Confirmit CATI Supervisor User Guide

Confirmit Horizons v2020

This is revision 2 of the Confirmit Horizons v2020 CATI Supervisor User Guide published in August 2020. The information herein describes Confirmit Horizons CATI Supervisor and its features as of Build nr. 2020.8.0. 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.

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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 Confirmit 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 Confirmit Horizons v2020 CATI Supervisor User Guide:

- A number of general edits and corrections have been made in the text throughout the manual.
- The text and illustrations in the News Notifications section are updated (go to News Notifications on page 2 for more information).
- The Tree List section is removed as it is no longer applicable.
- The Record List ... section is renamed to The Survey List (go to The Surveys List on page 5 for more information).
- The text and illustration in the Object Properties View section are updated (go to Object Properties View on page 10 for more information).
- The text and illustration in the Viewing the Quota Promotion History section are updated (go to Viewing the Quota Promotion History on page 100 for more information).
- The text and illustration in the Viewing the Active Call List section are updated (go to Viewing the Active Call List on page 135 for more information).
- The text and illustration in the Editing a Call section are updated (go to Editing a Call on page 144 for more information).
- The Making Assignments in the Survey Assignments Dialog section is removed as it is no longer applicable.
- The Performing De-assign Operations... section is removed as it is no longer applicable.
- The Viewing Survey and Interviewer Assignments... section is removed as it is no longer applicable.
- The Question Types section is removed.
- The text and illustration in the Monitoring Console Settings section are updated (go to The Monitoring Console Settings on page 466 for more information).

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@confirmit.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 Confirmit Horizons v2020 System requirements document for a complete list of system requirements for the Confirmit Horizons software. A section of the document is dedicated to the CATI Supervisor module. You can download the document from the Confirmit 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 Confirmit Horizons software. In this you will already have logged into the Confirmit Horizons 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.

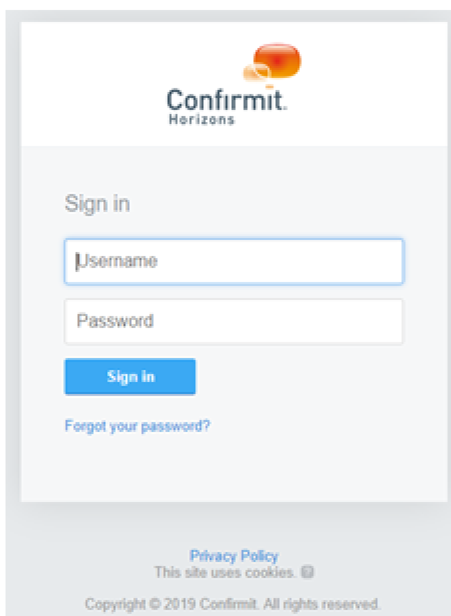


Figure 1 User login form

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 Confirmit Horizons software applications with the help of 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 Confirmit. 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.

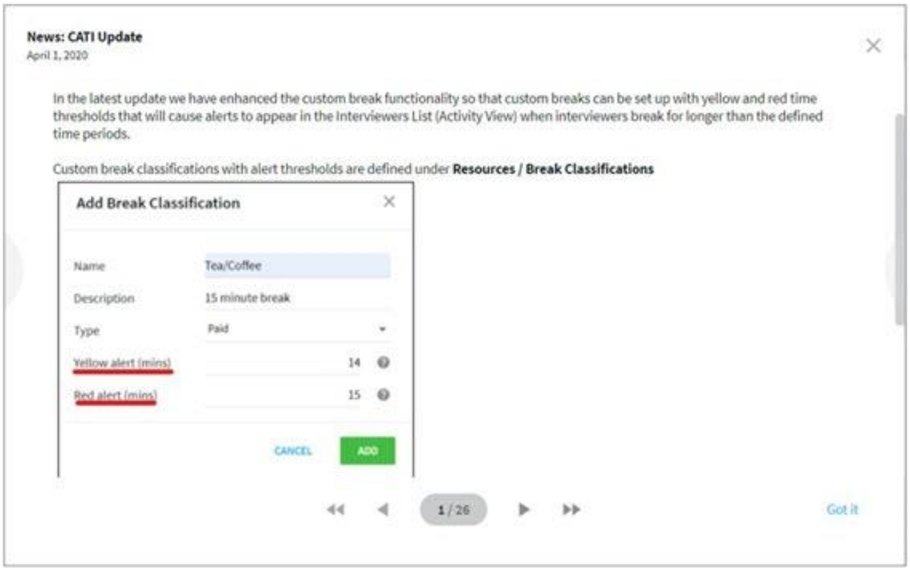
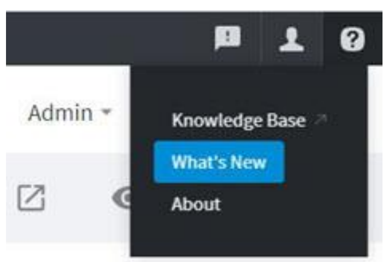


Figure 2 Example of the News window

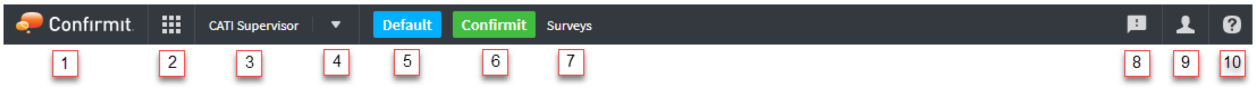
To close the window and proceed to the CATI Supervisor module, click on either the **Got** it or **X** buttons in the News window. The news item will then not be displayed again the next time the user logs in. It is however possible to review all news items by choosing the **What's New** item from the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



1.4. The Confirmit Horizons Toolbar

The Confirmit Horizons Toolbar is located in the header frame. It provides the user with links that allow visiting the Confirmit Horizons homepage, selecting some basic options related to the CATI Supervisor module, navigating through available Confirmit Horizons applications and managing Confirmit Horizons user settings. Similar toolbars are used with other Confirmit Horizons applications.

The picture below shows the Confirmit Horizons Toolbar and the list below explains available control elements.



1. The Horizons Homepage link (The Confirmit logo) - takes the user to the Home Page common to the majority of Confirmit's applications. When you first log in to the Confirmit Horizons this page opens, and it provides access to all the Confirmit applications that you are licensed to use. The Home Page includes a list of Confirmit 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 Confirmit application or application update).

2. The Global Navigation icon - is common to the majority of Confirmit's applications. Click the icon to open a selection overlay providing access to all the other Confirmit applications that you are licensed to use, and to the Horizons Homepage. If you are logged in to Horizons 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 Confirmit Horizons application the user is currently logged in.

4. The drop-down list of Recent Surveys - these are the surveys which contain interviews that had their extended status changed recently (see (go to Recent Surveys on page 128 for more information) 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 (see (go to Viewing and Modifying a Survey's General Properties on page 72 for more information)).

5. The Call Center button - shows the name of the current call center, when pressed, opens the list of call centers.

6. The Company button - this button shows the name of the current the company. When pressed, the button unfolds the drop-down list of companies to which the user can switch (e.g. "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 entering and sending feedback information.

9. The User Menu button - unfolds an action submenu 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 Horizons, 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 that logs the user out of the CATI Supervisor system. If the user is logged in to other Confirmit Horizons 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

1.5.1. The Navigation Menu

The Navigation Menu is located under the Confirmit Toolbar (the header frame of the CATI Supervisor module window). The Navigation Menu in the CATI Supervisor module groups objects according to their types: choosing an object in this menu displays a grid populated with records (see the illustration below).

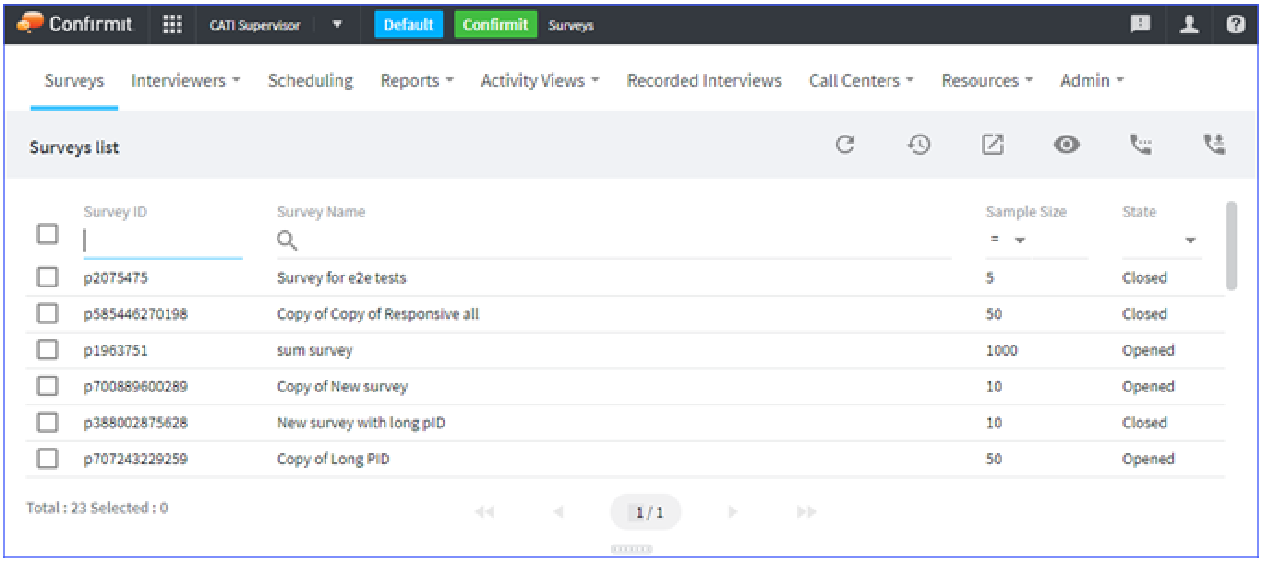


Figure 3 Choosing a Navigation Menu item displays a grid with a list of records

When chosen, some items in the Navigation Menu unfold a submenu (for example, choosing the Call Centers menu item unfolds a submenu - see the illustration below). Choosing an item in this submenu displays a grid populated by records.

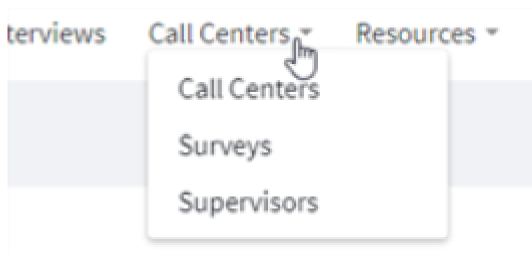


Figure 4 Choosing a Navigation menu item displays a submenu

Activity Views is a special section - it unfolds a submenu with items bearing a special mark next to them and choosing any object in this submenu opens a view in a separate window.

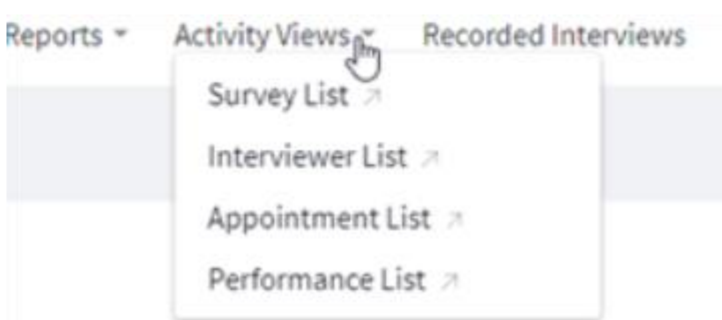


Figure 5 Activity Views are displayed in a separate window

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.

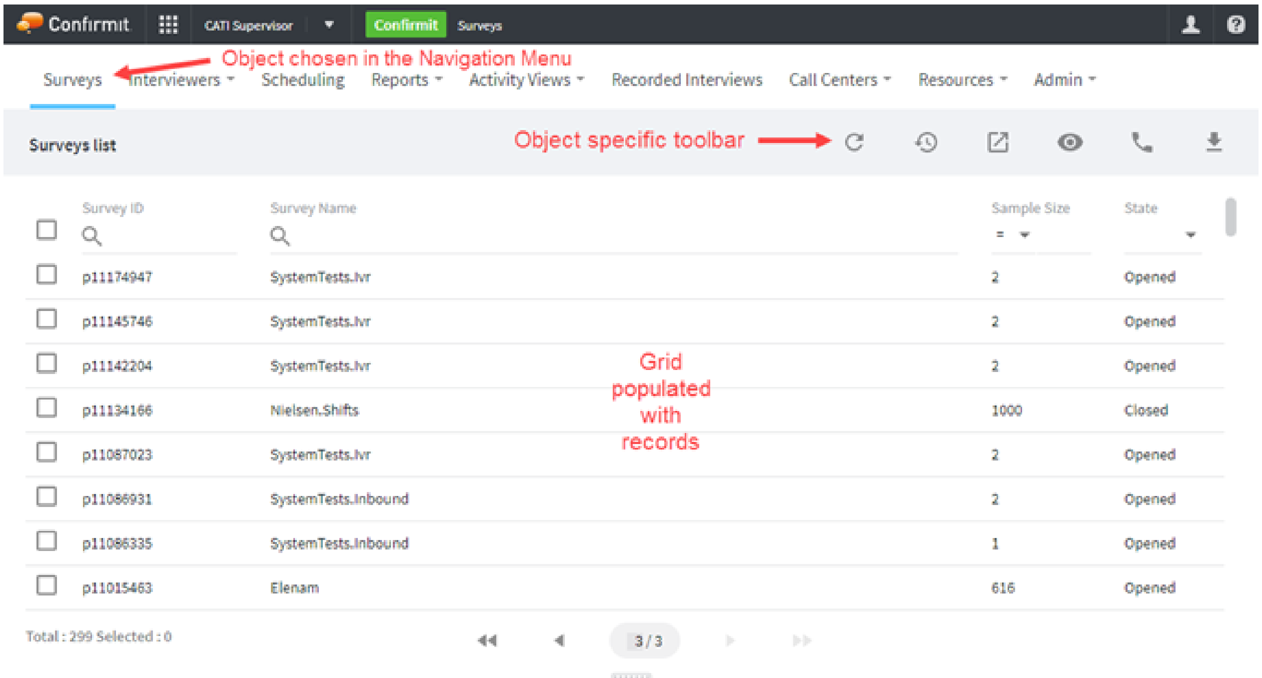


Figure 6 The list of survey records

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.

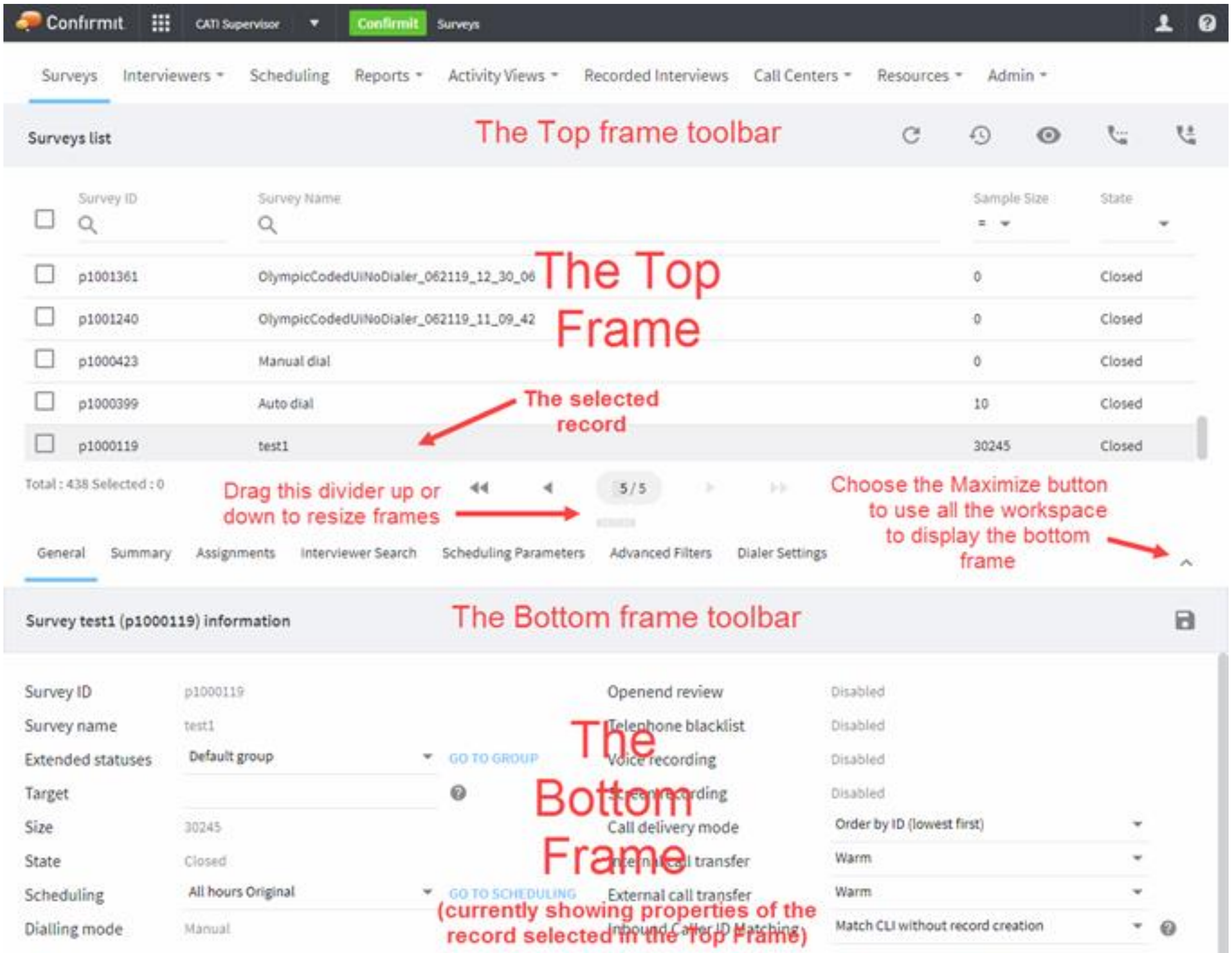


Figure 7 The list of survey records displayed in the top frame and properties of the selected survey displayed in the bottom frame

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.

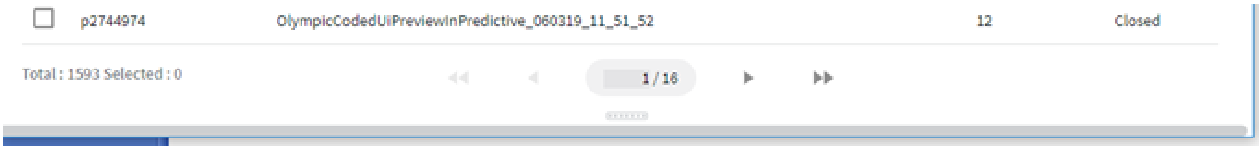


Figure 8 Status bar contains grid browse controls

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 table contents by a column, click the column header. Each subsequent click toggles the column sorting between ascending and descending. The sorting order is indicated by an arrow icon displayed in the column header and pointing up or down.

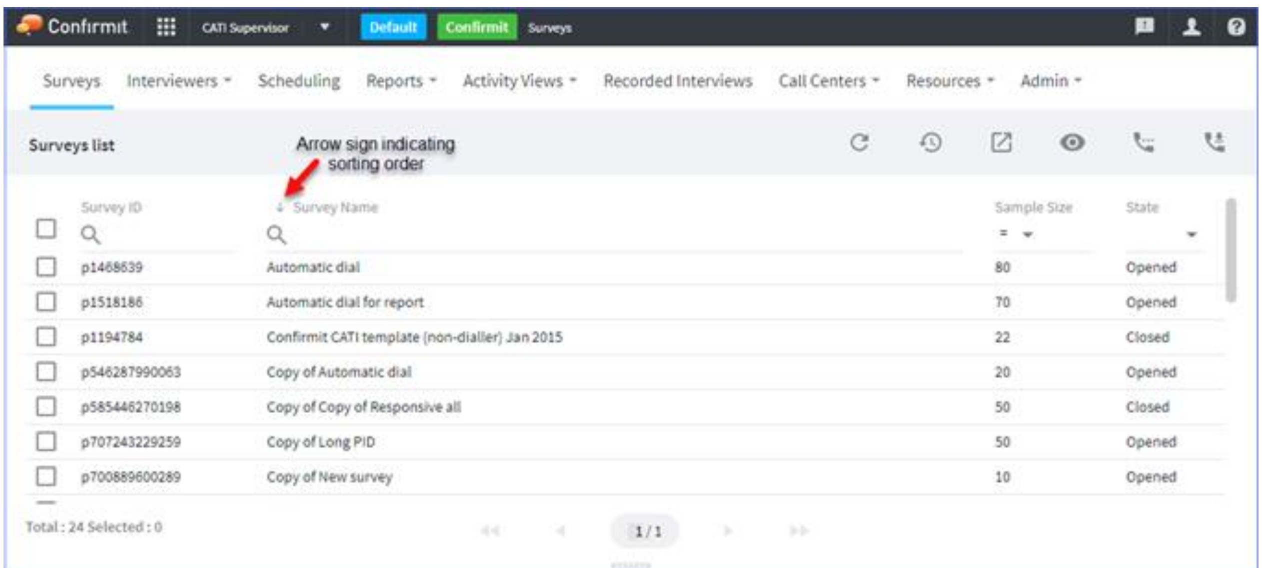


Figure 9 Survey list sorted by survey name in the ascending order

1.5.5. Searching for Records in the List

You can search the record list for particular records. To do this you apply a 'Quick filter' to one or a number of grid columns such that only object(s) that match the filter criteria are listed; records not matching the criteria will be hidden. This search functionality is available in any grid used 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 a number of Quick filters simultaneously - see below.

The grid header row contains (from left to right, indicated by red arrows):

- 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.

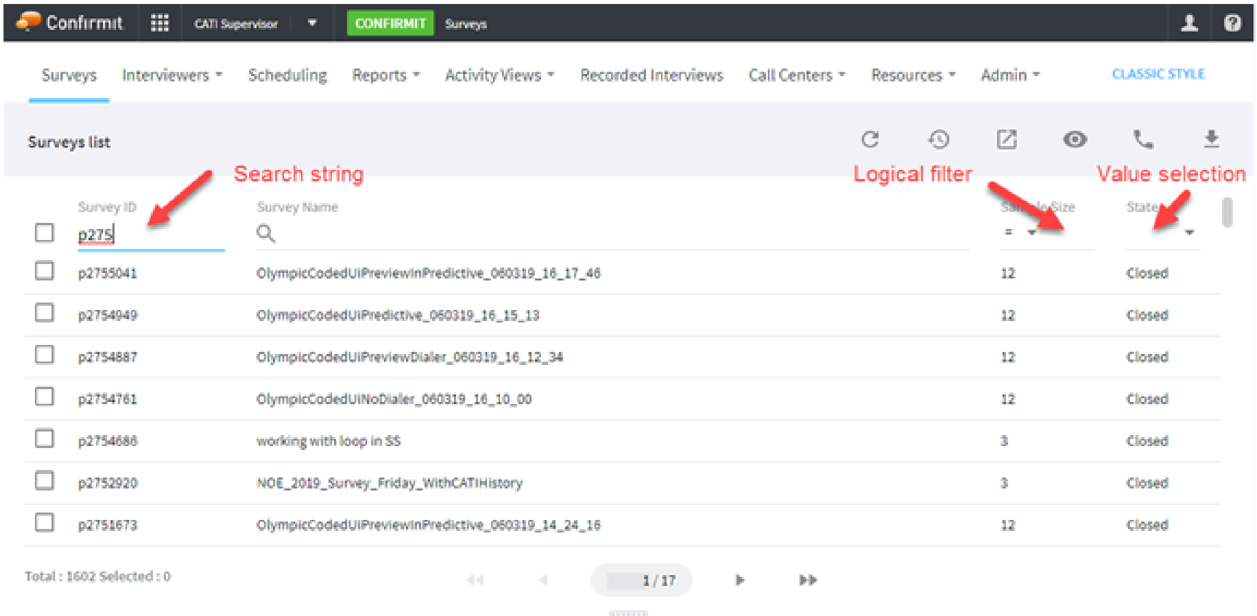


Figure 10 The search facility in the grid header row

- A search string can contain any symbol combination; wildcards are also allowed.
- 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 you can:

- 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.

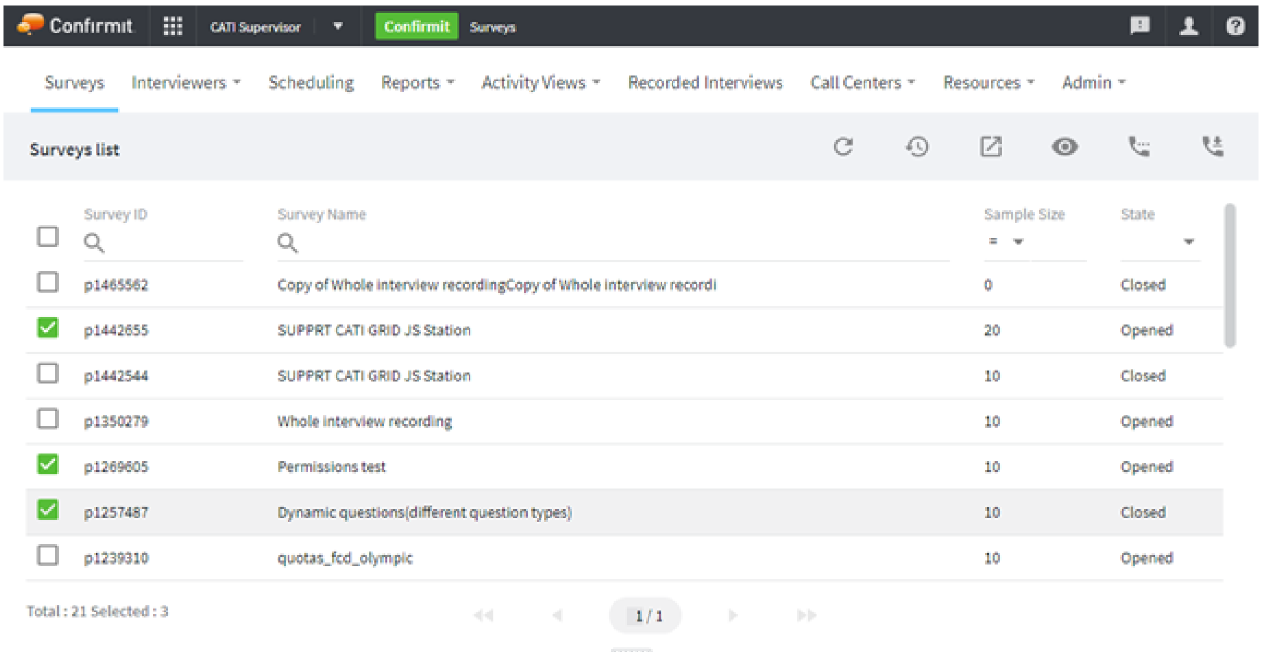


Figure 11 Three objects selected on a grid page

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 submenu 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.

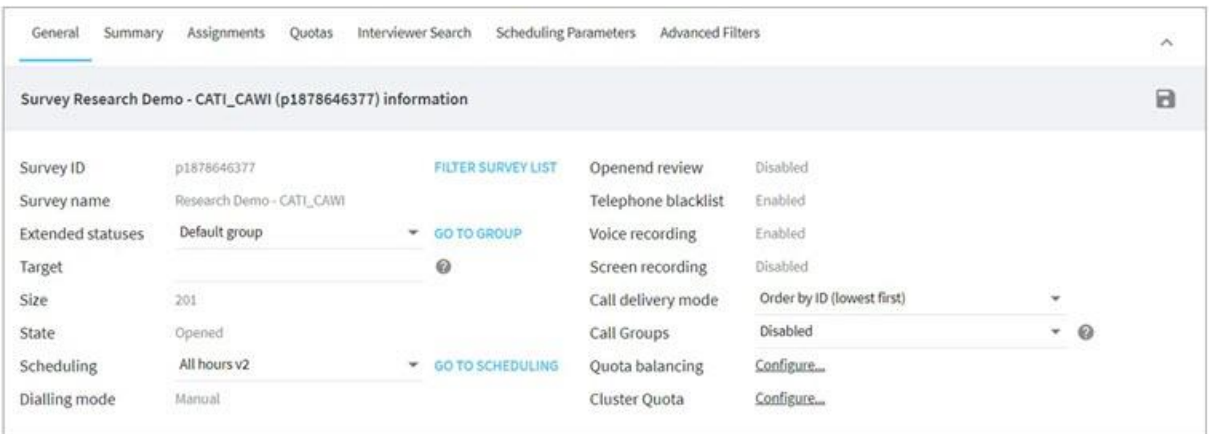


Figure 12 Contents of the bottom right frame - an example

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 Confirmit Horizons toolbar (the header frame). This opens the Provide feedback modal window as shown below.

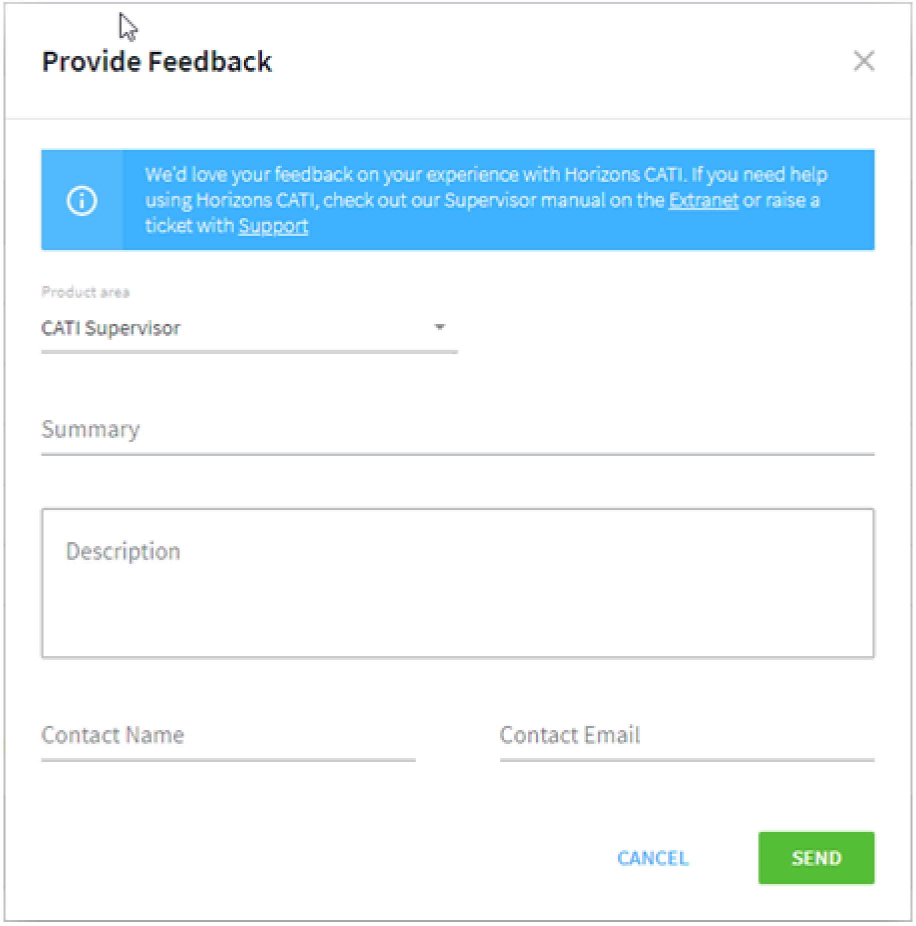


Figure 13 The Provide feedback dialog window

The relevant Confirmit 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.

To facilitate management tasks the CATI Supervisor module allows interviewers to be separated into groups, since particular interviewers may be assigned to particular surveys, or they can be united using other logic.

To perform interviewer management you should choose the Interviewers item in the Navigation menu.

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 (see (go to Adding and Deleting an Interviewer on page 27 for more information) for details).

Refer to Managing Interviewer Groups for instructions on managing interviewer groups, and Managing Interviewers for instructions on managing interviewers.

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. Click on the Interviewers tab in the left Navigation menu. This will unfold the list of interviewers and interviewer groups in the right frame.

   Interviewer groups are presented in the form of the hierarchy tree, where each node stands for an interviewer group. If the interviewer group name has got a plus sign in front of its name, this means that it contains child groups. Click the plus sign to unfold a list of these child interviewer groups.

2. Right-click the required interview group item in the list in the left Navigation frame and choose List groups in the current group from the shortcut menu. This will display the list of interviewer groups. The interviewer group list is displayed in the top right frame of the CATI Supervisor main window.

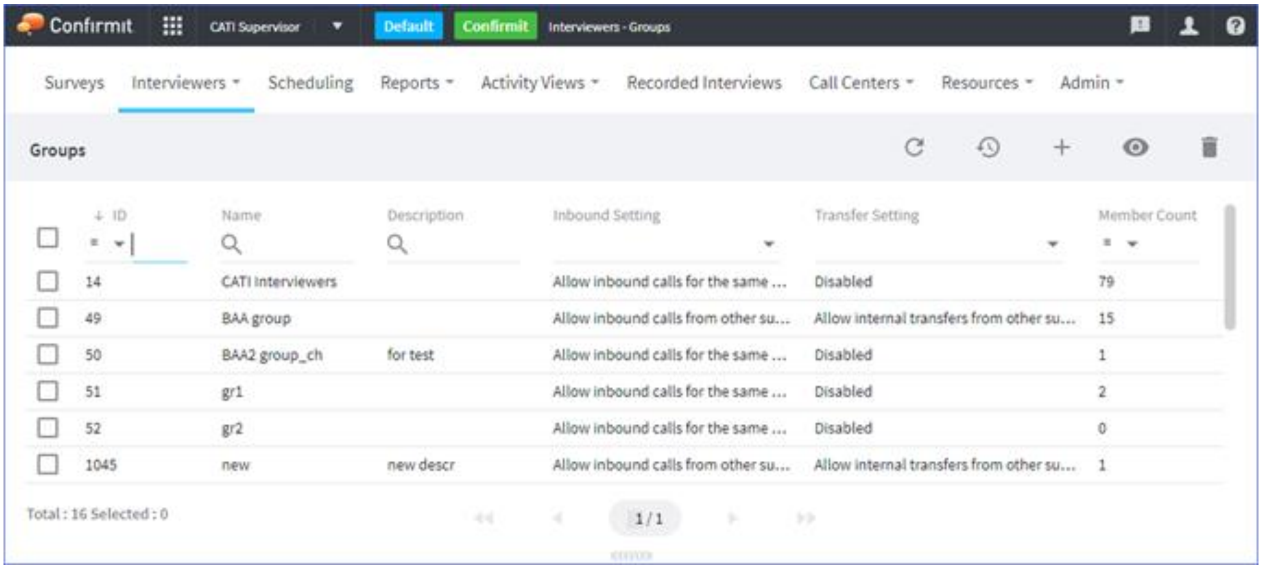


Figure 14 Viewing the interviewer group list in the top right frame

3. 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.

3. 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 interviewer groups displayed in the grid in the top right 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 top right frame.

4. When the top right frame displays the list of interviewer groups its toolbar contains the following object specific button set.

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 window and allows a new interviewer group to be created
	EDIT GROUP	Displays the interviewer group properties in the bottom right 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 (in the top right frame), 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 window opens. Here you specify parameters for the interviewer group being created.

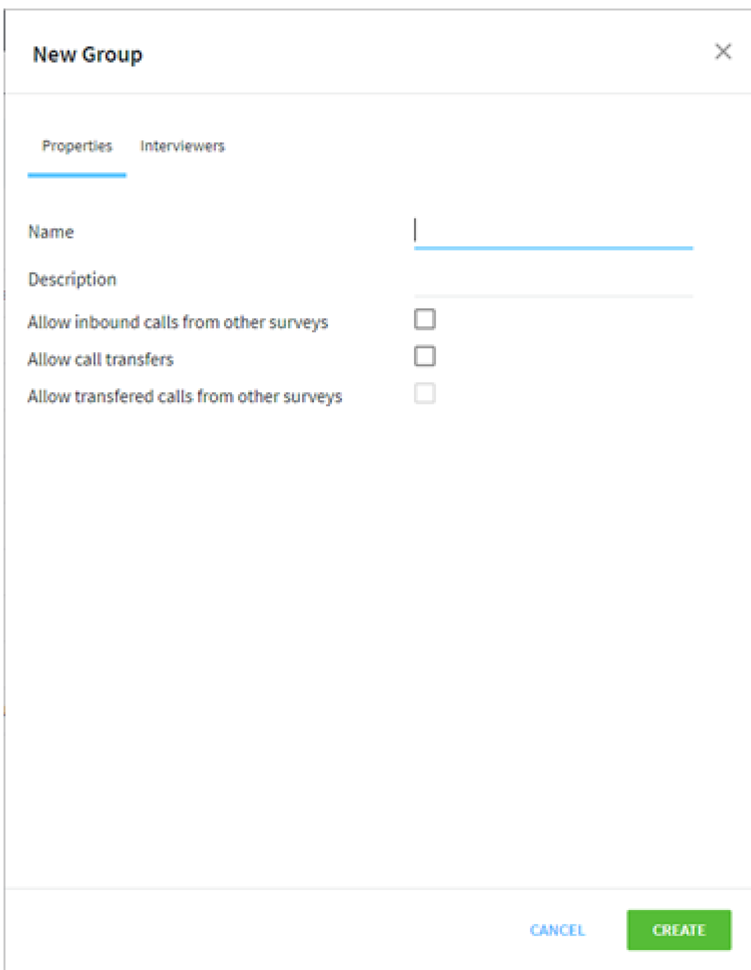


Figure 15 The New Group modal window - the Properties tab

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);
- **Allow call transfers** - this option allows call transfers within a single survey;
- **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.

For more information on inbound call handling and call transfers, refer to (go to Inbound call handling on page 276 for more information) and (go to Performing Call Transfers on page 288 for more information).

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

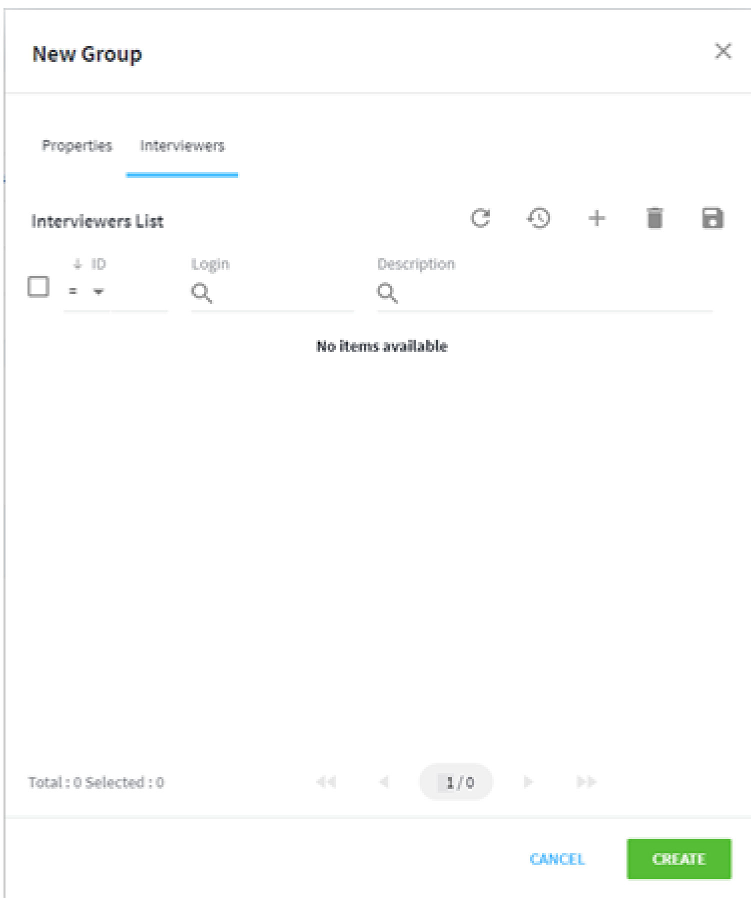


Figure 16 New Group modal window - Interviewers tab

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 on this window toolbar. If you have already added at least one interviewer and its 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.

   This will display the Add Interviewers modal window.

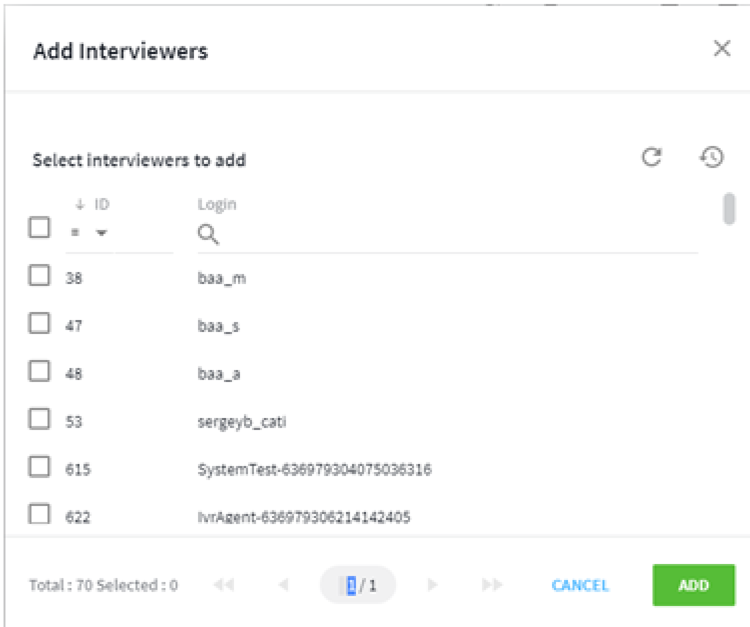


Figure 17 Selecting interviewers to add to the Interviewers tab

   The list displays only interviewers that were already added to the system. You cannot add new interviewers using this window interface – this should be done only with the help of the New Interviewer dialog window (see Adding and Deleting an Interviewer for instructions).

   Select the required interviewers by checking boxes in front of the interviewer 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 interviewer 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 interviewers. This window will close and the selected interviewers will be displayed in the grid in the Interviewers tab in the New Group window.

   Added interviewers can be deleted from the list in the Interviewers tab – 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.

5. Finally click **OK** to create a group with the specified properties. The New Group modal window closes and the group name appears in the list in the top right frame of the main module window.

To delete an interviewer group:

1. Select a single or a number of interviewer groups by checking a box in front of the required groups in the list (or click the required items while holding down Ctrl or Shift keys on the keyboard to create a multiple selection). You can use the Clear Selection button to simultaneously deselect all the selected items.
2. To delete existing interviewer group(s) 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. The CATI Supervisor module will ask you to confirm the action by displaying the confirmation dialog box. Click Yes to proceed with deletion.
4. Note that when you try to delete a group that was previously used to create a multiple assignment, the whole multiple assignment is deleted, too. In such case the CATI Supervisor will warn you by displaying a message. For information regarding multiple assignments see (go to Multiple Group Assignments on page 154 for more information).

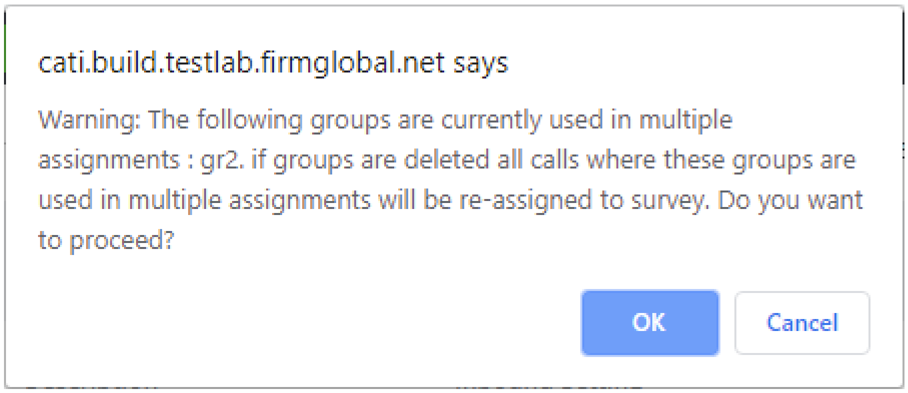


Figure 18 Message displayed when a group used in a multiple assignment is deleted

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

5. Pressing **OK** in the dialog shown in the picture above will delete the group and simultaneously delete the multiple group assignment. Pressing **Cancel** will simply close the dialog - no action will be taken.

2.1.3. Viewing and Modifying the Interviewer Group Properties

You can always modify properties you have specified when creating the group.

To modify the interviewer group properties:

1. To modify the group properties either:

- Right-click the required row in the list (in the top right frame), and choose Edit Group from the context menu, or;
- Click the Edit Group button in the toolbar in the top right frame.

2. Any of the above listed actions displays the interviewer group properties in the bottom right frame. This frame uses tabs to display the group properties. Use these tabs to modify parameters of the existing interviewer group.

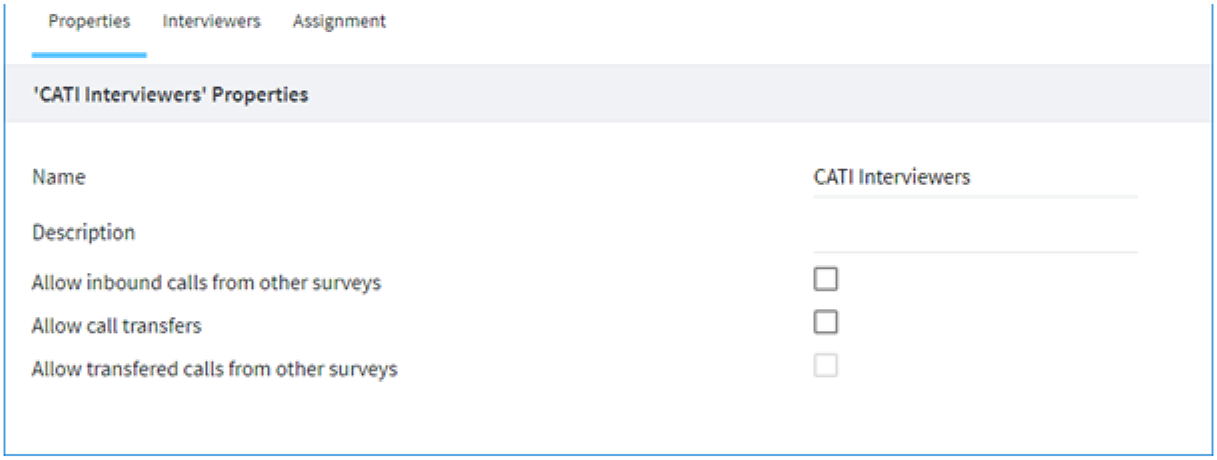


Figure 19 Interviewer group properties, Properties tab - the right bottom frame

3. All tabs except for the Assignment tab have controls that are similar to those used with the New Group dialog window (go to Adding and Deleting an Interviewer Group on page 14 for more information). The same work technique is applied with these tabs.

   Pictures below show these tabs.

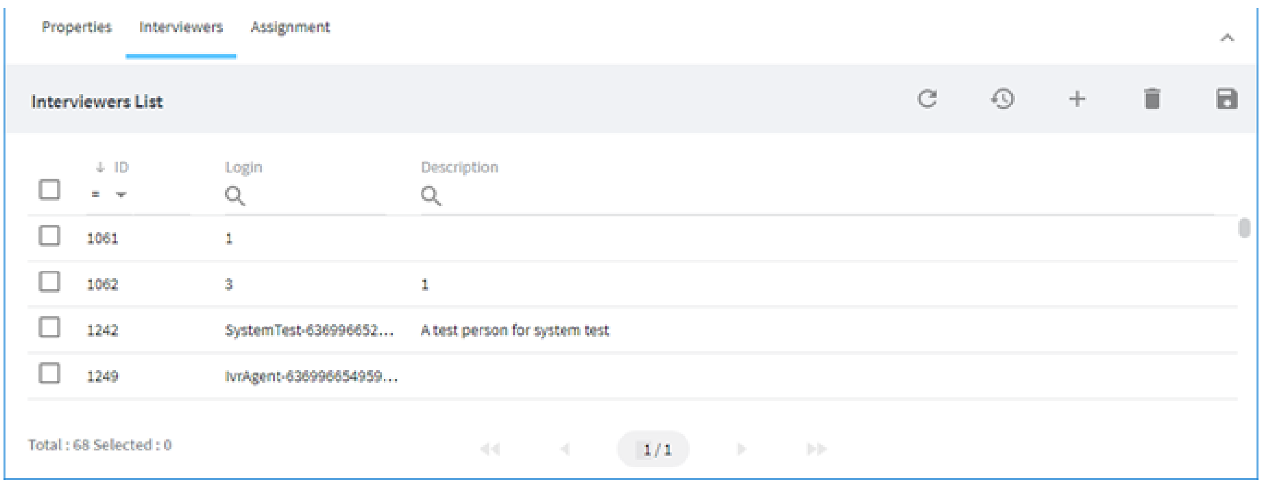


Figure 20 Interviewer group properties, Interviewers tab - the right bottom frame

Note that tabs in the Interviewer Group Properties view contain the Save button  on the toolbar. If you have made changes to any of the properties described herein, the Save button starts flashing prompting you to save the changes. Always save the changes you make on any of these tabs before you close the Interviewer Group Properties view - otherwise these changes will be lost. CATI Supervisor prompts you by displaying the warning message if you try leaving the page containing unsaved changes.

4. The Assignment tab allows you to 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 you should view this interviewer's properties (see (go to Viewing and Modifying the Interviewer Properties on page 39 for more information) for instructions). To view assignments made for a nested interviewer group you should view this group's properties.

Figure 21 Interviewer group properties, Assignment tab - the bottom frame

The list in this tab shows the following information for each assigned survey – the assigned project ID, its name, and the number of calls assigned for the group.

You can assign new surveys to the group by pressing the New button + on the toolbar, or by right-clicking any row and choosing New from the shortcut menu.

This action displays the Select surveys to assign dialog window.

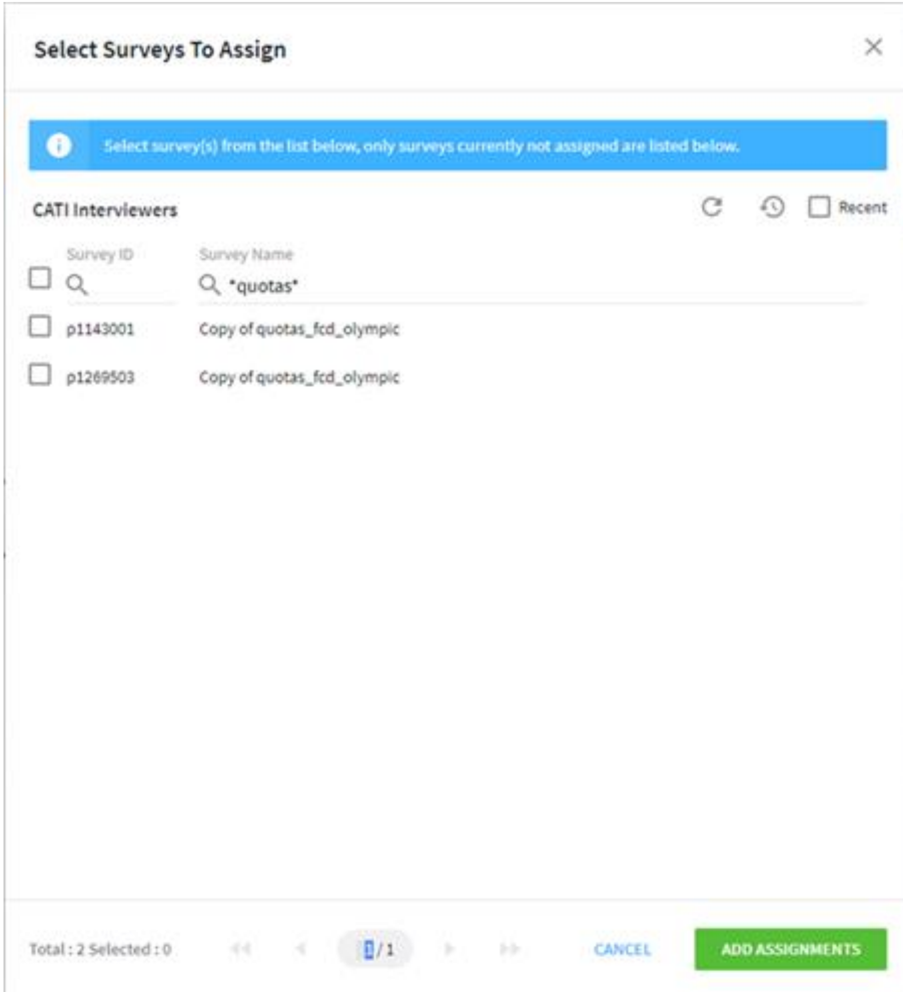


Figure 22 Selecting a survey to assign using the Select surveys to assign dialog window

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 .

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. Refer to (go to Recent Surveys on page 128 for more information) for details regarding this option.

Choose a Dial Type from the drop-down box. This option allows for dialing numbers while observing TCPA compliance requirements. Refer to (go to Dialing in the Single Survey TCPA Mode on page 367 for more information) for information regarding the TCPA compliance mode.

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.

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

   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 window.

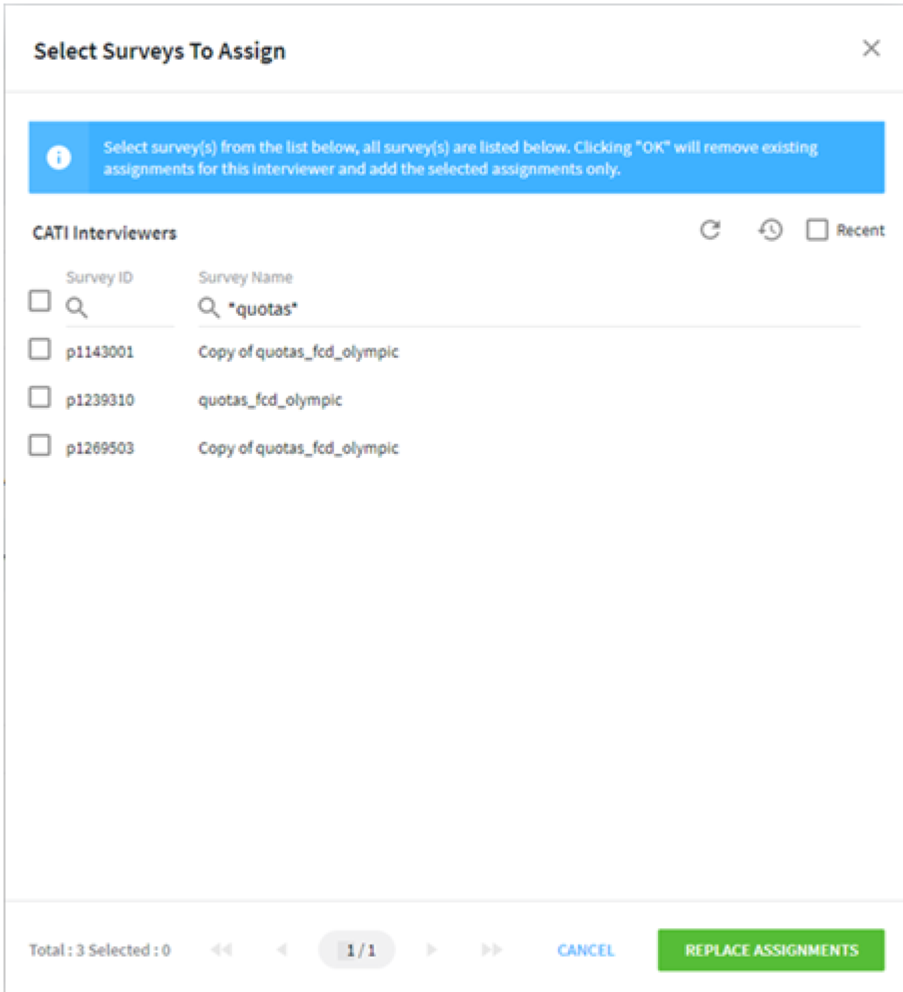


Figure 23 Selecting surveys to replace the existing assignment for an interviewer group

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.

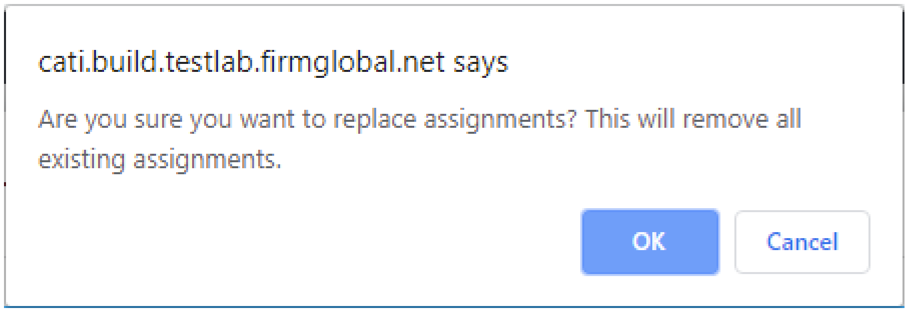
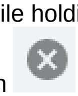


Figure 24 Warning message displayed on the attempt to execute the assignment replacement

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

6. Added surveys can be de-assigned (removed from the list) in the Assignments tab – select the required surveys by checking boxes in front of their names in the list (or click the required items while holding down Ctrl or Shift keys on the keyboard to create a multiple selection) and 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.

   The CATI Supervisor will display the dialog box asking you to confirm the action. Click Yes to proceed with the De-assign action. The bottom right frame will be refreshed and the chosen surveys will disappear 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 you select in the interviewer group list displayed in the top right frame.

Both actions can be performed for one interviewer group at a time, not for a multiple selection.

Adding and replacing assignments in that case is performed with the help of the dedicated dialog windows 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 group, and replaces them by 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 (see (go to Viewing the Interviewer Group List on page 12 for more information) for instructions).
2. Right-click the required interviewer group in the list (multiple selection is not supported), and choose "Add assignment" from the context menu that appears. This will display the "Add Assignment" dialog window.

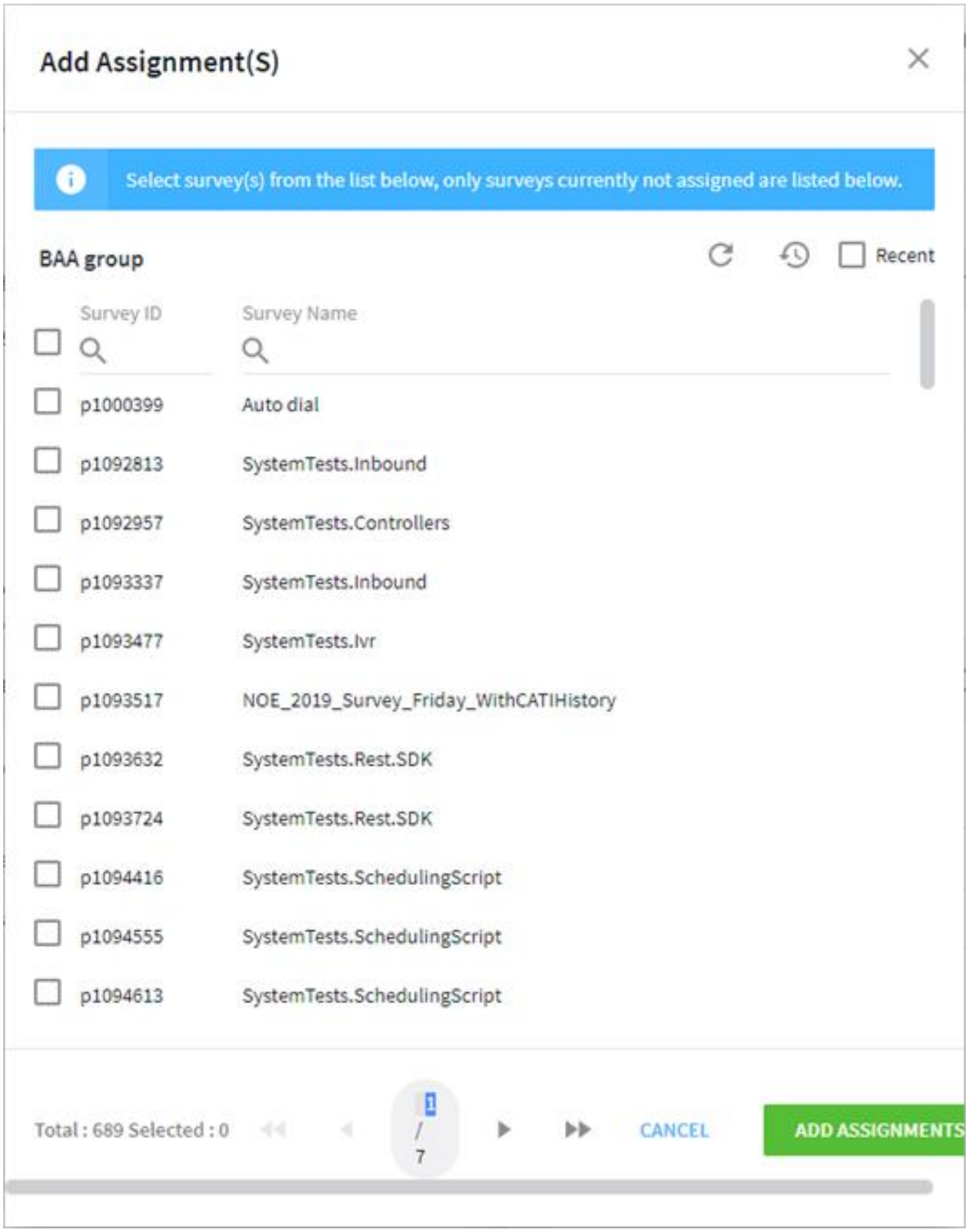


Figure 25 Selecting a survey to assign in the Add Assignment window

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

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

3. Click OK to confirm the selection. The Add Assignment dialog window will close, and the selected survey(s) will be 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 required list of interviewer groups in the top right frame (see (go to Viewing the Interviewer Group List on page 12 for more information) for instructions).

2. Right-click the required interviewer group in the list (multiple selection is not supported), and choose "Replace assignment" from the context menu that appears. This will display the "Replace Assignment" dialog window.

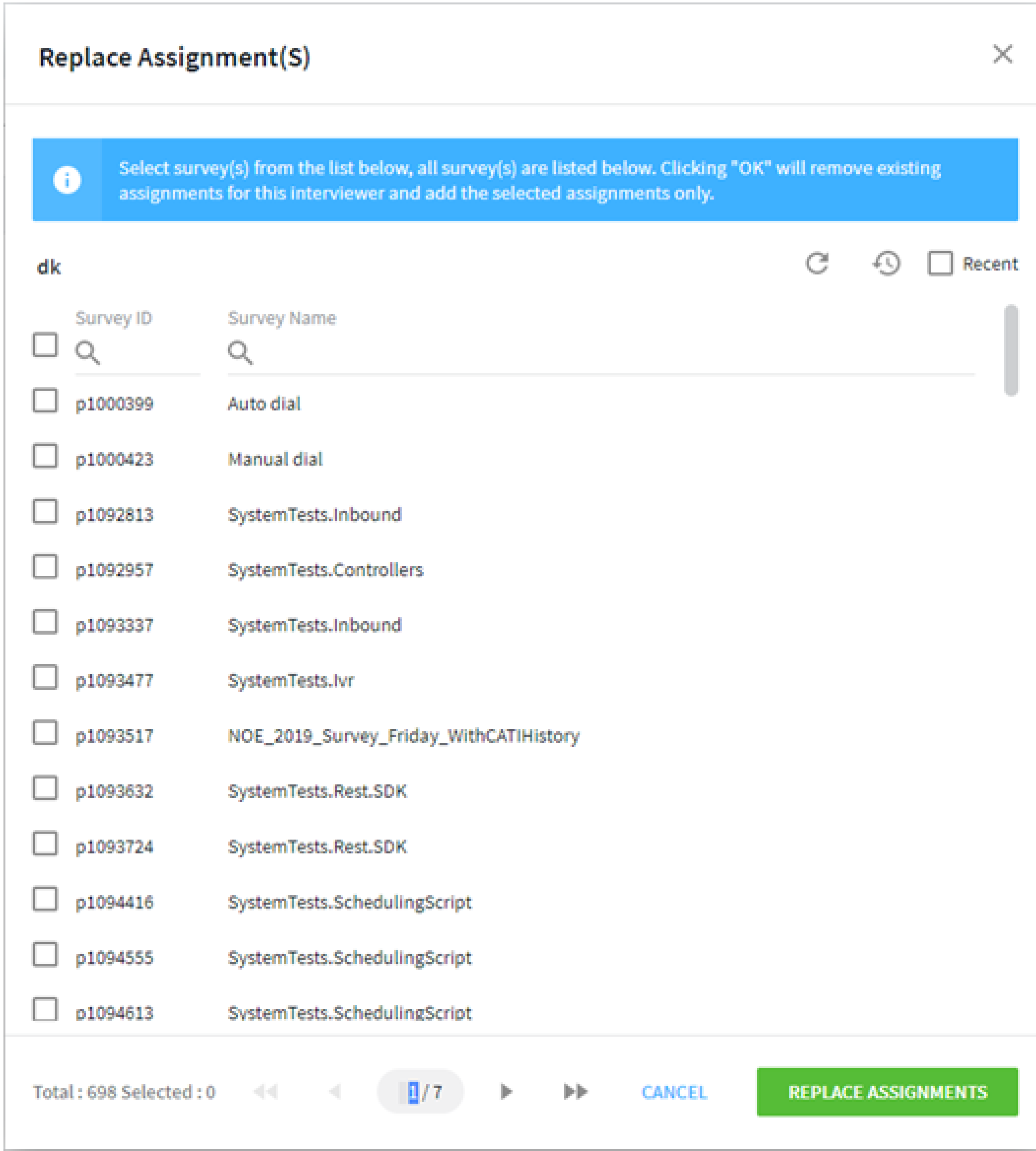


Figure 26 Selecting a survey to replace assignment in the Replace Assignment window

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

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

3. Click Replace assignments to confirm the selection. The Replace Assignment dialog window will close, and the selected survey(s) will replace the list of existing assignments for the current interviewer group.

2.1.5. Changing the Task Choice Mode for the Interviewer Group

You can simultaneously change the task choice mode for all interviewers belonging to one or a number of selected groups. This action will set the same task choice 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 task choice mode for a single interviewer.

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

1. In the grid containing the interviewer group list (in the top right frame) 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 Change Task Choice dialog opens. This dialog and the rest of the procedure is similar to that used to configure the task choice mode for a single interviewer (go to Changing the Task Choice Mode for an Interviewer on page 62 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.
- Add and delete interviewers/IVR agents.
- View and modify interviewer/IVR agent properties.

2.2.1. Viewing the Interviewer List

You can use the Interviewers tab to browse the interviewer/IVR agent list. Please keep in mind that you can browse a list and perform operations either with the "human" interviewers or with the virtual IVR agents - 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" who “conduct” interviews (in fact IVR agents are only used to register interviews that are managed by the CATI system). IVR is a technology that allows for automatic conduct of interviews 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 the DTMF 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. Click on the Interviewers object name in the left Navigation menu. This will open the list of interviewer group items below.

   Interviewer group items are presented in the form of the hierarchy tree where nodes stand for interviewer groups. If the interviewer group name shows the plus sign in front of its name, this means that it contains child groups. Click the plus sign to open the list of these child interviewer groups.

2. Double-click the required interview group item in the list in the left Navigation frame, or right-click its name and choose **List interviewers in current group** from the shortcut menu. This will display the list of interviewers. The interviewer list is displayed in the top right frame of the CATI Supervisor main window.

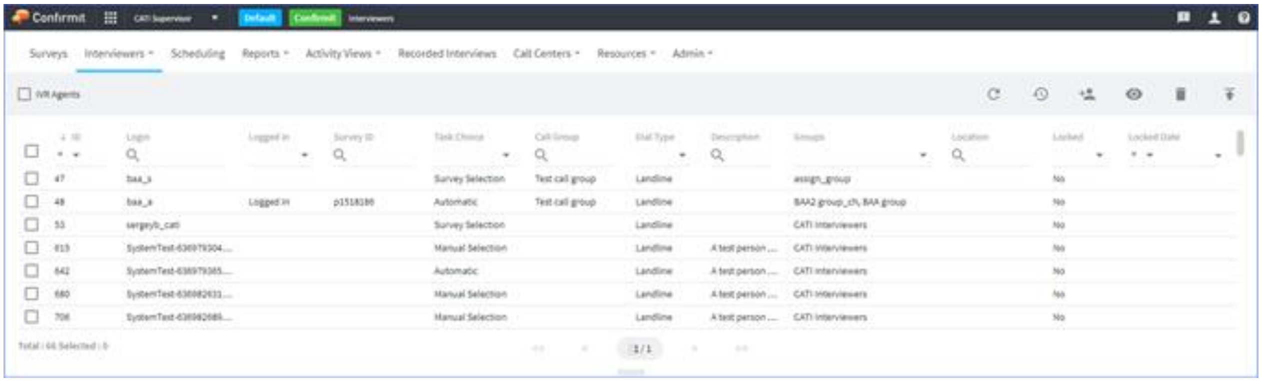


Figure 27 Viewing the interviewer list in the top right frame

3. If you need to work with the IVR agents check the IVR Agents box. This will reveal virtual IVR agents and hide human agents. All operations that you perform with this option turned on are performed only on IVR agents - regular human interviewers cannot be managed in this case. To switch back to regular human interviewers, clear the IVR Agents box.

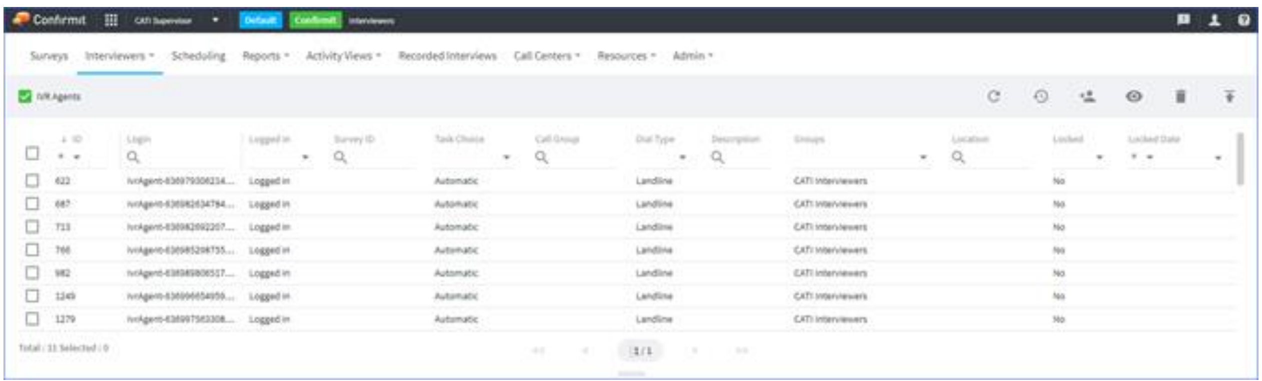


Figure 28 Viewing the list of IVR agents

4. 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 top right 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 window 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 (see Viewing the Interviewer List for instructions).
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.

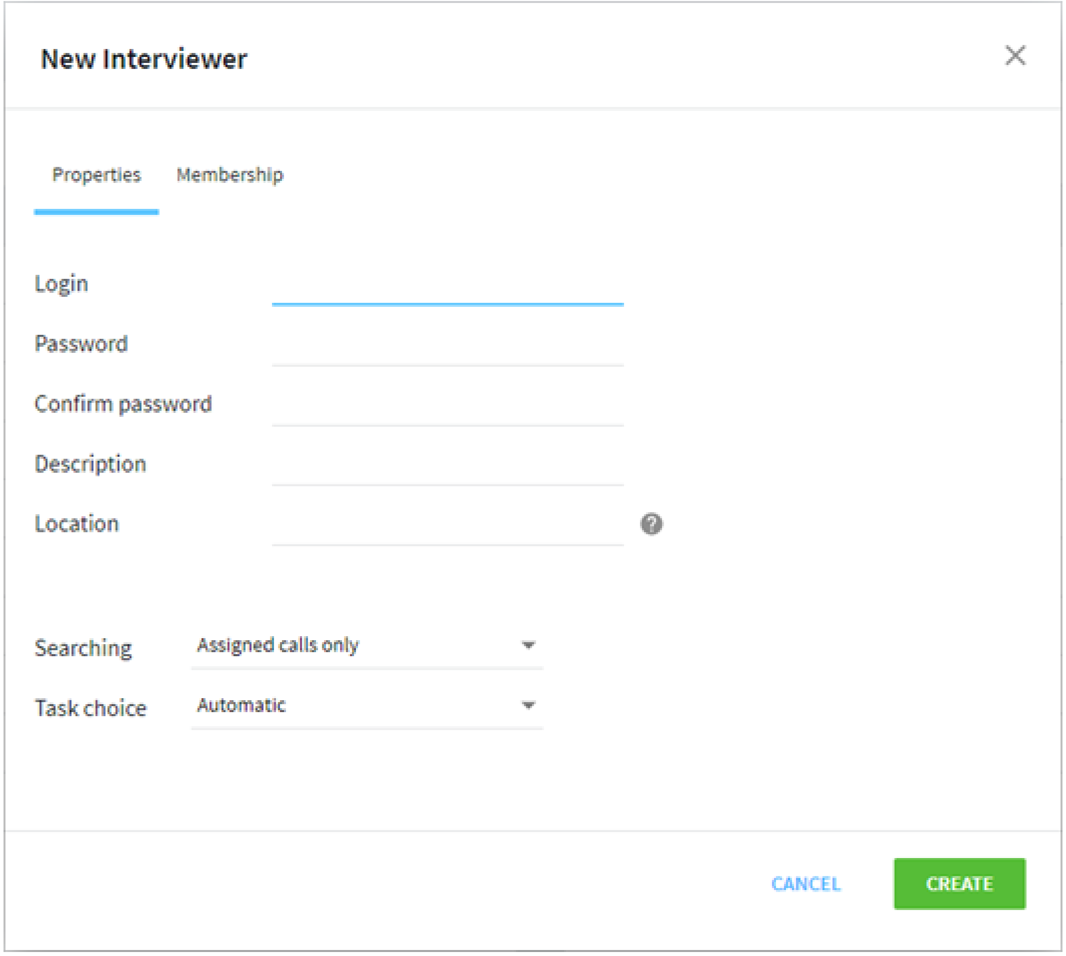


Figure 29 New Interviewer dialog window - Properties tab

4. 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.
5. 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!

   See (go to Changing a Location for an Interviewer on page 66 for more information) also for alternative ways of changing the Location attribute value.
6. An interviewer can be allowed to bypass explicit call assignment. So 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 task choice mode, (and also if the Manual task choice mode is selected under the Choice task choice mode, see (go to The Task Choice mode for an interviewer on page 29 for more information) for description of task choice modes).

   In case the interviewer works in a task choice 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.

   Two options are available - "Assigned calls only", and "All calls".

"Assigned calls only" is a default value. This option specifies that the interviewer will work in a regular way - they will see only calls that were explicitly assigned to them. Calls that were not assigned explicitly to that interviewer would remain invisible to them.

The "All calls" option makes all calls assigned to all interviewers available to that particular interviewer regardless of what calls he is explicitly assigned to.

7. The Call Groups option allows applying custom call delivery rules by choosing from a number of preconfigured call sets - for full description of the option and configuration procedure refer to (go to Configuring the Call Groups on page 349 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 (see (go to Changing a Call Group for an Interviewer on page 67 for more information)for instructions).

   Note that the Call Group option can be applied to the interviewers who are assigned for working in the Survey Selection task choice 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 367 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 Task Choice mode for an interviewer

Manual: Upon logging in the interviewer will reach a landing screen where they may select both a survey and a call to work with, after each interview is finished the interviewer will be returned to the landing screen where they may choose another survey or call.

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

Survey Selection: Upon logging in the interviewer will reach a landing screen where they can choose a survey to work with. Once a survey has been selected the system will begin to deliver calls automatically for the chosen survey. The interviewer will only be delivered calls for their chosen survey even though they may be several others. Call delivery for the chosen survey will continue until the interviewer logs out.

Choice: Means that upon logging in the interviewer will have to choose the task choice mode. The choice is performed using the dialog window which appears right after they log in. This dialog window contains a drop-down box with a list of task choice modes assigned to them by the supervisor.

In case the supervisor assigns the **Choice** option, all three mode types, which are described above, appear below the field followed by checkboxes. Task choice modes with the tick inside the box will be available for the interviewer when they log in to the CATI Interviewer Console.

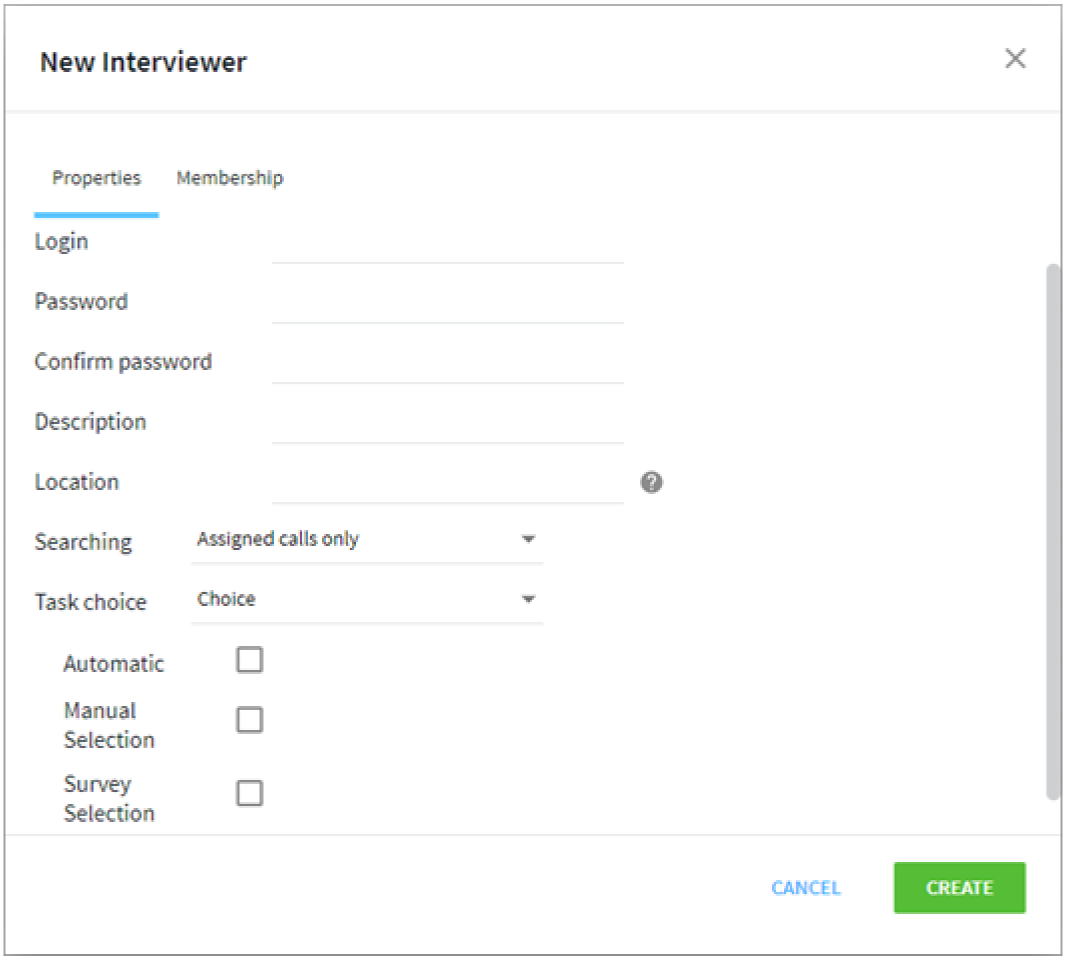


Figure 30 Selecting the "Choice" mode

The Membership tab also allows you to choose a group to include the interviewer into.

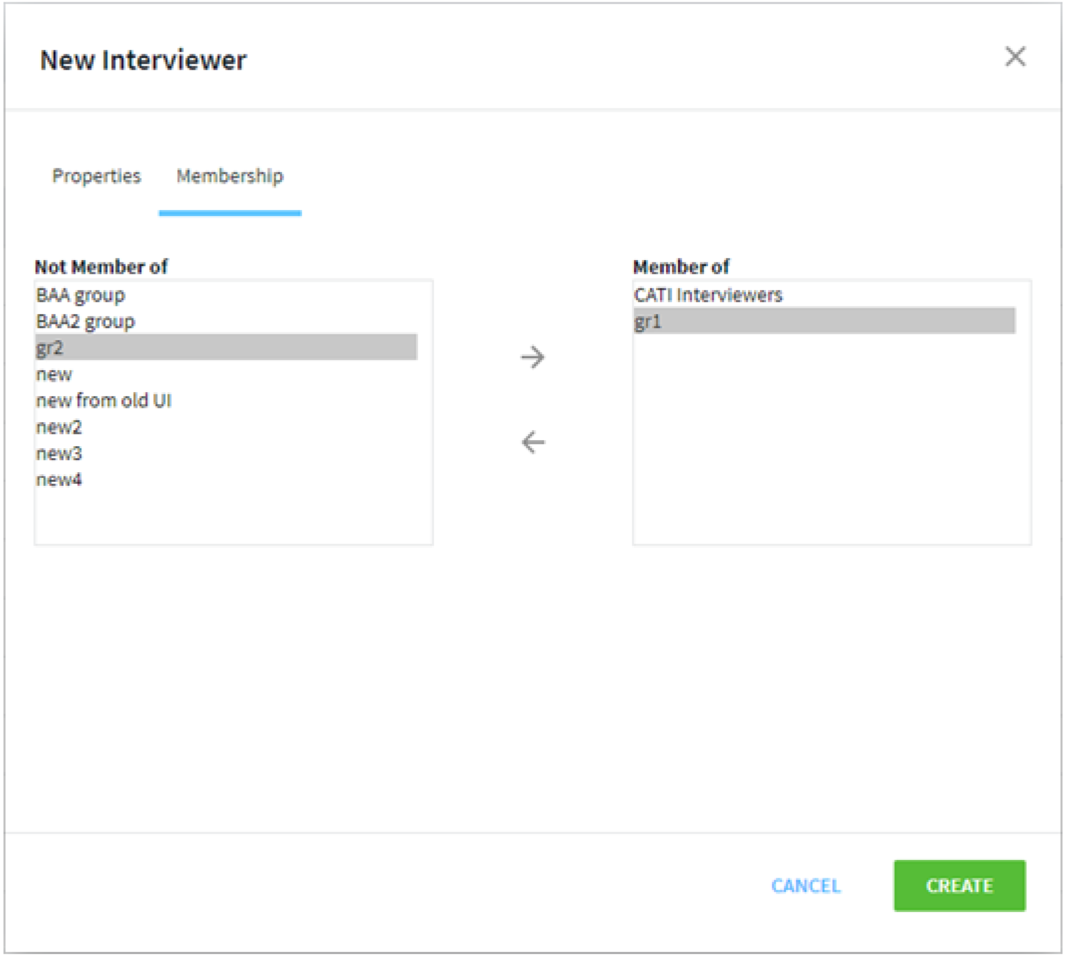


Figure 31 New Interviewer dialog window - Membership tab

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

You can choose any number of groups to include this interviewer in (from the list of existing groups 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 make the current interviewer the member of the selected group. The selected group name appears in the right pane (Member of).

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

Repeat the procedure to add the interviewer to other required groups.

12. Finally click OK to create an interviewer with the specified properties. The New Interviewer dialog window 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 into.

To delete an interviewer:

1. Select one or a number of interviewers by checking the box in front of the required interviewers in the list in the top right frame (or click 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 all the selected items.

2. 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 frame.
3. Click **OK** to proceed with deletion.

2.2.3. Adding and Deleting IVR Agents

1. To create new IVR agents either right-click any row in the interviewer list (in the top right frame), 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 IVR agents being created.

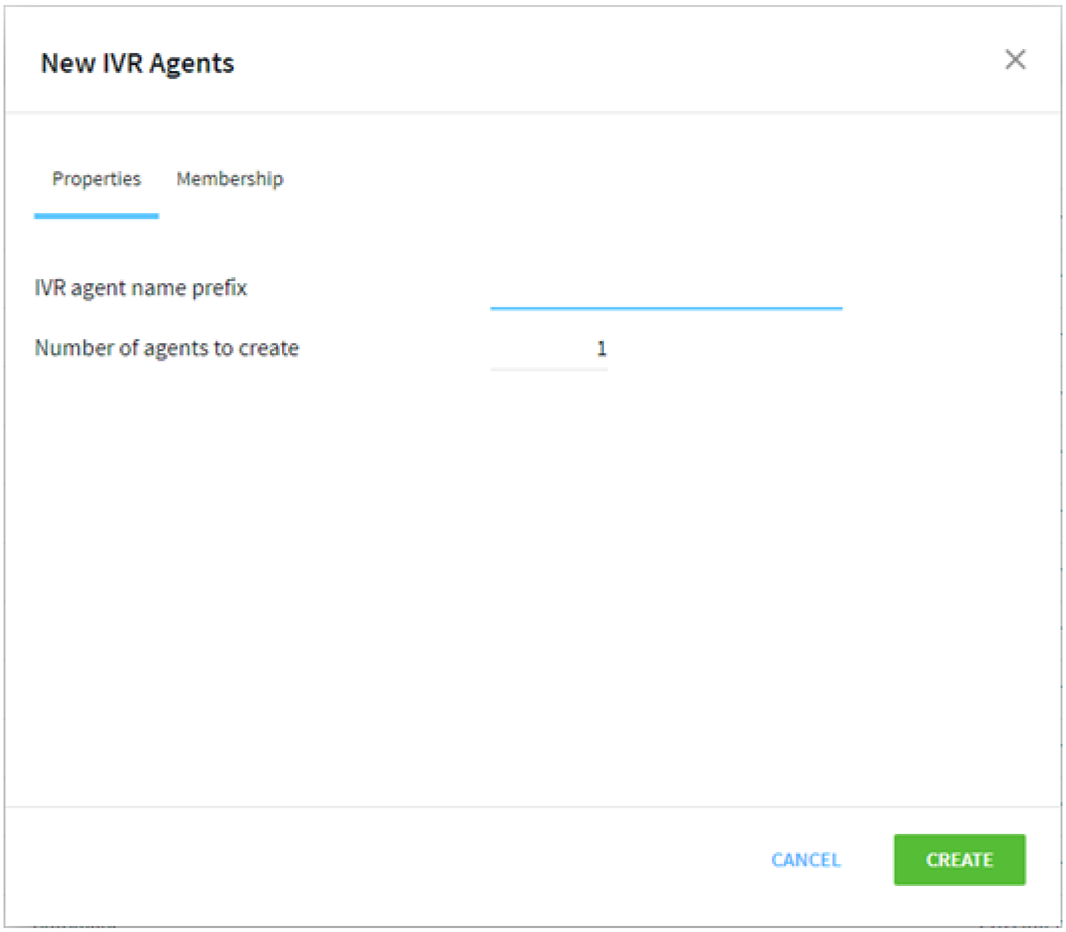


Figure 32 New IVR agents modal window - Properties tab

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 Confirmit. 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.

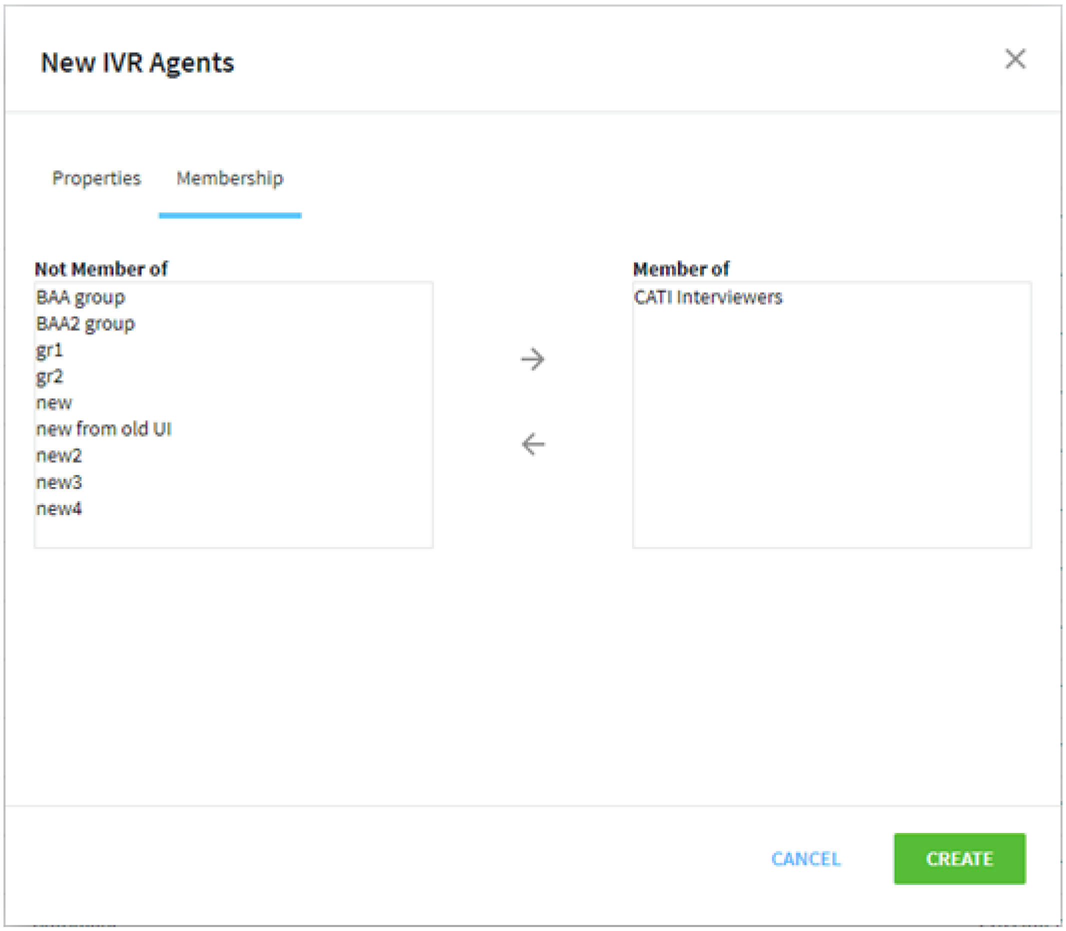


Figure 33 New IVR agent modal window - Membership tab

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** arrow button located between panes to make the current interviewer the member of the selected group.

