that you wish to display.

   The Export command will export only the list of interviews/calls in the selected state. To export the list of all interviews/calls existing for the current survey, select **All**.

2. Click the **Export** button on the toolbar.

   The Export page opens.

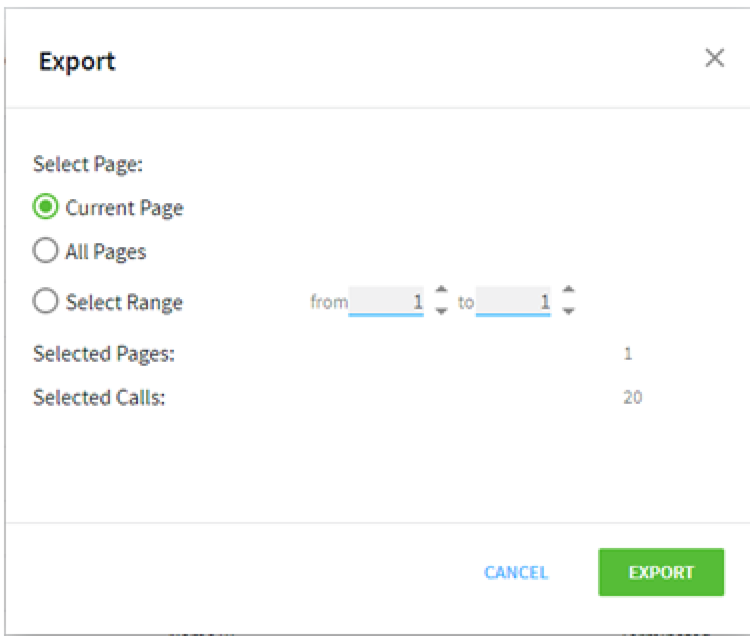


Figure 182 Exporting the interview/call list

3. If the interview/call list occupies more than one page, select the pages you wish to export.

   The number of pages and calls currently selected to be exported are indicated below the selection fields.

4. Click **Export** to start the export, or **Cancel** to close the Export dialog without exporting.

   A standard Windows save/view dialog opens - select as appropriate.

   The interview/call list is exported as a table with columns of information for all listed interviews/calls. These are Expiration Time, Time of Last Call, Appointment Time, and Appointment Expiration.

3.7. Survey Assignments

The supervisor can assign interviewers to a specific survey or allocate surveys as assignments for specific users.

You can either choose a survey (or a number of surveys) and then assign interviewers/interviewer groups to this survey, or you can choose interviewers/interviewer groups and then assign surveys to these persons/groups. Assignment procedures have no priorities - all assignments are created equal.

The CATI Supervisor module provides two ways to create assignments:

- Manage survey assignments using the Assignments tab in the Survey Properties View mode. This view mode allows you to modify person/group assignments for the current survey only. The tab allows you to add, remove and replace survey assignments.
- Assign interviewers and interviewer groups directly to the survey selected in the Survey List in the top frame. You can also replace existing assignments in the same way. These actions are available through the Add Assignments or Replace Assignments shortcut commands (go to Adding and Replacing Assignments from the List of Surveys on page 179 for more information). These procedures are performed in the same way that assignments are made or replaced on the Assignments tab in the Survey Properties View mode.

De-assign surveys or persons using the Assignments tab in the Survey Properties View mode.

Note that you can assign and de-assign surveys and replace existing assignments using the Interviewers object (for example directly from the list of the interviewers, or interviewer groups, or by changing their properties in the View mode).

3.7.1. Adding and Replacing Assignments from the List of Surveys

You can assign interviewers and interviewer groups directly to the survey that you select in the survey list in the top frame. This procedure is similar to that available on the Assignments tab of the Survey Properties view . Besides creating an assignment (or adding an assignment to the already existing assignments) you can replace the existing assignment while creating a new one. Both commands that allow adding and replacing interviewer assignments to a survey are available via the context menu for any survey displayed in the survey list.

Assignments can be added or replaced for a single selected survey only, and the procedure can only be used to add assignments to one survey at a time.

To add interviewer assignments to the selected survey:

1. Open the list of surveys in the top right frame (go to Viewing the Survey List on page 65 for more information).
2. Right-click the required survey in the list in the top right frame and choose **Add assignments** from the context menu that appears.

   The Add Assignments dialog opens.

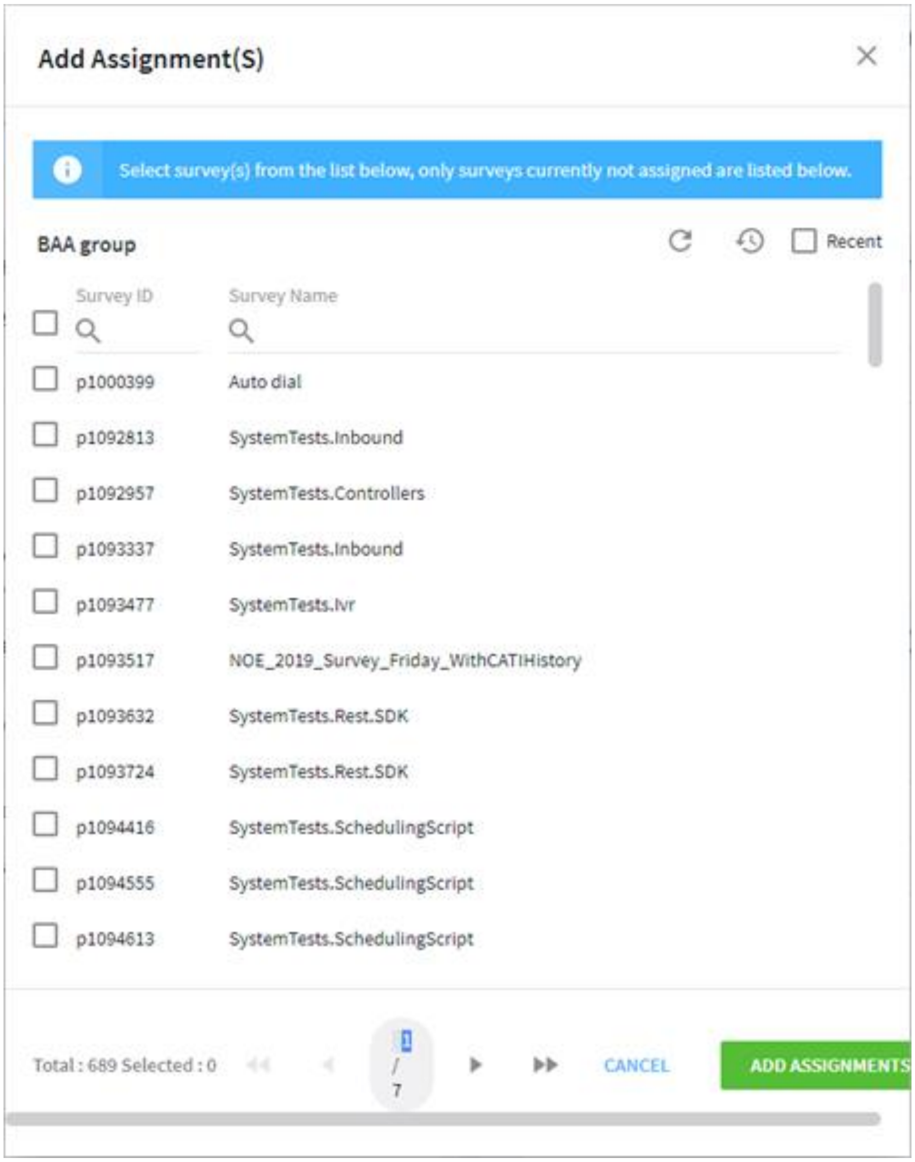


Figure 183 Selecting users and groups to assign to the survey

3. To assign an interviewer/interviewer group to the survey, select the required interviewer/interviewer group from a list of Groups and Persons.

   Note that only interviewers and interviewer groups which are not currently assigned to the selected survey are listed here. You cannot remove existing assignments using this dialog.

4. When you have selected the required users/groups, click **Add assignments** to confirm the assignment.

   The window closes and the assignment is modified.

To replace interviewer assignments for the selected survey:

Note that this procedure can only be used to replace assignments for one survey at a time.

1. Open the list of surveys in the top right frame (go to Viewing the Survey List on page 65 for more information) .
2. Right-click the required survey in the list in the top right frame and choose **Replace Assignments** from the context menu that appears.

The Replace Assignments dialog opens.

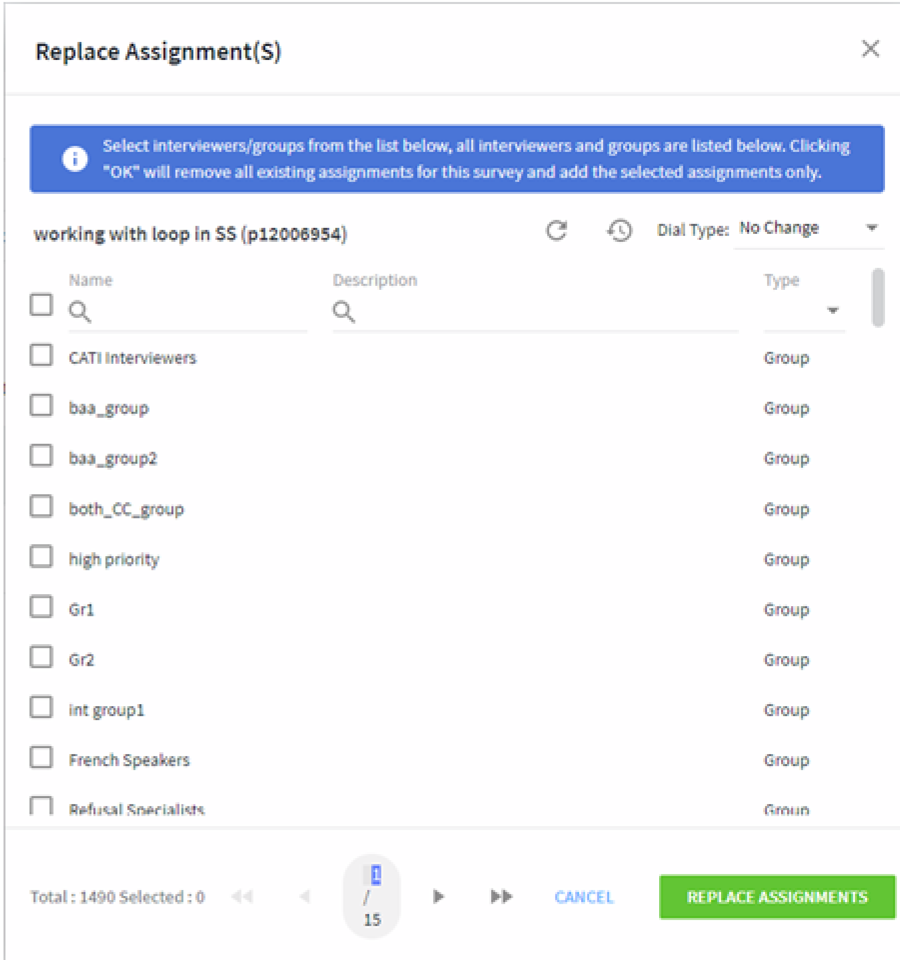


Figure 184 Replace survey assignments dialog

This window contains a list of all the persons/groups that are available to be assigned to the survey, and includes those already assigned to this survey. The table displays person/group descriptions in a separate column, and also indicates whether this item represents a person or a group.

3. Check the box in front of the required item and click **Replace assignments** at the bottom of the window to replace the assignments.

   A message is displayed asking you to confirm the replacement action.

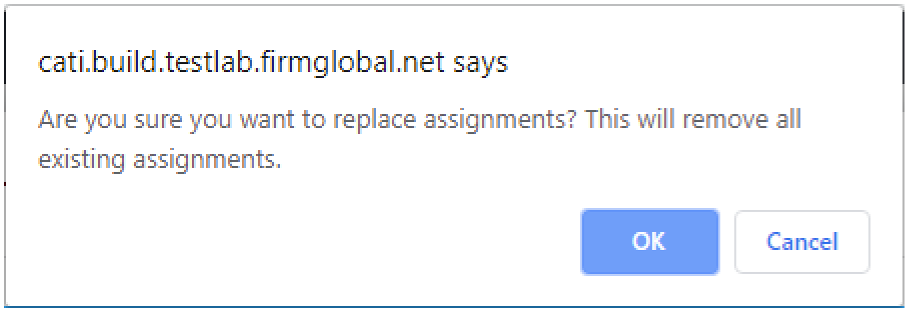


Figure 185 Warning message displayed on the attempt to execute the assignment replacement

4. Click **OK** to confirm replacement.

   Note that the specified assignment completely replaces the currently existing one. This action cannot be reverted.

   The Assignments tab refreshes, and the selected persons/groups appear in the list of the assigned person/groups in place of the previous assignment.

   Note that you can also add or replace assignments on the Assignment tab or via the similar context menu operation in the Interviewers list.

3.8. Automatic Survey Clean-up

If there is no activity in the survey data over a substantial period of time for a survey, CATI Supervisor performs an automatic clean-up procedure for that survey. The clean-up procedure includes the following actions:

- The call list for the survey is cleaned - all existing calls are removed from that list.
- The assignment list for the survey is cleaned - all existing assignments for the survey are canceled.

A survey is considered inactive, and an automatic survey clean-up is executed when all the following conditions are met simultaneously:

- The specified inactivity time period has elapsed for the survey (the period of inactivity after which the clean-up procedure is due is specified by the system administrator).
- The following activities were NOT performed for the survey during the specified period of inactivity:

  oThe survey was opened or closed.

  oA sample was loaded for the survey.

  oThe Call Management dialog for the survey was invoked.

  oAn interview was started for the survey.
- The survey is in the "Closed" state when the clean-up procedure is due.

By default the inactivity period is set to 90 days.

10 days before the specified inactivity period elapses the system notifies the survey supervisor in question by email. The notification email states that the clean-up procedure for the particular survey is due to run in 10 days.

On receiving the clean-up notification email, the supervisor can cancel the clean-up procedure by performing any of the actions listed above.

After the inactivity period has elapsed and the clean-up procedure is completed, another notification email is sent to the person supervising the survey stating that the particular survey has been cleaned on the particular date.

3.9. Exporting Call History Data

The CATI Supervisor allows call history data to be exported. This data includes a number of call properties - see the list below. This data can include calls made in the course of a single or a number of surveys.

The exported data is limited to a maximum of 1000000 call attempts and 100000 interviewer breaks.

Call history data is exported in the tab delimited format as a plain text file. This file is saved under the **CallHistoryData.txt** name and exported as an archive in ZIP format.

The resulting file can be encrypted to restrict access to any PII data it may contain (go to The Security Settings Section on page 453 for more information).

The format of the tab-delimited file is as follows:

- Date time – UTC timestamp for the time the call was finished.
- Survey ID – The Survey ID (Pxxxxx) for the survey, or "BREAK-Survey ID" survey-specific breaks, or "BREAK" for non-survey-specific breaks, or "LOGIN" and "LOGOUT" for session events.
- Survey Name - The name of the survey.
- Interview ID – The interview ID (respondent ID) for the call attempt made.
- Interviewer ID – The numeric ID of the CATI interviewer who made the call (blank for interviewer breaks).0
- Interviewer Name - The name of the CATI interviewer that made the call
- Telephone Number – The telephone number of the respondent.
- Extended Status – The numeric value of the extended status for the call outcome.
- Duration – The duration of the call made in seconds.
- Waiting time - The time spent (in seconds) waiting for the call to be delivered.
- Call Center - The name of the Call Center the exported data pertains to (this is the current Call Center indicated in the header frame (go to The Default and Current Call Centers on page 187 for more information).

Data in the file is sorted first by SurveyID and then by date/time timestamp.

To export call history data

1. Go to the Navigation menu > Survey tab and select one or a number of surveys.
2. Either right-click on a selected survey and choose **Export call history** from the context menu that appears, or click the **Export call history** button on the frame toolbar.

   The Export Call History Data page opens.

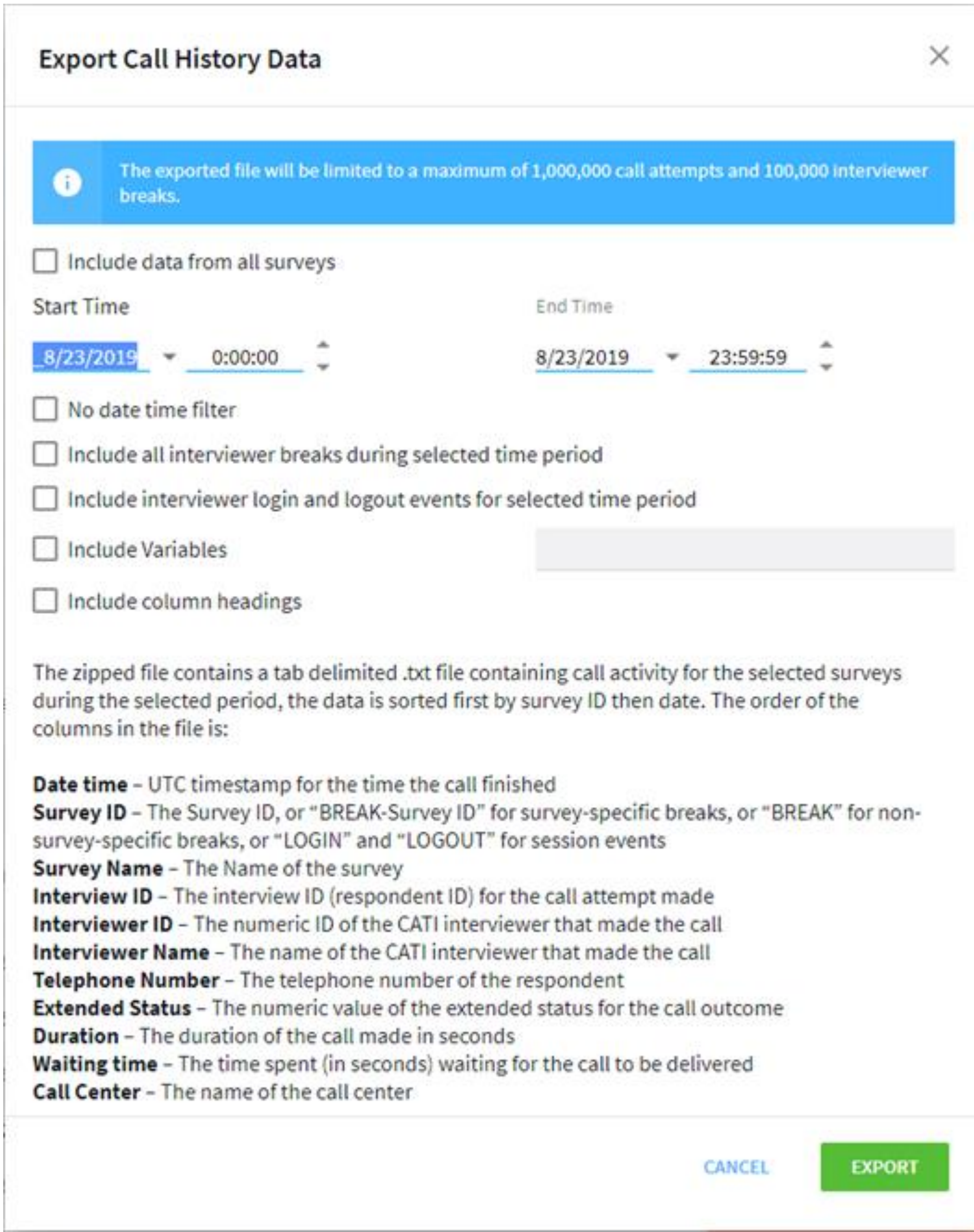


Figure 186 Selecting options for the call history data export

- You can export call history data for all selected surveys - check the Include Data From All Surveys option. Note that this option is only available for supervisors who have been granted the appropriate permission by the system administrator.
- You can export data for all calls that have been made for all the selected surveys - check the No Date Time Filter option, or you can select the desired time range using the Start Time and End Time controls.

  If you opt to select a time range, note that these dates and times are based on the local time (in the timezone which has been set as "local" in the Active Timezone List) (go to Setting the Selected Active Timezone as Local on page 389 for more information). You must then select the start/end date and time.

- You can choose whether you want the call history to include data regarding all interviewer breaks that were taken during the selected period - check the appropriate box.
- You can include all log in/log out events for the selected survey(s) - check the Include interviewer login and logout events for the selected time period option. The resulting file will include the start and end time for each type of event, and the ID of the relevant interviewer. This data is separated into groups - each survey included in the report will be followed by the selected data.
- You can include additional information on some variables. This information will be added as extra columns to the generated report. Note that you can include only variables that are marked as "Available as CATI filter" in Forsta Professional Authoring, refer to the Professional Authoring user guide for details. To include variables, check the Include Variables box and then enter the variable names in the field separated by a semicolon. If a variable you have included here is absent, the corresponding column will be created in the report but it will remain empty.

  The lower part of the dialog lists and describes the contents of the file.

3. Click **Export** to start, or **Cancel** to terminate the procedure.

   The Call history data is exported as a single archive file containing two files; an XML description file, and a tab-delimited file in plain text format that contains the data. A standard Windows dialog appears asking whether you want to open or save the file. If you choose Save you must select a path to the location where the file is to be saved. If you choose to open the file, it is opened in the archive utility (one should be installed on your machine, or the default Windows archive utility must be present). Choose the file with the TXT extension to read the call history data.

4. Call Center Management

4.1. What is a call center in CATI Supervisor

A call center in the CATI Supervisor module is a specific organizational unit which helps to divide supervisors into groups based on their tasks and to facilitate management of their work. Call centers are created within a company, and a company can hold any number of call centers. A call center is defined by the following properties:

- The call center name.
- A description.
- A link to a time zone.
- The ID of the dialer which is assigned to the call center.

A call center is a form of virtual container which holds a range of objects, and it is used to organize work in CATI Supervisor by creating a separate logical unit including supervisors, surveys and related interviewers. A call center will need the following information:

- A list of supervisors who are assigned to work in this call center.
- A list of surveys activated in this call center.
- A list of interviewers created for this call center.

A call center is configured by adding surveys to it and assigning supervisors to work with those surveys. Supervisors then add interviewers who in turn conduct interviews for each survey. When a call center is configured, the following rules apply:

- Each supervisor can be assigned to one call center.
- Any number of supervisors can be assigned to work in a single call center.
- A survey can be activated in any number of call centers.
- An interviewer can be created in one call center, and an interviewer's name must be unique across the CATI Supervisor system.

Call centers are managed by supervisors who are granted extended management rights by the company. Such supervisors are called "administrator" supervisors: they are entitled to manage the work of subordinate ("normal") supervisors. A "Normal" supervisor's task is to organize the work of the interviewers and manage the surveys they are given permission to work with. The "administrator" supervisor prepares the basis for this work: they create call centers, and assign surveys and supervisors to the call centers. An "administrator" supervisor can carry out a "normal" supervisor's duties when required.

"Normal" and "administrator" supervisors have different access rights to objects which are used in the CATI Supervisor module. An "administrator" supervisor can monitor and access each object existing in the system; a "normal" supervisor has access only to objects which are related to surveys and interviewers he/she currently works with. Other objects are hidden from them. Some objects are accessible to all supervisors regardless of which call center they currently belong to and what access permissions they have.

To simplify a "normal" supervisor's work, certain object lists are either filtered by call center ID, or these lists present only data relevant to the currently logged in supervisor. This means a "normal" supervisor can see and access only objects relevant to the call center they are currently working for.

Objects available to a "normal" supervisor are listed below with their filtering option (whether each object is filtered by call center ID):

- Surveys - filtered by call center ID.
- Interviewers - filtered by call center ID.
- Interviewer groups - not filtered by call center ID (all interviewer groups existing in the company are visible, but those created for other call centers appear empty).

- Call management lists (different views available in the Call Management dialogue window (go to Call Management on page 117 for more information) - not filtered by call center ID (all interviews/calls in all states are available. Creating a special filter to separate certain call center related items may be useful).
- Reports - these are generated based on data filtered by call center ID, so they are relevant to the current call center only.
- Recorded interviews - are NOT filtered. All recorded interviews are available. The list can be filtered manually by applying a filter in the corresponding column in the table (go to Live Call Monitoring, Recordings and Playback in CATI Supervisor on page 324 for more information)
- Scheduling scripts - not filtered. All scheduling scripts created for the current company are available to all supervisors working for that company.
- Filters (survey specific) - filtering is not required because only the assigned surveys are available, and the filters displayed for each survey are the filters that are used exclusively with this survey.
- Filters (site specific) - filtered by call center ID. Only those available for surveys activated in a specific call center can be accessed.
- Activity views - filtered by call center ID.

Note that some surveys along with related properties and attributes may be unavailable when the appropriate permission is not granted to the supervisor. These surveys will then be hidden although they belong to the same call center as the supervisor. Data relevant to such "hidden" surveys will not be used for generating reports and activity views.

4.1.1. The Default and Current Call Centers

Every company will always have a "Default" call center; it is created for each company automatically by the system. This call center is used by default for any related operations when no other call center has yet been created. By default, all surveys are activated in and all supervisors are assigned to this default call center. Surveys and supervisors can later be activated and assigned to other call centers as required.

The default call center cannot be redefined (you cannot set another call center to act as the default) or deleted, although its properties can be edited. You can rename the default center, change its description, or change the time zone defined for it. Other call centers can be added to the system as required.

When a supervisor is assigned to a call center other than the default, that new call center (the Current) then becomes the default for that supervisor. The Current call center is the call center to which the currently logged in supervisor is assigned.

The actions that are performed by default in the Current call center are:

- Adding an interviewer to the system.
- Activating a survey when it is launched in the Professional Authoring module.
- Assigning a supervisor to the survey.

The Current call center for the logged in supervisor is indicated by the blue rectangle in the Forsta Plus toolbar (see below).

Figure 187 The Forsta Plus toolbar displaying the current call center name

The Default call center is therefore always present in the system, and it acts as current until the supervisor is assigned to another call center, which then becomes the Current (and therefore the default) call center for them.

Note that operations with call centers are only available to and can be performed by the "administrator" supervisors. "Normal" supervisors have no access to the call center object and therefore cannot change the call center assignment. "Normal" supervisors can only work in a single call center, and it is always considered as the Current one for them.

4.2. Managing a Call Center

The CATI supervisor "administrator" is responsible for managing Call Centers. They arrange "normal" supervisors in separate groups and assign surveys to these groups.

A separate group of supervisors working with a group of surveys is referred to as a "Call Center" in the CATI Supervisor module. To manage Call Centers the "administrator" supervisor is granted the right to perform the following tasks:

- Create and edit Call Centers (go to Creating and Editing a Call Center on page 192 for more information).
- Delete Call Centers (go to Deleting a Call Center on page 194 for more information)
- Activate surveys in particular Call Centers (go to Activating Surveys in Call Centers on page 196 for more information)
- Assign supervisors to particular Call Center (go to Managing Supervisors on page 190 for more information).

Note that the "normal" and "administrator" supervisor rights are granted in the Forsta Professional Authoring module. Refer to the Professional Authoring user guide for details.

4.2.1. Viewing the List of Call Centers

To view the Call Center list:

1. Either click on the Call Centers tab in the left Navigation menu to open the menu and select **Call Centers**, or click the blue **Call Center** button on the Forsta Plus toolbar.

   The list of all currently existing Call Centers opens in the top frame of the CATI Supervisor main window.

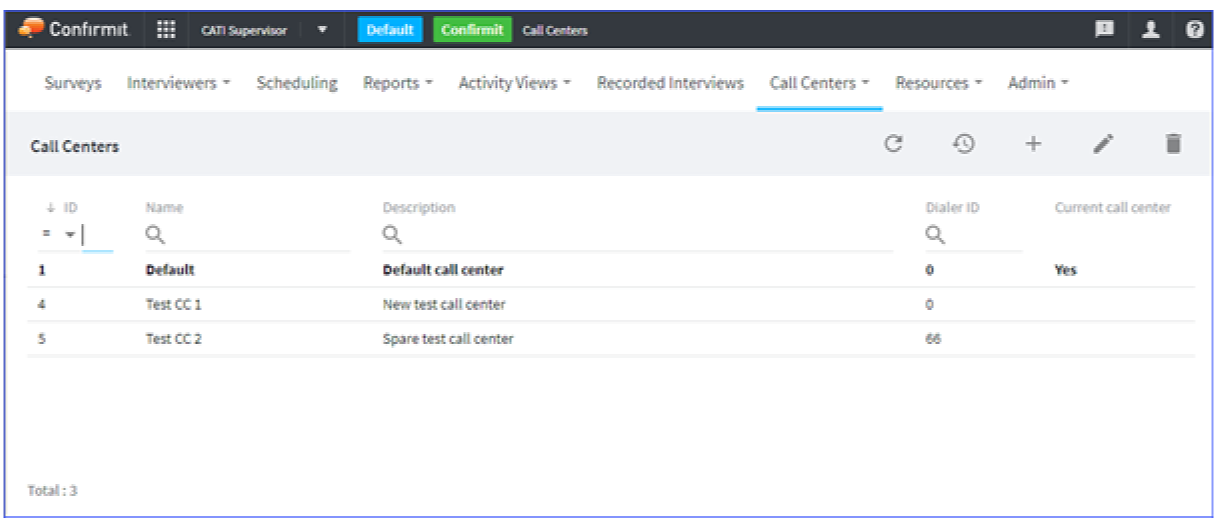


Figure 188 The list of Call Centers displayed in the top frame

You can perform the following operations with Call Centers:

- Create and edit Call Centers (go to Creating and Editing a Call Center on page 192 for more information).
- Delete Call Centers (go to Deleting a Call Center on page 194 for more information).
- Activate (go to Activating Surveys in Call Centers on page 196 for more information) and deactivate (go to Deactivating Surveys on page 198 for more information) surveys in Call Centers .

- Assign supervisors to particular Call Center (go to Managing Supervisors on page 190 for more information).

  Operations are performed by either choosing commands from the shortcut menu (activated by right-clicking the grid row containing the appropriate Call Center), or by pressing buttons on the toolbar in the top right frame (the toolbar is located in the frame's title bar).

  When the top frame displays the list of Call Centers its toolbar contains the following object specific button set.

Button	Description	Function
	REFRESH	Updates the Call Center list.
	CLEAR SELECTION	Deselects all the currently selected Call Centers.
	NEW	Displays the New Call Center dialog so you can create a new Call Center.
	PROPERTIES	Displays the Call Center Properties dialog and so you can edit the Call Center properties.
	DELETE	Displays the Delete Call Center dialog so you can delete the selected Call Centers.

4.2.2. Viewing the List of Activated Surveys

Activate or deactivate a survey from the list of activated surveys:

1. Click on the Call Center tab in the left Navigation menu.

   The Call Center object menu opens.

2. Go to the Surveys tab.

   The list of all currently activated surveys is displayed in the top right frame.

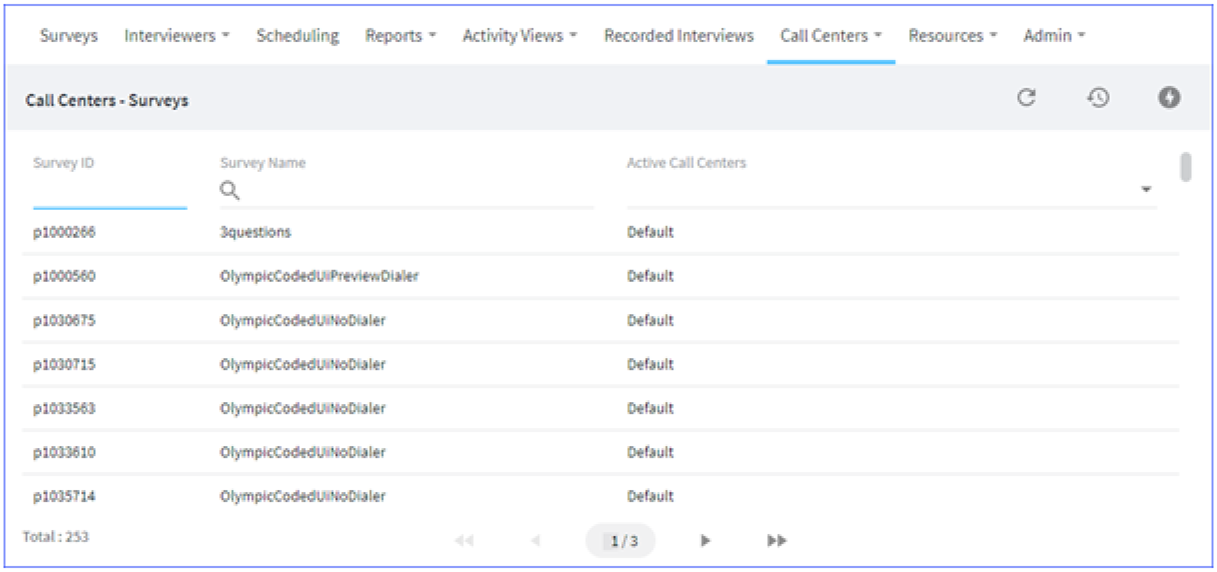


Figure 189 Viewing the list of surveys activated in the current Call Center

You can perform the following operations with activated surveys:

- Activate the selected survey in the call center (or in a number of call centers) (go to Activating Surveys in Call Centers on page 196 for more information)
- Deactivate the selected survey in the call center (or in a number of call centers) (go to Deactivating Surveys on page 198 for more information).
- Perform operations either by choosing commands from the shortcut menu (activated by right-clicking the required activated survey in the list), or by clicking buttons on the toolbar in the top right frame.

  When the top right frame displays the list of Call Centers, its toolbar contains the following object specific button set.

Button	Description	Function
	REFRESH	Updates the activated surveys list.
	CLEAR SELECTION	Deselects all currently selected surveys.
	ACTIVATE IN CALL CENTERS	Displays the Activate in Call Centers dialog so you can activate and deactivate the selected survey.

4.2.3. Managing Supervisors

The "administrator" supervisor can view the list of all supervisors who belong to the same company as the "administrator" and who were granted the right to work with the CATI Supervisor module. Note that access is controlled via the Forsta Professional Authoring module - refer to the Professional Authoring user guide for details.

The administrator supervisor can organize "normal" supervisors' work by assigning them to call centers. When a normal supervisor logs in to the CATI Supervisor module they start in the call center to which they were assigned using the procedure below. This rule has only one exception: when a supervisor is granted the right to work with the CATI Supervisor module, they are automatically assigned to the default call center. They can later be assigned to another call center using the procedure below.

Assigning a supervisor to a call center:

1. Go to the Call Center navigation menu (CATI Supervisor application left frame) > Supervisors tab.

   The list of supervisors opens in the top frame of the CATI Supervisor application window.

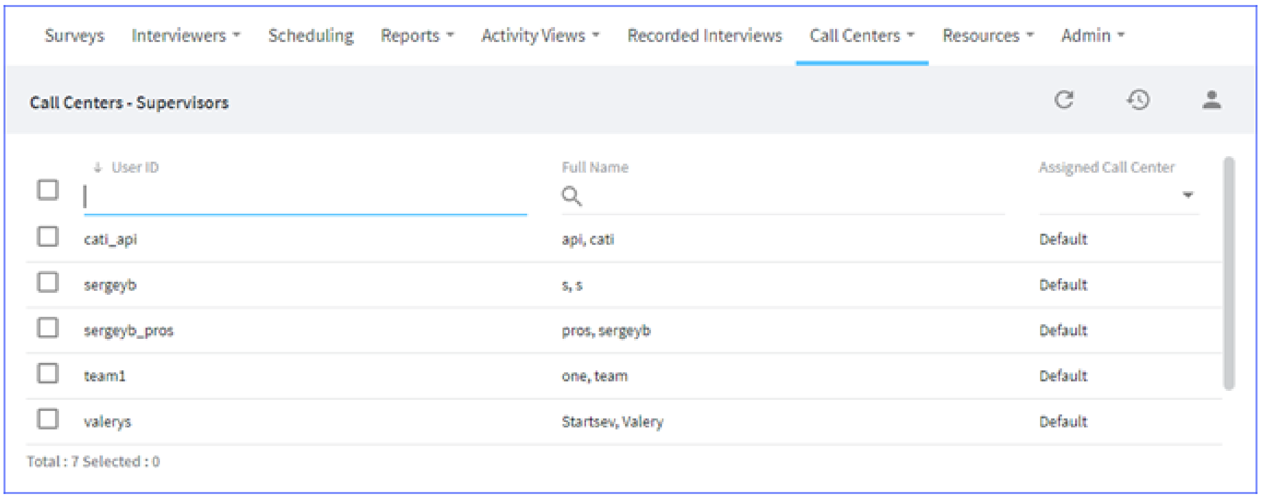
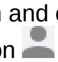


Figure 190 Browsing the supervisor list

   This list displays the User ID (used for logging into the system), the user's full name (used to register the supervisor in the system), and the name of the assigned call center (the CURRENT call center for supervisor).

2. Select one or more supervisors in the list by checking the boxes next to their names.
3. Either right-click the selection and choose **Assign Supervisor** from the context menu that appears, or click the **Assign Supervisor** button  on the frame toolbar.

   The Assign Supervisor page opens.

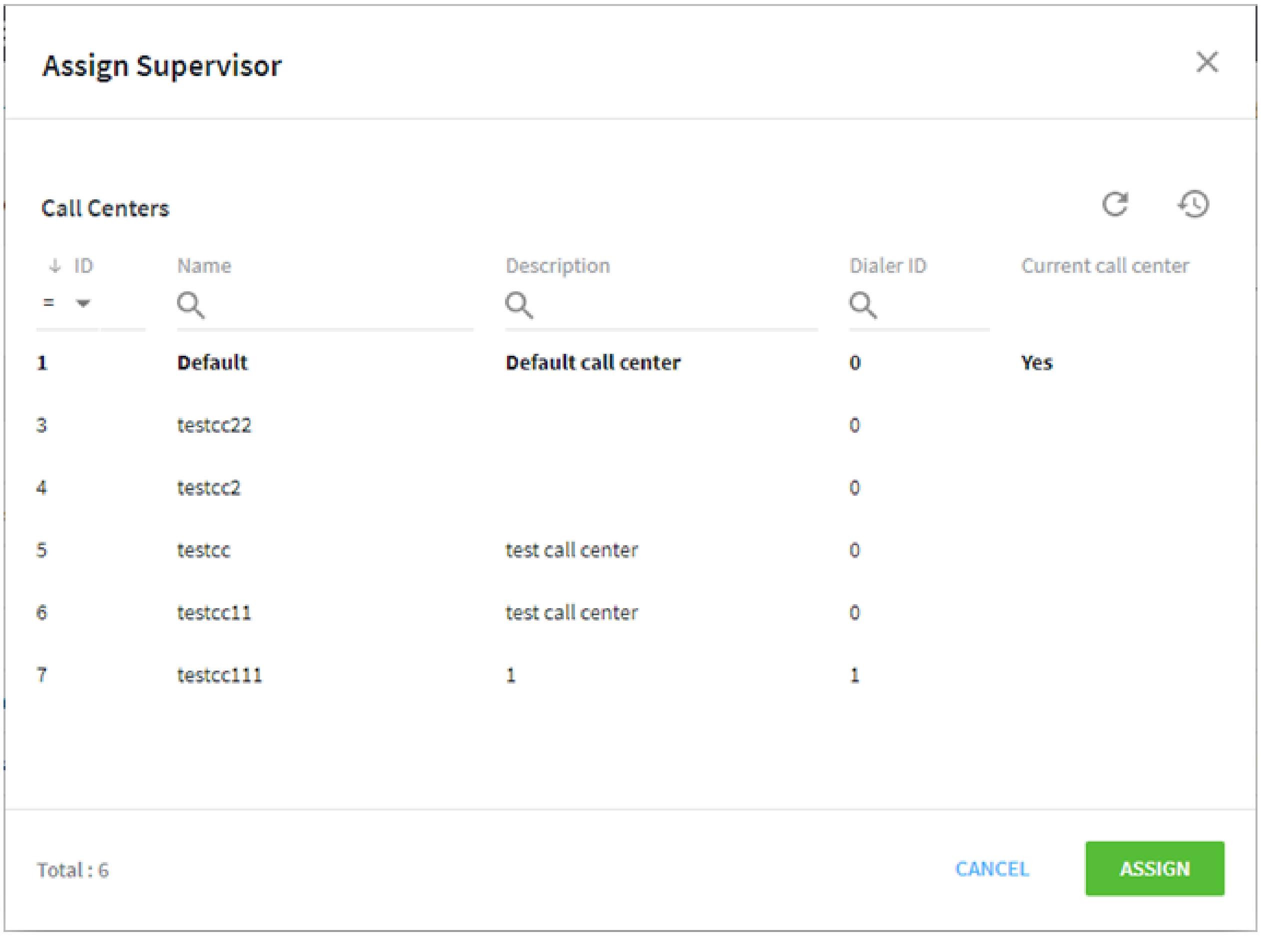


Figure 191 Assigning a supervisor to a call center

The window displays the list of call centers to which you can assign the selected supervisors. Only one call center can be chosen at a time.

Note that when you select a new call center, the call center to which the supervisor was assigned (or each call center in the event you have selected a group of supervisors) will be substituted with the selected call center. A supervisor can be assigned to only one call center at a time. The call center to which the supervisor is assigned becomes the CURRENT call center for that supervisor.

4. Click **Assign** to complete the action. The name of the assigned (CURRENT) call center will change as required for each supervisor selected for the action.

4.2.4. Creating and Editing a Call Center

You can create any number of new call centers in addition to the default call center (go to The Default and Current Call Centers on page 187 for more information), and you can edit or delete any created Call Center.

To create a Call Center:

1. Go to the Call Centers tab.

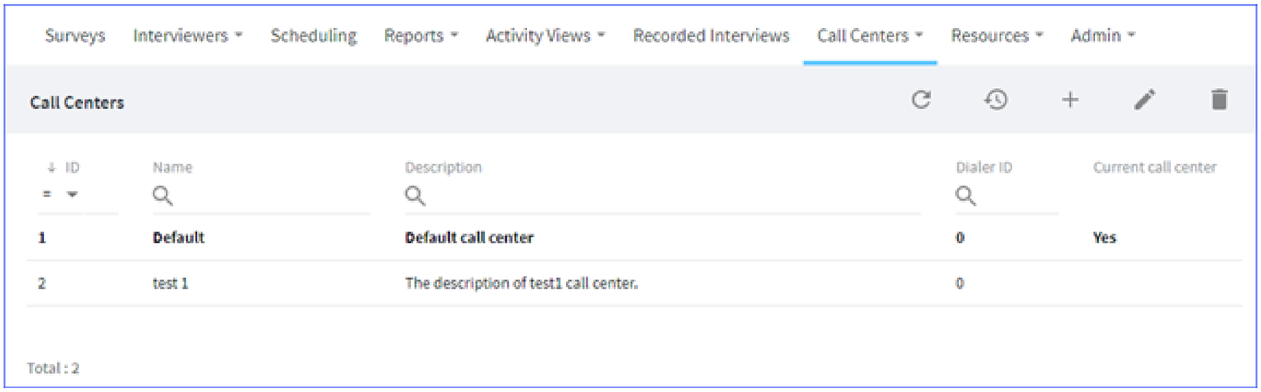


Figure 192 The list of Call Centers displayed in the top frame

2. Click the **New** button on the frame toolbar, or right-click anywhere in the list and choose **New** from the context menu that appears.

   The New Call Center overlay opens.

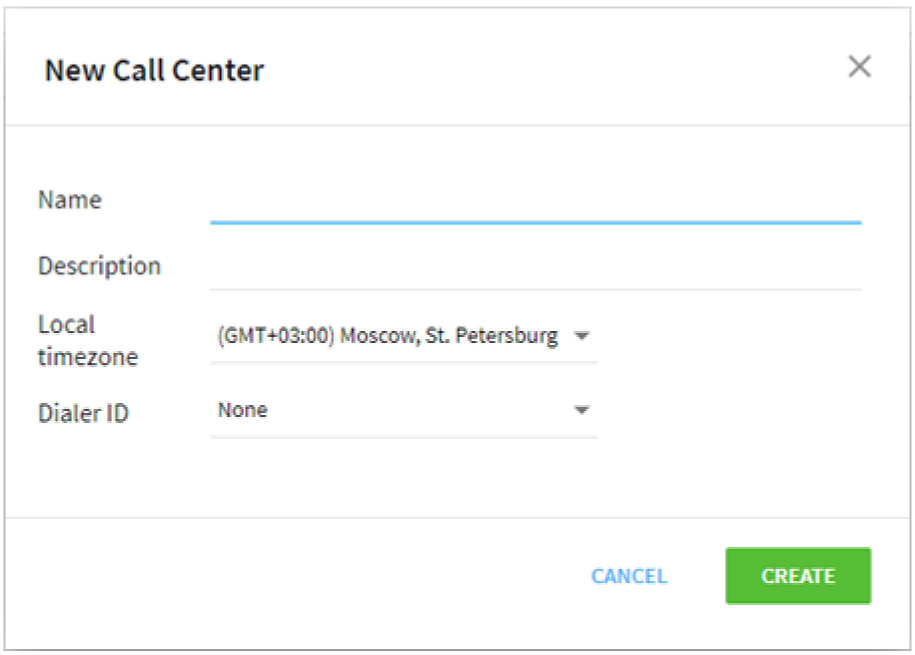


Figure 193 The New Call Center dialog

3. Fill in the Name and Description fields.

   The Name is mandatory and must be unique across the system, while the Description is optional.

4. Choose the timezone which is to be considered as local for this Call Center, or accept the default value which is the GMT timezone.

5. From the Dialer ID drop-down list choose the ID of the dialer that will be used to make calls automatically for surveys assigned to that call center.

Note that the dialer will not be used for surveys for which the Dial Mode is set to "Manual" in the Professional Authoring module. You can also choose "None" in this field, meaning that a dialer will not be used for this call center. When "None" is selected, the Dialer ID value shown in the Dialer ID column in the Call Center list will be "0".

6. Click **Create** to create the new call center, or **Cancel** to close the window without creating a Call Center.

   The newly created Call Center is assigned an ID and displayed in the Call Center list.

To edit a Call Center:

1. Go to the Call Centers tab.
2. Right-click on the Call Center you want to edit and choose **Properties** from the context menu that appears, or click the **Properties** button on the frame toolbar.

   The Call Center Properties dialog opens.

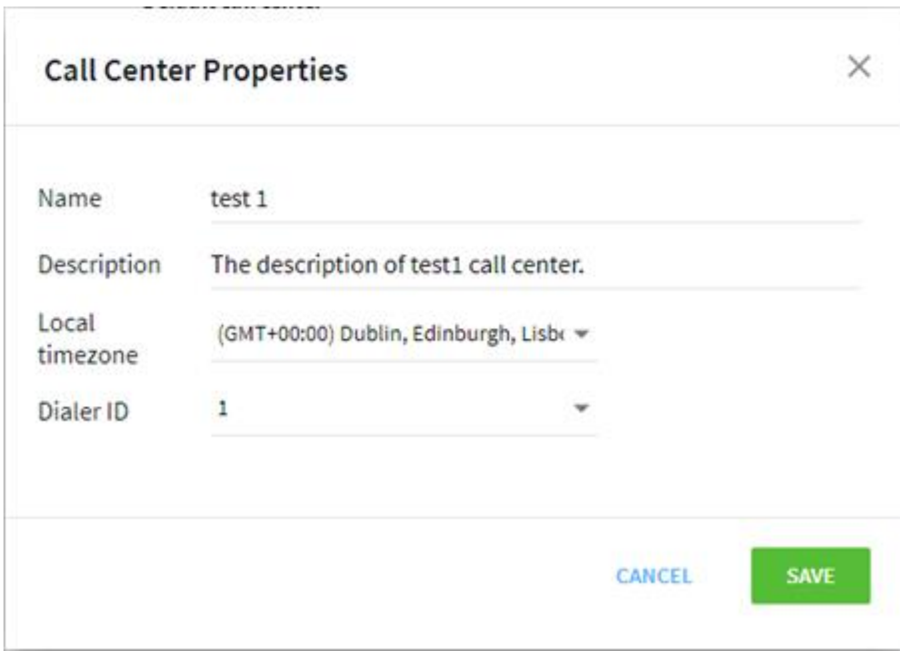


Figure 194 Call Center Properties dialog

3. Edit the Name, Description timezone and Dialer ID as required.

   The name is mandatory and must be unique across the system, while the description is optional.

Note: If you attempt to change the Dialer ID while an interviewer belonging to that Call Center is logged in, the system will cancel the operation and display a warning message. Ensure all interviewers who work in the Call Center are logged out before you change the Dialer ID.

4. Click **Save** to save the edited properties or **Cancel** to close the window without editing the Call Center.

4.2.5. Deleting a Call Center

Any Call Center except the default can be deleted at any time.

A call center will normally have some activated surveys, a number of supervisors assigned to the center, and interviewers that were added by the supervisors. When the deletion action is initiated the system prompts you to choose what is to be done with these entities. Interviewers can be either deleted or transferred to another call center, while surveys and supervisors are always moved to another call center.

Note that even if you choose to move interviewers to a new call center along with the surveys, interviewer and interviewer group assignments to surveys and any statistics regarding the interviewers work will be deleted. All previous tasks and results will be reset, and interviewers will appear in the call center as freshly added.

A Call Center cannot be un-deleted - exercise caution when performing this operation.

To delete a call center:

1. Go to the Call Centers tab in the left Navigation menu.

   The Call Centers menu opens. The **Call Center**s option is selected by default. If it is not selected, click it. The list of currently existing Call Centers is displayed.

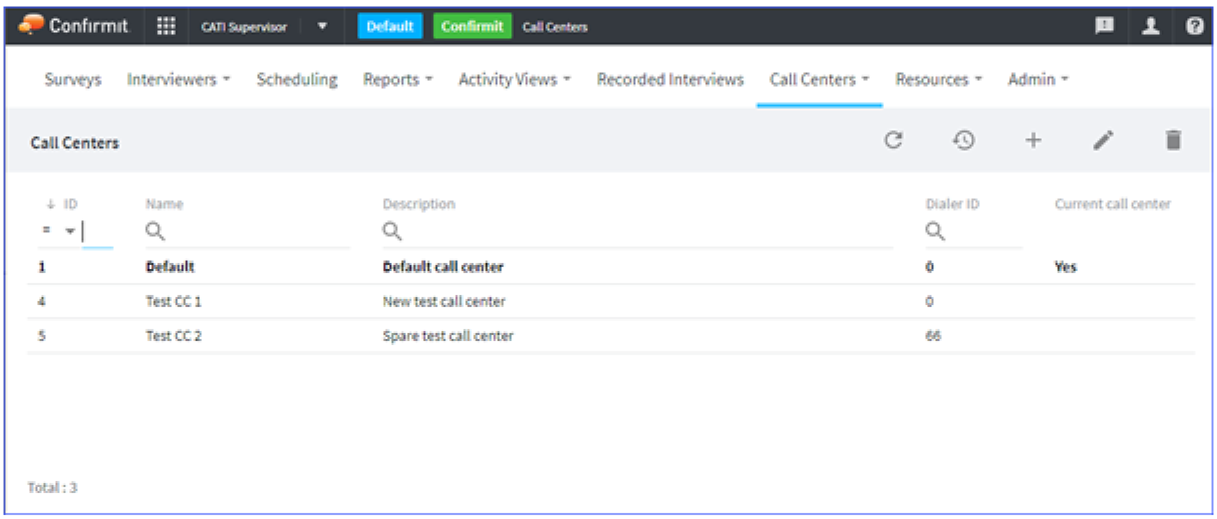


Figure 195 Displaying the list of call centers

2. Choose the call center you want to delete and either right-click on it and choose **Delete** from the context menu that appears, or click the **Delete** button on the frame toolbar.

   The Delete Call Center dialog opens.

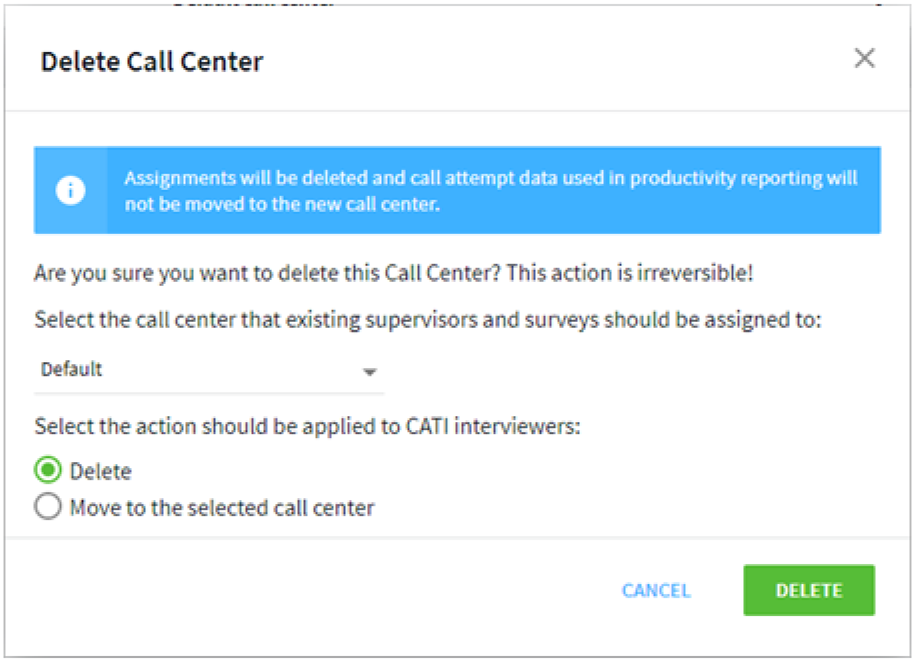


Figure 196 Configuring the deletion of a call center

In the drop-down list select the call center to which any supervisors and surveys will be moved to. Surveys will be activated automatically in that call center, and supervisors will be assigned automatically to that call center as the result of this operation.

3. Decide what is to be done with any interviewers currently existing in the call center you are about to delete.

   You can choose to delete all these interviewers, or move them to the call center you selected in the drop-down list above as the target for supervisors and surveys. Remember that interviewer assignments and statistics accumulated in the course of work in the deleted call center will not be retained for these interviewers in either case.

4. Click **Delete** to proceed with call center deletion, or click **Cancel** to cancel the operation.

4.3. Activating Surveys in Call Centers

The "Supervisor administrator" makes a survey accessible to "normal" supervisors when he/she activates this survey in a call center. The activated survey will then be available only for supervisors who are assigned to work with this call center.

A survey is automatically activated when it is launched in the Forsta Professional Authoring module in the CATI mode - refer to the Professional Authoring user guide for details. The launched survey is normally activated in the currently active (Current) call center (go to The Default and Current Call Centers on page 187 for more information). The Current call center is the call center that the currently logged-in supervisor is assigned to, and is indicated in the top frame of the CATI Supervisor module.

Any number of surveys can be activated within a single call center, and a survey can be activated in any number of call centers. Only one survey can be activated at a time.

A survey can be activated in a call center regardless of whether it is currently open or closed. The activation procedure does not change the survey's open or closed state - it will remain in the state it was in before it was activated. Note that you can combine the activation and deactivation actions in one procedure.

To activate a survey in one or a number of call centers:

1. In the Navigation menu, go to the **Call Centers > Surveys** menu item.

   The list of surveys activated in all available call centers is displayed.

2. Choose the survey you want to activate and either right-click on it and choose **Activate in Call Centers** from the context menu that appears, or click the **Activate in Call Centers** button on the toolbar.

   Note that you can search for a survey; type search criteria into the field at the top of a column.

   The Activate in Call Centers dialog opens.

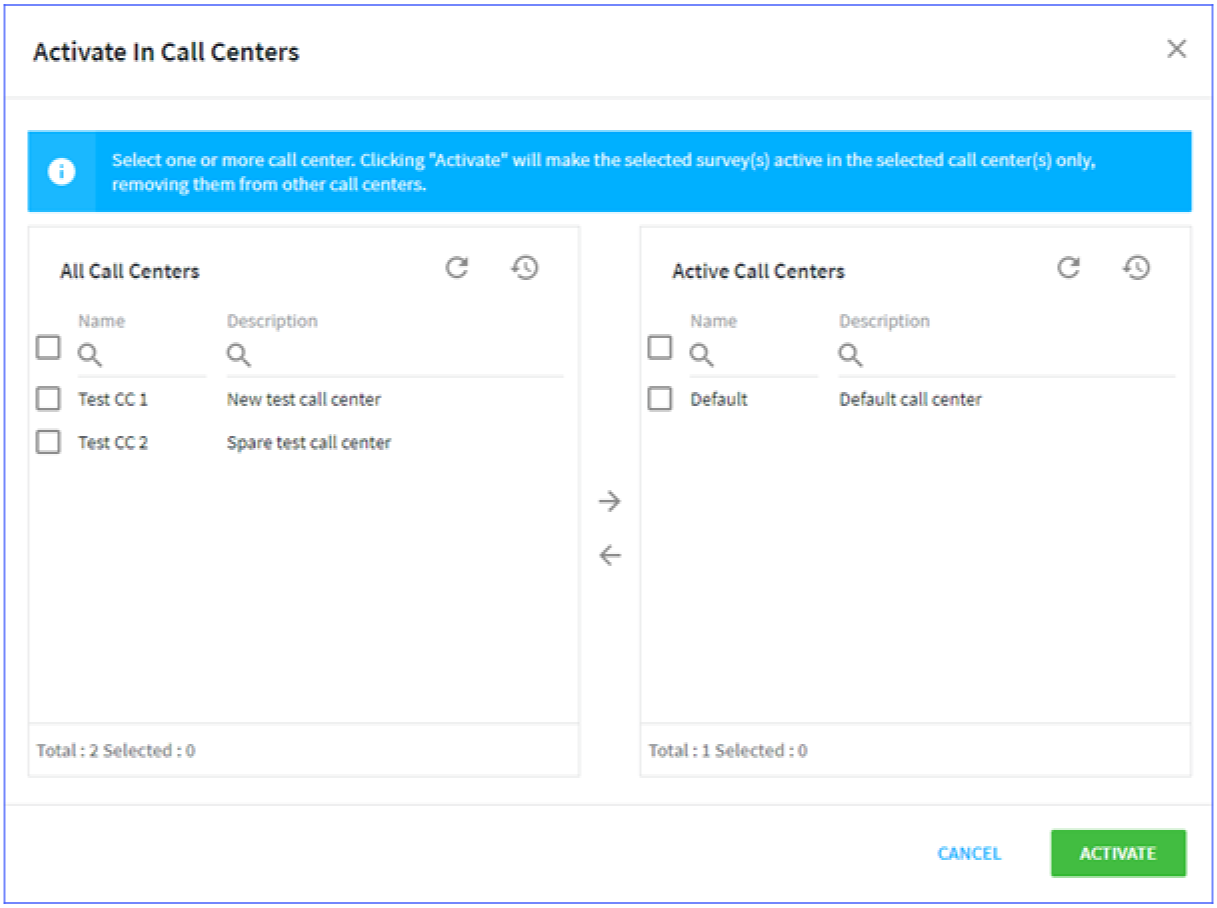


Figure 197 Activating survey in a Call Center

   The list of all call centers in which you can activate the selected survey is displayed in the left frame (All Call Centers), while the list of call centers in which the survey is already activated is displayed in the right frame (Active Call Centers).

3. Choose one or more call centers in the left frame by checking the boxes next to their names.
4. When you have selected the required call centers, click the right-arrow button.

   The selected surveys are moved into the right frame. Remember that surveys are activated only in the currently active Call Center. This is normally the call center which the currently logged-in supervisor is assigned to.

5. To confirm your choice and activate the chosen surveys click the **Activate** button.

You can combine the activating and deactivating actions for several call centers in one procedure - sort the call centers into the desired frames, then click **Activate**.

4.4. Deactivating Surveys

An activated survey is available for conducting interviews in the call centers in which it has been activated (go to Activating Surveys in Call Centers on page 196 for more information).

The "Supervisor administrator" can make a survey unavailable in a call center in which it is activated, by deactivating it. A survey which is deactivated in a call center becomes invisible for "normal" supervisors who work in this call center. The deactivation procedure is performed for specific call centers. Only one survey can be deactivated at a time. Deactivating a survey does not change the survey's state - open surveys remain open and closed surveys remain closed.

Note that you should not deactivate a survey while an interviewer is working with it.

You can combine the activating and deactivating actions in one procedure - see the instruction below.

To deactivate a survey in one or more call centers:

1. Go to the **Call Centers > Surveys** menu item.

   The list of surveys activated in all available call centers is displayed.

2. Choose the survey you want to deactivate and either right-click on it and choose **Activate in Call Centers** from the context menu that appears, or click the **Activate in Call Centers** button  on the toolbar.

   The Activate in Call Centers dialog opens.

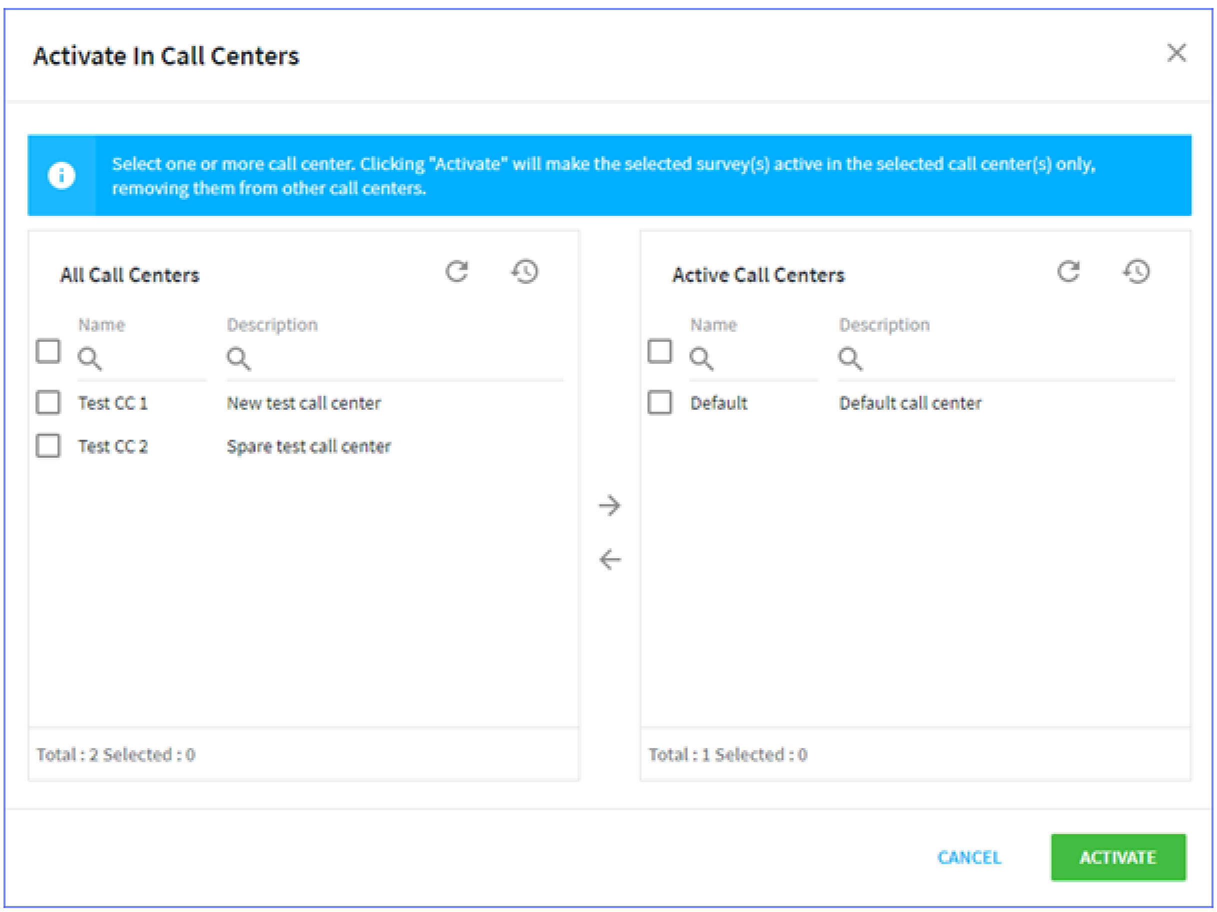


Figure 198 Deactivating survey in a Call Center

The list of all call centers in which the selected survey is not currently activated is displayed in the left frame (All Call Centers), while the list of call centers in which the survey is already activated is displayed in the right frame (Active Call Centers).

3. Choose in the right frame (Active Call Centers) the call center(s) you wish to deactivate the survey for, by checking the boxes next to their names.
4. Click the left-arrow button between the frames.

   The checked surveys are moved from the right frame to the left frame.
5. Click the **Activate** button to confirm your choice and deactivate the selected survey(s).

   The survey is deactivated and the window closes. If the survey you wish to deactivate is currently in use (an interviewer is logged in) a warning message will be displayed.

You can combine the activating and deactivating actions for several call centers in one procedure - sort the call centers into the desired frames, then click **Activate**.

5. Scheduling Scripts

A scheduling script is a set of rules which contain instructions. They describe what the CATI Supervisor module is to do with a specific call and under which conditions.

You can create and add a number of scheduling scripts to the CATI Supervisor module. All these scripts will be available company-wide, and they can be used with any survey that is conducted by the company. One scheduling script can be used with a number of surveys, but each survey can use only one scheduling script.

A scheduling script will normally be selected as a survey property. This is done after the survey is launched in the CATI mode and then added to the Survey list in the CATI Supervisor (go to Viewing and Modifying a Survey's General Properties on page 68 for more information). The default scheduling script is set automatically when the survey is added to the CATI system. You can choose another scheduling script any time later when you modify the survey properties.

A Scheduling Script is made up of a number of rules which are applied to all calls that are created for a survey. Scheduling scripts use a number of parameters, some of which are predefined, and some can be configured, saved and reused in any scheduling script.

Interviews are run through the survey's assigned scheduling script only in the following situations:

- A call ends in the CATI Interviewer Console.
- A call is rescheduled in the CATI Supervisor's Call Management.
- A sample is added via the Respondent Upload (in Professional Authoring) in the 'Full Scheduling' mode.
- A Data Processing Rule is executed on the survey's Respondent Data with the 'Full Scheduling' mode enabled. If the DP Rule executes in the Update Data mode then it will only execute a scheduling rule with the 'Only execute during sample update' setting enabled – see the Data Processing user guide for more information).

A scheduling script can include rules, sub-rules and actions. Any rule in a scheduling script acts like a container which groups a number of sub-rules. This helps to maintain the order in which rules and sub-rules are executed, and makes sub-rule management more convenient. A sub-rule in its turn specifies conditions, and lists actions that are to be performed when these conditions are satisfied. A scheduling script consists of:

- **Shift types** - types of shifts used in the scheduling scripts.
- **Shifts** – describe interviewing hours during a week (based on the shift type).
- **Rules** – a list of sub-rules.
- **Sub-rules** – describe filters (conditions) and actions which should be performed when a condition is satisfied.
- **Actions** - describe actions which are to be performed for a call, and contain a set of filters (conditions) defining which call this action can be applied to.
- **Time Zones** – a set of time zones that are used in the scheduling script.
- **Custom script** (optional) – custom script can be used to perform specific actions not available via the user interface.

Scheduling scripts are saved to a database and stored as XML descriptions. Saved scripts can be edited or deleted at any time, and can be exported and imported in XML format.

5.1. Viewing the List of Scheduling Scripts

To view the list of the Scheduling Scripts:

1. In the Navigation frame go to the Scheduling tab.

   The list of currently available Scheduling scripts opens.

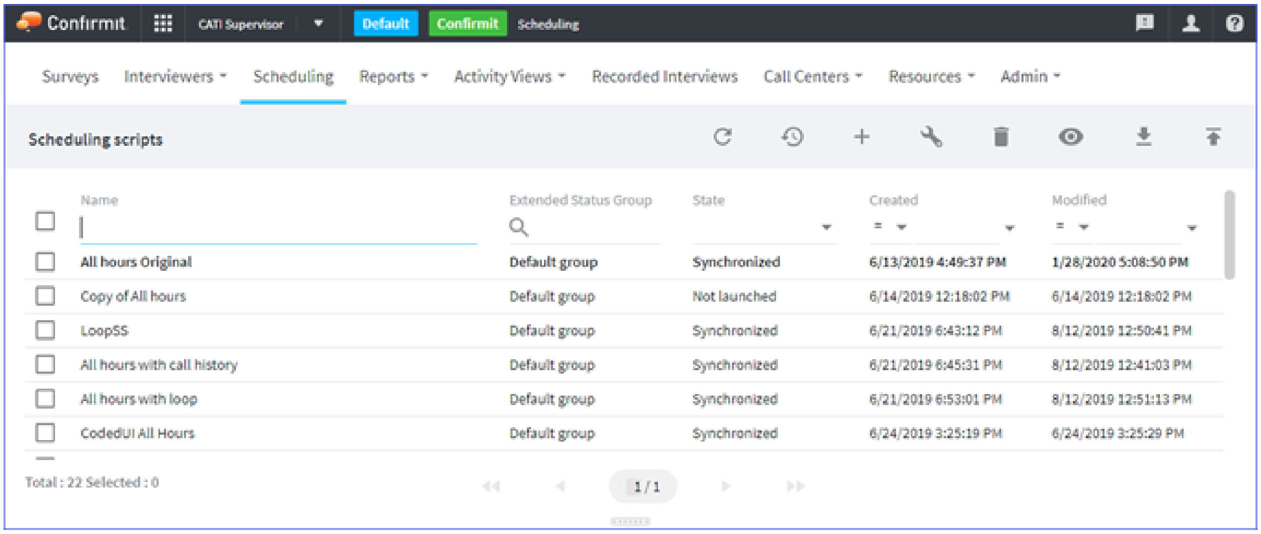


Figure 199 The Scheduling Script list

All the listed scheduling scripts are available company-wide and can be used with any survey that is run by the company. The following script properties are displayed in the table columns:

- Name (the name of the script).
- State (current state of the script, see explanation below).
- Created (the creation date and time).
- Modified (last modification date and time).

The list shows the current state of each script in the "State" column. This can have the following values:

- **Not launched -** the scheduling script has not been launched as yet.
- **Pending synchronization -** changes have been made to the script since the last synchronization.
- **Synchronized -** the script definition is synchronized with the launched version.

You can perform the following operations on the scheduling scripts you select in this list:

- View and modify the scheduling script settings.
- Edit the scheduling script properties.
- Copy properties of an existing scheduling script to the default scheduling script.
- Create/delete a new scheduling script.
- Export scheduling script definitions.
- Import scheduling script definitions.

You perform operations by either choosing commands from the shortcut menu (activated by right-clicking the grid row containing the appropriate survey), or by clicking buttons on the toolbar. The toolbar shows the following object-specific button set:

Button	Description	Function
	REFRESH	Updates the scheduling script list.

	CLEAR SELECTION	Deselects all currently selected scheduling scripts.
	NEW SCRIPT	Creates a new scheduling script.
	PROPERTIES	Displays the Script Properties dialog so you can edit the scheduling script properties.
	DELETE	Deletes all selected scheduling scripts.
	VIEW	Displays the scheduling script settings in the bottom frame so they can be modified.
	EXPORT HISTORY LIST	Exports the definitions of the selected scheduling scripts in XML format.
	IMPORT	Imports a description of a scheduling script in XML format.

5.2. Creating a New Scheduling Script

1. Either right-click any row in the Scheduling Script list and choose **New Script** from the context menu, or click the **New** button + in the toolbar

   The New Script page opens.

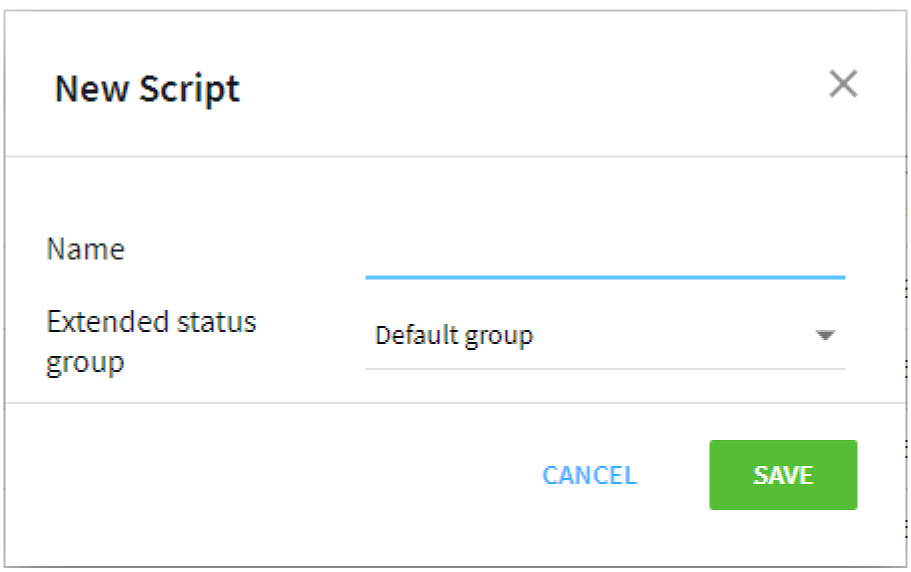


Figure 200 The New Script page

2. Type a name for your script into the Name field.
3. Choose an extended status group to be used with the scheduling script.

   You can select one from the list of available extended status groups (go to Configuring the Extended Status Groups on page 335 for more information)r you can leave the Default group.

4. Click **Save** to add the new scheduling script to the list.

The scheduling script you have created must now be configured (go to Modifying Scheduling Script Settings on page 204 for more information).

5.3. Modifying a Scheduling Script's Properties

For a scheduling script you can modify the following properties:

- The scheduling script name.
- The name of the extended status group that is currently used with this script.

To modify a scheduling script's properties:

1. Either right-click the script and choose **Properties** from the shortcut menu, or select the required script in the list and click the **Properties** button  on the toolbar.

   The Script Properties page opens.

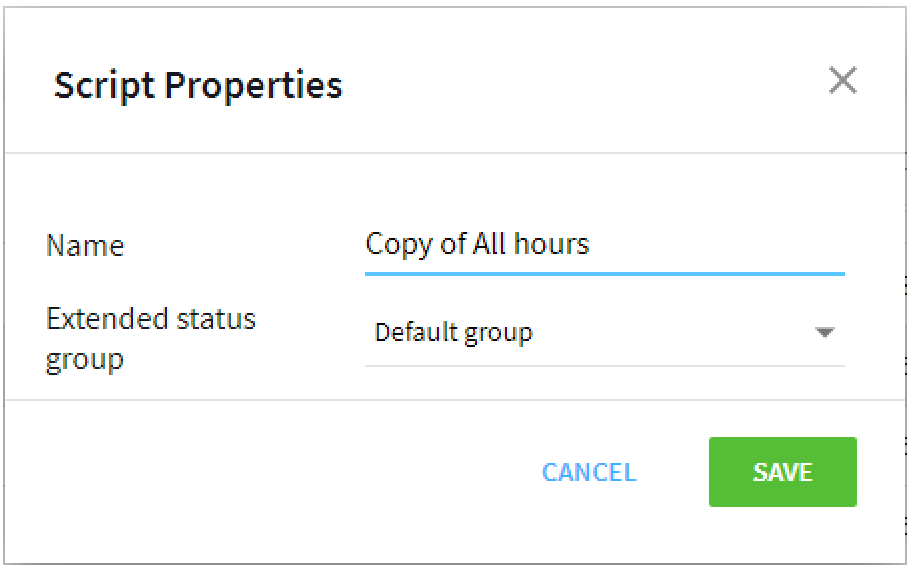


Figure 201 Modifying properties of the scheduling script

2. Edit the script name and/or the extended status group as required.

   Note that only extended statuses belonging to the selected group will be available for creating sub-rules for this scheduling script (go to Specifying Scheduling Script Rules on page 212 for more information). Information about the extended status group is not exported or imported along with the scheduling script.

3. Click **Save** to save changes, or **Cancel** to discard changes.

5.4. Copying Scheduling Script Properties to the Default Scheduling Script

If you frequently find it convenient to use a particular scheduling script's rules with the surveys you run, you may want to use this script's properties as the default. You can then copy a scheduling script's properties to the default script (the "All Hours Original" scheduling script).

To do this:

1. In the list, click on the scheduling script you wish to copy to select it, and choose **Copy to default** from the context menu that appears.

The system will automatically create a backup copy of the current default scheduling script before copying over all the settings from the selected scheduling script.

The newly updated default scheduling script will be assigned the "All Hours Original" name, while the old default script will be given a name ending in "...backup (time/date stamp)" (go to Viewing the List of Scheduling Scripts on page 200 for more information).

5.5. Viewing the Existing Scheduling Script Settings

You can view and modify the settings of any of the scripts displayed in the list. To do this:

1. In the main menu bar go to the Scheduling tab.

   The list of scheduling scripts opens.

2. Either right-click the required script in the list and choose **View** from the shortcut menu, or select the required script and click the **View** button  in the toolbar.

   The selected script's settings are displayed in the lower frame.

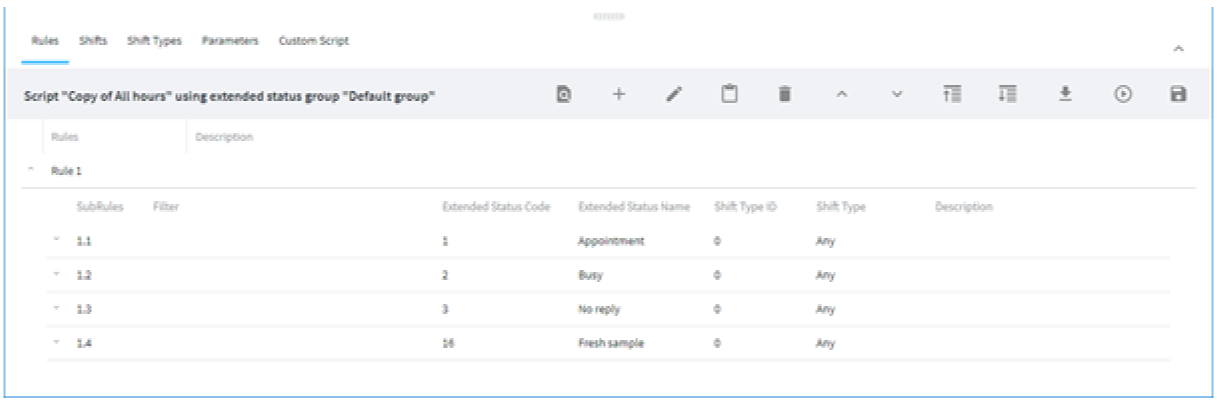


Figure 202 Viewing the script settings in the bottom right frame

A number of tabs are used to display the settings:

- **Rules** – used for specifying rules to be applied to the call (go to Specifying Scheduling Script Rules on page 212 for more information).
- **Shifts** – used for specifying shifts during which the script should be active (go to Specifying Shifts and Exclusions to use with the Scheduling Script on page 207 for more information).
- **Shift types** – used for specifying shift types (shift types are required for correct specification of the shifts) (go to Specifying the Shift (Exclusion) Type on page 205 for more information).
- **Parameters** - used for managing parameters which can be used with any action added to the script (go to Parameterized Scheduling Scripts on page 217 for more information).
- **Custom script** – allows you to enter custom code you may wish to use with the script. This code will be executed when the “Run specified script” action is defined for a sub-rule (go to Writing a Custom Scheduling Script Code on page 221 for more information).

The toolbar in the frame title bar contains the selected scheduling script name and a set of controls different for each tab (go to Modifying Scheduling Script Settings on page 204 for more information).

5.6. Modifying Scheduling Script Settings

The scheduling script settings include specifications for the time period (the “shift”), the system event and the interview state. These settings define when this script is to be run.

- **Shifts -** A "Shift" defines the particular recurring time periods during which the script can be run. The shift start and end are indicated by the day of the week and the time within that day. The set of shifts you specify for a week is then repeated each week for one year (the default parameter used by the CATI Supervisor module). Note that shifts in a single time zone cannot overlap.
- **Exclusions** - To help you fine tune the schedule, the CATI Supervisor module allows you to specify exclusions. These are one-time periods during which the script will not be active. This allows you to exclude for example holidays or particular time and date ranges from the schedule. Exclusions do not recur. An exclusion's start and end times are specified by dates and times within those dates.

  For example, you have scheduled a script to run each Monday and Wednesday starting at 09:00, and ending at 18:00. The script will run each Monday and Wednesday for a period of one year from the first day it was run, from 09:00 to 18:00. However a state holiday falls on a Monday and you do not want the script to function that day, so you exclude this particular date from the schedule.

Shifts and exclusions are specified only for a particular time zone; you cannot assign the same shift or exclusion to different time zones. See Configuring the Master Time-zone List and Configuring the Active Timezone List for more details on time zones.

All shifts are grouped according to the user's preferences. Such groups are called "Shift Types". Shift types are used to logically separate shifts – they can be grouped by the time of day, or by another logical attribute to facilitate the creation of scheduling rules (go to Specifying Shifts and Exclusions to use with the Scheduling Script on page 207 for more information).

- The other important scheduling script parameter is a set of rules that describe the interview states that trigger the script. Rules consist of sub-rules and actions which are used to instruct the system what to do with a call (an interview) when it is finished. These instructions are normally used to set a new recall time so that a call could reach a respondent.
- A sub-rule defines a condition, and a set of actions which will be executed if these condition criteria are satisfied.
- An action is a single instruction to the system to execute a single action for a call.

A scheduling script configuration procedure starts with specifying the required shift types. One you have specified the shift types, and the shifts belonging to each type, you can then proceed with adding rules. Note that the rules are specified for particular shifts.

The configured scheduling script can be discarded, saved, or saved and launched simultaneously. A saved script is stored in the Forsta database and can be accessed for editing or launching at any time. A launched script is scheduled for execution according to the specified rules.

5.6.1. Specifying the Shift (Exclusion) Type

To specify the shift (exclusion) type:

1. With the scheduling script opened in the View mode (go to Viewing the Existing Scheduling Script Settings on page 204 for more information), go to the Shift Types tab in the bottom frame.

   The list of existing shift and exclusion types opens.

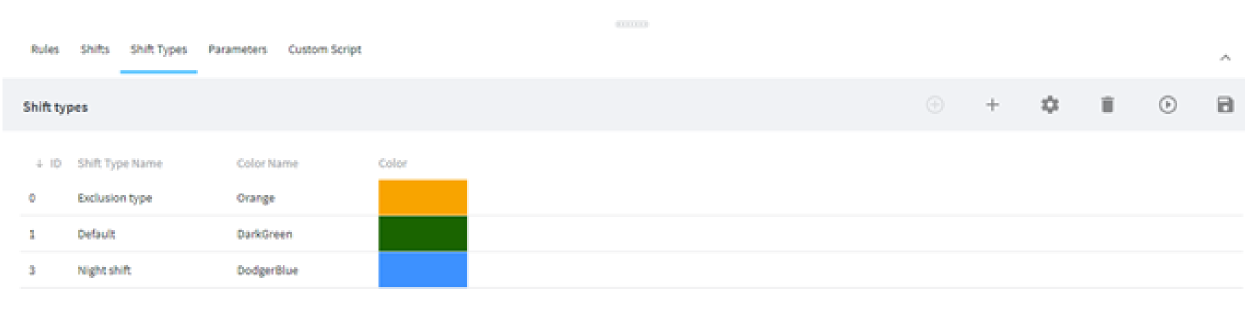


Figure 203 Creating shift and exclusion types using the Shift Types tab

From this tab you can create new shift and exclusion types, and edit or delete existing ones. All actions can be performed using the toolbar buttons or the commands in the context menu that appears when you right-click a listed item. Note that actions are applied only to the item currently selected in the list or to the item that you right-click on.

2. To create a new shift type, click the **New Shift** button on the toolbar, to create a new exclusion type, click the **New Exclusion** button on the toolbar.

   Note that you can create only one exclusion type - the **New Exclusion** button is grayed out when an exclusion type already exists.

   The New Shift Type or New Exclusion dialog opens as appropriate.

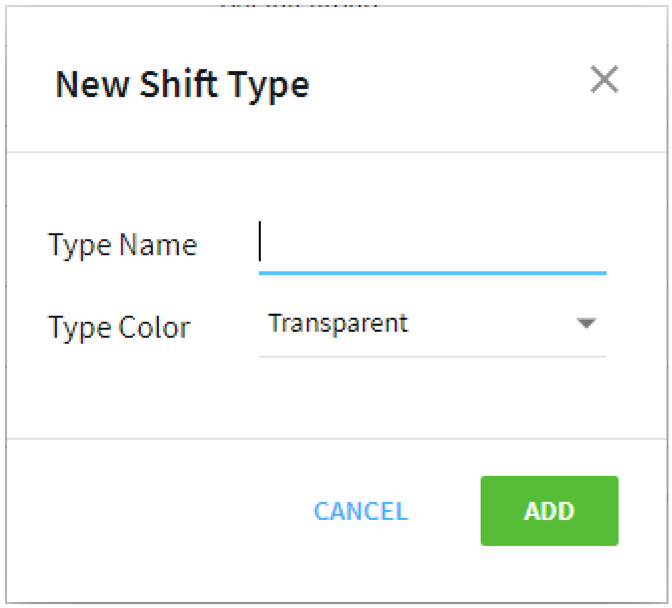


Figure 204 Adding a new shift type

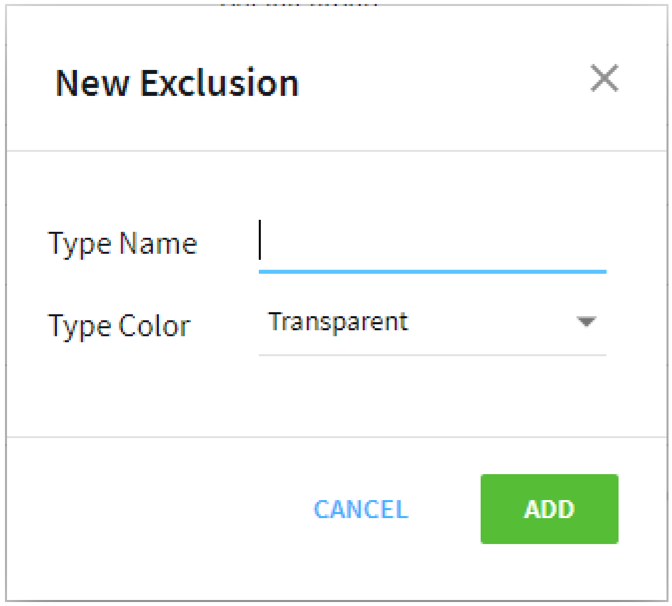


Figure 205 Adding a new exclusion type

3. Enter a name for the shift or exclusion, then select the color.
4. Click **OK** to create the shift (exclusion).

   The list in the frame refreshes and the new shift (exclusion) type appears in this list. The color you have selected will be used to display the shift (exclusion) of this type in the diagram on the Shifts tab.

4. If you wish to edit any of the listed items, select it in the list and click the **Edit** button  on the toolbar, or right-click the item and **choose** Edit from the context menu that appears.

   The dialog you have used to create the item appears with the current settings.

5. Edit the settings as required and click **OK** to confirm the changes.

You can now proceed with specifying shifts and exclusions using the Shifts tab (go to Specifying Shifts and Exclusions to use with the Scheduling Script on page 207 for more information).

5.6.2. Specifying Shifts and Exclusions to use with the Scheduling Script

Shifts and exclusions are displayed and managed on a "weekly" basis. The Shifts tab shows existing shifts and exclusions as both a list and as a table that presents listed shifts and exclusions by the days of a week. You are therefore managing shifts and exclusions as parts of "workdays" of one week.

Each shift that you create or edit for the current week will recur - the same shift pattern is applied to ALL weeks in the future.

You can also add and edit exclusions on the Shifts tab. Exclusions are created and edited in the same way as shifts, but an exclusion is a one time event - it will not recur. For example, to add another exclusion for the same time and the same day of the following week you must navigate to the required date in the future and create an appropriate single exclusion for that date.

You can specify shifts and exclusions only of the existing types. Shift and exclusion types are specified on the Shift Types tab (go to Specifying the Shift (Exclusion) Type on page 205 for more information).

You can manage shifts and exclusions in a number of time zones simultaneously. The default time zone is the respondent time zone, and initially this will be the only time zone that is available for shift/exclusion managing purposes. Other time zones can be added as required.

By default all shifts and exclusions are created in the Respondent (default) time zone. Such shifts and exclusions are marked "default" and are highlighted with the specified color.

Note that the Default time zone is a time zone which is currently chosen as the Local time zone (go to Setting the Selected Active Timezone as Local on page 389 for more information).

When a time zone other than the default time zone has been added to the Shifts tab interface, you can also create and manage shifts and exclusions in this time zone. Shifts and exclusions created in a time zone other than "default" (or "Respondent") are marked in the shift/exclusion list as "Current" in the Shift Status column. The diagram shows shifts/exclusions belonging to a time zone other than Respondent highlighted with the appropriate color (see the diagram legend).

Shifts belonging to one time zone cannot overlap. In the event you specify shift time limits that overlap with another shift, CATI Supervisor warns you by displaying a message stating which shift this shift overlaps with. An overlapping shift could not be created. Similarly, you could not create an overlapping exclusion.

Shifts belonging to different time zones can overlap. However, if you attempt to create a shift in the Default (Respondent) time zone that intersects with a shift in another time zone, CATI Supervisor warns you of the intersection and prevents creation of the shift in the Default time zone.

When you create a shift in a time zone other than Default (Respondent) and it intersects with the Default shift, CATI Supervisor allows you to create the a shift but automatically marks the Default shift as "Has Overridden" in the Shift Status column.

When you change the current time zone to any zone other than the Default (Respondent), and open the Default shift properties for editing, this shift becomes "Current" for the current time zone and it will then be marked in the Default (Respondent) time zone as "Has Overridden" in the Shift Status column.

To specify a shift or exclusion:

1. With the scheduling script opened in the View mode (go to Viewing the Existing Scheduling Script Settings on page 204 for more information), select the Shifts tab in the bottom right frame.

   The list of existing shifts is displayed.

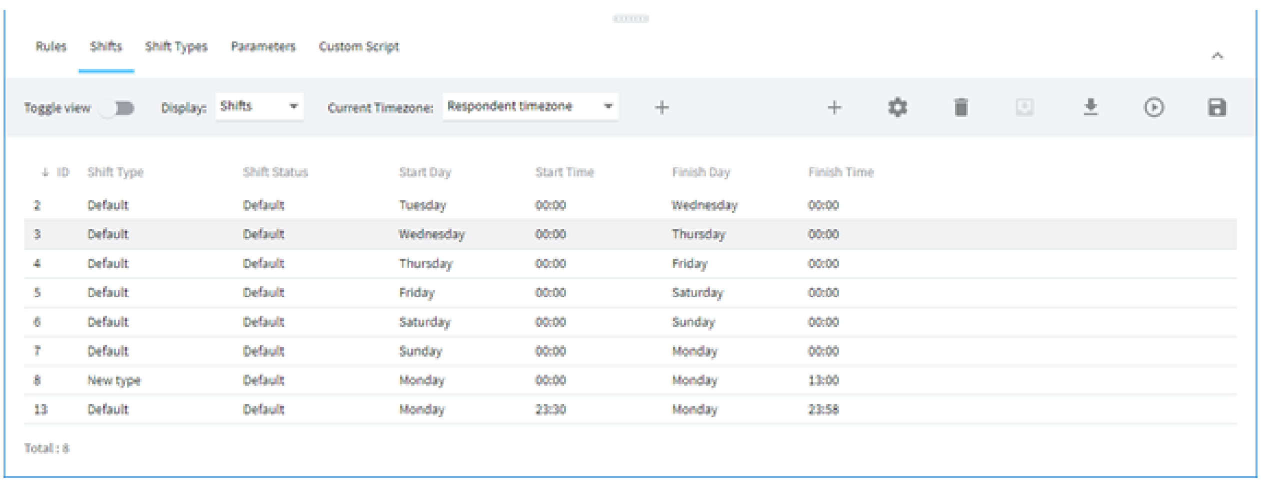


Figure 206 The Shifts tab showing the shift list

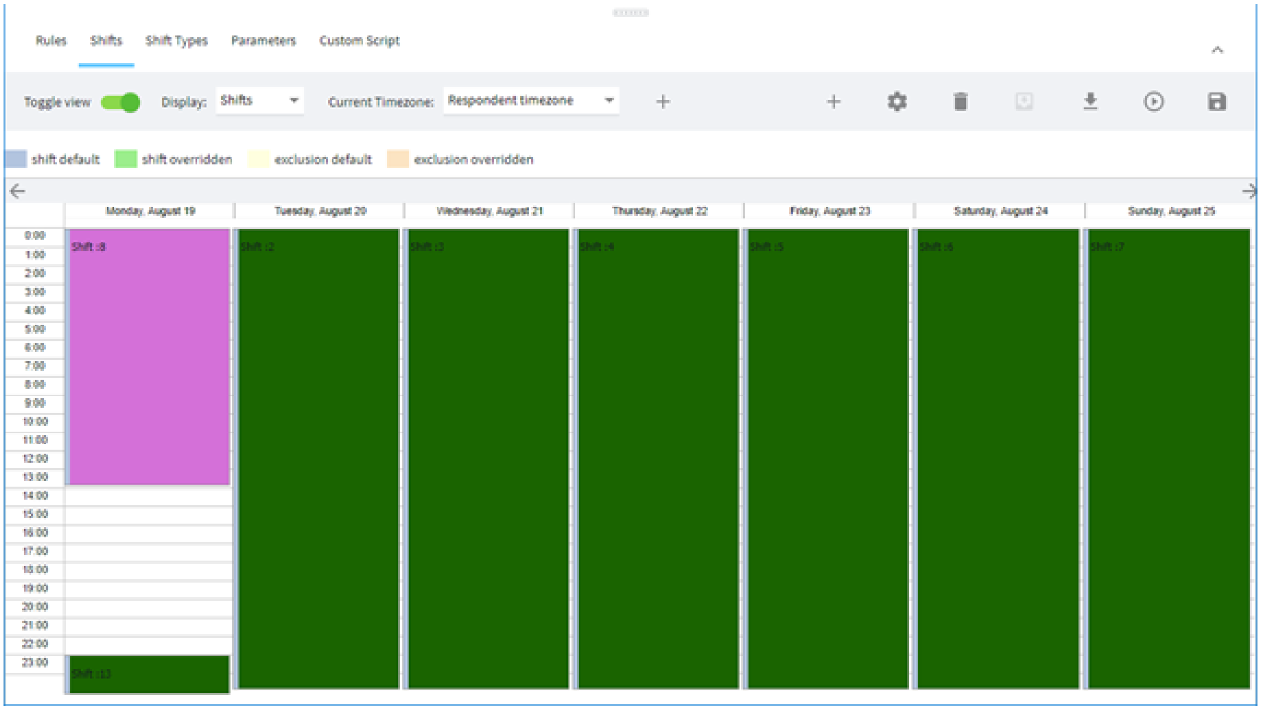


Figure 207 The Shifts tab showing the corresponding shift color diagram

2. The Shifts tab can display either the existing shift and exclusion list, or a corresponding color diagram. Click the Toggle view slider (when enabled) to change the view.

   The list and the diagram view show all shifts and exclusions that are currently defined for the selected timezone.

   A time zone for managing shifts and exclusions can be selected from the Current Timezone drop-down list. By default only the respondent time zone is available for managing shifts and exclusions. This time zone is also considered a default time zone. You can add more time zones to this list - see step 4 below for instructions.

   When another time zone is selected from the Current Timezone drop-down list, the list and the diagram are refreshed.

   Remember that shifts cannot overlap inside one time zone. Current shifts from different time zones does not affect each other, with one exception - you cannot create a default shift that overlaps with a pre-existing Current shift in another time zone.

   Use the **Display** drop-down list in the frame title bar to select the type of items that are to be displayed. the options are **Shift**, **Exclusion** and **Both**.

   The diagram presents listed items graphically. The shifts and exclusions are presented as colored bars, the colors assigned to the various shift types are indicated in the legend above the diagram.

   All diagram bars representing shifts are assigned colors that were specified for shifts of the appropriate type.

   The diagram legend shows colors that are used to highlight default and overridden shifts and default and overridden exclusions. "Default" and "overridden" highlights are stripes of the appropriate color appearing on the left side of each bar which represents a shift or exclusion. A "default" shift/exclusion is the one created for the respondent (default) timezone. Shifts and exclusions created for any other time zone are considered "overridden".

   The diagram's header row shows week days and specific dates. The header cell corresponding to the current date is highlighted in white.

3. Using this tab’s interface you can create new, edit and delete existing shifts and exclusions. All actions are available both through the use of the buttons located on the toolbar above the list, or through commands contained in the context menu, which appears when you right-click any listed item.

Note that you can create new shifts only when the list displays shifts only, new exclusions - when the list displays exclusions. When the list displays both shifts and exclusions all managing commands become unavailable.

Actions are applied only to the item currently selected in the list, or to the item that you right-click on.

Choosing **New** from the context menu opened by clicking the shift item, creates a new shift, and choosing **New** from the context menu invoked by clicking the exclusion item creates a new exclusion.

You can also export the defined shift or exclusion description.

To add a shift or exclusion:

1. Select the time zone to which this shift is to be added.
2. From the Current time zone drop-down list select the time zone you wish to add the new shift (exclusion) to.
3. If the time zone you need is not on the list, add it by clicking the **Add** button (to the right of the Current time zone drop-down box), and choosing one from the displayed list.

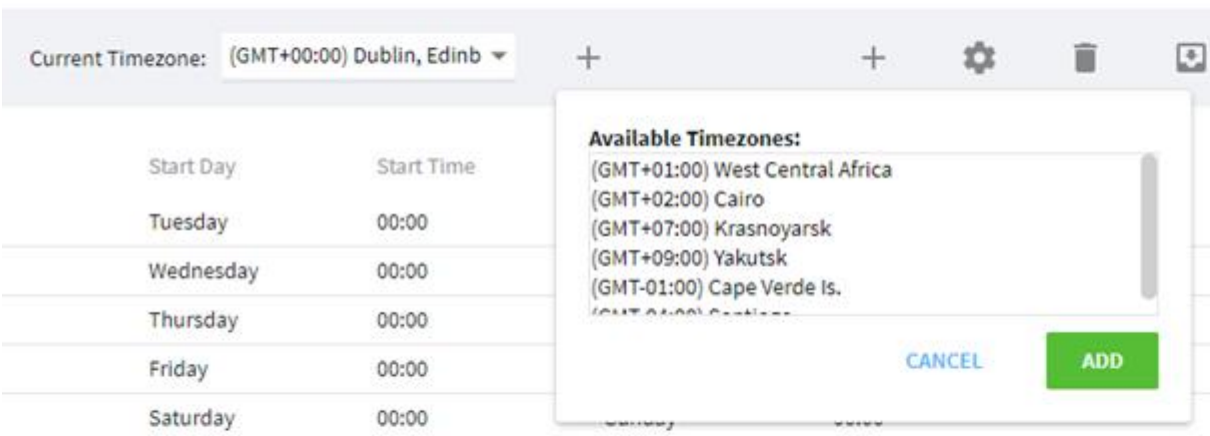


Figure 208 Adding a time zone

If the required time zone is not included in this list, activate it so that it can appear in the list (go to Activating the Selected Master Timezone on page 387 for more information).

You can now add the new shift or exclusion - the procedure is the same for both items. Note that you can create a new Shift only in the “Shifts” display mode, and a new exclusion only in the “Exclusions” display mode (selected using the Display drop-down box).

4. Click **New**.

The New Shift/Exclusion dialog opens.

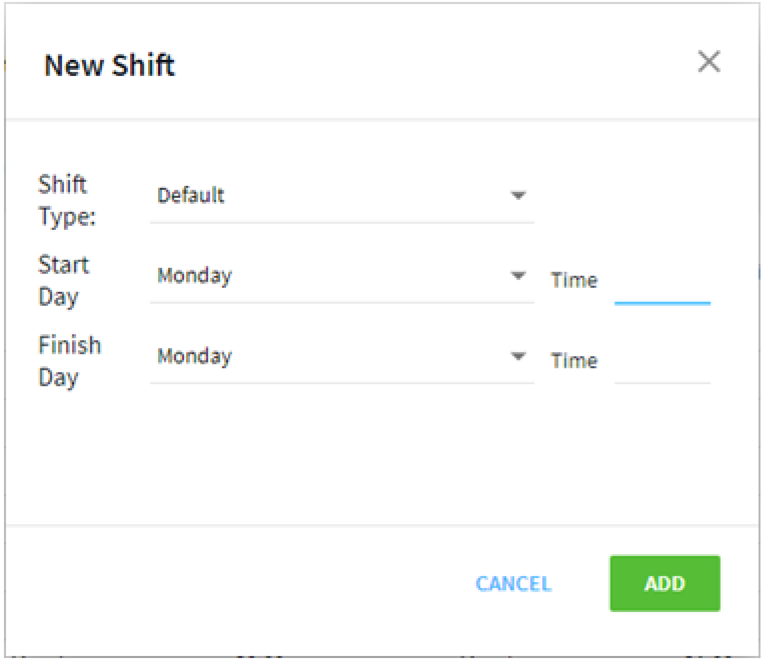


Figure 209 Adding a new shift

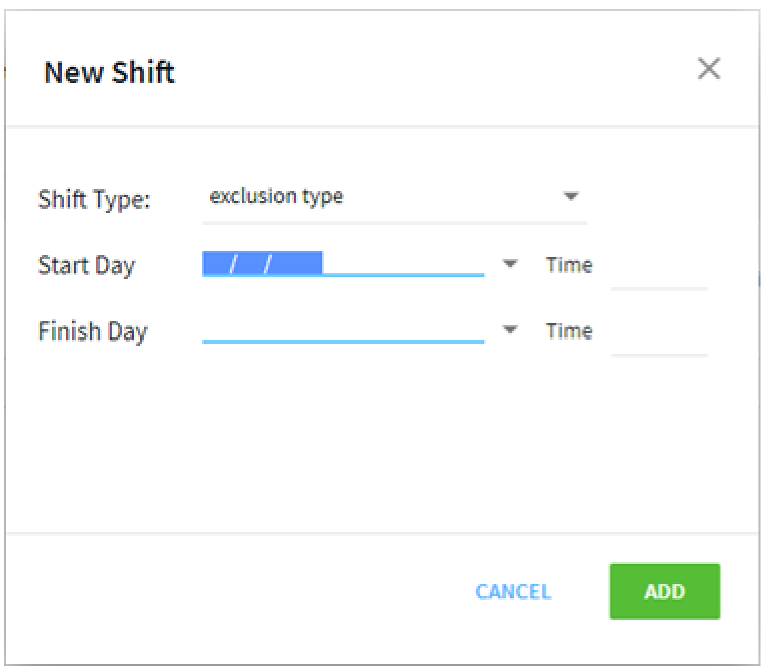


Figure 210 Adding a new exclusion

5. Choose the shift (exclusion) type in the Shift type field.

6. For a shift, select the Start Day and enter the start time (in HH:MM format), then select the Finish Day and enter the finish time.

   For an exclusion, enter (in DD/MM/YYYY format), or select the Start Day and the start time (in HH:MM format), then enter the Finish Day and the finish time.

Note that shifts are always recurring, while exclusions are one time events.

7. Click **OK** to create the shift (exclusion).

   The list in the frame refreshes, and the new shift (exclusion) appears in this list. The item ID (displayed in the first grid column) is a unique number – it is generated by the system and cannot be edited.

   You can set any "overridden" shift (which belongs to any time zone other than default) to become a "default" shift. It will then be marked as default in the Shift Status column. To do so, choose the required time zone from the Current time zone drop-down list, then choose the required shift in the shift/exclusion list, then click the **Set Default** button on the toolbar or right-click this shift in the list and choose **Set Default** from the context menu.

To edit a listed shift or exclusion:

1. Select the required shift or exclusion in the list and click the **Edit** button on the toolbar, or right-click the item and choose **Edit** from the context menu that appears.

   Note that shifts can only be edited in the “Shifts” display mode, and exclusions edited only in the “Exclusions” display mode (selected using the Display drop-down box).

   The dialog you have used to create the item opens. The dialog fields contain the current settings - edit them as required and click **OK** to confirm the changes.

You can proceed with specifying scheduling rules using the Rules tab.

5.6.3. Specifying Scheduling Script Rules

A scheduling script can use any number of rules. A scheduling rule consists of sub-rules and actions.

A rule can be seen as a container for sub-rules. To correctly define a rule it should contain at least one sub-rule, for example specifying what extended status during which shift will trigger the script, and one action for this sub-rule, for example specifying the action that is to be performed and how it is to be executed when the sub-rule is satisfied. A rule can contain any number of sub-rules, and a sub-rule can contain any number of actions.

You can search through an existing scheduling script for a particular rule, sub-rule or action (go to Searching for a Particular Rule, Sub-rule or Action in the Scheduling Rules List on page 217 for more information).

To specify a scheduling script rule:

1. Open the scheduling script in the View mode (go to Viewing the Existing Scheduling Script Settings on page 204 for more information).

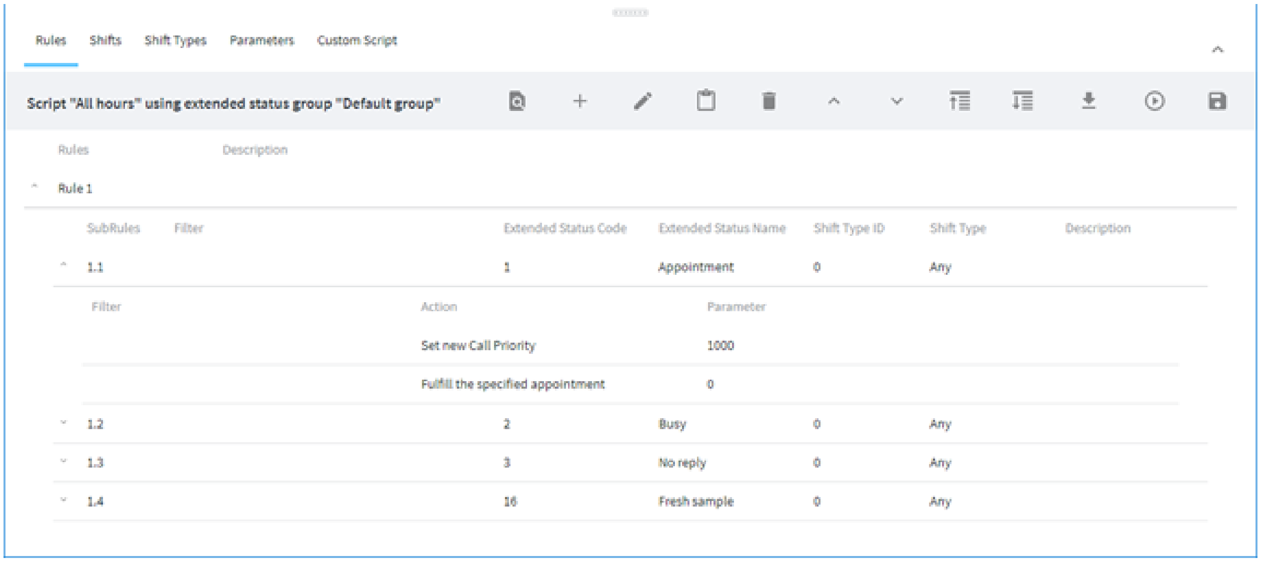


Figure 211 Viewing the scheduling rule list for the selected scheduling script

- Scheduling rules are presented in the list as a hierarchy where sub-rules are presented as branches of the appropriate rules, and actions are presented as branches of the appropriate sub-rules.
- The sub-rules and actions will normally be executed in the order they are listed.
- By default all listed items are collapsed. You can expand any item by clicking the plus sign in front of its name or you can expand or collapse all items simultaneously by pressing the **Expand All** or **Collapse All** buttons on the toolbar.

From this tab you can create new, edit and delete existing rules, sub-rules and actions. All these operations can be performed by using the buttons in the toolbar above the list, or by selecting commands in the menu that appears when you right-click any listed item.

You can copy and then paste selected rules, sub-rules and actions. Copied items can only be pasted into the same scheduling script. All items are copied alone, without sub-items (that is rules are copied without sub-rules, sub-rules without actions).

You can move sub-rules up or down the list within the limits of one rule, and you can move actions up or down the list within the limits of one sub-rule.

Operations are applied only to the item currently selected in the list, or to the item that you right-click upon.

- To create a new rule, select a rule in the list and click the **New** button on toolbar, or right-click the selected rule and choose **New** from the context menu. The new rule is inserted in the list below the selected one.
- To create a new sub-rule, select a sub-rule in the list and click the **New** button on toolbar, or right-click the required rule and choose **New Subrule** from the context menu.
- To create a new action, select an action in the list and click the **New** button on toolbar, or right-click the required sub-rule and choose **New Action** from the context menu.

You can also export the defined scheduling rule description (along with all sub-rules and actions specified for this rule).

New rule:

The **New** command for a rule displays the dialog as shown below.

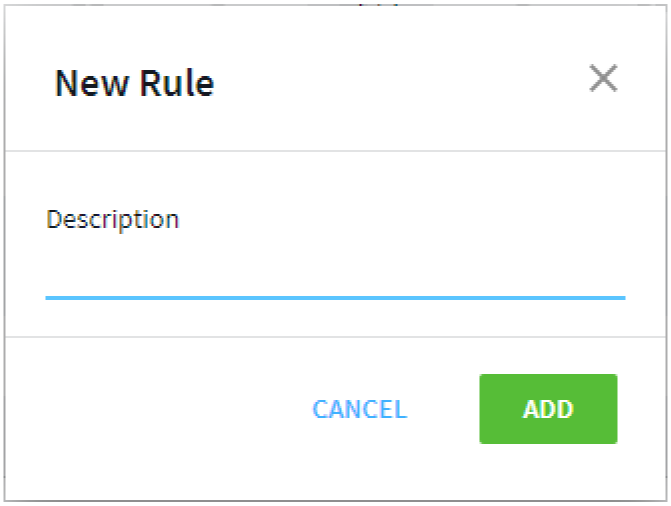


Figure 212 Adding a new scheduling rule

1. Enter the rule description in the Description field.
2. Click **Add** to create the rule.

   The list in the frame refreshes, and the new rule appears in this list. The rule number (displayed in the first grid column) is a unique number generated by the system and cannot be edited. Normally it shows the execution order of the rule.

New sub-rule:

The **New** command for a sub-rule displays the dialog as shown below.

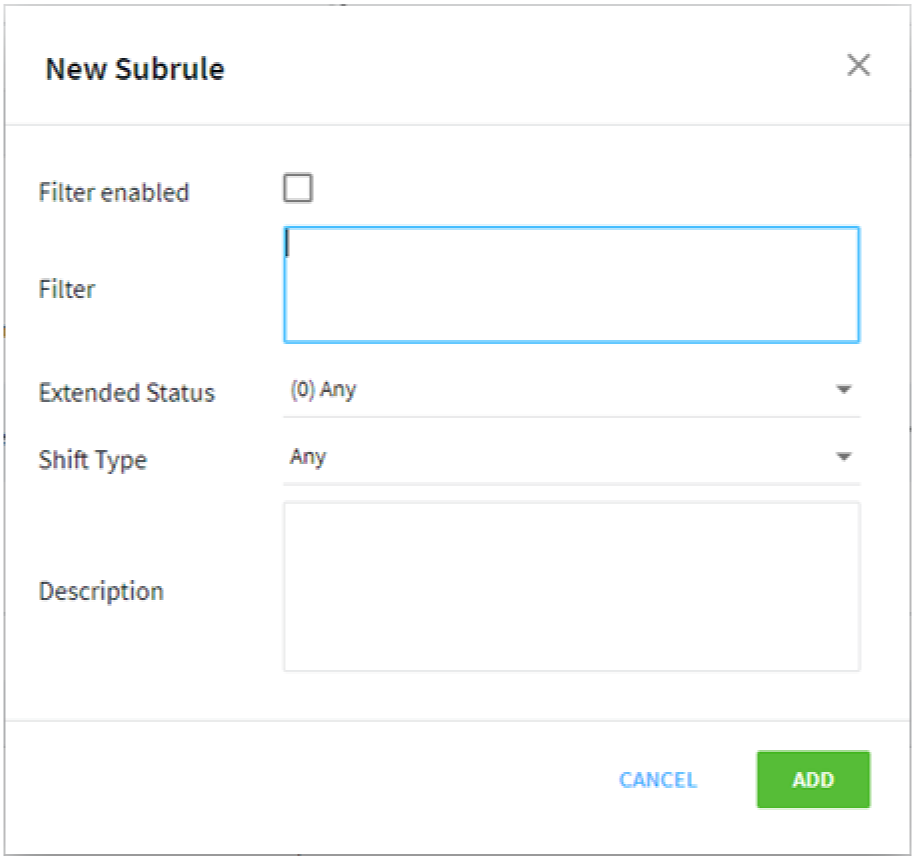


Figure 213 Adding a new sub-rule

1. Enter a filter expression in the Filter field (in case you need to apply this sub-rule only to interviews matching this filter).
2. Check the Filter enabled box to enable the filter, otherwise leave it clear.
3. Select the required interview extended status (this sub-rule will trigger the script when an interview is assigned this state).
4. Select the required shift type (this sub-rule will trigger the script only during this shift).
5. Enter a description for the sub-rule.
6. Click **Add** to create the sub-rule.

   The list in the frame refreshes, and the new sub-rule appears in this list as a branch of the selected rule.

   The sub-rule ID (displayed in the first grid column) is a unique number generated by the system and cannot be edited. Normally it shows the execution order of the sub-rule.

New action:

The **New** command for an action displays the dialog as shown below.