   The selected group name appears in the right pane (Member of).

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

   Repeat the procedure to add the interviewer to other required groups.

4. 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. The supervisor does not have to perform any steps to initiate an IVR agent's login procedure. The CATI system periodically checks if there are any IVR agents which are not logged in, and if it founds any it starts a login procedure 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 proceed with 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 finished 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. This means that the interviewer whose account has been locked would not be able to log into the system when he/she starts 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.

The supervisor can also lock the account of any interviewer who is currently logged in and even conducts an interview. In such case the interviewer is logged out immediately, and Interviewer Console displays the appropriate warning message. This interviewer would not 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. Manual account locking command DOES NOT enable automatic interviewer account locking - it simply locks the interviewer account straight away, without any conditions. Refer to (go to Configuring Settings Related to the Entire Company on page 461 for more information) for description of the procedure used to configure the automatic interviewer account locking.

To allow the interviewer whose account has been locked to work with the system again, the supervisor should 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.

Unlocked interviewer is immediately allowed to log into the system.

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

Be aware that if an interviewer is locked while an interview was 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 in the top right frame (see (go to Viewing the Interviewer List on page 25 for more information) for instructions).
2. Right-click the required interviewer's name (or select a number of interviewers and right-click the selection) in the list and choose Lock from the context menu that appears.

   CATI Supervisor will display the prompt asking you to confirm the action.

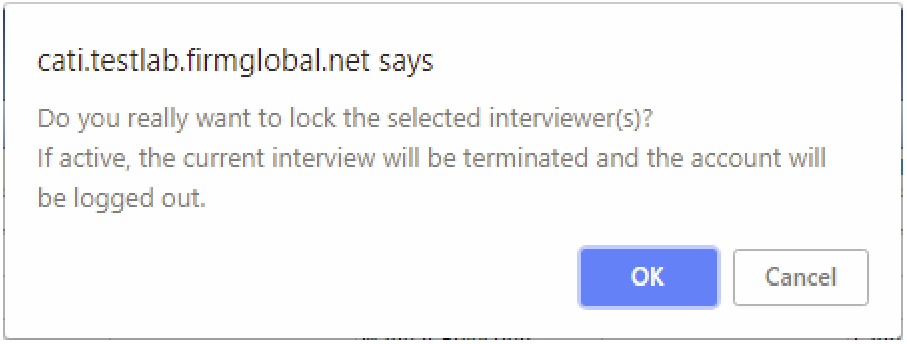


Figure 34 Confirming instant interviewer account locking

3. Click OK to lock the selected interviewer(s). The Interviewer list is then refreshed, and locked interviewer accounts are grayed out and marked appropriately - the Locked column shows "Yes", and the Locked Date column displays time and date when the account was locked (see the picture below).

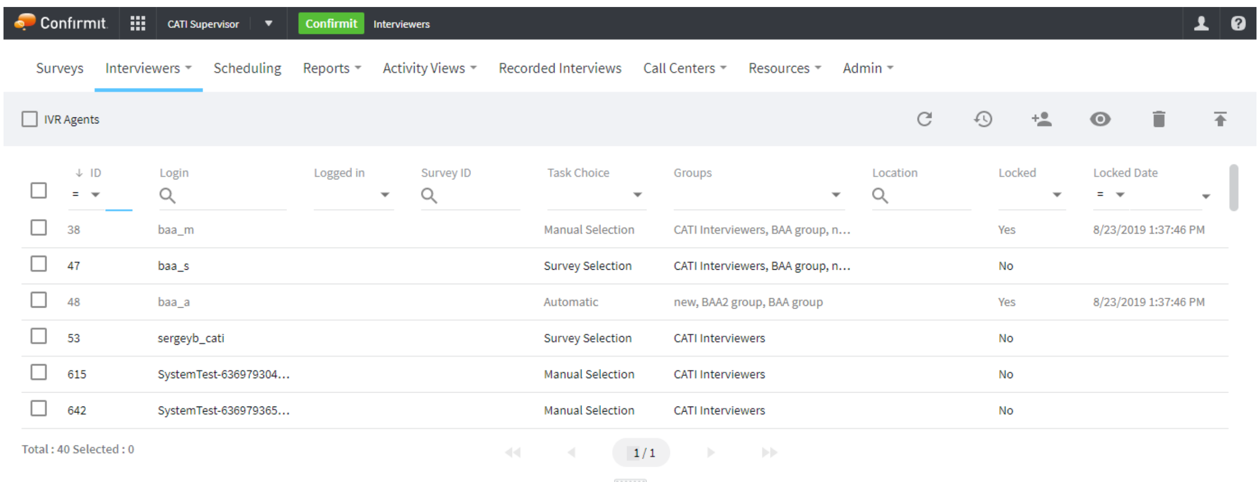


Figure 35 Interviewer list showing locked interviewer accounts

To unlock an interviewer's account:

1. Display the Interviewer list in the top right frame (see (go to Viewing the Interviewer List on page 25 for more information) for instructions).
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 that appears.

   CATI Supervisor will display the prompt asking you to confirm the action.

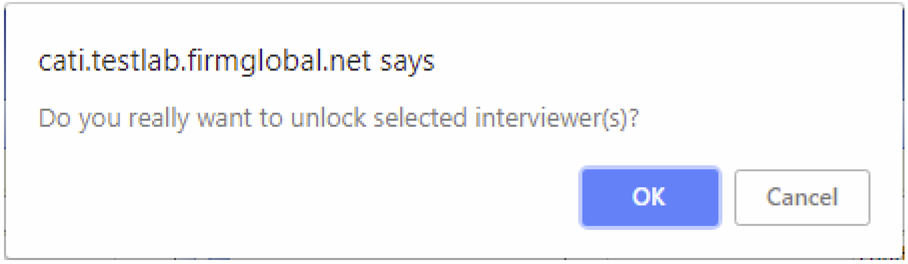


Figure 36 Confirming interviewer account unlocking

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:

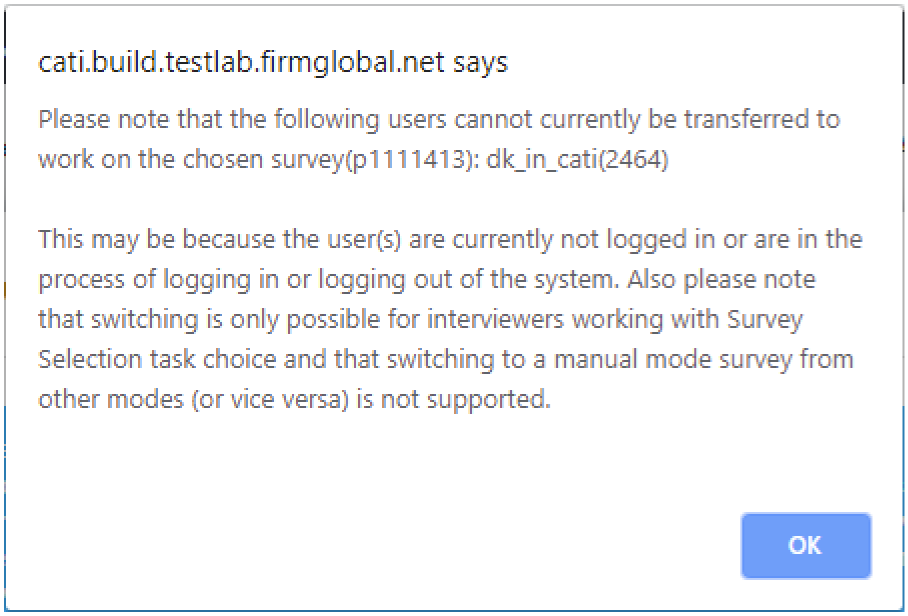


Figure 37 Example of the warning message

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.

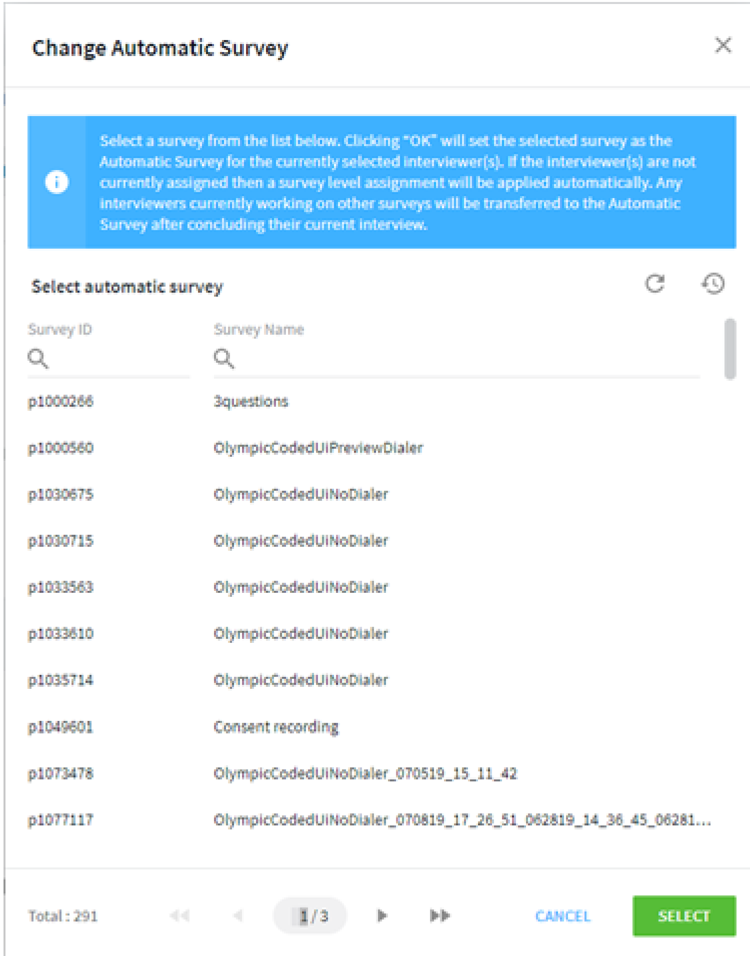


Figure 38 Seamless change of an automatic survey

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 window is assigned to him and the corresponding interview is delivered.

A message informs the interviewer of the change.

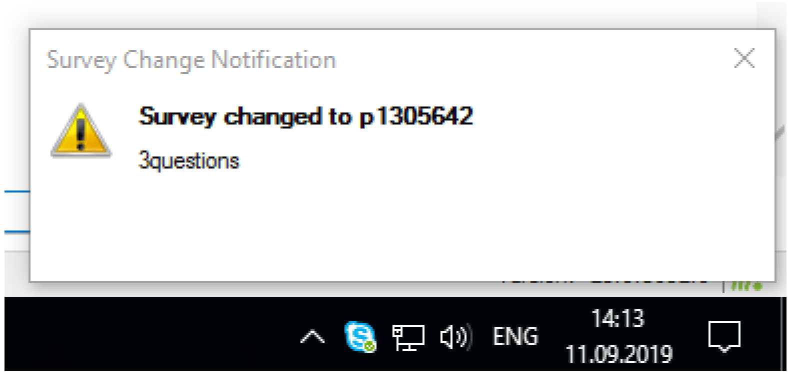


Figure 39 Information message displayed upon the seamless change of an Automatic Survey

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 (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 interviewer properties are displayed in the bottom right 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 window (go to Adding and Deleting an Interviewer on page 27 for more information). The same work technique is applied with these tabs.

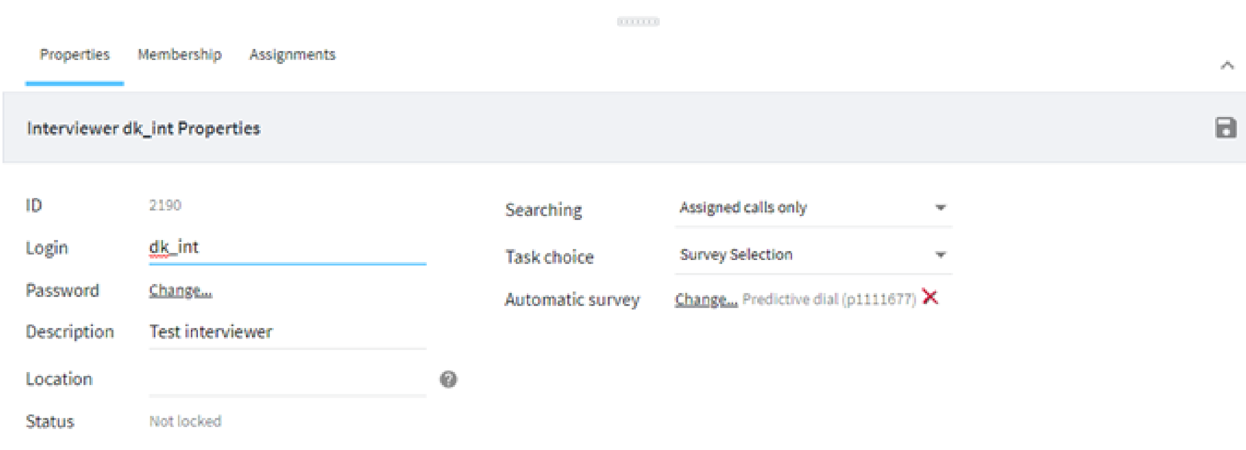


Figure 40 Interviewer properties on the Properties tab

- 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.
- Current interviewer's password is never displayed. Click the **Change** button to change the current interviewer's password. This will display a form 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 34 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 66 for more information).
- The **Searching** option affects interviewers working in the Manual task choice 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 only see calls that are assigned to him, or to the group he currently belongs to. When the All calls option is enabled, the interviewer would also be able to 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 349 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 task choice mode (see task choice 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 any task choice mode other than Survey Selection, a warning is displayed beside the Call Group drop-down list as shown below. Hover the mouse pointer over the Warning to open the tooltip describing the cause of the error.

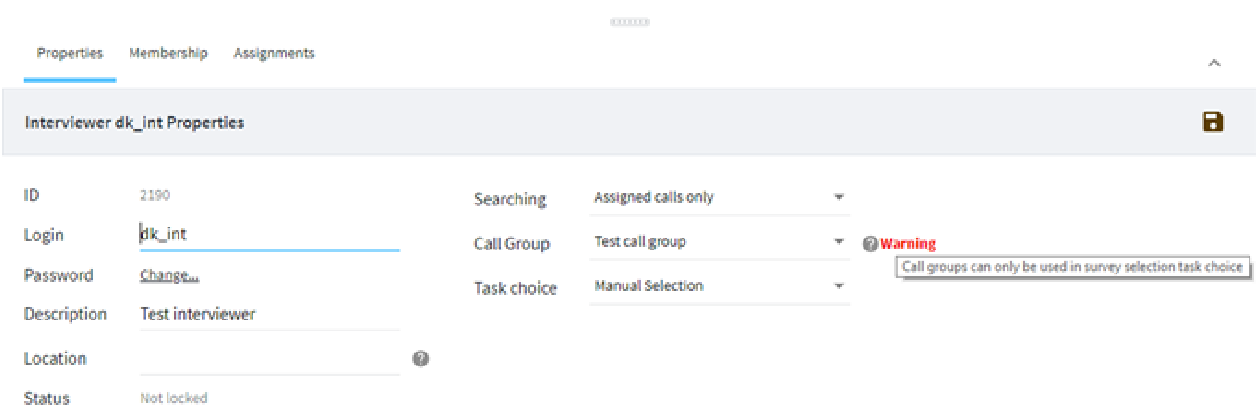


Figure 41 The Warning sign displayed when a call group is apllied to an interviewer not assigned for work in the Survey Selection task choice mode

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 263 for more information).

Automatic and Manual selection task choice 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 task choice 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 (go to Selecting a Survey/Interview on page 263 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.

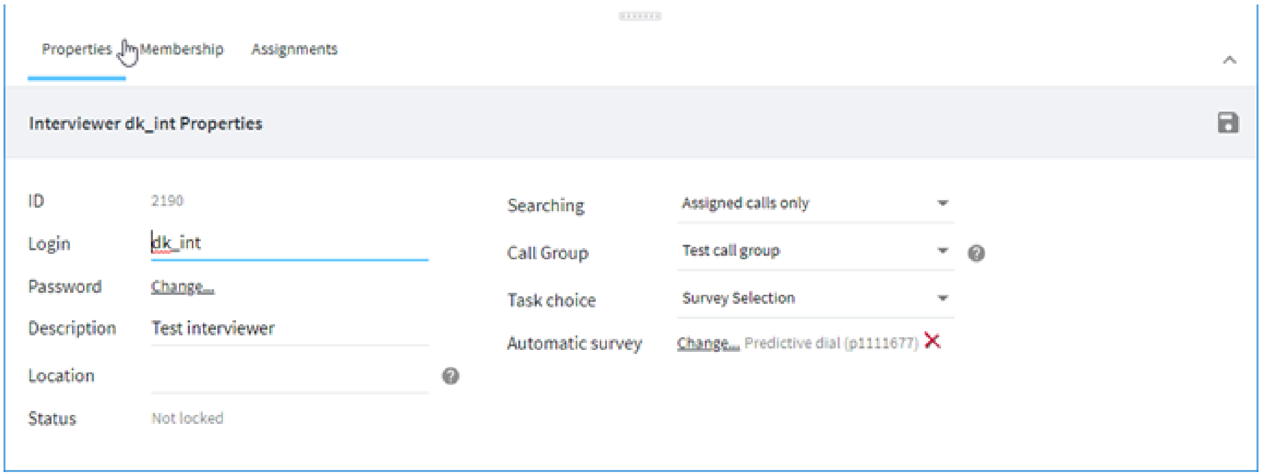


Figure 42 Interviewer properties, the Properties tab - the Survey Selection mode is chosen

- 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 window, 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 with the help of the context menu command (go to Seamless Switching of an Automatic Survey on page 36 for more information).

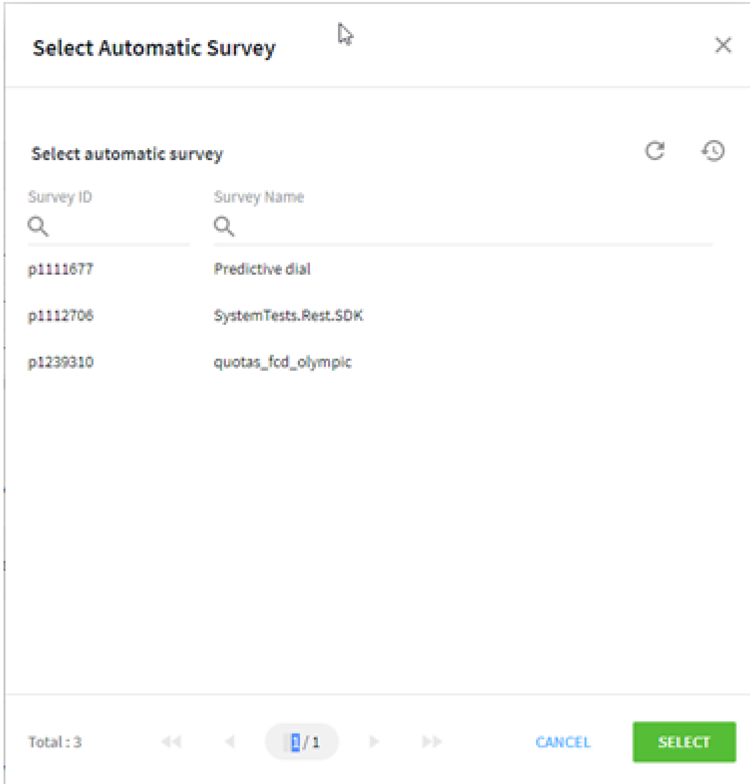


Figure 43 Selecting an Automatic survey in the Survey Selection task choice mode

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 269 for more information).

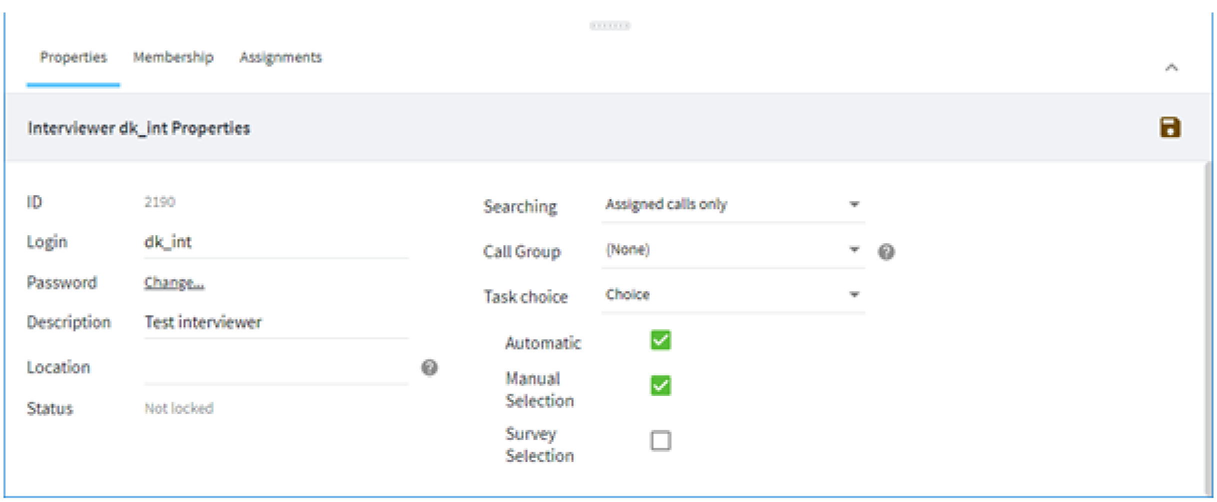


Figure 44 Interviewer properties, the Properties tab - the Choice mode is selected

In case the supervisor specifies the Survey Selection option for an interviewer working in the Choice mode, he also gets an ability of specifying an Automatic Survey (just like when the Survey Selection task choice mode is selected - see description above). An Automatic Survey assignment procedure in the Survey Selection mode is similar to the one described above.

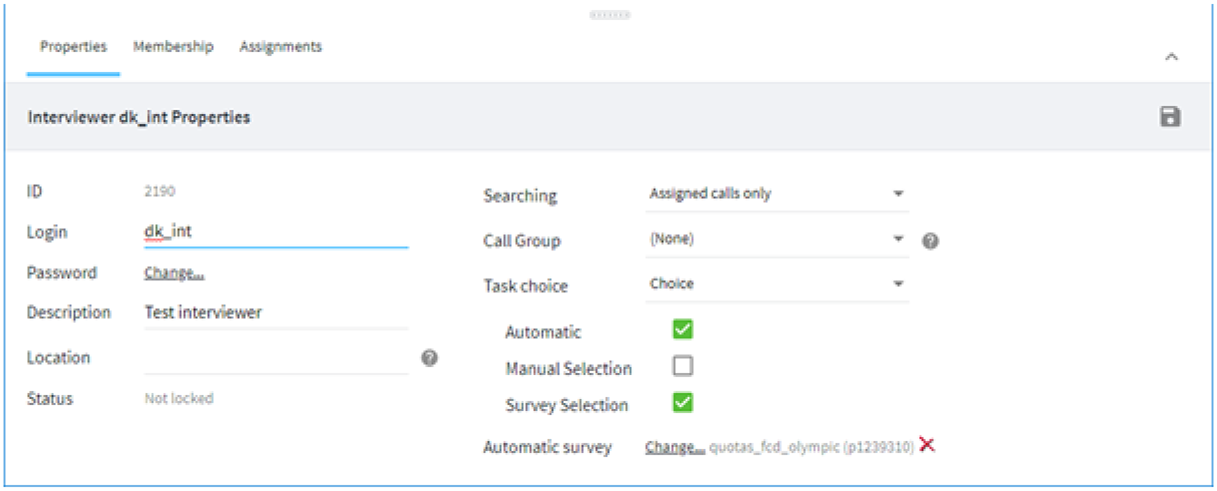


Figure 45 Interviewer properties, the Properties tab - the Automatic Survey option is selected for the interviewer working in the Choice mode

The Task Choice mode can also be changed from the Interviewer List (see Viewing the Interviewer List for instructions on how to view this list). This operation is performed with the help of the context menu command Change Task Choice - this context menu is available for each interviewer displayed in this list (go to Changing the Task Choice Mode for an Interviewer on page 62 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 a certain **Dial Type**: they can either be assigned the “Landline”, or the "Cellphone" dial type. Select the Dial Type from the Dial Type drop-down box. 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 required option from the Dial Type drop-down box (go to Dialing in the Single Survey TCPA Mode on page 367 for more information).

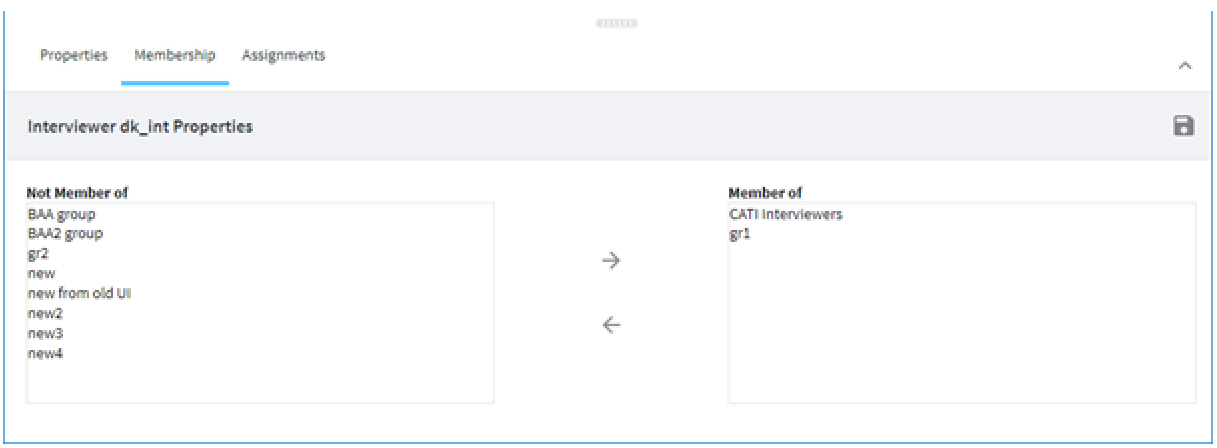


Figure 46 Interviewer properties, the Membership tab - the bottom right frame

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.

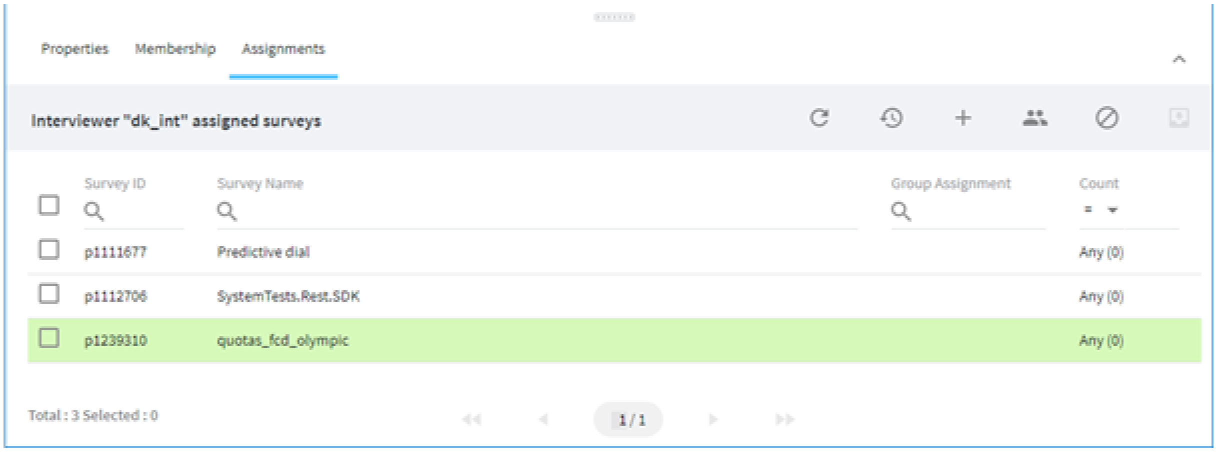


Figure 47 Interviewer properties, the Assignments tab - the bottom right frame

The Assignment tab contains the list of all existing assignments made for the currently selected interviewer.

The Assignment tab indicates particular assignments that were made for the group which the interviewer belongs to. In case 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 following information for each assigned survey – the assigned project ID, its name, indication of the group assignment, and the number of calls assigned for the interviewer. A survey which has been selected as an Automatic Survey is highlighted in green.

You can assign new surveys to the interviewer by pressing the **New** button on the toolbar, or by right-clicking any row and choosing New from the shortcut menu.

This action displays the Select Surveys to assign dialog window.

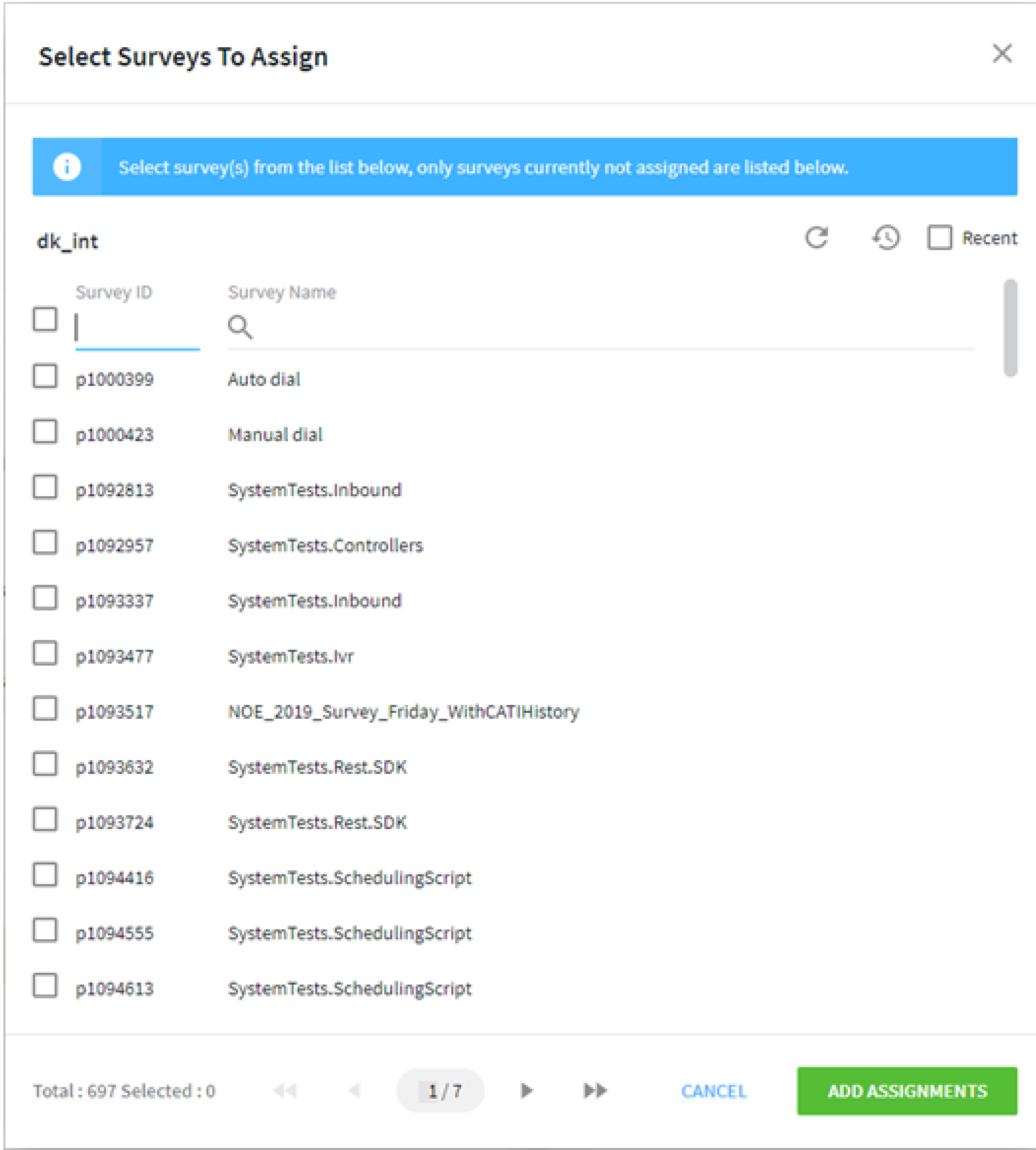


Figure 48 Selecting a survey to assign using the Select surveys to assign dialog window

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

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 127 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 367 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 window.

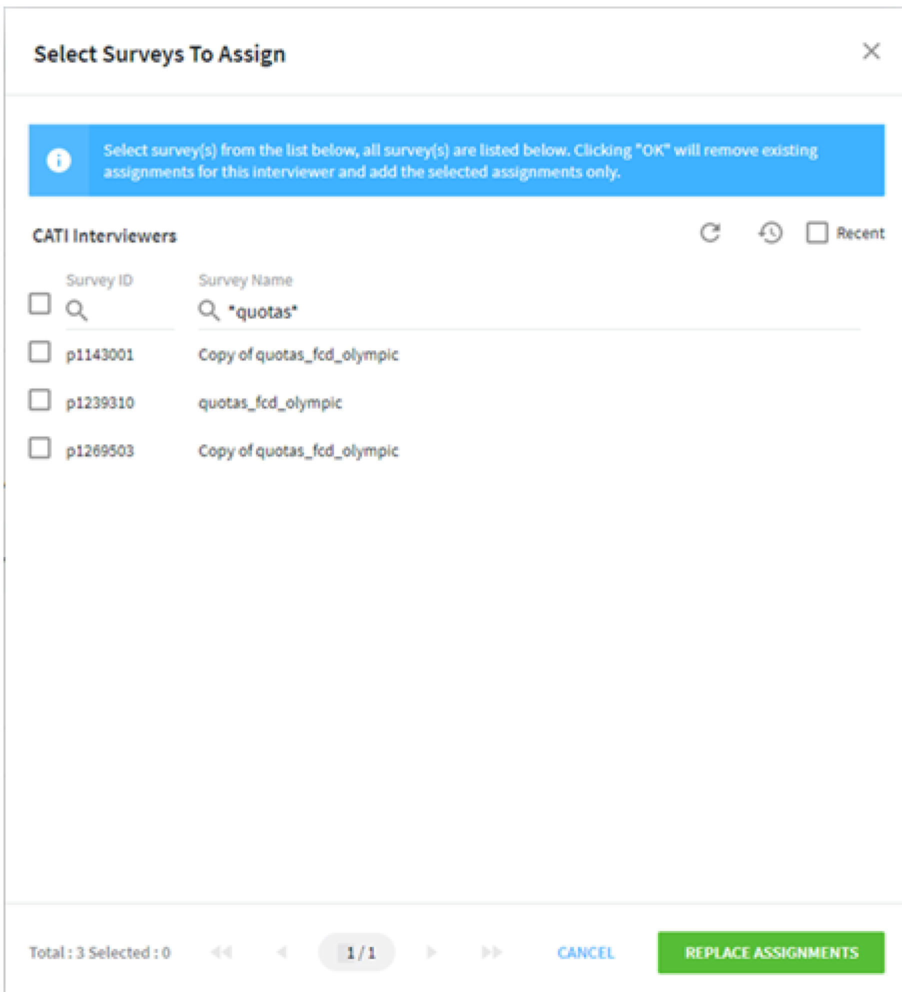


Figure 49 Selecting surveys to replace the existing assignment for an interviewer

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.

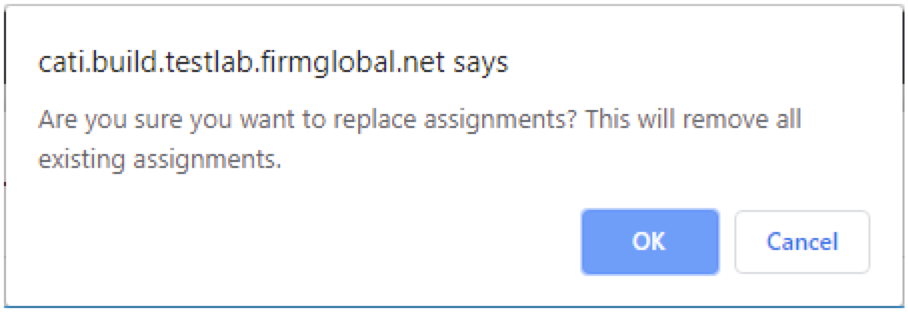


Figure 50 Warning message displayed on the attempt to execute the assignment replacement

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.

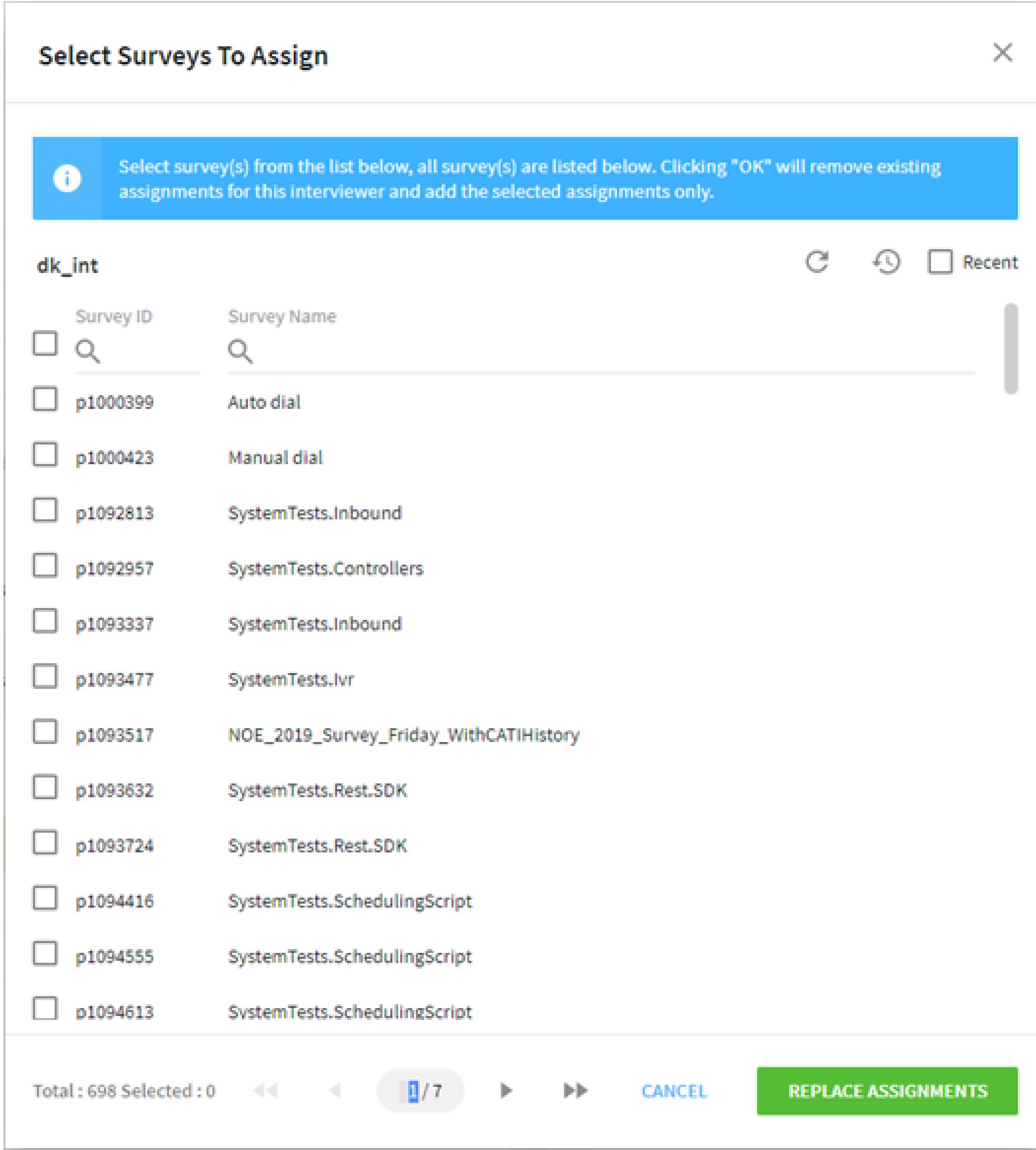


Figure 51 Replacing an assigned survey from the Assignments tab

6. To set an Automatic Survey for the interviewer 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.

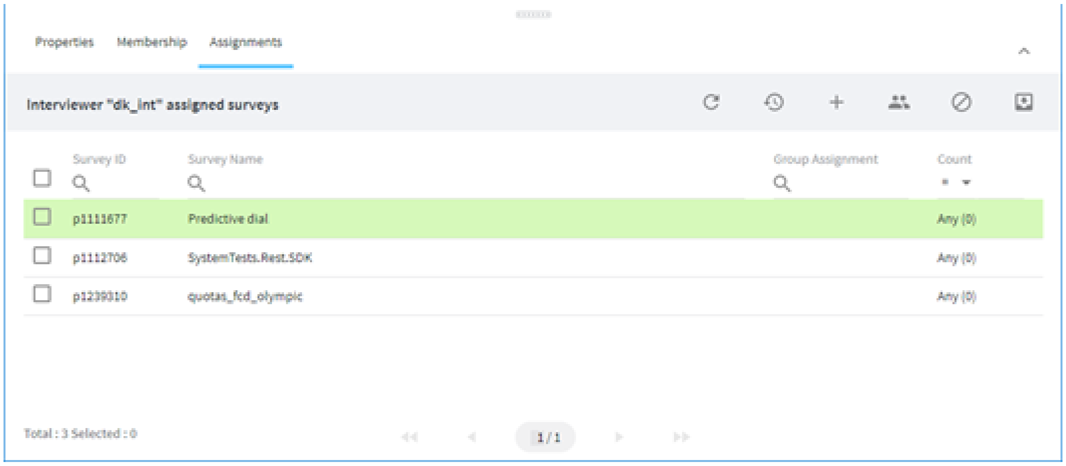


Figure 52 The Automatic Survey selected for the interviewer from the Assignments tab

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.

7. Added surveys can be de-assigned (removed from the list) via the Assignments tab – select the required surveys by checking boxes in front of their names in the list and 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.

   The CATI Supervisor will display the dialog box asking you to confirm the action. Click **OK** to proceed with the De-assign action. The bottom right frame will be refreshed and the chosen surveys will disappear 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.

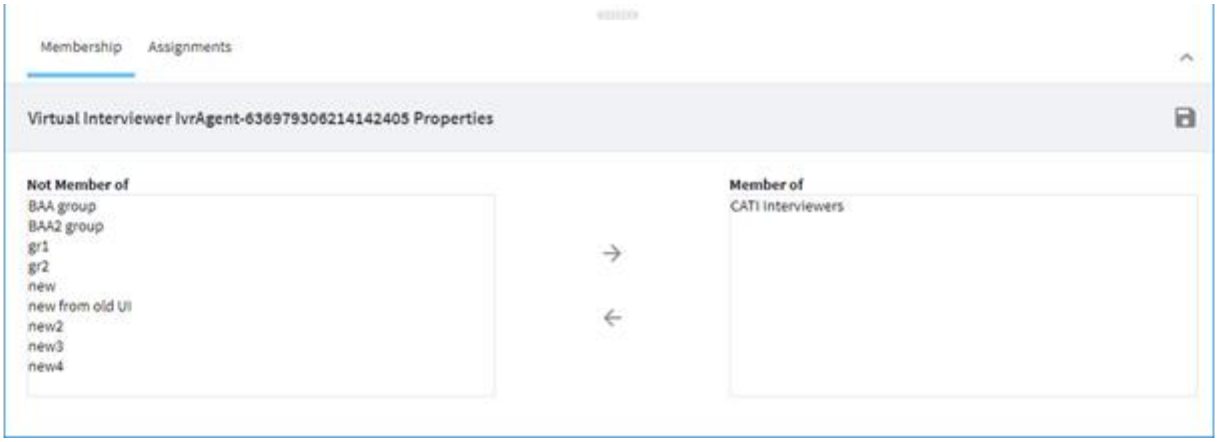


Figure 53 The Membership tab of an IVR agent properties

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.

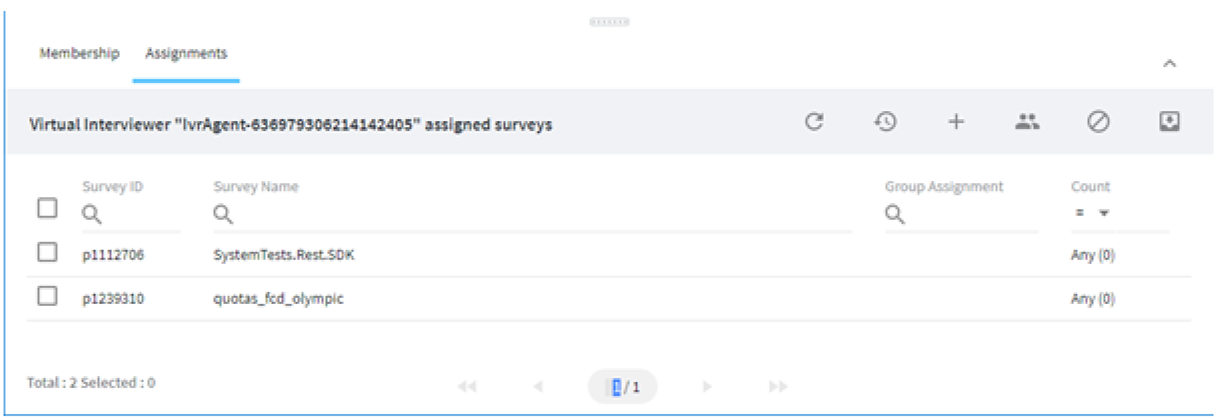


Figure 54 IVR agent properties, the Assignments tab

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.

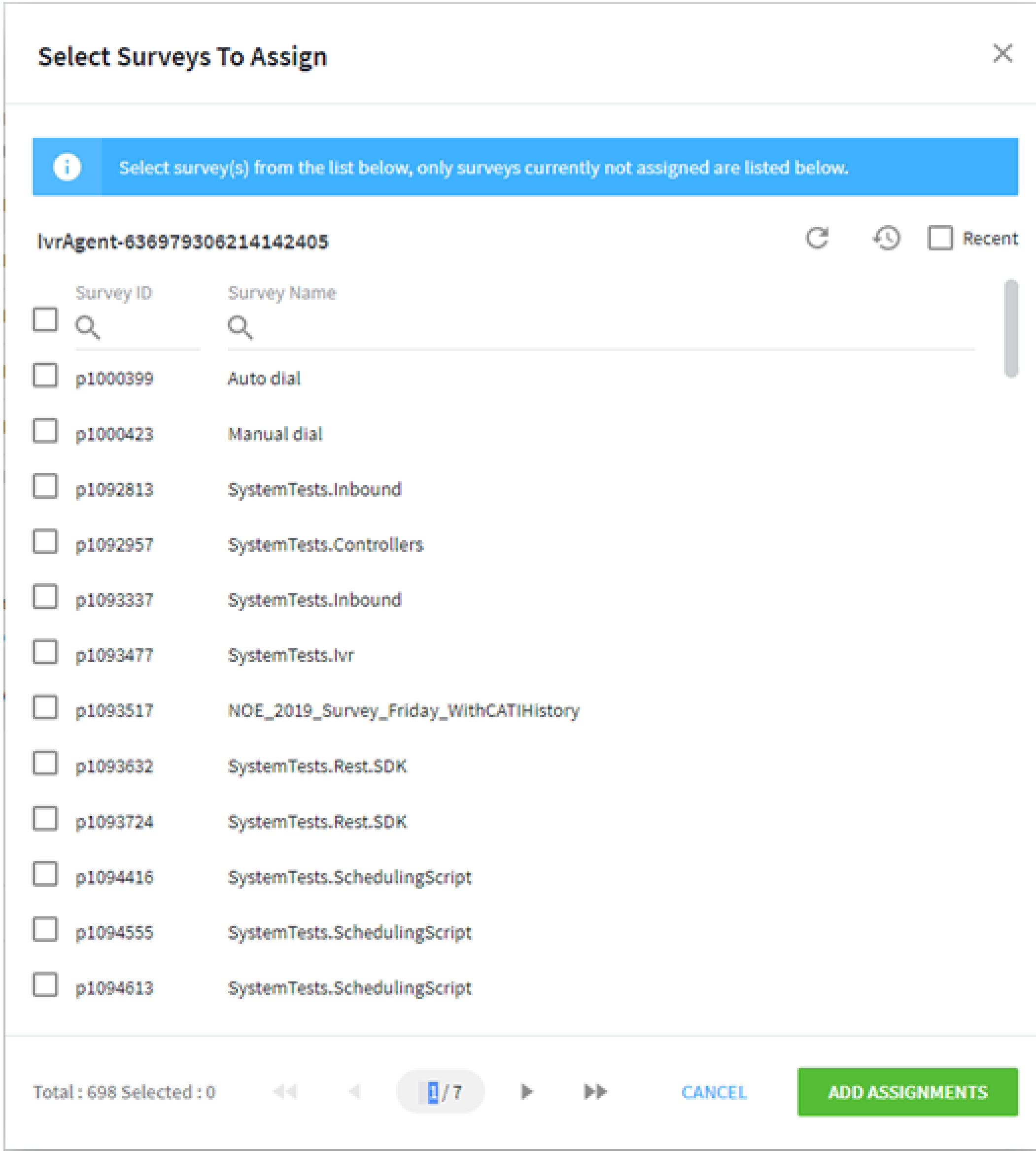


Figure 55 Selecting a survey to assign using the Select surveys to assign dialog window

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 127 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 367 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.

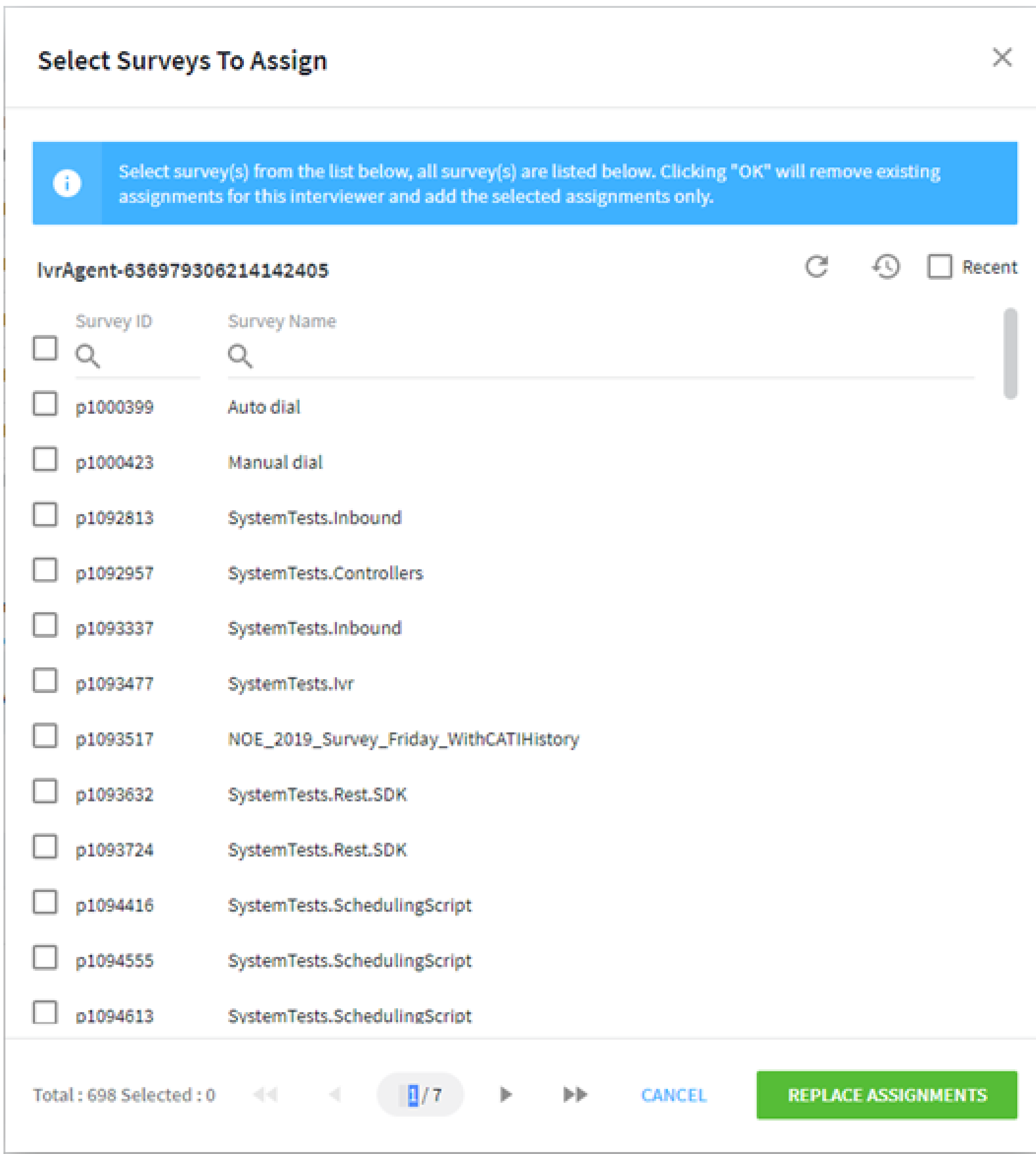


Figure 56 Selecting surveys to replace the existing assignment for an IVR agent

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.

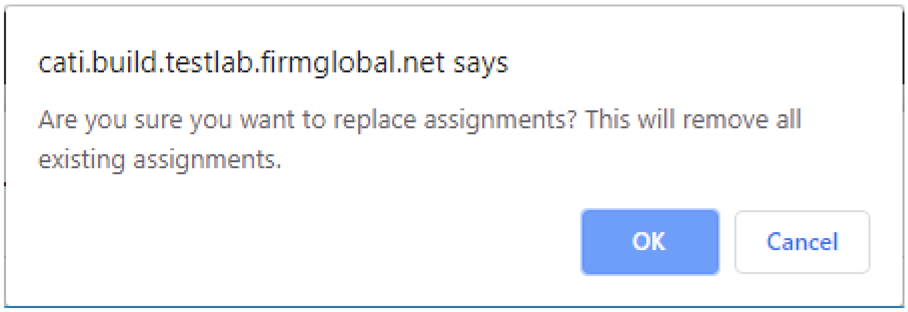


Figure 57 Confirmation message

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 be performed for one interviewer at a time, not for a multiple selection.

Adding and replacing assignments in that case is performed with the help of the dedicated dialog windows 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 in the top frame (see (go to Viewing the Interviewer List on page 25 for more information) for instructions).
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. This will display the "Add Assignment" dialog.

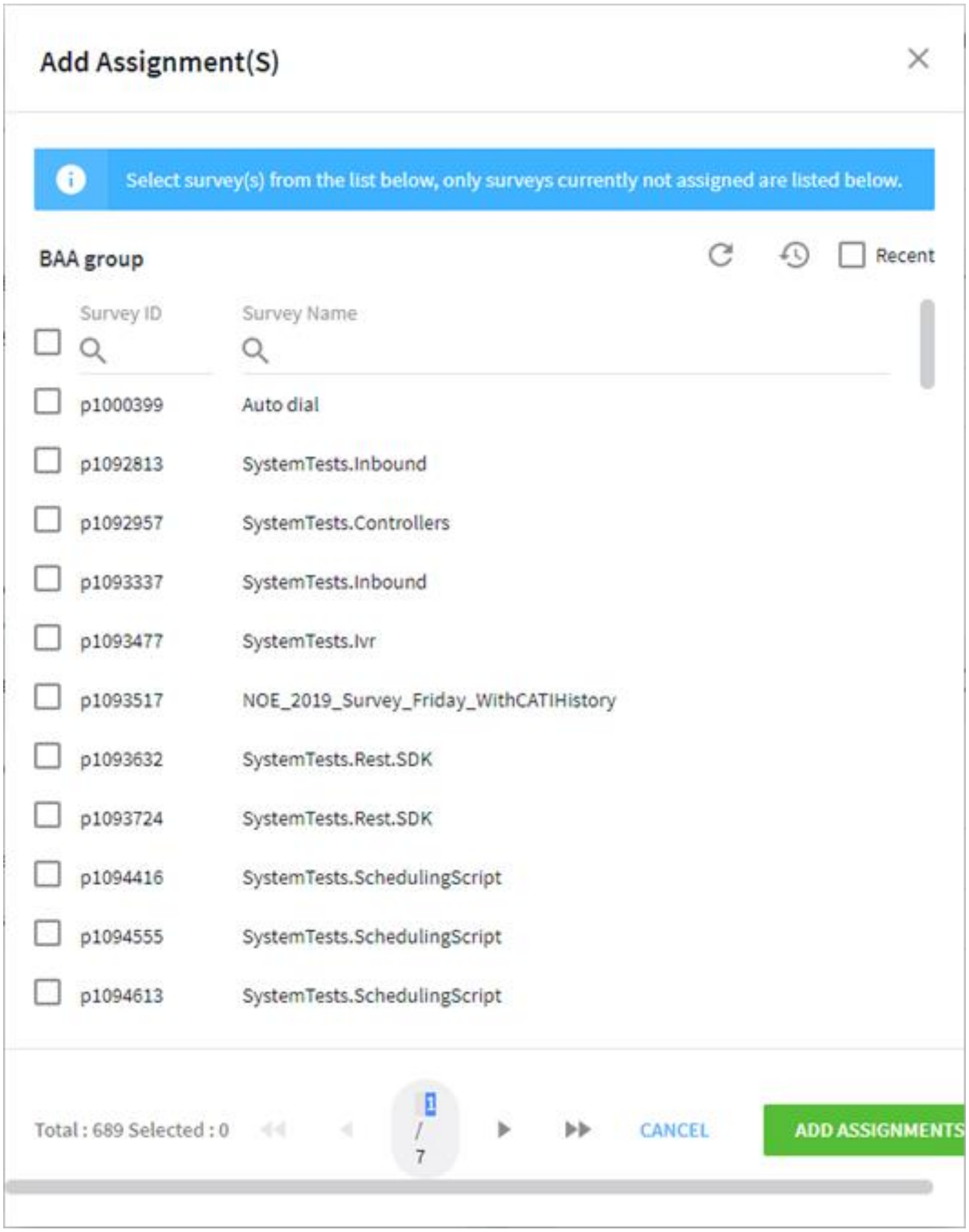


Figure 58 Selecting a survey to assign in the Add Assignment window

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

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

3. 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. Refer to (go to Recent Surveys on page 128 for more information) for details regarding this option.
4. Click the "Add Assignments" button to confirm the selection. The Add Assignment dialog window will close, and the selected survey(s) will be 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 in the top frame (see (go to Viewing the Interviewer List on page 25 for more information) for instructions).
2. Right-click the required interviewer in the list (multiple selection is not supported), and choose "Replace assignment" from the context menu that appears. This will display the "Replace Assignment" dialog.

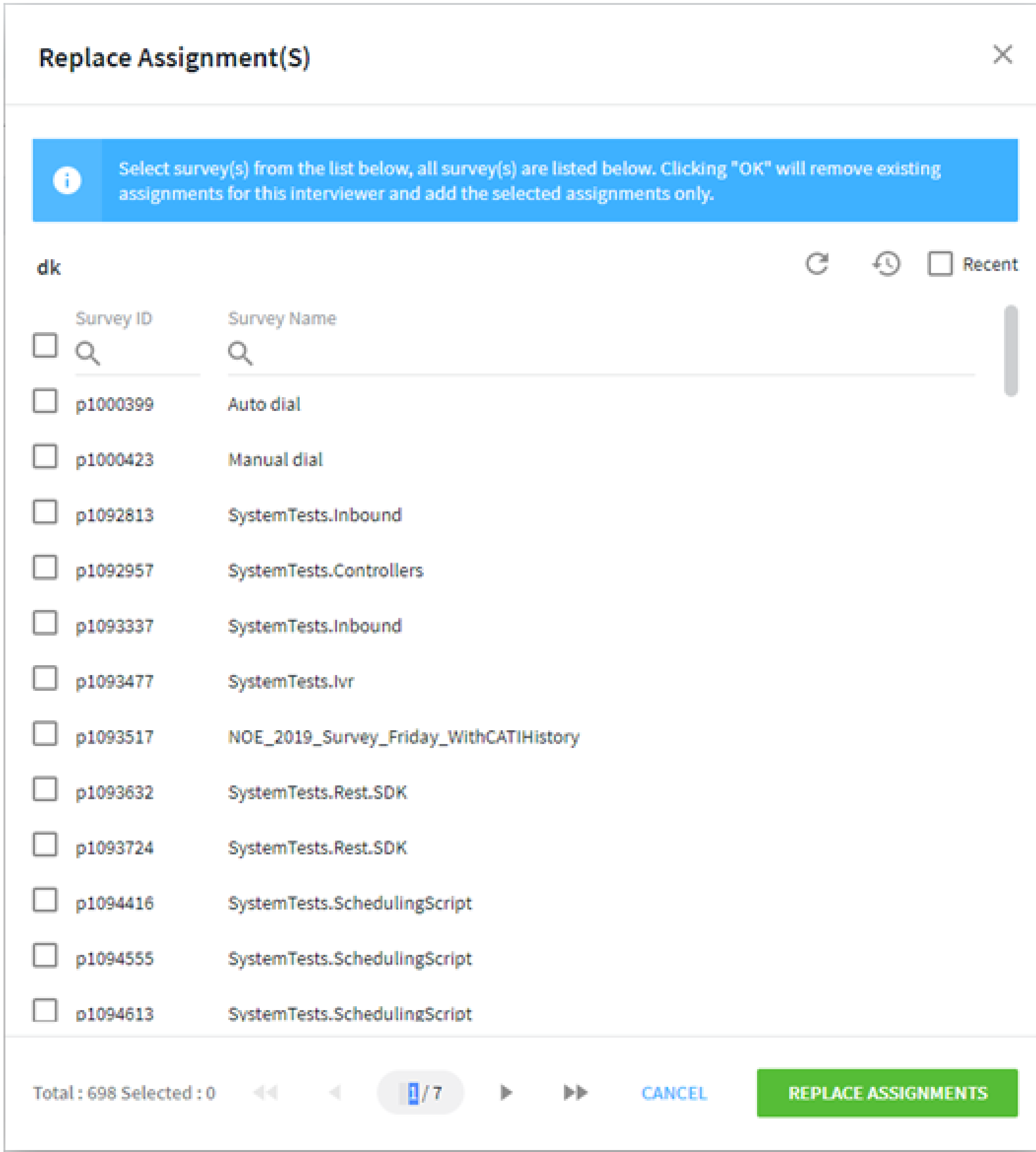


Figure 59 Selecting a survey to replace assignment in the Replace Assignment window

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

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

3. Refer to (go to Recent Surveys on page 128 for more information) for details regarding the Recent Surveys option.
4. Click the "Replace Assignments" button to confirm the selection. The Replace Assignment dialog window will close, and the selected survey(s) will 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. This greatly speeds 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 should be saved in XLS format.

The format of this file is quite simple – each interviewer property set stands for one record which should contain the following fields – login, password, description, group membership. Each sheet row is a record, and each column is a field.

You have an option of either importing the file automatically, or assigning specific meaning ("role") to each column manually.

Below is the list of supported properties, or "roles" (they should be created as columns). Value format in the column cells should be 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 - interview task choice mode specified for the interviewer. This column can contain either verbal, or numeric values. The following values are used to indicate the task choice mode: 1, or Automatic; 2, or Manual; 3, or Survey; 4, or Choice.

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

The above listed column roles are specified in the very first row of the imported file. This is necessary in case you enable the Import the first row option. Please always check the spelling of each "role" - CATI Supervisor module will reject the file in case any "role" name is misspelled (see the correct name spelling in the list above).

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

The order in which columns stand in the imported file is important only in one case - a) if 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 (see instruction below for explanation of these options). In this case columns should stand in the following order (left to right) - Group, Login, Password, Person, Description, Task Choice.

Columns can be placed in any order as long as you are either importing the first row containing column headers, or assigning the column roles manually (see instruction below for details on both procedures).

The imported file may look somewhat like this when opened in MS Excel.

	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 60 Example of MS Excel file containing the interview list

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

To import a file containing the interviewer list:

1. First navigate to the group you want to import the interviewer list into, and display the interviewer list in the top right frame (see Viewing the Interviewer List for instructions).

2. Click the Import button  on the toolbar. This will display the Import modal window.

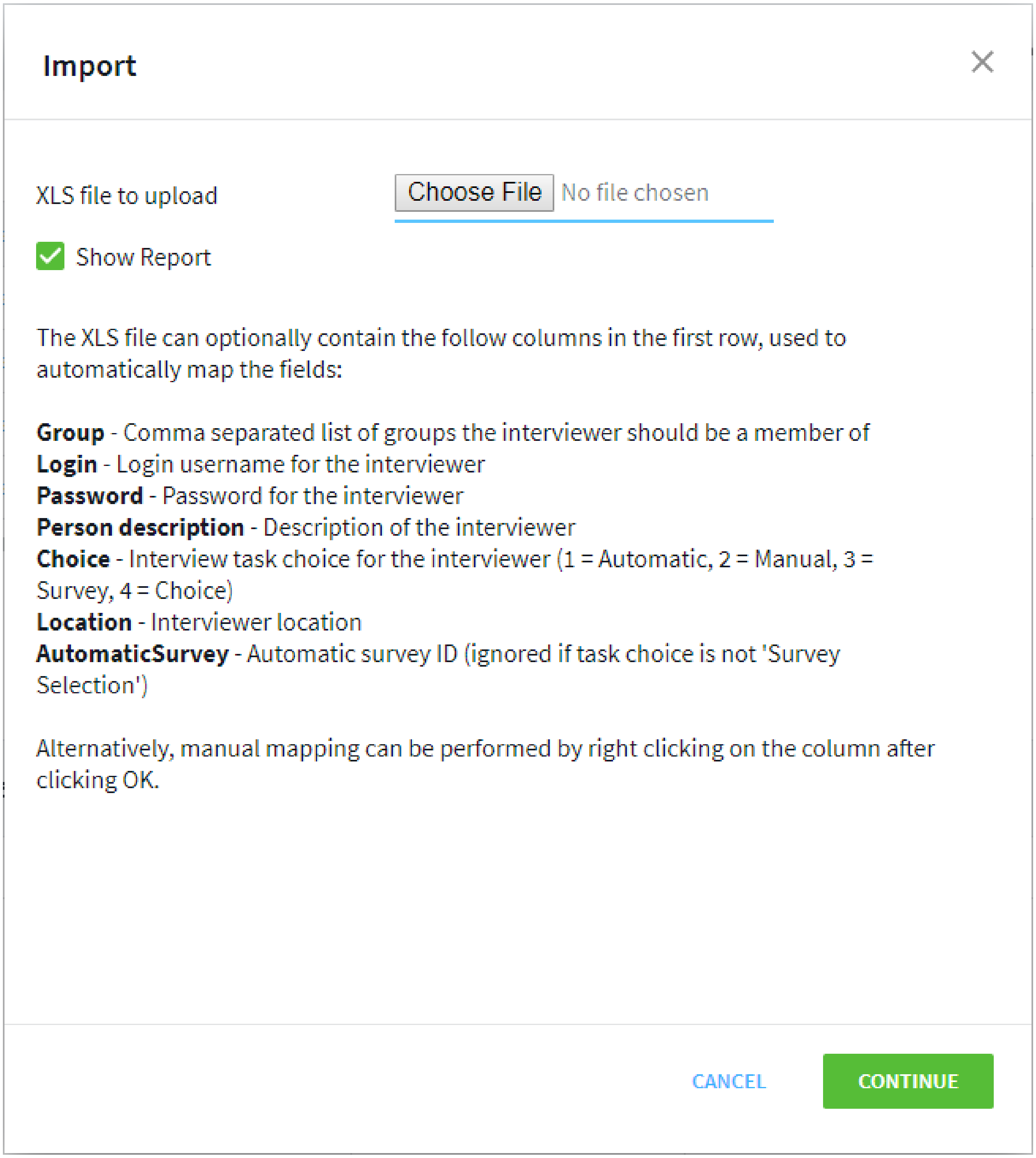


Figure 61 Importing the interviewer list from a file

3. The Import modal window 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 by CATI system:

- Group
- Login

- Password
- Person description
- Choice
- Location
- AutomaticSurvey

4. Check the Show Report box to generate a report regarding the import results – it will be generated after the successful import procedure finish and will contain details on the file contents and the destination group.
5. Click the Browse button to navigate to the file you are going to import. This will display the standard Windows Open File dialog box. Select a file and click Open. The Open File dialog box will then close, and the file name and path will be displayed in the XLS file to upload field.
6. Click OK to start the import procedure. The list contained in the imported file is then opened in the Import dialog window.

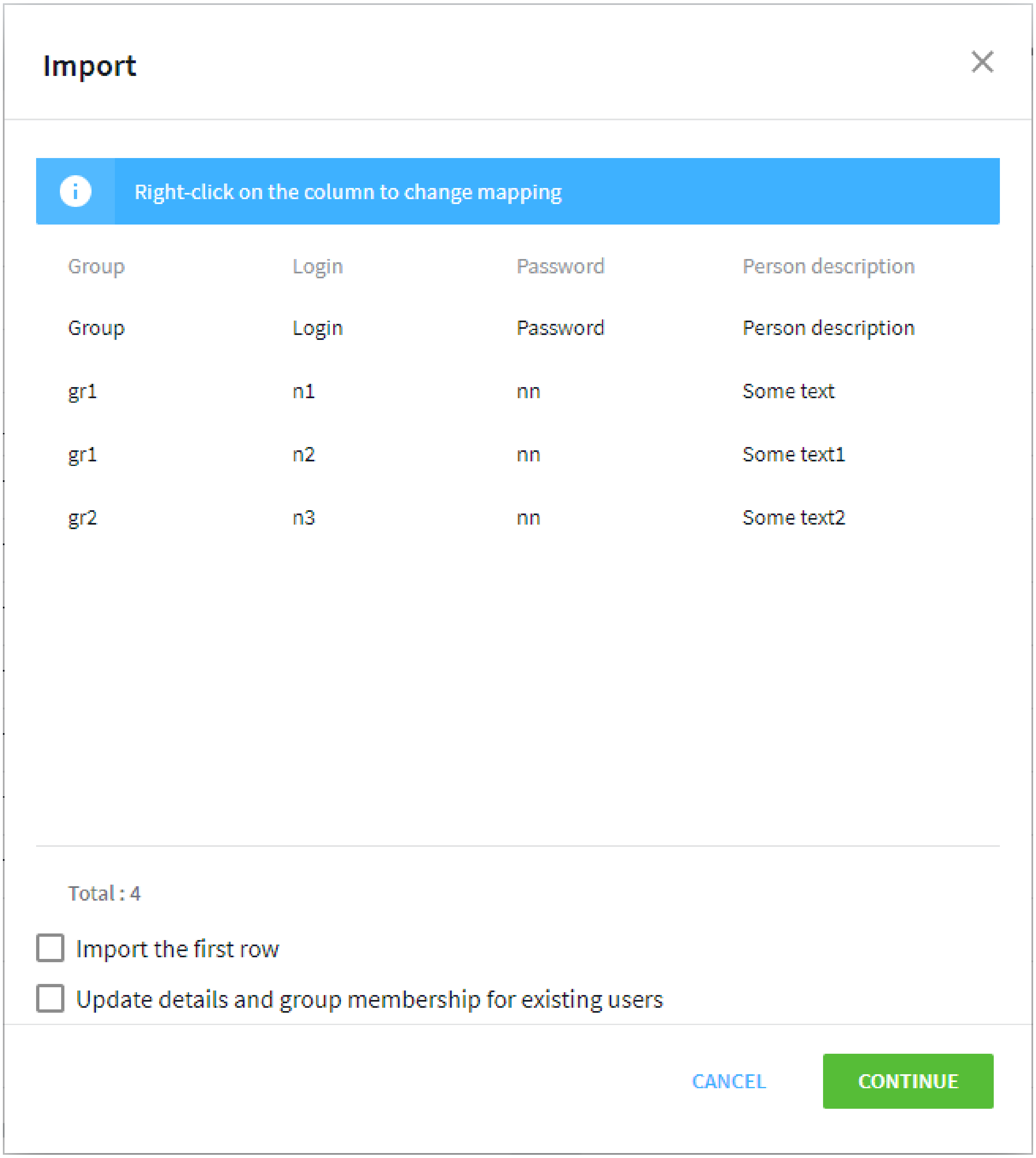


Figure 62 Importing the interviewer list from MS Excel file

Figure 63

7. You can decide whether or not you want to import the first table row. 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 info 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. There is an option for changing the column role - right-click the required column cell in the Import dialog window and choose Choose column role from the context menu that appears. This will invoke the submenu.

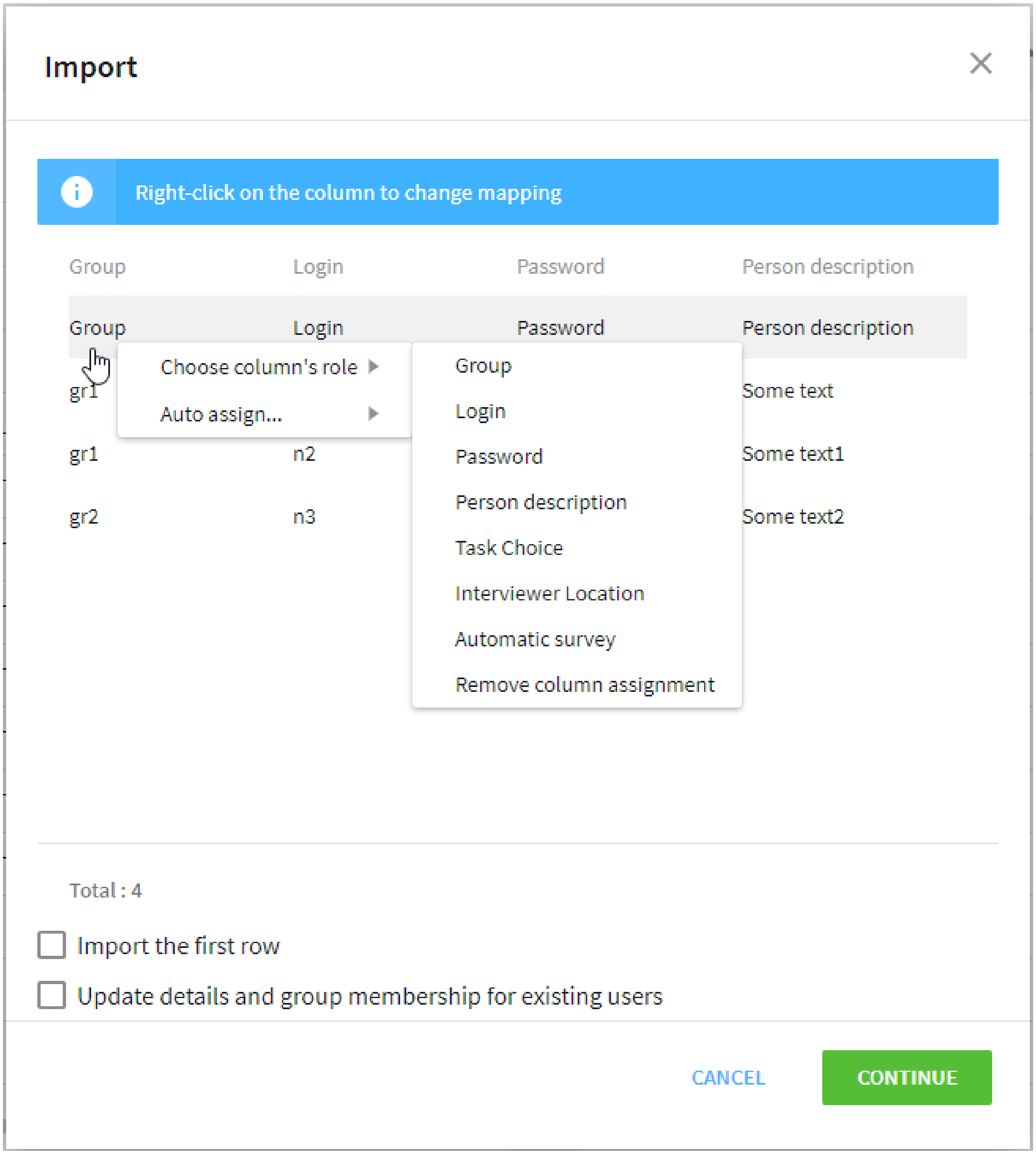


Figure 64 Assigning column roles to the imported table containing interviewer list

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

The following column roles are supported by CATI system:

- Group
- Login
- Password
- Person description
- Task Choice
- Interviewer Location
- Automatic survey

Or you can choose "Remove column assignment" from the same submenu to instruct CATI system to ignore this information at the import. In such case settings for all interviewers imported from this list will not contain the "removed" column.

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

- Based on values from the first row – this option will use values from the header row to assign column roles;
- Based on columns order – this option will create column role assignments automatically. In this case columns should stand ONLY in the following order - Group, Login, Password, Person Description, Task Choice. Mind that incorrect column order will result in mixing interviewer properties. The first row in this case should NOT contain column role names.

10. Finally click OK in the Import dialog window to start the import procedure. After a short while the Interviewer list will be populated with persons described in the imported list.
11. As soon as new IVR agents are created after the Import operation, the login procedure is started for all of them - see for explanation.

2.2.10. Changing the Task Choice Mode for an Interviewer

As a rule the Task Choice mode is specified for each interviewer at the moment their properties are configured - see Viewing and Modifying the Interviewer Properties for details.

However the supervisor can change the task choice mode for any existing interviewer without displaying the interviewer properties in the bottom right frame. This operation is accomplished with the help of the Change Task Choice context menu command.

To change the task choice mode for an interviewer:

1. Display the Interviewer List in the top frame (see Viewing the Interviewer List for instructions).
2. Right-click the required interviewer in the list and choose Change Task Choice from the context menu. This will display the Change Task Choice dialog window.

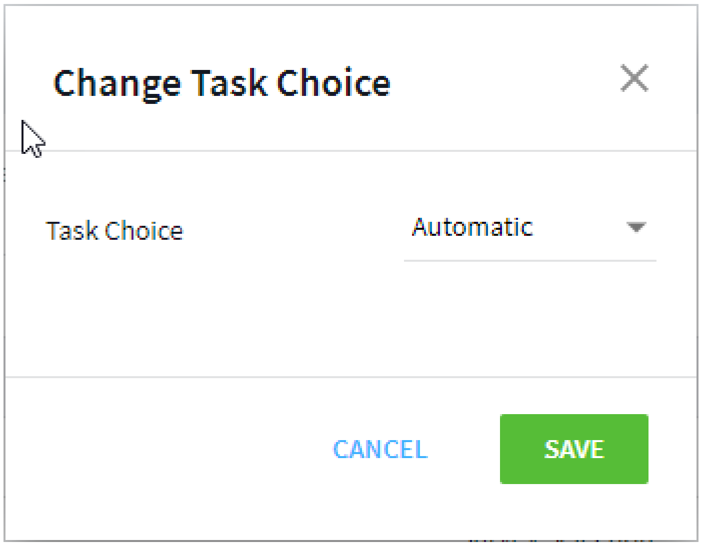


Figure 65 Changing the task choice mode for an interviewer from the interviewer list

3. The Change Task Choice dialog window may look differently depending on what task choice you select from the Task Choice drop-down list.

   When the Automatic or Manual Selection task choice mode is chosen the Change Task Choice dialog window looks similar to that shown in the picture above.

   When the Survey Selection mode is chosen the Change Task Choice dialog window refreshes and then looks like that - see the picture below.

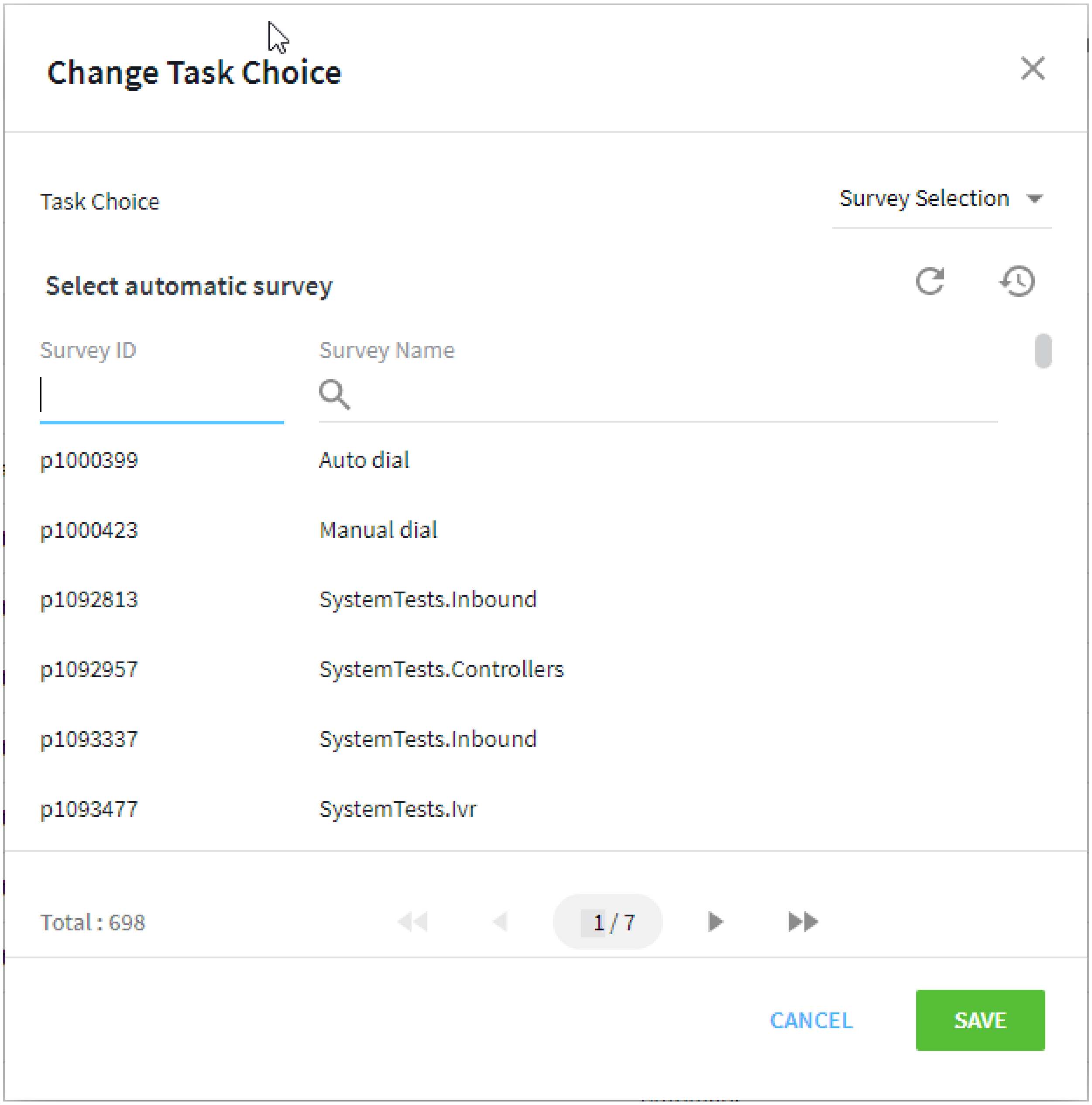


Figure 66 The Change Task Choice modal window with the Survey Selection mode chosen

You have to select a survey the interviewer will work with to set up this task choice mode.

When the Choice mode is chosen the Change Task Choice dialog window refreshes and then looks like that (see the picture below).

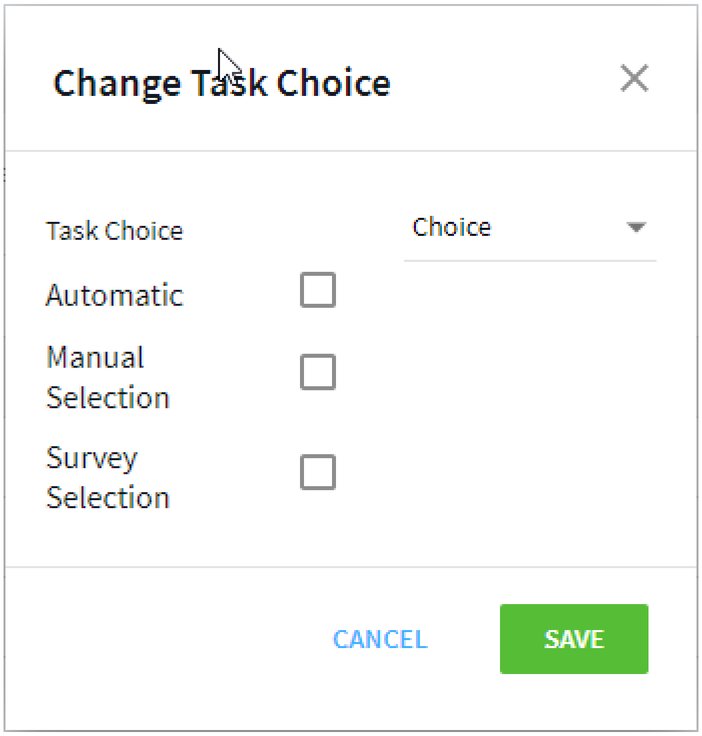


Figure 67 The Change Task Choice modal window with the Choice mode chosen

You have to check the corresponding boxes to make these task choice modes available for the interviewer when he logs into the CATI Interviewer Console.

Selecting the Automatic and Manual Selection modes does not require any additional configuration. When the Survey Selection mode is checked you have to additionally configure this option, and specify the survey. Then the dialog window refreshes and starts looking like this.

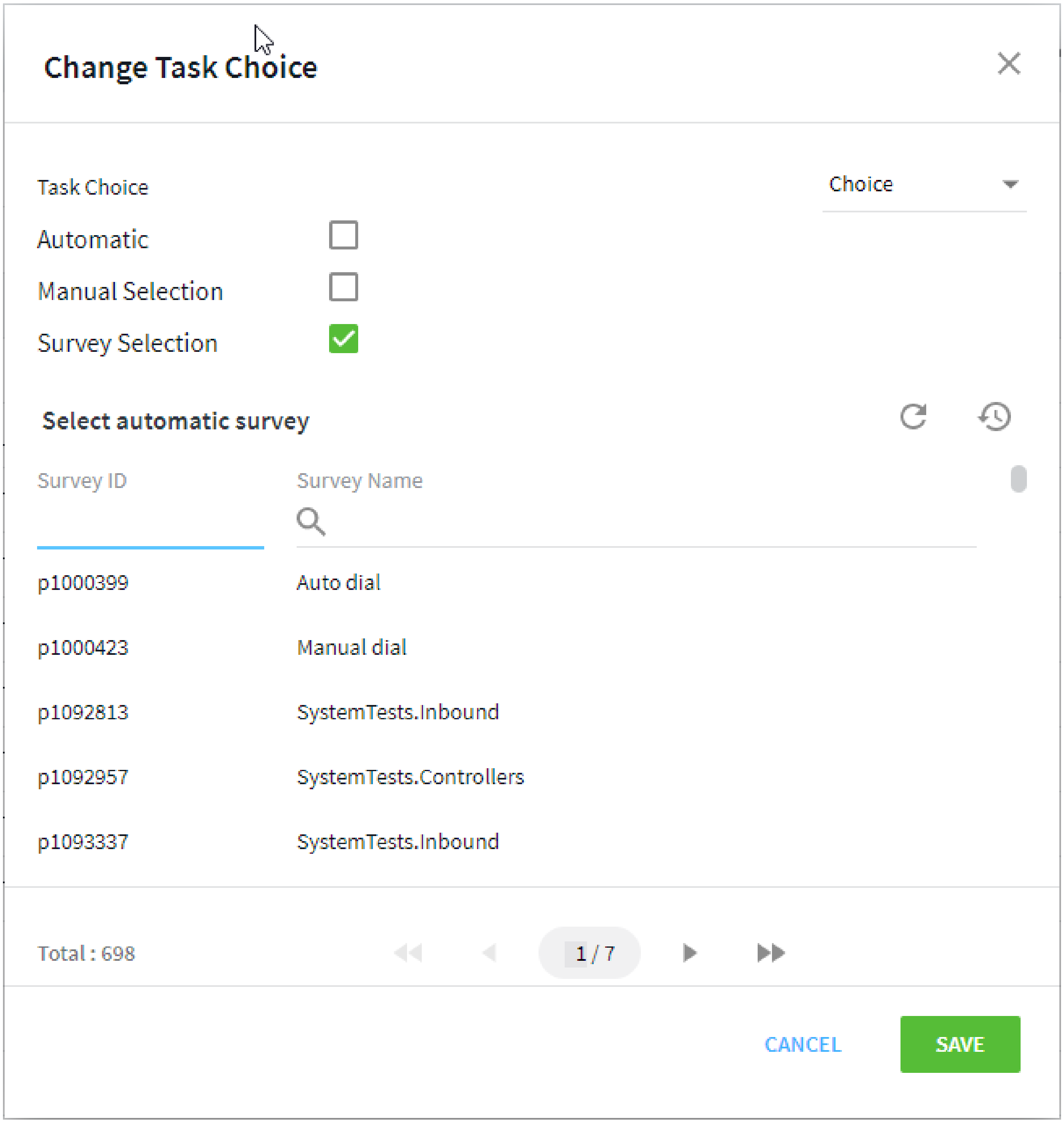


Figure 68 The Change Task Choice dialog window with the Choice mode chosen - configuring the Survey Selection mode

Just like you would have selected the survey for the Survey Selection mode, you have to select one in this case.

4. When the required task choice mode is configured - click OK.

2.2.11. Changing a Location for an Interviewer

CATI Interviewers can be assigned a free text Location attribute. This attribute will be passed to a connected dialer. This is an optional property. 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! Please 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 39 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.

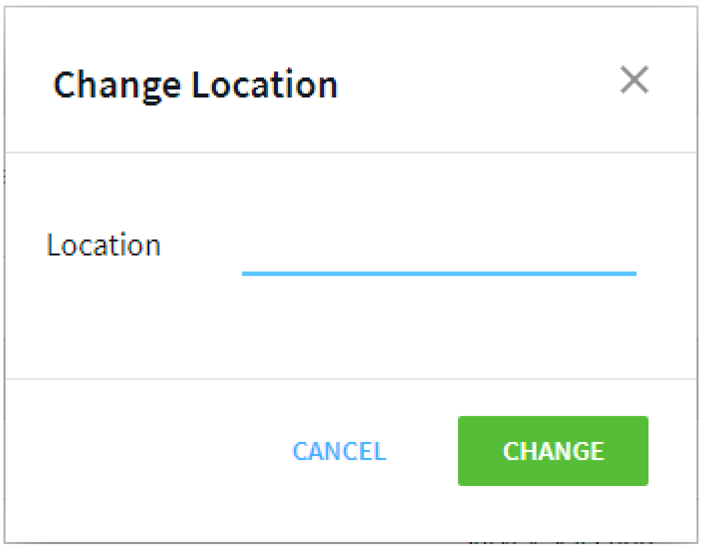


Figure 69 Changing the location attribute in the Change Location dialog

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 applying custom call delivery rules by choosing from a number of preconfigured call sets - for full description of the option and configuration procedure refer to (go to Configuring the Call Groups on page 349 for more information).

Changing 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.

   This will display the Change Call Group modal window.

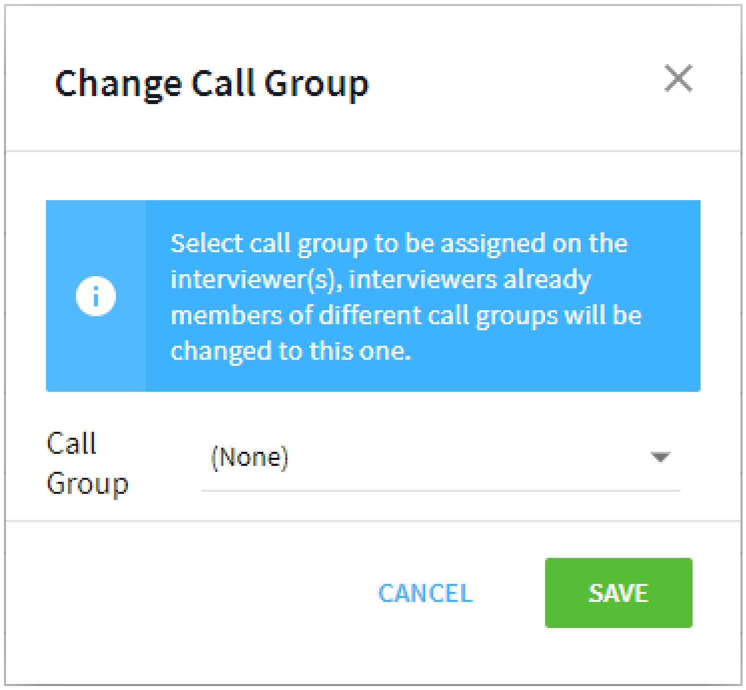


Figure 70 Changing the Call Group for an interviewer

1. Select the required Call Group and click the Save button 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 Confirmit Authoring module (refer to the Confirmit Authoring manual for details). Then the survey becomes available for managing in the CATI Supervisor module.

You should keep in mind that availability of a survey to a particular supervisor in CATI Supervisor module is determined by a special permission which is set up in Confirmit 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 Confirmit 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 195 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).

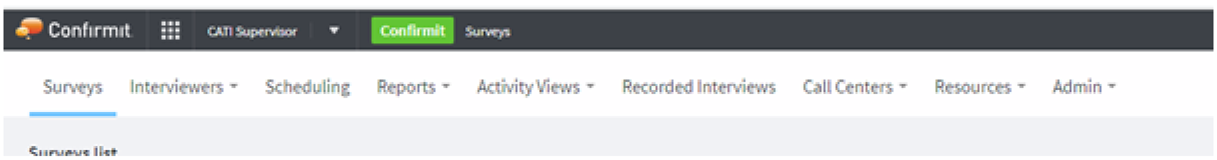


Figure 71 Accessing the Surveys tab in the Main menu

3.1. Viewing the Survey List

To view the survey list:

1. Select the Surveys tab in the Main menu in the left frame. This will reveal the list of all surveys currently existing in the company.

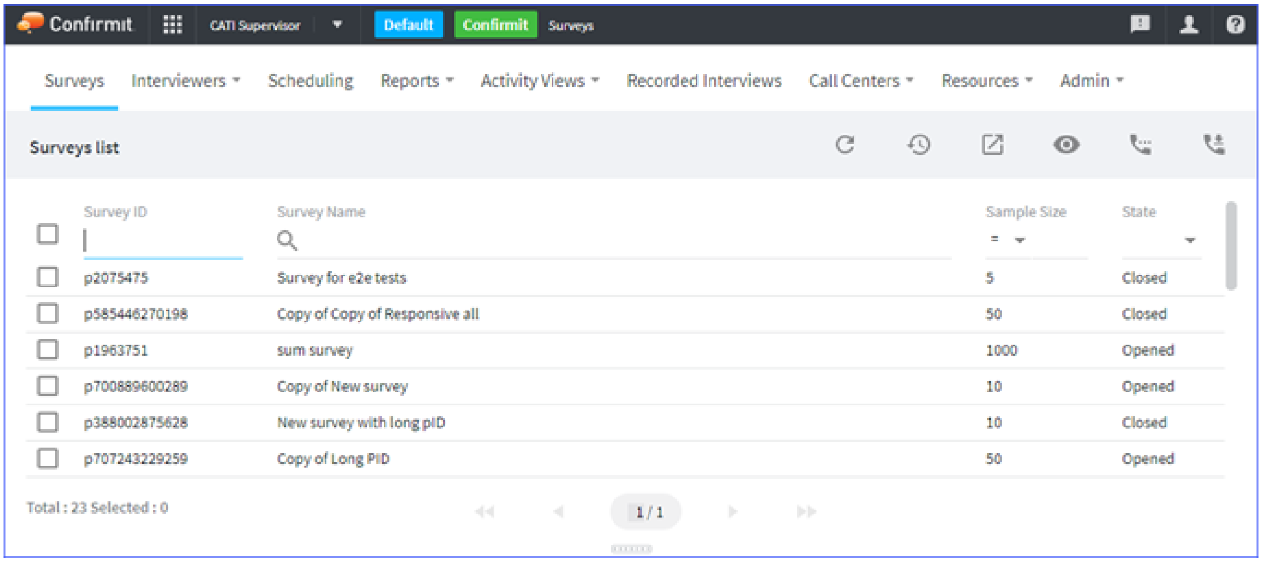


Figure 72 Viewing the survey list

2. The supervisor can perform the following operations with surveys:

- Open, close and shutdown a survey;
- View and modify the survey properties;
- View and modify the survey assignment settings;
- Manage interviews and calls for the selected survey;
- Export the list of call activity for the selected survey during the selected period
- Generate a variety of reports for a selected survey;

  All the above listed operations are performed by either choosing commands from the shortcut menu (activated by right-clicking the grid row containing the appropriate survey), or by pressing buttons on the toolbar (the toolbar is located right above the grid).

4. 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 window
	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

Interviewing on a survey is only possible if this survey is in the "**Opened**" state.

A special parameter – a survey state – indicates the accessibility of a survey for conducting interviews. It may have two values – Open and Closed. A survey with its state set to Open can be used for conducting interviews. When the state is set to Closed, the survey becomes inaccessible for conducting interviews. The survey state is changed manually, when interviewing process needs to be started, or finished. The current survey state is displayed in the State column. This column is the part of a grid showing the list of surveys. This grid is displayed when the user chooses the Surveys tab in the Main menu.

The supervisor can change the survey state whenever it is required.

3.2.1. Opening and Closing a Survey

To change the survey state:

1. Choose the Surveys tab in the Main menu to display a list of available surveys.
2. To change the survey status right-click the grid row, containing the parameters of the required survey, and choose respectively Open or Close from the context menu.
3. The survey list is refreshed. The State column shows the current survey state.

When performed, the Close command instructs the system to wait until all interviews currently in progress are finished, or suspended, and 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 such 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 shutdown 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.

   This will display the survey information in the bottom right frame of the browser window.

2. To shutdown the survey right-click the grid row, containing the parameters of the required survey, and choose Shutdown from the context menu.
3. The contents of the top right frame are refreshed. 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 with the help of the Confirmit Authoring module – refer to the Confirmit 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.

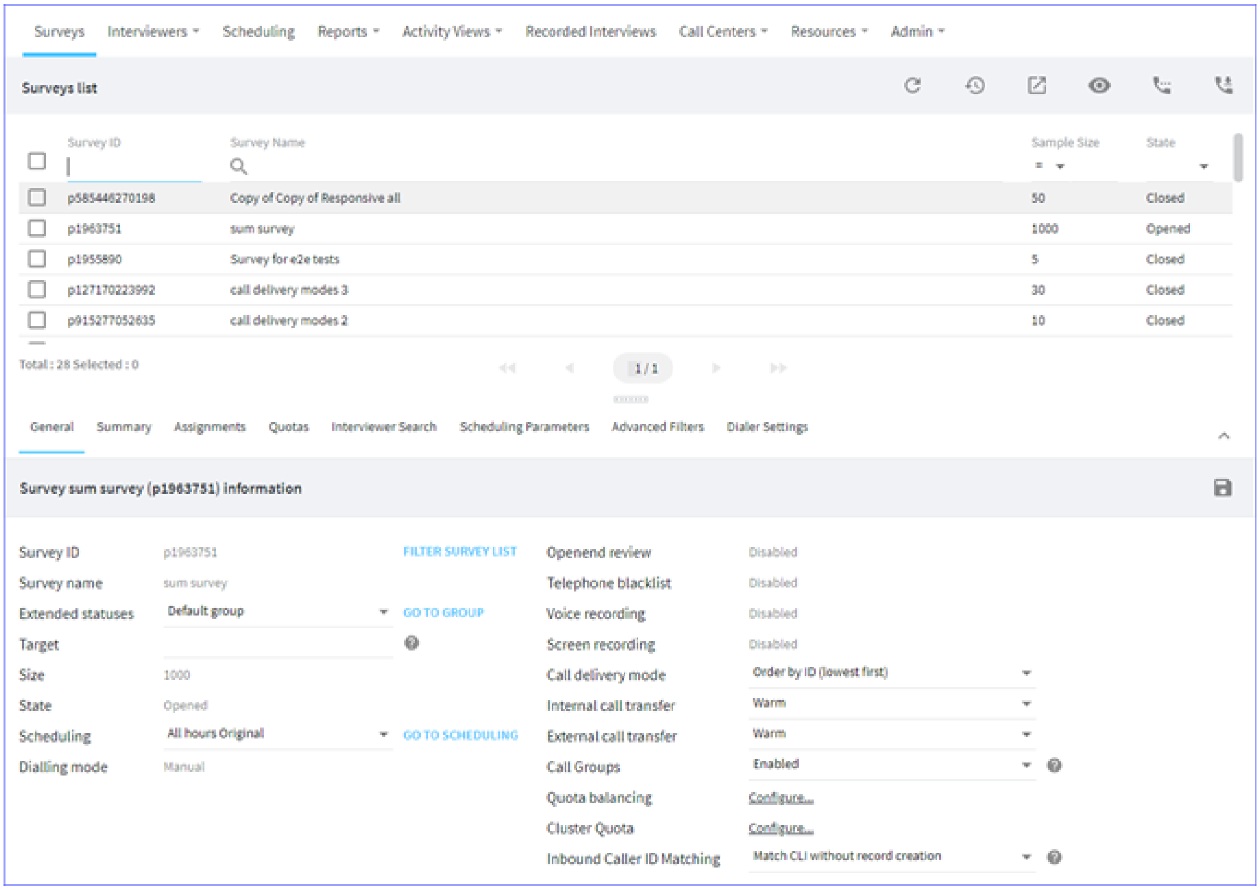


Figure 73 Survey properties displayed in the bottom right frame

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.

Click the Save button on the toolbar to apply changes when you are done modifying the property settings.

3.3.1. Viewing and Modifying a Survey's General Properties

To view and modify general survey 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.

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

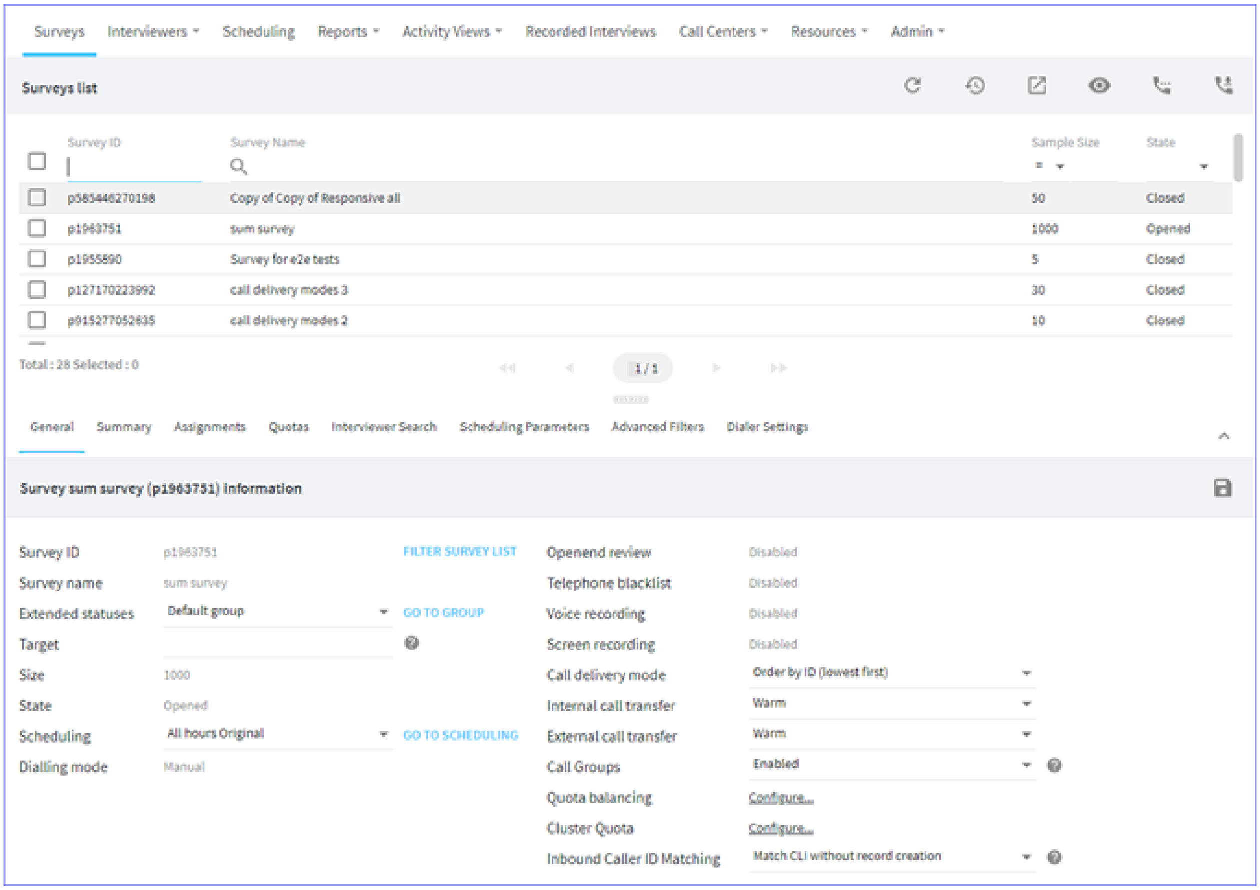


Figure 74 Survey properties - General tab

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 Confirmit 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 Confirmit 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 344 for more information) or Scheduling script (go to Modifying Existing Scheduling Script Settings on page 215 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 307 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 - see (go to Configuring the Survey List Activity View on page 310 for more information).
- The **Size** field displays the current amount 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 Confirmit 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 Confirmit Authoring manual for the instructions.
- The **Telephone Blacklist** option is enabled and disabled in the Confirmit 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 391 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 Deferred Monitoring in CATI Supervisor on page 334 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 185 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 Deferred Monitoring in CATI Supervisor on page 334 for more information).

  Note that Voice and Screen Recording options are set up in the Confirmit Authoring module. Refer to the Confirmit 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 task choice modes (go to Selecting a Survey/Interview on page 263 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. Refer to (go to Performing Call Transfers on page 288 for more information) for descriptions of both call transfer modes and procedure instructions.
- 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 (refer to (go to Configuring the Call Groups on page 349 for more information) for details). 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 97 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 102 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. Click the **Save** button on the toolbar to apply changes when you are done modifying the properties settings.

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

3.3.2. Viewing the Sample Information Corresponding to 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. Display the list of surveys by selecting Surveys in the Main menu.
2. Double-click the required survey in the grid.

   This will display the survey details in the bottom frame.

   Change to the **Summary** tab. It will show the amount of interviews for each status as of the present moment.

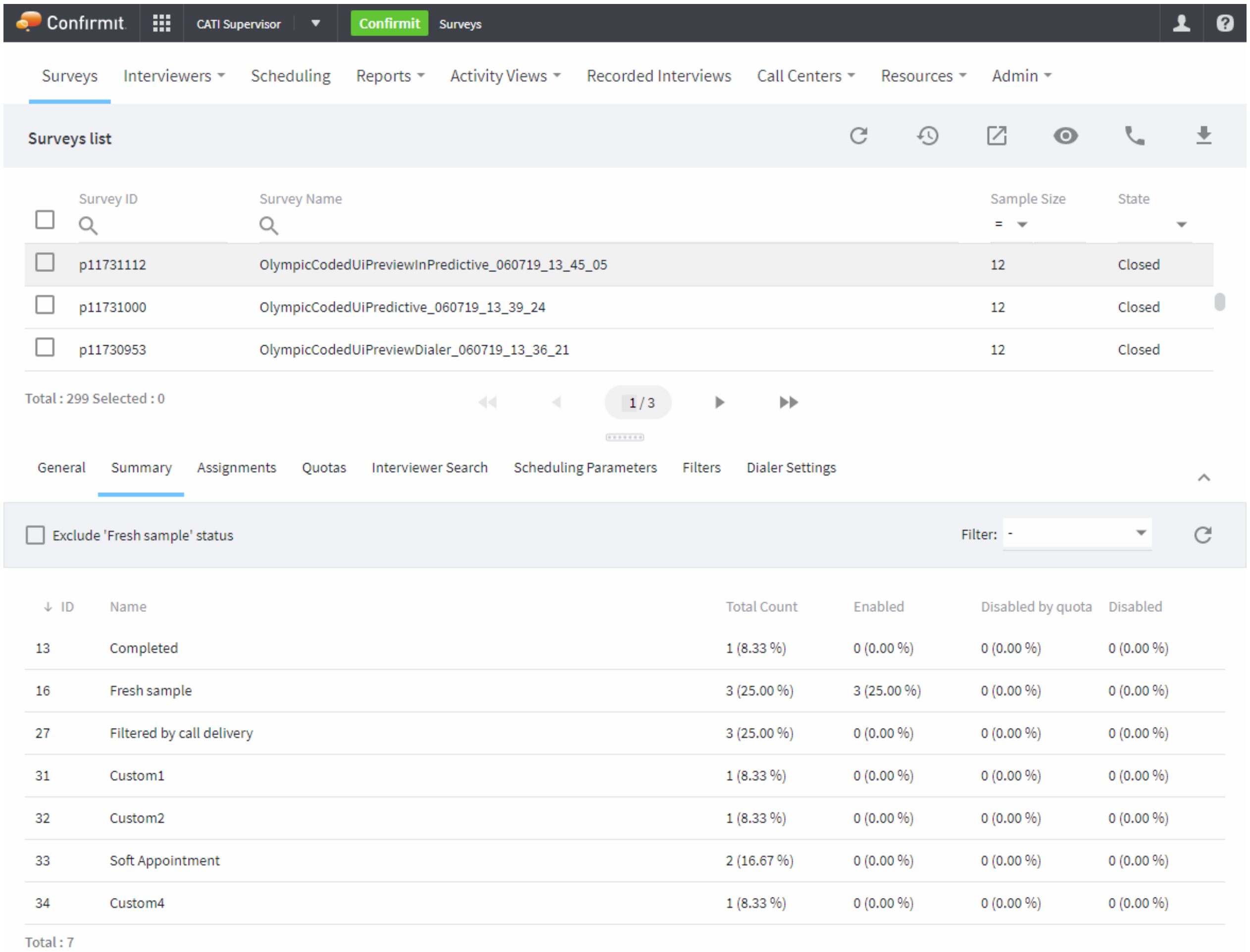


Figure 75 Survey properties - Summary tab

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 will provide the following information shown in columns:

- ID – Extended Status ID;
- Name – Extended Status name;
- Total Count – number of interviews with that Extended Status;
- Enabled - the amount of interviews that are both "Scheduled" and "Enabled" and have that Extended Status;
- Disabled by quota - the amount 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);
- Disabled - the amount 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 to the total number of interviews in the sample.

Note that enabling the "Exclude "Fresh Sample" status" option will change the percentage count - interviews with the "Fresh Sample" status will then be excluded from all percentage calculations to provide a percentage that is based purely on call outcomes, see the information below.

3. To focus on the records which have been attempted at least once supervisor can hide from view all interviews with the "Fresh Sample" status. This is done by checking the "Exclude "Fresh Sample" status" box. This will change percentage values for all displayed statuses - all calls with the "Fresh Sample" status will then be excluded from all calculations and percentage values will not take them into account.
4. Supervisor can apply a filter from the list of available filters. To do this he/she should select one from the Filter drop-down list. The list will then display only interviews matching the selected filter criteria. Note that the percentage figure is counted to the total amount of interviews in the sample.
5. Supervisor at any time can 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 188 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.

   This will display the survey properties in the bottom right frame of the browser window.
3. Go to the Assignments tab.

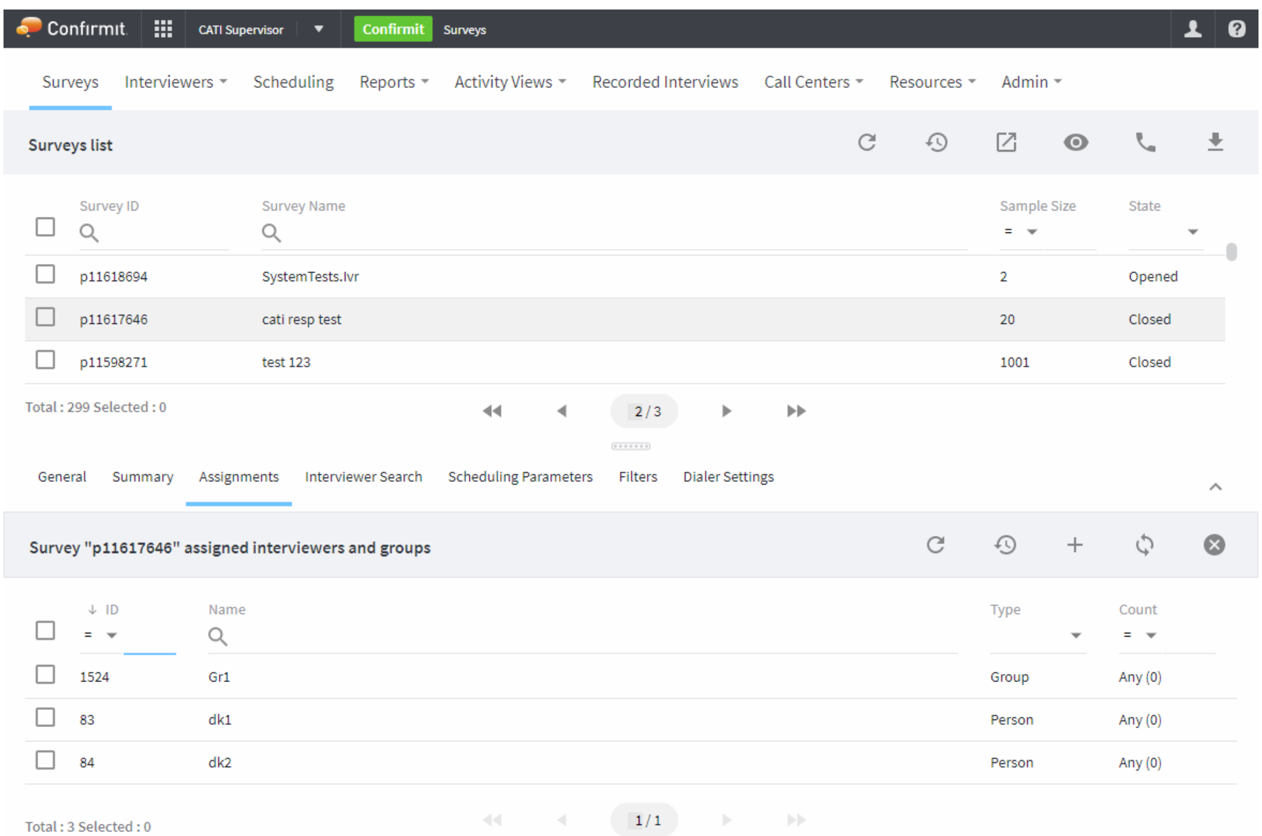


Figure 76 Survey properties - Assignments tab

Already 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 amount 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.

   This will display a modal window which can be used to assign new persons/groups to the current survey.

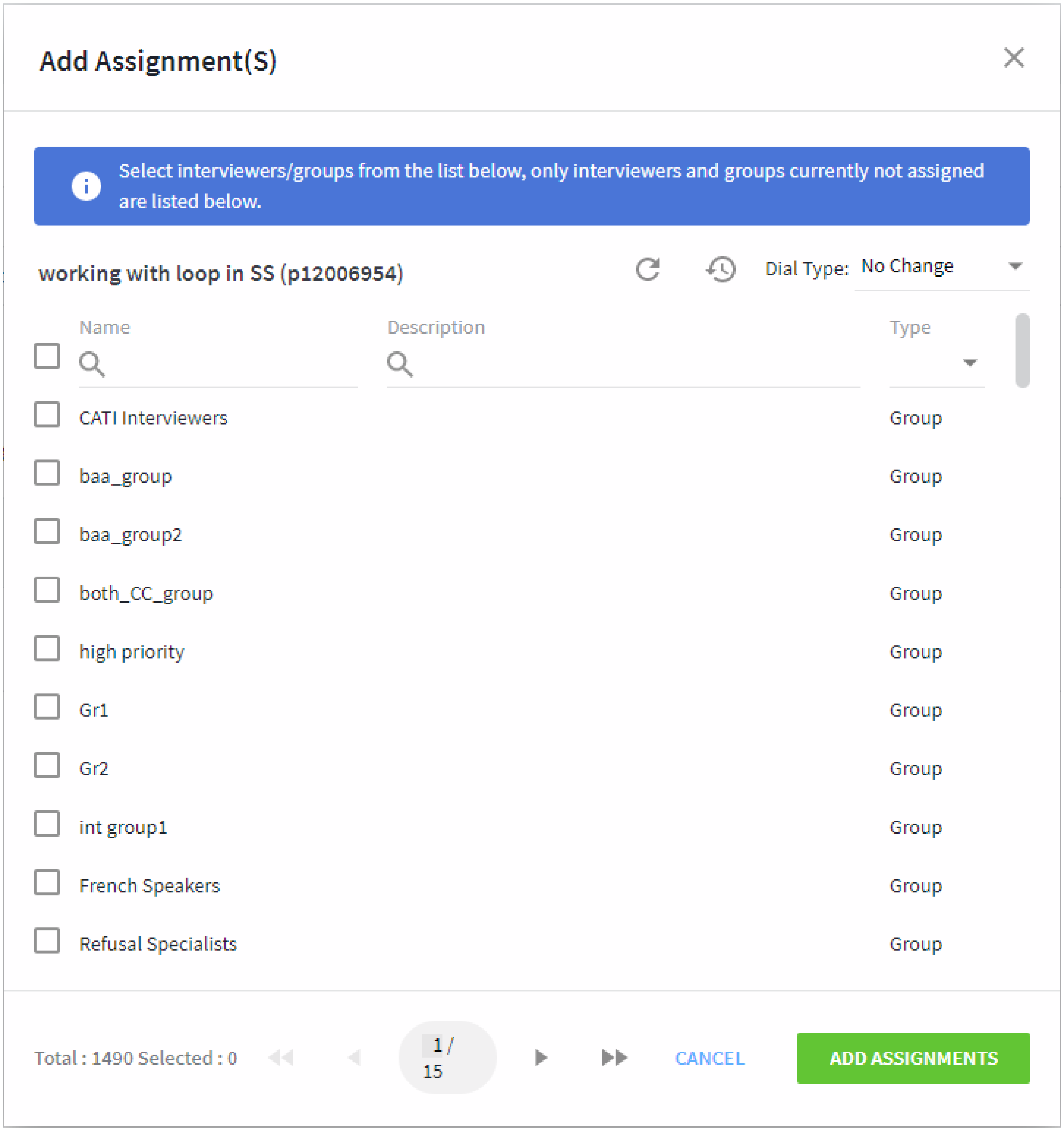


Figure 77 Assign to survey dialog window

This window contains a list of persons/groups that are available for assigning to the survey. The table displays person/group descriptions in a separate column, and also indicates whether this item represents a person, or a group.

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 **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).

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.

   This will display a dialog window which you can use to replace assignments.

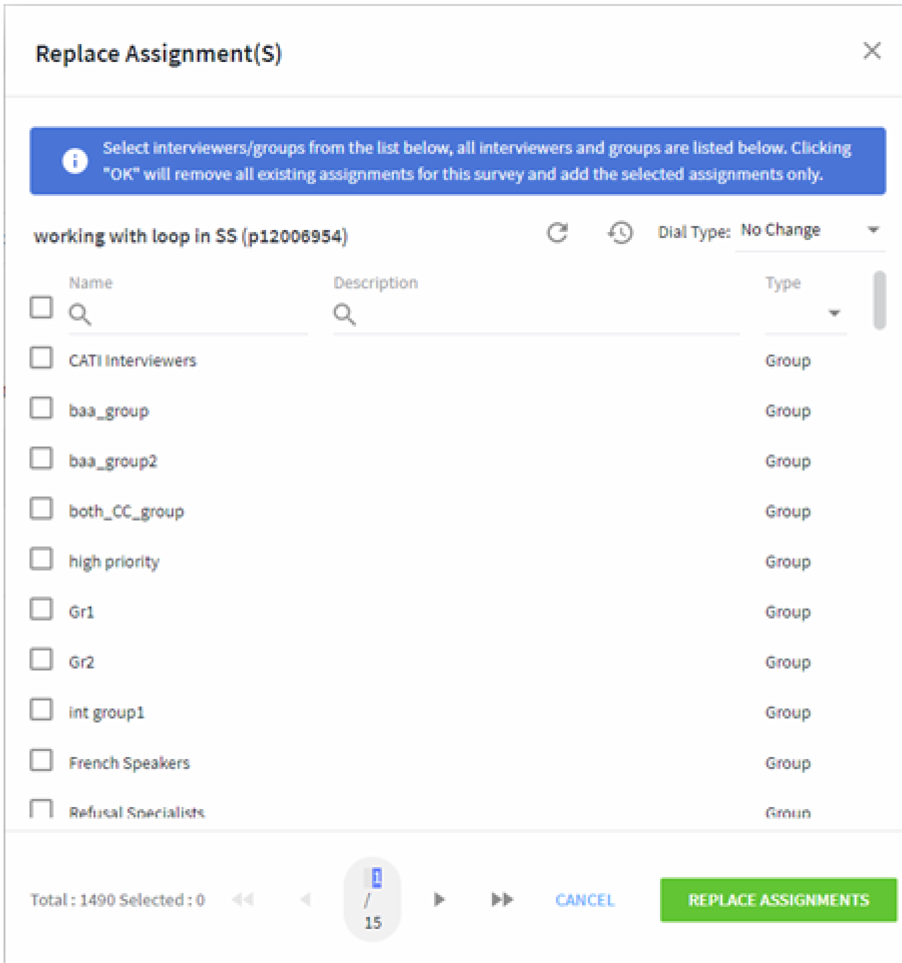


Figure 78 Replace survey assignments dialog window

   This window contains a complete list of all persons/groups that are available for assigning to the survey including 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.

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

   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. The specified assignment completely replaces the currently existing one. 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 188 for more information).

3.3.4. Viewing and Modifying Survey Quota Settings

Quotas are specified and enabled for use with the CATI surveys in the Confirmit Authoring module, refer to Confirmit Authoring manual 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 limit for selected quota cell(s) (see (go to Changing Limit for Quota Cells on page 88 for more information));
- activating interviews/calls which fall into certain quota cells (see (go to Activating Interviews which Fall into Specific Quota Cells on page 89 for more information));
- changing call priority for interviews/calls which fall into certain quota cells (see (go to Changing Priority of Calls which Fall into Specific Quota Cells on page 90 for more information));
- enabling interviews/calls which fall into certain quota cells (see (go to Enabling Calls which Fall into Specific Quota Cells on page 90 for more information));
- disabling interviews/calls which fall into certain quota cells (see (go to Disabling Calls which Fall into Specific Quota Cells on page 91 for more information));
- open/close quota cells (see (go to Opening and Closing Quota Cells on page 92 for more information))
- set up Balancing Priority for quota cells (see (go to Setting up a Balancing Priority for Quota Cells on page 94 for more information)).

For description of the Activate, Disable and Enable actions refer to (go to Activating an Interview/call on page 149 for more information) and (go to Disabling and Enabling Calls on page 135 for more information). These actions are applied only to interviews/calls falling into certain 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 (see (go to Setting Up the Action Filter on page 94 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 - see (go to Quota Balancing on page 97 for more information) for details.

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, which contains details of the required survey, and choose View from the shortcut menu, or select a survey row and click the View button in the top frame toolbar.

   This will display the survey properties in the bottom frame.

   Change to the **Quotas** tab.

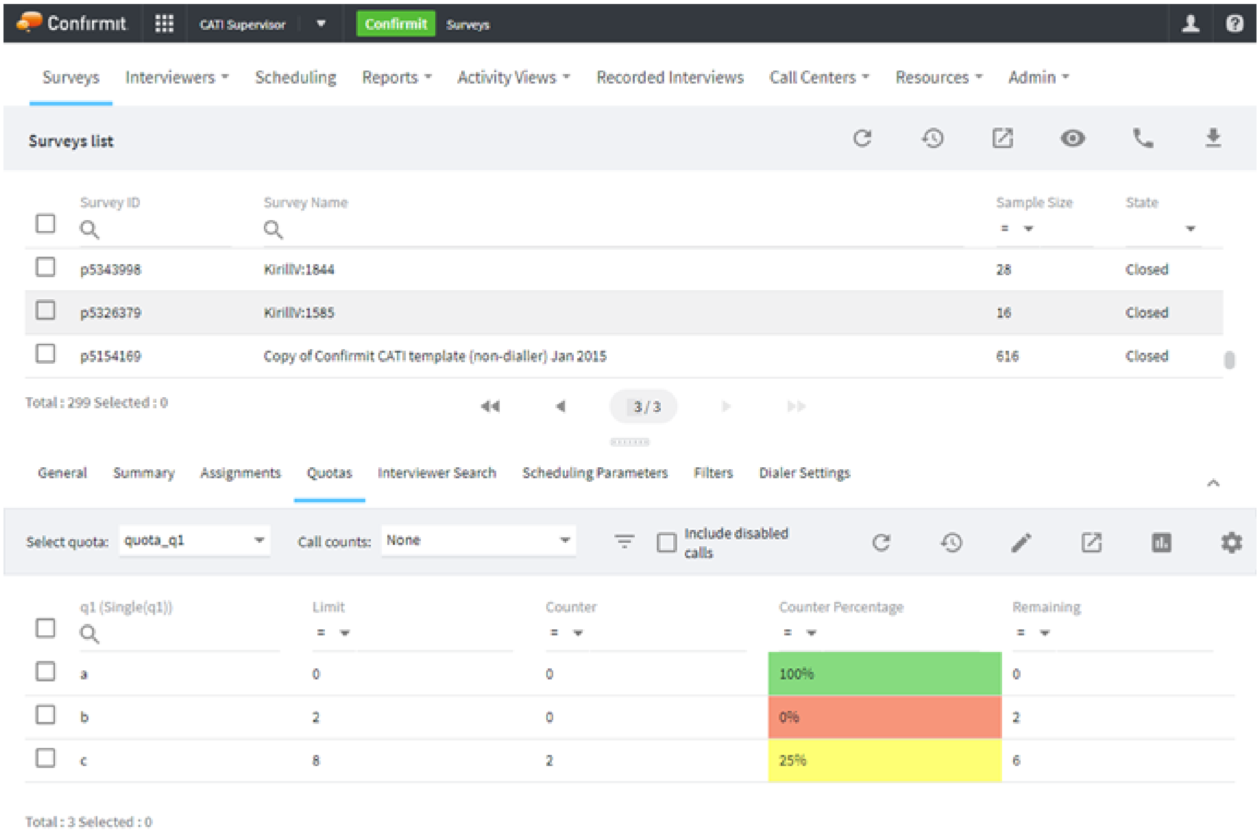


Figure 79 Survey properties - Quotas tab

3. To view the particular quota settings first select the required quota from the Select quota drop-down list above the quota list. When the quota is selected, 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 amount of calls which should not be exceeded),
- **Counter** (the current amount of completed calls for this target),
- **Counter Percentage** (the current level of achieved quota, expressed as a percentage)
- **Remaining** (the amount of calls which can still be made for this target),
- **In Progress** (the amount 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 Confirmit 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 Confirmit Authoring module)
- Also there is an option of displaying an extra column which is called "**Call counts**" (see (go to The Call counts column on page 84 for more information)).
- The user can set up **Balancing Priority** for quota cells (see (go to Setting up a Balancing Priority for Quota Cells on page 94 for more information)).

4. It is possible to display quota information and settings in a separate window. This is a convenient way to compare different quotas (for the same or different surveys), for example whilst one quota is displayed in the right bottom frame another one may be displayed in a separate window which you can maximize or move into a preferred position on the screen.

   To open a particular quota view in a separate window, first select the required quota using the Select Quota drop down list in the bottom right frame and, when the quota information is displayed, click the Open selected quota in a new window button . This will open the selected quota settings in a separate window which UI is almost similar to that of the Quotas tab (see the picture below for illustration).

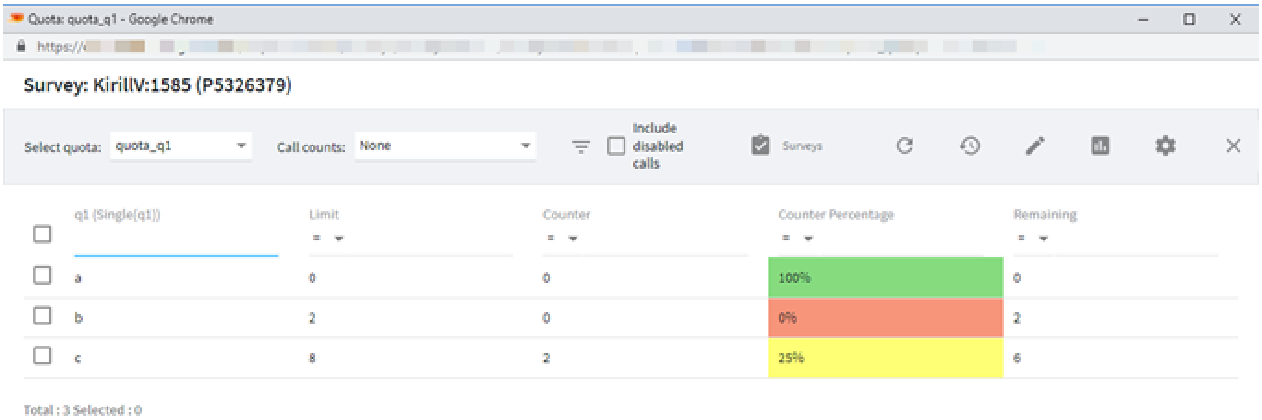
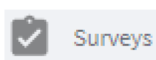


Figure 80 Quota opened in a separate window

This allows you to display settings for another quota in the bottom right frame and compare them.

The Surveys button 

allows the user to switch focus to quotas of a different survey.

The Select Survey dialog

Click the **Select Survey** button. This opens the Select Survey dialog. This dialog is used to select another survey which is then used to choose a quota to be displayed.

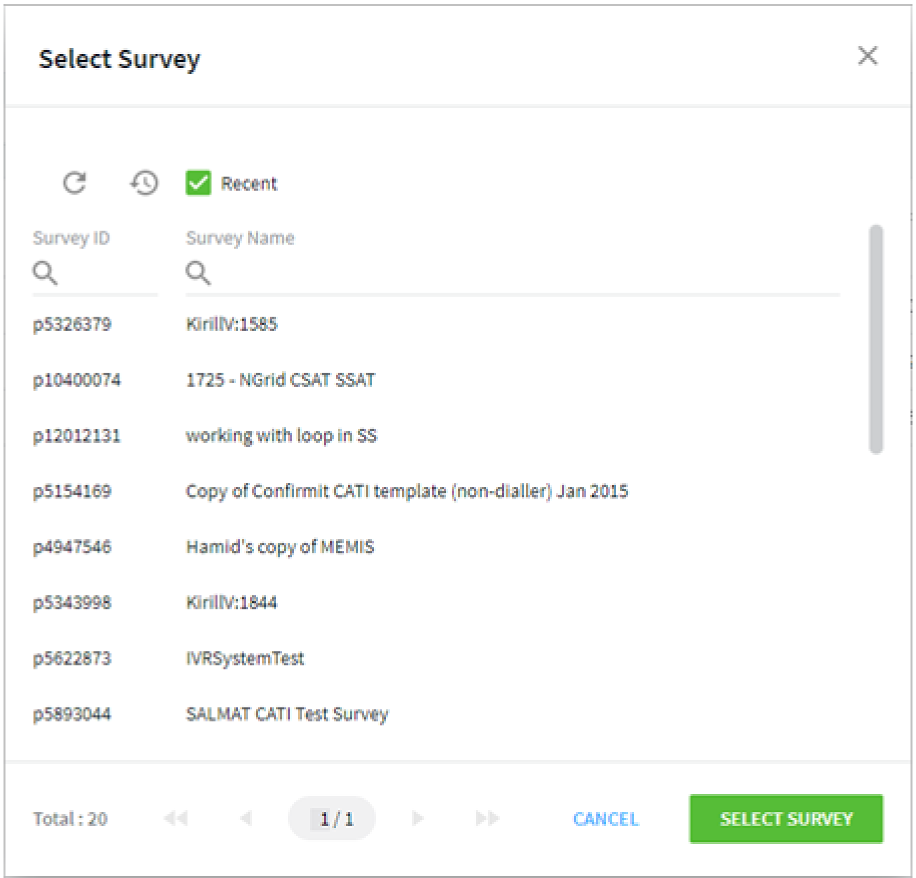


Figure 81 Selecting a survey in the Select survey window

To make the process of selecting a survey more convenient the system only lists "recent" surveys by default - these are the surveys which contain interviews that had their extended status changed recently. When the Recent box is checked, a maximum of twenty such interviews is shown, while other surveys are hidden. When the Recent box is cleared, all surveys are revealed.

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: Daily Achieved Counters, Scheduled Calls, Scheduled Calls with Specific Statuses, Interviews with Specific Statuses. There is also an option for hiding the Call counts column - it is called None.

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.

Disabled interviews/calls are not included in the Call Counts by default. Whenever counted calls include disabled calls you can consider turning on the additional filtering condition that will add the disabled calls to the count. Do this 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 this option is not checked, and disabled calls are not counted.

By default the Call counts column is hidden, and the Call counts drop-down box displays the None option chosen. To reveal the column you should choose one of the available filters in the Call counts drop-down box. In case the chosen counter filter and additional options are not applied automatically (the Quotas grid does not refresh after you change any of these) you should click the Refresh button on the Quotas tab toolbar to update the frame. After the frame is updated the grid in this frame displays an extra column called "Call counts".

You may also need to refresh the frame manually by pressing the Refresh button when you change the filter and/or any additional filtering option and the grid does not refresh.

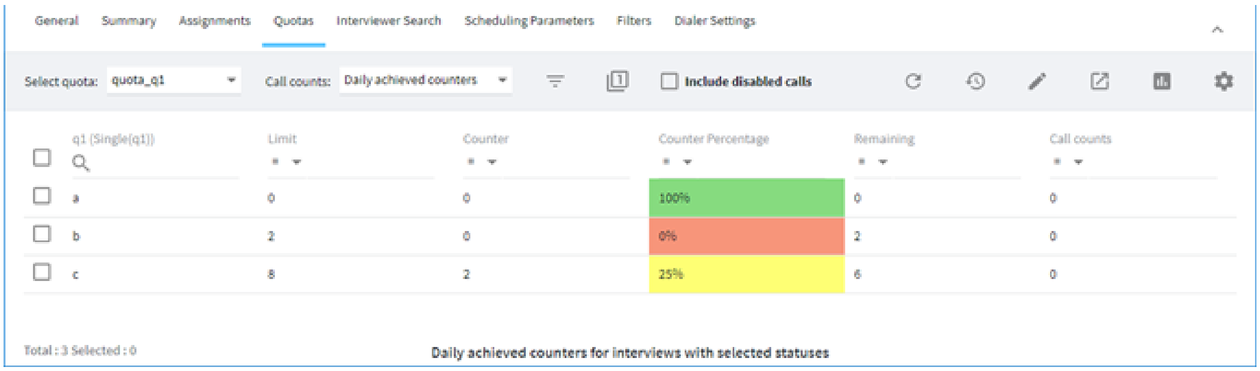


Figure 82 Quotas tab displaying the Call counts column

When the chosen filter assumes additional configuration by selecting the specific statuses, you should click the Select Statuses button (this button is displayed when either Scheduled Calls with Specific Statuses, or Interviews with Specific Statuses filter is chosen in the Call counts drop-down list), and then check the appropriate statuses in the scrollable list (appears when the Select statuses button is pressed). This situation is illustrated in the picture below.

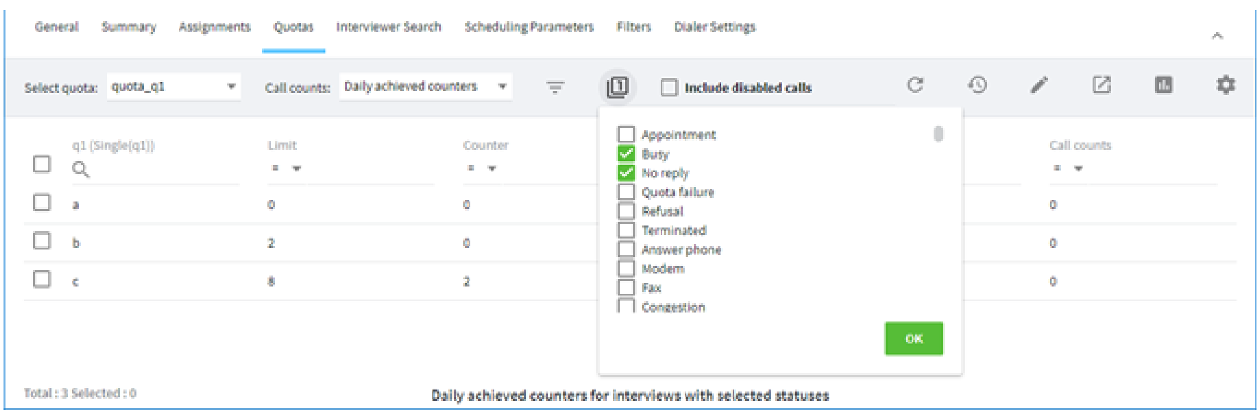


Figure 83 Selecting statuses to configure the filter for the Call counts counter

When all the required statuses are selected, click OK below the scrollable list to apply the filter condition. Again, when the grid is not refreshed automatically you should click the Refresh button on the tab toolbar 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 will show 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:

- on the left side - the total amount of quota cells defined for the selected quota, and the amount of currently selected quota cells;
- on the right side - the total amount of interviews/calls matching the criteria chosen for the Call counts column.

  To hide the Call counts column you should choose the None option in the Call counts drop-down box and click the Refresh button.

You can display all currently defined quotas in a single view. You can choose to display this view also when quotas are shown in a separate window (see Step 4 of this instruction for details on how to display quotas in a separate window).

Displaying all quotas in a single view on the Quotas tab

To display all quotas in a single view choose the "All quotas" option from the Select quota drop-down list. The illustration below shows three quotas displayed simultaneously on the Quotas tab.

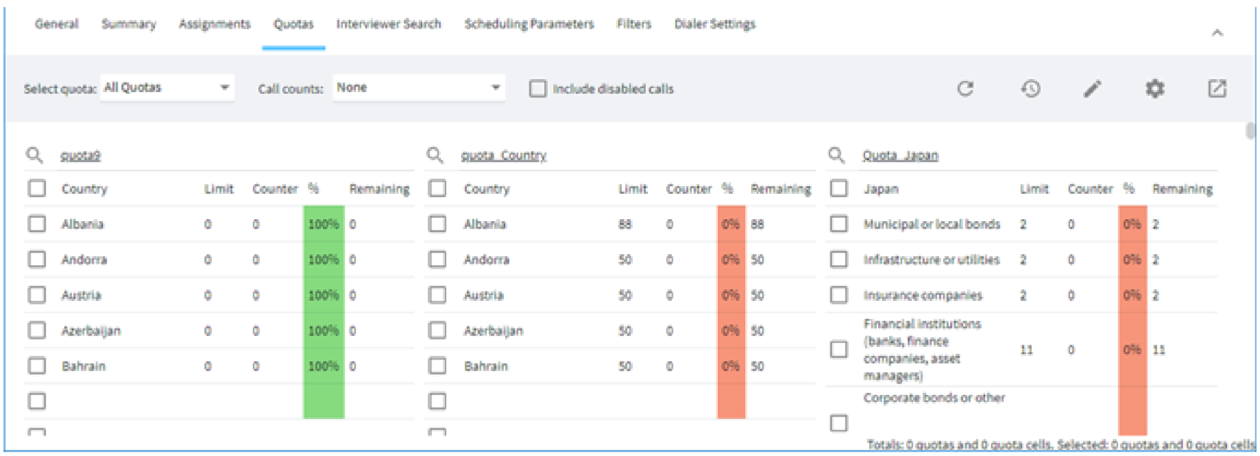


Figure 84 All quotas displayed in a single view on the Quotas tab

When the "All quotas" view is enabled, quotas are displayed in blocks which are placed in the way specified in the Properties dialog (see description in the next step).

The Properties button  on the Quotas tab toolbar opens the Properties dialog window which provides controls that let you configure how quotas are displayed in the Quotas tab (see the picture below).

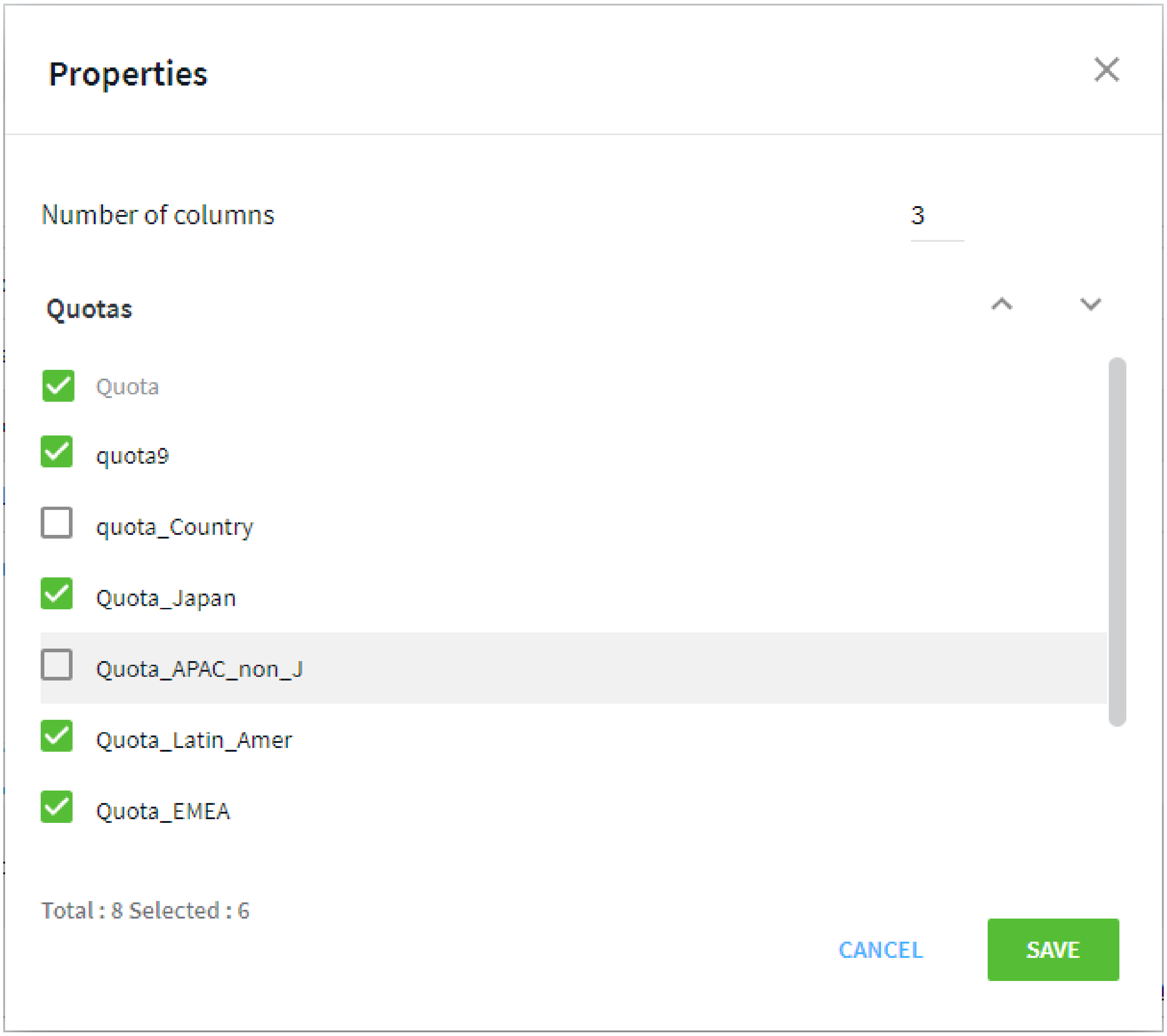


Figure 85 The Properties dialog window for the Quotas tab

Using the check box next to the quota name you can either hide or reveal the corresponding quota data in the quota view. When the box is checked it means that the quota will be visible in the Quotas tab. Otherwise (with the box cleared) the quota will not be visible at all. Click the Reset button to undo the check/clear action(s) you performed before pressing the Save button or changing another setting.

The Properties dialog allows specifying order in which quotas are displayed in the Quotas tab. To understand how it works see the next paragraph which explains the "Number of columns" setting.

To adjust the "Number of columns" setting please type a figure in this field. This number 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. The number of rows shown depends on the number of quotas marked as visible in the Properties dialog box. For example, you mark 6 quotas as visible, and you enter 3 in the Number of columns field. Then you save these settings by pressing the Save button in the Properties tab. Now, when you choose the "All quotas" view from the Select quota drop-down list, the selected quotas will be displayed in 3 columns and in 2 rows (6 quotas divided by 3 columns) - see (go to All quotas displayed in a single view on the Quotas tab on page 86 for more information) for illustration. The illustration above shows only the first row (including 3 quotas) - the second row and the next three quotas can be displayed when the frame contents is scrolled (the scrollbar on the right is visible).

You can 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.

- At any time you can 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 certain value range. Digits are displayed followed by the percent sign. The following colors are used: Red for values falling into the range of 0 to 10%, Yellow for values falling into the range of 11% and up to 90%, 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 at any moment of time (the value in the Limit column equals zero) then any amount 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 upon editing.

3.3.4.1. Changing Limit for Quota Cells

You can change limit for any selected quota cell, or for a number of quota cells belonging to a single or different 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. Next right-click the selection and choose Change Limit from the context menu that appears. Or you can click the Change limit button in the frame toolbar.
3. Any of these actions will display the Change Limit dialog window.

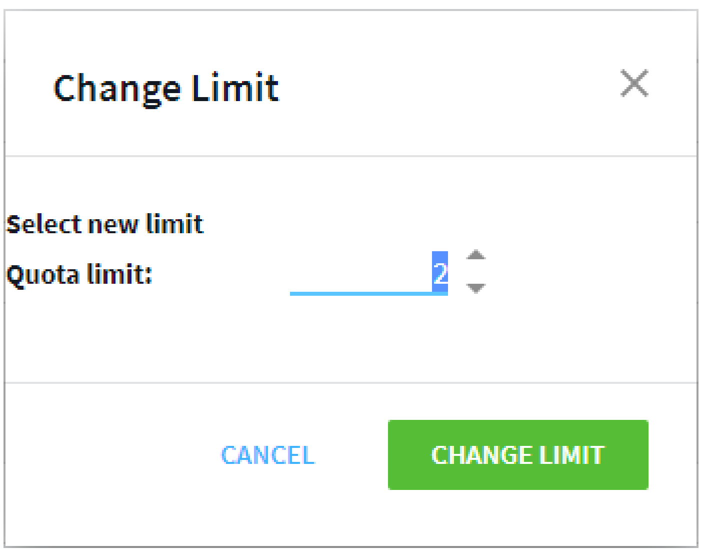


Figure 86 Changing limit for a quota target

Type the new value in the **Quota limit** field, or use the spin control to change the displayed value. Click **Change limit** to confirm the new limit value. The dialog window will close and the tab will be refreshed. The new limit value will be set for all selected quota cells.

3.3.4.2. Activating Interviews which Fall into Specific Quota Cells

Refer to (go to Activating an Interview/call on page 149 for more information) for detailed description and instructions regarding setting up the Activate action.

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 (see (go to Setting Up the Action Filter on page 94 for more information) for instructions).

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.

   This will display the Activate modal window.

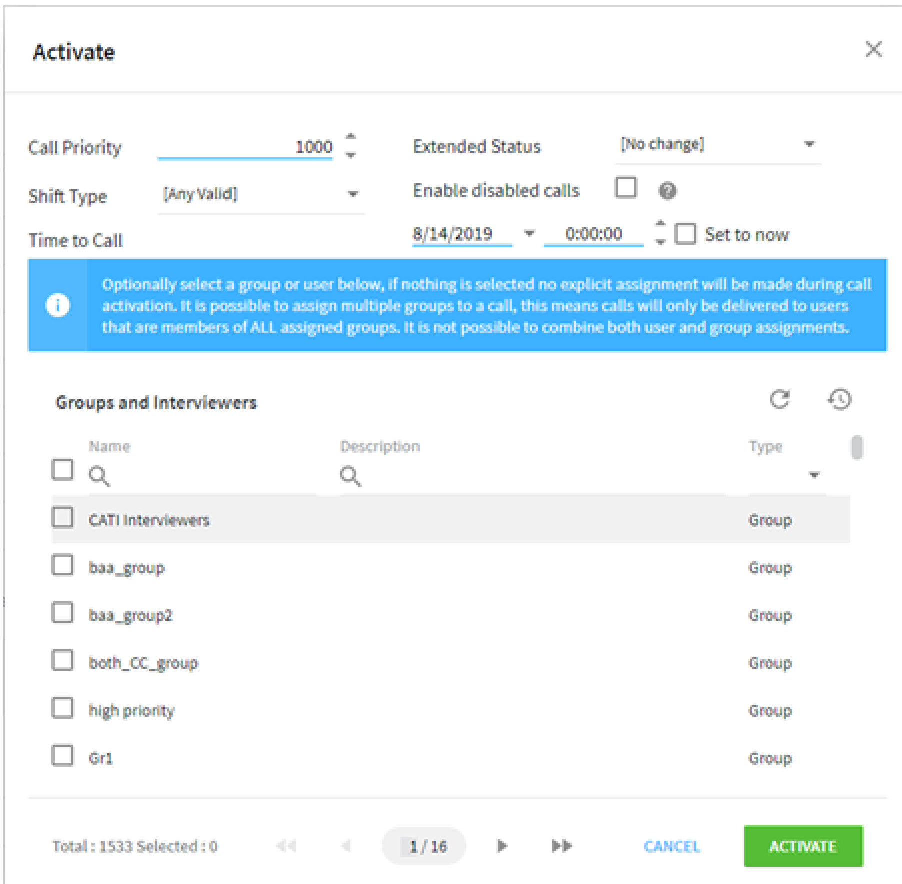


Figure 87 The Activate modal window

Refer to (go to Activating an Interview/call on page 149 for more information) for instructions on how to set up the Activate action.

Note that an extra interview/call property check is performed as part of an activation procedure in case the quota controlled call delivery is turned on in Confirmit Authoring.

If a quota is defined and enabled for the survey in the Confirmit 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:

- For 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 such case this call remains in the "Not scheduled" list.

  Note that all 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 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 once they are enabled.

The Activate modal window 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 therefore become available for delivery to the interviewers. By default this option is NOT enabled.

4. Follow the instructions contained in (go to Activating an Interview/call on page 149 for more information) to complete the procedure.

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

Refer to ChangingACallPriority.htm for detailed description of the Change priority of calls action.

When it is run from the Quotas tab, the Change priority action changes the priority value of all interviews which fall into the selected quota cells taking into account the Action filter settings (see (go to Setting Up the Action Filter on page 94 for more information) for instructions).

1. Display the Quotas tab in the bottom frame.
2. Select 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. This will display the Change priority modal window.

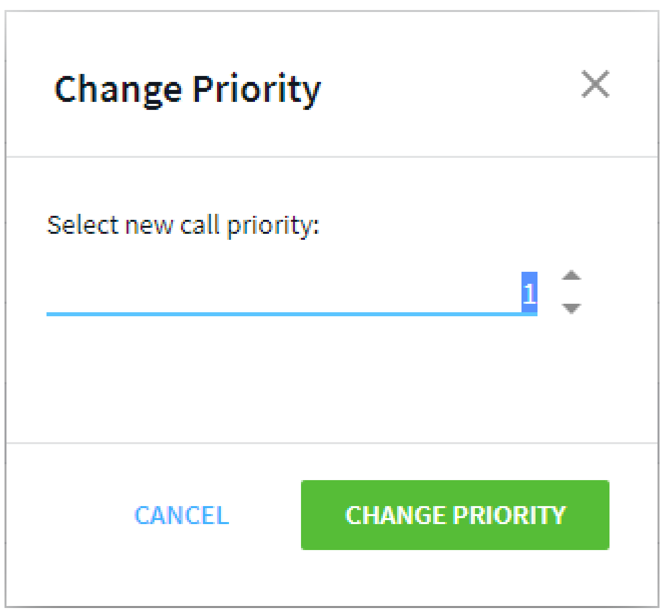


Figure 88 Changing priority of calls falling into quota cell(s)

3. Refer to (go to Changing a Call Priority on page 155 for more information) for instructions on how to set up the Change priority action.

3.3.4.4. *Enabling Calls which Fall into Specific Quota Cells*

Disabled calls that fall into certain quota cells can be enabled.

Refer to (go to Disabling and Enabling Calls on page 135 for more information) for more details on the Enable action.

When it is run from the Quotas tab, the Enable action enables all interviews/calls which fall into the selected quota cells taking into account the Action filter settings (see (go to Setting Up the Action Filter on page 94 for more information) for instructions).

1. Display the Quotas tab in the bottom right frame (see (go to To view and modify survey quota settings: on page 81 for more information) for instructions).
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 that appears. Click OK in the confirmation message to proceed.
3. The Enable calls in selected quota cells modal window is displayed then.

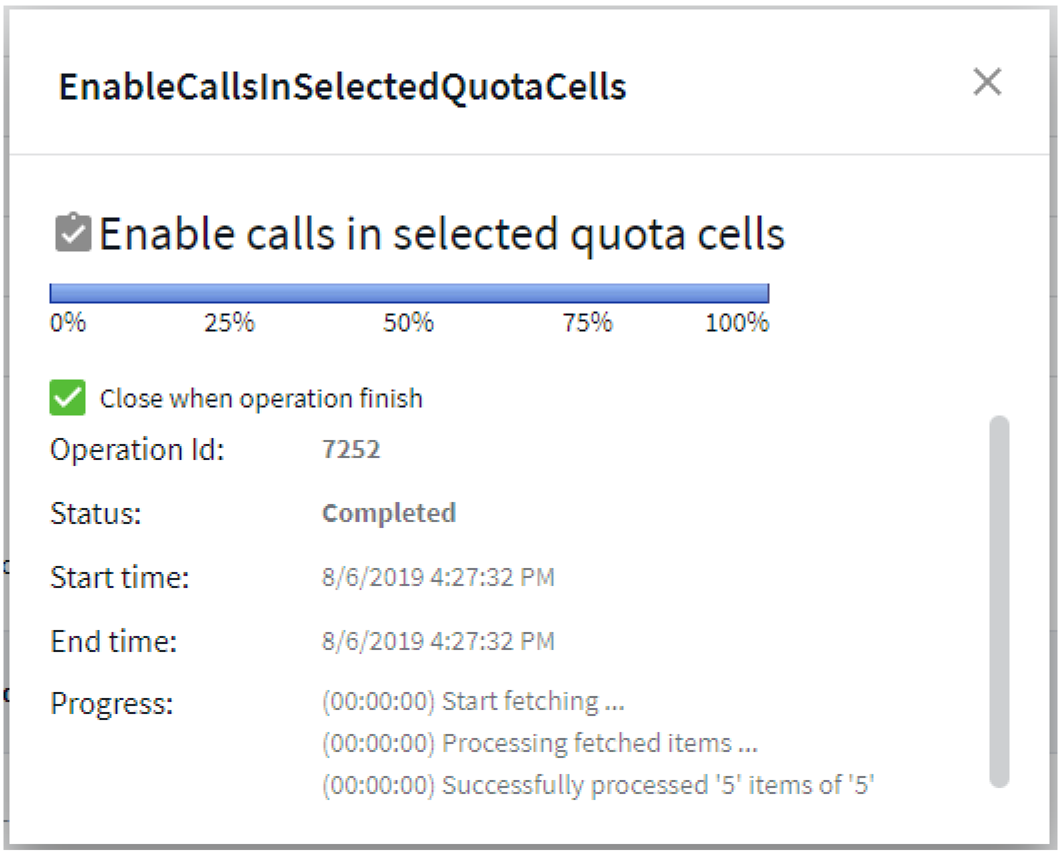


Figure 89 Enabling calls in selected quota cells

The modal window shown above 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 its interface.

4. When this operation is run from the Quotas tab, the Enable Calls action enables all interviews which fall into the selected quota cells taking into account the Action filter settings (see (go to Setting Up the Action Filter on page 94 for more information) for instructions).
5. Check the outcome of the Enable Calls operation - it is indicated in the Progress field. In case of the partial, or unsuccessful outcome follow the instructions contained in (go to Activating an Interview/call on page 149 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.

Refer to (go to Disabling and Enabling Calls on page 135 for more information) for more details on the Disable action.

When it is run from the Quotas tab, the Disable Calls action disables all interviews which fall into the selected quota cells taking into account the Action filter settings (see (go to Setting Up the Action Filter on page 94 for more information) for instructions).

1. Display the Quotas tab in the bottom right frame (see (go to Viewing and Modifying Survey Quota Settings on page 81 for more information) for instructions).
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. Click OK in the confirmation message to proceed.
3. The Disable calls in selected quota cells dialog box is displayed then.

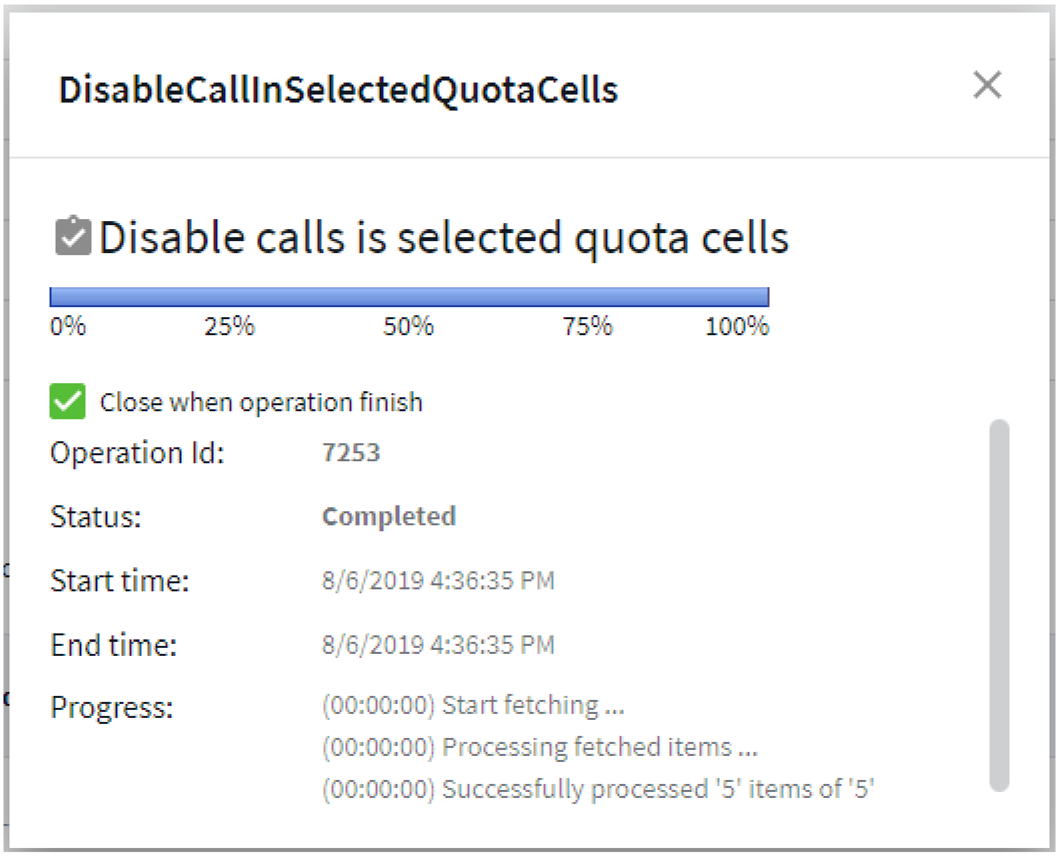


Figure 90 Disabling selected calls falling into quota cell(s)

The dialog box shown above is similar to that used with the regular Activate, Enable and Disable operations. It shows the action summary and progress details. Refer to (go to Activating an Interview/call on page 149 for more information) for description of this dialog box.

4. 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 (see (go to Setting Up the Action Filter on page 94 for more information) for instructions).
5. Check the outcome of the Disable Calls operation - it is indicated in the Progress field. In case of partial, or unsuccessful outcome follow the instructions contained in (go to Activating an Interview/call on page 149 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 Confirmit 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.

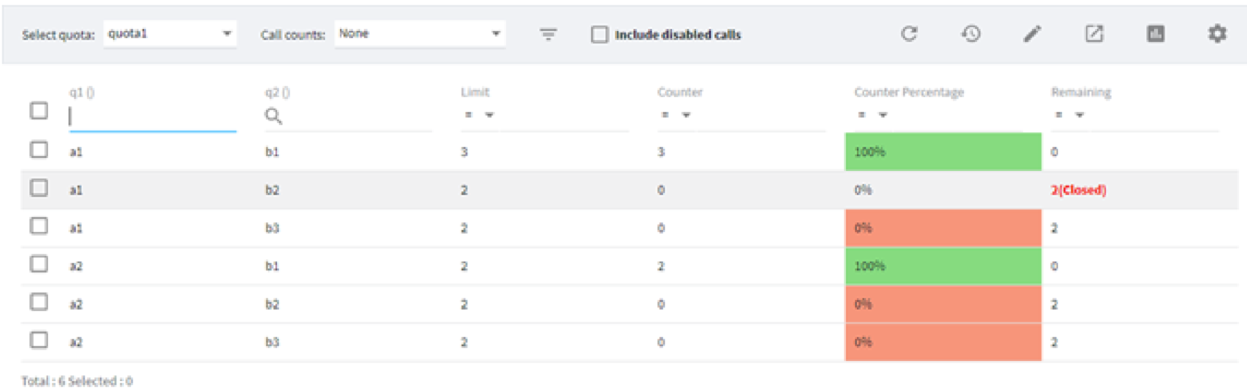


Figure 91 Closed quota cell with remaining calls (value highlighted in red)

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 were 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 would be added to that cell in the future.

Note that to use the Open/Close quota cells feature the corresponding quota handling behavior should be chosen. This is done by a System Administrator on the Settings tab (in the Admin menu) (go to General Settings Group on page 461 for more information). The "Call filtering behaviour for filled quotas" option is used to that end.

To close a quota cell (or multiple quota cells)

1. Select one or a number of quota cells in the Quotas tab. Right-click the selection and choose "Close cells" from the context menu that appears.
2. The frame is refreshed and the "Remaining" value for the selected quota cell(s) is highlighted in red and the "Closed" mark 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 a number of quota cells in the Quotas tab. Right-click the selection and choose "Open cells" from the context menu that appears.
2. The frame is refreshed and the red highlighting is removed from the "Remaining" value for the selected quota cell(s) and the "Closed" mark next to it is also removed.

3.3.4.7. Setting up a Balancing Priority for Quota Cells

When quota balancing is enabled for a survey (see (go to Quota Balancing on page 97 for more information)), the supervisor can apply a balancing priority to distribute promoted calls among quota cells: it can be **No Balancing**, **Low**, **Medium** or **High**. This should not be mixed with the "Priority" parameter which is set up when quota balancing feature is enabled for a survey (see (go to Quota Balancing on page 97 for more information)). 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 chosen quota cells, or even exclude a quota cell from balancing. When the supervisor sets the Balancing Priority for some 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. Similar change occurs when the **"Low"** Balancing Priority is set for a quota cell. Only this time the limit value used to calculate the amount of calls promoted to this cell is decreased - it is divided by 1,5. The **"Medium"** Balancing Priority keeps the amount 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. Make sure that quota balancing feature is turned on for the survey (see (go to Quota Balancing on page 97 for more information)).
2. When quota balancing is enabled for a survey an additional column is displayed in the Quota list on the Quotas tab. It is called "Balancing Priority" (the rightmost column in the grid - see the illustration below).

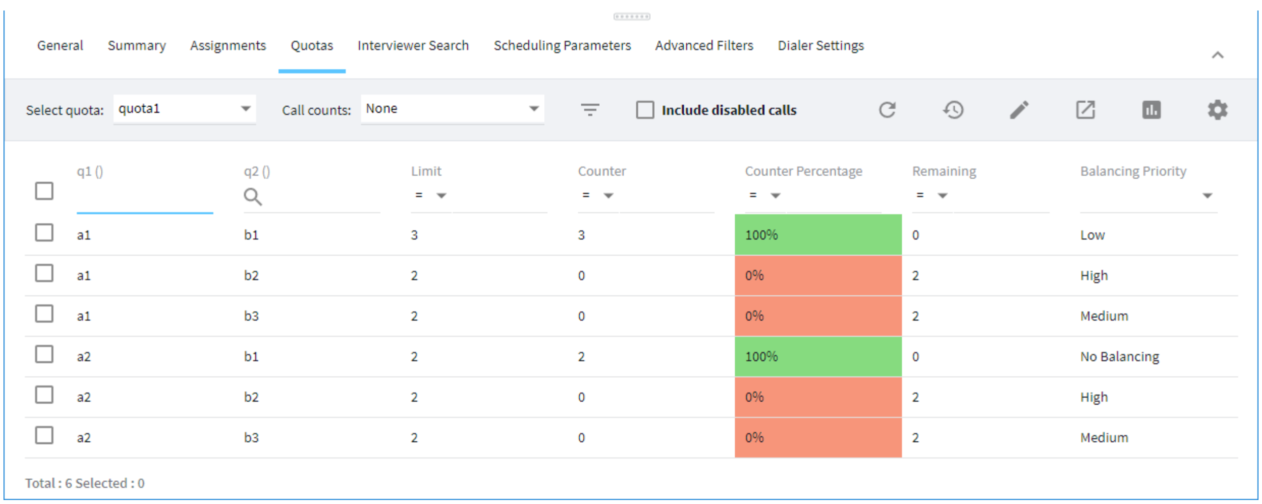


Figure 92

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

   To change the priority value you should right-click the required quota and choose the Balancing Priority command from the shortcut menu that appears. In the drop-out menu then choose the value that suits your needs: Low, High, Medium or No Balancing.
4. The quota list refreshes and you see the selected balancing priority value in the Balancing Priority column.

   Repeat the 3rd step for each quota to which you want to apply the Balancing Priority rate.

3.3.4.8. Setting Up the Action Filter

Setting up the Action filter

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

Action filter is set up separately for each quota.

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

Here is an example of how the Action filter works.

Let us say, 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 all the rest interviews/calls.

To set up an Action filter do the following.

1. Display the Quotas tab in the bottom frame (see (go to To view and modify survey quota settings: on page 81 for more information) for instructions).
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  next to the **Call counts** drop-down list. A form similar to the one shown below will unfold below the button.

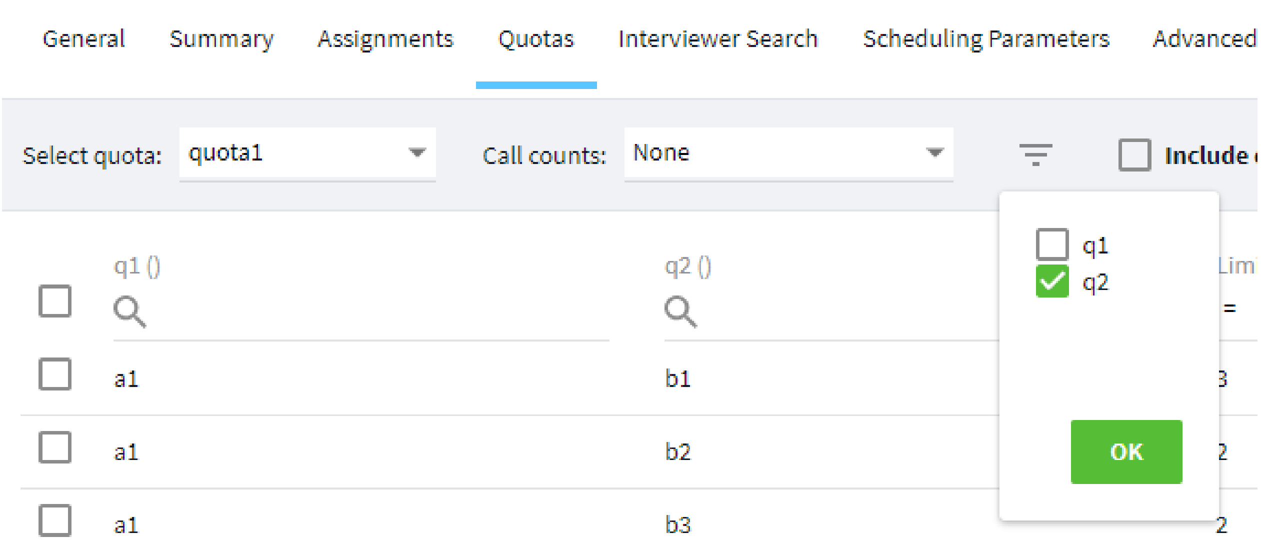


Figure 93 Action filter setup

This form will contain the list of questions contained in the currently selected quota.

4. Put a check in front of each question that you would like to act as a filter.
5. Click OK in the Action filter form. The action filter is now configured.

   The configured Action 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 to set up an action filter for another quota.

3.3.4.9. *Viewing the Extended Status Breakdown Information for Quota Cells*

At any time you can watch how many interviews/calls actually fit each cell and what their extended statuses are.

This information is available only when a certain "Call Counts" filter is applied, and the Call Counts column is displayed in the grid on the Quotas tab (see (go to To view and modify survey quota settings: on page 81 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 (see (go to To view and modify survey quota settings: on page 81 for more information) for instructions).
2. Choose the desired quota from the Select Quota drop-down list. The grid in the tab will list 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 additionally configure this filter (if applicable - see (go to To view and modify survey quota settings: on page 81 for more information)).

   Check the total amount of interviews that match the selected Call Count filter - this is the amount shown in the Call Counts column for each quota cell. Note that the Status Breakdown dialog window will list the matching total amount of interviews/calls. See the note above - it explains which calls are included in the Call Count.
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. This will display the Status Breakdown dialog window.

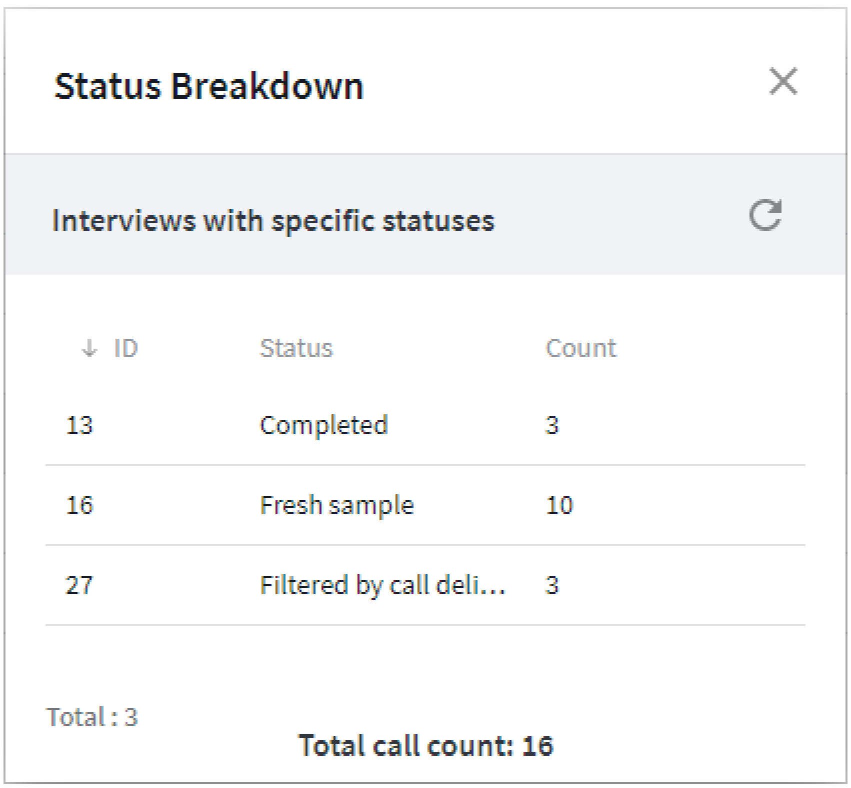


Figure 94 Viewing the Status Breakdown information for a quota cell

The grid in the dialog box contains a list of interviews/calls that fit the selected quota cell. The list is broken down by extended statuses - one extended status per row. Each row shows the following information:

- Extended Status ID;

- Extended Status name;
- Count of interviews/calls with this status.

  The information bar below the grid shows the total amount of detected extended statuses, and the total count of calls with these statuses.

5. You can update the list periodically by pressing the Refresh button  above the grid.
6. Click the Close button to close the dialog window.

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.

This 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.
3. This will display the Call management dialog window. Change to the All view using the corresponding drop-down control in this window. The All view will contain 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 also generate the Quota Progress Report (see (go to Generating the Quota Progress Report on page 430 for more information) for description of the report) from the Quotas tab. 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, 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. Quotas are specified and enabled for use with the CATI surveys in the Confirmit Authoring module, refer to Confirmit Authoring manual for quota definition description and instructions on how to set up quota definitions. Note that if specified quotas are not enabled for use with a CATI survey, they would not be available at all in the CATI Supervisor module (go to Viewing and Modifying Survey Quota Settings on page 81 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 72 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 94 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 99 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 100 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 71 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 72 for more information).

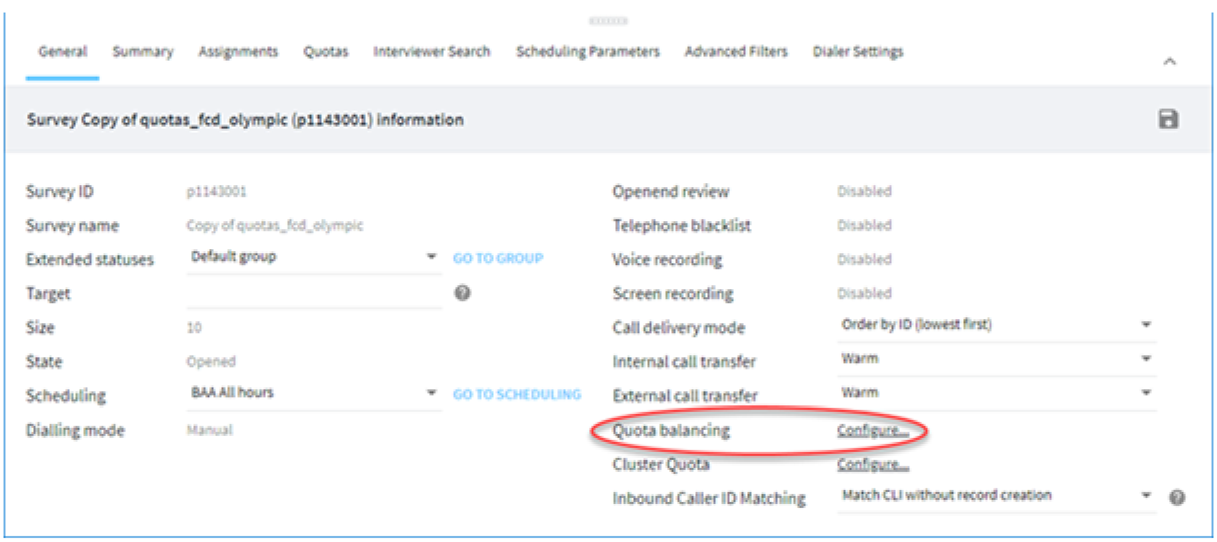


Figure 95 Choosing the Configure link for the Quota Balancing option

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.

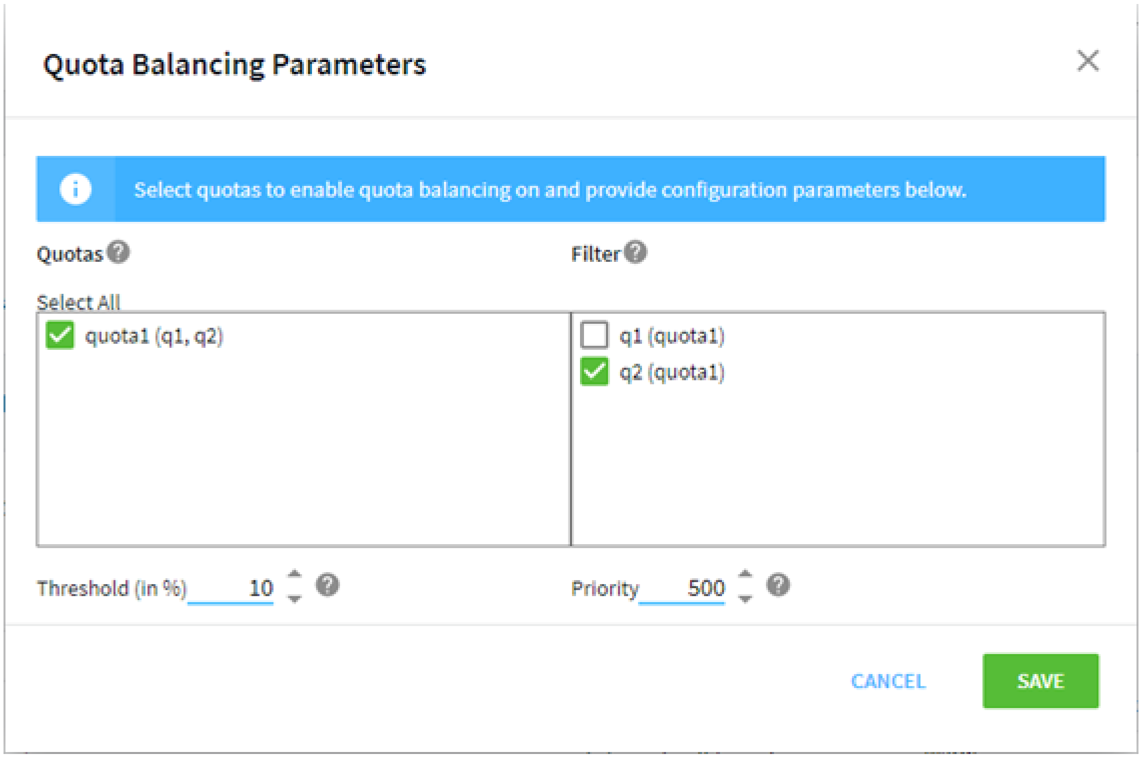


Figure 96 Specifying the Quota Balancing settings

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 81 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 window 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).