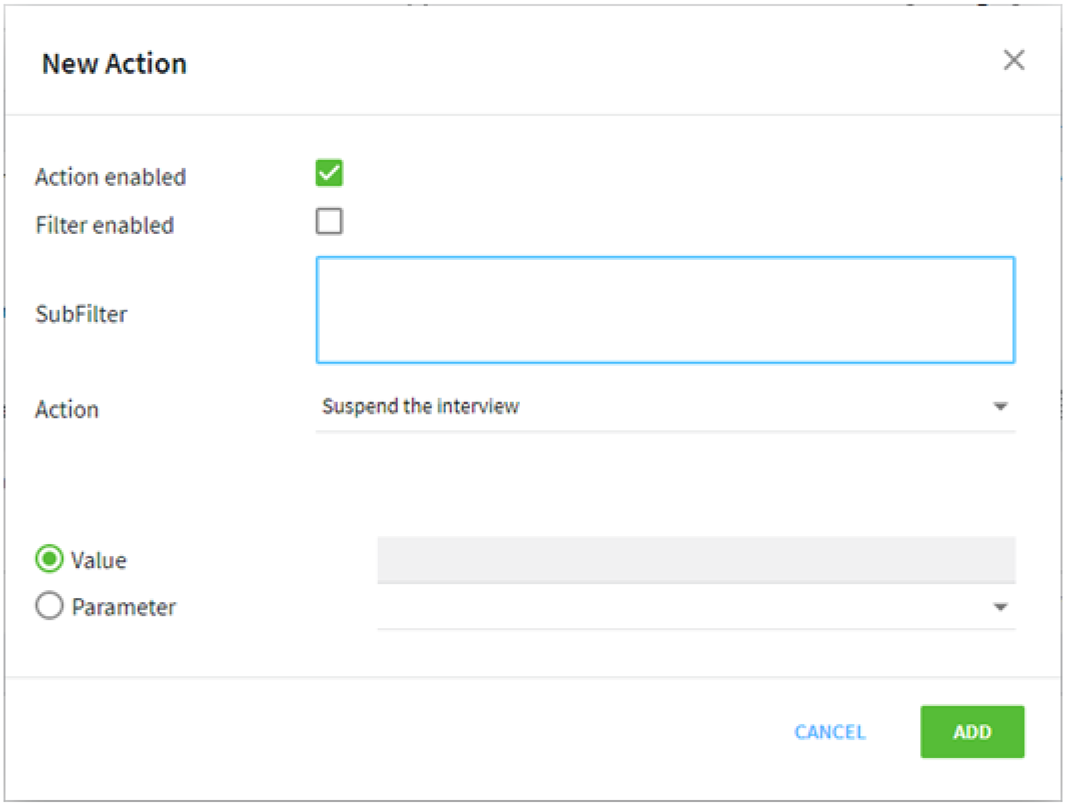


Figure 214 Adding a new action

The Action enabled box is checked by default. Clear it to disable this action.

1. Enter the filter expression in the SubFilter field (this expression is added to the sub-rule filter expression, and the action subfilter is applied after the sub-rule filter). Refer to the Forsta Scripting guide for instructions on how you can use different functions to build a subfilter expression.
2. Check the Filter enabled box to enable the subfilter. Otherwise leave it clear.
3. Select the action type in the Action drop-down box (this specifies what action is performed). The Value field becomes accessible and allows you to enter a parameter value in the event this is required by the selected action type.

   A prompt appearing between these fields is context sensitive and indicates the meaning of the parameter, the required format and the correct parameter limits.

   You can also choose the parameter value from the list of parameters that were already defined for use with this scheduling script on the Parameters tab (go to Parameterized Scheduling Scripts on page 217 for more information). To choose an existing parameter, and to create a "parameterized" scheduling script, select a parameter from the Parameter drop-down list.

   Note that adding the "Disable call" and "Enable call" actions to a scheduling rule is the only way to automate the disabling and enabling of calls. Normally these actions can only be performed manually when these properties are explicitly set in the appropriate dialogs.

   Refer to Appendix A for a list of the action parameters.

Note: If the rule you are creating is to generate a call, it MUST contain at least one of the actions that are marked appropriately in the list in Appendix A. A comment for such an action states that it "Generates a call". Without one of these actions in the rule, no call will be generated.

4. Click **Add** to create the action.

   The list in the frame refreshes and the new action appears in this list as a branch of the selected sub-rule.

5.6.3.1. Searching for a Particular Rule, Sub-rule or Action in the Scheduling Rules List

You can search the scheduling rule list to find a rule, sub-rule or action which has an attribute value matching a specified condition. To search the scheduling rule list:

1. With the scheduling script opened in the View mode (go to Viewing the Existing Scheduling Script Settings on page 204 for more information), choose the Rules tab in the lower frame.
2. Click the **Search** button in the frame's title bar.

   The search dialog opens.

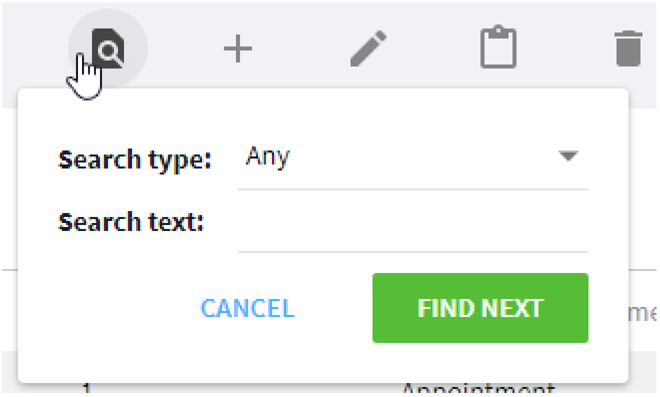


Figure 215 Searching the scheduling rule list

3. In the Search type drop-down box select an attribute to search through. Enter the search string in the Search text field; wild-cards are supported.
4. Click the **Find next** button. The first item with the selected attribute value matching the search condition will be highlighted in the list.
5. Click the **Find next** button again to highlight another match.
6. Click **Cancel** to close the dialog .

5.6.4. Parameterized Scheduling Scripts

The supervisor can create a set of parameters for each available scheduling script. Parameter set is added to each script individually. Any parameter from the set can be used with any appropriate action contained in the script. The scheduling script which uses parameters from this set is called the "parameterized" scheduling script. A parameter is considered as "used in the script" not when it is added to the script, but only when it is selected as a parameter for an action which is used in the scheduling script rule.

No more than 30 parameters are allowed in a single scheduling script.

Parameter set for a scheduling script is created using the Parameters tab in the bottom right frame when the Script View is displayed. The parameter set added on the Parameter tab of the Script View is available company wide - it can be used with any survey which uses that script. These parameter values are considered as default values.

CATI Supervisor also allows modifying the default values of the parameterized scheduling script for each survey individually - this can be done using the Scheduling Parameters tab of the Survey Information view (see (go to Viewing and Modifying Parameters of the Scheduling Script used with the Survey on page 102 for more information) for details).

The scheduling script parameter set can be modified - parameters can be added and deleted at any time. Before deletion CATI Supervisor always checks if the parameter to be deleted is currently used with some action.

The parameterized scheduling script needs to be saved and re-launched each time any parameter setting is modified.

To add a parameter to the scheduling script:

1. Display the Script View in the bottom frame for the required scheduling script (go to Viewing the Existing Scheduling Script Settings on page 204 for more information).
2. Go to the Parameters tab.

   If no parameters have been added to the script as yet the tab will be empty. Otherwise the available parameters are listed.

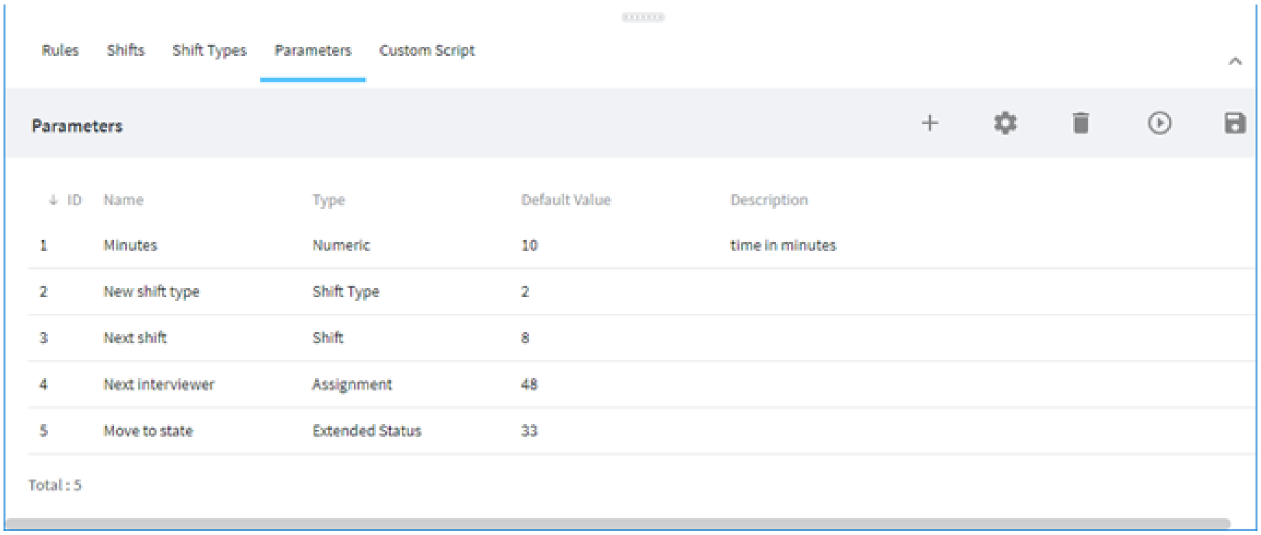


Figure 216 Viewing the scheduling script parameter set

3. Either click the **New Parameter** button on the toolbar or right-click any grid row and choose **New Parameter** from the context menu that appears.

   The New Parameter dialog opens.

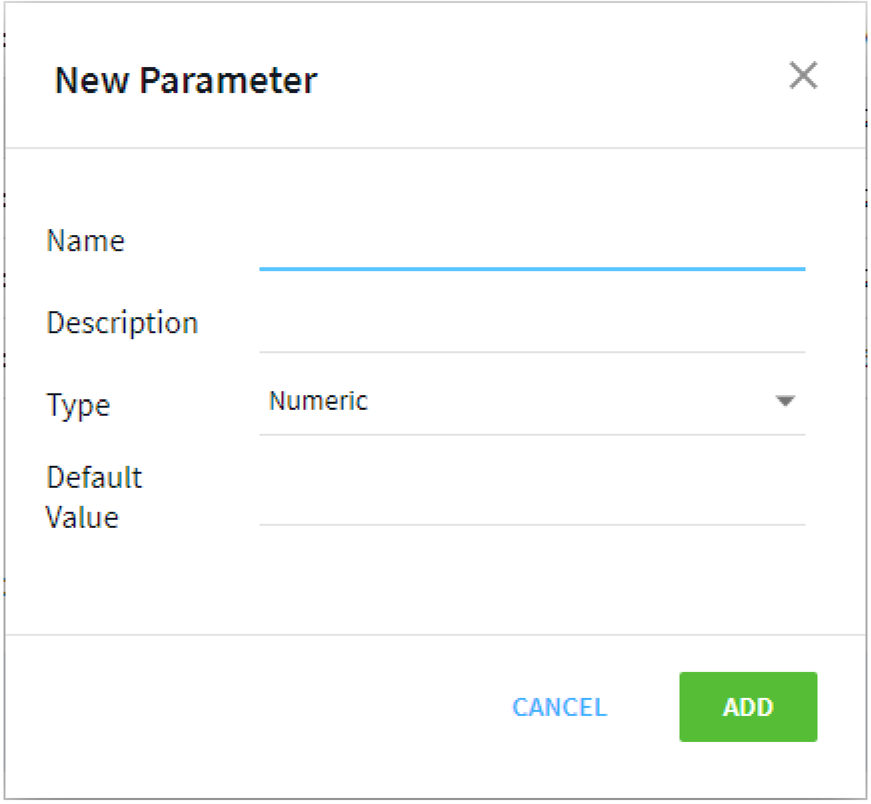


Figure 217 Adding a parameter to the scheduling script

4. Enter the Name and Description of the parameter in the appropriate fields.
5. Choose the parameter type from the Type drop-down list. The following types are supported:
   - **Numeric** - an integer. Can be used with any action which supports numerical values.
   - **Shift** - values that are supported for use with the appropriate action (go to Appendix A - Action Parameter Descriptions on page 458 for more information).
   - **Shift type -** values that are supported for use with the appropriate action (go to Appendix A - Action Parameter Descriptions on page 458 for more information).
   - **Assignment -** values that are supported for use with the Assign User/Group action (go to Appendix A - Action Parameter Descriptions on page 458 for more information).
   - **Extended status -** the Extended status ID.
6. Enter the required default parameter value in the Default Value field.

   This value will be used for all actions with which this parameter is used (go to Specifying Scheduling Script Rules on page 212 for more information).
7. Click **Add** to add the created parameter, or **Cancel** to close the dialog and discard any changes.

To edit an existing parameter:

1. Display the Script View in the lower frame for the required scheduling script (go to Viewing the Existing Scheduling Script Settings on page 204 for more information).
2. Go to the Parameters tab, select the required parameter in the list and either click the **Edit** button on the toolbar, or right-click in the row and choose **Edit** from the context menu that appears.

   The Add Parameter dialog opens with the current values.

3. Modify the values as required.
4. Click **Add** to save the modified parameter or **Cancel** to close the dialog and discard any changes.

To delete an existing parameter:

1. Display the Script View in the lower frame for the required scheduling script (go to Viewing the Existing Scheduling Script Settings on page 204 for more information).
2. Go to the Parameters tab, select the required parameter and either click the **Delete** button on the toolbar or right-click in the row and choose **Delete** from the context menu that appears.

   A confirmation dialog opens.
3. Click **OK** to delete the parameter or **Cancel** to close the dialog without deleting.

To save and optionally launch the saved script:

To check the system you should save and launch the scheduling script after you change parameter settings.

1. Click the **Save** button on the toolbar to save the current scheduling script, or click the **Save and Launch** button on the toolbar to save and launch the script.

5.6.5. Copying and Pasting Scheduling Rule Items

To copy and paste scheduling rule items:

1. With the scheduling script opened in the View mode (go to Viewing the Existing Scheduling Script Settings on page 204 for more information), go to the Rules tab in the lower frame.
2. Select a rule, sub-rule, or action and right-click on it.

   The item is copied. Note that "sibling" items are not copied.
3. Select the row in the grid where you wish to paste the copied item. Note that the item will still be inserted on the appropriate hierarchy level – a rule on a rule level, a sub-rule on a sub-rule level etc.
4. Right-click the selected row or click the **Paste** button in the toolbar.

   The item is pasted below the selected the row taking into account the script hierarchical structure.

5.6.6. Exporting the Scheduling Script Definition

You can export the selected scheduling script definition as a description in the XML format. To export the scheduling script definition:

1. With the required scheduling script opened in the View mode (go to Viewing the Existing Scheduling Script Settings on page 204 for more information), go to the Rules tab in the lower frame.
2. Click the **Export** button in the frame's toolbar.

   A dialog opens prompting you to choose what to do with the saved XML data.
3. Click the **Save** button.

   A standard Windows Save As dialog opens.
4. Browse to the location where the file is to be saved and click the **Save** button.

   The scheduling script definition is saved to a file in XML format.

To view the file, click the **Open** button. The scheduling script definition is opened in the application which is used by your system by default to view files in XML format.

Note: This command exports the complete definition of the scheduling script you are currently viewing, not a specific rule, sub-rule or action, regardless of which rule, sub-rule, or action is selected in the Rules tab. This command performs the same action as the Scheduling script export command available from the upper frame's toolbar .

5.6.7. Changing the Order in which Rules, Sub-rules, and Actions are Executed

Rules, sub-rules, and actions are executed in the order in which they are listed – items standing higher in the list are executed first. You can therefore change the execution order by moving any rule, sub-rule, or action higher or lower in the list. Note that a sub-rule can be moved only within the limits of the rule it belongs to, and an action can be moved only within the limits of the sub-rule.

To change the execution order:

1. With the scheduling script opened in the View mode (go to Viewing the Existing Scheduling Script Settings on page 204 for more information), go to the Rules tab in the lower frame.
2. Select the rule, sub-rule, or action you wish to move and click the **Move Up** or **Move Down** button as appropriate.

   A confirmation dialog opens.

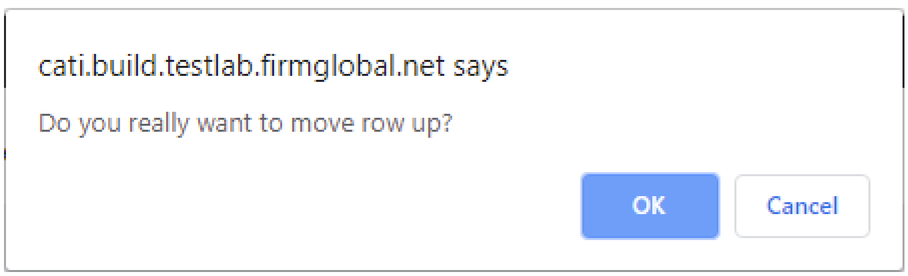


Figure 218 Confirmation dialog for Move operation

3. Click OK to confirm the move.

   The lower frame refreshes and the listed items are sorted into the new order. To move an item multiple rows, repeat the operation as necessary.

5.6.8. Writing a Custom Scheduling Script Code

In the event you want the scheduling script to perform operations which cannot be configured using the regular CATI Supervisor functions available through the user interface, you can write the script code manually. This requires a thorough knowledge of the JavaScript.NET language.

The script code you enter using this tab is executed only when the “Run specified script” action is enabled (go to Specifying Scheduling Script Rules on page 212 for more information).

To create a custom scheduling script code manually:

1. With the scheduling script opened in the View mode (go to Viewing the Existing Scheduling Script Settings on page 204 for more information), go to the Custom Script tab in the lower frame.

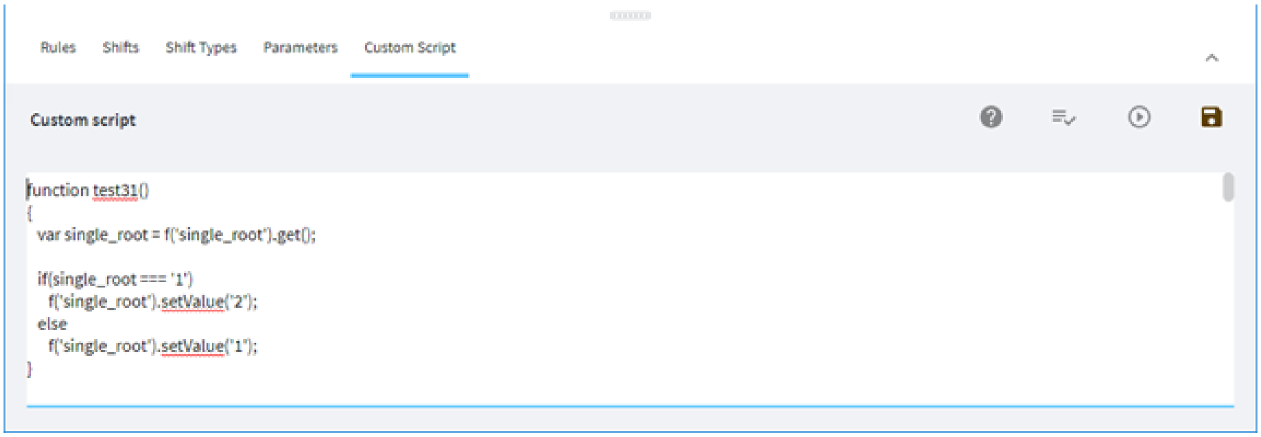


Figure 219 Adding a custom script

This tab comprises a text field where you enter your script code.

2. Enter the script code (JavaScript.NET language is used) in the text field.

   Note that you can also paste the contents of your clipboard into this field, so you can write the code in another application and copy it in.

3. Click the **Check** button in the lower frame's toolbar to check the code for errors - the results of the check are displayed in a separate dialog.

   It may be useful to refer to the Scripting Reference; this opens in a separate window when you click the Scripting Reference button .

   The tab's toolbar also holds the **Save and Launch** button ; click this to save and launch the current scheduling script, and the **Save** button which saves the scheduling script without launching it. Refer to (go to Accessing the Call Object in Custom Scripting on page 222 for more information)for detailed instructions on writing and using scripts and for script code examples.

5.6.8.1. Accessing the Call Object in Custom Scripting

This topic describes how the call object can be accessed in custom scripting, inside of CATI scheduling.

This functionality is available through the "Scheduling" object which is available in custom scripts. The "Scheduling" object has the following properties:

Type	Name	Description
BvSurveyEntity	Survey	This object provides data for the survey which contains the current interview. ReadOnly.
BvInterviewEntity	Interview	This object provides data for interview which is scheduled. Read/Write.
BvCallEntity	LastCall	If the scheduling script is run for interview which previously had a call, then this object contains info about the call, otherwise null. ReadOnly.
BvCallEntity	NewCall	If the scheduling script creates a call, this object provides info about the new call. If the object is null, call will not be created upon scheduling completion. Read/Write.
DateTime	Time	Scheduling time.

ShiftService	Shifts	This object provides for shift functionality.

A function exists to initialize a new call inside of the scheduling object when used via a custom scheduling script:
`CallShouldBeCreated()`

Once initialized Scheduling.NewCall will be initialized and available.

To cancel the creation of the new call set Scheduling.NewCall to Null.

Object breakdown

BvSurveyEntity object provides access to survey data as follows:

Type	Name	Description
Int	SID	Internal object ID
String	Name	Project ID
String	Description	Project name
Int	ScheduleID	Scheduling script ID

BvInterviewEntity object provides access to interview data as follows:

Type	Name	Description
Int	ID	ID of interview
String	TelephoneNumber	Respondent telephone number
String	RespondentName	Respondent name
Int	TimezoneID	ID of respondent timezone
Int	TransientState	Extendend status
DateTime	LastCallTime	Last call time
Int	LastCallPersonSID	User ID of last interview
byte	DialingMode	Dialing mode

BvCallEntity object provides access to call data as follows:

Type	Name
int	CallID
int	SurveySID
int	InterviewID
int	Phase
int	RoleID
int	ShiftID

DateTime	TimeInShift
DateTime	TimeToExpire
int	Priority
int	Resource
int	ApptID
int	ResourceType
Guid	RuleNumber

Shift functionality is available through the ShiftService object supporting methods when working with shifts:

- MatchingShift GetExactShift(DateTime utcNowTime, int tzID)
- MatchingShift GetMatchingShift(DateTime utcTime, int tzID)
- DateTime GetMatchingTime(DateTime utcNowTime, int tzID)
- MatchingShift GetNextShift(MatchingShift currentShift, int tzID)
- MatchingShift GetNextShift(MatchingShift currentShift, int tzID, out int countSkipShifts)
- MatchingShift GetNextShiftByID(DateTime utcTime, int tzID, int scriptShiftID)
- MatchingShift GetNextShiftOfSpecifiedType(DateTime utcTime, int tzID, int scriptShiftTypeID)
- MatchingShift GetShiftAfterNumberOfMinutes(DateTime utcNowTime, int tzID, int countMinutes)
- MatchingShift GetShiftAfterNumberOfShifts(DateTime utcNowTime, int tzID, int numberOfShifts)
- MatchingShift GetShiftAfterNumberOfShifts(MatchingShift curentShift, int tzID, int numberOfShifts, bool isTakingExclusionIntoAccount)

Custom code examples

1. Custom script creates new call with priority 10

```
function ScriptFunction()
{
      CallShouldBeCreated();
      Scheduling.NewCall.Priority = 10;
}
```

2. Custom script creates new call with priority which is taken from number variable with 'num_prior' name

```
function ScriptFunction()
{
      CallShouldBeCreated();
      Scheduling.NewCall.Priority = f("num_prior").get();
}
```

3. Custom script creates new call with time to call on next shift

```
function ScriptFunction()
{
      CallShouldBeCreated();
      var shift = Scheduling.Shifts.GetMatchingShift( Scheduling.Time,
      1/*Timezone*/ );
      shift = Scheduling.Shifts.GetNextShift( shift, 1/*Timezone*/ );
```

```
        Scheduling.NewCall.ShiftID = shift.ShiftTypeID;
        Scheduling.NewCall.TimeInShift = shift.StartDate;
    }
```

4. Custom script creates new call and assigns the interviewer with the ID from variable ‘inter’

```
function ScriptFunction()
{
    CallShouldBeCreated();
    var name = f("inter").get();
    Scheduling.NewCall.Resource = PersonRepository.GetByName( name ).SID;
}
```

5. Custom script writes the interviewer's SID to variable 'history' (for all interviewers who have conducted an interview)

```
function ScriptFunction()
{
    var history= f("history").get();
    var name : String = "";
    if( Scheduling.Interview.LastCallPersonSID != 0 )
    {
        var person =
        PersonRepository.GetByID(Scheduling.Interview.LastCallPersonSID);
        if( person != null )
        {
            if( String.InNullOrEmpty(history))
            history = person.name;
            else if( !String.Split( history, ',' ).Any( x => x ==
            person.name ) )
            history = history + "," + person.name;
            else
            return;
            f("history").setValue(history);
        }
    }
}
```

5.6.9. Saving a Scheduling Script

The Save operation stores all the parameters of the scheduling scripts in the Forsta database.

The CATI Supervisor prompts you to save the scheduling script each time you modify any of its parameters on any tab in the bottom right frame – the Save button in the bottom right frame toolbar starts flashing when you do that. It is a good idea to save the script periodically while you edit it because all unsaved changes are lost in case a power failure or other problem occurs.

The Save operation does not enable the script (does not “launch” it – see Launching a Scheduling Script for details). It only stores the script – as a draft, so to say. You may edit the saved script later on, or delete it, or use as a template for creating other scheduling scripts.

To save a scheduling script:

1. While you are creating (or editing the existing) scheduling script click the Save button in the bottom right frame toolbar. The bottom right frame refreshes, and CATI Supervisor displays a message informing you of a successful script save.

   It is recommended that you click the **Save** button each time it starts flashing - this is CATI Supervisor prompting you to save the changes you have made to the scheduling script.

5.6.10. Launching a Scheduling Script

When you finish configuring and checking the scheduling script you may enable it (or “launch” it).

This operation saves the scheduling script (the way it is described in Saving a Scheduling Script), and then launches it. After that the script will be triggered according to the specified rules.

To save a scheduling script:

1. Open the scheduling script in the View mode (see Viewing the Existing Scheduling Script Settings for details), and choose any tab in the bottom right frame.
2. Click the Save and Launch button in the bottom right frame toolbar. The bottom right frame refreshes, and the CATI Supervisor displays a message informing you of a successful script save and launch.

5.6.11. Action Usage Examples

The present section explains technique of usage of different actions.

Restore previous call attributes

You may need to restore attributes of a call which were removed in the result of some event. The Call Extended Status, Priority, User Assignment, the Time to Call and other call and interview attributes can be among them. This may happen, for example, when a call is assigned the "Returned Not Dialed" or "Returned Dialer Expired" extended status where calls are returned from a predictive dialer call queue.

Certain situations may require re-using these call attributes. The CATI Supervisor module provides the means to restore them and to automate this procedure.

There is an action called "Restore previous call attributes" which can be used to this end in the appropriate scheduling script . There is also a similar function that you can use in a custom script.

When a scheduling script action is used, all attributes of the calls which match the criteria specified in the scheduling script (by way of applying filters and adding the required action to the desired sub-rule) will be restored.

The same happens when you create and run a custom script containing the "Restore previous call attributes" function. The main difference from the scheduling script action is that custom script allows you to create more complex and versatile condition for executing the function or, in other words, more precise filters.

To restore call attributes using a scheduling script action

1. Create a new or start editing an existing scheduling script pertaining to the survey containing calls which attributes you are going to restore.
2. Pinpoint the desired rule or sub-rule you would like to add the "Restore..." action to. Pay attention to the sequence in which rules, sub-rules and sub-rule actions are executed - attribute restoring should be executed only for calls which require this action. Add the "Restore previous call attributes" action to the desired scheduling script sub-rule.

   You can create a filter for the action you add: this way you can specify the condition which the call should match for its attributes to be restored (this can be a particular extended status or any other parameter value which triggers the "Restore..." action).

   An example of the scheduling script using the "Restore previous call attributes" action is shown below.

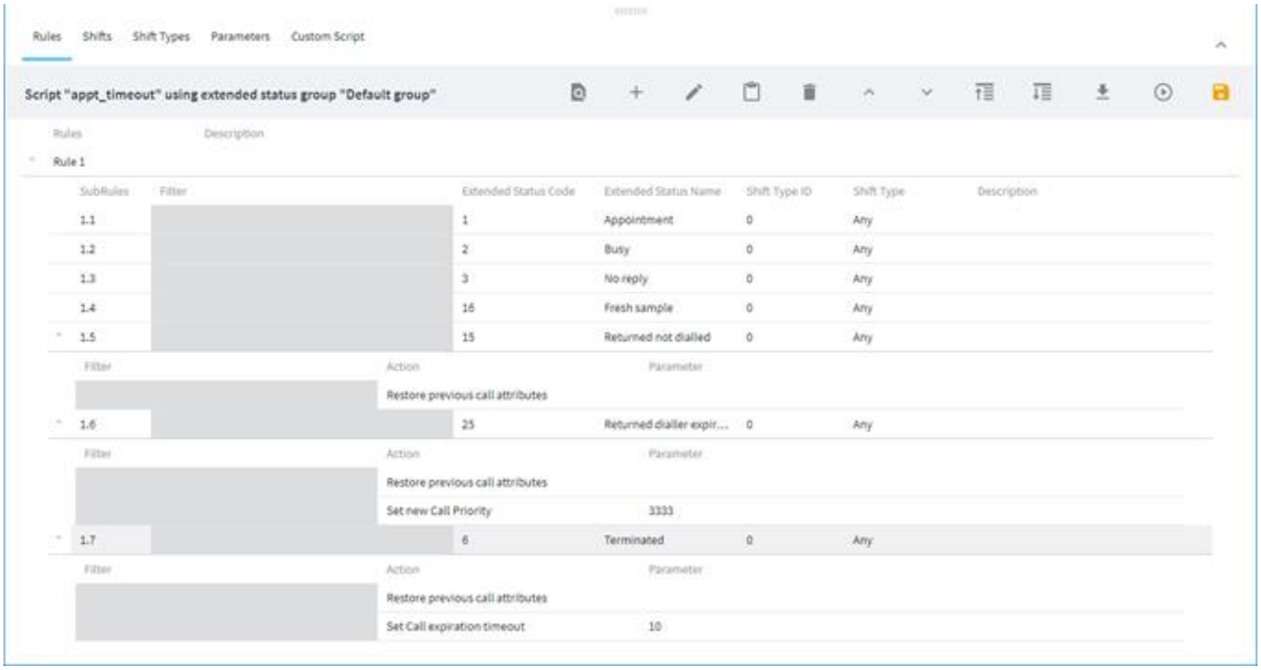


Figure 220 An example of scheduling script containing the "Restore previous call attributes" action

Pay attention to sub-rules 1.5, 1.6 and 1.7. All these sub-rules use the "Restore previous call attributes" action to restore attributes of calls after they were assigned different extended statuses. We can see that this action is applied to calls with "Returned Not Dialed", "Returned Dialer Expired" and "Terminated" statuses. You can also see that other actions will be applied to these calls after their attributes are restored: sometimes it is needed to tailor the restored call attributes for a new interviewing round.

3. The "Restore previous call attributes" action has no configurable parameters so you do not have to adjust anything else.
4. Save the scheduling script.

To restore call attributes using a custom script function

1. Insert the following code snippet at any possible place inside the custom script you are editing, and save this script. The custom script may consist of this function alone.

```
function MyFunction()
{
ExecuteAction(Actions.RestorePreviousCallState);
}
```

In the above example the function we have specified in the script is called "MyFunction".

2. Specify all the required conditions (appropriate variable names, other parameter values which will trigger the function execution) by adding them to the script.
3. Save the custom script.
4. Add the Run Custom Script action to the scheduling script. Specify the name of the function (MyFunction in the above example) as a parameter of the Run Custom Script action. See the picture below for an example.

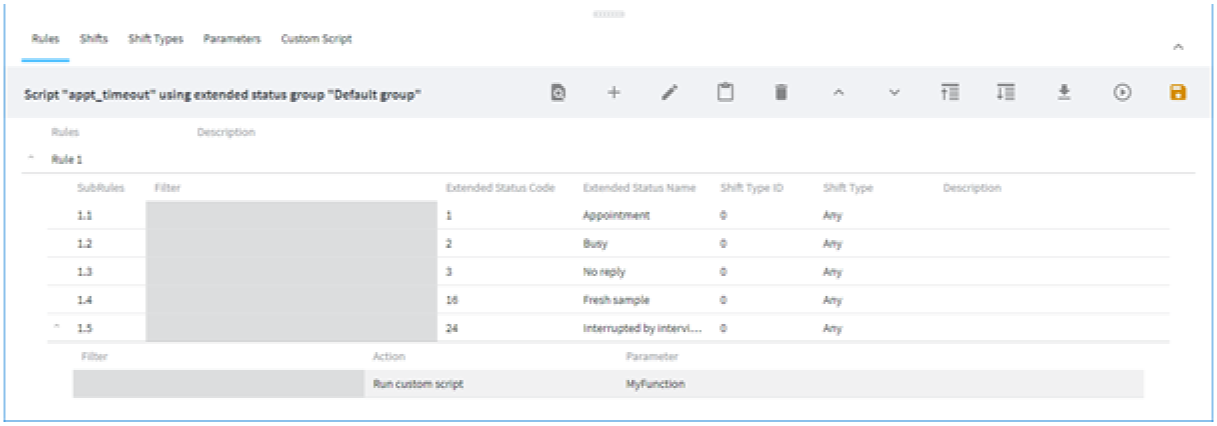


Figure 221 An example of the scheduling script containing a reference to the custom script

Pay attention to sub-rule 1.5. This sub-rule uses action which calls the custom script with the name "MyFunction".

5. Please take into account the sequence of rule, sub-rule and action execution - the Custom Script action which calls the appropriate custom script and executes the RestorePreviousCallState function should be specified for the appropriate sub-rule (all other existing rules/sub-rules/actions should be taken into account).

5.7. Importing the Scheduling Script Description

You can import a description of a scheduling script in the XML format. The file you are going to import can be located on any drive you currently have access to.

To import the scheduling script description in XML format:

1. Display the list of Scheduling scripts in the top right frame (refer to Viewing the List of Scheduling Scripts for instructions).

2. Click the Import button in the top right frame toolbar. This will display the dialog box which will allow browsing the files and selecting the one to import.

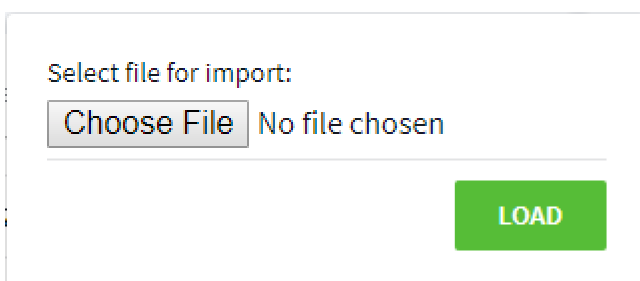


Figure 222 Selecting an XML description of a scheduling script for import

Enter the name and path to the file containing the scheduling script description in XML format, or click the Browse button to display the standard Windows Open File dialog box. Navigate to the file containing the description you want to import and click the Open button. The name and path to the file will appear in the Select file for import field.

3. Click the Load button.

The top right frame refreshes and, if the file is in the format suitable for use with the CATI Supervisor module, the scheduling script is added to the list displayed in the top right frame.

5.8. Exporting Scheduling Scripts

You can export descriptions of any existing scheduling script in XML format. This allows you to transfer scheduling script descriptions between different system installations and teams.

To export the selected scheduling script(s) description(s):

1. Select one or more scheduling scripts in the list in the top right frame by checking the appropriate boxes or click the required scripts keeping the **Ctrl** or **Shift** keys pressed to select a number of items.

   To deselect all the selected objects click the **Clear Selection** button in the top right frame.

2. Click the **Export** button in the top right frame toolbar.
3. A standard browser dialog box opens prompting you to choose what to do with the saved XML data.
4. Click the **Save** button.

   A standard Windows Save As dialog box opens. You can choose any available location for saving the file in XML format.

   If you click the **Open** button, the scheduling script definition in XML format is opened in the default XML application.

5.9. Deleting Scheduling Scripts

You can discard one or a number of existing scheduling scripts in case you do not need them anymore.

Deleted scheduling scripts are completely purged from the database and cannot be restored in future.

To delete the selected scheduling script(s):

1. Select one or a number of existing scheduling scripts in the grid in the top right frame. Multiple object selection is performed by checking boxes in front of the required object names in the grid in the top right frame.

   Alternatively you can click the required items keeping the Ctrl or Shift keys on the keyboard pressed to select a number of items.

   To deselect all the selected objects you should click the Clear Selection button in the top right frame toolbar. This will remove all ticks from the checkboxes.

2. Click the Delete button in the top right frame toolbar. The top right frame refreshes, and the Scheduling script list does not contain the deleted objects anymore.

5.10. Inbound Call Support using Scheduling Script

The CATI Supervisor module is able to handle inbound calls when it is connected to an integrated dialer which supports inbound call processing technology.

Inbound call processing technology relies on the DDI (Direct Dial-In) number list and also on a scheduling script which may involve specific functions and methods used in custom scripting to handle inbound calls.

The work of a dialer also has to be configured. Still most of dialer's functionality is handled in the background and supervisor usually is not required to touch any of these parameters.

When a call is created, the system runs a scheduling script which aim is to process inbound calls. This script should be created beforehand and should contain the "Accept Inbound Call" action. Other parameters for this script are optional.

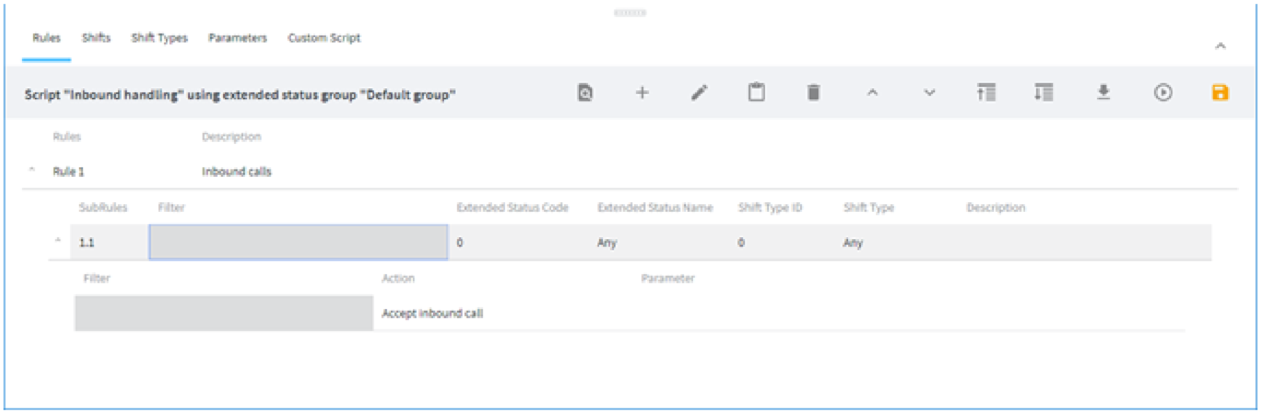


Figure 223 Example of a scheduling script for handling inbound calls

Calls have a special property called "CLI Number" (an identified telephone number from which the inbound call comes). It can be used in scheduling scripts to filter calls.

A scheduling script for accepting inbound calls can contain other rules and actions which help in processing an inbound call.

It is recommended to use the "Increment priority" action for inbound calls to forcibly increase the Priority value so that the call could be delivered to an interviewer as fast as possible. This is especially important when calls are delivered in the "non-Predictive" mode.

There is a range of extended statuses that are assigned to inbound calls when they are detected and as a result of different outcomes. These extended statuses can be used in scheduling scripts as filters for handling calls.

The CLI (Caller ID) of a calling respondent is a call parameter. It may also be used as a filter in scheduling scripts.

For details regarding management of inbound calls please read the following chapters:

- (go to Configuring Inbound Call Settings on page 364 for more information) - to learn about DDI number configuration;
- (go to General Procedure for Handling an Inbound Call on page 367 for more information) - for general information regarding support of inbound calls
- (go to On-hold Messages Played to Calling Respondents on page 369 for more information) - for details regarding configuration of the Default On-Hold messages.

Routing inbound calls through the use of a scheduling script

The CATI system provides a function that helps setting up a filter for a scheduling rule action that can route inbound calls.

The **Scheduling.DdiNumber** is a function that can be used in a scheduling rule for inbound calls that allows actions to be filtered based on the DDI number dialed to enter a survey (where more than one DDI number may be assigned to the same survey).

This example shows how to assign language groups dynamically based on the DDI number.

To instruct the system to route a calling respondent to the appropriate survey we should add (for example, one DDI number is intended for people who speak English language - they are to take an English language questionnaire, and another one - for people who speak French - they are to take a French language questionnaire. The English language questionnaire is associated with DDI number "12345" while the French lfanguage questionnaire is associated with DDI number "67890".

The supervisor should add the "Assign User/Groups" action twice to a corresponding scheduling script. Both actions should have the "Filter Enabled" option turned on!

The first added action should use the **Scheduling.DdiNumber** function telling the action should be applied to a respondent who dials a DDI number equaling '12345'. The Value for this action should be the ID of an interviewer or an interviewer group, "10" in this example, who is supposed to conduct interviews in English. If the system encounters the DDI number, it routes the call to a corresponding interviewer. An example of such an action is shown below.

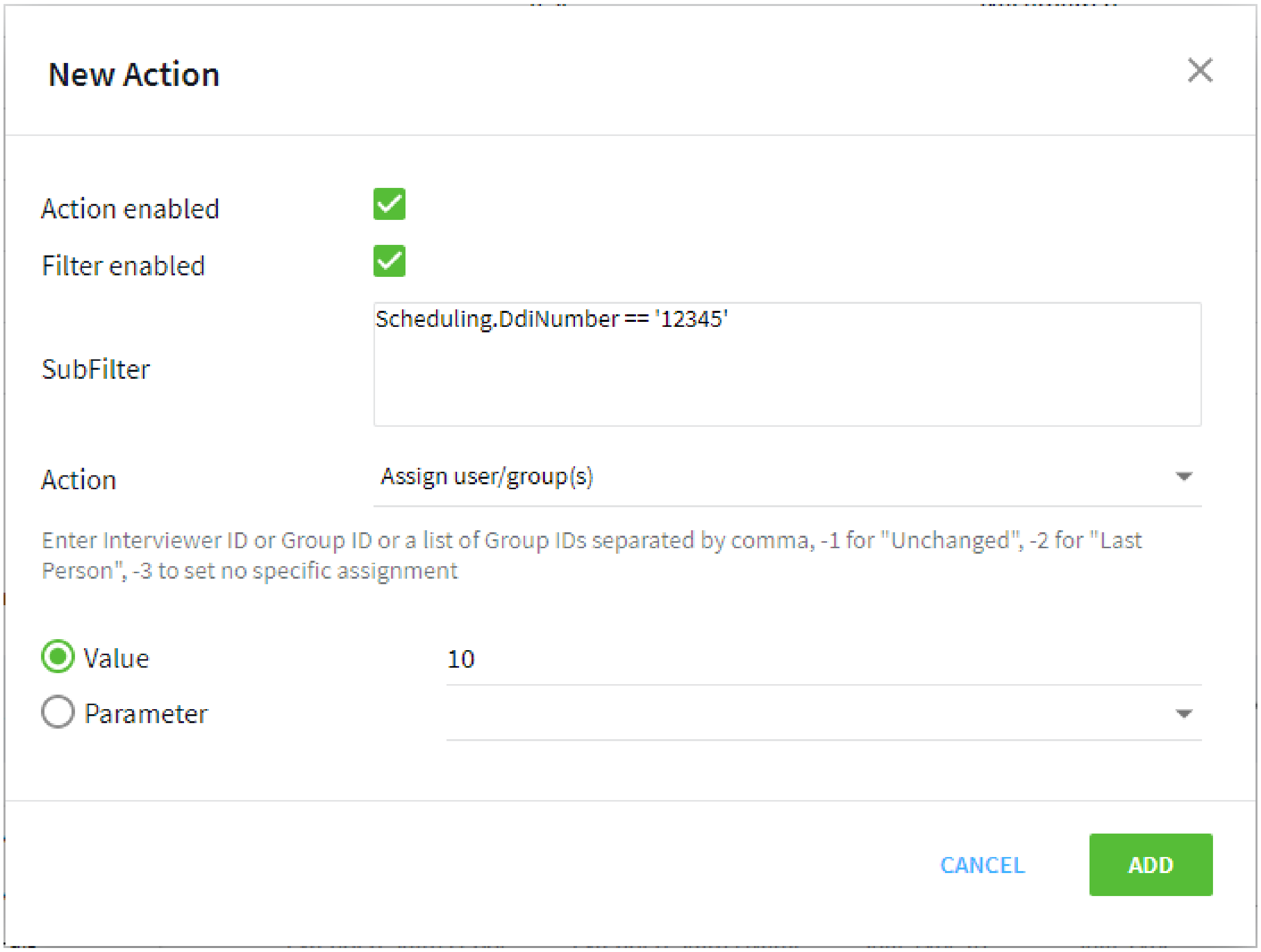


Figure 224 A scheduling rule action routing respondents based on a DDI number

The second action the supervsior should add should be applied to a respondent who dials a DDI number equaling '67890'. The Value for this action should be the ID of an interviewer or an interviewer group, "11" in this example, who is supposed to conduct interviews in French. An example of such an action is shown below.

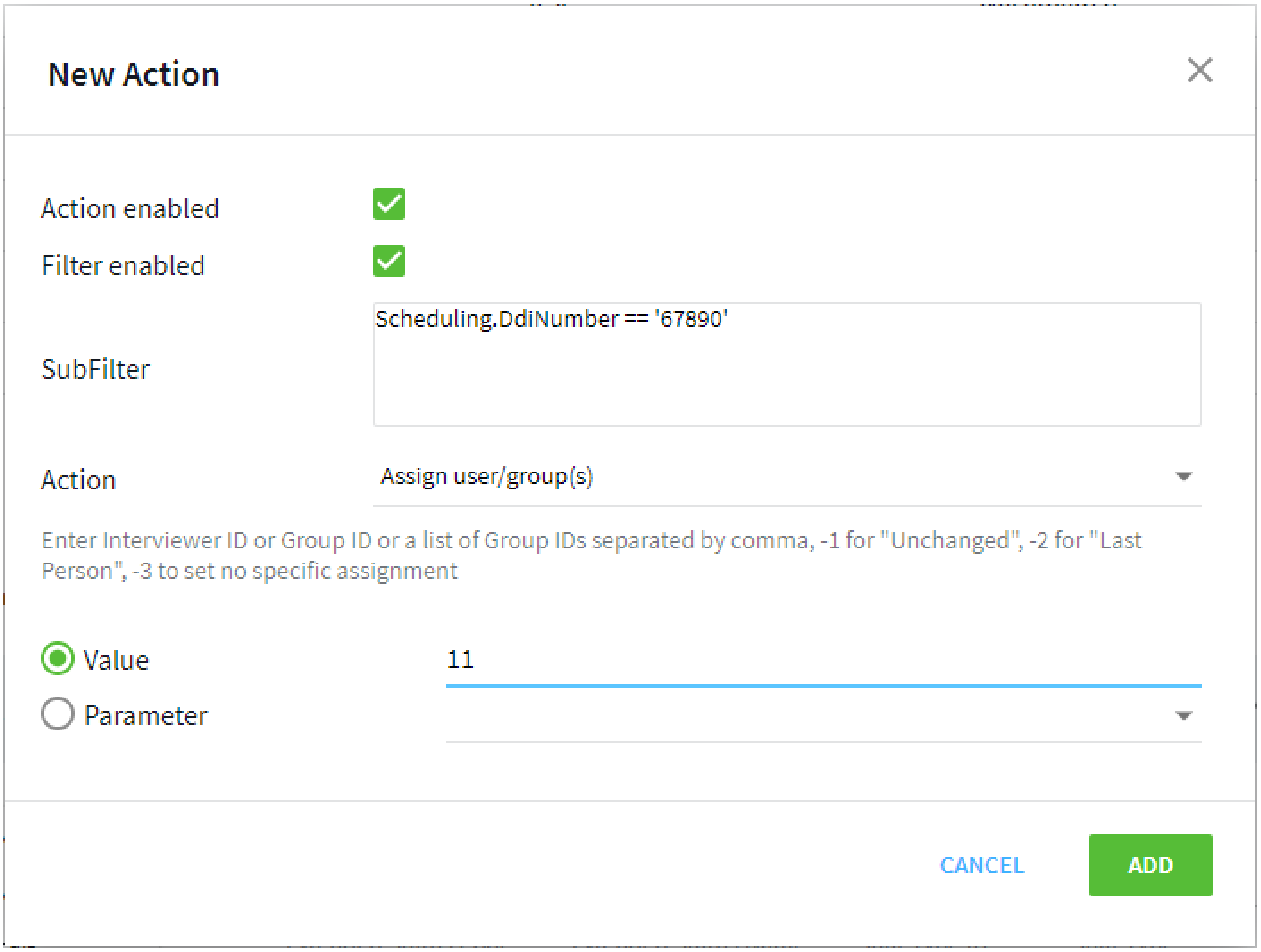


Figure 225 Another scheduling rule action routing respondents based on a DDI number

5.11. Extending Appointment Expiration Time for Explicitly Assigned Interviewers

The CATI Supervisor module makes it possible to set an appointment expiration timeout so that an appointment could still be delivered to a specified user while their session remains active even if they are busy when the appointment is due.

Normally, when an appointment is due but the assigned user is not free (not logged in or working on another interview), the system removes the explicit user assignment and changes properties of the call according to scheduling script rules. However, if the interviewer is known to be logged in, the supervisor can instruct the system to wait for some time without removing the explicit user assignment and changing properties of the call. The system will then wait for some time for the status of the interviewer to change. This is done by way of adding a sub-rule to a corresponding scheduling script.

A special function called `IsCallExpiredWithResourceLoggedIn` is used as a filter in the scheduling script sub-rule to this end. This function uses the "`(int timeout)`" parameter to set timeout for the call expiration time. This parameter accepts an integer value and it means "Timeout interval in minutes".

A more detailed description of the technique used to set up appointment expiration timeout can be found in the "CATI Administrator Manual".

When the timeout countdown starts, the system (in short increments of time) checks the status of the assigned user. If they become available, the system delivers the appointed call. When the timeout interval ends, and the status of the user does not change, or when they log out of the system, the current scheduling script changes the properties of the call according to the specified rules.

The illustration below shows a scheduling script configured to set a timeout for an appointment. The function parameter is set to "10" which means the system will be continuously checking the interviewer status for 10 minutes until they either become free to receive a call, or log out. In the first case the system delivers an appointed call to the interviewer, in the second case it will change properties of the call according to actions which are added to this scheduling script (see the picture below). The same change to the call properties will be carried out if the allotted 10 minutes run out and the unavailable status of the interviewer remains the same.

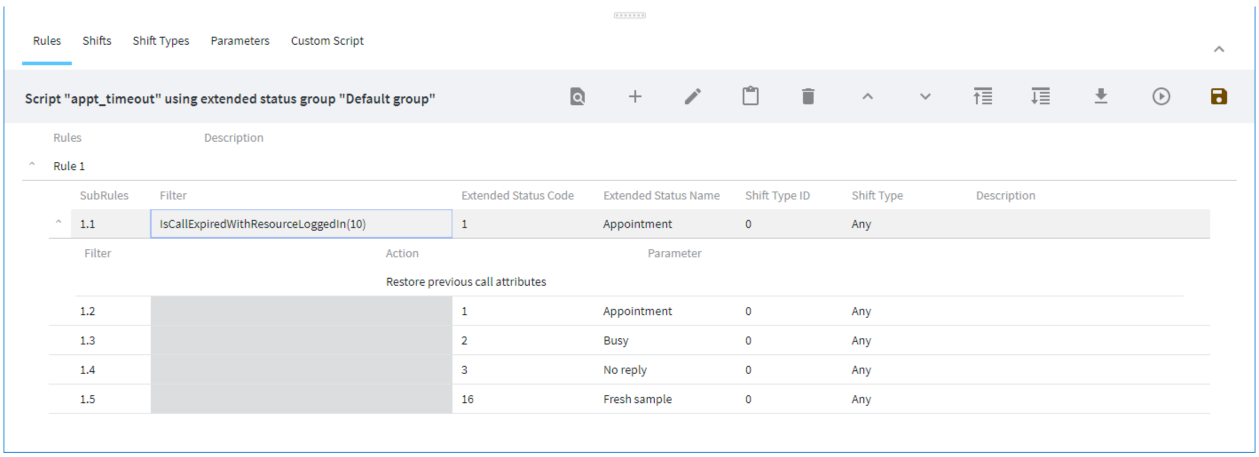


Figure 226 Scheduling script containing a sub-rule for setting appointment timeout

6. Interviewing

Interviewing can currently be performed using either the browser-based interface (which will work on any device with a recent version of the Chrome, Firefox or Edge browsers) or via the desktop-installed application (which will work on a supported Windows PC). The two application interfaces offer very similar functionality, however we recommend using the browser interface as this is based on a newer design and technology. Note that support for the desktop interface will be withdrawn in future, and moving forward, new features will only be added to the browser-based application.

To use the browser-based interviewer interface, interviewers simply need to log in. The login page opens when the interviewer goes to the **Resources > Browser Based CATI Console Link** option in the CATI supervisor interface.

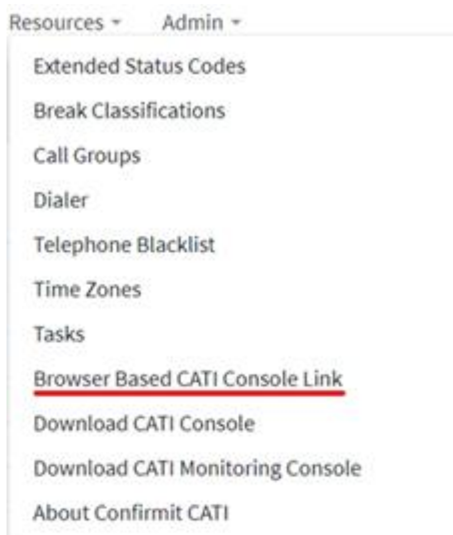


Figure 227 The Resources > Browser Based CATI Console Link option

Note: The site-wide security policy for interviewer login authentication can be administered by a CATI administrator by going to the supervisor Admin and then to Settings/Security. Interviewer access can also be disabled by locking their account in the Interviewer administration area of the supervisor UI. The same settings are applicable for both the browser based and desktop versions of the interviewing application.

The Interviewer's work is arranged and monitored by the supervisor. The Supervisor specifies the time intervals (shifts) when the interviews should be performed, assigns interviewers and interviewer groups to surveys and interviews, defines the Interviewing mode for them, and monitors their work. The Supervisor can also terminate an interview, and shutdown the whole survey, if required.

6.1. Downloading the CATI Console Installation Files

Note that the download and installation procedures described herein are performed on the same machine – you should always install the CATI Console on the same machine you have used to download the installation files.

Important!
This note is intended for users who work behind proxy. ClickOnce is the mechanism that is used for the CATI console installation. ClickOnce provides support for Windows Integrated proxy authentication. ClickOnce does not provide support for other authentication protocols such as Basic or Digest. Users who run the installation behind a proxy server where that proxy server uses Basic authentication will be presented with an error message stating that the URL cannot be reached as proxy authentication is required. Console installation and console running will therefore not work through a Basic authentication proxy server. For Basic authentication, the only solution is that the user allows for proxy by-passing, otherwise every time the URL is accessed the user will need to authenticate. Methods such as attempting to load another browser and authenticating there first, then loading the console, will not work. For further information regarding ClickOnce deployment, go to the MSDN website at http://msdn.microsoft.com/en-us/library/ms228998.aspx.

To download the CATI Console installation files:

1. In the Navigation menu go to the **Resources** section and choose the **Download CATI Console** command in the drop-down menu.

   The Download CATI Console dialog opens.

Figure 228 Fetching CATI Console download URL

2. Either choose the URL suggested in the dialog, or copy the URL into your clipboard and paste it into your browser.
3. Click the URL to open the browser at the appropriate download page.

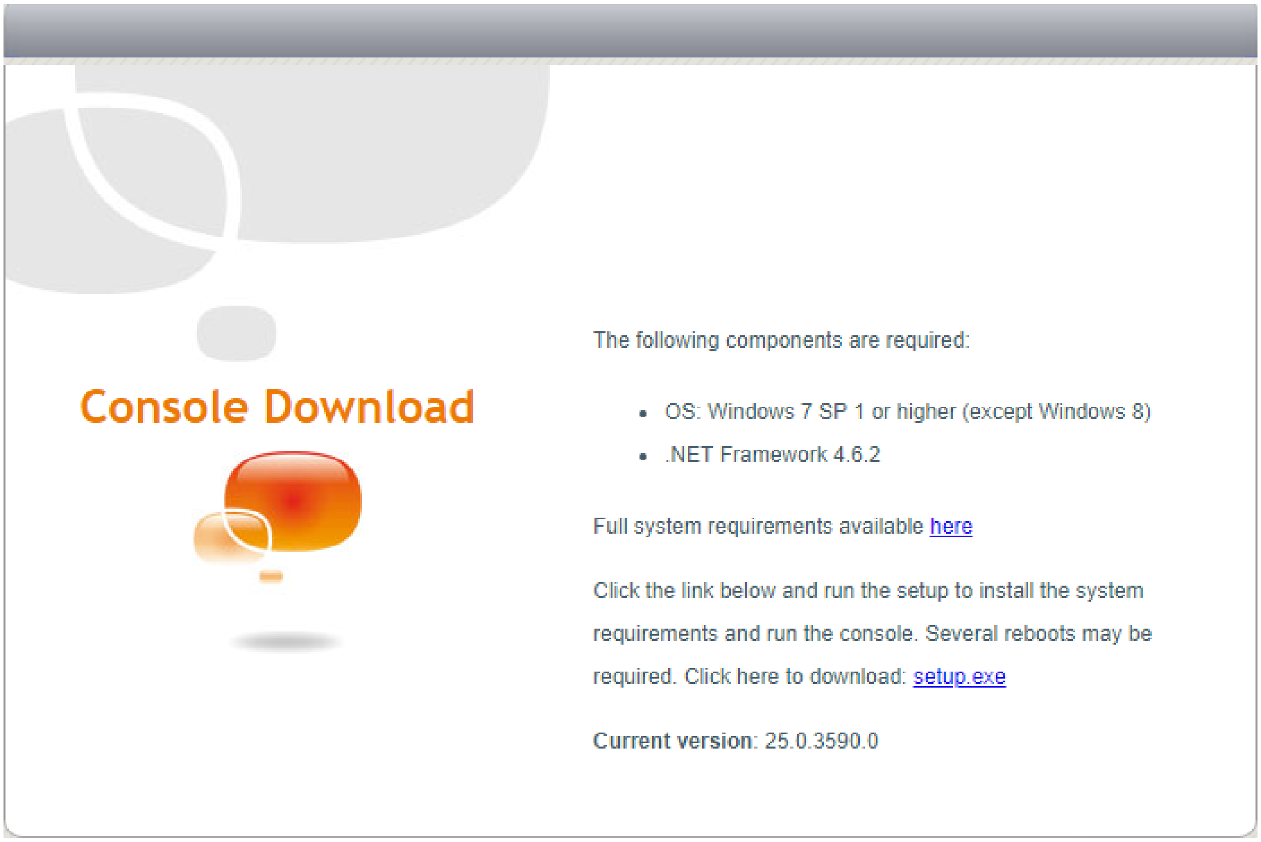


Figure 229 CATI Console download page

4. Click the link and follow the instructions to download the file.

   In case prerequisites mentioned in the dialog shown above are not installed on your machine, they will be downloaded and installed automatically prior to the Console installation. CATI Console installation procedure will commence right after all the prerequisites are successfully installed.

5. For instructions regarding CATI Console installation refer to Installing a New Copy of the CATI Console.

   CATI Console upgrade procedure is described in Upgrading the CATI Console.

6.1.1. Installing a New Copy of the CATI Console

To install a new copy of CATI Console:

Refer to the list of system requirements applied to a PC hosting Forsta software which can be found on the Forsta Extranet. Follow the appropriate requirements applicable to the machine on which you plan to install the CATI Interviewer Console software.

1. Log on to the console PC as the PC Administrator and start the installation file download procedure (see Downloading the CATI Console Installation Files for details).

2. Note that the CATI Interviewer Console GUI (Graphical User Interface) is localized automatically based on the locale language currently set up in your MS Windows operating system. If one of the locale languages from the list below is selected in your operating system, then CATI Interviewer Console is automatically downloaded with all GUI elements in the same language as it is currently selected in your operating system. For example, if Spanish is currently set as your locale language, the CATI Console is downloaded and installed with GUI elements localized in Spanish.

   The list of languages in which the CATI Console GUI elements are localized automatically includes:

- Albanian

- Arabic
- Bosnian
- Bulgarian
- Croatian
- Czech
- Danish
- Dutch
- French
- German
- Hungarian
- Italian
- Macedonian
- Norwegian
- Polish
- Portuguese
- Romanian
- Russian
- Serbian
- Slovakian
- Slovenian
- Spanish
- Swedish
- Turkish
- Ukrainian

   Should you need to change the GUI language localization in the CATI Console copy you have to first uninstall the CATI Console (go to Uninstalling the CATI Console Application on page 239 for more information) from your PC, then change the locale language in your operating system to the one you want your CATI Console to be localized in, and then rerun the download (go to Downloading the CATI Console Installation Files on page 234 for more information).

2. After file download is complete, a security warning message is displayed. You can view the software publisher's electronic certificate by following the corresponding link in the dialog.

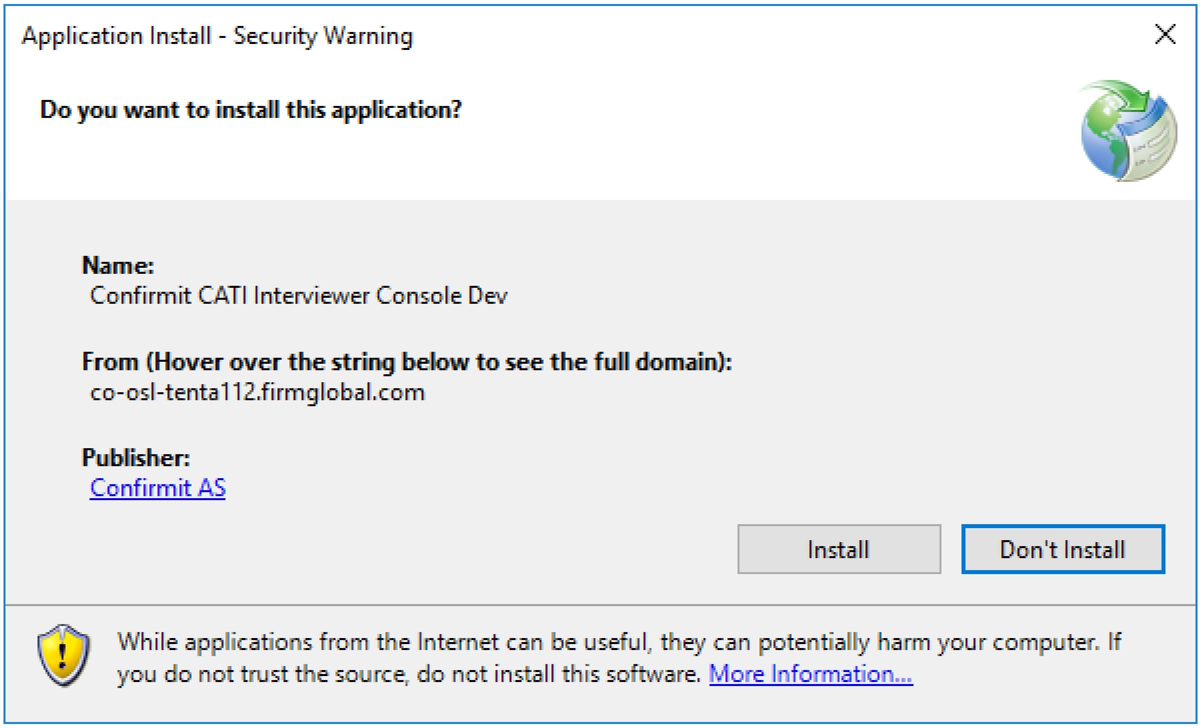


Figure 230 CATI Console security warning produced at the time of installation

To proceed with the installation choose the Install button.

3. The dialog with the progress bar showing the installation progress is displayed after the software installation starts.

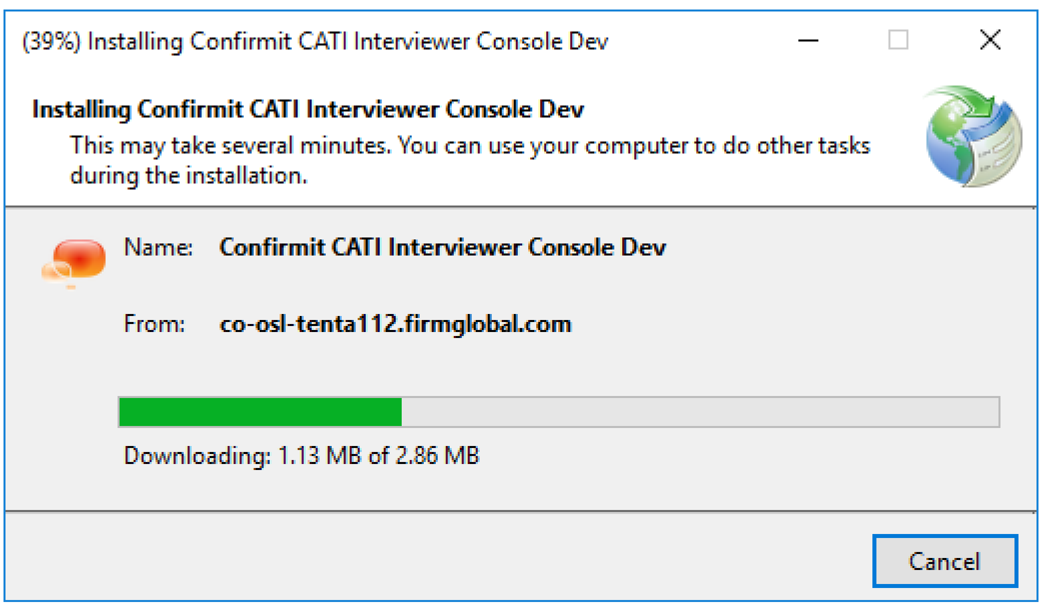


Figure 231 CATI Console installation progress

The CATI Console is installed into the default destination. You cannot change the installation path.

Note that the default paths to the CATI Interviewer log file and the CATI Interviewer configuration file (settings.config) are as follows:

- For CATI Interviewer Console installed on MS Windows 7 operating systems:

  C:\ProgramData\Confirmit\CATI\

4. CATI Console starts automatically when the installation procedure finishes successfully. This will display the CATI Console Log In screen. You can either log in (see Starting the CATI Interviewer Console and Logging In for details), or close CATI Console by pressing the cross button in the top right corner of the Log In screen.

6.1.2. Upgrading the CATI Console

The CATI Console will be upgraded automatically the first time you run it after the application has been upgraded on the server. The files are copied on your PC and the console is enabled for CATI operations.

6.1.3. Uninstalling the CATI Console Application

In the event you need to completely remove the CATI Console application from a PC, perhaps prior to performing a fresh installation, proceed as follows:

1. Go to the Windows Control Panel menu and open the Programs and Features application.
2. Browse the list of programs, locate the **CATI Interviewer Console** application and choose to uninstall it.
3. Follow the instructions provided and complete the procedure.

6.2. The CATI Interviewer Console QUICK REFERENCE

Below is a short description of all options and control elements you will find in the CATI Interviewer Console interface. Please bookmark this topic and use it whenever you have a question regarding the use of any Console option.

Survey/Interview selection screen

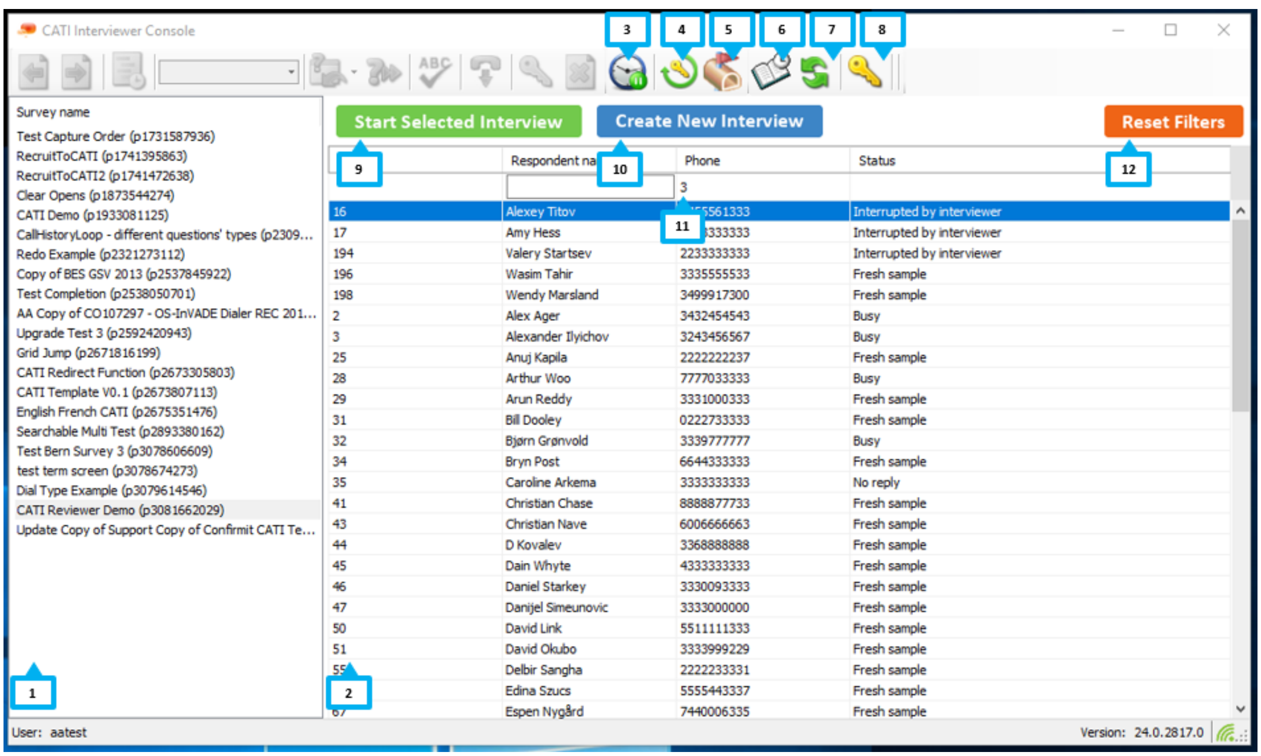


Figure 232 Survey/Interview selection screen

1. List of assigned & opened surveys
2. List of contact records (for the currently selected survey)
3. Initialize break
4. Change call delivery mode
5. Show supervisor messages
6. Show personal appointments
7. Refresh lists
8. Logout
9. Start interview for the currently selected contact
10. Create a new contact record and start the interview
11. Enter filter values
12. Clear any existing filter values

Interview page

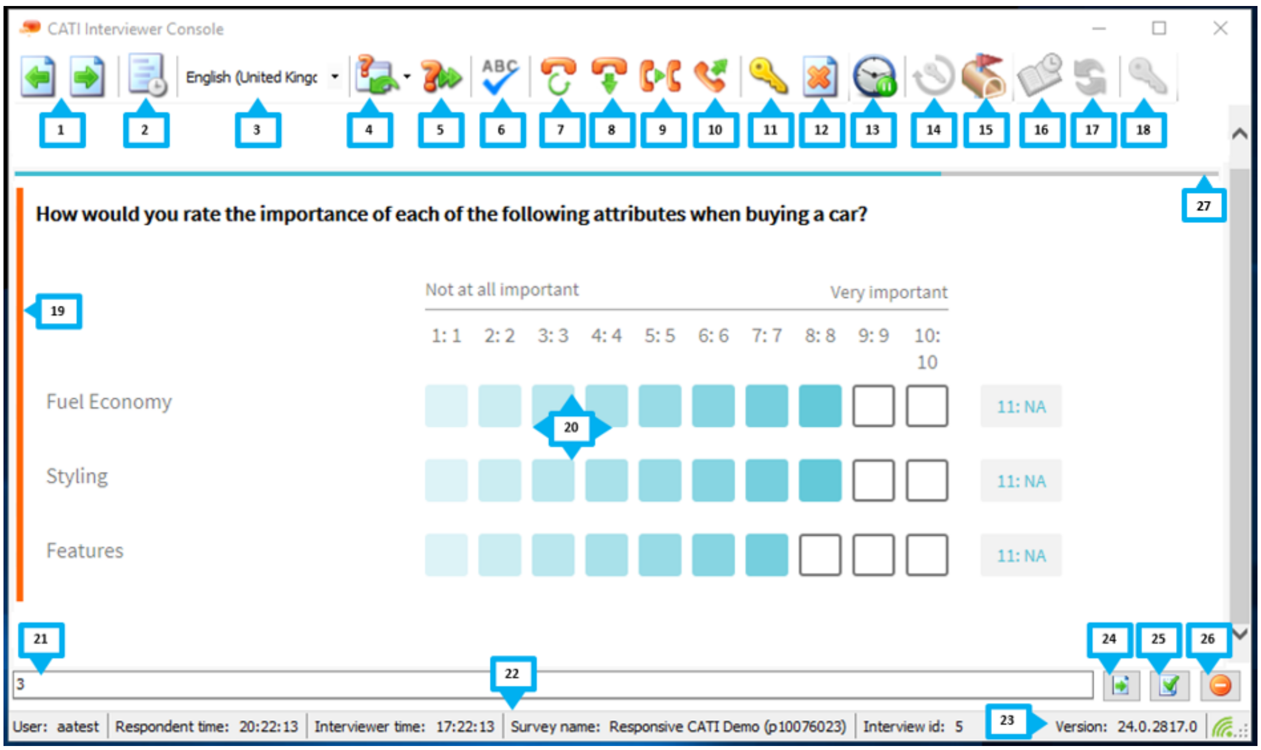


Figure 233 Interview page

1. Screen navigation
2. Set a call back appointment
3. Select questionnaire language
4. Return to a previous question
5. Fast forward to next question
6. Spell check the text response

7. Open redial menu [on supporting dialers only]
8. Drop respondent connection [on supporting dialers only]
9. Open internal transfer menu [on supporting dialers only]
10. Open external transfer menu [on supporting dialers only]
11. Logout after current call
12. Terminate call
13. Break after current call
14. Change call delivery mode
15. Show supervisor messages
16. Show personal appointments [on manual selection screen only]
17. Refresh list [on manual selection screen only]
18. Logout [on manual selection screen only]
19. Active question indicator (for keyboard inputs applied in the keyboard entry area)
20. Question area
21. Keyboard entry area
22. Status information
23. Console version and connection quality
24. Submit response (navigate to next screen)
25. Apply default answer [only available if set up in the survey]
26. Apply refusal answer [only available if set up in the survey]
27. Survey progress indicator (optional)

6.3. Starting the CATI Interviewer Console and Logging In

1. Start the CATI Interviewer Console application by choosing Forsta CATI Interviewer Console in the Forstagroup in the Windows Programs menu.

   The Station ID dialog opens.

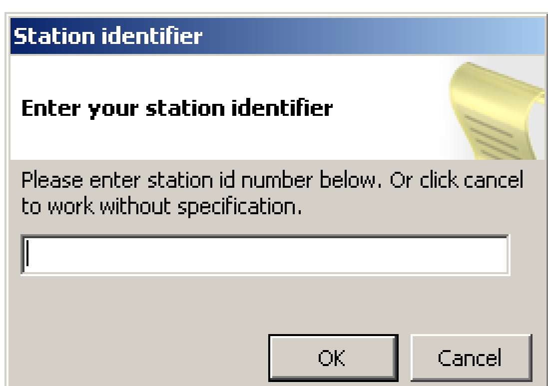


Figure 234 Entering the Station Identifier

2. Enter the unique ID assigned to this particular interviewer.

   The ID format used is: <Name><Number><Type>, where:

o'Name' is information about the interviewer's station. It can contain only characters and is limited to eight characters.

o'Number' can contain only digits and is limited to six characters. If a dialer is used then it is a 'Dialer number', which is encoded using the following rule: the first digit determines the dialer, the next five digits determine the extension number (for example range 0-99999 means the first dialer, range 100000-199999). If a dialer is not used then this part can be omitted.

o'Type' defines the dialer type and is limited to one character only. For a local station this should be "L", for a non local station this part should be omitted.

Normally the Station ID is provided by the supervisor and it cannot be changed. When the interviewer logs in to work with the CATI Interviewer Console for the first time, he/she should enter the Station ID and click **OK** to submit it. The CATI Console will display a warning message if the entered ID format is incorrect. The number is stored by the system, and when this interviewer starts the console and logs in the Station ID dialog will be displayed with the station ID pre-entered and inaccessible for editing.

If a situation arises where the Station ID must be changed, when the Station ID dialog appears at login time press **Alt+S** on your keyboard. The Station ID field is then opened for editing.

In the event the administrator does not assigned a station ID to an interviewer, the Station ID field may be left blank and you can simply click **OK** to proceed with the log-in procedure.

After the submitted Station ID is successfully verified, the CATI Interviewer Console displays the login screen.

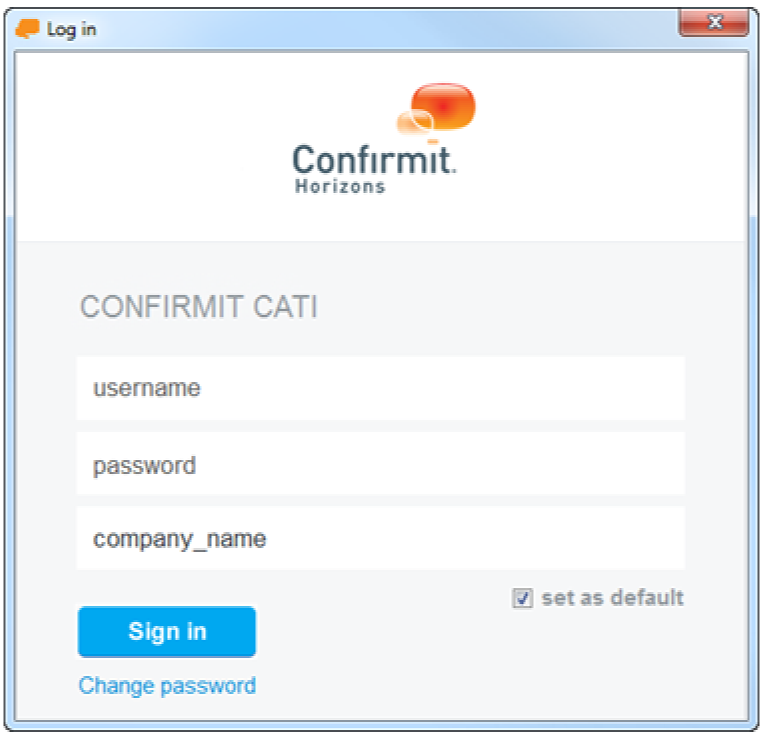


Figure 235 The CATI Console login dialog

3. Enter your credentials into the Username and Password fields in this dialog, then specify the name of the company.

   Check the Set as default box if you want to set the company name as default so it appears each time the CATI Console starts, thereby saving time.

4. On completion, click **Sign In**.

   The situation may arise where a password has expired when the interviewer tries to log in. The Interviewer console then displays the 'change password' message.

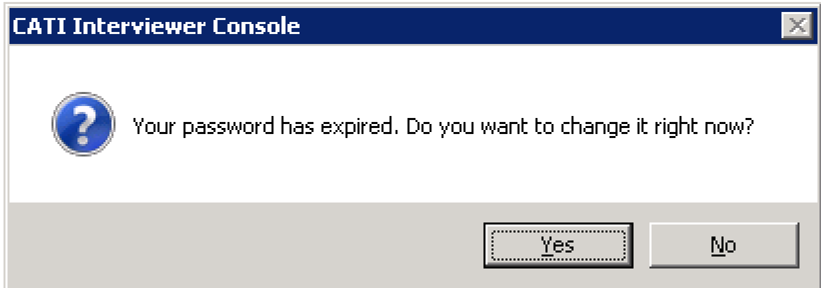


Figure 236 Interviewer password expiration warning

Click **No** if you do not wish to change the password at this time. The warning message will close and the regular Login dialog will open.

To update the password click **Yes**, the password change dialog opens.

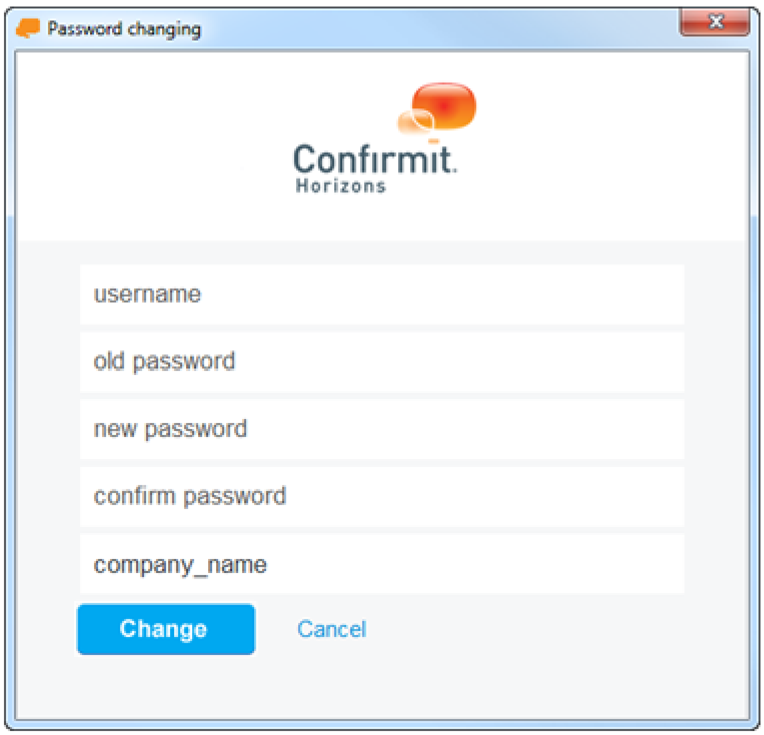


Figure 237 The change password dialog

You must supply your current credentials, and then enter your new password in both the New password and Confirm password fields. Set the company name if required. On completion click **Change**. The system validates the fields, and assuming everything is correct the password is changed, the dialog closes and the login dialog reopens. The interviewer must enter the newly supplied credentials to log in.

In the event an error is registered, an appropriate message is displayed. You must then close the error message and edit the required field contents to continue.

If you click **Cancel**, the dialog closes and the Login dialog is displayed.

Note that you can change your password at any time by choosing the **Change password** option in the Login dialog.

If the CATI Console window is closed while an interview is in progress, for example your PC is switched off for some reason, you will not be logged out until a time-out period has elapsed. If you then restart the console before the session times out, you will be pushed back into the incomplete interview at the first unanswered question, regardless of the assigned Interviewing mode. However the supervisor can terminate the interview using the appropriate control in the Interviewer List window. In this case, when you log in again you will not be taken back to the incomplete interview but will be able to select a different interview in the assigned Interviewing mode.

The login procedure validates the current time on the interviewer PC launching the console. If the time is incorrect or the PC is in an incorrect timezone, login will fail and the following message will be displayed.

Figure 238 Warning message displayed if the interviewer computer system time does not correspond to the UTC

To correct the situation, contact the supervisor or adjust the system clock on your computer by connecting to any Internet Time Service server and performing the synchronization procedure provided by that server. After the system clock is adjusted you will need to repeat the login procedure.

If you are already logged in on one Interviewer Console and attempt to log in from another console, you will receive the following message.

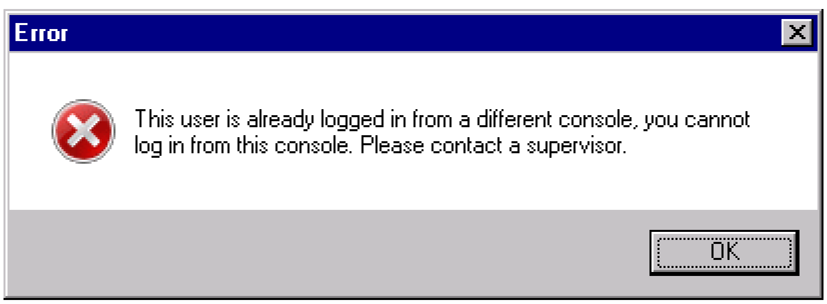


Figure 239 Warning message displayed when the interviewer performs multiple login

Note that if the second console has the same Station ID, or if the Station IDs are both blank, then you will not receive any message and will be permitted to log in.

If your company uses a dialer, the Dialer log in dialog now appears, otherwise this step is omitted. Here you can select whether you wish to use the dialing system or whether you wish to dial manually.

The figure below shows the Dialer log in dialog displayed for the interviewer who has already logged in, and who is working on a Local station with the dialer which stands first in the list.

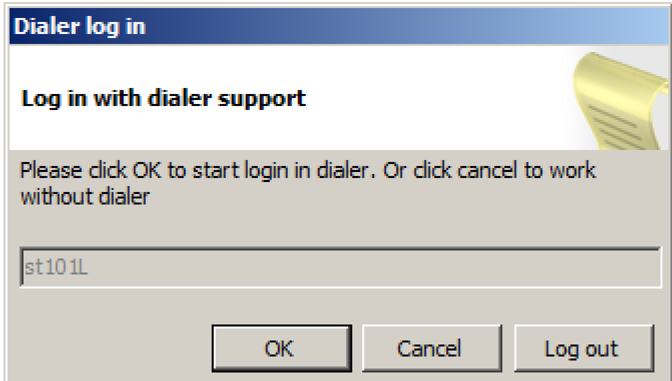


Figure 240 Logging in with or without dialer support

The field in this dialog contains the station ID that was entered at the start of the login procedure, and this cannot be edited. Three options are available:

- Click **OK** to initiate connection with the dialer (this dialer is identified using the supplied station ID) and start the CATI Interviewer Console with the dialer support.
- Click **Cancel** to start the console without the dialer support.
- Click **Log out** to close the session.

When the CATI Console application identifies the interviewer, the Telephone number dialog opens.

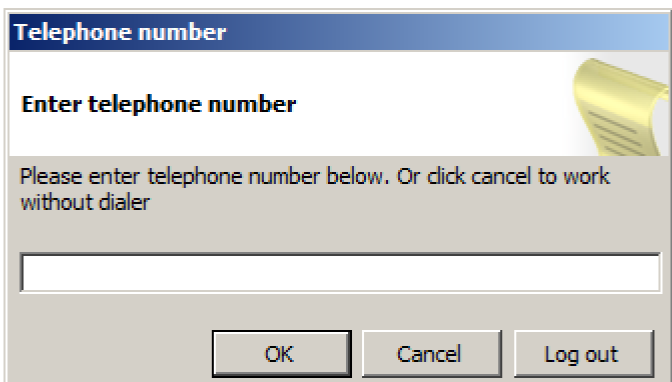


Figure 241 Entering the telephone number for work with the Dialer

5. Input the telephone number which is to be used by the Dialer. This must be the number of the telephone which you will use to conduct interviews.

Note: All the digits in the telephone number must be entered together as a single line, without spaces or other symbols in between.

The last number that was entered in this field and dialed by the dialer system is stored and will be shown the next time the Telephone number dialog is displayed. You can either submit this number to the dialer again or edit it before submitting.

6. Click **OK** to start the interviewing session and commence communication with the dialer, or click **Cancel** to perform all the dialing manually.

The difference between two methods for the interviewer is as follows - when the dialer is being used all the calls designated for this interviewer are connected automatically in the order specified by the survey parameters (dialing mode) and determined by the Interviewing mode which was assigned to the interviewer by the supervisor. In this case the interviewer only hears the next call connected and sees the corresponding interview questions displayed in the CATI Console.

If the interviewer chooses not to use the dialer, he/she dials manually. The order of the numbers to be dialed is determined by the current Interviewing mode, and the dialing results are not processed automatically.

After the successful login the CATI Console will display an interface depending on the Interviewing mode specified for the current interviewer, and on whether the dialer was used.

Read Selecting a Survey/Interview and Logging Out and Closing the CATI Console Window for information on how the work is organized in every Interviewing mode, provided the dialer was or was not used.

Interviewer’s actions in the CATI Console which is displayed after successful login vary depending on the Interviewing mode this interviewer must work in.

Refer to Selecting a Survey/Interview and Interviewing Procedures for further information how the work in the CATI Console is organized.

6.4. The CATI Console User Interface

The CATI Console window contains a toolbar with the button set at the window top, the work area, occupying the main window space, and a status bar in the bottom.

Depending on the Interviewing mode specified for the current interviewer the CATI Console may start with displaying:

- a Survey/Interview list in the work area;
- a Survey list in the work area;
- an Interview Question in the work area.

The picture below shows the CATI Console displaying a Survey/Interview list in the work area.

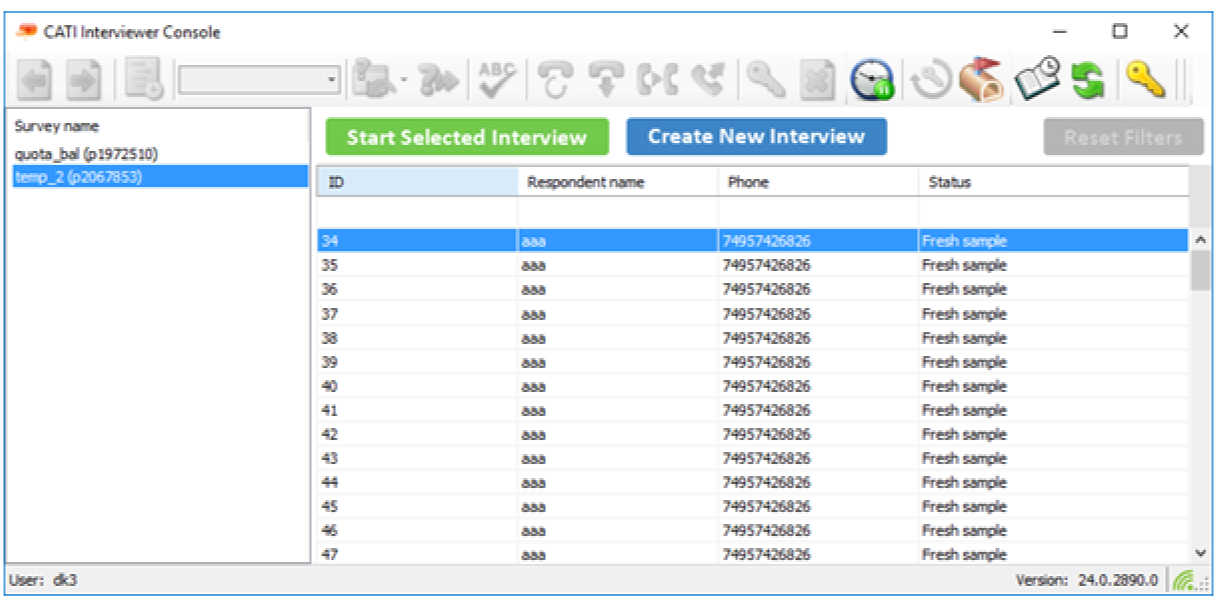
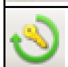
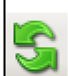
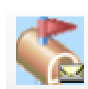


Figure 242 The CATI Console - Survey/Interview selection area

Note that an Interview list displays only a set number of sample records (this is a system setting specified by a system administrator). To select a record which is not displayed (yet exists in the sample) you should enter the Interview ID in the filter field (or use another property to apply a filter to) - this will display the required record. See instructions below on how to reset applied filters quickly.

Six buttons in the right part of the toolbar are available in this case. Some of these buttons are available only in this situation, and they are disabled (except for the Messaging and Take a break buttons) when an interview is started.

Button	Description	Function
	TAKE BREAK	Allows temporarily halting the work, but only in selection mode, not while the interview is in progress - see (go to Interviewer on a Break on page 272 for more information) for details.
	CHANGE LOGIN TYPE	The toggle button. When enabled it allows changing the Interviewing mode after the current interview is finished. Available only when the Dialer is not in use. See (go to Choice Mode on page 257 for more information) for details.
	MESSAGING	Displays the Messaging dialog box
	SHOW MY APPOINTMENTS	Displays the list of appointments in a separate window
	REFRESH	Updates the survey/interview list
	LOGOUT	Allows logging out of the current session. Closes the CATI Console window.

The Messaging button will change its appearance to  when an unread message is available for the interviewer (go to Viewing Messages on page 250 for more information).

The left pane in the Survey/Interview area shows the survey list. When the interviewer chooses a survey in the left pane (this choice is available with the Manual Interviewing mode only), the list of interviews for the current survey is displayed in the right pane.

The Status bar will display only the Interviewer name.

A survey and an interview list will show only surveys and interviews assigned to the current interviewer.

Another picture shows the CATI Console displaying an interview page in the work area (actual layout of interview pages may vary).

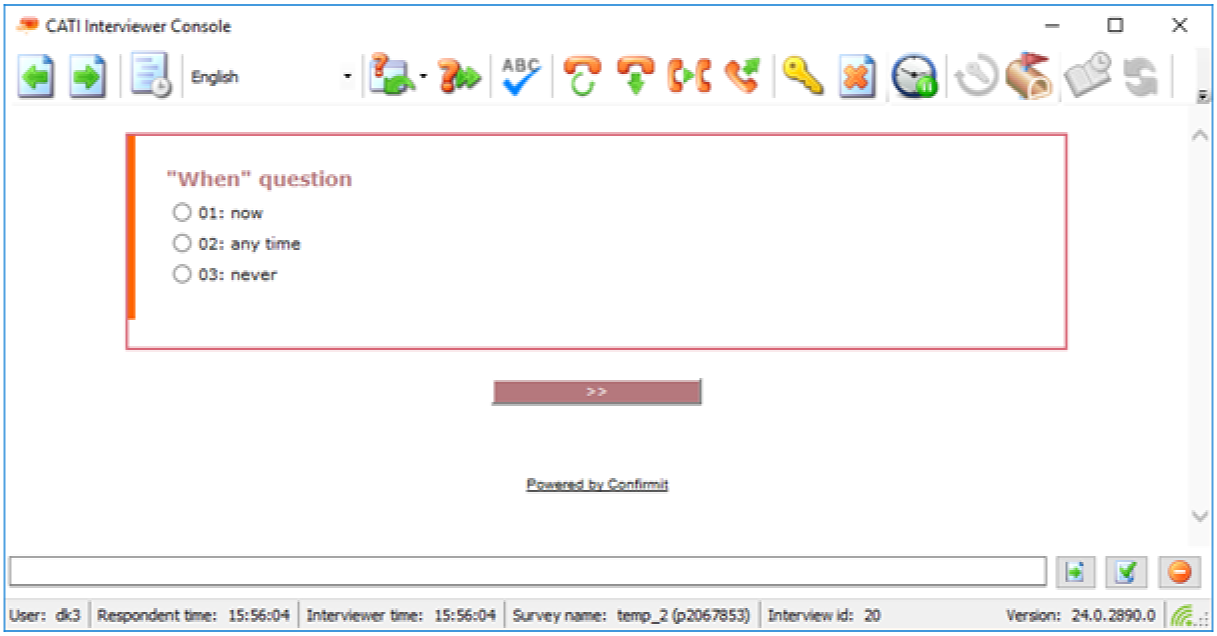
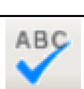
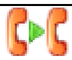


Figure 243 Interview question displayed in the work area

The available button set on the toolbar in this case contains the following buttons.

Button	Hot key combinations	Description	Function
	Ctrl+Backspace, or PgUp	PAGE BACK	Takes you to the previous question page, and submits the current page
	Enter, or PgDn	PAGE FORWARD	Takes you to the next question page, and submits the current page
	Ctrl+A	APPOINTMENT	Allows making an appointment. Displays the Appointment dialog.
Drop-down list	none	Interview language choice	Allows selecting interview language from those available
	none	REDO	Allows choosing already completed interview question and modifying the submitted answer variant.
	Ctrl+Enter	FAST FORWARD	Takes you to the last interview question.
	F7	CHECK SPELLING	Invokes the "Spell Check" dialog. Allows to check spelling of all "free text" answers on the current interview page.

		REDIAL	When pressed, this button invokes the Redial dialog allowing either to redial the current number or dial the number which can be entered manually. This button becomes available in certain situations only (go to The Redial Functionality on page 288 for more information).
	Ctrl+H	HANG UP THE RESPONDENT LINE	Hangs up the respondent phone line. Available only when the dialer is in use.
		INTERNAL CALL TRANSFER	Available only if this functionality is enabled in the CATI Supervisor module. Initiates call transfer to another agent in the same company. Displays the "Internal Call Transfer" dialog showing the list of interviewer groups to which the call transfer can be made (go to Internal Call Transfer on page 276 for more information).
		EXTERNAL CALL TRANSFER	Initiates call transfer to an external (third party) telephone number. Displays the "External Call Transfer" dialog showing the list oftelephone numbers to which the call transfer can be made (go to External Call Transfer on page 282 for more information).
	Ctrl+Q	LOG OUT (AFTER THE CURRENT INTERVIEW)	The toggle button. When enabled it triggers log out command after the current interview is finished.
	Ctrl+X	TERMINATE THE CURRENT INTERVIEW	Abandons the interview in progress.

Note: A set of hot key combinations can be used instead of buttons to enable the user to move through interview questions and answer selection. Refer to (go to Keyboard Support in the CATI Interviewer Console on page 268 for more information) for a description of the keyboard functionality, and to Appendix C - List of Hot-Key Combinations used with CATI Interviewer Console for a list of the hot key combinations that are available.

The left pane in the Survey/Interview area shows the survey list. When the interviewer chooses a survey in the left pane, the list of interviews for the current survey is displayed in the right pane.

There are buttons below the toolbar that appear only when the interviewer works in the Manual Selection mode (not available in any other work mode): they allow for starting a selected interview, creating a new one and resetting filters applied to the interview list.

Start Selected Interview	BEGIN AN INTERVIEW FOR THE SELECTED RECORD	Only available when a record is selected in the list of respondents. The button starts an interview for this record.
Create New Interview	CREATE A NEW RECORD AND START A NEW INTERVIEW	Only available when a corresponding option is enabled in the Professional Authoring module. Starts an interview when there is no corresponding record in the sample and creates a new record in the sample.
Reset Filters	RESET FILTERS	Only available when at least one filter is applied to the record list. When pressed, resets ALL applied filters and reveals the record list.

The Status bar displays the following information:

- Interviewer name

- Current respondent time
- Current interviewer time
- Current survey name and ID
- Current interview ID

Contents displayed in the work area normally would include the question text and answer variants, but the actual layout and formatting is determined by the template which is used to display interview pages (this template is created beforehand by the survey author using the Professional Authoring module). Two buttons (Back and Forward), usually positioned below the answer variants, allow you to move through interview pages.

Besides the question text and answer variants the work area may display prompts, warnings and other messages which guide the interviewer.

A keyboard entry box and the corresponding button set are displayed in the bottom of the work area (go to Keyboard Support in the CATI Interviewer Console on page 268 for more information).

The keyboard entry box is used:

- to select an answer by typing its precode;
- to enter the answer text manually (in case the chosen answer uses the "Open text", or similar field which accepts keyboard entry).

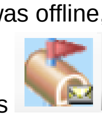
Buttons located to the right of the keyboard entry box allow for the following:

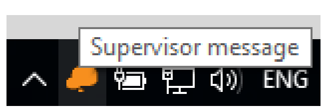
- Enter button  - submits the text entered into the keyboard entry box;
- Default answer button  - chooses the "default" answer variant;
- Refused answer button  - chooses the “refused” answer variant.

6.5. Viewing Messages

An interviewer can receive messages from the supervisor in two situations:

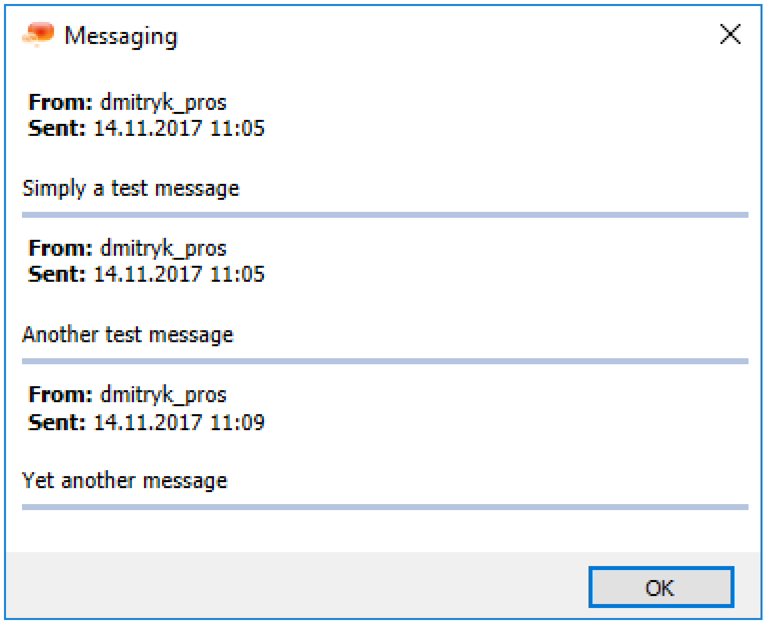
- upon successful logging into CATI Interviewer Console;
- while working with the Console.

In case the interviewer logs in and there is a message that was sent to him while he was offline, the CATI Interviewer Console starts with the Messaging button slowly flashing in the toolbar looking like this . In case interviewer receives a message while he/she is working with the Console, the Messaging button changes the way it is described above, and also he will notice the Messaging icon and a pop-up message in the system tray. It will look somewhat like this.



To view the Supervisor message:

1. Either click on the Messaging button in the Interviewer Console toolbar, or click on the pop-up message when it appears in the system tray.
2. Both actions will display the Messaging dialog.



3. The Messaging dialog will display all messages viewed by the interviewer during the current Console session. Use the scroll bar on the right side of the Messaging window to see all messages if they do not fit into the window.
4. Click OK to close the Messaging window.
5. All messages sent to an interviewer during one Console session are deleted when this session ends. Messages received during the time the interviewer was offline can be viewed after the interviewer logs back in.

6.6. Viewing the List of Appointments

The interviewer should keep an eye on the appointments the Supervisor assigns to him. This task is accomplished with the help of the Interviewer Appointments window which displays the complete list of appointments.

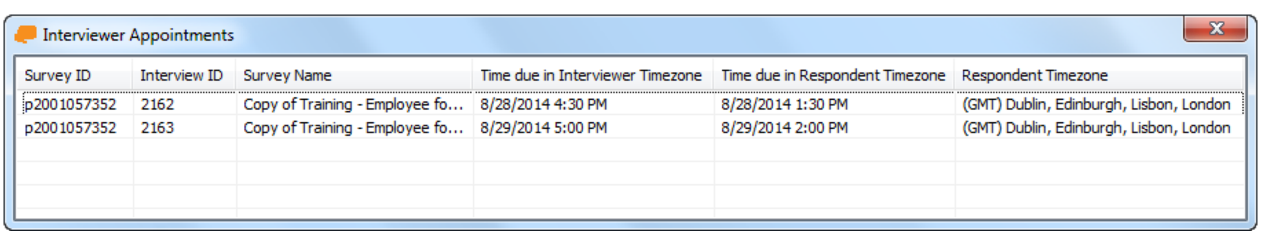
The Interviewer Appointments window shows surveys with interviews for which appointments exist. It also indicates the time on which the appointment is due (or was, in case it is currently overdue).

Appointments are displayed in the list in that window until they expire, or until they are removed by the supervisor.

To view the list of appointments:

1. When you are selecting an interview in either Survey Selection or Manual Interviewing mode click the Show My Appointments button  on the toolbar.

   This will display the Interviewer Appointments window.



Survey ID	Interview ID	Survey Name	Time due in Interviewer Timezone	Time due in Respondent Timezone	Respondent Timezone
p2001057352	2162	Copy of Training - Employee fo...	8/28/2014 4:30 PM	8/28/2014 1:30 PM	(GMT) Dublin, Edinburgh, Lisbon, London
p2001057352	2163	Copy of Training - Employee fo...	8/29/2014 5:00 PM	8/29/2014 2:00 PM	(GMT) Dublin, Edinburgh, Lisbon, London

Figure 244 The Interviewer Appointments window

2. The Interviewer Appointments window displays the following information about appointments:

- Survey ID – ID of the survey containing the interview for which the appointment was made;
- Interview ID - ID of the interview for which the appointment was made;
- Survey Name – the name of the survey containing the interview for which the appointment was made;
- Time due in Interviewer Timezone – the time (in Interviewer Timezone) on which the appointment is (was) due;
- Time due in Respondent Timezone – the time (in Respondent Timezone) on which the appointment is (was) due;
- Respondent Timezone – the Respondent Timezone name.

  The Interviewer Appointments window only provides information regarding the appointments, no actions can be performed in that window.

3. Click the cross button in the top right corner of the Interviewer Appointments window to close it.

6.7. Selecting a Survey/Interview

On successful login, depending on the interviewer's choice, the CATI Console may or may not use the dialer system in processing calls (see Starting the CATI Interviewer Console and Logging In for instructions on engaging the Dialer).

In case the interviewer chooses not to use the Dialer they have to dial the required telephone numbers manually (particular dialing procedure depends on the equipment type used to connect calls).

When the Dialer is used all required interview calls are delivered to the interviewer already connected - he/she does not have to dial manually. You should note that interviews are always delivered to the interviewer according to the dial mode specified for the survey (see Dialer for details on dialing modes). The interviewer always operates in one of the Interviewing modes specified for him by the supervisor. The Interviewing mode is the way in which the interviewer can select the interview - he is either free to choose any interview, or he can only select a survey, or he has got no choice at all and must only work with the interview selected for him by the system (see Interviewing mode descriptions below).

So, the way in which interviews are selected by the interviewer is determined by the Interviewing mode specified for this interviewer by the supervisor, and the way in which interviews are delivered to the interviewer within this Interviewing mode is determined by the dial mode specified for each survey.

After the interviewer logs in and opts to use or not to use the Dialer, the CATI Interviewer Console starts operating in the Interviewing mode that was specified for the current interviewer by the supervisor. This Interviewing mode defines the way in which interviews are selected by an interviewer. The following Interviewing modes are available:

- **Automatic** – this mode implies that the CATI system decides which survey the current interviewer will work with, and which interview should be started. In other words the interviewer only has to wait for the interview questions to appear on the screen – he/she cannot choose survey and/or interviews himself (see Automatic Mode for details).
- **Survey selection** – this mode allows the interviewer to select the survey, while the interviews from the selected survey are delivered to him based on the system decision (see Survey Selection Modefor details).
- **Manual selection** – this mode allows for manual choice both of the survey and the interview. The interviewer should decide for himself which interview from which survey he/she wants to work with (see Manual Selection Mode for details).
- **Choice** - this mode allows for choosing the Interviewing mode the interviewer will start working in. The list of Interviewing modes available for choosing is determined by the supervisor. Refer to Choice Mode for details on working in the Choice mode.

The CATI Console displays a slightly different interface for each Interviewing mode. Additionally, when the Dialer is in use, and it operates in the Preview mode (see Dialer for details on dialing modes), the CATI Interviewer Console will display the appropriate information in its working area prior to delivering a call so that the interviewer can make some decision based on this information. To proceed with interviewing and receive the delivered call the interviewer must confirm this action.

Besides, in all Interviewing modes, the CATI Console will handle the abnormal interview termination (on system crash etc.) in the following way – the next time the interviewer logs in to work with the CATI Console after the interview was abnormally terminated, the CATI Console will display the following message upon successful login.

Figure 245 Warning message displayed upon logging in after abnormal application termination

The interviewer is supposed to continue the terminated interview from the first question that contains no answer. This interview is displayed in the work area of the CATI Console right after OK is pressed.

6.7.1. Automatic Mode

In this mode the interviewer is provided with interviews in the order determined by the system; the interviewer cannot alter this order.

If when the interviewer logs in in the Automatic mode interviews are assigned to them, the first interview is started and the first question is displayed on the screen. If no interviews assigned, the CATI Interviewer Console displays the message: “No calls. Please wait”.

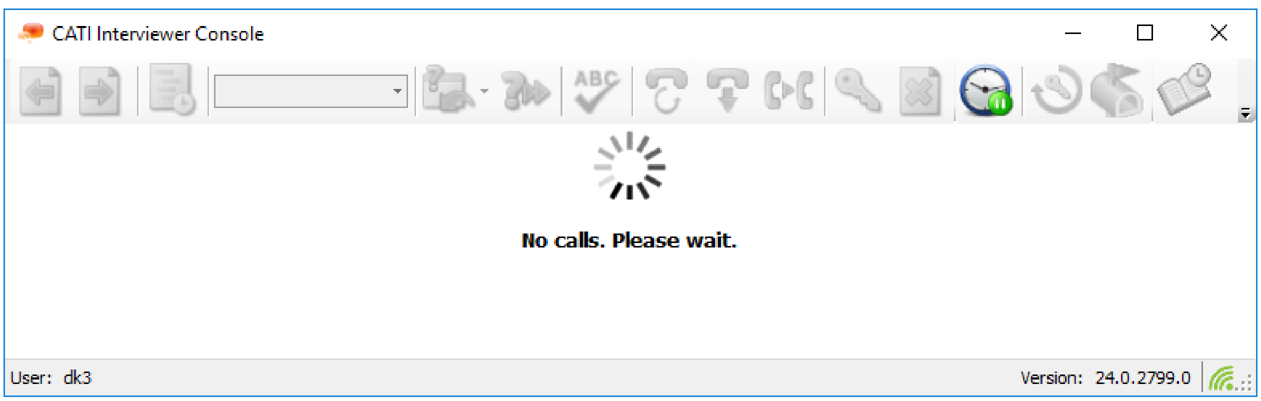


Figure 246 Message displayed on logging in when no interviews are available

The system then waits for one minute for new interviews to be assigned. If no interviews are found, the following message is displayed.

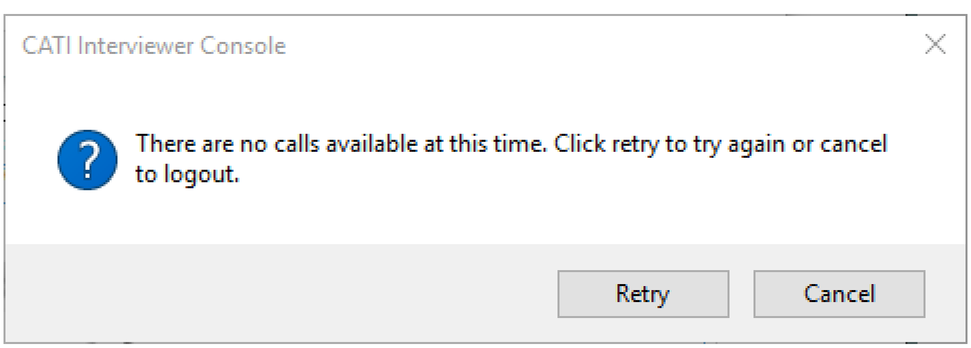


Figure 247 Message displayed on expiration of a one-minute waiting interval

If you choose **Retry**, the system waits for another minute and if no interviews are found same message is displayed.

If you choose **Cancel** the system logs you out.

6.7.2. Survey Selection Mode

In this mode, surveys are assigned to the interviewer and he/she can choose one to work with.

When the CATI Console starts in the Survey Selection mode the interviewer is presented with the list of all assigned surveys.

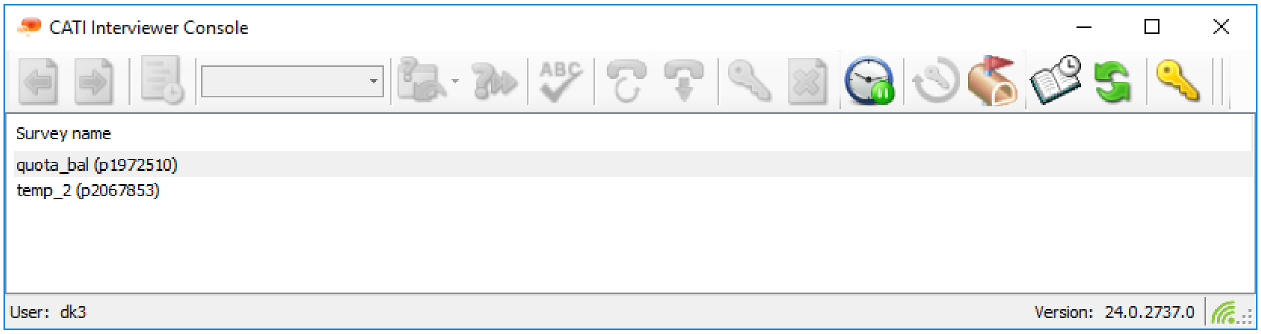


Figure 248 Example of the CATI Interviewer Console started in the Survey Selection mode

The interviewer selects a survey by double-clicking its name in the list, and the CATI Interviewer Console then starts the first interview from that survey that is assigned to the interviewer. From then on the CATI Interviewer Console operates in the Automatic mode (go to Automatic Mode on page 253 for more information) - when the first interview is finished the CATI Interviewer Console starts the next until all interviews from this survey that are assigned to the interviewer are finished.

Important!
Regardless of how many surveys are assigned to the interviewer, he/she can work with only a single survey during a session. Once all the interviews from the selected survey that have been assigned to the interviewer are finished, he/she must log out and then log in again to work with another survey.