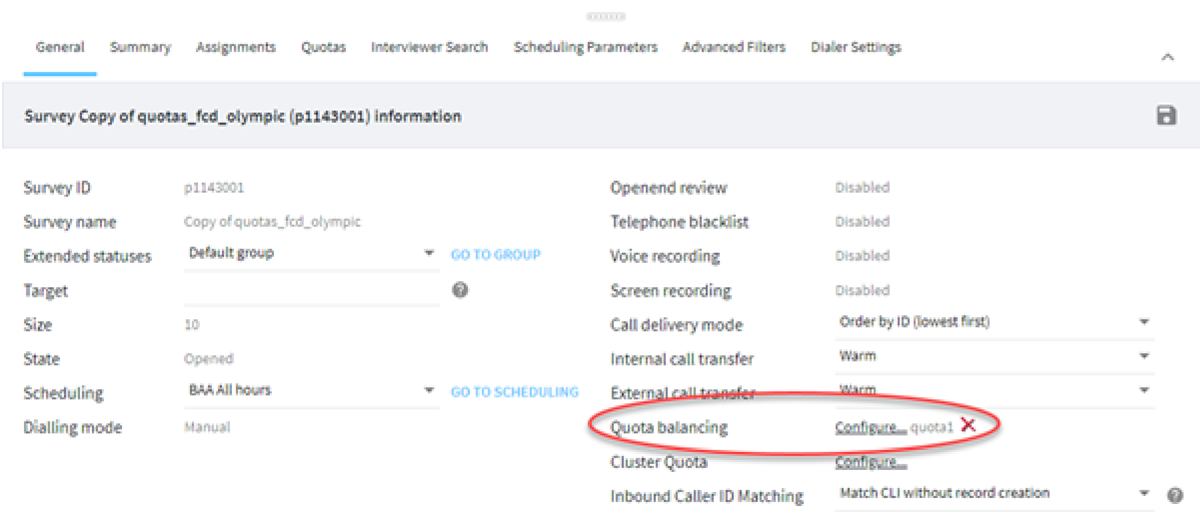


Figure 97 The General tab showing that Quota Balancing parameters are set

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 100 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 97 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 window. 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 69 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 window.

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

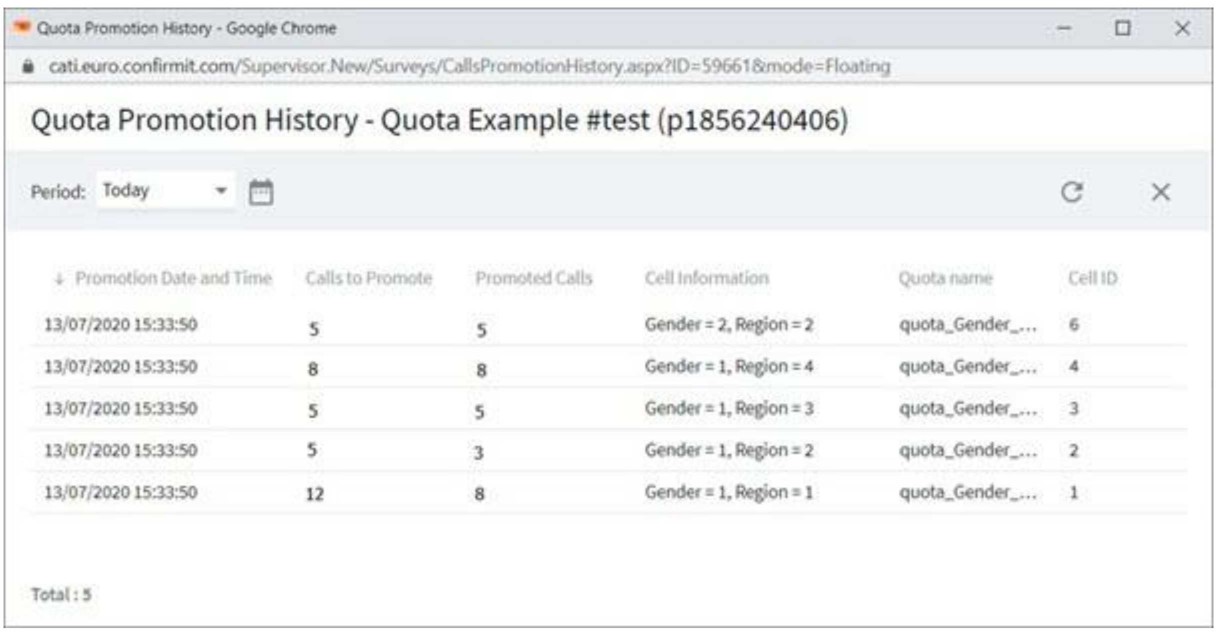


Figure 98 Viewing the quota promotion history

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 amount of calls that were planned for promotion to the particular quota cell (forecast calculated by the system).

oPromoted Calls - actual amount of calls promoted to the particular cell during the selected time period (ideally should equal the amount 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.

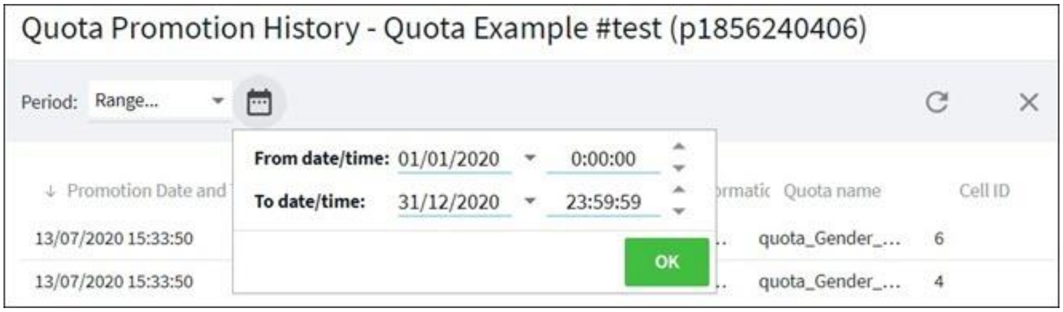


Figure 99 Choosing the time range for the quota promotion history

   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 window 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 amount 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 Confirmit Authoring are available for clustering (refer to the appropriate section in the Confirmit 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 263 for more information).

Note also that quota clustering cannot be enabled when predictive dialing mode is enabled (go to Dialer on page 359 for more information), or when call groups are used (go to Configuring the Call Groups on page 349 for more information).

To setup quota clustering:

1. Make sure the quota you want to apply the Quota Clustering setting to is enabled in Confirmit Authoring module. If it is not then such 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. Change to the General tab (see the picture below).

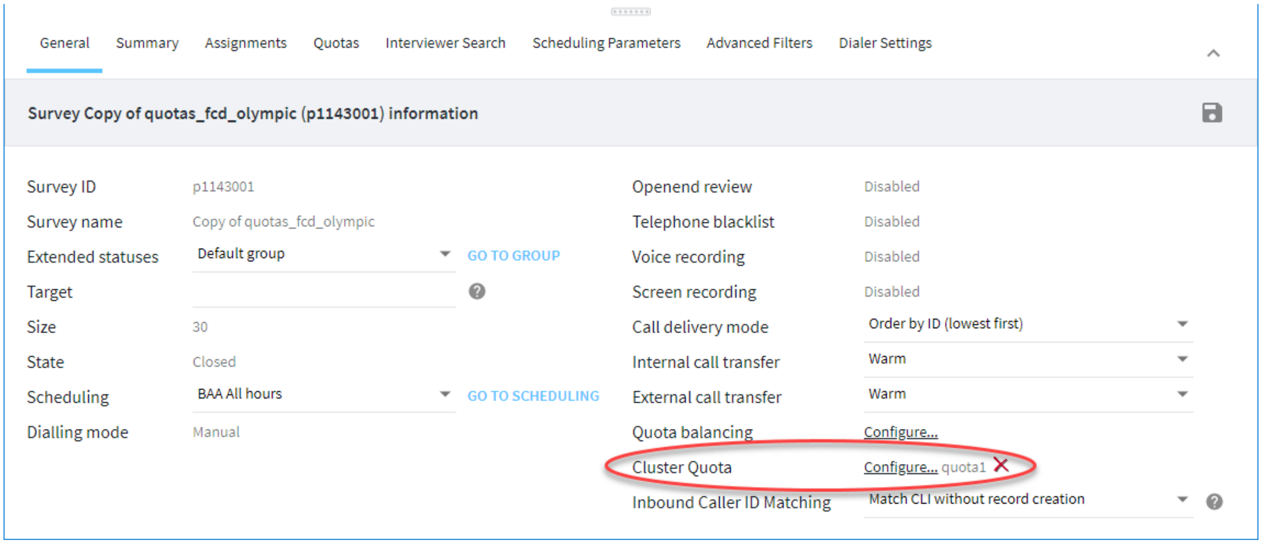


Figure 100 Quota clustering settings on the General tab in survey View mode

4. Check the Dialing mode - it should not be set neither to Predictive nor to Hybrid. Check if the Call Groups option is set to Disabled. Correct these settings if required.
5. Choose the Configure... link for Cluster Quota. The Quota Clustering Parameters window will open (see the picture below).

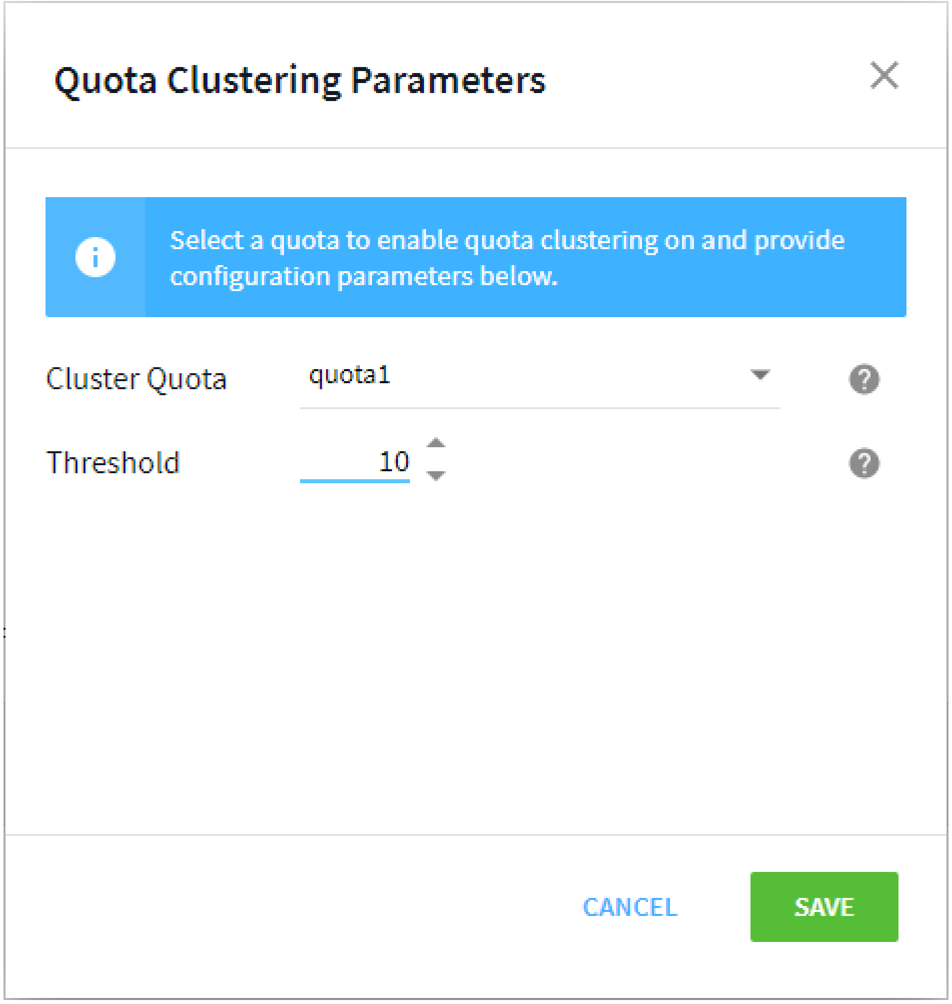


Figure 101 Configuring the Quota clustering parameters

6. Choose the quota to apply clustering settings to in the Cluster Quota drop-down list.
7. 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.
8. Click Save when you are done. The Cluster Quota will be displayed on the General tab (Survey View mode) next to the Configure... link (see (go to Quota clustering settings on the General tab in survey View mode on page 103 for more information)).
9. The red cross icon next to the Cluster Quota name allows resetting currently selected Cluster Quota. To set up a new Cluster Quota you have to repeat this procedure starting from Step 5 (see above).
10. Click the Save button in the upper right corner of the tab 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. Change to the General tab (see (go to Quota clustering settings on the General tab in survey View mode on page 103 for more information) picture above).
3. Choose the red cross icon next to the Configure... link and the name of the currently selected Cluster Quota. The quota name will disappear. 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 changes.

3.3.8. Quota Status Report Export

You can create a report containing complete list of details for all quotas which 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 (e.g. "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 required survey and choose “Quota Status Report Export” from the context menu that appears.
2. A modal window that opens explains what kind of information is included into Quota Status report. Click Generate Report button in this window to proceed.
3. On the next step you will have to 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 266 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 Confirmit Authoring, refer to the appropriate section in the Confirmit 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 266 for more information).

To add searchable questions to the interview

1. Mark all the required questions as "Available as CATI filter" in Confirmit Authoring (refer to the appropriate section in the Confirmit 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 72 for more information).
3. Change to the Interviewer Search tab.

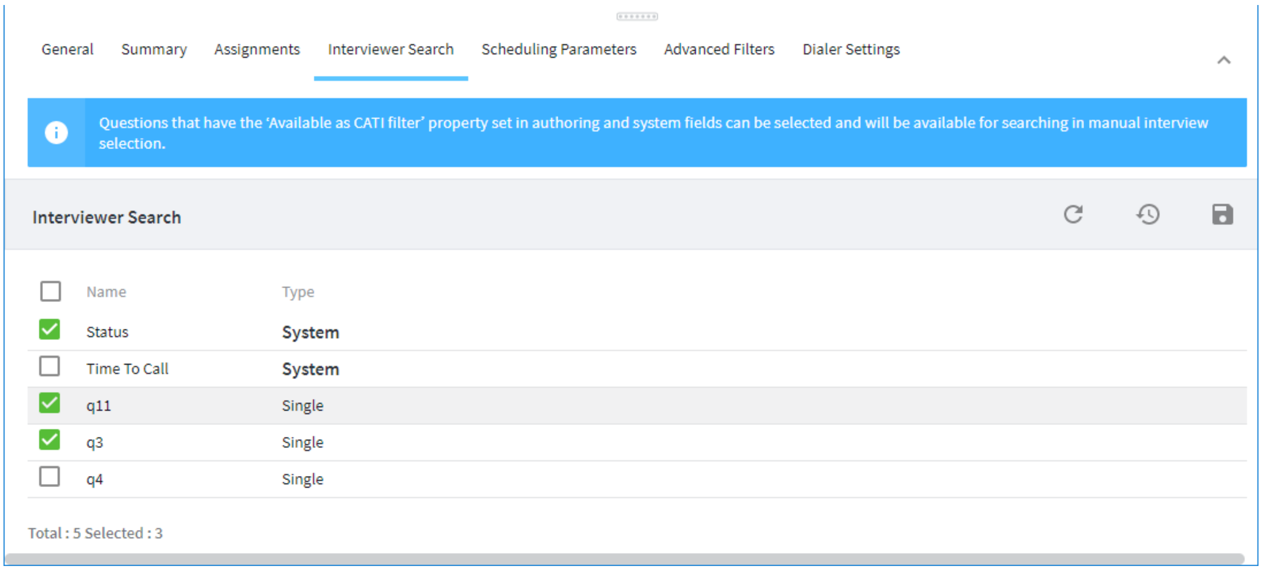


Figure 102 Viewing the Interviewer Search tab contents

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 (see (go to Parameterized Scheduling Scripts on page 228 for more information) for details) and then applied to the scheduling script actions can be observed on the Scheduling Parameters tab of the Survey Information view. Supervisor can modify these parameter values from the Scheduling Parameters tab.

No more than 30 parameters are allowed in a single scheduling script currently.

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 these values using procedures described in (go to Parameterized Scheduling Scripts on page 228 for more information)

To edit scheduling script parameters for the current survey:

1. Display the list of surveys in the top frame by selecting Surveys in the Navigation menu. Right-click the row in the grid in the top frame, which contains details of the required survey and choose View from the shortcut menu, or click the View button on the toolbar. This will display the survey properties in the bottom frame of the browser window.

   Change to the Scheduling Parameters tab.

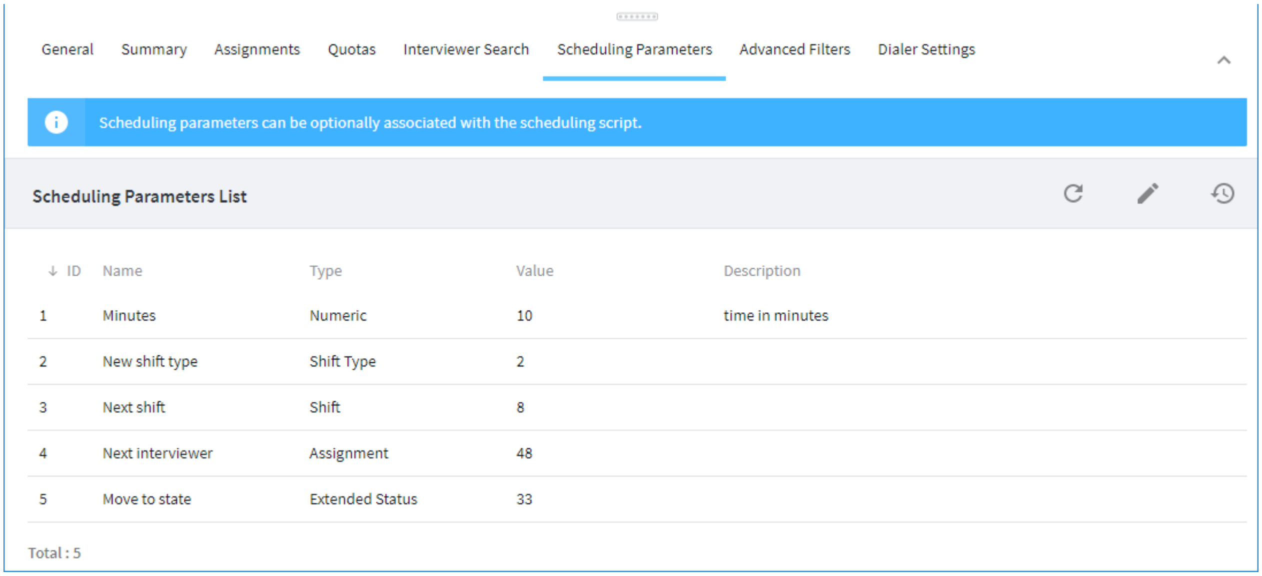


Figure 103 Viewing the parameter settings of the scheduling script currently used with the survey

The tab may be empty if there are no parameters applied to the scheduling script.

If any parameters are used with the scheduling script actions the grid will contain the list of these parameters (like in the picture above).

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

   This will display the Edit Parameter dialog.

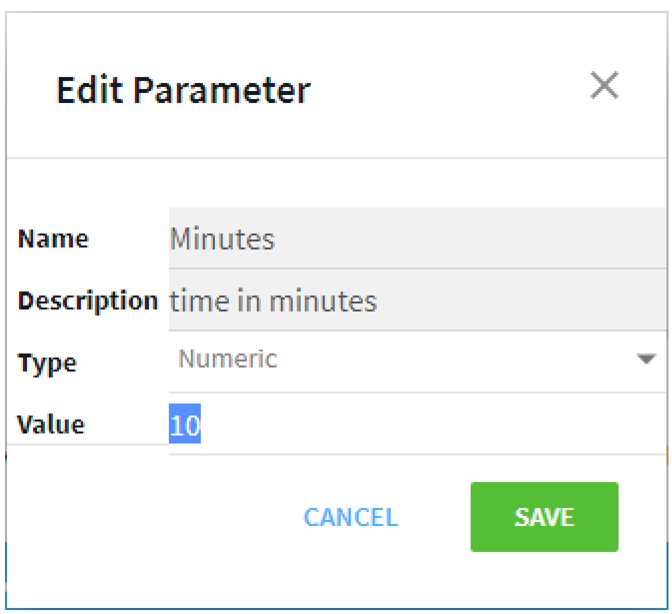


Figure 104 Editing scheduling script parameter from the Scheduling Parameters tab

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

3. Edit value in any field as required, and click Save to save the new values, or click Cancel to close this dialog and discard the 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. This will set ALL parameter values 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 (see (go to Parameterized Scheduling Scripts on page 228 for more information) for explanation).

Mind that 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. All default parameter values can only be set using the Parameters tab of the scheduling script view (see (go to Parameterized Scheduling Scripts on page 228 for more information) for explanation).

3.3.11. Configuring the Survey Related Dialer Settings

The supervisor 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) - see Enabling and configuring the Dialer for information. The dialer settings set is available on the Dialer Settings tab of the Survey Information view.

The set of dialer settings is different for companies using different dialer types.

In case the company does not use any dialer to conduct surveys, the Survey Information view will not contain the Dialer Settings tab at all.

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. Change to the Dialer Settings tab.

   Different dialer configuration settings are available for different dialer types: to understand the meaning of each you should consult documentation supplied by the dialer vendor.

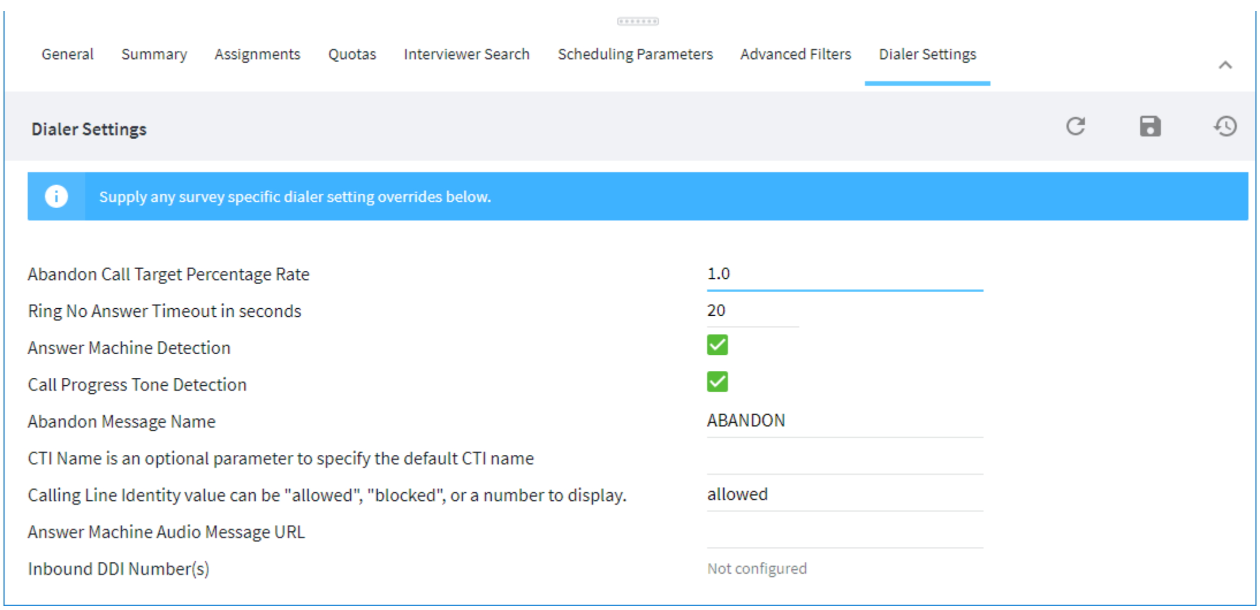


Figure 105 Configuring the survey related dialer settings

To configure the dialer enter required value(s) in the fields (all fields are optional).

Different dialer configuration settings are available for different dialer types: to understand the meaning of each you should consult documentation supplied by the dialer vendor.

Some settings are connected with certain parameters which are set up in the CATI Supervisor module. These include:

- Inbound DDI Numbers - an integrated dialer will contain a field showing DDI numbers associated with the survey (see (go to Configuring Settings Related to Inbound Calls on page 376 for more information) for information regarding DDI numbers).

3. You can reset the entered values to the default at any time by pressing the Reset button on the bottom right frame toolbar. When this button is pressed all settings are reverted to the values that are currently specified on the Dialer tab, in the Dialer Settings view (see (go to Managing Dialers on page 360 for more information) for 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 Confirmit surveys.

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

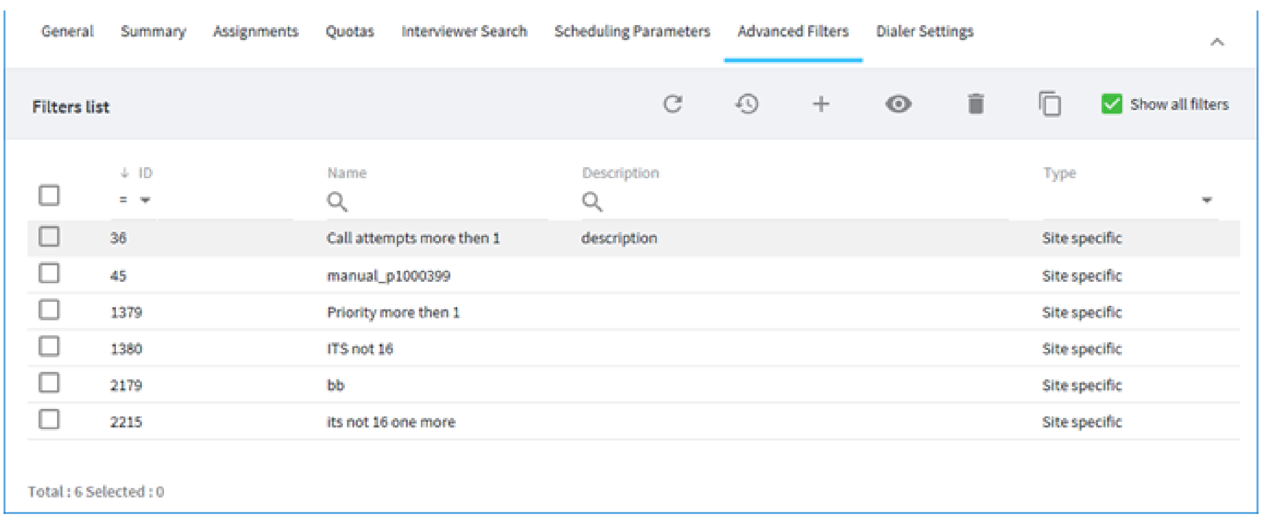


Figure 106 Survey view - Advanced Filters tab

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 window
	PROPERTIES	Displays the Filter Properties dialog window 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 window 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

To view the existing filters:

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.

   This will display the survey information in the bottom right frame of the browser window.

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

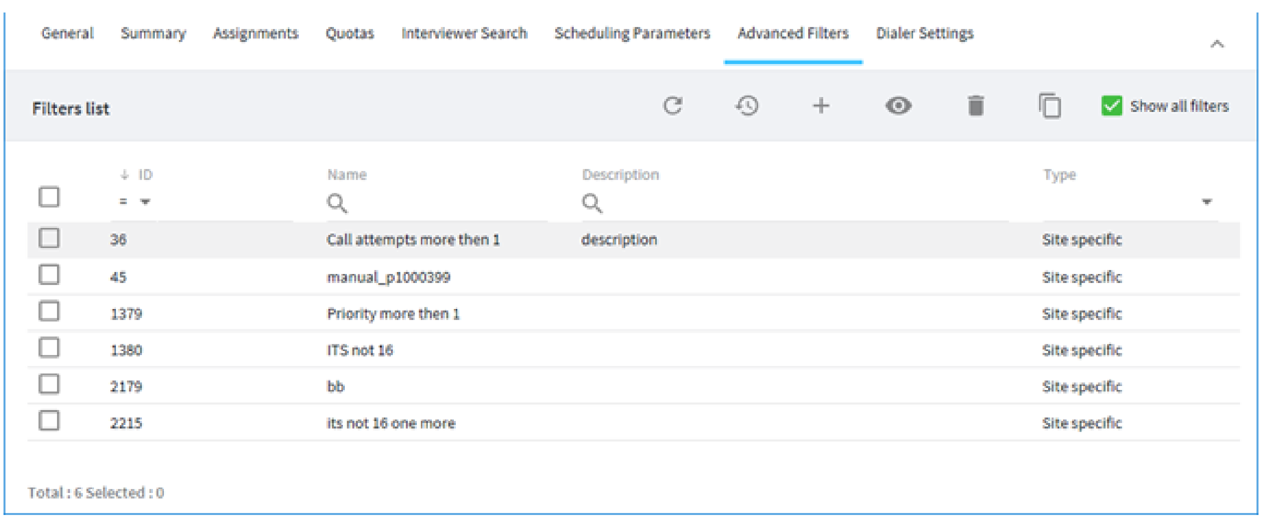


Figure 107 Survey properties - the Advanced Filters tab

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

   The grid contains the following columns:

- ID – this is the filter ID.
- Name – the filter name.
- Description – the filter description
- Type – the filter type (either site, or survey specific)

  To display all filters existing in the system, the user should check the Show all filters box located above the grid. Then the filter list will 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 the user can click the Refresh button .

3.4.2. Creating a New Advanced Filter

To add a new filter:

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.

   This will display the survey information in the bottom right frame of the browser window.

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

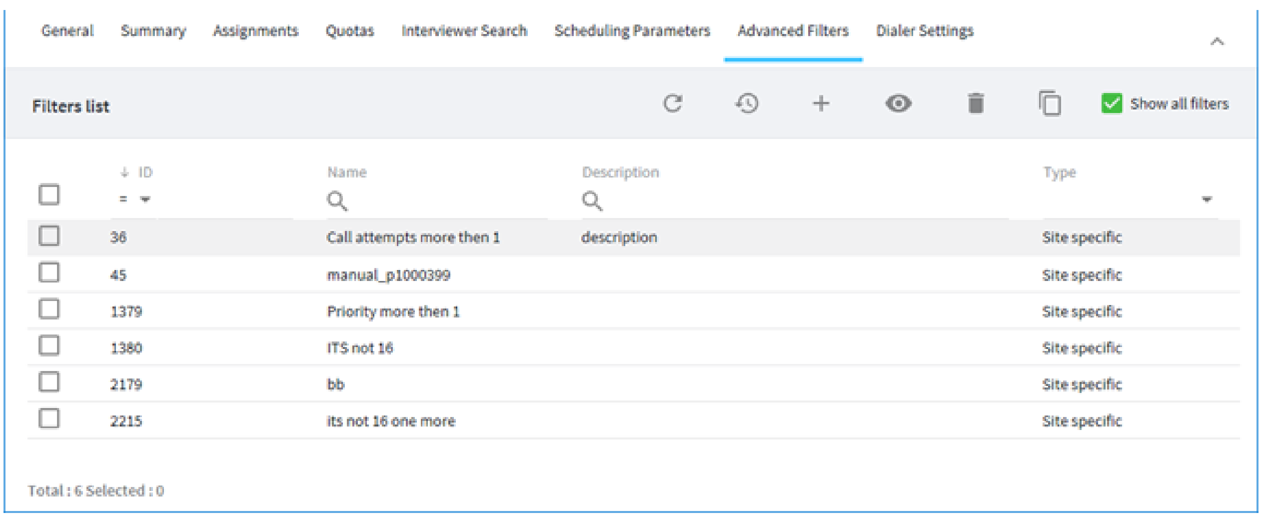


Figure 108 Survey view - the Advanced Filters tab

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. This will display the Add Advanced Filter dialog window.

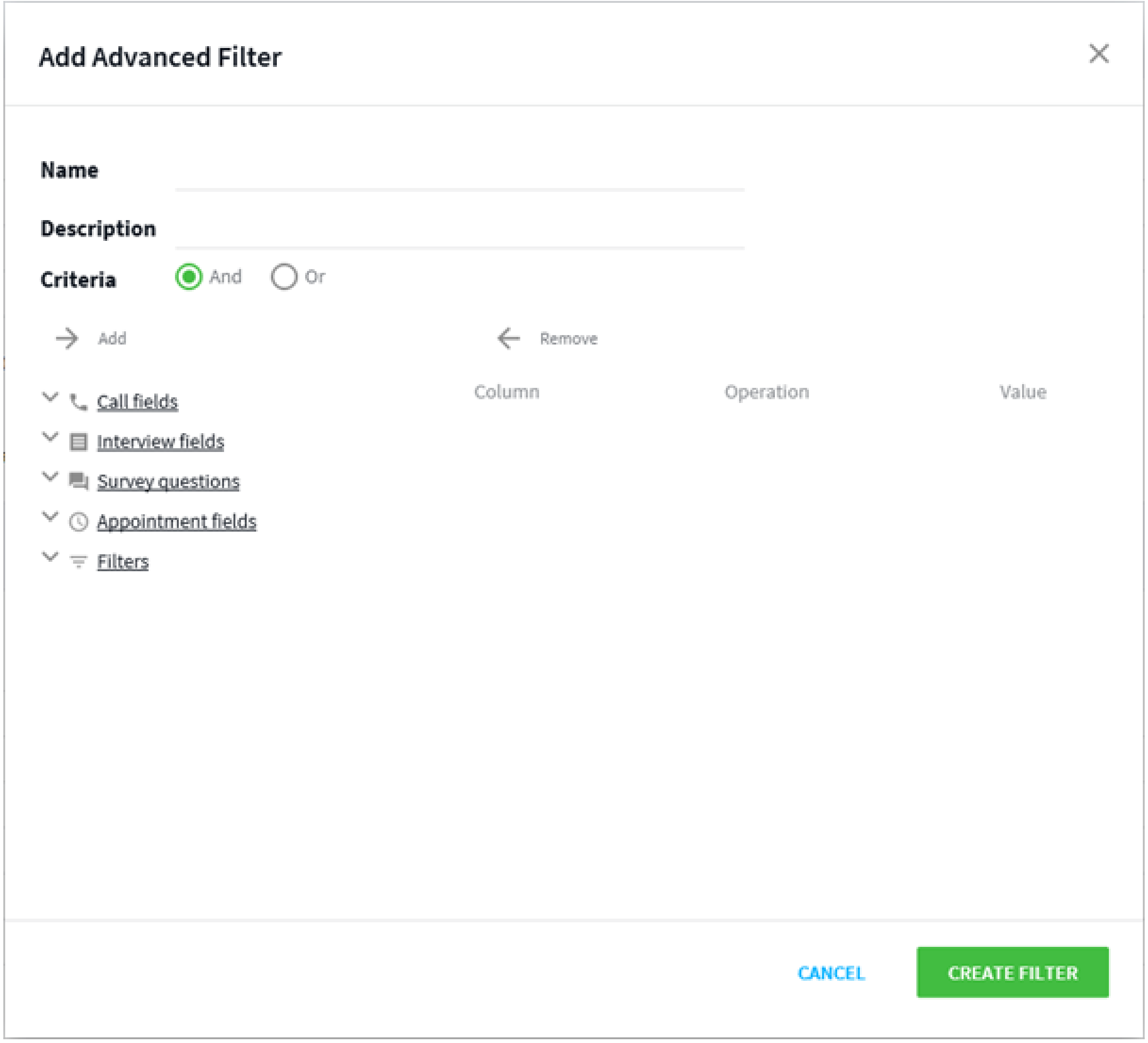


Figure 109 The Add Advanced Filter dialog window (empty)

4. To create a new filter you should specify the required parameters using the following fields in the dialog window:

- **Name** – the filter name.
- **Description** – the filter description.
- **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. Next you should specify a condition set that will be used as a filter. A filter can include as many conditions as required. Any condition includes a variable name, a comparison operator, and a value to compare against. First you should select a variable in the Variables pane (the left pane in the dialog window). These variables in fact are certain 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.

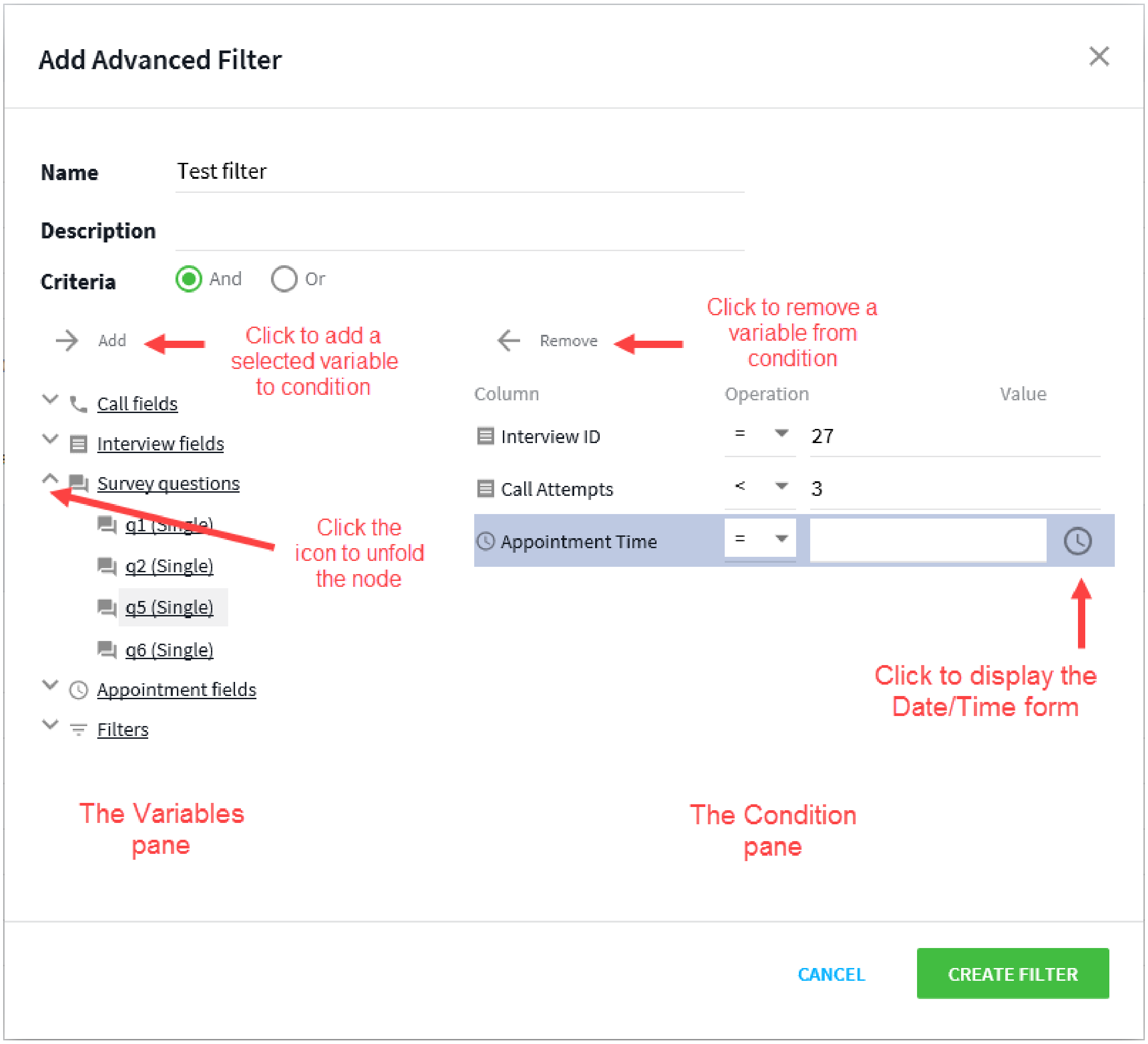


Figure 110 The Add Advanced Filter dialog controls

Select a variable (you can select only one variable at a time) in the Variables pane and click the Add button (or double-click the variable) to create a condition based on this variable. You can add more variables to the condition in the same way.

The selected variable is then displayed in the Condition pane. To complete a condition you should select the required operator from the drop-down box in the Operation column and also specify the value (in the Value column) to compare the data against.

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

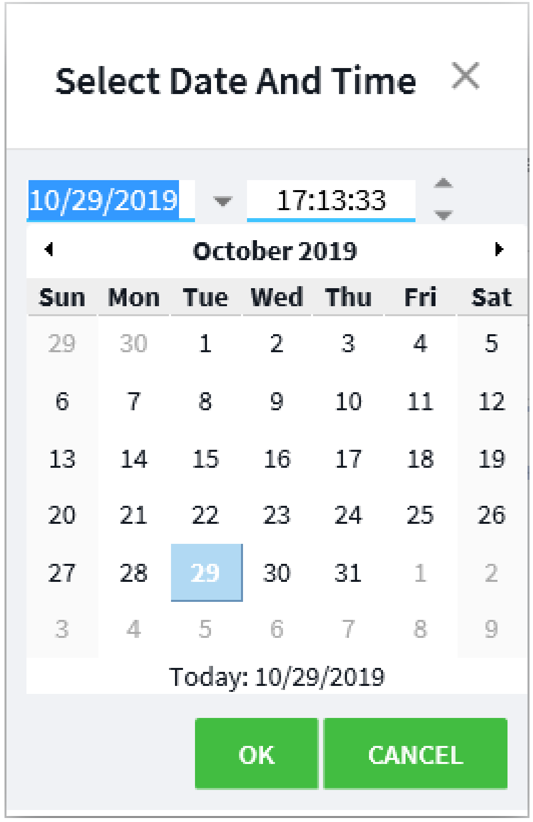


Figure 111 The Date/Time form

This form allows you to enter the required date and time. By default the form displays the current system date and time.

Using the calendar form controls you can:

- Choose a date in the calendar by clicking on it;
- Browse through months by pressing the arrow buttons above the weekday names;
- Select a month from the drop-down list;
- Select a year from the drop-down list.

You can set up the required time in the Time field using a clock with the spin controls. The selected date and time will be used as the condition value when you click OK in the Date/Time form.

6. Repeat step 5 to add another condition to the filter. You can add as many conditions, as it is required.

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

7. You can also add a complete condition from any available filter. Select a filter in the Filter node to add. Filter condition you add this way is not revealed in the Condition pane - you have to view the filter separately using the View facility to check it (go to Viewing and Modifying the Advanced Filter Properties on page 115 for more information).

8. Finally click the **Create filter** button to create a filter.

   The created filter will appear in the filter list.

3.4.3. Viewing and Modifying the Advanced Filter Properties

You can view the properties of any created advanced filter. The same view operation also gives you the possibility of modifying this filter's properties. Filter properties are modified using the same Edit Advanced Filter properties dialog, which is similar to the Create Advanced Filter dialog. To modify the advanced filter properties:

1. Right-click the row in the grid in the top frame which contains details of 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.

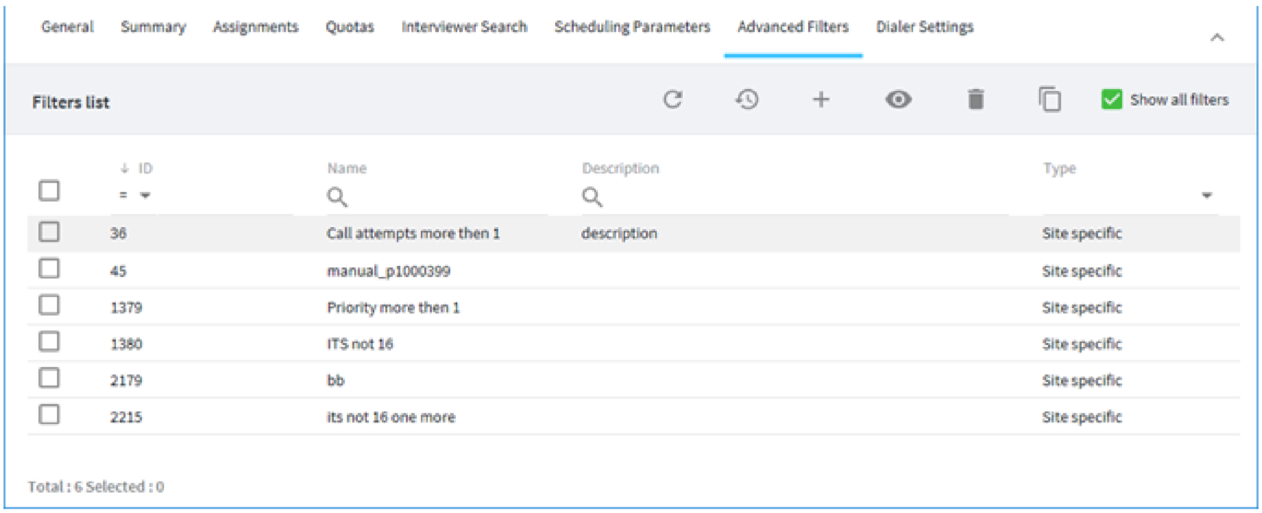


Figure 112 Survey properties - the Advanced Filters tab

2. 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 the Advanced Filter properties from the shortcut menu, or double-click the required advanced filter. This will display the Edit Advanced Filter dialog window.

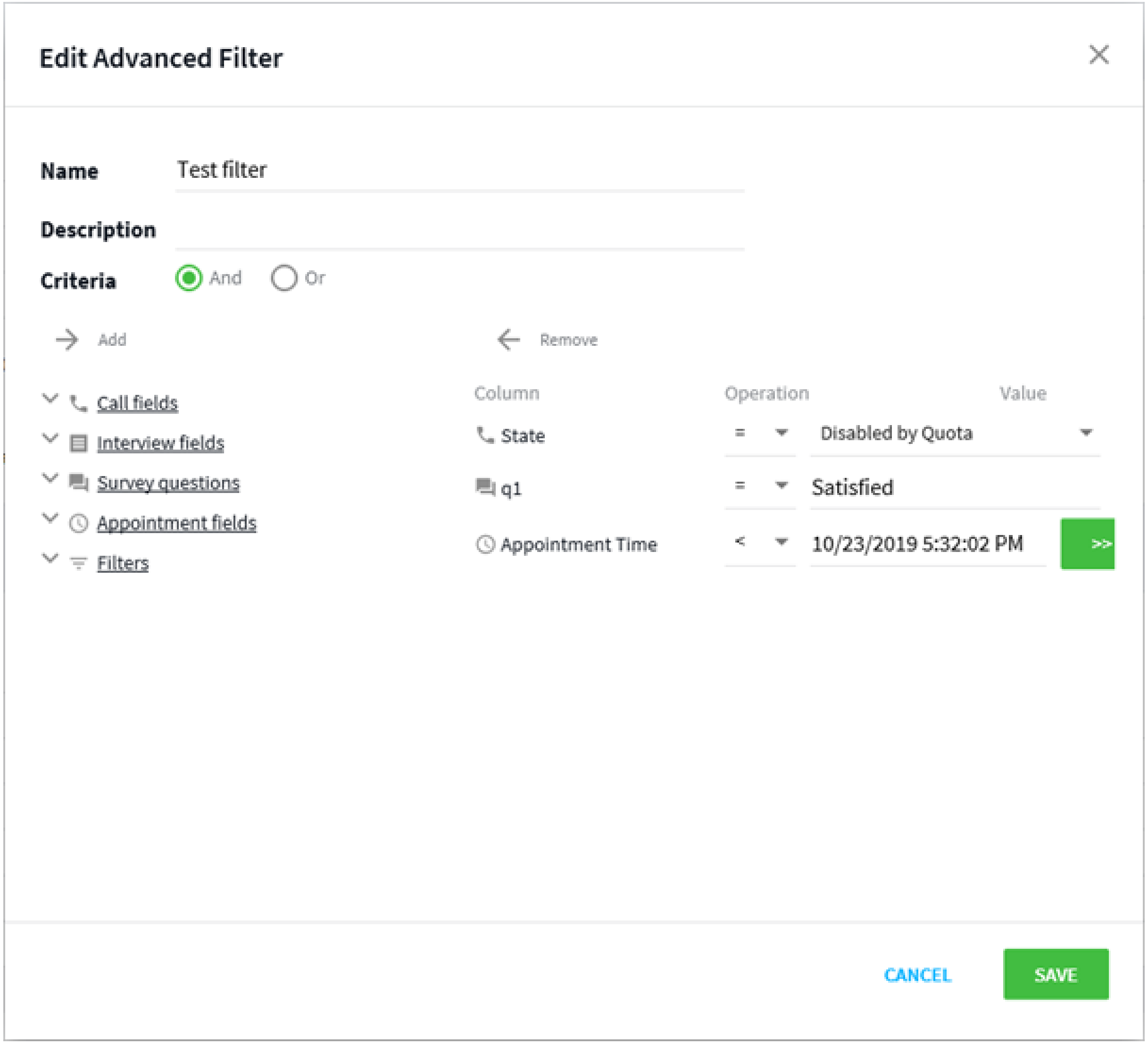


Figure 113 The Edit Advanced Filter dialog window containing filter parameters

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 111 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 later be re-used in another survey. To accomplish this, you can copy (or move) advanced filters already existing in one survey to another survey.

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

Pay attention that copied/moved filters are not verified in the course of the copy/move operation. These filters, for example, may reference variables which are absent in the target survey. Filters are copied/moved regardless of any inconsistencies, but they will generate error messages when used in any operation.

Mind 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 required survey (the one that will be used as "destination" survey for copying/moving advanced filters from the "source" survey).
2. Open the survey in the View mode and change to the Advanced Filter tab (see (go to Viewing and Modifying the Advanced Filter Properties on page 115 for more information) for instructions).
3. Click the Copy/Move filters from survey button . This will display the Copy/Move filters from survey dialog window.

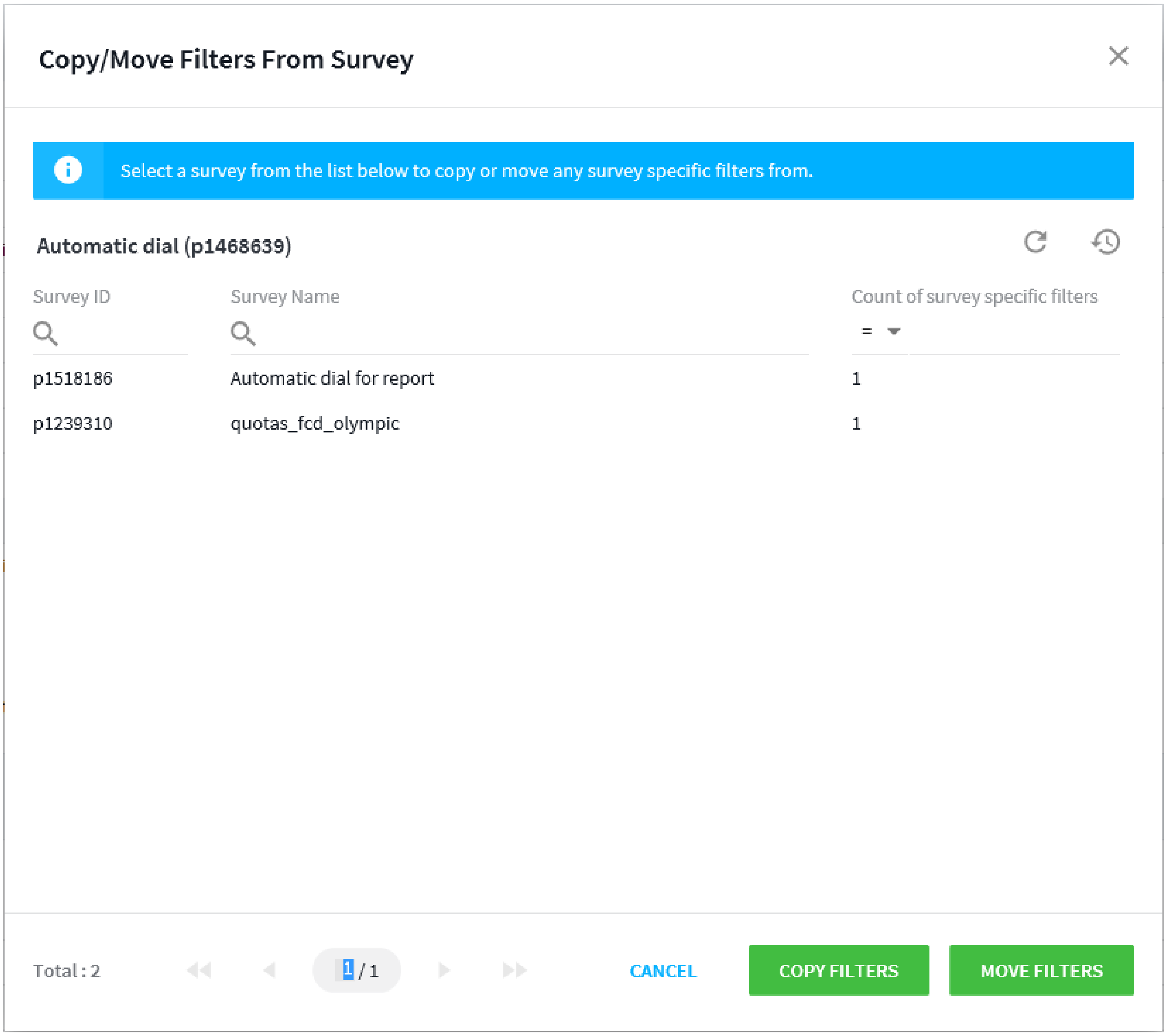


Figure 114 Copying or moving advanced filters from the selected survey to the current survey

This window lists all Confirmit projects with the survey specific filters which you have access to (a survey in CATI terms is almost similar to Confirmit project and references the same entity in this case). The grid shows the project IDs, project names and the quantity of survey specific filters for each survey. If you choose a survey to copy/move survey specific filters from, you would copy the displayed number of survey specific filters from this survey.

4. Select a survey you would like to copy/move filters from.

Depending on what operation you intend to perform click either the Move Filters, or Copy Filters button.

The Copy operation is performed silently - the Copy/move filters... dialog window closes, and the Filters tab in the current survey properties refreshes showing the copied filters in the filter list.

The Move operation requires additional confirmation - when the Move Filters button was pressed the confirmation dialog opens.

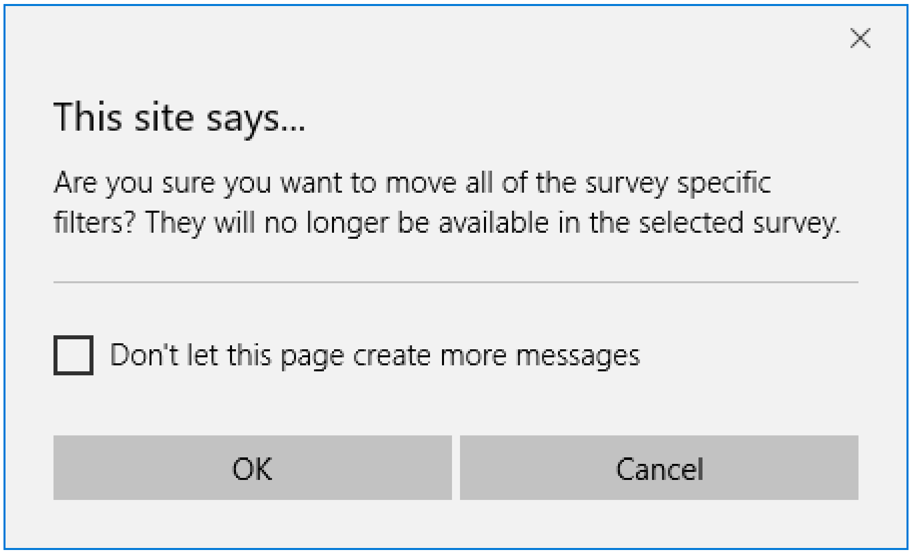


Figure 115 Confirming the Move Filters operation

Click OK in this dialog to proceed with moving filters. The filters then are moved silently - the Copy/move filters... dialog window 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 required survey in the top frame, which contains advanced filters you need and choose View from the shortcut menu, or click the View button on the toolbar.

   This will display the survey information in the bottom frame of the browser window.

2. Change 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.

4. The filter is removed from the filter list and from the system. Please be aware 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 certain periods of time. This view is complemented with two convenient breakdown views which provide additional details.

This feature is available only for surveys that are run in the "Predictive" dialing mode (this setting is chosen in the Confirmit Authoring module, refer to the Confirmit 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 120 for more information).

The described view includes three stacked grids (see the picture below). The topmost grid provides information regarding the amount 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 (by default it is 20 last requests) and shows the list of interviewers/groups to whom the calls were delivered.

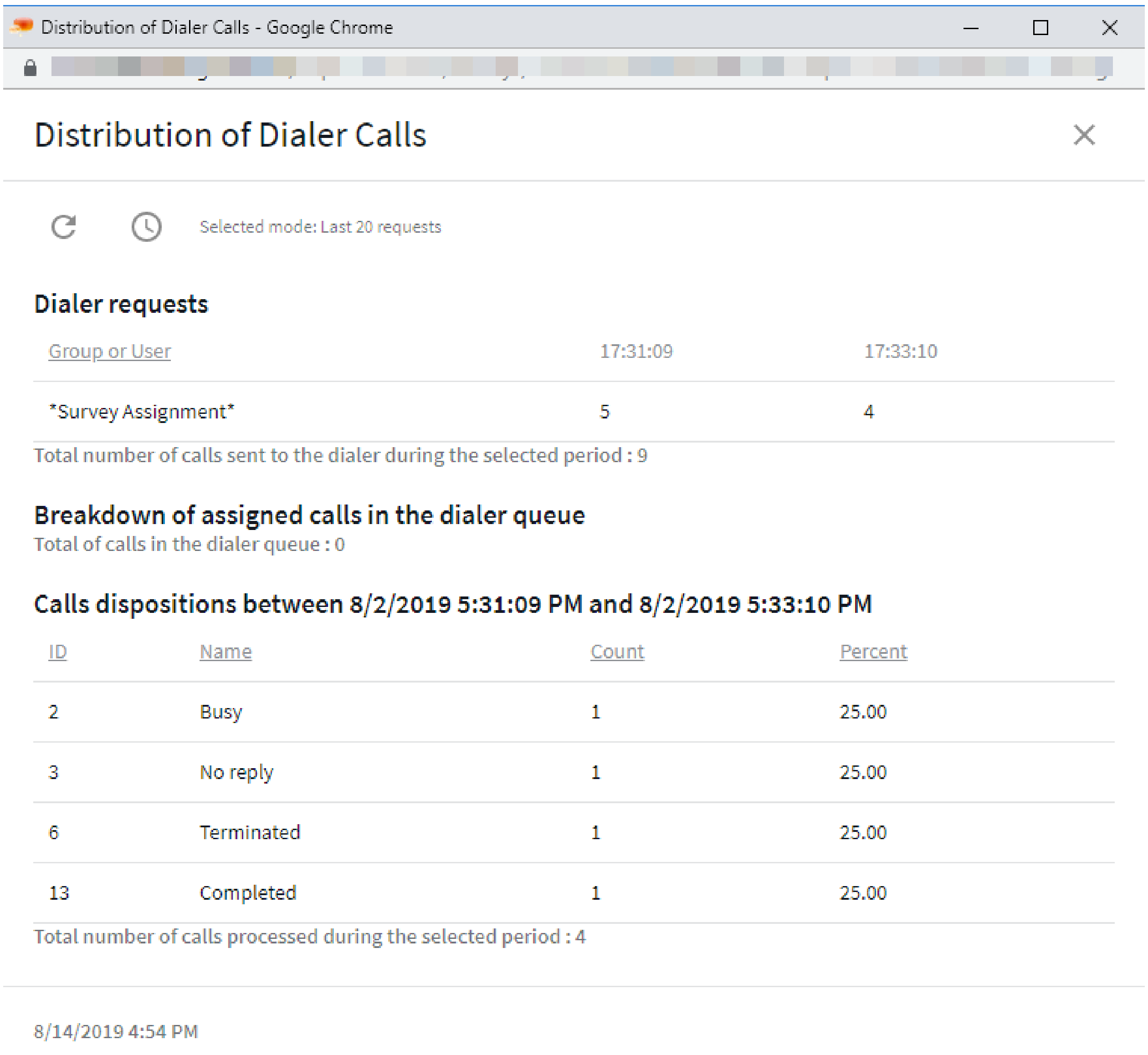


Figure 116 Viewing distribution of dialer calls

The grid in the middle presents call list broken down by assignments - calls that are assigned to a survey, assigned to interviewers, or to interviewer groups.

The bottom grid shows 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 results of the last 20 requests made by the dialer. Supervisor can specify the start time to show the list of requests from, or he can choose to view call distribution for the last 20 requests.

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 row in the grid in the top right frame, which contains details of the required survey and choose Distribution of Dialer Calls from the shortcut menu.

   This will display the Distribution of Dialer Calls window. In case no call history was recorded for the survey, the Distribution of Dialer Calls view will appear empty, each grid 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 telling that this view is available only for Predictive surveys.

3. By default the view is set to show 20 last requests. To specify another period for analysis click the Time button on the toolbar. This will display the dialog which you can use to choose the start time.

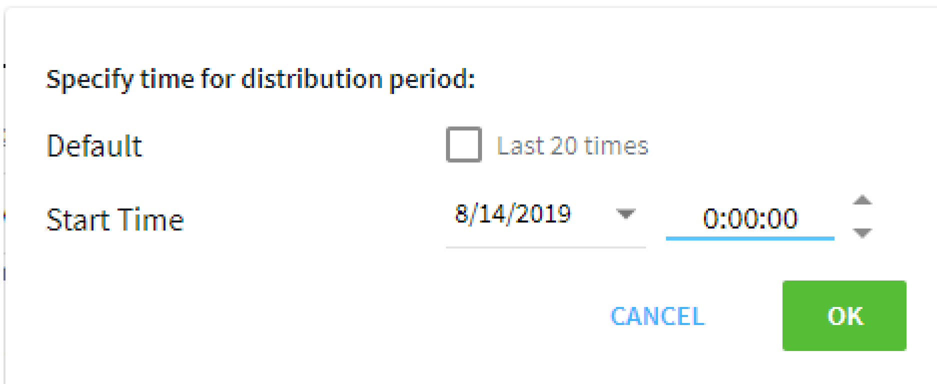


Figure 117 Specifying the start time for viewing active call distribution

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 from the Start Time drop-down list that will appear after the Default box is cleared, and then use the spin control to set the start time.
5. You can periodically update the view by pressing the Refresh button on the toolbar.

3.6. Call Management

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

This vital part of the CATI Supervisor module lets you monitor and manage the interviewing process from a single convenient interface – 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 dialog windows, 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. I.e. 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 window you can perform a wide range of operations with interview/call objects including 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 (see (go to Reviewing Interviews with the Reviewer Application Module on page 160 for more information));
- Assign/deassign interviewers to surveys (go to Survey Assignments on page 188 for more information).

Most of the interview/call management procedures are performed with the use of the dedicated dialog windows.

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.

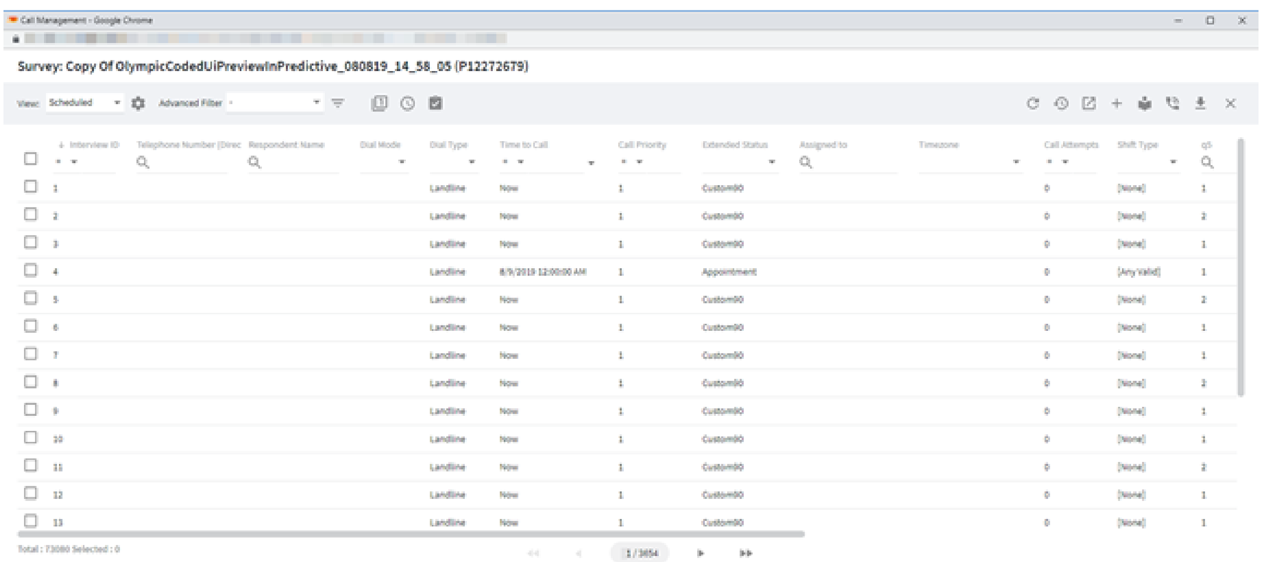
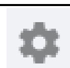
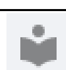


Figure 118 The Call Management dialog window

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.
	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 amount 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 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.

   This will display the Call Management window.

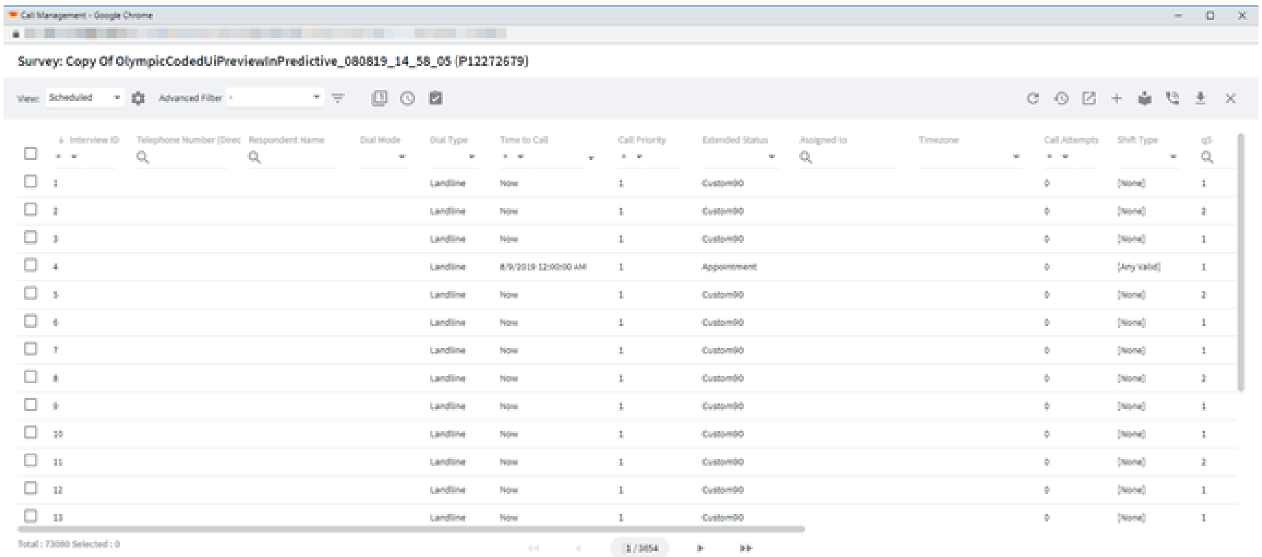


Figure 119 The Call Management window

2. The list in this window allows viewing properties of the interviews/calls in the selected state.

   There are four types of interview/call views, and an option to view interviews/calls of all four types as a single list. You can choose to display only "Scheduled", "Not Scheduled", "High Priority", "Sent to Dialer" or "All" interviews/calls by selecting the corresponding option in the View drop-down box at the top of the list.

   The **"All"** option allows all interviews and calls that currently exist for the selected survey to be viewed.

   The **“Not Scheduled”** option will list only interviews that are not scheduled anymore – these interviews were once scheduled and became calls, but scheduling was canceled for some reason. For example, this may be interviews with the following Extended Statuses - Completed, Terminated and a number of others.

   Scheduling means that an interview is configured to be delivered to an interviewer (not necessarily to the particular interviewer, maybe just to any available) at the specified time intervals (shifts). Such interview is then complemented with a certain property - a "Call". Calls are interviews which can be delivered to an interviewer and conducted by him.

   Calls in the **"Scheduled"** state are planned (scheduled) to be delivered to an interviewer at the specified moment of time.

   A scheduled call can potentially be shown in the **"High Priority"** list. Scheduled calls are shown in the "High Priority" list based on certain criteria among which we should mention the Interview ID value - interviews with lower ID values are more likely to be shown in the High Priority list. Please keep in mind that "High Priority" is not a State but rather a collection of calls which are likely to be delivered to the interviewer in the shortest term future.

   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 Confirmit Horizons and so all actions in this view are disabled.

It should be noted 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 315 for more information).

The Call Management window also allows viewing the "disabled" calls - calls that bear the special mark which prevents them from being delivered to the interviewer. The disabled calls are displayed only in the Scheduled and All views. In the Scheduled view the disabled calls are grayed out in the call list. Additionally an appropriate indication is shown in the dedicated column called "State". The disabled calls are also displayed in the All view list, but they are not marked in any way in this view. Disabled calls are not included in the Not Scheduled views. Refer to (go to Disabling and Enabling Calls on page 135 for more information) for more information on disabling and enabling calls.

3. Property sets displayed in the grid as columns depend on the chosen state. Since the amount of properties is quite large, the grid usually exceeds the width of the window. You can adjust the width of columns and this adjustment will be retained even if you close and then re-open the Call Management window.

   There are three basic predefined property sets – Interview, Call, and Appointment.

   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 135 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. User can decide which columns and in which order are displayed in the table when they choose a **Scheduled** view from the "View" drop-down list. See (go to Customizing Call Management Scheduled Views on page 125 for more information) for detailed instruction on customizing Scheduled views.

5. To update the interview/call list you should click the Refresh button on the toolbar.

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, and vValues can be entered 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 123. To apply an exact match filter, enclose the search string in double quotes e.g. "1". 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 so that it would be displayed each time the Call Management interface is opened.

Any custom view created by one supervisor will become accessible for all supervisors operating in the same company.

Customizing Call Management Scheduled views

1. To customize a view upon choosing the Scheduled view the user should choose the Customize View button next to the View drop-down list and select Add from the drop-down menu. This will display the Create Custom View overlay dialog, like this.

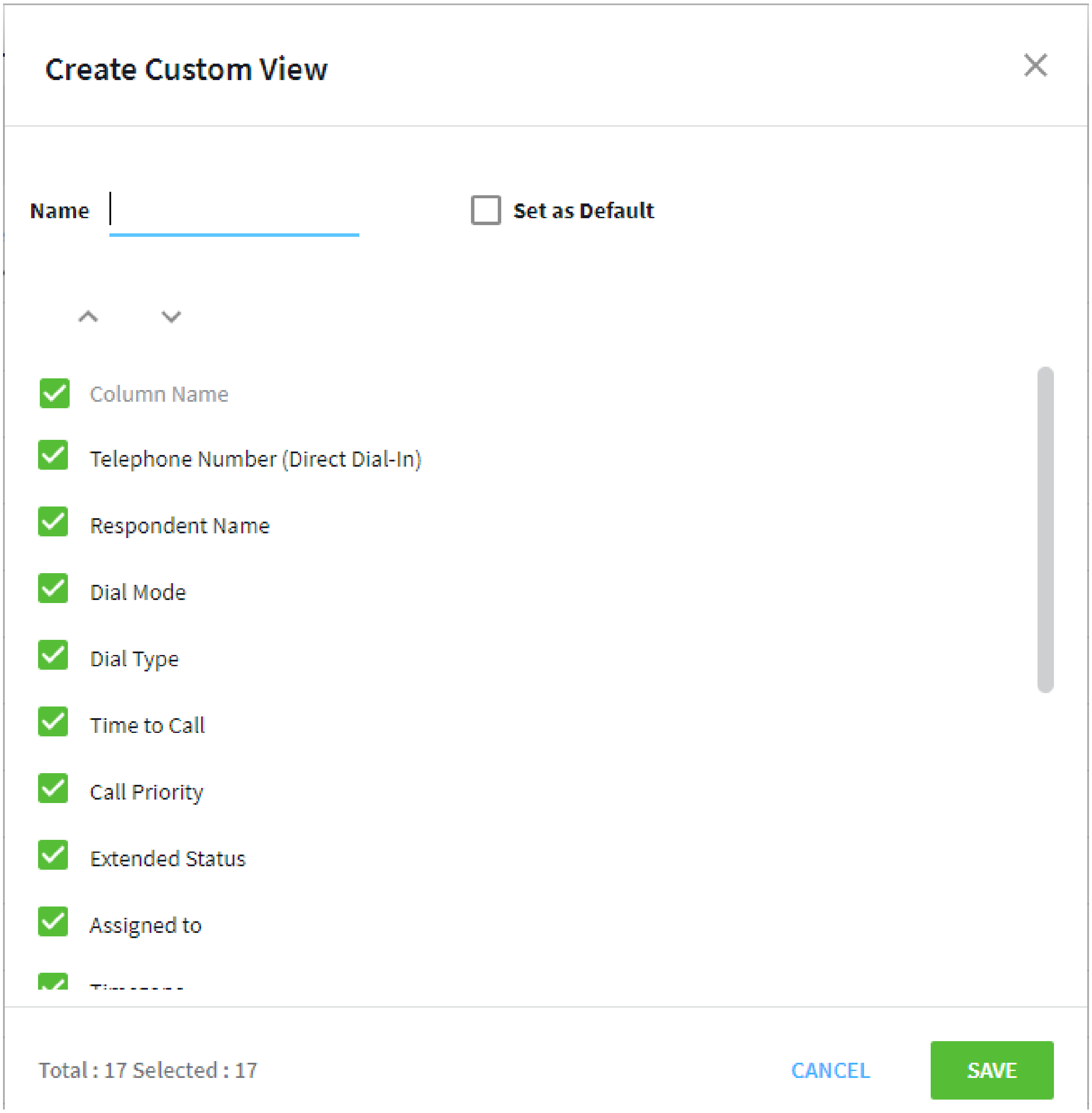


Figure 120 Customizing Call Management view

The list in this dialog contains names of all columns currently available for the Scheduled View.

2. Put a check mark in a box before the name of the column you want to be displayed in this view. Clear all check-boxes corresponding to columns you want to hide from this view.
3. Click the Up or Down button in the right side of the toolbar to move the column one position to the left (Up) or to the right (Down) in the table. A special item in the list labeled "Place Holder for Question Variables" makes it possible to adjust the order of columns for any question variables that might have been added to the view, these can be re-positioned as a block.
4. Enter the name of the custom view you create in the Name field. Check the Set as Default option if you want this customized view to be displayed by default when you open the Call Management window. Click Save when you are done.

The name of the saved table layout then becomes available in the View drop-down list.

5. When a customized view is chosen 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.

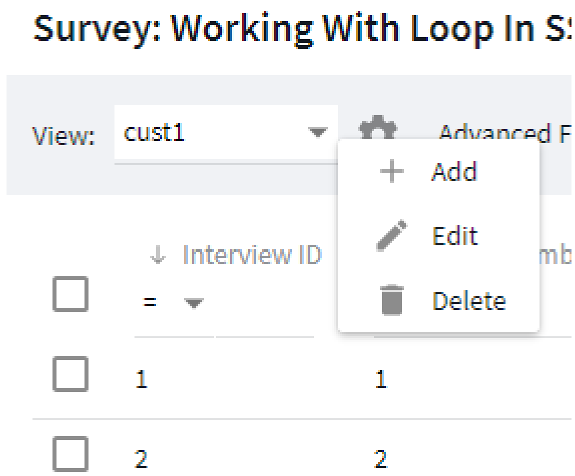


Figure 121 Customize View drop-down menu commands

Choose Delete to delete currently selected custom view. Choose Edit to modify currently selected custom view.

6. When the Edit command is chosen, the Edit Custom View overlay dialog is displayed. It is similar to the Create Custom View dialog described above. Column visibility, position, the View name and "default" option are editable. Click Save when you are through modifying the layout settings.

3.6.3. Changing the Survey in Call Management

The supervisor can change the survey with which he currently works in the Call Management window. This will provide a possibility to work with the related interviews without closing the Call Management window and repeating survey selection procedure again.

To change a survey while in the Call Management window

1. Click the Surveys button  in the Call Management window toolbar. This will display the Select Survey window.

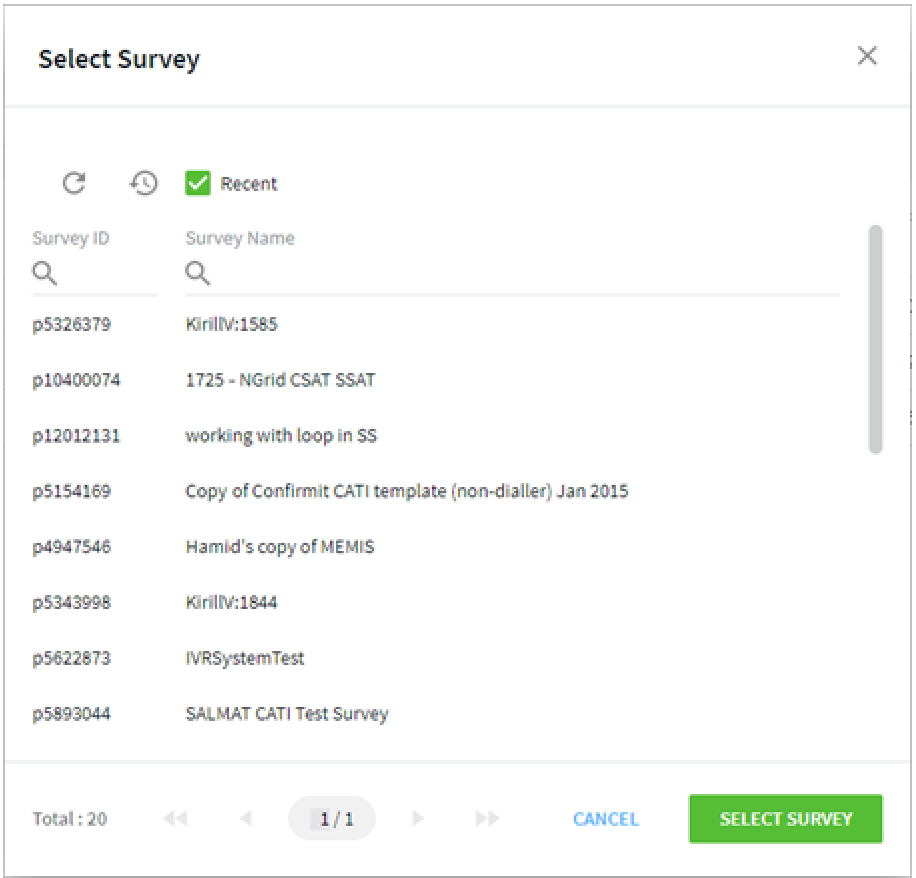


Figure 122

2. Select a survey by clicking on its name. Then click the Select Survey button in the bottom of the window.

   Recent Surveys

3. 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. When the Recent box is checked, a maximum of twenty such interviews is shown, while other surveys are hidden. When the Recent box is cleared, all surveys are revealed.

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 detailed list of all actions and operations that were ever performed with the current interview and also provides access to captured data regarding certain interview questions which are contained in the special loop called "callhistoryinfo".

The Interview History dialog window contains three tabs:

- The "Call Attempts" tab gives you access to the basic information regarding all the call attempts made;
- The "Extended Call History" tab displays the list of all operations which involved changing the call/interview properties;

- The "Call History Loop" contains data only if the survey was designed using a special template including the "callhistoryinfo" loop. Then this tab shows captured data regarding certain interview questions which are contained in this loop.

The "Call attempts" tab

The Call attempts list displays information about:

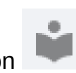
- Any calls processed by an interviewer;
- "Not Connected" calls processed by a dialer (for predictive and non-predictive surveys).

The first record shown in the list on the "Call attempts" tab always reflects the fact of addition of the interview to CATI (this is the moment it was first assigned the Fresh Sample extended status).

Note that manual rescheduling, priority change and other operations that are performed through the CATI Supervisor interface are not reflected in that view - here you can see only the list of calls that were conducted with the use of the CATI Interviewer Console. These and other operations are shown on the "Extended call history" tab of the Interview History dialog window (see The "Extended History" tab).

The Call Attempts list can be updated manually when required - click the **Refresh**  button on the toolbar to do this.

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 121 for more information).
2. Select an interview or a call in the Interview/Call list and click the **History** button  on the toolbar.

   This will display the History modal window. Go to the Call Attempts tab to view the list of call attempts.

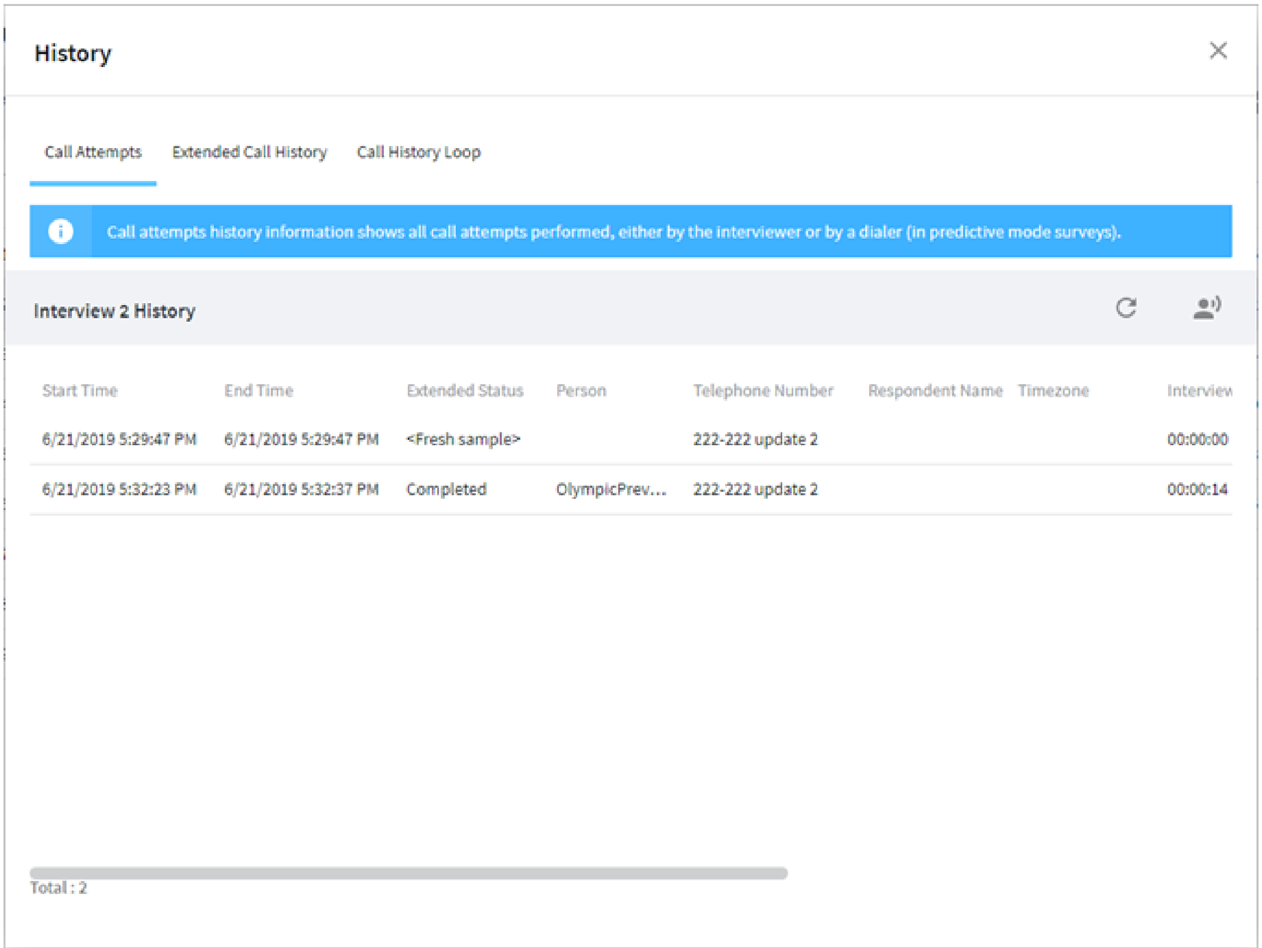


Figure 123 The History modal window with the Call Attempts tab displayed

The information in the Call Attempts tab is organized as a table where each row holds data regarding a single call attempt.

3. 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 finish 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 upon finishing of the event.

4. You can update the call list to keep it current. To do this click the Refresh button above the list.

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".

Not all operations change the extended status of a call. If such operation is listed, it is shown with the Extended Status column blank.

You can go deeper into details of some operations - refer to Step 3 of the instruction provided below.

To view the extended history for the current interview:

1. Display the Call Management window, and choose a required interview/call state (see (go to Viewing the Interview/Call List on page 121 for more information) for instructions).
2. Click the History button on the toolbar.

   This will display the History dialog window. Choose the Extended Call History tab to view the list of operations performed with the current call.

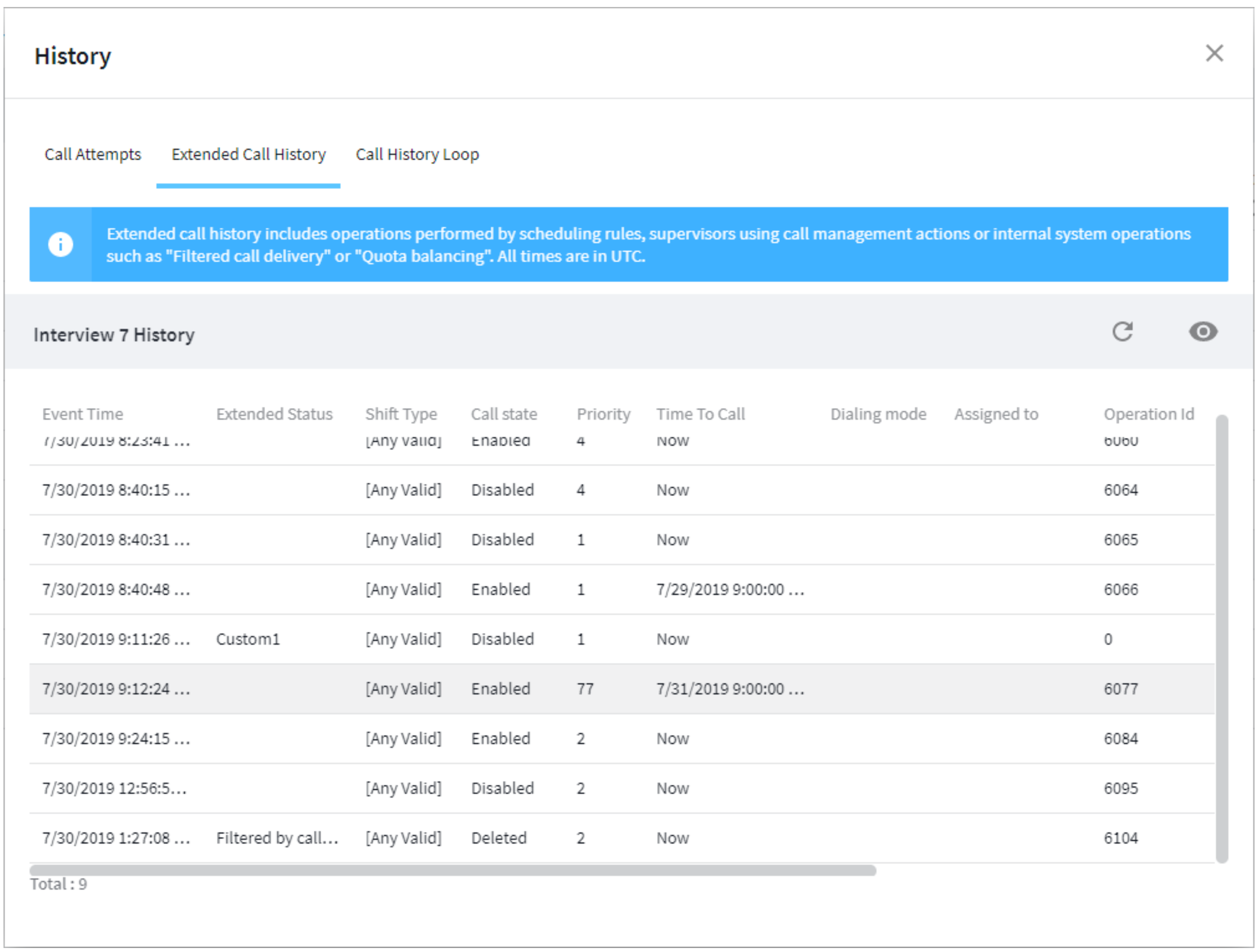


Figure 124 The History modal window with the Extended Call History tab displayed

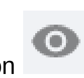
The following data is displayed in the table:

- *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.

3. You can view technical details regarding some operations. For example, you can view the user ID of the supervisor who performed the operation.

   To view operation details select the required operation and click the Operation Details button  in the toolbar above the table. This will display modal window that is similar to the one that is used to display details of the executed task (see the description of the View Task dialog for description of the window).