Note: If only one survey is assigned to the interviewer working in the Survey Selection mode, the CATI Interviewer Console starts operating in the Automatic Interviewing mode from the very beginning as the interviewer cannot choose another survey.

If when the current interviewer logs in they have no surveys assigned to them, the CATI Console displays the following message.

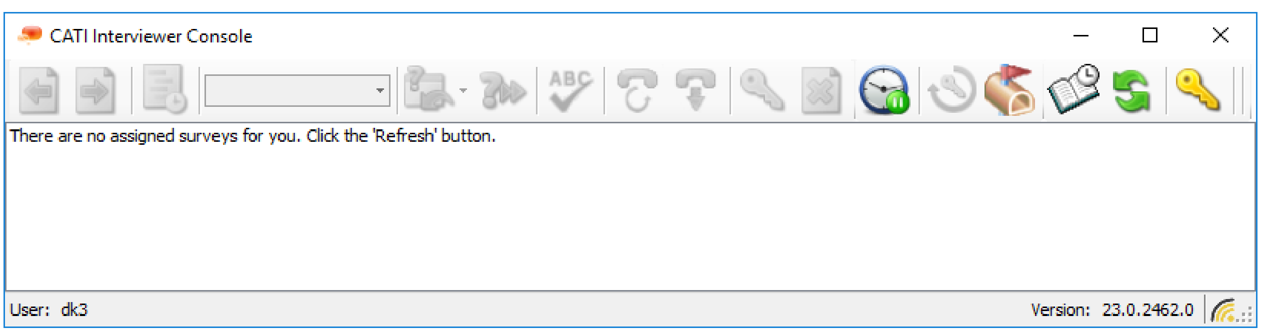


Figure 249 Message displayed on log-in in Survey Selection mode when no surveys are available

At this point the interviewer can either log out of the CATI Console by pressing the **Log out** button  (go to Logging Out and Closing the CATI Console Window on page 293 for more information), or they can click the **Refresh** button to force the interviewer console to perform another search for an assigned survey. If **Refresh** is clicked and no assigned survey is found for the current interviewer, the same message is displayed again. The interviewer can repeat the procedure until an assigned survey appears, or he/she can log out of the CATI Console.

6.7.3. Manual Selection Mode

In this mode the interviewer is free to choose any assigned interview from any assigned survey.

When the CATI Console starts in Manual Selection mode the interviewer is presented with a list of all the surveys assigned to them. They select a survey by double-clicking its name in the list in the left pane, and the right pane is then populated with the list of interviews available for this survey.

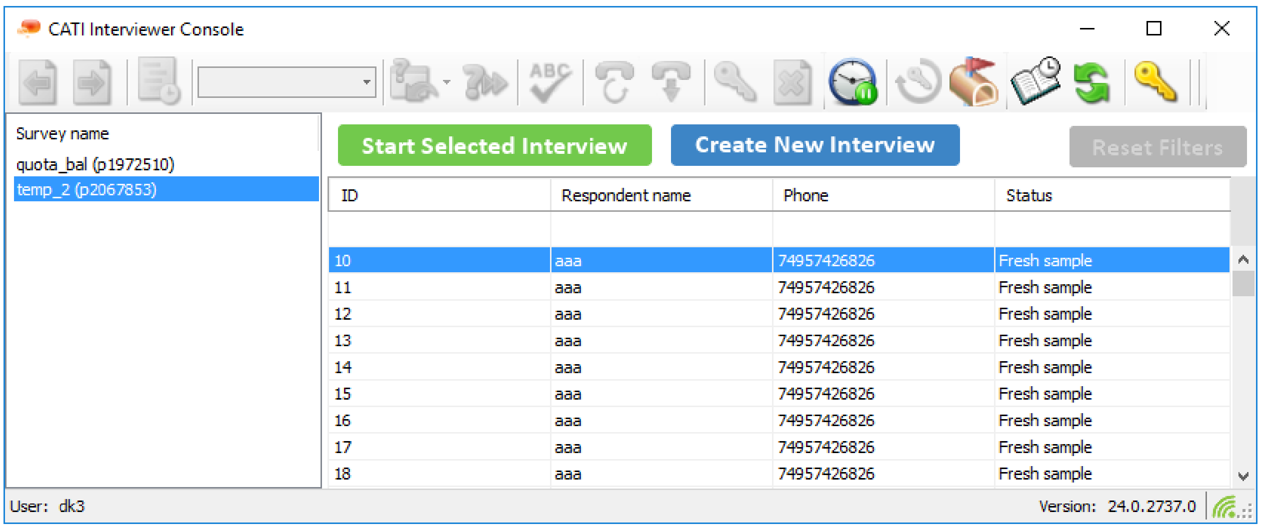


Figure 250 The CATI Interviewer Console - a survey is selected in the Manual Selection mode

Each interview is displayed as a single row in the list, with the interview details shown in columns. The first four columns are fixed - these parameters are always displayed in the interview list by default. Additional sets of interview questions can be added as columns here, configured by a supervisor in the Forsta Authoring module (refer to the separate CATI Administrator manual and Authoring manual for instructions) and on the Interviewer Search tab of the Survey information view(go to Adding Searchable Questions to the Interview on page 101 for more information).

Note that if the survey selected in the left pane contains no interviews (there are no records remaining in the sample or there are no interviews assigned to the interviewer), then the right pane remains empty. In this case only a completely new interview can be created.

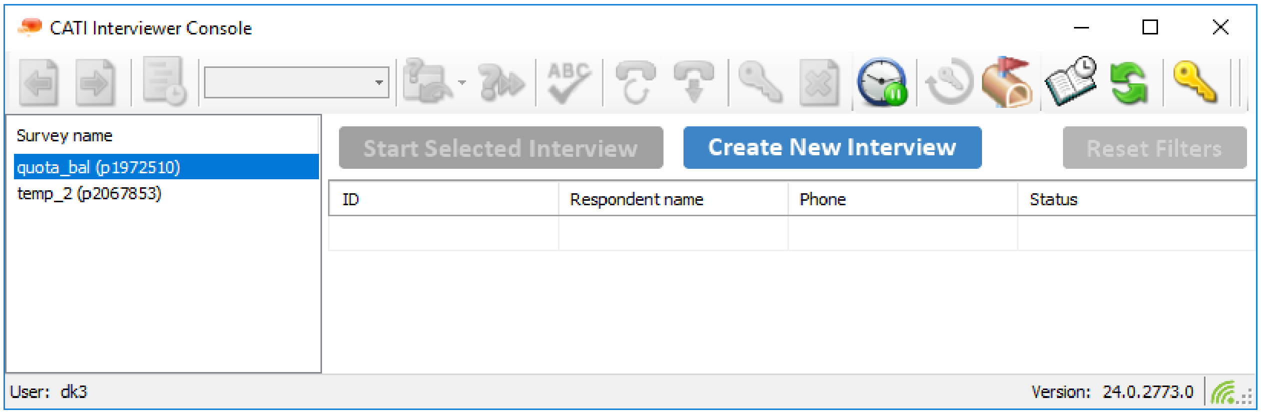
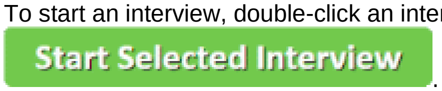


Figure 251 The CATI Interviewer Console - the selected survey has no interviews

When the interviewer is working in the Manual Selection mode, two action buttons are displayed above the right pane. Both buttons start an interview; the **Start Selected Interview** button starts the interview which is selected in the right pane and this button is inactive if the list in the right pane contains no interviews, while the **Create New Interview** button creates a new interview when there is no corresponding sample record available.

The **Create New Interview** button becomes available only when the "Allow dynamic creation of new respondent records" option is enabled in the **Forsta Authoring module > Survey Settings > CATI Options** tab.

To start an interview, double-click an interview in the list or select it and click the **Start Selected Interview** button 

.

There may arise situations when an interview needs to be started but the sample contains no corresponding record. For example an inbound call may come in from a respondent who was not included into the sample, or some testing may need to be carried out but there are no sample records handy. In this case the interviewer clicks the **Create New Interview** button 

. A new interview is then started which is stored in the database and can be viewed in the Call Management window. An interview started without a corresponding sample record is conducted in the same way as a regular interview, but it is not added to the list of interviews in the CATI Console. Make a note of the Interview ID which is displayed in the CATI Console bottom status bar when this type of interview is started - this ID can be used to find the interview in the Call Management window. You can also note the date and time when the interview was started (the Time of Last Call) as this parameter can also help to identify the "anonymous" interview.

If no surveys are assigned to the current interviewer, the CATI Interviewer Console displays the following message.

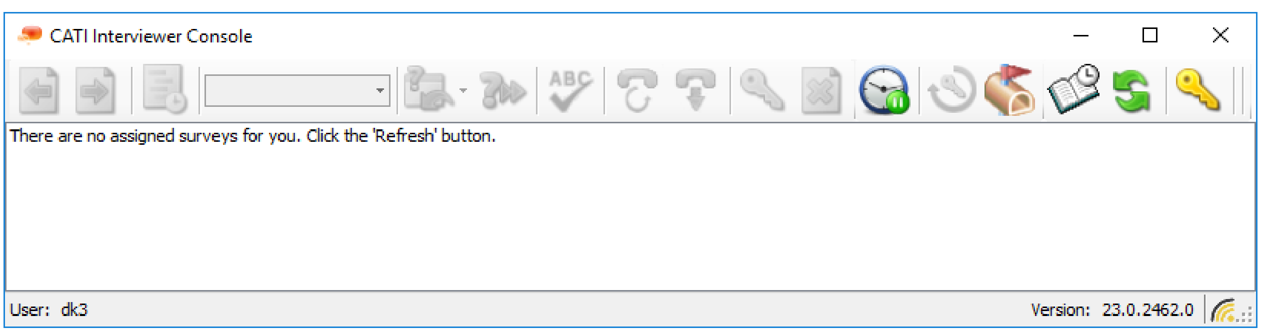


Figure 252 Message displayed on logging in in the Manual Selection mode when no surveys are available

At this point the interviewer can either log out of the CATI Console by pressing the **Log out** button  on the toolbar (go to Logging Out and Closing the CATI Console Window on page 293 for more information), or they can click the **Refresh** button to force the interviewer console to repeat the search for an assigned survey. If **Refresh** is clicked, and no assigned survey is found for the current interviewer, the same message is displayed again. The interviewer can repeat the procedure until the assigned survey appears or he/she can log out of the CATI Console.

An interviewer can search for a particular interview by applying filters in the interview list in the right pane. Each column contains a blank cell below the column header cell. To filter sample records by a particular parameter, click into a blank cell below the appropriate column header and enter search criteria then press **Enter** on your keyboard. The list is filtered to display only interviews that match the criteria. You can apply filters to two or more parameters simultaneously.

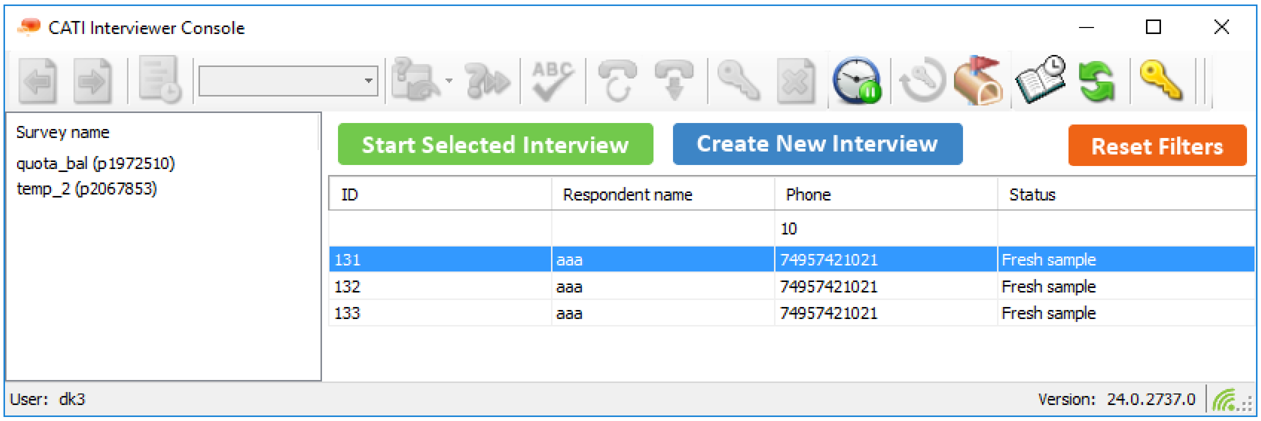


Figure 253 Searching for an interview

To remove all applied filters click the **Reset Filters** button 

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6.7.4. Choice Mode

As with all other Interviewing modes, the Choice mode is appointed by the Supervisor. When the Supervisor assigns the Choice mode to the interviewer, he/she specifies the list of Interviewing modes from which the interviewer can select the mode they wish to work in. When the CATI Interviewer Console is started in this mode, the interviewer can select the Interviewing mode they wish to work in.

When an interviewer who is assigned the Choice mode logs into the CATI Interviewer Console, the interviewer is presented with the Login type dialog.

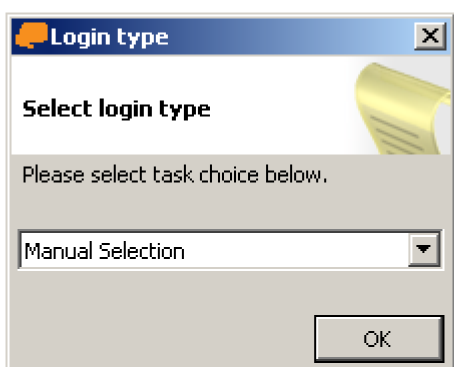


Figure 254 Selecting the Interviewing mode in the Choice mode

The interviewer selects the Interviewing mode they wish to work in from the list of those available, then clicks **OK**. The CATI Interviewer Console then starts in the selected mode. Note that the remainder of the mode selection procedures are slightly different depending on whether the interviewer is working with a dialer (go to Dialer on page 349 for more information).

With a dialer:

The interviewer will continue working in the selected mode until they log out. Until the Supervisor changes the Interviewing mode for that interviewer to a mode other than Choice, the next time they log in if they wish they can select a different interviewing mode from the list .

Without a dialer:

If the interviewer logs in to the CATI Interviewer Console without a Dialer, they choose the Interviewing mode in the same way. However in this case the **Change login type** button becomes active on the Console toolbar and the interviewer can then choose the Interviewing mode he/she wishes to work in for the NEXT interview, when the current interview finishes. Note that this button is not accessible when a dialer is in use.

To choose the Interviewing mode for the NEXT interview, the interviewer clicks the **Change login type** button before the current interview is finished. The button then remains in the activated state until the current interview finishes, at which point the Interviewing mode selection dialog opens and the interviewer can select a different mode from the list. The next and subsequent interviews start in this new mode until the interviewer again clicks the **Change login type** button and selects a different mode. Note that when the interviewer has activated the **Change login type** button with the intention of changing to a different interviewing mode, they can cancel the change by clicking the button again to toggle it off.

6.8. Interviewing Procedures

When an interview is started the first interview page is displayed in the work area. It may contain any kind of information - everything that the interview template implies. The layout and look of the interview pages is also determined by the interview template which is created in the Forsta Authoring module (refer to the appropriate section of the Authoring manual). Interview pages may contain questions along with the answer options, prompts for the interviewer etc.

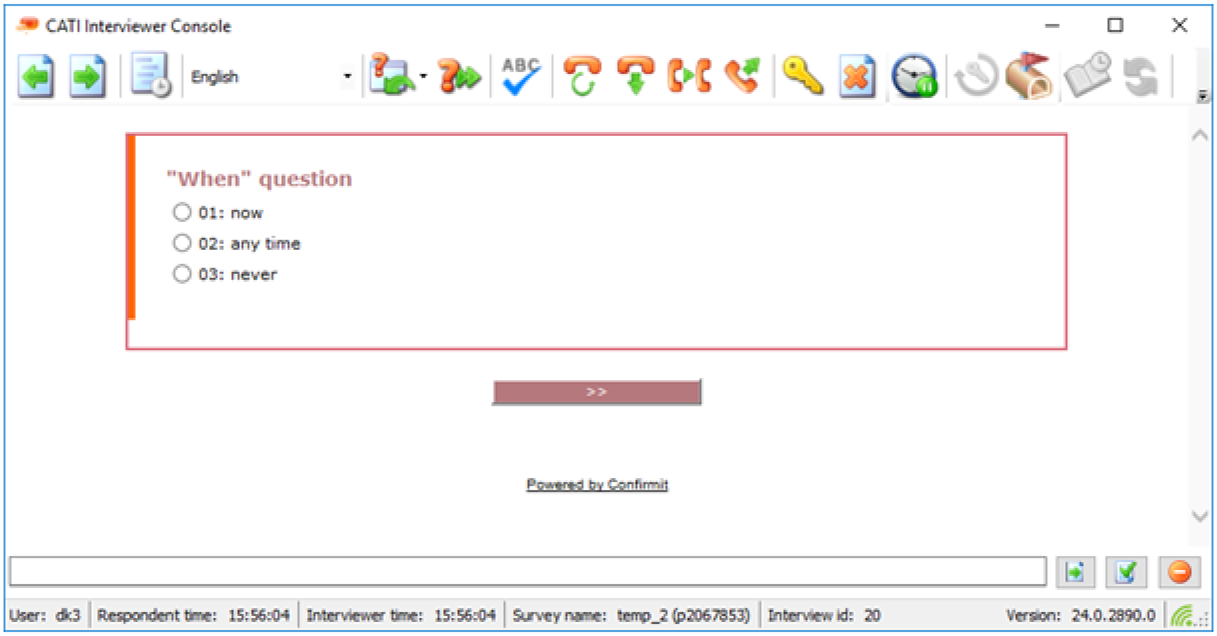


Figure 255 Example of an interview page displayed in the work area - it contains extra infomation, prompts and a question

The interviewer will normally proceed through interview questions in the order in which they appear; he/she asks a question, listens to the respondent's answer and enters this answer, them moves to the next question until the interview is completed. Note that depending on the question type (a Single, Multi, 3D Grid etc.) one page can include a number of questions, so moving from one question to another does not necessarily require moving to another page.

The CATI Console provides a set of commands which allow other actions to be performed if required during the interviewing process:

- Select a language in which interview is to be conducted (if such option is available for the current interview).
- Jump one or more pages back or forward (view one of the previous or pending interview pages).
- Make an appointment according to the respondent's will.
- Modify answers entered for previous questions.
- Skip back to the question they have left to perform the Redo command.
- Terminate an interview.
- Take a break in the work.
- View messages from the supervisor.
- Log out (after the interview is either terminated or finished).

Refer to the topics in this section for details.

6.8.1. Going Through an Interview

This section provides a short summary of the interviewing process and briefly explains some terms related to the interviewing procedures. This chapter mentions different procedures which are not described in details hereafter. Read corresponding topics which are referenced throughout this chapter and listed in the Related Topics section to get detailed procedure descriptions.

Selecting and starting an interview

The interview must be selected and started before the interviewing process can begin. The interview is selected differently in different Interviewing modes (go to Selecting a Survey/Interview on page 252 for more information).

The work area of the CATI Interviewer Console

The Work area in the CATI Interviewer Console is a space between the toolbar at the top of the application window and the status bar in the bottom of this window (go to The CATI Console User Interface on page 246 for more information). In some Interviewing modes an interviewer starts his work by manually selecting a survey and an interview to work with, and then the Work area displays the list of surveys and interviews. In case an interviewer is assigned to work in an automatic choice mode, the Work area displays the interview page right from the start.

Usually when the particular interview is chosen, the work area of the CATI Interviewer Console displays the interview page containing the question and answer variants (this is the case most of the times but it actually may contain a special information, or a prompt). An interview page contains different control elements and indicators which help in selecting answers, or provide necessary information to the interviewer. Actual page layouts and the interview logic are composed in the Authoring module - refer to the relevant Authoring documentation for information on how to create and edit a survey.

Commands that are used in the CATI Interviewer Console

The CATI Interviewer Console provides support for a wide variety of keyboard commands - in some situations they can be used as a substitute for the toolbar buttons, and sometimes they provide the unique functionality. Available keyboard commands are described in (go to Keyboard Support in the CATI Interviewer Console on page 268 for more information), and the basic set of hot key combinations supported by the CATI Interviewer Console can be found in (go to Appendix C - List of Hot-Key Combinations used with CATI Interviewer Console on page 463 for more information).

Entering respondent's answers

In general the interviewing routine goes like this. The interviewer asks the respondent a question and reads out all answer variants if needed (actually they read it from the currently displayed interview page). When the respondent chooses the answer variant, the interviewer marks the chosen answer (or enters a text in the corresponding field) in the appropriate way. For example, in the picture shown below the interviewer has to select some radio buttons to mark appropriate answers.

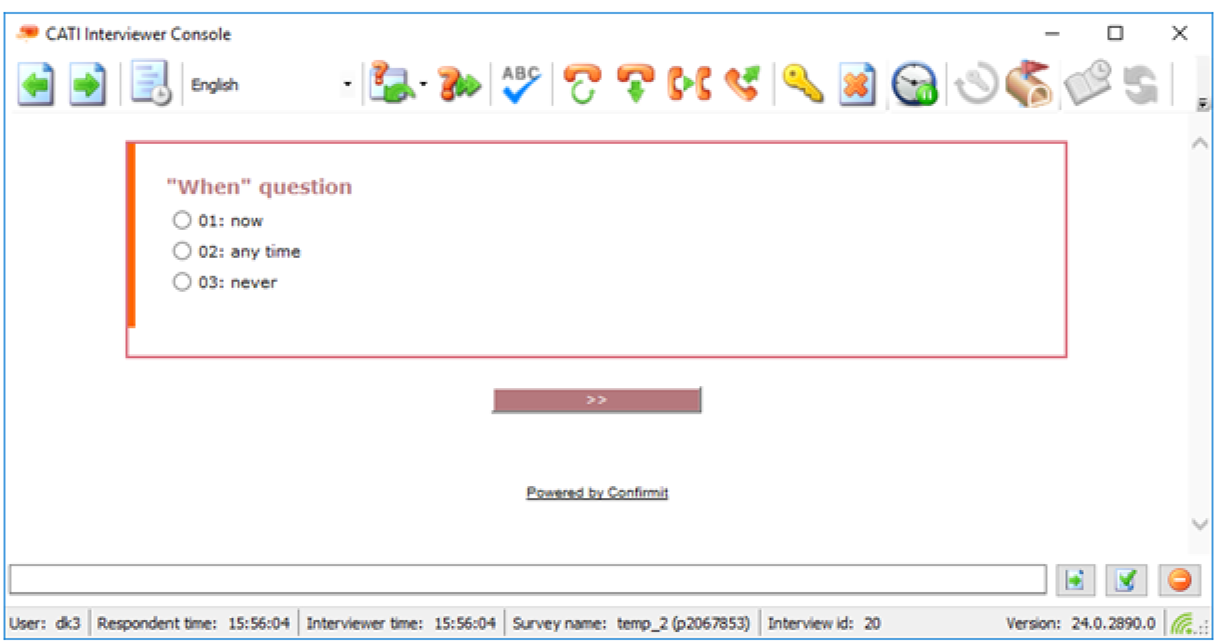


Figure 256 Selecting an answer to the question

Keyboard entry box

Note that when a new interview page is displayed, the keyboard input focus is always automatically set to the keyboard entry box regardless of what question type is displayed. This means that until you submit the entered string (by pressing Enter on the keyboard or Enter button beside the keyboard entry box) or intentionally choose another UI element in Console the characters you are typing using the keyboard are displayed in the keyboard entry box only.

The interviewer can select the required answer variant by typing its precode (if such is available) in the keyboard entry text box in the bottom of the CATI Console window. When the Enter button located next to that field is pressed the Interviewer Console marks the matching answer variant in the list.

There are two answer types that can be predefined in the answer list – the “default” and the “refused” answer. If present, both answers are marked in the appropriate way. The interviewer can either choose them in the list, or he/she can click the Default Answer or the Refused Answer button in the bottom of the question area to automatically select one of these variants. Alternatively the interviewer can press the Ctrl+D hotkey combination to select the default answer, or Ctrl+R to select the refused answer.

Moving back and forward through interview questions

The interviewer can move one question back and one question forward by pressing Page Back or Page Forward button on the toolbar. These actions are also executed when the following hot key combinations are pressed – Ctrl+Backspace, or Left cursor key, or PgUp for moving one page back, and Right cursor key, or PgDn for moving one page forward. These buttons duplicate Back and Next buttons that are usually placed on the question page below the answer list. You cannot move one page forward without providing an answer if the current question requires that an answer has to be selected.

Jumping back to an already answered question

Sometimes respondent may decide that one of his previous answers was wrong, and ask the interviewer to correct it. This action also applies in case the interviewer decides to correct previous answer himself. The best way to get back to the required question is to click the Redo button on the toolbar (see Modifying an Answer for instructions).

Jumping forward or returning to the last question

When the interviewer moves a number of questions back, they have the option of returning directly to the question page they left without the need of going forward through questions one by one. To return to the last question page, click the **Fast Forward** button on the toolbar, or press the **Ctrl+Enter** hot-key combination (go to Modifying an Answer on page 285 for more information).

Quick Dial and Redial functionality

The interviewer may be asked by a respondent to quickly redial the same number (for some reason) or dial another number instantaneously provided by the respondent (to connect using another telephone line). To perform this operation the interviewer should click the Redial button on the toolbar.

Connection Status indication

Connection quality affects console operation. Poor connection may cause operation delays or errors. The Interviewer Console helps in monitoring connection health - it sends out periodical "KeepAlive" requests and measures time needed to receive a response. The system uses a sequence of results over a period of time to calculate an average response time. When an average response time stays below 300 ms threshold - connection quality is considered "Good" (a green indicator icon), when it is between 300 and 1000 ms - connection quality is considered "Normal" (a yellow icon), and when it drops below the 1000 ms threshold - connection is considered "Poor" (a red icon). Series of timeouts are reported as "No connection" (grey icon with a red exclamatory sign across it).

The connection status indicator icon is displayed in the rightmost part of the Status Bar, next to the Console version number.

A tooltip explains an indicator - hover a mouth pointer over the connection status indicator to display it.

Figure 257 Good connection

Figure 258 Normal connection

Figure 259 Poor connection

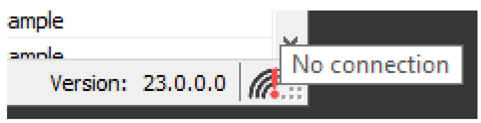


Figure 260 No connection

KeepAlive duration values (which are used to determine connection state) are stored in the CatiInterviewerConsole log file and can be used to analyze the situation.

Contact the system administrator as soon as possible if the connection status indicator changes to "Poor connection" or "No connection".

Communication and dialer error messages

If a loss of connectivity occurs during the interview, the CATI Interviewer Console displays the appropriate warning message in the working area, like in the picture below.

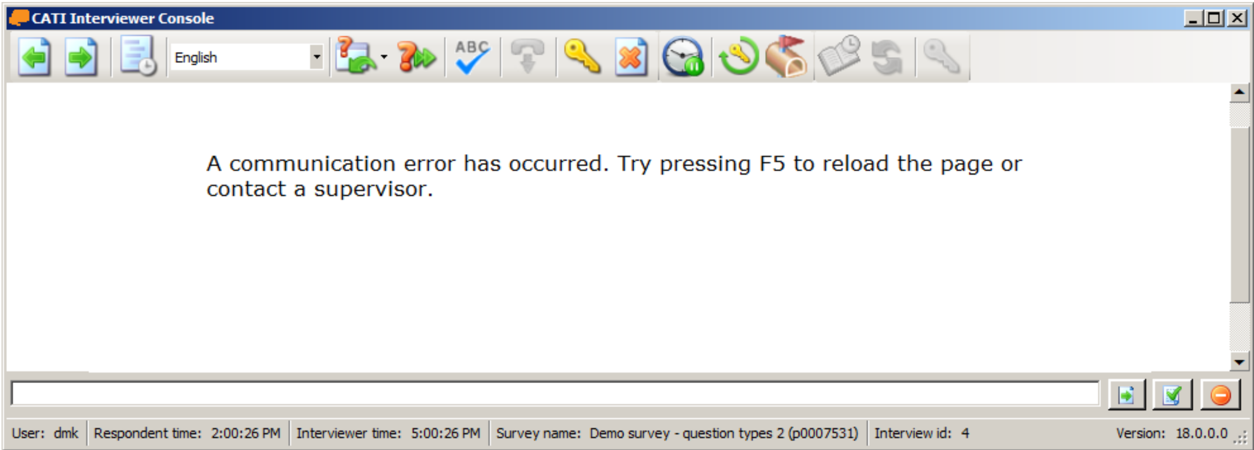


Figure 261 Warning message displayed in Console upon connectivity loss

The interviewer can resubmit the previous interview page to the system. To do so he should press the F5 key on the keyboard. The situation may not improve so it is recommended to repeat the action several times pausing between the attempts. When connection is reestablished, the Console will display the next interview page after F5 is pressed. If connection is not reestablished over a substantial period of time, the interviewer should contact the supervisor and report the situation to him.

Sometimes an error may occur on the dialer side (this can happen if you work with the dialer). In this case the CATI Interviewer Console aborts the interview and displays the appropriate error message in the working area. You should write down the message text (or make the screenshot), and contact the supervisor or your system administrator and describe the situation showing the message text. The list of the dialer related error messages can be found in (go to Appendix G - List of Dialer-Related Error Messages on page 470 for more information).

The Interviewer Console communicates Forsta services at the interview start, end or at dialer specific activities during interviewing. Such communications take place in the following situations:

- interview end;
- an open-end review is due to be done;
- interviewer enters the Interviewing mode which was set up for him by supervisor (upon logging in);
- interview node assumes using a dialer;
- interviewer resumes his work in the Interviewer Console when returning from a break.

If connection cannot be established in any of the above situations the Interviewer Console tries two more times and, if the situation persists (three unsuccessful reconnection attempts are completed), the Console will provide the interviewer with the choice of either repeating the attempt or exiting (shutting down the Interviewer Console). Upon completing three unsuccessful attempts Interviewer Console displays the following dialog.

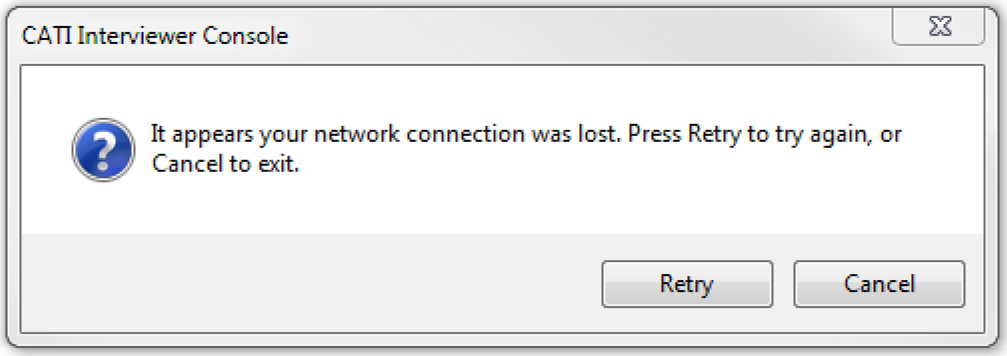


Figure 262 Connection lost during Console service activities

Selecting Retry will initiate three extra reconnection attempts. If they prove to be unsuccessful too, the same dialog will be displayed again.

Selecting Exit will shut down the Interviewer Console, but will not log the interviewer out of the system; they can attempt to log back into the console, but if there are continued problems the interviewer may need to be logged out by the supervisor from the Interviewer Activity List (see (go to Terminating an Interview and Forcing the Interviewer to be Logged Out on page 323 for more information) for instructions).

Inbound call handling

(only for systems using an integrated dialer which supports inbound call routing)

The CATI Interviewer Console displays no warning to the interviewer when the system delivers an inbound call.

When an interviewer is working on an inbound call, the CATI Interviewer Console toolbar and status bar change color to green, and a corresponding badge appears on the right side of the toolbar.

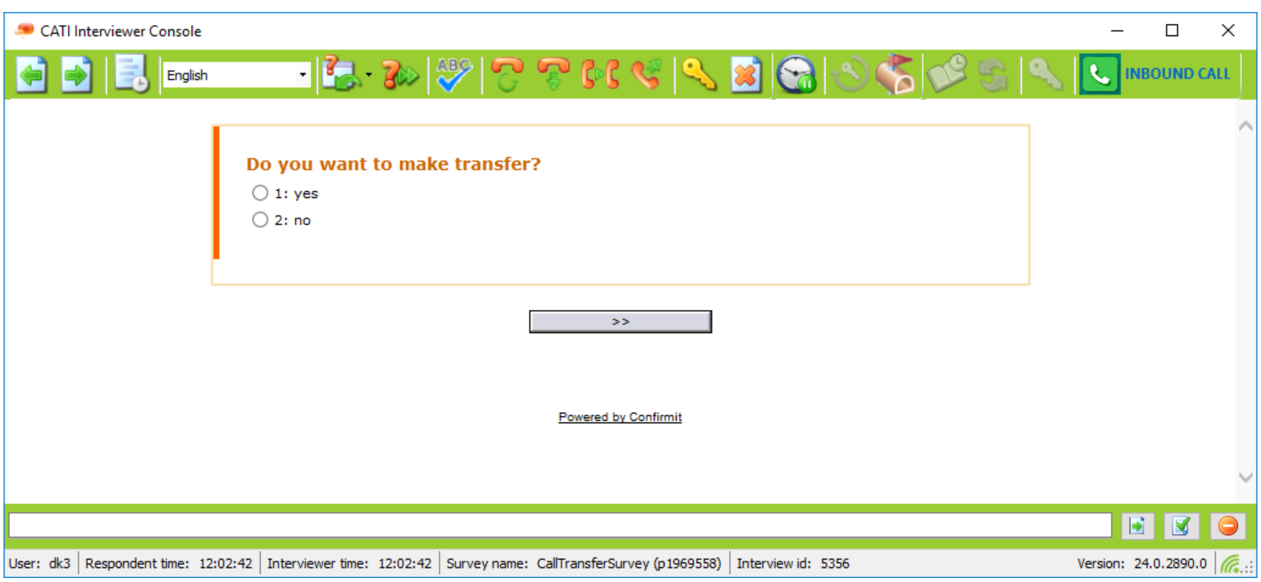


Figure 263 Indication of an inbound call

Except for the fact that the interviewer is working with the inbound call and the Interviewer Console shows appropriate indication, all interviewing procedures and actions are performed as usual.

Survey run in a "test" mode

There can be times when a survey containing real life data should be tested for some reason. If this is the case this survey is most of the times simply duplicated. This creates a potential situation when a real life survey and its test version could be mixed up. To avoid this error users are suggested to append a special "#Test" string to the survey name using the Authoring module (consult the appropriate section of the Authoring manual dealing with survey design). When the survey with the name ending in "#Test" is open in the CATI Interviewer Console it displays a special interface warning the user that this is a test version fo the survey, see the illustration below.

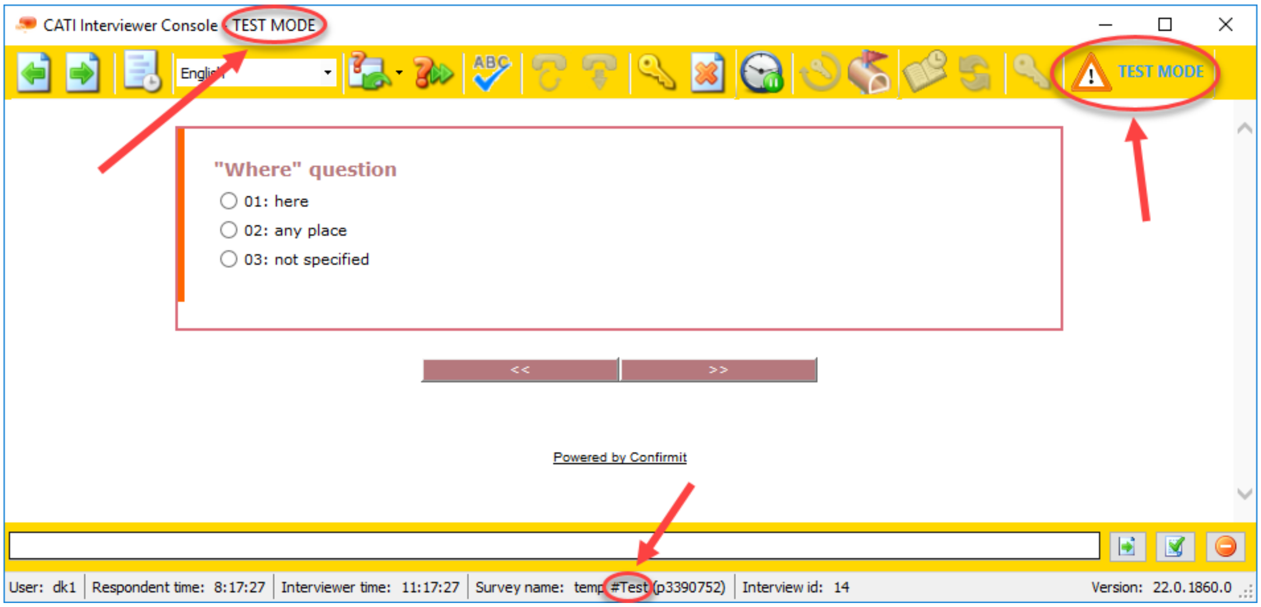


Figure 264 Survey run in the test mode

A situation is possible when a survey that has inbound calls is run in the test mode. In such case the CATI Interviewer Console displays the "test mode" interface as described in this instruction and in addition displays a flashing "Inbound call" badge next to the "Test mode" badge, same as the badge used to indicate an inbound call, see (go to Inbound call handling on page 264 for more information) for details.

Dial cancellation

When allowed by configured settings, an interviewer has the option of canceling the dial procedure while preview dialing is in progress or when making an attempt to dial a number via the redial feature (go to The Redial Functionality on page 288 for more information).

The option is located in the **Settings** menu **Interviewer Console** tab.

When dial cancellation is allowed, the Interviewer Console will look as in the figure below at the beginning of the dial or redial procedure.

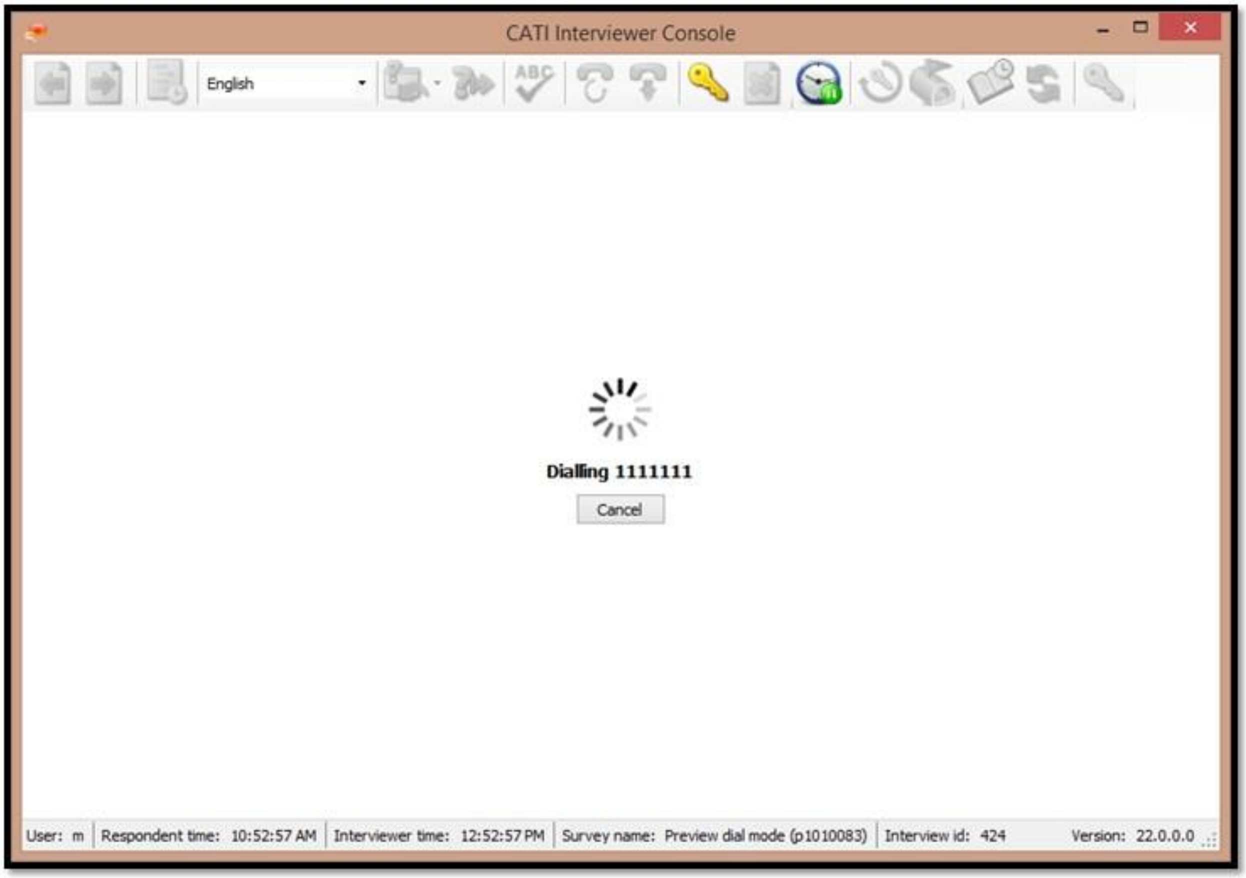


Figure 265 Cancelling a dial operation

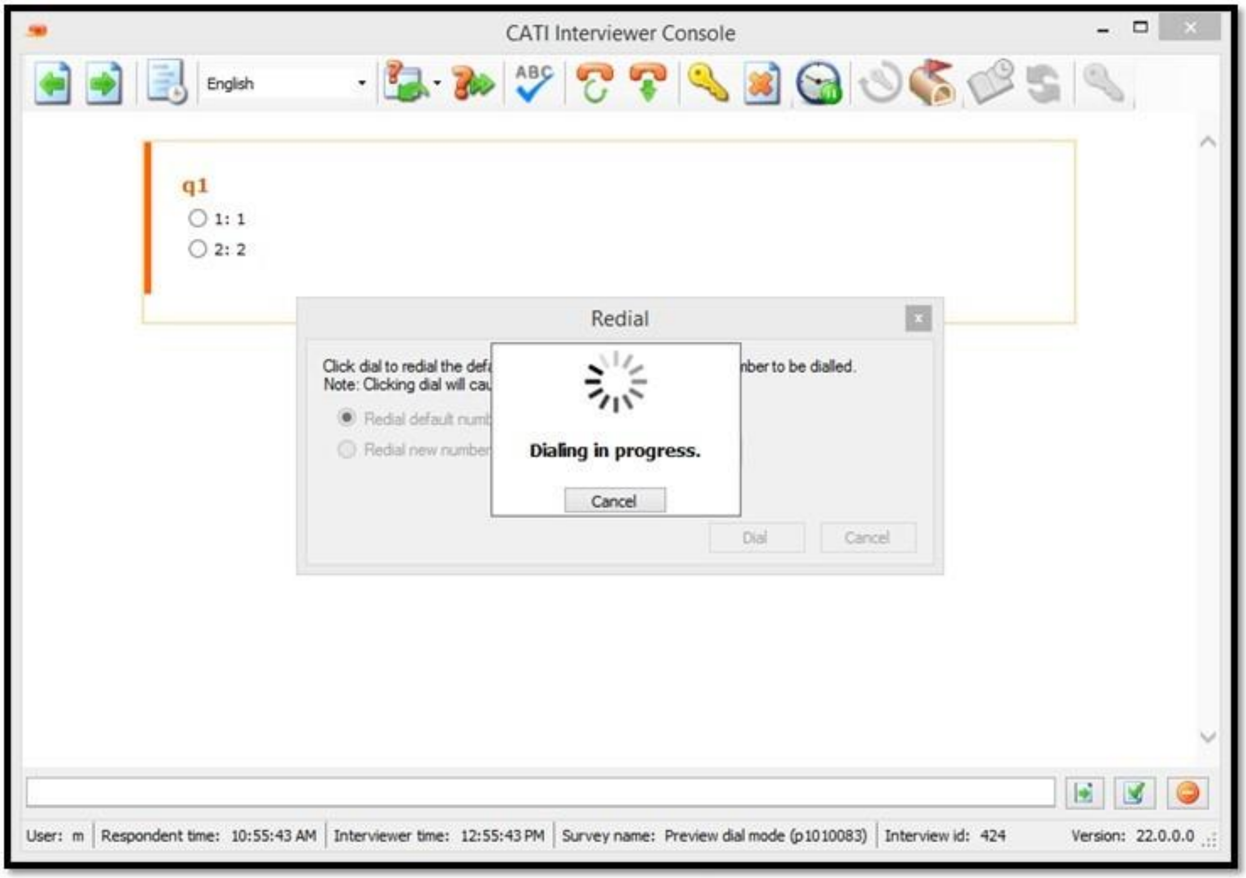


Figure 266 Cancelling a redial operation

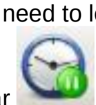
Clicking Cancel will cancel Dial or Redial operation.

Call transfer functionality

A system administrator may enable the Call transfer functionality. This assumes enabling of two separate functions: Internal and External call transfer. Internal call transfer allows the interviewer to transfer call to another interviewer working in the same company. External transfer means a call can be transferred to any telephone number which is specified in the CATI Supervisor External Transfer list by a supervisor.

When the appropriate function is enabled, the Internal Transfer  and External Transfer  buttons become available on the Console toolbar. Then the interviewer can transfer a call he is currently working on at any point of the interview. Only already started interviews (calls) can be transferred to another person (go to Performing Call Transfers on page 276 for more information).

Taking a break

If you need to leave the desk and your work must be temporarily halted, you can click the Take break button on the toolbar  and choose what type of break you are going to take. You cannot take a break while the interview is in progress, but you can do it in between the interviews (when the previous one is finished, and another one has not started yet). When an interview is in progress, this button acts like a toggle button - it will stay depressed until the current interview is finished and then you will be automatically switched to the Break mode (go to Interviewer on a Break on page 272 for more information).

Making an appointment

In case the respondent expresses his will to continue the interview at a later time, you can create an appointment for that time (go to Making an Appointment on page 274 for more information).

Logging out

The interviewer may decide to log out of the CATI Console after the current interview is over. To do that he/she, before the interview finishes, should toggle the **Log out after finishing current interview** button  on the toolbar, or press **Ctrl+Q** on the keyboard (go to Logging Out and Closing the CATI Console Window on page 293 for more information). An alternative way of logging out is also applicable when the interviewer works in the Manual Interviewing mode. In this case, when the current interview is finished, they click the **Log Out** button . Both buttons look the same but are available in different situations - the **Log out after finishing current interview** button is available only when an interview is in progress, and it is grayed out when an interview is completed, while the **Log Out** button which remains inaccessible in the course of an interview becomes active only when an interview is finished.

Terminating an interview

The Interviewer can terminate the current interview immediately without leaving the CATI Console. To do that he/she should click the **Terminate current interview** button  on the toolbar, or press **Ctrl+X** on the keyboard (go to Terminating an Interview on page 291 for more information).

The finished interview

The interview is considered finished when all interview questions are answered.

6.8.2. Keyboard Support in the CATI Interviewer Console

The CATI Interviewer Console supports commands which are performed by pressing combinations of keys on your keyboard. This section describes the hot-key combinations, provides examples of use, and limitations. Note that keyboard commands corresponding to a particular CATI Console function are also listed in the relevant topics.

6.8.2.1. Selecting a Survey/Interview using the Keyboard

If the Interviewing mode does not assume automatic choice of a survey/interview, you can select the survey/interview in the CATI Interviewer Console window.

- Press the **Tab** key to move focus from the survey frame to the interview frame.
- Required surveys and interviews are highlighted by the cursor - move the cursor in the survey or interview list using the **Up** and **Down** keys on the keyboard.
- Press **Enter** to activate the highlighted survey/interview (if applicable to the Interviewing mode the interviewer works in). If you have chosen a survey by pressing **Enter**, press **Tab** to move focus to the Interview frame to choose an interview.
- Press **Enter** after the interview is highlighted to start the interviewing process.

6.8.2.2. CATI Console Toolbar Hot Keys

The hot-keys described in this section are used as a substitute for Console toolbar button commands.

- **Ctrl+Backspace, PgUp** – Previous page (submits the current page).
- **Enter, or PgDn** – Next page (submits the current page).
- **Ctrl+Enter** – Fast forward.
- **F7** – Check the spelling of all "free text" answers on the page.

- **Ctrl+A** – Make an appointment.
- **Ctrl+H** - Hang up the respondent line.
- **Ctrl+X** – Terminate an interview.
- **Ctrl+Q** – Log out after the current interview is finished.
- **Ctrl+B** - Take a break in the work.

6.8.2.3. Selecting a Question and an Answer on the Interview Page

This topic lists basic key combinations used to select a question and a corresponding answer option on the interview page (go to Appendix C - List of Hot-Key Combinations used with CATI Interviewer Console on page 463 for more information).

Note that by default the first question on the page is always highlighted.

Note: If the user presses any of the key combinations listed below, the action should be executed even if the keyboard entry text box is not selected. This will also result in the keyboard entry text box being selected.

The following keyboard sequences are available:

- **Ctrl+D –** chooses the "Default" answer.
- **Ctrl+R –** chooses the "Refused" answer.
- **Up, Shift+Tab –** highlights the previous question on the page.
- **Down, Tab –** highlights the next question on the page.
- **Ctrl+Backspace, PgUp –** goes to previous page (the same occurs if you click the **Previous** button).
- **PgDown –** goes to next page (the same occurs if you click the **Next** button).
- **Home** – highlights the first sub-question (if one exists) of the current question.
- **End –** highlights the last sub-question (if one exists) of the current question.
- **Ctrl+Home –** highlights the first sub-question (if any) of the first question on the page.
- **Ctrl+End –** highlights the last sub-question (if any) of the last question on the page.
- **Insert –** moves focus to the keyboard entry box.
- **Esc** (when Text Area or Input textbox of the current question is focused) – focus changes to the keyboard entry text box.
- **F2** (when current question is Open/Multi question) – focus moves to Text Area or Input textbox of the current question.
- The **Enter** key is the submission key. Click **Enter** to submit the text currently entered in the keyboard entry box. Click **Enter** again to submit the question.

6.8.2.4. Moving to the Next Question

To move to the next question, press **Enter** when the keyboard entry box is empty. Alternatively press **PgDn**, or click the **Page Forward** button  on the toolbar. The current question page is submitted and the next page is displayed (assuming the validation is passed).

6.8.2.5. *Taking a Break*

When the interviewer wishes to take a break from interviewing work, they must click the **Take a Break** button  or press the hot-key combination **Ctrl+B** to switch the Interviewer Console to the Break mode, and click/press it again to switch the Console back to the normal working mode when they return (go to Interviewer on a Break on page 272 for more information).

Note that when the interview is in progress, the Console waits until the interview is finished then switches to the Break mode. While waiting, the Take a Break button remains activated indicating that the Console is ready to switch to the Break mode when the interview is over.

While the current interview remains unfinished the interviewer can deactivate the break request by either clicking the button pressing the hot-key combination **Ctrl+B** again.

When there are no active interviews (i.e. the current interviewer is either selecting an interview or waiting for an interview to be delivered), pressing the **Ctrl+B** hotkey combination will switch the interviewer into the Break mode.

6.8.2.6. *Highlighting Question Rules*

- Focus on question when error - when the page is submitted, if errors are discovered on the page then the first question containing an error will be selected.
- Answering a question with the mouse - If the interviewer attempts to answer a question with the mouse by clicking on the question, the question will be highlighted.

6.8.2.7. *Question Type-Specific Functionality*

- **Multi questions –** the keyboard entry text box will accept codes entered as a comma-separated list. For example, to select codes "a", "b", and "d" for a multi question, type: a,b,d and then press **Enter**.

Note: To deselect selected categories, type them and then press Enter; the selection is canceled.

- **Open Text List** and **Numeric List** questions – you can type any text into the keyboard entry box. When you press Enter, the text will be copied into the form for the highlighted multi category selected, and the next category will become active.
- **Single questions** – only one code is allowed. Press **Enter** to make the selection.

Note: To deselect a selected category, type it and then press Enter; the selection is canceled.

- **Open questions** – you can type any text into the keyboard entry box. When you press **Enter**, the text is copied into the form.
- **Grid** and **3D-Grid** questions – these question types are handled as separate questions, so selecting questions will highlight each "question" inside the grid/3D grid individually. The keyboard entry box will behave differently dependent on the underlying question. For example, a grid is multiple single questions while a 3D-Grid is a collection of single/multi/grid questions sharing the same answer list.

6.8.2.8. *Limitations When Using the Keyboard*

When using the keyboard, the following limitations apply:

- **Sliders** will not visibly move, although the selected value will have been accepted. To view the change, the interviewer must move forward in the survey and then back to the question.

Note: The keyboard input is not supported for grid questions with slider option.

- When **images** are used as answers, and when different images have been defined for the different states (default, hover and selected), these images will not change although the selected answer will have been accepted. To view the change, the interviewer must move forward in the survey and then back to the question.
- Subsequent questions that appear on **dynamic** pages will not be displayed until the page is submitted. Therefore the interviewer must submit the page and remain on or return to it to answer subsequent questions.

- The interviewer cannot use the keyboard to supply answers for **card sort** questions, keyboard input **is not supported** for these questions.
- The interviewer cannot use the keyboard to supply answers for **drag and drop** (ratings) questions, keyboard input **is not supported** for these questions.
- The interviewer cannot use the keyboard inside the calendar control for **date-picker** questions.

Note: You can provide answers for date questions via the keyboard as follows: type the date as a string into the date-question's Input text box or into keyboard entry box (in the lower left area of the console) and submit the text.

- For questions with **searchable answer list**, the keyboard entry is supported only to input search text. Note that the 'Search' text disappears when the interviewer sets focus in the field. Typing text into the field filters the list. The interviewer cannot use the keyboard to supply answers.
- The interviewer cannot use the keyboard to supply answers for **capture ordered** questions.
- The interviewer cannot use the keyboard to supply answers for grid questions using the grid bars option.

6.8.2.9. Displaying Question Codes

The CATI Console shows the codes for all questions except for the following:

- **Open Text List** questions.
- **Numeric List** questions.
- **Ranking** questions.
- Questions with the '**Capture Order**' option.
- **Card Sort** questions.
- **Grid with grid bars** option.
- **Drag-n-drop** questions.
- **Dropdown** questions.
- **Multiple questions with searchable answer list**.

Note: Keyboard input is supported for "Dropdown" questions although the codes are not shown.

6.8.2.10. Support of Default and Refused Functionality

Categories with "Default" or "Refused" properties specified can be selected in the Console using the **Default** or **Refused** buttons. You can also select these using your keyboard or mouse, by selecting the corresponding category using the mouse or making the keyboard entry using codes. The following hot keys are supported:

- **Ctrl+R** for "Refused".
- **Ctrl+D** for "Default".

If there are several questions on a page the "Default" and "Refused" answer options are selected separately for each question for which default/refused functionality is available.

If an "Exclusive" category is specified as a "Default" or "Refused", it can be selected as "Default" or "Refused".

If a "Multi" category is specified as a parameter of the "Default" or "Refused" answer for a "Multi" question with multi end "Exclusive" category - when the "Exclusive" category has been chosen, choosing a "Multi" category automatically deselects the "Exclusive" category.

If the "Other" category is specified as the "Refused"\"Default" parameter for a "Single" or "Multi" question - when the "Other" category is chosen, the focus is set to the "Other" text field of the chosen category.

For "Single" questions with "Other" categories specified - when changing the choice of the "Other" category, delete the text in the deselected "Other" text field.

The "Default" and "Refused" categories (toolbar buttons and hot keys) can be chosen for Single question with the "Drop-down" option.

For Ranking, Open Text List and Numeric List questions the "Default" or "Refused" functionality works in the following way - choosing the "Default" or "Refused" category does not change to the next question and sets focus to the text field of the corresponding ("Default" or "Refused") category.

6.8.2.11. Grid Question with "Other" Fields

You can select the scale for categories with the "Other" option turned on, and fill in the "Other" text, using the keyboard.

6.8.2.12. Keyboard Support in Open Text, Open Text List and Numeric List Questions

Keyboard entry is supported for Ranking, Open Text List and Numeric List questions – each text box can be filled using the keyboard.

It is also possible to type text in the "Other" text field of the Open Text List \ Numeric List using the keyboard.

Note that if you have set the focus on one of the Open text fields in the Open Text List by clicking inside a field with the mouse, and you wish to continue filling Open fields using your keyboard, you must press the **Insert** key.

Note: When you are typing text in an Open text field which contains more than one line, when the focus is set on one of the lines in the field, pressing the Enter key moves the caret and another line is inserted. The Enter key does not submit the answer when focus is set on the Open text field.

6.8.2.13. Keyboard Support in Multi Questions

If the "Multi" question contains an "Exclusive" category, both the "Exclusive" and "Multi" answers can be chosen from the keyboard.

When the "Other" option is turned on for a "Multi" question, and the "Other" answer is chosen, the focus is set to the "Other" text field and you can enter text in this field using the keyboard.

For "Searchable multi" questions you can type the search text using your keyboard. The focus is set to the "search" field by default. Typing in the "search" field filters the list - only answers with the matching code are presented in the list.

Note: You can only enter the search text via keyboard. An answer cannot be chosen using the keyboard for the Searchable Multi question. But you MUST choose an answer in the answer list, even if the search returns a single result - if this is not done, the question is considered unanswered.

6.8.3. Interviewer on a Break

An interviewer can leave their work place for a short period of a time to take a break. If they wish to do so, they should inform the system of their absence by manually changing their log-in status by clicking the **Take Break** button on the console toolbar. Each break is either paid or unpaid. Break names and types are defined by a supervisor on the Break Classification tab in the Resources section (go to Configuring the Break Classification on page 362 for more information).

All breaks the interviewer has taken are logged and are available in a number of reports.

The supervisor can monitor current interviewer status (currently working, or is on a break) using the Interviewer List in the Activity Views (go to Monitoring Interviewers and their Work on page 303 for more information).

To take a break:

Note: The interviewer is not allowed to leave the desk while the interview is in progress.

1. Click the **Take Break** button  on the CATI Interviewer Console toolbar, or press the **Ctrl+B** hot key combination on the keyboard.

   The drop-down menu is displayed.

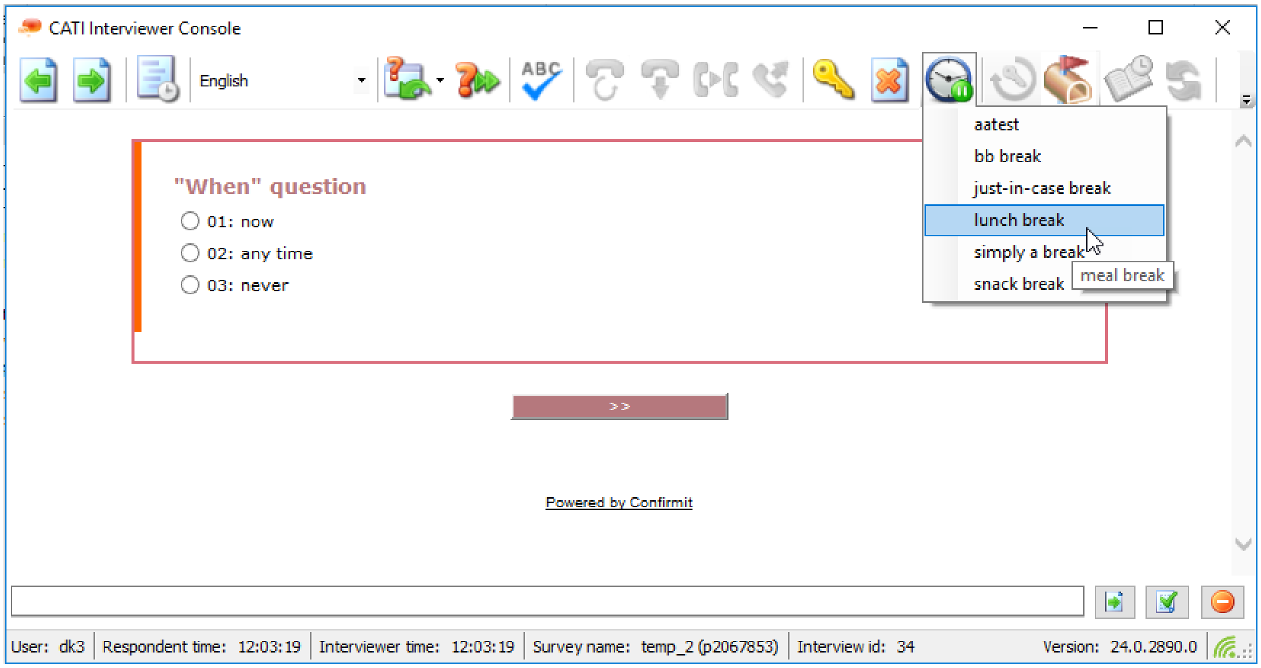


Figure 267 The Take Break drop-down

2. In the drop-down menu choose the appropriate type of break.

   When you hover the mouse pointer over the break type name the tool tip appears showing the break type description. All break types are defined by a supervisor. Each break type is marked as either paid or unpaid. The interviewer will not see what type (paid or unpaid) he chooses if this is not explicitly stated in the break name or description.

   When an interview is in progress the button will stay depressed  until the current interview is finished, then the Interviewer Console will switch to the Break mode. If an interviewer presses the **Take Break** button when they are in the Selecting state, the Console will switch to the Break mode, as below.

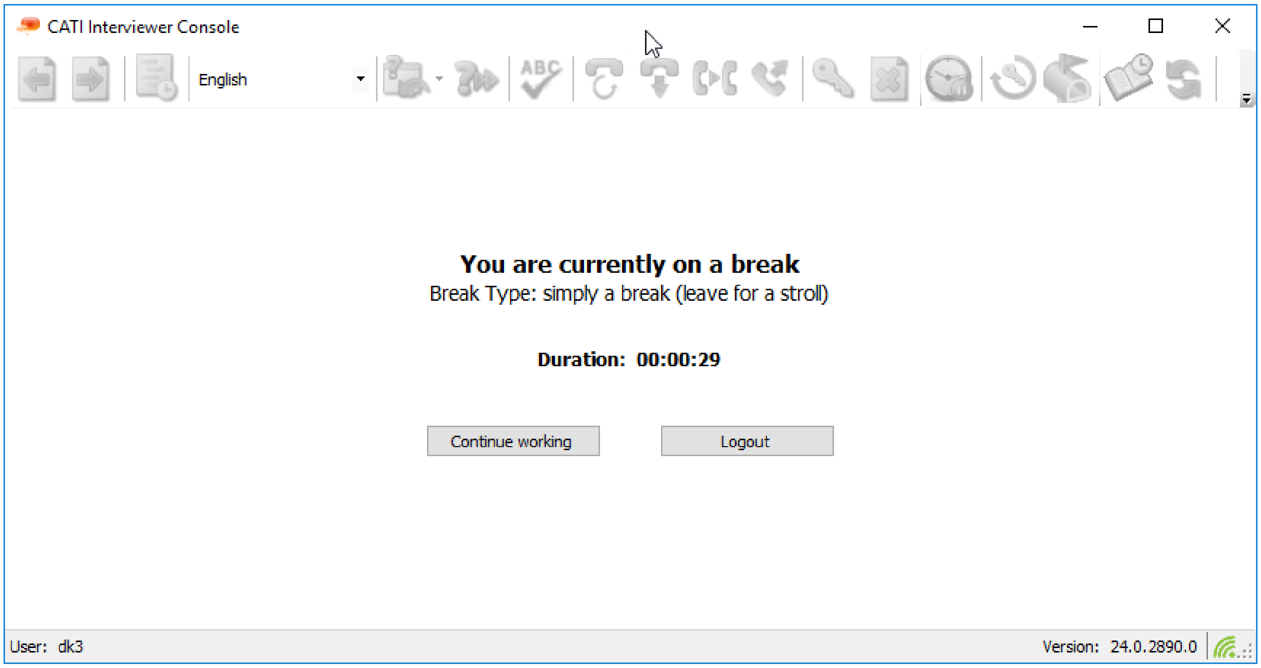


Figure 268 CATI Interviewer Console indicating the interviewer has taken a break

The counter shows the time elapsed from the moment the Console was switched to the Break mode (in HH:MM:SS format). It stops when either the **Continue working**, or the **Logout** button below the counter is pressed.

3. When the interviewer returns they have a choice of either continuing the work by pressing the **Continue working** button, or finishing the work and logging out by pressing the **Logout** button.

   If the work is continued, CATI Interviewer Console behaves depending on the current interviewer's Interviewing mode. If the interviewer presses the **Logout** button the system logs this interviewer out.

6.8.4. Making an Appointment

In the event the respondent wishes to continue the interview at a later time, the interviewer can postpone the interview and make an appointment. A reminder is then created in the CATI Console, which will activate and start the postponed interview when the time specified in the appointment is due. The appointment is not automatically assigned to the same interviewer who created it - all appointments are assigned to the interviewers by the Supervisor. An appointment can be made only for a started interview.

A situation may arise when the Appointment dialog is displayed while an interview is in progress. When the appointment was not created by the interviewer, then it was designed to be suggested in a certain situation by the person who created the survey.

Note: All appointment times are set for the respondent's time zone – not the interviewer's!

To make an appointment as an interviewer:

1. If the respondent states that he/she wishes to postpone the interview, agree a time then click the **Appointment** button  or press **Ctrl+A** on the keyboard.

   The Appointment dialog opens.

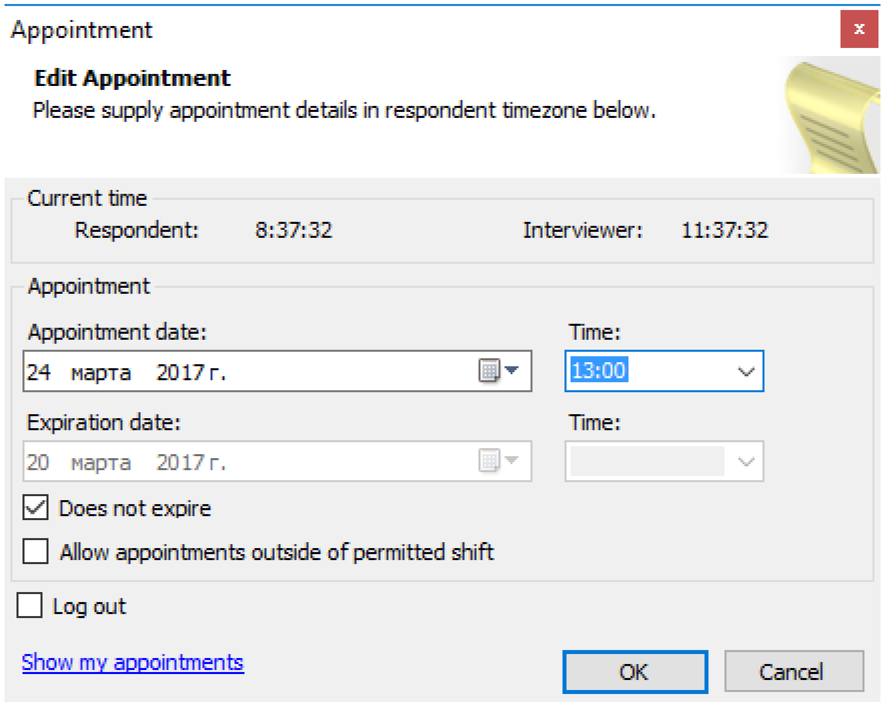


Figure 269 The Appointment dialog

The Appointment dialog displays the interviewer's and respondent's current times. The Appointment group contains the fields required to specify appointment details.

2. Click the arrow button in the Appointment date field and choose the date when the interview is to be restarted.

   To cycle through months and years, use the arrow buttons at the top of the form, then click on the desired date to select it. A prompt showing the current date is displayed in the bottom of the form - click this prompt to quickly select the current date.

   The Time drop-down field allows you to choose from the list of predefined times in 30-minute increments.

3. You can set an expiry time or you can set the appointment to never expire. If the "Does not expire" box is checked, when the appointed interview is due it will be delivered to the interviewer irrespective of the time and date he/she logs into the system.

   If the "Does not expire" box is cleared, the Expiration date and time fields becomes available and can be set.

   When the expiration date and time are set, the appointed interview will be started only if the set date and time do not exceed the current date and time. If the expiry date and time passes, the interview is no longer scheduled and it will not appear in the list of assigned interviews until the supervisor reschedules and assigns it.

4. You can create an appointment outside of the boundaries of the permitted shift. To do so, tick the "Allow appointments outside of the permitted shift" check-box. The box can be checked before or after the appointment date and time are set, but it must be checked before you create the appointment by clicking **OK**.

   If the "Allow appointments outside of the permitted shift" check-box is not displayed, this means that the supervisor has prevented the interviewer from creating such appointments.

5. You can select to log out of CATI Console after the appointment is made. If you wish to log out, check the "Log out" box in the bottom of the Appointment dialog. You will then be logged out immediately after you click **OK** in the dialog.

6. You can view the list of appointments that were assigned to you by the supervisor. Click the **Show my appointments** link in the bottom of the Appointment dialog to display the Interviewer Appointments dialog containing all the appointments you have made (go to Viewing the List of Appointments on page 251 for more information).

Note: If the supervisor disables the "Show My Appointments" button in the Interviewer Console toolbar, the "Show My Appointments" link in the Create Appointment dialog will also be hidden (go to Interviewer Console Settings Section on page 451 for more information).

7. Finally, click **OK** in the Appointment dialog to confirm the appointment time and close the dialog.

   The CATI Interviewer Console will then be ready to start the next available interview. If no interviews are assigned then the console will display a message suggesting you wait for the next one to be assigned.

To handle an appointment forced in the course of an interview:

1. When the Appointment dialog is displayed automatically in the course of an interview then it was planned to be displayed by the person who designed the survey.

   This is a regular Appointment window. In this situation, treat it as if you are going to create an appointment yourself. You may create the appointment, in which case the interview will finish as an appointment, or you may cancel this appointment, in which case the appointment window will close and the interview will continue.

6.8.5. Performing Call Transfers

A system administrator may enable the Call transfer functionality. This requires two separate functions to be enabled: Internal and External call transfer. Internal call transfer allows the interviewer to transfer a call to another interviewer working in the same company (go to Internal Call Transfer on page 276 for more information). External transfer allows a call to be transferred to any telephone number that is specified in the CATI Supervisor External Transfer list by a supervisor (go to External Call Transfer for more information).

An Internal call transfer can be enabled separately, or together with the External Call Transfer. In the first case, only the **Internal Call Transfer** button becomes available in the Interviewer Console toolbar; when both Internal and External call transfer are enabled the **External Call Transfer** button also becomes available.

A call transfer can be either Blind or Warm.

- A "Blind" call transfer supposes no interaction of the initial interviewer with the target transferee. The initial interviewer is disconnected from the call as soon as they click the **Transfer** button, and the system takes over the transferred call and handles it. The initial interviewer is then free to resume interviewing with new records. Note that once a call transfer is initiated in blind mode it cannot be canceled.
- A "Warm" call transfer means the initial interviewer contacts the target interviewer prior to transferring the call. The CATI system provides the initial interviewer with the options of establishing independent contact with a respondent, contacting the target interviewer, or holding a three-way conversation with both of them.

The type of call transfer which is initiated by default when a **Call Transfer** button is clicked depends on the option specified for the survey (go to Viewing and Modifying a Survey's General Properties on page 68 for more information). For Internal call transfers this can be Warm, Blind or Off. If Off is selected, the Internal Call Transfer button is grayed out and is unavailable. For the External call transfer the options are Warm or Blind with the default being Warm.

Interviews (calls) can only be transferred to another person once the interview has started.

6.8.5.1. Internal Call Transfer

When an interviewer wishes to transfer a call to another agent working in the same company, they click the **Internal Call Transfer** button while informing the respondent that the line will be switched. The type of call transfer which is initiated when this button is clicked depends on the corresponding option specified for the survey (go to Viewing and Modifying a Survey's General Properties on page 68 for more information).

Note that an internal call transfer may not be possible. There are two reasons for this:

1. The current company has no interviewer group with the appropriate "Allow call transfers" option enabled (go to Adding and Deleting an Interviewer Group on page 13 for more information)
2. There are no groups or interviewers in the current company assigned to this survey.

In this case a message is displayed explaining the reason for this. Click **OK** to close the message and return to the last interview question.

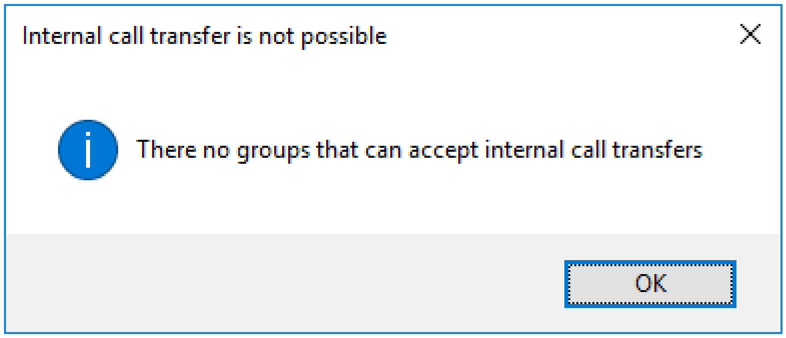


Figure 270 The message overlay

If the transfer is possible, the Internal Call Transfer window is displayed. The transfer type is indicated by the dialog name displayed in the title bar.

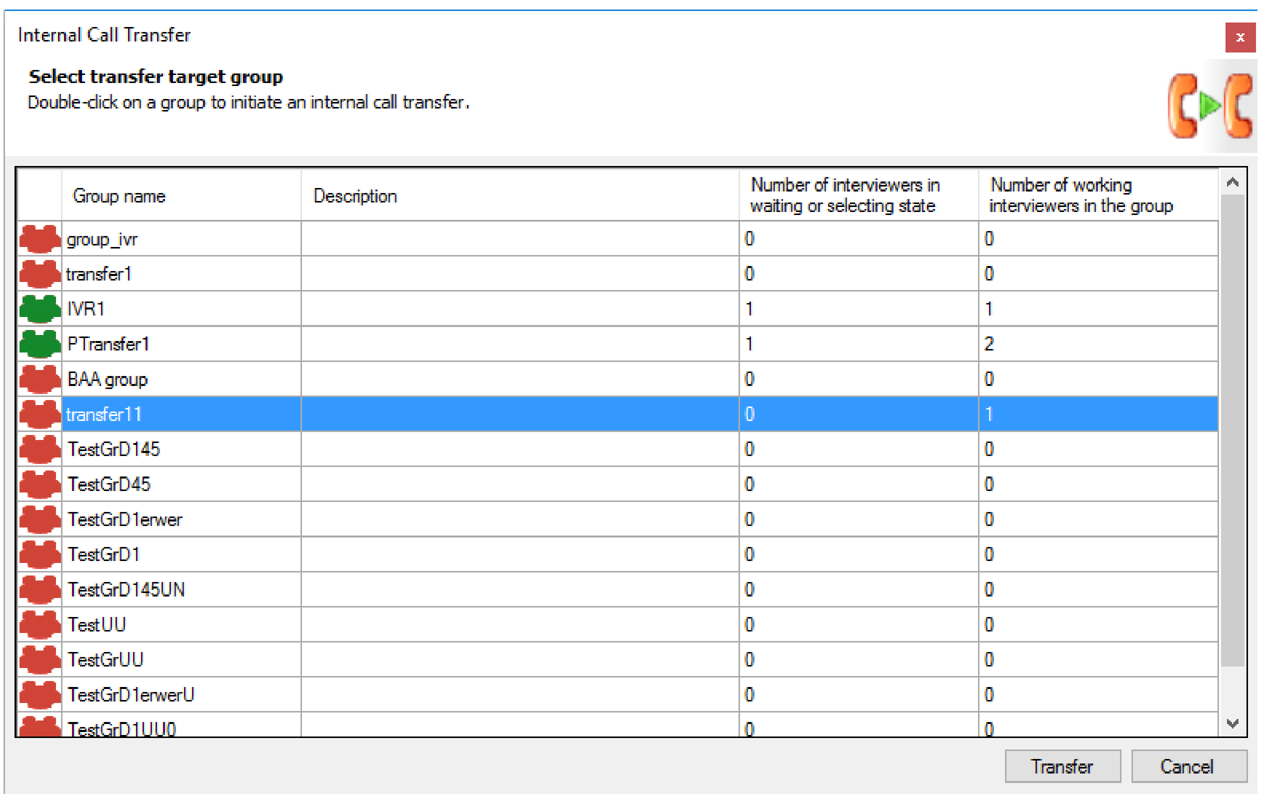


Figure 271 Example of the internal call transfer window

The Internal Call Transfer window contains a list of interviewer groups that belong to the same company as the current interviewer's group and are therefore considered "internal". An internal transfer can only be placed to a group, it is not possible to transfer to one specific individual. This list provides the following information:

- The name of the group.
- An optional description of the group.
- The number of interviewers in the "Waiting" or "Selecting" state shows how many interviewers are free or are potentially available to accept the transferred interview at the particular moment.
- The number of working interviewers in the group - shows how many interviewers belonging to the group are currently logged into the interviewer console.

The interviewer numbers will be constantly changing, but the icon in the left column indicates whether a group has interviewers who can potentially accept a transferred call (who are currently in the Waiting or Selecting state). When the icon is red the group currently has no free interviewers and so it is less likely the transfer can be picked up quickly. When the icon is yellow the interviewer may consider this group if there are no better candidates, an interviewer may be free soon. A green icon means interviewers are currently free and an interview can be transferred to this group immediately.

To start the Call transfer operation the interviewer clicks the **Transfer** button in the lower-right corner of the Internal Call Transfer window. The Internal Call Transfer window then closes. Depending on which call transfer mode has been assigned to the interviewer the rest of the call transfer procedure will be as follows.

Internal Blind Call Transfer Mode

The interviewer will receive no further notice regarding the transferred interview. If this interviewer has more calls assigned then another interview will be started for them .

Internal Warm Call Transfer Mode

The Internal Warm Transfer dialog opens.

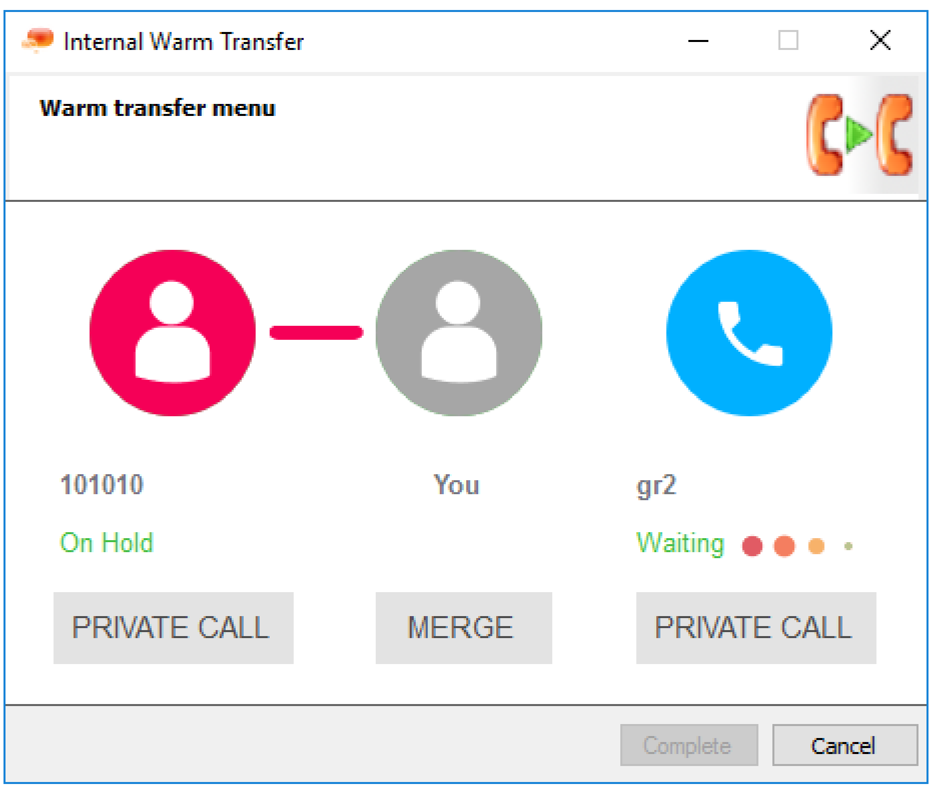


Figure 272 The Internal Warm Transfer dialog

The system first attempts to connect the initial interviewer to the target interviewer. While the system tries to establish a connection the respondent is automatically put on hold. In the dialog the "Waiting" sign is displayed on the target interviewer side while the system attempts to connect the initial and target interviewers. No other call options are available until the connection is either established or refused - all buttons in the dialog are unavailable.

The image above illustrates the situation when the initial interviewer is waiting for the connection to be established with the target agent.

Note that the receiving interviewer cannot cancel the call transfer. They see the following notification displayed on the Interviewer Console main screen when a transferred call is delivered.

Figure 273 Notification displayed in the Interviewer Console to inform the target agent of the incoming call transfer

Once the connection is established they can talk to the initial interviewer and the "Private Call" button on the side of the respondent becomes active alongside the "Merge" button.

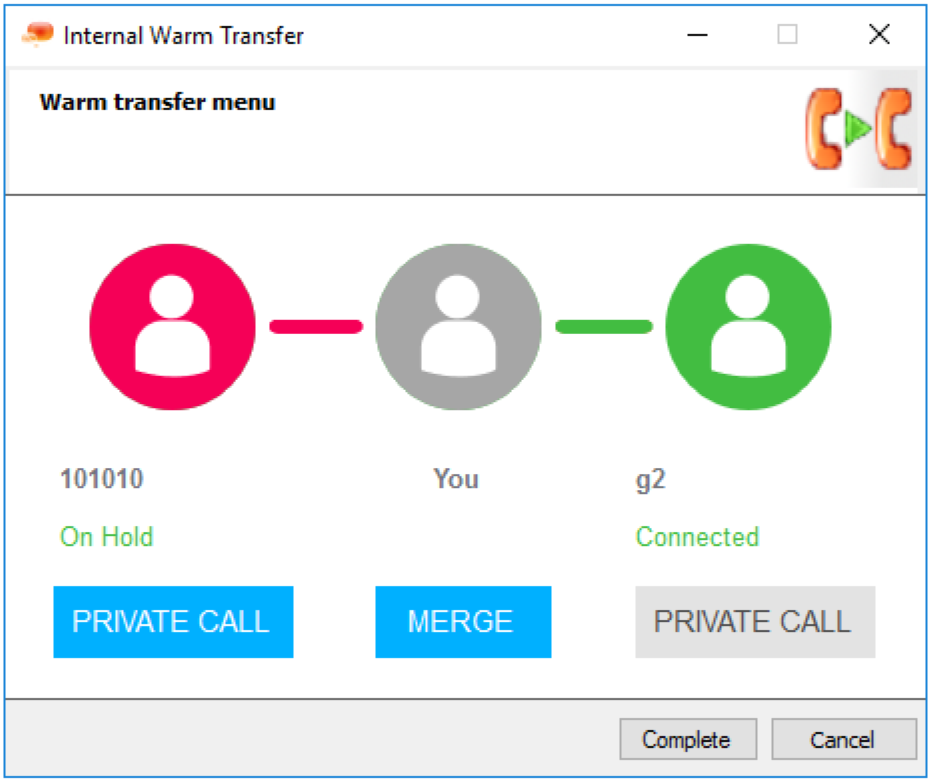


Figure 274 Connection with the target interviewer is established

The initial interviewer can click the **Private Call** button to talk to the respondent in private if there is a need. Another option is to click the **Merge** button - this creates a three-way conversation where both agents and the respondent can talk and hear each other.

When the initial interviewer clicks **Private Call** and connects to the respondent, they are automatically disconnected from the target interviewer. The **Private Call** button on the side of the target interviewer then becomes active while the **Merge** button stays active - see below.

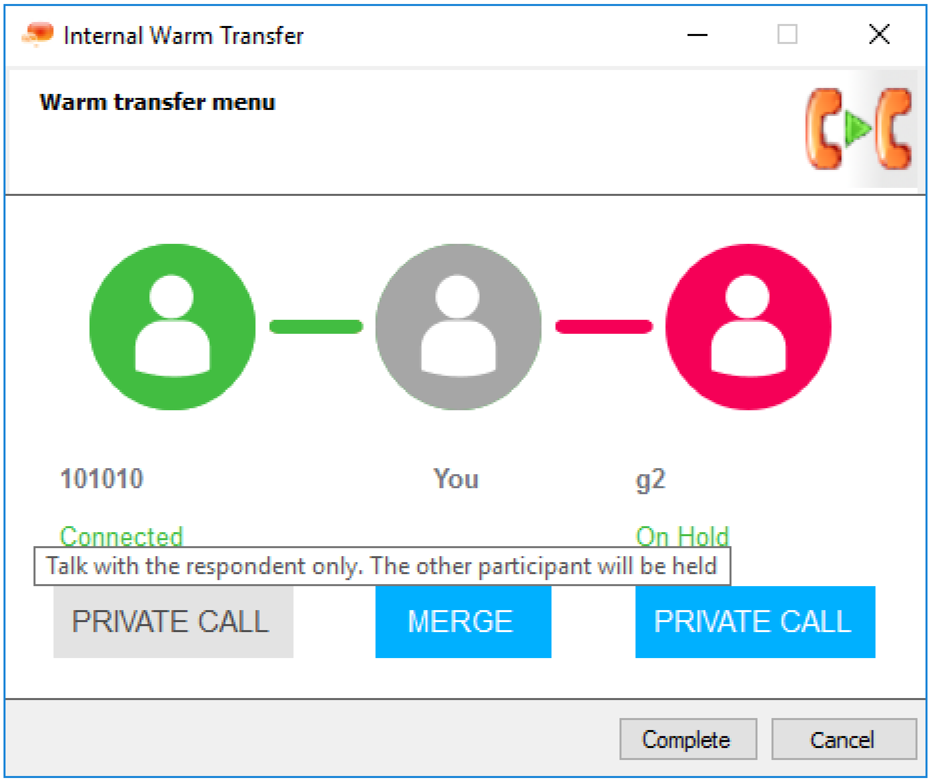


Figure 275 The interviewer is talking with the respondent

When the **Merge** button is clicked, a three-way conversation is initiated where all parties can hear each other - see below.

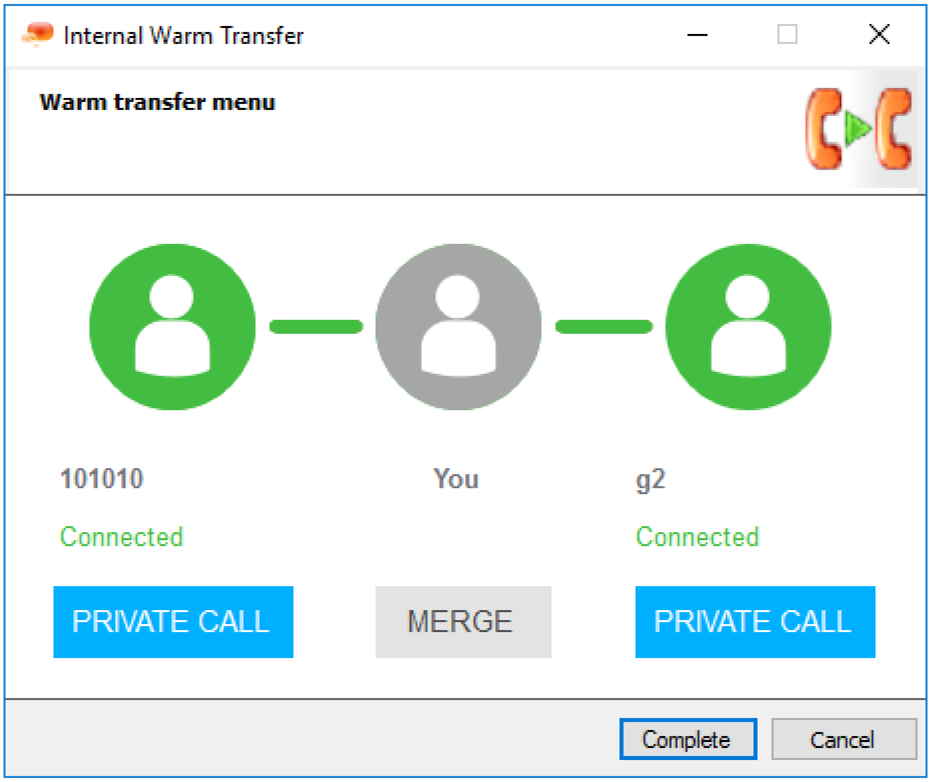


Figure 276 The initial interviewer clicks Merge - all parties can communicate with each other

When **Merge** is clicked the system makes available the **Private Call** buttons on both the respondent and target interviewer sides. The initial interviewer can switch to a private conversation with either party.

Tooltips appear when the mouse pointer is hovered over the dialog buttons to explain the button's actions.

The final action for the initial interviewer is either to switch the interview to the target interviewer by clicking **Complete**, or cancel the call transfer procedure by clicking **Cancel**.

When **Complete** is clicked the initial interviewer is disconnected from both the respondent and the target interviewer. The interview is considered finished for him/her and they become free for the next interview.

Note that once **Complete** is clicked the call is completely transferred. This action cannot be undone and the initial interviewer loses control over the procedure by passing it over to the target interviewer.

6.8.5.2. External Call Transfer

When an interviewer needs to transfer a call to a third party agent, they inform the respondent that the line will be switched and then click the **External Call Transfer** button . The External Call Transfer window is then displayed.

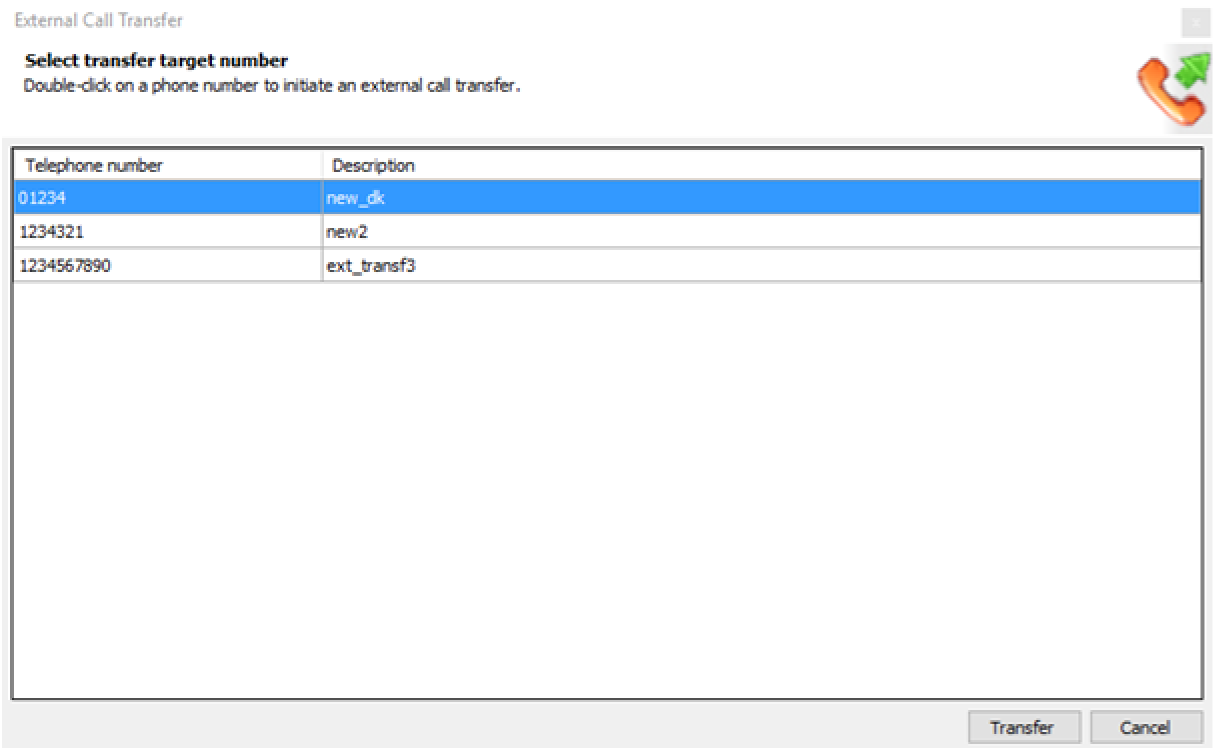


Figure 277

The External call transfer is made to a telephone number which is assigned to this (current) survey on the Resources/External Transfer tab in the supervisor UI (go to Configuring the External Transfer Settings on page 376 for more information).

The External Call Transfer window contains a list of telephone numbers which belong to third-party companies and are considered "external". The list provides the following information:

- **Telephone number -** the external telephone number assigned to the current survey;
- **Description -** an optional description of the telephone number.

The interviewer chooses a telephone number from the list and clicks **Transfer** in the lower-right corner of the window. For a blind transfer the External Call Transfer window will then close and, if there are more calls assigned to this interviewer, another interview will be started for them. The interviewer will receive no further notice regarding the transferred interview.

For a warm transfer the warm transfer dialog opens. This looks and functions like the dialog described for the Internal Warm Call Transfer scenario (go to Internal Call Transfer on page 276 for more information).

6.8.6. Spell-Checking the Answers

The interviewer can check the spelling of "free text" answers. Spell checking can be invoked during both the interview and open-end review stages, and is performed for all text input areas on the current page.

The Spell Check function checks all the words against the built-in dictionary, and if it finds an incorrectly spelled word it highlights this word in the text and suggests a list of words that could be used to replace it. Any misspelled words are found and displayed in sequence, thereby allowing for consequent check and correction. You can ignore a single error or all discovered errors in the event of a false positive reaction.

To check the spelling of all the words in the text fields on the current page:

1. When you have completed typing the text, and after you have pressed **Enter** (so that the text appears in the corresponding field on the interview page), either click the **Spell check** button  on the toolbar or press **F7** on your keyboard.

   The Spell Check dialog opens.

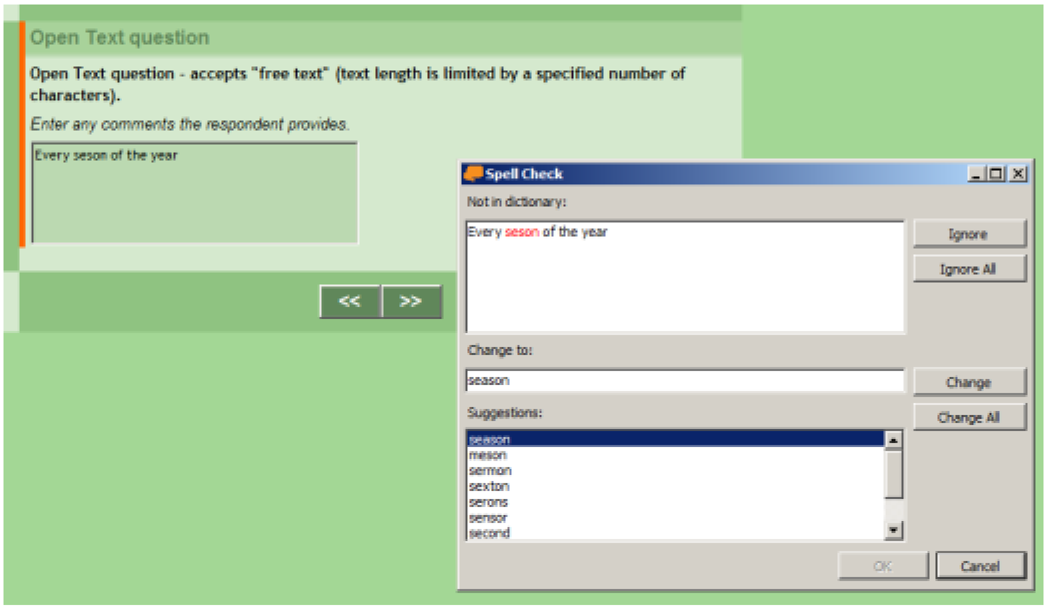


Figure 278 The Spell Check dialog

The Spell Check dialog contains three fields and a set of buttons.

- The Not in dictionary field displays all the spelling errors found in all the text fields on the current page.
- The Change to field allows you to enter the word you wish to change the error to.
- The Suggestions field displays the list of words that CATI Interviewer Console suggests to use instead of the incorrectly spelled word.

  A set of buttons located to the right of the listed fields allows you to apply the selected changes or leave the word as it is.

2. After the Spell Check dialog is invoked it displays the first answer (the complete answer text) containing an error. The erroneous word standing first in this piece of text is highlighted in red.

   The Spell Checker suggests a list of words that could be used in place of the misspelled word. These suggestions are shown in the Suggestions field.

   The word that selected in the Suggestions list is displayed in the Change to field. This field is open for editing - the interviewer can edit the word as required. The word from the Change to field is used to replace the highlighted misspelled word.

3. Click **Change** to replace the highlighted misspelled word.

   The highlighted word in the Not in dictionary field is replaced by the word from the Change to field and the highlighting is then removed.

   To leave the highlighted word unchanged, click **Ignore**. The highlighting is removed.

   If you know there are other words in the current answer text which are identical to the highlighted word, you can click **Change All** to replace all similar inclusions simultaneously or **Ignore All** to leave all the identical words unchanged.

4. After you click either the **Change** or the **Ignore** button, the Spell Checker highlights the next misspelled word in the same answer text. Repeated for that word.
5. When all misspelled words in the answer text are processed, the Spell Checker removes the processed answer text from the Not in dictionary field, and displays the next answer containing misspelled words (if any). Repeat the procedure for all misspelled words.

When the Spell Checker cannot find another answer containing misspelled words, it blanks all the fields and displays the "Spell check complete" message. The **OK** button in the Spell Check window becomes active.

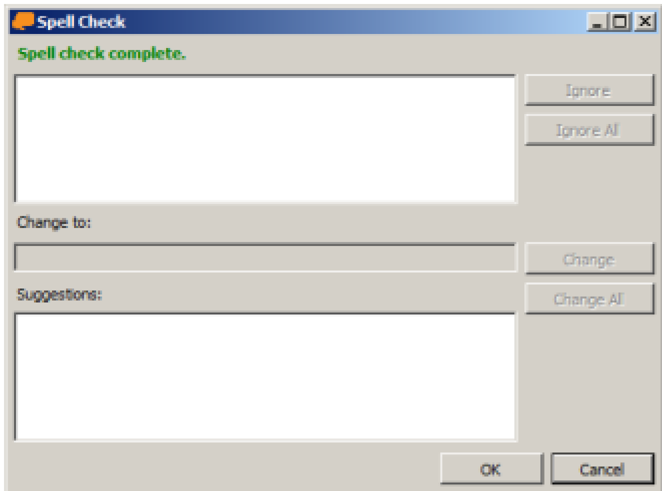


Figure 279 Spell Checker - when the spell checking procedure is completed

6. Click **OK** to submit all the corrections you have made using the Spell Check window, or click **Cancel** to discard all the changes.

   Note that you can run the Spell Checker any number of times.

Important!
Changes that you apply while the Spell Check window is opened are not applied to the answer text displayed on the interview page; they are shown in the Spell Check window fields. The answers on the interview page are updated only when you finally click OK and close the Spell Check window.

6.8.7. Modifying an Answer

The Redo and Fast Forward commands.

If the answer the interviewer has entered for one of the previous questions of the current interview is considered incorrect for any reason, the interviewer is able to return to that question and select another answer.

CATI Interviewer Console also allows the interviewer to quickly move back to the first question in the interview for which no answer has been provided.

To modify an already entered answer:

1. Click the **Redo** button .

   A drop-down menu listing all the answered questions (by question name) from the current interview opens.

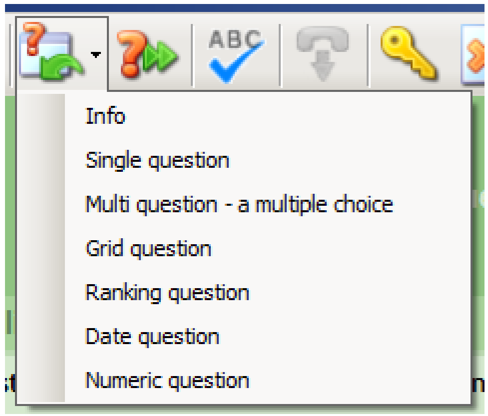


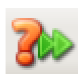
Figure 280 The Redo button drop-out menu

2. Select the required question.

   The selected question is displayed in the work area in place of the current question. The displayed question will contain the old answer.

3. Choose the desired answer from the list.

Next you can either:

- click the **Next** button in the interview page, or
- click the **Fast Forward** button  on the toolbar. This takes you to the first question in the interview for which no answer is yet provided (see below for details).

To skip to the first question page for which no answer has been provided:

1. Click the **Fast Forward** button  on the toolbar or press **Ctrl+Enter** on the keyboard.

   The work area is refreshed and the first question in the interview for which no answer has been provided (from the beginning of the interview) is displayed.

Note that this is not necessarily the question you left from to perform the Redo command.

6.8.8. Selecting the Interview Language

The interviewer can select the language in which the interview questions and answers are presented in CATI Console. The language choice can be performed independently for each interview. Languages are selected from the list of those available for the current survey.

To select the interview language:

1. When the interview is started and the first question is displayed in the work area, choose the required language from the Language drop-down list on the toolbar.

   The default language is set up in the survey's properties.

   When a language is selected in the Language drop-down box, the work area refreshes, and the interview questions and answers are presented in the chosen language.

6.8.9. Sound Playback Audible to a Respondent

The CATI Interviewer Console allows the interviewer to play sound files to a respondent. This could for example be a jingle, recorded speech - anything that aids the interviewing procedure.

The name and location of a sound file that can be played for a respondent is an option which can be specified for each survey page when it is composed in the Authoring application. The survey author also specifies whether the sound file is to be played automatically or started manually by the interviewer.

Note that sound file playback is available only if your company uses a dialer and the dialer is used by the interviewer. Sound playback is available with dialers of both types - TCI and Pro-T-S; playback functionality in both cases is similar, the only difference being that the **Pause** button is not available with the Pro-T-S dialer system.

If the CATI Interviewer Console encounters a link to a sound file when a question page is being loaded, it displays toolbar buttons to control the playback - **Start** , **Pause** and **Stop** . These buttons are available regardless of the playing mode specified for the sound file (Automatic or Manual). In addition, for TCI dialers, a **Toggle Voice Source** button is displayed to allow the interviewer to switch between voice and the audio file - see below.

- If a sound file is to be played automatically, the CATI Interviewer Console starts the playback when the question page is loaded. When the next page starts loading, the CATI Console checks for a sound file specified for that page. If no file is specified it stops the playback, if another file is specified it stops playing the previous file and begins playing the currently specified file, and if the specified file is same as the one specified for the previous page it continues playback of this file.
- If the sound file is to be started manually the CATI Interviewer Console displays the playback control buttons in the toolbar and the interviewer can start the playback at any time while the question page is displayed in the CATI Console window.

The interviewer controls the sound file playback using the toolbar buttons, both in the Automatic and in Manual playback mode. Note that the **Start** button will restart the file from the beginning if clicked while playback is in progress.

If an audio file is played during the course of the interview, the interviewer stops hearing the respondent over the telephone line and can hear only the sound file being played. If a TCI dialer type however the interviewer can switch between sound sources; they can choose whether they hear the sound file being played or the respondent's voice. The interviewer is free to toggle between these two sources while the interview continues. This facility is not available with the Pro-T-S dialer types.

How to run a sound file:

1. Start the interview.

   While an interview page containing a link to a sound file is displayed in the CATI Interviewer Console, additional buttons will be visible in the toolbar (ringed).

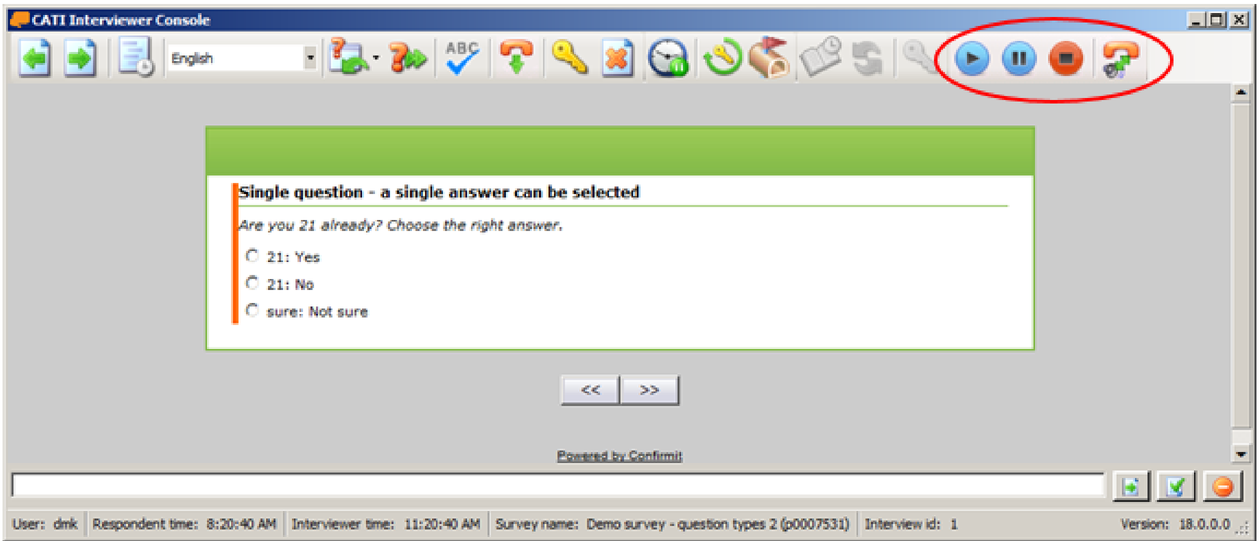


Figure 281 Example of the interviewer console with the audio playback buttons

Depending on the specified playback mode, the audio file will either start playing back automatically when the page is loaded, or the interviewer must start the playback manually by clicking the **Play** button .

The interviewer can pause, stop, or restart the playback by pressing the appropriate buttons.

When the interviewer clicks the **Next**, or **Previous** buttons, the console checks if there is a sound file link on the page that starts loading and will act appropriately (see above).

When the audio playback is running the interviewer cannot hear the respondent. If the **Toggle Voice Source** button is available, use this to toggle the source. Note that the respondent will not hear the interviewer's voice.

6.8.10. The Redial Functionality

The CATI Interviewer Console provides Redial functionality if the interviewer needs to redial a number, for example to restore a broken phone connection or to switch to another telephone line at the respondent's request.

Note: This functionality is not available for surveys which are set up in the Manual dial mode or for interviewers working in the Manual Interviewing mode.

The Redial function allows the interviewer:

- to redial the default phone number.
- to enter and dial any other phone number.

Note: The default number is the original number loaded to the 'TelephoneNumber' system field as background sample data.

The Redial functionality does not interfere with the interviewing process in the CATI Interviewer Console. When the Redial function is used, the interview which is currently in progress continues as usual. The current interview page is displayed in the Console window and this interview is continually timed. The time spent on redialling is counted as time spent on the current interview.

Click the **Redial** button to start the process. Show or hide the **Redial** button for the interviewers using the **Show Redial** button in Interviewer Console Resources tab > Settings section (go to Configuring Settings Related to the Entire Company on page 447 for more information).

If the current survey is set up in Preview or Hybrid dial mode, the **Redial** button becomes available only after the call is connected. For surveys set up in Automatic and Predictive dial modes the button is always available.

Note that redialling drops the current telephone connection (if one exists).

To use the Redial function:

1. Click the **Redial** button  on the CATI Interviewer Console toolbar.

   The Redial dialog opens.

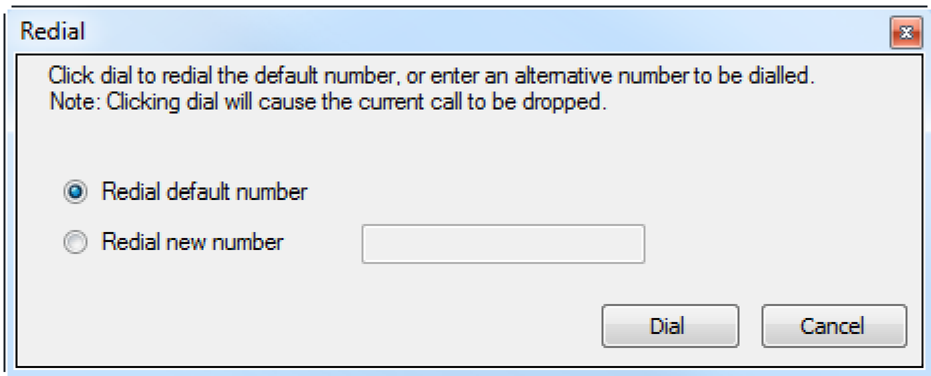


Figure 282 Using the Redial feature

- Select "Redial default number" to redial the current number.
- Select "Redial new number" to dial an alternative number, and enter the desired phone number in the field (only digits are allowed in this field). When you click **Dial** the phone number you enter is checked for validity and if an unsupported symbol is found the procedure is halted and a warning is given.

2. Select the required Redial option and enter an alternative phone number if necessary, then click **Dial**.

   The current telephone connection (if one exists) is dropped. The dialog will remain on screen until the call has been connected. While dialing is in progress a ‘dialing in progress’ message is shown and the buttons are disabled. If the call is not connected an outcome code will be displayed and the buttons are enabled. The Interviewer can then retry the redial procedure if required. If the call is connected successfully the dialog closes.

   The interviewer can repeat the redial procedure as many times as required.

When an alternative phone number is dialed for a respondent, if the survey includes an optional 'Open text' variable called ‘AlternativeNumber’ then the number will be saved for that respondent regardless of the call outcome. If the ‘AlternativeNumber’ variable does not exist, alternative numbers are not recorded and no message is shown. Nothing is written to the ‘AlternativeNumber’ variable when default numbers are dialed.

Note that only the last attempt to dial an alternative number for each respondent is saved to the ‘AlternativeNumber’ variable. If another alternative number is dialed for the same respondent, the previously stored number is overwritten with the new number.

The ‘AlternativeNumber’ variable can be used as a CATI filter. Refer to the Forsta Scripting Manual for more information regarding the ‘AlternativeNumber’ survey variable.

6.8.11. Hanging Up the Respondent Line

When a dialer is used, the interviewer can hang up the respondent line during an interview by clicking the **Hang up the respondent line** button . This action may for example be necessary if the respondent decides not to continue the interview. If a dialer is not used then this option is not available. The "Hang up respondent line" command can be executed for dialers of both TCI and Pro-T-S types.

When the interviewer executes the "Hang up" command, the telephone line is closed but the interview remains active, no other action will follow. After the interviewer hangs up the respondent line they can for example create an appointment for the respondent or terminate the interview as appropriate.

To hang up the respondent line:

1. Click the **Hang up the respondent line** button  on the CATI Interviewer Console toolbar, or press **Ctrl+H** on the keyboard.

   A confirmation message is displayed.

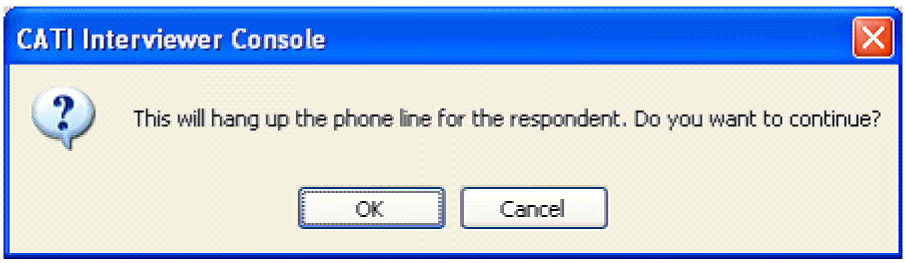


Figure 283 Confirming the respondent line hang up

2. Click **OK** to hang up the respondent line or **Cancel** to continue the call.

6.8.12. When an Interview is Aborted due to a System Error

There may be a situation when the CATI Interviewer Console aborts the interview without an obvious reason. This will usually be due to a system error.

If a survey finishes with an error status, the CATI console does not automatically submit the page. Instead the console presents a message to inform the interviewer that a system error occurred which stopped the interviewing process.

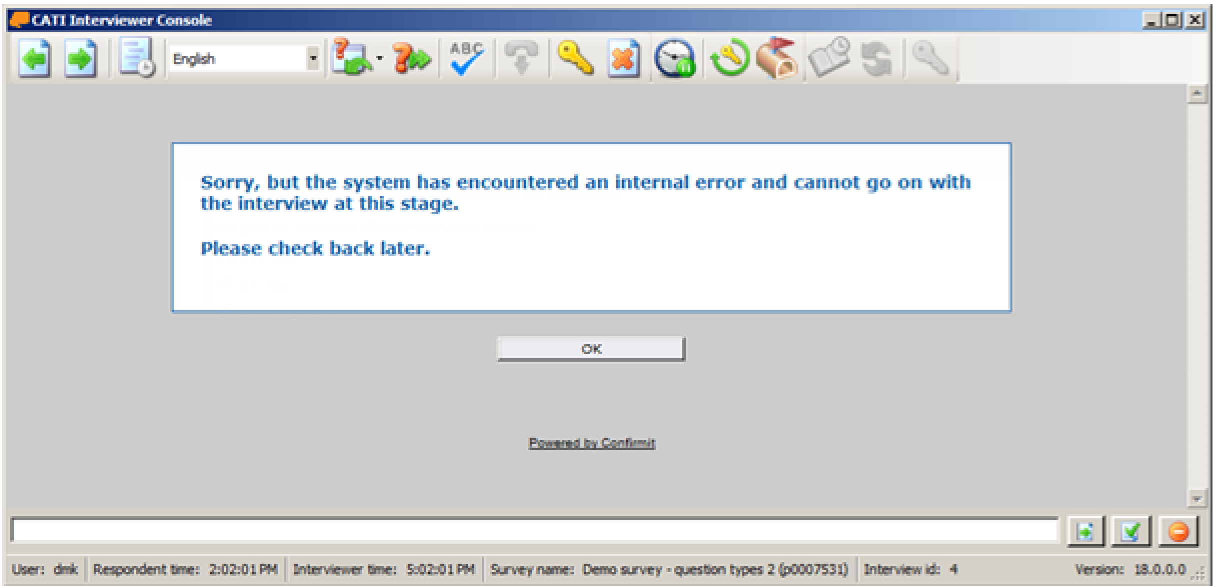


Figure 284 Error message displayed when a survey finishes with an error status

The interviewer should click **OK** which will open a new interview or an interview selection screen depending on the current interviewing mode.

6.8.13. Terminating an Interview

The interviewer may need to terminate the current interview before it is finished. The terminated interview is then assigned the **Terminated** extended status, and it will not be assigned to another interviewer until the supervisor reassigns it.

Be aware that the interviewer can also shut down the CATI Interviewer Console while the interview is in progress. This will close the Interviewer Console window and abort communication with the respondent, but will not terminate the interview and will not finish the interviewer's session. This is not a normal procedure - see the note below.

Note: While the interviewer can shut down the CATI Console by clicking the Windows Close button in the upper-right corner of the window, this is not the correct way to close CATI Console. When CATI Console is closed in this manner the current interviewer is not logged out, and a message is displayed asking if you want to proceed and warning you that you will not be logged out.

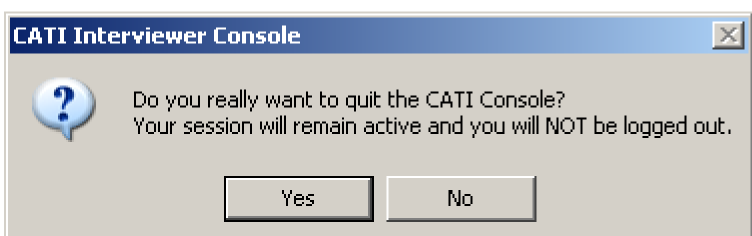


Figure 285 Warning message for irregular closure

Click **Yes** to confirm the closure or **No** to cancel, close the dialog and continue working in CATI Console. If you choose to shut down the application, CATI Console will display a warning message the next time you log in, and you will have to continue the terminated interview.

Figure 286 Warning message on reopening

To terminate an interview:

1. Click the **Terminate** button  on the toolbar, or press **Ctrl+X** on the keyboard.

   A message is displayed asking you to confirm the action.

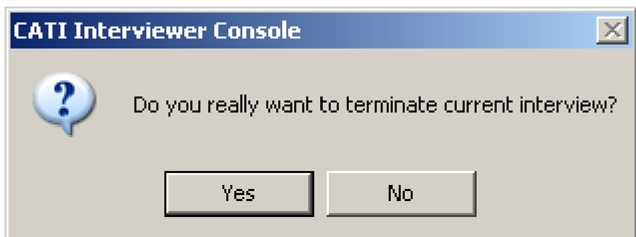


Figure 287 Warning message displayed upon intentional interview termination

2. Click **Yes** to terminate the current interview or **No** to stop the closure process and continue working with the interview.

   When the current interview is terminated, CATI Console starts the next assigned interview. If there are no further interviews assigned, CATI Console a message is displayed.

6.8.14. Interview Terminated by the Supervisor

The supervisor can terminate an interview that is in progress. In this case the interviewer whose work has been terminated will see the following warning message.

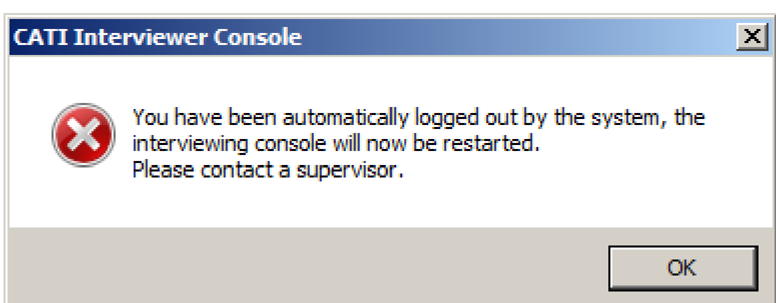


Figure 288 Message to interviewer on being terminated by a supervisor

The interviewer should click **OK**. This will restart the CATI Interviewer Console and the interviewer will have to log in again to continue working. The interviewer should contact the supervisor to learn the reason why the interview was terminated.

6.9. Logging Out and Closing the CATI Console Window

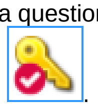
There are a number of ways the interviewer can log out of CATI Console.

The interviewer can log out of the CATI Console after finishing an assigned interview. Although different Interviewing modes give different CATI Console behavior after the current interview is finished, the user can always instruct the CATI Console not to start the next interview and to log them out after the current interview is finished.

In all cases, after the interviewer logs out of the CATI Console the “Logging out. Please wait” message is displayed, the main window is closed, and the Log in screen then appears. At this point the Interviewer can either log into CATI Interviewer Console again or close the log in pane to shut down the application.

To log out after the current interview is finished (delayed logout):

1. When working with the current interview in any interviewing mode, click the **Log out after finishing the current interview** button  on the toolbar or press **Ctrl+Q** on the keyboard.

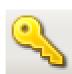
   The button and the hot key combination become available only when an interview is started and the work area displays a question. When the button is clicked it changes to indicate that the delayed logout mode has been activated .

2. Finish the interview.

   You can also create an appointment, then after the appointment is made CATI Console will log you out of the current session.

To log out when working in the Manual Interviewing mode:

When the current interview is finished in the Manual Interviewing mode, CATI Console displays the Survey/Interview selection pane.

1. Click the **Log out** button  on the toolbar.

   This button is available only while CATI Console displays the Survey/Interview selection pane.

   CATI Console will log you out of the current session.

To log out when no interviews are available after logging in:

When you log into CATI Console and no interviews are currently assigned to you, you can either wait for new interviews to be assigned, or log out. See the Automatic Mode, Survey Selection Mode, and Manual Selection Mode chapters for the logout options in this situation.

To log out after making an appointment:

The Appointment dialog which appears when you choose to make an appointment (go to Making an Appointment on page 274 for more information) allows you to log out of CATI Console after you have defined the appointment details. When the Log out box in the Appointment dialog is checked, CATI Console will log you out after you click **OK**.

The interviewer may also need to shut down the CATI Console. This method is not a recommended way to finish the work session, but if the situation requires the interviewer can click the **Close** button or press **ALT+F4** on the keyboard to close the application window. In this case CATI Console will display a warning message.

Note that CATI Console DOES NOT treat this procedure as the logout routine, and a message is displayed to warn the interviewer that he/she will not be logged out after the application window is shut down.

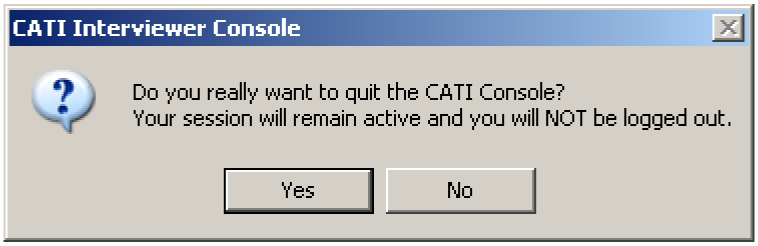


Figure 289 Warning message displayed when the interviewer shuts the CATI Console window

Click **Yes** to close the CATI Console window or **No** to cancel the command.

If the previous session was terminated in this way, a message will be displayed the next time this interviewer logs in (go to Selecting a Survey/Interview on page 252 for more information).

7. Monitoring in the CATI Supervisor

Note: This functionality is only available if the CATI Monitoring Console application is installed and launched on the Supervisor's machine.

The CATI Supervisor module allows the supervisor to monitor all types of activities involving CATI objects.

1. Click on the **Activity Views** tab then select the required view in the resulting menu. The selected Activity View opens in a separate window.

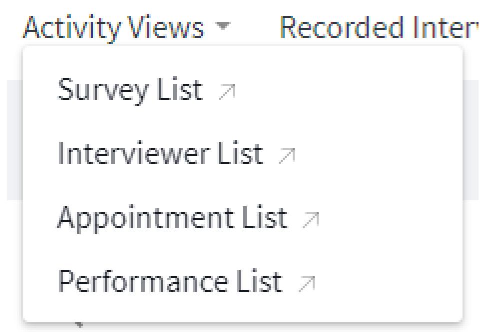


Figure 290 The list of available activity views

As an example, the Interviewer List view allows the supervisor to monitor the interviewing process for any interviewer working in the supervisor's company. The supervisor can observe the interviewers' work, which interview was selected by the interviewer, how much time was spent on each question, and other times and statistics regarding the interviewing process.

7.1. Monitoring Surveys and Survey-Related Events

To monitor surveys and survey-related events, go to **Activity Views > Survey List**. The Survey List dialog opens. Note that by default the Survey List activity view shows the "Active" surveys only. These are the surveys that have at least one interviewer currently performing an interview. To display all currently opened surveys disable the "Active Surveys only" option.

You can choose to display particular surveys only - click the **Surveys** button to start selecting surveys (go to Selecting Surveys for the Survey List Activity View on page 297 for more information).

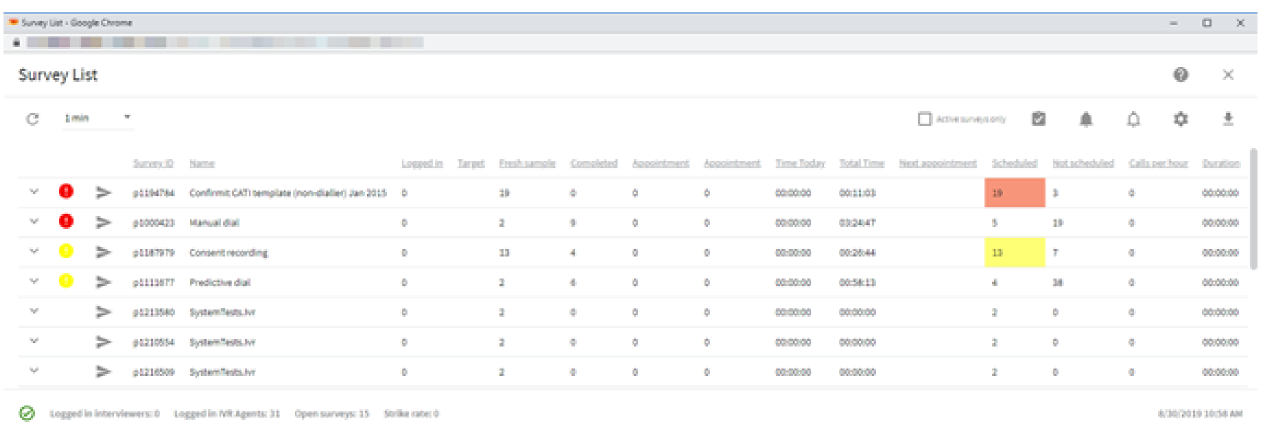


Figure 291 Example of the Survey List dialog

The Survey Activity View does not provide a context menu for a survey.

The Survey List dialog provides the following information:

Note that the grid may not show all the listed columns; the supervisor can select which columns are displayed.

- **Survey ID -** the survey's ID number.
- **Name -** the name of the survey.
- **Logged in -** the number of currently logged in interviewers.
- **Assigned -** the number of interviewers assigned to this survey.
- **Target -** the target number of completed interviews for the survey. This is set on the General tab in the Survey list (go to Viewing and Modifying a Survey's General Properties on page 68 for more information).
- **Fresh sample -** the number of freshly uploaded interview records (records with the extended status set to "Fresh Sample").
- **Completed -** the number of interview records with the extended status set to "Completed".
- Three columns with configurable content - you can choose the extended status for which these columns will display the statistical figures.
- **Time spent -** the total amount of time spent since the first interview was started.
- **Next appointment -** the next appointment time.
- **Scheduled -** the number of scheduled calls.
- **Not scheduled -** the number of not scheduled interviews.
- **Strike rate -** the number of completed interviews in the past hour.
- **Calls per hour -** the average number of calls performed per hour.
- **Duration –** total amount of time spent since the survey was opened.

The first three columns contain the **Expand** button, the alert indicator, and the **Send Message** button. The **Expand** button opens the list of survey calls. The alert indicator displays alerts for different survey parameters (see Setting Up Survey Alerts and Setting Up Extended Status Alertsfor details). The **Send Message** button allows you to create and send messages to interviewers (go to Sending One-way Notification Messages to Interviewers on page 317 for more information).

The Status bar displays details of the number of currently logged in interviewers, the number of currently open surveys, the strike rate, and the current date and time in the local time zone. The Survey List dialog also contains a toolbar with the following buttons.

Button	Description	Function
	REFRESH	Manually updates the survey list.
Drop-down list	REFRESH RATE	Specifies how often the survey list is to be updated to reflect the most recent parameter values.
Check box	ACTIVE SURVEYS	Shows only surveys that currently have at least one interviewer performing an interview.
	SELECT SURVEYS	Displays the survey selection form. This allows you to select the surveys that are to be displayed in the list.

	SET SURVEY ALERTS	Displays the survey alert form. This allows you to specify alert thresholds for survey parameters.
	SET STATUS ALERTS	Displays the status alert form. This allows you to specify the alert thresholds for status parameters.
	COLUMN SETTINGS	Opens the Settings dialog. Here you can change the layout of the view by adding and removing columns.
	EXPORT	Exports the currently displayed survey list.

7.1.1. Selecting Surveys for the Survey List Activity View

Use the Survey Search form to choose which surveys are to be displayed in the Survey List activity view . This form enables you to search for surveys by name, or you can apply a filter to the survey list. In addition, you can opt to display all currently opened surveys or only those that are active. Note that the Survey List activity view displays only surveys that are currently opened. Surveys that are currently closed will not be included in the list.

To select surveys to be displayed in the Survey List activity view:

1. Display the Survey List window (go to Monitoring in the CATI Supervisor on page 295 for more information).

   By default the Survey List activity view window displays "Active" surveys only. These are surveys that have at least one interviewer currently performing an interview. If you wish to view all the opened surveys, clear the Active Surveys box.

3. Click the **Surveys** button on the toolbar.

   The Select Surveys dialog opens.

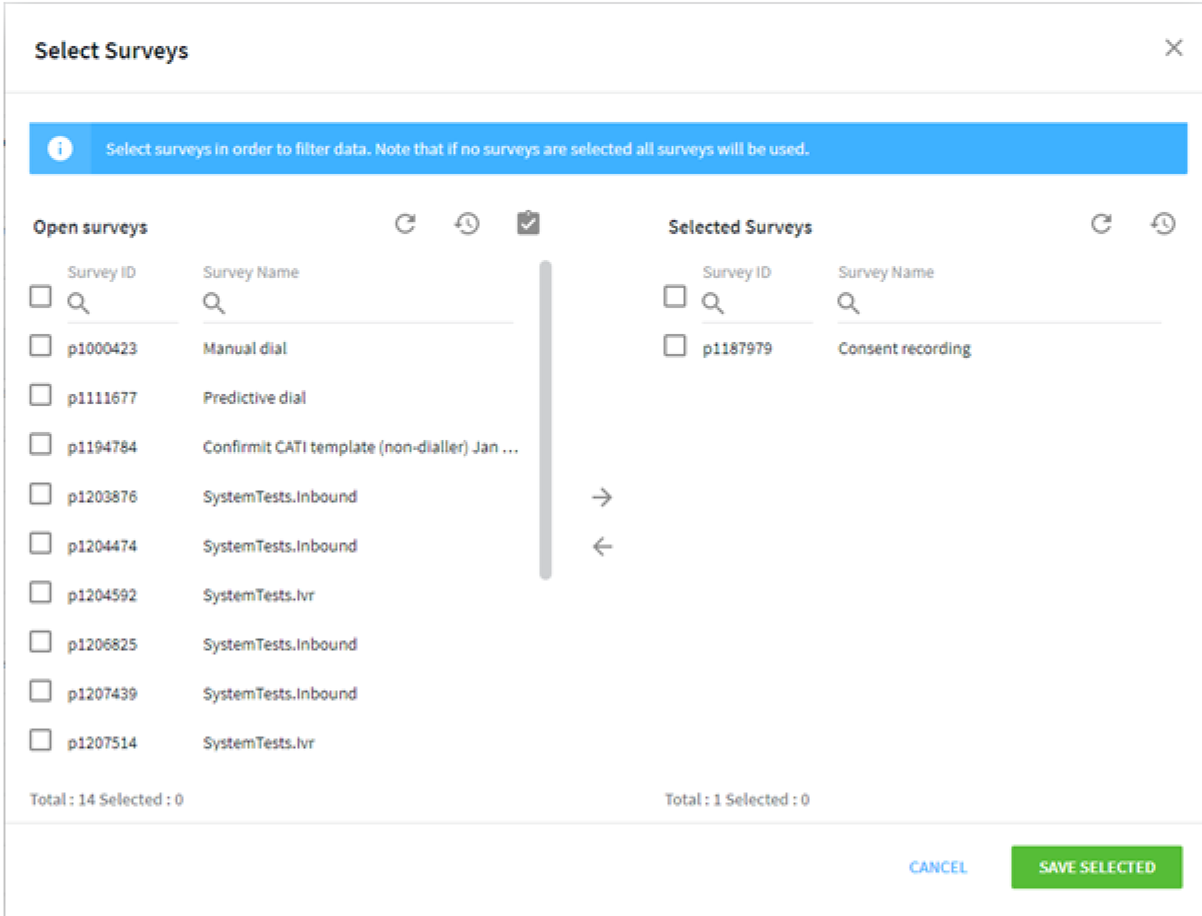


Figure 292 The Select Surveys dialog - selecting surveys to display in the Survey List

The list of all surveys which you can select is shown in the left pane (Open surveys), while the list of surveys which are already displayed is shown in the right pane (Selected surveys).

4. In the left pane check the boxes for all the surveys you want to select.
5. Click the right-arrow button to move the selected surveys into the list of selected surveys.

   Click the **Add open surveys** button to move all the open surveys simultaneously to the list of selected surveys.

   To remove surveys from the list of selected surveys, checking the boxes next to their names and click the left-arrow button.

Both panes can be configured simultaneously - check or clear boxes in both frames and click the arrow buttons.

All changes are introduced to the Survey List only after you click the **Save selected** button.

7.1.2. Configuring the Survey List Activity View

You can re-configure the Survey List to display only the information you need to see. The Column Settings dialog allows you to choose which columns are to be displayed. You can also include up to five columns to display call status counts for user-selected extended statuses. Note that this can be especially helpful when used in conjunction with the option to define an overall completion target, located on the **Survey view > General tab**(go to Viewing and Modifying a Survey's General Properties on page 68 for more information).

To configure the Survey List Activity view:

1. Display the Survey List Activity view.
2. Click the **Column Settings** button .

   The Column Settings page opens.

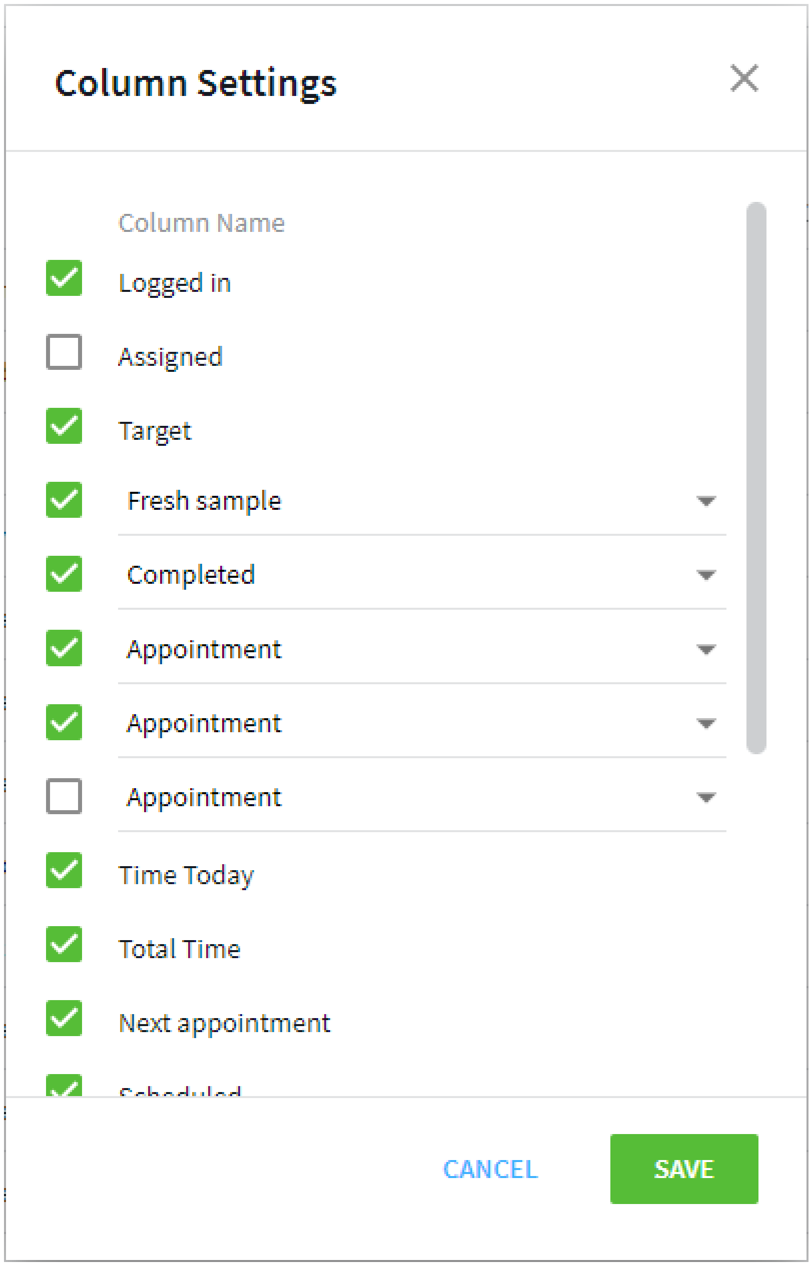


Figure 293 Configuring the Survey List Activity view

3. Tick the box beside the column you want to be displayed in the Survey List view, clear the box if you want to hide this column from view.

   Note that some statistics columns are available in two versions; one is calculated based on the last 15 minutes, while the other is calculated hourly. This last is indicated by "1h" next to the column name.

4. On completion, click **Save**.

7.1.3. Setting Up Survey Alerts

CATI Supervisor automates the monitoring process by providing a configurable visual alert facility. The second column in the Survey List Activity View shows the alert indicator. The indicator criteria are:

- When the monitored parameter value for a survey does not approach or exceed its specified threshold, the alert indicator cell for that survey is blank.
- When the parameter value reaches the specified warning threshold, the yellow indicator icon appears in this column.
- When the parameter value reaches the specified red threshold, the icon changes to the red icon .

The affected parameter cell is highlighted in the appropriate color.

CATI Supervisor automatically sorts the surveys in the grid according to the alert indicator state. Surveys marked with the red indicator are listed first, followed by surveys with the amber indicator. Surveys without alerts come below.

To specify alert parameters:

1. Click the **Survey Alerts** button on the window toolbar.

   The Survey Alert dialog opens.

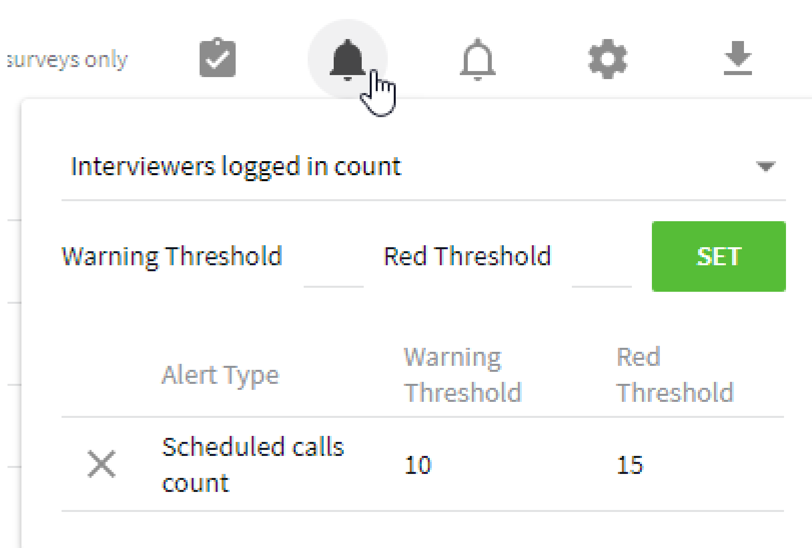


Figure 294 Setting up survey alerts

2. In the drop-down list choose the survey parameter to be monitored . This list includes parameters displayed in the grid columns.
3. Enter the warning and the red threshold values in the fields below.
4. Click **Set** to activate the specified threshold.

   The form expands to show the configured alert settings in a table. The Survey List view reflects the alert information the next time it is refreshed. If any alerts are triggered, the list will display the appropriate alert icons and highlight the corresponding cells (see below).

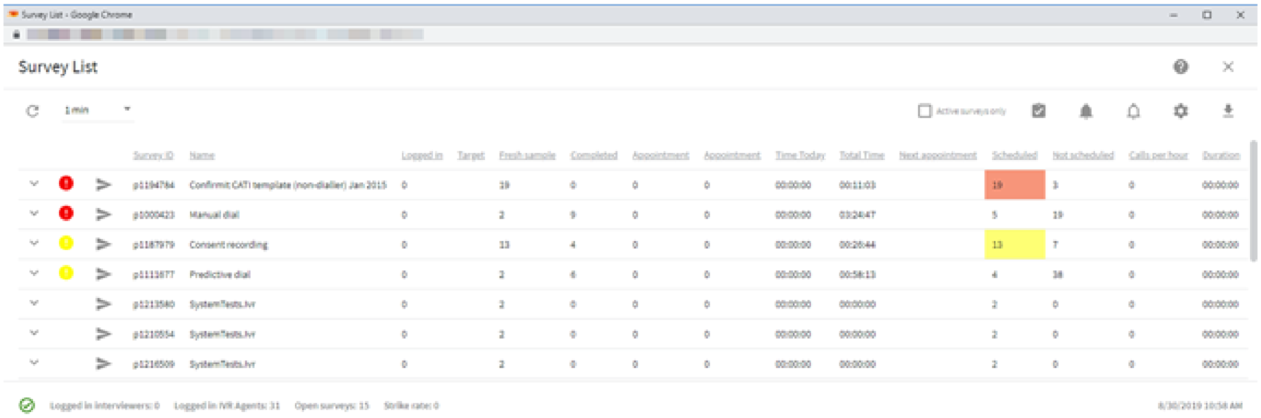


Figure 295 Survey List window displaying the configured survey alerts

5. Repeat the procedure for all required survey alerts.

   To edit the alert settings, click the **Survey Alerts** button, choose the required alert parameter in the drop-down list, edit values in the Warning and Red Threshold fields, then click **Set** to activate the modified alert.

To delete an alert parameter:

Click the **Survey Alerts** button, then click the red cross icon next to the appropriate alert row in the table. The alert is deleted from the table, and corresponding alerts are unmarked in the Survey List window.

7.1.4. Setting Up Extended Status Alerts

Status alerts are specified and monitored in the same way as survey alerts (go to Setting Up Survey Alerts on page 300 for more information). To specify extended alert parameters:

1. Click the **Extended Status Alerts** button in the window toolbar.

   The Extended Status Alert form opens.

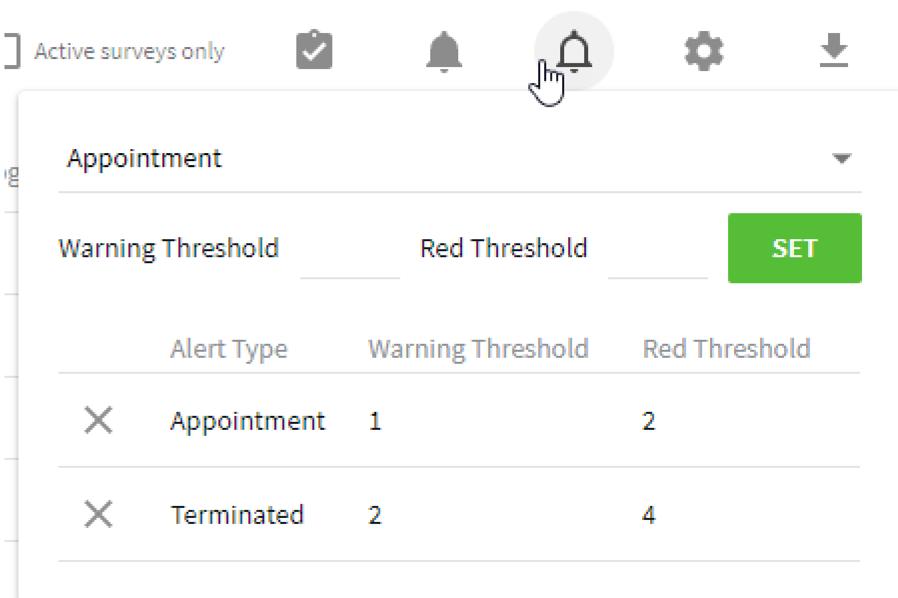


Figure 296 Setting up extended status alerts

2. Choose the extended status to be monitored from the drop-down list. This list includes only statuses that are not already being monitored.

3. Enter the warning and the red threshold values in the appropriate fields.

4. Click **Set** to activate the specified threshold.

   The form expands and shows the configured alert settings. The Survey List view will reflect the alert information the next time it is refreshed. If any alerts are triggered, the list will display the appropriate alert icons and highlight the corresponding cells.

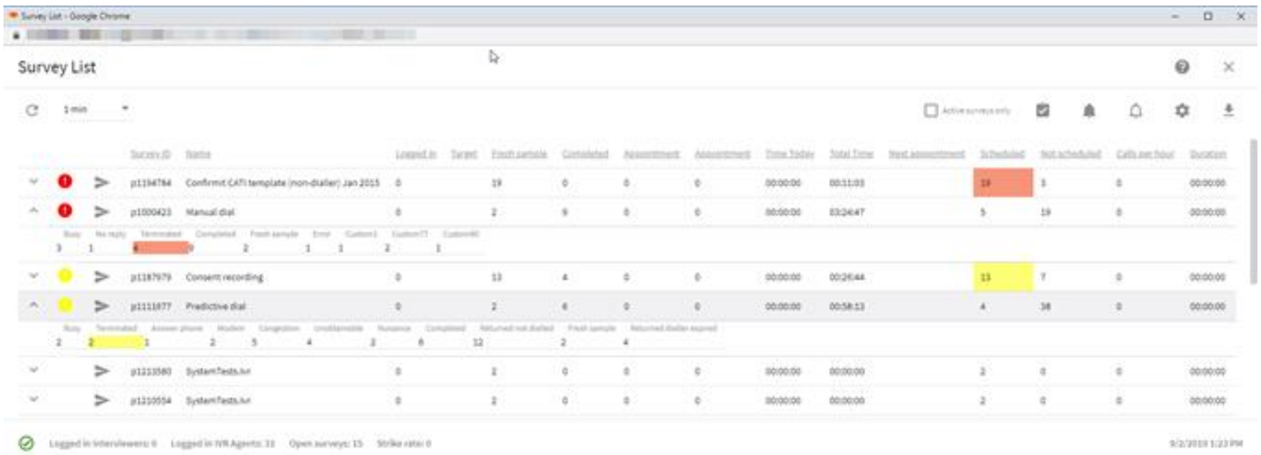


Figure 297 Setting up and monitoring extended status alerts

Note that the highlighted cells are shown in an additional grid row, which provides statistics regarding the extended statuses. By default the row containing the extended status statistics is hidden, so the Supervisor must expand it if it is needed. To do this click the **Expand** button in the left column (this then toggles to **Collapse**). The extra row shows information regarding the number of existing calls with different extended statuses.

7.1.5. Setting Up the Survey List Refresh Rate

You can instruct the CATI Supervisor to automatically update the Survey List activity view and get the latest values at a rate suitable for your requirements. To do this select the required refresh period from the Refresh rate drop-down list. A refresh rate of 1 minute is set by default.

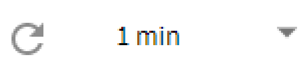


Figure 298 Changing the Survey List activity view refresh rate

You can also refresh the Survey List activity view manually by clicking the **Refresh** button next to the drop-down control.

7.1.6. Exporting the Survey Monitoring List

You can export the list of monitored surveys as an MS Excel sheet. To do this:

1. Display the Survey List activity view window (go to Monitoring Surveys and Survey-Related Events on page 295 for more information).

2. Choose surveys to include in the Survey List activity view (go to Selecting Surveys for the Survey List Activity View on page 297 for more information).

3. When the Survey List window shows information for the required surveys, click the **Export** button  on the window toolbar. The list of monitored surveys is then exported as a file in the MS Excel format.

7.2. Monitoring Interviewers and their Work

To monitor interviewers' and virtual IVR agents' work, go to the **Navigation frame > Activity Views** tab and choose the Interviewer List. The list opens in the Interviewer List window.

Note: Virtual IVR agents are listed separately and are not included in the "human" interviewers' list.

As a supervisor you can choose to view either the list of "human" interviewers or the list of virtual IVR agents. Toggle the **IVR Agents** box to switch between the two lists.

The Interviewer List window shows a list of the interviewers currently logged into the system. These interviewers can be either working with the CATI Interviewer Console module or on a break (go to Interviewer on a Break on page 272 for more information). Information about the interviewers is displayed, one row per interviewer. You can highlight a row by clicking on it to facilitate monitoring - the row remains highlighted even if the view refreshes and the interviewer moves up or down in the list.

When an interviewer logs out of the system or when they are logged out by the system automatically for any reason (for example the interviewer's job is terminated by the supervisor), the record is removed from the Interviewer List.

The virtual IVR agents are logged in permanently; when no interviews are pending they stay logged in and wait for an interview to appear.

Note that to monitor the interviewing process in real time you must start the Monitoring Console, which is installed and launched independently of the CATI Supervisor module. When the monitoring Console is not started, only specified alerts are displayed in the window grid.

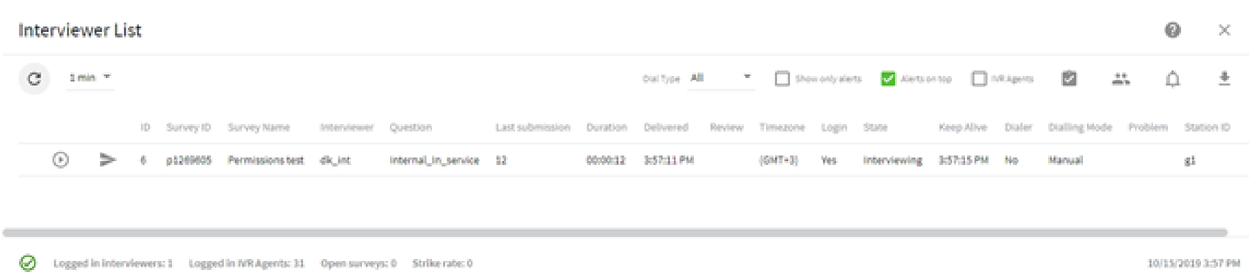


Figure 299 Activity Views - Interviewer List dialog

The Interviewer List dialog provides the following information:

- **ID** - interviewer's ID.
- **Survey ID** - ID of the survey to which the current interview pertains.
- **Survey Name** - name of the survey to which the current interview pertains.
- **Interviewer** - interviewer login name.
- **Question** - name of the currently active question.
- **Last submission** - time spent to submit the last answer (in seconds).
- **Duration** - duration of the current interview, or of the break period (in HH-MM-SS format).
- **Delivered** - timestamp indicating when the current interview was delivered to the interviewer, or when the break has started (format determined by the system locale).

- **Review** - the amount of time an interviewer has spent on open end reviewing in the current call (if a survey has the open end feature enabled).
- **Timezone** - interviewer time zone.
- **Login** - current interviewer's status ("Yes" indicates the interviewer is logged in and working, "On break" indicates the interviewer is logged in, but has left the desk and will be back shortly).
- **State** - the state which CATI Interviewer Console currently is in (the interviewer may be selecting a survey/respondent, conducting an interview, waiting for a call to be assigned, etc).
- **Keep Alive** - timestamp of the last successful server-to-interviewer-station query, indicates that the current interviewer session is considered as still continuing (when time interval between the last successful keep-alive query and the last unsuccessful query exceeds the limit, the interviewer is automatically logged out).
- **Dialer** - indicates whether the dialer is used by this interviewer, and displays the dialer name when the dialer is used.
- **Dialing mode** - the dialing mode which the interviewer currently works in (go to Dialing Mode on page 355 for more information)
- **Problem** - displays a corresponding error message in case a telephony problem occurs.
- **Station ID** - station ID entered by the interviewer at log-in time.

The Interviewer Activity view is simplified for users working without an integrated dialer. In this case columns that are only relevant when a dialer is being used are removed.

If the interviewer is currently on a break, all fields in the grid related to a project and an interview go blank, the Login field shows an "On break" message, the Delivered field shows the time when the break started, and the Duration counter shows the duration of the break period.

The first three grid columns are occupied by:

- Alert indicators (blank in case no alerts were triggered, otherwise can show the Red or Amber alert icon (go to Setting Up Interviewer Alerts on page 309 for more information)
- The Monitoring Console **Start/Stop** button (changes depending on situation) (go to Monitoring Interviewers' Work in Real Time on page 313 for more information)
- The Send Message button .

The last column is occupied by the Terminate button (the pop-up displayed when the mouse is over the button explains how it works - "Force the interviewer to be logged out") (go to Terminating an Interview and Forcing the Interviewer to be Logged Out on page 323 for more information).

Alert indicators are used to indicate alerts pertaining to different interviewing parameters (go to Setting Up Interviewer Alerts on page 309 for more information).

The Monitoring Console **Start/Stop** button toggles the interviewer work monitoring (go to Monitoring Interviewers' Work in Real Time on page 313 for more information). If monitoring is not permitted - the button is replaced by the Monitoring not Permitted icon

The **Terminate** button allows you to terminate the interview currently being conducted by the selected interviewer (go to Monitoring Interviewers' Work in Real Time on page 313 for more information).

The **Send Message** button allows creating and sending messages to interviewers (go to Sending One-way Notification Messages to Interviewers on page 317 for more information).

The Interviewer List dialog also contains a toolbar with the following buttons.

Button	Function	Description

	SELECT SURVEYS	Displays the Select Surveys dialog. Allows selecting surveys for which the list of interviewers is displayed in the grid. Changes color to orange when some surveys are selected.
	INTERVIEWERS	Displays the Select Interviewers dialog. Allows selecting interviewers to be shown in the view. Changes color to orange when some interviewers are selected.
	SET INTERVIEWER ALERTS	Displays the interviewer alert form. Allows configuring alert threshold for a number of parameters.
	REFRESH	Allows updating the Interviewer Activity View manually.
Drop-down list	REFRESH RATE	Allows specifying how often the survey list should be updated to reflect the most recent parameter values
Drop-down list	DIAL TYPE	Allows filtering interviewers included in the view by the dial type. Available only when the "TCPA compliance mode" is enabled for the company. Refer to (go to Dialing in the Single Survey TCPA Mode on page 357 for more information) for more information on the Dial Type.
Check box	ALERTS ON TOP	When enabled sorts interviewers by triggered alerts (in the order of alert importance - red alerts appear on top).
Check box	SHOW ONLY ALERTS	When enabled displays only rows containing alert information while hiding all other rows.
Check box	IVR AGENTS	When enabled, reveals the IVR agent list while hiding the "live" agents
	EXPORT	Allows exporting currently displayed list of interviewer activities.
	CLOSE WINDOW	Closes the Interviewer Activity View window.

7.2.1. Selecting Surveys to Display in the Interviewer List Window

You can select the surveys for which the list of assigned interviewers is to be displayed. To do this, either use the Survey Search form where you can search for surveys by name, or apply a filter to the survey list.

Note that when no surveys are specifically selected, all surveys will be used.

To select surveys to display in the interviewer list:

1. Click the **Surveys** button on the toolbar.

   The Select Surveys dialog opens.

2. Select the survey or surveys you wish to view the interviewers for (go to Selecting Surveys for the Survey List Activity View on page 297 for more information).

3. On completion click **Save selected**.

   The interviewer list is refreshed, leaving only interviewers assigned to the selected surveys.

7.2.2. Selecting Interviewers to be Included in the View

You can choose the interviewers or groups that are to be included in the Interviewer Activity View. To do this use the Survey Search form. Here you can also search for interviewers/groups by name.

Note that when no specific interviewers are selected, all interviewers working for the current company will be included into the View.

To select the interviewers to be displayed in the interviewer list:

1. Click the **Interviewers** button on the toolbar.

   The Select Interviewers/Groups page opens (go to Selecting interviewers or interviewer groups on page 395 for more information).

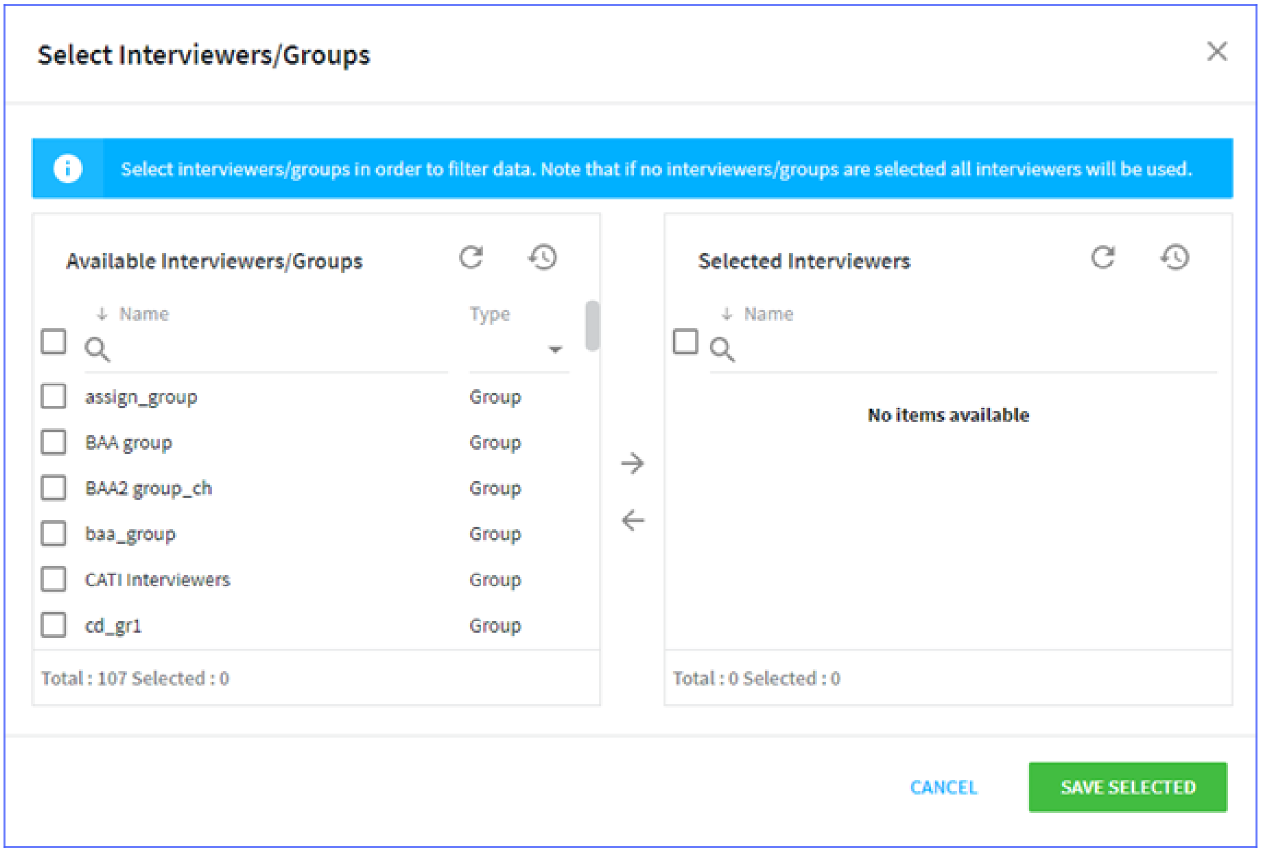


Figure 300 Selecting interviewers to display in the Interviewer List activity View

2. Select the required interviewers/groups and move them to the "Selected..." column.
3. On completion click **Save selected**.

7.2.3. Monitoring Interviewer Performance

In the Interviewer Console you can view the list of interviewers who have conducted at least one interview during the current day. The Interviewer performance activity view is presented in a separate window. The list shows all interviews performed by each interviewer who has logged into the Interviewer Console.

Statistics for each interviewer are shown in a separate row. Each row contains the following data:

- **Interviewer -** the interviewer's name.
- **Interviewing time -** cumulative total, shows the total time spent performing all interviews during all sessions that were conducted by the interviewer during the current calendar day, as defined by the applied local time setting under Resources/Active Timezones. This time does not include any time spent on breaks (go to Interviewer on a Break on page 272 for more information).
- **Interviews -** the total number of interviews performed by the interviewer during the current calendar day.
- **Completes -** the total number of interviews completed by the interviewer during the current calendar day.

- **Strike rate (last hour) -** the number of interviews completed by the interviewer during the past hour (see the counter refresh time and the "past hour" below).
- **Strike rate (average) -** the average number of completed interviews per hour for the time spent working on the survey today.

The Interviewer Performance list is refreshed every 3 minutes. This time is predefined and cannot be changed. The Strike Rate counter, which counts the number of completed interviews for the "past hour", is reset when this refresh period elapses. I.e. it always shows only interviews that were finished in the past hour, counted from the moment of the last refresh.

All other counters are also refreshed at 3 minute intervals. When the current calendar day elapses these counters are reset to zero.

To view the Interviewer Performance list:

1. Open the Activity views object list (go to Monitoring in the CATI Supervisor on page 295 for more information), and choose **Performance** from that list - double-click the required object name in this list in the left Navigation frame (or in the top right frame), or right-click its name and choose **List** from the shortcut menu.

   The interviewer Performance List opens.

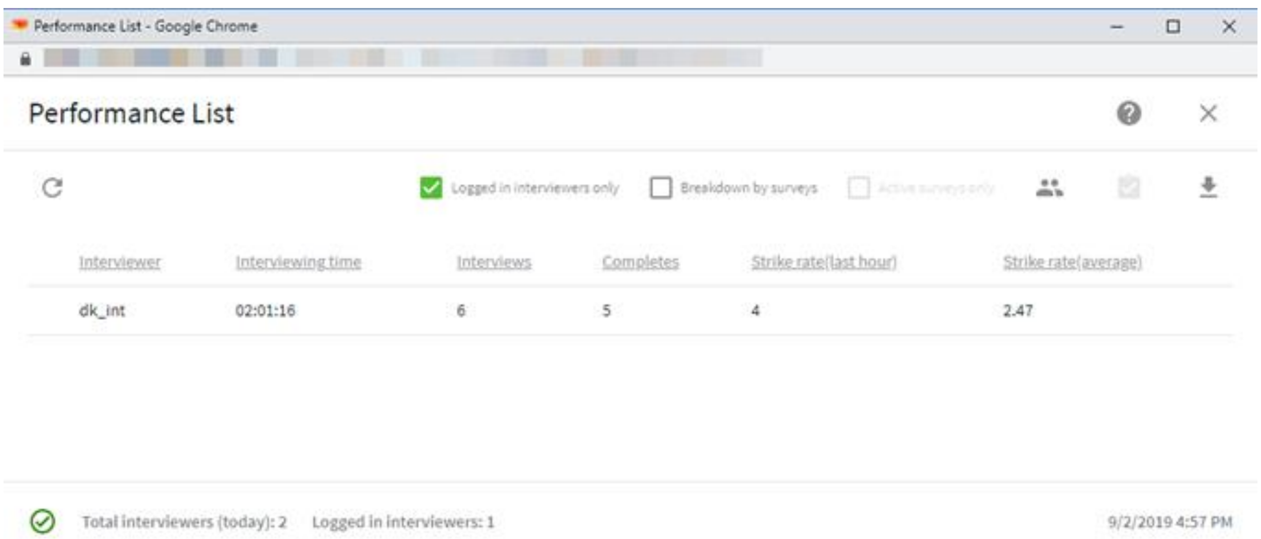


Figure 301 Example of the Interviewer Performance list

   By default the Performance view lists all interviewers who are currently logged into the Interviewer Console and are working on a survey. Uncheck the **Active surveys only** box to show productivity information for all surveys that have been worked on today.

2. To display a list of all interviewers who have worked in the Interviewer Console today and have conducted at least one interview, clear the **Logged in interviewers only** box and the **Breakdown by surveys** box.

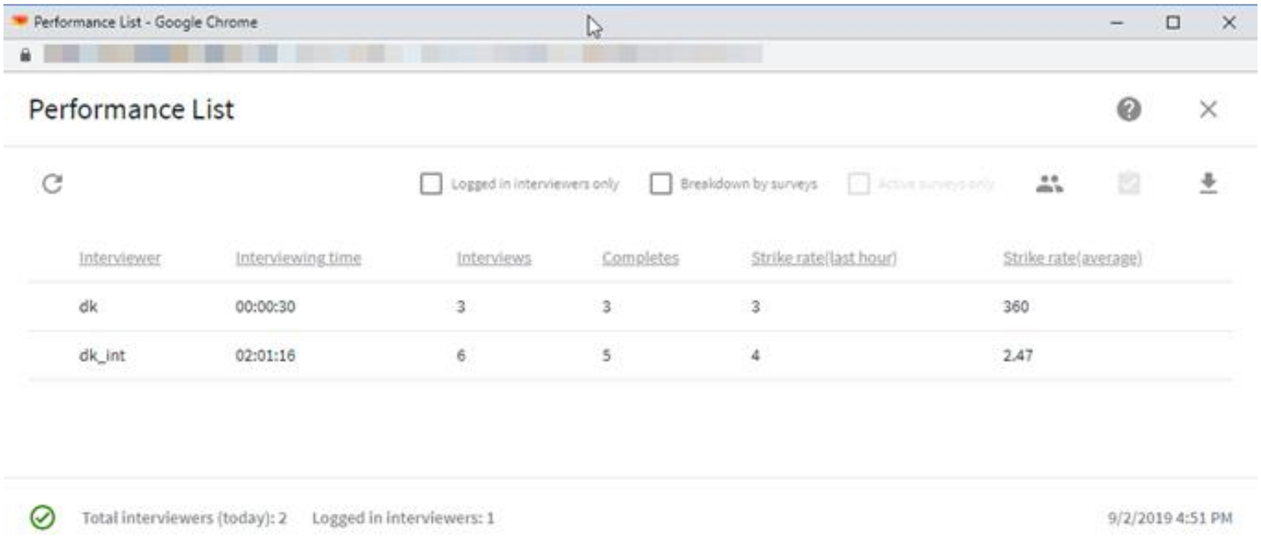


Figure 302 Example of the Performance list for all interviewers who have worked today

3. To select interviewers to be included in this list, click the **Interviewers** button.

   The Select Interviewers window opens (go to Selecting interviewers or interviewer groups on page 395 for more information)Use the same procedure as when making selections in the Select Surveys dialog (go to Selecting Surveys for the Survey List Activity View on page 297 for more information) and on completion click the **Save selected** button to save the settings.

4. To view the list of interviewers broken down by the surveys they worked with during the day, check the **Breakdown by surveys** box.

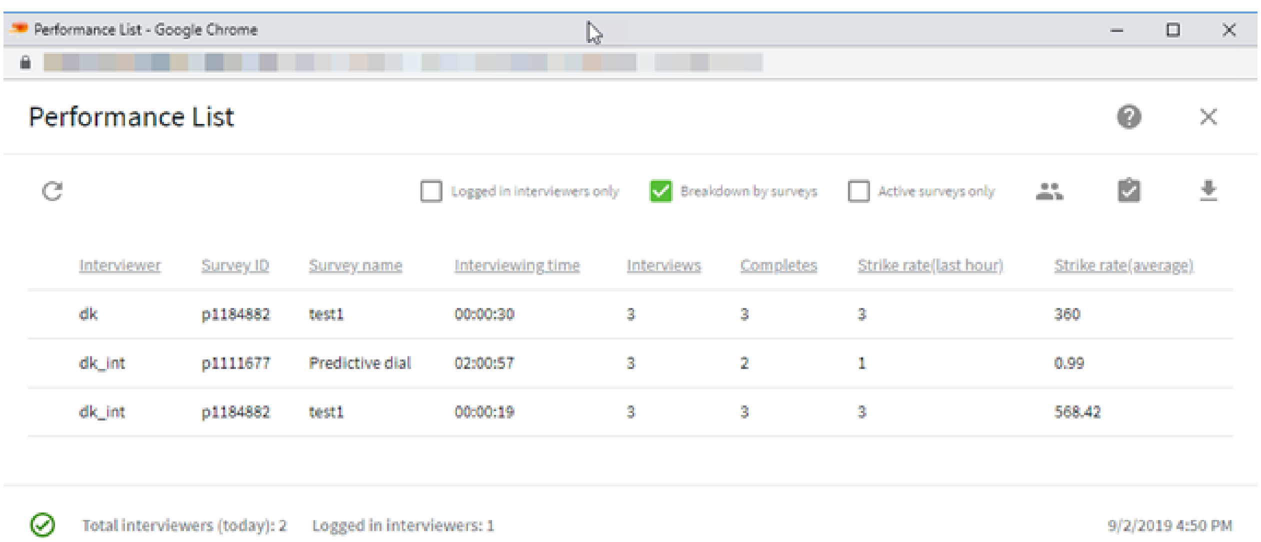


Figure 303 Example of the performance list broken down by surveys

When the Performance List shows information regarding interviewers broken down by surveys, the **Surveys** button becomes available so you can further filter this view by surveys which are currently in the Opened state.

5. To filter the view by opened surveys click the **Surveys** button. The Select Surveys dialog opens (go to Selecting Surveys for the Survey List Activity View on page for more information). This dialog has an additional **Add open surveys** button; click this to add all opened surveys in one operation.

6. You can also filter by the currently active surveys. This view shows only the surveys that interviewers are currently working with.

   To display this view, first check the Breakdown by surveys box, and then check the Active surveys only box (this box only becomes active when the Breakdown by surveys option is enabled).

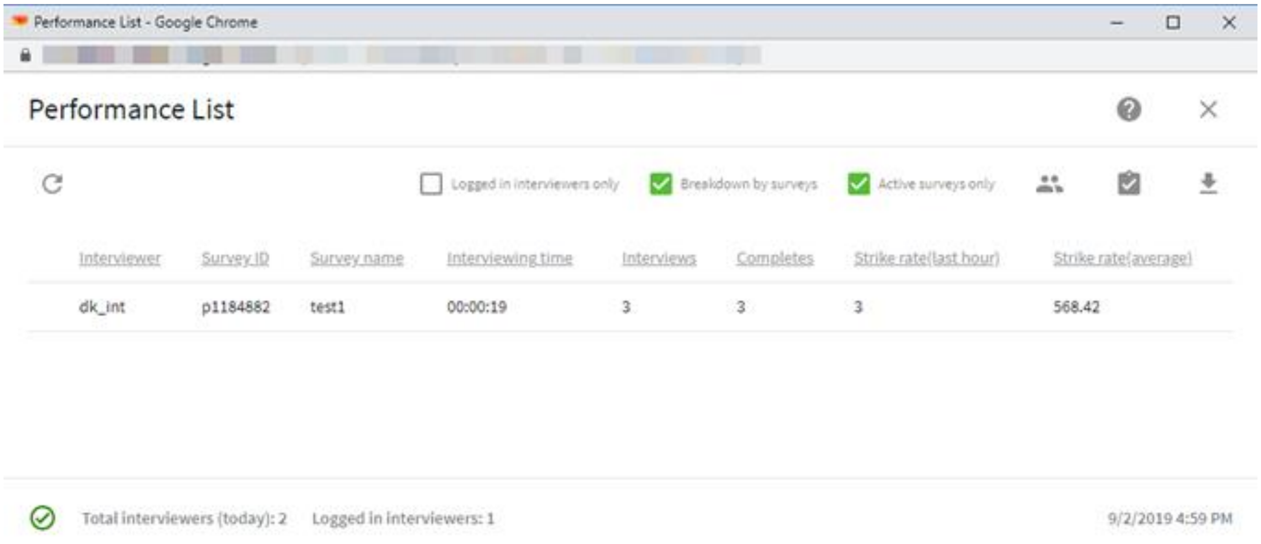


Figure 304 Example of the list broken down by active surveys

7. To refresh the view manually, click the **Refresh** button .

   You can export the Performance list in MS Excel format. The exported list retains the structure of the Interviewer Performance window and states the date the list was exported. The exported list includes only interviewers who were included in the list when the export command was executed - i.e. if the Logged in interviewers only option was turned on, only interviewers who are currently logged in will be included.

   Click the **Export** button above the grid and choose the path to save the file, or open the exported Performance List in the MS Excel application.

   The name of the file containing the exported Performance list includes the name of the activity view and the timestamp.

The status bar across the bottom of the window displays the following information:

- **Total interviewers (today) -** the total number of interviewers registered in the system as of today.
- **Logged in interviewers -** the number of interviewers currently logged into the Interviewer Console.
- **Current date and time -** the date and time are for the local timezone (go to Setting the Selected Active Timezone as Local on page 389 for more information).

7.2.4. Setting Up Interviewer Alerts

You can set up alerts that give a visual indication if an interviewer parameter reaches or exceeds a critical value. You specify the parameter thresholds using the Alert form.

- When the parameter value does not approach or exceed its specified threshold, the alert indicator cell for that interviewer is blank.

- When the parameter value reaches the specified warning threshold, the yellow indicator icon appears.
- When the parameter value reaches the specified red threshold, the icon changes to the red icon .

Check the **Alerts on top** box to sort the listed interviewers according to the alert indicator state. Interviewers marked with the red indicator are presented at the top of the list, followed by those with the yellow indicator, while the remainder are listed below.

You can hide interviewers with parameters that have not reached the warning threshold and display only those who have reached the warning and critical thresholds for a value. To do this check the **Show only alerts** box.

To specify alert parameters:

1. Click the **Alerts** button on the toolbar.

   The Alert form opens. The picture below shows the Alert form with previously configured alert values.

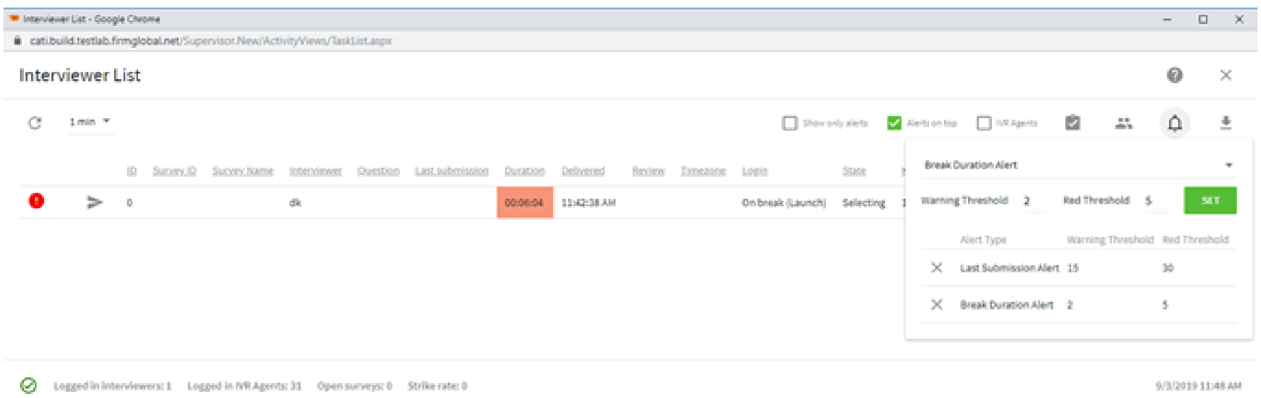


Figure 305 Setting up interviewer alerts. A red alert is displayed.

2. Choose the interviewer parameter that is to be monitored from the drop-down list of parameters displayed in the grid columns.
3. Enter the Warning and the Red threshold values.
4. Click **Set** to activate the specified threshold.
5. Repeat the procedure to specify threshold values for other parameters. Each configured alert is added as one row to the grid.
6. To delete an alert from the Alert form, click the **X** icon for that row.

7.2.5. Exporting the Interviewer Monitoring List

You can export the list of currently active interviewers as an MS Excel sheet.

1. Display the Interviewer List window (go to Monitoring Interviewers and their Work on page 303 for more information).
2. Set the required survey filter (go to Selecting Surveys to Display in the Interviewer List Window on page 305 for more information).
3. When the Interviewer List window shows the information for the required interviewers, click the **Export** button on the window toolbar.

   A standard browser dialog opens prompting you to choose what to do with the exported list.

4. Click the **Save** button.

A standard Windows Save As dialog opens.

5. Enter the file name and path to where the file is to be saved, and click the **Save** button.

   The list of monitored interviewers is saved in MS Excel format.

   If you click the **Open** button, the list of monitored interviewers is opened in the application which is used by your system by default to view files in MS Excel format.

7.2.6. Downloading the CATI Monitoring Console Installation Files

The download and installation procedures described here are performed on the same machine – you must always install the CATI Monitoring Console on the same machine to which you have downloaded the installation files.

Important!
This is intended for users who work behind proxy. ClickOnce is the mechanism used for the CATI console installation. ClickOnce provides support for Windows Integrated proxy authentication. ClickOnce does not provide support for other authentication protocols such as Basic or Digest. Users who run the installation behind a proxy server where that proxy server uses Basic authentication will be presented with an error message stating that the URL cannot be reached as proxy authentication is required. Console installation and console running will therefore not work through a Basic authentication proxy server. For Basic authentication, the only solution is that the user allows for proxy by-passing, otherwise every time the URL is accessed the user will need to authenticate. Methods such as attempting to load another browser and authenticating there first, then loading the console, will not work. For further information regarding ClickOnce deployment, go to the MSDN website at http://msdn.microsoft.com/en-us/library/ms228998.aspx.

To download the CATI Monitoring Console Installation Files:

1. In the Navigation menu go to the **Resources** section and choose the **Download CATI Monitoring Console** command in the drop-down menu.

   The Download CATI Monitoring Console dialog opens.

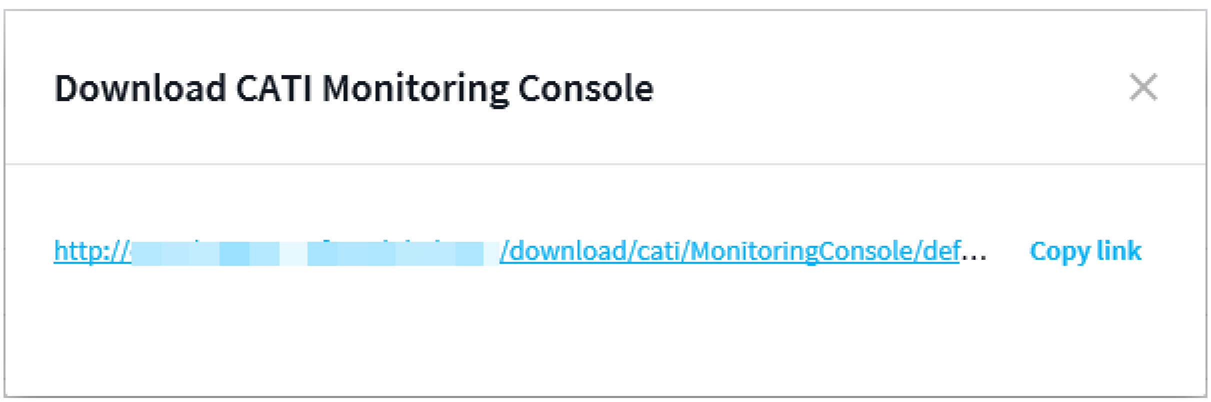


Figure 306 Fetching the CATI Monitoring Console download URL

2. Either choose the URL suggested in the dialog, or copy this URL into your clipboard by choosing the "Copy link" command and then paste it into the browser address bar.

   The download page opens in the browser.

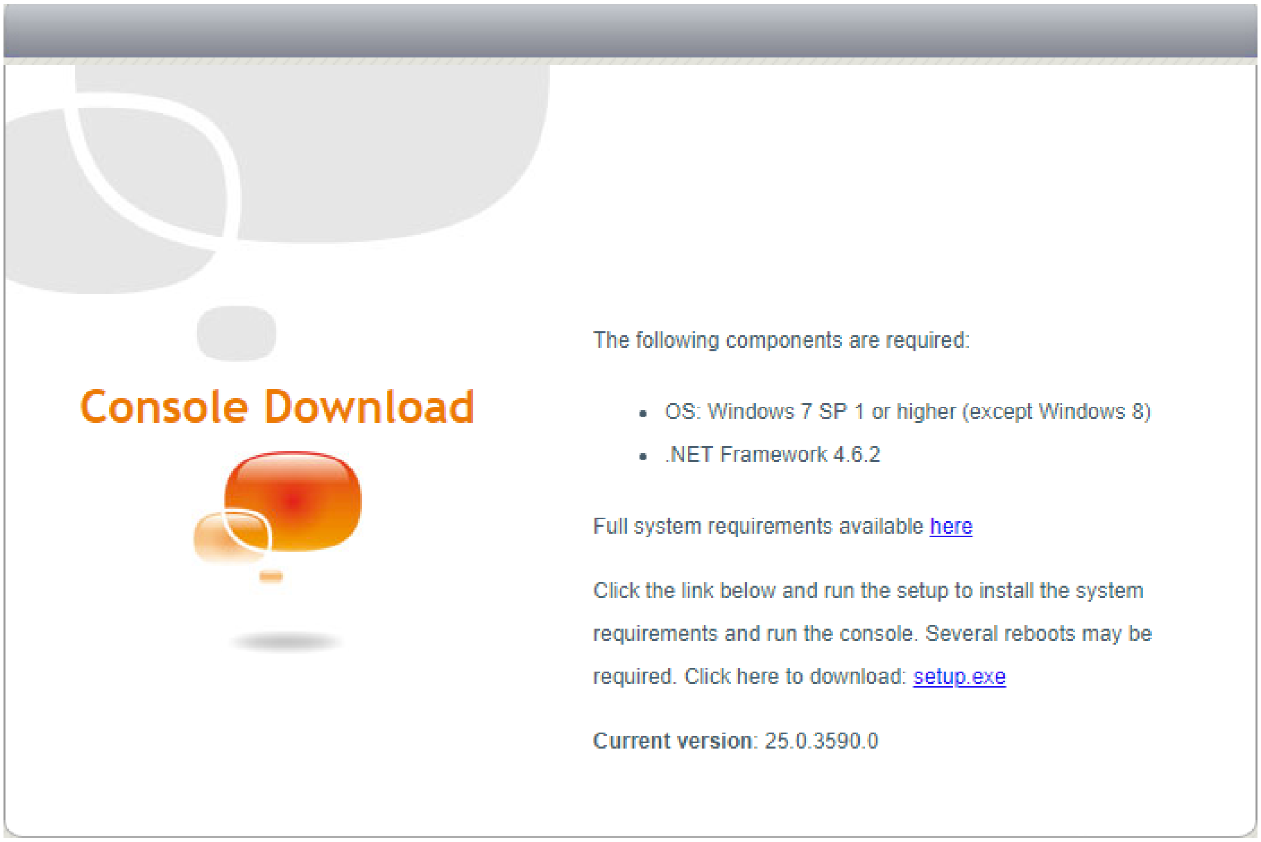


Figure 307 The CATI Monitoring Console download page

4. Click the download link and follow the instructions to download the file.

   If prerequisites (other than OS) that are mentioned in the dialog are not installed on your machine, they will be downloaded and installed automatically prior to the Console installation. The CATI Console installation procedure will commence once all the prerequisites are successfully installed (go to Installing a New Copy of CATI Monitoring Console on page 312 for more information).

   For instructions regarding CATI Monitoring Console installation refer to Installing a New Copy of CATI Monitoring Console.

   The CATI Monitoring Console upgrade procedure is described separately (go to Upgrading CATI Monitoring Console on page 313 for more information).

7.2.6.1. Installing a New Copy of CATI Monitoring Console

1. Log on to the console PC as the PC Administrator and start the installation file download procedure (go to Downloading the CATI Monitoring Console Installation Files on page 311 for more information).

   A progress bar is displayed. The CATI Monitoring Console is installed into the default destination; you cannot change the installation path.

   The CATI Monitoring Console installation procedure does not create an icon either in the Windows Programs menu or on the Desktop, in the System Tray etc. The CATI Monitoring Console utility is run automatically when required. The dialog displayed on a successful Console installation explains how to run the Console:

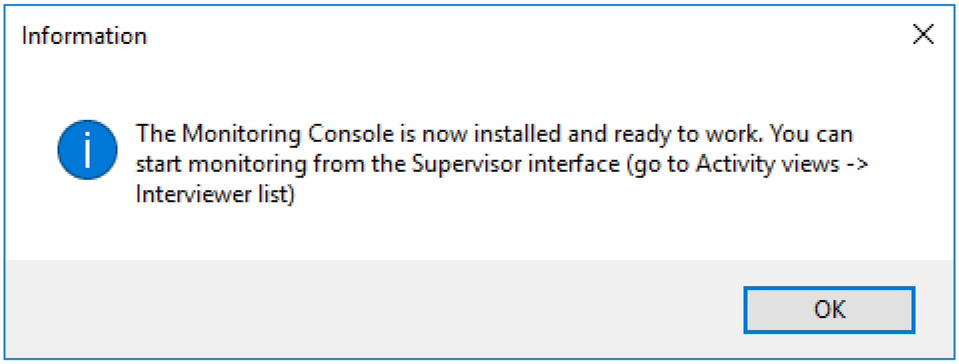


Figure 308 The "successful installation" dialog

To check if the CATI Monitoring Console is installed, go to the **Windows Control Panel > Programs and Features** group and open the **Uninstall or Change Program** list.

7.2.6.2. Upgrading CATI Monitoring Console

CATI Console is upgraded automatically after the application has been upgraded on the server. The files are copied into your PC and the console is enabled for CATI operations.

7.2.6.3. Uninstalling CATI Monitoring Console

If you need to completely remove the CATI Monitoring Console application from a PC, perhaps prior to performing a fresh installation, proceed as follows:

1. Go to the Windows Control Panel menu and open the Programs and Features application.
2. Browse the list of programs, locate the **CATI Monitoring Console** application and choose to uninstall it.

   Follow the instructions provided and complete the procedure.

7.2.7. Monitoring Interviewers' Work in Real Time

The CATI Supervisor module allows live monitoring of the interviewing process.

To monitor the interviewer's work in real time you must install and launch the CATI Monitoring Console application (go to Downloading the CATI Monitoring Console Installation Files on page 311 for more information).

Note: Check the following setting in the MSIE options - it is required for the CATI Monitoring Console to work properly. Run the MSIE browser and select Tools on the MSIE menu bar. Choose Internet Options from the Tools menu. This will display the Internet Options dialog box. Choose the Security tab. In this tab choose the Trusted Sites zone and click the Custom Level button in the bottom of this tab. This will display the Security Settings dialog box. Scroll down the list in this dialog box until you reach the Downloads group. Choose the Enable radio button for the "Automatic prompting for file downloads" option. Click OK in each dialog box to confirm changes and close these dialog boxes.

As a supervisor you can see which interview questions are completed and the answer options selected by the interviewer for those questions, the time spent, and other interviewing parameters. You can also listen to the conversation held between the interviewer and the respondent in the course of the monitored interview. You can also terminate an interview from the Interviewer activity List (go to Terminating an Interview and Forcing the Interviewer to be Logged Out on page 323 for more information).

Legislation in some countries prohibits live monitoring of respondent's answers until they provide their explicit consent. To comply with these rules the Forsta Plus software allows you to enable and disable the interview live monitoring and recording functions.

Enable/disable live and deferred monitoring:

The "Monitoring and recording options" section on the CATI Options tab provides controls which either allow live interview monitoring and/or screen recording from the start of the interview (this option is selected by default), or prohibit recording until a specific point in the interview is reached after which recording is allowed. The "recording allowed" point is specified by script functions which can be added to the survey by the survey designer; refer to the Forsta Authoring user guide and the Scripting manual for more information.

When live monitoring is allowed, you can see which interview is being conducted by the interviewer,

- Once live monitoring is allowed for an interview it cannot be prohibited - the interview is available for monitoring/recording until it finishes with a defined status.
- The monitoring console grid and the Interviewer List grid are refreshed every 15 seconds.
- The supervisor can set up alerts for any parameter that is displayed in the grid in the Interviewer List dialog.
- You can terminate the current interview if this is required.

You can also perform deferred monitoring of the interviewers' work. This means that you can enable the "Recording" option in Authoring and all interviews will be recorded and saved both as video and audio tracks from the point in the questionnaire logic where recording is allowed. Recorded interviews will then be available for reviewing on demand for a fixed period of time (go to Live Call Monitoring, Recordings and Playback in CATI Supervisor on page 324 for more information)

It is possible to perform live and deferred monitoring simultaneously. This means that any interview can be monitored in real time (live monitoring) with the deferred monitoring option enabled so that it can be saved for viewing at a later time.

To start and stop monitoring:

1. Go to the **Activity Views > Interviewer List** menu.

   The Interviewer List is displayed. The picture below shows one interviewer currently logged in and live monitoring can be started for this interviewer.

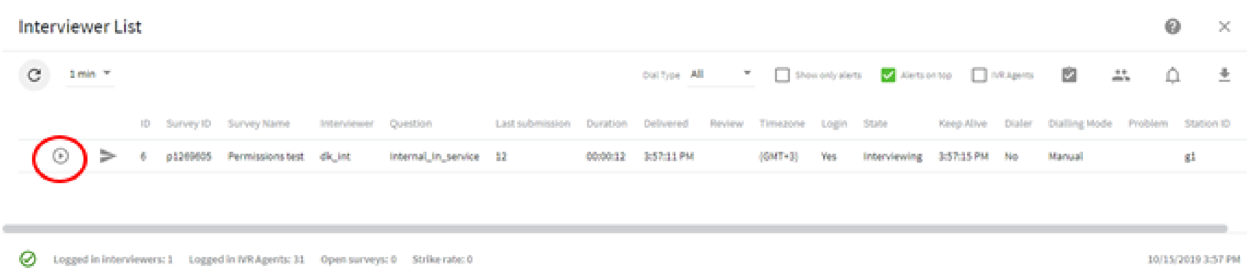


Figure 309 Example of the Interviewer List

2. Choose the interviewer you want to monitor and click the **Start monitoring console** button for this row (ringed above).

   A dialog opens asking you to confirm the action.

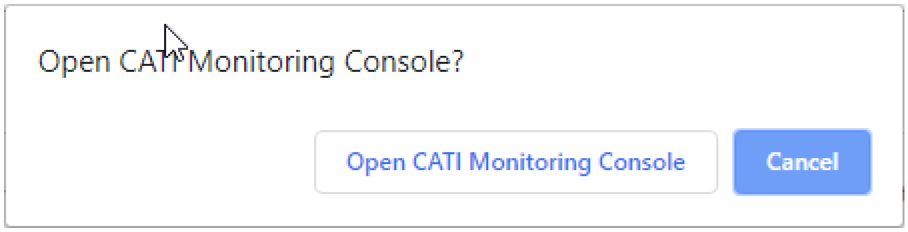


Figure 310 Confirm the action

3. Click the **Open CATI Monitoring Console** button.

   Monitoring is started, and the **Start monitoring console** button for the relevant interviewer changes to the **Stop monitoring** button ■.

   When live monitoring is prohibited for the interview a warning icon ⊘ is presented, and while this is active the supervisor cannot monitor the current interview. If a point in the interview logic is reached where live monitoring is allowed, the **Start...** button will become available.

   The picture below shows that the interviewer is already being monitored so the **Stop monitoring** button is visible (ringed below).

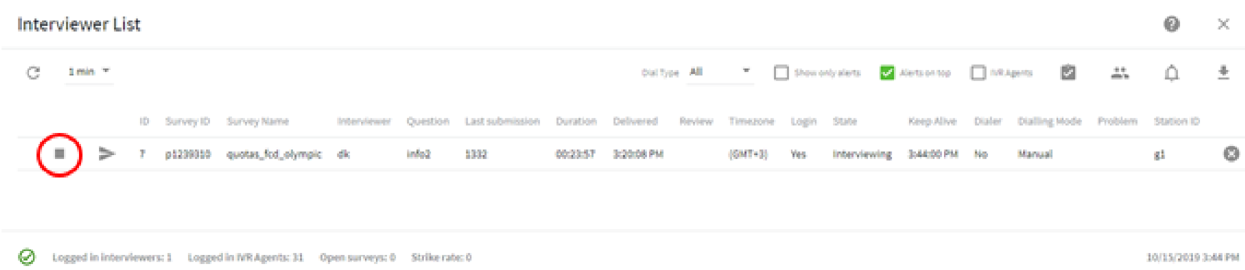


Figure 311 The interviewer is currently being monitored

4. When the **Start monitoring** button is clicked, the Monitoring dialog opens.

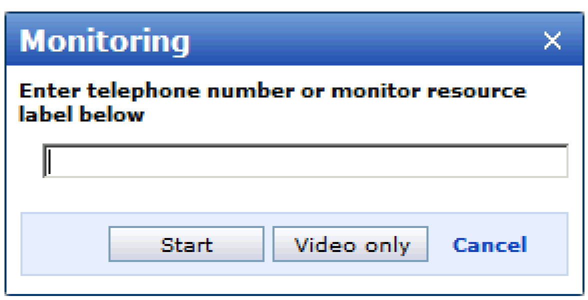


Figure 312 Choosing the monitoring option - with or without audio

Note that live monitoring also can include listening to the conversation held by the interviewer and the respondent in the course of the interview. This dialog appears only if the Dialer in the system is currently in the "available and operational" mode. You can listen to the interview audio only if the telephone number is provided in the dialog. The last number that was entered in this field and dialed by the dialer system is stored and will be shown the next time the Monitoring dialog is displayed. You can either resubmit this number to the dialer or edit the number before submitting.

- Click **Start** to commence live monitoring of the Interviewer's console screen and simultaneously listen to the interview audio.
- If you do not wish to listen to the conversation, leave the telephone number field blank and click **Video only**.
- Click **Cancel** to close the dialog and cancel live monitoring.

  Clicking **Start** or **Video only** opens the Monitoring Console. This window shows the contents of the CATI Interviewer Console application window.

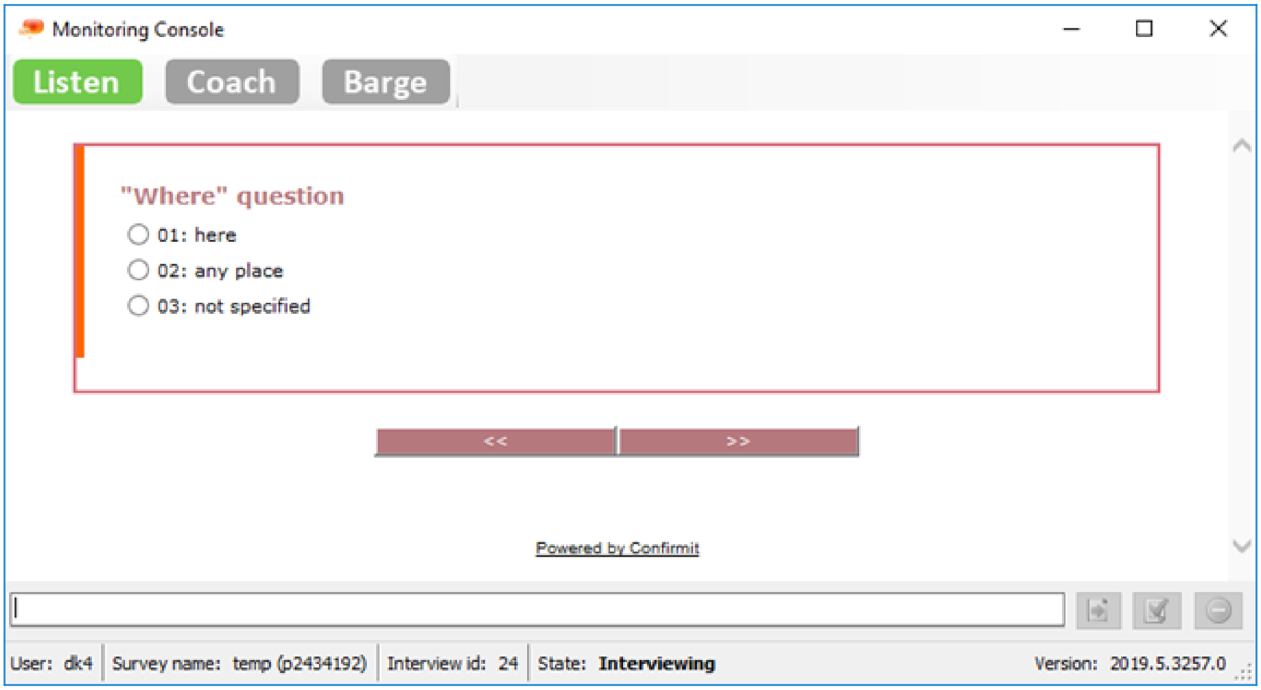


Figure 313 The Monitoring Console window displaying the monitored interview

The status bar displays general information about the monitored interview - the name of the interviewer who is currently being monitored, the survey name, the interview ID, the state the interviewer is in at the moment, and additional information related to interviewer's actions - whether the termination dialog is displayed, or if the interviewer is going to log out or go on a break when the current interview is finished.

The Monitoring Console toolbar provides controls that allow for the supervisor to interact either with the interviewer or with the interviewer and respondent simultaneously. This functionality depends on a dialer - if it supports a feature, the corresponding button becomes available on the Monitoring Console toolbar. This functionality can be enabled and disabled in the CATI Supervisor system settings (the Administration tab). When disabled, this control set is not displayed on the Monitoring Console toolbar.

Toolbar buttons switch on/off the following features:

- 

 - the Listening mode. Click this button to enable the standard listening-only mode. This mode is enabled by default.
- 

 - the Coaching mode button will unmute your microphone and allow the interviewer to hear what you say.
- 

 - the Barging mode button creates a three-way conversation involving the interviewer and the respondent.

Only one mode can be selected at a time. The button will be green when the mode is selected or grey when not selected. Clicking on a gray mode button will disable the current mode and activate the selected one (the selected mode button will then turn green to show that it is the active mode).

In a situation when the previous interview finishes and the supervisor keeps the Monitoring Console window open and live monitoring is not allowed for the next delivered interview, the monitoring console shows a blank screen and displays the notification message in the status bar for the supervisor.

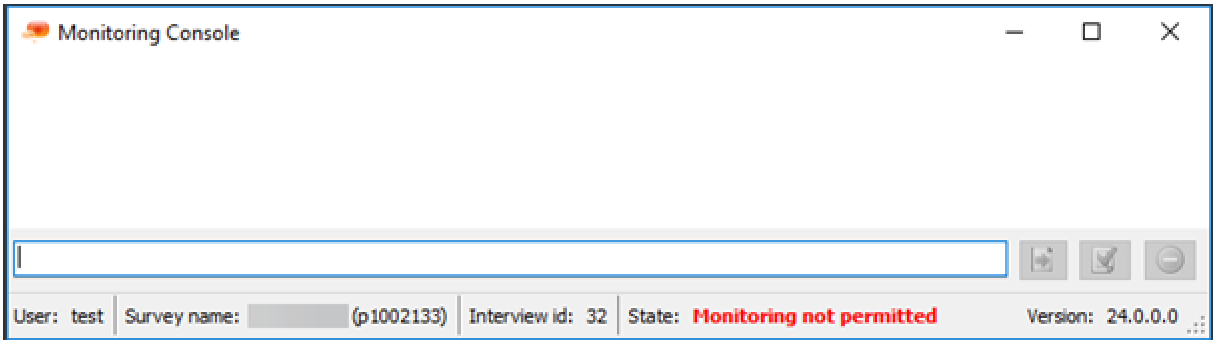


Figure 314 Monitoring console with blank screen and a warning message appears when live monitoring is prohibited

The monitoring console starts showing the interviewing process when the interview reaches the point where live monitoring is permitted (when a corresponding function is triggered in the questionnaire tree).

Important!
Be aware that if monitoring is triggered by a function in the survey, it will be possible for the interviewer to return to a previous question (one presented before the monitoring consent was allowed) and monitoring will remain active.

Note that for interviews or parts of interviews where live monitoring is not allowed, audio is also not available.

7.2.8. Sending One-way Notification Messages to Interviewers

You can communicate with interviewers in your company using instant messages. Messages are delivered to the interviewers via the CATI Interviewer Console, so interviewers must be logged in to read them. If an interviewer is not logged in when a message is sent, then if you have selected to send to all interviewers they will receive the message when they next log in.

You can send a message either to specific interviewers or to an interviewer group working with a specific survey. Messages can be sent in the following situations:

- From the Interviewers tab to the selected interviewers or the selected interviewer groups.
- From the Interviewer List window (Activity Views object) to the particular interviewer.
- From the Surveys tab to the interviewers assigned to the selected survey.
- From the Survey List window (Activity Views object) to the interviewers assigned to the selected survey.

Messages that are sent to particular interviewers from the Interviewers tab or from the Interviewers List activity view can be delivered even if the interviewer is not logged into the Interviewers Console, or if he/she is logged in but is not currently conducting an interview (they are in the Selecting, or On a Break states). When you send a message to particular interviewers from the Interviewers tab or from the Interviewer List activity view, you can choose whether the message is to be delivered to all interviewers including those who are not currently logged in, or only to those who are currently working with CATI Console.

Messages that are sent to interviewers assigned to a particular survey are delivered only when they are logged into the Interviewers Console and are currently conducting an interview (in the Interviewing state). There is no option in this case for sending a message to those interviewers who are currently offline.

Sent messages are valid (can be viewed) for the following time periods (go to Viewing Messages on page 250 for more information):

- Messages that were accessed and viewed by the interviewers are deleted when the recipient interviewer closes the current session (logs out of the CATI Interviewer Console).
- All unread messages are stored on the server, and can be accessed by the recipient, for one week from the creation date. After a week they are deleted from the system.

To send a message to the interviewer(s) from the Interviewers tab:

1. Select the desired Interviewers object in the list in the Navigation frame (go to Interviewer Management on page 12 for more information).

   If you choose to view interviewer groups, you will be able to send messages to the groups that are currently listed in the top right frame. If you choose to view interviewers, you will be able to send messages to interviewers who are currently listed in the top right frame.

2. Select the groups or interviewers you want to send a message to.
3. Right-click on any of the selected items, and choose **Send Message** from the context menu that appears.

   The Send Message dialog opens.

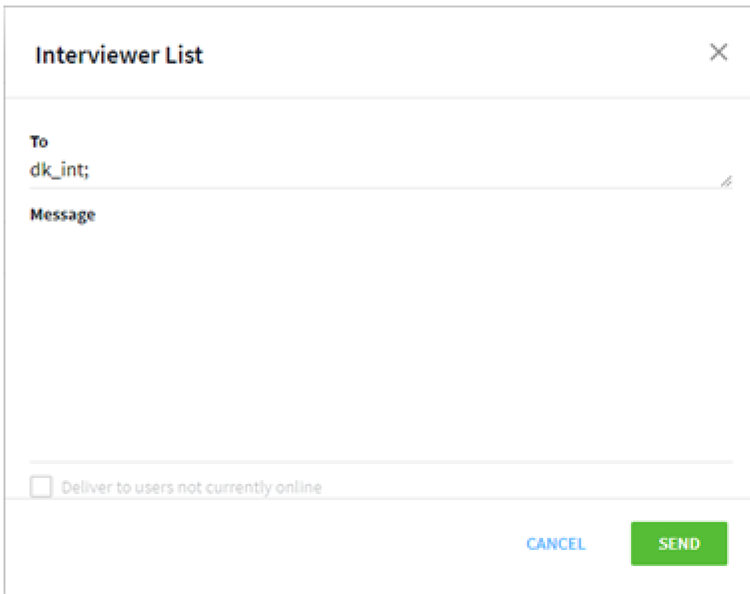


Figure 315 Sending message to interviewers

Selected recipient names are displayed in the To field, separated by semicolons. Note that this field is not editable. To add or remove items from this field, close the Send Message dialog and then repeat steps 1 through 3, this time selecting only items you need.

Check the **Deliver to users not currently online** checkbox to send your message to interviewers who are not currently logged in. They will be informed of the message when they next log in to work with the CATI Interviewer console.

4. Type your message into the Message field.
5. Click **Send** to send the message.

To send a message to the interviewer(s) from the Surveys tab:

1. Select the Surveys object in the list in the Navigation frame.
2. Select surveys in the top right frame.

   The message you create will be sent to the interviewers assigned to the selected surveys.

3. Right-click on any of the selected items and choose **Send Message** from the context menu that appears.

   The Send Message dialog opens.

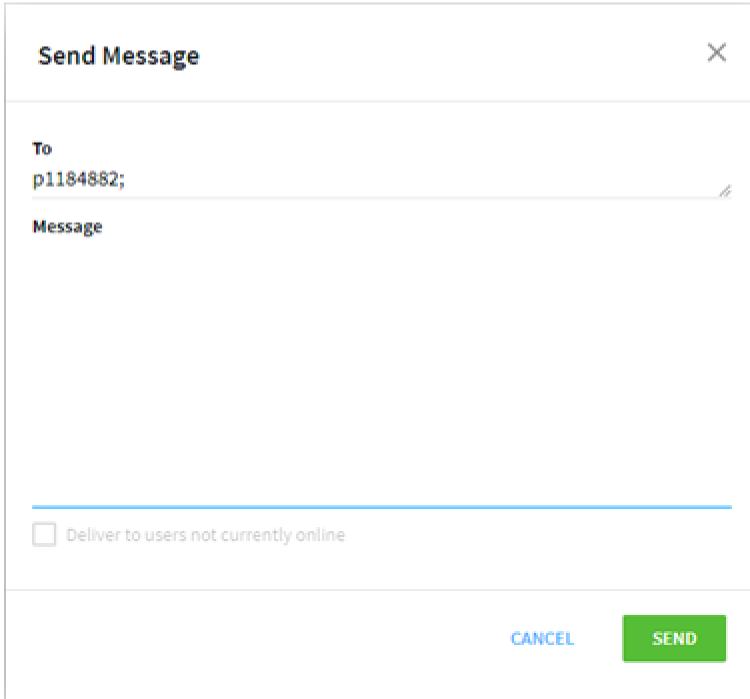


Figure 316 Sending message to interviewers assigned to the selected survey

Selected survey names will be displayed in the To field, separated by semicolons. The procedure used to send a message is similar to that described earlier in this topic.

To send a message from the Interviewer List dialog (Activity View):

1. Select the Activity Views object in the Navigation frame.
2. Select the Interviewer List view.

   The Interviewer List dialog opens(go to Monitoring Interviewers and their Work on page 303 for more information).

3. Click the **Send Message** icon in the row corresponding to the interviewer you want to send a message to.

   The Send Message dialog opens. The procedure used to send a message is similar to that described previously in this topic.

To send a message from the Survey List dialog (Activity View):

1. Select the Activity Views object in the Navigation frame.
2. Select the Survey List view.

   The Survey List dialog opens (go to Monitoring Surveys and Survey-Related Events on page 295 for more information).

3. Click on the **Send Message** icon in the row corresponding to the particular survey. The message will be sent to all interviewers assigned to this survey.

   The Send Message dialog opens. The procedure used to send a message is similar to that described earlier in this topic.

7.2.9. Chat: Two-way Conversations Between Supervisors and Interviewers

As a supervisor you can exchange chat messages with interviewers within CATI. You could of course use third-party messaging applications, but this would require the installation of those apps, separate login processes, and passwords to manage.

This functionality is additional to the one-way messaging capability (go to Sending One-way Notification Messages to Interviewers on page 317 for more information). Note that the one-way and two-way functionalities are started using different methods to avoid confusion. The two-way chat capability is only supported by the browser-based version on the interviewer UI; it is not supported in the desktop interviewer UI or the classic style supervisor UI.

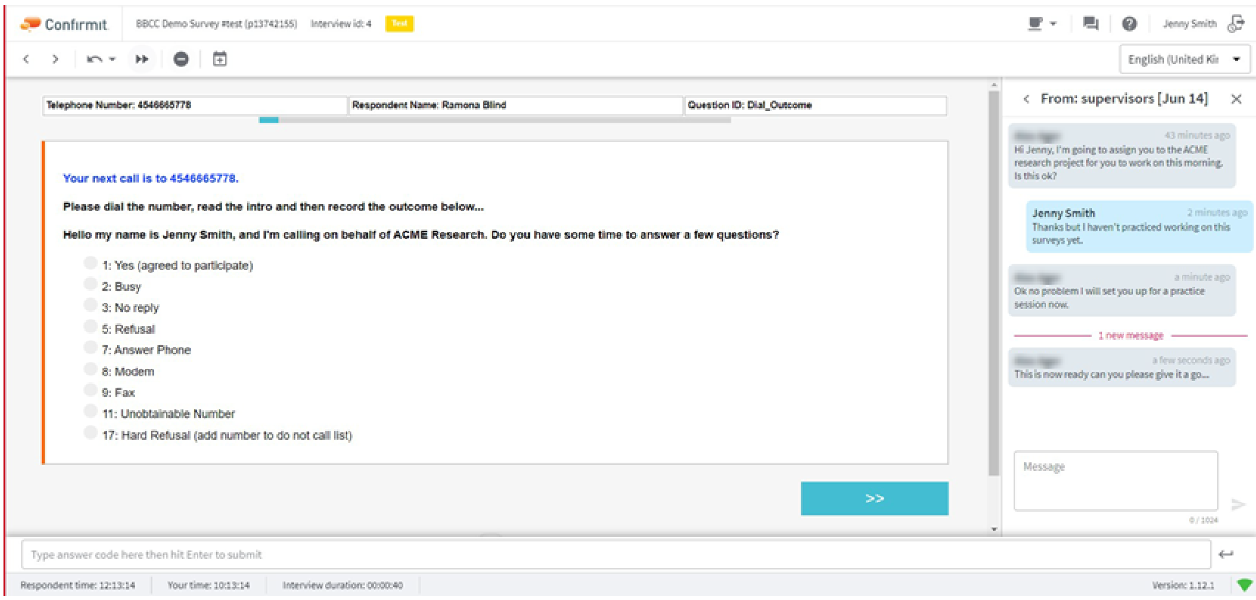


Figure 317 Example of the chat panel for an interviewer

When a supervisor starts a new chat they can search for and choose the interviewer they want to chat with. Only that interviewer will then receive the message and will be able to respond.

When an interviewer starts a new chat they cannot choose the supervisor the message will be sent to; the message will be delivered as a notification that is visible to all supervisors working in the supervisor UI. In the supervisor UI a new chat message will have a blue spot to indicate that it has not yet been replied to. Any supervisor who responds to the thread will automatically be subscribed to it and only the subscribed supervisor will be alerted by new messages from the interviewer on that same thread.

Notification badges with a count of unread messages are overlaid onto the **Chat** button to indicate when there are messages that ought to be read.

When a chat message is sent to an interviewer, if the interviewer does not have the chat column open then a temporary preview/notification appears in the lower-right corner of the screen. This closes automatically after a few seconds, but the interviewer can click into the chat panel to see the message in full.

Existing chat threads are retained for seven days from the time of the last message, after which they will be deleted automatically.

7.2.9.1. To Start a New Chat as a Supervisor

1. Once you have logged in to the supervisor UI, click on the **Open chat** button  on the toolbar.

   The two-way chat panel opens. Here you will see your existing chat threads and have the option to start a new chat. Note that this system provides simple messaging functionality; you cannot for example edit or delete messages once they have been sent, and you cannot include images, emojis etc.

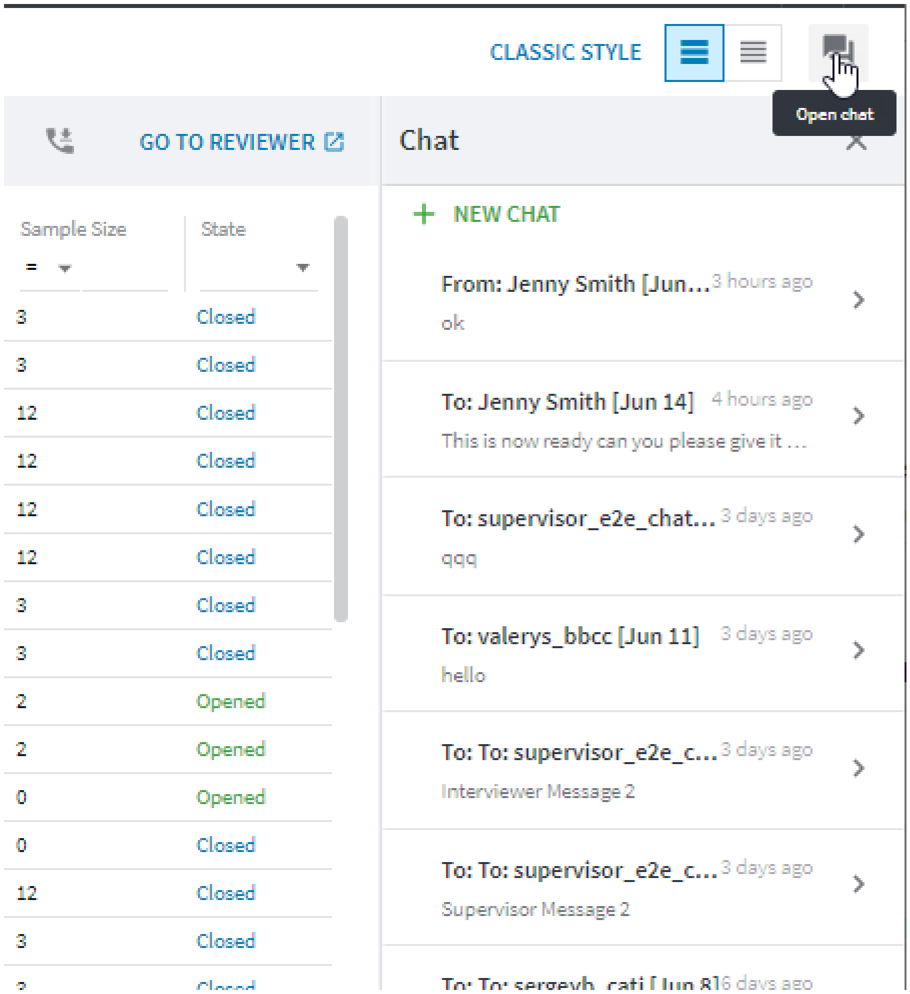


Figure 318 Example of the chat panel for a supervisor

2. Click the **+ New Chat** button.

   A blank chat column opens.

3. Start to type the name of the interviewer into the Search field.

   A list of the interviewers that correspond to the input text appears.

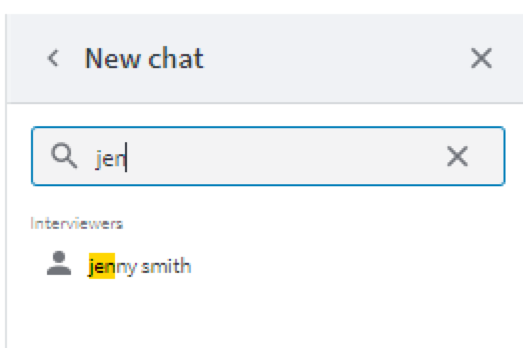


Figure 319 Searching for the interviewer

4. Select the appropriate interviewer.
5. Type your message into the text field towards the bottom of the chat column, and when you are ready press the **Return** key on your keyboard or click the **Send** button.

   The message is sent. A red notification badge will be displayed on the recipient interviewer's **Messaging** button to indicate an unread message is awaiting attention.

   Note that you can press **Shift+Return** to add a line break.

7.2.9.2. To Start a New Chat as an Interviewer

1. Once you have logged in to the interview console, click on the **Messaging** button  on the toolbar, or use the **Ctrl-O** shortcut.

   The two-way chat panel opens. Here you will see your existing chat threads and have the option to start a new chat. In the event you have unread messages, a red notification badge will be displayed on the button and the unread messages will be indicated with a blue dot.

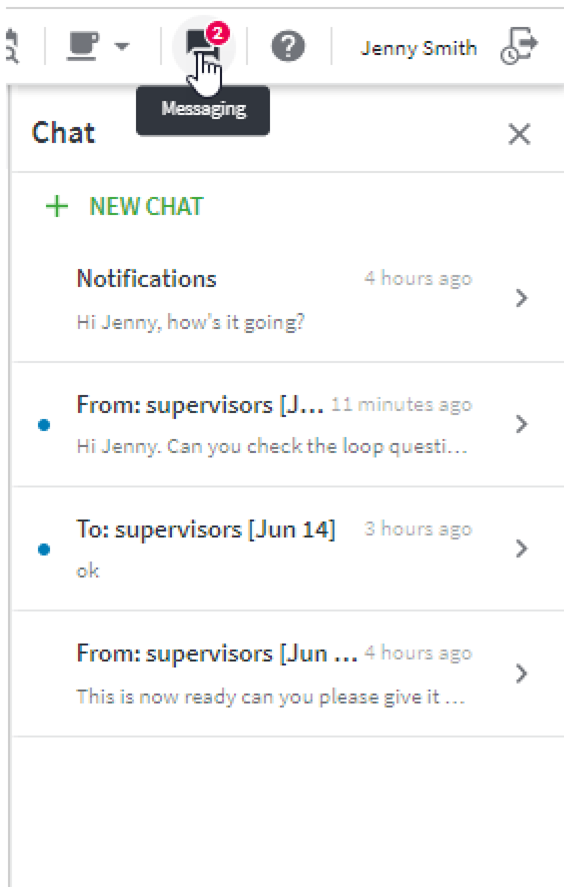


Figure 320 Example of an interviewer's chat column

2. Click the **+ New Chat** button.

   The chat column clears and a text field appears towards the bottom of the column, into which you type your message.

3. Type your message into the text field, and when you are ready press the **Return** key on your keyboard or click the **Send** button.

The message is sent to all supervisors. Any supervisor responding to the thread will automatically be subscribed to it and only they will be alerted by new messages from the interviewer on that same thread.

Use **Shift+Return** to add a line break.

Additional notes:

- Disabling chat features: To be able to use two-way messaging it is essential that the interviewer toolbar button to open the message pane is enabled. If this is disabled (under **Admin > Settings > Interviewer Console**) then the buttons to send or receive messages will not be visible in the supervisor/interviewer UI.
- A CATI system administrator can disable the 2-Way chat capability. To do this, the CATI administrator must go to **Admin > Settings > Interviewer Console** and uncheck the setting labelled 'Allow interviewers and supervisors to perform 2-way messaging'. When this setting is disabled but the separate setting to display the message button on the interviewer toolbar is enabled then one-way messages can still be sent/received.
- Chat title convention: Chat titles for the supervisor are displayed using the following logic: [To | From] : [Interviewer name] [[Date of chat creation in 'MMM D' format]]. This is the same for the interviewer UI, but instead of [Interviewer name] it's just "supervisors". Note that chat titles for the interviewer are localized and will change if the interviewer changes the default language in their browser settings.
- Call centers: If you are working in an environment that is divided into multiple call centers then messages will be contained within the same call center from which they are sent.

7.2.10. Terminating an Interview and Forcing the Interviewer to be Logged Out

You can cancel an interview that is currently in progress. If you do this the interview will be aborted and the interviewer will be logged out. Note that a short delay can be expected between when the command is selected and when the interview is closed; this may enough to allow the interviewer to proceed to another question.

CATI Supervisor will prompt you by displaying the following warning message.

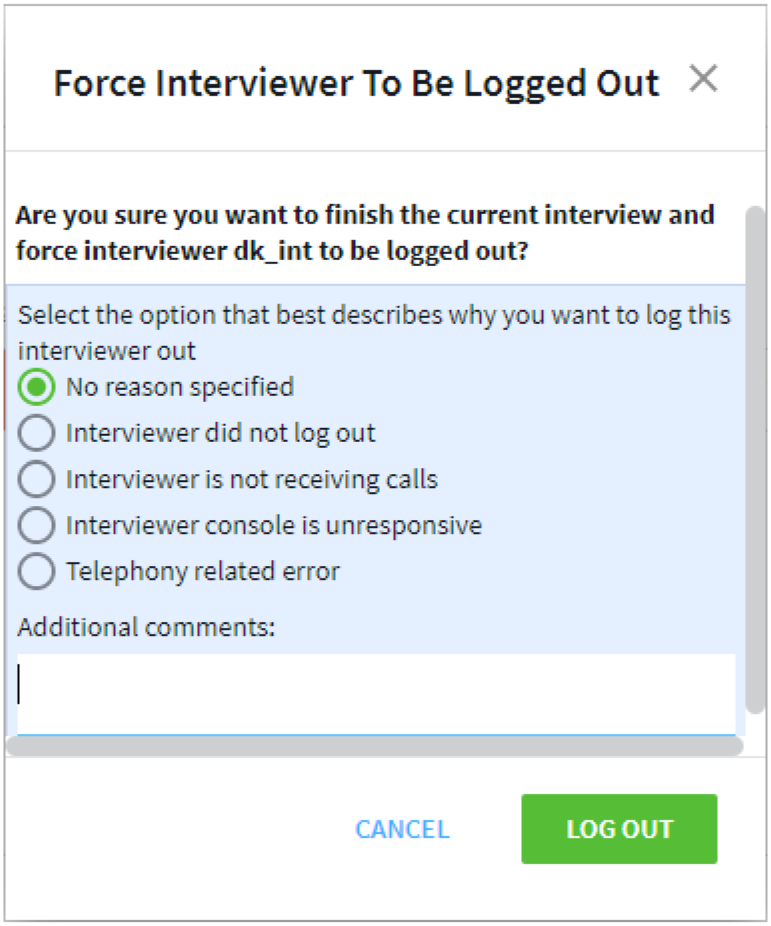


Figure 321 The confirmation dialog when terminating an interview

You can specify a reason for logging the interviewer out - choose a radio button from the list, and you can provide a comment by typing the text in the Additional comments field. When you are ready click **Log out** to complete the procedure, or click **Cancel** to close the dialog and cancel the action.

If you select a reason for logging the interviewer out, this reason will not be shown to the interviewer and it is not included in any report generated by the CATI Supervisor module; it is saved to the event log only. A system message is however displayed to the interviewer to inform them they have been logged out. An interview that is terminated by the supervisor is assigned the "Terminated by the system" extended status.

Note that if an interviewer has been logged out automatically for any reason, the interview will have to be terminated use this procedure.

Important!
The Supervisor must always terminate the current task for an interviewer who is logged out automatically for technical reasons, for example a dialer failure. Use the Interviewer List window to do this, and click the Terminate icon for the interviewer **(go to Monitoring Interviewers and their Work on page 303 for more information)****. The interviewer will not be able to log in again until the Terminate command is run.**

7.2.11. Live Call Monitoring, Recordings and Playback in CATI Supervisor

The supervisor can monitor and record all the on-screen actions performed by the interviewer during the course of an interview. In addition, if an integrated dialer is used, the conversation between the interviewer and the respondent can also be recorded. As the video and audio are recorded for later review, this function is called "Deferred monitoring". You have on-demand access to any completed and recorded interview.

Note: Audio recording is only possible on systems that have an integrated dialer.

Live and deferred monitoring can be conducted simultaneously, so an interview can be monitored in real time with deferred monitoring enabled so it is recorded for reviewing at a later date.

Go to the list of all interviews/calls in the Call Management window to play recorded audio tracks (go to Recording and Playing Back Conversations on page 176 for more information).

Note: The settings and options listed below are set for the survey by the survey designer. The location of the settings depend on the Forsta authoring application used to create the survey: for Professional Authoring go to the Survey Settings > CATI Options tab, for Survey Designer go to the Design > Settings page > CATI-Telephone section.

For the Live and Deferred Monitoring functionality the following options are available:

- To record audio, a dialer must be in use and the **Enable whole interview audio recording** option (see the Note above) must be enabled for the survey. Note that if the dialer is in the Manual mode this setting is not available so audio recording is not possible. When **Enable whole interview audio recording** is set, audio will automatically be recorded from the beginning of the interview. Recording will continue to the end of the call unless a **StopVoiceRecording()** survey script is executed.

Note: It is also possible to perform sectional recordings. Refer to the CATI Administrator manual for more information.

  - When the **Allow monitoring from the beginning of the interview** setting is enabled the system allows the supervisor to start monitoring on any live call and at any point during the course of the interview.
  - **Only allow after execution of enable function** only allows the supervisor to monitor calls where the monitoring function is enabled by the survey script function EnableLiveMonitoring(). Live call monitoring will then only be possible after the point in the survey where this function has been executed. The intention behind this option is that at the beginning of the interview the interviewer can ask the respondent for permission to monitor the interview, and monitoring can only start if the respondent agrees (go to Monitoring Interviewers' Work in Real Time on page 313 for more information).
- To record video there are two options:
  - When the **Automatically start at beginning of interview** option is selected, screen recording starts at the beginning of each interview and a video file is saved automatically. All actions carried out in the Interviewer Console during all interviews for this survey are recorded and are saved as separate videos for each interview. The video recordings are listed on the Recorded Interviews page.
  - When the **Only start after execution of enable function** option is selected, screen recording will only start for interviews where the survey script function StartScreenRecording() has been executed. Screen recording will commence automatically from the point at which the function is executed.

  The **Enable interview screen recording** and **Enable whole interview audio recording** options are set independently, so you can record video, or audio, or both (go to Recording and Playing Back Conversations on page 176 for more information).
- The Dialer must be in the **Connected and activated** state. If the Dialer is not in this state (go to Managing Dialers on page 350 for more information), audio will not be recorded. Note that the dialer must be running before you can play back audio tracks.
- The CATI Monitoring Console is required to perform all interview monitoring so must be installed on your computer (go to Downloading the CATI Monitoring Console Installation Files on page 311 for more information).

To check whether **Enable interview screen recording** and **Enable whole interview audio recording** are enabled, go to the **Survey Properties > General** tab (go to Viewing and Modifying a Survey's General Properties on page 68 for more information).

Video recordings on systems without an integrated dialer will provide for real-time silent playback of the interviewer screen capture. When playing back a video recording on a system with an integrated dialer (and audio recording is enabled) it will play back with both screen and audio in synchronization (see adjusting audio-video synchronization below). The video recordings are stored on the server for 90 days, before being deleted automatically, however audio recordings are captured and stored independently by the dialer and are retained indefinitely unless configured otherwise on the dialer. Audio recordings can therefore still be played back via the Call Management UI even after the corresponding video recordings have been deleted.

Note: The video is not stored as 'files' but rather the data about every on-screen action performed by the interviewer is stored into the database. This is then played back as a real time recording using timestamps for each interaction.

To play a recorded interview:

1. In the Navigation Menu choose **Recorded Interviews**.

   The Recorded Interviews page opens.

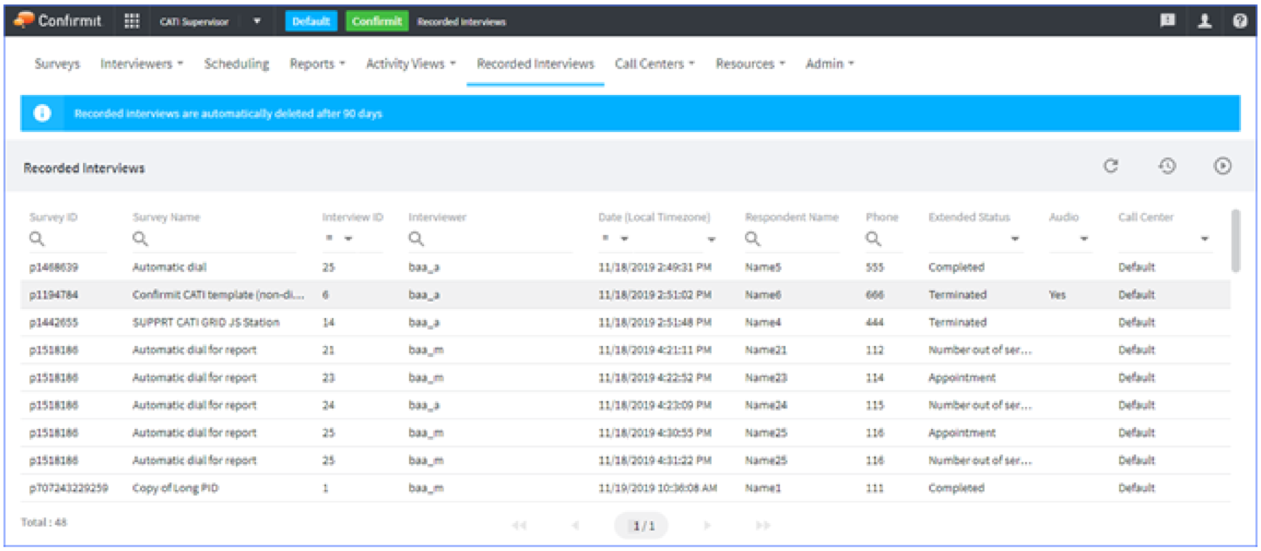


Figure 322 Viewing the list of recorded interviews

   This page lists all the interviews recorded by the interviewers who belong to the current company. The following information is presented:

   - **Survey ID**.
   - **Survey name**.
   - **Interview ID**.
   - **Interviewer name**.
   - **Date (Local Timezone)** - interview date (for the local time zone).
   - **Respondent name**.
   - **Phone -** the respondent's phone number.
   - **Extended Status -** the extended status of the interview at the moment the recording ended.
   - **Audio -** audio recording availability.
   - **Call Center -** The call center which the survey was assigned to at the time the interview was conducted.