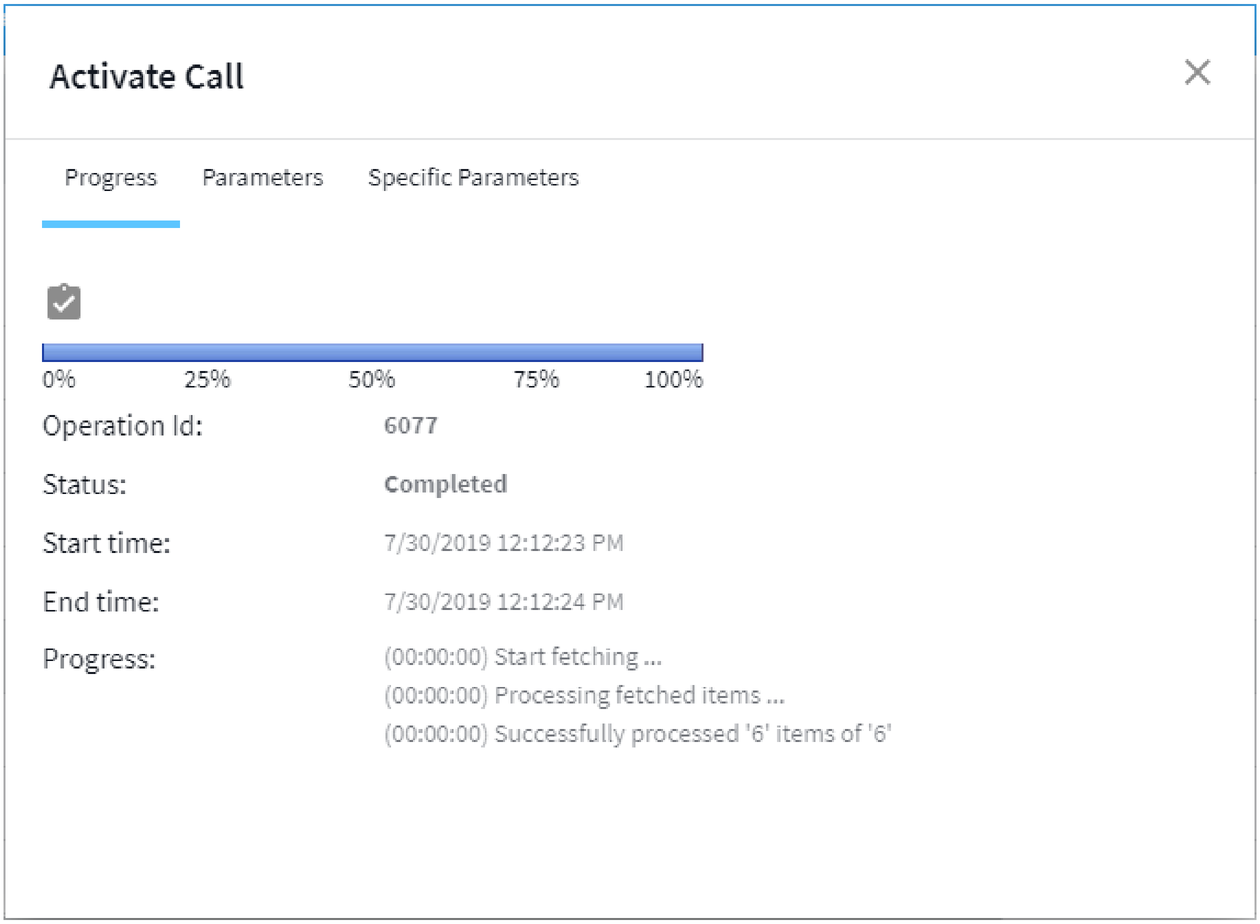


Figure 125 Operation details displayed in a modal window

Click the Close button in the upper right corner of the modal window to close it.

The "Call History Loop" tab

The Call History Loop tab allows viewing captured data regarding certain interview questions which are contained in the special loop called "callhistoryinfo". This is possible in case the "callhistoryinfo" loop has been added to the survey when it was composed in Confirmit Authoring.

Refer to the Confirmit Authoring manual for explanation on how loops are created and added to the survey.

In case the survey has been composed in Confirmit Authoring based on a survey template containing a default "callhistoryinfo" loop (and a corresponding script - see explanation below), the supervisor will be able to see data regarding predefined questions included into this loop by default.

The retrieval of the captured data from the "callhistoryinfo" loop is aided by the special script which is either included by default into the template that contains the "callhistoryinfo" loop, or should be manually added to the survey in case the survey author adds a new "callhistoryinfo" loop to the survey himself.

To add/exclude questions the supervisor has to either modify a default (in case the survey is based on the corresponding template), or create a new "callhistoryinfo" loop. The same goes to the script that retrieves loop info data - a default script should be accordingly modified, or a new one matching the new "callhistoryinfo" loop should be created and added to the survey.

The captured information contained in the "callhistoryinfo" loop is presented in the grid as a list of all call attempts (one call attempt per row) that were made from the moment the call was activated and up to the moment the Interview History button was pressed.

To view additional call history info:

1. Open the Call Management window (go to Viewing the Interview/Call List on page 121 for more information).

2. Choose the required interview/call in the grid and click the History button  in the Call Management window toolbar.

   This will display the History modal window. Change to the Call History Loop tab.

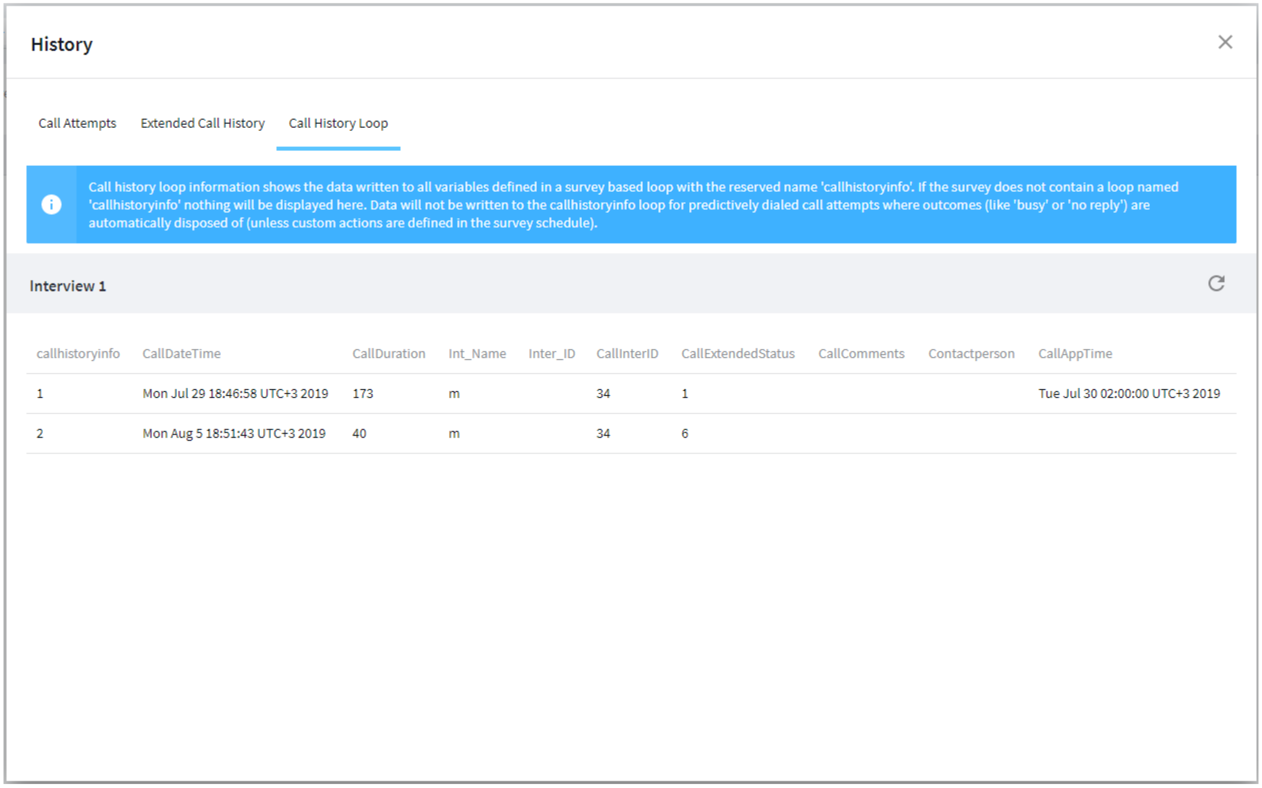


Figure 126 Viewing the call history loop info in the History modal window

3. Data contained in the "callhistoryinfo" loop are presented as grid columns and call attempts are presented as rows.

   The CallHistoryInfo is a set of data which are not collected by default by the CATI system - it is an 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 - they correspond to variables added to the Call History Loop in the Survey Designer (in the Confirmit Authoring module). The survey designer may include any variable in this loop. All captured data is shown as it is - it is not rendered in any way.

   Data will not be written to the callhistoryinfo loop for predictively dialed call attempts where outcomes (like 'busy' or 'no reply') are automatically disposed of (unless custom actions are defined in the survey schedule).

Note that if the survey has no "callhistoryinfo" loop, no loop data can be captured. The Call History Loop tab in such case is displayed blank, containing only the warning message: Unable to display survey history loop data for the survey.

4. You can refresh the view periodically to update the captured data. Click the Refresh button  on the toolbar to do this.

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 121 for more information).
2. Click the **Active Calls** button in the Call Management window toolbar.

   The Active Calls window opens.

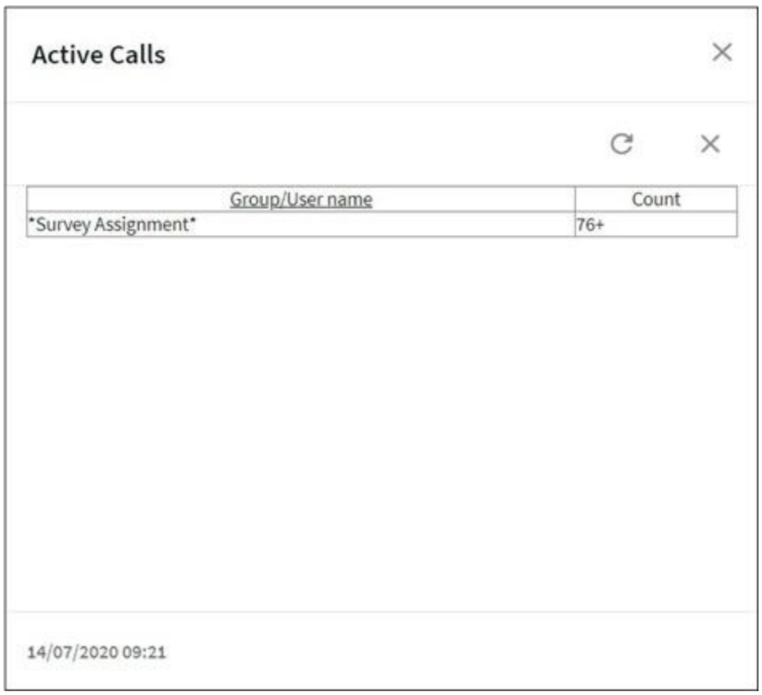


Figure 127 Example of the Active Calls window

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.

You can refresh the window periodically to get updated information regarding the call count and the working interviewer groups and interviewers.

3.6.6. Disabling and Enabling Calls

Whenever you need to prevent a call from being delivered to an interviewer, and still want this call to retain its properties, you may consider ***disabling*** this call. Returning the disabled call into a regular working state is referred to as "***enabling***" a call.

The CATI Supervisor module allows marking a call as "disabled" at any moment and at any time later removing this mark, or "enabling" this call again.

A call is "disabled" automatically when it has been filtered by FCD (due to the fact that a corresponding quota limit is reached) or by any other quota management rule.

A "disabled" call behaves almost similar to a regular (or what we can call this state here - "enabled") call. Properties of a disabled call are subject to any change that is initiated either by the system, or manually by a supervisor. The only exception is that a "disabled" call is never delivered to an interviewer while it remains in the "disabled" state. To turn a disabled call back into a regular call, the supervisor should "enable" it. An "enabled" call becomes a normal regular call.

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. It is not shown when other views are selected. A disabled call is highlighted either in red or in yellow in the call list in the "Scheduled" view. A disabled call is visible and is not marked in any way in the "All" view. The picture below illustrates the situation when the Scheduled view is displayed - note the State column (rightmost) which indicates the Enabled/Disabled call state.

The CATI Supervisor highlights in red calls that were disabled by user, and in yellow - calls that were disabled by Quota management rules. The rightmost column also indicates if a call was disabled by Quota management or by user.

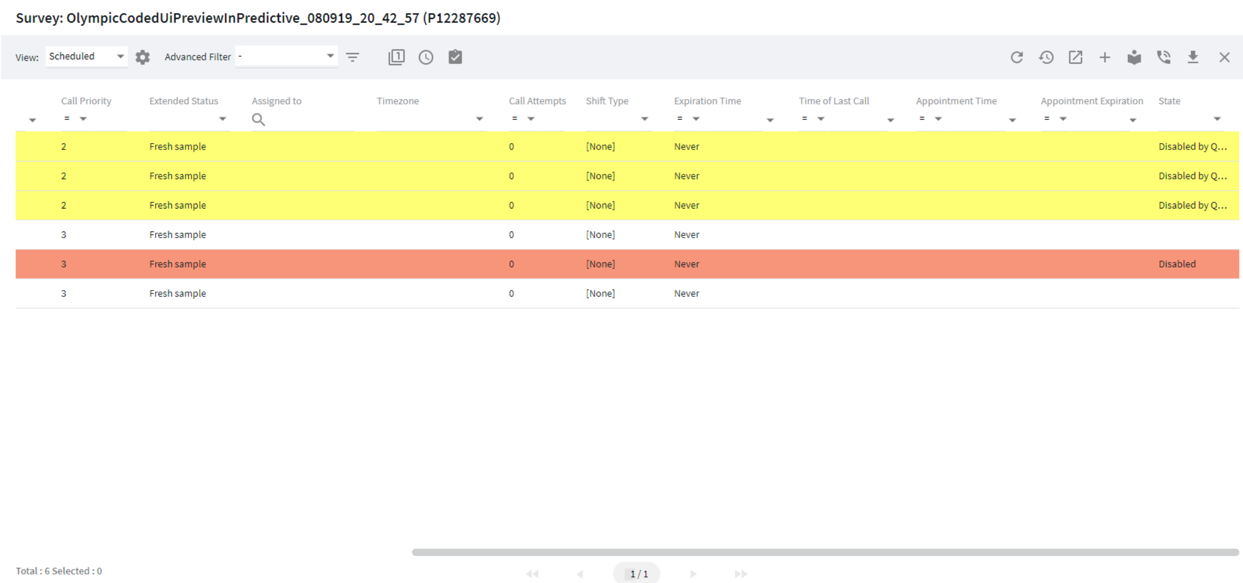


Figure 128 The Call Management window showing the disabled calls

When a scheduled disabled call is due for delivery 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 dialog windows and views and also with the help of the corresponding 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 224 for more information);
- as a result of a Quota management operation (e.g. 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 that they cannot be used until the quota limit for that cell is changed);
- with the help of the context menu command in the Call Management window (see (go to Disabling a call from a call list in the Call Management window on page 137 for more information) for instructions);
- with the help of the context menu command from the Quota tab in the Survey Properties view (see (go to Viewing and Modifying Survey Quota Settings on page 81 for more information) for instructions).

A disabled call can be enabled:

- when an appropriate scheduling rule is applied to that call(go to Specifying Scheduling Script Rules on page 224 for more information);
- with the help of the context menu command in the Call Management window (see (go to Enabling a call from a call list in the Call Management window on page 138 for more information) for instructions);
- with the help of the context menu command from the Quota tab in the Survey Properties view (see (go to Viewing and Modifying Survey Quota Settings on page 81 for more information) for instructions);
- from the Activate Call dialog window (as part of the Activate Call operation - see (go to Activating an Interview/call on page 149 for more information) for details);
- from the Edit Call dialog window (go to Editing a Call on page 144 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 121 for more information).
2. Choose the Scheduled view to display calls (go to Viewing the Interview/Call List on page 121 for more information).
3. Select the required calls in the call list, then right-click any selected call and choose Disable from the context menu that appears. In a submenu that appears choose the action that suits your needs: Selected Only, or the Entire List.

   This will display the operation progress dialog box. Depending on what particular action was selected it would be either for the Selected Only calls, or for Entire List (the picture below shows the dialog displayed when the action is executed for selected calls only).

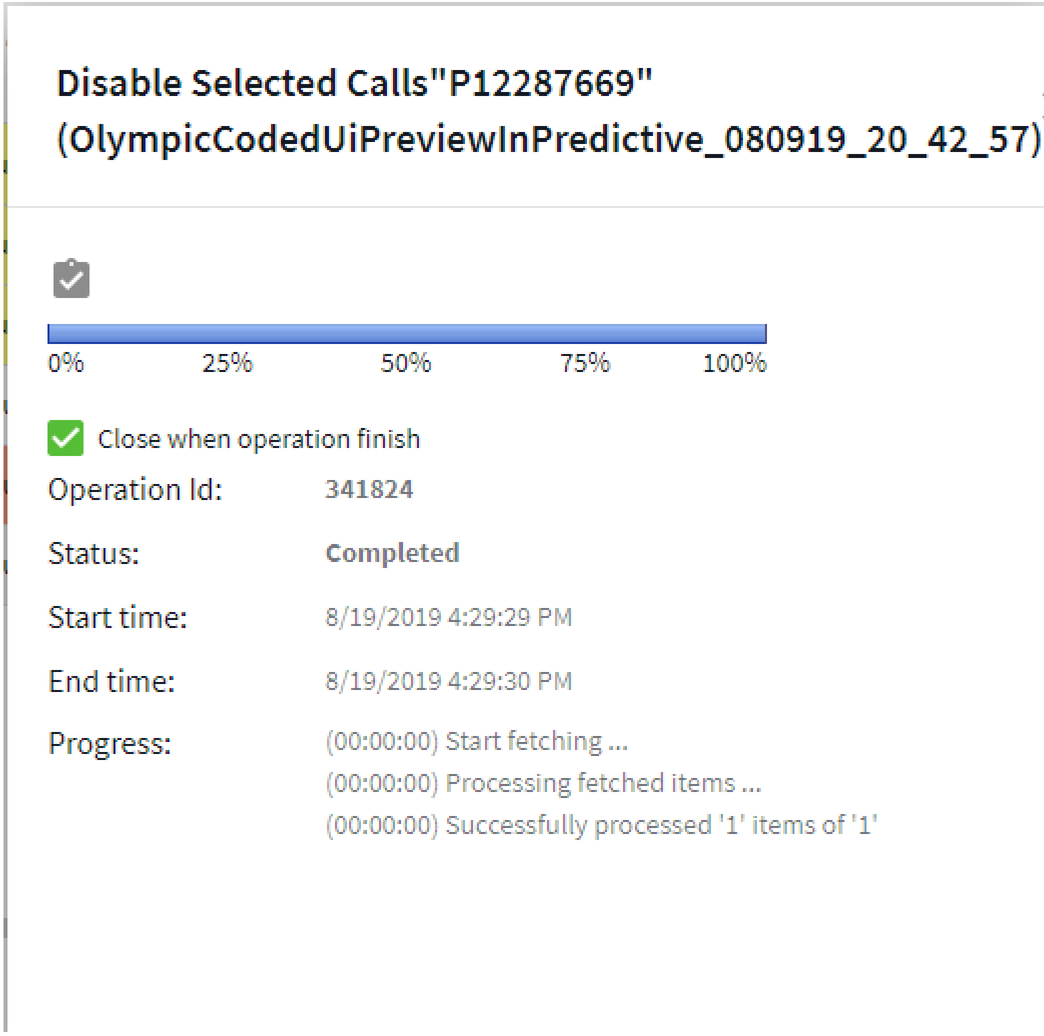


Figure 129 Disabling selected calls progress dialog

The dialog box shown above is similar to that used with the regular Activate, Enable and Disable operations. It shows the action summary and progress details. Refer to (go to Activating an Interview/call on page 149 for more information) for description of this dialog box.

4. Check the outcome of the Disable operation - it is indicated in the Progress field. In case of partial, or unsuccessful outcome follow the instructions contained in (go to Activating an Interview/call on page 149 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 121 for more information).
2. Choose the Scheduled view to display calls (go to Viewing the Interview/Call List on page 121 for more information).
3. Select the required disabled calls in the call list, then right-click any selected call and choose Enable from the context menu that appears. In a sub menu that appears choose the action that suits your needs: Selected Only, or Entire List.

   This will display the operation progress dialog box. Depending on what particular action was selected it would be either for the Selected Only calls, or for the Entire List (the picture below shows the dialog displayed when the action is executed for selected calls only).

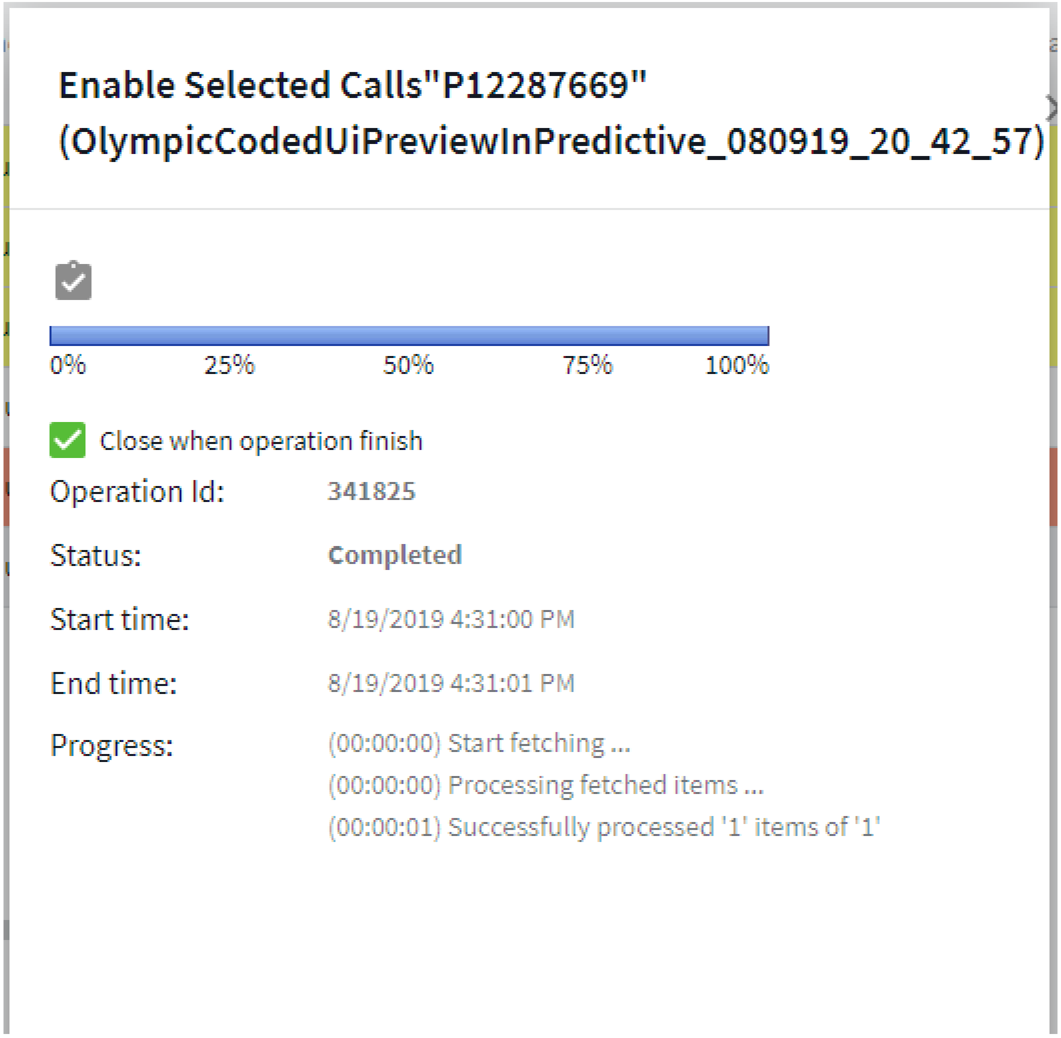


Figure 130 Enabling selected calls progress dialog

The dialog box shown above is similar to that used with the regular Activate, Enable and Disable operations. It shows the action summary and progress details. Refer to (go to Activating an Interview/call on page 149 for more information) for description of this dialog box.

4. Check the outcome of the Disable operation - it is indicated in the Progress field. In case of partial, or unsuccessful outcome follow the instructions contained in (go to Activating an Interview/call on page 149 for more information).

3.6.7. Working with Filters in the Call Management Dialog Window

While working in the Call Management dialog window 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 109 for more information).

3.6.7.1. Applying a Filter in the Call Management Dialog Window

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 you have to 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 particular survey questions for each interview/call in the list (these in fact are variables that are used to create questions in Confirmit Authoring by the survey author). This can be of help when you need to filter interviews/calls according to survey question (variable) values.

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 Confirmit Authoring, refer to the appropriate section in the Confirmit Authoring manual for instructions.

Added columns remain available in the Call Management dialog window even if it is closed and reopened again. Added columns remain available only until the current CATI Supervisor session is ended.

Variable columns are added with the help of the Add Question modal window.

To display question columns in the interview/call list:

1. Click the Add Question button  on the toolbar.

   This will display the Add Question modal window.

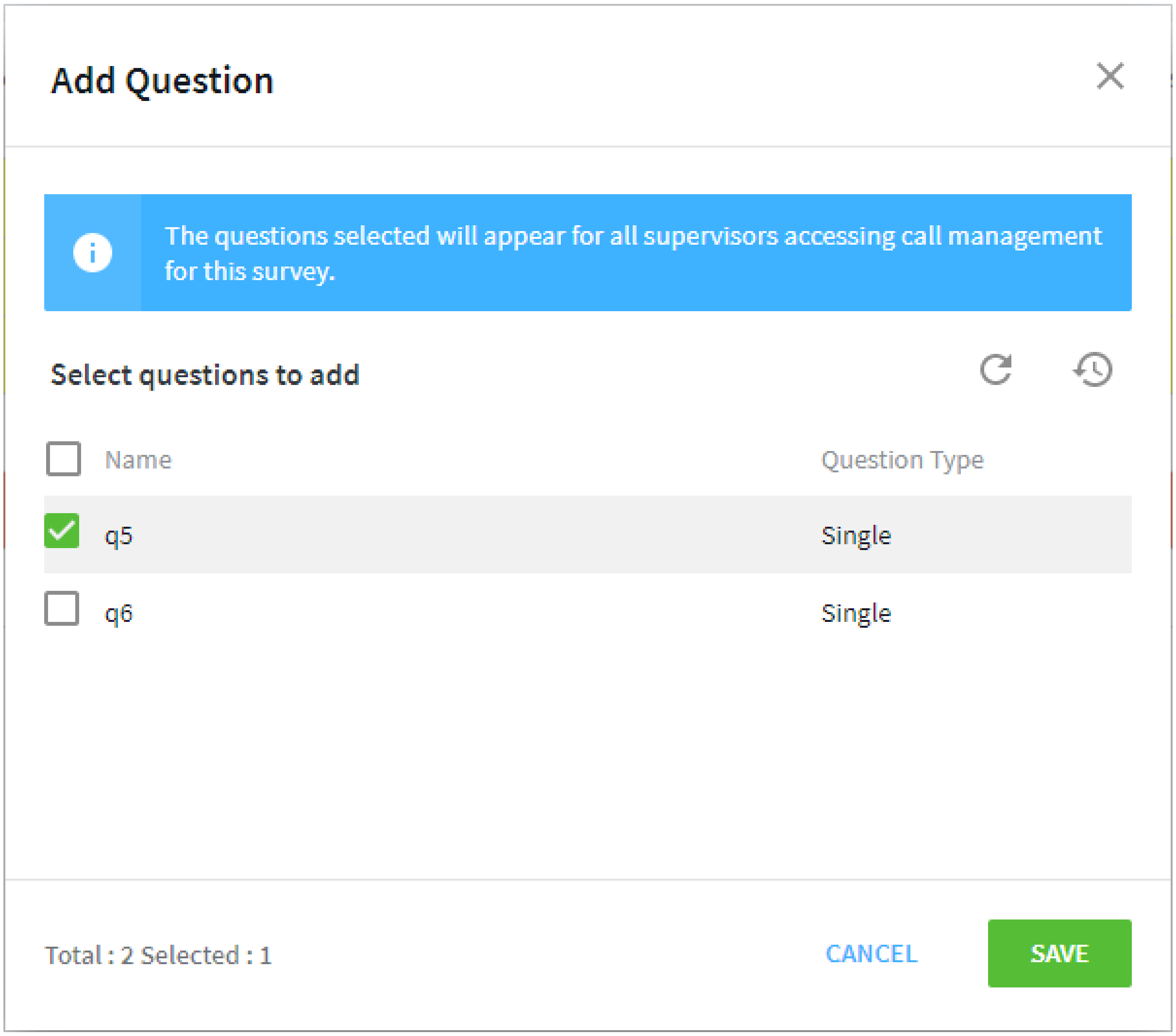


Figure 131 Adding a variable column with the help of the Add Question modal window

2. This modal window lists questions which are used in the current Confirmit survey and marked as "Available as CATI filter".
3. 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 in the leftmost column.
4. Click the Clear Selection button  above the grid to deselect all the selected questions at once.
5. Click the Refresh button  above the grid to display the most recent question list.
6. Click Save when you finish selecting questions. This will close the Select Questions modal window and refresh the interview/call list in the Call Management window. Columns displaying the selected question values are added to the interview/call list.

Added columns will remain available regardless of whether the Call Management window is closed and opened again.

Added columns will remain available until you finish your current session and close CATI Supervisor.

3.6.9. Modifying the Interview/Call Properties

You can modify a number of interview/call properties when it is required. These properties include:

- Extended Status
- Scheduled time
- Call priority
- Shift type
- Interview assignments

All of these properties are changed with the help of the dedicated dialog windows, which are displayed when you choose the appropriate command from the context menu.

Context menu commands can be executed for a single interview/call, or for a number of interviews/calls selected in the list.

Not all commands are available for all interviews/calls. Unavailable commands are greyed out in the context menu. The set of available commands depends on the state the interview/call is currently in.

Interviews/calls can be filtered by the State with the help of the State drop-down list located above the grid. When the certain state is chosen, the grid refreshes and displays only interviews/calls in the chosen state.

Some of the actions performed by executing such context menu commands (like Interview Assignments, or Shift type change) are also available in other dialog windows.

All mentioned context menu commands allow for instant modification of the selected properties of the particular interviews/calls.

3.6.9.1. Adding a Call

This command can be used to add a new or to modify properties of an existing call for any existing interview. The procedure is similar to the one that is used to edit the existing call properties, only in this case it also allows creating a new call.

Although this command is chosen from the context menu, it is performed not for the currently selected interview, but for any interview with the specified ID. Mind that if you specify a non-existent interview ID, the command will not be performed, and CATI Supervisor will warn you that a non-existent interview ID was specified.

To add a new call (or modify properties of any existing call):

1. This command can be performed for interviews in any state - Scheduled, Not Scheduled, or Active.
2. 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 Add New button + on the toolbar. This will display the Add Call dialog.

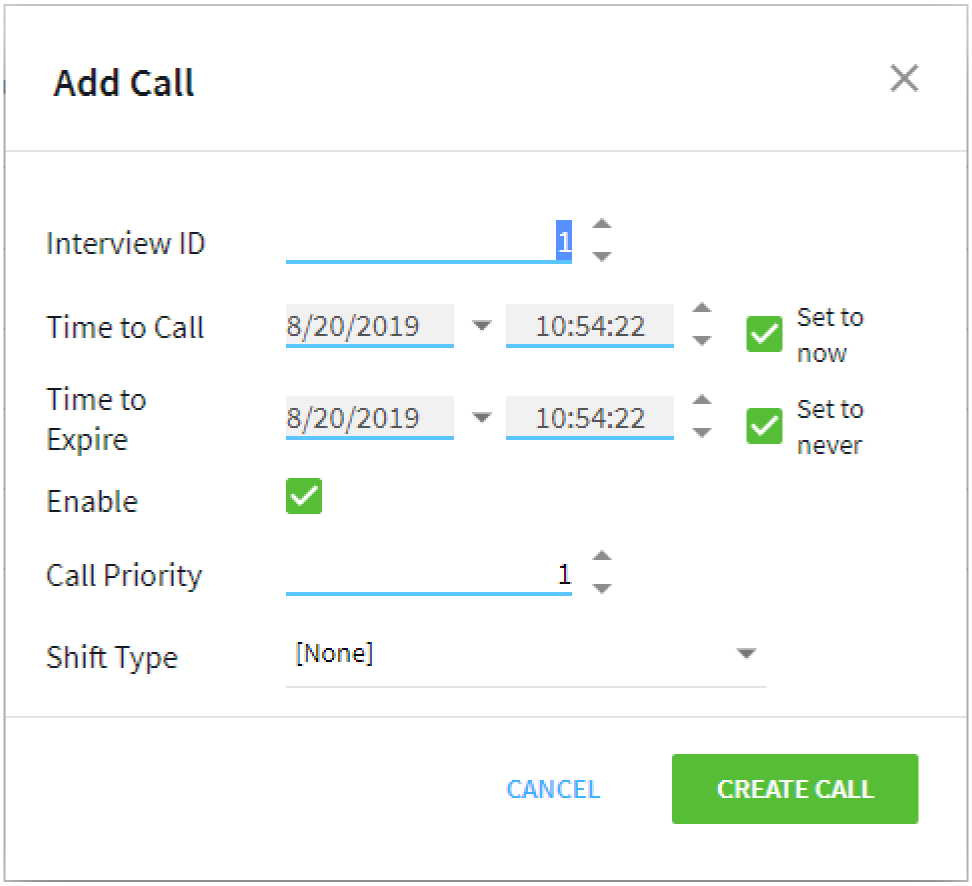


Figure 132 Adding/modifying the call properties

Here you can configure all call properties, except that it does not provide the way to assign the call to an interviewer/group.

3. Start with specifying the Interview ID. Using the Interview ID spin control select the ID of the existing interview.

Note that only a single call per interview can exist. Depending on the situation the Add New command either creates a new call, or modifies properties of the existing call. If an interview with the chosen ID does not have a call, the call will be created, and if this interview already has a call, this call properties will be updated.

If you specify a non-existent interview ID, the command will not be performed, and CATI Supervisor will warn you that a non-existent interview ID was specified.

4. You can specify whether the call would be created/updated like a "disabled", or "enabled" (regular) call. To create/update a call as "enabled" (regular) call check the Enable box. This is the default setting. To create/update a call as "disabled" call clear the Enable box.

   Refer to (go to Disabling and Enabling Calls on page 135 for more information) to learn more about call disabling and enabling.

Remember that disabled calls are never delivered to the interviewer until they are enabled.

5. Next configure other call properties. These include: call priority, shift type, time to call, and time to expire. These property configuration procedures can be found in (go to Editing a Call on page 144 for more information).
6. After all call properties are specified click Create Call to create a new call (or change the existing call properties). The created call (or a call with modified properties) will be assigned the Scheduled state.

3.6.9.2. *Editing a Call*

Using the Call Management dialog window 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 window.

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 window. 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 121 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.

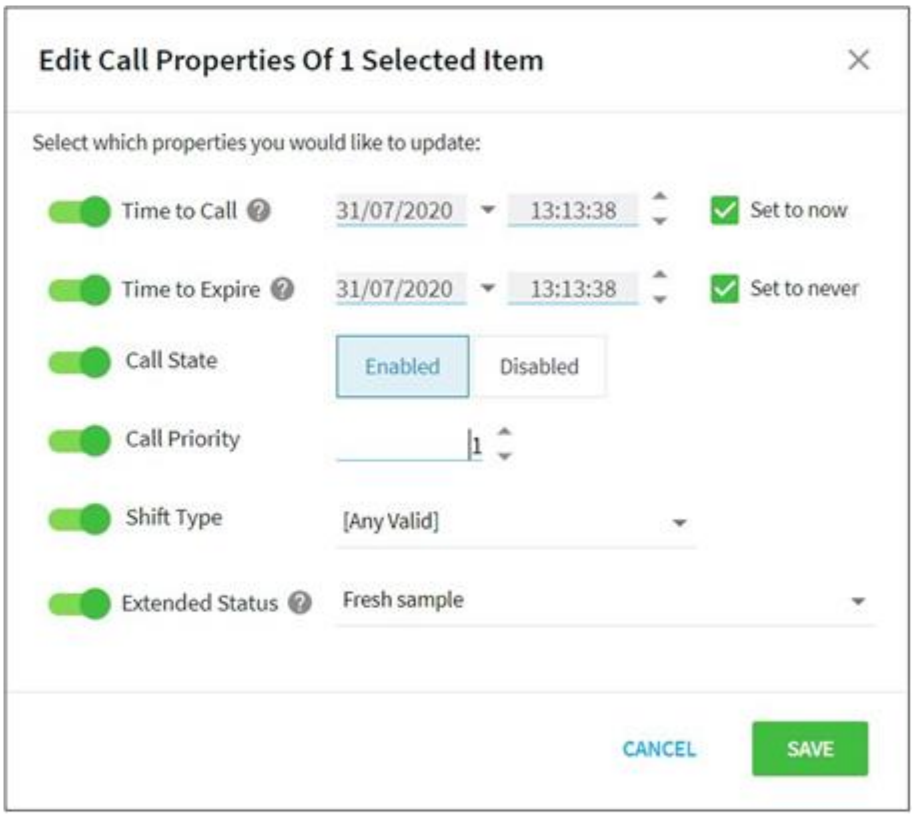


Figure 133 Editing call properties using the Edit dialog window

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 135 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 window is refreshed.

3.6.9.3. Deleting a Call

Using the Call Management dialog window you can delete any scheduled call which 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 (see (go to Viewing the Interview/Call List on page 121 for more information) for instructions).

   On the toolbar choose the Scheduled state in the State drop-down list.

2. Select the required call (or a number of calls) in the list.
3. 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 from the shortcut menu. This will delete all the scheduled calls.

   The CATI Supervisor will ask you to confirm the Delete operation by displaying the appropriate message box.

4. Click OK to delete the selected calls.

3.6.9.4. Moving a Call

You can modify an Extended Status of any interview. For example, this can be useful if you plan to repeat an interview. This is called moving a call. You can manually assign an Extended Status of your choice to the selected interview (or to a number of interviews at once), 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 (or any interview in the selected group), and choose Move Selected Only from the shortcut menu.

   Alternatively you can choose Move Entire List from the shortcut menu. This will execute the command for the whole interview list.

Choosing the command will display the Move… dialog window.

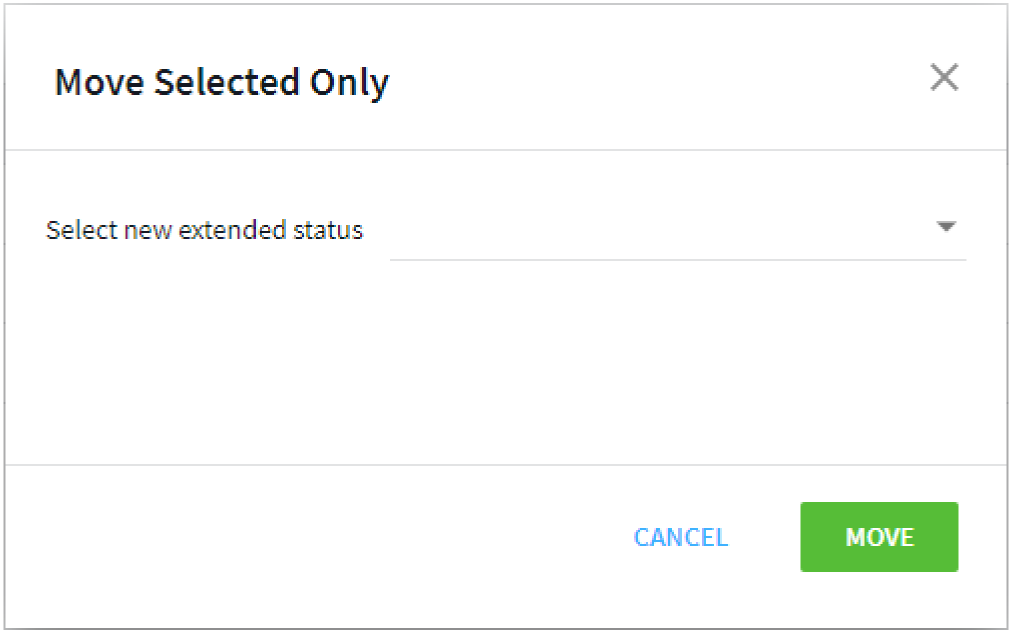


Figure 134 Move Selected Interviews Only dialog window

3. To move an interview into another Extended Status you should select a new Extended Status from the Extended Status drop-down list. Refer to (go to Appendix F - List of Predefined Extended Statuses on page 482 for more information) for the complete list of the Extended Status Codes.

4. Click Move to confirm the change. This window will close, and another one will be displayed. The window that appears next allows you to monitor the operation progress and outcome.

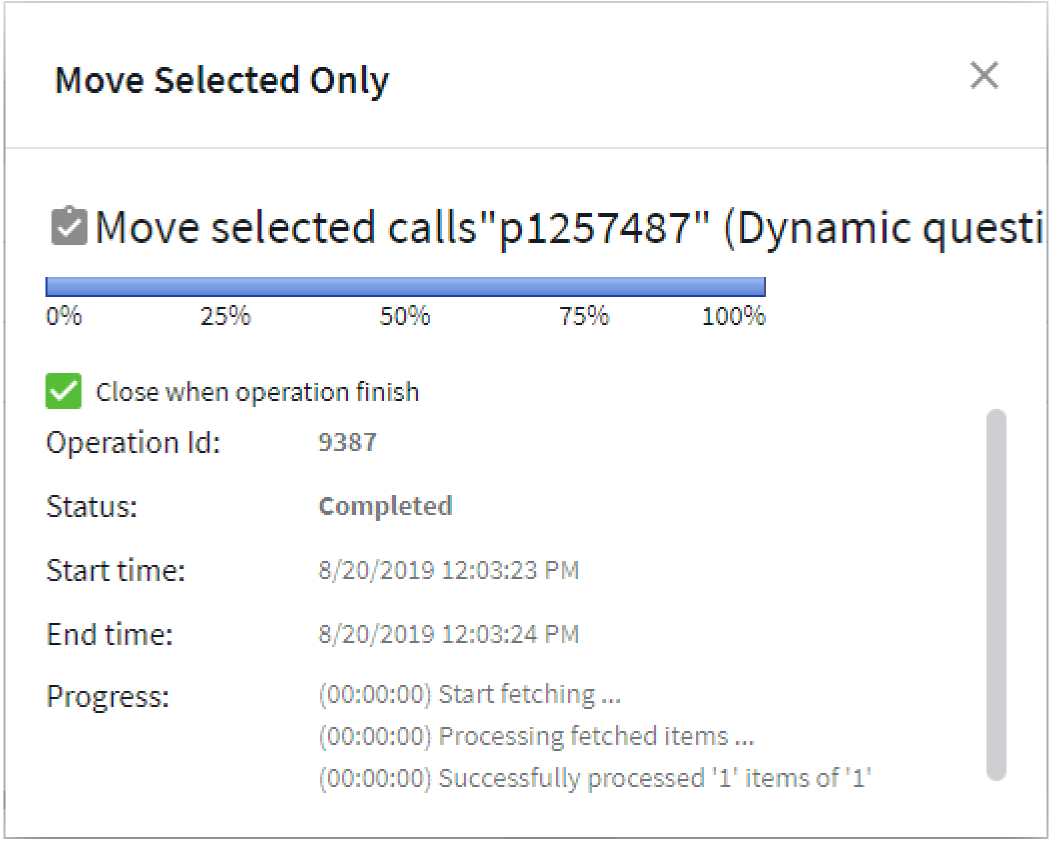


Figure 135 Move operation monitor window - operation completed successfully

The following information is displayed in this monitor dialog window.

- Progress bar - displays the percent of the processed records.
- **ID** - the Move operation ID;
- **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 failed to be moved)/ **"Complete"** (means all records were successfully moved)/ **"Failed"** (means all records failed to be moved);
- **Start time** - operation start time and date (uses the local timezone settings);
- **End time** - operation finish time and date (uses the local timezone settings);
- **Progress** - this field displays a dynamic content which describes the current operation state. Different messages inform you of the amount of currently processed records, summarize the operation outcome, describe errors if any occur in the course of the operation.

The picture above shows the monitor window displaying the finished operation summary details.

An operation may not finish successfully. The Progress field always shows a short verbal operation summary upon operation finish. The following unsuccessful outcomes are possible:

- partially completed operation;
- failed operation (an error has occured).

Note that the Move operation is assigned the "Failed" status only when ALL selected records could not be moved to the specified extended status.

What you should do when you get an error message (both for "Partially completed", or for "Failed" status). First, retry an operation. If an error persists, there is nothing else you can do. Since the Move operation does not assume any other parameter than the New extended status to be set, the error cause definitely lies out of your reach. You should contact the support team to find a solution in such case.

By default the "Close when operation finishes" box is checked, and this window automatically closes when operation is finished. Clear this box if you want to keep this window displayed after that. Message displayed in the Progress field can help you analyze the operation outcome.

4. In case you have cleared the Close when operation finishes box, you have to close the operation monitor window by pressing the Close button. Otherwise the window closes automatically. When the Move operation finishes, the interview list in the Call Management dialog window refreshes, and selected interviews/calls are moved to the specified statuses.

3.6.9.5. Moving and Rescheduling an Interview

You can modify an Extended Status of any interview and simultaneously run the scheduling script associated with the current survey.

Note that this operation does not necessarily schedules the interview immediately – it only runs the appropriate scheduling script.

If you try executing this command for a call that is currently delivered to an interviewer, and is in progress at the moment, 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 window 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 (or any row in the selected interview group), and choose Move And Reschedule Selected Only from the shortcut menu.

   Alternatively you can choose Move And Reschedule Entire List from the shortcut menu. This will execute the command for the whole interview list.

   Choosing the command will display the Move… dialog window.

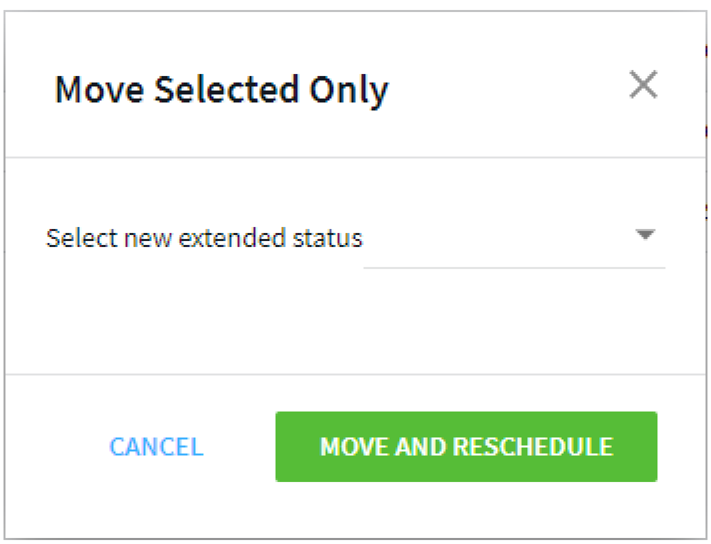


Figure 136 The Move and Reschedule modal window

3. To move an interview into another Extended Status and reschedule it you should select a new Extended Status from the Extended Status drop-down list. Refer to (go to Appendix F - List of Predefined Extended Statuses on page 482 for more information) for the complete list of Extended Status Codes.

4. Click Move to confirm the change. This window will close, Extended Status will be modified, and the appropriate scheduling script will be run. The interview list in the Call Management dialog window will be refreshed.

   Newly assigned Extended Statuses will be displayed in the list in the Extended Status column.

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.

When you start the Move and Reschedule action for a number of interviews/calls that exceeds one thousand, CATI Supervisor displays the following warning message:

"A maximum of 1000 respondents can have "Move and Reschedule" performed in a single action. More than 1,000 respondents are selected, so the procedure will be performed only on the first 1000 respondents listed. Do you want to continue?"

Choosing Move will execute the action for one thousand interviews/calls only. To move and reschedule the rest of the interviews/calls you have to repeat the procedure. Again, mind that this action can be executed for only one thousand interviews/calls at once.

3.6.9.6. Activating an Interview/call

You can modify an interview's scheduling parameters. To 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 activating 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 154 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. No other combination is allowed.

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** from the shortcut menu.

   Alternatively you can choose **Activate the Entire List** from the shortcut menu. This will execute the command for all interviews which are included in the list.

   When the **Activate...** command is chosen, the confirmation dialog is displayed. Confirm the action by choosing **Yes** to proceed with the activation procedure.

   The appropriate **Activate** modal window is displayed next.

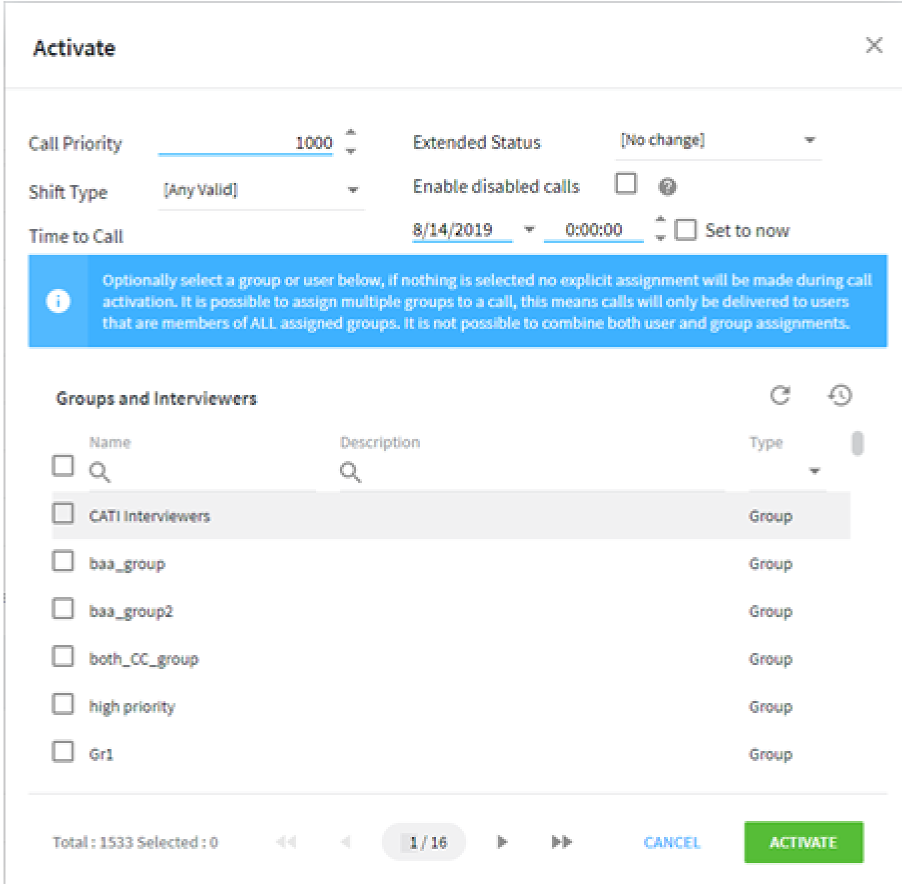


Figure 137 Activate dialog window

3. Using this dialog window you can modify the following interview/call properties:

- call priority
- shift type
- extended status
- time to call
- interviewer / interviewer group assigned to this call
- and you also get the ability to enable the disabled calls as part of the activation process in case the affected interviews include the disabled ones.

4. Modify the priority of a call using the **Call Priority** spinbox; click the **Up** or **Down** spin arrows to increase or decrease the value by one, 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 for this option 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 (the Extended Statuses parameter on the General tab of the Survey View

7. Time to Call indicates the starting moment (particular date and time) of the period when the call should be delivered to the interviewer. It is set with the help of the calendar form (invoked 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 forcibly start the call delivery procedure the moment the **Activate** button is pressed.

8. In case one or more calls you are going to activate is disabled you may need to enable them (please read (go to Disabling and Enabling Calls on page 135 for more information) for more information on the enabled and disabled calls).

   To do this check the Enable disabled calls box. This will enable all the disabled calls that are to be activated as part of the activation process. By default this box is cleared, and all disabled calls are not enabled if it remains unchecked.

Remember that disabled calls could be activated as well as enabled calls, but disabled calls are never delivered to the interviewer until they are enabled.

9. 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.

10. Note that an extra interview/call property check is performed as part of an activation procedure in case the quota controlled call delivery is turned on in Confirmit Authoring.

    In case a quota is defined and enabled for the survey in Confirmit 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.

    For 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 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 such case this call remains in the "Not scheduled" list.

    Note that all calls that were "not activated" due to the above described 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 the next step below).

11. Click **Activate** to confirm interview/call property changes. The Activate… dialog window will close, and the Activate... progress dialog will be displayed.

    The CATI Supervisor will cancel Activation operation for any type of selection which is not supported and will display the appropriate warning message explaining the reason for canceling the action. For example, if you try activating an interview for a combination of groups and persons, the following warning message is displayed.

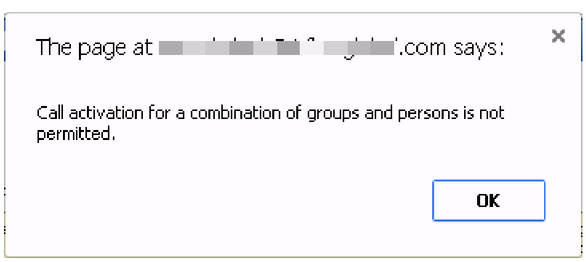


Figure 138 Warning message displayed when a wrong selection is made

Click OK to close the message. No interviews are activated after that. Create a valid selection and repeat the Activate.. action.

Monitoring the operation outcome

This and a number of similar operations can involve processing of a large number of records. Potential errors may prevent the operation from being completed. The CATI Supervisor provides a tool that helps you to estimate the operation outcome. This is the monitor window that shows the main information regarding the performed operation.

The monitor window (see the picture below) allows you to monitor the operation progress and outcome.

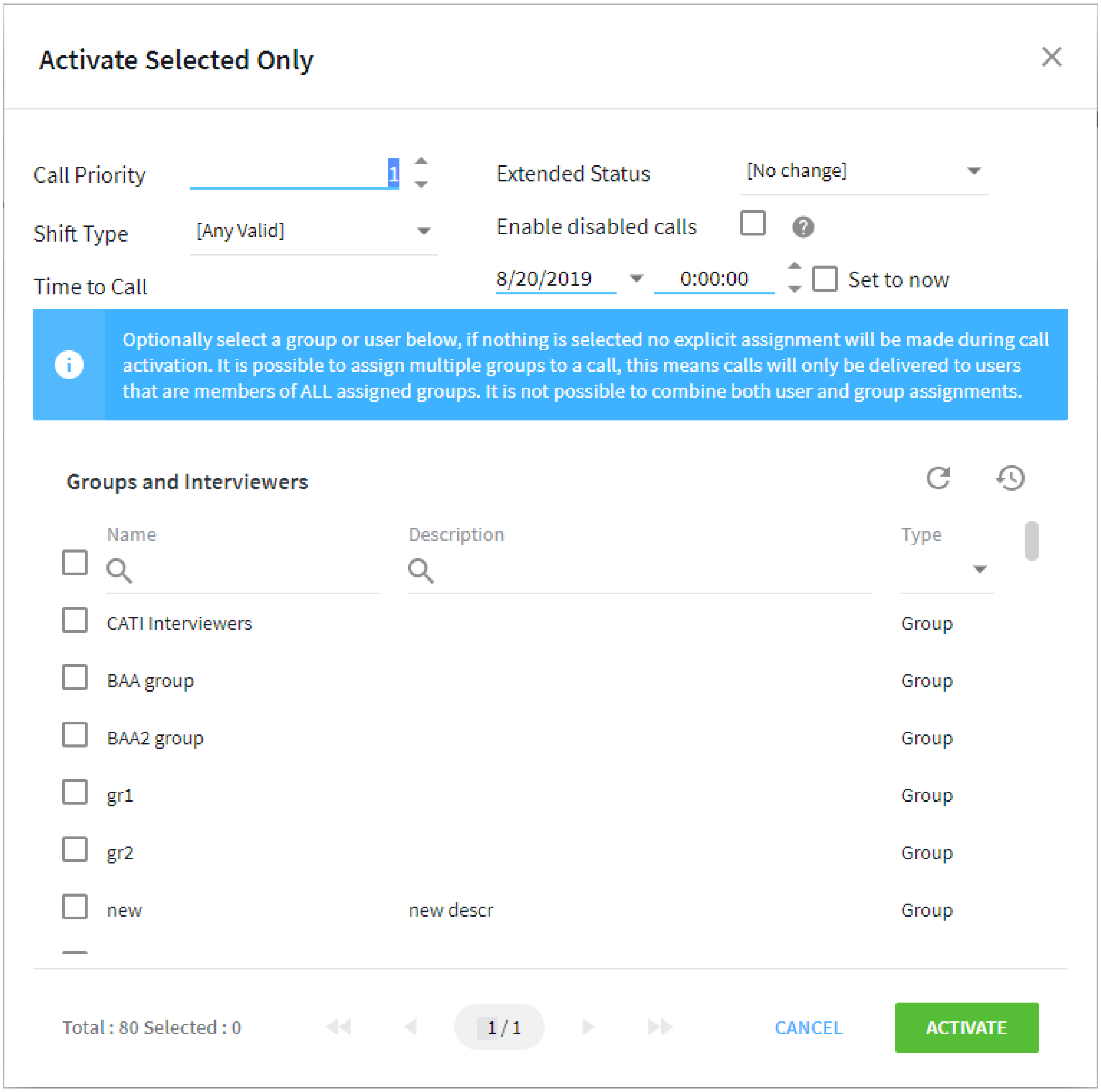


Figure 139 Activate operation monitor window - operation completed successfully

The following information is displayed in the monitor dialog window.

- Progress bar - displays the percentage of the processed records.
- **ID** - the Activate operation ID;

- **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 failed to be activated)/ **"Complete"** (means all records were successfully activated)/ **"Failed"** (means all records failed to be activated);
- **Start time** - operation start time and date (uses the local timezone settings);
- **End time** - operation finish time and date (uses the local timezone settings);
- **Progress** - this field displays a dynamic content which describes the current operation state. Different messages inform you of the amount of currently processed records, summarize the operation outcome, describe errors if any occur in the course of the operation.

  The picture above shows the monitor window displaying the finished operation summary details.

  The picture below shows the monitor window displaying information regarding the operation in progress.

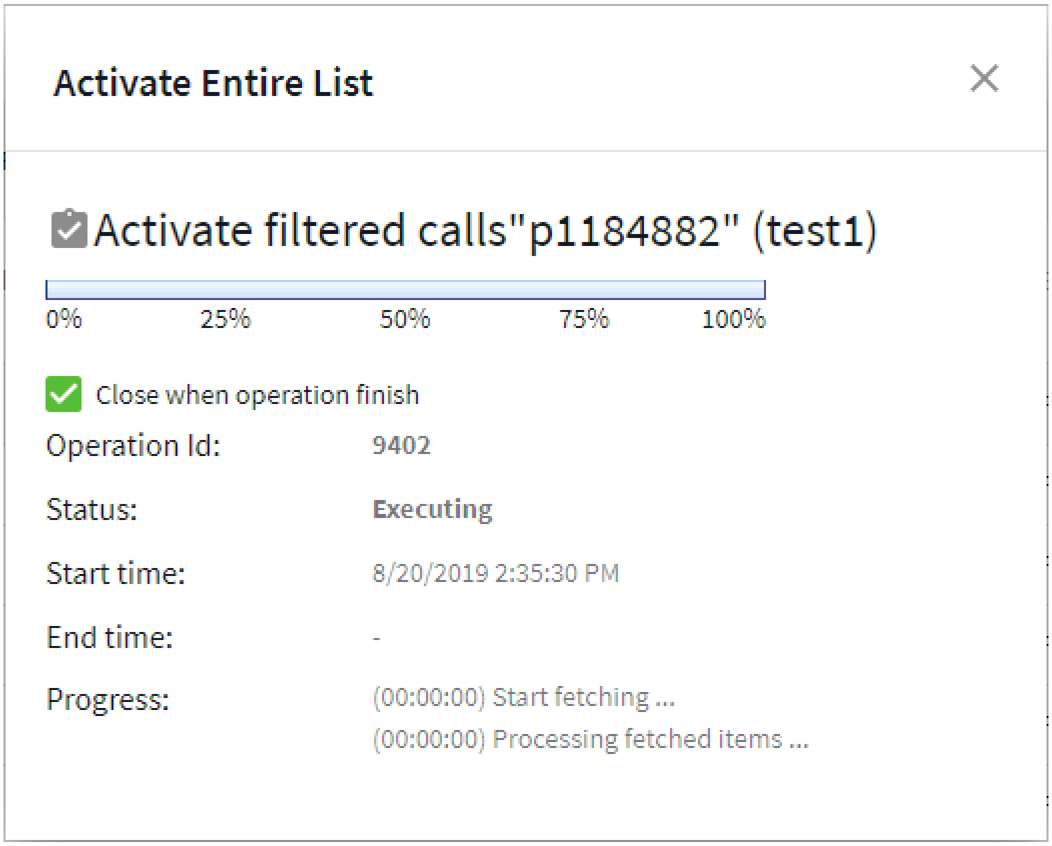


Figure 140 Activate operation monitor window - operation in progress

An operation may not finish successfully. The Progress field always shows a short verbal operation summary upon operation finish. The following unsuccessful outcomes are possible:

- partially completed operation;
- failed operation (an error has occurred).

  Note that the Activate operation is assigned the "Failed" status only when ALL selected records could not be activated.

What you should do when you get an error message (both for "Partially completed", or for "Failed" status). First, it is a good idea to re-check the operation parameters. For example, Activate operation may fail if the specified time falls out of bounds of the selected shift type. If any parameter of the Activate operation proves to be incorrect, change it, and then retry an operation. If an error persists, you should contact the support team to find a solution.

By default the Close when operation finishes box is checked, and this window automatically closes when operation is finished. Clear this box if you want to keep this window displayed after that. Message displayed in the Progress field can help you analyze the operation outcome.

11. In case you have cleared the Close when operation finishes box you have to close the operation monitor window by pressing the Close button. Otherwise the window closes automatically after a while. When the Activate operation finishes, the interview list in the Call Management dialog window is refreshed, and selected interviews/calls are activated.

3.6.9.7. Multiple Group Assignments

There is an opportunity to assign calls only to persons who are included in a number of specified groups. Such condition, for example, may mean that a person who is a member of both Expert and English groups is bound to receive calls that have the following assignment: Expert Group AND English Group.

Note that Multiple Group Assignment (when there are two or more groups specified in the assignment) DOES NOT ACTUALLY mean that this call is assigned to these groups of interviewers. In fact such Multiple Group Assignment means that ONLY PERSONS BELONGING TO ALL GROUPS INCLUDED INTO THE ASSIGNMENT will receive calls with this Multiple Group Assignment. If a call is assigned to Group1 and Group2 then persons who belong only to Group1 or to 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 149 for more information).
- Call assignment(go to Assigning a Person/Group to a Call on page 156 for more information)
- By way of specifying such assignment in the loaded sample (refer to the Confirmit Authoring documentation for description of the sample file format used for loading sample data into the Confirmit 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" (see (go to Specifying Scheduling Script Rules on page 224 for more information) and (go to Appendix A - Action Parameter Descriptions on page 472 for more information) for the list of actions).

Multiple Group Assignment works with any dialing mode.

In case 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.

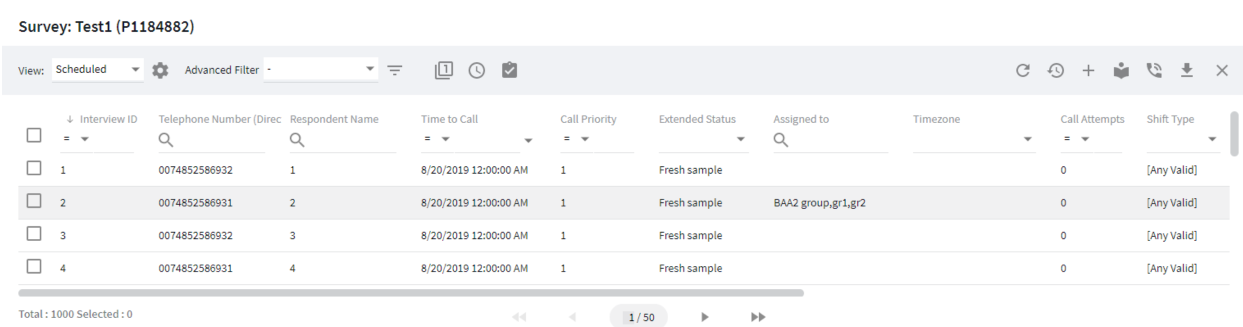


Figure 141 Interview with ID 2 has a Multiple Group Assignment

If you are going to create group assignments by way of uploading a sample file to the Confirmit Authoring server you should check for the following. The sample file should contain a column with the group IDs - a comma separated list for each call you want to assign to multiple groups. Note that if only one group ID specified in the sample happens to be incorrect the whole multiple assignment operation is canceled. Refer to the Confirmit Authoring manual for details concerning the sample file format and upload procedure.

Note that if at least one group which was used in Multiple Group Assignment specification is deleted, this Multiple Group Assignment is deleted automatically. After such group has been deleted the CATI Supervisor module displays a message informing user of the fact 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.

To change a call priority:

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 (or click the required items while holding down Ctrl or Shift keys on the 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.

   Choosing the command will display the appropriate Change Priority… modal window.

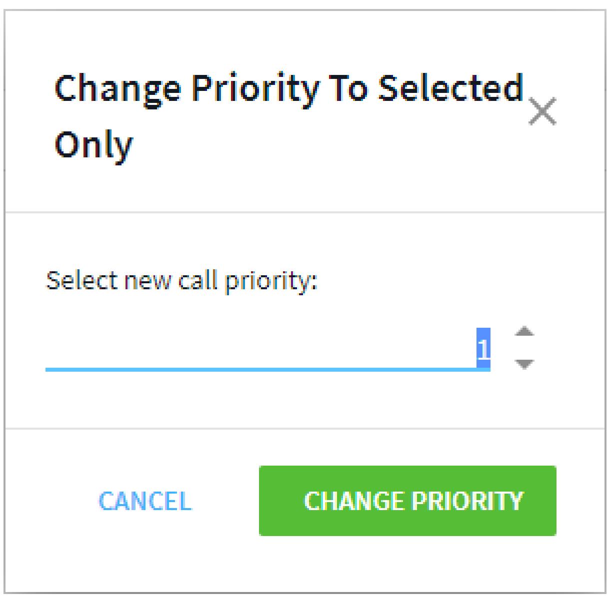


Figure 142 Changing Priority of a call

4. To change a call priority you should select a new value using the Call Priority spinbox.
5. Click Change Priority to confirm the change. This window will close, and the call priority will be modified. The interview list in the Call Management window will be refreshed.

3.6.9.9. Changing the Shift Type for a Call

You have an option of changing the shift type already assigned for a call.

This command can be executed only for the scheduled calls.

To change the shift type for a call:

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 (or click the required items while holding down Ctrl or Shift keys on the 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 from the shortcut menu. This will execute the command for the whole call list.

   Choosing the command will display the appropriate Change Shift Type… dialog window.

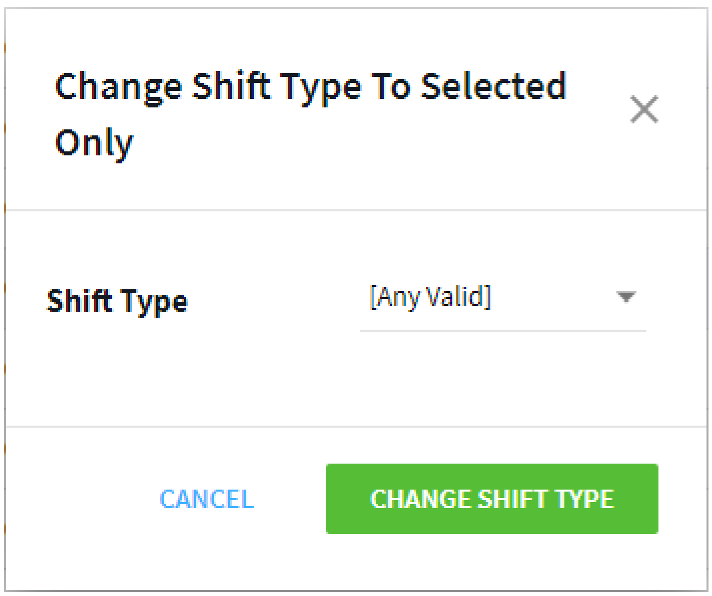


Figure 143 Change Shift Type dialog window

4. To change a shift type for a call you should select a new value from the Shift Type drop-down list.
5. Click OK to confirm the change. This window will close, and the shift type will be modified. The interview/call list in the Call Management dialog window will be refreshed.

3.6.9.10. Assigning a Person/Group to a Call

You have an option of assigning an interviewer/group to a call. This way you can also change the assignment if it already exists. This command can be executed only for the "Scheduled" or "High Priority" calls. You can create an assignment to a single call or to a number of calls simultaneously. A special assignment type allows assigning calls only to persons who belong to specified groups. This type of assignment is called a "Multiple Group Assignment", refer to (go to Multiple Group Assignments on page 154 for more information) for details. Note that a new assignment REPLACES the old one - if an assignment has already been made for a call it will be COMPLETELY REPLACED after a new assignment is made for the same call. The following assignment types are possible:

- for a single person
- for a single group

- for a selection of groups.

No other combination is allowed. To assign a person/group to a call:

1. From the State drop-down list in the Call Management window choose the Scheduled or High Priority state. This will display only calls in the corresponding states.
2. Select the required call (or a number of calls) in the list.
3. Right-click the selected call (or any call in the selected group), and choose "Assign to Selected Only" from the shortcut menu.

   Alternatively you can choose "Assign to Entire List" from the shortcut menu. This will execute the command for the whole call list.

   Choosing the command will display the appropriate Assign to… dialog window.

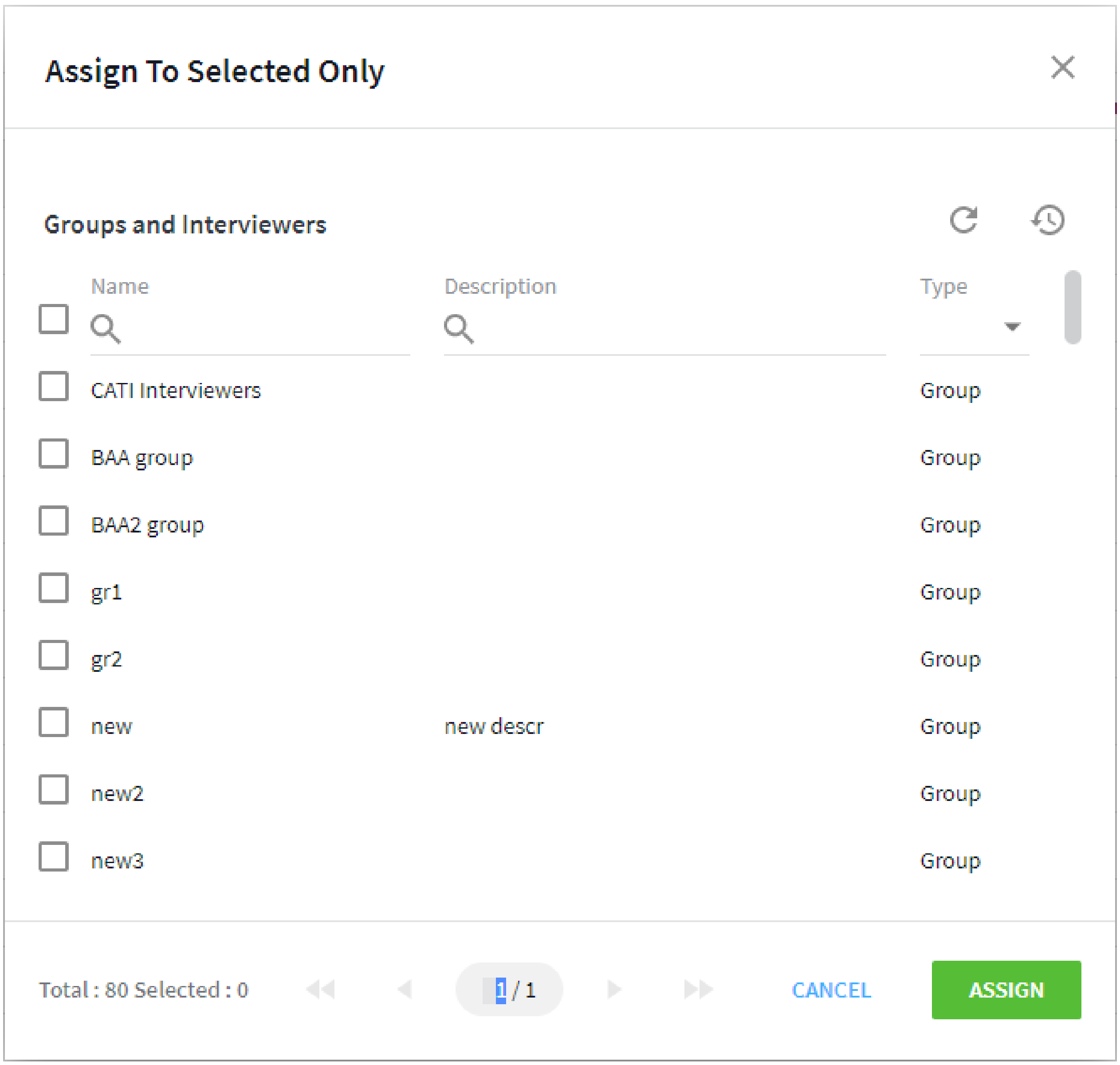


Figure 144 Assign to a Call dialog window

4. To assign an interviewer/interviewer group to a call you should select the required interviewer/interviewer group from a list of Groups and Interviewers. Selection is performed by checking an appropriate box (or a number of boxes in case of a multiple selection).

5. Click Assign to confirm the change. This window will close, and the assignment will be modified. The interview/call list in the Call Management dialog window will be refreshed, and a new assignment will be displayed in the Assigned to column.

   The CATI Supervisor will cancel assignment operation for any type of selection which is not supported and will display the appropriate warning message explaining the reason for canceling the action. For example, if you try assigning a call to a number of persons or to a combination of persons and groups, the following warning message is displayed.

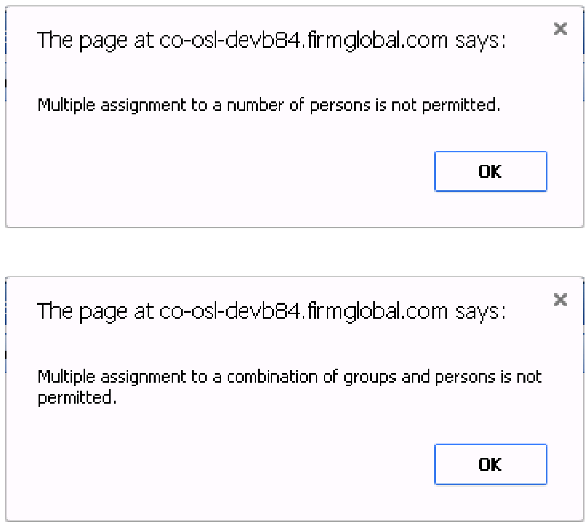


Figure 145 Warning messages displayed when a wrong selection is made

Click OK to close the message. No assignment is created after that. Make a supported selection and repeat the Assign.. action.

This and a number of similar operations can involve processing of a large number of records. Potential errors may prevent the operation from being completed. The CATI Supervisor provides a tool that helps you estimate the operation outcome. This is the monitor window that shows the main information regarding the performed operation. Refer to (go to Monitoring the operation outcome on page 151 for more information) section for description of this window.

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 (see (go to Dialer on page 359 for more information) for description of the dialing modes), you can choose the dialing mode for any particular interview, and either set it to "Preview", or leave this parameter as it is.

After the dialing mode had been changed to Preview you can reset it, and set the Predictive mode for the required interviews once again.

Note that this is only one of the three possible ways to choose dialing mode for an interview when the survey is in the Predictive mode. You can use alternative ways to change the dialing mode in this case - refer to (go to Dialer on page 359 for more information) for complete description of the procedure.

To change the dialing mode for interviews from the Call Management window

1. Display the Call Management window for the required survey which is set to the Predictive mode.

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.

3. Notice that the Dial Mode column in the Call Management window shows Preview for these interviews. The Dial Mode column remains empty for interviews which were not set to the Preview mode (these interviews will be delivered in the Predictive mode, which is set for the whole survey).
4. You can return any interview which was once set to the Preview mode back into the Predictive mode. Again, select the required interviews in the Call Management window, right-click the selection, and choose Reset Dialing Mode for the appropriate range (the entire list, or selected only).

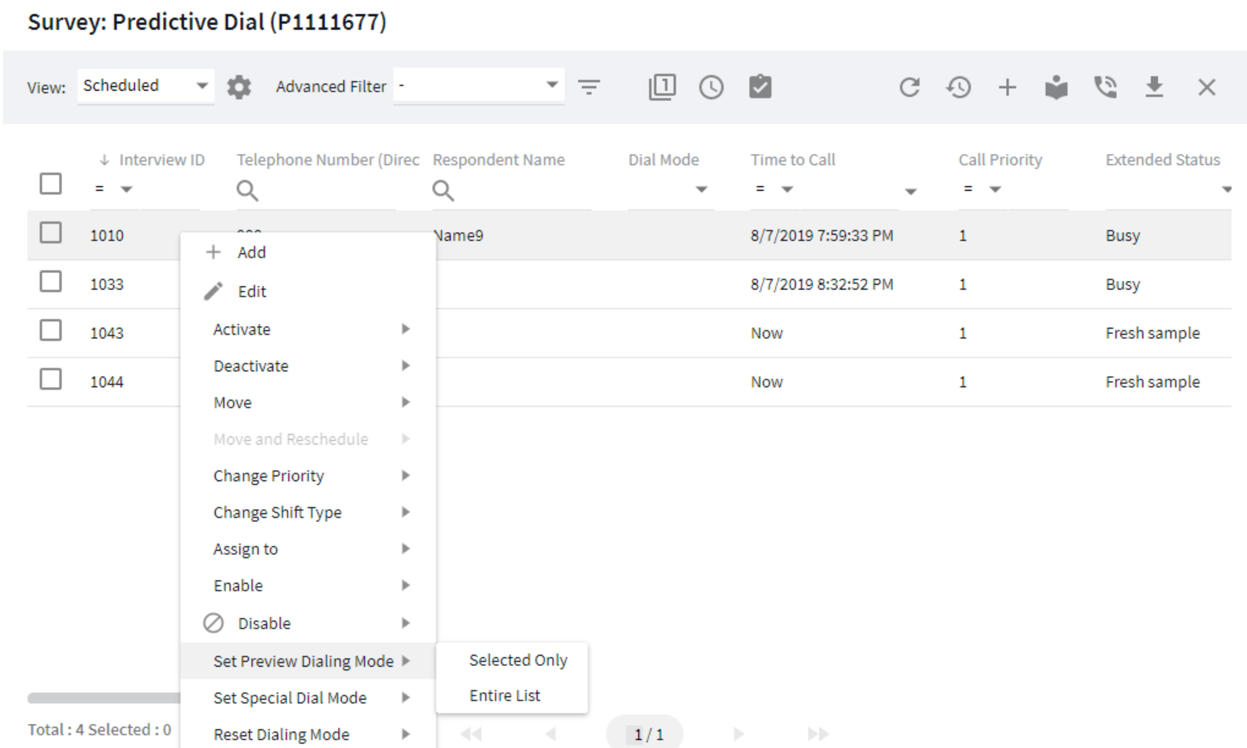


Figure 146 Choosing the dial mode in the Call Management window

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 set 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.

Keep in mind that you may encounter two possible situations: the first does not require any action from the supervisor - the dialing mode is automatically set for the required interviews in the uploaded sample (this type of task is carried out in the Confirmit Authoring module).

The other possible situation requires the supervisor's input. This happens when the uploaded sample does not contain indication of the dialing mode. In such case the supervisor should follow the instructions below.

Be aware that changing the dialing mode does not alter other properties of the call.

To set up the Special dialing mode for an interview

1. Display the Call Management window for the required survey which is set to the Predictive mode.
2. Right-click the required interview (or select a number of interviews) and choose Set Special Dial Mode. This operation can be performed either for the selected interviews only, or for the entire list.

3. Notice that the Dial Mode column in the Call Management window shows Special Dial for these interviews.
4. You can reset the Special Dial mode you have set to the originally set dialing mode at any time. Again, select the required interviews in the Call Management window, right-click the selection, and choose Reset Dialing Mode for the appropriate range (the entire list, or selected only). The affected interviews/calls will then display no custom setting in the Dial Mode column (so the default dialing mode, Predictive will be assumed)..

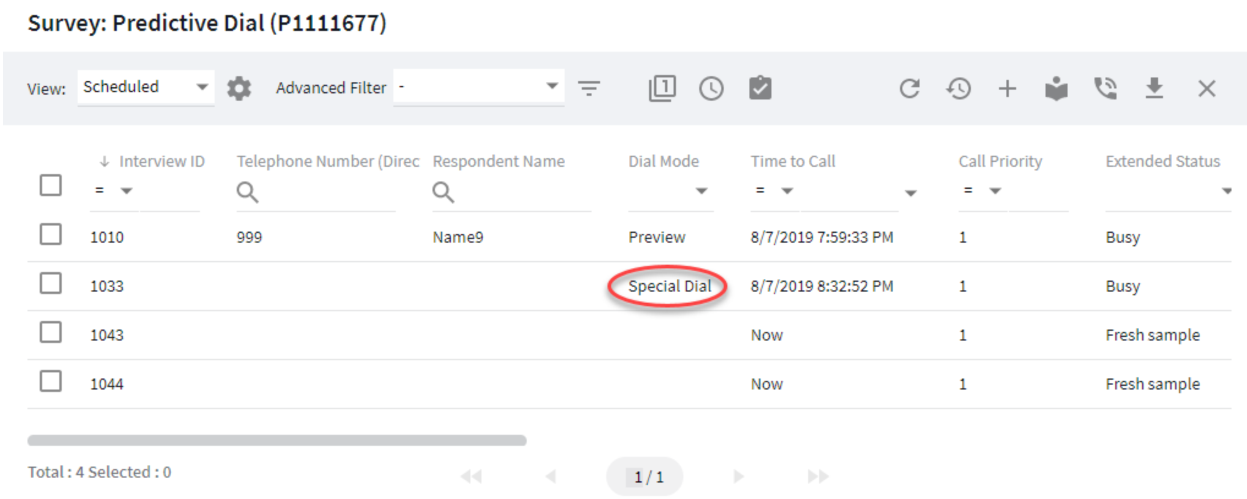


Figure 147 A call with the Special Dial mode set up in the Call Management window

3.6.10. Reviewing Interviews with the Reviewer Application Module

The CATI Supervisor provides a convenient quality control module called Reviewer which lets supervisors 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 into a review session, open the created session for review and 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.

To perform reviewing of interviews a supervisor has to be granted a relevant permission. The required permission is enabled by default for a CATI supervisor. A Confirmit system administrator can revoke this permission upon request.

The Reviewer module supports editing of all types of questions that are used to design surveys in the Confirmit Authoring module.

Any interview question can be played back (see (go to Playing back a question on page 172 for more information)). When user starts playback of the particular question they are provided with functionality similar to that used for deferred monitoring (see (go to Deferred Monitoring in CATI Supervisor on page 334 for more information) for details regarding this functionality).

You can start your work in the Reviewer module either by creating a new "session" (see (go to Creating a Review Session on page 161 for more information) for information), or by viewing the list of existing "sessions" (see (go to Viewing the List of Review Sessions on page 162 for more information) for information). A ‘session’ in the Reviewer terms 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 (see session properties description in (go to Working with the Session Overview Page on page 182 for more information)).

Supervisor can stop working in the Reviewer module at any point as any changes are automatically saved when supervisor moves from one cell to another or to the next interview record in the session. If any question is left not reviewed, or if the supervisor has intentionally marked a question as "Not Reviewed" this fact is reflected in the status that this session receives. The supervisor can return to any session and either resume outstanding work or reopen a completed session for further review work.

The user interface of the Reviewer module lets you switch between all the mentioned views. Refer to section topics listed below for information.

3.6.10.1. Creating a Review Session

To start reviewing interviews you have to create a session first. A review session is created in the Call Management window. A session is a container, a process unit that contains a sequence of interviews that will be delivered for review in succession 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 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 interviews you wish to review. Right-click the selection and choose **Review/Selected only** from the context menu that appears. This will include only selected interviews into the created review session. Alternatively you can choose to create a session using all of the interviews that are currently contained within the applied filter to do this choose **Review/Entire list** from the context menu.
2. A review session is created automatically and is opened in the Reviewer module for review. The Reviewer module is opened and the review session created is displayed on the Review Session page. This means you can start reviewing the created session right away.

   Refer to (go to Reviewing an Interview on page 169 for more information) for instructions on how to perform the review.

To create a session without opening it

In some scenarios a supervisor might wish to allocate some interview records to a review session but not actually perform the reviewing work right away or 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 interviews you wish to review. Right-click the selection and choose "Review Session/Selected only" from the context menu that appears. This will include only selected interviews into the created review session. Alternatively you can choose to create a session using all of the interviews that are currently contained within the applied filter to do this choose "Review Session/Entire list" from the context menu.
2. In the dialog box that appears next you can edit the session name - it will contain the user name, the survey name, time and date stamp (see the picture below). Choose **OK** to create the session.

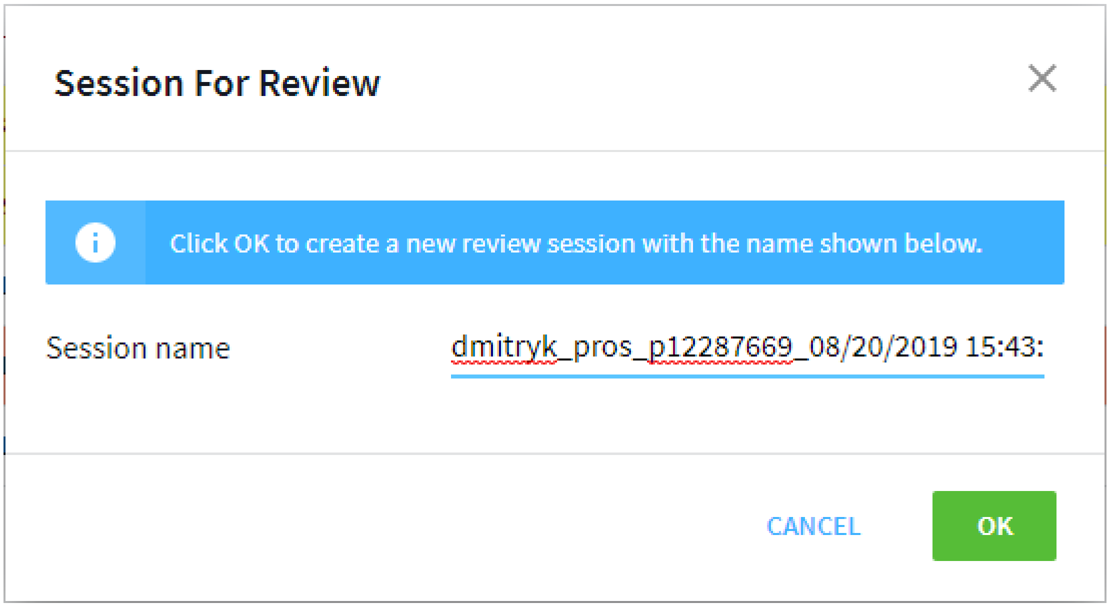


Figure 148 Creating a session - start with the session name

3. The next dialog box provides a link which any user who is authorized to access the Reviewer module can use to begin work in the Reviewer module (see the picture below). Save the link however you wish simply skip it if you are not going to save it. Choose Close in this dialog to close it and return to the Call Management window.

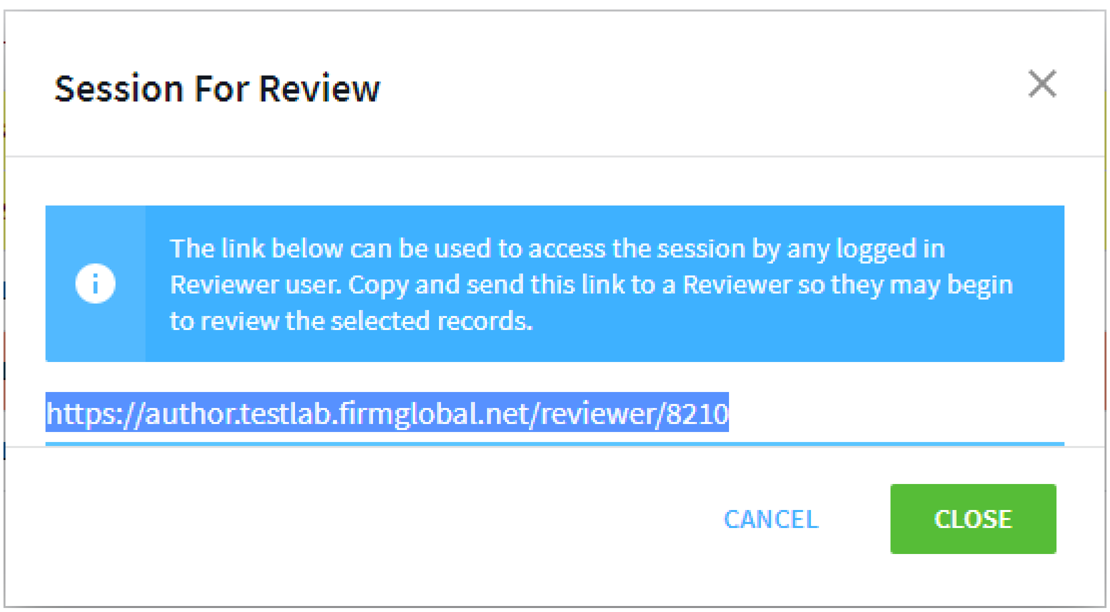


Figure 149 Creating a session - save this link to provide it to a person who will perform the review

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 you need to run the Reviewer module. This module starts in a separate browser window.

Note that when the session is deleted it is removed from this list and this action cannot be undone.

The user interface of the Reviewer module in the Session List view lets you 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. This will open the Reviewer module in a separate browser window and display the Session List.