   If a filter is applied using the searchable column header (go to Searching for Records in the List on page 7 for more information), you can remove this filter to view all the records by pressing the **Reset** button in the frame toolbar.

2. Select the required interview from the list, then either right-click the interview and choose **Play** from the context menu, or double-click it, or click the **Play** button in the toolbar above the list.

Note: The dialer must be connected (go to Managing Dialers on page 350 for more information) before you can play back or download a recorded interview. In the event of an issue, a warning message is presented.

The **Play** command initiates download of a file containing the recording of the selected interview. A standard file download dialog appears prompting you to choose whether you want the file to be opened from its location or to be saved elsewhere.

If you open the file, the monitoring console will be loaded and playback will commence. If you decide to save the file instead, a standard Save File dialog opens. The file will have the **.cspd** extension. Choose the path where the file is to be saved; you can later run the file from this location.

The CATI Monitoring Console also allows you to save the interview recording which is currently being played in the Monitoring Console. See below for details.

3. When the interview recording is opened, the CATI Supervisor Player starts.

The CATI Supervisor Player

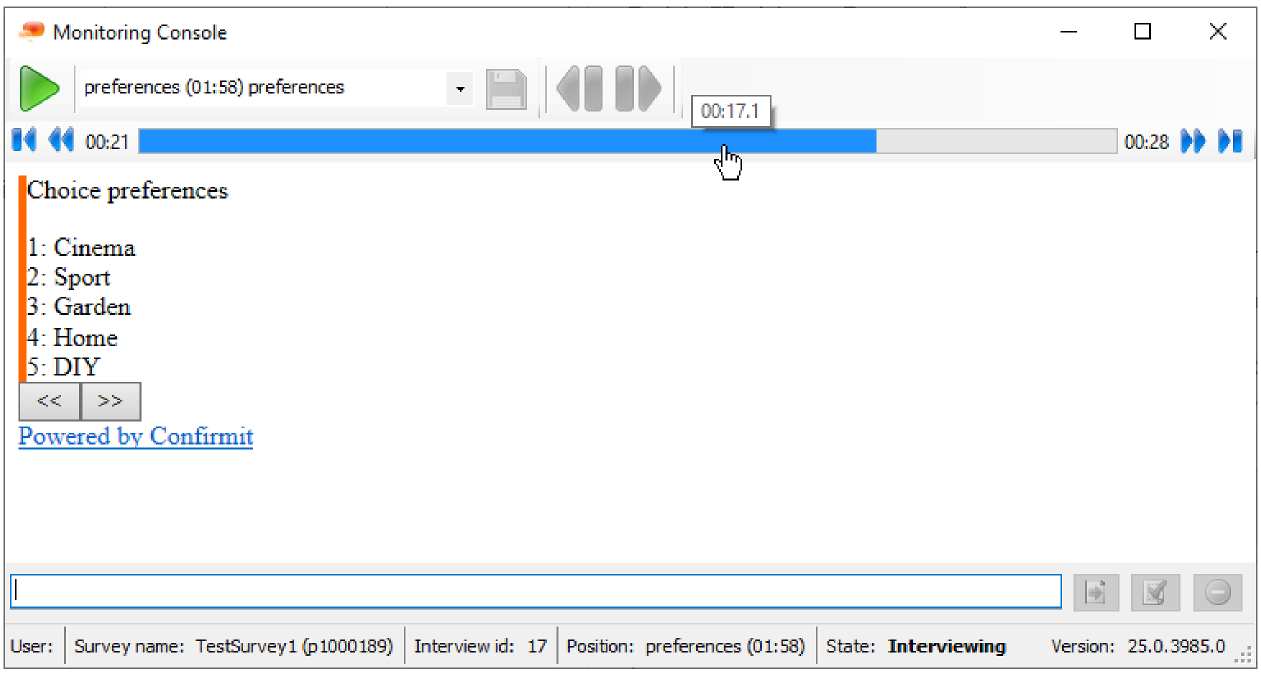


Figure 323 Example of a recorded interview displayed in the CATI Supervisor Player

The recorded interview is presented in the CATI Supervisor Player window. Bear in mind that this is a video recording so timing depends on the original interview.

In addition to the standard information set the status bar displays the name and starting position (time) of the interview question which is currently being played (the "Position" field).

You can stop and resume the playback, jump to a particular question in the interview, jump to a selected moment inside a question, skip 10 seconds forwards or backwards, and skip to the beginning of the current or next question.

To stop playback click the **Pause** button ; the button toggles to the **Resume** button . Click to restart.

There are two methods for selecting a question to jump to:

- Open the drop-down list beside the Pause/Resume button. A list of the questions opens; choose a question from the list. The interview playback resumes from the beginning of the selected question.

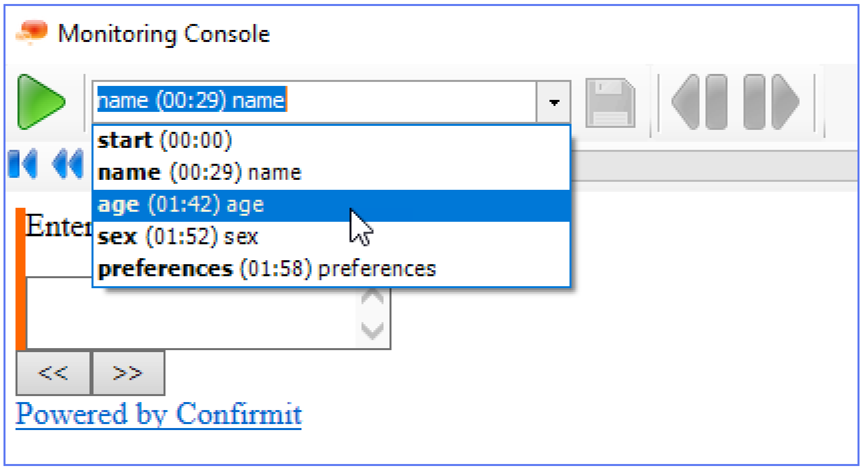


Figure 324 Choosing an interview question to jump to

Note that the questions in this list are accompanied by their start time (time elapsed since the interview was started).

If you know the question name you can start typing it directly in the search field. The player will automatically complete the name by choosing appropriate names from the list. Auto completion changes as you type to match the typed string. You can choose from the matching question names or type the name completely and press **Enter** on the keyboard. This will take you to the start of the chosen question.

If you jump to a question while playback is paused, the player will move to the start of the question but playback will not be resumed automatically; you must click **Resume** to restart playback.

The blue progress bar indicates the time elapsed from the start of the current question. You can jump to a particular location within the question - hover the mouse pointer over the progress bar, a tooltip above the pointer indicates the time at that location in mm:ss format(and tenths of a second for short timings). Click on the selected position to move the progress indicator to this location. If the playback was running it will resume from this location. If the playback was paused before you clicked the progress bar, click **Resume** to restart it.

The skip buttons to the left and right of the progress bar do the following:

- **Skip forwards** - skips 10 seconds forwards.
- **Skip back** - skips 10 seconds backwards.
- **Skip to beginning** - playback resumes from the beginning of the current question.
- **Skip to the track** - playback resumes from the beginning of the next question, or stops if this was the last question.

To adjust audio-video synchronization:

An audio track should ideally play in sync with the video. However audio and video tracks can become misaligned, so you can adjust the synchronization between the audio and video tracks by "nudging" the audio track two seconds back or forward.

Click the **Back** or **Forward** button in the Player toolbar (these buttons are only available when an audio track is present). One click moves the audio track two seconds along the video timeline in the appropriate direction.

To save the recorded interview:

While playback is in progress you can save the recorded interview to a location of your choice.

1. While the playback is running, click the **Save recording** button on the Monitoring console toolbar.

   Interview recording playback is paused and a standard Windows Save As dialog appears prompting you to choose the location where the file is to be saved.

2. Select/browse to the desired save location.

   On completion the Save As dialog closes and the Monitoring Console is presented with the interview playback paused.

3. Click **Resume** to restart playback.

   The saved file will have the .CSPO extension. This file is an archive container that can be opened by any archive management application capable of reading ZIP files. The CSPO file contains the following files:

- **events.cce** - the recorded interview events (video sequence).
- **audio.wav** - the audio track for the recorded interview. This file is only created if the interview contains an audio part which has been recorded according to the survey settings.
- **metadata.xml** - contains the record metadata (InterviewId, ProjectId, InterviewerId etc.).

The name of the downloaded file provides basic information regarding the recording. The format of the file name is:

ProjectID_InterviewID_TimeStamp_IntervuewerID_CallAttempt

The time stamp is the value in the Date cell in the list of recorded interviews and has the format DDMMYYYYHHMMSS. For example - CATI_p1089344_12_12012015132531_74.

On completion of the interview playback you can play another recorded interview or repeat the playback of this interview as desired. Any interview can be played back an unlimited number of times.

7.3. Monitoring Appointments

To monitor appointments go to **Activity Views > Appointment List** from the Navigation frame (go to Monitoring in the CATI Supervisor on page 295 for more information). The Appointment list opens in a separate window. By default the Appointment list displays the list of currently opened surveys with appointment information. The list contains the following information:

- Survey ID.
- Survey name.
- Count of appointments that fall into the short period specified for monitoring appointments (go to Setting Up Time Intervals for Monitoring Appointments on page 332 for more information)
- Count of appointments that fall into the long period specified for monitoring appointments (go to Setting Up Time Intervals for Monitoring Appointments on page 332 for more information)

You can choose to display the last two columns show count of appointments which fall into the corresponding time range.

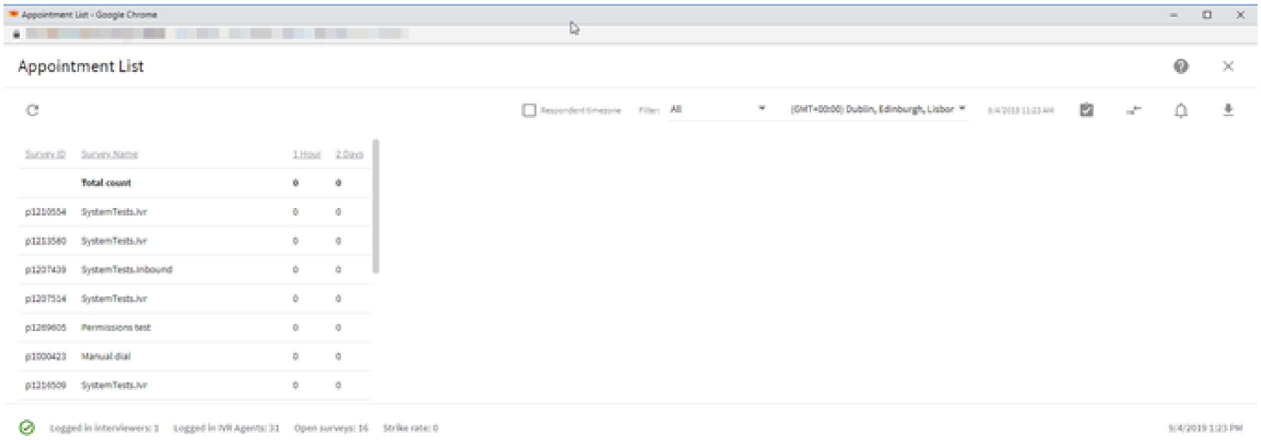


Figure 325 Activity Views > Appointment List

If any appointment alerts are set up and these alerts are triggered, the Appointment list window displays the alert list to the right of the survey list.

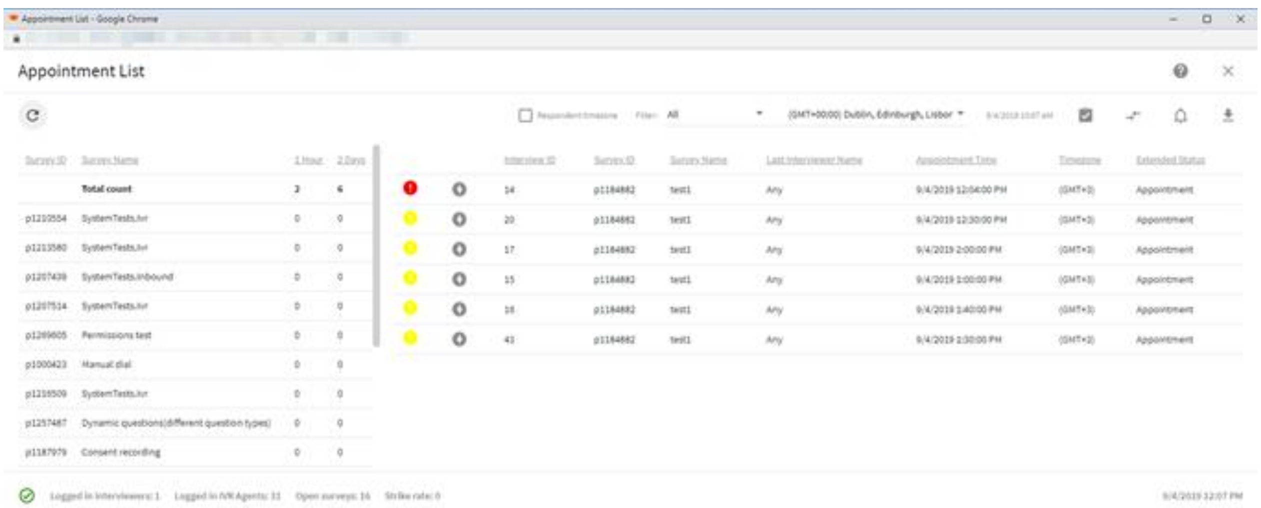


Figure 326 The Appointment List window displaying the list of alerts

The list of alerts provides the following information:

- Alert indicator icon - shows whether the appointment is due or overdue (go to Setting up Alerts for Monitoring Appointments on page 332 for more information)
- **Activate** button  - click to activate a call directly from the list (go to Setting up Alerts for Monitoring Appointments on page 332 for more information)
- Interview ID.
- Survey ID.
- Survey Name.
- Last interviewer name.

- Appointment time - the time assigned as the interview start time, displayed in either respondent or site local timezone.
- Timezone - the timezone the respondent is associated with.
- Extended status - the extended status which is currently assigned to this interview/call.

The Appointment List toolbar has the following buttons and indicators.

Button	Description	Function
	REFRESH	Click to update the appointment list manually.
Checkbox	RESPONDENT TIMEZONE	When checked, the appointment time in the respondent's local timezone is displayed. Otherwise the site local timezone is used.
Drop-down list	FILTER	Allows you to filter appointments by extended statuses.
Drop-down list	SELECT TIMEZONE	Select the timezone to be used to display all appointment time values.
Date and time indication	Current date and time in the selected timezone	Shows the current date and time in the timezone selected using the drop-down list in the toolbar.
	SELECT SURVEYS	Displays the survey selection form. Use this to select surveys for which the list of appointments are displayed in the grid.
	SET APPOINTMENT INTERVALS	Displays the monitoring intervals for appointments and allows specifying appointments.
	SET APPOINTMENT ALERTS	Displays the appointment alert form. Use this to specify the alert threshold for a parameter.
	EXPORT	Exports the current appointment list in MS Excel format.

7.3.1. Selecting Appointments to Display in the Appointment List

You can choose the surveys for which the list of appointments are to be displayed. Use the Survey Search form; here you can search for surveys by their names or you can apply filters to the survey list. To select the surveys to be displayed:

1. Click the **Surveys** button on the toolbar.

   The Select Surveys dialog opens (go to Selecting Surveys for the Survey List Activity View on page 297 for more information).

2. Select the surveys you want to view by checking their boxes in the left column then clicking the right-arrow to move them into the right column.

3. On completion click **Save selected**.

   The Appointment List is refreshed leaving only appointments relevant to the selected surveys.

7.3.2. Setting Up Time Intervals for Monitoring Appointments

The list of appointments displayed in the left column of the Appointment List window shows the number of appointments in short and long time intervals. The intervals are specified using the Select intervals for appointment counters overlay. Click the **Intervals** buttons to open the overlay.

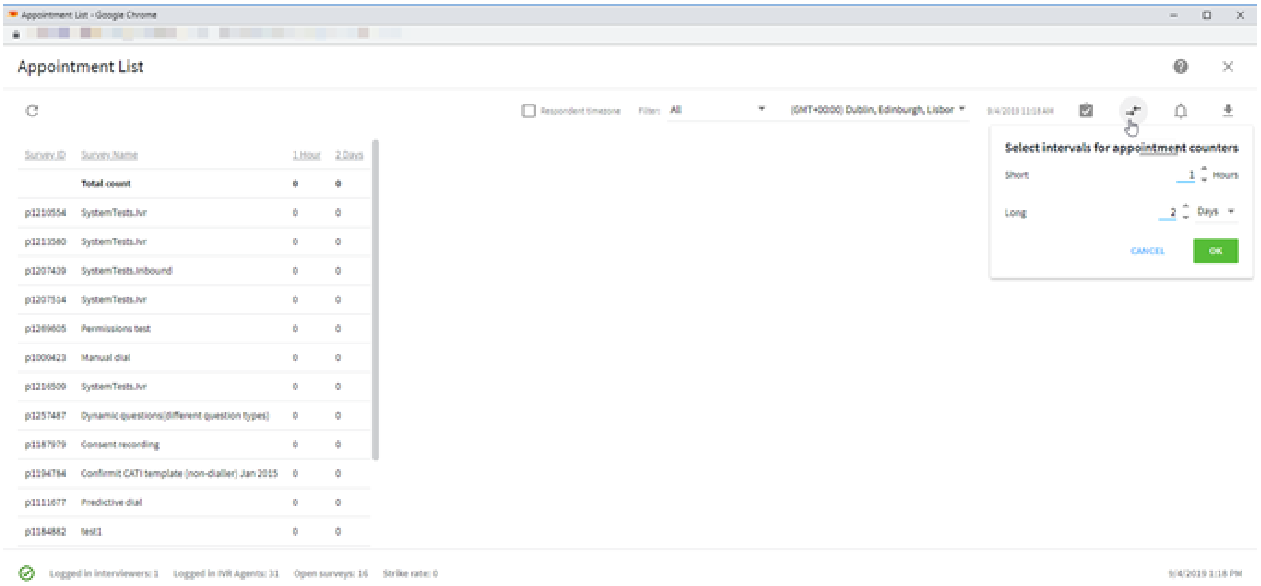


Figure 327 Setting up the intervals for appointment counters

The short interval is set in hours, the long period can be set either in hours or days.

Click **OK** to activate the monitoring values. The Appointment List will then display statistics for the specified intervals.

7.3.3. Setting up Alerts for Monitoring Appointments

Use Alerts to warn you of appointments that are due in a specific time period, and to warn you in the event an appointment is overdue. You can set up one time for the "About to be due" alert and another time for the "Overdue after" alert. These values are then used to monitor all appointments.

Cases may arise when an interviewer is unable to conduct an appointed interview at the specified time, or a situation may require that interview parameters must be changed. You can therefore modifying the parameters for an appointed interview. You can change the interview start time, its priority, or reassign the interview to another person or group.

To set up the appointment alerts:

1. Click the **Alerts** button on the Appointment List toolbar.

   The Appointment Time overlay opens.

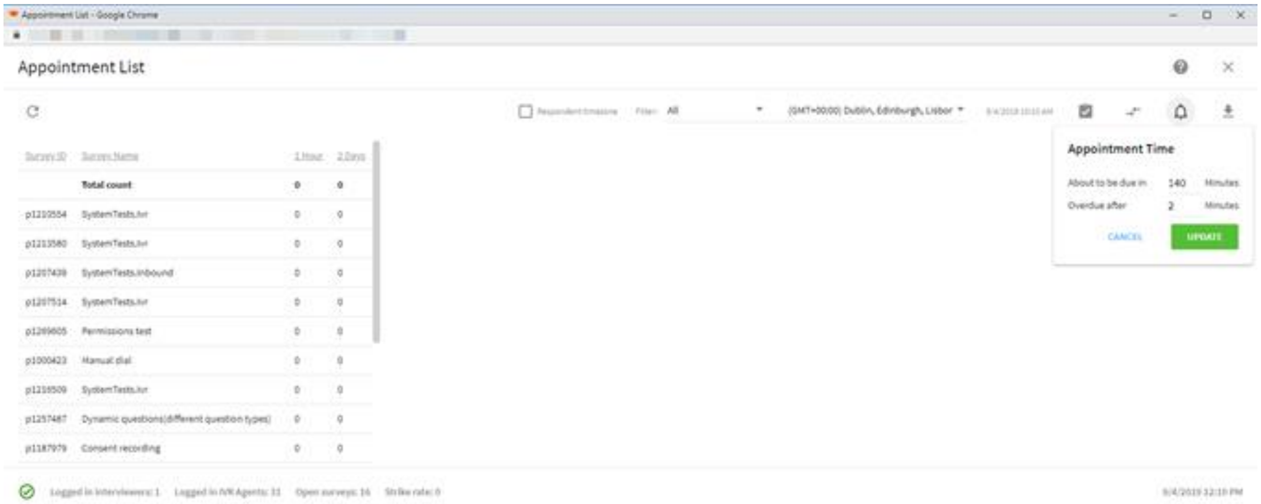


Figure 328 Setting up appointment alerts

2. Enter a value in the "About to be due in xxx minutes" field.

   This parameter creates alerts when appointments for this survey are due in the specified number of minutes.

3. Enter a value in the "Overdue after xxx minutes" field.

   This parameter creates alerts when appointments are overdue.

4. Click **Update** to activate the alerts.

When a specified alert threshold is reached for an appointment, the Appointment List displays the corresponding interview in the right panel.

You cannot remove the alert information from the list. An appointment is removed from the list automatically when the interview is delivered to an interviewer, when this appointment expires, or when the relevant survey is closed.

When the "Respondent timezone" box is checked, the appointment time is displayed in the respondent's timezone; otherwise the site local timezone is used.

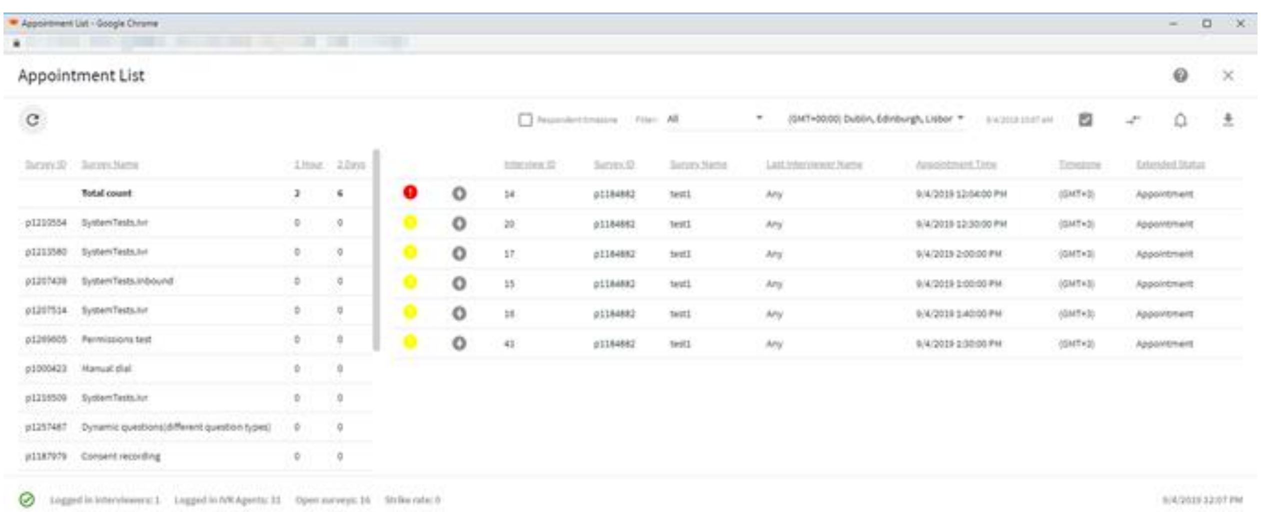


Figure 329 Monitoring the appointment alerts

Note that there are different procedures for creating an appointment, and the extended status of an interview/call will indicate how the appointment was set up. The extended status with the value "1" is called "Appointment", but any other status can potentially be used to manage appointments by applying the "Fulfill the specified appointment" action in the corresponding survey scheduling rule. The Extended Status column shows the real name of the extended status assigned to an interview/call.

- All extended statuses that have been set up to manage appointments are listed in the "Filter" drop-down box. Use the "Filter" control to filter alerts by the extended statuses.
- You can choose a timezone for the date/time values displayed in the toolbar. Use this to indicate the current time and date at the desired location.
- The Appointment List is refreshed automatically every minute, and you can refresh it manually by clicking on the **Refresh** button in the toolbar.
- The first column in the Appointment list displays the alert indicator; a yellow icon if the appointment is due within the specified time, or a red icon if the appointment is overdue.
- The second column contains the **Activate** button , click this to open the Activate dialog. Here you can modify the interview’s call parameters (go to Activating the Alerted Interview on page 334 for more information).

You can export the current Appointment List to a file in MS Excel format. To do this click the **Export** button (go to Exporting the Appointment List on page 334 for more information).

7.3.3.1. Activating the Alerted Interview

You can modify the parameters of the appointed interview when this interview appears in the appointment alert list. To do this, click the **Activate** button in the desired row in the list to activate the interview. You can now change the interview priority, time and date of the interview start, and you can also reassign the interview to another person or group (go to Activating an Interview/call on page 143 for more information).

7.3.4. Exporting the Appointment List

You can export the appointment list as an MS Excel sheet.

1. Display the Appointment List window.
2. Set the required survey filter (go to Selecting Appointments to Display in the Appointment List on page 331 for more information).
3. When the Appointment List window shows information for the required appointments, click the **Export** button on the window toolbar.

   The appointment list is saved as an MS Excel file to a location specified in the default browser settings.

8. Working with the Resources Objects

Various tools and facilities of the Resources type are used to configure the CATI Supervisor module. The following Resources tools are available:

- **Extended Status Codes** - a list of codes which are used to determine the current state of the interview/call.
- **Break classifications** - a list of available break types for interviewers to select from. Explains break purpose and separates paid and unpaid break types.
- **Call groups** - allows creating and managing groups of calls with specific extended statuses. These groups can then be assigned to particular interviewers (available only for users belonging to designated companies).
- **Dialer** - a group of settings used to configure the way the dialing system handles specific dialing routine situations.
- **Inbound settings** - this section contains settings related to "dial-in" calls. This is available as a chargeable add-on.
- **External transfer** - allows you to add and manage "external" (that is, not related to the current company) telephone numbers that will be used for call transfers.
- **IVR settings** - a set of options related to "machine-guided" interviews (when the respondent is guided by robot-read or recorded messages, and provides answers by pressing phone keys).
- **Telephone Blacklist** - a list of numbers that are not to be used by the dialer.
- **Master Timezone List** - a complete list of time zones.
- **Active Timezone List** - a list of time zones currently used by the CATI Supervisor module.
- **Tasks** - a list of tasks that were performed by supervisors assigned to the current call center.
- **Download CATI console** - generates a link to download a CATI interviewer console setup file.
- **Download CATI monitoring console** - generates a link to download a CATI monitoring console setup file.
- **About CATI Supervisor** - displays general information about the copyright and the software version.

To display the list of the Resources tools and facilities choose **Resources** in the Navigation menu to open the menu. Select the tool/facility you need from this list.

8.1. Configuring the Extended Status Groups

A web survey interview can assume one of several of statuses, for example Complete, Screened or QuotaFull. In CATI, a number of additional statuses (Extended Statuses) are used to record the various outcomes a call may terminate with, for example Busy, No reply, Appointment (for a follow up call) etc. (go to Appendix F - List of Predefined Extended Statuses on page 468 for more information).

The CATI Supervisor module allows Extended Status Codes to be separated into groups for convenience.

Extended status codes are usually applied on the survey level as a set containing all the required statuses. Some extended statuses may require a priority change to suit the survey, and for some activation may be disallowed. You can rename extended statuses that are not predefined. It may be convenient to separate a modified set into a Group of Extended Status Codes, and you can create a number of such groups.

An Extended Status Code Group must be specified as a survey property (go to Viewing and Modifying a Survey's General Properties on page 68 for more information).

When working with the Extended Status Code objects you can perform the following operations:

- View the Extended Status Code group list.
- Add and delete Extended Status Code groups.
- View and modify Extended Status Code properties.
- View and modify Extended Status Code group properties.

- Export and import Extended Status Code groups.

8.1.1. Viewing the Extended Status Code Group List

To perform operations with the Extended Status Code groups you should change to the Resources tab and choose the Extended Status Codes from the drop-down list.

To view the Extended Status Code group list:

1. Go to the **Resources** tab in the Navigation menu and choose **Extended Status Codes** from the drop-down list.

   A list of Extended Status Code groups is displayed.

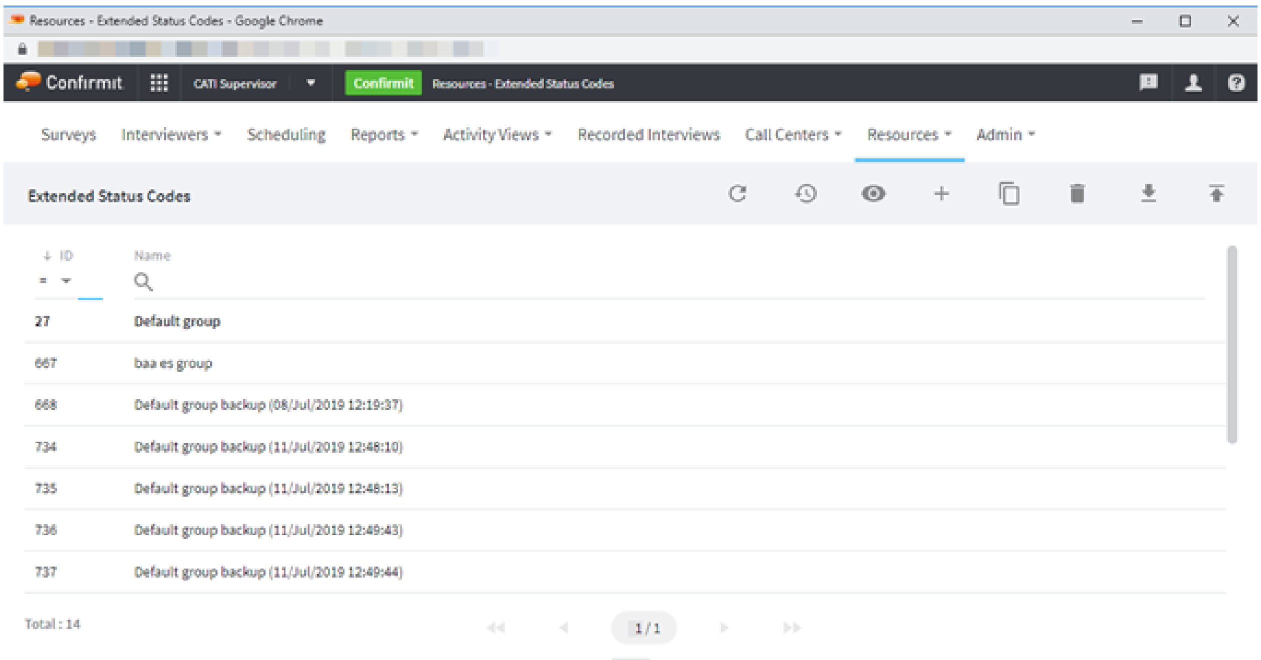


Figure 330 Viewing the Extended Status Code group list

You can perform the following operations with the Extended Status Code groups:

- View and modify the Extended Status Code group properties.
- Copy properties of an existing Extended Status Code group to the default Extended Status Code group.
- Export and import Extended Status Code groups.
- Add or delete Extended Status Code groups.
- Duplicate an Extended Status Code group.

These operations can be performed from the shortcut menu (right-click the row containing the desired Extended Status Code group), or by selecting a row in the grid and clicking the appropriate buttons on the toolbar.

   To refresh the Extended Status Code group list click the **Refresh** button on the toolbar.

3. When the Extended Status Code groups list is displayed, its toolbar contains the following object-specific button set.

Button	Description	Function
	REFRESH	Updates the Extended Status Code group list
	NEW	Displays the Add Extended Status Code group dialog so you can create a new Extended Status Code group
	PROPERTIES	Displays the Extended Status Code group properties. You can edit these properties.
	DUPLICATE	Duplicates the selected Extended Status Code group.
	DELETE	Deletes the selected Extended Status Code group
	EXPORT	Export the selected Extended Status Code group
	IMPORT	Import the selected Extended Status Code group

8.1.2. Adding a New Extended Status Code Group

To add a new Extended Status Code group:

1. With the Extended Status Code group list open, click the **New** button on the toolbar, or right-click any row in the list in the grid and choose **New** from the shortcut menu.

   The New Status Group dialog opens.

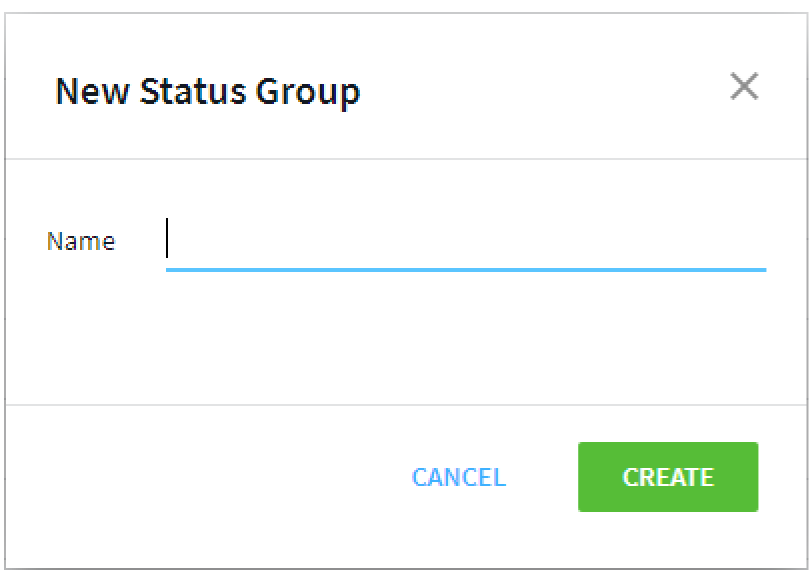


Figure 331 The new Status Group dialog

2. Enter the name for the new group in the Name field and click **Create**.

The Extended Status Code group list refreshes and the new group appears in that list.

Each new group of Extended Status Codes contains a predefined default set of Extended Statuses. You cannot delete the extended statuses from this set, but you can change the extended status properties. Not all of the Extended Status Code properties are editable (go to Viewing and Modifying the Extended Status Code Group Properties on page 338 for more information).

8.1.3. Viewing and Modifying the Extended Status Code Group Properties

To view and modify the Extended Status Code group properties:

1. Double-click the Extended Status Codes group item you wish to edit, or click the **View** button on the toolbar, or right-click its name and choose **View** from the shortcut menu.

   The Extended Status Code group properties are displayed.

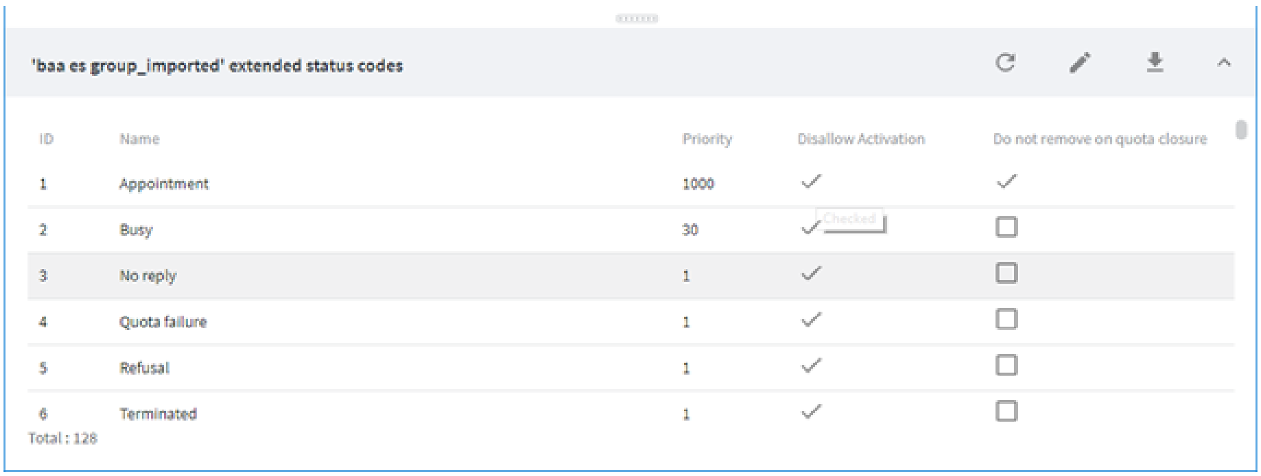


Figure 332 Viewing the extended status list

The list of extended statuses normally contains a set of 30 predefined statuses, for which the ID and name cannot be changed. Each new group added to the list already contains such a set. These predefined extended statuses are assigned IDs 1 through 30. In addition, each Extended Status group contains a number of "custom" statuses with IDs ranging from 31 to 1000. The properties of the "custom" statuses, with the exception of their ID values, can be edited . There is also a special group of predefined Extended Statuses with IDs greater than 1000, and their IDs and names can not be changed.

Note that you can neither delete, nor add a new extended status to a group; you can only modify the editable properties of the available extended statuses.

To view and modify the Extended Status properties:

1. Either double-click the selected status name in the list, or select the status name and click the **Edit** button in the bottom right frame toolbar, or right-click the selected name, and choose **Edit** from the context menu.

   The Edit dialog with the current status properties opens.

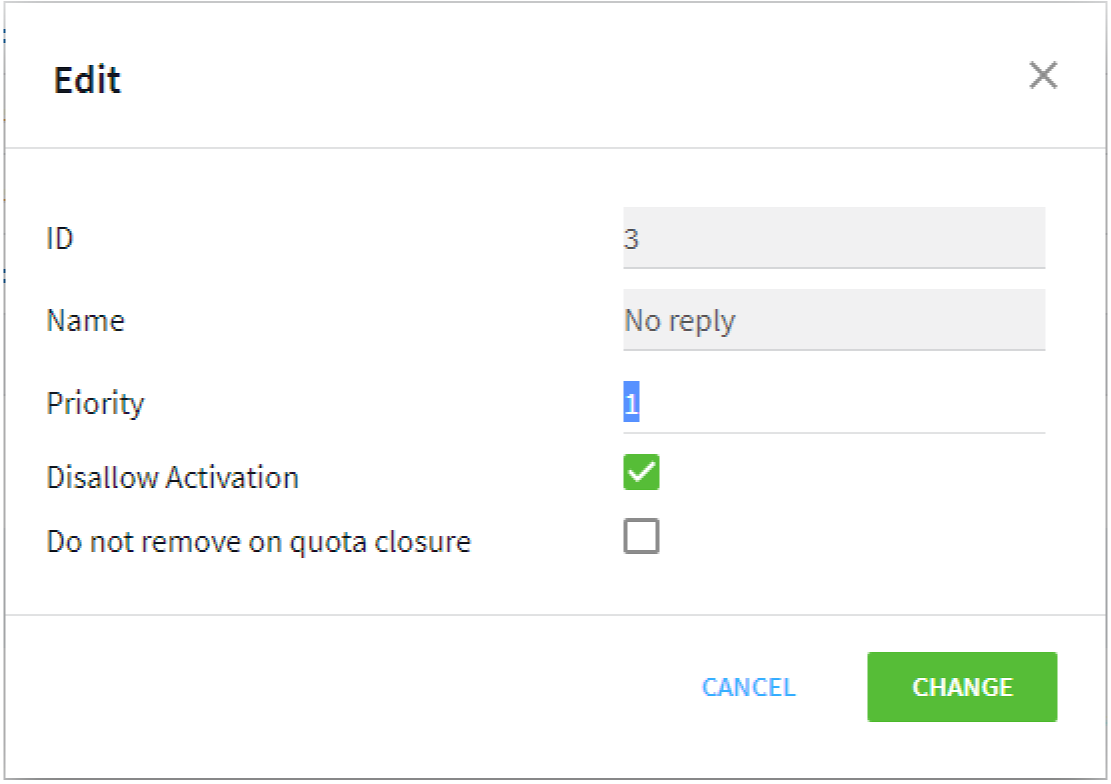


Figure 333 The Edit dialog

The default priority value is assigned to calls with this status when a "Move and Reschedule" operation is applied to the call in Call Management. For example, say that the default priority for a "Busy" status is set to 5. When a supervisor moves and re-schedules any call in any status to the "Busy" status, then the priority for the call will be set to 5.

Note that if the status has already been given a priority value in the survey, then the default value set in the Edit dialog is overridden by the value set by the survey.

2. For the first 30 statuses (ID ordinal number) you can modify the Priority value and check (enable) or clear (disable) the **Disallow Activation** box. Statuses with the ID value in the range 31 to 1000 are "custom" statuses and their names can be changed.

   When the Disallow Activation option is enabled (the box is checked), all interviews/calls with that extended status cannot be assigned the Active state (go to Viewing the Interview/Call List on page 118 for more information).

   When a quota is closed calls with any Extended Status value but "1" by default are removed from the list of Scheduled calls. You have an option to filter calls as to which will remain in the list of Scheduled calls on quota closure.

   When the "Do not remove on quota closure" option is enabled (this box is checked) for a given Extended Status all interviews/calls with that extended status will remain in the list of Scheduled calls on quota closure. Otherwise they will be removed. By default the Extended Status for Appointments is checked (calls with this extended status will stay on the scheduled list on quota closure). Refer to (go to Configuring Settings Related to the Entire Company on page 447 for more information) for more information on "Call filtering behaviour for filled quotas".

   Click **Change** in the Edit dialog to confirm property changes.

3. Repeat the procedure to modify properties of other extended statuses.

8.1.4. Copying the Properties of an Extended Status Code Group

If you frequently find it more convenient to use a particular extended status group with the surveys you run, you can use this group's properties as the default by copying the properties to the Default group. To do this:

1. Select an Extended Status Code group in the list.
2. Right-click on it and choose **Copy to default** from the context menu that appears.

   The system creates a backup copy of the current default group then copies over all the settings of the selected group.

   The newly created default group is assigned the "Default group" name while the previous default group will be given a name ending in **...backup (time/date stamp)** showing the time and date this backup was created (go to Viewing the Extended Status Code group list on page 336 for more information).

8.1.5. Deleting an Extended Status Code Group from the List

To delete an Extended Status Code group:

1. With the Extended Status Code list opened in the upper frame, select the required group in the list.
2. Click the **Delete** button on the toolbar, or right-click the required group row and choose **Delete** from the shortcut menu.

   The selected Extended Status Code group is deleted from the list.
3. Repeat the procedure for other groups if needed.

8.1.6. Exporting and Importing an Extended Status Code Group

You can export any selected Extended Status Code group from the list. The exported group is saved as an XML file, which can later be imported into another or the same CATI Supervisor system.

To export an Extended Status Code group

1. Go to the Extended Status Code group list and select the Extended Status Codes group item that you wish to export.
2. Click the **Export** button on the toolbar, or right-click the group name in the list and choose **Export** from the shortcut menu.
3. In the standard Windows Save As dialog that appears, browse to the save location and enter the desired file name.
4. Click **Save**.

   The file is saved in XML format.

To import an existing file with Extended Status Code group contents

1. Display the Extended Status Code group list and click the **Export** button on the toolbar.
2. In the standard Windows Open file dialog that appears, browse to and select the file you wish to import, and click **Open**.

   Note that the name of the Extended Status Code group contained in the file selected for import cannot be the same as an already existing group. If the system encounters a name match it will terminate the import procedure and display a warning message. You will then have to edit either the name of the group existing in the system or the name of the group you wish to import.

   When the import process is complete, the imported group appears in the Extended Status Code group list.

8.2. Configuring the Call Groups

Call Groups are used to create and manage groups of calls with specific extended statuses that can be assigned to selected interviewers.

The purpose of a Call Group is to define a set of calls with certain extended statuses that have a higher priority than other calls, and are to be delivered to the interviewers before other calls.

Note that for the interviewer to be able to work in the Call Group mode, they must first be assigned to work in the Survey Selection Interviewing mode, then the Call Group mode must be enabled for them (go to Viewing and Modifying the Interviewer Properties on page 38 for more information). The Call Group mode must also be enabled for the specific survey (go to Viewing and Modifying a Survey's General Properties on page 68 for more information).

Note that Call Groups are not supported for surveys with the predictive dial mode enabled.

The interviewer working in the Survey Selection Interviewing mode will receive calls in the following order. Calls are delivered in the round robin fashion:

1. Calls having the highest call priority.
2. Calls with the highest extended status priority.
3. Calls with the explicit assignment.

Important!
If a priority value had previously been individually assigned to a particular call, then this priority value will take precedence over the value assigned to the call through the Call Group.

After a call group is created you can assign it to the interviewers. You can also assign an interviewer to a call group; to do this modify this interviewer's properties (go to Viewing and Modifying the Interviewer Properties on page 38 for more information).

Important!
For the interviewer to start working in the Call Group mode, they must be assigned to a call group, they must work in the Survey Selection Interviewing mode, and the Call Group mode must be enabled for the survey they are working with.

8.2.1. Viewing the Call Group List

To perform operations with Call Groups you need to display the Call Group list.

To view the Call Group list:

1. Choose the Resources tab in the Navigation menu and select the **Call Groups** item in the drop-down menu.

   The list of Call Groups opens.

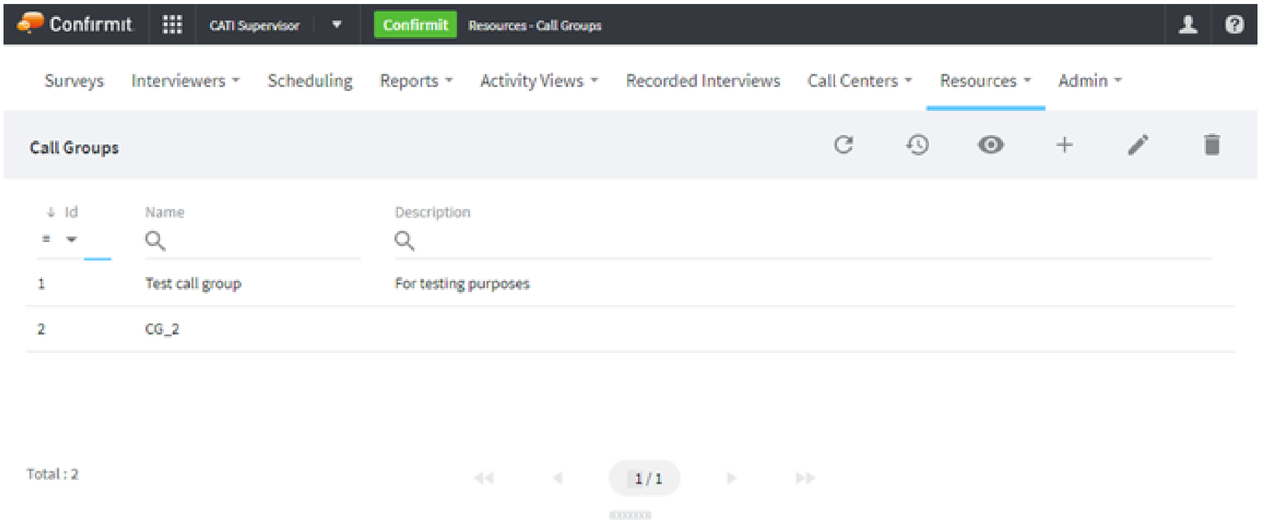


Figure 334 Viewing the Call Group list

You can perform the following operations with the Call Groups:

- View and modify the Call Group parameters and properties.
- Add or delete Call Groups.
- Refresh the Call Group list.

Operations are performed by either choosing commands from the shortcut menu (activated by right-clicking the grid row containing the appropriate Call Group description), or by selecting a row in the grid and clicking buttons on the toolbar.

The Call Groups toolbar provides the following object-specific button set.

Button	Description	Function
	REFRESH	Updates the Call Group list.
	NEW	Displays the Add Call Group page and allows you to create a new Call Group.
	VIEW	Displays the parameters of the selected Extended Status Code group in a page. You can edit these parameters.
	PROPERTIES	Displays the Call Group properties in the bottom frame. You can edit these properties.
	DELETE	Deletes the selected Call Group(s)

8.2.2. Adding a New Call Group

To add a new Extended Status Code group:

1. With the Call Group list opened in the top frame click the **New** button on the toolbar, or right-click any row in the list in the grid and choose **New** from the shortcut menu.

   The New Call Group page opens.

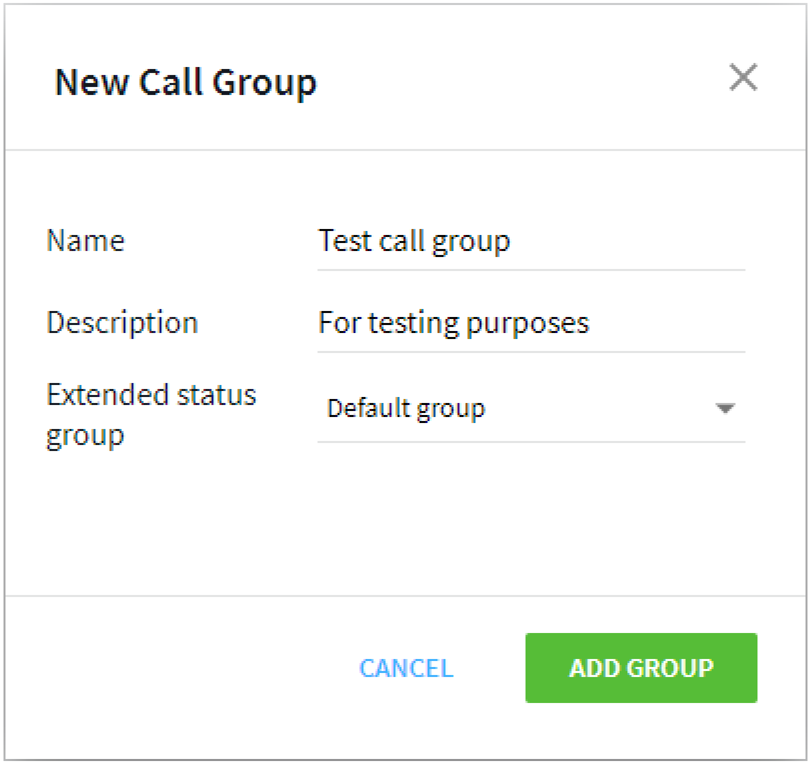


Figure 335 Example of the New Call Group page

2. Enter the name for the new group in the Name field and optionally a description in the Description field.
3. Choose the Extended status group from the drop-down list.

   You can choose from the list of available extended status groups (go to Configuring the Extended Status Groups on page 335 for more information). The chosen Extended status group is used with the current Call Group.
4. Click the **Add Group** button.

   The page closes and the newly created call group appears in the Call Group list.

8.2.3. Viewing and Modifying the Call Group Properties

To view and modify an existing call group properties:

1. With the Call Group list open, click the **Properties** button on the toolbar or right-click a row in the list in the grid and choose **Properties** from the shortcut menu.

   The Edit Call Group page opens.

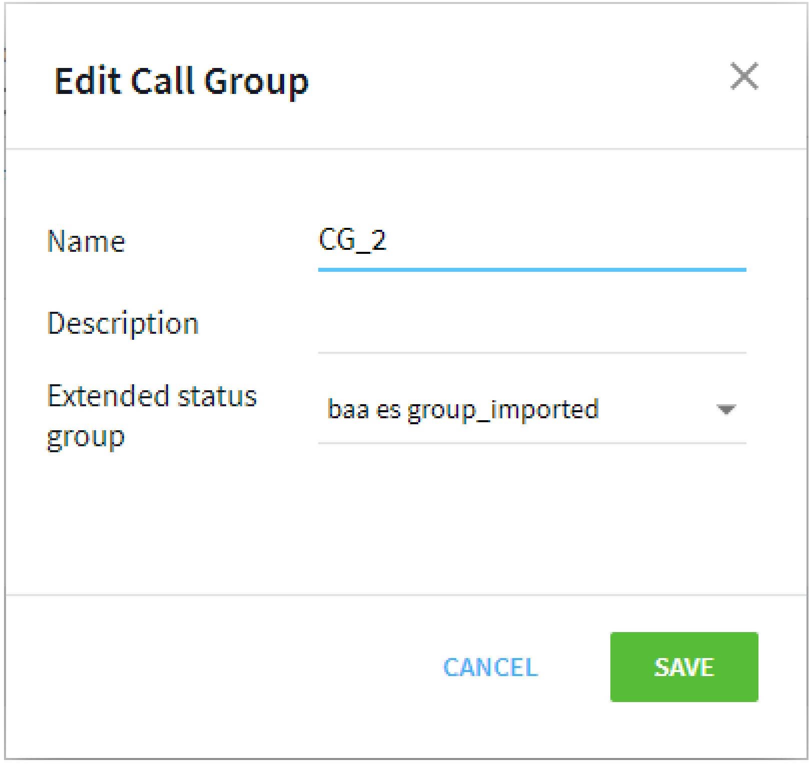


Figure 336 The Edit Call Group page

2. Edit the name of the call group in the Name field and the description in the Description field
3. Choose the Extended status group from the drop-down list.

   You can choose from the list of available extended status groups (go to Configuring the Extended Status Groups on page 335 for more information). The selected Extended status group will be used with the current Call Group.
4. Click the **Save** button.

   The page closes and the call group with modified properties appears in the Call Group list.

8.2.4. Viewing and Modifying the Call Group Parameters

Use this procedure when you need to configure the parameters of a freshly created call group or edit the parameters of an existing call group.

Make a note of the delivery algorithm when you configure the call group parameters (go to Configuring the Call Groups on page 341 for more information).

Important!
For the interviewer to start working in the Call Group mode, they must be assigned to a call group, they must work in the Survey Selection Interviewing mode, and the Call Group mode must be enabled for the survey they are working with.

Note that a list of the predefined extended statuses is given in Appendix F (go to Appendix F - List of Predefined Extended Statuses on page 468 for more information)the Modifying the Interview/Call Properties topic presents details on how Extended Status Codes are used with interviews and calls (go to Modifying the Interview/Call Properties on page 135 for more information).

To view the Call Group parameters:

1. Double-click the Call Group item in the list and click the **View** button on the toolbar, or right-click its name and choose **View** from the shortcut menu.

   The properties of the selected Call Group are displayed.

Figure 337 Viewing the Call Group parameters

To edit the Call Group parameters:

1. To add an extended status to the call group, in the Extended Statuses tab click the **Add** button .

   The Add Statuses dialog opens.

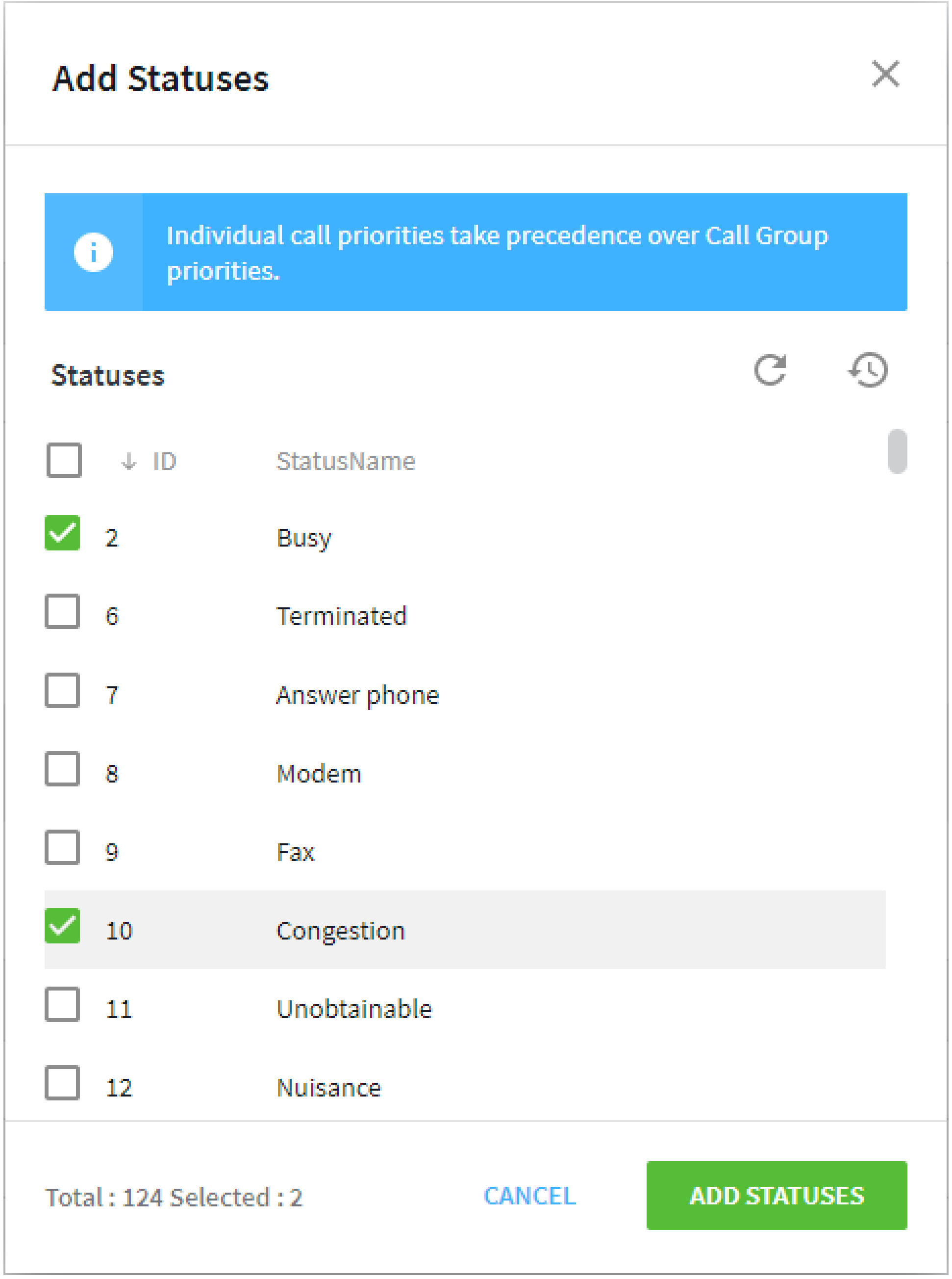


Figure 338 The Add Statuses dialog

The dialog lists those extended statuses that are not included in the Call Group list. Select one or a number of extended statuses from the list by checking the appropriate boxes, and click Add Statuses button below the list when you are done.

Selected extended statuses will appear on the Extended Statuses tab in the bottom frame.

2. To delete extended statuses from the Call Group, select one or more extended statuses in the list on the Extended Statuses tab and click **Delete**, or right-click any selected row and choose **Delete** from the context menu.

   A confirmation message is displayed; click **OK** to delete the selected extended statuses.

3. By default all extended statuses are added to the list with the priority value 1. You can change the priority of a group, and you can prevent calls with certain extended status from being delivered by changing the priority value of the call group to 0.

   To change the priority value either double-click the required extended status in the list on the Extended Statuses tab, or click the **Change Priority** button on the frame toolbar, or right-click the required extended status and choose **Change Priority** from the context menu.

   The Change Priority dialog opens.

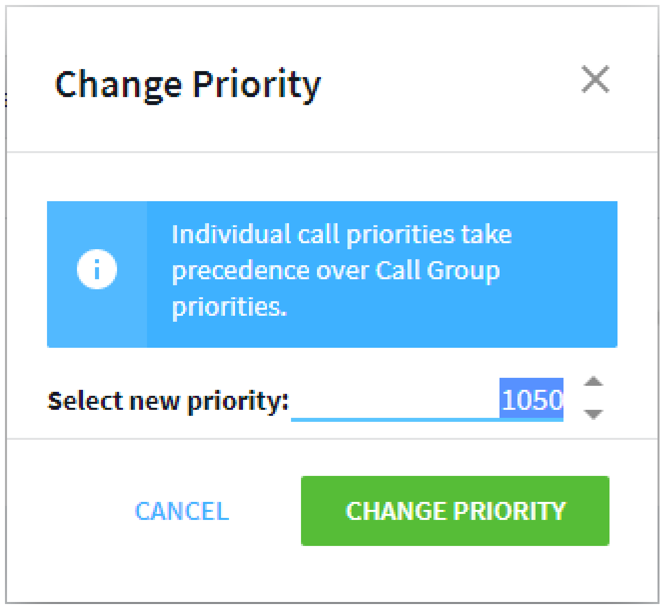


Figure 339 Changing the priority value of the selected extended status in the Call Group

   Select the new priority value, then click **Change Priority** to confirm your selection.

   The modified priority value is displayed in the Priority column for the corresponding extended status on the Extended Statuses tab.

Important!
If a priority value had previously been individually assigned to the particular call, then this priority value will take precedence over the priority value assigned to the call through the Call Group.

4. You can assign interviewers to the call group. To do this go to the Interviewers tab in the lower frame.

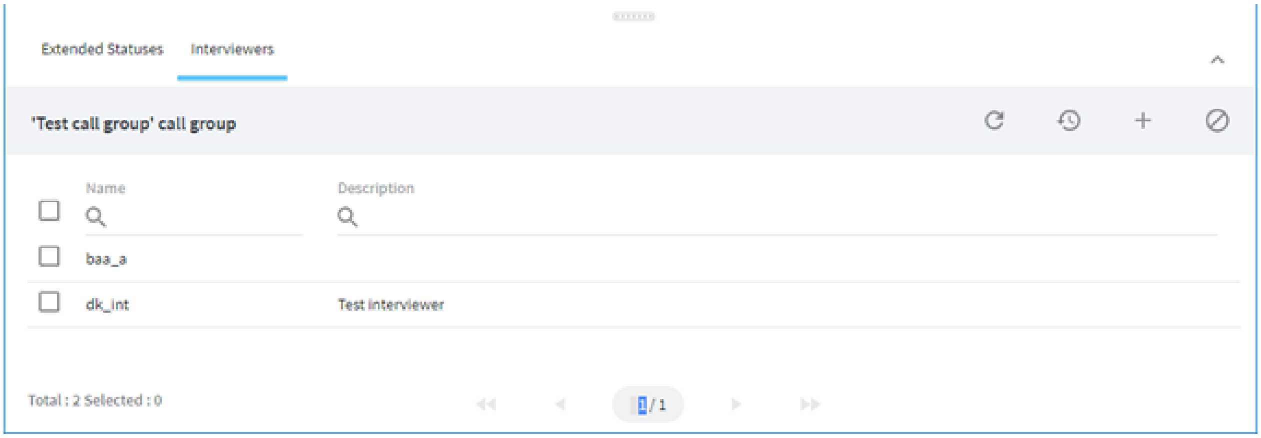


Figure 340 Example of the Interviewers tab

To add an interviewer to the call group click the **New** button + on the toolbar. The Add Assignment dialog opens.

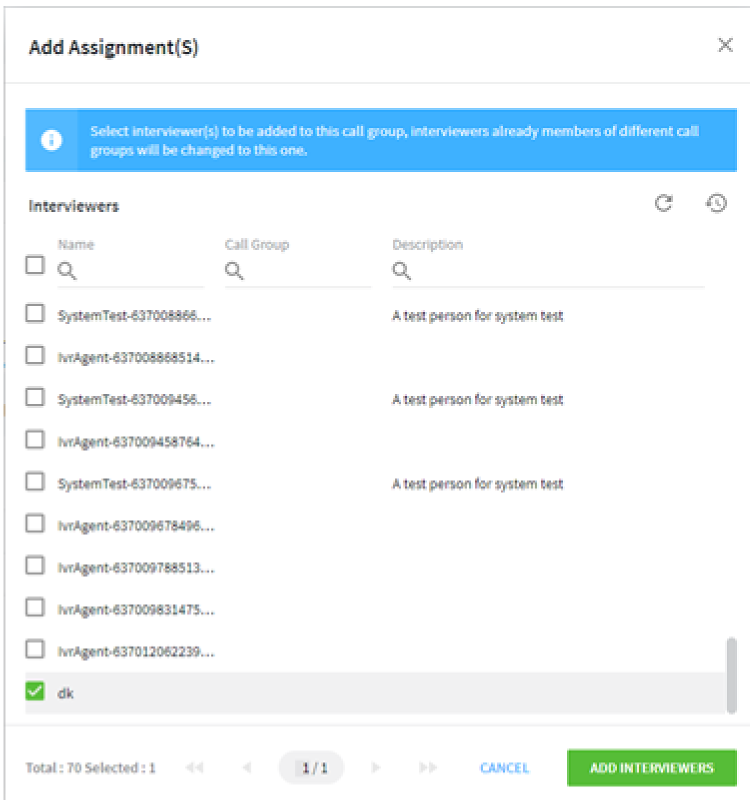


Figure 341 Assigning a new interviewer to the call group

Select one or more interviewers in the list and click **Add interviewers**. The selected interviewers will appear in the list on the Interviewers tab.

5. You can remove interviewers from the call group. To do this select the relevant interviewers in the list on the Interviewers tab and click the **Deassign** button ⊘ on the frame toolbar.

A confirmation message is displayed, click **OK** to confirm. The selected interviewers are deleted from the list of assigned interviewers.

8.3. Dialer

A dialing system is a hardware/software item that performs the telephone number dialing task in a CATI system. It frees the interviewer from the dialing job and automatically delivers connected calls to them in the way specified by the CATI Supervisor. If the dialer is busy the interviewer must just wait for another connected call - they do not need to perform dialing tasks themselves. A dialer is usually a third-party service provided by a telephone company or an Internet service provider etc. A dialer works in conjunction with the CATI Supervisor module and performs the following tasks:

- It accepts the command to commence dialing in the specified dialing mode (see the explanation below) the telephone numbers contained in the sample.
- It tracks and processes the dialing results according to the specified dialing mode.
- It tracks and processes the interviewers' load level.
- It delivers the connected calls to the interviewers.

The CATI Supervisor application can use different dialer types - TCI, ProTS or another system. The differences between the dialer types mainly involve the service functions they provide (go to Managing Dialers on page 350 for more information). You can perform the following operations with any dialer that is currently shown in the dialer list:

- You can add a dialer and configure the dialer settings.
- You can edit a dialer and the dialer settings.
- You can delete a dialer.
- You can connect/activate a dialer.
- You can disconnect/de-activate a dialer.
- You can view a dialer log file.

The dialer settings are displayed in the lower frame. These settings apply to all dialers that are currently used by the company. The same settings are available on the **Survey View > Dialer Settings** tab (go to Configuring the Survey Related Dialer Settings on page 104 for more information). These settings override the company-wide settings and they are applied only to the current survey.

The CATI Supervisor module can work with a number of dialers concurrently. All available dialers are listed on the **Resources > Dialer** tab.

Important!
In the event multiple dialers are used with the CATI Supervisor application, they must all be of the same type; either TCI dialers, or ProTS dialers. The CATI Supervisor module cannot work with dialing systems of different types simultaneously.

The dialer must be available and operational so that the CATI Supervisor module can access it and exchange information and commands. The dialer is initially enabled by the supervisor and then it can be engaged or rejected by each interviewer who logs in to work with the CATI Interviewer Console. To allow interviewers to engage the dialer, the supervisor must connect and activate it first (go to Managing Dialers on page 350 for more information).

The CATI Supervisor module monitors the current state of each dialer and displays this information (go to Managing Dialers on page 350 for more information).

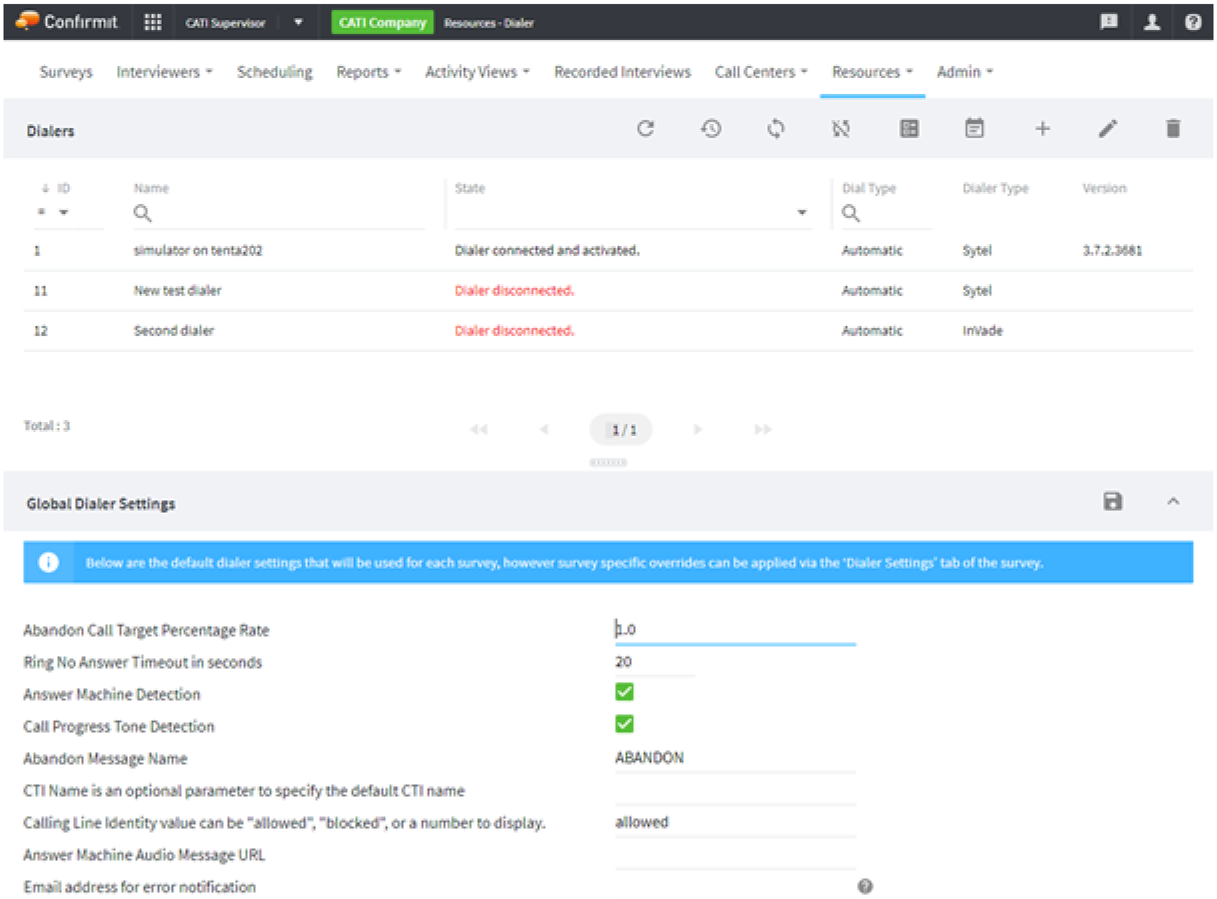


Figure 342 A list of dialers used in a company

8.3.1. Managing Dialers

The CATI Supervisor module can work with a number of dialers concurrently. All available dialers are listed on the **Resources > Dialer** tab.

Important!
In the event multiple dialers are used with CATI Supervisor, they must all be of the same type - either all TCI dialers, or all ProTS dialers. the CATI Supervisor module cannot work with dialing systems of different types simultaneously.

You can monitor the current status of each dialer and connect/activate or disconnect/deactivate a selected dialer individually, or multiple dialers simultaneously.

When a dialer is connected it can be managed and configured by the supervisor. A connected dialer can be activated - this makes the dialer accessible to interviewers. Connecting a dialer beforehand saves time when you need to activate it promptly.

When a dialer is deactivated it becomes inaccessible to those interviewers who are not currently working with it. The interviewers who are already working with it can continue current interviews until another dialing job is due, then they will be logged out automatically. Before this logout takes place, the CATI Interviewer Console will display a warning message informing the interviewer of the forced logout. The interviewer cannot be automatically re-addressed to continue his work with another dialer while he/she is logged into the Interviewer Console.

When a dialer is disconnected for technical reasons, all interviewers working with the dialer will receive a "telephony error" warning message. Contact a system administrator or designated technical support person if the system does not resume within a short period.

Important!
You must terminate the current task for any interviewers who are automatically logged out due to dialer failure. Do this via the Interviewer List window - click the Terminate icon for the relevant interviewer (go to Monitoring Interviewers and their Work on page 303 for more information). Interviewers who are logged out automatically will not be able to log in to resume work with the Interviewer Console until the Terminate command is performed.

All dialers work independently of the CATI Supervisor module; the dialer remains in the chosen state (connected/disconnected, activated/deactivated) whether or not the CATI Supervisor module is running. The current dialer status is displayed in the State column in the table.

The **Dial Type** column indicates whether this dialer is the one that is allowed to dial the mobile phone numbers (Manual), or not (Automatic). This indication helps to comply with the Telephone Consumer Protection Act prohibiting automatic dialing of mobile phone numbers (go to Dialing in the Single Survey TCPA Mode on page 357 for more information).

The **Dialer type** column displays the type of dialer currently used with the system (Pro-T-S or TCI etc.). If a number of dialers are used concurrently, all must be of the same type.

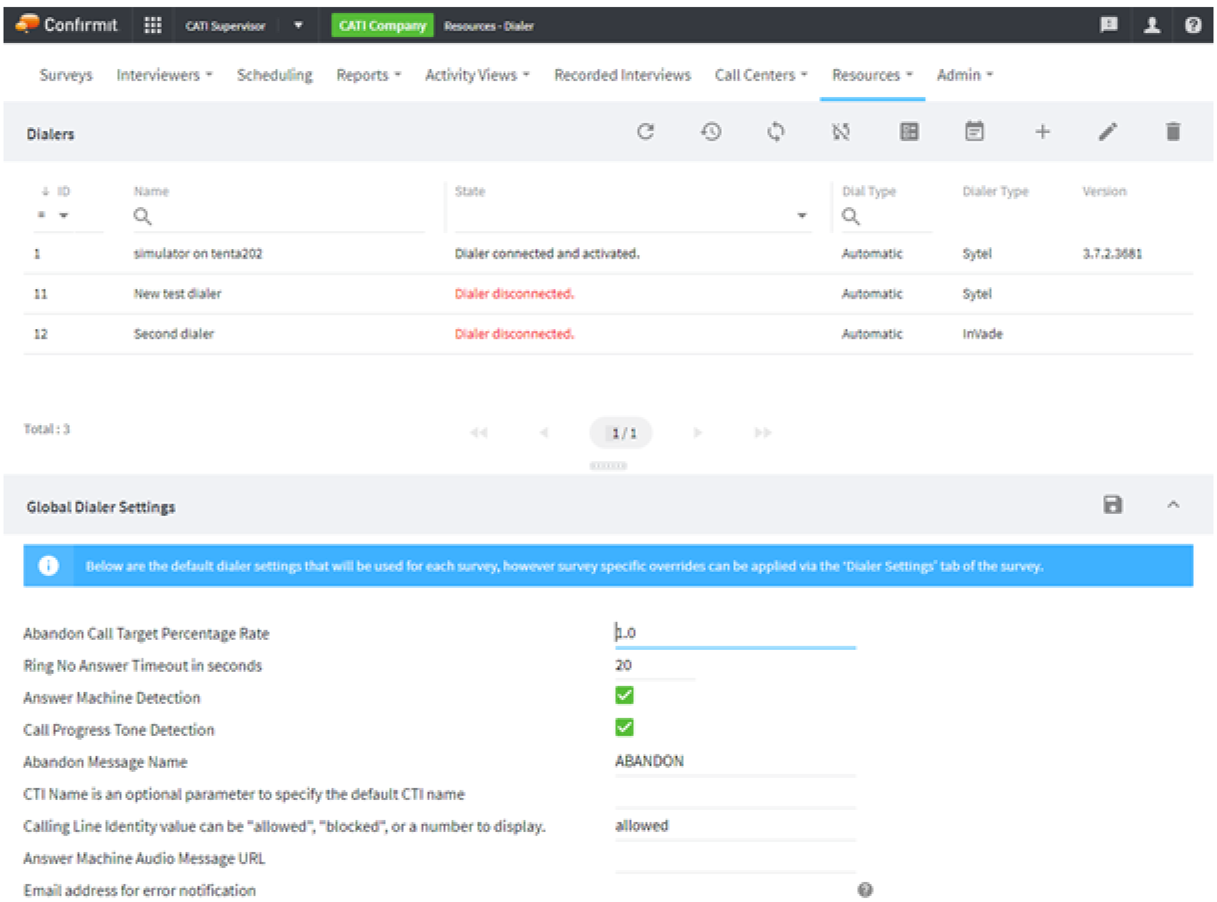


Figure 343 The list of dialers available in the system

Dialer settings are displayed in the lower frame. The dialer settings are company-wide settings and apply to all dialers currently used with the company. They will therefore be the same for all the dialers listed on the page, and they are used automatically for each survey. The dialer settings can be overridden separately for each survey: the same settings are available on the **Survey View > Dialer Settings** tab (go to Configuring the Survey Related Dialer Settings on page 104 for more information). The settings available are different for different dialer types - refer to the dialer's documentation for details, or view the tool-tips accessed by pressing the help button next to the relevant field.

The **State** column in the upper frame indicates whether the dialer is connected and activated. The following dialer states are displayed:

- **Dialer connected and activated** - means that this dialer is connected and available to interviewers. They can log in to work with this dialer.
- **Dialer connected (but not currently activated)** - means that the dialer is connected and available for configuration, but it is not available to interviewers so it cannot be used for conducting interviews at this time.
- **Dialer disconnected** - means that either a supervisor has disconnected the dialer intentionally, or connection with this dialer has been lost for some reason, or the current company does not use a dialer to conduct surveys. This dialer is not available for interviewers and cannot be configured at this time.

A situation may arise when the dialer cannot be accessed and therefore fails to be connected. The supervisor has an option of activating a dialer at the same time they connect to it, or de-activating a dialer at the same time they disconnect it.

To connect or to connect/activate the Dialer:

1. In the **Navigation** menu go the the **Resources > Dialer** item.

   All currently available dialers are listed.

2. In the list, select the dialer or dialers you want to connect to.

3. Click the **Connect/Activate** button on the toolbar, or right-click the selection and choose **Connect/Activate** from the context menu that appears.

   The Connect/Activate dialog opens.

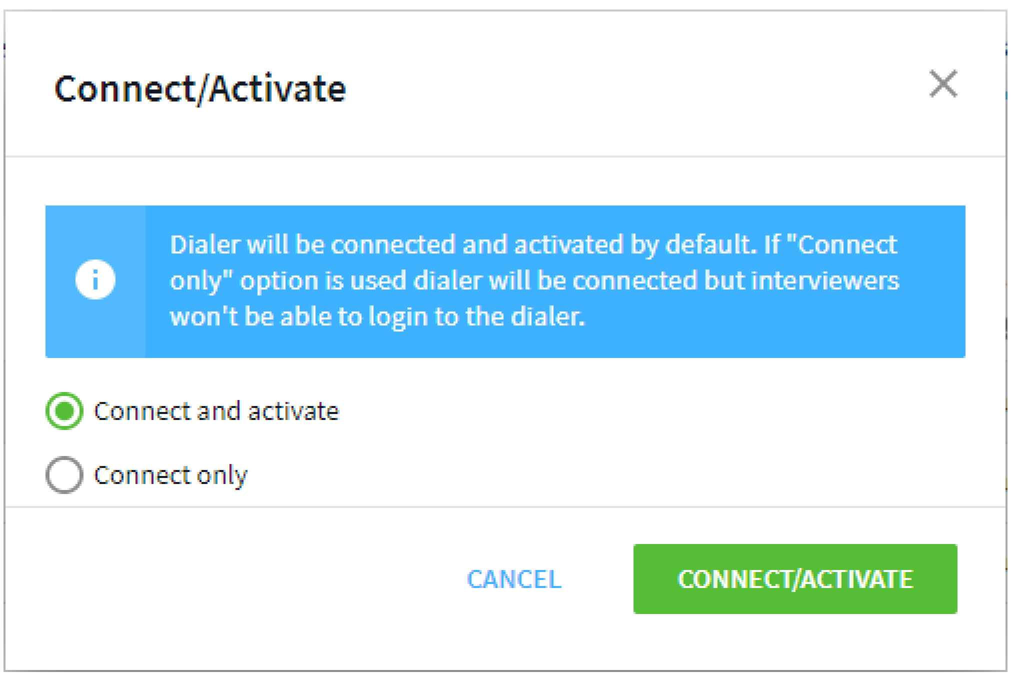


Figure 344 The Connect/Activate dialog

4. Choose whether you want to connect and activate the dialer or only connect to it.
5. Click **Connect/Activate** to start the procedure.

The Dialer list is refreshed. If the attempt is successful the dialer state (indicated in the State column) changes to "Dialer connected and activated". If the connection attempt fails the dialer state does not change and an error message is displayed informing you that the attempt has failed.

To disconnect or to disconnect/deactivate the dialer:

1. In the Dialer list select the dialer or dialers you want to disconnect from.
2. Click the **Disconnect/Deactivate** button on the toolbar, or right-click the selection and choose **Disconnect/Deactivate** from the context menu that appears.

   The Disconnect/Deactivate dialog opens.

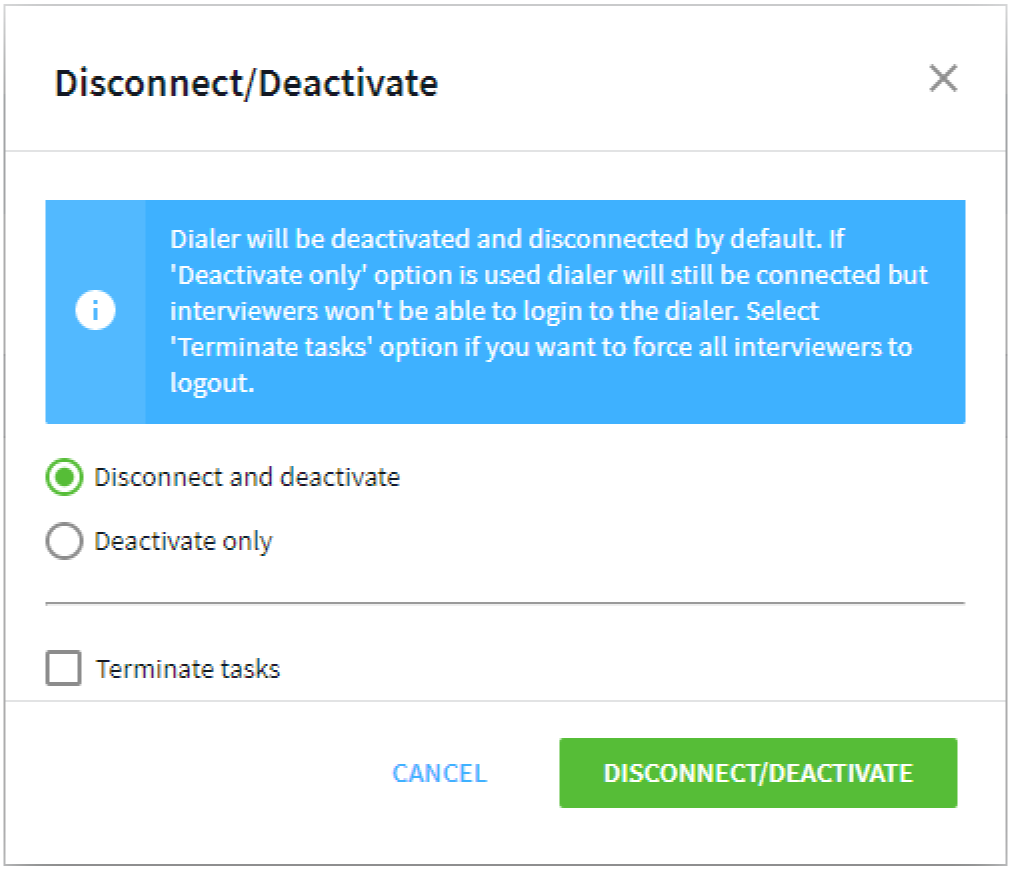


Figure 345 The Disconnect/Deactivate dialog

3. Choose whether you want to disconnect and deactivate the dialer or only to deactivate it.
4. If you want to force all interviewers currently working with this dialer to be logged out, select the **Terminate tasks** option.

   This option can be selected both when the Disconnect/Deactivate or only Deactivate option is chosen.
5. Click **Disconnect/Deactivate** to start the procedure.

   The Dialer list is refreshed. If the attempt was successful the dialer state (indicated in the State column) changes to "Dialer disconnected".

Configuring global dialer settings:

The set of dialer settings is different for different dialer types (TCI, Pro-T-S and other types). Below are listed the settings used with the TCI dialer type:

- **No reply timeout** - this is the timeout period (in seconds) that the dialer will wait until the call attempt is considered as a "no reply".
- **Telephone number prefix** - this is a string that is added to the start of every telephone number before it is dialed by the dialer. This prefix is not added to the telephone number stored in the survey data.
- **Email address for error notification** - email address(es) that should be informed in case the connection with the dialer is lost or the local dialer component is restarted. In such cases the dialer may need to be reinitialized and active interviewers may need to log back into the system. You can add a number of email addresses (divided by semicolon) in this field. The following requirements are applied to the email addresses entered in this field - the address should start with a letter or a number, the address should not start with an underscore or a dot, a dot can be used in the address name, the domain name can consist of several parts (subdomains are allowed), the top-level domain name should consist of 2 to 6 characters.

The following settings are available for the Pro-T-S type of dialers:

- **No reply timeout** - the number of rings that are to be performed by the dialer before the call attempt is considered a "no reply".
- **Nuisance call abandonment rate** - the value supplied controls the abandonment rate when dialing in full predictive mode, this parameter determines the rate at which connected calls will be dropped because an interviewer is not available. Valid values and their meaning are shown below:

  o0 - 1 in 10,000 (.01%)

  o5 - 5 in 1,000 (.5%)

  o10 - 10 in 1,000 (1%)

  o20 - 20 in 1,000 (2%)

  o30 - 30 in 1,000 (3%)

  o40 - 40 in 1,000 (4%)

  o50 - 50 in 1,000 (5%)

  o60 - 60 in 1,000 (6%)

  o70 - 70 in 1,000 (7%)

  o80 - 80 in 1,000 (8%)

  o90 - 90 in 1,000 (9%)

  o100 - 100 in 1,000 (10%)

- **Enable answer phone detection** - when enabled, the dialer will attempt to determine if the respondent's line has been answered with an answer phone. If the "reply" is considered to be an answer phone, the call will automatically be classified as an answer phone. Note that enabling answer phone detection may result in a short delay before voice is delivered to an interviewer in all call attempts.
- **Billing Code** - this optional parameter can be used to associate a billing code with a particular call. This option is typically used at the survey level. The value input can be used for dialer log file analysis for billing purposes.
- **Email address for error notification** - email address(es) that are to be notified in the event the connection with the dialer is lost or the local dialer component is restarted. In such cases the dialer may need to be reinitialized, and active interviewers may then need to log back into the system. You can add a number of email addresses (separated by semicolon) in this field. The following requirements are applied to the email addresses entered in this field: the address must start with a letter or a number, the address must not start with an underscore or a dot, a dot can be used in the address name, the domain name can consist of several parts (sub-domains are allowed), the top-level domain name must comprise 2 to 6 characters.

6. Enter the required value(s) in each field - note that all fields are optional.

7. On completion click the **Save** button to save the dialer settings.

8.3.2. Working Without a Dialer

Companies are not required to use dialers, and companies that normally use dialers may find that for some (for example technical) reason one is not available. Surveys can be conducted without using one and the only difference will be that the dialing tasks are carried out manually.

When a dialer is not available, the **Resources > Dialer** tab in the Navigation menu remains accessible and the dialer list is displayed when you go to this tab. However if you attempt to connect and activate a dialer, the system presents a warning explaining that the listed dialer cannot be connected and activated because telephony is not currently enabled.

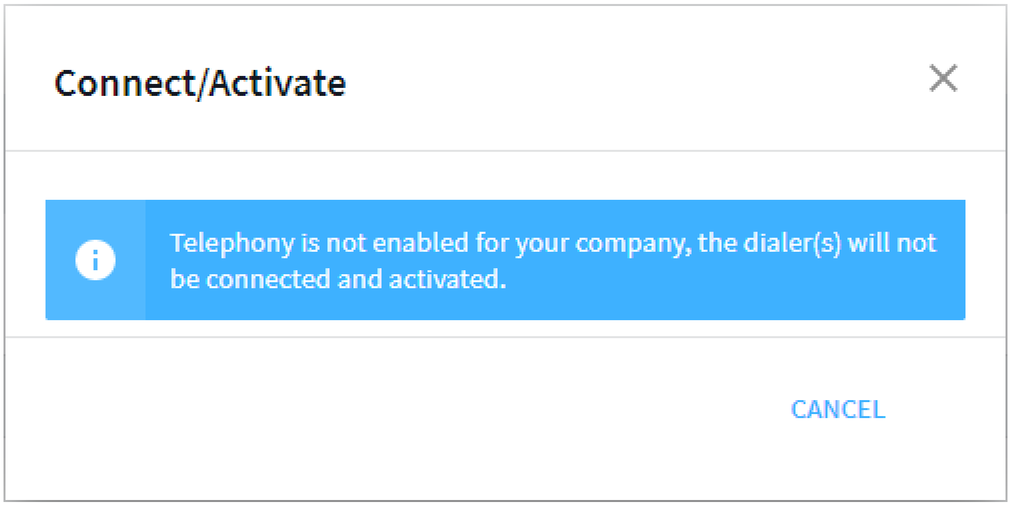


Figure 346 The Telephony is not enabled ... message

8.3.3. Dialing Mode

The Dialer operates in one of four basic dialing modes and one hybrid mode which is a combination of two of the basic modes. The dialing mode is specified as a CATI survey parameter in the survey authoring module. Refer to the user guide for the Forsta authoring application for details on this procedure. Once the dialing mode is specified for a survey, the dialer will only operate in this mode with this particular survey until the dialing mode is changed.

Note that "Dial mode"and "Interviewing mode" are different options. The dial mode is set up on the survey level in the authoring application, and it determines how the interviews are delivered to the interviewer. The interviewing mode is set up for each interviewer in the CATI Supervisor module, and this determines how the interviewer selects the surveys/interviews to be worked with (go to Selecting a Survey/Interview on page 252 for more information).

The following dialing modes are available:

- **Manual** - the dialer dials only the number for the interview that has been selected manually by the interviewer.
- **Preview** - the CATI Interviewer Console displays information for the interviewer which must be viewed before proceeding, and the Dialer dials the number for the interview only after the interviewer has confirmed that the interview can proceed.
- **Automatic** - the system delivers connected calls to the interviewer, one after another, in the order specified by the Interviewing mode.

- **Predictive** (available only with the Pro-T-S dialer) - this dialing mode was designed to increase the productivity of the interviewers by performing "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 a minimum. A dialer operating in this mode tracks and processes the call results, analyzes and compares the results and the interviewer's load pattern, and tries to "predict" based on the calculated statistics when the particular number should be dialed so that the interview can be delivered to an interviewer as soon as the previous interview is completed.
- **Hybrid** ("preview in predictive", and "preview in automatic") (available only with the Pro-T-S dialers) - this dialing mode allows efficiency and flexibility in calling rules. It allows a survey that is operating in predictive or automatic dialing to have specific calls allocated as 'to-be-preview-dialed' to ensure no nuisance dialing is performed on specific respondents. This enables the survey to run efficiently by dialing in predictive (or automatic) mode but once contact is made or once specific (arbitrary) criteria are met the respondent will no longer be called in predictive (or automatic) mode. This can reduce the risk of nuisance calls being made. In general this means that the survey is run in the predictive (or automatic) dialing mode, but when the interview marked as 'to-be-preview-dialed' is selected, the dialer is switched to the preview mode. After that interview's status is changed, the dialer switches back to the predictive mode, and the survey is then again run in the predictive mode until another marked interview is met.

The procedure for setting up the Hybrid dialing mode has some peculiarities. Unlike other dialing modes, the Hybrid dialing mode is set up in both the Forsta Authoring and the CATI Supervisor modules. The Hybrid dialing mode can be set up and will work only with surveys that have already been configured to run in the Predictive (or Automatic) dialing mode. Note that the Hybrid dialing mode is not available as the original dialing mode for a survey - this dialing mode is merely a way to use the Preview (or Automatic)mode instead of the Predictive only with certain interviews that are contained in a survey configured to run in the Predictive dialing mode.

There are three ways to set up the Hybrid mode for the survey.

Using the scheduling script:

This option is available for surveys that are originally set to the Predictive or Automatic mode.

1. In CATI Supervisor, add a special rule to the scheduling script that is used with this survey. The rule must be triggered by the extended status you select as a 'to-be-preview-dialed' mark. Any extended status of an interview can be used as this mark, for example you can specify that the dial mode is switched to Preview whenever an interview with the "Appointment" status is met. The rule must contain the "Set dialing mode" action, and the Action parameter value must switch the survey to the Preview dialing mode (go to Specifying Scheduling Script Rules on page 212 for more information)(go to Appendix A - Action Parameter Descriptions on page 458 for more information)
2. In the Forsta authoring application add a special algorithm to the survey. This must switch the survey to the Preview dialing mode whenever an interview marked as 'to-be-preview-dialed' is met. You can for example arrange this switch using an extra interview page that asks the interviewer to confirm switching to the Preview mode. Refer to the authoring application's documentation for information.

Using the sample:

This option is available for surveys that are originally set to the Predictive or Automatic mode.

1. When you prepare the respondent sample file for upload in the authoring application, specify the appropriate dialing mode value for each interview. This must be "2" for the Preview mode and "0" - for the original mode (Predictive or Automatic). No other actions must be performed in this case.

In the Call Management window:

This option is available only for surveys that are originally set to the Predictive mode.

1. Display the Call Management window for the survey which is set to the Predictive mode.
2. Set up the dialing mode for the interview (go to Setting Up the Preview Dialing Mode for an Interview on page 151 for more information). No other actions need to be performed in this case.

8.3.4. Dialing in the Single Survey TCPA Mode

The Telephone Consumer Protection Act (TCPA) protects mobile telephone users from unsolicited automated calls; it prohibits such calls to be made to cell phones. In CATI Supervisor terms this means that any kind of automatic dialing cannot be enabled for respondents who have only a mobile phone number associated with their sample record.

There are a number of ways to address the TCPA requirements with the Forsta Plus software, but this section focuses on a scenario that provides separate landline and cell phone handling from a single survey. This mode of operation will be referred to here as the "Single survey TCPA mode". As with all TCPA mitigation scenarios, numbers should be verified before being loaded into Forsta Plus. The benefit of the Single survey TCPA mode is that by using one survey quota management and data analysis will be much simpler.

The Single survey TCPA mode in CATI Supervisor works in the following way. Any interviewer can be assigned a dial type which is selected from two possible options – either “Landline”, or “Cellphone”. The “Landline” option instructs the CATI Supervisor module to deliver to this interviewer only interviews associated with the landline phone numbers. In this case automatic number dialing becomes possible for this interviewer. The “Cellphone” option tells the CATI Supervisor module to deliver to this interviewer only interviews associated with the mobile phone numbers. In this case only manual number dialing is allowed for this interviewer (go to Adding and Deleting an Interviewer on page 27 for more information).

Note: Single survey TCPA mode is disabled by default. Contact Forsta support if you want to have it enabled.

The dial type for each interview is specified in the sample file which contains the respondent records and is created in (or uploaded to) the authoring module. Dial type can be specified for each sample record using of the “DialType” system background variable - refer to the appropriate authoring manual for descriptions of the sample file format. The “DialType” background variable can have two values. While both values allow manual dialling, **0** is for for landline phone numbers and allows automatic dialing for this sample record, and **1** is for cell phone numbers and prohibits automatic dialing for this sample record. Each interviewer is assigned a specific Dial Type.

A supervisor can change the dial type for each interviewer at any time. To do this, edit the interviewer's properties (go to Viewing and Modifying the Interviewer Properties on page 38 for more information) and select the required Dial Type.

The supervisor can check which dial type was or will be used with any particular call in the Call Management window. The Dial Type column indicates which dial type is assigned (go to Viewing the Interview/Call List on page 118 for more information).

The Interviewer Activity View has a filter which allows you to select which interviewers are displayed in the View. Select “Landline”, “Cellphone” or all interviewers (go to Monitoring Interviewers and their Work on page 303 for more information).

The “DialType” background variable can also be used in scripting. Refer to the Forsta Scripting manual for details.

8.3.5. Adding a Dialer

A supervisor with System Administrator permission can add a dialer to the system.

To add a dialer to the system:

1. Go to the **Resources > Dialer** tab.
2. In the right frame toolbar choose the **Add dialer** button, or right-click any row in the list of dialers in the top frame and choose **Add** from the context menu.

   The Add Dialer dialog opens.

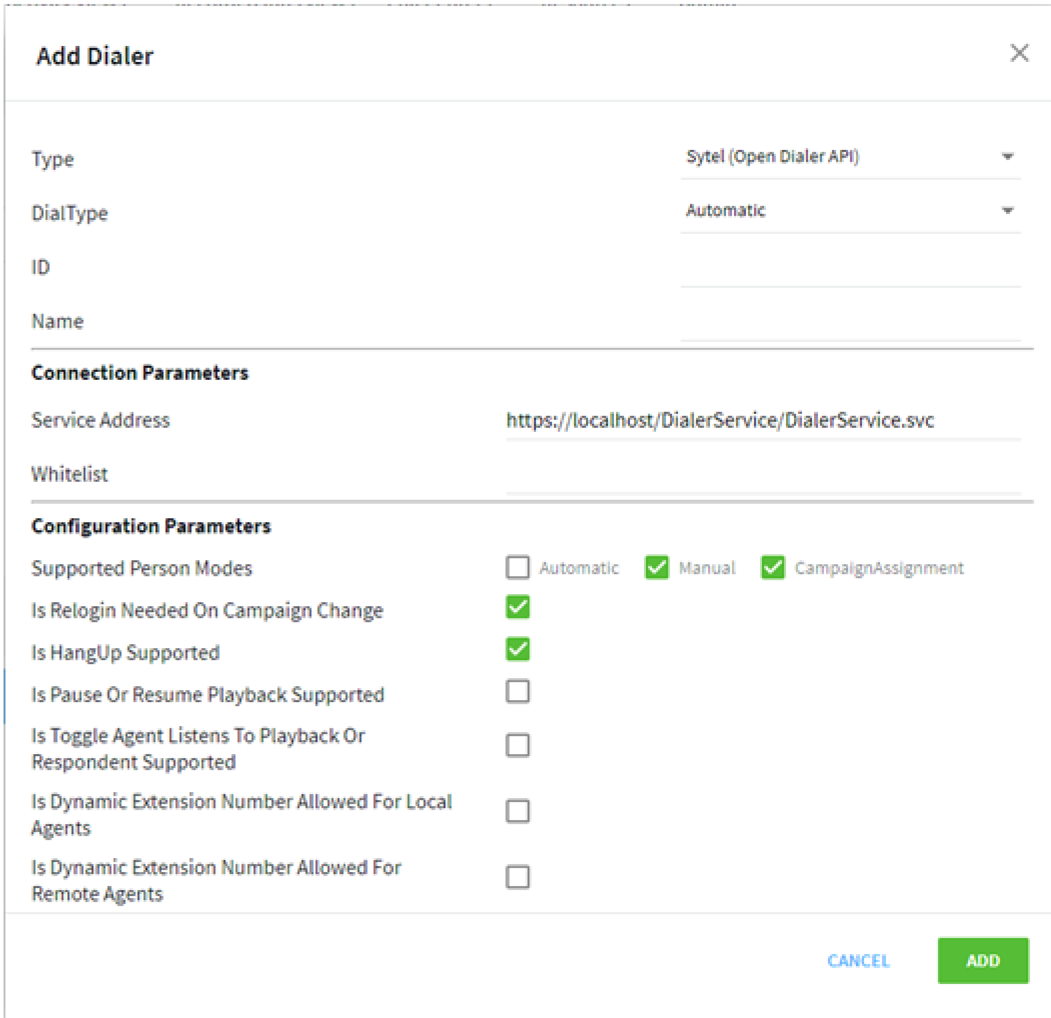


Figure 347 The Add Dialer dialog

3. Choose the type of the dialer in the Type field. Note that if multiple dialers are to be used with the system they must all be of the same type.
4. Choose the dial type from the DialType drop-down list. Note that the "Manual" type can be used for dialing mobile phone numbers.
5. Next enter an ID (any unique combination of digits) and a Name.
6. The Connection Parameters and Configuration Parameters sections contain parameters managed by a system administrator. Contact your system administrator if you have questions concerning these parameters.
7. On completion click **Add**.

   The CATI system checks the settings for validity, and assuming all is acceptable the dialer is added to the dialer list. If not, the system displays an appropriate warning message. Correct the error and try again.

8.3.6. Editing a Dialer

A supervisor with System Administrator permission set can edit properties of any dialer that is used with the system. Note that before making any changes to the dialer settings you must first disconnect and deactivate the dialer and, after the changes are saved, connect and activate it again (go to To disconnect or to disconnect/deactivate the dialer: on page 353 for more information).

To edit a dialer:

1. In the Resources section go to the Dialer tab.

   When the dialer state indicates the dialer is "Disconnected and deactivated" you can proceed with editing.

2. In the right frame select the dialer you wish to edit and click the **Edit dialer** button on the frame toolbar. Alternatively you can right-click the required dialer settings in the list and choose **Edit** from the context menu.

   The Edit Dialer dialog opens.

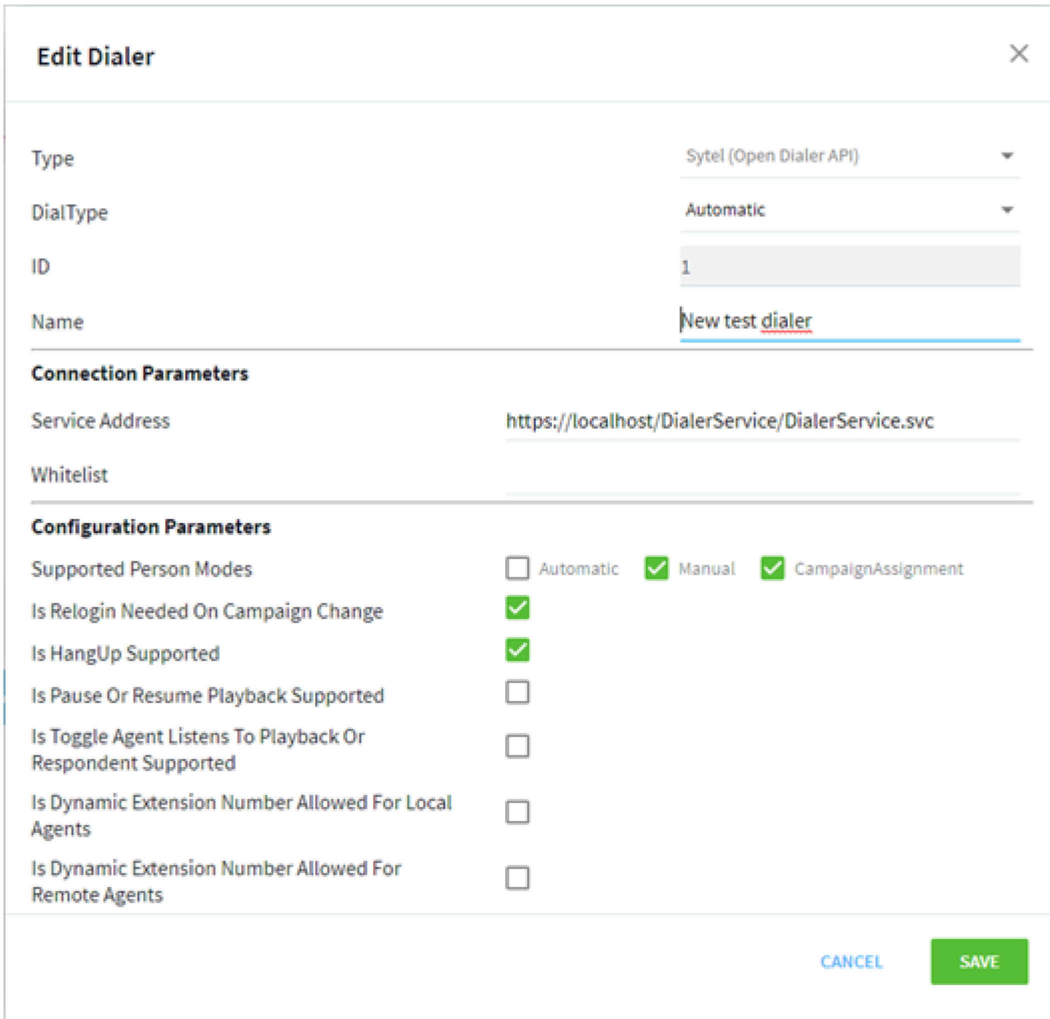


Figure 348 The Edit Dialer dialog

   The dialog shows the current dialer parameters. You should be familiar with the dialer's features before introducing changes to these settings.

3. Edit the settings as required.

4. On completion click **Save**.

   The CATI system checks the settings for validity, and assuming everything is correct the dialer is added to the dialer list. If not an appropriate message is displayed. Correct any errors and save again.

8.3.7. Deleting a Dialer

A supervisor with System Administrator permission set can delete any dialer shown on the Dialer tab. Prior to deleting a dialer the supervisor should disconnect and deactivate it.

To delete a dialer from the system:

1. Ensure the dialer is disconnected and deactivated (go to To disconnect or to disconnect/deactivate the dialer: on page 353 for more information).

   When the dialer state is indicated in the list as "Disconnected and deactivated" you can proceed with deletion.

2. Select the dialer you want to delete and click the **Delete dialer** button on the toolbar. Alternatively you can right-click the required dialer in the dialer list and choose **Delete** from the context menu.

   A confirmation message opens.

3. Confirm the deletion to remove the dialer from the system.

8.3.8. Viewing Dialer Logs

The CATI system logs dialer events and stores them. A supervisor with the System Administrator permission set can view the log for any dialer currently used in the system.

To view a dialer log:

1. In the Resources section go to the Dialer tab.

2. Either click the **View dialer logs** button on the right frame toolbar, or right-click anywhere in the grid with the list of dialers and choose **View dialer logs** from the context menu.

   The View Dialer Logs window opens.

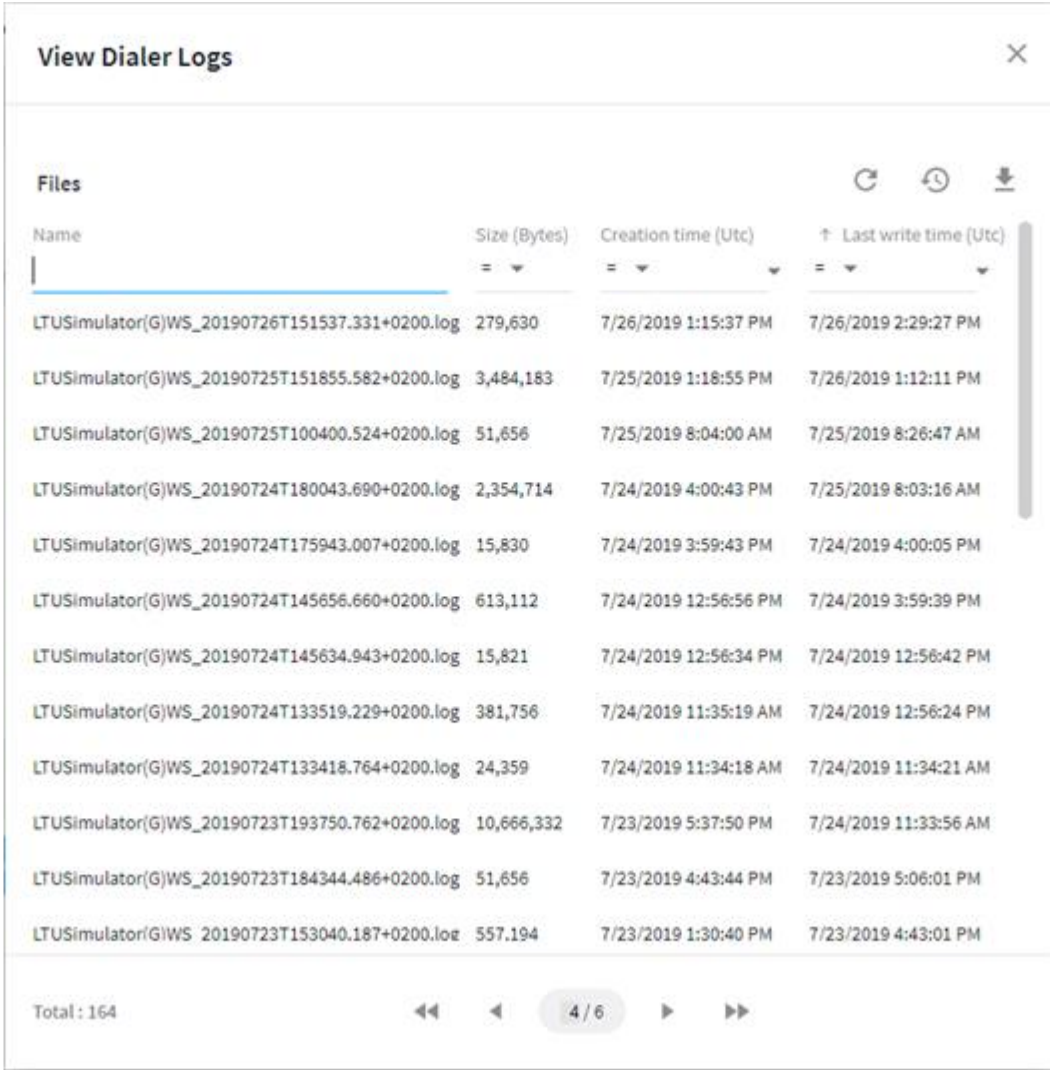


Figure 349 Example of the View Dialer Logs window

The list presents the following information:

- **Name -** the name of the log file to which the data was saved. The name is composed of the dialer name, log file creation time and timezone difference;
- **Size -** size of the log file in bytes;
- **Creation time -** time when the log file was created (UTC timezone);
- **Last write time -** time of the last recorded entry.

3. Select the required log file in the list and click the **Download log file** button in the window toolbar, or right-click the row with the required file name and choose **Download log file** from the context menu.

   The log file is downloaded into a location specified for browser downloads. This is a zipped text file in ASCII format.

4. To refresh the dialer log file list click the **Refresh** button on the window toolbar.

8.4. Configuring the Break Classification

By default the system captures all break timing under a single break classification. However the CATI Supervisor module allows you to set up custom break classifications from within the Resources/Break Classifications tab. This means that all of the common reasons for taking a break can be formalized and listed as classification types, which will allow interviewers' break time to be calculated separately for the respective break types. When defining custom classifications, each break type should be specified as either a paid or unpaid break. Each time the interviewer takes a break and they click the break button in the CATI Interviewer Console, they will be prompted to choose the appropriate classification (go to Taking a Break on page 270 for more information). The supervisor can add new break classifications at any time, or edit/delete any existing break types.

Break types are presented with the following information:

- **ID -** ID of a break.
- **Name -** break name.
- **Description -** optional description of the break. It is displayed as a tool tip when the interviewer hovers the mouse over the break name in the **Take Break** menu in the CATI Interviewers Console.
- **Type -** type of break: can be either Paid or Unpaid.

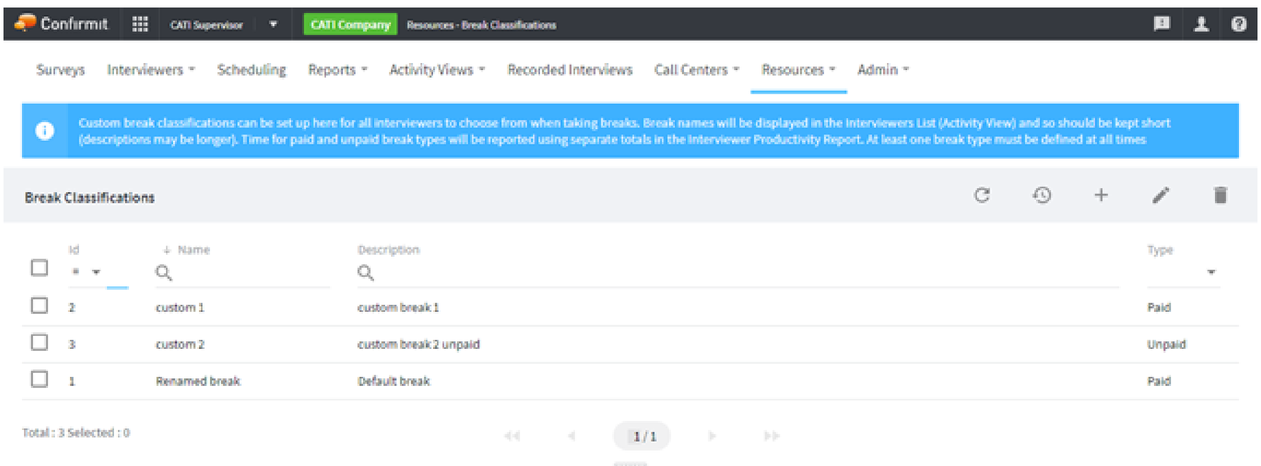


Figure 350 The Break Classifications list

Totals for the paid and unpaid break timings are calculated and presented separately in the Interviewer Productivity report (go to Generating the Interviewer Productivity Report on page 404 for more information)

The timings of breaks against the respective classifications can be viewed by exporting the call history data, either manually by right clicking on a survey and choosing **Call History Export** or automatically by using the CATI REST based API.

Note that if a break type is deleted from the Break Classification list, all records for that deleted type will be counted as the "paid" type regardless of what type of break has been deleted.

To add a break type:

1. In the Navigation menu go to the Resources tab and choose **Break Classifications** from the drop-down list.

   The Break Classification list opens.

2. Click the **Add** button  in the toolbar or right-click any row in the grid and choose **Add** from the shortcut menu.

   The Add Break Classification dialog opens.

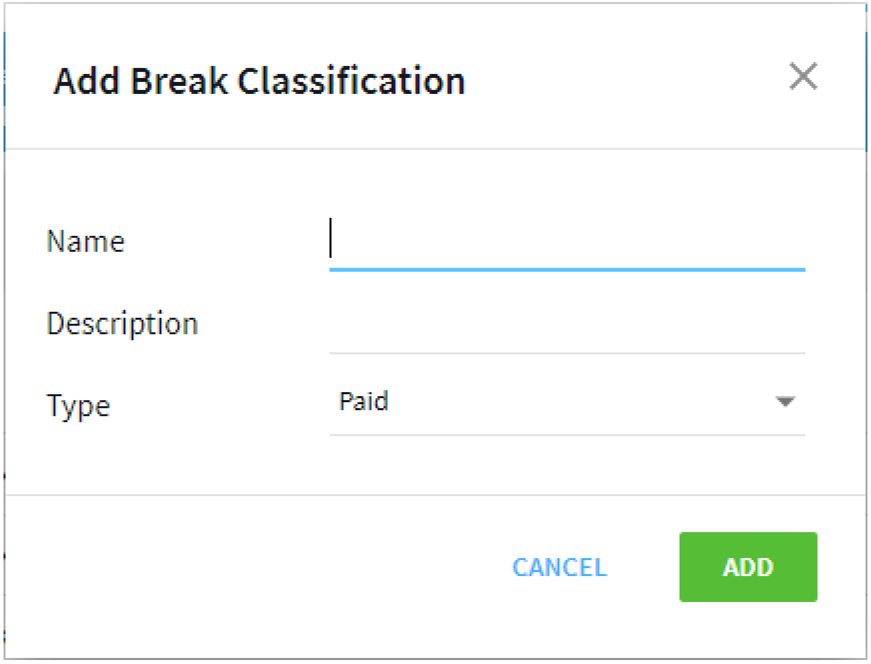


Figure 351 The Add Break Classification dialog

3. Enter the required information.

   It is recommended to keep break names short as these names are displayed in the break selection menu in the CATI Interviewers Console and also in the "Login" column of the interviewers list activity view, locations where horizontal space is limited. If necessary consider using acronyms to shorten break names and then provide longer descriptions in the description field. The interviewer can then learn more about the various options by hovering the mouse over them in the break selection menu.

4. On completion click **Add**.

   A new break type is added to the Break Classification list.

To edit a break type:

1. In the Navigation menu go to the Resources tab and choose **Break Classifications** from the drop-down list.
2. Choose a break type in the list then click the **Edit** button in the frame toolbar, or right-click a row in the list and choose the **Edit** command from the shortcut menu

   The Edit Break Classification dialog opens.

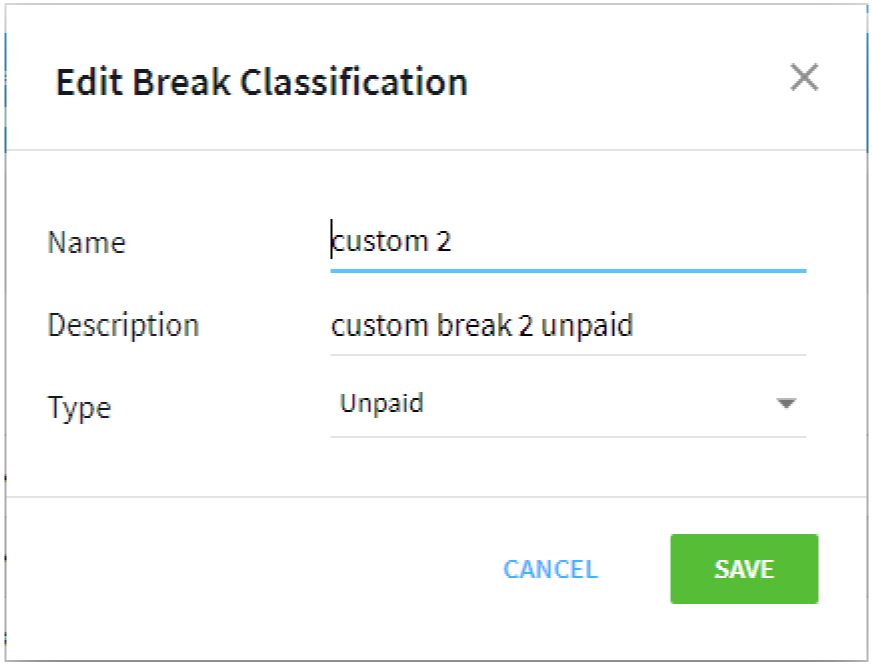


Figure 352 The Edit Break Classification dialog

3. Enter the required information.

   It is recommended to keep break names short as these names are displayed in the **Take Break** menu in the CATI Interviewers Console and also in the "Login" column of the interviewers list activity view, locations where horizontal space is limited.

4. On completion click **Save**.

   The break type information is updated in the Break Classification list.

To delete a break type:

1. On the Resources tab go to **Break Classifications**.

   The Break Classification list opens.

2. Choose a break type in the list then click the **Delete** button in the toolbar, or right-click a row in the list and choose **Delete** from the shortcut menu that appears.

   A message is presented informing you that if a break type is deleted from the Break Classification list, all records for that deleted type will be counted as the "paid" type regardless of what type of break has been deleted.

3. Click **Delete** to complete the deletion.

   The break type is deleted from the list.

8.5. Configuring Inbound Call Settings

Note that the feature described in this topic is only available if the Inbound Call processing add-on is enabled for your company.

The supervisor can register telephone numbers that will be used to receive respondent calls for inbound or "blended" surveys. Such telephone numbers are called DDI (or "Direct Dial-In") numbers. The list of DDI numbers is maintained on the "Inbound settings" tab of the Resources item of the navigation menu.

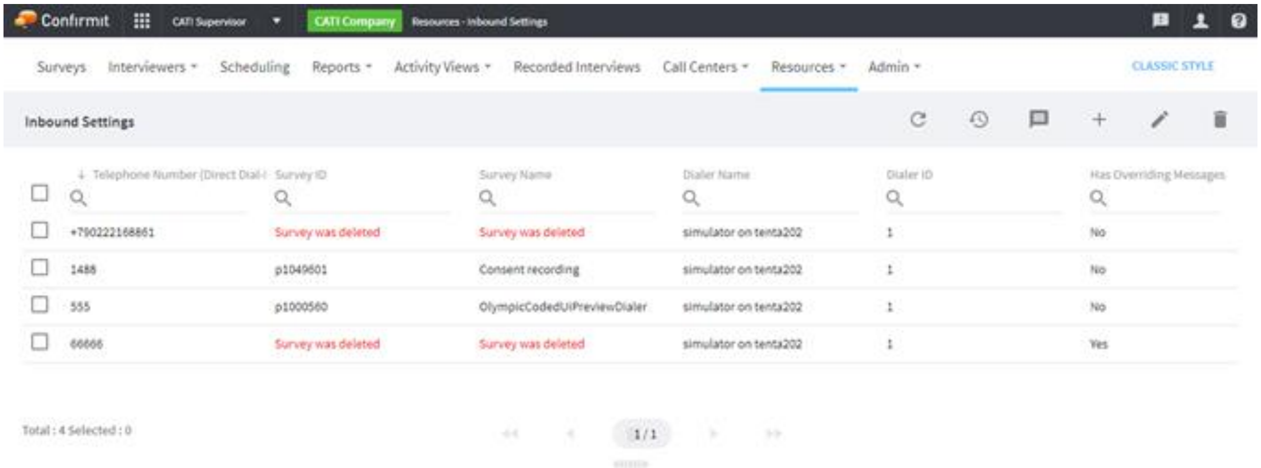


Figure 353 Example of a list of DDI numbers

A DDI telephone number can be configured to work with a unique pair of a survey and a dialer, otherwise there are no restrictions in configuring a DDI number.

The DDI number list provides the following information presented in columns:

- **Telephone number** - this is the DDI number.
- **Survey ID** - this is the ID of the survey this DDI number is associated with.
- **Survey name** - this is the name of the survey this DDI number is associated with.
- **Dialer name** - this is the name of the dialer which will be used to handle calls for this DDI number.
- **Dialer ID** - this is the ID of the dialer which will be used to handle calls for this DDI number.
- **Has Overriding Messages** - indicates that on-hold messages exist that have been added specifically for this DDI number (go to On-hold Messages Played to Calling Respondents on page 369 for more information).

You can perform the following operations with the list items:

- Add a DDI number to the list.
- Edit information related to a DDI number currently on the list.
- Add overriding on-hold messages for a selected DDI number. These messages will be played instead of those specified as "Default" in the Default On-Hold Messages list.
- Delete a DDI number from the list.

In addition, you can configure messages that will be played to a respondent when the system starts to process their call. As in most cases the respondent is not guaranteed an immediate contact with the interviewer, and a situation is possible when no-one can answer this call, the CATI system provides a number of "On-hold" messages that inform the calling respondent how long they have to wait for an answer, or whether they have to call again later (go to On-hold Messages Played to Calling Respondents on page 369 for more information).

To add a DDI number:

1. Click the **Add DDI number** button + in the frame toolbar, or right-click any row in the table that contains information and choose **Add DDI number** from the context menu.

   The Add DDI Number dialog opens.

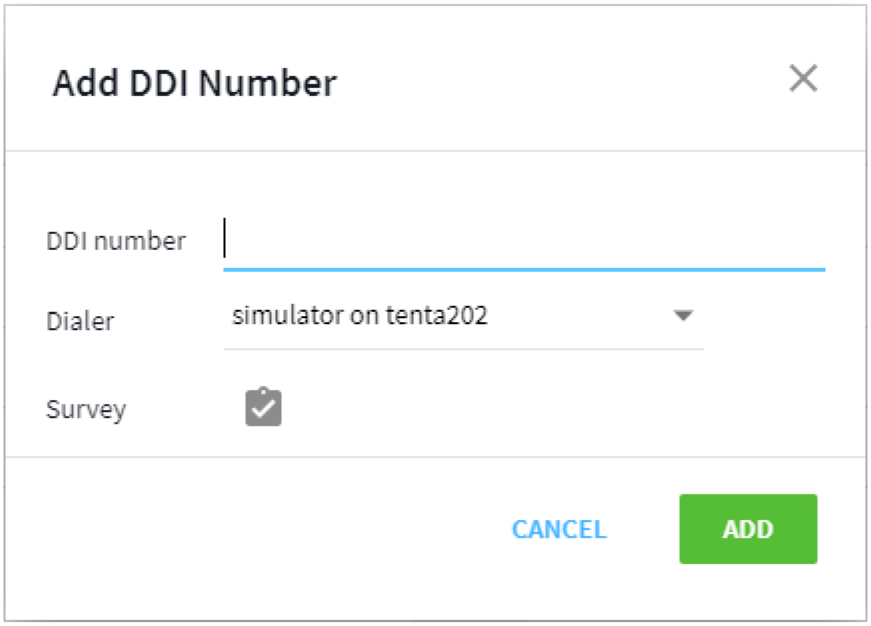


Figure 354 Adding DDI numbers to the list

2. Enter the DDI number in the DDI number field, then choose a dialer from those available for your company.
3. To choose an inbound survey, click the **Select Survey** button  to display the Add Survey dialog (go to The Select Survey dialog on page 79 for more information).
4. Click the **Add** button.

   The Add DDI number dialog closes and the selected parameters are displayed as a row in the top frame.

To edit information related to a DDI number currently on the list:

1. Select from the list of DDI numbers the DDI number you wish to edit.
2. Click the **Edit DDI number** button  in the frame toolbar, or right-click the selected row and choose **Edit DDI number** from the context menu.

   The Edit DDI number dialog opens.

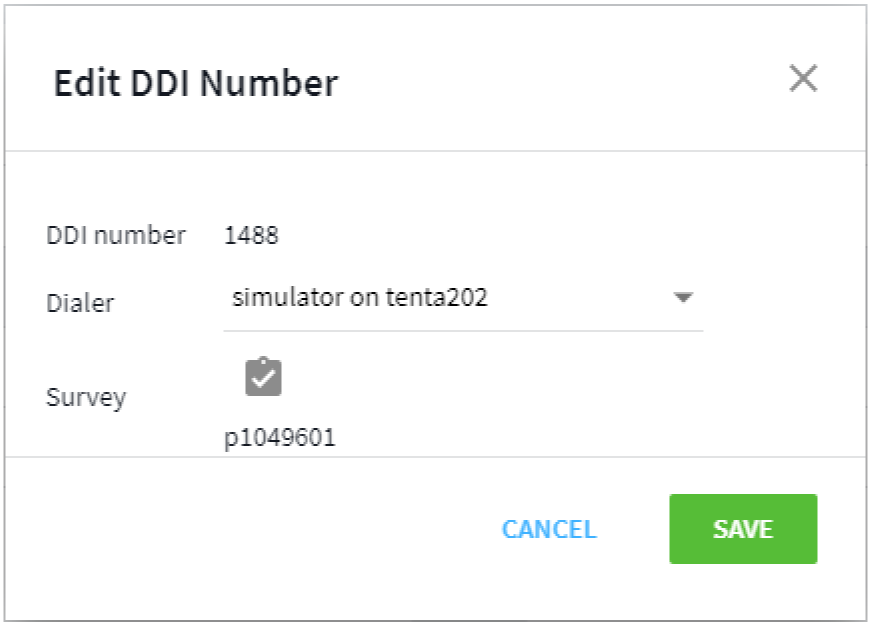


Figure 355 Editing information related to a DDI number currently on the list

You cannot edit the DDI number itself

3. Choose another dialer as necessary from the Dialer drop-down list.
4. Click the **Select Survey** button to choose another survey to associate with this DDI number.
5. On completion click **Save**.

To delete information related to a DDI number currently on the list:

1. Select from the list of DDI numbers the DDI number you wish to edit.
2. Click the **Delete DDI number** button in the frame toolbar, or right-click the selected row and choose **Delete DDI number** from the context menu.

   A prompt is displayed asking you to confirm the deletion.
3. Click **OK** to delete the selected DDI numbers.

Managing DDI-specific recorded messages:

When required, you can add a set of "overriding" on-hold messages to be played to respondents who call a specific DDI number.

1. Right-click the required DDI number in the list and choose **Manage DDI specific recorded messages** from the context menu.

   The list of On-Hold Messages is displayed (go to Configuring the Overriding On-hold Messages on page 371 for more information).

8.5.1. General Procedure for Handling an Inbound Call

The CATI Supervisor module is able to handle inbound calls when it is connected to an integrated dialer which supports inbound call processing technology.

Inbound call processing relies on the DDI (Direct Dial-In) number list and also on a scheduling script which is dedicated to handling inbound calls. Such a script may involve specific functions and methods used in the Dialer API to handle inbound calls.

The work of a dialer also has to be configured. However, most of the dialer's functionality is handled in the background and the supervisor is usually not required to touch any of these parameters.

An inbound call can be handled by the CATI system after the system is prepared in the way described below. Procedures and settings described in the present chapter encompass only items that are configurable with the use of the CATI Supervisor UI. There are other aspects which are configured by a system administrator.

Prerequisites, or what should be set up before the CATI system is able to handle inbound calls.

- Supervisor should make sure that respondent records in the sample contain telephone numbers in a dedicated field (using the standard system field named 'TelephoneNumber'). These telephone numbers will be used when the system searches for a record corresponding to an incoming call;
- DDI numbers should be configured - inbound calls will only be accepted if they are coming to these numbers. Each DDI number is associated with one survey. See (go to Configuring Inbound Call Settings on page 364 for more information) for information regarding DDI numbers and related settings.
- For each company a set of "On-hold" messages should be configured - these messages are played to a calling respondent in certain situations to explain to them what's what’s happening whilst waiting for a call to be connected. . See (go to On-hold Messages Played to Calling Respondents on page 369 for more information).
- A special scheduling script should be added to the system. This script is used for accepting inbound calls.

  After an inbound call is passed to an interviewer it is processed as a regular "outbound" call.

Identifying a call

When an inbound call comes to one of the specified DDI numbers the CATI system starts looking for a survey which is associated with this DDI number. When the survey is found, the CATI system attempts to read the Caller ID (the phone number from which the call is detected). When the Caller ID (or CLI) is read, the system starts looking for a record that has this survey and this identified telephone number associated with it. Based on the survey and the identified telephone number of the respondent the CATI system looks up a suitable record to create a call.

Choosing a suitable record

When a CLI is identified, the system will find a corresponding survey record and create a call for this record. Note that different situations may arise as in some cases the Caller ID may not be identified. If a CLI is unknown then depending on how it is configured the system may:

- Create a new interview record automatically.
- Drop the call.

Scheduling script for handling inbound calls

When a call is created, the system runs a scheduling script to process the inbound calls. This script should be created beforehand and should contain the "Accept Inbound Call" action. Other parameters for this script are optional.

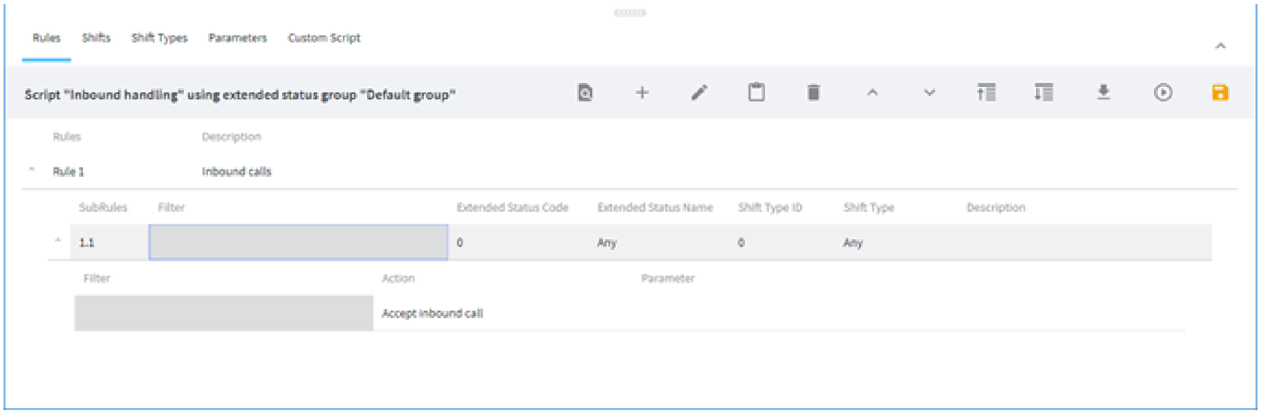


Figure 356 Example of a scheduling script for handling inbound calls

Calls have a property called the "CLI Number". This is an identified telephone number from which the inbound call comes, and it can be used in scheduling scripts to filter calls.

A scheduling script for accepting inbound calls can contain other rules and actions which help in processing an inbound call.

It is recommended to use the "Increment priority" action for inbound calls to forcibly increase the Priority value so that the call can be delivered to an interviewer as quickly as possible. This is especially important when calls are delivered in the "non-Predictive" mode.

Delivering a call to an interviewer

When a record is found and an interview is created, the system starts searching for an interviewer to conduct this interview. Depending on the dial mode used for this survey the system delivers a call in the following manner:

- For a Predictive mode it puts a call in the queue, and it will then be delivered to an interviewer as a regular "outbound" call.
- For a "non-Predictive" mode the system uses a special method to tell the dialer that this is an inbound call (having a higher priority than "outbound" calls) and it should be delivered prior to other calls.

After an inbound call is connected to an interviewer it is processed in a similar way to an outbound call.

The Interviewer is always informed when an inbound call is delivered to them - the Interviewer Console toolbar turns green and an icon starts to flash towards the right end (go to Inbound call handling on page 264 for more information).

Note that all situations when the inbound caller must wait for their call to be connected, or the call is dropped, are explained in the audio messages that are played to the caller immediately the situation arises (go to On-hold Messages Played to Calling Respondents on page 369 for more information).

Using a scheduling script to route inbound calls

The CATI system allows you to set up a filter for a scheduling rule action that can route inbound calls (go to Inbound Call Support using Scheduling Script on page 229 for more information). For further details refer also to the CATI Administartor Manual.

Note that normally an inbound call is allowed outside of the permitted shift. It will be accepted if there is at least one interviewer available.

8.5.2. On-hold Messages Played to Calling Respondents

When a respondent attempts to call an interviewer, in most cases the calling respondent is not guaranteed immediate contact with the interviewer and a situation can arise when no-one is available to answer the cal. The CATI system therefore provides a set of "On-hold" messages to inform the respondent roughly how long they must wait for an answer, or whether they should call again later.

This is a company-wide setting. The CATI Supervisor supports playing back audio files in MP3 format. All messages (audio files) are played a specified number of times, and if a field in the setup page is left blank then no message will be played.

If necessary the supervisor can add and configure a set of on-hold messages that will replace the default messages for a selected DDI number.

Configuring the Default On-hold Messages:

1. Go to the Resources tab and choose **Inbound Settings**.
2. Select the DDI number you want to configure and click the **Manage Recorded Messages** button  on the toolbar in the right frame.

   The Default On-hold Messages list opens.

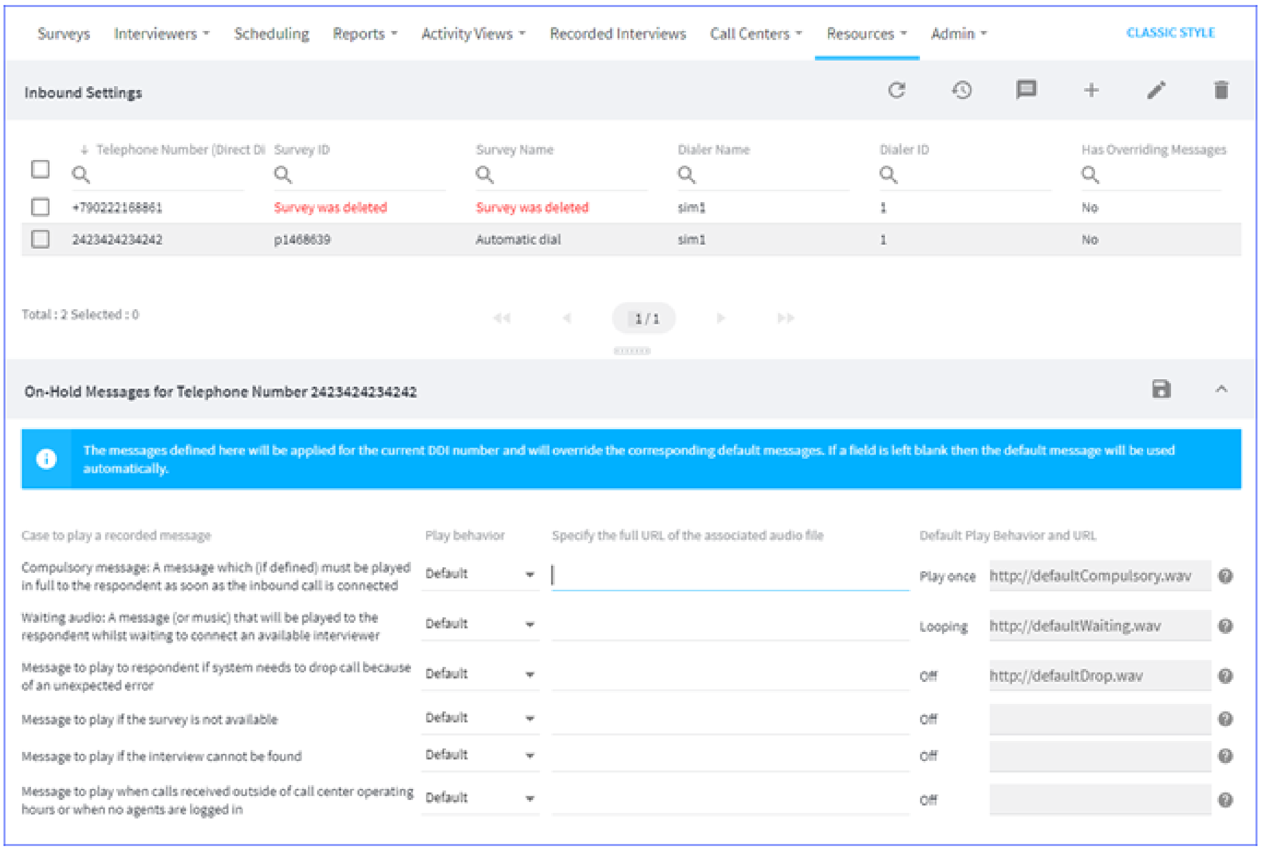


Figure 357 The Default On-hold Messages list

The following messages can be set up to play on reception of an inbound call:

- **Compulsory message -** A message which (if defined) will be played to the respondent as soon as the inbound call is connected. This message (if supplied and set to play) is always played once and in full to the respondent immediately the dialer accepts the incoming call. The respondent has no way to interrupt or skip the message. After the message has finished playing, the system will start to play the 'Waiting audio' (see below). For example: "Note that the interview may be recorded for our quality control process".

- **Waiting audio -** A message or music that will be played to the respondent while they are waiting to be connected to an available interviewer. This message will continue to play while there are no agents available to pick up the call, and it stops playing as soon as the system connects an agent to the call. If a compulsory message is defined then the waiting audio will only start after this message has been played. If no compulsory message is defined, the 'waiting audio' may be played first.
- Message to play to the respondent if the system needs to drop the call due to an unexpected error.
- Message to play if the survey is not available due to:
    - The survey is closed. Note that repetitive playback of a recorded message is only possible if the dialing system supports it.
    - The survey was deleted.
- Message to play if the interview cannot be found. This message is played when the inbound caller has an unknown or unspecified caller ID and a new interview must be started due to the situation. It is assumed that after the message is played an available agent can be connected who will then ask some questions to locate the appropriate survey and record. If this functionality is not enabled the system will play this message for any case where the caller ID cannot be found and matched to the applicable survey and interview record (this includes the case where the caller ID is withheld/empty).
- Message to play when a call is received outside of call center operating hours - this message is played if a caller ID is recognized but the call cannot be answered because the call center is closed at the time of the call. The availability status for the call center is based upon the permitted shift times (as defined in the schedule/shifts tab for the applicable survey schedule) and the current time for the call center is based on the default time zone setting (as specified under Resources/Active Timezone list).

3. All fields in the "Default On-hold Messages" form accept URLs pointing to a particular Audio file.
4. By default all messages are played once. If the dialing system supports multiple repetition of audio file playback, the Supervisor can configure each message to be played a desired number of times sequentially (to ensure the caller clearly understands the message). To that end the supervisor should choose a value from a corresponding Repeat Count drop-down list. This setting affects only the selected message.
5. Click the Save button on the bottom right frame toolbar to save the On-Hold Messages settings after all changes have been made.
6. Parameters of each configured default On-Hold Message can be edited later. To edit parameters select a message in the list and click the Edit DDI Number button on the toolbar. This will display the parameters in the bottom frame. Follow the instructions described in the steps

Configuring the Overriding On-hold Messages

When required, the supervisor can replace existing on-hold messages with messages of his own choice. This can be done separately for each DDI number from the list displayed in the top right frame.

1. Right-click the desired DDI number in the list in the top right frame and choose **Manage DDI specific recorded messages** from the context menu.

   An extended On-Hold Messages dialog opens. The frame's title bar indicates that this dialog is specific for the selected DDI number only. In addition to a set of regular parameters it contains a set of similar parameters which can be set up independently of the default ones.

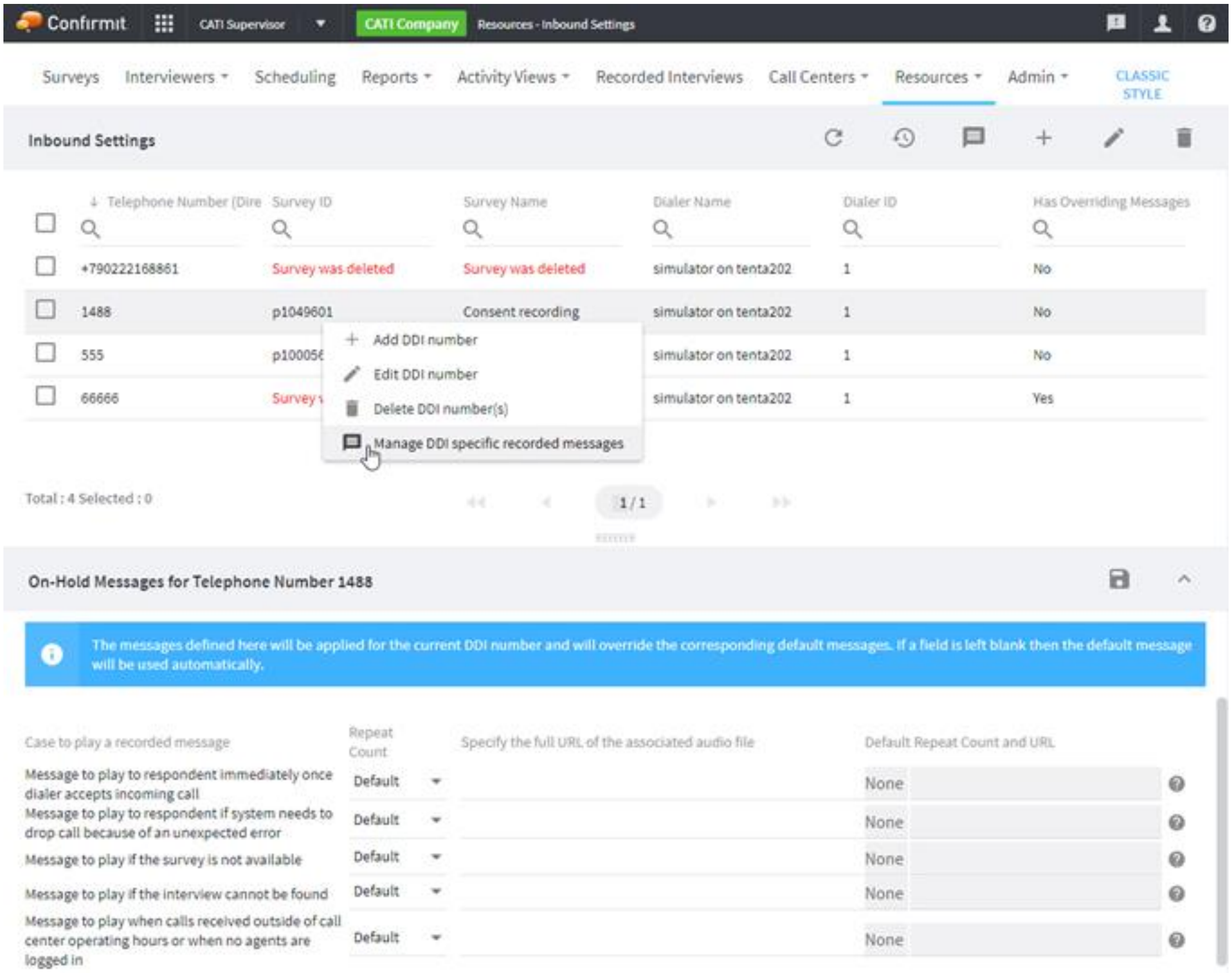


Figure 358 Configuring a DDI-specific set of On-Hold Messages

2. The grayed-out messages on the right side of the frame are the default set; edit the set on the left (go to Configuring the Default On-hold Messages: on page 370 for more information).
3. When choosing the number of repeats from the Repeat Count drop-down list you can select the "Default" value. This means that an overriding message will be played back the number of times specified for the default message. Repetitive playback of a recorded message is only possible if the dialing system supports it.

   If a file name for an overriding on-hold message is left empty, the default message will be played.
4. On completion click the **Save** button  on the frame toolbar.

8.6. Configuring the IVR Settings

The IVR functionality in the CATI Supervisor module allows interviews to be conducting completely or partially without human interaction. The interface allows you to manage the IVR interviewing mode settings, and specify multilingual messages, both on-screen and audio, that will be presented to a respondent in the event they make a mistake while answering interview questions. The list of available IVR Settings is displayed in the upper frame and the General IVR Settings, which provide control over technical details, are displayed in the lower frame. These are applied to all language settings shown in the upper frame.

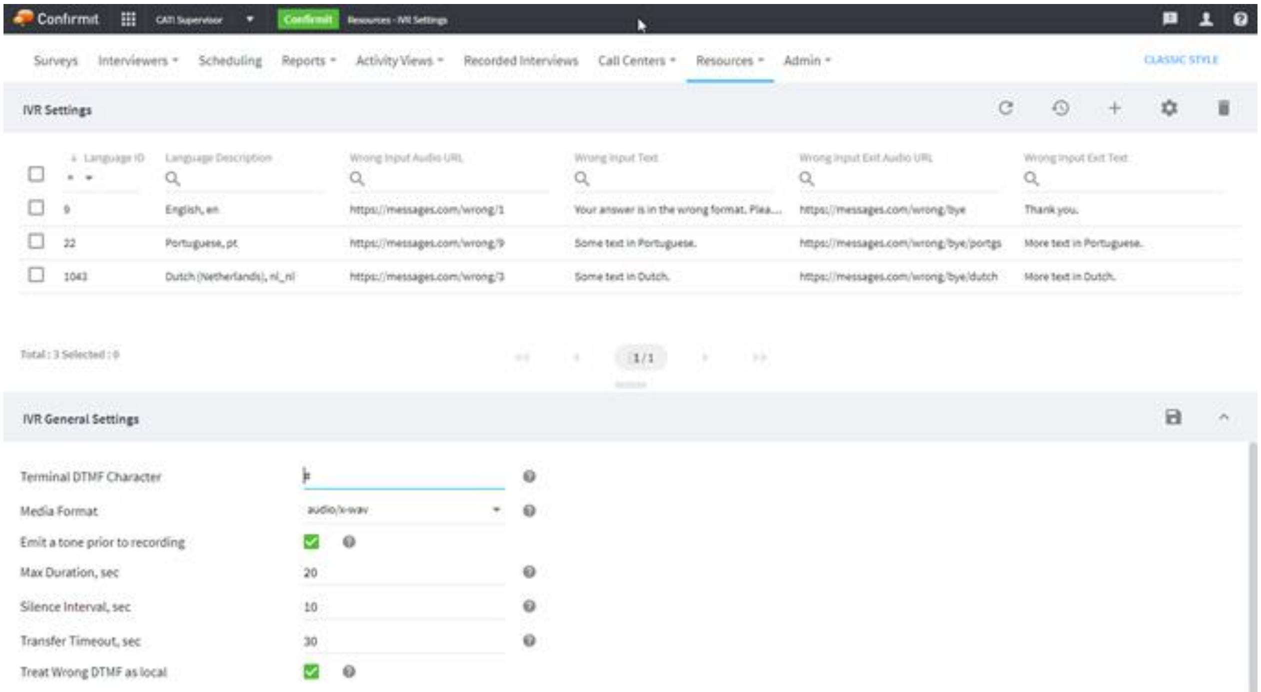


Figure 359 Resources - the IVR Settings tab

To set up multilingual messages for respondents, first prepare the text and audio files containing these messages. The message texts and the paths to the audio files can then be entered into the appropriate columns in the upper frame.

The list provides the following information:

- **Language ID -** the ID of this language used in the CATI System.
- **Language description -** the name of the language.
- **Wrong Input Audio URL -** URL of an audio file containing related warning message.
- **Wrong Input Text -** related warning message text.
- **Wrong Input Exit Audio URL -** URL of an audio file containing related warning message.
- **Wrong Input Exit Text -** related warning message text.

You can add, edit or delete existing language IVR Settings and edit the IVR General Settings at any time.

To add an IVR setting:

1. Go to the **Resources** tab, then choose **IVR Settings**.

   The IVR settings (if any) are displayed. If no IVR settings have been added, the list will appear empty.

2. To add a number to the blacklist click the **Add IVR Settings** button on the toolbar, or right-click anywhere inside the grid in the top right frame and choose **Add IVR Settings** from the context menu.

   The Add IVR Settings dialog opens.

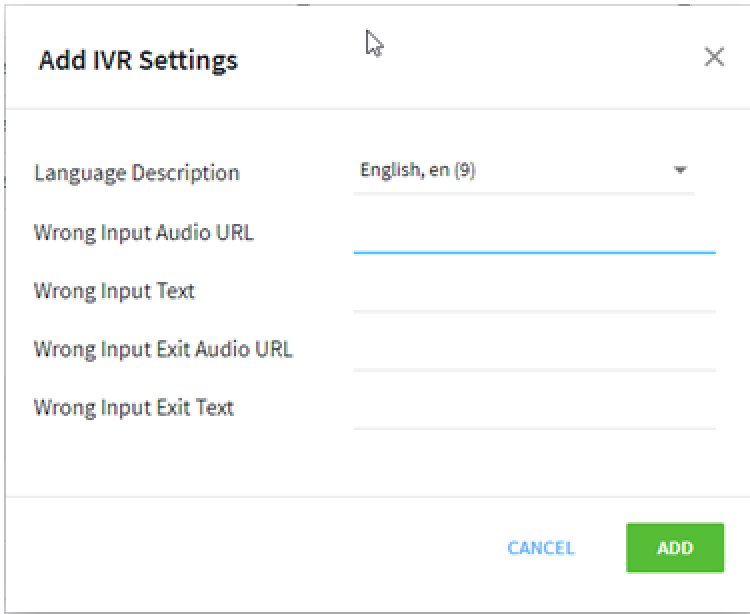


Figure 360 The Add IVR Settings dialog

Enter values in EVERY field - empty fields are not accepted.

3. On completion click **Add**.

   The system checks the values for validity and displays warning messages if any value has an incorrect format. Assuming the settings are accepted, the set appears as a new row in the grid in the top frame.

To edit an existing IVR setting:

1. Select the required row in the list and either click the **Edit IVR Settings** button  on the toolbar, or right-click the desired row and choose **Edit IVR Settings** from the context menu that appears.

   The Edit IVR Settings dialog opens.

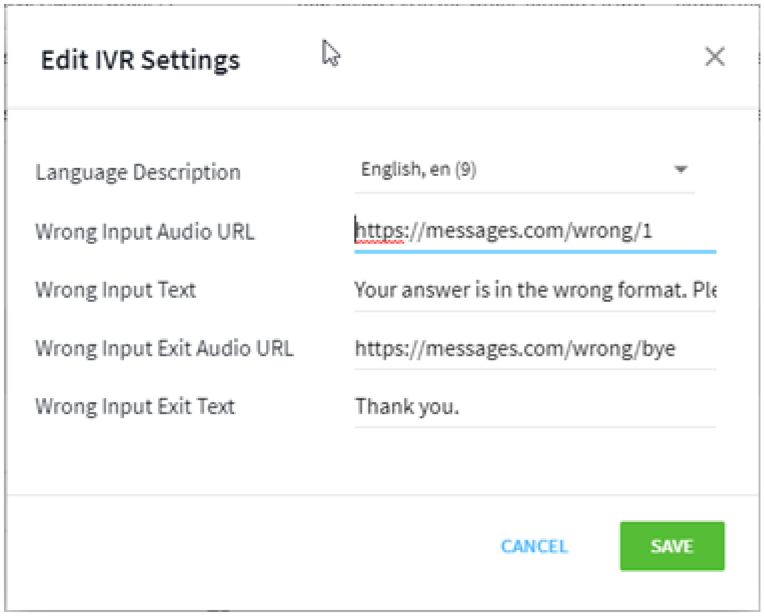


Figure 361 The Edit IVR Settings dialog

2. Edit the settings as required.
3. On completion click **Save**.

   The system checks the values for validity and displays warning messages if any value has an incorrect format.

To delete an IVR setting:

1. To delete one or more sets of IVR settings, select the set(s) in the list in the upper frame and either click the **Delete IVR Setting** button on the toolbar, or right-click on one of the selected sets and choose **Delete IVR Setting** from the context menu.

   A confirmation dialog appears.

2. Confirm the deletion.

To configure the General IVR settings:

Enter values in the appropriate fields in the lower frame. The fields are:

- **Terminal DTMF Character** - The terminal DTMF character for DTMF input recognition. A value must be a single symbol.
- **Media Format** - The media format of the resulting recording.
- **Emit a tone prior to recording** - When this option is enabled, a tone is emitted prior to recording .
- **Max Duration, sec** - The maximum duration (in seconds) of the recording. The value must be a positive number.
- **Silence Interval, sec** - The period of silence (in seconds) that indicates end of speech. The value must be a positive number.
- **Transfer timeout** - The timeout value (in seconds) which determines how long the system will wait when attempting to transfer from IVR to a live agent. If the transfer to a live agent is not completed within the given timeout period it will be returned to IVR. The value supplied must be a positive number.
- **Treat Wrong DTMF as local** - When enabled, any DTMF key stroke not matched by an active grammar will be treated as a match of an active (anonymous) local DTMF grammar.

8.7. Configuring the External Transfer Settings

If interviewers need to be able to transfer calls externally, the supervisor must first define external (not belonging to their company) telephone numbers and assign them to the appropriate surveys. The interviewers are then provided a choice of numbers to which they can transfer a call if necessary.

You define external telephone numbers for call transfers in the External Transfer section of the Resources tab.

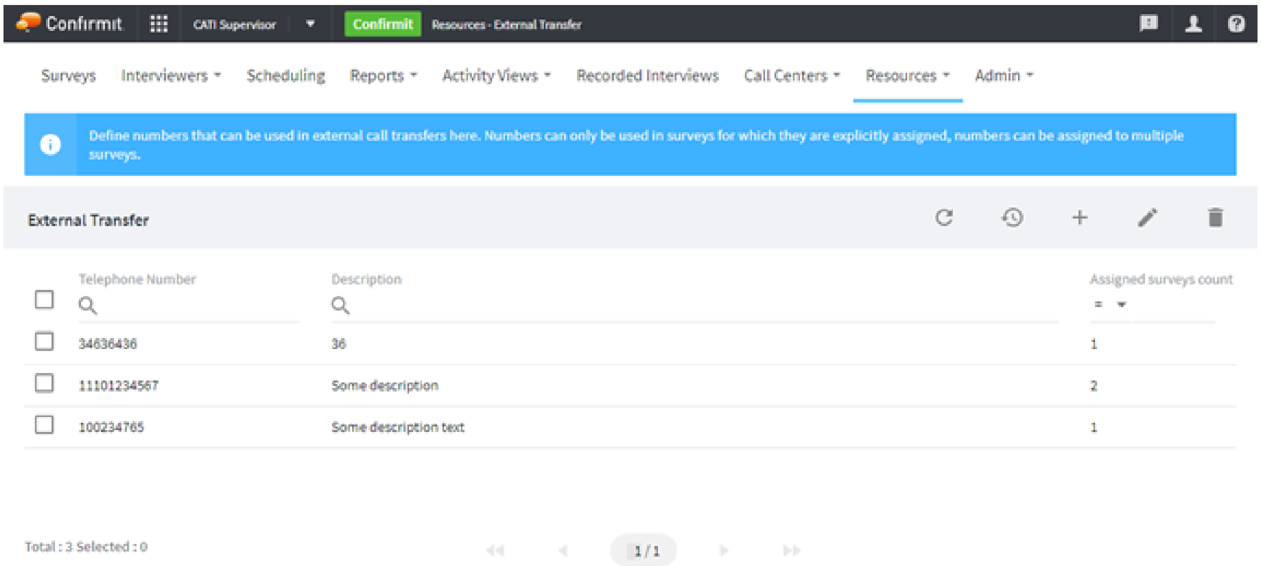


Figure 362 Example of the External Transfer tab

The list in the upper frame provides the following information:

- **Telephone number -** external telephone number to which interviewers would be able to transfer calls when they work with surveys assigned for this number;
- **Description -** optional description of this number;
- **Assigned surveys count -** shows how many surveys are assigned to this telephone number.

You can add new, or edit or delete existing telephone numbers at any time.

To add an external telephone number:

1. Go to the **Resources > External Transfer** tab.

   A list of the existing external telephone numbers is displayed.

2. Click the **Add** button + on the frame toolbar, or right-click any grid row and choose **Add** from the context menu that appears.

   The Add dialog appears.

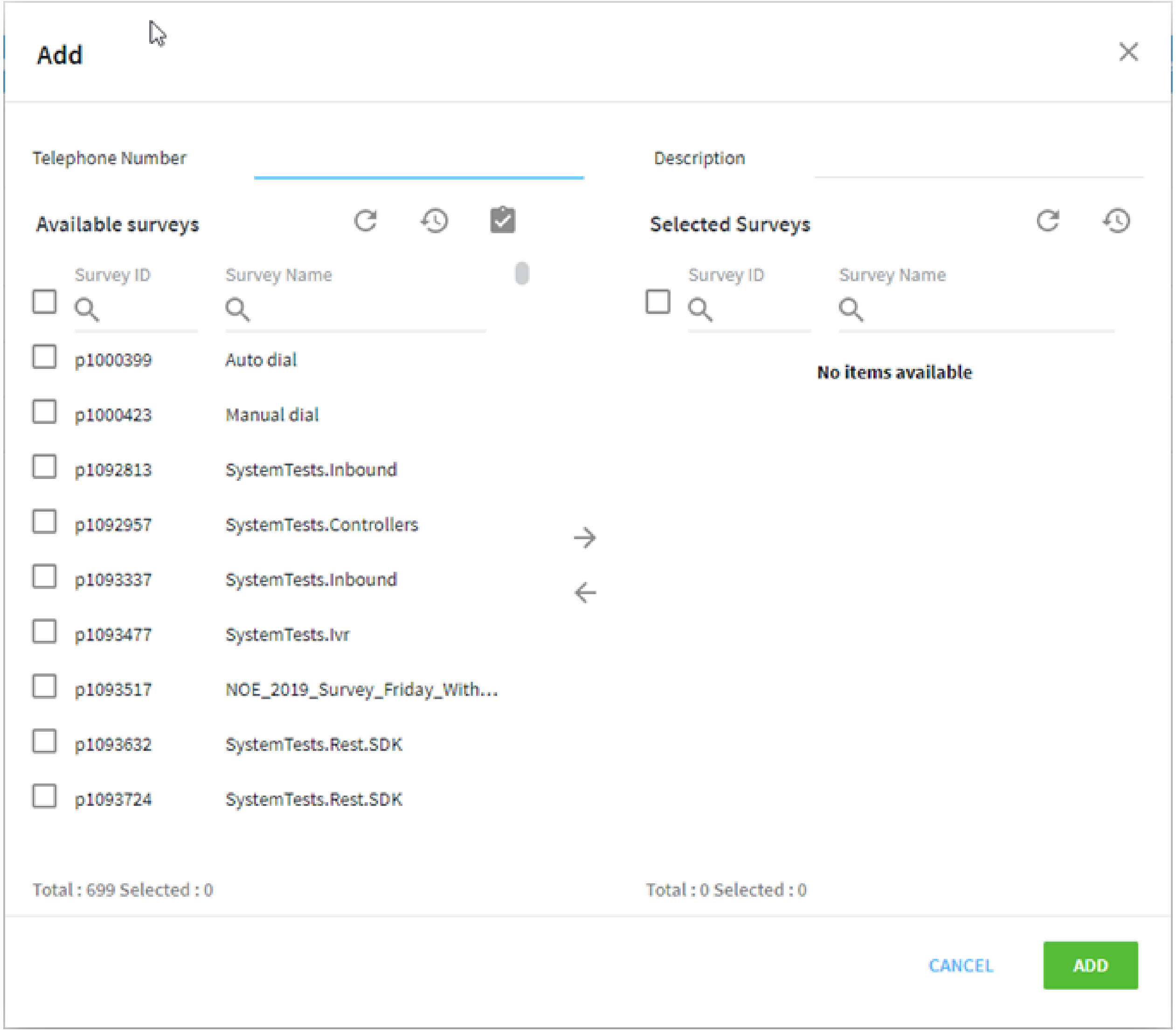


Figure 363 Example of the Add dialog

3. Enter the telephone number in the Telephone Number field.

   Only digits are allowed in this field; do not include any other symbols or spaces. A single telephone number only is allowed.

Note that one external telephone number can be assigned to several surveys. You are recommended to enter a description of the number in the Description field, though this is optional.

4. Select one or more surveys in the Available Surveys pane and click the right-arrow button to move them to the Selected Surveys pane.

   These surveys will be assigned to the specified external telephone number. To de-assign surveys, select them in the Selected Surveys pane and then click the left-arrow button to move them back to the Available Surveys pane.

5. On completion click the **Add** button.

   The specified external telephone number is added to the list.

To edit the list of external telephone numbers:

1. Select in the list the telephone number that you wish to edit and click the **Properties** button on the frame toolbar, or right-click the telephone number in the list and choose **Properties** from the context menu.

   The Edit dialog opens.

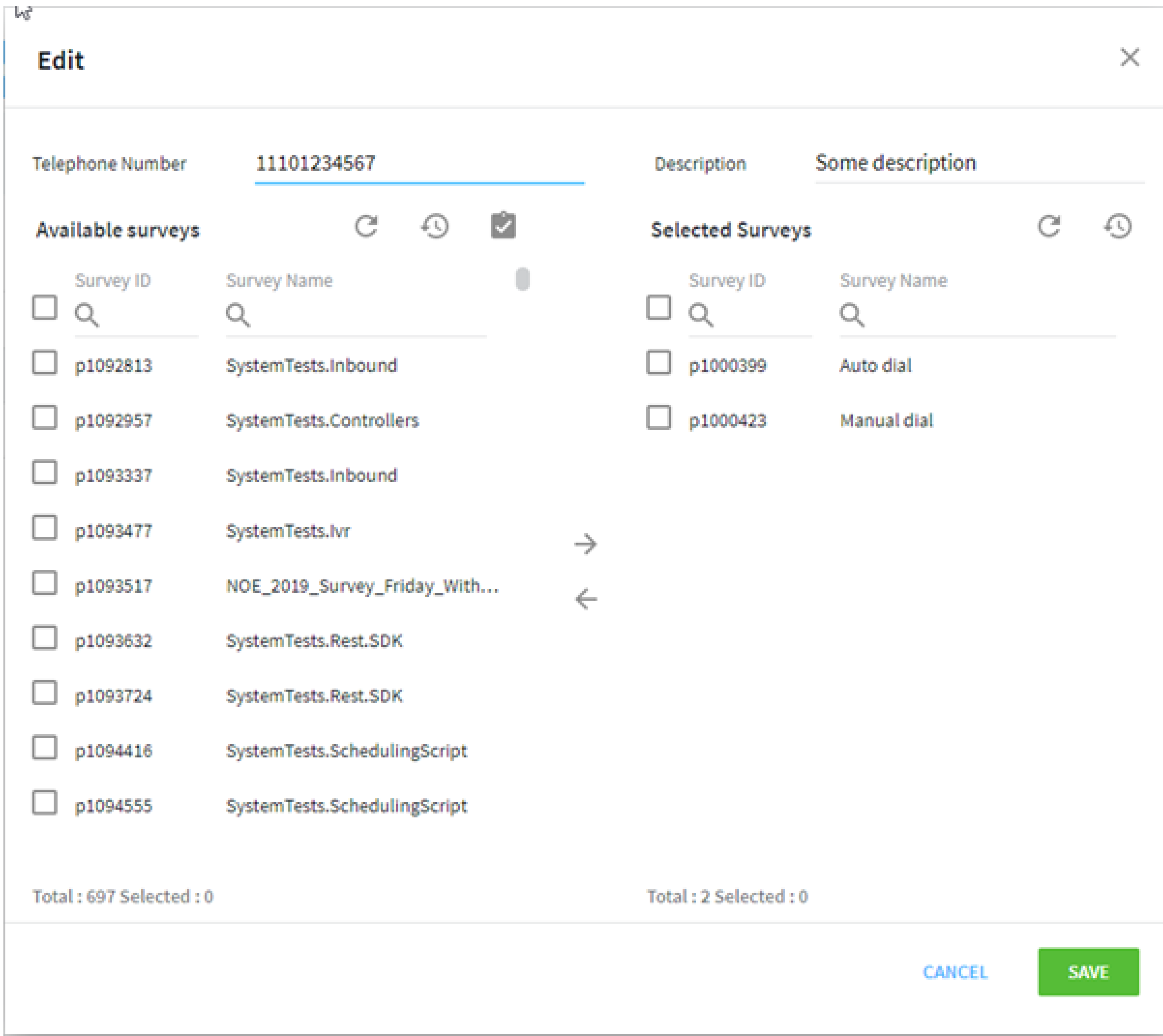


Figure 364 Example of the external telephone number Edit dialog

   The existing properties of the external telephone number are displayed.

2. Edit as appropriate.
3. On completion click **Save** in the lower-right corner of the dialog to confirm the changes.

   The Edit dialog closes and the number in the grid is updated.

To delete an external number:

1. Select in the list the numbers you wish to delete, and click the **Delete** button on the frame toolbar or right-click the selection and choose **Delete** from the context menu.

A confirmation dialog opens.

2. Click **OK** in the dialog to proceed with deletion.

8.8. Creating and Managing the Telephone Number Blacklist

In the event some "respondents" have asked not to be contacted, CATI Supervisor can prevent specified telephone numbers being dialed. This option is applied on the company level, and the list of "not to be dialed" telephone numbers (the "blacklist") is automatically used with each survey conducted by this company.

To open the telephone number blacklist go to the **Resources > Telephone Blacklist** option.

You create the list by adding numbers to it, and to simplify the process you can import a file containing the telephone numbers. You then activate the blacklist function in the Forsta authoring application on the **Survey Settings > CATI Options** tab. The blacklist will remain in effect until it is disabled using the same procedure, and it can be edited at any time.

Note that the telephone blacklist can include a maximum of 4,000,000 telephone numbers. Refer to the appropriate section of the Forsta authoring user guide.

The current blacklist status can be monitored in CATI Supervisor for each survey. It is displayed as a non-editable option on the **Survey Information > General** tab (go to Viewing and Modifying a Survey's General Properties on page 68 for more information).

Before a call is sent to the Interviewer's console or to a dialer, the CATI system compares the telephone number to the blacklist. If the number matches a number on the blacklist, the number is not dialed, the call is not delivered to the interviewer, the interview extended status is changed to "Blacklist", and the scheduling is not run for this call.

The authoring module performs the check whenever a fresh sample list is uploaded. Refer to the authoring module documentation for further details.

A count of the numbers that are blocked by the Blacklist procedure at sample loading time is displayed in the Sample Utilization Report in the "Blocked by blacklist" column (go to Generating the Sample Utilization Report on page 426 for more information).

Note that interviews/calls will not be executed via the survey scheduling rules even if the sample was loaded with the "Full Scheduling" option enabled.

Important!

Bear in mind that a number from the blacklist CAN still be dialed in the following situations:

1) When the "Manual Redial" operation is executed from the console an interviewer can type in any telephone number, and this could be a number which is contained in the Blacklist. This is only possible when a dialer supporting Redial functionality is used and the "Redial" button is enabled AND the additional option to redial with an alternative number is enabled **(go to Interviewer Console Settings Section on page 451 for more information)****.**

2) If the 'varname' variable is used where 'varname' is not a 'TelephoneNumber' variable, it could accept a number included in the Blacklist.

3) When executing a regular "Dial" operation from the console when the Blacklist was changed AFTER the interview was sent to the console.

To open the blacklist:

Go to the Resources object tab then choose **Telephone Blacklist**. The right frame displays a table containing any numbers already included in the blacklist. If the blacklist does not contain any numbers, the table will be empty.

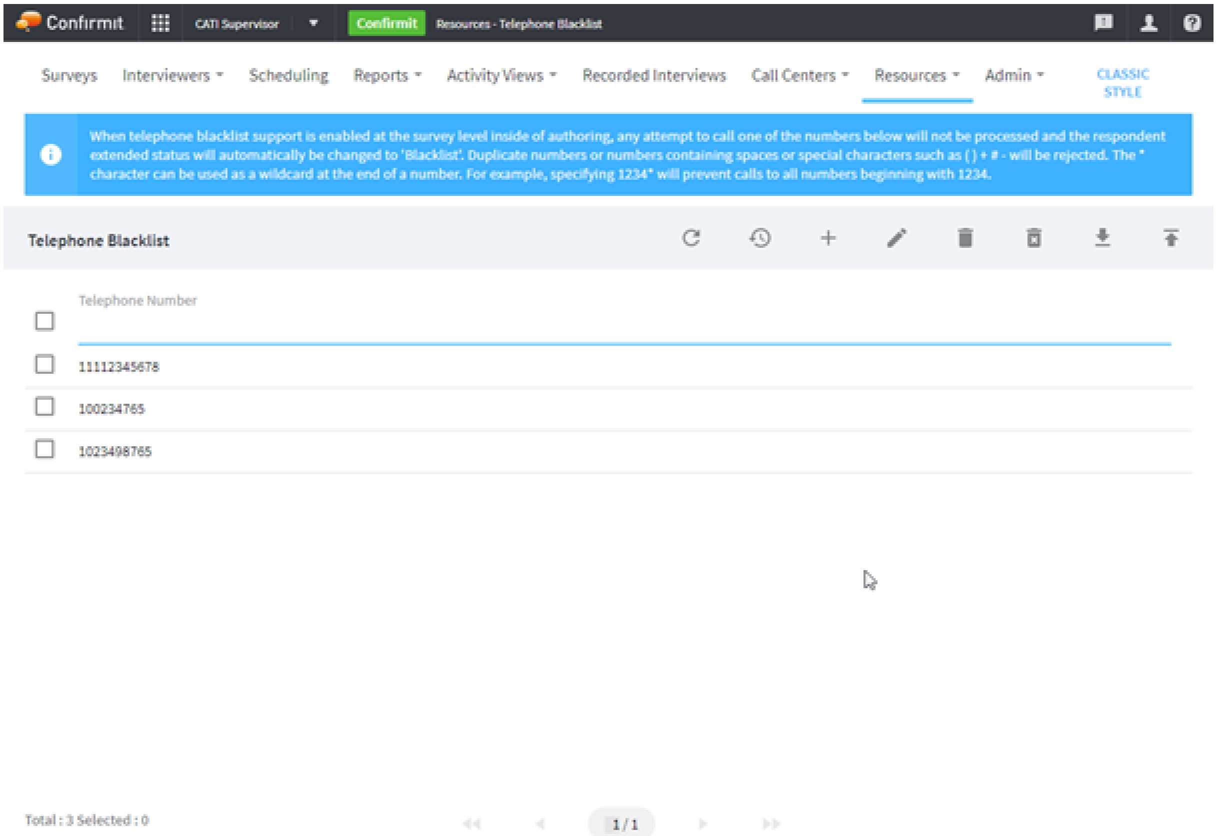


Figure 365 The Telephone number blacklist displayed in the right frame

To add a number to the blacklist:

1. Click the **Add** button on the toolbar, or right-click anywhere inside the grid in the right frame and choose **Add** from the context menu that appears.

   The Add Blacklist Number dialog opens.

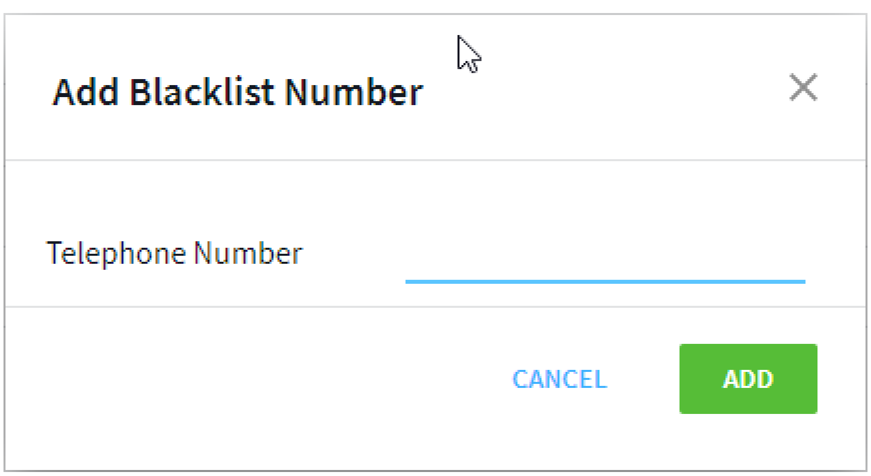


Figure 366 Adding the telephone number to the blacklist

2. Enter the telephone number in the field.

   Note that duplicate numbers or numbers containing spaces or special characters such as ( ) + # - will be rejected.

   The wildcard symbol * can be used, so you can set up a filter in the blacklist to prevent calls to all numbers that begin with the same sequence. So for example 123456999 and 123456998 should be filtered using 123456*. Note that the wildcard symbol * can only be applied to the end of the number; it cannot be included in the middle or start of the number.

3. Click **Add** to add the number, or the specified filter, to the list. A new row is added to the grid.

   Click **Cancel** to cancel the number addition.

To edit an existing number in the blacklist:

1. Select the required number and either click the **Edit** button on the toolbar, or right-click the desired number and choose **Edit** from the context menu that appears.

   The Edit Blacklist Number dialog appears.

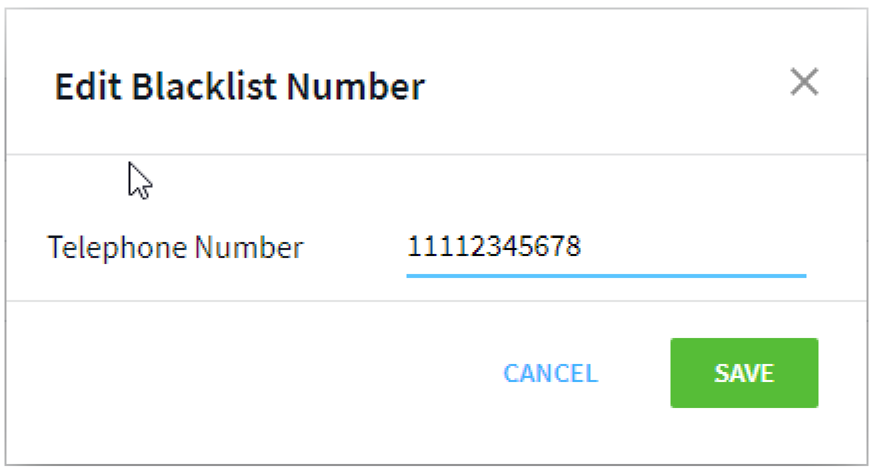


Figure 367 Editing the telephone number from the blacklist

2. Edit the number as desired. Remember that duplicate numbers or numbers containing spaces or special characters such as ( ) + # - will be rejected.
3. Click **Save** to save the edited number.

   Click **Cancel** to cancel editing. The selected number will not change.

To delete one or more numbers from the blacklist:

1. Select the numbers in the list in the right frame, then either click the **Delete** button on the toolbar or right-click on a selected number and choose **Delete** from the context menu that appears.

   A confirmation dialog appears.

2. Click **OK** to confirm the deletion or click **Cancel** to abort the operation.

To delete ALL numbers in the blacklist:

1. Click the **Delete All** button on the toolbar.

   A confirmation dialog appears.

2. Click **OK** to confirm deletion.

All blacklisted numbers will be removed from the system (not only those displayed on the current page!).

Exporting the blacklist:

You can export the telephone number blacklist to a plain text file with all telephone numbers arranged in a single column (without a header), one number per row. The resulting file will be automatically archived and optionally saved to the desired location. The resulting file can be encrypted to restrict access to the data it contains (go to The Security Settings Section on page 453 for more information).

1. Click the **Export Blacklist** button on the toolbar to start the procedure.

   You will be asked what you want to do with the exported file: save, open etc.

Importing a blacklist:

You can simplify the blacklist creation process by importing a file containing a list of the telephone numbers that are to be included in the list. This file must be a plain text file with the telephone numbers arranged in a single column. The column must be without a header and shall contain one number per row. You can import a previously exported blacklist file. Duplicate numbers or numbers containing spaces or special characters such as ( ) + # are not allowed; any such numbers will be rejected when the import procedure starts.

1. Click the **Import** button on the toolbar.

   The Select file for import dialog opens.

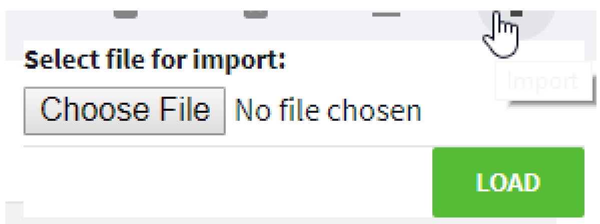


Figure 368 Importing the file containing telephone number list

2. Enter the path to the file in the Select file for import field, or click the **Browse** button and browse to the file and select it.
3. Click **Load**.

   The import process runs, and on completion the list refreshes and displays the numbers contained in the imported file.

   To cancel the Import operation and close the Import file dialog, click anywhere outside the dialog. Note that once the import operation is started it cannot be aborted.

8.9. Viewing Tasks Performed by Supervisors

A supervisor can monitor a range of tasks that were performed in the system during a specified time period. This action is available for any supervisor.

A "normal" supervisor has access only to the tasks related to his call center, while a "ProS" supervisor can access any task that was run in any call center registered to their company.

Any supervisor can abort tasks while they are in the "Executing" status.

The Tasks view provides the following information regarding each task:

- **Task ID -** ID of the task.
- **User ID -** ID of the user who initiated the task.
- **Survey ID -** ID of the survey for which the task was performed.

- **Task type -** the type of task that was (or is currently being) carried out.
- **Status -** the current execution status of the task.
- **Start time -** the time at which the task execution was initiated.
- **Duration -** the time elapsed from the moment the task was initiated up to the moment the task execution stopped (or up to the current moment in case the task is still in the "Executing" or "Queued" status).

To view the task list:

1. Go to the **Resources > Tasks** option.

   A list of tasks performed by supervisors assigned to the current call center (or to all call centers in the company) opens. If no tasks have been performed, the list will appear empty.

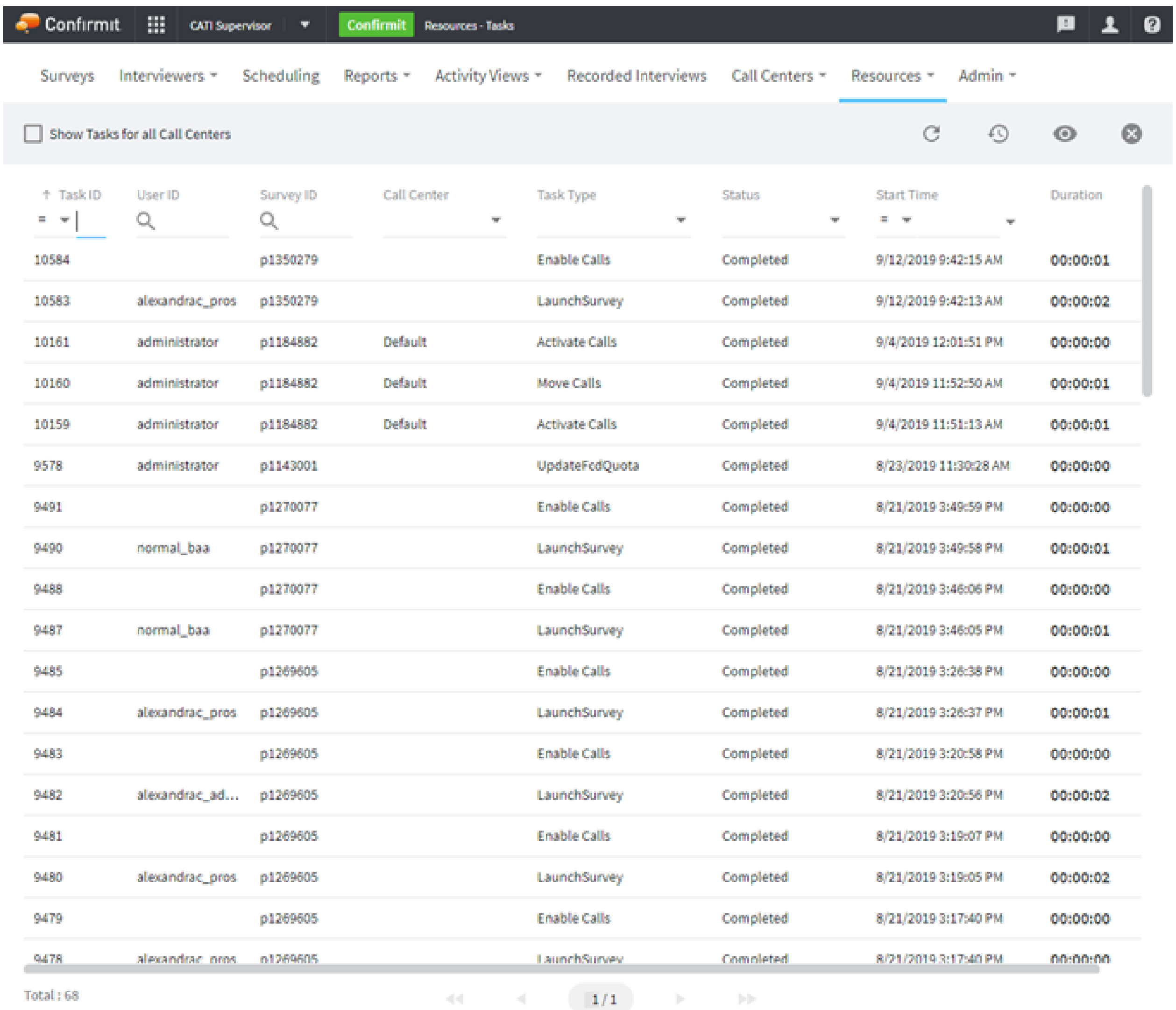


Figure 369 Example of the task list for the current call center

By default the Show Tasks for all Call Centers box is deselected, so only the tasks for the current call center are listed. Check the box to list the tasks for all the call centers in the company.

2. To view the details of a task, select the task in the list and either right-click it and choose **Details** from the context menu or click the **Details** button on the frame toolbar.

   The Task View dialog opens. This contains three tabs: Progress, Parameters and Specific Parameters.

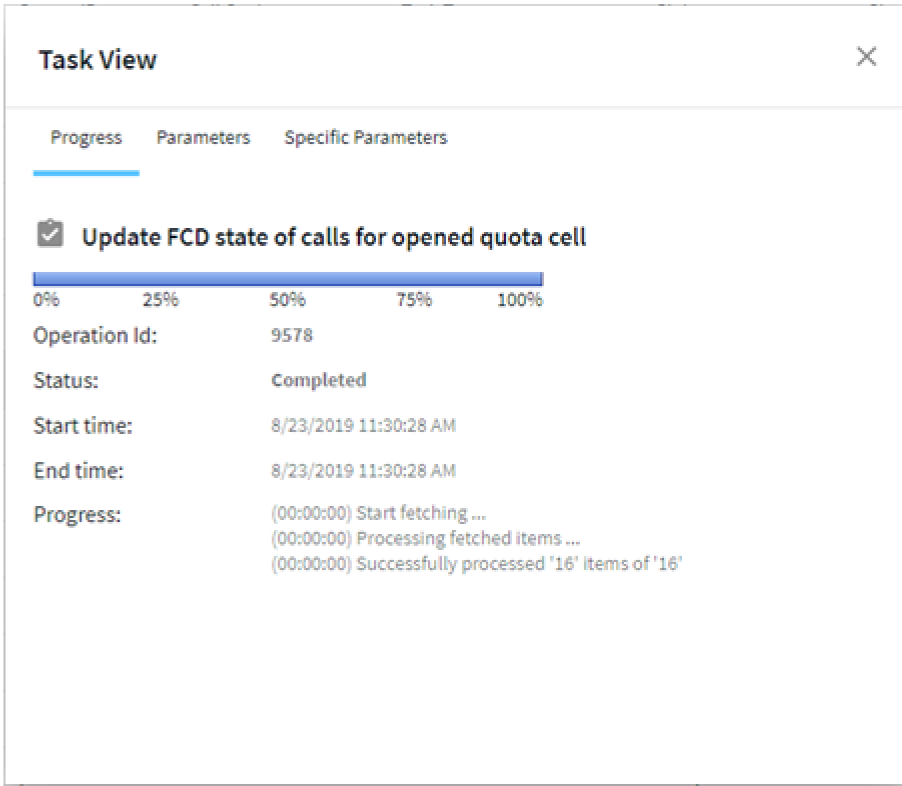


Figure 370 Task View dialog - Progress tab

The Progress tab displays information about the task launch and progress. This is usually similar to what the user sees in the Progress dialog after the task is launched.

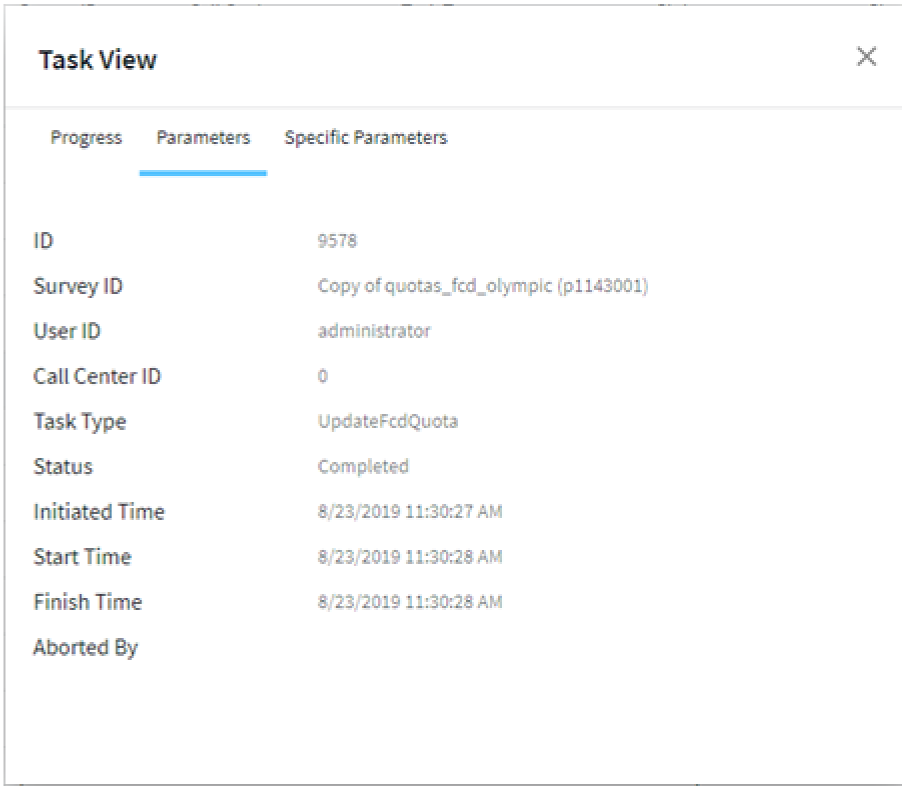


Figure 371 Example of the Parameters tab

The Parameters tab contains general task parameters.

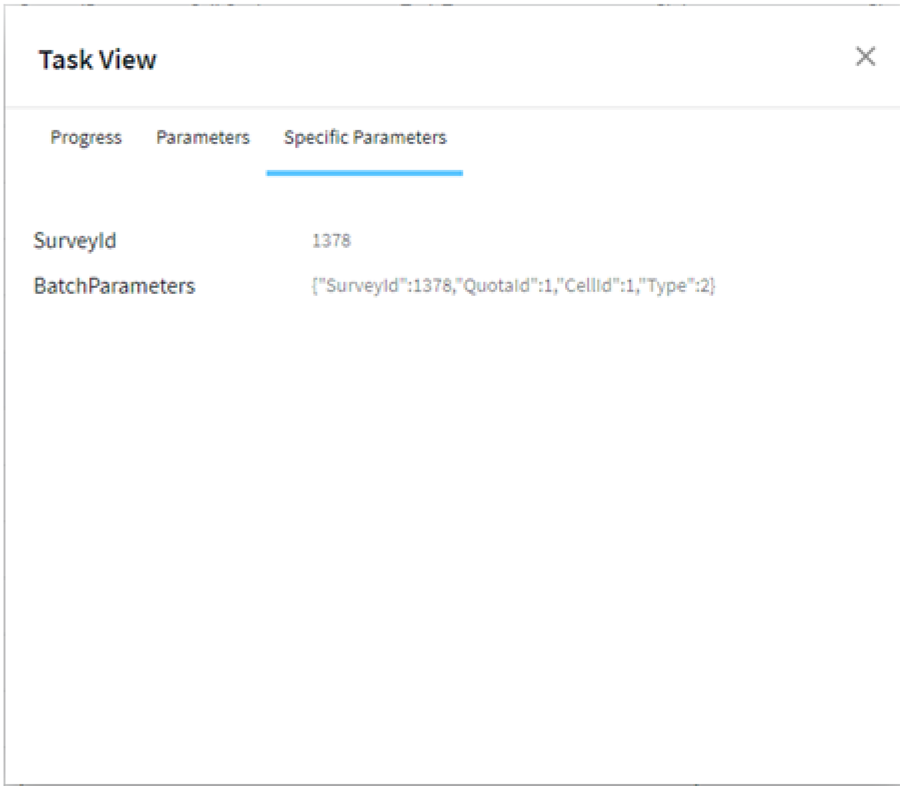


Figure 372 Example of the Specific Parameters tab

The Specific Parameters tab shows configuration and run parameters for the selected task.

Click the **X** button in the upper-right corner of the dialog to close it.

A supervisor can abort the selected task while the Status column for that task displays "Executing".

- To abort a task, select the task in the list and choose the **Task Abort** button in the frame toolbar. The aborted task will be assigned the "Aborted" status.

8.10. Configuring the Master Time-zone List

The Master Time-zone list includes officially used time-zones that are available for activation in the CATI Supervisor module, that is, they are not directly used with any other CATI object. The supervisor can select a time-zone from this list and make it "active". Active time-zones can be used as object properties. For example, an active time-zone can be specified as the respondent time-zone (go to Configuring the Active Timezone List on page 388 for more information).

For information on the bias offset for a time-zone and for a complete reference list of time-zones see Appendix E (go to Appendix E - Time Zone List on page 465 for more information).

When working with the Master Time-zone objects you can perform the following operations:

- View the Master Time-zone list.
- Make a master time-zone active.
- Refresh the Master Time-zone list.

8.10.1. Viewing the Master Timezone List

To view the Master Timezone list:

1. Go to the **Resources > Master Timezone List** option in the drop-down list.

The list of Master Timezones opens.

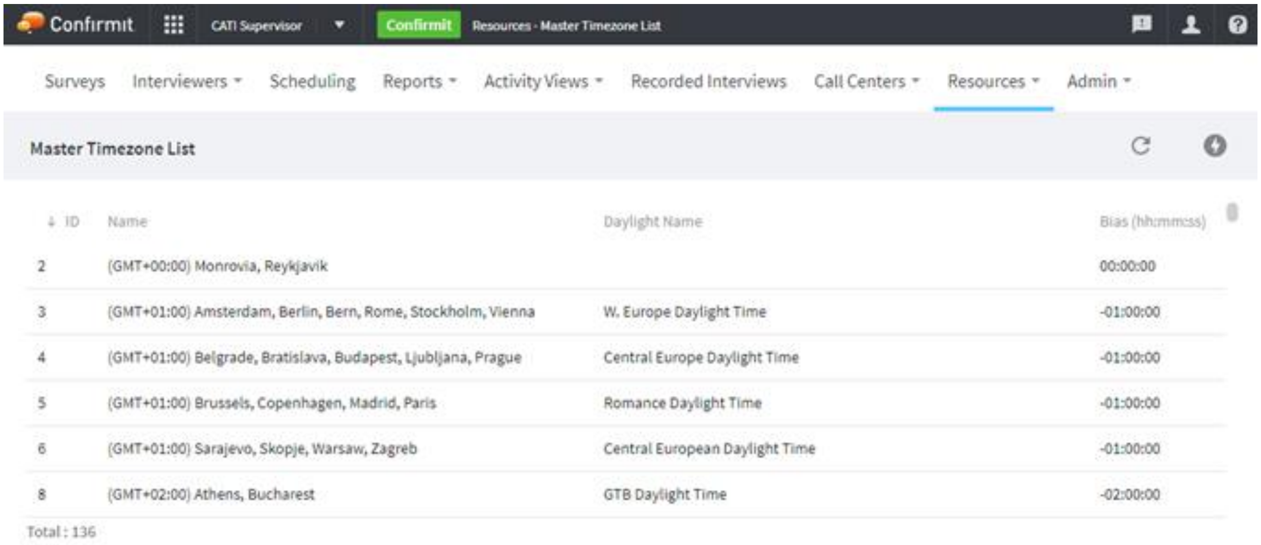


Figure 373 The Master Timezone list

The grid contains the following columns:

- **ID -** ID of the time zone.
- **Name -** time zone name.
- **Daylight Name -** the name of the time zone which is used to identify it when daylight saving time is applied in that region.
- **Bias -** the difference from GMT, in hh:mm:ss format.

When the list of Master Timezones is displayed, its toolbar contains the following object-specific button set.

Button	Description	Function
	REFRESH	Updates the Master Timezone list
	ACTIVATE	Activates the selected Master Timezone

8.10.2. Activating the Selected Master Timezone

To activate the selected Master Timezone:

1. Select the Master Timezone you wish to use from the list and click the **Activate** button , or right-click the item and choose **Activate** from the shortcut menu.

   The selected Master Timezone is moved from the Master Timezones List to the list of Active Timezones List (go to Configuring the Active Timezone List on page 388 for more information).
2. Repeat the procedure for other Master Timezones as required.

8.11. Configuring the Active Timezone List

The Active Timezone list includes timezones that are activated, that is they can be used directly with any other object. The supervisor can select an active zone from the list and use it as an object property, for example an active timezone can be specified as the respondent timezone (go to Configuring the Master Time-zone List on page 386 for more information).

For information on timezone bias and for a complete reference list of timezones refer to Appendix E (go to Appendix E - Time Zone List on page 465 for more information).

When working with the Active Timezone objects you can perform the following operations:

- View the Active Timezone list (go to Viewing the Active Timezone List on page 388 for more information).
- Set an Active Timezone as local (go to Setting the Selected Active Timezone as Local on page 389 for more information).
- Delete an Active Timezone (go to Deleting (Deactivating) the Selected Active Timezone on page 389 for more information).
- Delete all unused Active Timezones (go to Deleting the Unused Active Timezones on page 389 for more information).
- Refresh the Master Timezone list.

8.11.1. Viewing the Active Timezone List

To view the Active Timezone list:

1. Change to the Resources tab in the Navigation menu, then choose the Active Timezone List section in the drop-down list. This will display the list of Active Timezones in the top frame of the CATI Supervisor main window.

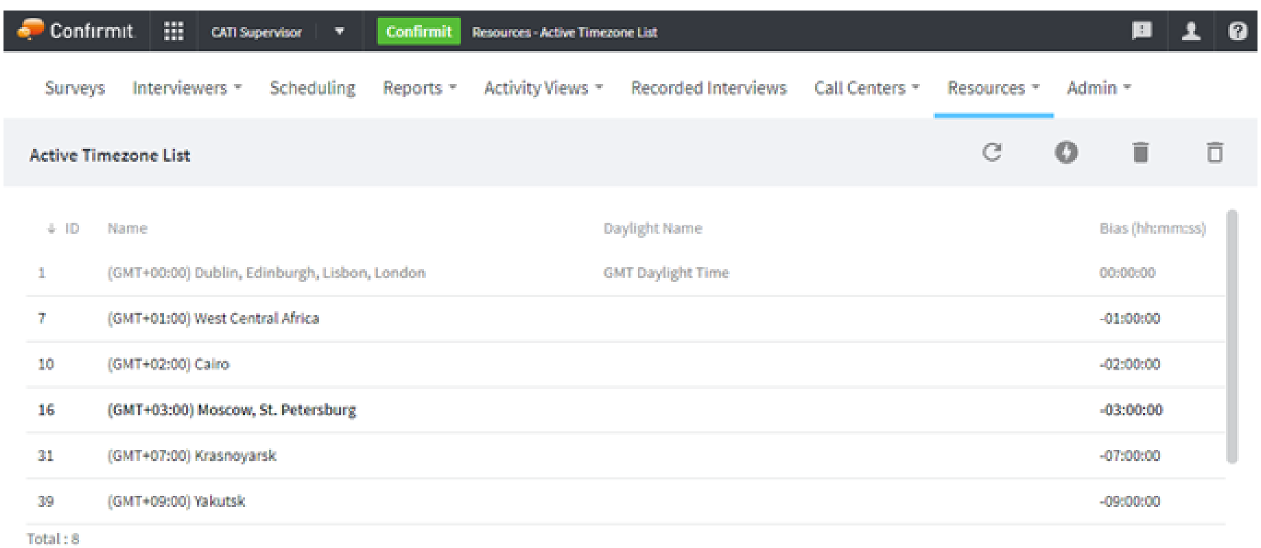


Figure 374 Viewing the Active Timezone list in the top frame

The grid contains the following columns:

- ID - ID of the time zone;
- Name - time zone name;

- Daylight Name - the name of the time zone which is used to identify it when daylight saving time is applied in that region;
- Bias - difference from the GMT (in hh:mm:ss format).

2. When the top right frame displays the list of Active Timezones its toolbar contains the following object specific button set.

Button	Description	Function
	REFRESH	Updates the Active Timezone list
	SET AS LOCAL	Sets the selected Active Timezone as local
	DELETE	Deletes the selected Active Timezone
	DELETE UNUSED	Deletes all the unused Active Timezones

8.11.2. Setting the Selected Active Timezone as Local

To set the selected Master Timezone as local:

1. Select the required Master Timezone List item in the grid in the top frame and click the **Set as local** button on the toolbar, or right-click this item and choose **Set as local** from the shortcut menu.

   The Active Timezone list will be refreshed and the selected timezone will be displayed in bold typeface.

If you set another timezone as local, the previous one will be shown in normal typeface, and the new one will be marked with bold typeface.

8.11.3. Deleting (Deactivating) the Selected Active Timezone

To delete the selected Active Timezone:

1. Select the required Active Timezone List item in the grid in the top frame and click the Delete button on the toolbar, or right-click this item and choose Delete from the shortcut menu.

   This will delete the selected timezone from the list of Active Timezones and simultaneously add it to the list of Master Timezones (i.e. you will deactivate this timezone).

2. Repeat the procedure for other Master Timezones if required.

8.11.4. Deleting the Unused Active Timezones

In the event the Active Timezone List contains timezones you do not use as properties with other objects, you may wish to remove the unused timezones. To do this:

1. Click any row in the grid in the top frame and click the **Delete unused** button on the toolbar, or right-click any row in the grid and choose **Delete unused** from the shortcut menu.

   This will delete all unused active timezones from the list of Active Timezones, and simultaneously add all these timezones to the list of Master Timezones (i.e. you will deactivate these timezones).

8.12. Viewing Software Version and Copyright Information

You can view general information regarding the version of the CATI Supervisor module and an existing copyright.

To view the About information:

1. Change to the Resources tab in the Navigation menu, then choose the About section in the drop-down list. This will display the information regarding the current software version number, and the copyright information in the top frame of the CATI Supervisor main window.

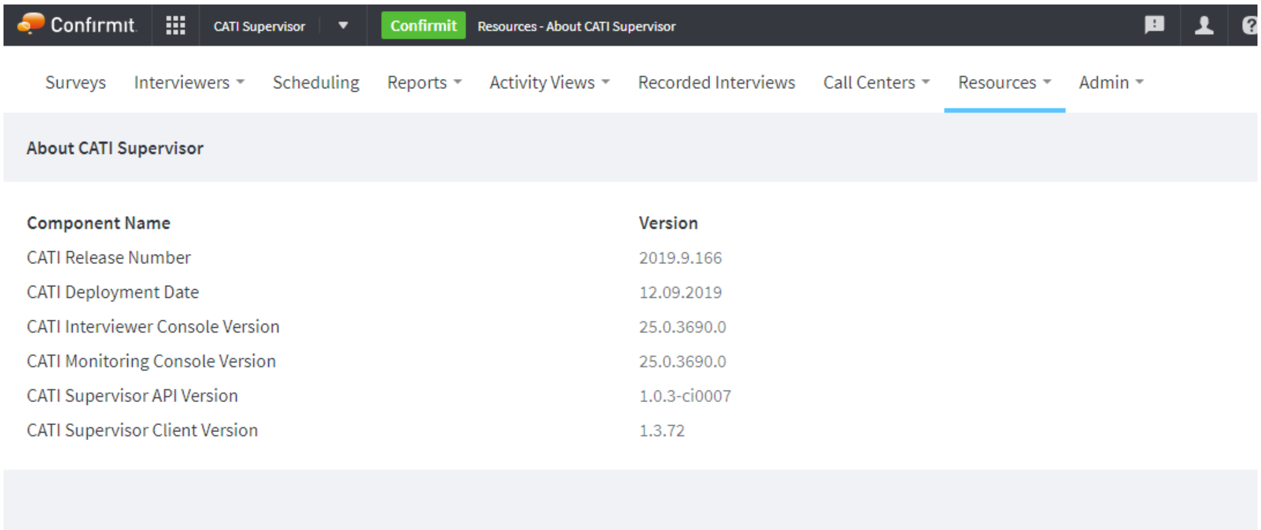


Figure 375 Viewing the general software information

9. Generating Reports in the CATI Supervisor

Reports in the CATI Supervisor module provide important statistics regarding different aspects of the surveying process. This allows to monitor efficiency of different configurations and settings, interviewers' work and much more.

The CATI Supervisor provides the user with the possibility of generating the following reports:

- Survey Overview (see (go to Generating the Survey Overview Report on page 392 for more information))
- Survey Productivity report (see (go to Generating the Survey Productivity Report on page 398 for more information))
- Interviewer Productivity (see (go to Generating the Interviewer Productivity Report on page 404 for more information))
- Interviewer Sessions (see (go to Generating the Interviewer Sessions Report on page 414 for more information))
- Sample Status Summary (see (go to Generating the Sample Status Summary Report on page 419 for more information))
- Sample Utilization report (see (go to Generating the Sample Utilization Report on page 426 for more information))
- Call Attempts Log (see (go to Viewing the Call Attempts Report on page 429 for more information))
- Quota Progress report (see (go to Generating the Quota Progress Report on page 417 for more information))
- Attempts by Disposition (see (go to Generating the Attempts by Disposition Report on page 432 for more information))
- Number of Attempts (see (go to Generating the Number of Attempts Report on page 435 for more information))
- Interviewer Submission Details (see (go to Viewing the Interviewer Submission Details Log on page 442 for more information))
- Aggregated Interviewer Submission (see (go to Generating the Aggregated Interviewer Submission Report on page 444 for more information))
- Inbound calls history report (see (go to Viewing the Inbound Call History Log on page 441 for more information))
- Inbound Call Summary (see (go to Generating the Inbound Call Summary Report on page 437 for more information))

Reports should be configured before they are generated.

Generated reports can be saved in a number of common formats and viewed using an Internet browser or an appropriate application capable of reading the required format.

To choose a report supervisor should first choose **Reports** in the Navigation menu. This unfolds the drop-down list of the available Report types. To generate a report the supervisor should first select the report type. Report of the chosen type then opens in the CATI Supervisor, and the user can proceed with configuring the report.

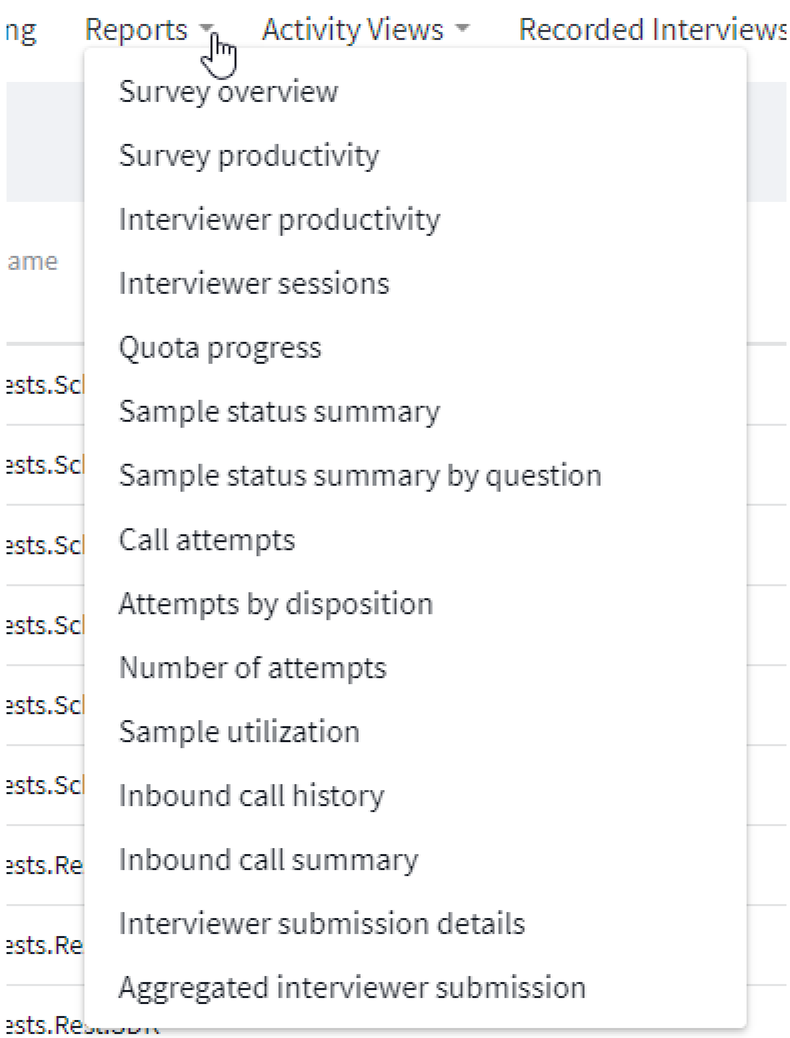


Figure 376 Selecting a report type in the Navigation menu

9.1. Generating the Survey Overview Report

The Survey Overview Report provides statistics concerning the interviewing tasks for the selected surveys.

This is a multi survey report which means it can be configured to produce statistics for a number of surveys at once.

To generate the Survey Overview:

1. Choose Reports in the Navigation menu, then choose the Survey Overview Report from the drop-down list that unfolds.

   Alternatively you can run the report from the Surveys tab. Choose the Surveys tab in the Navigation frame, select a survey in the list in the top right frame, right-click this survey and choose Reports/Survey Overview from the context menu that appears.

   This will display the Survey Overview Report settings (this dialog opens in the separate window if you run the command from the Surveys list).

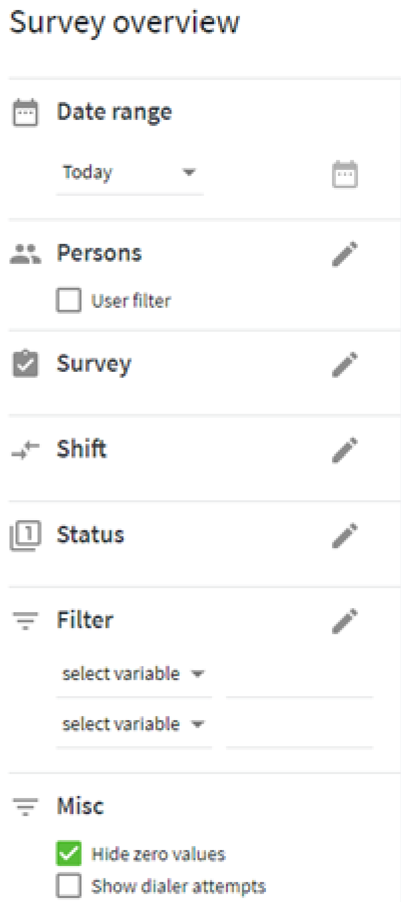


Figure 377 Configuring the Survey Overview Report

2. The Date Range drop-down box allows selecting the time period for which the report should be generated. You can select a period from the drop-down list, or you can Click the Range... button to display the Date Range form and define the period manually.

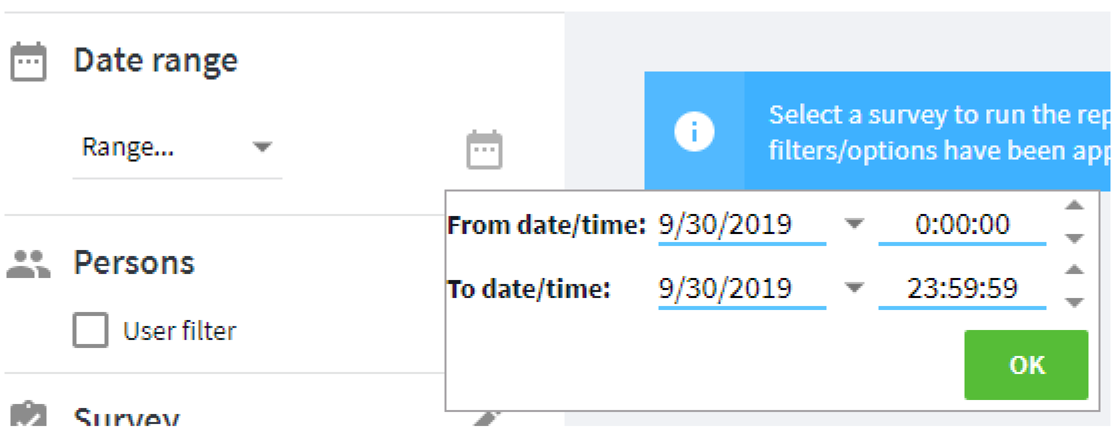


Figure 378 Choosing the date range for the Survey Overview Report

Specify the start and finish time of the desired period using the From and To fields. These fields include the calendar form which opens when you click the arrow button in the date field, and the time spinbox which allows increasing and decreasing value with the help of the buttons, or entering the value manually. Click OK below this list to confirm this setting.

The Dates range drop-down list contains special semi-automatic options - "***n*** days ago". These options allow choosing the date for which the report would be generated automatically, without opening the calendar form. When chosen, each of these options sets a date in the calendar which is 1..7 days before today. For example, if today is May 17, and you choose "2 days ago" from the drop-down list, then May 15 is selected as the report date in the range.

3. Click the Shift button to select a time range that is within the time range you have already selected on the previous step. Whatever date range you select from the Date range drop-down field the Shift selection narrows your choice and limits it to a certain time range (to a shift) that lies within the selected Date range. You may as well skip configuring this option if you want to use all hours within the selected Date range, this is the default setting.

   The start and end times of the shift you choose will be displayed in the generated report.

   When you click the Shift button, the Select Shift page is displayed (see the picture below).

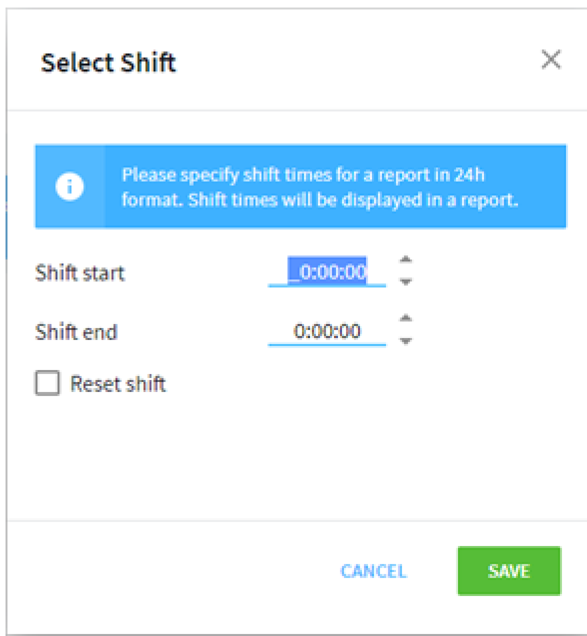


Figure 379 Choosing the Shift start and end times

   Choose the desired start and end times of the shift using corresponding spin controls.

   Click Save when you are done. The page will close and the updated report settings will be saved. The Shift button border will be highlighted in orange color to remind you of the specified shift limitations.

   If you need to reset shift values you have specified you should click the Shift button and check the Reset shift box in the modal dialog. Then you should click the Save button. The shift start and end values will be reset to zeros (the default value) and the Shift button border highlighting will be removed.

4. Status field allows selecting interviews with certain Extended Statuses. Interviews with the selected statuses will be included in the report. Click the Select button and check the required statuses in the scrollable list that appears. Click OK below this list to confirm this setting.

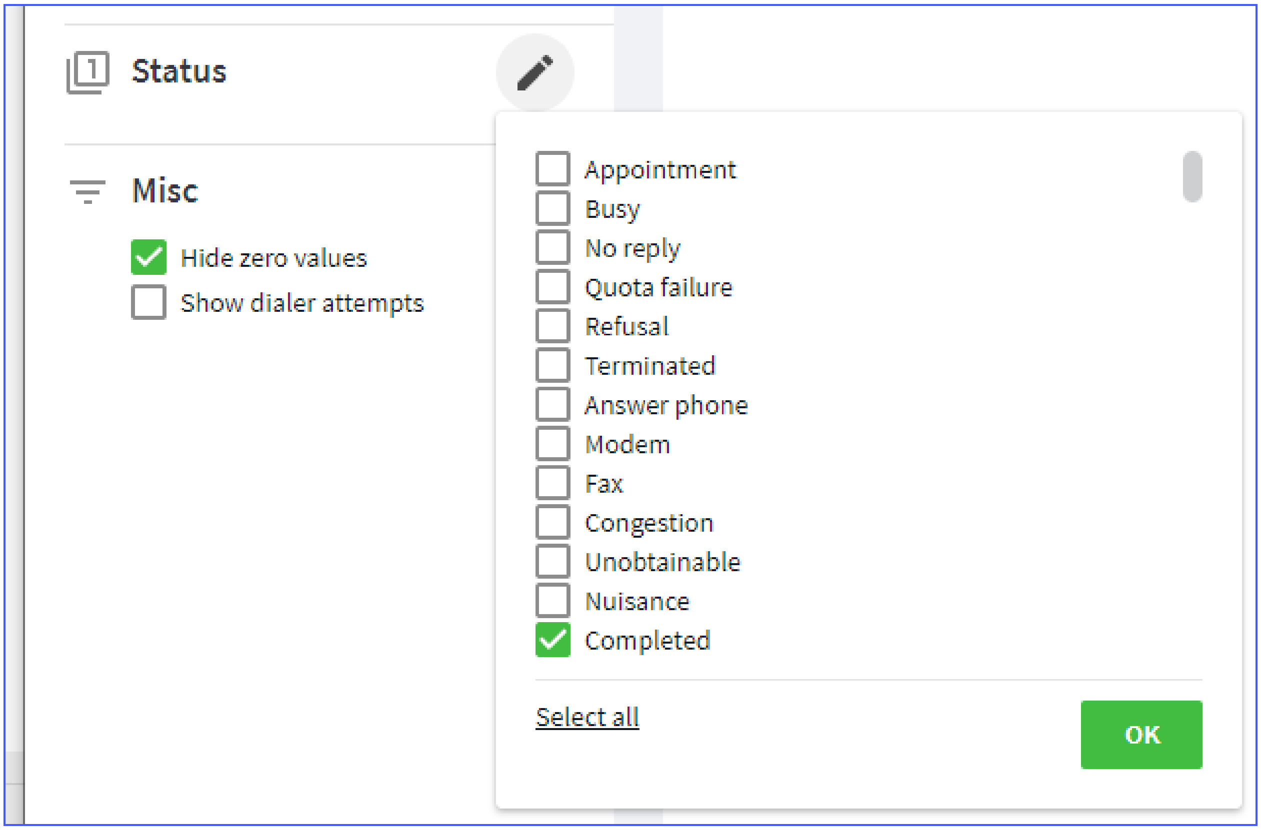


Figure 380 Selecting extended statuses to include into the Survey Overview Report

To select or deselect all the available statuses at once choose the "Select all" or "Deselect all" option under the scrollable list.

5. Select a single survey (or a number of surveys) for which the report will be generated. Click the Select button (Survey) to display the Select Surveys dialog (see description of this form here - Selecting Surveys for the Survey List Activity View). Click Save selected in this dialog to save this setting.

6. You can include additional statistics reflecting the number of times the dialer attempted to connect. This figure is included in the report in case you check the Show dialer attempts box.

7. Additional statistics reflecting the number of times the dialer attempted to connect are included into the report by default when the User filter option is not enabled (when the User filter box is cleared) - see step 8 of this instruction. The user can turn on the User Filter option by checking this box and after that the Show Dialer Attempts option can be configured. These additional statistics are included into the report for the selected interviewers/groups in case you check the Show dialer attempts box, and excluded when you clear this checkbox.

8. When no interviewers or groups are selected the report is generated for all interviewers and groups working for the current company.

Selecting interviewers or interviewer groups

You can select interviewers or groups of interviewers for whom this report will be generated. Check the User filter box and then click the Select button next to this box to display the Select Interviewers/Groups dialog.

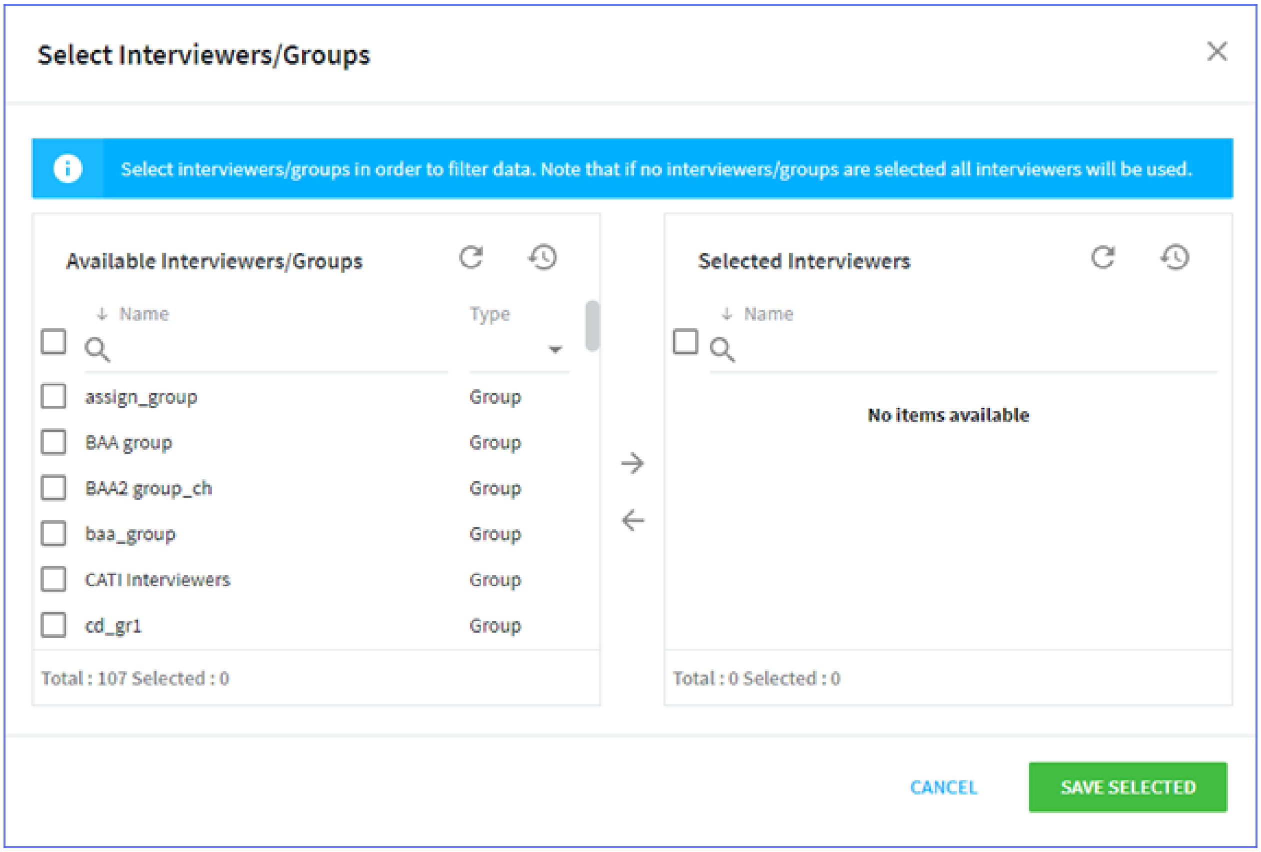


Figure 381 Selecting users to include into the Survey Overview Report

The left frame in this window is called Available Interviewers/Groups and it allows selecting required persons/groups to generate the report for. Use the Type drop-down control in the grid header to reveal/hide persons or groups and check the boxes in front of the particular person/group you need to select.

Click the right arrow located between the frames to add chosen persons/groups to the Selected Interviewers list in the right frame. Selected persons and groups disappear from the left frame and appear in the right frame. Note that each group you add to the Selected list will be expanded and presented as a list of persons belonging to that group.

To delete a person from the Selected... list you should check the box in front of that person's name in the list in the right frame. Repeat this action for all persons you need to delete from the list of selected persons (or check the box in the grid header to select all persons displayed on the current page) and click the left arrow.

Click the Save selected button in this dialog when you are done selecting to save this setting.

9. You can filter the report contents by a survey variable of your choice.

   Note that only variables that have the property "Available as CATI filter" set in Forsta Authoring module become available and can be applied using the variable filter (refer to the Authoring manual for instructions on setting up this property).

   To apply a variable as a filter you should choose the Filter drop-down list (see the picture below), then select a variable from this list and finally enter the required variable value in the box to the right of this drop-down list. You can additionally apply the second filter (the drop-down list and the text field located next to the first group of controls).

   When you apply a variable as a filter you create a filtering condition. When you additionally apply another variable you enhance the condition expression - the second variable is added to this expression using the AND operator (like, for example 'q1=2 AND q2=5').

Note that this filter is available only for reports based on a single survey - if you do not choose a survey when configuring the report, or choose more than one survey, the Filter group of controls will not be available at all.

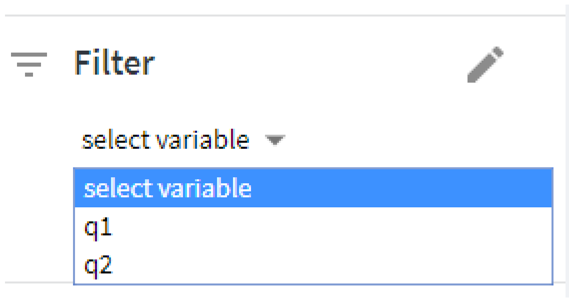


Figure 382 Choosing a variable to filter the Survey Overview report data

10. Click the Build Report button to generate the Survey Overview Report.

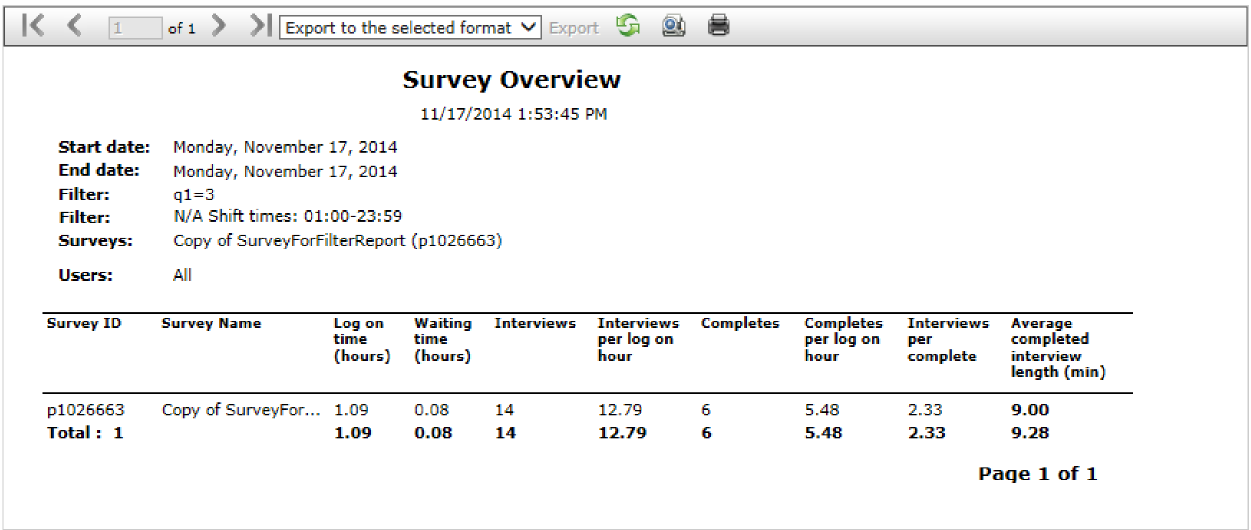


Figure 383 The generated Survey Overview Report

11. The Survey Overview report provides the following information:

ey ID	This is the ID of the Forsta project
ey name	This is the name of the Forsta project
on time	This is the total time (in hours) spent logged into the system during the date range selected
ng time	This is the total time spent waiting for the next interview. In general this is a sum of all time intervals between finish of the previous interview and start of the next interview. In the automatic mode counting starts immediately upon logging in, in the survey assignmer mode counting starts after a survey is selected, in the manual mode counting starts after the first interview is selected.
views	This is the number of interviews conducted during the selected date range
views per log on	This is the number of interviews conducted for this survey per log on hour during the selected date range
pletes	This is the count of interviews that are selected as in the status filter and considered as completes (based on the status filter) during selected date range

pletes per log on	This is the number of interviews with the complete status conducted for this survey per log on hour for the selected date range
views per complete	This is the number of interviews conducted per completed interview
age completed view length (min)	This is the average time (in minutes) for a completed interview

12. If the current report page does not fit into the application window it can be scrolled with the help of the scroll bar displayed on the right side of the frame.

    In case the generated report is large enough and occupies more than one page you can navigate through its pages using the browsing controls displayed above the report header.

    Click the Previous button to jump one page back, click the Next button to jump one page forward.

    Numbers in the drop-down box to the right of these buttons show the current page number and the total number of pages in the report. You can jump to the specified report page – enter the page number in the box field and press Enter on the keyboard to do this.

    Alternatively you can click the Go to First page button and choose to jump to the first report page, or choose the Go to Last page button to jump to the last report page.