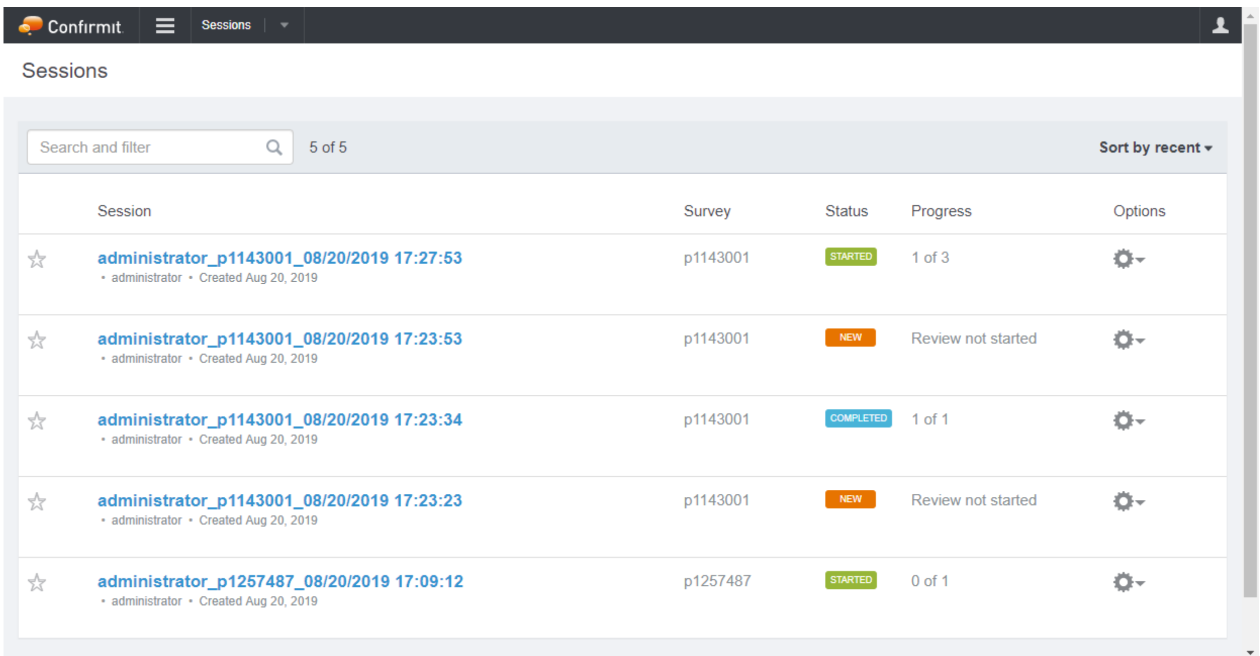


Figure 150 The list of sessions displayed in the Reviewer module

The list presents session information in columns.

The leftmost column contains the Favourite mark. Click the blank star shape to add a session to your Favourites list - it will turn orange to indicate the session is added to the list of favourites. You can later sort the list to bring up the favourite sessions.

The Session column contains the session name. You can open a session by clicking its name in the Session column.

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 review. The following statuses can be assigned to a session:

- New - means the session was created but no answers were viewed or edited at all;
- Started - means some answers were viewed/edited;

- Completed - means a supervisor went through all available answers although some may have been intentionally skipped or left without a review (marked as "Not reviewed", see for explanation).

  The Progress column shows how many answers from the available were actually reviewed during the session.

  The Options column provides a control which allows performing the following operations with the session:

- Review - open session for review with questions that were selected the last time it was opened;
- Rename session - change the name of the session which is currently displayed in the Session column;
- Overview - browse the session overview;
- Delete - delete the current session;
- Complete - complete the session. This operation asks for confirmation and provides a choice of possible actions in case you are going to complete a session which has questions that have not been reviewed yet.

2. You can search the list of sessions by their names by typing any symbol combination in the "Search and Filter" field above the list. This will refresh the list of sessions so that it will contain only sessions with a name matching the entered filter condition.

   You can reset the filter condition and revert to the complete session list. Clear the "Search and Filter" field and press Enter to reveal the complete session list.

3. You can sort the session list by the following session attributes:

- Recent - the most recently created sessions come first in the list;
- Date created - the oldest sessions come first in the list;
- Favourite - sessions marked as Favourite come first in the list;
- Name - sorted by session name in the alphabetical order;
- Status - New sessions come first, then come the Started sessions and Completed come last;
- Created by user - sorted by the name of user who created the session.

The user interface of the Reviewer module in the Session List view lets you perform the following operations:

- View the complete list of review sessions.
- Search the session list by session names.
- Open a session.
- Sort sessions by a chosen attribute.
- Perform some actions with the chosen session.

3.6.10.3. Renaming a Session

You can rename a session when you open it on the Session Overview page.

To rename a session:

1. You are redirected to the Overview page when you choose the Rename command from the Options drop-down control in the Options column on the Sessions page of the Reviewer module (see the previous step). Of course, you can edit the session name when you open the Overview page using a different technique. Click anywhere in the field that contains the session name.

3.6.10.4. Selecting Questions to be Included in the Review Session

The user can choose which questions will be included in the review session. All question types that are available in the Confirmit Authoring module for designing a survey can be edited in the Reviewer module. By default the Reviewer module DOES NOT INCLUDE any interview question in a review session. All interview 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 (see (go to Viewing the List of Review Sessions on page 162 for more information)), or click the Questions link on the Session Review page (see (go to Reviewing an Interview on page 169 for more information)).

To review a question, or a number of questions, you should first select them.

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.

   This will open the session record in the "Select Questions" view on the "All" tab. This tab lists all questions that the current interview comprises. The questions are presented exactly in the order in which they appear in the interview. Depending on whether you have selected some questions previously or not the page will display either the "All" tab - in case the session has just been created (see the picture below). When no question is selected, the link to the "Review" page will appear as stroke through indicating that you cannot review anything for nothing is selected:

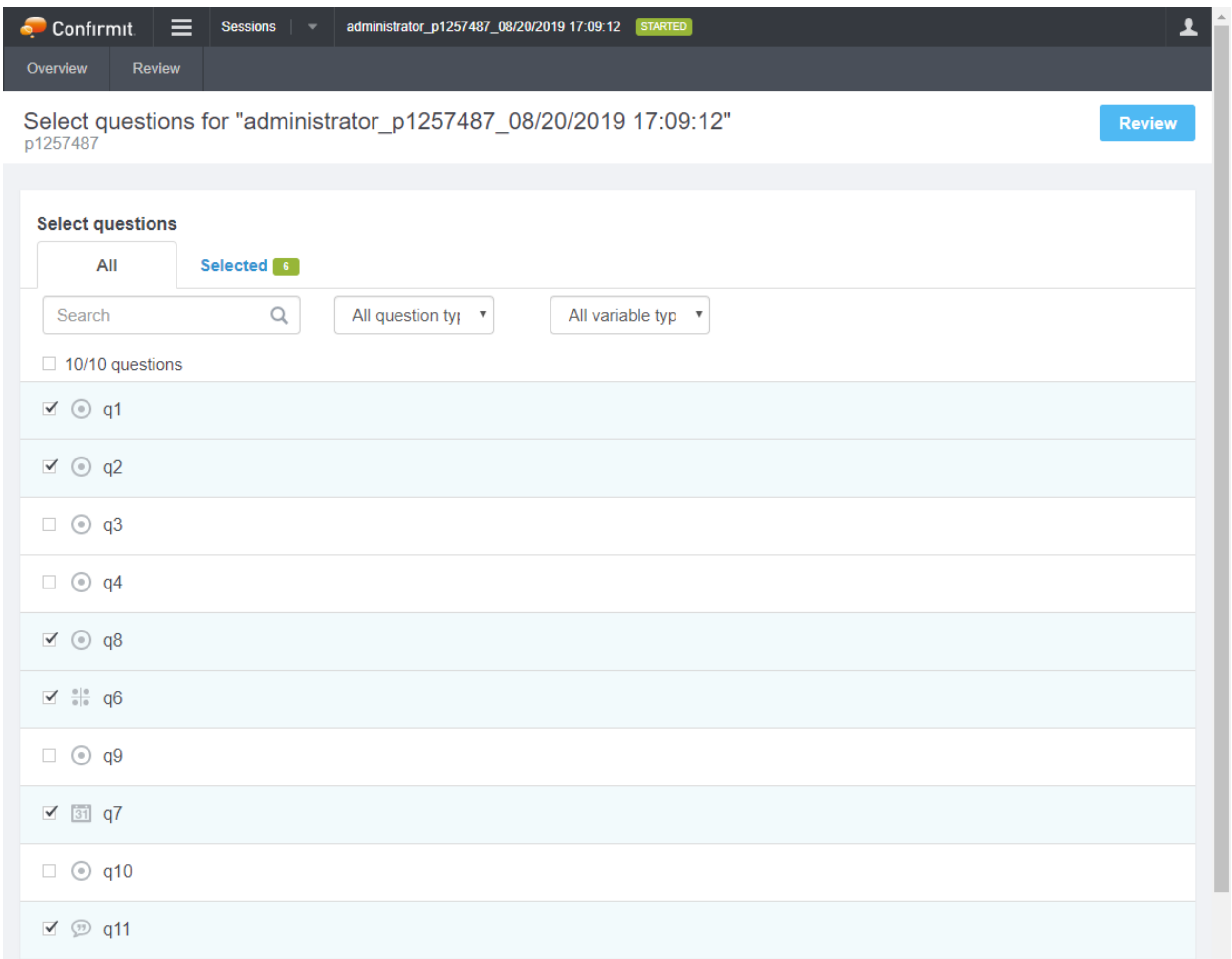


Figure 151 Session opened on the All questions tab

Or you may see the Selected tab if you have previously selected questions for this session (see the picture below).

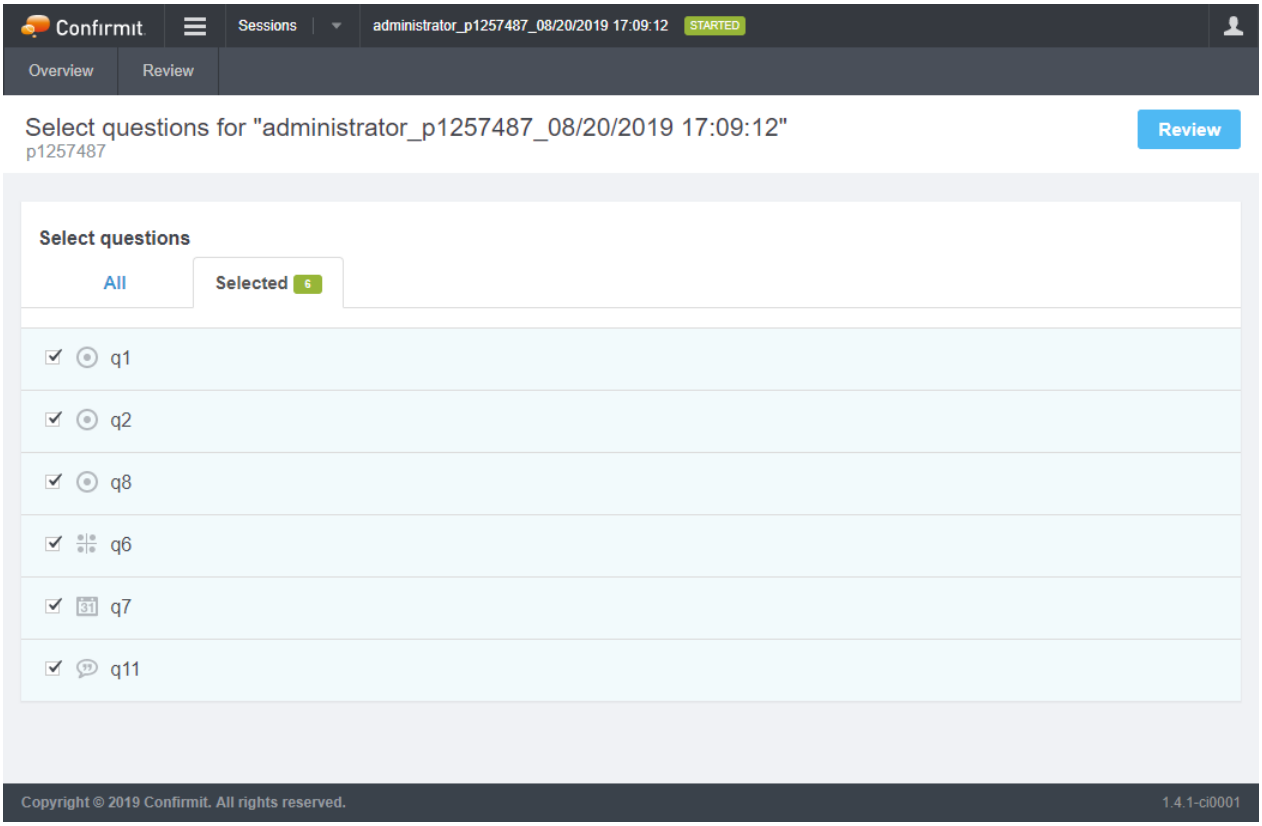


Figure 152 Session opened on the Selected questions tab

The green counter on the Selected tab shows the amount of questions 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. You can use the Search box above the question list to enter the filter condition and search for questions by their name. Reserved characters like ampersand or 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.

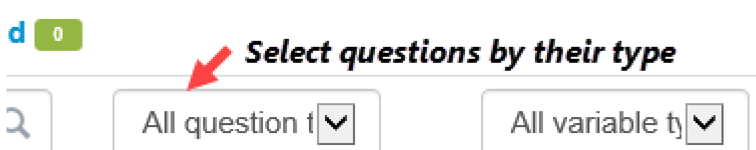


Figure 153 Selecting questions for review by type

Or you can 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

3. On the Selected tab you can remove the question from the session by clearing the corresponding box. . In case the session has already been started the system will prompt you to reset the session status, because you are changing the list of questions included in this session. The following warning will be displayed:

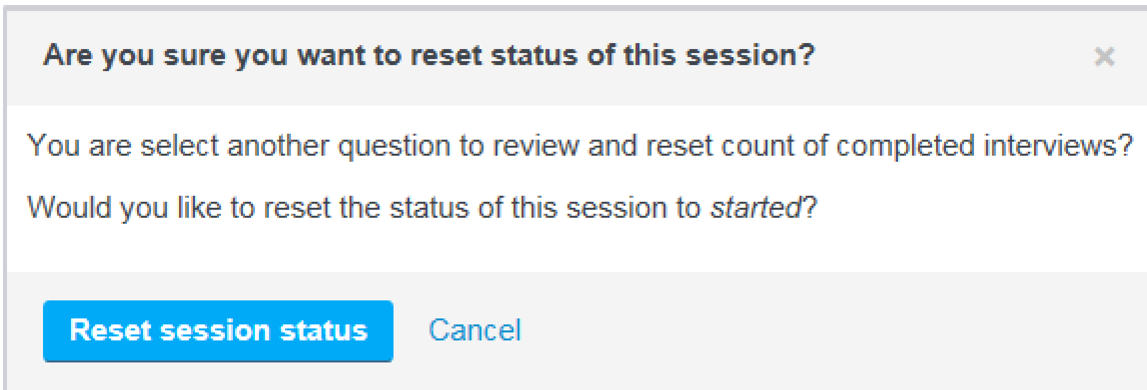


Figure 155 Warning displayed when a question is removed from the started/completed session

Click the "Reset session status" button - the status will be set to New, this warning dialog will close and the Selected tab will be displayed.

To view session overview:

1. To view the session overview you can either choose the Overview command from the drop-down menu in the Option column, or click the Overview tab on the opened Session page. Both actions will take you to the Overview page of the session:

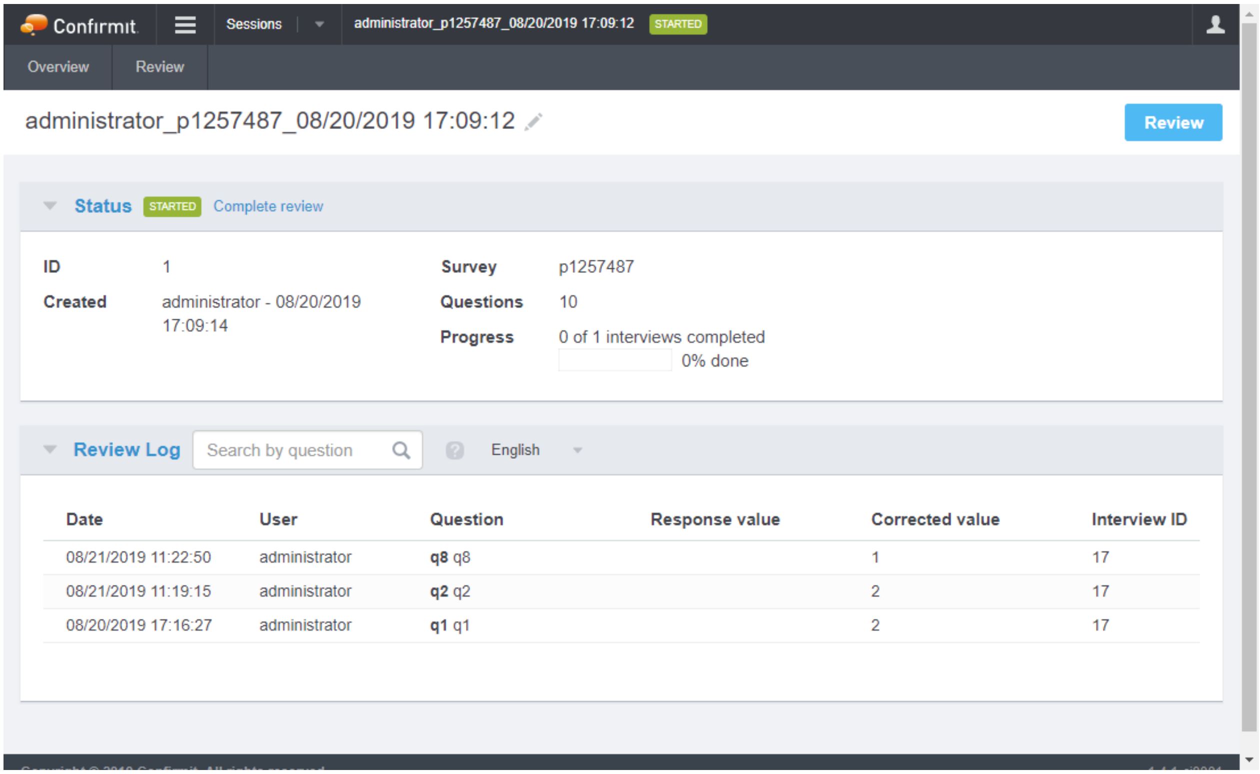


Figure 156 The Overview page of the opened session

This page lets you rename the session. Click anywhere in the field that contains the session name (the name is displayed right below the Overview and Review tabs).

The information block displayed on this page shows the following:

- Session status highlighted in the corresponding color;
- Session ID;
- The date and time when the session was created and the name of the user who created this session;
- The name of the survey which contains the interviews reviewed in this session;
- The amount of questions the interview contains;
- Description of the session progress stage.

To rename a session:

1. You are redirected to the Overview page when you choose the Rename command from the Options drop-down control in the Options column on the Sessions page of the Reviewer module (see the previous step). Simply click anywhere in the field that contains the session name to edit it.

To start a review:

1. You can start the review by doing the following:

- clicking the Review tab at the top of the page, above the session name;
- clicking the blue Review button on the right while you are on the "All" and "Selected" tabs in the Select Questions view (see Step 1 of the present instruction);
- choosing the Review command from the Options drop-down control in the Options column on the Sessions page of the Reviewer module.

All these actions will display the Session page containing a grid with questions.

The review procedure is described in details in (go to Reviewing an Interview on page 169 for more information). Refer to this topic for instructions.

To view any information regarding a session or to review it you have to open this session first. A session can be opened in a variety of ways, depending on what task you need to carry out you can choose the most convenient technique.

When you work with the opened session you can perform the following actions:

- view the list of interview questions and select some or all for review;
- view the session overview;
- rename a session.

3.6.10.5. Reviewing an Interview

You can start reviewing an interview when you have selected questions that are to be included in the review (go to Selecting Questions to be Included in the Review Session on page 165 for more information). Note that if no questions are 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 drop-down menu in the Options column;
- When you are browsing the Review tab of the Session page - click the blue **Review** button on the right side of the page, or choose the Review tab;
- When you are browsing the Overview of the completed interview - click the **Reopen Review** link.

This will open the Review page with all questions that were selected for review shown in a grid.

The Review window

The Review window allows for reviewing of interview questions included in the created review session. Reviewing supposes reading questions, checking provided responses and correcting these responses whenever necessary. You can play back any recorded question to exactly recreate the way it was recorded (see below). The grid on the Review page provides all information necessary for a supervisor to check and correct responses - the question text and selected response options. One question normally will occupy a single row in the grid. In case the question is of an open-text type the response is provided in the form of a free text. Some questions may be complex - for example, this could be a question of a "3D grid" type. Such complex questions are then expanded - they occupy two or more grid rows depending on the amount of response options used in this question. So reviewing is performed separately for each response option.

The Review window contains the following information:

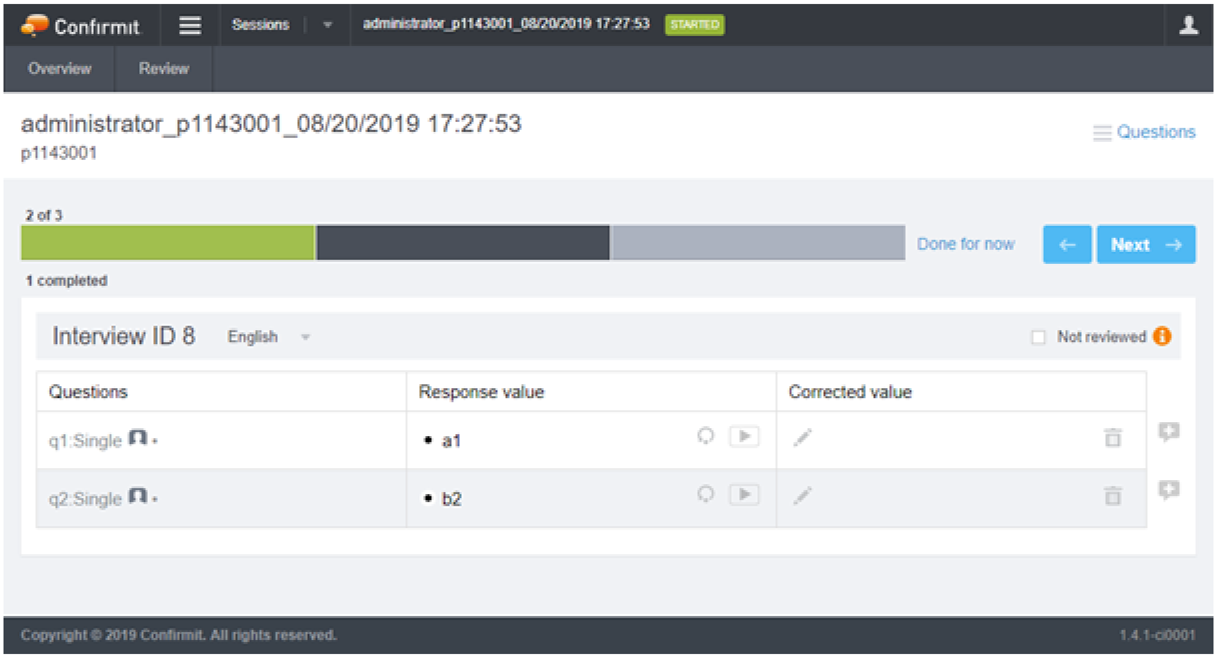
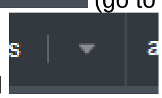


Figure 157 Review window showing session with two interviews completed

- The Review page header is similar for all pages used with the Reviewer module. It contains a link to the Session List Page  (go to Viewing the List of Review Sessions on page 162 for more information), a drop-down control  which allows opening any of the recent sessions in the Session Overview page (go to Working with the Session Overview Page on page 182 for more information). The page header also displays information regarding the session - the session name and the status indicator. In the picture above this indicator tells us that the session is in the "Started" status (go to Session Status Indicators on page 185 for more information).
- Below are 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 182 for more information), and you are currently working with the Review tab - the Session Review page;
- The Questions link  which is on the top right side of the Review page takes you to the list of questions that are used in the current review session - the Selected Questions page (go to Selecting Questions to be Included in the Review Session on page 165 for more information). The questions list will then be displayed on the Selected tab. Here you can add or remove some or all questions from the list of selected. This will also remove them from the session. Or you can add other questions using the All tab on the Selected Questions page;
- The review progress bar. In the picture above this bar shows that 2 interviews out of 3 were already reviewed - the second section of the bar is highlighted in green and verbal reference below the progress bar says: "2 completed", while the counter above the bar says the user is currently looking at the first interview: "1 of 3", and the first section of the progress bar is highlighted in dark grey, meaning the first interview in the review sequence is being reviewed currently;

- The "Done for now" hyperlink Done for now 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 185 for more information). This action takes you to the Session list.
- The **Next/Previous** ← Next → and the **Complete** ← 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 over to the next interview, the **Previous** button is displayed beside the **Next** button. When you reach the last question, the **Next** button turns into the **Complete** button. Press **Complete** to finish the current review and assign the interview the Completed status.

  Note that you can also 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 skip passed records that have not yet been reviewed).
- The grid header in the picture above shows that Interview with ID 5 comes first in the review sequence and the grid currently displays responses collected in the course of Interview ID 5. The grid header also contains a drop-down control which allows the user to change the current interview language (used in question texts and response options);
- The grid header also contains the "Not reviewed" option. You can enable it and it will act like a bookmark signaling that this interview was not reviewed and might need further attention later. When checked (enabled) this option also triggers a warning sign displayed below the progress bar and highlights the corresponding interview section on the progress bar in orange, like this:

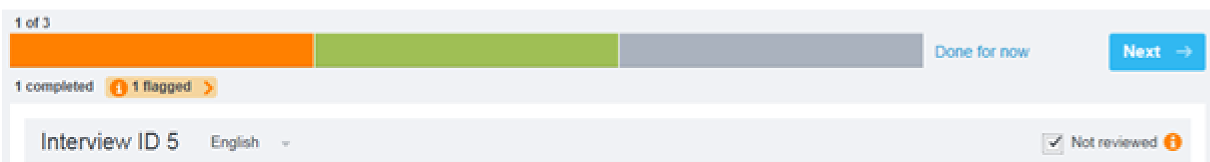


Figure 158 Not reviewed warning shown in the review grid

Clicking this warning expands it and it displays the relevant interview ID as a hyperlink. The user can then click this interview ID and be redirected to the corresponding interview - it is displayed in the grid.

When the flagged interview is finally reviewed, you can remove the mark by clearing the Not reviewed box. All highlighting will be removed also.

Performing a review:

1. When the review session opens in the Review window work begins with the interview displayed in the review grid. You can also choose any other interview by pressing the Next and Previous buttons.
2. Read information about a question displayed in the Questions column: it shows question ID, question name, question type and, optionally, question title.
3. Proceed to the Response value column. This column shows the response value that is stored in the database at the moment the review session is started.

   If this question type supports correction of the response value, the cell may also contain an action icon for resetting the current response value back to its original value. A playback icon is also available to start playback of the recording related to the question.

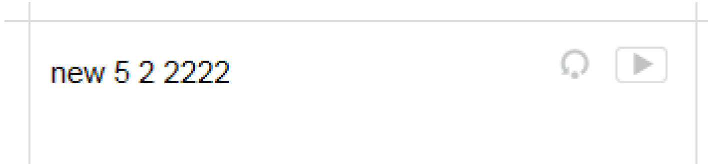


Figure 159 Response value showing the original response value and action icons

Playing back a question

Clicking the Playback icon starts playback of the recorded interview. This action is similar to the one used with deferred monitoring functionality - it starts the CATI Supervisor Player and plays back audio and video tracks if they were recorded at the time the question was answered by a respondent (go to Deferred Monitoring in CATI Supervisor on page 334 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 Confirmit Authoring module (go to Deferred Monitoring in CATI Supervisor on page 334 for more information). Playback of the recorded interview starts with the response you are currently editing. After the chunk 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 the recorded versions of the response is displayed next to the **Play** button in the Response value cell as 1 .

The **Reset** icon appears in the Response Value cell after the response value was corrected. When a response value retains its original value (no corrections were made) the **Reset** icon is not shown. 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.

4. 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, as.

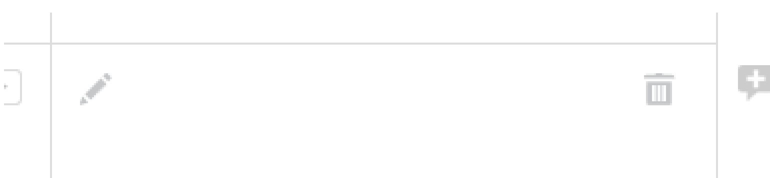


Figure 160 Corrected value cell containing action icons

5. 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.

6. Click the trashcan icon to delete contents of the Corrected Value cell. The system asks you for confirmation by displaying a warning message. 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.

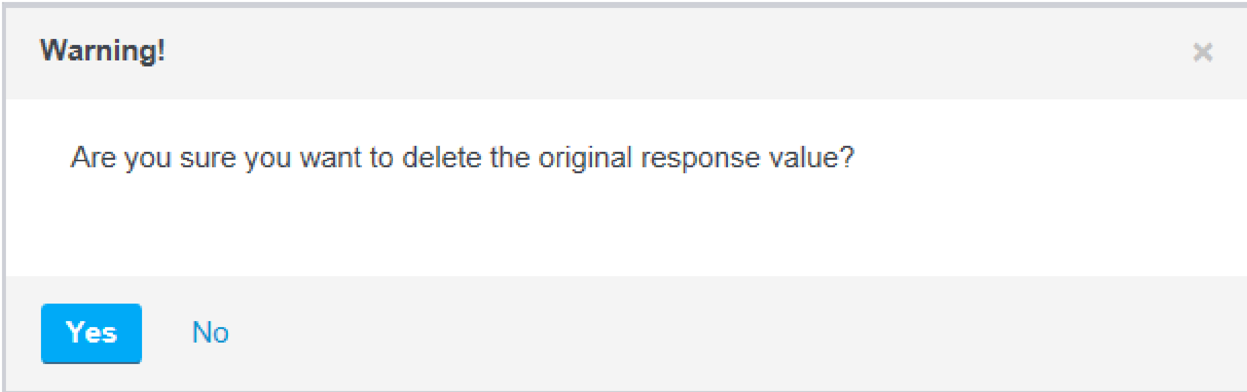


Figure 161 Warning message displayed upon attempt to delete a corrected response value

Choose **Yes** to proceed with deletion. The cell is cleared and the trashcan icon disappears.

7. You can also add comments whilst reviewing (these comments will not be written to the survey data). Choose the **Comment** icon to the right of the Corrected response cell to do it. The Add comment dialog opens.

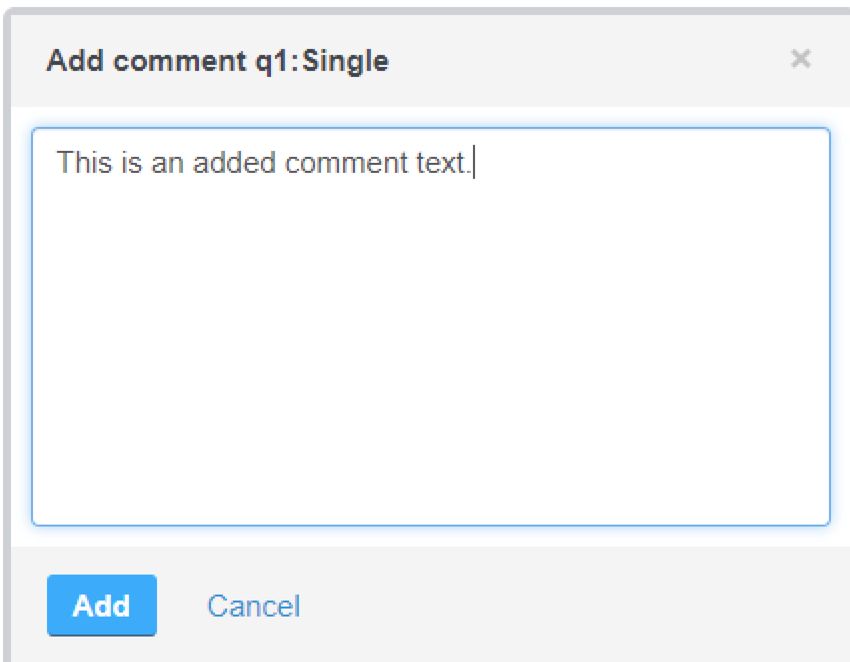
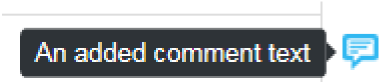


Figure 162 Adding comment to a question

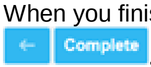
Type your comment in the dialog and click **Add**. This will store your comment and it will become visible when a user hovers a mouse over the Comment icon which changes and looks like this  after a comment is added. When a mouse is hovered over this icon, a pop-up is displayed containing the entered comment text



.

8. When you are through reviewing the current interview, proceed to the next one by pressing the **Next** button 

. This will refresh the grid and display response values for the next interview questions.

9. When you finish reviewing the final interview in the current review session, click the **Complete** button 

. 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 182 for more information).

10. You can also complete a review session at any point (go to Completing an Unfinished Session on page 181 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 184 for more information).

3.6.10.6. Reviewing Questions of Different Types

The Reviewer module supports editing all types of questions that are used in the Confirmit surveys. To that end the Reviewer module provides certain interface for each type of question. This interface is displayed in the Corrected field when the user starts editing the question.

This section explains interface used to correct answers. Main types of questions require similar approach for editing although some differences exist in the layout of these questions. For example, questions of the grid type are always displayed in the list on the Review page as "expanded list of answers" with every single answer shown on a separate line. Still a single question uses 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. Refer to relevant places in this topic for description of different question types.

The Reviewer module uses icons and badges that 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 180 for more information).

Here are some tips which are common for all types of questions you will be working with and which you should keep in mind when reviewing interviews.

Note: You always correct the VERY LAST response value, which is currently stored in the database. The value displayed in the Corrected value field is the latest revision of the response. When the Corrected value field is shown empty, it is the Original value you are going to correct.

Important!
Applicable to all types of questions. A corrected response value is saved to the database as soon as you leave the Corrected value field (by choosing any other 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 an exception of an "other" response option - see Notes above).

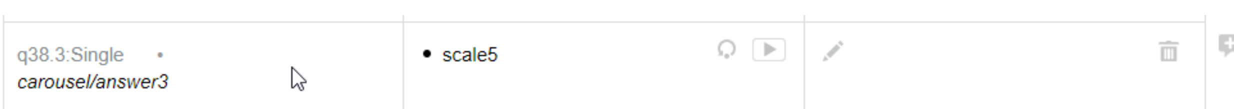


Figure 163 A Single question displayed in the list of responses

To delete an answer which is currently stored in the database you should click the "Trash-bin" icon. The answer is then 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 the 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 containing available response values and a search string unfolds. The value that is currently stored in the database is automatically highlighted in the list. If the value had been deleted previously or had not been provided at all, the field will appear empty.

Select a required value in the list. If necessary, use the search string to find the value you need. Type a required combination of symbols: the matching values are shown while other values are hidden.

When you select a value it is displayed in the Corrected value field. Since only a single choice is allowed here, when you select another variant it replaces the previous one.

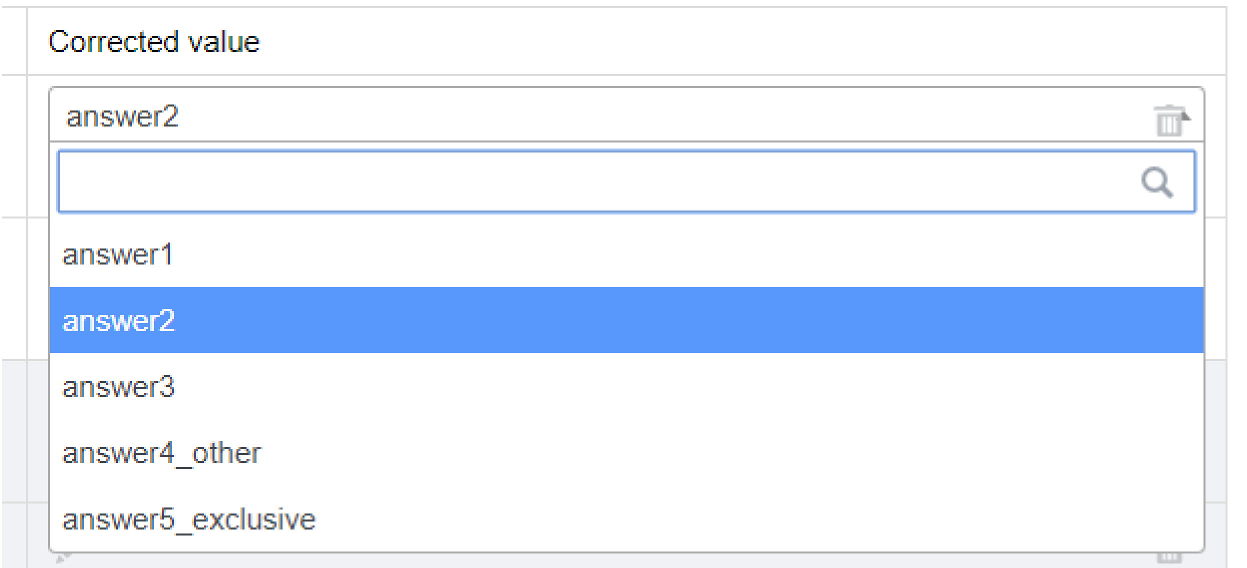


Figure 164 Selecting an answer for a Single question

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 Notes above).

To correct a currently existing answer by choosing a new one - click in the Corrected value field. A drop-down list containing available answer variants and a search string unfolds. All values that are used in the response currently stored in the database are automatically highlighted in the list. If the answer had been deleted previously or had not be provided at all, the "Corrected value" field for this question will appear empty.

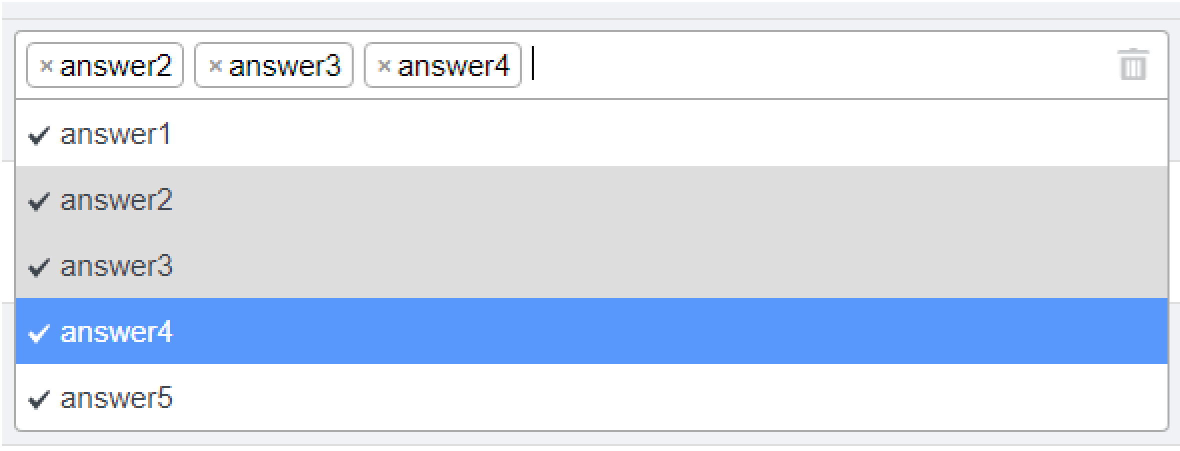


Figure 165 Currently selected values for the "multi" question

To delete ALL selected response values which are currently stored in the database you should 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 a particular value (or a number of values of your choice) you have to choose a "cross" icon inside the button corresponding to the required answer, like this.

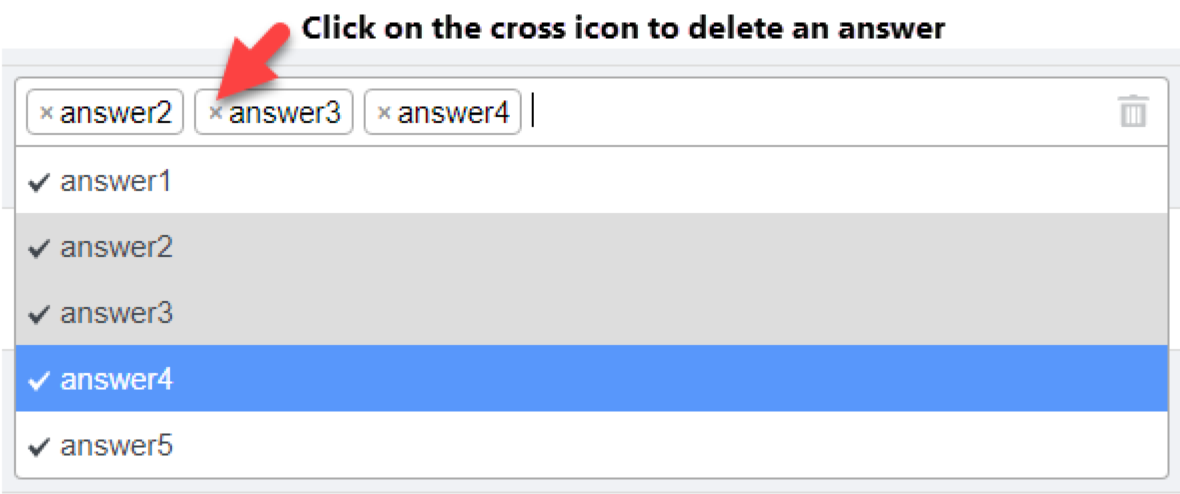


Figure 166 Deleting an answer from the multi question

Repeat this action to delete more answers.

When all answers are deleted from the "Corrected value" field, and you move the focus away from the Corrected value field, all answers are displayed in the Original response field as stroke through.

Editing a Grid question

For the Grid questions all answers are displayed in the Reviewer module as separate rows (see the illustration below). Each individual answer can be considered a single question, and it is edited in the similar way (see (go to Editing a Single question on page 174 for more information) for instructions).

q3.1:Single • *Grid with other and exclusive/answer1*	• scale1	• scale1
q3.2:Single • *Grid with other and exclusive/answer2*	• scale3	• scale3
q3.3:Single • *Grid with other and exclusive/answer3*	• scale3	• scale3
q3.4:Single • *Grid with other and exclusive/answer4_other*	• scale3	• scale3
q3.4.other:Open • *Grid with other and exclusive/answer4_other/Other*	tst	tstsdfsfsdfdsfdsf
q3.5:Single • *Grid with other and exclusive/answer5_exclusive*	• scale5	• scale5

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 in Reviewer similar to a Grid question, see the picture below for illustration.

g4.g4_1:Multi • *Multi grid/q1*	✔ answer2	✔ answer2 ✔ answer3
g4.g4_2:Multi • *Multi grid/q2*		✔ answer1

Figure 168 Editing a Multi Grid question

The only difference is the way the answers are displayed. Each answer is displayed on a separate row and looks and behaves like a multi 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". Each row displays the question type name, like this. The 3D Grid question below uses two types of questions - one is a single, the other one is multi.

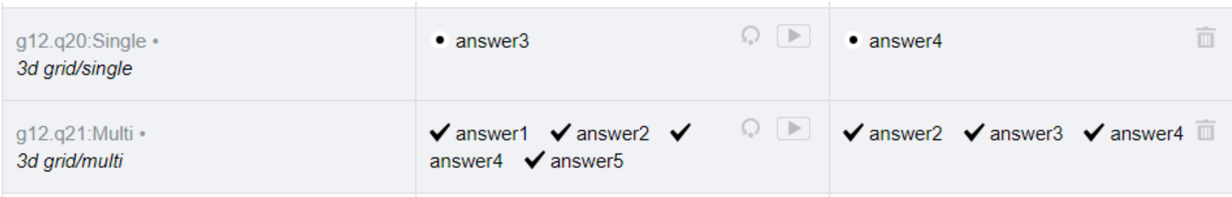


Figure 169 Editing a 3D Grid question

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 in Reviewer as a single row. The value of an answer is any combination of symbols, the format is not restricted.

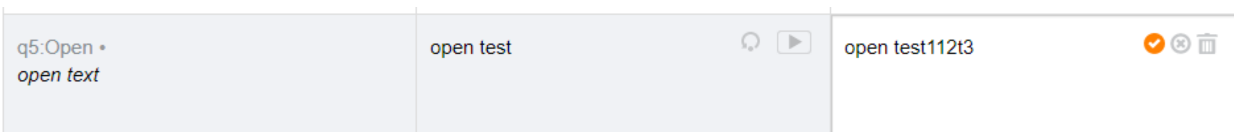


Figure 170 Editing an Open Text question

An Open Text question does not provide any specific interface for editing answer value - choose the Corrected Value field and edit the text here. Use the quick action icons to submit, delete an answer or a character.

Mind that if a value in the Corrected Value field is deleted and the cursor moves 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 is in the value format - it may consist of digits only.

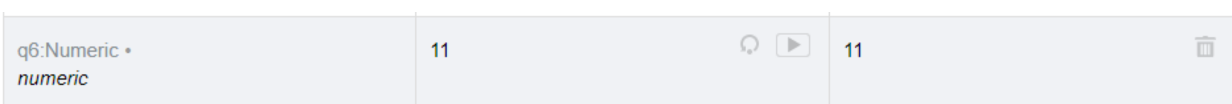


Figure 171 Editing a Numeric question

Editing a Numeric List question

This type of question is shown in Reviewer with each answer occupying a separate row. Answers are in numeric format, so editing technique is similar to 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 in Reviewer 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. To start editing a question you have to click in the Corrected Answer column and start editing a value.

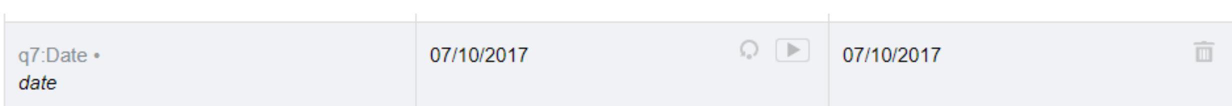


Figure 174 Editing a Date question

If you try to save the value in a wrong format, the Reviewer will flash a warning prompting you and showing the correct format.

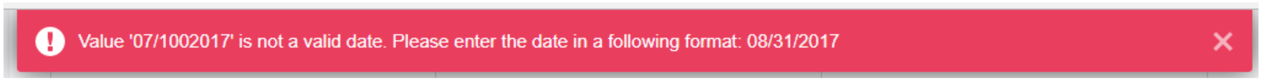


Figure 175

Editing a "loop" question

A "loop" question comprises a set of questions which in Reviewer usually are represented separately for each loop. Loop question sets are marked with a special mark (identifying the loop) which stands out of the table grid. It is prepended to the beginning of each row (see the picture below).

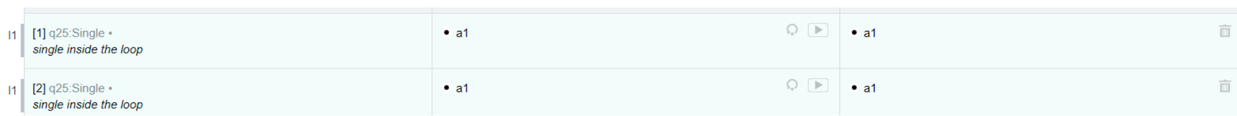


Figure 176 A "loop" question interface

Each answer is marked - a number in square brackets preceding the question name is an order number of this question in a loop.

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 - the order number is shown in square brackets before the question name.

Refer to the relevant section of this topic for instructions on editing a question of a certain type.

Editing a Ranking question

A Ranking question in Reviewer is presented and edited similar to a Multi question. The only difference is in icons identifying answers.

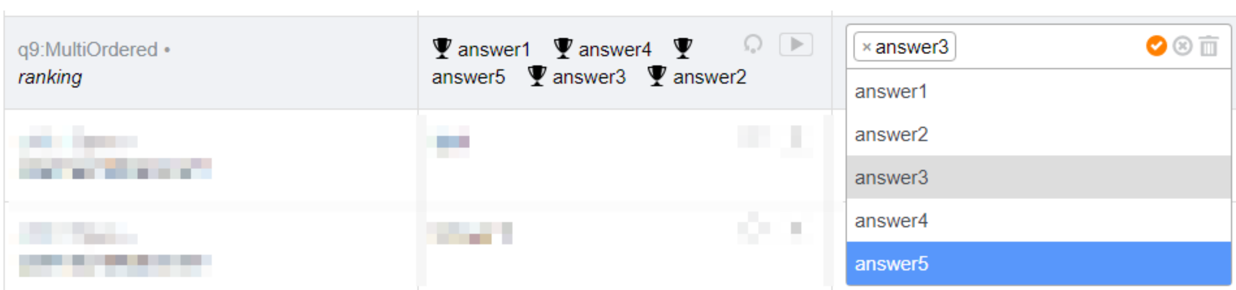


Figure 177 Editing a Ranking question

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 responder
	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		Restore the original response value
	Multi grid		Indicates that a comment was added by 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 point. This means you will not only stop reviewing interviews included into the current session, but also mark this session as completed - this action assigns the session the Completed status.

Any session which is assigned the Completed status can be reopened for reviewing at any moment later (see for details).

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;
- A "Complete" option can be selected using a corresponding drop-down control in the Options column in the Session List.

To complete an unfinished session from the Session Overview page

1. Open the required session that has the "Started" status on the Session Overview page (refer to for instructions on opening a Session Overview page).

2. Choose the "Complete review" link 

. The system will prompt you for action - a dialog is displayed warning you that some interviews (with the amount and interview IDs listed) are left unattended (see the picture below).

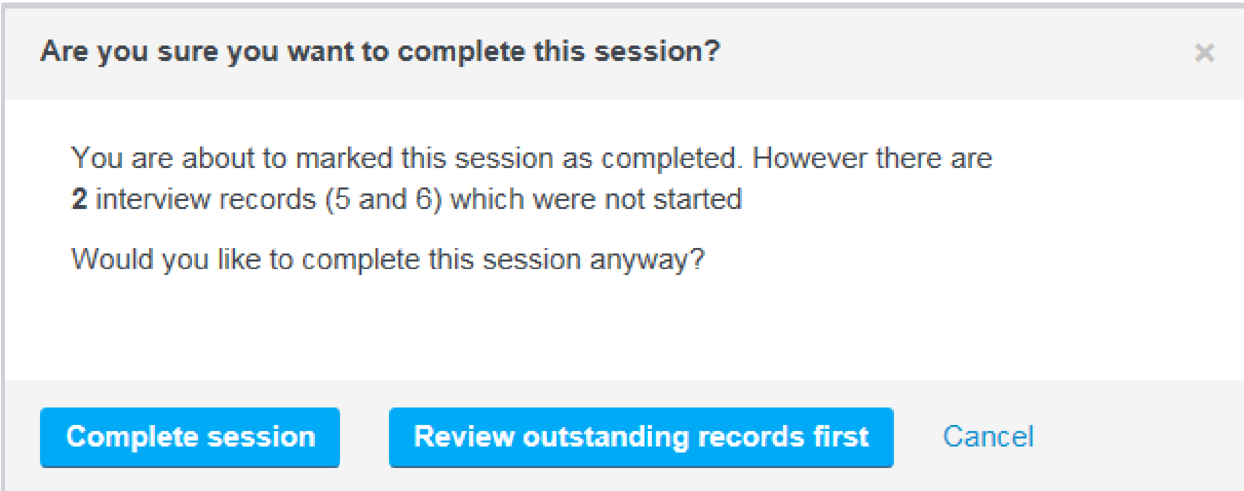


Figure 178 Warning displayed when an unfinished review session is being completed

You can choose to ignore the unfinished interviews and complete the session anyway by pressing the Complete session button, or choose to return to the Session Review page and complete reviewing the session in a regular way (see (go to Reviewing an Interview on page 169 for more information) for instructions on working in the Session Review page).

To complete an unfinished session from the Session List page

1. Locate the required session with the Started status in the list on the Session List page (see (go to Viewing the List of Review Sessions on page 162 for more information) for instructions on working with the Session List page).
2. Choose Complete from the drop-down control in the Options column. The system will prompt you for action in the way described in Step 2 of the previous instruction set (see (go to Warning displayed when an unfinished review session is being completed on page 182 for more information) for illustration).

3.6.10.8. Working with the Session Overview Page

A Session Overview page provides you with information regarding the session properties and lets you browse the session log. The session log lists all actions that have changed interview response values in any way.

The Session Overview page allows for the following actions:

- renaming the session,
- opening the session for review (for sessions with the New or Started status),
- reopening the session for review (for sessions with the Completed status),
- completing the session (for sessions with the Started status),
- viewing session properties
- viewing the session review log and searching this log by question name.

To open a session on the Session Overview page

1. To view the session overview you can either choose the Overview command from the drop-down menu in the Option column on the Session List page, or click the Overview tab at the top of the opened Question List page. Both actions will display the Overview page of the session.

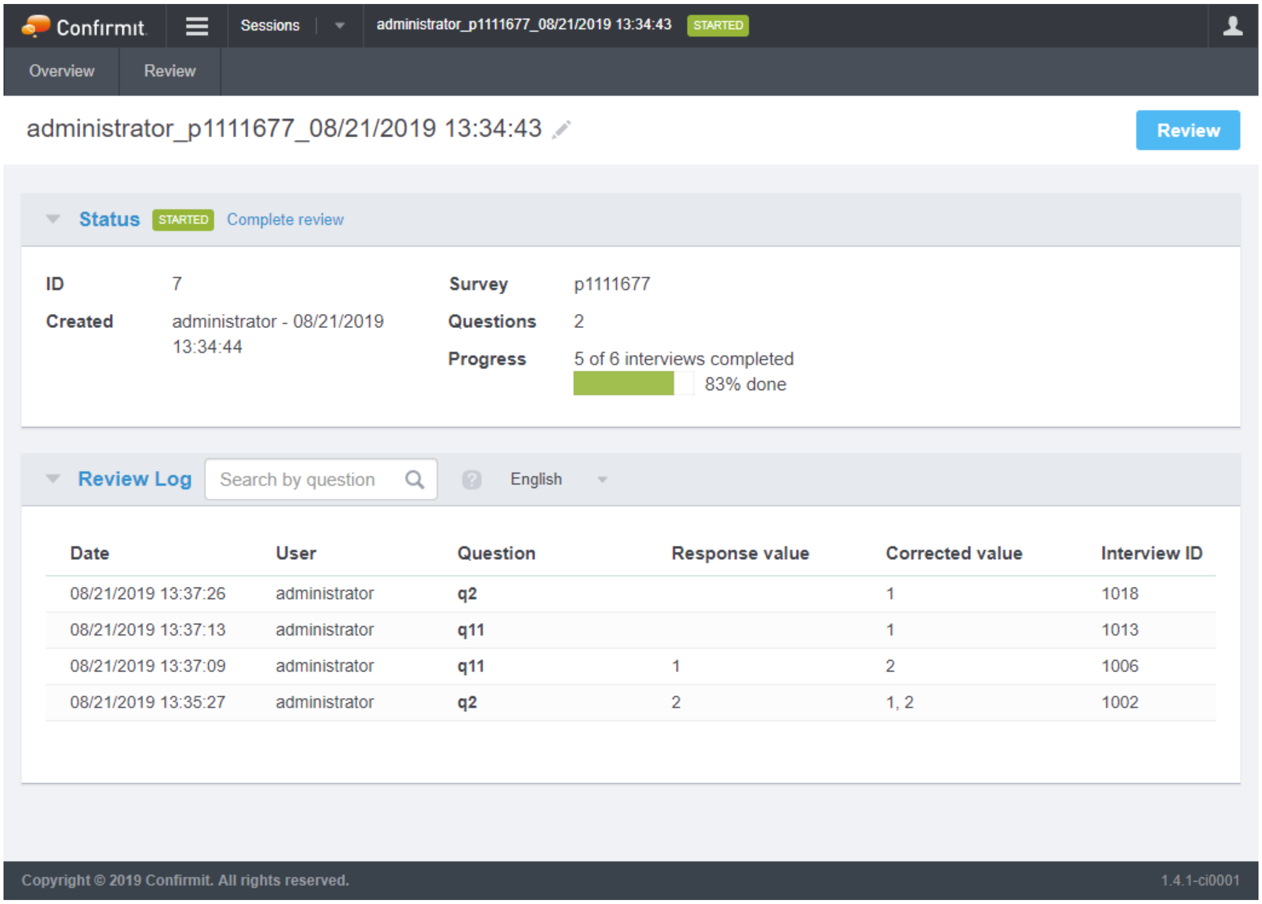


Figure 179 Review session information displayed on the Session Overview page

2. The header frame of the page contains:

- the Sessions link which opens the Session List page (see (go to Viewing the List of Review Sessions on page 162 for more information));
- the Recent sessions list drop-down control which allows instant opening of the recent sessions in the Session Overview page.
- the session name;
- the session status indicator (see (go to Session Status Indicators on page 185 for more information)).

3. There are two tabs below the header frame: Overview (the page you are currently browsing) and Review (opens the session you are currently viewing in the Session Review page, see (go to Reviewing an Interview on page 169 for more information)).
4. Next come:

- the session name - editable field, click in this field to edit the session name;
- the Review button 

 - starts review of the session you are currently viewing, takes you to the Session Review page (see (go to Reviewing an Interview on page 169 for more information) for information regarding the Session Review page)

5. Below is a section that contains session properties:

- the session status (see (go to Session Status Indicators on page 185 for more information) for details) and an action hyperlink 

status use either to complete a "Started" review session (see (go to Completing an Unfinished


ails) or reopen a "Completed" review session (see (go to Reopening a Completed Review Session on page 184 for more information) for details).

- current session properties: session ID, creator name, time/date of session creation, the name of a survey which the reviewed interviews belong to, total amount of questions in the interview, progress report showing count and percentage of reviewed interviews;

6. Below is the review log - a grid containing information regarding the review session: all actions taken in the course of reviewing the current session. The grid presents information in columns:

- time/date of action
- the user who performed this action,
- the question involved,
- the original response value,
- the corrected value,
- the interview ID.

Each grid row corresponds to a single review action.

The review action grid is searchable - you can search actions by the name of a question involved. Type a character combination into the search field - a "Search by question" prompt is displayed there. Special characters like 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

Any completed review session may be reopened for review at any time. This may be done in the following ways:

- by choosing the "Reopen review" hyperlink 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... link on the Session Overview page

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. Choose the "Reopen review" hyperlink 

beside the status indicator (see (go to Working with the Session Overview Page on page 182 for more information) for information about the Session Overview page). This will open the chosen session on the Session Review page.
3. Proceed with session review according to instructions contained in (go to Reviewing an Interview on page 169 for more information).

To reopen a completed review session by choosing another question set on the Selected Questions page

1. Display a Session List (by choosing Sessions in the top frame of the Reviewer module window) and choose the required completed session in this list. This will open the session in the Selected Questions page (see (go to Selecting Questions to be Included in the Review Session on page 165 for more information) for information about the Selected Questions page).

2. Add another question or remove a question from those already selected. This will display a dialog asking you whether you want to reset the session status from "Completed" to "Started".

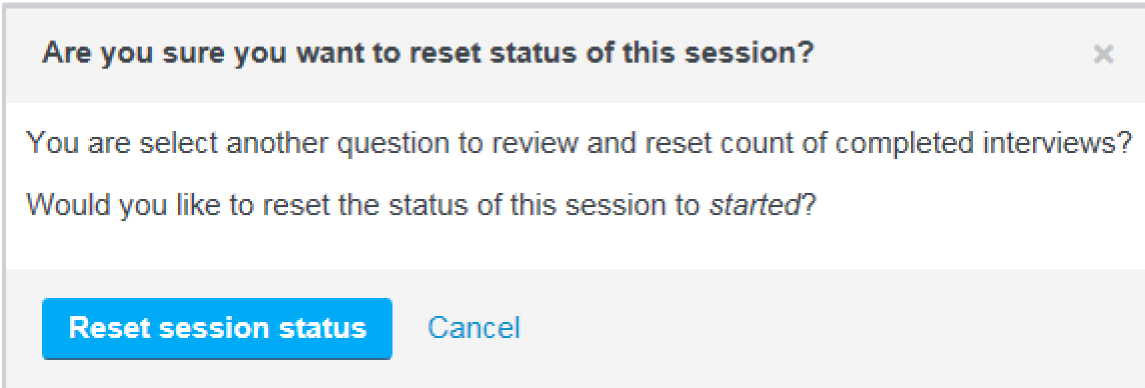


Figure 180 Redefining question set used in a completed session and putting this session into a "Started" state

Click the Reset session status button in this dialog to do this. The session is then assigned the "Started" status and opened in the Session Review page ready for reviewing (see (go to Reviewing an Interview on page 169 for more information) for instructions on reviewing a session).

3.6.10.10. Session Status Indicators

A Review session can be in one of three possible statuses. Statuses and verbal progress descriptions clearly tell the user in what state the session review is at the moment, and how many interviews must be reviewed for this session to be completed. Each status is complemented with a colored indicator:

The statuses are:

- New 

 - means the session was just created and no question has been reviewed yet, or the session status has been reset and all questions are treated as "not reviewed";
- Started 

 - means the review is currently in progress, some interviews are not reviewed yet (may also mean that reviewing may have been halted for some time but will be continued later);
- Completed 

 - means the review is completed, all interviews included in the session have been reviewed.

3.6.11. Recording and Playing Back Conversations

The CATI Supervisor module allows for recording of the interviewing process. In CATI Supervisor this function is called the Deferred monitoring. Refer to (go to Deferred Monitoring in CATI Supervisor on page 334 for more information) for complete description of this function. Initial steps required to enable the deferred monitoring in CATI Supervisor include enabling recording of the interview audio track - the *Enable whole interview audio recording* option should be enabled on the CATI Options tab of the Survey Settings view in Confirmit Authoring module (refer to the Confirmit Authoring manual for details).

The supervisor can play back the audio track from the recorded interview using the Call Management dialog window interface controls.

The recorded interview becomes available for playback shortly after it is finished. The supervisor can review the available audio recording at any time later.

Recorded audio files can be played either directly from the dialing system server, or downloaded on your machine, and played locally later. File name and extension are displayed in the Audio Player dialog box.

To play back the recorded interview:

1. First you should check which particular interviews contain the recorded audio track. Click the Retrieve Audio button in the Call Management dialog window. 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.

   This will start the built-in audio player utility in the separate window.

   Playback of the audio track starts automatically.

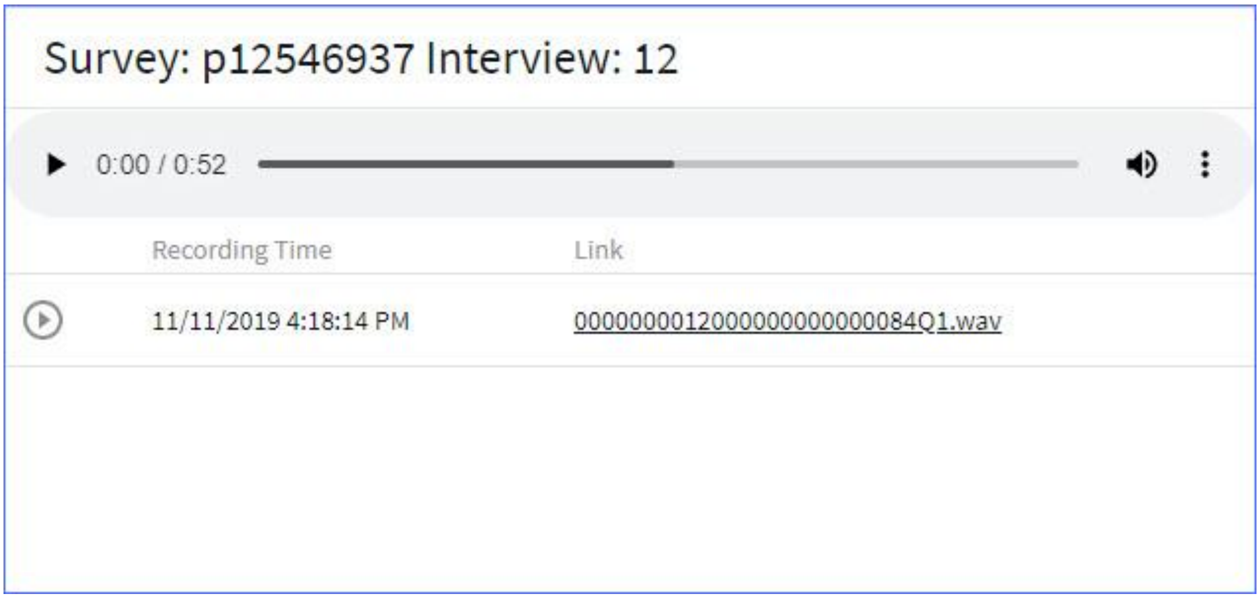


Figure 181 Playing back audio track from the recorded interview

   You can control the playback process using the appropriate controls in the audio player window.

3. The dialog window header will show the survey ID and the interview ID.
4. 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 there can be two or more audio files available for one interview. This means that the interview has first been paused and then continued. Each interview chunk in such case is stored as a separate audio file.

The grid has three columns. The Recording Time column shows the time the recording was saved. The button to the left of the timestamp allows starting and stopping the playback (similar to the Play and Stop buttons using which you control the playback in the audio player).

The Link column contains a direct link to the audio file with the interview recording. Clicking this link will start playback of the file in the default Windows media player application.

Right-clicking any of these links will display the standard browser context menu. Using commands from the context menu you can choose between saving the selected file locally, or playing it in the default audio player application.

Remember that any audio file containing an interview recording can be saved and reviewed later.

5. Clicking on the three-dot action menu button located on the right-hand side of the playback progress bar will display the "Download" command. Choose this command to download the audio file into the default location on your computer.
6. 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.
7. 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 the PII data it contains, a special procedure should be performed for encryption to be executed - refer to(go to The Security Settings Section on page 466 for more information) for information.

To export interview/call list:

1. In the Call Management window select the interview/call state to display (use the State drop-down list to do this). The Export command will export the list of interviews/calls only in the selected state. To export the list of all interviews/calls existing for the current survey you should choose the All state.
2. Click the Export button on the toolbar. This will display the Export modal window.

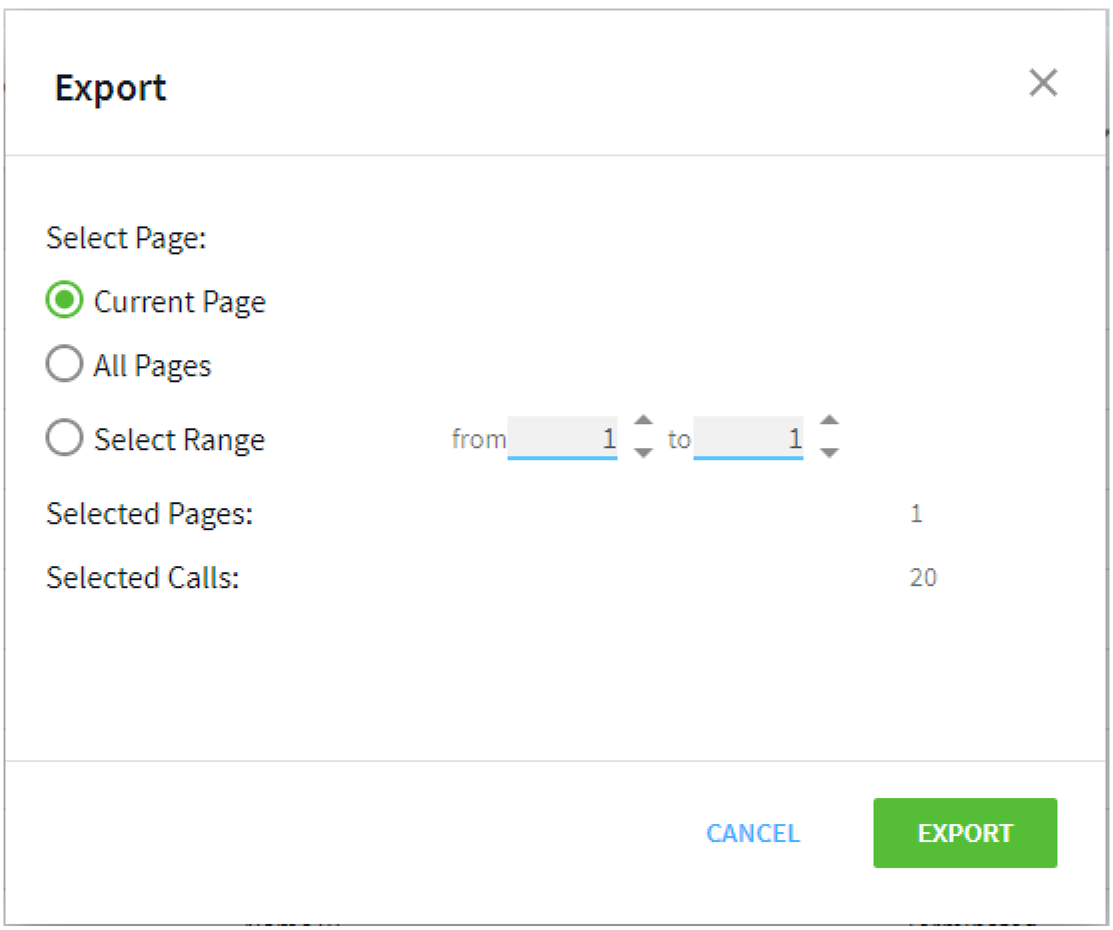


Figure 182 Exporting interview/call list

3. The Export dialog allows selecting how many pages (in case the interview/call list occupies more than one page) of the interview/call list should be exported.

   Choose a corresponding radio button to select the amount of exported pages. Page range can be specified using the spin controls.

   The bottom part of the Export dialog displays how many calls and pages are currently selected for export.

4. Click Export to start the export, or Cancel to close the Export dialog without performing the command. In a while after you click Export button the standard Windows dialog prompting you to save or view the exported file appears. Choose **View** to view the exported list in MS Excel (it starts automatically then), or choose Save to save it for later use (you will have to choose the location for saving in this case).

5. The interview/call list is exported as a table with columns containing the following information for all listed interviews/calls: Expiration Time, Time of Last Call, Appointment Time, and Appointment Expiration.

3.7. Survey Assignments

The supervisor can assign interviewers for a specific survey or define certain 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 start with choosing interviewers/interviewer groups and then assigning different 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 188 for more information). These procedures are performed similarly to the way assignments are made or replaced on the Assignments tab in the Survey Properties View mode.

You can de-assign surveys or persons using the Assignments tab in the Survey Properties View mode.

Do not forget that you can assign and de-assign surveys, and also replace the 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 (see (go to Viewing the Survey List on page 69 for more information) for instructions).
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 window opens.

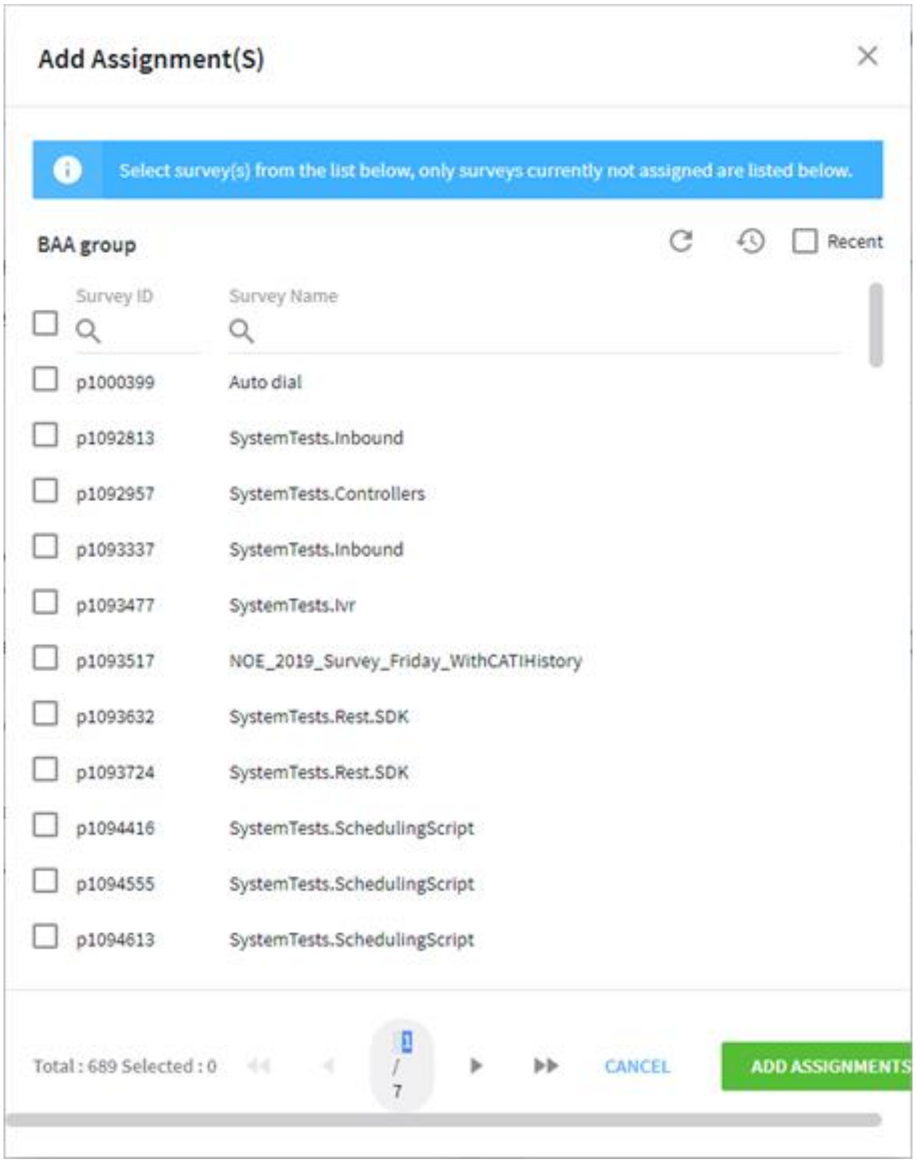


Figure 183 Selecting users and groups to assign to the survey

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:

1. Open the list of surveys in the top right frame (go to Viewing the Survey List on page 69 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.

   Note that this procedure can only be used to replace assignments for one survey at a time.

The Replace Assignments dialog opens.

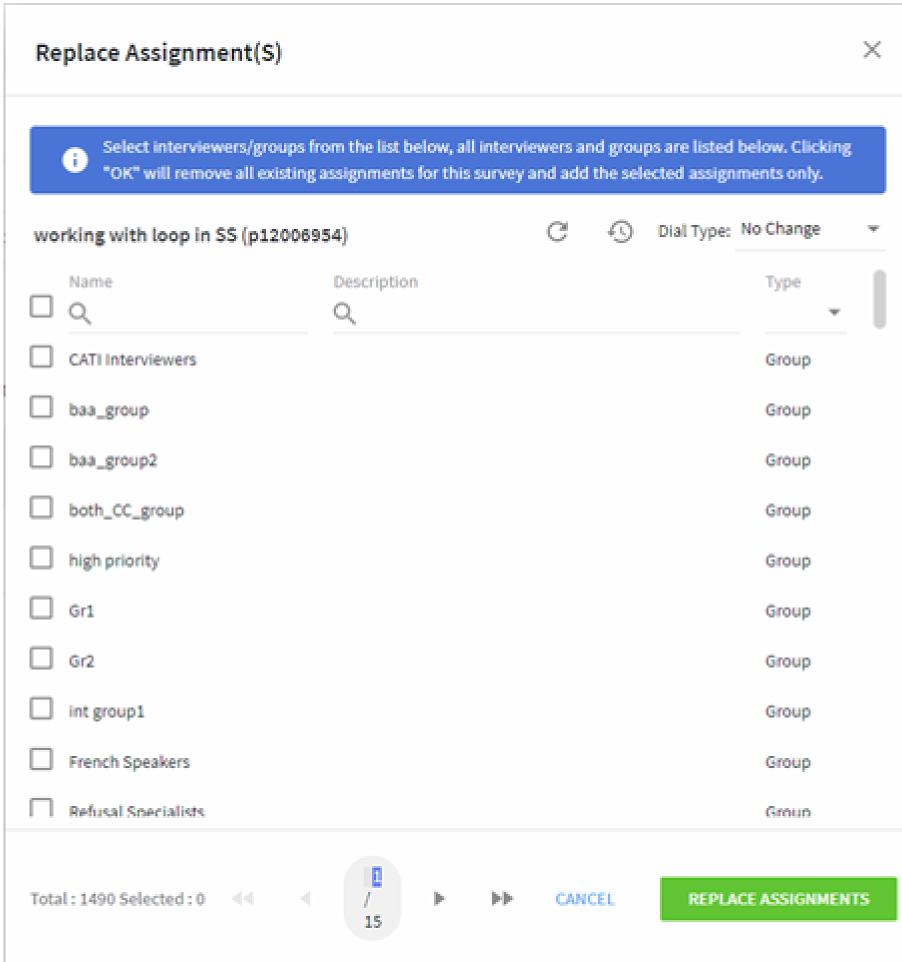


Figure 184 Replace survey assignments dialog window

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.

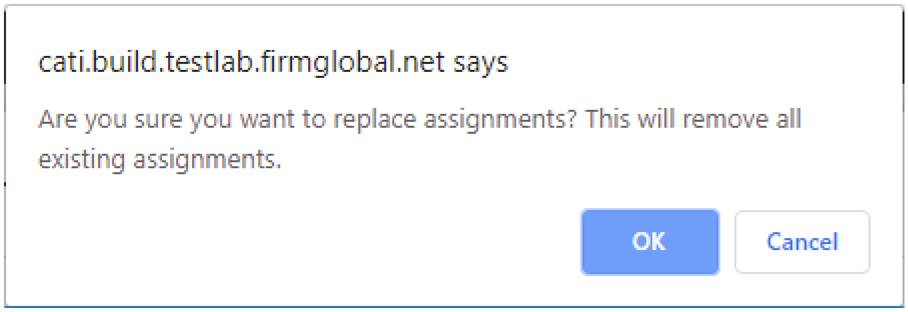


Figure 185 Warning message displayed on the attempt to execute the assignment replacement

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

In case there was no activity regarding survey data over a substantial period of time, CATI Supervisor performs an automatic clean-up procedure for that survey.

The automatic clean-up procedure for such survey includes the following actions:

- cleaning the call list for the survey by removing all existing calls from that list;
- cleaning the assignment list for the survey by canceling all existing assignments for this survey.

A survey is considered inactive, and an automatic survey clean-up is executed when all of the following conditions are met at one moment:

- the specified inactivity time period has elapsed for the survey (the time period of inactivity after which the clean-up procedure should be due is specified by the system administrator);
- the following activities WERE NOT performed for the survey over the specified period of inactivity:
  - opening/closing the survey;
  - loading a sample for the survey;
  - invoking the Call Management dialog for the survey;
  - starting an interview for the survey.
- the survey is in the "Closed" state at the moment 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 person who supervises the survey in question by sending him an appropriate email. The notification email states that the clean-up procedure for the particular survey is about to be due in 10 days.

The supervisor can cancel the clean-up procedure if he performs any of the above listed actions upon receiving the clean-up notification email.

After the inactivity period has elapsed, and the clean-up procedure is completed, another notification email is sent to the person supervising the survey. The email sent upon survey clean-up completion states 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 complete 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 the PII data it may contain, a special procedure should be performed for encryption to be executed (go to The Security Settings Section on page 466 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 - see (go to The Default and Current Call Centers on page 196 for more information) for details).

Data in the file is sorted first by SurveyID and then by date/time timestamp.

To export call history data

1. When the list of surveys is displayed in the top right frame (the Survey tab is chosen in the Navigation menu) select one or a number of surveys.
2. Either right-click on any selected survey, and choose Export call history from the context menu that appears, or click the Export call history button on the frame toolbar.
3. The Export Call History Data modal window is displayed then.

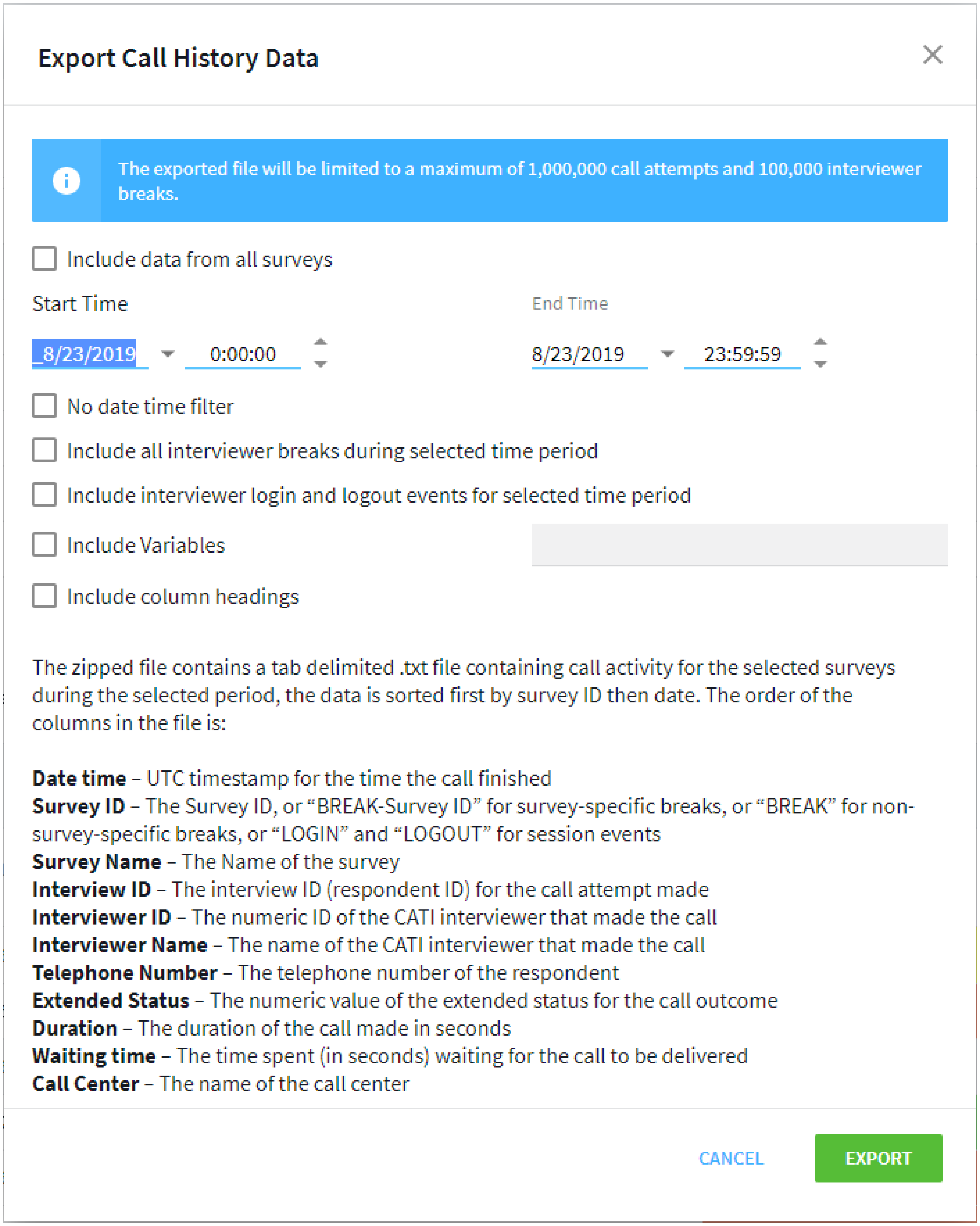


Figure 186 Selecting options for the call history data export

4. Whatever selection you have made in the All Surveys list, you can choose to export call history data pertaining to all surveys that are included in this list. Enable the Include Data From All Surveys option by checking the appropriate box to do this. This option is available only for supervisors who have been granted an appropriate permission by the system administrator.

   You can choose to export data pertaining to all calls that have been made in the course of all the selected surveys (by choosing 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 401 for more information). You will have to select the start/end date, and then set the start/end time. The date is selected with the use of the calendar form which is displayed when you click the button in the date field. The time is set in the time field either by typing the desired time, or by changing it using the spin controls.

   Also 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 to include interviewer breaks data, clear the box to hide it.

   There is an option of including all log in/log out events pertaining to the selected survey(s) into the generated file. To do this choose 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 related interviewer. This data is separated into groups - each survey included into the report will be followed by the mentioned data.

   You can include additional information pertaining to certain variables. This information will be appended as extra columns to the generated report. Note that you can include only variables which are marked as "Available as CATI filter". Variables can be marked as "Available as CATI filter" in Confirmit Authoring, refer to the appropriate section in the Confirmit Authoring manual for instructions. To include variables check the Include Variables box and then enter variable name in the Include Variables field. You may include a number of variables. In this case you should use semicolon to separate variable names. In case the variable with the provided name is absent, the corresponding column will be created in the report but it will remain empty. Each variable column that is appended to the generated report will display the variable name in the header.

5. Contents and format of the file containing the exported data are described further in the dialog window.

6. Click Export to start, or Cancel to terminate the procedure.

7. Call history data is exported as a single archive file containing two files. One file inside this archive is an XML description, and the other one (the one you will actually use to read the data) is a tab delimited file in the plain text format.

8. When Export button is pressed, the export procedure is initiated, and in a short while the standard Windows dialog box asking whether you want to open or save a file is displayed.

   If you choose the Save option, you will have to select a path to save an archived file. In this case you can open it later from the selected location.

   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. A Call Center is defined by the following properties:

- the Call Center name,
- its description,
- a link to a time zone,
- the ID of the dialer which is assigned to the call center.

We can consider a Call Center as a kind of a virtual container which holds a range of objects. It is used to organize work in CATI Supervisor by creating a separate logical unit including supervisors, surveys and related interviewers.

Any Call Center is characterized by the following information:

- List of supervisors who are assigned to work in this Call Center;
- List of surveys activated in this Call Center;
- List of interviewers created for this Call Center.

In general, a call center is configured by adding surveys to it and assigning supervisors to work with those added surveys. Supervisors then add interviewers which, in turn, conduct interviews for each survey.

Call centers are created within a company. A company can hold any number of call centers.

When a call center is configured the following rules are applied:

- Each supervisor can be assigned to a single Call Center only;
- Any number of different supervisors can be assigned to work in a single Call Center;
- Any survey can be activated in any number of Call Centers;
- An interviewer can be created in a single Call Center only. Moreover, an interviewer's name should be unique across the CATI Supervisor system.

Call centers are managed by supervisors who are granted the extended management rights by the company. Such supervisors are called "administrator"-supervisors: they are entitled to manage work of subordinate supervisors, which in turn are called "normal". "Normal" supervisor's task is to organize the work of the interviewers and manage the surveys which they are granted a permission to work with. The "administrator" supervisor mostly prepares the basis for this work: they create call centers, assign surveys and supervisors to call centers. Of course, any "administrator" supervisor can carry out "normal" supervisor's duties when required.

The difference between the "normal" and "administrator" supervisors is not only in their range of duties, but also in their rights to access objects which are used in 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 currently works with, other objects are hidden from him. Still there are certain objects which are accessible to all supervisors regardless of which call center they currently belong to and what permissions apply to them.

To make "normal" supervisor's work more convenient certain object lists are either filtered by Call Center ID, or these lists use only data relevant to the currently logged in supervisor. This means any "normal" supervisor can see and access only objects that pertain to the Call Center he currently works for. Below is the list of objects which are available to a "normal" supervisor, with reference to a filtering option (whether each object is filtered by Call Center ID or not):

- 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, see (go to Call Management on page 120 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 - reports are generated based on data filtered by Call Center ID. Therefore they pertain to the current Call Center only;
- recorded interviews - are NOT filtered. All recorded interviews are available currently with the possibility of manually filtering the recording list by applying a filter in the corresponding column in the table (see (go to Deferred Monitoring in CATI Supervisor on page 334 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 not required since only the assigned surveys are available and 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 certain 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. In such case these surveys will be hidden although they belong to the same call center as this supervisor. Data relevant to such "hidden" surveys will not be used for generating reports and activity views.

Therefore, we can define a Call Center as follows:

A Call Center in the CATI Supervisor module defines a group of supervisors who manage the work of a unique group of interviewers and a specific list of surveys they have permission to work with.

4.1.1. The Default and Current Call Centers

Whichever company you work for there is always a "Default" Call Center present. It is created for each company automatically by the system. This is a Call Center which is used by default for any related operation when no other Call Center has been created yet. All surveys by default are activated in the default call center, all supervisors are assigned by default to this default center. Of course, eventually any survey can be activated in another Call Center, and any supervisor can be assigned to another Call Center, too.

The default Call Center cannot be deleted although its properties can be edited. You can rename the default center, change its description, or change the time zone defined for it.

Also you cannot redefine the default call center (set another call center to act as a default one instead of that).

Other call centers can be added to the system over time. Supervisors can be assigned to call centers other than

default. As soon as any supervisor is assigned to a call center other than the default one he/she stops using the original Default center as default and starts using the call center to which he is currently assigned (CURRENT) as the default one instead.

The CURRENT call center is a call center to which the currently logged in supervisor is assigned to. It is used as the default for this supervisor.

These are the actions that are performed by default in the CURRENT call center:

- adding an interviewer to the system;
- activating a survey at the moment it is launched in the Confirmit Authoring module;
- assigning a supervisor to the survey.

The CURRENT call center is indicated in the dedicated section on the Horizons panel (see the picture below). The blue rectangle displays the name of the current call center - this call center is considered CURRENT for the currently logged in supervisor.

Figure 187 The Horizons toolbar displaying the current call center name

Therefore, the DEFAULT call center is always present in the system, and it acts as current until the supervisor is assigned to another call center. When the supervisor is assigned to some call center, it becomes the CURRENT (and, therefore, the default) call center for him.

Note that operations with Call Centers are only available 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

CATI supervisor-"administrator" is in charge of managing Call Centers. He arranges "normal" supervisors in separate groups and assigns surveys to these groups.

A separate group of supervisors working with a certain group of surveys is referred to as a "Call Center" in CATI Supervisor module.

To manage Call Centers the "administrator"-supervisor is granted the right to perform the following tasks:

- Create and edit Call Centers (see (go to Creating and Editing a Call Center on page 201 for more information) for instructions);
- Delete Call Centers (see (go to Deleting a Call Center on page 204 for more information) for instructions);
- Activate surveys in particular Call Centers (see (go to Activating Surveys in Call Centers on page 206 for more information) for instructions);
- Assign supervisors to particular Call Center (see (go to Managing Supervisors on page 200 for more information) for instructions).

Mind that the "normal" and "administrator" supervisor rights are granted in the Confirmit Authoring module. Refer to the corresponding section of the Confirmit Authoring for details on this procedure.

4.2.1. Viewing the List of Call Centers

To view the Call Center list:

1. Either click on the Call Centers object tab in the left Navigation menu to open the menu and select **Call Centers**, or click the blue **Call Center** button on the Horizons toolbar.

   The list of all currently existing Call Centers opens in the top frame of the CATI Supervisor main window.

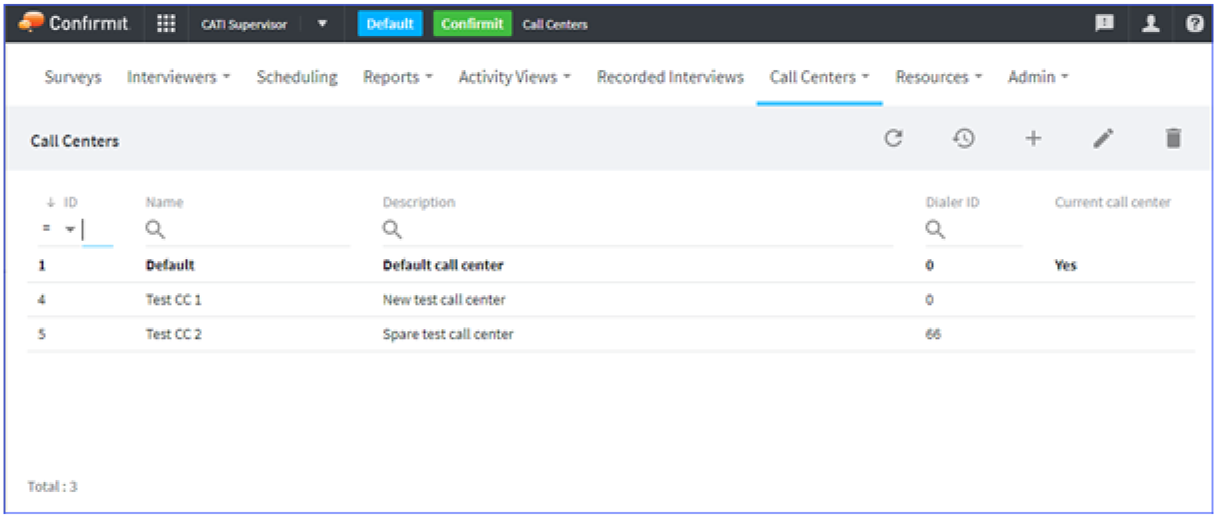


Figure 188 The list of Call Centers displayed in the top frame

You can perform the following operations with Call Centers:

- Create and edit Call Centers (go to Creating and Editing a Call Center on page 201 for more information).
- Delete Call Centers (go to Deleting a Call Center on page 204 for more information).
- Activate (go to Activating Surveys in Call Centers on page 206 for more information) and deactivate (go to Deactivating Surveys on page 208 for more information) surveys in Call Centers .
- Assign supervisors to particular Call Center (go to Managing Supervisors on page 200 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 currently selected Call Centers at once
	NEW	Displays the New Call Center dialog window and allows creating a new Call Center
	PROPERTIES	Displays the Call Center Properties dialog window and allows editing Call Center properties
	DELETE	Displays the Delete Call Center dialog window and allows deleting selected Call Centers

4.2.2. Viewing the List of Activated Surveys

To activate or deactivate a survey, start by browsing the activated surveys list. To view the list of activated surveys:

1. Click on the Call Center object tab in the left Navigation menu. The menu available for the Call Center object opens.
2. Choose the Surveys tab. The list of all currently activated surveys is displayed in the top right frame.

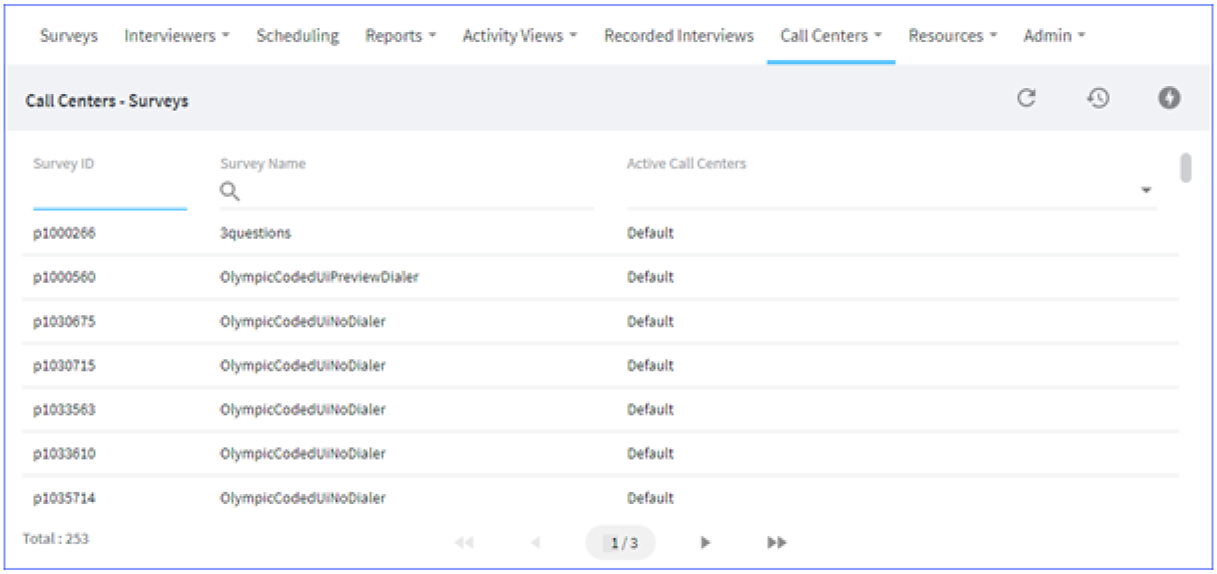


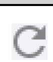
Figure 189 Viewing the list of surveys activated in the current Call Center

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 206 for more information)
- Deactivate the selected survey in the call center (or in a number of call centers) (go to Deactivating Surveys on page 208 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 pressing buttons on the toolbar in the top right frame (the toolbar is located in the frame's title bar).

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 at once
	ACTIVATE IN CALL CENTERS	Displays the Activate in Call Centers dialog window and allows activating and deactivating 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" himself and were granted the right to work with the CATI Supervisor module (granting of these rights is done by means of the Confirmit Authoring module - refer to the corresponding section of the Confirmit Authoring manual for instructions).

The "administrator" supervisor can organize "normal" supervisors' work - he/she can assign them to certain call centers. When a "normal" supervisor logs in to work with CATI Supervisor module he starts working in the call center to which he was assigned using the below procedure. This rule has only one exception: when a supervisor is granted the right to work with CATI Supervisor module he is automatically assigned to the default call center, and can later be assigned to another call center using the below procedure.

Assigning supervisor to a call center

1. Display the list of supervisors by choosing the Supervisors tab in the Call Centers navigation menu (CATI Supervisor application left frame). The list of supervisors will appear in the top frame of the CATI Supervisor application window.

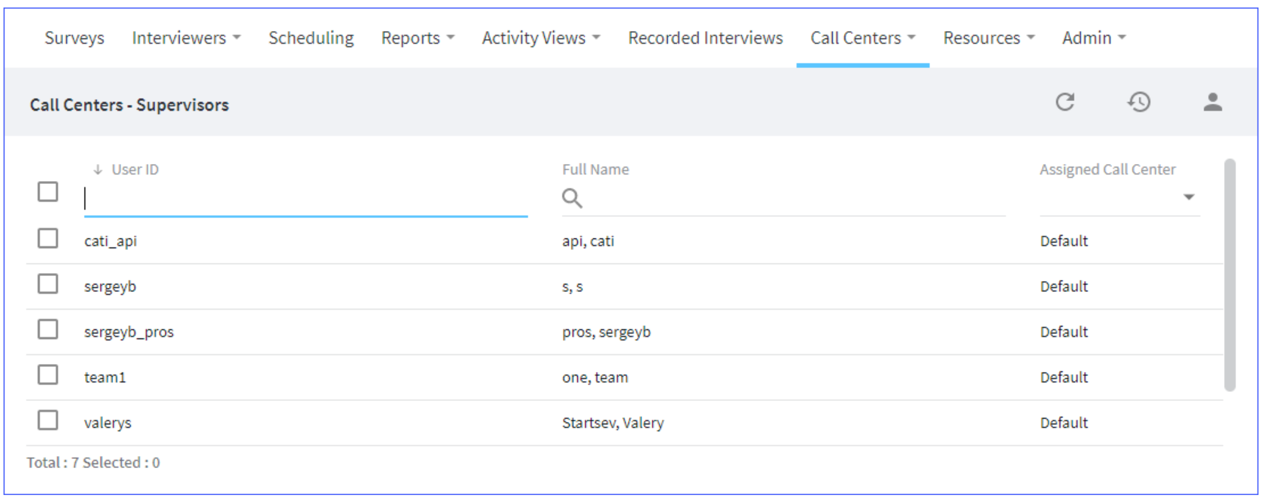


Figure 190 Browsing the supervisor list

The list of supervisors displays the User ID (which is used for logging into the system), user's full name (which is used to register the supervisor in the system), and the name of the assigned call center (which is regarded as the CURRENT call center for supervisor).

2. Select one or a number of supervisors in the list by checking boxes next to their names. Next 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.

   This will display the Assign Supervisor modal window.

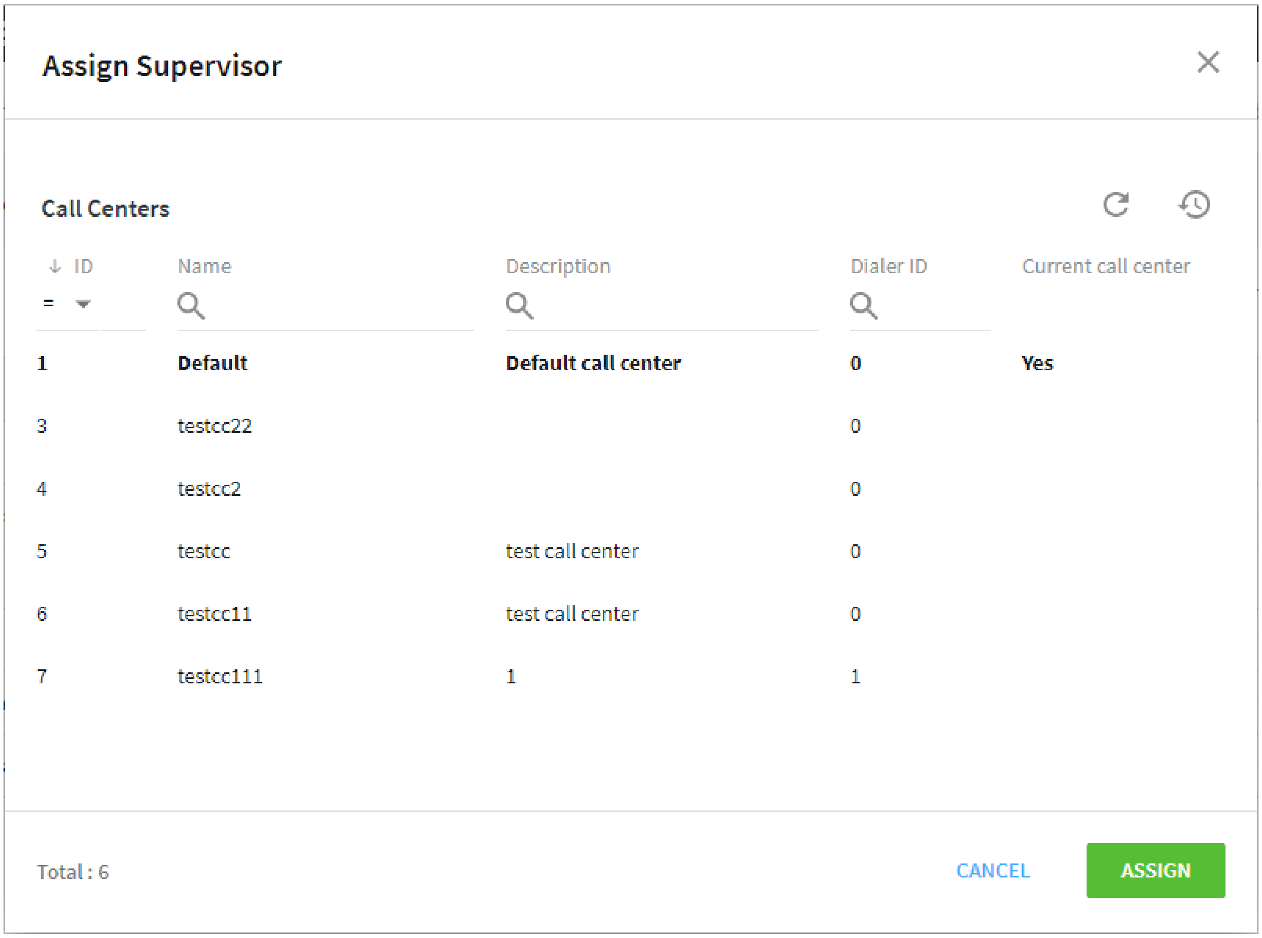


Figure 191 Assigning supervisor to a call center

3. The window displays the list of all call centers to which you can assign the selected supervisors. Only one call center can be chosen at a time.

Mind that a call center to which the supervisor was assigned (or each call center in case you have selected a group of supervisors) will be substituted with the selected one as the result of the action. At any given moment a supervisor can be assigned to a single call center only. The call center to which the supervisor is assigned becomes the CURRENT call center for him.

4. Click the Assign button to accomplish 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 (see (go to The Default and Current Call Centers on page 196 for more information)). You can edit or delete any created Call Center.

To create a Call Center

1. Display the list of Call Centers (see (go to Viewing the List of Call Centers on page 197 for more information)). The list is displayed in the top frame and looks like this.

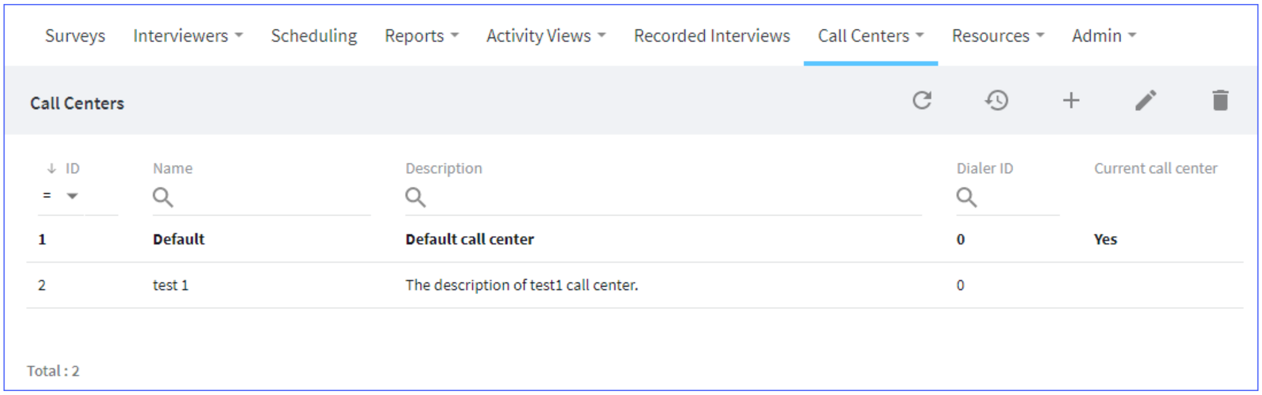


Figure 192 The list of Call Centers displayed in the top frame

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. This will display the New Call Center modal window.

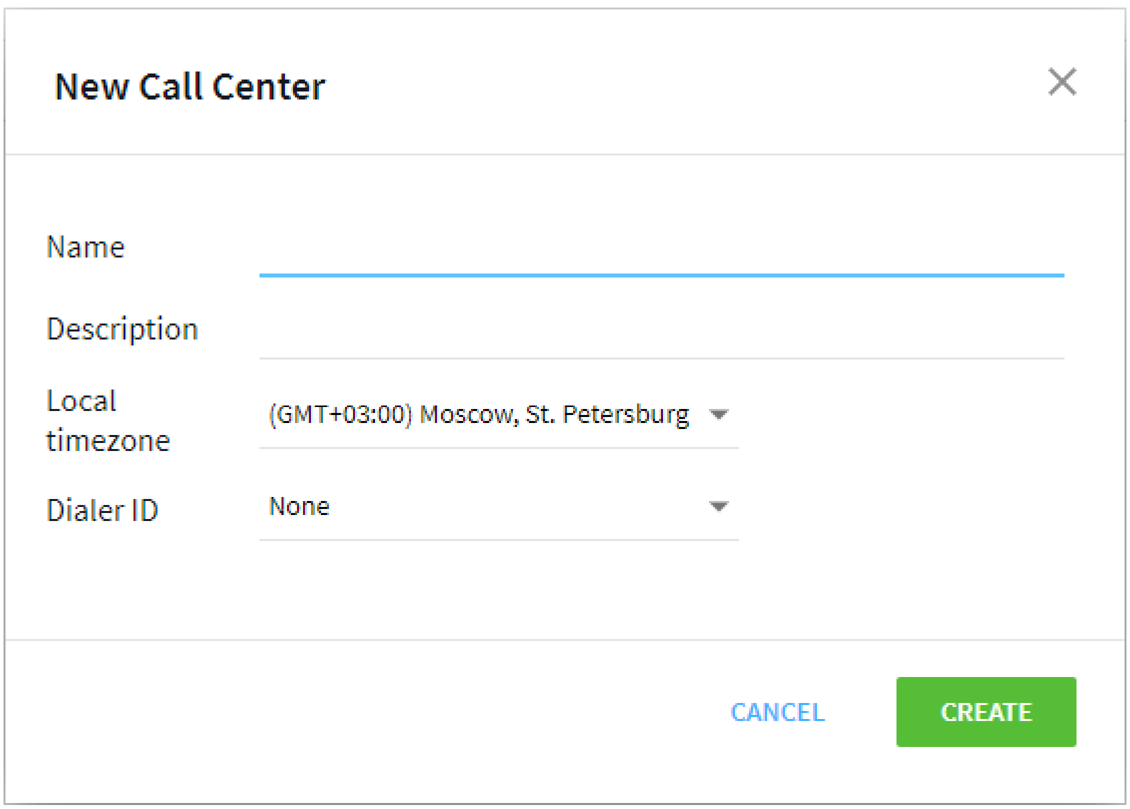


Figure 193 The New Call Center dialog window

Fill in the Name and Description text fields. The Name is mandatory and should be unique across the system, Description is optional. Choose the timezone which will be considered as local for this Call Center, or accept the default value which is the GMT timezone. From the Dialer ID drop-down list choose the ID of the dialer that will be automatically used to make calls for surveys assigned to that call center. Note that the dialer will not be used for surveys for which the Dial Mode was set to "Manual" in the Confirmit Authoring module. You can also choose "None" in this field: meaning that a dialer will not be used for this call center at all. When you select "None" in the Dialer ID drop-down list, the Dialer ID value shown in the Dialer ID column in the Call Center list will equal "0" (which is the value corresponding to the "None" option).

Click Create to create the New Call Center or Cancel to close the window without creating a Call Center.

3. The newly created Call Center is assigned an ID and displayed in the Call Center list in the top right frame.

To edit a Call Center

1. Display the list of Call Centers (see (go to Viewing the List of Call Centers on page 197 for more information)). The list is displayed in the top right frame and looks like this.

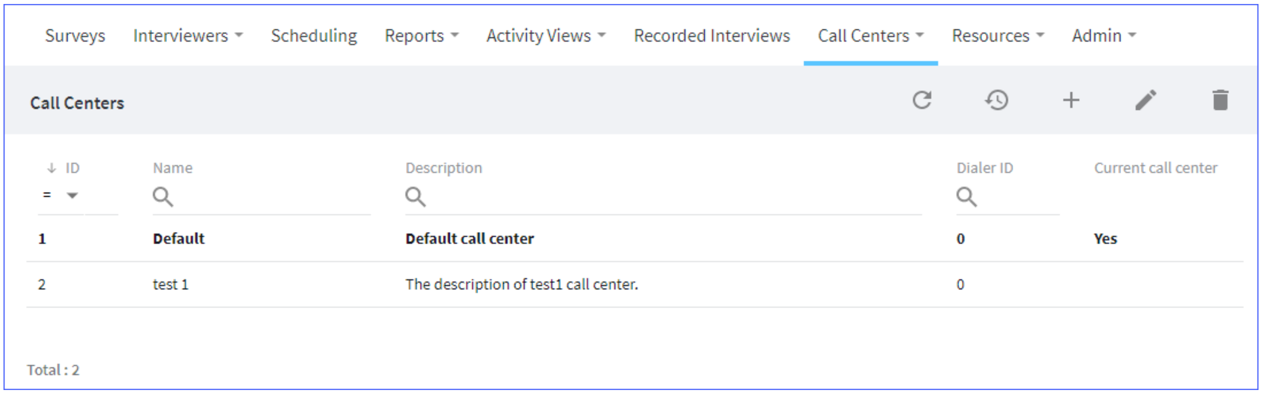
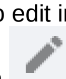


Figure 194 The list of Call Centers displayed in the top right frame

2. Right-click the Call Center you want to edit in the list and choose Properties from the context menu that appears, or click the Properties button  on the frame toolbar. This will display the Call Center Properties dialog window.

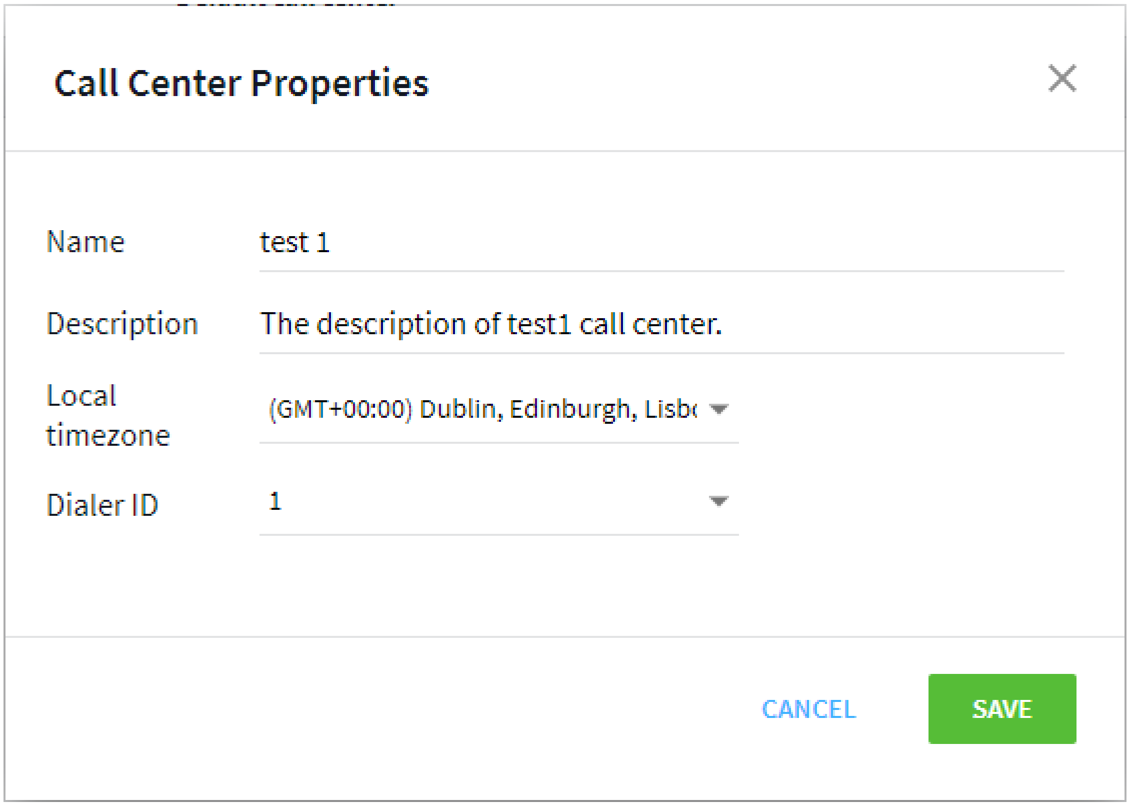


Figure 195 Call Center Properties dialog window

Edit Name and Description text fields as required. The name is mandatory and should be unique across the system, description is optional. Choose the timezone which will be considered as local for this Call Center. Choose the Dialer ID from the Dialer ID drop-down list.

If you try changing the Dialer ID while at least one interviewer belonging to that Call Center is logged in, the CATI Supervisor will cancel this operation and display the warning message. Make sure all interviewers who work in that Call Center are logged out: then you can change the Dialer ID.

You should not change the Dialer ID when there is at least one interviewer working in the current Call Center who is currently logged in. Make sure that all interviewers working in the current Call Center are logged out: then it is safe to change the Dialer ID.

Click Save to save the edited Call Center properties or Cancel to close the window without editing a Call Center.

4.2.5. Deleting a Call Center

Any created Call Center except for the Default one can be deleted at any time.

Most of the times a call center has some activated surveys, a number of supervisors assigned to this center, and interviewers that were added by supervisors. When the deletion action is initiated the system prompts you to choose what should 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.

Mind that even if you choose moving interviewers to a new call center alongside the surveys, interviewer and interviewer group assignments to surveys will be deleted. The statistics regarding interviewers work will become unavailable, too. In other words, all previous tasks and results would be reset, and interviewers would appear in another call center as freshly added.

Deletion of a Call Center cannot be undone. Please exercise caution when configuring this operation.

To delete a call center

1. Click on the Call Centers object tab in the left Navigation menu. This will unfold the menu available for the Call Centers object.
2. The Call Centers option is selected by default. If it is not selected - click the Call Centers option. This will display the list of all currently existing Call Centers. This list is displayed in the top right frame of the CATI Supervisor main window.

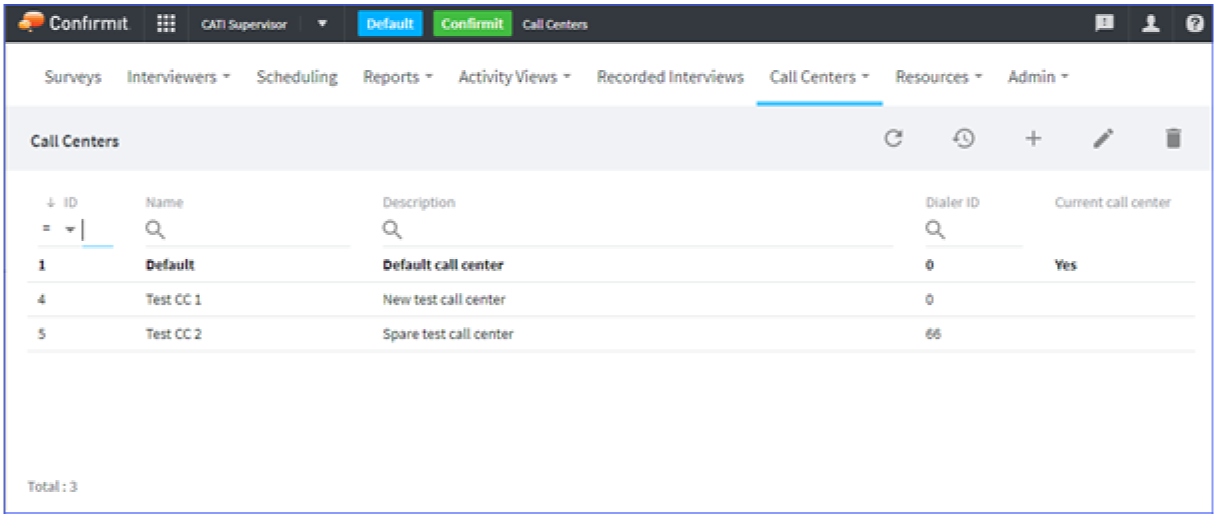


Figure 196 Displaying the list of call centers

3. 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. This will display the Delete Call Center dialog window.

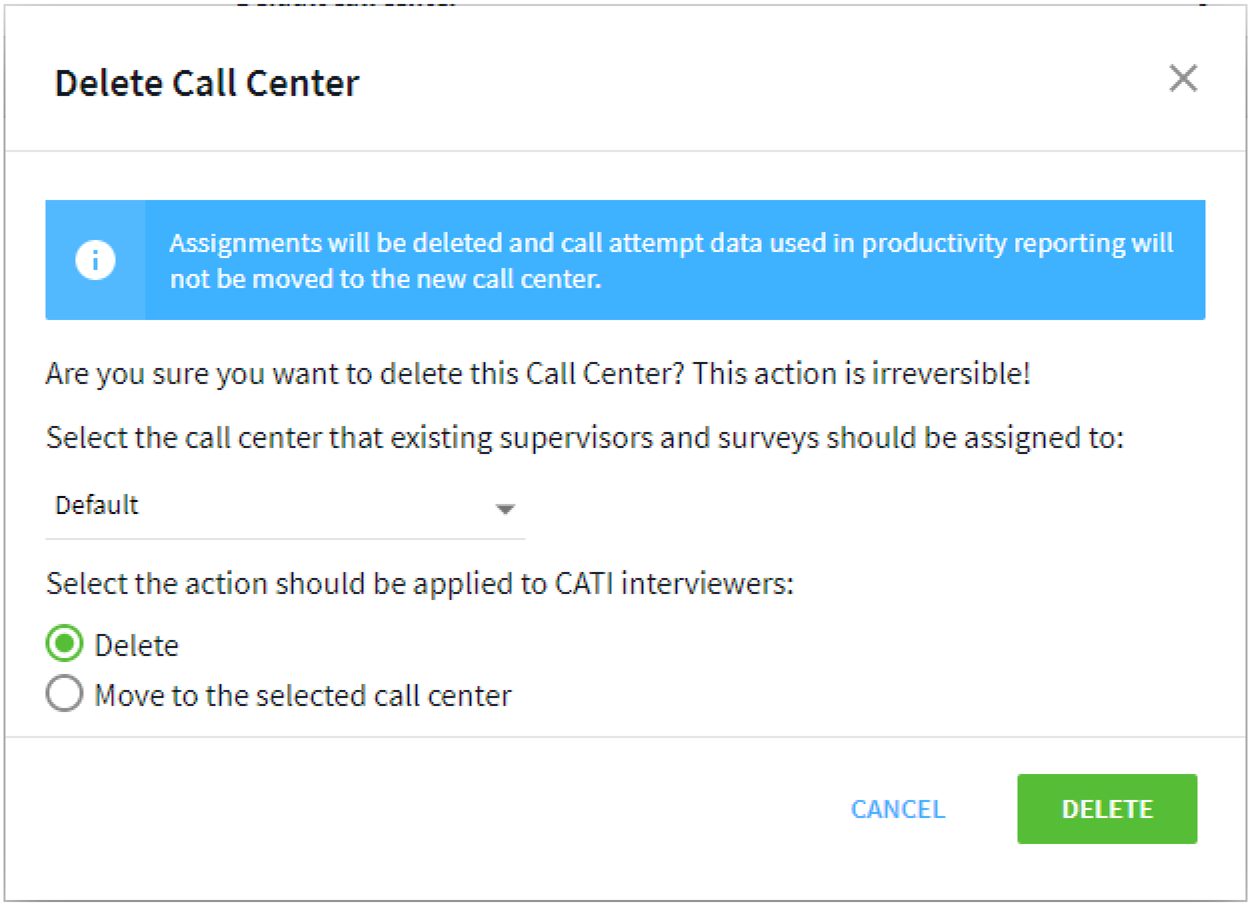


Figure 197 Configuring the deletion of a call center

In the drop down list select a call center to which all supervisors and surveys will be moved to. Surveys will be automatically activated in that call center, and supervisors will be automatically assigned to that call center as the result of this operation.

Next decide what should be done to the interviewers currently existing in the call center you are going 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 a target for moving supervisors and surveys to). 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 - all items will stay intact then).

4.3. Activating Surveys in Call Centers

Supervisor-"administrator" makes the survey accessible to "normal" supervisors when he/she activates this survey in some call center. The survey activated in a certain call center will be available only for supervisors who are assigned to work with this call center.

Any survey is automatically activated the moment it is launched in the Confirmit Authoring module in the CATI mode (refer to the corresponding Confirmit Authoring manual section for details). The launched survey is normally activated in the currently active call center (CURRENT call center - see (go to The Default and Current Call Centers on page 196 for more information)). The currently active call center (CURRENT call center) is the call center to which currently logged-in supervisor is assigned to - this call center is indicated in the dedicated section in the top frame of the CATI Supervisor module.

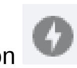
The procedure described below is used to activate a survey in any number of call centers from those available at the moment. Only one survey can be activated at a time.

Any number of surveys can be activated within a single call center. Any survey can be activated in any number of call centers.

A survey can be activated in a call center regardless of whether it is currently open or closed. Activation procedure does not change the survey open or closed state - it will remain in the state it was in before it was activated.

Mind that you can combine the activation and deactivation actions in one single procedure - see the instruction below.

To activate a survey in a call center (or a number of call centers)

1. Select Surveys under the Call Centers tab in the Navigation menu. The complete list of surveys activated in all available call centers will be displayed in the top right frame.
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 frame toolbar.

   This will display the Activate in Call Centers dialog window.

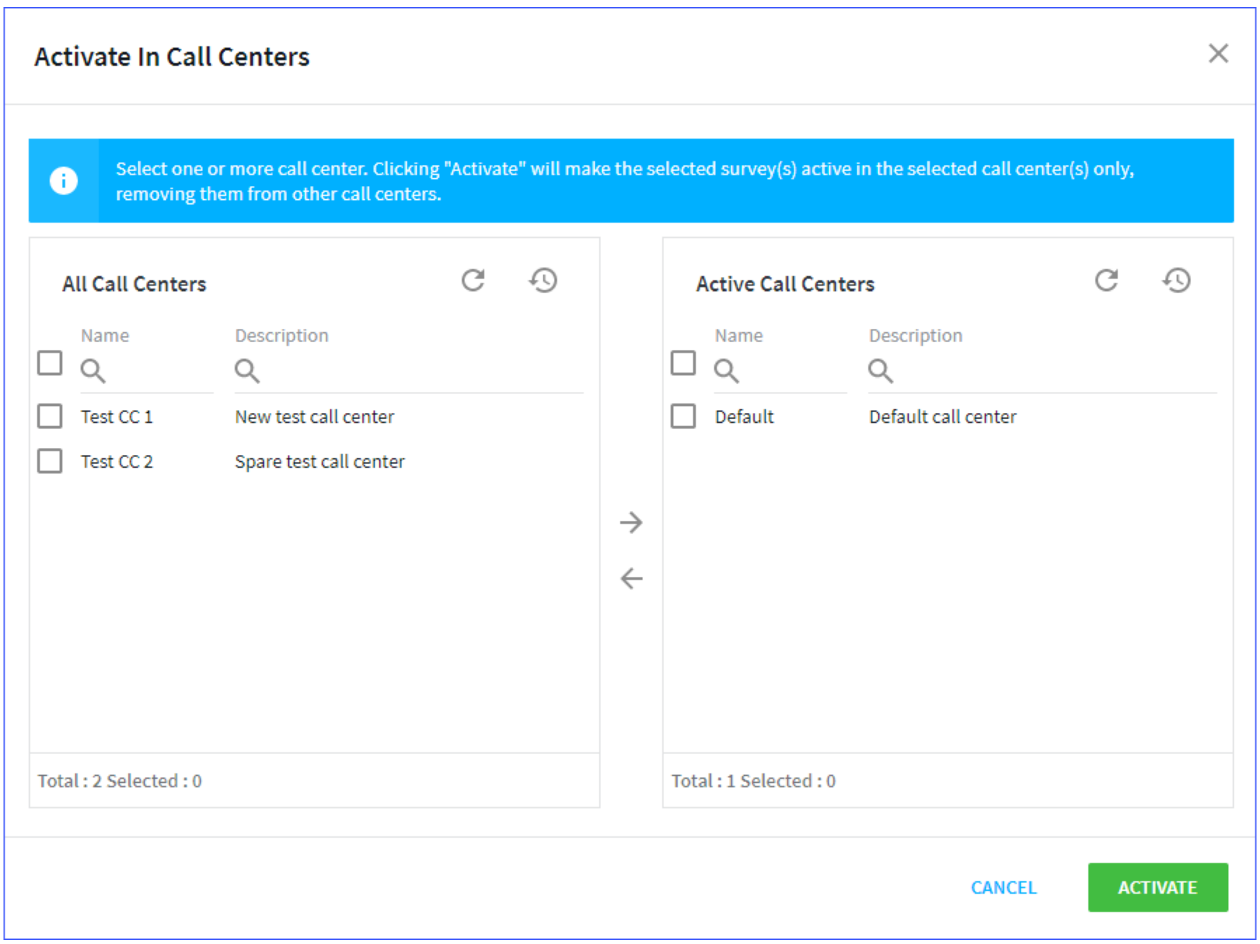


Figure 198 Activating survey in a Call Center

3. 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). Choose one or a number of call centers in the left frame by checking boxes next to their names.

4. When you are done selecting call centers click the arrow button located between the frames and pointing to the right. Checked surveys will disappear from the left frame and appear in the right one.

   Remember that surveys are activated only in the Call Center which is currently active - 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. This will close the window and execute the action for the chosen call centers.

You can combine the activating and deactivating actions in one single procedure. To do that first perform steps 3 and 4 to list the call centers for activation and next perform steps 3 and 4 as outlined in the deactivation instruction in (go to Deactivating Surveys on page 208 for more information). After the call centers for activation and deactivation procedures have been selected, click the Activate button below the frames to accomplish the actions.

4.4. Deactivating Surveys

An activated survey is available for conducting interviews in the call centers in which it was once activated (see (go to Activating Surveys in Call Centers on page 206 for more information) for reference).

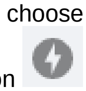
Supervisor-"administrator" can make survey unavailable in a call center in which it was once activated by deactivating it. A survey which is deactivated in the certain call center becomes invisible for "normal" supervisors who work in this call center. Deactivation procedure, similar to the activation procedure, is performed for certain call centers. Only one survey can be deactivated at a time.

Mind that you should not deactivate a survey while at least one interviewer continues to work with that survey.

Deactivating does not change the survey state - open surveys remain open, while closed surveys remain closed.

Mind that you can combine the activating and deactivating actions in one single procedure - see the instruction below.

To deactivate a survey in a call center (or a number of call centers)

1. Select Surveys under the Call Centers tab in the Navigation menu. The complete list of surveys activated in all available call centers will be displayed in the top right frame.
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.

   This will display the Activate in Call Centers dialog window.

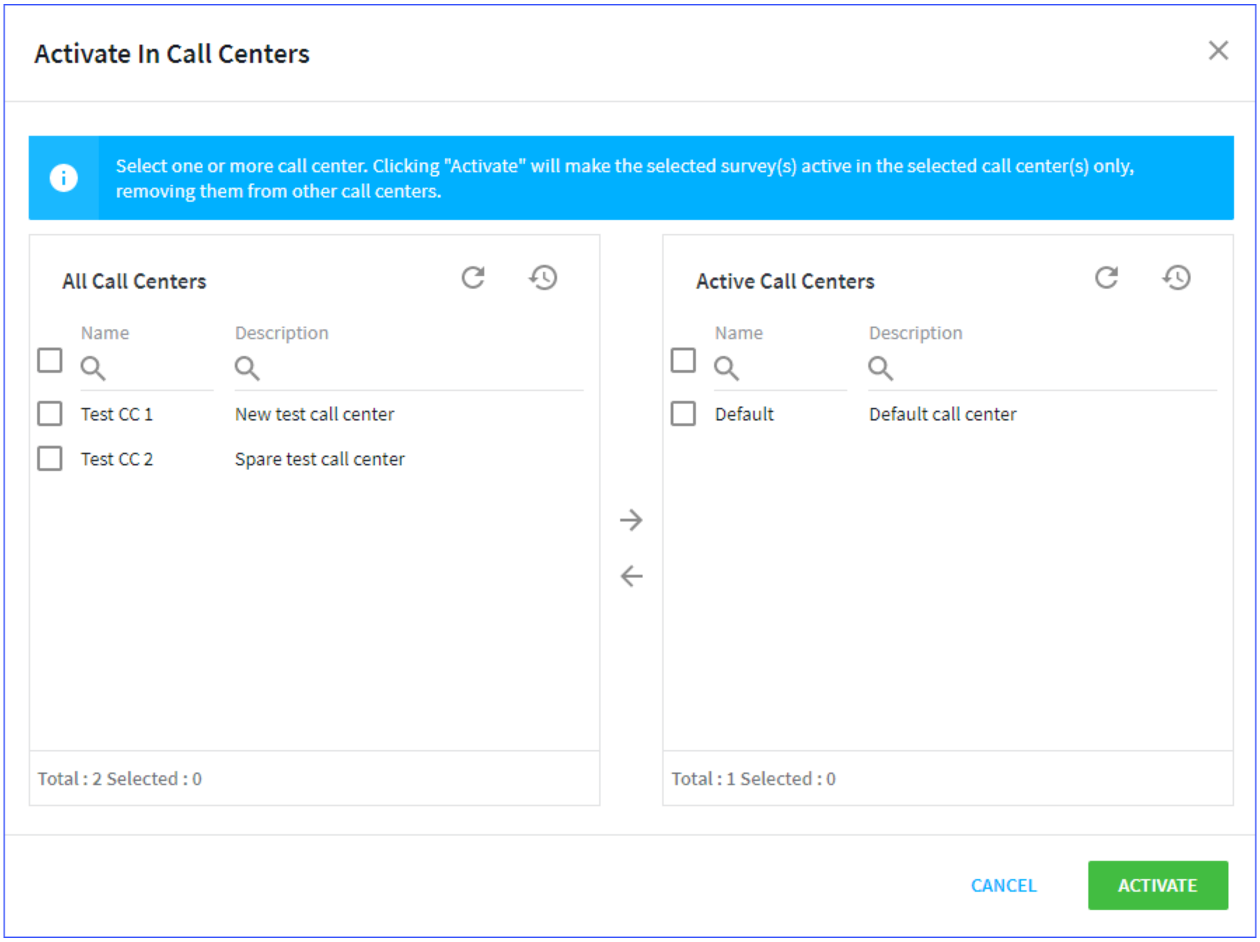


Figure 199 Deactivating survey in a Call Center

3. 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). Choose one or a number of call centers in the right frame (Active Call Centers) by checking boxes next to their names.
4. When you are done selecting call centers click the arrow button located between the frames and pointing to the left. Checked surveys will disappear from the right frame and appear in the left one.
5. To confirm your choice and deactivate the chosen surveys click the Activate button. This will close the window and execute the action for the chosen call centers.

   If the survey you are going to deactivate is currently in use (there is at least one logged-in interviewer who is working with this survey at the moment) a warning message will be displayed.

Before attempting to deactivate a survey make sure that there are no interviewers working with this survey at the moment.

6. Browse the list of surveys displaying the information regarding their activation and make sure the action was successful.

You can combine the activating and deactivating actions in one single procedure. To do that first perform steps 3 and 4 to list the call centers for deactivation and next perform steps 3 and 4 as outlined in the activation instruction in (go to Activating Surveys in Call Centers on page 206 for more information). After the call centers for activation and deactivation procedures have been selected, click the Activate button below the frames to accomplish the actions.

5. Scheduling Scripts

A scheduling script is a set of rules which contain instructions - they describe what CATI Supervisor module should do with a certain call and under which conditions.

The supervisor can create and add a number of scheduling scripts to CATI Supervisor module. All these scripts are available company wide and can be used with any survey that is conducted by the company. One script can be used with a number of surveys, but each survey can use only one scheduling script.

Normally a scheduling script should 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 (see (go to Viewing and Modifying a Survey's General Properties on page 72 for more information)). The default scheduling script is set automatically when the survey is added to the CATI system. The supervisor can choose another scheduling script any time later when he modifies 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 certain survey. Also 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 the Confirmit 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 scheduling rule with 'UpdateSample' in the rule Description field – see the Data Processing Manual for 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 should 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 action which should 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 which are used in the scheduling script
- **Custom script** (optional) – custom script can be used to perform specific actions not available via the GUI

Scheduling scripts are saved to a database and stored as XML descriptions. Saved scripts can be edited or deleted at any time later. Also the user can export and import Scheduling script descriptions in XML format.

5.1. Viewing the List of the Scheduling Scripts

To view the list of the Scheduling Scripts:

1. Choose the Scheduling tab in the Navigation frame.
2. This will display the list of all currently available Scheduling scripts in the top frame.

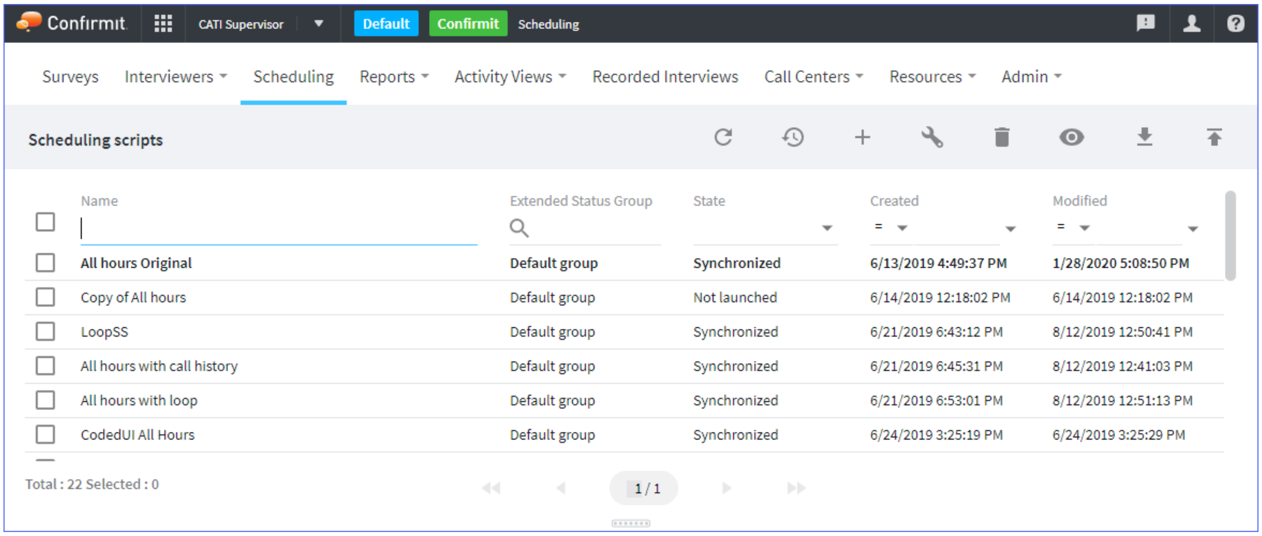


Figure 200 The Scheduling Script list

All listed scheduling scripts are available company wide and can be used with any survey which is run by the company.

3. Scheduling script list is displayed in the grid, one script per row. The following script properties are displayed in the grid columns - Name (the name of the script), State (current state of the script, see explanation below), Created (creation date and time), Modified (last modification date and time).

4. The list of scheduling scripts shows what state each script is currently in. The script state is displayed in the "State" column of the grid. It can have the following values:

- Not launched - the scheduling script has not been launched yet;
- Pending synchronization - changes have been made to the script since the last synchronization;
- Synchronized - the script definition is synchronized with the launched version.

5. All operations are performed on objects (scheduling scripts) you select in this list. The supervisor can perform the following operations with scheduling scripts:

- View and modify the scheduling script settings;
- Edit properties of the scheduling script;
- 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;

Operations are performed by either choosing commands from the shortcut menu (activated by right-clicking the grid row containing the appropriate survey), or by pressing buttons on the toolbar in the top right frame (the toolbar is located in the frame's title bar).

6. When the top right frame displays the list of surveys its toolbar contains the following object specific button set.

Button	Description	Function

	REFRESH	Updates the scheduling script list
	CLEAR SELECTION	Deselects all currently selected scheduling scripts at once
	VIEW	Displays the scheduling script settings in the bottom frame and allows them to be modified
	PROPERTIES	Displays the Script Properties dialog, allows editing the scheduling script properties
	NEW SCRIPT	Allows creating a new scheduling script
	EXPORT HISTORY LIST	Exports definitions of all selected scheduling scripts in XML format
	DELETE	Deletes all selected scheduling scripts
	IMPORT	Allows importing a description of a scheduling script in the XML format

5.2. Creating a New Scheduling Script

To create a new Scheduling Script:

1. To create a new scheduling script either:

- right-click any row in the Scheduling Script list (in the top right frame) and choose New Script from the context menu, or;
- click the New button in the top frame toolbar.

2. Any of the above listed actions brings up the New Script modal window, which you will use to specify parameters of the scheduling script you create.

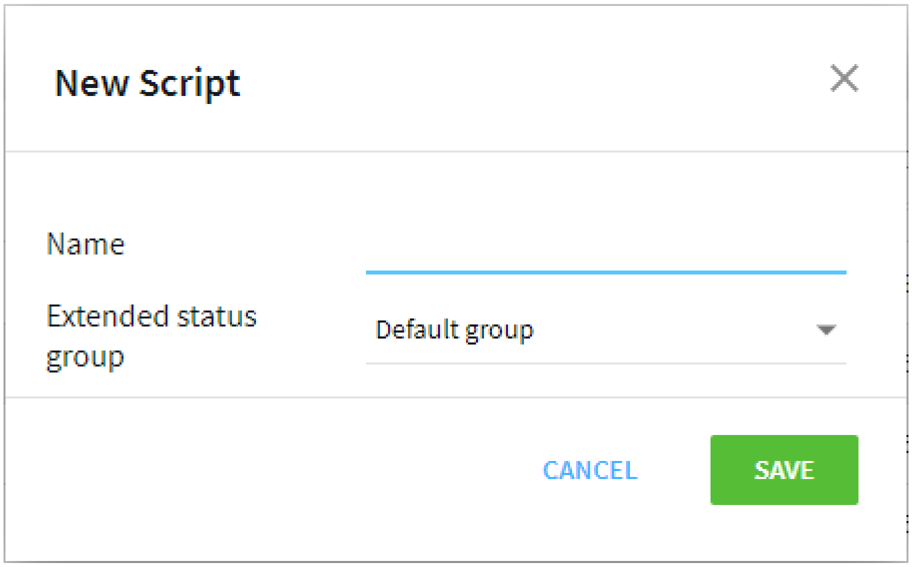


Figure 201 The New Script modal window

3. Specify the script name in the Name field.
4. Choose an extended status group for use with the scheduling script. You can select one from the list of available extended status groups - refer to (go to Configuring the Extended Status Groups on page 344 for more information) for information on what are these groups used for and how they are created. Or you may leave the Default group, which is suggested by default.
5. Click Save to add a new script to the scheduling script list.

The scheduling script you create this way needs to be configured. To configure a scheduling script you will have to modify its settings - see (go to Modifying Existing Scheduling Script Settings on page 215 for more information) for instructions on configuring the scheduling script.

5.3. Modifying Properties of an Existing Scheduling Script

For any existing scheduling script you can modify the following properties:

- the scheduling script name;
- the name of extended statuses group which is currently used with this script

To modify properties of an existing scheduling script:

1. To do this 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.

   This will display the Script Properties modal window.

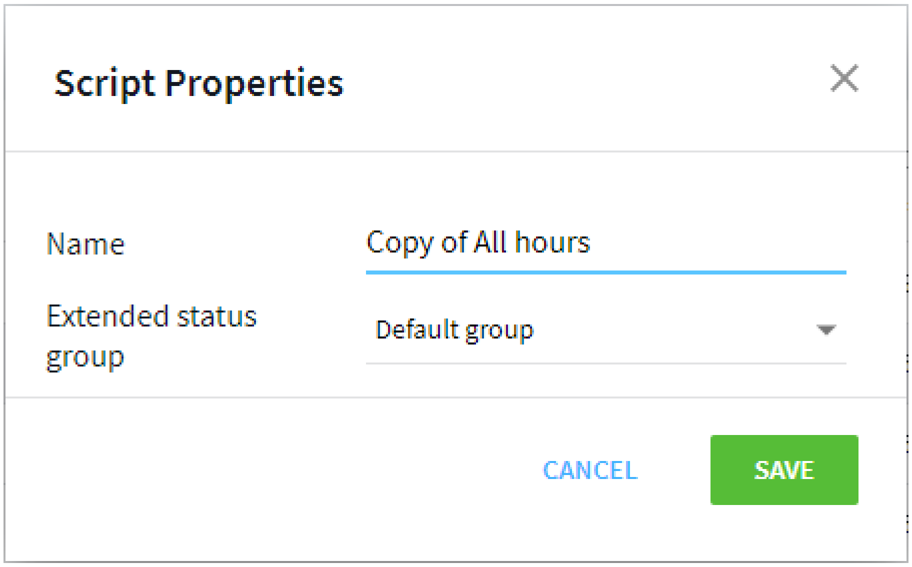


Figure 202 Modifying properties of the scheduling script

2. Modify the script name displayed in the Name field.
3. Change the extended statuses group which is currently used with the script. Choose another extended statuses group from the Extended status group drop-down list. You can choose from the list of available extended status groups - refer to (go to Configuring the Extended Status Groups on page 344 for more information) for information on what these groups are used for and how they are created.

   Note that only extended statuses belonging to the selected group will be available for creating sub-rules for this scheduling script (see (go to Specifying Scheduling Script Rules on page 224 for more information)).

   Information regarding the extended statuses group is neither exported, nor imported along with the scheduling script.
4. 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 more convenient to use particular scheduling script rules with surveys you run you may use this script's properties as the default.

To this end you should copy properties of the chosen Scheduling script to the default one (the "All Hours Original" scheduling script).

To copy properties of the chosen Scheduling script to the "All Hours Original" script (the default one) you should select a scheduling script in the list, right-click on 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 of the settings of the selected scheduling script.

The newly created default scheduling script will be assigned the "All Hours Original" name while the previous default scheduling script will get the name ending in "...backup (time/date stamp)" which shows the time and date this backup was created (go to Viewing the List of the Scheduling Scripts on page 210 for more information).

5.5. Viewing the Existing Scheduling Script Settings

The user can view and modify settings of any of the scripts displayed in the list in the top right frame. To view the existing Scheduling script settings:

1. Choose the Scheduling object tab in the left Navigation frame of the CATI Supervisor window to display the list of scheduling scripts in the top frame.

2. Either right-click the required script in the list of scheduling scripts in the top frame and choose **View** from the shortcut menu, or select the required script in the grid and click the **View** button  on the toolbar.

   The selected script settings are displayed in the bottom frame.

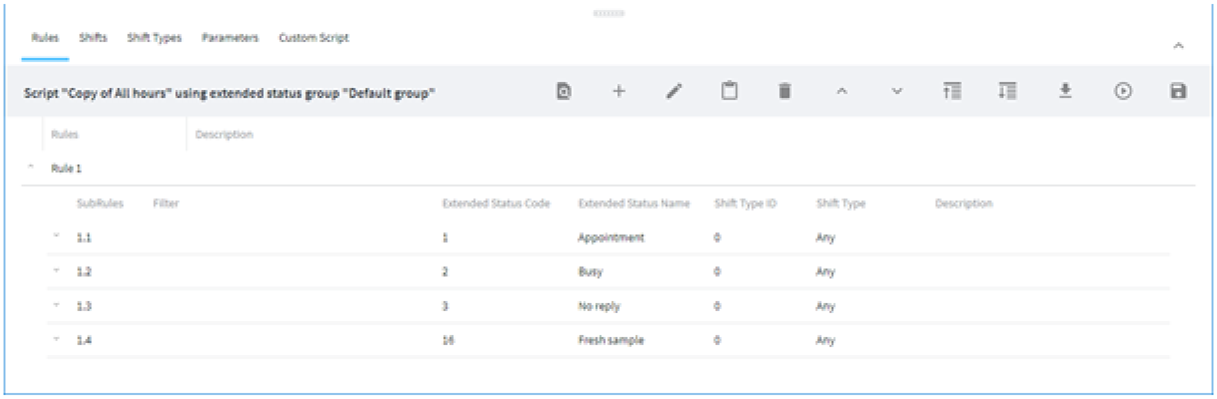


Figure 203 Viewing the script settings in the bottom right frame

The bottom right frame uses tabbed interface to display the scheduling script settings. Use the tabs to view and modify the following script settings:

- **Rules** – this tab is used for specifying rules to be applied to the call (go to Specifying Scheduling Script Rules on page 224 for more information).
- **Shifts** – this tab is used for specifying shifts during which the script should be active (go to Specifying Shifts and Exclusions for Use with the Scheduling Script on page 218 for more information).
- **Shift types** – this tab is used for specifying shift types (shift types are required for correct specification of the shifts) (go to Specifying the Shift (Exclusion) Type on page 216 for more information).
- **Parameters** - this tab is used for managing parameters which can be used with any action added to the script (go to Parameterized Scheduling Scripts on page 228 for more information).
- **Custom script** – allows entering any custom code you wish to use with the script (this code is intended for execution when the “Run specified script” action is defined for a sub-rule) (go to Writing a Custom Scheduling Script Code on page 232 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 Existing Scheduling Script Settings on page 215 for more information).

5.6. Modifying Existing Scheduling Script Settings

The scheduling script settings include specifications of the time period (or “shift” in the Confirmit terms), the system event, and the interview state which precisely point at the moments when this script should be run.

Shifts describe the particular recurring time periods during which the script can be run. The shift start is indicated by the day of the week and the time within that day, and the shift end is also indicated by the day of the week and the time within that day. The whole set of shifts you specify for a week is then repeated each week during one year (the default parameter used by the CATI Supervisor module).

To help you fine tune the specified schedule the CATI Supervisor module allows specifying exclusions, which are one-time periods, during which the script should not be active. This helps to exclude holidays, or certain time and date ranges from the specified schedule. Exclusions never recur – exclusion start time is specified by the particular date and the time within that date, and its end time is also specified by the particular date and the time within that date.

For example, you have scheduled the script to run each Monday and Wednesday starting from 09:00, and ending at 18:00. This means it can be run each Monday and Wednesday during one year (counting from the first day it was run) from 09:00 to 18:00. But the next state holiday falls on Monday. The system is not supposed to function that day, and you should exclude this particular date from the schedule. You can specify the date, and then the start and end time within that date. The system will not run the script during the specified exclusion time.

Both shifts and exclusions are specified only for particular time zones. You cannot assign one and the same shift or exclusion to different time zones. See Configuring the Master Timezone List and Configuring the Active Timezone List for more details on time zones. Shift overlap for a single time zone is prohibited.

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 any other logical attribute – this facilitates the scheduling rules creation (go to Specifying Shifts and Exclusions for Use with the Scheduling Script on page 218 for more information).

The other important scheduling script parameter is a set of rules, which 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 when a call (an interview) 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.

Any scheduling script configuration procedure must start with shift type specification. After all the required shift types and shifts belonging to that type are specified, you can proceed with adding rules (since all the rules are specified for particular shifts only).

The configured scheduling script can be discarded, or saved. It can also be saved and launched simultaneously. A saved script is stored in the Confirmit database and can be accessed for editing or launching at any time later. A launched script is scheduled for execution according to the specified rules.

Refer to the following sections for descriptions of script configuration procedures related to the appropriate tabs.

5.6.1. Specifying the Shift (Exclusion) Type

Note that you should create new or check the existing shift types first, before you start adding new or editing the existing shifts and/or scheduling script rules.

To specify the shift (exclusion) type:

1. With the scheduling script opened in the View mode (see Viewing the Existing Scheduling Script Settings for details), choose the Shift Types tab in the bottom right frame. This will display the list of existing shift and exclusion types.

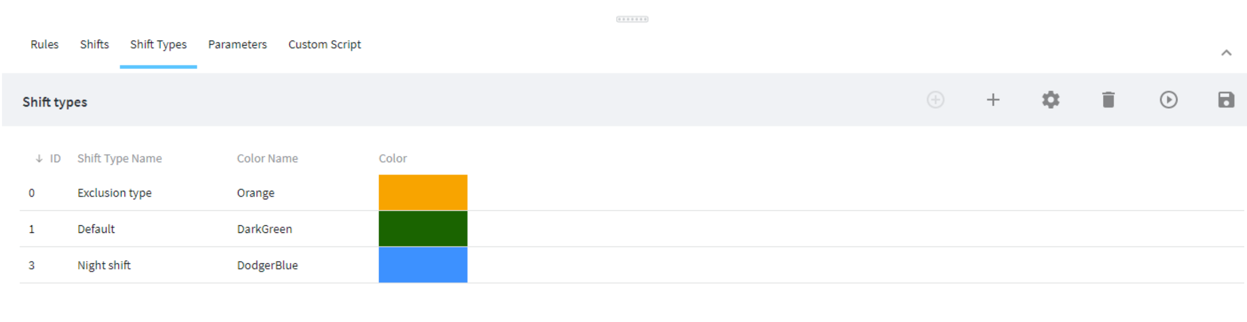


Figure 204 Creating shift and exclusion types using the Shift Types tab

2. Using this tab's interface you can create new, edit and delete existing shift and exclusion types. 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.

   Actions are applied only to the item currently selected in the list, or to the item that you right-click upon.

To create a new shift type you should click the New Shift button on the toolbar, and to create a new exclusion type you should click the New Exclusion button on the toolbar.

Note that an exclusion does not have different types - you can create only one exclusion type. The New Exclusion button becomes inaccessible when an exclusion type already exists (see the illustration above - the shift type list already contains an exclusion, and the New Exclusion button is grayed out).

Choosing the New command from the context menu invoked by clicking the shift type item creates a new shift type, and choosing the New command from the context menu invoked by clicking the exclusion type item creates a new exclusion type.

3. The New command displays the New Shift Type dialog, while the New Exclusion command displays the New Exclusion dialog as shown in the picture below.

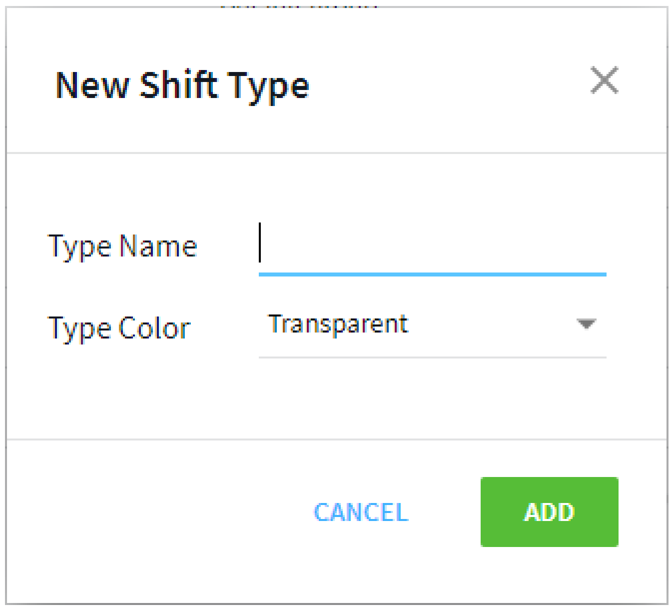


Figure 205 Adding a new shift type

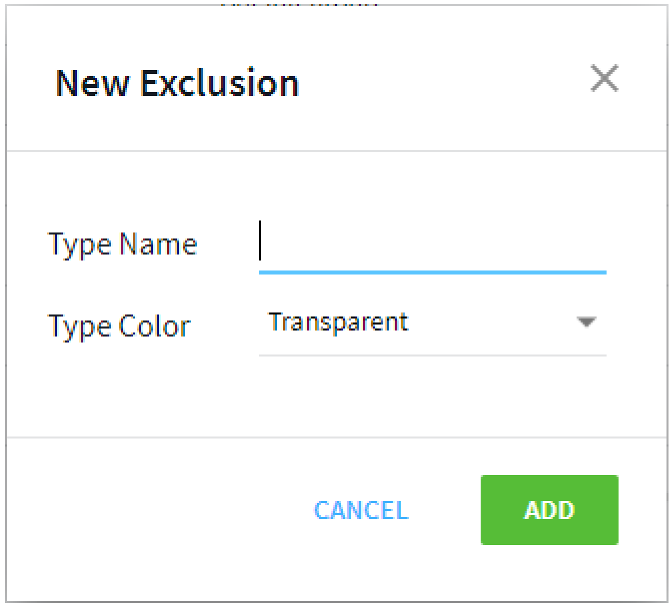


Figure 206 Adding a new exclusion type

Enter the shift (exclusion) type name in the Name field, then select the color in the Color field. 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 you should 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.

   This will bring up the dialog you have used to create that item. The dialog fields will contain the current settings. Edit them as required and click OK to confirm the changes.

5. You can now proceed with specifying shifts and exclusions using the Shifts tab (go to Specifying Shifts and Exclusions for Use with the Scheduling Script on page 218 for more information).

5.6.2. Specifying Shifts and Exclusions for Use with the Scheduling Script

In CATI Supervisor shifts and exclusions are displayed and managed on a "weekly" basis. The interface in the Shifts tab shows existing shifts and exclusions as a list and simultaneously as a diagram that visually distributes listed shifts and exclusions by days of a single week . This means that you are managing shifts and exclusions as parts of "workdays" of one week.

Each shift that you create/edit for the current week will recur - the same shift pattern as set for the current week is applied to ALL weeks in the future.

You can also add and edit exclusions on the Shifts tab. Exclusions are created and edited similar to the shifts, but any 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 week in the future you have to 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. To learn about adding and managing shift types refer to Specifying the Shift (Exclusion) Type.

CATI Supervisor allows managing shifts and exclusions in a number of time zones simultaneously. The default time zone is the respondent time zone, and this is the only time zone which is available for shift/exclusion managing purposes initially. 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 the "default" shifts and "default" exclusions. Default shifts and exclusions are marked appropriately in the list (marked as "Default" in the Shift Status column) and they are highlighted with the dedicated color (see the diagram legend) on the diagram.

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 401 for more information).

When a time zone other than the default time zone has been added to the Shifts tab interface, you can start creating and managing shifts and exclusions in this time zone also. 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 and the same time zone cannot overlap at any circumstances. In case you specify the shift time limits that overlap with another shift the 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.

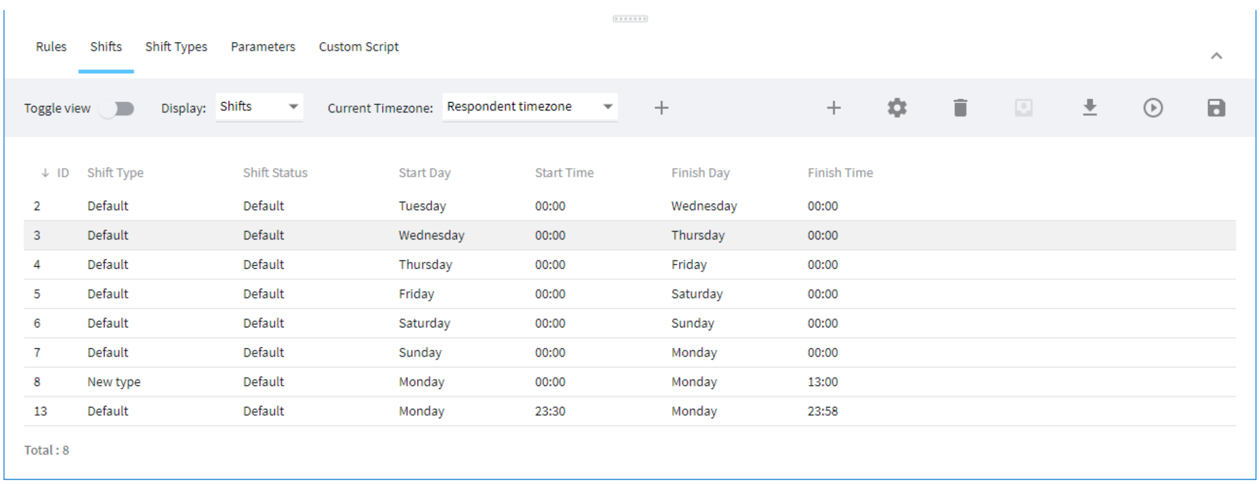
Shifts belonging to different time zones can overlap. However, if you try to create a shift in the Default (Respondent) time zone that intersects with a shift in another time zone, CATI Supervisor warns you of such intersection and prevents creation of such shift in the Default time zone.

When you create a shift in a time zone other than Default (Respondent) and it intersects with the Default shift the CATI Supervisor lets you create such a shift, but automatically marks the Default shift as "Has Overridden" in the Shift Status column.

When you change current time zone to any other than the Default (Respondent) and open a Default shift properties for editing and save it - 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 (see Viewing the Existing Scheduling Script Settings for details), choose the Shifts tab in the bottom right frame. This will display the list of existing shifts.



ID	Shift Type	Shift Status	Start Day	Start Time	Finish Day	Finish Time
2	Default	Default	Tuesday	00:00	Wednesday	00:00
3	Default	Default	Wednesday	00:00	Thursday	00:00
4	Default	Default	Thursday	00:00	Friday	00:00
5	Default	Default	Friday	00:00	Saturday	00:00
6	Default	Default	Saturday	00:00	Sunday	00:00
7	Default	Default	Sunday	00:00	Monday	00:00
8	New type	Default	Monday	00:00	Monday	13:00
13	Default	Default	Monday	23:30	Monday	23:58

Figure 207 The Shifts tab showing the shift list

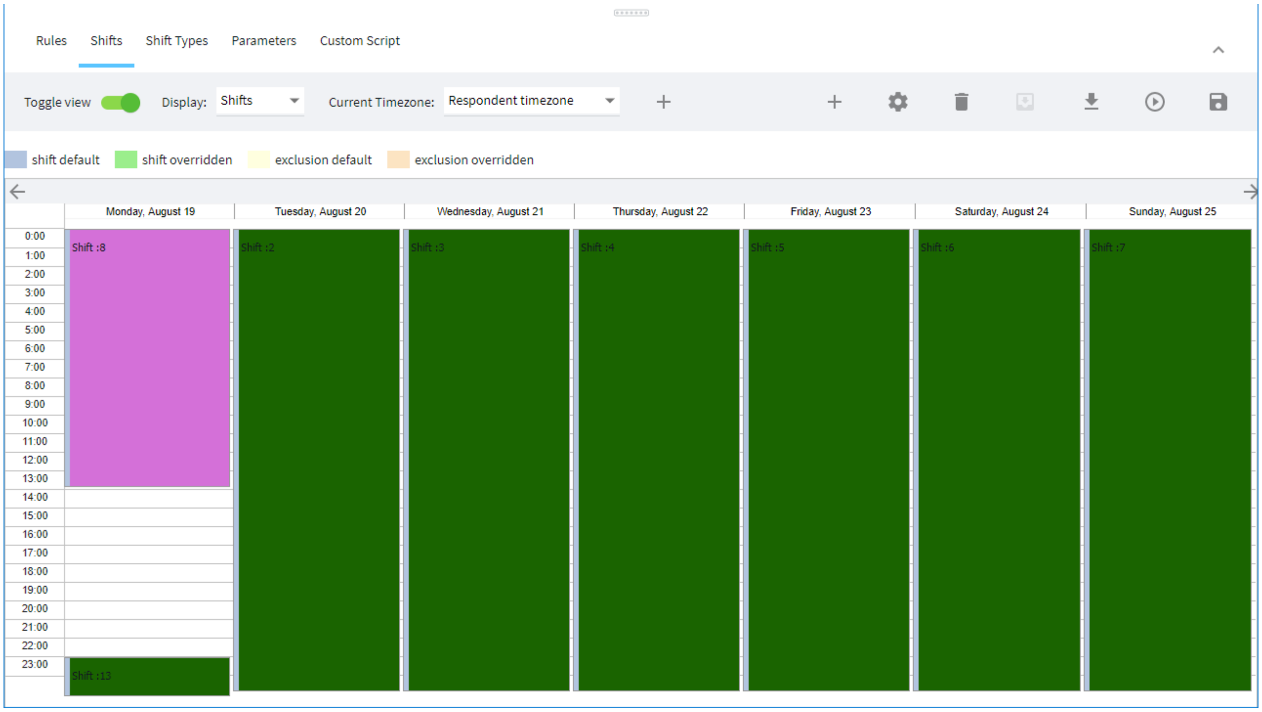


Figure 208 The Shifts tab showing the corresponding shift color diagram

2. The Shifts tab can display either the existing shift and exclusion list, or a corresponding color diagram. The user can select the required view with the use of the Toggle view slider control - when enabled, it replaces the list view with a corresponding color diagram.

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 below 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 overlapping with already existing Current shift in another time zone.

You can choose the type of items to display by choosing from the Display drop-down list located in the frame title bar: “Shift” mode will display only shifts, “Exclusion” will display only exclusions, and “Both” mode will display shifts and exclusions simultaneously.

The diagram presents listed items visually – all shifts and exclusions are presented as diagram bars of a certain color. All diagram bars use colors assigned to the appropriate shift types and those shown in the legend above the diagram to display and highlight certain shifts and exclusions.

All diagram bars representing shifts are assigned colors that were specified for shifts of the appropriate type.

The diagram legend (right below the item list) 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 header row of the diagram shows week days and particular 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 upon.

Choosing the New command from the context menu invoked by clicking the shift item creates a new shift, and choosing the New command from the context menu invoked by clicking the exclusion item creates a new exclusion.

You can also export the defined shift or exclusion description.

4. To start adding a shift or exclusion you should first select a time zone to which this shift will be added. From the Current time zone drop-down list select the time zone you wish to add the new shift (exclusion) to. If the time zone you need is not on the list, you should add it by pressing the Add button (to the right of the Current time zone drop-down box), and choosing one from the displayed list.

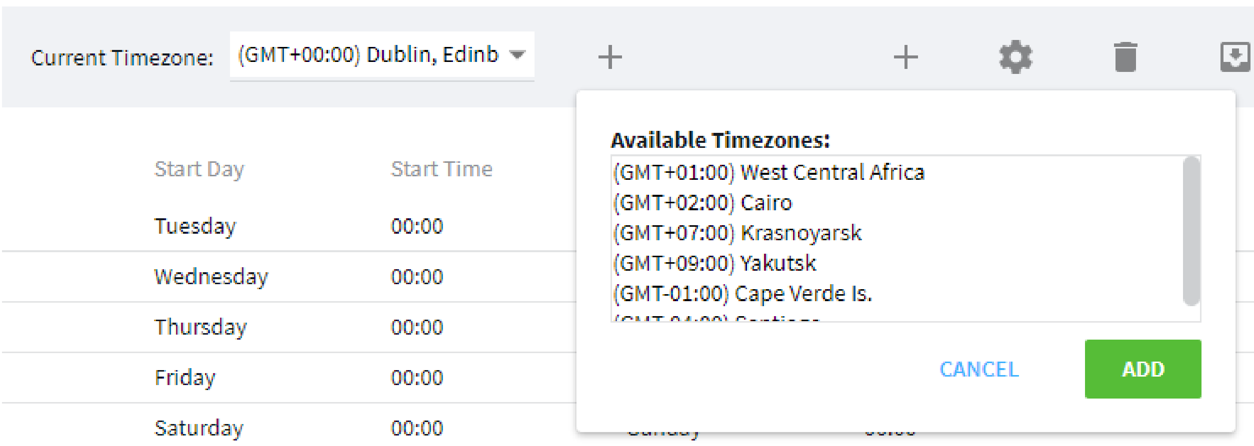


Figure 209 Adding a time zone

If the required time zone is absent in this list, you should make it active, so that it could appear in the time zone list. For more information on making the time zone active refer to Activating the Selected Master Timezone.

5. Next you can add a new shift or exclusion. This operation is almost similar for both. The only thing is 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).

   The New command displays the dialog box as shown in the picture below.

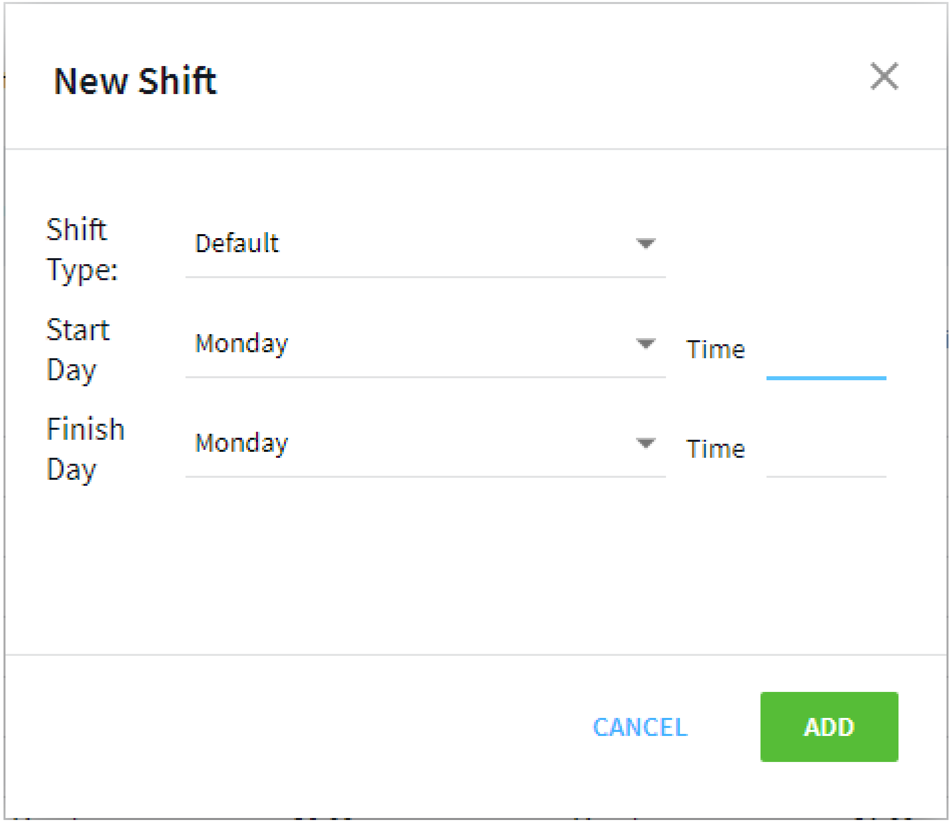


Figure 210 Adding a new shift

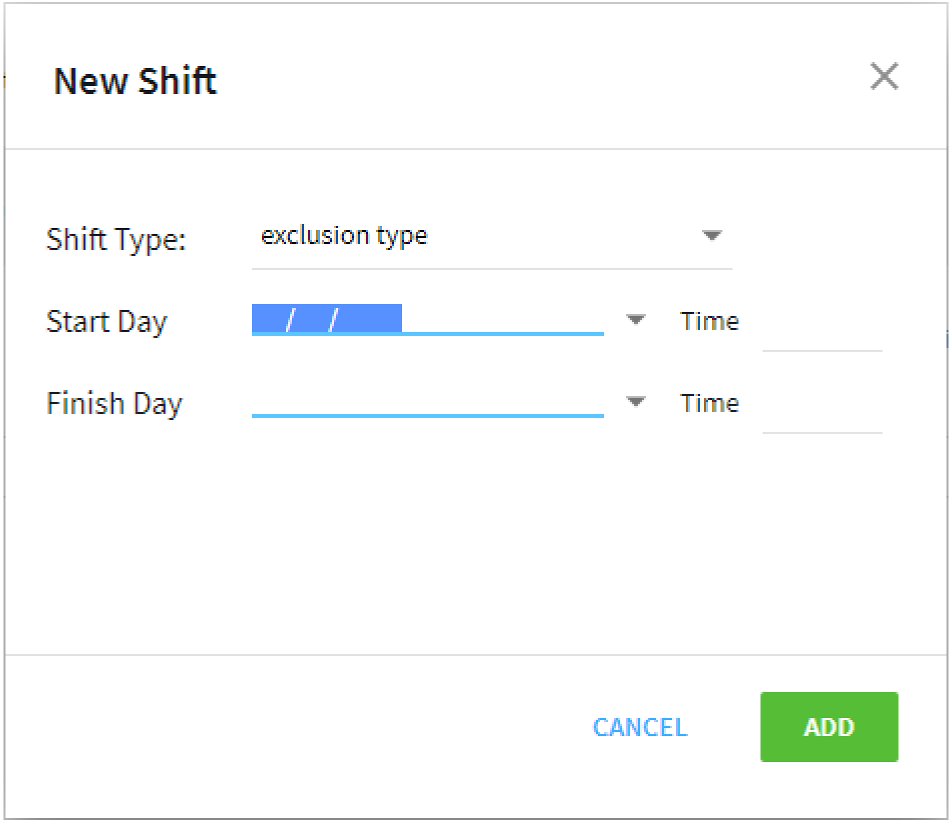


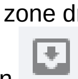
Figure 211 Adding a new exclusion

Choose the shift (exclusion) type in the Shift type field. For a shift select the Start Day of the week and enter the start time (in HH:MM format), then select the Finish Day of the week and enter the finish time. For an exclusion enter (in DD/MM/YYYY format), or select the Start Day (pressing the down arrow in the field that displays the calendar control) and the start time (in HH:MM format), then enter the Finish Day and the finish time.

Remember that shifts are always recurring, while exclusions are one time events.

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.

6. 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), and treated as default, also. To do so you should choose the required time zone from the Current time zone drop-down list, then choose the required shift in the shift/exclusion list, and click the Set Default button  on the toolbar, or right-click this shift in the list and choose Set Default from the context menu..

7. If you wish to edit any of the listed shifts you should 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. Again, shift editing operation is available only in the “Shifts” display mode, and exclusion editing – only in the “Exclusions” display mode (selected using the Display drop-down box).

   This will bring up the dialog you have used to create that item. Dialog box fields will contain the current settings. Edit them as required and click OK to confirm the changes.

8. You can proceed with specifying scheduling rules using the Rules tab then.

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 itself is in fact a container. To correctly define a rule you should specify at least one sub-rule for this rule (for example, which tells what extended status during which shift will trigger the script), and one action for this sub-rule (for example, which tells what kind of action and how should be executed when the sub-rule is satisfied). Any number of sub-rules is allowed for a rule, and any number of actions is allowed for a sub-rule.

You can search through an existing scheduling script for particular rule, sub-rule or action (go to Searching for a Particular Rule, Sub-rule or Action in the Scheduling Rules List on page 228 for more information).

To specify a scheduling script rule:

1. With the scheduling script opened in the View mode (go to Viewing the Existing Scheduling Script Settings on page 214 for more information).

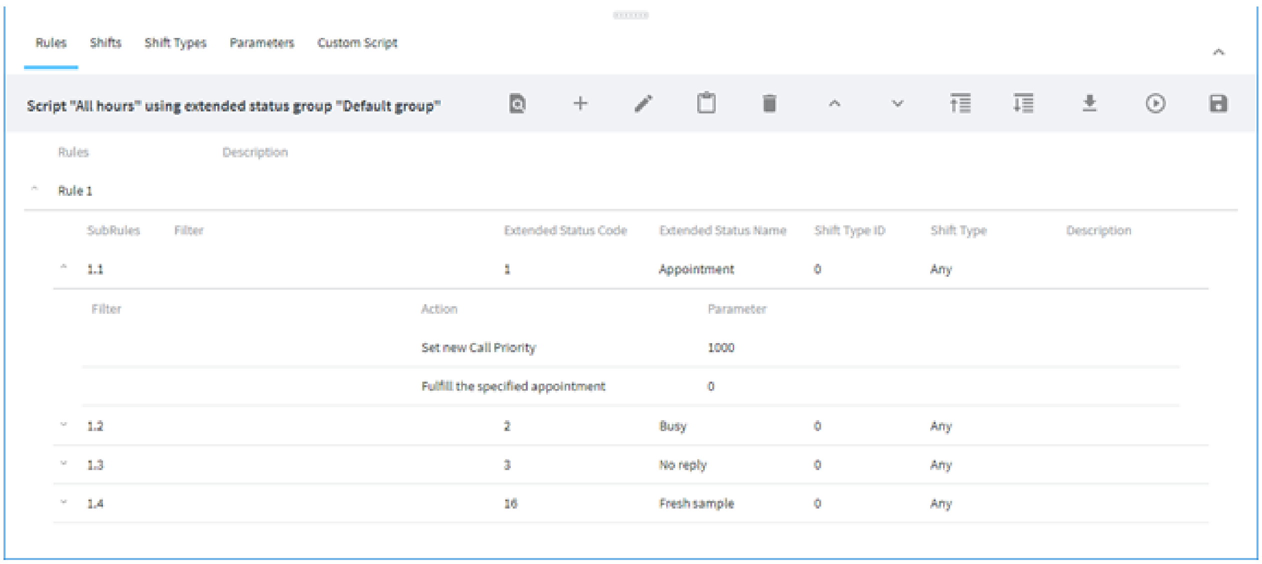


Figure 212 Viewing the scheduling rule list for the selected scheduling script

- Scheduling rules are presented in the list in the hierarchical form – the sub-rules are presented as branches of the appropriate rules, and actions are presented as branches of the appropriate sub-rules.
- Normally the sub-rules and actions are executed in the order they are listed – higher items are executed first.
- By default all listed items are collapsed – you can expand any item by clicking the plus sign in front of its name. Alternatively 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 are available both through the use of the buttons located on the toolbar above the list, or through commands contained in the context 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 be pasted only into the same scheduling script. All items are copied alone, without sub-items (e.g. 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).

Rule

The New command for a rule displays the dialog box as shown in the picture below.

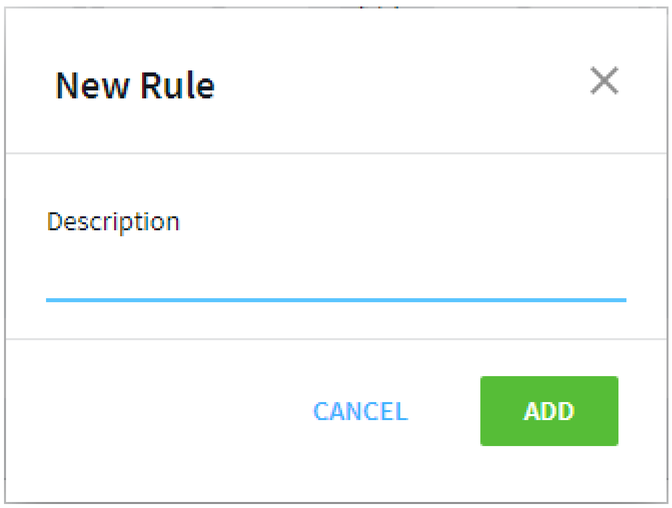


Figure 213 Adding a new scheduling rule

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.

Sub-rule

The New command for a sub-rule displays the dialog box as shown below.

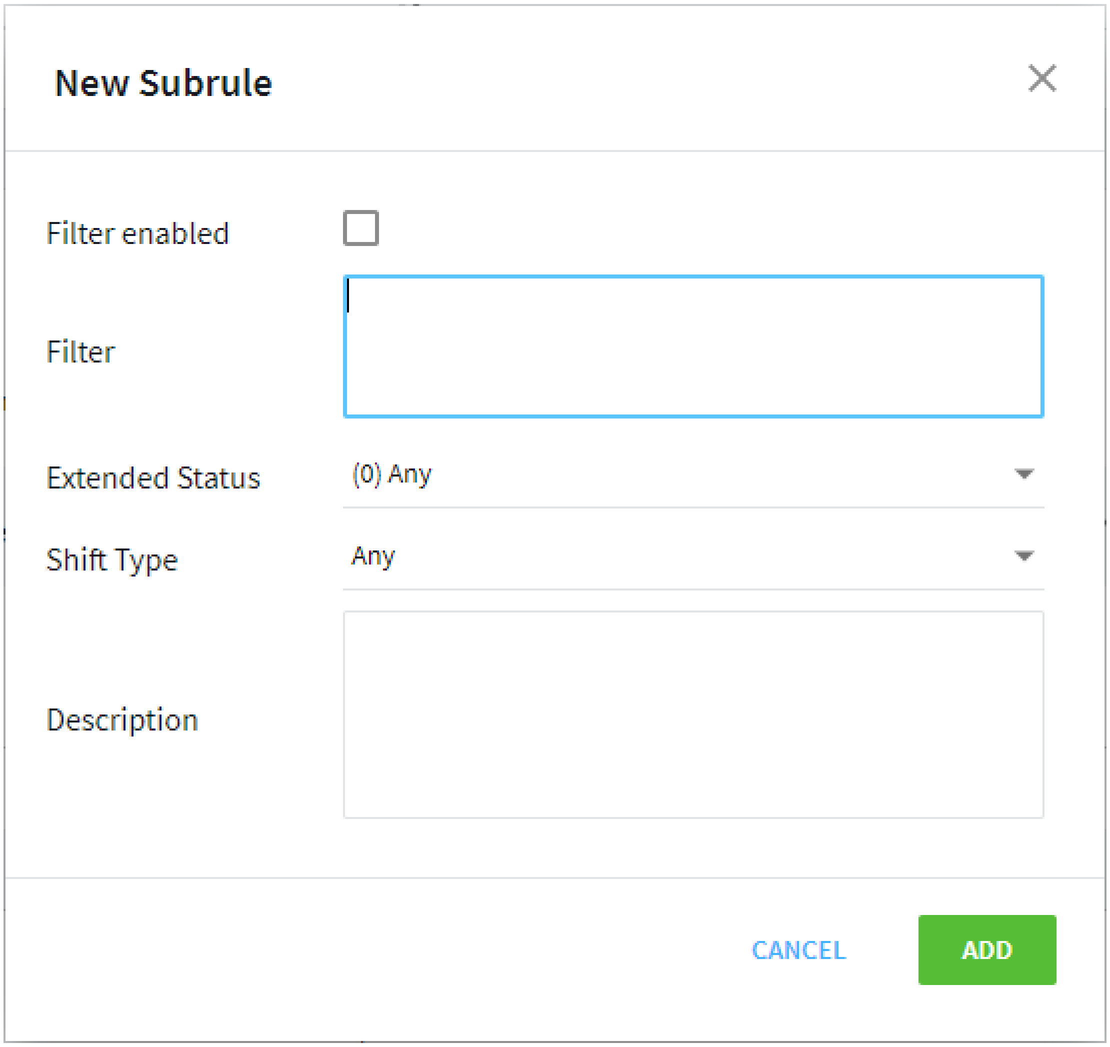


Figure 214 Adding a new sub-rule

1. Enter the filter expression in the Filter field (in case you need to apply this sub-rule only to the 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 box as shown below.