13. You can refresh the generated report if the data updates. Click the Refresh button to do it.
14. The generated report can be exported and printed out – refer to Exporting the Generated Report and Printing the Generated Report for instructions.

9.2. Generating the Survey Productivity Report

The Survey Productivity Report provides statistics regarding the work of the selected interviewers. This is a multi-survey report, which means it can be configured to produce statistics for a number of surveys simultaniously. To generate the Survey Productivity Report:

1. Go to **Navigation > Reports** and select **Survey Productivity Report** from the drop-down list.

   Alternatively you can run the report from the All Surveys tab. Choose the All Surveys tab in the Navigation frame, select a survey in the list in the top right frame, right-click this survey and choose **Reports > Survey Productivity Report** from the context menu that appears.

   The Survey Productivity Report settings page appears.

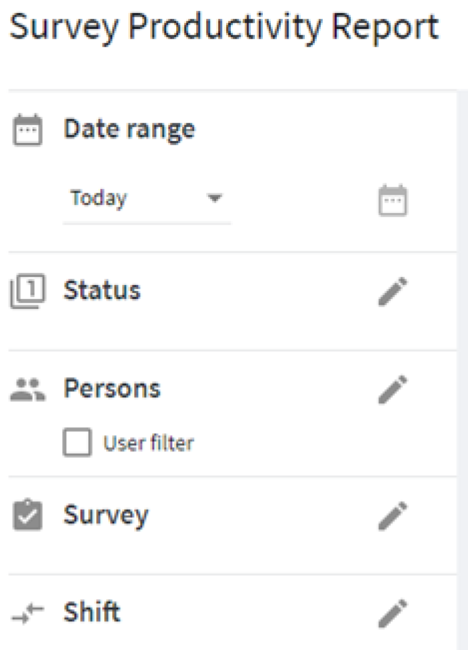


Figure 384 Configuring the Survey Productivity Report

2. Select the survey or a number of surveys for which the report is to be generated.
3. Click **Select** to display the Select Surveys dialog (go to Selecting Surveys for the Survey List Activity View on page 297 for more information).
4. Click **Save selected** in this dialog to save this setting.

   The Date Range drop-down box allows you to select the time period for which the report is to be generated. You can select a period from the drop-down list or you can choose to define the period manually. In the latter case, click the Calendar icon to the right of this field. The Date Range form opens.

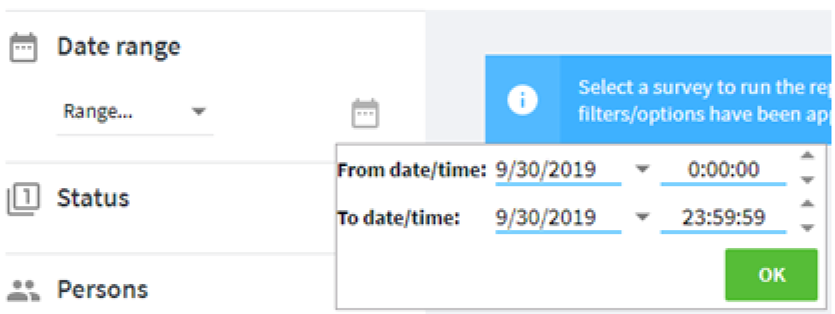


Figure 385 Choosing the date range for the Survey Productivity Report

   Specify the start and finish times for the desired period using the From and To fields. Choosing these fields invokes a calendar form (click the arrow button in the date field). The time spinbox allows you to increment the value, or enter the value manually. Click **OK** to confirm the setting.

   The **Date range** drop-down list contains semi-automatic options for "***n*** days ago". These options allow you to set the date for which the report is to be generated relative to today's date. These options set dates that are 1..7 days before the current date.

5. Click the **Shift** button to limit the time range of the report to specific shifts within a day. If you do not configure this option the report will be generated for all hours within the selected Date range (this is the default setting).

The start and end times of the shift you choose are displayed in the generated report. When you click the **Shift** button, the Select Shift window is displayed.

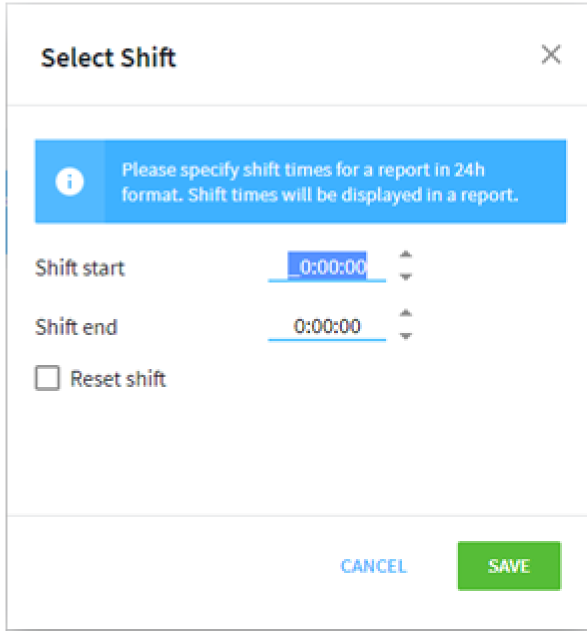


Figure 386 Choosing the Shift start and end times

Choose the desired start and end times of the shift and on completion click **Save**. The window closes and the updated report settings are saved. To view the specified Shift time, hover the mouse cursor over the pencil icon to show a tooltip with the Shift's start and end times.

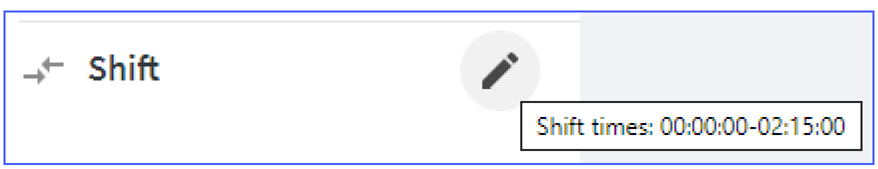


Figure 387 Checking the Shift time setting

If you need to reset the shift values you have specified, click the **Shift** button and check the **Reset shift** box in the dialog, then click **Save**. The shift start and end values are reset to zero (the default value) and the **Shift** button border highlighting is removed.

6. The Status field allows you to select interviews with specific Extended Statuses. Only interviews with the selected statuses will then be included in the report. Click the **Select** button and check the required statuses in the scrollable list that appears. Choose the "Select all" or "Deselect all" option to select or deselect all the available statuses simultaneously. Click **OK** to confirm the setting.

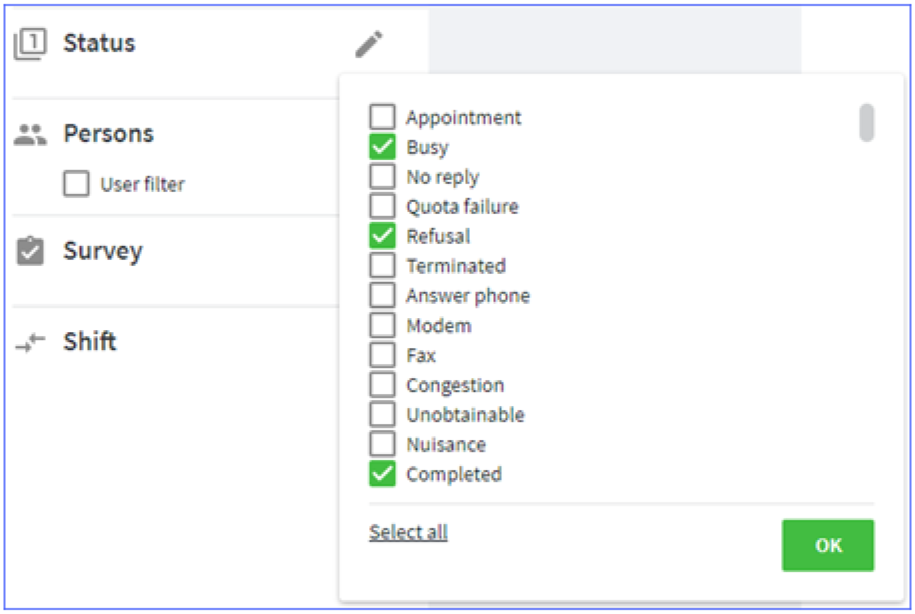


Figure 388 Selecting extended statuses to include into the Survey Productivity Report

7. When no interviewers are selected, the report is generated for all interviewers working for the current company. You can select Interviewers (persons) or Interview Groups for whom this report will be generated. Click the **Select** icon to display the Select Interviewers/Groups window.

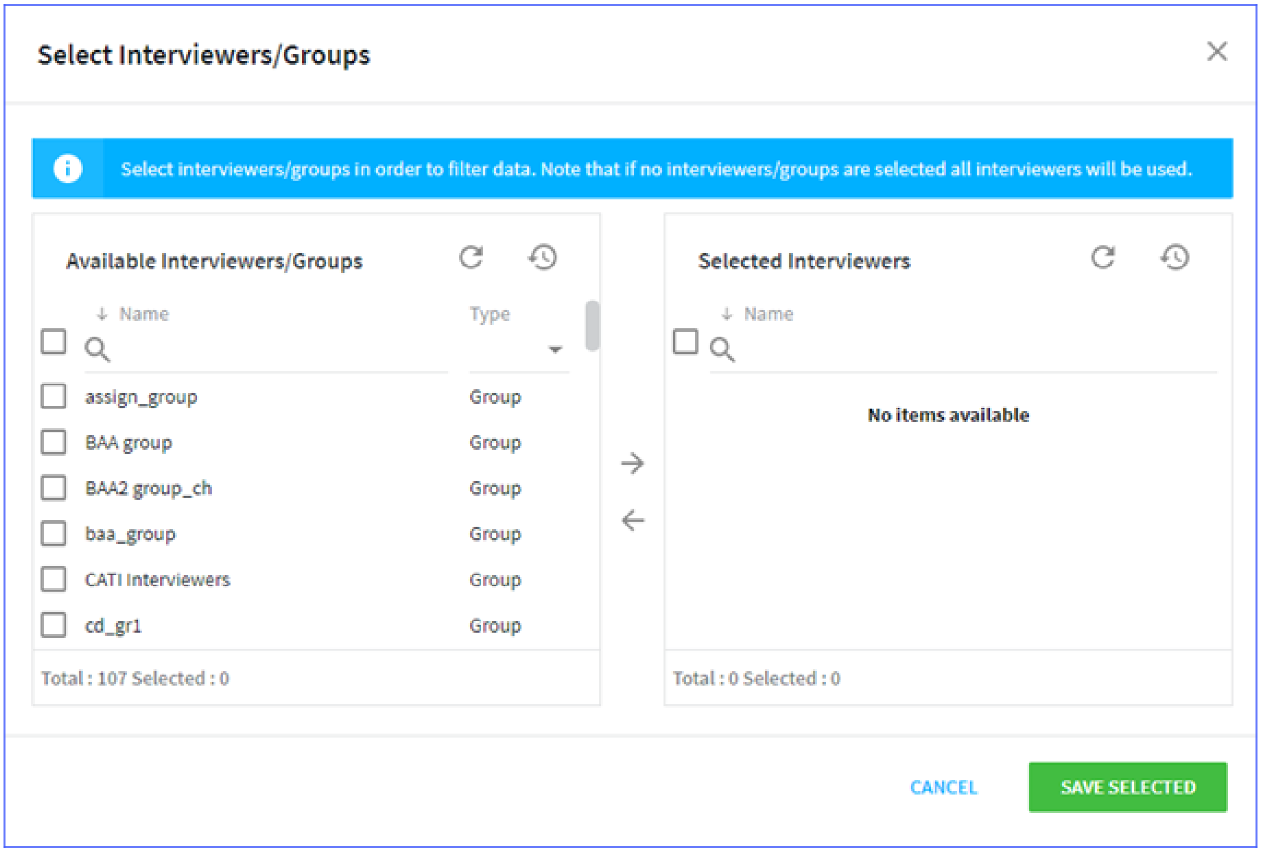


Figure 389 Selecting users to include into the Survey Productivity Report

This dialog is described in (go to Selecting interviewers or interviewer groups on page 395 for more information). Click Save selected in the dialog to save this setting.

8. You can filter the report contents by a survey variable of your choice.

   Note that only variables that have the property "Available as CATI filter" set in the Authoring module will be available and can be applied using the variable filter (refer to the Forsta Authoring manual for instructions on setting up this property).

   To apply a variable as a filter you should choose the Filter drop-down list (see the picture below), then select a variable from this list and finally enter the required variable value in the box to the right of this drop-down list. You can additionally apply the second filter (the drop-down list and the text field located next to the first group of controls).

   When you apply a variable as a filter you create a filtering condition. When you additionally apply another variable you enhance the condition expression - the second variable is added to this expression using the AND operator (like, for example 'q1=2 AND q2=5').

   Note that this filter is available only for reports based on a single survey - if you do not choose a survey when configuring the report, or choose more than one survey, the Filter group of controls will not be available at all.

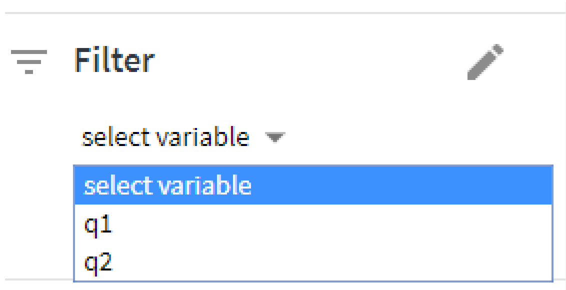


Figure 390 Choosing a variable to filter the Survey Productivity report data

9. Click the Build Report button to generate the Survey Productivity Report.

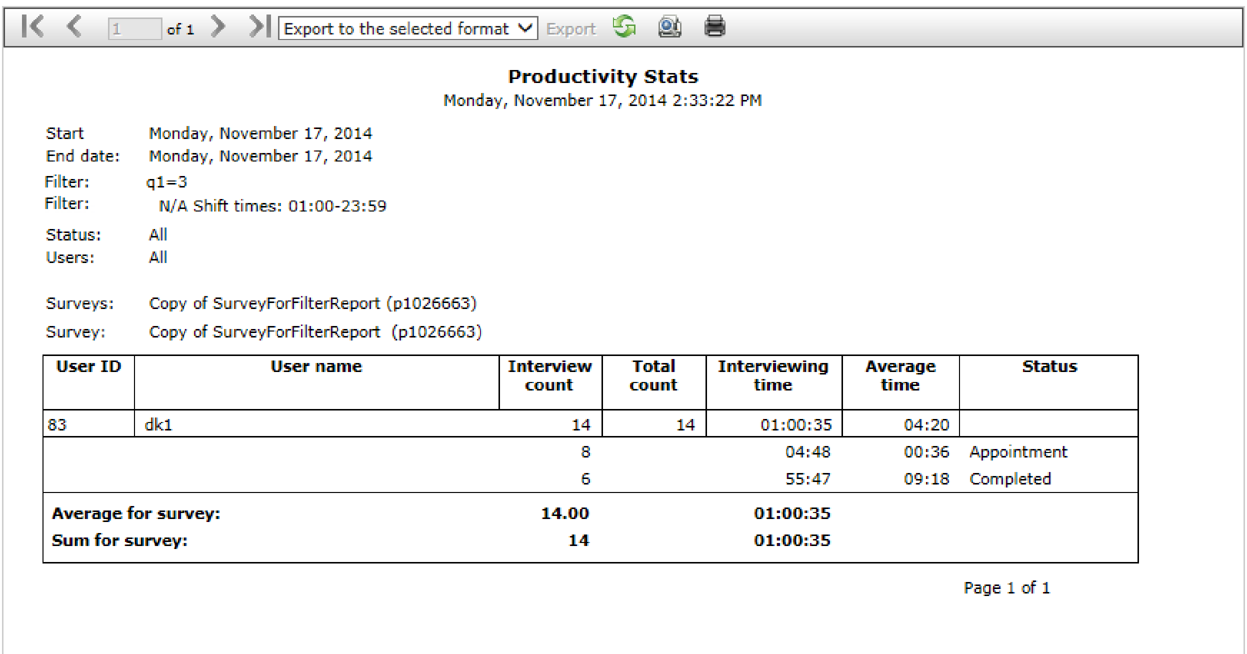


Figure 391 The generated Survey Productivity Report

10. In case the generated report is large enough and occupies more than one page you can navigate through its pages using the browsing controls displayed above the report header.

    If the current report page does not fit into the application window it can be scrolled with the help of the scroll bar displayed on the right side of the frame.

    Click the Previous button to jump one page back, click the Next button to jump one page forward.

    Numbers in the drop-down box to the right of these buttons show the current page number and the total number of pages in the report. You can jump to the specified report page – enter the page number in the box field and press Enter on the keyboard to do this.

    Alternatively you can click the Go to First page button and choose to jump to the first report page, or choose the Go to Last page button to jump to the last report page.

11. You can refresh the generated report if the data updates. Click the Refresh button to do it.

12. The generated report can be exported and printed out – refer to Exporting the Generated Report and Printing the Generated Report for instructions.

9.3. Generating the Interviewer Productivity Report

The Interviewer Productivity Report provides statistics regarding the work of the selected interviewers.

This report is built based on a selected template - the user can choose from a number of report templates that were created/edited by different supervisors, or create/edit a template of his own. A special dialog allows for creation of such a template which is then stored and becomes available (depending on chosen settings) for other supervisors - see (go to Creating and Editing the Interviewer Productivity Report Templates on page 410 for more information) for instructions.

To generate the Interviewer Productivity Report:

1. Choose Reports in the Navigation menu, then choose the Interviewer Productivity Report from the drop-down list that unfolds.

   Alternatively you can run the report from the Surveys tab. Choose the Surveys tab in the Navigation frame, select a survey in the list in the top right frame, right-click this survey and choose Reports/Interviewer Productivity Report from the context menu that appears.

   This will display the Interviewer Productivity Report settings (this dialog opens in the separate window if you run the command from the Surveys list).

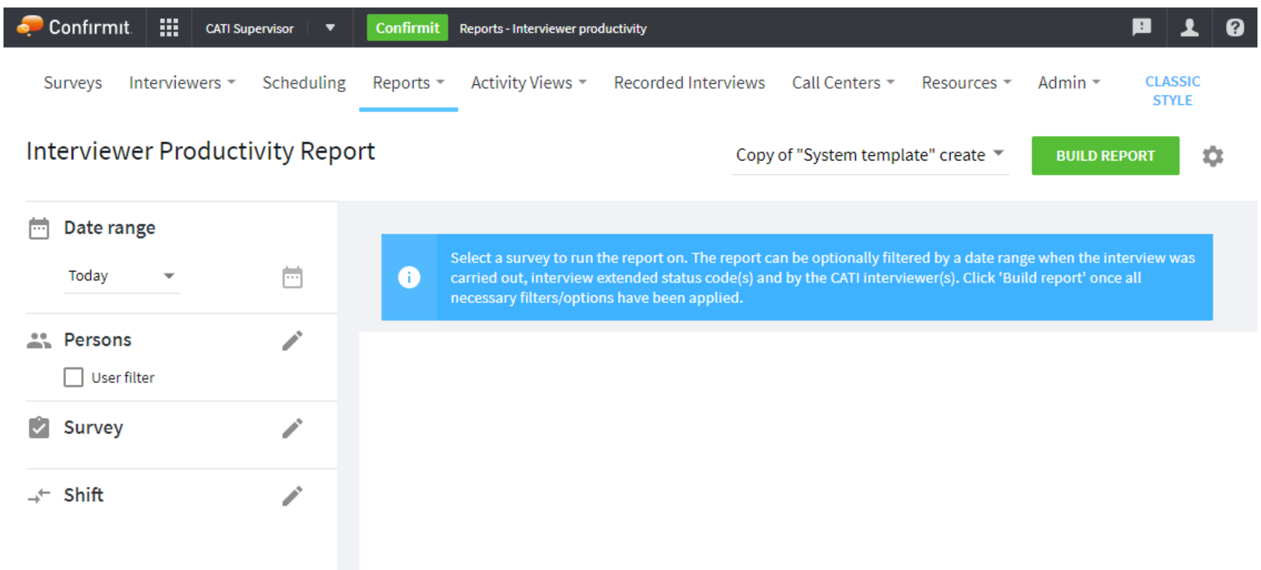


Figure 392 Configuring the Interviewer Productivity Report

2. The Date Range drop-down box allows selecting the time period for which the report should be generated. You can select a period from the drop-down list, or you can choose to define the period manually. - click on the Range icon on the right of this field to do this. Clicking the Range icon will display the Date Range form. Select a single survey (or a number of surveys) for which it will be generated.

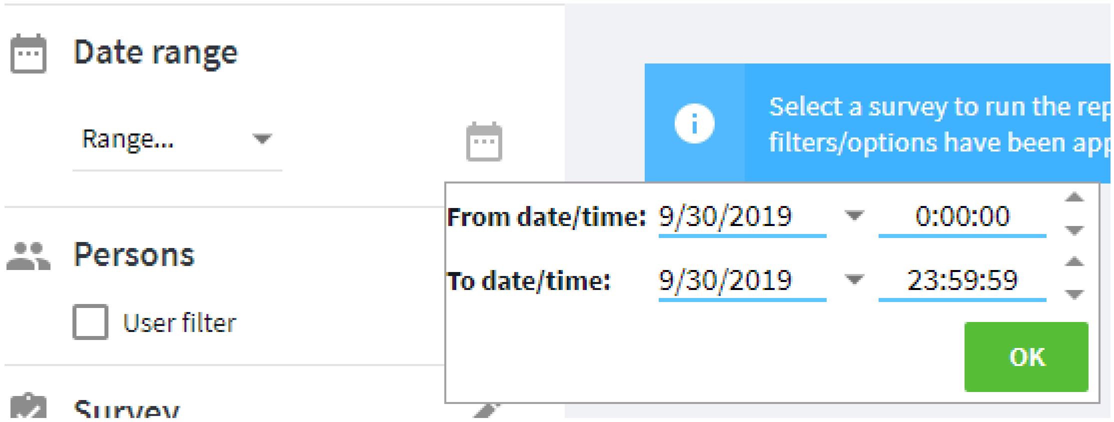


Figure 393 Choosing the date range for the Interviewer Productivity Report

Specify the start and finish time of the desired period using the From and To fields. These fields include the calendar form which opens when you click the arrow button in the date field, and the time spinbox which allows increasing and decreasing value with the help of the buttons, or entering the value manually. Click OK below this list to confirm this setting.

The Dates range drop-down list contains special semi-automatic options - "***n*** days ago". These options allow choosing the date for which the report would be generated automatically, without opening the calendar form. When chosen, each of these options sets a date in the calendar which is 1..7 days before today. For example, if today is May 17, and you choose "2 days ago" from the drop-down list, then May 15 is selected as the report date in the range.

5. When no interviewers are selected the report is generated for all interviewers working for the current company. You can select certain interviewers (users) for whom this report will be generated. Click the Select button for the User filter. This will display the Select Interviewers/Groups dialog.

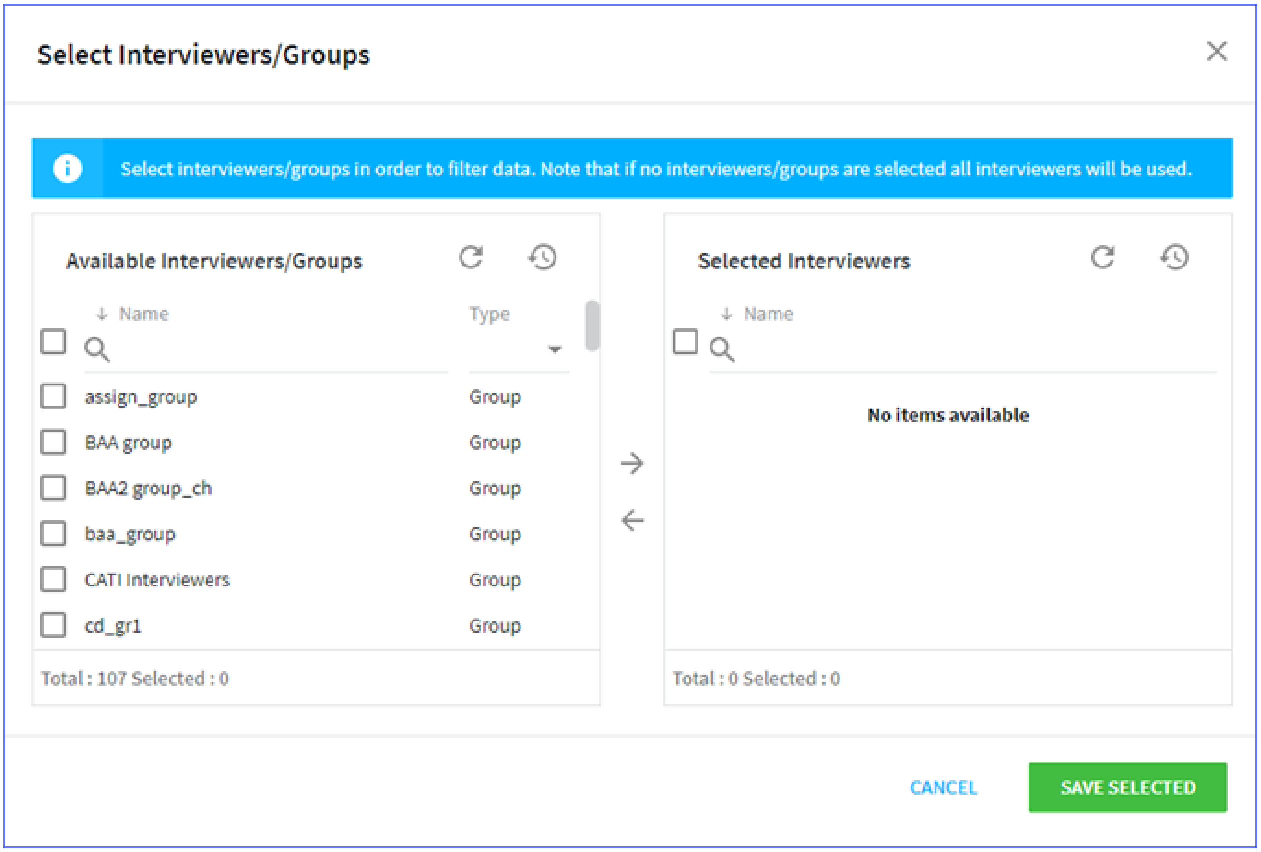


Figure 394 Selecting interviewers to include into the Interviewer Productivity Report

This dialog is described in (go to Selecting interviewers or interviewer groups on page 395 for more information). Click Save selected in this dialog to save this setting.

6. Then choose a survey to include in the report. Choose the Select button to display the Select Surveys dialog (see description of this form here - Selecting Surveys for the Survey List Activity View). Click Save selected in this dialog to save this setting.
7. Click the Shift button to limit a time range of the report to certain shifts within a day. If you skip configuring this option the report will be generated for all hours within the selected Date range - this is the default setting.

   The start and end times of the shift you choose will be displayed in the generated report.

   When you click the Shift button, the Select Shift page is displayed (see the picture below).

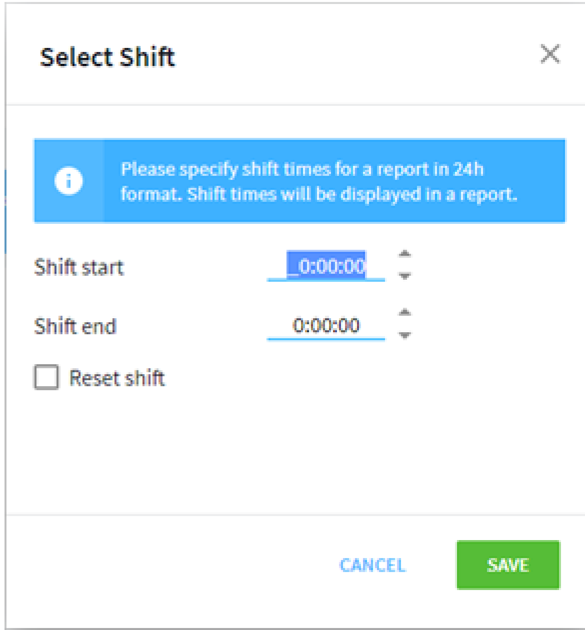


Figure 395 Choosing the Shift start and end times

Choose the desired start and end times of the shift using corresponding spin controls.

Click Save when you are done. The page will close and the updated report settings will be saved. You can check what Shift time was set - hover the mouse cursor over the pencil icon and the tooltip will show the Shift's start and end times (see the picture below).

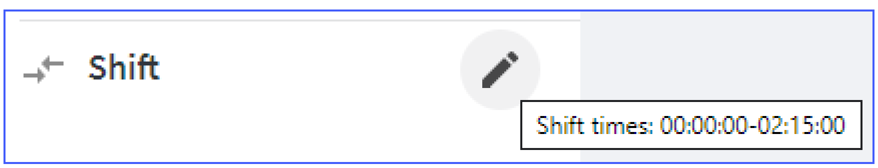


Figure 396 Checking the Shift time setting

If you need to reset shift values you have specified you should check the "Reset shift" box in the page. Then you should click the Save button. The shift start and end values will be reset to zeros (the default value) and the Shift button border highlighting will be removed.

8. You can filter the report contents by a survey variable of your choice.

   This option is available only in the following situations:

a. If the report is generated for a single survey - this survey has got at least one defined variable, or

b. If the report is generated for multiple surveys - all these surveys have got similar variables defined in each one. Otherwise the option remains hidden.

   Note that only variables that have the property "Available as CATI filter" set in the Authoring module become available and can be applied using the variable filter (refer to the Forsta Authoring manual for instructions on setting up this property).

   To apply a variable as a filter you should choose the Filter drop-down list (see the picture below), then select a variable from this list and finally enter the required variable value in the box to the right of this drop-down list. You can additionally apply the second filter (the drop-down list and the text field located next to the first group of controls).

When you apply a variable as a filter you create a filtering condition. When you additionally apply another variable you enhance the condition expression - the second variable is added to this expression using the AND operator (like, for example 'q1=2 AND q2=5').

Note that this filter is available only for reports based on a single survey - if you do not choose a survey when configuring the report, or choose more than one survey, the Filter group of controls will not be available at all.

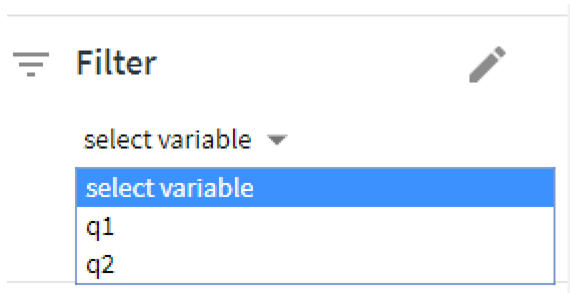
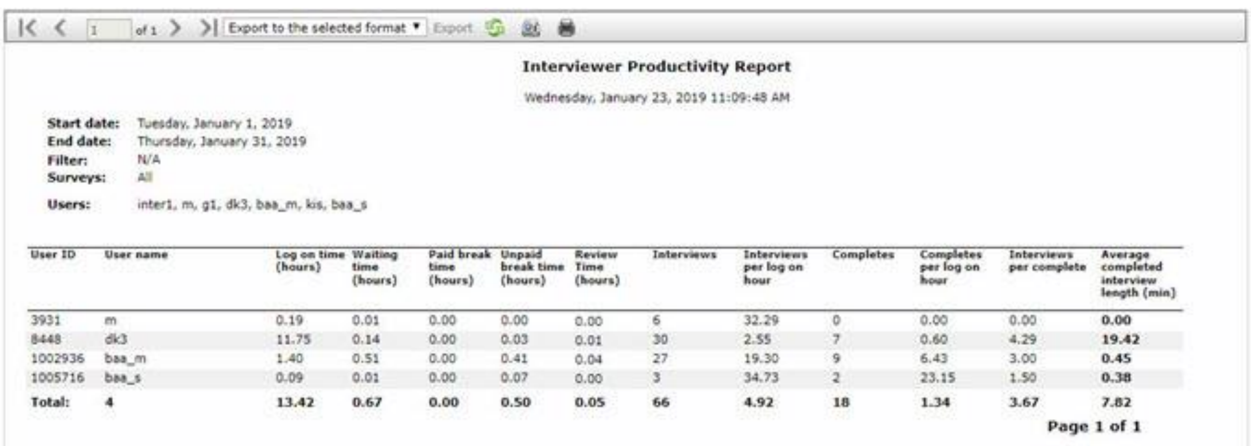


Figure 397 Choosing a variable to filter the Interviewer Productivity report data

9. The rest of the report is configured with the use of a template. Select a template to use from the Template drop-down list (next to the Build button). The System template is selected by default.

   Template configuration includes shifts, extended statuses, dialer attempts, break-time handling, report column settings and public availability status (go to Creating and Editing the Interviewer Productivity Report Templates on page 410 for more information).

10. When all settings are configured click the green Build button to generate the Interviewer Productivity Report.



1 of 1 Export to the selected format Export

Interviewer Productivity Report

Wednesday, January 23, 2019 11:09:48 AM

Start date: Tuesday, January 1, 2019
End date: Thursday, January 31, 2019
Filter: N/A
Surveys: All
Users: inter1, m, g1, dk3, baa_m, kis, baa_s

User ID	User name	Log on time (hours)	Waiting time (hours)	Paid break time (hours)	Unpaid break time (hours)	Review Time (hours)	Interviews	Interviews per log on hour	Completes	Completes per log on hour	Interviews per complete	Average completed interview length (min)
3931	m	0.19	0.01	0.00	0.00	0.00	6	32.29	0	0.00	0.00	**0.00**
8448	dk3	11.75	0.14	0.00	0.03	0.01	30	2.55	7	0.60	4.29	**19.42**
1002936	baa_m	1.40	0.51	0.00	0.41	0.04	27	19.30	9	6.43	3.00	**0.45**
1005716	baa_s	0.09	0.01	0.00	0.07	0.00	3	34.73	2	23.15	1.50	**0.38**
Total:	**4**	**13.42**	**0.67**	**0.00**	**0.50**	**0.05**	**66**	**4.92**	**18**	**1.34**	**3.67**	**7.82**

Page 1 of 1

Figure 398 The generated Interviewer Productivity Report

11. The default Interviewer Productivity Report provides the following information:

User ID	This is the ID of the CATI interviewer
User name	This is the login name for the CATI interviewer
Log on time (hours)	This is the total time (in hours) spent logged into the system during the date range selected
Waiting time (hours)	This is the total time (in hours) spent by the interviewer logged into the system waiting for the next interview to be delivered during the date range selected.

Paid break time (hours)	This is the total time for which payment is provided (in hours) spent on breaks during the date range selected
Unpaid break time (hours)	This is the total time for which payment is not provided (in hours) spent on breaks during the date range selected
Review time (hours)	This is the time spent by the interviewer on reviewing open-end questions
Interviews	This is the number of records worked on during the given date range for the report. All records presented on-screen to interviewers are counted as 'Interviews' (although many of the started interviews are likely to be terminated without going on to become 'completed' interviews). All records dialed in manual or automatic mode will be counted as 'Interviews' regardless of the call outcome. Note that if calls are dialed in predictive mode the 'Interviews' count will not include non-connected call attempts which have automatically coded outcomes like 'no reply' or 'busy'. These calls are not directly attributable to interviewers because they are dialed and coded before needing to be allocated to an interviewer. If the 'Show dialer attempts' setting is enabled before building the report then a row will be added to the top of the report and the 'Interviews' column will provide the total count of numbers dialed (inclusive of non-connected outcomes like 'busy' or 'no reply').
Interviews per log on hour	This is the number of interviews worked on for this survey per logged in hour for the date range specified
Completes	This is the count of interviews that are selected as in the status filter and considered as completes (based on the status filter and selected filter variable(s)) in the date range specified
Completes per log on hour	This is the number of interviews with the complete status worked on for this survey per logged in hour for the date range specified
Interviews per complete	This is the number of interviews worked on per completed interview
Average completed interview length (min)	This is the average time (in minutes) for a completed interview

Break Time statistics

Each time the interviewer goes on a break they enable the break timer in the CATI Interviewer Console (go to Taking a Break on page 270 for more information). To enable the timer they first select the type of break that they intend to take: either paid or unpaid. Totals for these timings are calculated separately. Break types are specified by a supervisor on the Break Classifications tab in the Resources section (go to Configuring the Break Classification on page 362 for more information).

Note that if any type of break is deleted from the Break Classification tab during the period selected for the report generation, all the relevant statistics will be counted as the "paid" type regardless of what type of break has been deleted.

12. In case the generated report is large enough and occupies more than one page you can navigate through its pages using the browsing controls displayed above the report header.

    If the current report page does not fit into the application window it can be scrolled with the help of the scroll bar displayed on the right side of the frame.

    Click the Previous button to jump one page back, click the Next button to jump one page forward.

    Numbers in the drop-down box to the right of these buttons show the current page number and the total number of pages in the report. You can jump to the specified report page – enter the page number in the box field and press Enter on the keyboard to do this.

    Alternatively you can click the Go to First page button and choose to jump to the first report page, or choose the Go to Last page button to jump to the last report page.

13. You can refresh the generated report if the data updates. Click the Refresh button to do it.
14. The generated report can be exported and printed out – refer to Exporting the Generated Report and Printing the Generated Report for instructions.

9.3.1. Creating and Editing the Interviewer Productivity Report Templates

The Interviewer Productivity Report is configured using a template. Template parameters include shifts, extended statuses, dialer attempts, break-time handling, report column settings and public availability status.

Once set, the template configuration can be re-used in any report, thus saving time otherwise required to enter report parameters.

A default template is chosen for you in this list at the start - this is the System template. If you are familiar with templates, choose one from the Template drop-down list in the report toolbar or use the default.

- If you need to change the template settings click the **Manage Customizations** button on the report toolbar. This will display the list of report templates.

Note: The template list opens in the same frame as the report - it replaces the report interface. To return to the report after you have finished configuring a template, choose the "Open report" command in the three-dot action menu in the right column. This action chooses the currently selected template as a basis for the report and displays the report interface in the workspace.

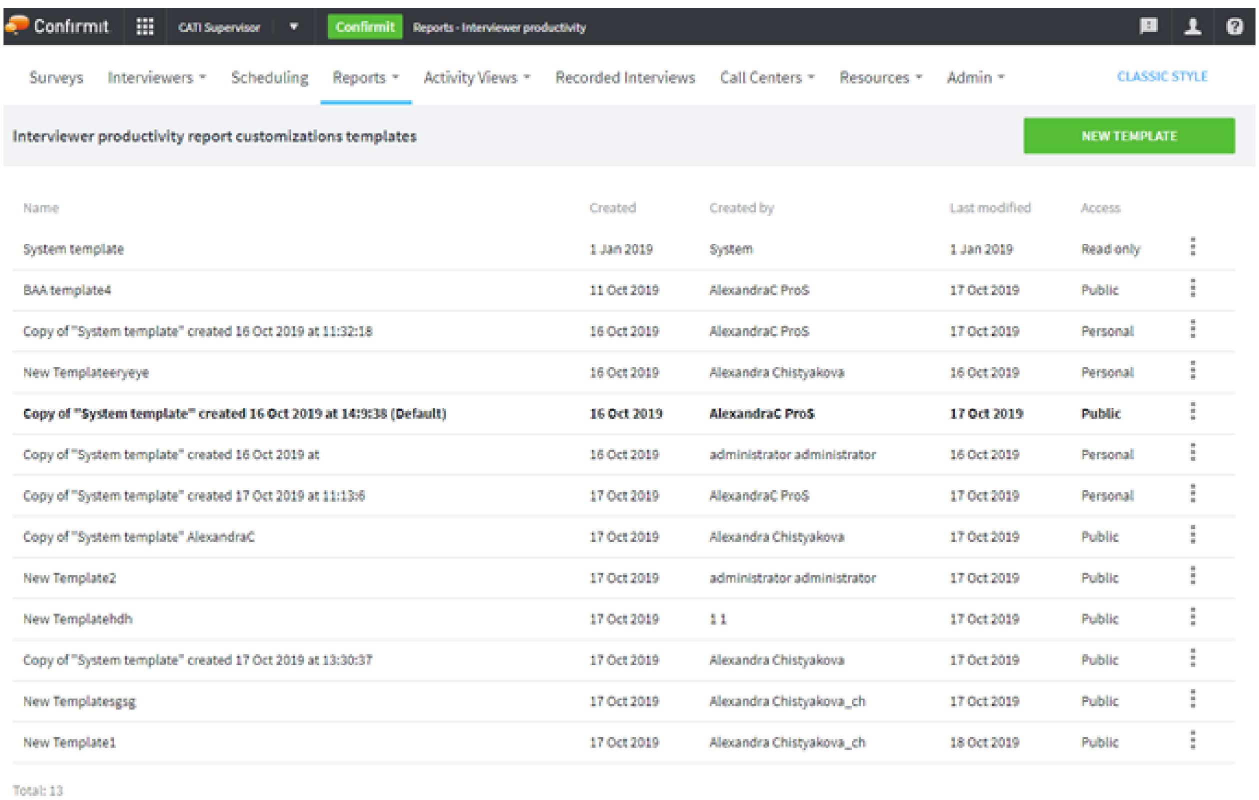


Figure 399 The list of templates that can be used to build the Interviewer Productivity Report

The template list is presented as a grid with the following columns:

- **Name** - template name. May be in **Bold typeface** marked as **(Default)** - means this template will be offered by default to build a report upon;
- **Created** - the date and time the template was created;
- **Created by** - the name of the supervisor who created this template;
- **Last modified** - the date and time the template was last modified;

- **Access** - can be set as Public (available for all supervisors in the company without limitations), Personal (available only for the creating supervisor or an administrator), Read only (the system template available for all supervisors in the company but in the read-only mode, cannot be set by a supervisor).
- A three-dot **action menu** - clicking this menu opens a list of actions the user can perform with the chosen template:
- **Edit** - choosing this command will open the "Edit Report Customizations Template" dialog (see (go to The Edit Report Customizations Template dialog on page 412 for more information));
- **Duplicate** - creates a copy of the selected template and prepends a "Copy of" text to its name;
- **Delete** - deletes the selected template;
- **Set as Default** - sets the selected template as default (this template will be offered by default to build a report upon). The Access setting for the Default template cannot be changed - it is automatically set to Public once the template is set as "Default";
- **Open Report** - opens the report (the one which you left when you have chosen the Manage Customizations button) and sets the selected template for building this report.

The template currently selected as default is highlighted in bold typeface.

Although in most cases it is easiest to start from a duplicate of an existing template, you may wish to create a completely new template. To do this click the **New Template** button on the toolbar. This opens the "Create Report Customizations Template" dialog.

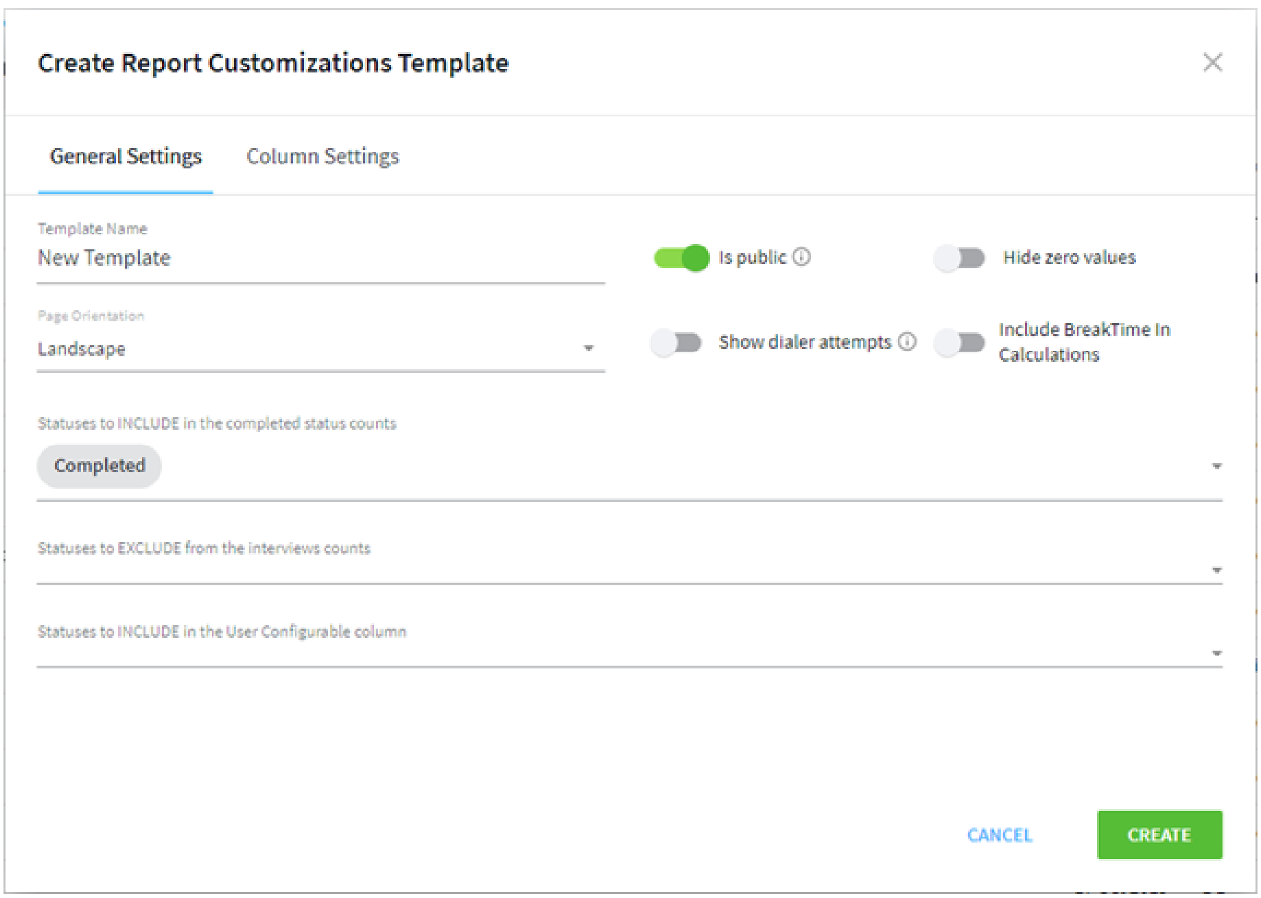


Figure 400 The Create Report Customizations Template dialog

This dialog is similar to the "Edit Report Customizations Template" dialog, only it creates a completely new template. Refer to the instructions below for details.

To edit any template which is available for editing, click the three-dot action menu for that template and then choose the **Edit** command. This opens the "Edit Report Customizations Template" dialog.

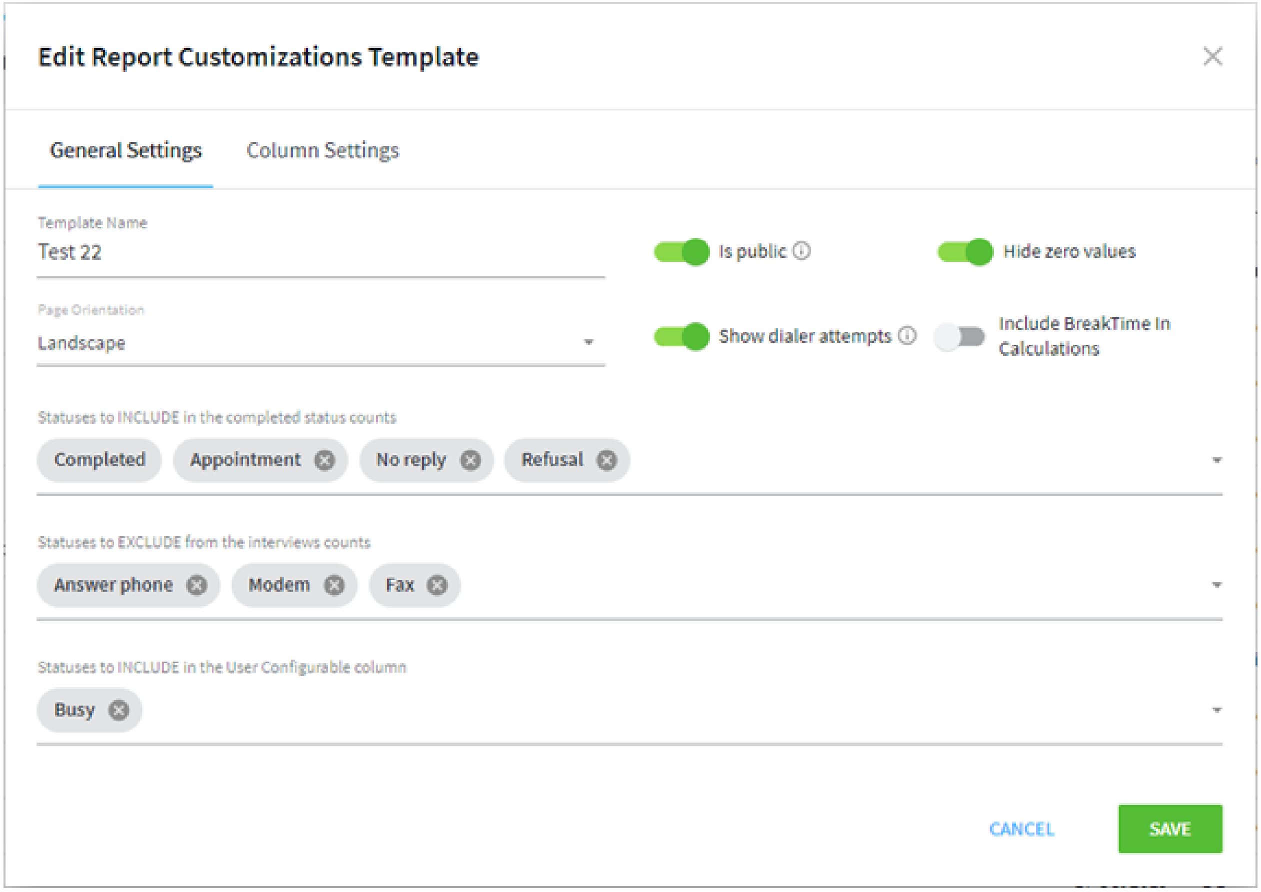


Figure 401 The Edit Report Customizations Template dialog

Start with the **General Settings** tab.

1. Enter the Template Name. Use a meaningful name that will help users to identify it when looking through the template list.
2. Choose the Page Orientation - the "Landscape" option is enabled by default. You can also choose a "Portrait" orientation. A "Landscape" orientation is recommended for reports containing many columns as this will provide more space and improve the chance of the full table fitting onto a single sheet of paper when printed.
3. Configure the Access option - when the "Public" option is turned on (the default) the template becomes available to all supervisors in the company. Otherwise it can be accessed only by a creator and a system administrator.

   You can include additional statistics reflecting the number of times the dialer attempted to connect. This figure is included into the report in case you turn on the "Show dialer attempts" option.
4. You can exclude all interviewers that had never logged in to work with the Interviewer Console during the period selected for the current report. To exclude such "inactive" interviewers you should turn on the "Hide zero values" option.

5. You can add the amount of time spent on breaks to the calculated statistics. To do this enable the “Include break time in calculations” option. When the “Include break time in calculations” option is enabled, "Completes per logged on hour" and "Interviews per logged on hour" statistics will also include break time, otherwise, they will not.

Note: The break time is attributed to each particular survey that the interviewer has been working on during the time period specified for the report (it is not shown as a single total for this interviewer).

6. The “Statuses to INCLUDE…” field makes it possible to configure which extended statuses should be counted as ‘completes’ for the purpose of the report. Click the arrow button on the right to open a drop-down list and choose the required statuses in the scrollable list that appears. Only one status at a time can be added - repeat the procedure to add more statuses. To remove an added status click the crossed icon near its name. See the picture below for illustration.

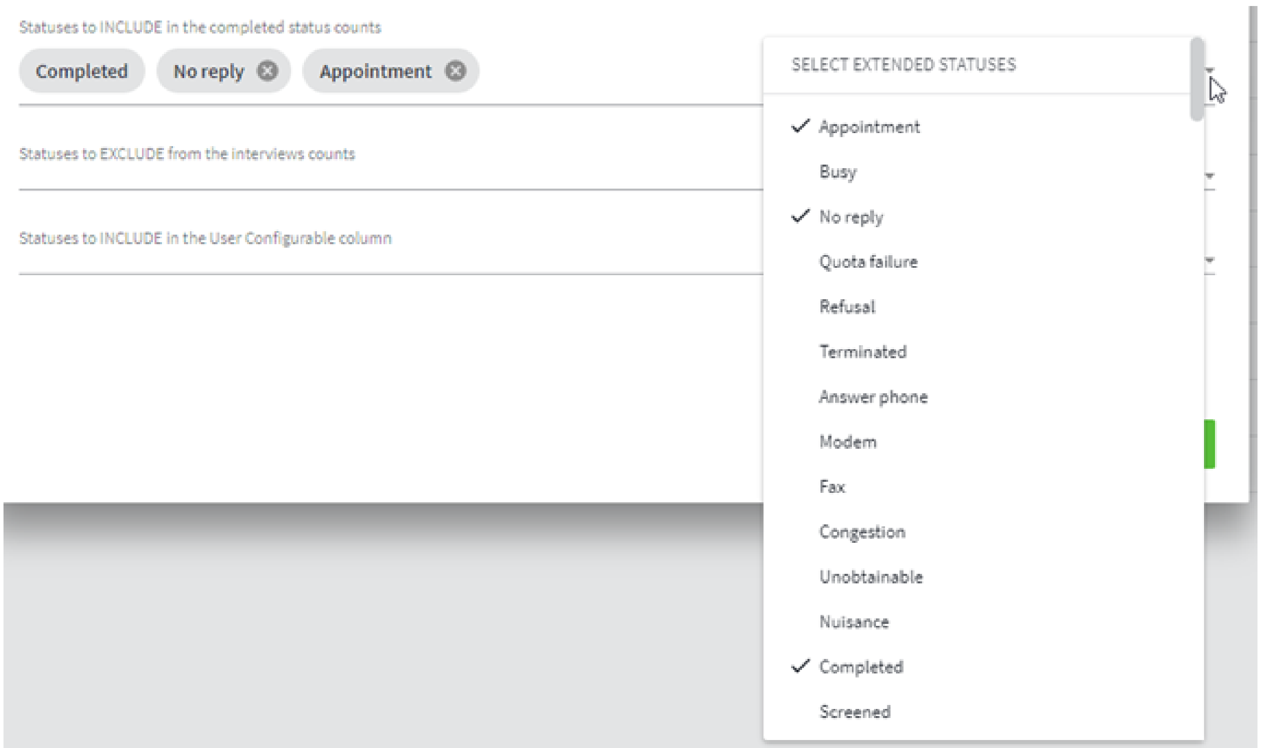


Figure 402 Selecting extended statuses to be used "completes" in the report

The “Statuses to EXCLUDE…” field makes it possible to configure which extended statuses should NOT be counted as ‘Interviews’ (connected calls) in the report. This may be useful if you wish to exclude statuses like ‘answer phone’ or other status types which the interviewer cannot convert to a completed interview.

The "Statuses to INCLUDE in the user configurable column" field makes it possible to add an additional column to the report which gives a combined count totalling all extended statuses the user chooses. Note that this column assumes a default title of ‘User Configurable’ but can be relabeled once it has be selected as a column to include in the report.

7. Proceed to the **Column Settings** tab.

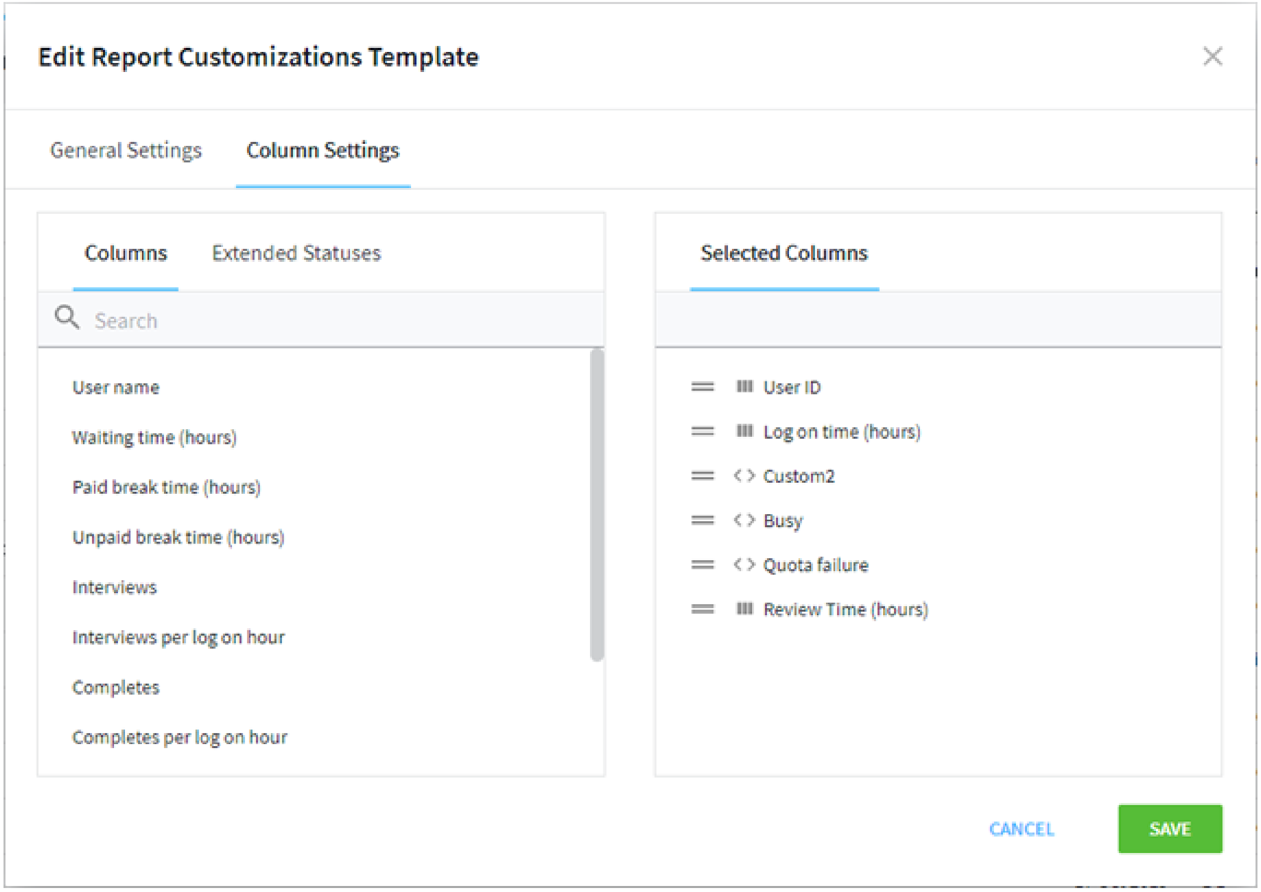


Figure 403

Here you can configure the layout of the report by adding/removing columns and counts of interviews with certain extended statuses to the report. Also this tab makes it possible to change the order of columns in the report.

To add additional columns to show the counts for selected extended statuses choose the Extended Statuses tab and then move the desired columns into the Selected Columns pane. This can be achieved by clicking on the plus button which appears when hovering the mouse on a status label or by simply dragging and dropping into the right pane.

Bear in mind that if you do not add the "User ID" column the report will be compiled but it will contain no total figures since the system will be unaware for which user(s) the totals should be calculated.

Change to the Extended Statuses tab in the left pane and repeat the procedure to add extended statuses to the Selected Columns pane.

Columns are marked in the Selected Columns list as follows: a column is marked , and an extended status . You can change the order of columns and statuses in the report - drag any column or status name up or down the list and drop it at the desired position. The name is highlighted as you drag it. The leftmost column is at the top of the list and the rightmost is at the bottom. It is possible to adjust the column labels that will be used at the top of the report, to do this simply click on the pencil icon (seen when hovering the mouse over any field name in the Selected Columns pane).

9.4. Generating the Interviewer Sessions Report

The Interviewer Sessions Report is a log listing all events in which interviewers belonging to the current company participated over the selected period of time. There are two event types: a working session and a break.

Normally the working session starts when the interviewer logs in to work with the CATI Interviewer Console and ends when they log out either by themselves, or when they are logged out automatically by the system, or when the supervisor logs the interviewer out manually.

Regarding the break duration, it equals the value displayed in the counter shown in the CATI Interviewer Console, starts at the moment the Console enters the Break mode, ends when the Console exits the Break mode and either switches to the working mode, or logs the interviewer out. For more information regarding the interviewer breaks refer to (go to Interviewer on a Break on page 272 for more information).

The Interviewer Sessions report contains the following data displayed in columns:

- Interviewer - the login name of the interviewer;
- Start time (local timezone) - the start date and time of the event (in the interviewer's time zone);
- End time (local timezone) - the end date and time of the event (in the interviewer's time zone);
- Duration (hh:mm:ss) - the duration of the event in hours, minutes and seconds;
- Event - the type of the event, either a break, or a working session.

After the Interviewer Sessions report is generated and displayed, the supervisor can filter the report contents by any column shown in this report.

To generate the Interviewer Sessions report:

1. Choose Reports in the Navigation menu, then choose the Interviewer Sessions Report from the drop-down list that unfolds.

   This will display the Interviewer Sessions report in the CATI Supervisor window.

   By default the Interviewer Sessions report displays the list of events for all interviewers logged in during the current day - "Today" option is selected in the Date column. The picture below shows the Interviewer Sessions report generated for the current day.

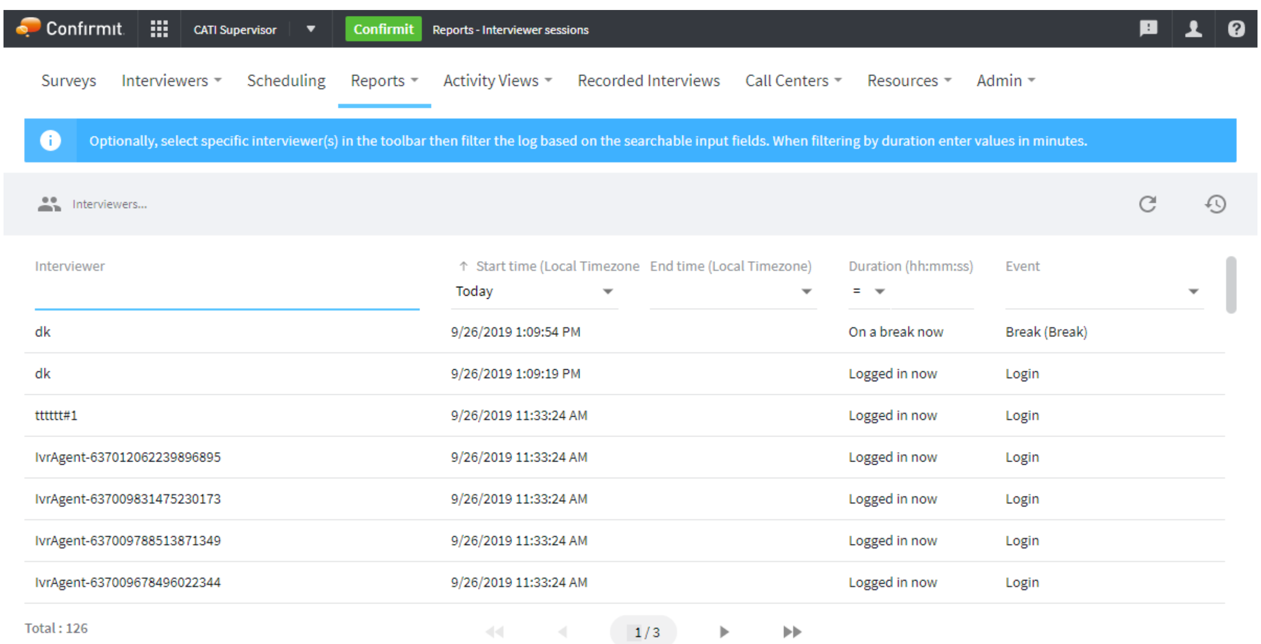
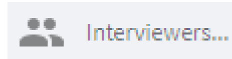


Figure 404 Interviewer Sessions report generated for the current day

2. By default the report is generated for all interviewers working for the current company.

   Optionally you can choose to generate the report for selected interviewers only.

To select interviewers click the Interviewers button 

on the toolbar. This will display the Select Interviewers/Groups page.

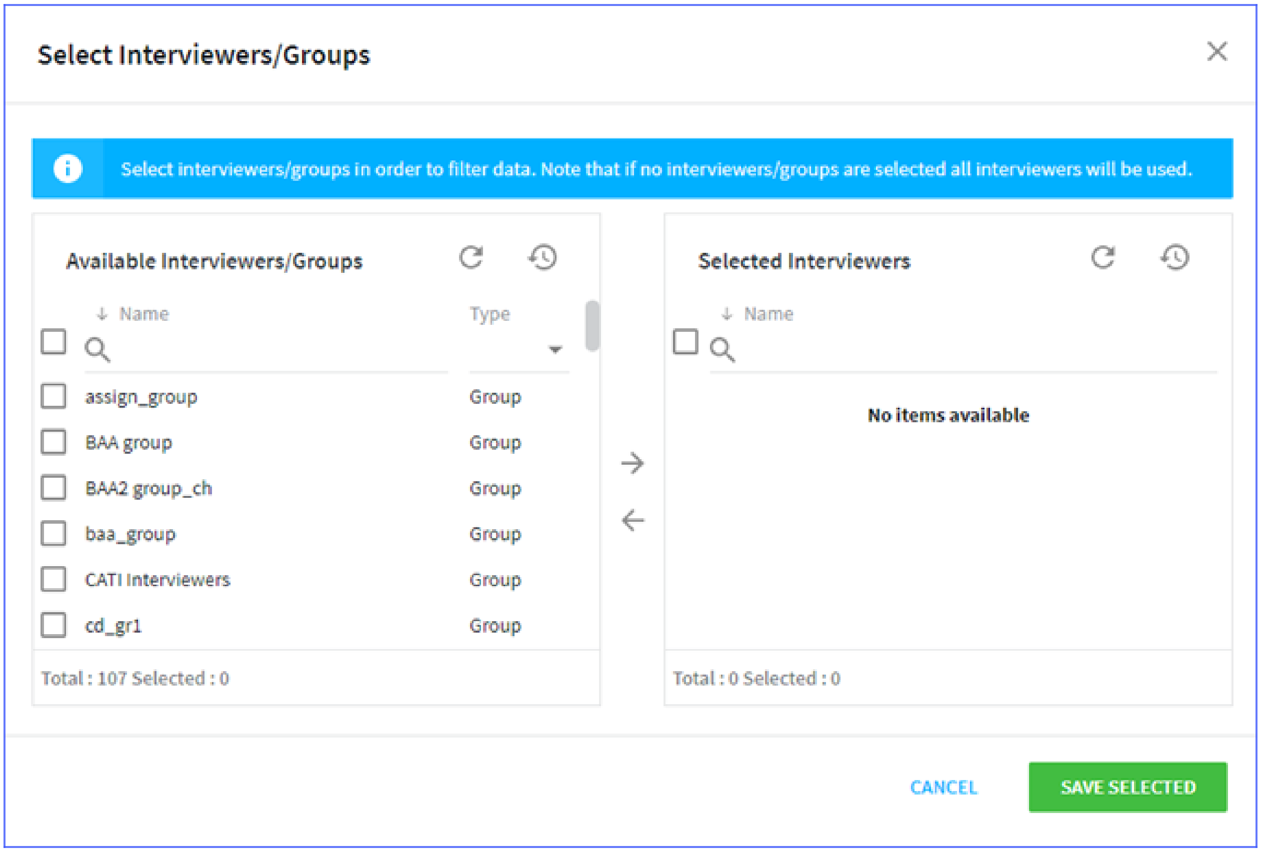


Figure 405 Selecting interviewers to include in the Interviewer Sessions report

This dialog is described in (go to Selecting interviewers or interviewer groups on page 395 for more information). Click Save selected in this dialog to save this setting.

3. You can filter a report by events that started during a certain day, or during a certain period, and ended during a certain day, or during a certain period. These days and periods are selected from the drop-down list in the Start time and End time column headers. All available days and periods are fixed - you cannot use a free date range.

4. You can filter the report by interviewers and/or by break duration values.

   Note that the filter field in the Duration column header accepts only integer values - enter the value in whole minutes only.

5. To generate a report using filters you should first enter, or select the filter value in the column header, and then press Enter or the Refresh button in the frame toolbar. The frame contents are updated, and the report is re-generated based on the provided filter values.

   You should click the Refresh button every time you change value of any filter to update the report contents.

6. You can clear all the selected filters by pressing the Clear button in the frame toolbar. Pressing the Clear button sets the default values for all filters ("Today" value for the Start time, and empty values for all other filters) including the Interviewers filter.

   Filters are reset when the button is pressed - the frame contents are refreshed and the report is updated.

9.5. Generating the Quota Progress Report

The Quota Progress Report provides a 7 day retrospective breakdown of completed calls for a chosen quota.

This single-survey report provides quota achieved figures for each of the seven days prior to the target date including an average value and achieved figures for the target date.

To generate the Quota Progress Report:

1. Choose Reports in the Navigation menu, then choose the Quota Progress Report from the drop-down list that unfolds.

   Alternatively you can run the report from the Surveys tab. Choose the Surveys tab in the Navigation frame, select a survey in the list in the top right frame, right-click this survey and choose Reports/Quota Progress from the context menu that appears.

   This will display the Quota Progress Report settings (this dialog opens in the separate window if you run the command from the Surveys list).

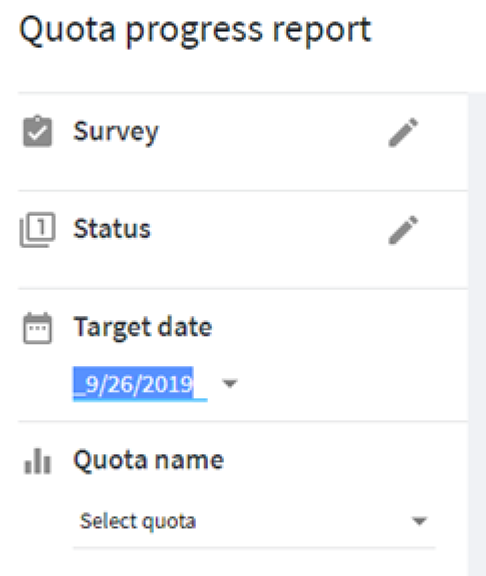


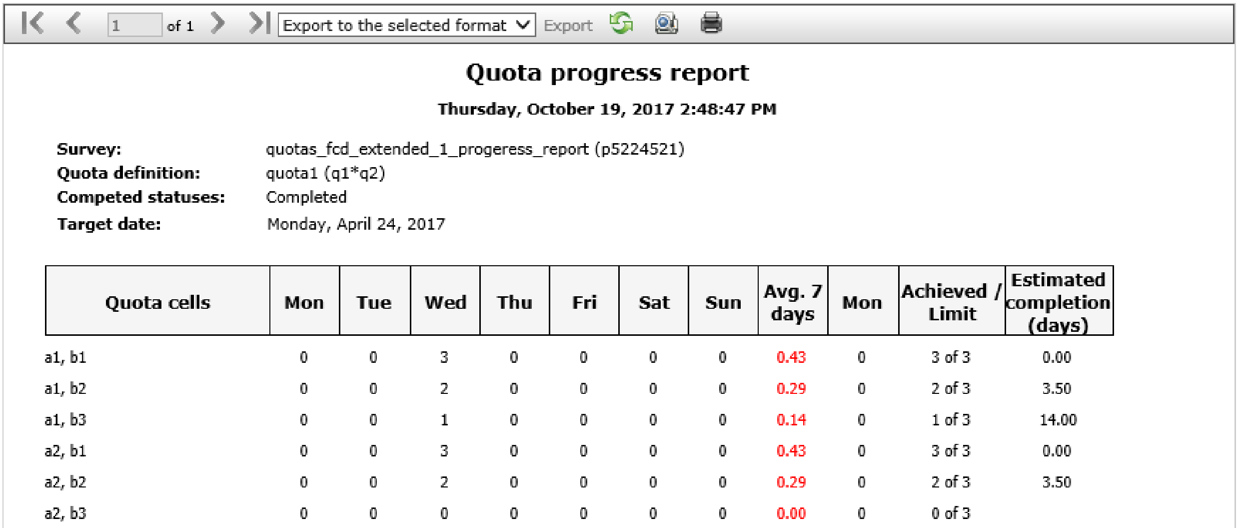
Figure 406 The Quota Progress report settings

2. Select a single survey (or a number of surveys) for which the report will be generated. Click the Select button (Survey) to display the Select Surveys dialog (see description of this form here - (go to Click the Surveys button on the toolbar. on page 297 for more information)). Click Save selected in this dialog to save this setting.
3. Using the Quota Name drop-down list choose a quota from those specified for the survey selected on the previous step.

   The Quota Progress report will show statistics calculated for the cells that were used to specify this quota. These figures will be calculated for a week preceding the Target date - see the next step.
4. Choose a target date for the report by using calendar form in the Target date field. This is a date from which one week will be counted back. The generated report will show figures for each date of this preceding week.
5. You can optionally specify certain extended statuses to be treated as "Completed". By default only interviews with the Completed extended status are included in the Quota Progress report.

   Click the Select button and check the required statuses in the scrollable list that appears. Click OK below this list to confirm this setting. To select or deselect all the available statuses at once choose the "Select all" or "Deselect all" option under the scrollable list.

6. Click the Build Report button to generate the Quota Progress Report. The picture below shows an example of the calculated Quota Progress report.



Quota progress report

Thursday, October 19, 2017 2:48:47 PM

Survey: quotas_fcd_extended_1_progeress_report (p5224521)
Quota definition: quota1 (q1*q2)
Competed statuses: Completed
Target date: Monday, April 24, 2017

Quota cells	Mon	Tue	Wed	Thu	Fri	Sat	Sun	Avg. 7 days	Mon	Achieved / Limit	Estimated completion (days)
a1, b1	0	0	3	0	0	0	0	0.43	0	3 of 3	0.00
a1, b2	0	0	2	0	0	0	0	0.29	0	2 of 3	3.50
a1, b3	0	0	1	0	0	0	0	0.14	0	1 of 3	14.00
a2, b1	0	0	3	0	0	0	0	0.43	0	3 of 3	0.00
a2, b2	0	0	2	0	0	0	0	0.29	0	2 of 3	3.50
a2, b3	0	0	0	0	0	0	0	0.00	0	0 of 3	

Figure 407 The Quota Progress Report

7. The leftmost column in the report table shows question codes that were used to specify the quota. Question codes appear exactly in the way they are specified in the survey.

   For each quota cell the "Achieved / Limit" column provides currently achieved result as compared to the target limit value.

   Also the last column contains estimation of how long will it take (in days) to complete the quota if the current progression remains the same.

8. You can also generate the Quota Progress Report from the Quotas tab of the Survey view (see (go to Viewing and Modifying Survey Quota Settings on page 76 for more information)). The Quota Progress Report generated in this way will provide statistics for the currently viewed survey and selected quota for the current date.

   To do this, while in the Surveys menu, select the required survey in the bottom right frame, change to the Quotas tab and click the Quota Progress Report button on the frame toolbar.

9. If the current report page does not fit into the application window it can be scrolled with the help of the scroll bar displayed on the right side of the frame.

   In case the generated report is large enough and occupies more than one page you can navigate through its pages using the browsing controls displayed above the report header.

   Click the Previous button to jump one page back, click the Next button to jump one page forward.

   Numbers in the drop-down box to the right of these buttons show the current page number and the total number of pages in the report. You can jump to the specified report page – enter the page number in the box field and press Enter on the keyboard to do this.

   Alternatively you can click the Go to First page button and choose to jump to the first report page, or choose the Go to Last page button to jump to the last report page.

10. You can refresh the generated report if the data updates. Click the Refresh button to do it.

11. The generated report can be exported and printed out – refer to Exporting the Generated Report and Printing the Generated Report for instructions.

9.6. Generating the Sample Status Summary Report

The Sample Status Summary Report provides statistics regarding extended statuses of the interviews selected from the particular sample.

To generate the Sample Status Summary Report:

1. Choose Reports in the Navigation menu, then choose the Sample Status Summary Report from the drop-down list that unfolds.

   This will display the Sample Status Summary Report settings (this dialog opens in the separate window if you run the command from the Surveys list).

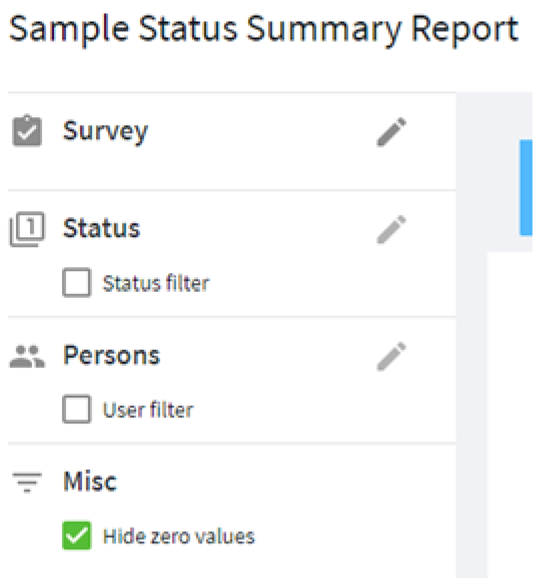


Figure 408 Configuring the Sample Status Summary Report

2. Select a single survey (or a number of surveys) for which it will be generated. Click the Select button to display the Select Surveys dialog (see description of this dialog here - Selecting Surveys for the Survey List Activity View). Click OK in this dialog to save this setting.
3. Next you can choose to apply the Status filter option. Check this box to activate the Select button. Click it to display the Status filter form.

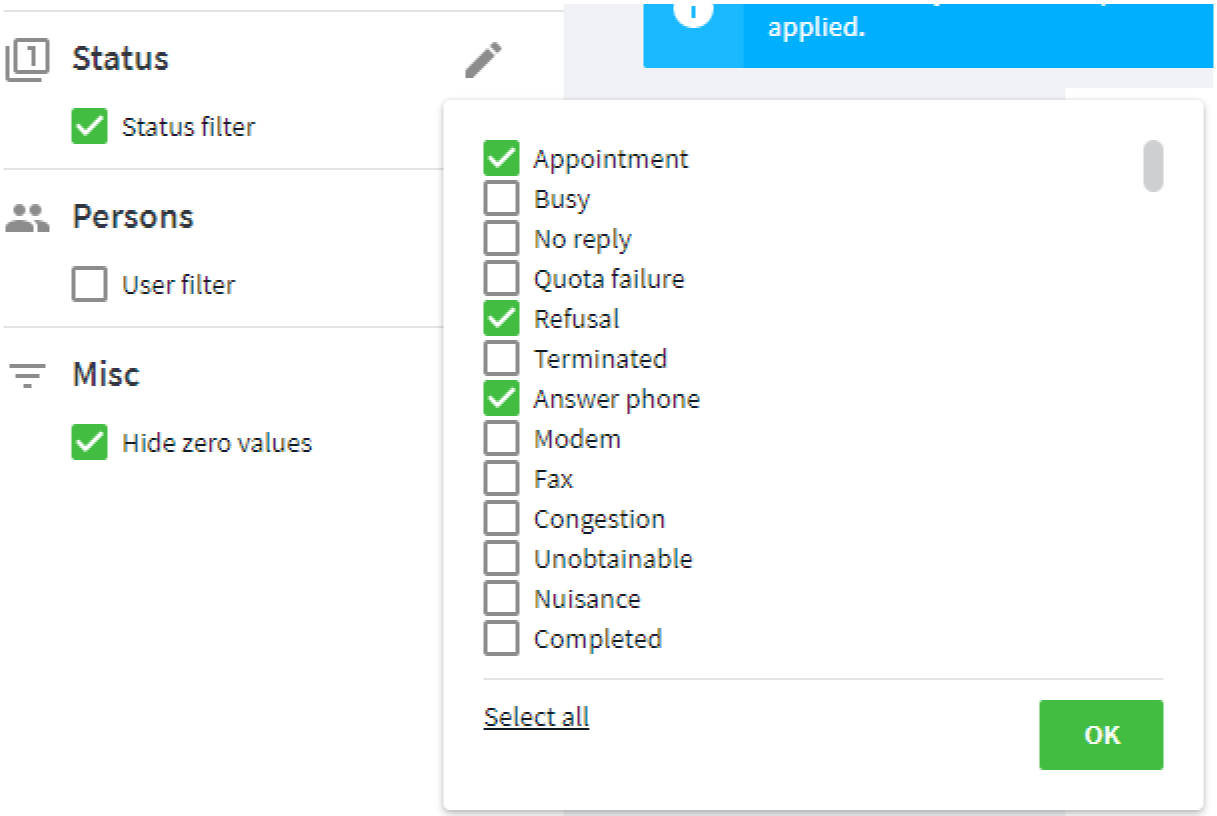


Figure 409 Applying extended status filter to the Sample Status Summary Report

Put a check in front of extended statuses you want to include in the Sample Status Summary Report. Click OK to save this setting.

4. Check the Hide zero statuses box to apply this option. If there are no interviews in some extended status, this status will automatically be excluded from the report.

5. Check the User filter option to select interviewers for inclusion into the Sample Status Summary Report.

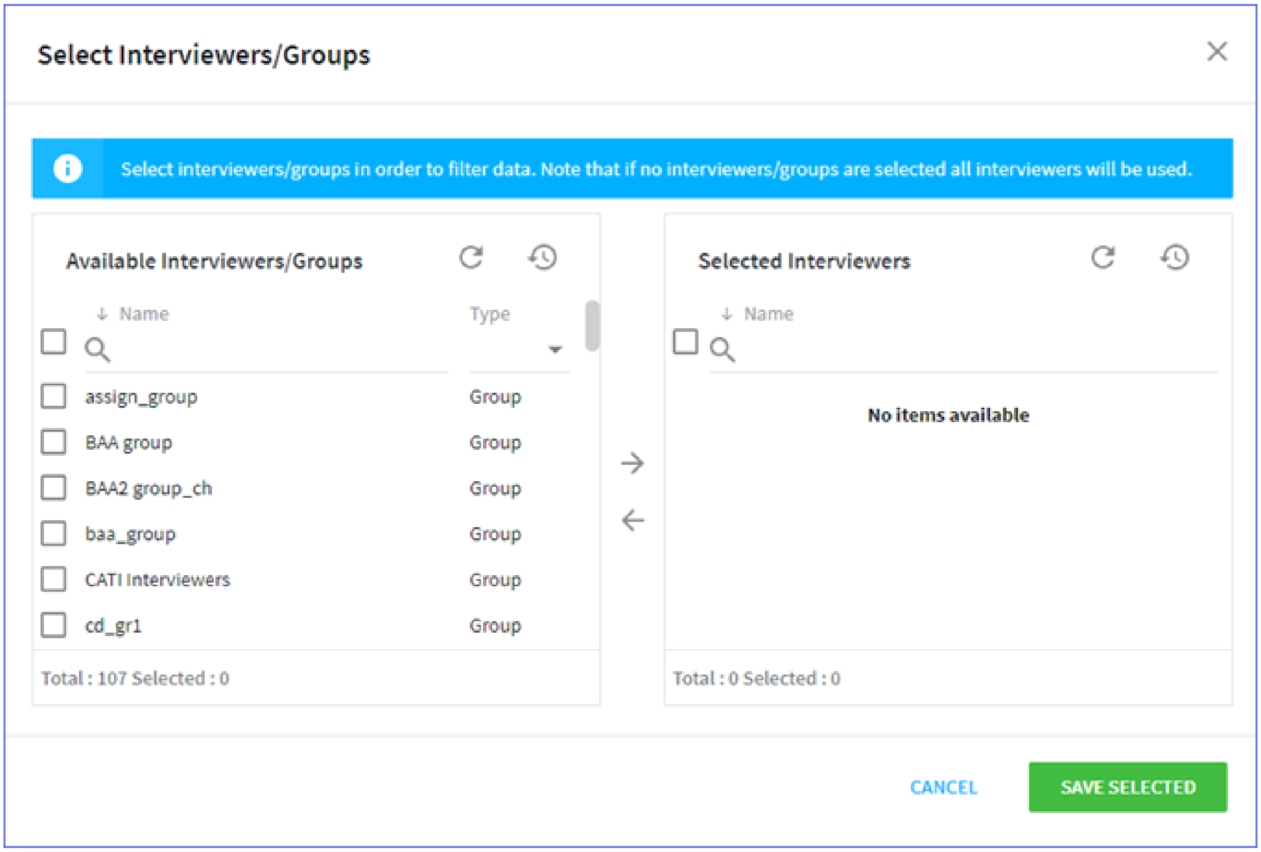


Figure 410 Applying the user filter to the Sample Status Summary Report

This dialog assumes using the same technique as it is used to make a choice in the Select Surveys dialog described in Selecting Surveys for the Survey List Activity View (also see step 3 above). Click Save selected in this dialog to save this setting.

6. Click the Build Report button to generate the Sample Status Summary Report.

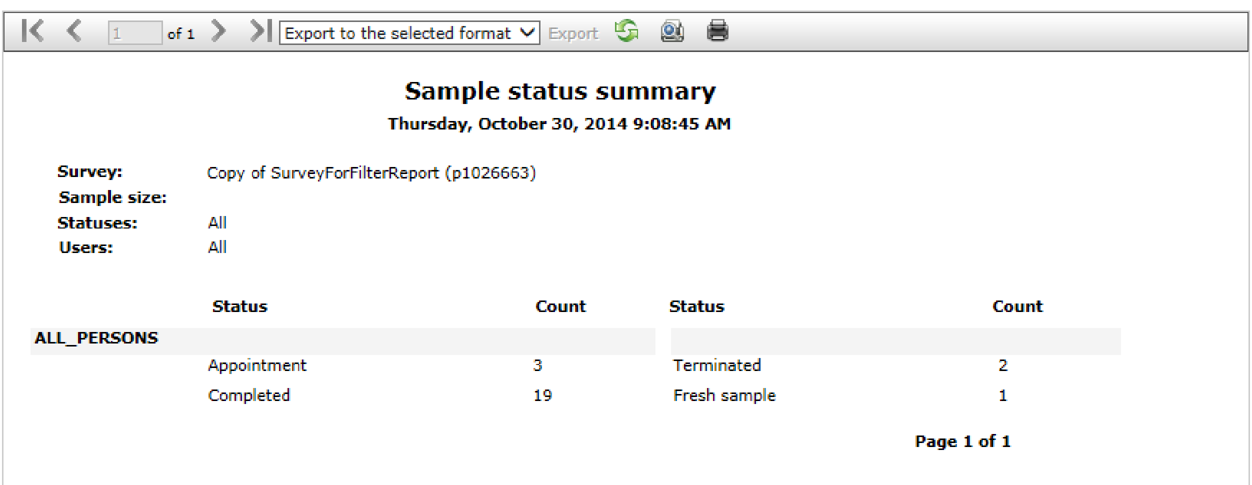


Figure 411 The generated Sample Status Summary Report

7. In case the generated report is large enough and occupies more than one page you can navigate through its pages using the browsing controls displayed above the report header.

   If the current report page does not fit into the application window it can be scrolled with the help of the scroll bar displayed on the right side of the frame.

   Click the Previous button to jump one page back, click the Next button to jump one page forward.

   Numbers in the drop-down box to the right of these buttons show the current page number and the total number of pages in the report. You can jump to the specified report page – enter the page number in the box field and press Enter on the keyboard to do this.

   Alternatively you can click the Go to First page button and choose to jump to the first report page, or choose the Go to Last page button to jump to the last report page.

8. You can refresh the generated report if the data updates. Click the Refresh button to do it.
9. The generated report can be exported and printed out – refer to Exporting the Generated Report and Printing the Generated Report for instructions.

9.7. Generating the Sample Status Summary by Question Report

The Sample Status Summary by Question Report shows count of sample records for different extended statuses broken down by a selected question.

This is a single-survey report and only one survey can be chosen at a time.

To generate the Sample Status Summary by Question Report :

1. Choose Reports in the Navigation menu, then choose the Sample Status Summary by Question Report from the drop-down list that unfolds.

   This will display the report settings (this dialog opens in the separate window if you run the command from the Surveys list).

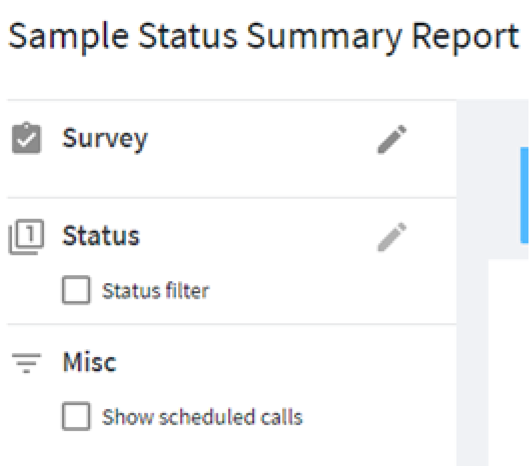


Figure 412 Selecting a survey to build a Sample Status Summary by Question Report

2. Click the Select button to display the Select Surveys dialog (see description of this form here - Selecting Surveys for the Survey List Activity View). Click OK in this dialog to save this setting.

   After a survey is selected the settings will include additional controls which you can use to configure the report (see the picture below).

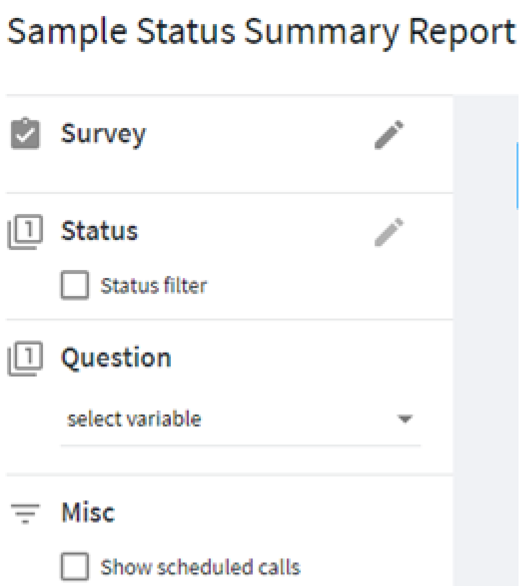


Figure 413 The complete Sample Status Summary by Question Report configuration set

3. Next you can choose to apply the Status filter option. Check this box to activate the Select button. Click it to display the Status filter form.

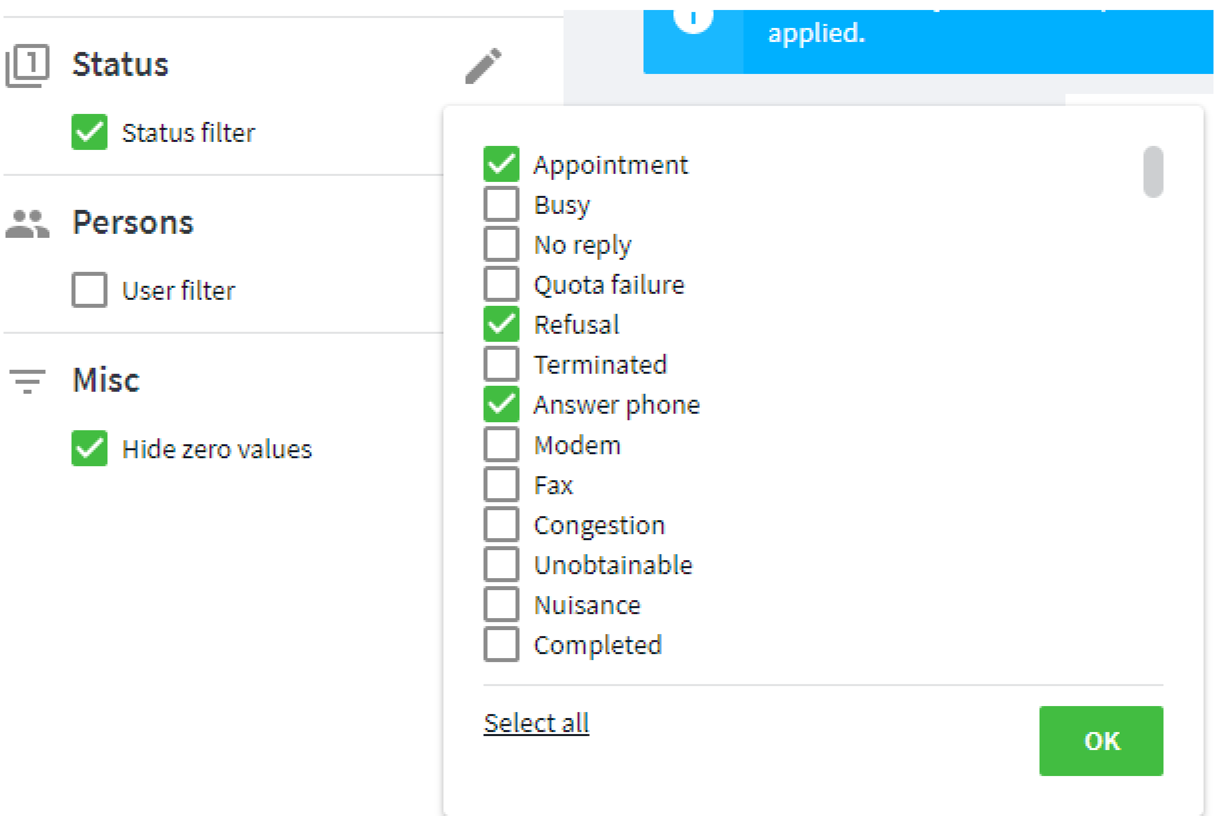


Figure 414 Applying extended status filter to the Sample Status Summary by Question Report

Put a check in front of extended statuses you want to include in the report. Click OK to save this setting.

4. Next you can start building the report. Click the Build Report button to generate the Sample Status Summary by Question Report.

   Additional report configuration options are available - they are described later on in this topic.

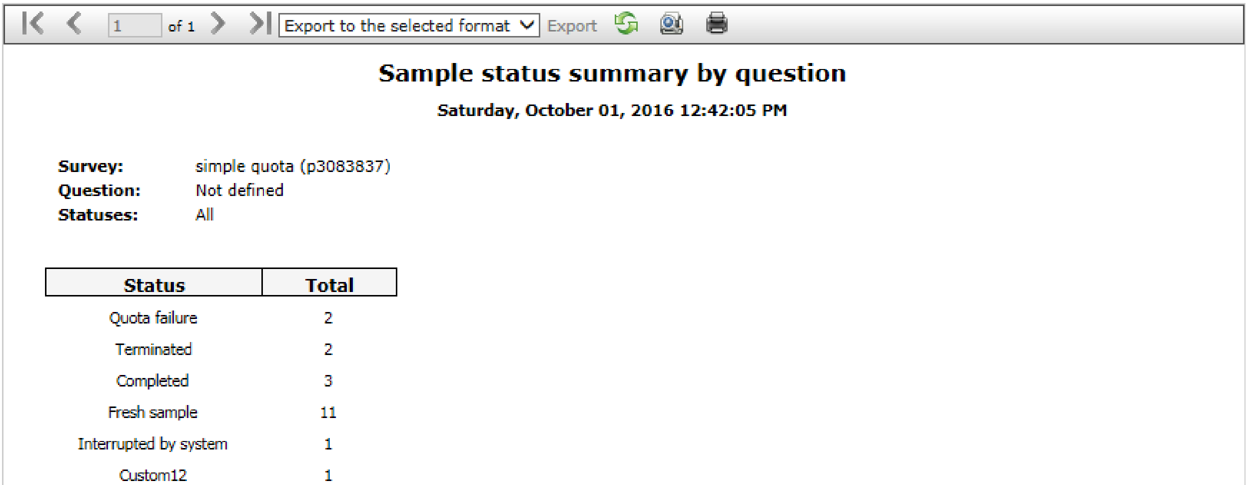


Figure 415 The generated Sample Status Summary by Question Report

5. It is possible to select a variable to be included in the report. The variable must be of ‘single’ type and also have the ‘Available as CATI filter’ setting enabled.

   The inclusion of a variable will add new columns to the report showing how the status counts are broken down by each category in the question.

.

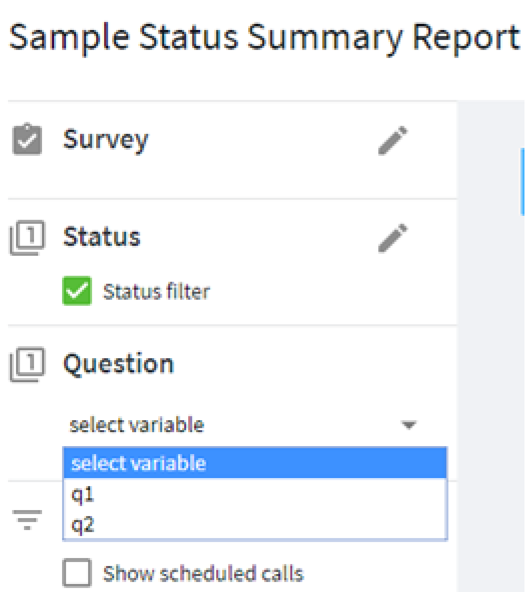
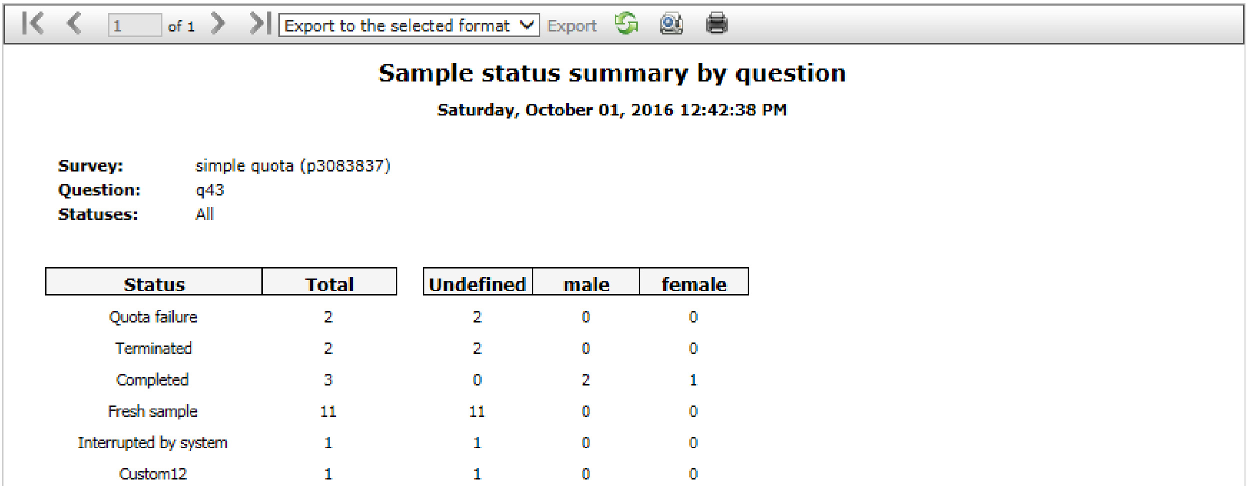


Figure 416 Selecting a variable to include into the Sample Status Summary by Question report

Click the Build Report button to generate the Sample Status Summary by Question Report for the selected question.

The generated report may look somewhat like this.



Sample status summary by question

Saturday, October 01, 2016 12:42:38 PM

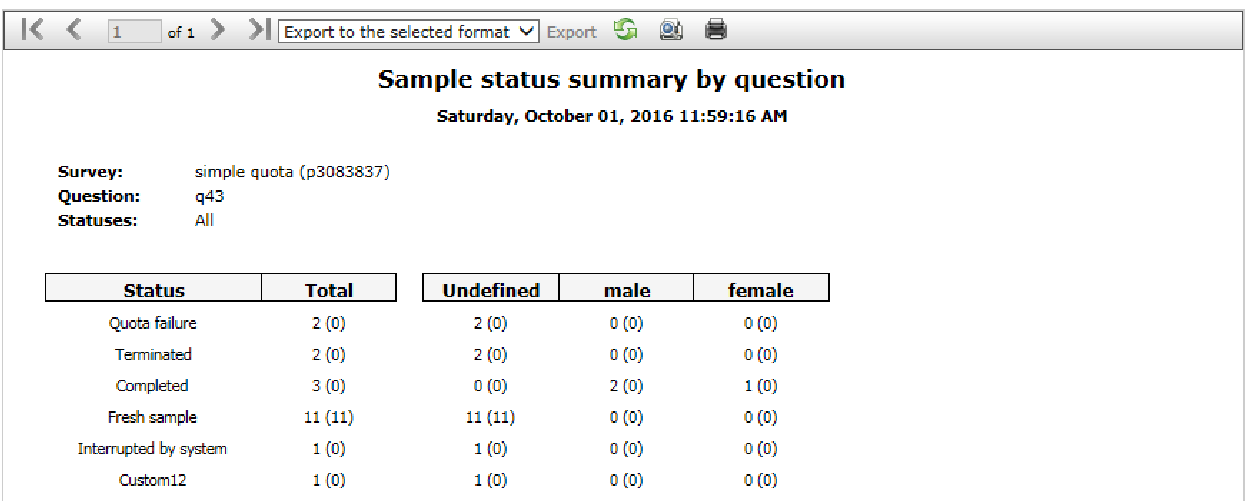
Survey: simple quota (p3083837)
Question: q43
Statuses: All

Status	Total	Undefined	male	female
Quota failure	2	2	0	0
Terminated	2	2	0	0
Completed	3	0	2	1
Fresh sample	11	11	0	0
Interrupted by system	1	1	0	0
Custom12	1	1	0	0

Figure 417 The Sample Status Summary by Question Report generated for the selected question

6. Additionally you can choose to apply the Show Scheduled calls option. Check this box to activate the option.

   This figure is displayed in the report columns in brackets next to the count of questions (answers).



Sample status summary by question

Saturday, October 01, 2016 11:59:16 AM

Survey: simple quota (p3083837)
Question: q43
Statuses: All

Status	Total	Undefined	male	female
Quota failure	2 (0)	2 (0)	0 (0)	0 (0)
Terminated	2 (0)	2 (0)	0 (0)	0 (0)
Completed	3 (0)	0 (0)	2 (0)	1 (0)
Fresh sample	11 (11)	11 (11)	0 (0)	0 (0)
Interrupted by system	1 (0)	1 (0)	0 (0)	0 (0)
Custom12	1 (0)	1 (0)	0 (0)	0 (0)

Figure 418 The Sample Status Summary by Question Report showing the number of scheduled calls

7. In case the generated report is large enough and occupies more than one page you can navigate through its pages using the browsing controls displayed above the report header.

   If the current report page does not fit into the application window it can be scrolled with the help of the scroll bar displayed on the right side of the frame.

   Click the Previous button  to jump one page back, click the Next button  to jump one page forward.

Numbers in the drop-down box to the right of these buttons show the current page number and the total number of pages in the report. You can jump to the specified report page – enter the page number in the box field and press Enter on the keyboard to do this.

Alternatively you can click the Go to First page button and choose to jump to the first report page, or choose the Go to Last page button to jump to the last report page.

8. You can refresh the generated report if the data updates. Click the Refresh button to do it.
9. The generated report can be exported and printed out – refer to Exporting the Generated Report and Printing the Generated Report for instructions.

9.8. Generating the Sample Utilization Report

The Sample Utilization Report provides statistics reflecting utilization of the uploaded sample records. You can use the report to analyze how each uploaded sample batch was used:

- to check the number of uploaded, deleted, attempted and currently available records, and also the number of attempted interview sample records;
- to monitor the exact number of the uploaded sample records that were blocked due to the exceeded cell quotas, and also the number of sample records that were attempted repeatedly after such blocking;
- to see how many of the attempted interviews were completed and also the average number of attempts per completed interview.

The Sample Utilization Report shows each uploaded sample batch on a separate row in the generated report. For each batch the report provides the following information:

- Time added - shows the exact time this batch was uploaded;
- Interviews added - shows how many records this sample batch contains;
- Current interviews - shows how many interviews the batch contains at the moment;
- Interviews attempted - shows how many interviews from this sample were attempted;
- Blocked by FCD attempted - shows the number of interviews that were blocked by FCD after they were attempted;
- Blocked by FCD not attempted - shows the number of interviews that were blocked by FCD before they were attempted;
- Attempted after blocked by FCD - this figure shows how many interviews were attempted after they were blocked by FCD;
- Blocked by blacklist - shows the number of sample records that were blocked during the sample batch upload operation (these numbers were blocked because they already exist in the CATI blacklist);
- Completes - the number of interviews from this batch that were completed;
- Attempted per complete - the number of attempted interviews from this batch per one completed;
- Average interviews per complete - average number of interviews from this batch per one completed;
- Deleted - the number of interviews deleted from this batch since it has been uploaded.

Note: 'FCD' is the abbreviation for 'Filtered by Call Delivery', and is enabled by the quota setting 'CATI Delivery when Quota not Full'. When enabled, CATI interviews will automatically be removed from the CATI call list and be given an extended status value of 27 (Filtered by call delivery) when the quota cell they fall into is full.

To generate the Sample Utilization Report:

1. Choose Reports in the Navigation menu, then choose the Sample Utilization Report from the drop-down list that unfolds.

Alternatively you can run the report from the Surveys tab. Choose the Surveys tab in the Navigation frame, select a survey in the list in the top right frame, right-click this survey and choose Reports/Sample Utilization Report from the context menu that appears.

This will display the Sample Utilization Report settings (this dialog opens in a separate window if you run the command from the Surveys list).

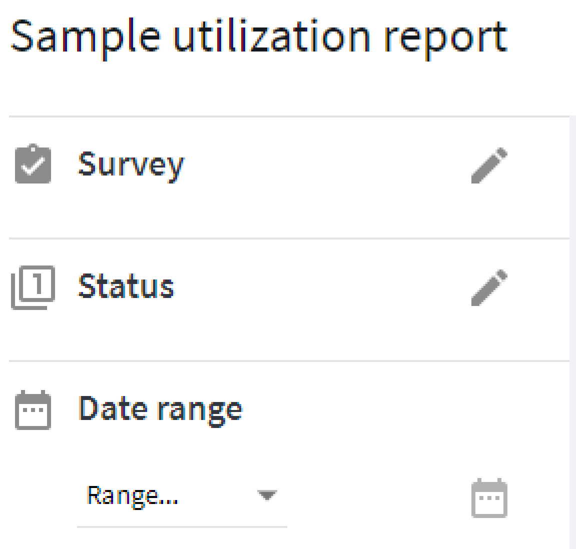


Figure 419 Configuring the Sample Utilization Report

2. Select a single survey (or a number of surveys) for which it will be generated. Click the Select button to display the Select Surveys dialog (see description of this form here - Selecting Surveys for the Survey List Activity View). Click OK in this dialog to save this setting.
3. Next you can choose to apply the Status filter option. Click the Select button to display the Status filter form.

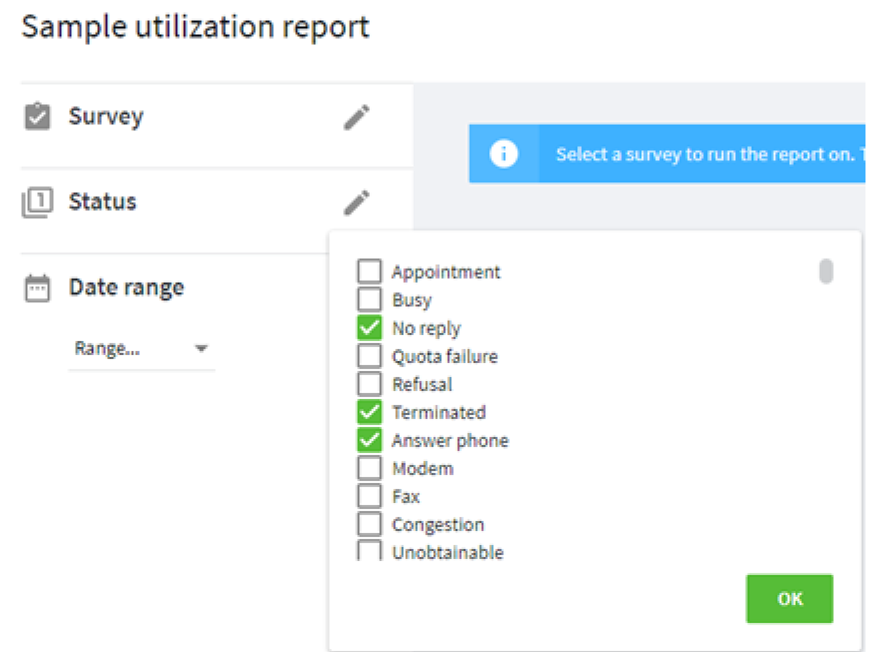


Figure 420 Applying extended status filter to the Sample Utilization Report

Put a check in front of extended statuses you want to include in the Sample Utilization Report. Click OK to save this setting.

4. The Date Range drop-down box allows selecting the time period for which the report should be generated. You can select a period from the drop-down list, or you can choose to define the period manually (the "Range" item in the list) – in this case the Range button on the right of this field becomes available. Click the Range button to display the Date Range form.

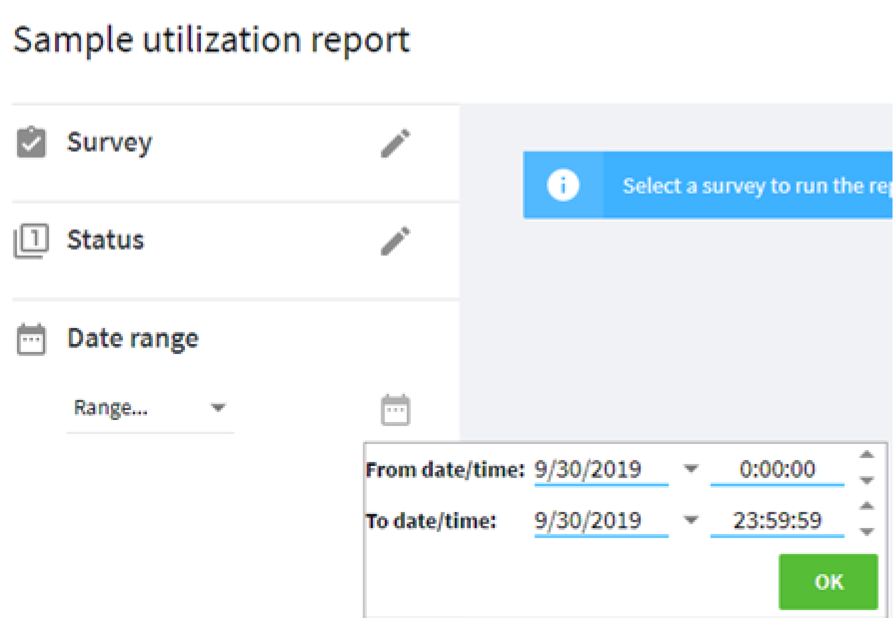
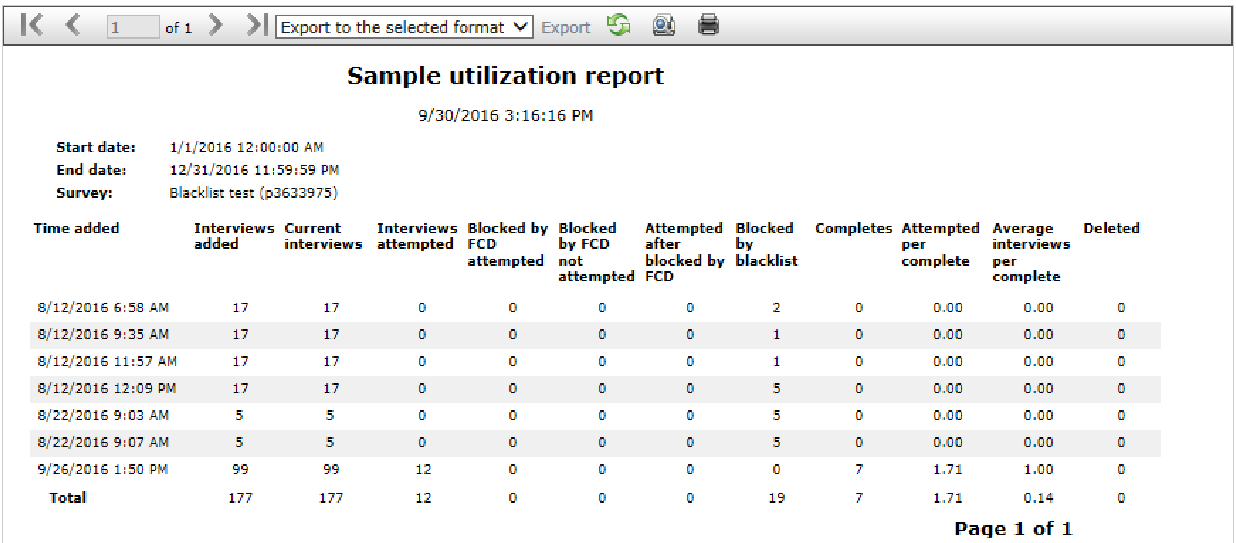


Figure 421 Adjusting the date range for the Sample Utilization Report

Specify the start and finish time of the desired period using the From and To fields. These fields include the calendar form which opens when you click the arrow button in the date field, and the time spinbox which allows increasing or decreasing value with the help of the buttons, or entering the value manually. Click OK to confirm this setting.

The Dates range drop-down list contains special semi-automatic options - "***n*** days ago". These options allow choosing the date for which the report would be generated automatically, without opening the calendar form. When chosen, each of these options sets a date in the calendar which is 1..7 days before today. For example, if today is May 17, and you choose "2 days ago" from the drop-down list, then May 15 is selected as the report date in the range.

5. Click the Build Report button to generate the Sample Utilization Report.



Sample utilization report

9/30/2016 3:16:16 PM

Start date: 1/1/2016 12:00:00 AM
End date: 12/31/2016 11:59:59 PM
Survey: Blacklist test (p3633975)

Time added	Interviews added	Current interviews	Interviews attempted	Blocked by FCD attempted	Blocked by FCD not attempted	Attempted after blocked by FCD	Blocked by blacklist	Completes	Attempted per complete	Average interviews per complete	Deleted
8/12/2016 6:58 AM	17	17	0	0	0	0	2	0	0.00	0.00	0
8/12/2016 9:35 AM	17	17	0	0	0	0	1	0	0.00	0.00	0
8/12/2016 11:57 AM	17	17	0	0	0	0	1	0	0.00	0.00	0
8/12/2016 12:09 PM	17	17	0	0	0	0	5	0	0.00	0.00	0
8/22/2016 9:03 AM	5	5	0	0	0	0	5	0	0.00	0.00	0
8/22/2016 9:07 AM	5	5	0	0	0	0	5	0	0.00	0.00	0
9/26/2016 1:50 PM	99	99	12	0	0	0	0	7	1.71	1.00	0
Total	177	177	12	0	0	0	19	7	1.71	0.14	0

Page 1 of 1

Figure 422 The generated Sample Utilization Report

6. In case the generated report is large enough and occupies more than one page you can navigate through its pages using the browsing controls displayed above the report header.

   If the current report page does not fit into the application window it can be scrolled with the help of the scroll bar displayed on the right side of the frame.

   Click the Previous button to jump one page back, click the Next button to jump one page forward.

   Numbers in the drop-down box to the right of these buttons show the current page number and the total number of pages in the report. You can jump to the specified report page – enter the page number in the box field and press Enter on the keyboard to do this.

   Alternatively you can click the Go to First page button and choose to jump to the first report page, or choose the Go to Last page button to jump to the last report page.

7. You can refresh the generated report if the data updates. Click the Refresh button to do it.
8. The generated report can be exported and printed out – refer to Exporting the Generated Report and Printing the Generated Report for instructions.

9.9. Viewing the Call Attempts Report

The Call Attempts report is a log that lists and details all calls that were made for a selected survey, or for all surveys. The report presents the following data, displayed in columns:

- **Date -** the date and time the call was made (displayed for the local time zone).
- **Survey ID -** the ID of the survey for which the call was made.
- **Survey Name -** the name of the survey for which the call was made.
- **Interviewer -** the login name of the interviewer who made the call.
- **Interviewer ID -** the ID of the interviewer who made the call.
- **Phone -** the respondent's phone number (dialed in the course of the call).
- **Extended Status -** the extended status which was assigned to the interview/call when it was finished (or suspended).
- **Waiting Time -** the time period between the first login to the system, completion of a break or end of the previous call, and the start of the next scheduled call.
- **Duration -** the duration of the interview/call.
- **Display Time -** the difference (in seconds) between the time the system finds and/or connects the call and the time the page is loaded into the interviewer console. This timing is only applicable when interviewing with the browser-based interface.

After the Call Attempts report is generated and displayed, you can filter the report contents by any column shown in the report except for the Duration column; this can only be used for sorting. The Call attempts report can be generated from the Reports tab for all surveys, or from the All Surveys list for a certain survey.

To generate the Call Attempts report for all surveys:

1. Go to **Navigation > Reports** then choose **Call Attempts** from the drop-down list that opens.

   The Call Attempts report opens in the CATI Supervisor window.

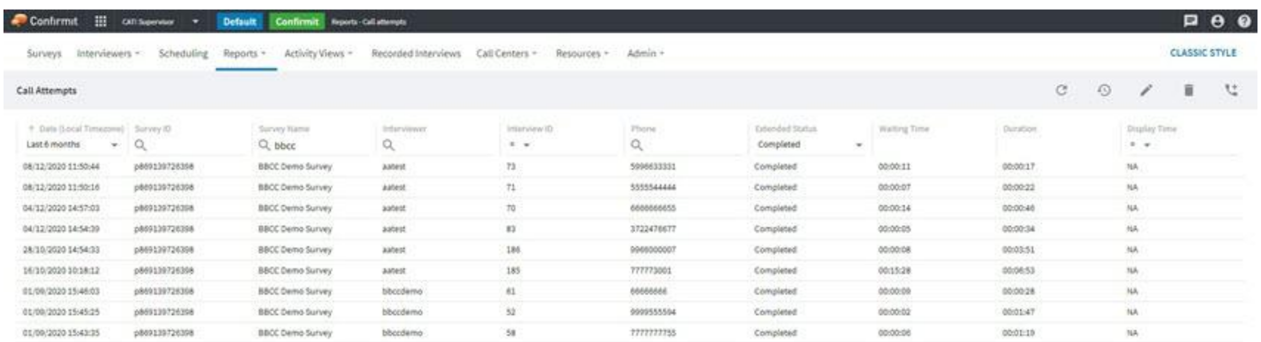


Figure 423 Example of the Call Attempts report

- To update the report click the **Refresh** button in the upper-right corner of the frame.
- To filter the records displayed in the report use the header row controls. Note that if you apply one or more filters, you must update the report (click **Refresh** or press **Enter** on your keyboard).
- You can sort the displayed events by their duration - click the Duration column header to change the sorting order.
- In the event you have filtered the log contents by applying criteria in searchable headers, you can remove all filters and display the complete call attempts list by pressing the **Reset** button .

To generate the Call Attempts report for a specific survey:

1. Choose the **Surveys** tab in the left Navigation frame.

This will display the All Surveys list in the top right frame.

1. In the All Surveys list select a survey you want to generate the Call Attempts report for and right-click this survey. Choose Reports/Call Attempts report from the context menu that appears.

   This will display the Call Attempts report in a separate window.

2. You can update and filter the generated report - refer to steps 2 to 5 of the previous instruction.

To edit or delete the report:

In the Call Attempts report, professional users or supervisors with CATI administrator permissions can also edit or delete individual call history entries. You can edit the Extended Status and you can adjust or clear the telephone number. There are a couple of scenarios where these capabilities might be helpful...

1. Cleaning Personal Data: If a respondent requests that all of their personal data be removed from the system. In this case the personally identifiable information should be deleted from both the respondent and survey databases. However telephone numbers that are also retained in the CATI database can now be removed by a CATI admin user locating and then editing or deleting the corresponding call history entries via the Call Attempts report in the CATI supervisor UI.

2. Correcting Reporting Discrepancies: If a previously conducted interview is removed from the system by deleting it in the survey data editor, then although this record will no longer be counted when looking at the status count in Professional Authoring, Survey Designer or downstream data analysis reports, the counts displayed in the CATI supervisor productivity reports will not be adjusted because these are based on the historical call attempt data. To bring the CATI productivity reports back into synchronization, you can now adjust the corresponding entries in the Call Attempts report.

To edit a row in the report, either right-click in the row you wish to edit to open the drop-down then select **Edit** from the drop-down menu, or click in the row to select it then click the **Edit** button in the toolbar. The Edit Call History Record overlay opens.

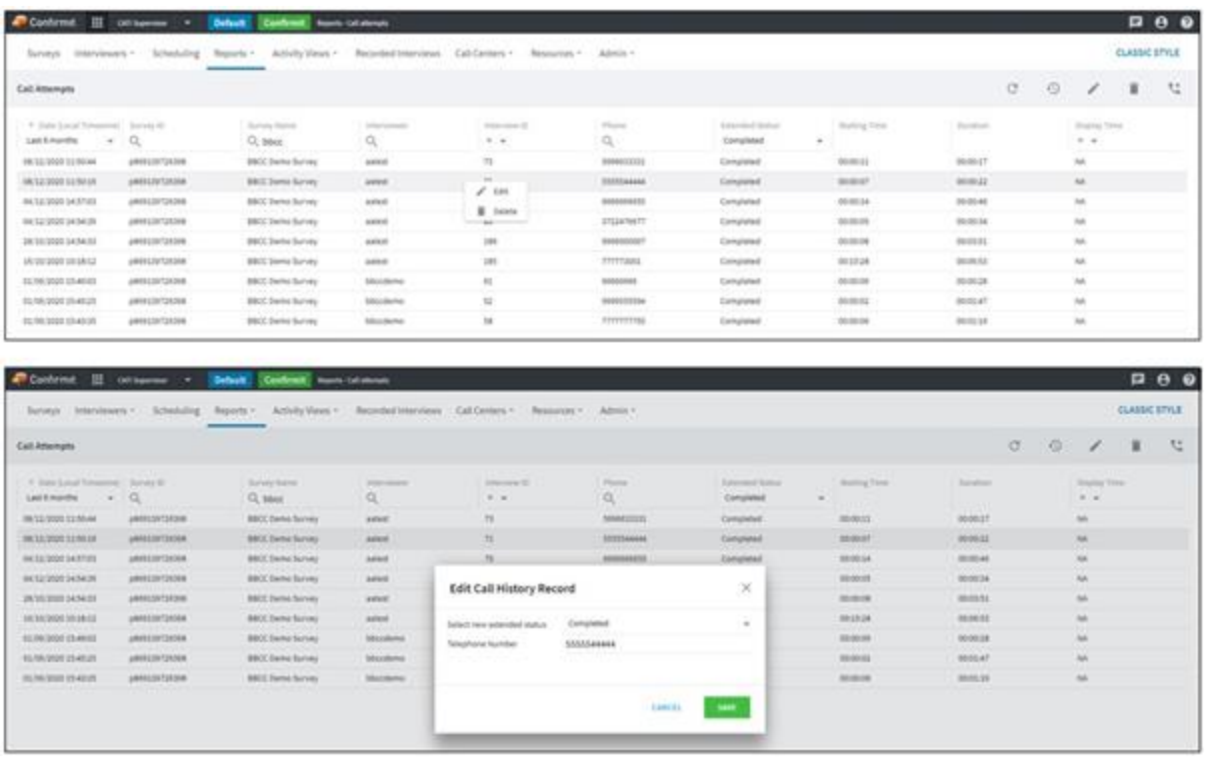


Figure 424 Editing a Call History record

You can now change the extended status or edit the telephone number as required.

To delete a row, either right-click in the row to open the drop-down then select **Delete** from the drop-down menu, or click in the row to select it then click the **Delete** button in the toolbar. Confirm the deletion.

9.10. Generating the Attempts by Disposition Report

The Attempts by disposition Report provides statistics detailing the distribution of interviews by the count of attempts made broken down by the Extended Status.

To generate the Attempts by Disposition Report:

1. Choose **Reports** in the Navigation menu, then choose the **Attempts by Disposition Report** from the drop-down list that unfolds.

   Alternatively you can run the report from the Surveys tab. In this case, choose the Surveys tab in the Navigation frame, select a survey in the list in the top right frame, right-click this survey and choose **Reports/Attempts by Disposition Report** from the context menu that appears.

   This will display the Attempts by Disposition Report settings (this dialog opens in a separate window if you run the command from the Surveys list).

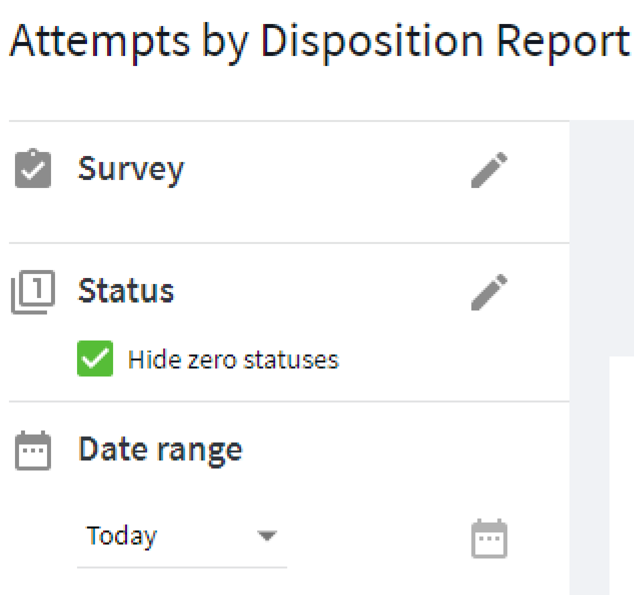


Figure 425 Configuring the Attempts by disposition Report

2. The Attempts by disposition Report allows you to select a survey for which the report will be generated. Click the **Select** button to display the Survey Search form (see description of this form here - Selecting Surveys for the Survey List Activity View). Only one survey can be selected (this type of report is generated for a single survey only). Click **OK** in the form to save this setting.

Note: The Survey Search form which is activated using the Select button does not contain the Find field; it only allows you to apply a filter to the list of surveys.

3. The Status field allows selecting interview Extended Statuses. Interviews with the selected status will be included in the report. Click the Select button and check the required statuses in the scrollable list that appears. Click OK below this list to confirm this setting.

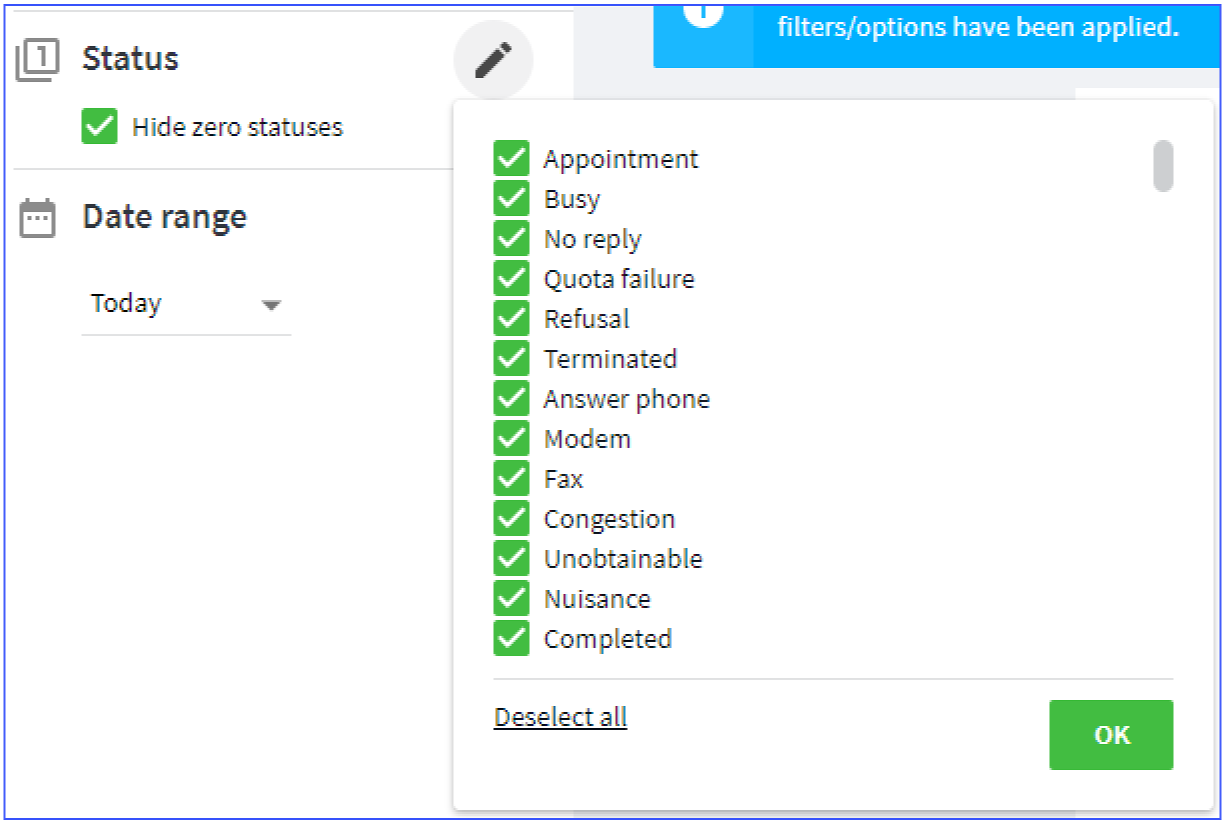


Figure 426 Selecting extended statuses to include into the Attempts by disposition Report

By default all extended statuses are included (all boxes are checked).

4. Clear the boxes to exclude interviews with that status from the report, or choose the Deselect/Select option below the list to exclude/include interviews in all statuses.

The Date Range drop-down box allows selecting the time period for which the report should be generated. You can select a period from the drop-down list, or you can choose to define the period manually. In the latter case choose the Calendar icon on the right of this field. This will display the Date Range form.

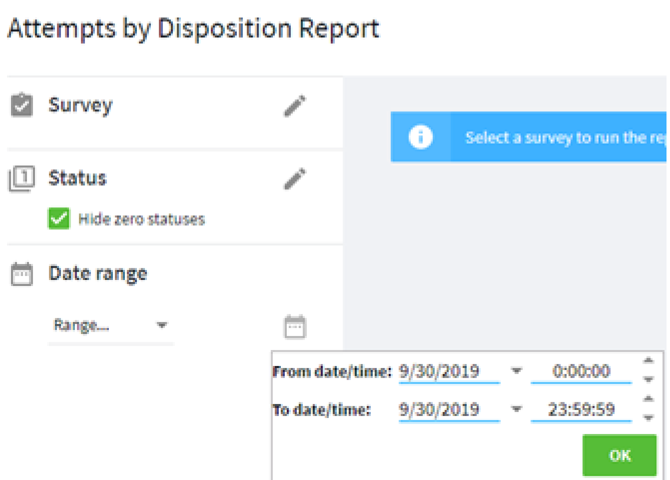


Figure 427 Choosing the date range for the Attempts by disposition Report

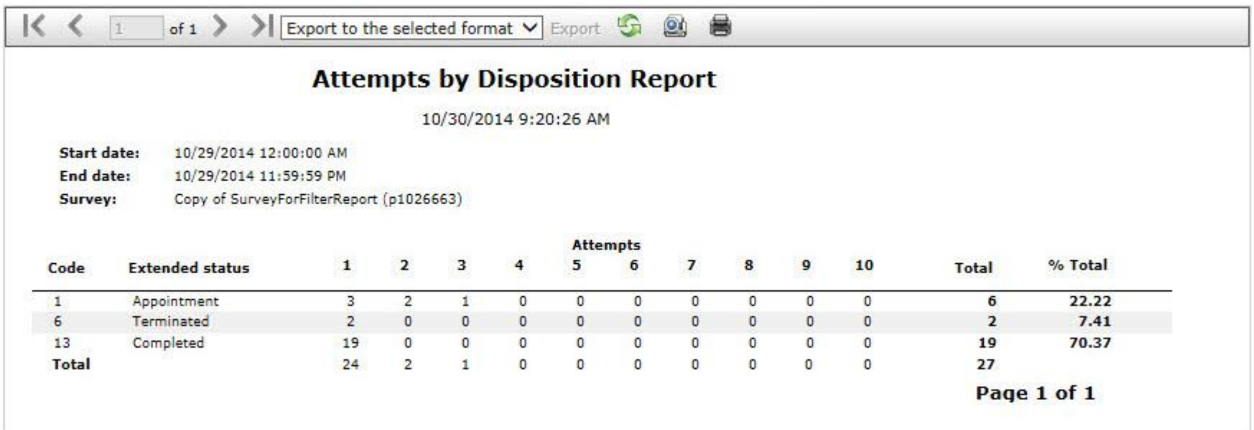
5. Specify the start and finish time for the desired period using the From and To fields. Choosing these fields invokes a calendar form (click the arrow button in the date field). The time spinbox allows increasing and decreasing value with the help of the buttons, or entering the value manually. Click **OK** below this list to confirm this setting.

6. You can exclude from the report all the statuses that were never assigned to any interview during the selected period. In such case all rows containing statistics pertaining to these "zero" statuses are hidden in the generated report, so the report is easier to view.

   Check the Hide Zero States box to exclude zero statuses from the report.

   The report shown in the picture below is generated with the Hide Zero States option turned on. Although all Extended Statuses were selected using the Status option, only two statuses are included into the generated report - other statuses were never assigned to the interviews during the selected period.

6. Click the **Build Report** button to generate the Attempts by disposition Report.



Attempts by Disposition Report

10/30/2014 9:20:26 AM

Start date: 10/29/2014 12:00:00 AM
End date: 10/29/2014 11:59:59 PM
Survey: Copy of SurveyForFilterReport (p1026663)

		Attempts											
Code	Extended status	1	2	3	4	5	6	7	8	9	10	Total	% Total
1	Appointment	3	2	1	0	0	0	0	0	0	0	6	22.22
6	Terminated	2	0	0	0	0	0	0	0	0	0	2	7.41
13	Completed	19	0	0	0	0	0	0	0	0	0	19	70.37
Total		24	2	1	0	0	0	0	0	0	0	27	

Page 1 of 1

Figure 428 The generated Attempts by disposition Report

7. In the event the generated report occupies more than one page, you can navigate through its pages using the browsing controls displayed above the report header.

   If the current report page does not fit into the application window it can be scrolled with the help of the scroll bar displayed on the right side of the frame.

   Click the **Previous** button to jump one page back, click the **Next** button to jump one page forward.

   Numbers in the drop-down box to the right of these buttons show the current page number and the total number of pages in the report. You can jump to the specified report page – enter the page number in the box field and press **Enter** on the keyboard to do this.

   Alternatively you can click the **Go to First page** button and choose to jump to the first report page, or choose the **Go to Last page** button to jump to the last report page.

8. You can refresh the generated report if the data updates - click the **Refresh** button .

9. The generated report can be exported and printed out – refer to Exporting the Generated Report and Printing the Generated Report for instructions.

9.11. Generating the Number of Attempts Report

The Number of Attempts Report provides statistics detailing the distribution of interviews by the count of attempts made.

To generate the Number of Attempts report:

1. Choose Reports in the Navigation menu, then choose the Number of Attempts Report from the drop-down list that unfolds.

   Alternatively you can run the report from the Surveys tab. Choose the Surveys tab in the Navigation frame, select a survey in the list in the top right frame, right-click this survey and choose Reports/Number of Attempts Report from the context menu that appears.

   This will display the Number of Attempts Report settings (this dialog opens in a separate window if you run the command from the Surveys list).

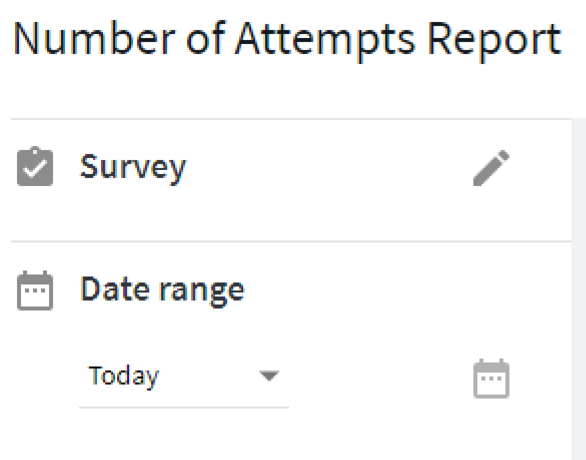


Figure 429 Configuring the Number of attempts Report

2. Select a single survey for which the report will be generated. Click the Select button (Survey) to display the Select Surveys dialog (see description of this form here - Selecting Surveys for the Survey List Activity View). Click Save selected in this dialog to save this setting.

Only one survey can be selected (this type of report is generated for a single survey only). Therefore the Select Surveys dialog does not allow for multiple choice of surveys - only one survey can be chosen at any moment.

3. The Date Range drop-down box allows selecting the time period for which the report should be generated. You can select a period from the drop-down list, or you can choose to define the period manually. In the latter case choose the Calendar icon on the right of this field. This will display the Date Range form.

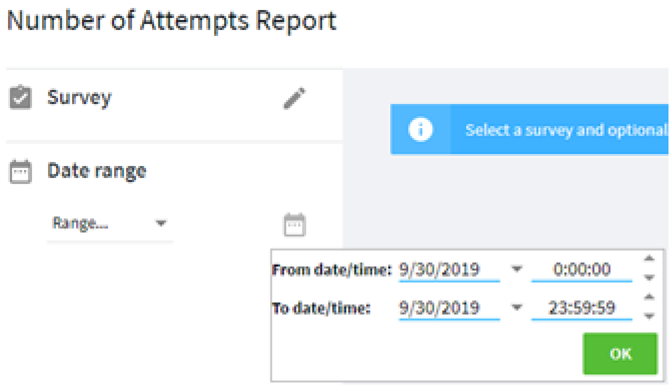
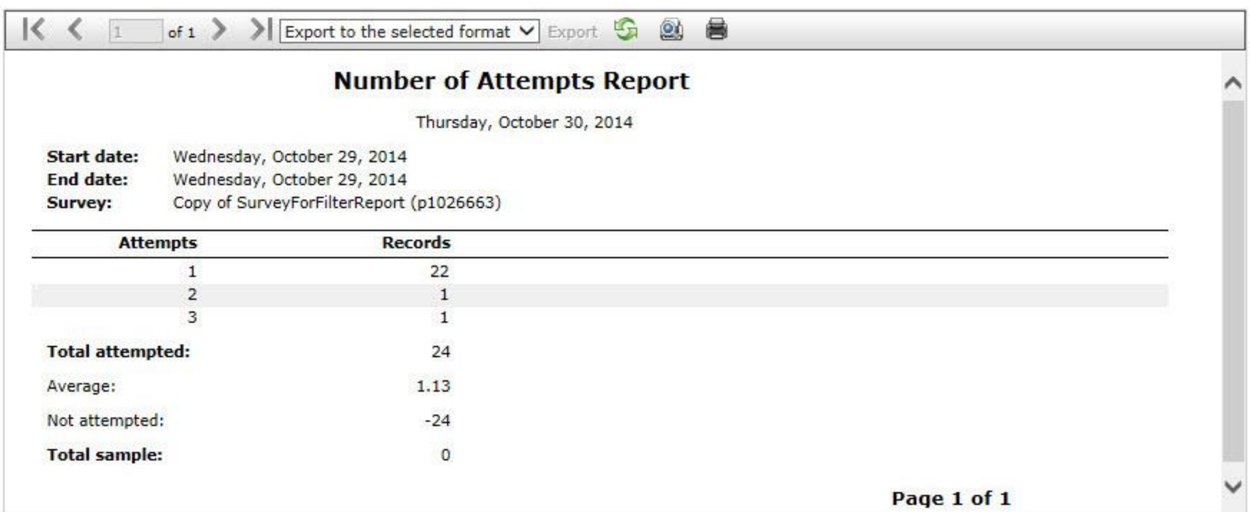


Figure 430 Choosing the date range for the Number of Attempts Report

Specify the start and finish time for the desired period using the From and To fields. Choosing these fields invokes a calendar form (click the arrow button in the date field). The time spinbox allows increasing and decreasing value with the help of the buttons, or entering the value manually. Click OK below this list to confirm this setting.

The Dates range drop-down list contains special semi-automatic options - "***n*** days ago". These options allow choosing the date for which the report would be generated automatically, without opening the calendar form. When chosen, each of these options sets a date in the calendar which is 1..7 days before today. For example, if today is May 17, and you choose "2 days ago" from the drop-down list, then May 15 is selected as the report date in the range.

4. Click the Build Report button to generate the Number of Attempts Report.



Number of Attempts Report

Thursday, October 30, 2014

Start date: Wednesday, October 29, 2014
End date: Wednesday, October 29, 2014
Survey: Copy of SurveyForFilterReport (p1026663)

Attempts	Records
1	22
2	1
3	1
Total attempted:	24
Average:	1.13
Not attempted:	-24
Total sample:	0

Page 1 of 1

Figure 431 The generated Number of Attempts Report

5. In case the generated report is large enough and occupies more than one page you can navigate through its pages using the browsing controls displayed above the report header.

   If the current report page does not fit into the application window it can be scrolled with the help of the scroll bar displayed on the right side of the frame.

   Click the Previous button  to jump one page back, click the Next button  to jump one page forward.

Numbers in the drop-down box to the right of these buttons show the current page number and the total number of pages in the report. You can jump to the specified report page – enter the page number in the box field and press Enter on the keyboard to do this.

Alternatively you can click the Go to First page button  and choose to jump to the first report page, or choose the Go to Last page button  to jump to the last report page.

6. You can refresh the generated report if the data updates. Click the Refresh button  to do it.
7. The generated report can be exported and printed out – refer to Exporting the Generated Report and Printing the Generated Report for instructions.

9.12. Generating the Inbound Call Summary Report

The Inbound Call Summary report provides a list of inbound calls that were made during a day for a single survey over a selected period of time. This report is broken down by one hour intervals and provides statistics showing how inbound calls were handled during each hour.

The Inbound Call Summary report contains the following data displayed in columns:

- Call Times - one hour interval for which the statistics were calculated;
- Total Calls - total number of inbound calls registered by the system during this one hour interval (other statistics are also calculated for certain one-hour intervals);
- Handled - the number of inbound calls answered by an interviewer;
- Abandoned by system - the number of inbound calls dropped by the system (for reasons like "survey is closed", "time of the call is out of shift" etc.);
- Abandoned by respondent - the number of inbound calls that were not answered by an interviewer and were eventually dropped by a respondent;
- Avg wait time for connection - average amount of time the respondent spends waiting for his call to be answered by an interviewer;
- Avg wait time for abandons - average amount of time the respondent spends waiting until they drop the call because there is no answer from an interviewer;
- Abandon rate - percentage of the abandoned inbound calls in the total number of inbound calls;
- Avg call duration for connected calls - average duration of a handled inbound call;
- Completes count - the number of calls that were finished with the Complete status,.

To generate the Inbound Call Summary Report:

1. Choose Reports in the Navigation menu, then choose the Call Summary Report from the drop-down list that unfolds.

   Alternatively you can run the report from the Surveys tab. Choose the Surveys tab in the Navigation frame, select a survey in the list in the top right frame, right-click this survey and choose Reports/ Inbound Call Summary Report from the context menu that appears.

   This will display the Inbound Call Summary Report settings (this dialog opens in a separate window if you run the command from the Surveys list).

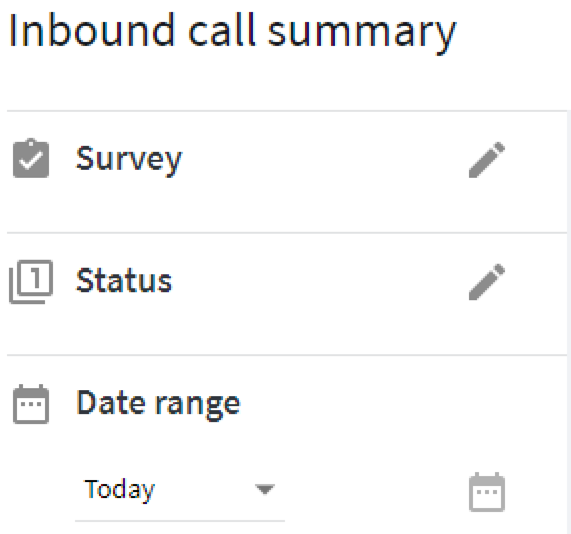


Figure 432 Inbound Call Summary report settings

2. Select a single survey (or a number of surveys) for which it will be generated. Click the Select button to display the Select Surveys dialog (see description of this form here - Selecting Surveys for the Survey List Activity View). Click OK in this dialog to save this setting.

3. Next you can choose to apply the Status filter option. Click the Select button and check the required statuses in the scrollable list that appears. To select or deselect all the available statuses at once choose the "Select all" or "Deselect all" option under the scrollable list. Click OK below this list to confirm this setting.

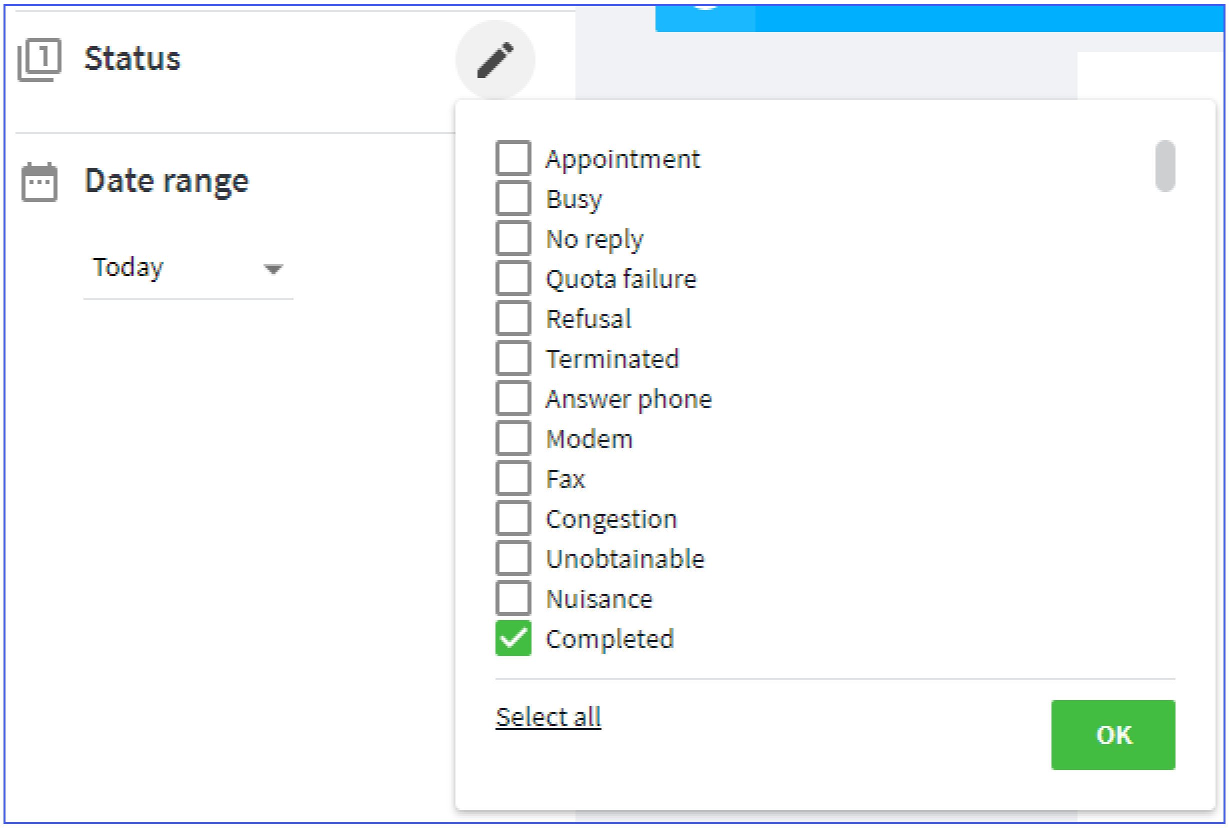


Figure 433 Selecting extended statuses to include into the Inbound Call Summary report

4. The Date Range drop-down box allows selecting the time period for which the report should be generated. You can select a period from the drop-down list, or you can choose to define the period manually (the "Range" item in the list) – in this case the Range button on the right of this field becomes available. Click the Range button to display the Date Range form.

5. The Date Range drop-down box allows selecting the time period for which the report should be generated. You can select a period from the drop-down list, or you can choose to define the period manually. In the latter case choose the Calendar icon on the right of this field. This will display the Date Range form.

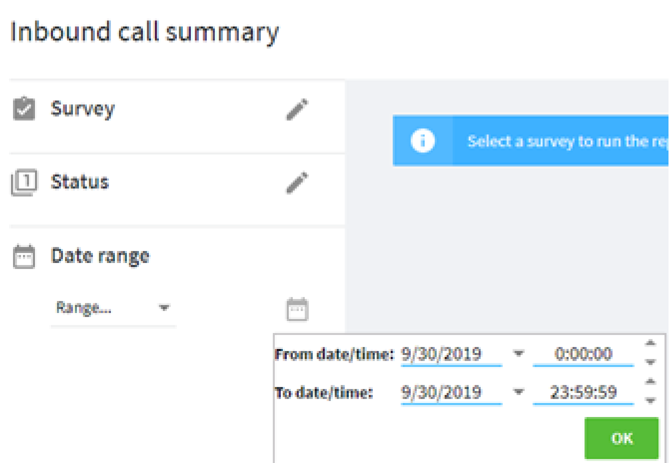


Figure 434 Adjusting the date range for the Sample Utilization Report

Specify the start and finish time for the desired period using the From and To fields. Choosing these fields invokes a calendar form (click the arrow button in the date field). The time spinbox allows increasing and decreasing value with the help of the buttons, or entering the value manually. Click OK below this list to confirm this setting.

The Dates range drop-down list contains special semi-automatic options - "***n*** days ago". These options allow choosing the date for which the report would be generated automatically, without opening the calendar form. When chosen, each of these options sets a date in the calendar which is 1..7 days before today. For example, if today is May 17, and you choose "2 days ago" from the drop-down list, then May 15 is selected as the report date in the range.

6. Click the Build Report button to generate the Sample Utilization Report.

1 of 1 Export to the selected format Export

Inbound Call Summary

1/17/2019 3:43:08 PM

Start date: Monday, October 1, 2018 12:00 AM

End date: Thursday, January 17, 2019 11:59 PM

Survey: CallTransferSurvey (p1969558)

Statuses: Appointment, Busy, No reply, Quota failure, Refusal, Terminated, Answer phone, Modem, Fax, Congestion,

Call Times	Total Calls	Handled	Abandoned by system	Abandoned by respondent	Avg wait time for connection	Avg wait time for abandons	Abandon rate	Distinct agents	Avg call duration for connected calls	Completes count
00:00 - 00:59	0	0	0	0	00:00	00:00	0.00%	0	00:00	0
01:00 - 01:59	0	0	0	0	00:00	00:00	0.00%	0	00:00	0
02:00 - 02:59	0	0	0	0	00:00	00:00	0.00%	0	00:00	0
03:00 - 03:59	0	0	0	0	00:00	00:00	0.00%	0	00:00	0
04:00 - 04:59	0	0	0	0	00:00	00:00	0.00%	0	00:00	0
05:00 - 05:59	0	0	0	0	00:00	00:00	0.00%	0	00:00	0
06:00 - 06:59	0	0	0	0	00:00	00:00	0.00%	0	00:00	0
07:00 - 07:59	0	0	0	0	00:00	00:00	0.00%	0	00:00	0
08:00 - 08:59	0	0	0	0	00:00	00:00	0.00%	0	00:00	0
09:00 - 09:59	5	1	4	0	00:00	00:01	80.00%	1	00:01	0
10:00 - 10:59	0	0	0	0	00:00	00:00	0.00%	0	00:00	0
11:00 - 11:59	28	15	12	1	00:08	00:14	46.43%	2	00:03	1
12:00 - 12:59	23	21	2	0	01:13	00:04	8.70%	3	00:05	0
13:00 - 13:59	16	16	0	0	524:48	00:00	0.00%	2	00:02	0
14:00 - 14:59	12	10	2	0	2512:21	00:01	16.67%	2	20:43	3
15:00 - 15:59	26	21	1	4	00:07	00:41	19.23%	3	00:20	0
16:00 - 16:59	15	13	1	1	00:14	32253:18	13.33%	3	00:08	1
17:00 - 17:59	0	0	0	0	00:00	00:00	0.00%	0	00:00	0
18:00 - 18:59	0	0	0	0	00:00	00:00	0.00%	0	00:00	0
19:00 - 19:59	0	0	0	0	00:00	00:00	0.00%	0	00:00	0
20:00 - 20:59	0	0	0	0	00:00	00:00	0.00%	0	00:00	0
21:00 - 21:59	0	0	0	0	00:00	00:00	0.00%	0	00:00	0
22:00 - 22:59	0	0	0	0	00:00	00:00	0.00%	0	00:00	0
23:00 - 23:59	0	0	0	0	00:00	00:00	0.00%	0	00:00	0

Figure 435 Generated Inbound Call Summary Report

7. In case the generated report is large enough and occupies more than one page you can navigate through its pages using the browsing controls displayed above the report header.

If the current report page does not fit into the application window it can be scrolled with the help of the scroll bar displayed on the right side of the frame.

Click the Previous button to jump one page back, click the Next button to jump one page forward.

Numbers in the drop-down box to the right of these buttons show the current page number and the total number of pages in the report. You can jump to the specified report page – enter the page number in the box field and press Enter on the keyboard to do this.

Alternatively you can click the Go to First page button and choose to jump to the first report page, or choose the Go to Last page button to jump to the last report page.

8. You can refresh the generated report if the data updates. Click the Refresh button to do it.
9. The generated report can be exported and printed out – refer to Exporting the Generated Report and Printing the Generated Report for instructions.

9.13. Viewing the Inbound Call History Log

The Inbound Call History log lists and details all calls that were made for a selected survey, or for all surveys.

The Inbound Call History log contains the following data displayed in columns:

- Date - the date and time the inbound call was made (displayed for the local time zone);
- Survey ID - ID of the survey for which the call was made;
- Survey Name - the name of the survey for which the call was made;
- Inbound telephone number - the DDI number to which the call was made;
- Respondent telephone number - the telephone number from which the call was made, identified by the CLI facility;
- Interview ID - ID of an interview corresponding to this call;
- Operation - short description of an operation performed by the system to handle the inbound call;

After the Inbound Call History log is generated and displayed the user can filter the report contents by any column.

To generate the Inbound Call History log for all surveys:

1. Choose Reports in the Navigation menu, then choose the Inbound Call History from the drop-down list that unfolds.

   This will display the Inbound Call History log in the CATI Supervisor window.

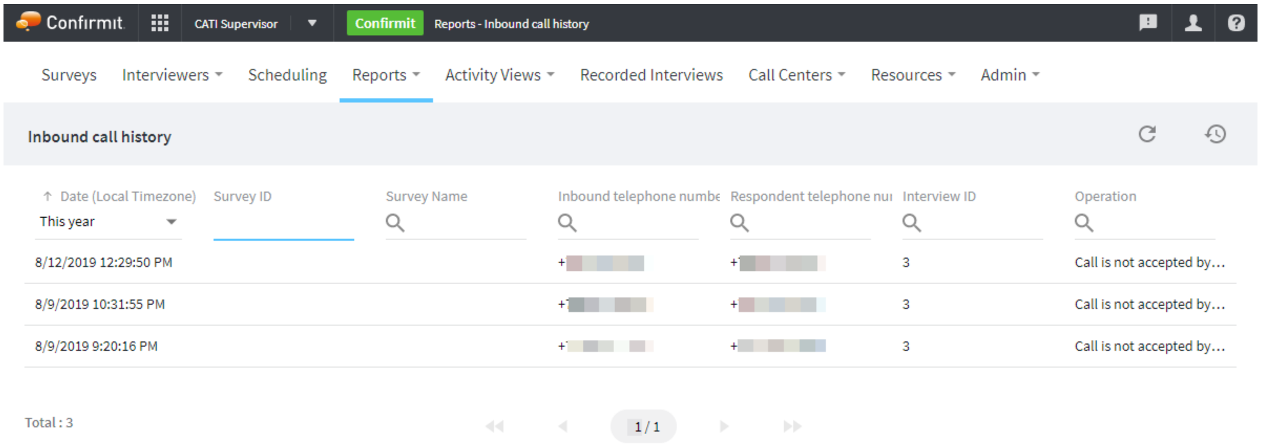


Figure 436 The Inbound Call History log

2. You may want to update the report - click the Refresh button in the top right corner of the frame to do it.
3. You can filter records displayed in the report - use the header row controls to do this. If you apply a filter (or a number of filters) you have to click the Refresh button to update the report (or press Enter after all required filters are set).
4. In case you have filtered the log contents by applying criteria in a searchable header you can remove all filters and display the complete call attempts list by pressing the Reset button on the frame toolbar.

To generate the Inbound Calls History report for a certain survey:

1. Choose the Surveys section in the left Navigation frame. This will display the All Surveys list in the top right frame.
2. In the All Surveys list select a survey you want to generate the Inbound Calls History report for and right-click this survey. Choose Reports/Inbound Calls History from the context menu that appears.

   This will display the Inbound Calls History log in a separate window.
3. You can update and filter the generated report - refer to steps 2 to 4 of the previous instruction.

9.14. Viewing the Interviewer Submission Details Log

The Interviewer Submission Details Log lists all CATI interviewer alerts that have been raised based on the "Last Submission Alert" and "Quick answer submission Alert (for alert report)", both warning and red alert thresholds.

The purpose of this log is to track alerts that have been raised by interviewers who are either speeding through the survey or spending large amounts of time on certain questions.

The toolbar allows for filtering on the survey(s) and interviewer(s) that are to be viewed and the searchable headers allow filtering of the list created.

The Interviewer Submission Details Log contains the following data displayed in columns:

- Date (local timezone) - the date when the alert was raised (in the local timezone),
- Survey ID,
- Survey Name,
- Interviewer - interviewer name,
- Interview ID,
- Type - type of the alert raised (either Last Submission, or Quick answer),

- Threshold - the threshold type that was reached (or exceeded),
- Duration - how long had it took for the interviewer to submit the answer (shown in seconds),
- Question,
- Interview state - what state the interview had been in when the alert was raised (either Interviewing or Openend reviewing).

This data is captured ONLY if the alerts are set. If no alerts are set, no data is captured. If alert thresholds are changed the historic alert data is not retrospectively changed. Alert data is deleted after a system configured number of days (30 days by default).

To view Interviewer Submission Details log for all surveys:

1. Choose Reports in the Navigation menu, then choose the Interviewer Submission Details from the drop-down list that unfolds.

   This will display the Interviewer Submission Details Log in the CATI Supervisor window.

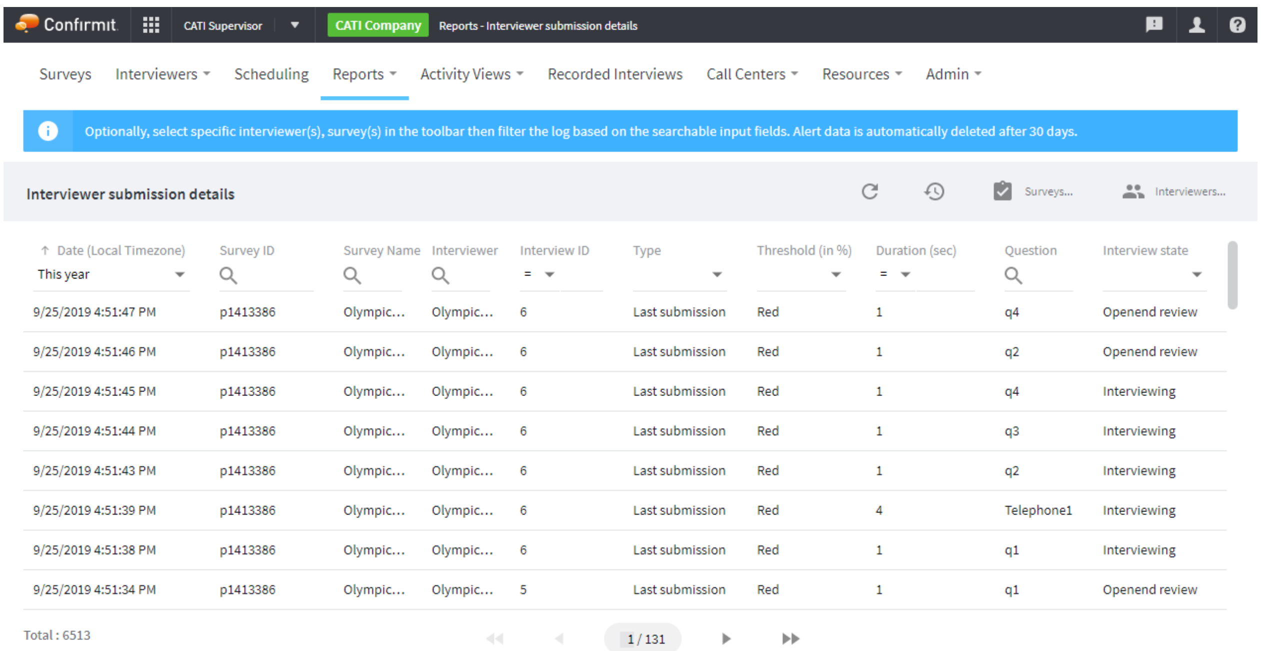
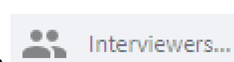


Figure 437 Interviewer Submission Details Log displayed in the top right frame of the CATI Supervisor window

2. You can view the log for particular surveys, or interviewers. Click the Surveys button 

 in the upper left corner of the frame to display the Select Surveys dialog. This will allow to specify particular surveys for which the log will display information.

   To generate the log for particular interviewers click the Interviewers button 

 in the upper left corner of the frame to display the Select Interviewers dialog. This will allow to specify particular interviewers and interviewer groups for which the log will display information.

   Refer to (go to Selecting Surveys for the Survey List Activity View on page 297 for more information) for description of the Select Surveys dialog. The Select Interviewers dialog assumes using the same technique as it is used with the Select Surveys dialog.

3. You may want to update the log - click the Refresh button in the top right corner of the frame to do it.

4. You can filter records displayed in the log - use the header row controls to do this. If you apply a filter (or a number of filters) you have to click the Refresh button to update the log (or press Enter after all required filters are set).
5. You can also sort the displayed events by the date - click the Date (Local Timezone) column header to change the sorting order. The triangle icon in the header cell will show the sorting direction - either ascending or descending.
6. In case you have filtered the log contents by applying criteria in searchable headers you can remove all filters and display the complete submission details list by pressing the Reset button on the frame toolbar.

9.15. Generating the Aggregated Interviewer Submission Report

The Aggregated Interviewer Submission Report shows aggregated alert data (based on the same data in the Interviewer submission details log (go to Viewing the Interviewer Submission Details Log on page 442 for more information).

The purpose of this report is to provide aggregated counts of alerts that have occurred, and to help identify interviewers who are either speeding through the survey or are spending large amounts of time on specific questions.

The report toolbar allows you to filter on the survey(s), interviewer(s), alert type (last submission or quick submission) date range or interview state (interviewing or openend reviewing) that are to be viewed. Then searchable and sortable headers allow filtering of the list created.

Fields available in the report are:

- Interviewer.
- **Red count -** the number of red alerts generated over the specified period.
- **Warning count -** the number of warning alerts generated over the specified period.
- **Total count -** the total number of alerts generated over the specified period.

This data is captured ONLY if the alerts are set. If no alerts are set, no data is captured. If alert thresholds are changed, the historic alert data is not retrospectively changed. Alert data is deleted after a system-configured number of days (30 days by default).

To generate the Aggregated Interviewer Submission Report:

1. Go to the **Navigation > Reports** menu item, then choose the **Aggregated Interviewer Submission Report** from the drop-down list that unfolds.

   Alternatively you can run the report from the All Surveys tab. Choose the All Surveys tab in the Navigation frame, select a survey in the list in the top right frame, right-click this survey and choose **Reports/Aggregated Interviewer Submission Report** from the context menu that appears.

   The Interviewer Productivity Report is displayed.

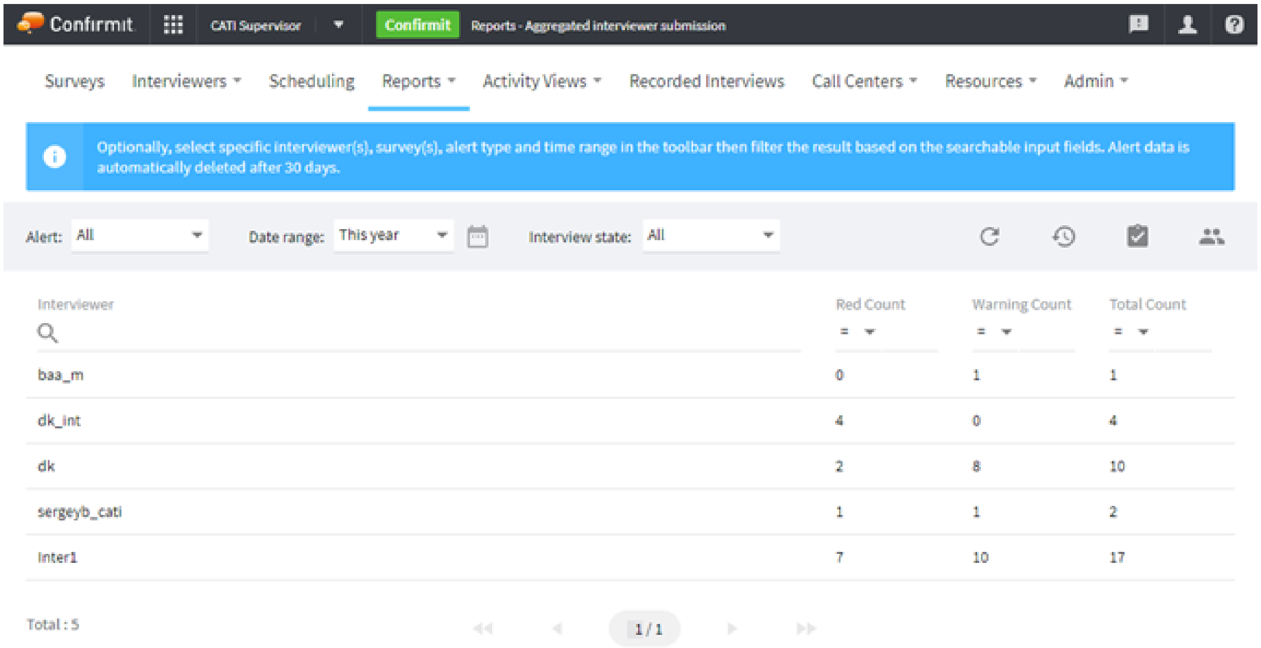


Figure 438 Viewing the Aggregated Interviewer Submission Report

2. You can generate the report for particular surveys, or interviewers. Click the Surveys button Surveys... in the upper left corner of the frame to display the Select Surveys dialog.

   To generate the report for particular interviewers click the Interviewers button in the upper left corner of the frame to display the Select Interviewers dialog (go to Selecting Surveys for the Survey List Activity View on page 297 for more information). The Select Interviewers dialog uses the same techniques as the Select Surveys dialog.

3. You can configure the report by applying filters. To apply a filter choose the required value from the appropriate drop-down box located at the top of the right frame. You can display only events with a specific alert type by choosing the alert type from the Alert drop-down box. You can generate the report for the selected date range by choosing a predefined date range from the Range drop-down box (go to Generating the Survey Productivity Report on page 398 for more information). You can also display only events with the certain Interview state by choosing the appropriate state from the Interview state drop-down box.

4. You can also sort the displayed events by the red alert count; click the Red Alert Count column header to change the sorting order. The triangle icon in the header cell indicates the sorting direction - either ascending or descending.

5. You may want to update the report - click the Refresh button in the top right corner of the frame to do it.

6. You can filter records displayed in the report - use the header row controls to do this. When you apply a filter (or a number of filters), click the **Refresh** button or press **Enter** to update the report.

7. If you have filtered the report contents by applying criteria in searchable headers, you can remove all the filters and display the complete call attempts list by clicking the **Reset** button on the frame toolbar.

9.16. Exporting the Generated Report

The generated report can be exported and saved in one of the commonly used formats. The saved report file can then be opened using the appropriate application capable of reading files in this format.

Note that the following reports could not be exported: Call Attempts, Interviewer Breaks, Interviewer Submission Details, and Aggregated Interviewer Submission.

To export a report:

1. After the generated report is displayed in the browser window the group of controls related to the Export facility becomes available on the report toolbar.

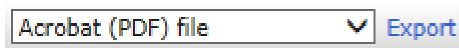


Figure 439 Exporting the Report

This dialog allows you to choose the format of the exported report.

2. First you should choose the format of the file to which the report would be saved. Choose one from the drop-down list.

   The following formats are available:

- PDF format;
- MS Excel 97-2003 format;
- Rich Text Format (file with RTF extension);
- Character Separated Values: a comma delimited format is available (file with CSV extension);
- TIFF format - the report is saved as a picture;
- Web Archive (file with the MHTML extension).

3. Click Export to start the export procedure. This will display the standard MS Internet Explorer dialog using which you can select whether the file should be saved or opened. If you choose the Save button, the standard Windows Save File dialog will be displayed, and you will have to enter the name and path to the file you want to save.

9.17. Printing the Generated Report

The generated report can be printed out on any printer currently installed in your system.

Note that before the file can be printed it is converted into the Adobe PDF format and can be opened for printing only in case an application capable of reading files in the PDF format is installed on your machine. If no such application is installed on your computer you still get a chance of saving the resulting PDF file in a location of your choice for printing it out at a later time.

Also note that the following reports could not be printed out following the described routine: Call Attempts, Interviewer Breaks, Interviewer Submission Details, and Aggregated Interviewer Submission.

To print out a report:

1. You can preview how the report will look like when it is printed. Click the Print Preview button  to display the printed version of the report in the CATI Supervisor window. This is the toggle button, pressing it will sequentially change the way the report is presented - from the online version to the printed version and back.

2. After the generated report is displayed in the browser window click the Print button  located above the report header. This will display the standard Adobe Reader Print dialog.

   This dialog allows setting up options required to print out the generated report.

3. Choose the desired print options and click Print to print out the report.

10. Administrator Settings

The CATI Supervisor module provides a GUI for controlling a range of extended options and background settings which are not accessible for a regular supervisor. These administrative settings are available on the Administration tab. As the name implies it is accessible only by persons who are granted administrative rights. This tab appears hidden for "regular" supervisors.

The Administration menu provides access to the following areas:

The Settings section

- The Settings section - the list of options which are used for locking the interviewer account and configuring a set of reports that can be emailed on a daily basis;

The System Settings section

- The System Settings section - a comprehensive list of database settings which allows for control over permissions, feature toggle and various feature options.

The Database Update Logs section

- The Database Update Logs section - the list of system database updates that have been run;

The Management section

- The Management section - the section providing possibility for a manual save of interviewer activity data;

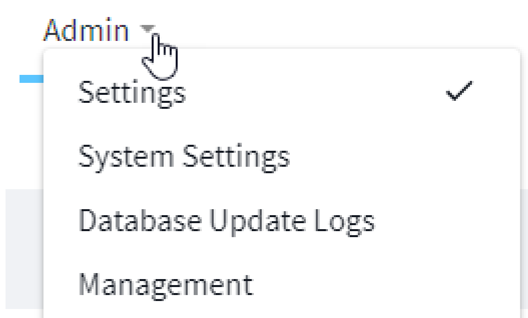


Figure 440 Administration menu

To access the Administration sections:

1. Choose **Admin** in the Navigation menu;
2. In the drop-down list that unfolds below select the required section. This will display the section interface.

10.1. Configuring Settings Related to the Entire Company

The CATI Supervisor module provides supervisor with the possibility of configuring a set of company related settings. These settings are listed in the Settings section of the Admin menu. They are grouped in tabs:

The **General** tab includes:

- some general settings;
- a configurable set of interviewer activity and productivity reports which could be sent on a daily basis;
- settings for routine maintenance actions

The **Interviewer console** tab includes:

- settings that help configuring buttons (and corresponding functions) available through the CATI Interviewer Console interface;

The **Security** tab includes:

- a security feature that helps locking an interviewer account and managing password expiration and reset settings;
- a security setting that allows enabling encryption of exported files.

10.1.1. General Settings Group

This group of settings can be found on the General tab (see the picture below).

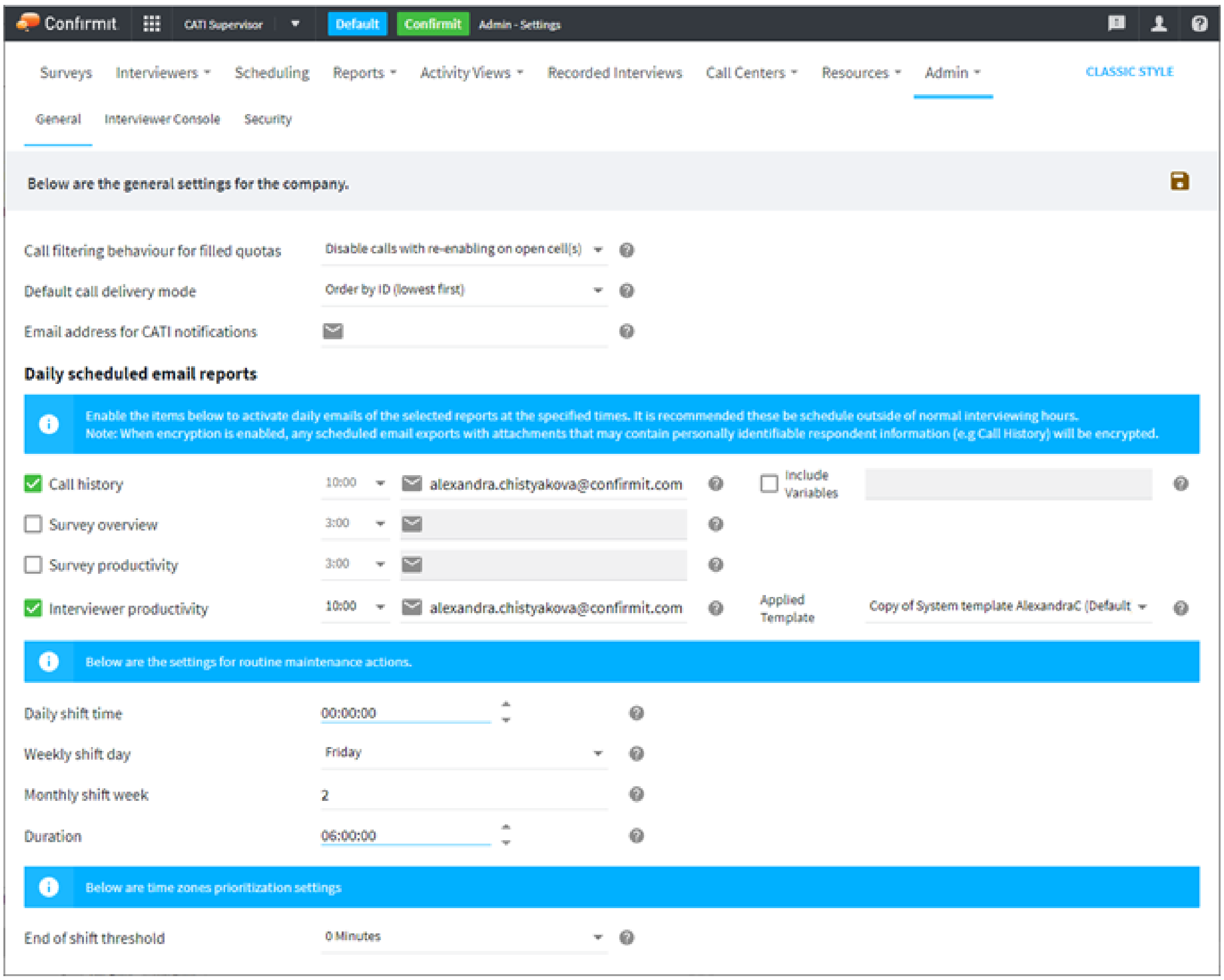


Figure 441 The General tab of the Resources menu

Call filtering behavior for filled quotas

The "Call filtering behaviour for filled quotas" option allows specifying how calls that belong to certain quota cell will behave when this quota is closed. It has two settings: "Change status and delete calls" and "Disable calls with re-enabling on open cells". Normally all calls belonging to the closed quota are assigned the extended status "Filtered by call delivery" and all their properties are reset upon quota closure. This happens when the default setting "Change status and delete calls" is selected for this option. When this option is set to "Disable calls with re-enabling on open cells", CATI interviews on quota closure will be set as disabled and will remain in the Scheduled Call list (the State column in the Call Management view will show "Disabled by Quota" for such scheduled calls). Properties of these calls will also be maintained, such as ‘Time to call’, ‘Priority’, ‘Shift’ and ‘Assignment’. If this quota cell is re-opened the interviews that used to belong to that quota cell will be re-enabled automatically.

Note: Calls that were disabled manually by a supervisor would not be re-enabled automatically upon quota cell re-opening (unlike calls that were disabled by the quota management rules). You can tell the manually disabled calls from those disabled by the quota management by the color coding - manually disabled calls are highlighted in the Call Management window in red while calls disabled by quota management are highlighted in yellow (see (go to Disabling and Enabling Calls on page 131 for more information) regarding the color highlighting of the disabled calls).

Note that there is another setting that allows you to specify that calls with certain extended statuses are not to be removed on quota closure(go to Viewing and Modifying the Extended Status Code Group Properties on page 338 for more information).

Specifying default call delivery mode for a company

This option allows to specify the default call delivery mode that will be applied to all newly launched surveys. This setting can be overridden on the survey level when another call delivery mode is specified on the General settings tab of the Survey View (see (go to Viewing and Modifying a Survey's General Properties on page 68 for more information)).

The following call delivery modes are available:

- Order by ID (lowest first) - when enabled, CATI interviews will be delivered to interviewers in the order with which they are found in the scheduled calls list (lowest ID first) unless some calls have been given a higher priority.
- Random order - when enabled, CATI interviews will be delivered in a random order, unless some calls have been given a higher priority.

Note that neither the default, nor the survey-level Call Delivery Mode setting should be changed while the respondent sample upload is in progress! This will lead to a situation where calls created for one part of the sample will be delivered in a mode which is different from the Call Delivery Mode for another part.

Setting up email address for CATI notifications

The email address(es) specified in this field will receive an email whenever a system event occurs, such as an interviewer account is locked out or notification of CATI Clean-Up.

Daily scheduled email reports' configuration

The supervisor can schedule emailing of the call activity and productivity reports to the selected users on a daily basis.

Emailed reports in case they contain PII can be encrypted to restrict access to the data they contain - refer to (go to The Security Settings Section on page 453 for more information) for information.

There are four report types that can be configured for delivery at the company level:

- Call history,
- Survey overview,
- Survey productivity,
- Interviewer productivity.

Emailing of each report type can be configured independently - you can enable/disable each report type, specify a list of email addresses and the time at which the email is sent.

The time at which reports would be emailed should run out of interviewing hours (where possible).

All report types are generated according to the pre-configured settings - they all provide information relating to the previous 24 hour activity of all interviewers belonging to the company.

The call history export is the same as an “Export Call History” action from the survey list for all surveys, including breaks. Note the additional option for the scheduled **Call History** report settings. This option is similar to that found in the Call History export dialog (see the Include Variables option description in (go to Exporting Call History Data on page 182 for more information)). Use this option to add columns (variables) to the Call History report scheduled for delivery. Multiple variables can be added to the report - use semicolon to separate them in the Include Variables field.

The other three reports are a PDF export of that report, for all surveys, all interviewers, including dialer attempts (where applicable), zero values are hidden (where applicable) and break times are not included in calculations (where applicable).

Additionally, the supervisor can specify a customized template to be used as default each time an Interviewer Productivity Report is exported according to the specified schedule (see (go to Creating and Editing the Interviewer Productivity Report Templates on page 410 for more information) for details on the customization of the Interviewer Productivity Report template). This is done by selecting a template name from the **Applied Template** drop-down list.

The report emailing settings can only be configured at the company level without any further customization of filtering and can be enabled for delivery once per day.

File attachment size for each email is limited to 10Mb, if the email attachment exceeds this limit the email will not be delivered, instead an error email will be sent.

Setting up automatic database maintenance operations

There is an opportunity to set up database maintenance operations to be performed automatically. Such operations include a range of routine maintenance operations which should be carried out regularly. They include operations like rebuilding of table indexes, cleanup of old history data, update of certain statistics, and survey cleanup operations. This set is already defined and the supervisor cannot change it.

The supervisor can specify the shift during which the routine maintenance operations should be performed. To do this the supervisor should:

1. First specify the time of the day when routine maintenance actions should start.
2. Then specify the day of the week when routine maintenance actions starts. The day time is based on daily shift day setting.
3. Then specify the monthly week number when the routine maintenance should be performed. The day of the week will depend on the setting applied for the weekly day shift. If the first week of the month is selected but the specified weekly shift day does not occur in this week then it will automatically be deferred to the same day in the second week.
4. Next specify duration of the shift. Mind that the shift's end time equals to the sum of the daily shift time and duration.

Automatic call prioritization based on time zones

You can enable a setting that will automatically give priority to calls in a certain time zone when the end of the interviewer's calling shift for this time zone approaches. To enable this setting, choose the time interval from the **End of shift threshold** on the Settings tab of the Resources page.

Here is an example which illustrates how this setting works. There is a survey that has calls in time zone #1 and also in time zone #2, which is 1 hour ahead of time zone #1 (time zone #1 + 1 hour). The interviewer's shift is due to end at 9 PM and it is almost 8 PM in time zone #1 and almost 9 PM in time zone #2. So the interviewer's shift is nearing the end in time zone #2. There is still plenty of interviews for him in time zone #1. If the interviewer continues receiving calls from the time zone #1 he is likely to finish the work without completing a single interview from time zone #2 (which is 1 hour ahead of the time zone #1). To make the most effective use of the remaining time the system can give priority to calls from time zone #2. In this case the interviewer will receive some calls from time zone #2 instead of calls from time zone #1 until his time runs out in time zone #2. This priority will come into effect X minutes before the end of the interviewer's shift, where X is the time interval chosen from the "End of shift threshold" drop-down box.

If the interviewer works in three or more time zones, calls from these time zones are delivered to them in a similar manner: when there is X minutes left until the end of his/her working shift in one time zone, calls from this time zone are automatically given priority over other calls.

If no time interval is selected (0 minutes), no calls are given priority.

10.1.2. Interviewer Console Settings Section

The Interviewer Console tab holds the settings as below:

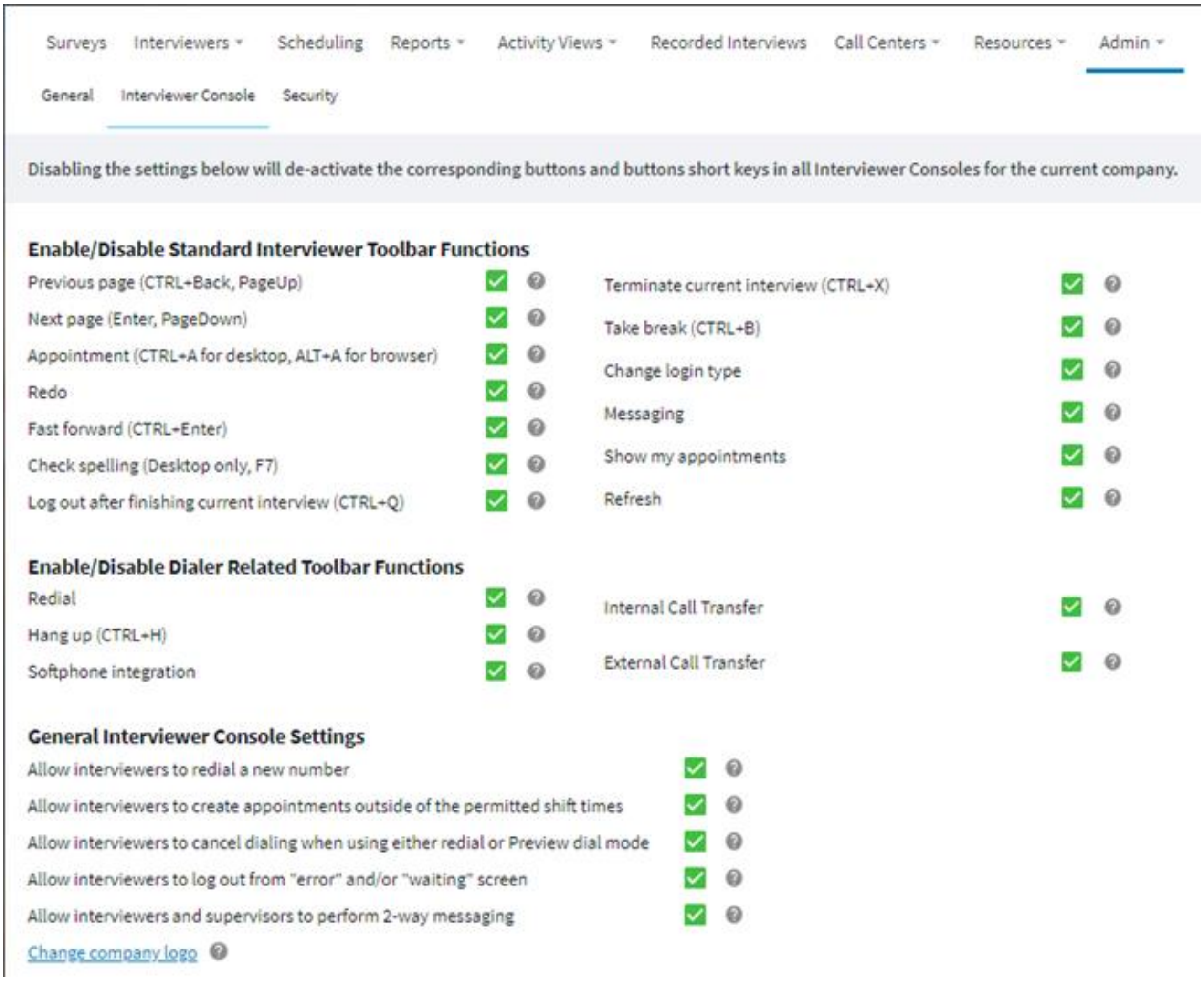


Figure 442 The Interviewer Console tab

Configuring functions available through the CATI Interviewer Console interface

The supervisor can enable or disable buttons in the Interviewer Console interface. This is a company wide setting that applies to ALL Interviewer Consoles. Changes to these settings will take effect the next time each interviewer logs in to work with the Interviewer Console. Disabling hides a button from view, while enabling displays the button. Disabling (hiding from view) prevents the interviewer from using the corresponding functions in the Interviewer Console (all hot key combinations corresponding to the button functionality are disabled when the button itself is disabled).

To disable (hide) a button on the Interviewer Console toolbar the supervisor should clear a box in front of the button name in the "Enable/Disable Interviewer Toolbar Functions" group. Ticking the box will enable (display) the button in the Interviewer Console.

If the supervisor disables the "Show My Appointments" button in the Interviewer Console toolbar, the "Show My Appointments" link in the Create Appointment dialog will also be hidden.

Functionality of the "Allow interviewers to redial a new number" option depends on whether the "Redial" button is enabled. When the Redial button is enabled the interviewer has the option to enter an alternative number to be dialed. If the "Allow interviewers to redial a new number" setting is unchecked the interviewer will only be able to redial the default number (the option to dial an alternative number will be removed) (go to The Redial Functionality on page 288 for more information).

There is an option that prevents interviewers from creating an appointment outside of their permitted working shift. This option is available in the "General Interviewer Console Settings" group and, when this check-box is cleared, it hides the corresponding option in the Appointment window (go to Making an Appointment on page 274 for more information).

The CATI Supervisor module provides an option which allows interviewers to cancel dialing while preview dialing is in progress or when making an attempt to dial a number via the redial feature. It can be turned on and off using the "Allow interviewers to cancel dialing when using either redial or Preview dial mode" option (go to Going Through an Interview on page 259 for more information). When turned on, it allows interviewer to cancel dialing in the Interviewer Console - a Cancel button is displayed in the working area of the Interviewer Console when dial or redial procedure is in progress.

Note that the Internal and External Call Transfer functionality must also be enabled in the System Settings tab by enabling the appropriate settings in the System Settings table.

You can change the company logo that is displayed to the interviewers in the upper-left corner of their screen. To do this, click the link towards the bottom of the Interviewer Console tab, enter the image's URL into the field, then click **Save**. Note that the image should be no larger than 165 x 46 pixels to fit into the logo location. If the image is hosted in the File Library then it will always be available

10.1.3. The Monitoring Console Settings

The supervisor can, in addition to the standard listening only monitoring mode, render assistance to an interviewer. This can be either in the form of spoken instructions or by directly taking part in a conversation with the respondent together with the interviewer.

There are two options in the Monitoring Console tab to enable or disable these functions:

- The **Coaching** mode option.
- The **Barging** mode option.

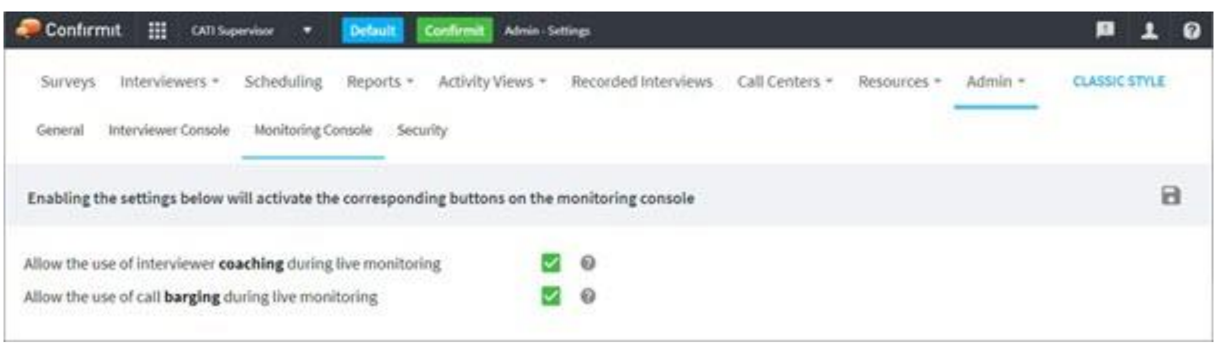


Figure 443 The Monitoring Console settings

Check or clear the appropriate box to enable or disable each option. When the option is enabled, the corresponding button is displayed on the Monitoring Console toolbar (go to Monitoring Interviewers' Work in Real Time on page 313 for more information). When the option is disabled, the button is hidden.

The "Allow the use of interviewer coaching during live monitoring" option allows the supervisor to whisper instructions to the interviewer whilst monitoring them, and the supervisor can hear the audio of both the interviewer and the respondent. The respondent cannot hear the supervisor.

The "Allow the use of call barging during live monitoring" option allows the supervisor to talk to both the interviewer and the respondent whilst monitoring the interviewer.

When the current interview is finished and the interviewer is delivered another interview whilst the supervisor keeps the Monitoring Console open and does not switch the monitoring mode the previously selected monitoring mode remains in effect. For example, if the supervisor has been monitoring the interviewer in the Coaching mode, they will continue monitoring the next interview in the same Coaching mode.

10.1.4. The Security Settings Section

This group of settings are located on the Security tab.

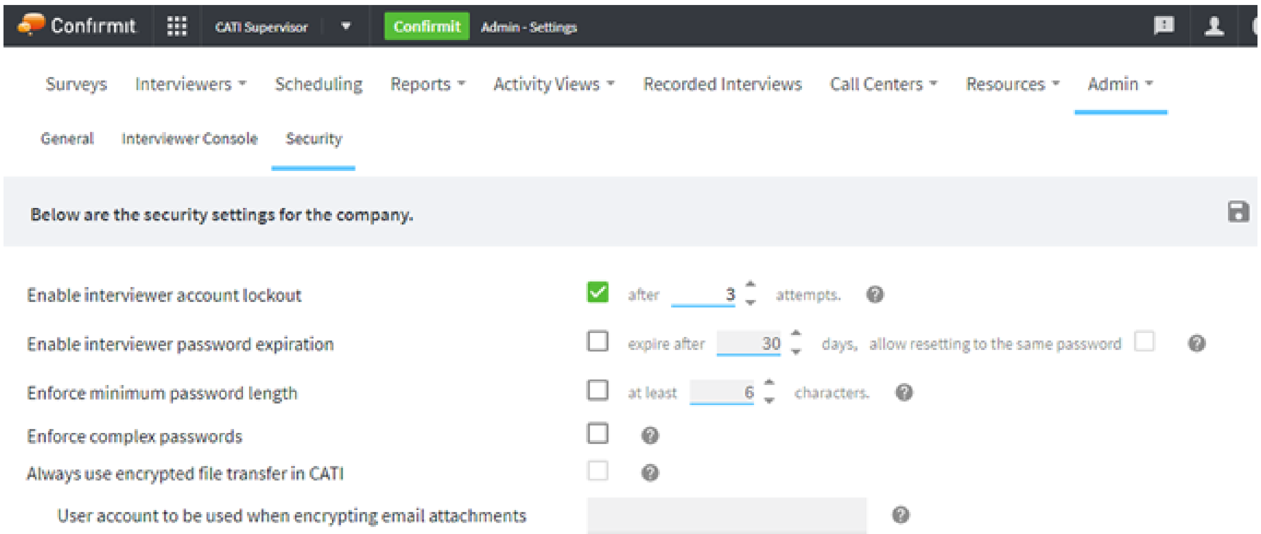


Figure 444 The Security tab of the Resources menu

Interviewer account locking

You can configure CATI Supervisor to perform automatic locking of any interviewer account in case there were more consecutive unsuccessful login attempts than it is specified in the corresponding setting.

When an interviewer's account is locked he/she would not be able to log into the system when they start the CATI Interviewer Console. The Console displays the appropriate warning message when such login attempt is executed, and it would not log the interviewer in.

Also any interviewer account can be locked and unlocked by the supervisor manually - this can be done by using a corresponding command from the Interviewers list (see (go to Locking and Unlocking the Interviewer's Account on page 33 for more information) for details).

Note that enabling the interviewer account locking option DOES NOT lock the interviewer account immediately - it only instructs the system to lock this account when the specified number of consecutive unsuccessful login attempts is reached. For immediate interviewer account locking, use the procedure described in (go to Locking and Unlocking the Interviewer's Account on page 33 for more information).

Automatic account locking option setup is performed on the Settings tab of the Resources object. To enable this option tick the box in front of the option name.

Automatic account locking settings are available company wide - they affect all interviewers belonging to the current company.

When an account is locked out an email will be sent to the address(es) specified.

Any interviewer account which has been locked by the system automatically can later be unlocked by the supervisor manually - refer to (go to Locking and Unlocking the Interviewer's Account on page 33 for more information) for instructions. Manual account unlocking is the only way to unlock the interviewer account that has been locked automatically.

Password management settings

There are options aiding in password management. These options are also company wide - they affect all interviewers belonging to the current company. To enable each option you should tick the box in front of the option name. The following options can be configured on the Settings tab:

- "Enable interviewer password expiration", which allows setting the limit for password expiration (in days), and specifying if the expired password could be reset to the same one as before;
- "Enforce minimum password length", which enables checking of the minimum number of symbols entered into the "Password" field when the password is created;
- "Enforce complex passwords", which enables checking if the newly created password contains at least 1 upper case character and 1 non-alphanumeric character. Passwords that fail to satisfy this rule are rejected.

Do not forget to click the **Save** button on the toolbar above the right frame whenever you alter any setting. The **Save** button starts blinking when you make any change to the settings prompting you to save the changes made.

Export file and report encryption

The CATI Supervisor module allows for compliance with laws and regulations regarding data transfer operations which involve personally identifiable information (PII). To this end all export operations, and also creation of reports which include PII, can produce files encrypted using the PGP encryption technology. This makes it possible to allow access to PII contained in such files only to persons who possess specific PGP private security key.

To enable this functionality in the CATI Supervisor module, the following settings in the Forsta Professional Authoring application must be configured:

- The "PGP Encryption" add-on module must be enabled;
- The "Always use encrypted file transfer" security option must be enabled.

Refer to the Forsta Professional Authoring user guide for information regarding these options.

When the above options are enabled in the Professional Authoring module, a corresponding option becomes accessible in the CATI Supervisor UI. The **Always use encrypted file transfer** option on the Security tab of the Settings menu (Resources tab in the Navigation menu) should be enabled to turn on encryption of exported files.

When the "Always use encrypted file transfer" box is checked, the following export files will be encrypted:

- Interview/call list (go to Exporting the Interview/call List on page 178 for more information)
- Call History (go to Exporting Call History Data on page 182 for more information) and a number of scheduled exports delivered by email as configured on the General tab of the Resources/Settings menu (go to General Settings Group on page 448 for more information)
- Telephone Number Blacklist (go to Creating and Managing the Telephone Number Blacklist on page 379 for more information).

This setting is applied for all users within the company who have access to the CATI supervisor UI. Only one user PGP key is used for encryption of all types of exported files. To specify which private key will be used for encryption, enter the name of the user account in the "User account to be used when encrypting email attachments" field.

When the above described procedures are carried out, encryption takes place automatically without any visual indication when the "Export" operation is performed. User does not have to take any extra action at this moment.

To disable the Export Encryption feature, uncheck the **Always use encrypted file transfer** box in the Security tab.

Only users with pre-configured private PGP encryption keys and software will be able to decrypt the encrypted export files.

10.2. Checking Database Update Logs

The Forsta system database is upgraded regularly. Usually such upgrade is done with the help of a script which is tailored upon each update to match current upgrade requirements. When the script is run the results of its work are recorded and can be reviewed later.

The Database Update Logs view contains the complete list of database updates performed from the moment of the fresh installation of the application up to the present moment.

To check database update logs

1. Go to the **Settings** tab in the Resources object menu in the Navigation frame.
2. Select the **Database update logs** object.

   The list of database updates is displayed.

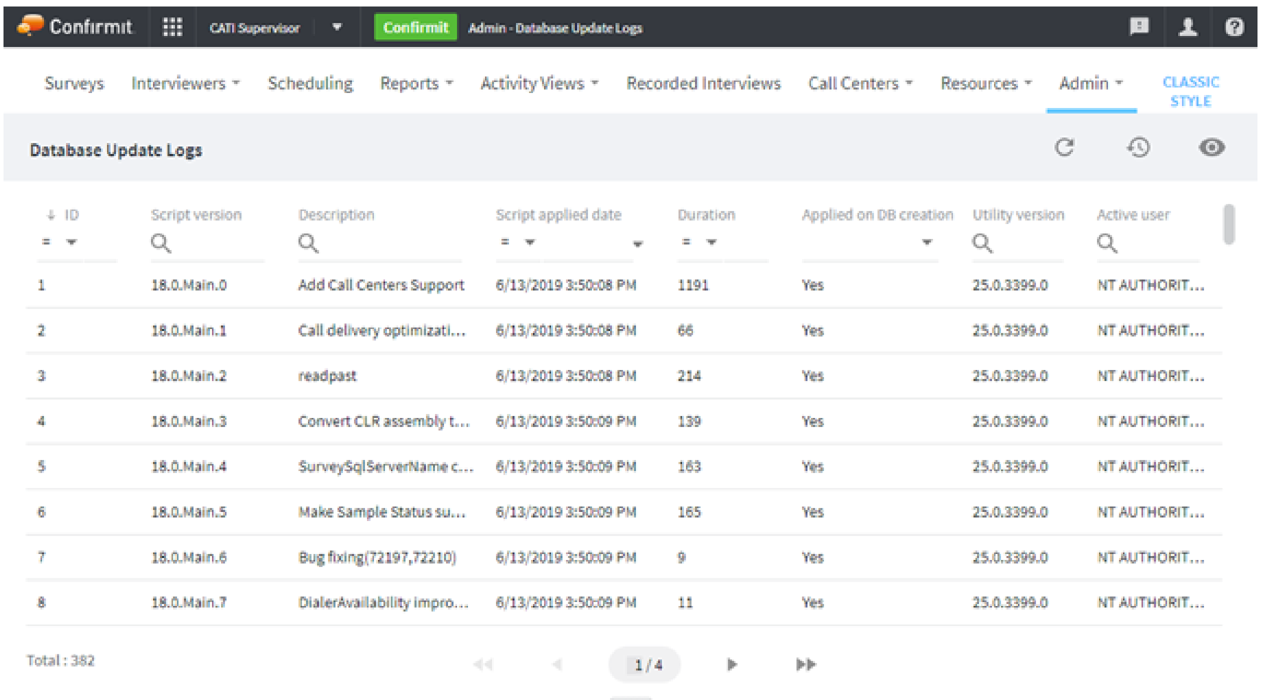


Figure 445 Checking the database update log list

The update list view provides the following information:

- update ID;
- Script version;
- Description - short description of the changes that have been introduced by the update;
- Script applied date;
- Duration - in seconds;
- Applied on DB creation - tells whether the script was run at the moment the database was created;
- Utility version - update utility version number. Normally corresponds to the CATI Supervisor build which was current at the moment the script was applied;
- Active user - a combination of the PC network name and the user name which identifies the person who initiated the update procedure.

You can browse details of each listed update. To do this either right-click the required update item in the list and choose **Details** from the context menu that appears, or choose an item in the list and click the **Details** button on the right frame toolbar. The Details dialog opens.

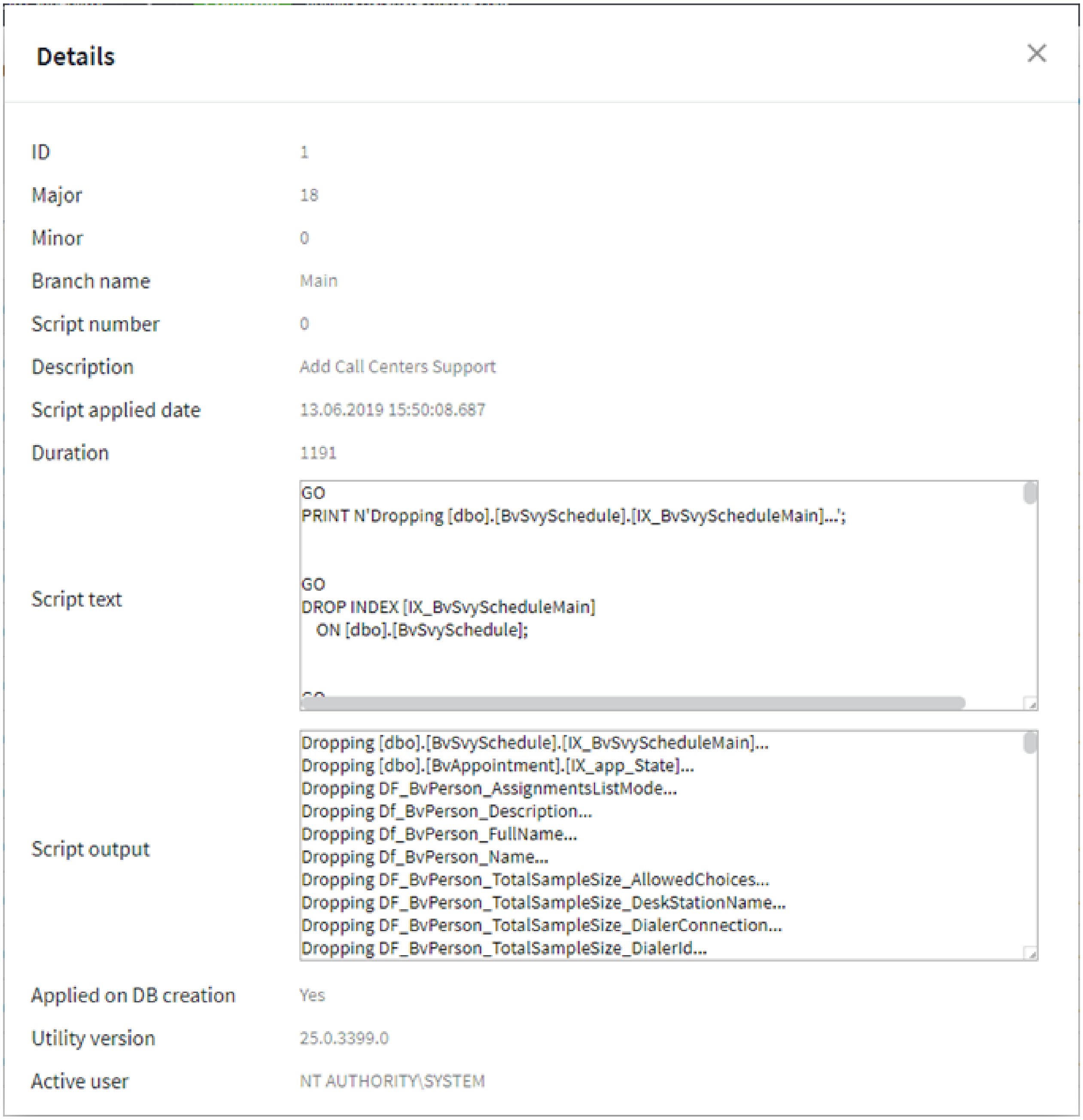


Figure 446 Checking database update details

The dialog contains further details of what was changed in the course of the update and how. In addition to the information contained in the list displayed in the right frame, this dialog provides some extra information. The most informative is the "Script" text field which contains the exact text of the script applied, and the "Script output" field which contains text output of the result of the script work.

10.3. Saving Interviewer Activity Data

The Forsta system saves data regarding interviewer activity to the database regularly at the end of each specified time period. The administrating supervisor can perform this action manually whenever required.

To save interviewer activity data:

1. Choose **Admin** in the Navigation frame then select **Management** in the drop-down menu. This will display a single button and a hint, as in the picture below.

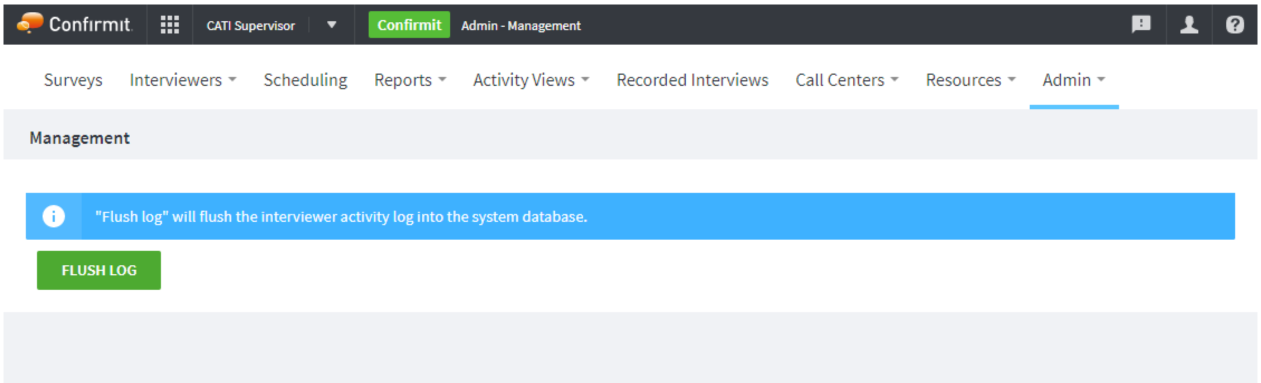


Figure 447 Saving the interviewer activity data manually

2. Click the **Flush log** button. You will not be prompted, the operation is performed silently. The appropriate data will be saved to the Forsta system database.

11. Appendix A - Action Parameter Descriptions

This is the list of the scheduling script actions and descriptions of their parameters.

Action name	Parameter	Description	Usage	Comment
Suspend the interview	n/a		Places the call into the "Not Scheduled" list while maintaining it's current status.	
Terminate the interview	n/a		Places the call into the "Not Scheduled" list while changing it's current status to be "Terminated".	
Set time to NOW	0 or 1	Enter 0 for a Shift type = “None”, or 1 for a Shift type = “Any Valid”.	The value specifies the time to call for the particular shift. "0" indicates that the call will be made regardless of the shift, "1" indicates that the call will be made only for the appropriate shift.	Generates a call. Schedules the call
Fulfill the specified appointment	number, min = 0	Enter the number of minutes before the appointment time. The value must not be empty.	Sets the time to call ASAP. The call will be made **n** minutes before the appointment time. The minimum value is "0" - this indicates the current time.	Generates a call. Schedules the call
Recall after a number of minutes	number, min = 1	Enter the number of minutes	Specifies the time to recall as n minutes after the call has ended.	Generates a call. Schedules the call. Sets Time to Call.
Recall after a number of shifts	number, min = 1	Enter the number of shifts. "1" indicates the next shift.	Specifies the time to recall as n shifts after the current shift. Time to call is set precisely at the shift start.	Generates a call. Schedules the call. Sets Time to Call.
Recall after a number of shifts (random time)	number, min = 1	Enter the number of shifts. "1" indicates the next shift.	Specifies the time to recall as n shifts after the current shift. Time to call is set randomly (whenever the call can be made) within the specified shift.	Generates a call. Schedules the call. Sets Time to Call.
Recall on the next shift of the specified type	number, range = Shift Type ID	Enter the Shift Type ID. Only existing Shift Type ID values are supported.	Specifies the time to recall for the specified shift type. Time to call is set precisely at the shift start.	Generates a call. Schedules the call. Sets Time to Call.
Recall on the next shift of the type specified by variable	String	Enter a quantity variable name. The survey must contain the referred variable.	Specifies the time to recall for the specified shift type. Time to call is set precisely at the shift start.	Generates a call. Schedules the call. Sets Time to Call.
Recall after a number of shifts specified by variable	String	Enter a quantity variable name. The survey must contain the referred variable.	Specifies the time to recall for the specified shift type. Time to call is set precisely at the shift start.	Generates a call. Schedules the call. Sets Time to Call.

Recall on the specific shift	number, range = Shift ID	Enter the Shift ID. Only existing Shift ID values are supported.	Specifies the time to recall for the specified shift type. Time to call is set precisely at the shift start.	Generates a call. Schedules the call. Sets Time to Call.
Recall on the shift specified by variable	String	Enter a quantity variable name. Variable value can be set to the specific shift name, or to "None".	Specifies the time to recall for the specified shift type. Time to call is set precisely at the shift start. Shift name set to "None" will cause the call to be made at the start of the appropriate shift.	Generates a call. Schedules the call. Sets Time to Call.
Recall on specific time	valid date and time, dd/mm/yyyy hh:mm	Enter the time value in the following format: **dd/mm/yyyy hh:mm**. Only valid date and time values are supported.	Specifies the time to recall within the current shift.	Schedules the call. Sets Time to Call.
Set Next Rule	number, range = Rule number	Enter the Next Rule ID. Only existing Rule ID values are supported.	Specifies the number of rule for the next call to start searching from. This means that rules in the list to be used for the next call are searched forward starting with the specified rule.	Generates a call. Updates the call properties
Set new Extended Status	number, Min = 1, Max = 120	Enter the new Extended Status	Changes the Extended Status of a call.	Updates the call properties
Set new Call Priority	number, min = 1	Enter the new call priority value	Changes the Priority value of a call.	Generates a call. Updates the call properties
Increment Priority	number, min = 1	Enter the value to increment the current priority by	Increments the Priority value of a call by the specified value.	Generates a call. Updates the call properties
Decrement Priority	number, min = 1	Enter the value to decrement the current priority by	Decrements the Priority value for a call by the specified value.	Generates a call. Updates the call properties
Assign User/Group(s)	number, Person ID or Group ID, -1, -2, -3	Enter Interviewer ID or Group ID or a list of Group IDs separated by comma, -1 for "Unchanged", -2 for "Last Person", -3 to set no specific assignment	Assigns a specified person/group to a specified interview, or removes the specified assignment. Also creates a multiple assignment in case a number of groups is specified.	Generates a call. Updates the call properties
Set Call expiration timeout	number, min = 1	Enter the timeout value in minutes	Sets the expiration timeout counting from the specified Time to Call. Should be used ONLY along with an action that sets 'Time To Call' (e.g. Recall after a number of Shifts, Recall on Specific Time and similar actions can be used to that end - see action description in the Comment column).	Generates a call. Updates the call properties
Set Call expiration time	valid datetime, dd/mm/yyyy hh:mm	Time format: **dd/mm/yyyy hh:mm**	Sets the expiration time of a call.	Generates a call. Updates the call properties

			Should be used ONLY along with an action that sets 'Time To Call' (e.g. Recall after a number of Shifts, Recall on Specific Time and similar actions can be used to that end - see action description in the Comment column).	
Set Shift Type	number, Shift Type ID, 0, -1	Enter the Shift Type ID, 0 for "Any Valid", -1 for "None"	Specifies the shift type, during which the call will be due.	Generates a call. Updates the call properties
Increment quantity variable	String	Enter a quantity variable name	Increments the quantity variable value by one. Can only be used with normal variables (not to be used with background variables).	Updates the call properties
Special increment quantity variable	String	Enter a quantity variable name	Increments the quantity variable value by one. Should be applied in case the Extended Status of a call has not changed since the last time. Can only be used with normal variables (not to be used with background variables).	Updates the call properties
Decrement quantity variable	String	Enter a quantity variable name	Decrements the quantity variable value by one. Can only be used with normal variables (not to be used with background variables).	Updates the call properties
Special decrement quantity variable	String	Enter a quantity variable name	Decrements the quantity variable value by one. Should be applied in case the Extended Status of a call has not changed since the last time. Can only be used with normal variables (not to be used with background variables).	Updates the call properties
Reset quantity variable	String	Enter a quantity variable name. The specified variable must allow zero values.	Changes the variable value to a zero. Can only be used with normal variables (not to be used with background variables).	Updates the call properties
Special reset quantity variable	String	Enter a quantity variable name	Changes the variable value to a zero. Should be applied in case the Extended Status of a call has not changed since the last time. Can only be used with normal variables (not to be used with background variables).	Updates the call properties
Assign value to quantity variable	string, quantity variable name = value	Enter a quantity variable name and its value.	Assigns a new value to the variable. Can only be used with normal variables (not to be used with background variables).	Updates the call properties
Assign function call result to variable	string, quantity variable name = function name	Enter a quantity variable name and a function name	Assigns the result of a function call to a specified variable. Can only be used with normal variables (not to be used with background variables).	Updates the call properties

Add a group to a multiple assignment	number(s), Group ID(s)	Enter a group ID or a list of Group IDs separated by commas	Adds a group or a number of groups to an already existing multiple assignment. This action does not replace an existing assignment!	Updates the call properties
Remove a group from a multiple assignment	number(s), Group ID(s)	Enter a group ID or a list of Group IDs separated by commas	Removes a group or a number of groups from an already existing multiple assignment.	Updates the call properties
Go To	string, SubRule number	Enter the sub-rule number. Current sub-rule number is not allowed.	Specifies the sub-rule to be executed next (right after the current action).	
Run custom script	n/a	Enter the name of the function contained in the custom script	Specifies the custom script to be run.	Generates a call.
Stop execution	n/a		Stops the current rule execution. Search for the next rule is canceled.	
Set dialing mode	2 or 0	Enter "2" for switching to Preview dial mode, or "0" to reset the dial mode to the survey-level dial mode setting.	Temporarily switches a single interview to the Preview mode when the Predictive mode is set for the whole survey.	Updates the call properties
Disable call	n/a		Prevents a call from being delivered to an interviewer while retaining all of its properties - sets the "Disabled" mark for the selected call(s).	Generates a call. Updates the call properties
Enable call	n/a		Turns a disabled call back into a regular call (removes the "Disabled" mark).	Generates a call. Updates the call properties
Restore previous call attributes	n/a		Restores all call atributes that were specified for that call before it was assigned the Returned Not Dialed or Returned Dialer Expired extended status.	Updates the call properties

12. Appendix B - List of Known Limitations

Below is the recommended limitation list.

1. Although the number of CATI interviewers and CATI interviewer groups that can be created in the system is unlimited, we recommend not more than 1000 in total exist at any one time.
2. Although the number of scheduling routines that can be created in the system is unlimited, we recommend not more than 100 exist at any one time.
3. Although the number of extended status groups that can be created in the system is unlimited, we recommend not more than 100 exist at any one time.
4. Although the number of filters that can be created in the system is unlimited, we recommend not more than 50 exist per survey.
5. If you try executing the "Move and Reschedule" action for more than one thousand interviews/calls in one pass, than, for performance reasons, CATI Supervisor executes this action only for one thousand interviews/calls. Properties of the rest interviews/calls will not change.

13. Appendix C - List of Hot-Key Combinations used with CATI Interviewer Console

This appendix contains a list of hot key combinations used to perform actions in CATI Interviewer Console (go to Keyboard Support in the CATI Interviewer Console on page 268 for more information).

Action	Hot key combinations	Comment
One page back	Ctrl+Backspace, or PgUp	Takes you to the previous question page, and submits the current page
One page forward	Enter, or PgDn	Takes you to the next question page, and submits the current page
Make an appointment	Ctrl+A	
Fast forward	Ctrl+Enter	
Log out after the current interview is finished	Ctrl+Q	
Hang up the respondent line	Ctrl+H	
Terminate an interview	Ctrl+X	
Choose the default answer	Ctrl+D	
Choose the refused answer	Ctrl+R	
Spell check the "free text" answers on the current page	F7	
Take a break in the work	Ctrl+B	Used to switch the Console to the Break mode. Action initiated depends on the situation (go to Interviewer on a Break on page 272 for more information).
Submit the question page (when all required answers are provided)	Enter	The keyboard entry box should be empty when Enter is pressed
Resubmit the page in case of the loss of connectivity	F5	
Highlight the previous question on the current page	Up cursor key, or Shift+Tab	Used with all Grid question types
Highlight the next question on the current page	Down cursor key, or Tab	Used with all Grid question types
Highlight the first sub question (if any) of the current question	Home	Used with all Grid question types
Highlight the last sub question (if any) of the current question	End	Used with all Grid question types

Highlight the first sub question (if any) of the first question on the current page	Ctrl+Home	Used with 3D Grid question types
Highlight the last sub question (if any) of the last question on the current page	Ctrl+End	Used with 3D Grid question types
Move focus back from the keyboard entry text box	F2	Used with the Open/Multi question types
Move focus to the keyboard entry text box	Esc	Used with the Open/Multi question types

14. Appendix E - Time Zone List

Below is the universal reference list of time zones. Bias is shown in minutes.

ID	Name	Bias
1	(GMT) Greenwich Mean Time : Dublin, Edinburgh, Lisbon, London	0
2	(GMT) Monrovia, Reykjavik	0
3	(GMT+01:00) Amsterdam, Berlin, Bern, Rome, Stockholm, Vienna	-60
4	(GMT+01:00) Belgrade, Bratislava, Budapest, Ljubljana, Prague	-60
5	(GMT+01:00) Brussels, Copenhagen, Madrid, Paris	-60
6	(GMT+01:00) Sarajevo, Skopje, Warsaw, Zagreb	-60
7	(GMT+01:00) West Central Africa	-60
8	(GMT+02:00) Athens, Bucharest	-120
9	(GMT+02:00) Nicosia	-120
10	(GMT+02:00) Cairo	-120
11	(GMT+02:00) Harare, Pretoria	-120
12	(GMT+02:00) Helsinki, Kyiv, Riga, Sofia, Tallinn, Vilnius	-120
13	(GMT+02:00) Jerusalem	-120
14	(GMT+03:00) Baghdad	-180
15	(GMT+03:00) Kuwait, Riyadh	-180
16	(GMT+04:00) Moscow, St. Petersburg, Volgograd	-240
17	(GMT+03:00) Nairobi	-180
18	(GMT+03:30) Tehran	-210
19	(GMT+04:00) Abu Dhabi, Muscat	-240
20	(GMT+04:00) Yerevan	-240
21	(GMT+04:30) Kabul	-270
22	(GMT+06:00) Ekaterinburg	-360
23	(GMT+05:00) Tashkent	-300
24	(GMT+05:30) Chennai, Kolkata, Mumbai, New Delhi	-330
25	(GMT+05:45) Kathmandu	-345
26	(GMT+07:00) Novosibirsk	-420
27	(GMT+06:00) Astana	-360
28	(GMT+05:30) Sri Jayawardenepura	-330
29	(GMT+06:30) Yangon (Rangoon)	-390
30	(GMT+07:00) Bangkok, Hanoi, Jakarta	-420
31	(GMT+08:00) Krasnoyarsk	-480
32	(GMT+08:00) Beijing, Chongqing, Hong Kong, Urumqi	-480
33	(GMT+08:00) Irkutsk	-540
34	(GMT+08:00) Kuala Lumpur, Singapore	-480
35	(GMT+08:00) Perth	-480
36	(GMT+08:00) Taipei	-480
37	(GMT+09:00) Osaka, Sapporo, Tokyo	-540
38	(GMT+09:00) Seoul	-540
39	(GMT+10:00) Yakutsk	-600
40	(GMT+09:30) Adelaide	-570
41	(GMT+09:30) Darwin	-570
42	(GMT+10:00) Brisbane	-600

ID	Name	Bias
43	(GMT+10:00) Canberra, Melbourne, Sydney	-600
44	(GMT+10:00) Guam, Port Moresby	-600
45	(GMT+10:00) Hobart	-600
46	(GMT+11:00) Vladivostok	-660
47	(GMT+11:00) Solomon Is., New Caledonia	-660
48	(GMT+12:00) Auckland, Wellington	-720
49	(GMT+12:00) Fiji	-720
50	(GMT+13:00) Nuku'alofa	-780
51	(GMT-01:00) Azores	60
52	(GMT-01:00) Cape Verde Is.	60
53	(GMT-02:00) Mid-Atlantic	120
54	(GMT-03:00) Brasilia	180
55	(GMT-03:00) Cayenne, Fortaleza	180
56	(GMT-03:00) Greenland	180
57	(GMT-03:30) Newfoundland	210
58	(GMT-04:00) Atlantic Time (Canada)	240
59	(GMT-04:00) Georgetown, La Paz, Manaus, San Juan	240
60	(GMT-04:00) Santiago	240
61	(GMT-05:00) Bogota, Lima, Quito	300
62	(GMT-05:00) Eastern Time (US & Canada)	300
63	(GMT-05:00) Indiana (East)	300
64	(GMT-06:00) Central America	360
65	(GMT-06:00) Central Time (US & Canada)	360
66	(GMT-06:00) Guadalajara, Mexico City, Monterrey	360
67	(GMT-06:00) Saskatchewan	360
68	(GMT-07:00) Arizona	420
69	(GMT-07:00) Chihuahua, La Paz, Mazatlan	420
70	(GMT-07:00) Mountain Time (US & Canada)	420
71	(GMT-08:00) Pacific Time (US & Canada)	480
72	(GMT-09:00) Alaska	540
73	(GMT-10:00) Hawaii	600
74	(GMT+13:00) Samoa	- 780
75	(GMT-12:00) International Date Line West	720
76	(GMT-03:00) Buenos Aires	180
77	(GMT+04:00) Baku	-240
78	(GMT+06:00) Dhaka	-360
79	(GMT-04:00) Cuiaba	240
80	(GMT-06:00) Guadalajara, Mexico City, Monterrey	360
81	(GMT) Coordinated Universal Time	0
82	(GMT+04:00) Tbilisi	-240
83	(GMT+02:00) Amman	-120
84	(GMT+03:00) Kaliningrad, Minsk	-180
85	(GMT+12:00) Petropavlovsk-Kamchatsky - Old	-720
86	(GMT+12:00) Magadan	-720
87	(GMT+04:00) Port Louis	-240
88	(GMT+02:00) Beirut	-120
89	(GMT-03:00) Montevideo	180

ID	Name	Bias
90	(GMT) Casablanca	0
91	(GMT-07:00) Chihuahua, La Paz, Mazatlan	420
92	(GMT+01:00) Windhoek	-60
93	(GMT-08:00) Baja California	480
94	(GMT+05:00) Islamabad, Karachi	-300
95	(GMT-04:00) Asuncion	240
96	(GMT+02:00) Damascus	-120
97	(GMT+02:00) Istanbul	-120
98	(GMT+08:00) Ulaanbaatar	-480
99	(GMT+12:00) Coordinated Universal Time+12	-720
100	(GMT-02:00) Coordinated Universal Time-02	120
101	(GMT-11:00) Coordinated Universal Time-11	660
102	(GMT-04:30) Caracas	270
103	(GMT-03:00) Salvador	180

15. Appendix F - List of Predefined Extended Statuses

A web survey interview can assume one of several of statuses, for example Complete, Screened or QuotaFull. In CATI, a number of additional statuses (Extended Statuses) are used to record the various outcomes a call may terminate with, for example Busy, No reply, Appointment (for a follow up call) etc. Below is the list of the predefined Extended Status names, codes, and descriptions. Note that the names and codes of the predefined statuses cannot be changed.

Code	Extended Status name	Description
1	Appointment	Interview abandoned with an appointment time captured to call the respondent back
2	Busy	Respondent already on a call
3	No reply	Respondent not answering
4	Quota failure	Quota target for the respondent already fulfilled
5	Refusal	Respondent refused to be interviewed
6	Terminated	Call abandoned
7	Answer phone	Call answered by answer phone (voicemail)
8	Modem	Call to modem number
9	Fax	Call to fax number
10	Congestion	Call reported congestion on the line (telephony specific)
11	Unobtainable	Invalid number
12	Nuisance	Respondent hung up call before being delivered to the interviewer
13	Completed	Interview completed
14	Screened	Respondent screened out by interview condition(s)
15	Returned not dialed	The call was returned from the dialer without having a dial attempt (predictive dialing mode specific)
16	Fresh sample	Respondent contact awaiting interview
17	Blacklist	Respondent's number is on the telephone blacklist
18	Not automatically dialed	Manually dialed call.
19	Status not sensed	Automatic dialer unable to identify call type
20	Transfer to Web	Respondent assigned for Web interview
21	Transfer to CATI	Respondent assigned for Computer Assisted Telephone Interview
22	Transfer to CAPI	Respondent assigned to Computer Assisted Personal Interview
23	Transfer to IVR	Respondent assigned to Interactive Voice Response system
24	Interrupted by interviewer	The call was aborted by the interviewer.
25	Returned dialer expired	Call was returned from the dialer due to its dialer call expiration time being reached (predictive dialing mode specific)
26	Interrupted by system	Call was interrupted by the system
27	Filtered by call delivery	Call was removed from the call queue due to its quota being full
28	Stopped	Call was stopped by the dialer (telephony specific)
29	Telephony failure	Technical fault with telephone system, unable to contact respondent
30	Error	Fault occurred during call
1000	Inbound Call	Inbound Call
1001	Inbound call dropped by respondent	Inbound call dropped by respondent
1010	Internal Transfer	The call was transferred from an IVR agent to a "live" interviewer
1011	External Transfer	The call was transferred to an external number
1012	Canceled Transfer	Transfer procedure was canceled by an interviewer who initiated it

1020	Dial interrupted by interviewer	Dial dropped by interviewer
1021	Externally validated number	A status that can be used for a custom purpose, for example where a call has been processed by an external validation routine.
1051	Survey script error	Survey script error

16. Appendix G - List of Dialer-Related Error Messages

Below is the list of the error messages which are displayed in the CATI Interviewer Console in case a telephony related problem occurs.

Error message text
Unknown user
Incorrect user state
Already logged in
Dialer unavailable
Internal dialer error
Incorrect extension
Resource <x> is in use
Resource <x> not found
No licence
Incorrect number
No conference resource
No free channels
Internal dialer error
Dialing in progress
Dialer paused
Resource <x> is busy
Dialer error
Unknown supervisor
User not logged in
Already monitored
Incorrect dial mode
Dialer restarted
No supervisor resources available
Phone number already in use
User already being monitored

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