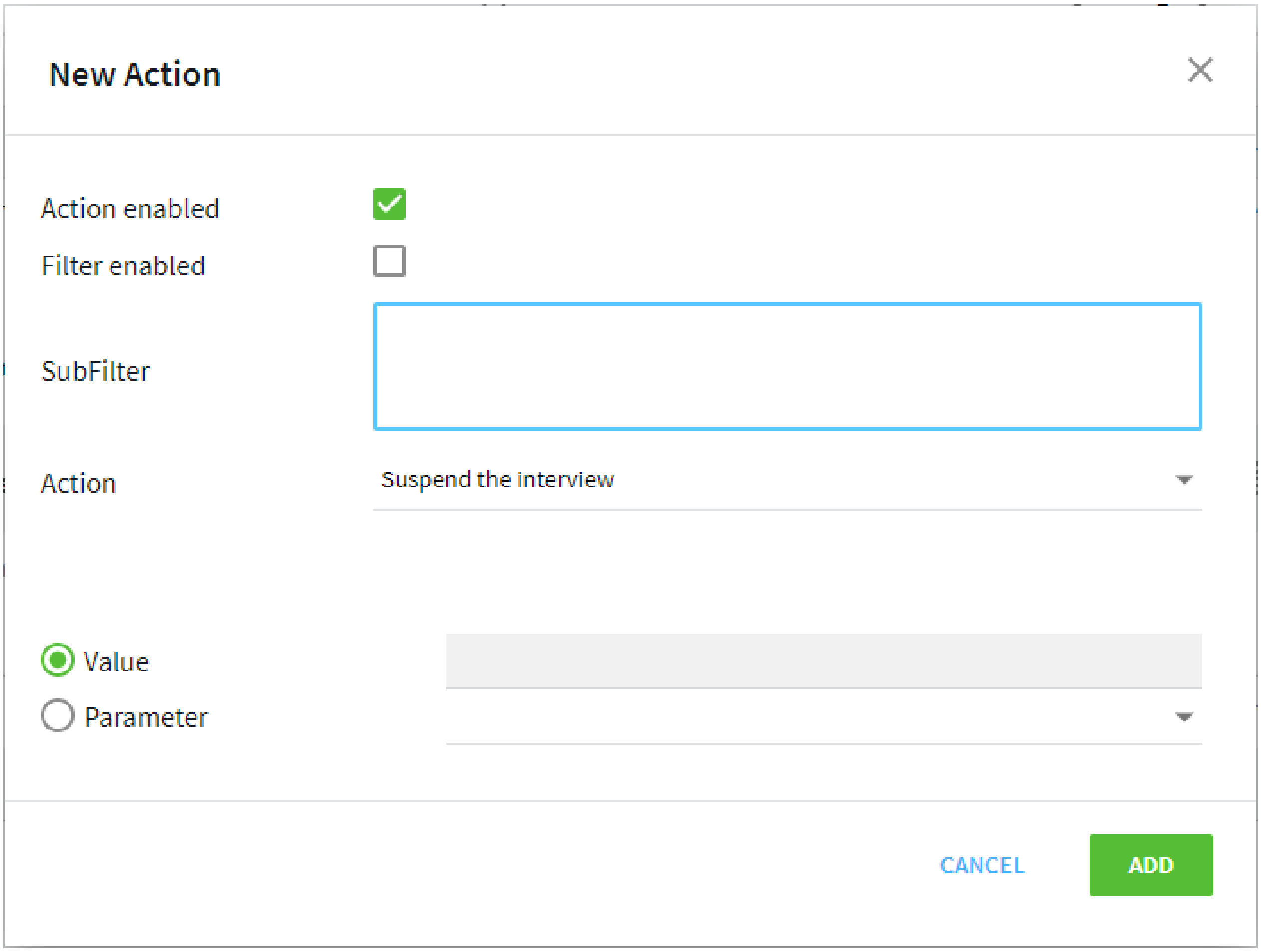


Figure 215 Adding a new action

The Action enabled box is checked by default. Clear it to disable this action.

1. Enter the filter expression in the SubFilter field (this subfilter expression is added to the sub-rule filter expression, and the action subfilter is applied after the sub-rule filter). Refer to the Scripting in Confirmit guide for instructions on how you can use different functions to build a subfilter expression.
2. Check the Filter enabled box above 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 below the Action drop-down box allows you to enter the parameter value in the event this is required by the selected action type (the Value field then becomes accessible). A prompt appearing between these fields is context sensitive – it will tell you the meaning of the parameter, the required format and the correct parameter limits (if such is assumed).

   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 228 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 call disabling and enabling. Normally these actions can be performed only manually, when these properties are explicitly set in the appropriate dialog windows.

   Refer to Appendix A for the complete action parameter description list.

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 with an attribute value matching specified condition. To search the scheduling rule list:

1. With the scheduling script opened in the View mode (see Viewing the Existing Scheduling Script Settings for details), choose the Rules tab in the bottom right frame.
2. Click the **Search** button in the bottom right frame title bar. This will display the following dialog box.

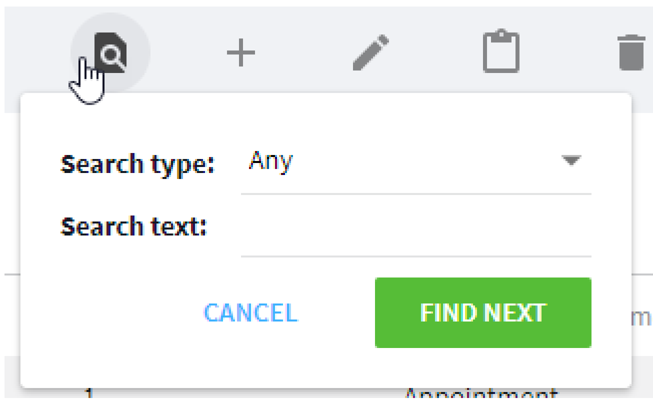


Figure 216 Searching the scheduling rule list

3. In the Search type drop-down box select an attribute to search through. Enter the search string in the Search text field – wildcards 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 this dialog box.

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 currently.

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 106 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 214 for more information).
2. Change to the Parameters tab. This tab may appear empty if no parameters were added to the script before. Otherwise the available parameters are displayed in the grid - one parameter per row.

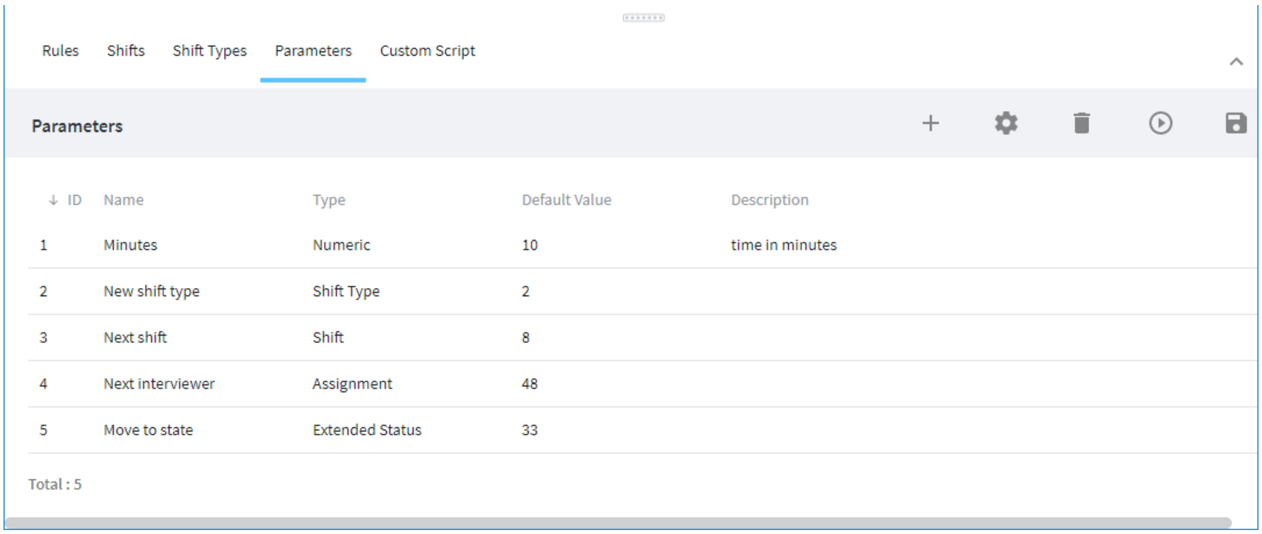


Figure 217 Viewing the scheduling script parameter set

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. This will display the New Parameter dialog.

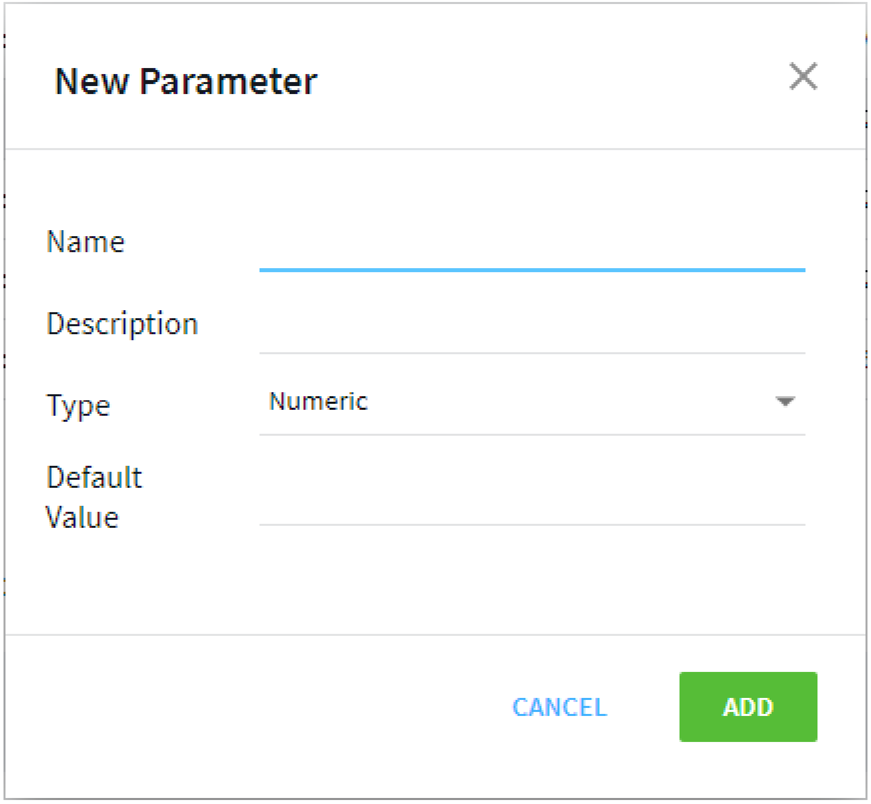


Figure 218 Adding a parameter to the scheduling script

4. Enter the Name and Description of the parameter in the corresponding fields (in the free form).
5. Choose the parameter type from the Type drop-down list. The following types are supported:

- Numeric - simply an integer. Can be used with any action which supports numerical values;
- Shift - values that are supported for use with the appropriate action (see (go to Appendix A - Action Parameter Descriptions on page 472 for more information) for reference);
- Shift type - values that are supported for use with the appropriate action (see (go to Appendix A - Action Parameter Descriptions on page 472 for more information) for reference);
- Assignment - values that are supported for use with the Assign User/Group action (see (go to Appendix A - Action Parameter Descriptions on page 472 for more information) for reference);
- Extended status - the Extended status ID.

6. Next enter the default parameter value in the Default Value field (see the supported value types list above). This value will be used for all actions with which this parameter is used (see (go to Specifying Scheduling Script Rules on page 224 for more information) for instructions on how to use parameters with actions added to the scheduling script).
7. Click Add to add the created parameter, or Cancel to close the dialog and discard changes.

To edit an existing parameter:

1. Display the Script View in the bottom right frame for the required scheduling script (go to Viewing the Existing Scheduling Script Settings on page 214 for more information).
2. Change to the Parameters tab. Select the required parameter in the list and either click the Edit button  on the toolbar, or right-click any grid row and choose Edit from the context menu that appears. This will display the Add Parameter dialog.

3. Dialog fields are already filled with current values - modify the values as required.
4. Click Add to save the modified parameter, or Cancel to close the dialog and discard changes.

To delete an existing parameter:

1. Display the Script View in the bottom right frame for the required scheduling script (go to Viewing the Existing Scheduling Script Settings on page 214 for more information).
2. Change to the Parameters tab. Select the required parameter in the list and either click the Delete button on the toolbar, or right-click any grid row and choose Delete from the context menu that appears.
3. CATI Supervisor will ask you to confirm the action by displaying the appropriate dialog box. Click OK to delete the parameter, or Cancel to close the dialog without deleting the parameter.

To save and, optionally, launch the saved script:

1. Just like you should do after modifying any scheduling script setting, you should save and launch (if this is required right away) the scheduling script after you change the parameter settings.

   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 (see Viewing the Existing Scheduling Script Settings for details), choose the Rules tab in the bottom right frame.
2. Select a rule, sub-rule, or action and right-click on it. The item is copied without siblings.
3. Select a row in the grid below where you would like to paste the copied item. Note that the copied item will still be inserted on the appropriate hierarchy level – a rule on a rule level, a sub-rule – on a sub-rule level and so on.
4. Right-click the selected row or click the Paste button in the bottom frame 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 214 for more information), choose the Rules tab in the bottom right frame.
2. Click the **Export** button in the bottom right frame toolbar. This will display the standard browser dialog box prompting you to choose what to do with the saved XML data.
3. Click the **Save** button. This will display the standard Windows Save As dialog box.
4. Enter the file name and and path to save the file in XML format, and click the **Save** button.

   The scheduling script definition is then saved to a file in XML format.

If you click the **Open** button, the scheduling script definition in XML format 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 what rule, sub-rule, or action is selected in the grid in the Rules tab). This command performs the same action as the Scheduling script export command available from the top right frame toolbar .

5.6.7. Changing the Order in which Rules, Sub-rules, and Actions are Executed

Normally 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 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. The same is true for an action – it can be moved only within the limits of a sub-rule.

To change the rules, sub-rules, and actions execution order:

1. With the scheduling script opened in the View mode (see Viewing the Existing Scheduling Script Settings for details), choose the Rules tab in the bottom right frame.
2. Select a rule, sub-rule, or action and click the **Move Up** or **Move Down** button

   The CATI Supervisor module asks you to confirm the requested action by displaying a dialog box.

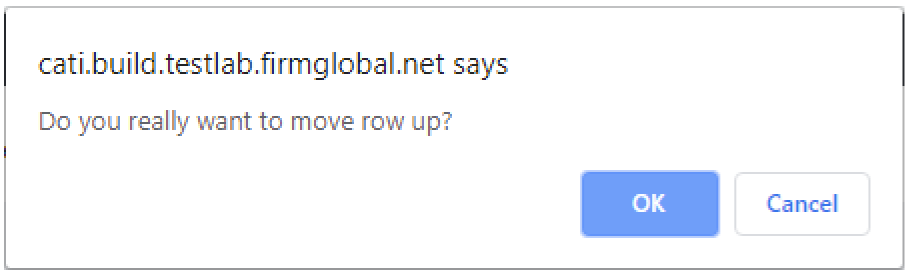


Figure 219 Confirmation dialog for Move operation

The above picture illustrates the prompt shown at the attempt to move the row up - the same prompt appears when you try to move the row down, only it asks about the different direction. Click OK to move an item in the chosen direction.

3. The bottom right frame refreshes, and items in the list are displayed in the changed order.
4. Repeat this operation to move an item several rows higher or lower.

5.6.8. Writing a Custom Scheduling Script Code

In case you wish 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 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 (see Specifying Scheduling Script Rules).

To create a custom scheduling script code manually:

1. With the scheduling script opened in the View mode (see Viewing the Existing Scheduling Script Settings for details), choose the Custom Script tab in the bottom frame.

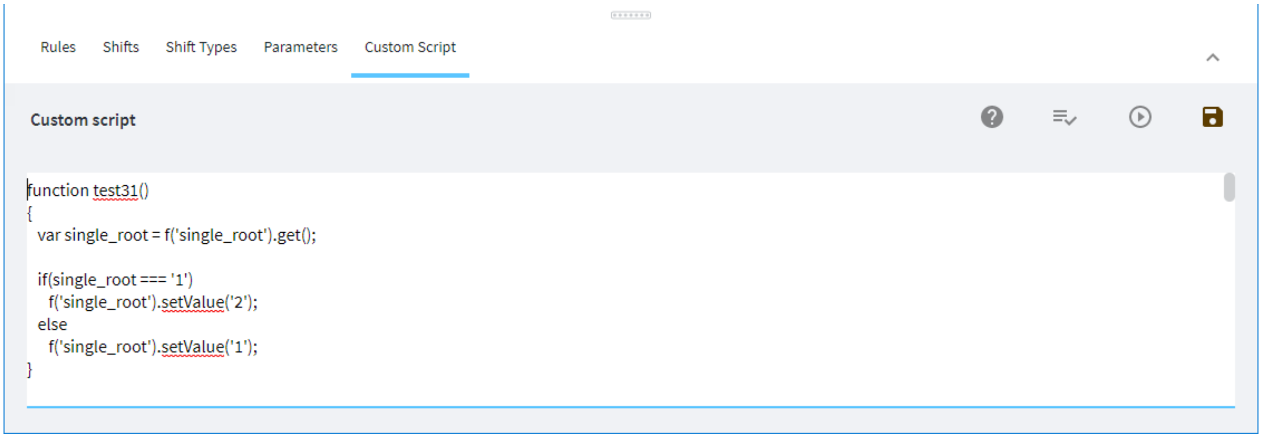


Figure 220 Adding a custom script

This tab contains a single text field, which you will use to enter a script code of your own.

2. Enter the script code (JavaScript.NET language is used) in the text field. You can also paste the clipboard contents into this field. Click the Check button in the bottom frame toolbar to check the code for correctness. Check results are displayed in a separate dialog window.

   It may be useful to periodically peek into the Scripting Reference which is opened in a separate window when the Scripting Reference button is pressed.

3. This tab's toolbar also hosts the Save and Launch button which saves and then launches the current scheduling script, and the Save button which only saves the scheduling script without launching it.

   Refer to (go to Accessing the Call Object in Custom Scripting on page 233 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 Confirmit 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 in the Confirmit terms).

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.

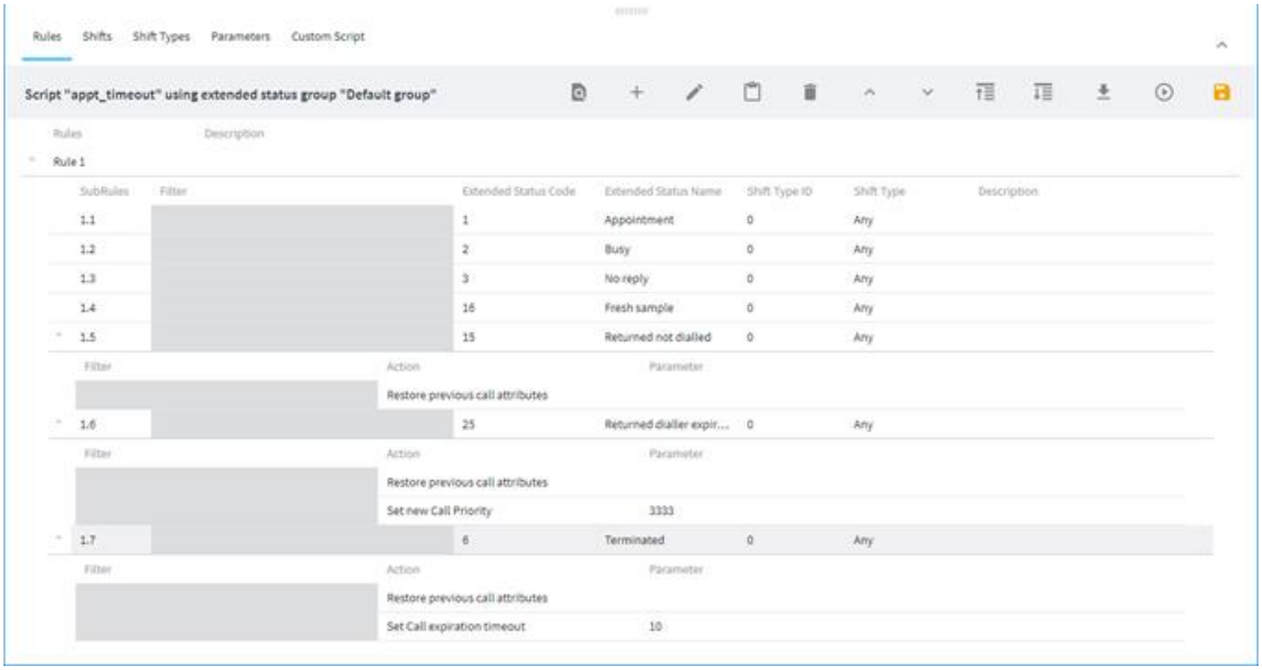


Figure 221 An example of scheduling script containing the "Restore previous call attributes" action

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.

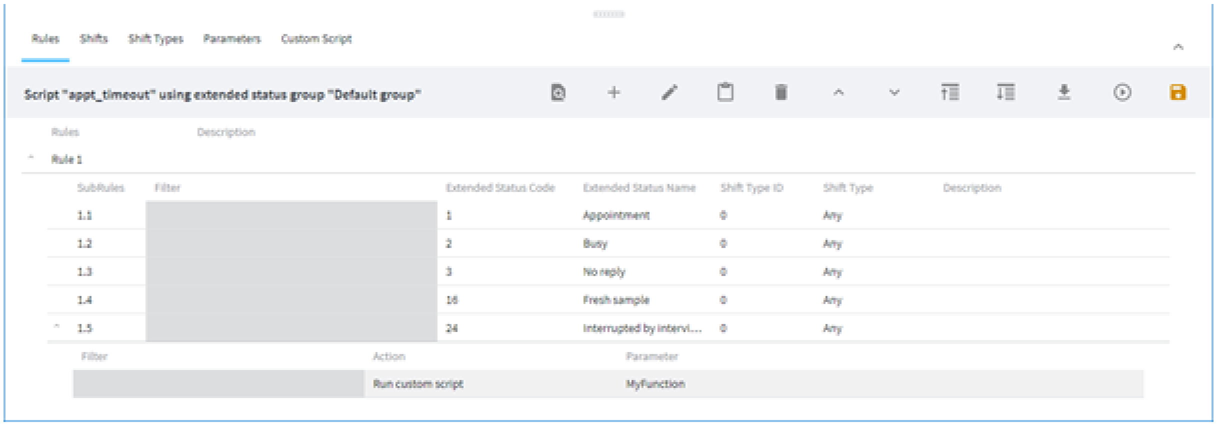


Figure 222 An example of the scheduling script containing a reference to the custom script

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 the 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.

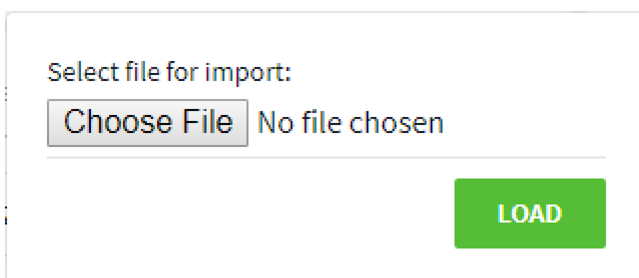


Figure 223 Selecting an XML description of a scheduling script for import

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 the XML format.

This provides for the possibility of transferring scheduling script descriptions between different system installations and teams, facilitating the collaboration.

To export the selected scheduling script(s) description(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 scripts keeping the Ctrl or Shift keys 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 Export button in the top right frame toolbar. This will display the standard browser dialog box prompting you to choose what to do with the saved XML data.

   Click the Save button. This will display the standard Windows Save As dialog box. 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 application which is used by your system by default to view files in XML format.

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.

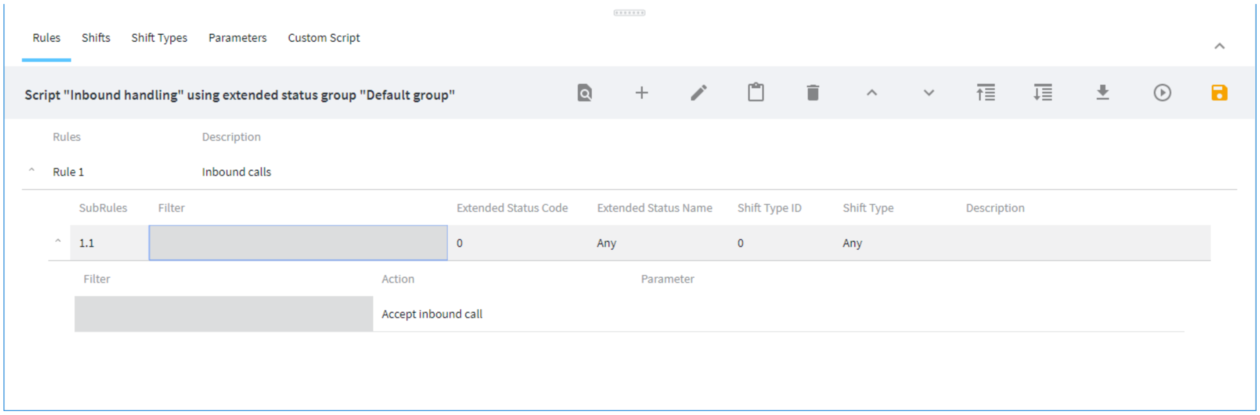


Figure 224 Example of a scheduling script for handling inbound calls

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 Settings Related to Inbound Calls on page 376 for more information) - to learn about DDI number configuration;
- (go to General Procedure for Handling an Inbound Call on page 379 for more information) - for general information regarding support of inbound calls
- (go to On-hold Messages Played to Calling Respondents on page 381 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.

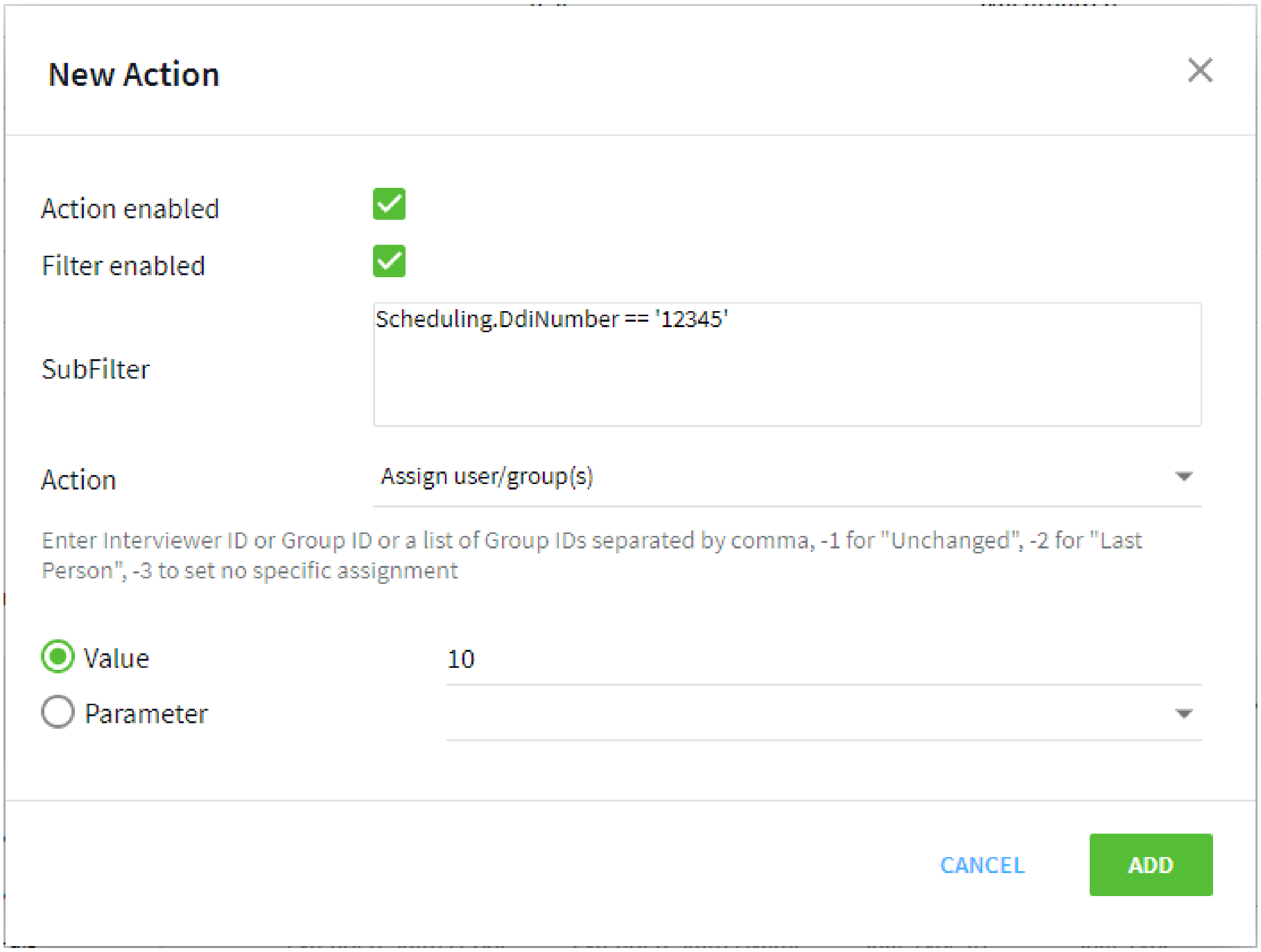


Figure 225 A scheduling rule action routing respondents based on a DDI number

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.

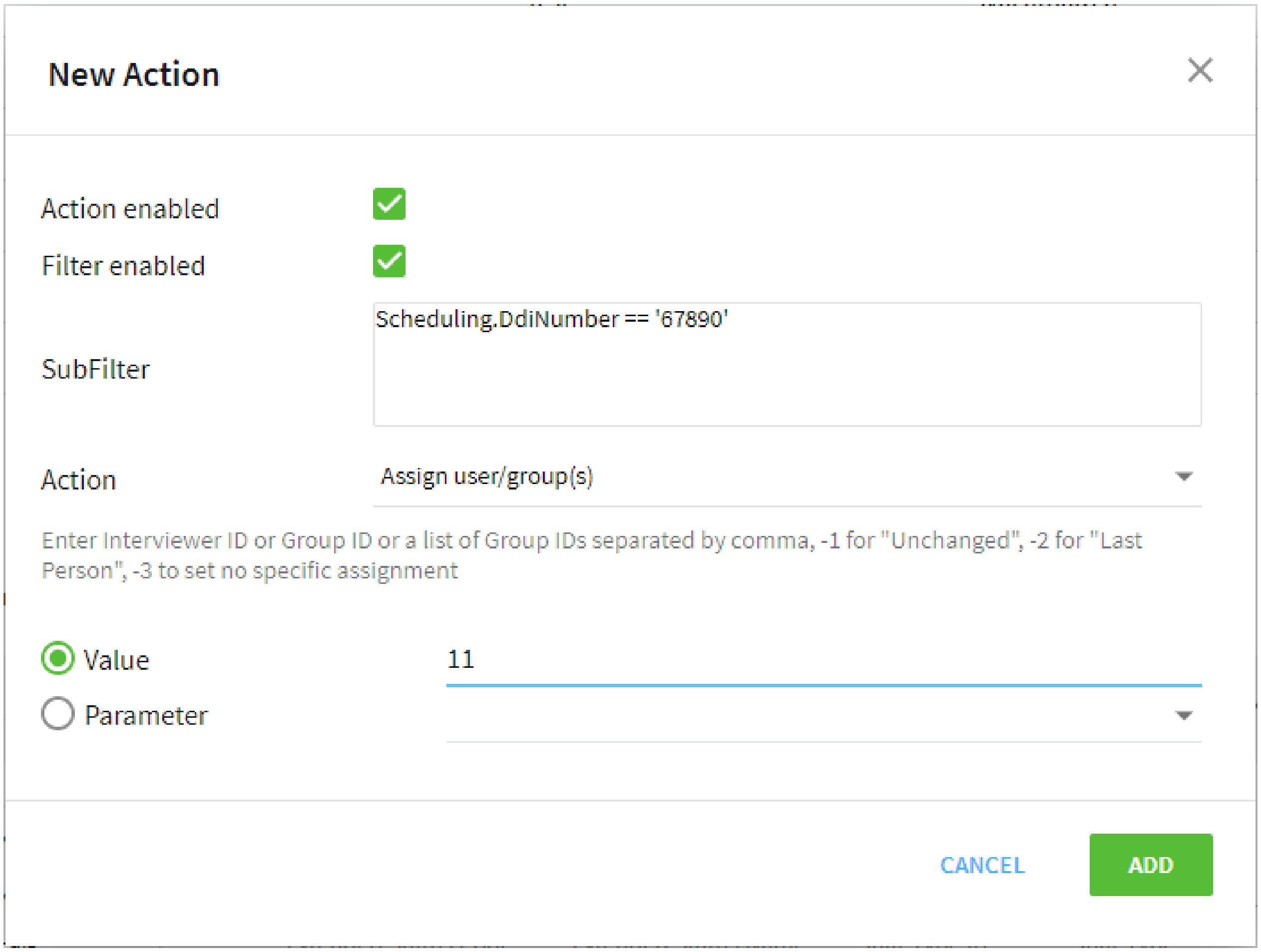


Figure 226 Another scheduling rule action routing respondents based on a DDI number

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.

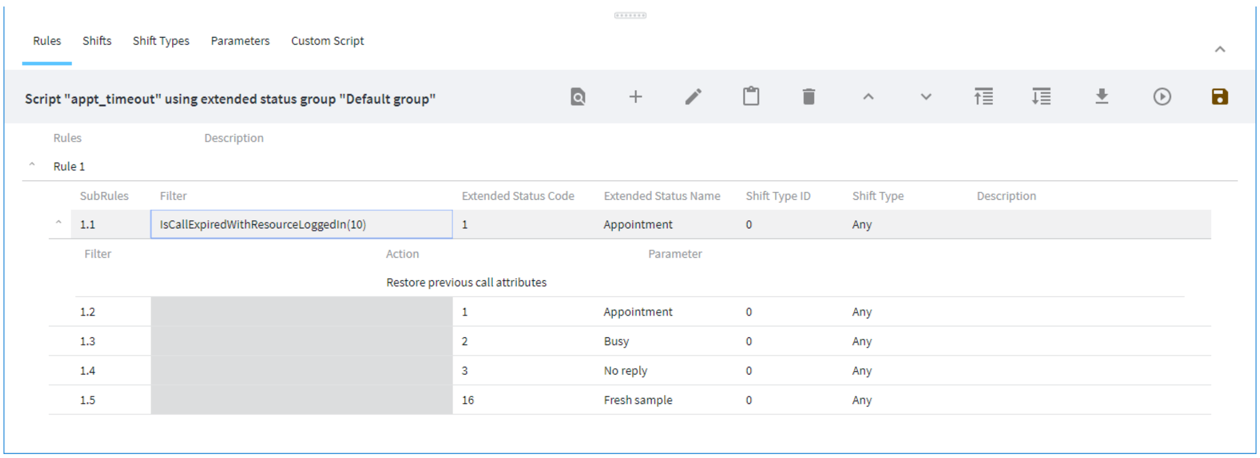


Figure 227 Scheduling script containing a sub-rule for setting appointment timeout

6. Interviewing

Interviewer's work is arranged and monitored by the supervisor. Supervisor specifies time intervals (shifts) when the interviews should be performed, assigns interviewers and interviewer groups to surveys and interviews, defines the task choice mode for them, and monitors their work. Supervisor is also entitled to terminate any interview, and shutdown the whole survey, if required.

An interviewer works with the separate program module which is called CATI Interviewer Console. The present section describes technique of working with the CATI Interviewer Console.

The CATI Interviewer Console software module installation kit is downloaded from the Confirmit server and CATI Interviewer Console is then installed on a computer from this kit. Installed application is available through the Confirmit group found in Windows Programs menu. Click the CATI Interviewer Console item to start the application.

Do not forget that interviewers who should log in to work with CATI Console must be added to the CATI Supervisor module prior they begin their work. Otherwise they would not be able to provide credentials required for logging in.

CATI Console allows selecting a survey/interview to work with if such is assumed by the task choice mode, or it simply takes an interviewer to the designated interview (in a fully automatic mode).

Telephone interviewing assumes dialing telephone numbers provided in the sample. The dialing routine can either be performed manually (on the side of interviewer), or it can be delegated to a company specializing in providing dialing services. Provider of the dialing services arranges a special dedicated hardware/software complex that carries out all tasks regarding establishing telephone connections that are required to conduct interviews defined by the survey parameters.

The clear and comprehensible console interface makes it easy for the interviewer to interact with the respondent. Prompts are displayed on each interview step, the interviewer can choose between entering answer variants in the text field and selecting predefined options.

On any step, the interviewer has an ability of going back to any of the preceding questions and modifying the answer, if required.

Besides the interviewer can make an appointment for a later call should the respondent ask for a delay.

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 window, 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.

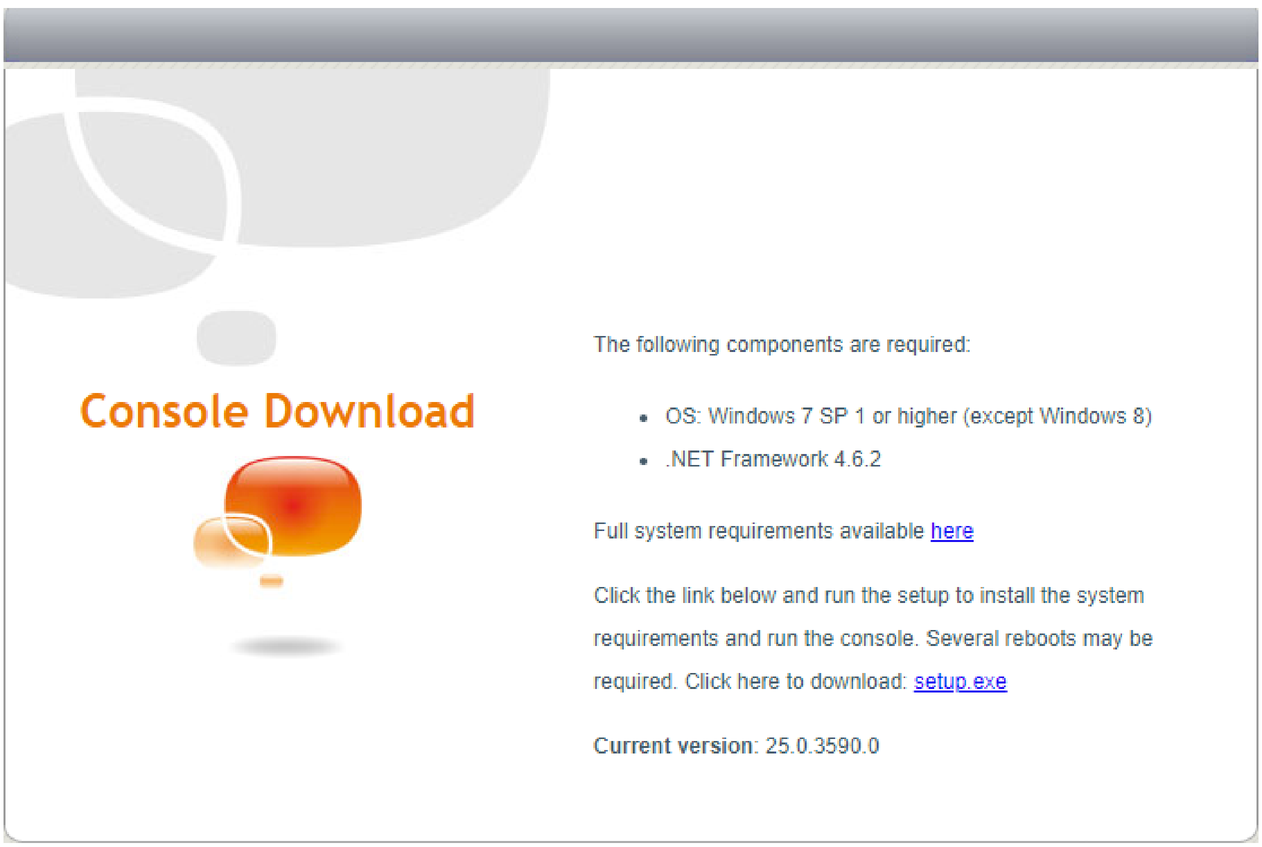


Figure 229 CATI Console download page

4. Click the link and follow the instructions to download the file.

   In case prerequisites mentioned in the dialog window 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 Confirmit software which can be found on the Confirmit 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 Confirmit 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 249 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 245 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 window.

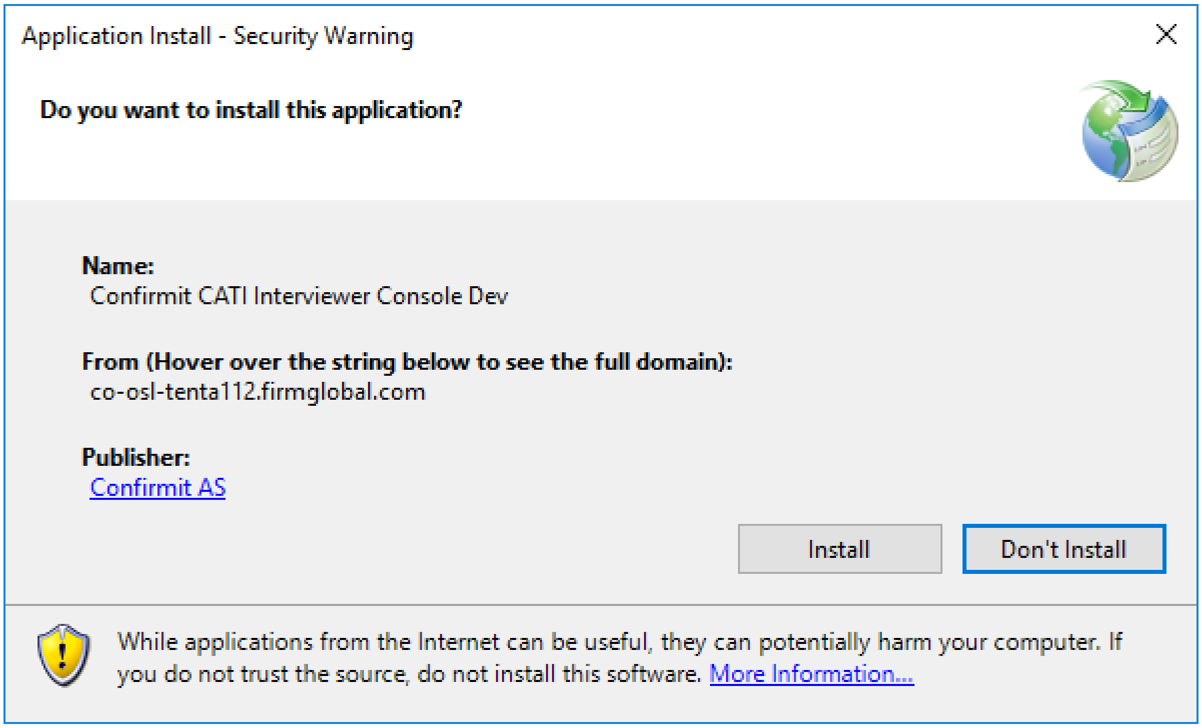


Figure 230 CATI Console security warning produced at the time of installation

To proceed with the installation choose the Install button.

3. The dialog window with the progress bar showing the installation progress is displayed after the software installation starts.

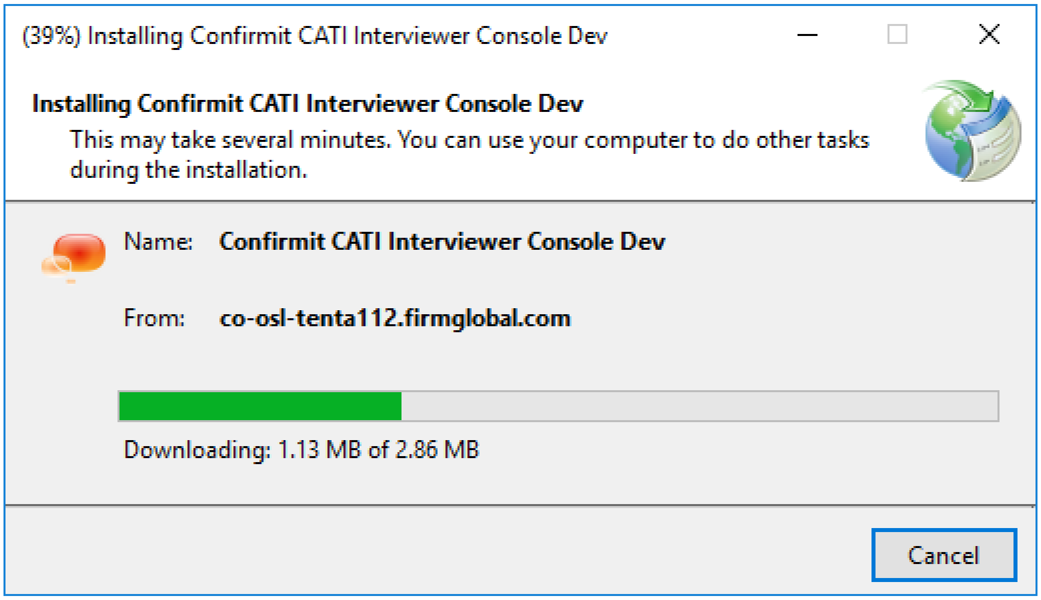


Figure 231 CATI Console installation progress

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 **Confirmit 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

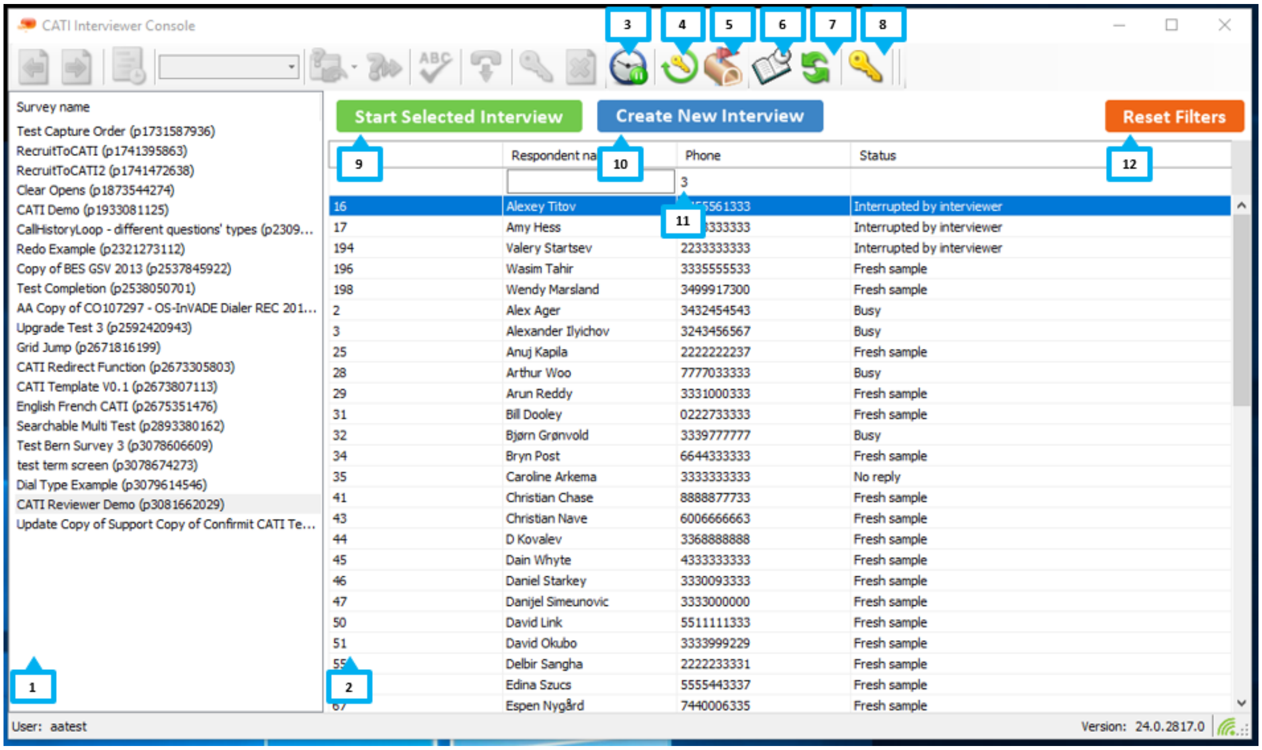


Figure 232 Survey/Interview selection screen

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

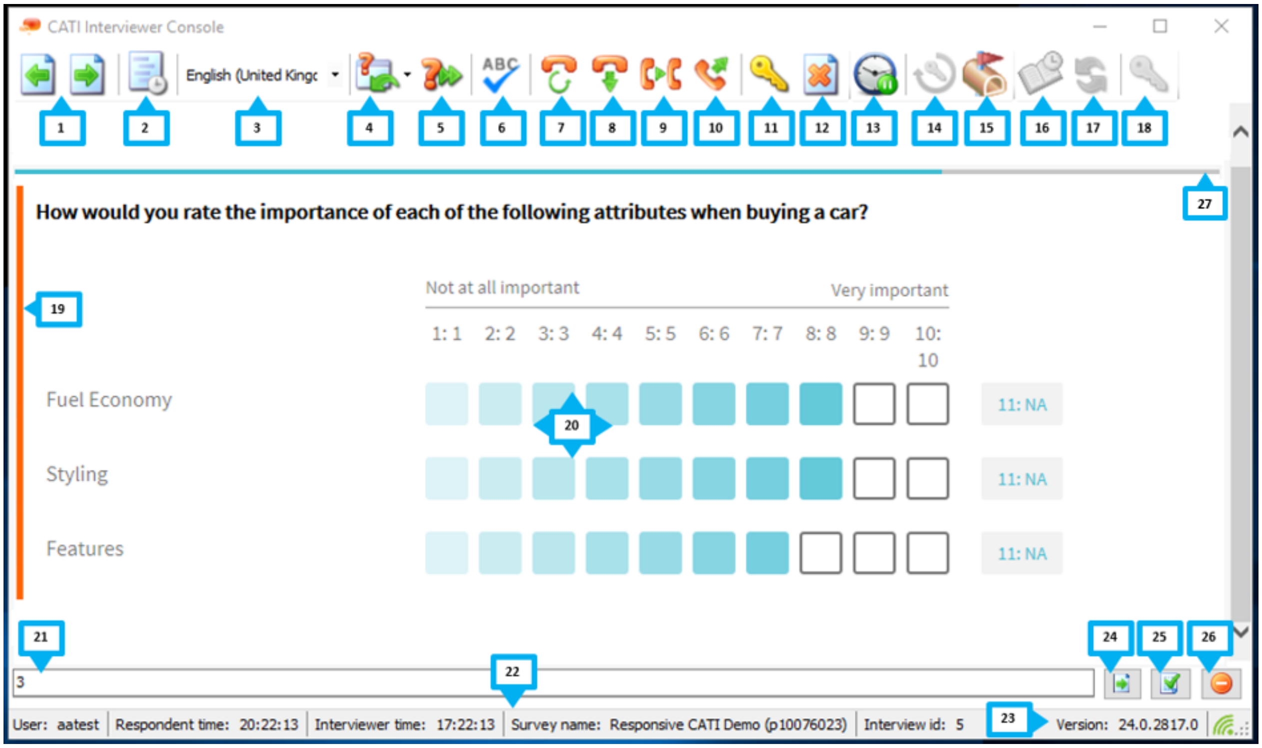


Figure 233 Interview page

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

The interviewer has to start the CATI Interviewer Console application by choosing Confirmit CATI Interviewer Console in Confirmit group in the Windows Programs menu.

When the CATI Interviewer Console is started, it displays the Station ID dialog box first.

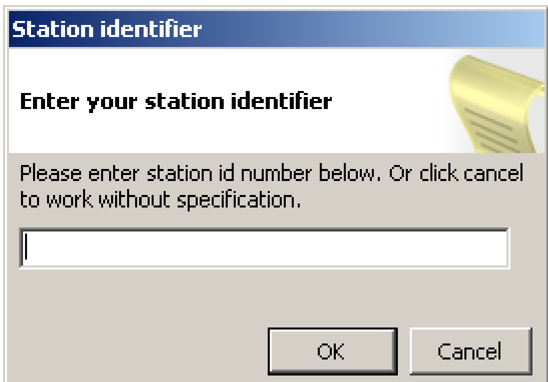


Figure 234 Entering the Station Identifier

This dialog box is used for entering the unique ID assigned to this particular interviewer. The following ID format is used: <Name><Number><Type>, where:

- 'Name' is a part that contains information about the interviewer's station. It can contain only characters and is limited by 8 symbols;
- The 'Number' part can contain only digits and is limited by 6 symbols. 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 the second). If a dialer is not used this part can be omitted;
- The 'Type' part defines the dialer type. It can consist of 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. At the time the interviewer logs in to work with the CATI Interviewer Console for the very 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. All the consequent login procedures for this interviewer does not require entering the Station ID - it will be stored by the system, and each time this interviewer will start the CATI Console, the Station ID dialog will be displayed with that field displaying the initial station ID inaccessible for editing.

If the situation requires changing any part of the Station ID (or changing it completely), you should press the Alt+S key combination on the keyboard when the Station ID dialog appears at login time. This will display the same Station ID dialog, but with the Station ID field open for editing.

In case this is allowed by the administrator (no Station ID is assigned to that interviewer) the Station ID field may be left blank, and the interviewer 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.

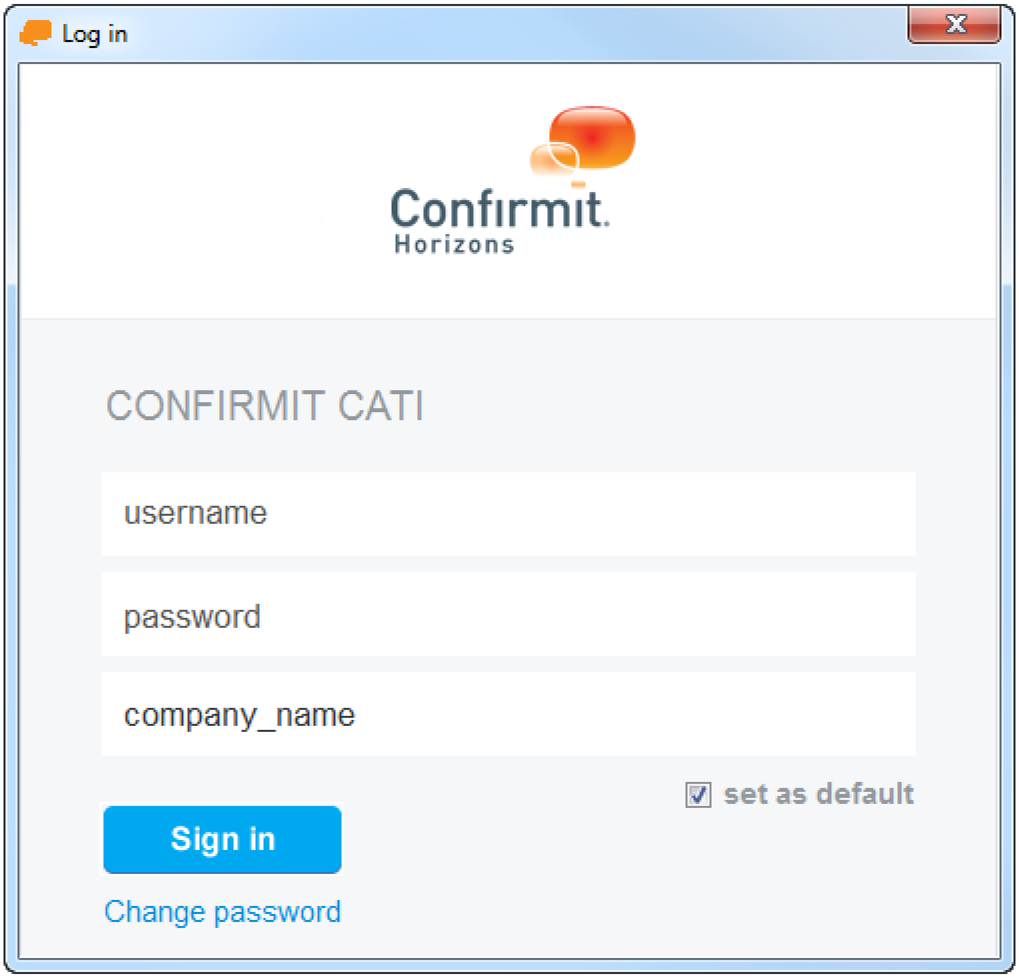


Figure 235 The CATI Console - Log in dialog

The interviewer should enter his credentials into the Username and Password fields in this dialog window. Then he/she should specify the name of the company he/she is a member of (in the Company Name field). Optionally the interviewer can decide whether this company name would be used as default each time he/she starts the CATI Console - this is done by checking the Set as default box.

After all credentials are supplied the interviewer should click the Log In button.

A situation may arise when a password has already expired by the time the interviewer tries to log in. In such case the Interviewer console displays the following message prompting the interviewer to change the password.

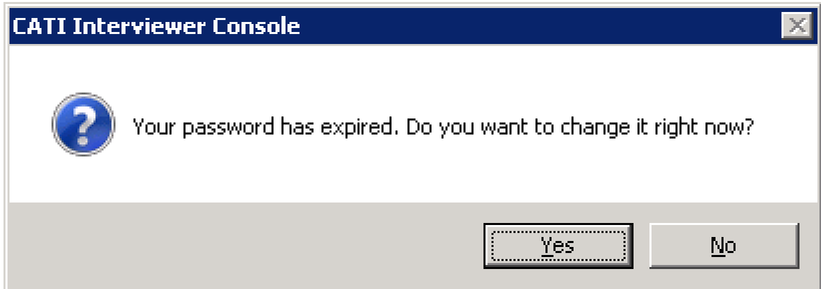


Figure 236 Interviewer password expiration warning

The interviewer may refuse to change the password by pressing No in this dialog. This action will close the warning message and display the regular Log in dialog again.

If the interviewer accepts the prompt for changing the password and presses Yes in the warning dialog, the Password changing dialog is displayed (see the picture below).

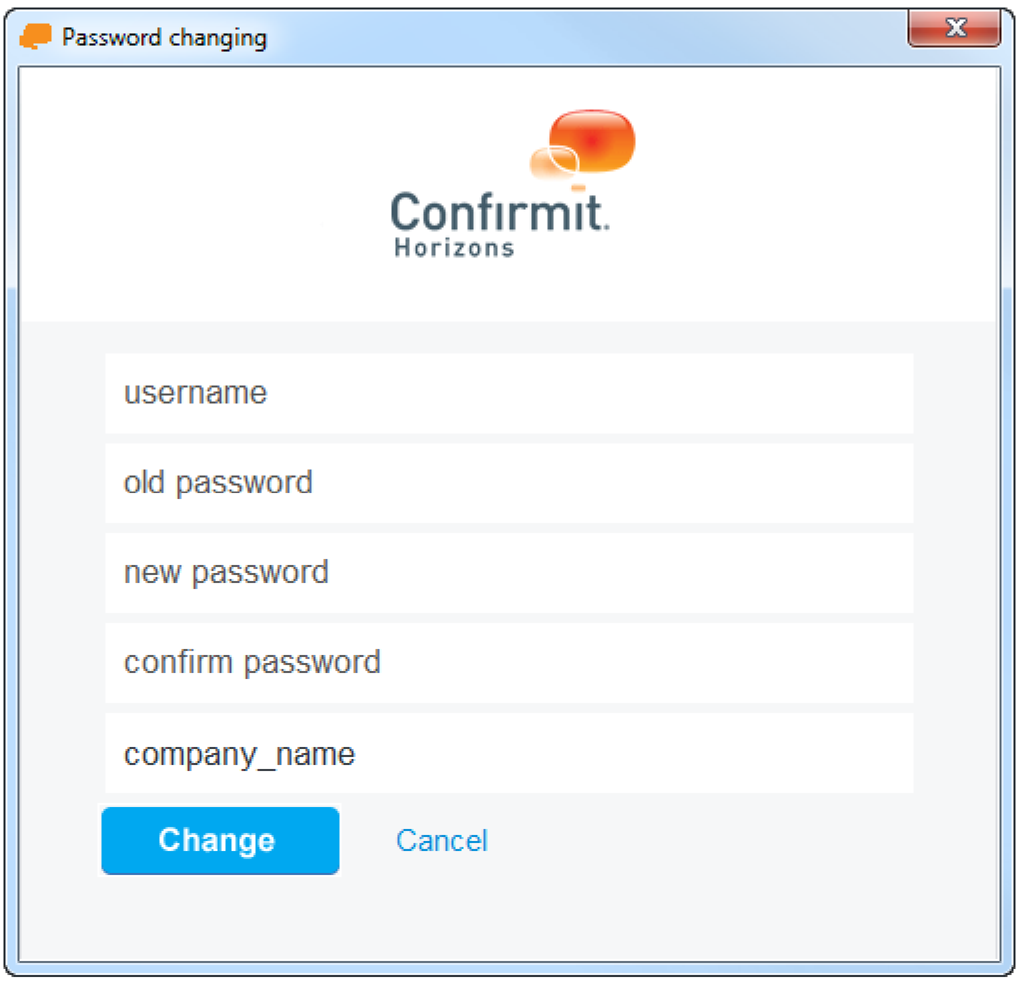


Figure 237 Password changing dialog

The user has to supply his current credentials and then consequently enter the new password in the New password and Confirm password fields. The company name should be changed accordingly (if required). Upon pressing Change in Password changing dialog the system validates all fields and if any field contents is considered incorrect, it displays corresponding error message. The Password changing dialog is not closed when an error message is displayed, the interviewer has to close the error message and edit the required field contents to continue. If upon pressing the Change button all field contents are found valid, the system accepts the change, the Password changing dialog closes, and the regular Log in dialog is displayed then. The interviewer has to enter the newly supplied credentials to log in.

In case the user chooses Cancel in the Password changing dialog for some reason, this dialog closes and the Log in dialog is displayed.

The interviewer can initiate password changing at his own will at any moment by choosing the Change password option in the regular Log in dialog. This will display the Password changing dialog which is similar to the one described above. Same rules are applied in that case.

In case the interviewer has closed the CATI Console window while the interview was in progress, he is not logged out after that, and, after he/she starts the console again and successfully logs in, their work in the CATI Interviewer Console will automatically begin from the last unanswered question (regardless of the assigned task choice mode). But if the supervisor has intentionally terminated the interview (using the appropriate control in the Interviewer List window) after the CATI Console was shut down that way, the interviewer will be able to work normally in the assigned task choice mode after that.

The login procedure validates the current time on the interviewer PC launching the console. If the time is incorrect (or it 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 the interviewer should contact the supervisor or adjust the system clock on his computer by connecting to any Internet Time Service server and performing synchronization procedure provided by that server. After the system clock is adjusted the interviewer should repeat the login procedure.

If an interviewer is already logged in on one Interviewer Console and then attempts to log in from another console he/she will receive the following message.

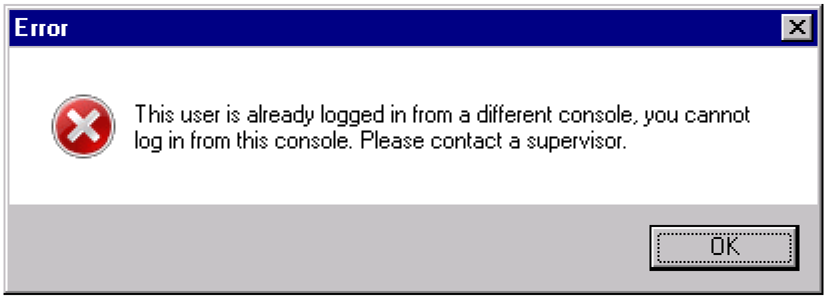


Figure 239 Warning message displayed when the interviewer performs multiple login

The interviewer will not receive any message and will be permitted to log in if the second console has the same Station ID or if the Station IDs are both blank.

Next the interviewer should choose whether he/she would use the dialing system (the "Dialer" in Confirmit terms - refer to Dialer for information on what the Dialer is and how it is used with the CATI Supervisor module), or whether he/she would perform dialing manually. The Dialer is usually used to deliver the connected calls to the interviewer automatically based on the specified set of rules.

On the next step the CATI Interviewer Console will prompt the interviewer to use the dialer. This step is used only in case the company that interviewer belongs to uses a dialer. The Dialer log in dialog box does not appear if the company works without dialer (and this step is omitted then).

The only field in this dialog box is inaccessible for editing and contains the same station ID that was entered by the interviewer at the very start of the login procedure (see the Station ID dialog box description above).

The Dialer log in dialog box allows for three different work options which are represented by the buttons. Pressing OK will initiate connection with the dialer (this dialer is identified using the supplied station ID) and start the CATI Interviewer Console with the dialer support. Pressing Cancel will start the console without the dialer support. Pressing the Log out button will log the interviewer out.

The picture 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 (this is assumed based on the example ranges described above).

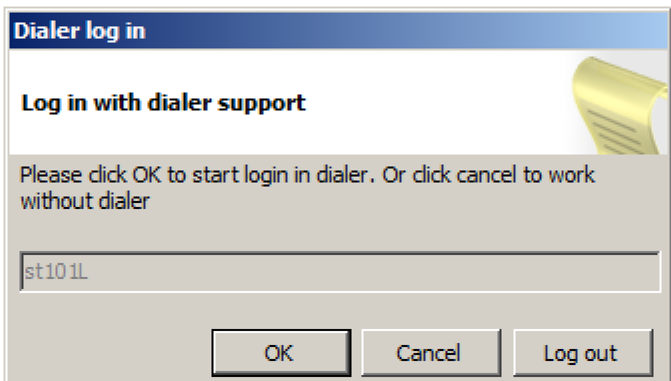


Figure 240 Logging in with or without dialer support

When the CATI Console application identifies the interviewer it displays the dialog box asking to supply the telephone number which will be used by the Dialer to deliver connected calls to (see the picture below). This must be the number of the telephone which this particular interviewer will use to conduct interviews.

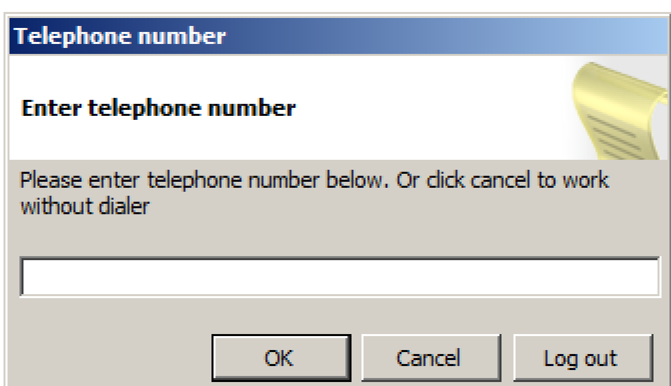


Figure 241 Entering the telephone number for work with the Dialer

Note that all 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.

Pressing OK will start the interviewing session and will also commence communication with the dialer.

Alternatively the interviewer can click Cancel in this dialog window to perform all the dialing manually, without using the dialer.

Pressing the Log out button will log the interviewer out.

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 task choice 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.

In case the interviewer chooses not to use the dialer, he/she performs dialing himself. In fact the order of the numbers to be dialed is determined by the current task choice mode, but the dialing job itself is performed by the interviewer, and the dialing results are not processed automatically - the interviewer starts and stops dialing himself.

After the successful login the CATI Console may display different interface depending on the task choice 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 task choice 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 task choice 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 task choice 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.

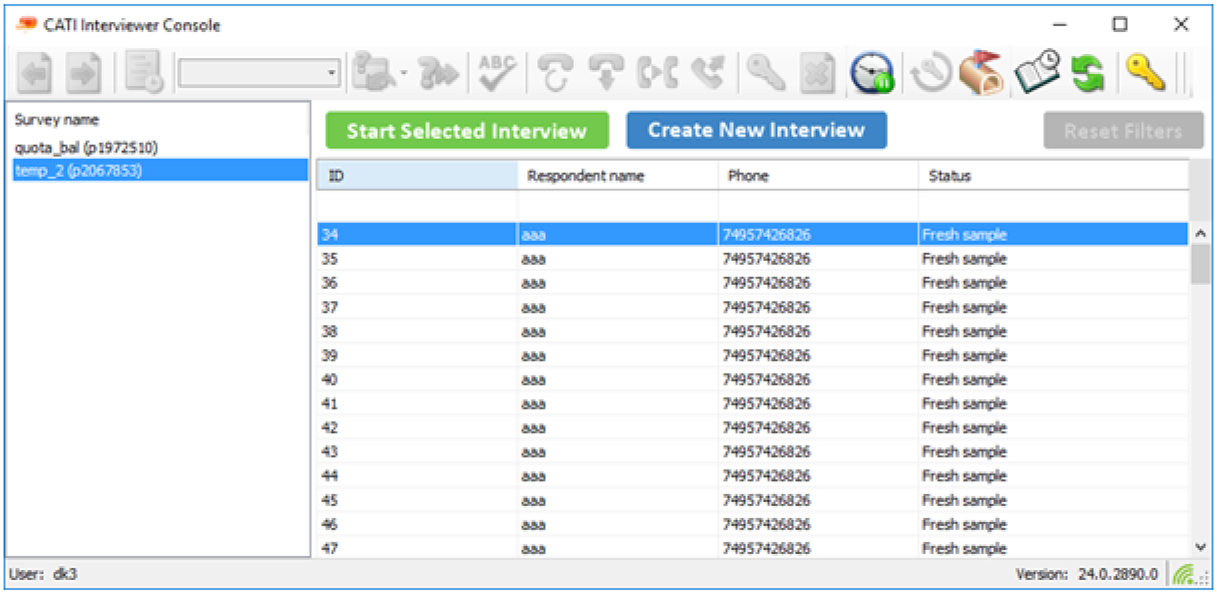
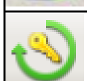
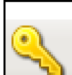
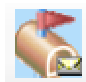


Figure 242 The CATI Console - Survey/Interview selection area

Note that an Interview list displays only a set amount 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 284 for more information) for details.
	CHANGE LOGIN TYPE	The toggle button. When enabled it allows changing the task choice mode after the current interview is finished. Available only when the Dialer is not in use. See (go to Choice Mode on page 269 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 261 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 task choice 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).

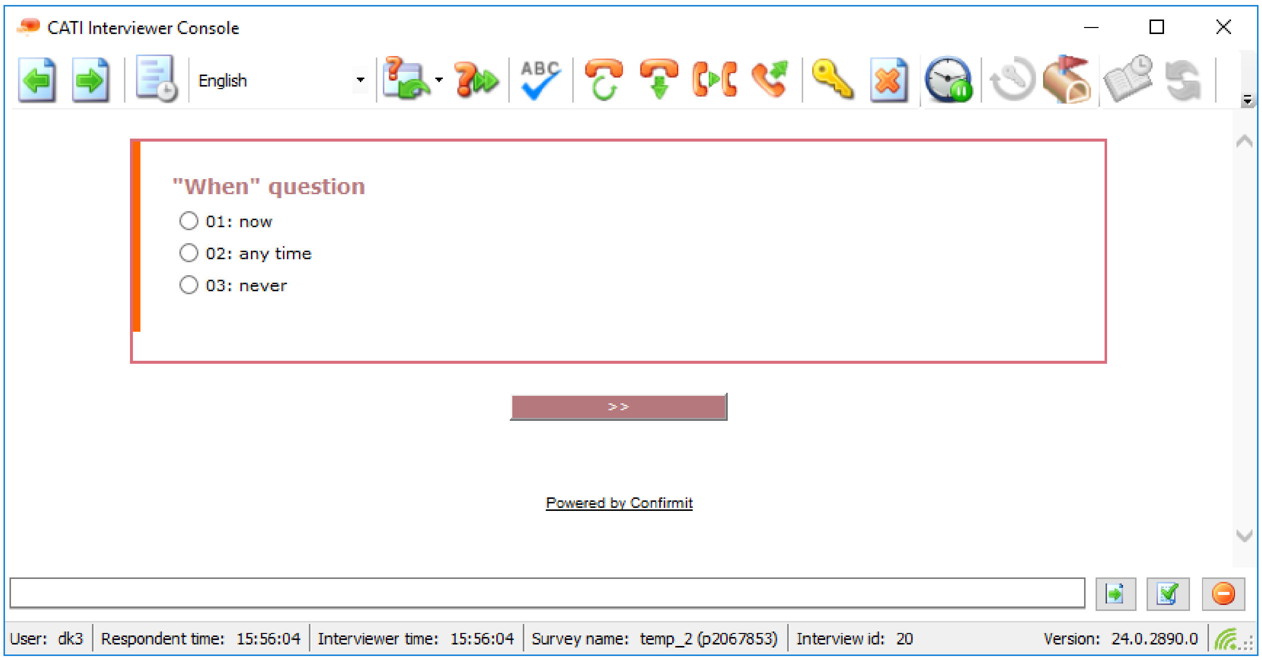
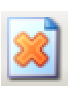


Figure 243 Interview question displayed in the work area

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 window.
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 300 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 289 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 294 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 280 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.

	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 A NEW RECORD AND START A NEW INTERVIEW	Only available when a corresponding option is enabled in the Confirmit Authoring module. Starts an interview when there is no corresponding record in the sample and creates a new record in the sample.
	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 with the help of the Confirmit Authoring module). A couple of buttons (Back and Forward) usually positioned below the answer variants allow moving 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 280 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

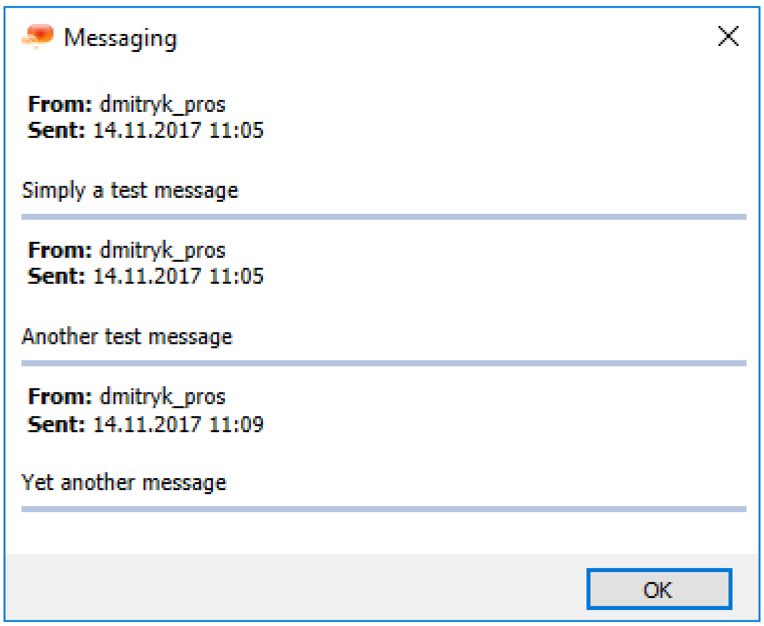
An interviewer can receive messages from the supervisor in two situations:

- 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 window.



3. The Messaging dialog window 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.

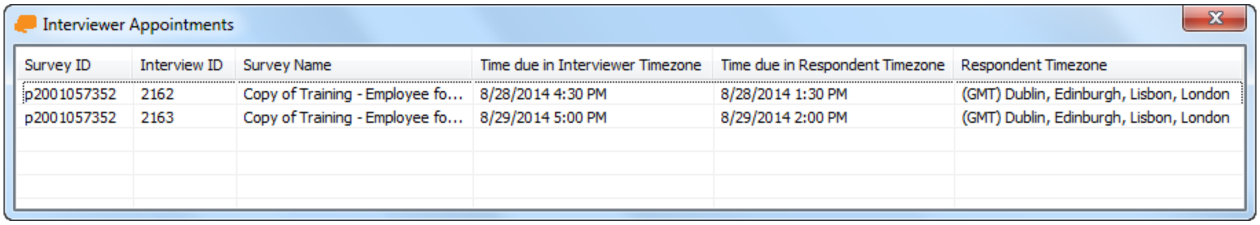
The Interviewer Appointments window shows surveys with interviews for which appointments exist. It also indicates the time on which the appointment is due (or was, in case it is currently overdue).

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 task choice mode click the Show My Appointments button  on the toolbar.

   This will display the Interviewer Appointments window.



Interviewer Appointments

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 task choice modes specified for him by the supervisor. The task choice 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 task choice mode descriptions below).

So, the way in which interviews are selected by the interviewer is determined by the task choice mode specified for this interviewer by the supervisor, and the way in which interviews are delivered to the interviewer within this task choice 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 task choice mode that was specified for the current interviewer by the supervisor. This task choice mode defines the way in which interviews are selected by an interviewer. The following task choice 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 task choice mode the interviewer will start working in. The list of task choice 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 task choice 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 task choice 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.

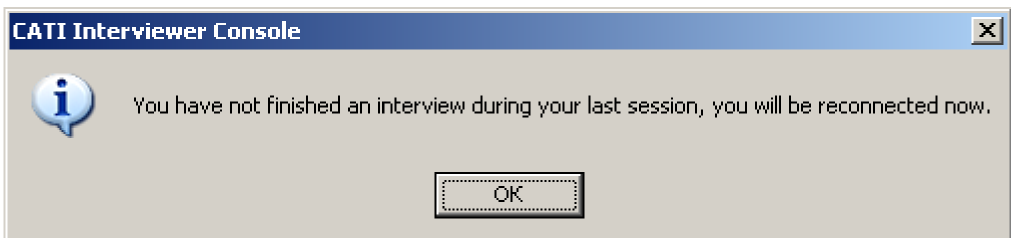


Figure 245 Warning message displayed upon logging in after abnormal application termination

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. He/she cannot alter this order in any way, and all he/she has to do is move through questions.

If there are interviews assigned to the current interviewer working in the Automatic mode, the interview is started and the first interview question is displayed on the screen immediately after he logs in.

In case there are no interviews assigned, the CATI Interviewer Console displays the following message in the blank work area: “No calls. Please wait.” The system then waits for one minute for new interviews to be assigned and, if no interviews are found, it displays the following dialog box.

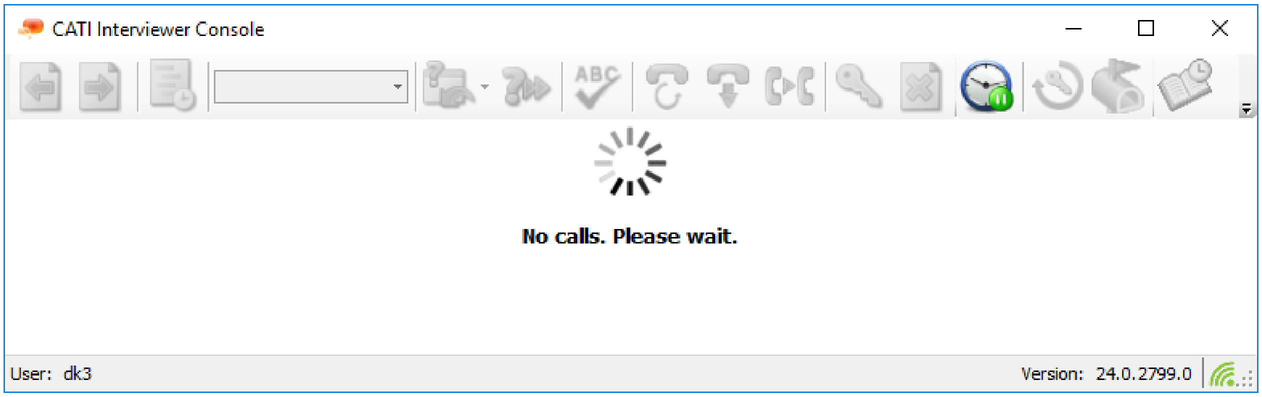


Figure 246 Message displayed upon logging in when no interviews are available

The system then waits for one minute for new interviews to be assigned and, if no interviews are found, it displays the following dialog box.

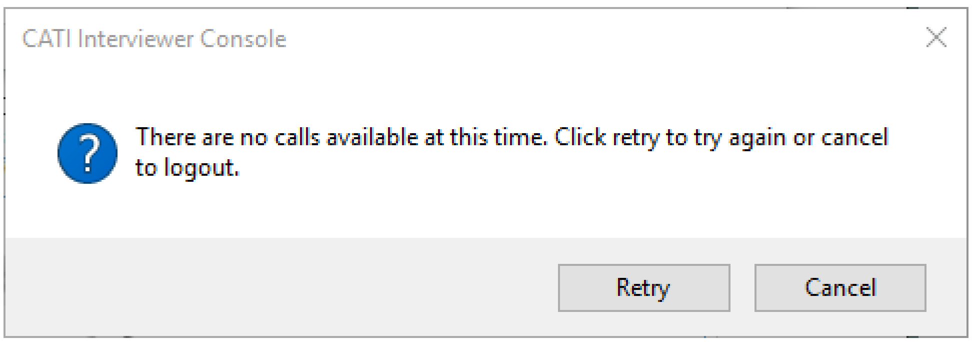


Figure 247 Dialog box displayed upon expiration of a one-minute waiting interval

If you choose Retry, the system waits for one minute more for new interviews to be assigned, and if no interviews are found, it displays the same dialog box again.

If you choose Cancel, the system logs you out.

6.7.2. Survey Selection Mode

In this mode one or a number of surveys are assigned to the interviewer, and he/she can choose one to work with.

So when the CATI Console starts in the Survey Selection mode the interviewer is presented with the list of all assigned surveys displayed in the work area.

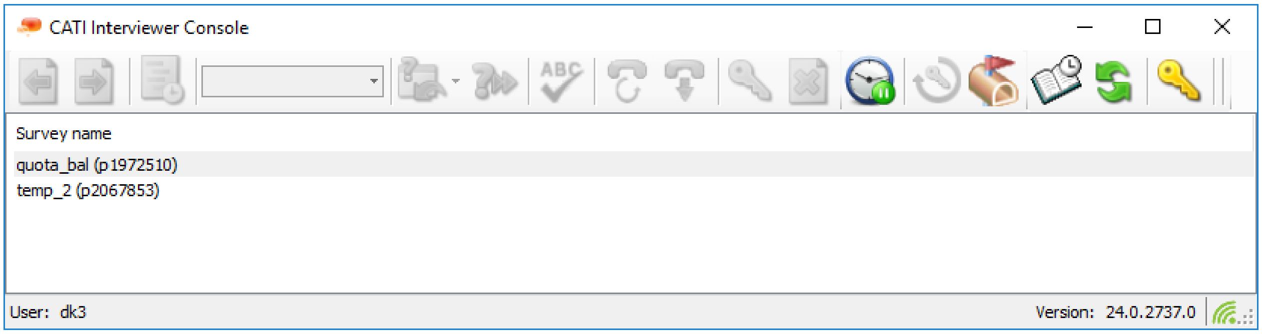


Figure 248 The CATI Interviewer Console started in the Survey Selection mode

The interviewer selects a survey by double-clicking its name in the list, and the CATI Interviewer Console starts the first interview from that survey assigned to that interviewer. Since that moment the CATI Interviewer Console operates in the Automatic mode – see Automatic Mode for details. When the first interview is finished, the CATI Interviewer Console starts the next one and so on, until all interviews from this survey assigned to the interviewer are finished.

Important!
Regardless of the number of surveys assigned to the interviewer he/she can work only with a single survey during a session. In case all interviews from the selected survey assigned to the interviewer are finished, he/she will have to log out and then log in once again (and start another session) to work with another survey.

Note: If a single survey is assigned to the interviewer working in the Survey Selection mode, the CATI Interviewer Console starts operating in the Automatic task choice mode from the very beginning as there will be no choice of surveys (the interviewer cannot choose another survey in that case).

In case there are no surveys assigned to the current interviewer after he has logged in, the CATI Console displays the following message.

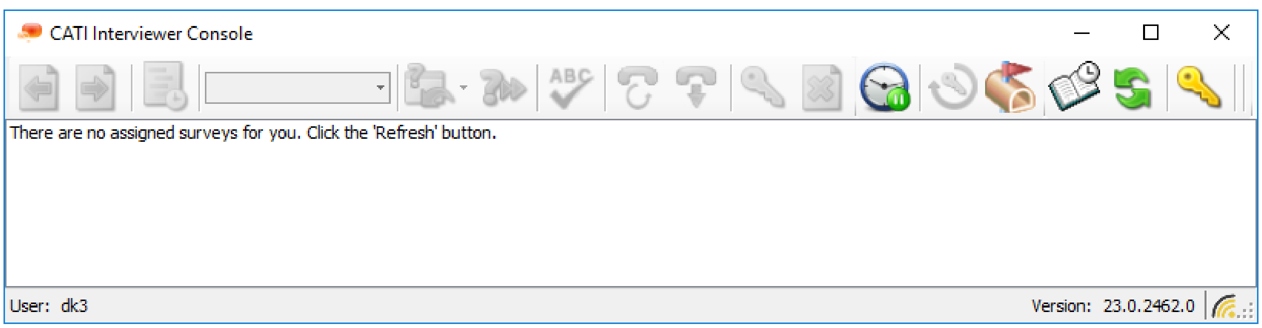


Figure 249 Warning message displayed upon logging in when no surveys are available in Survey Selection mode

At this point the interviewer can either log out of the CATI Console by pressing the Log out button  on the toolbar (see Logging Out and Closing the CATI Console Window for information on log out options), or click the Refresh button to force the interviewer console to search for the assigned survey again. In case the Refresh button was pressed, and no assigned survey is found for the current interviewer, it displays the same message again. The interviewer can repeat the procedure until the 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 the list of all assigned surveys displayed in the left pane in the work area. Select a survey by double-clicking its name in the list in the left pane, and the right pane is populated with the list of interviews available for this survey.

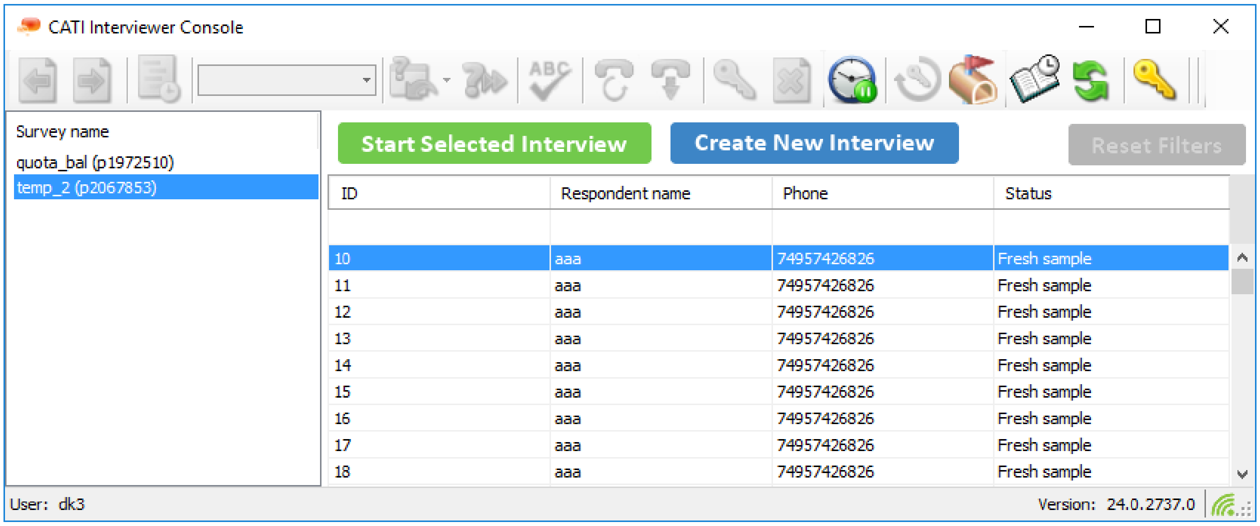


Figure 250 The CATI Interviewer Console - a survey is selected in the Manual Selection mode

Each interview is displayed in the list as a single row. Interview details are shown in columns. First four columns are fixed - these parameters are always displayed in the interview list by default. Additional set of interview questions can be added as columns here. It is determined by settings which are configured by a supervisor in the Confirmit Authoring module (refer to the appropriate sections in the CATI Administrator manual and in the Confirmit Authoring manual for instructions) and on the Interviewer Search tab of the Survey information view (refer to Adding Searchable Questions to the Interview).

Note that in case the survey selected in the left pane contains no interviews (no records left in the sample or there are no interviews assigned to the interviewer), the right pane remains empty: a completely new interview can only be created in this case.

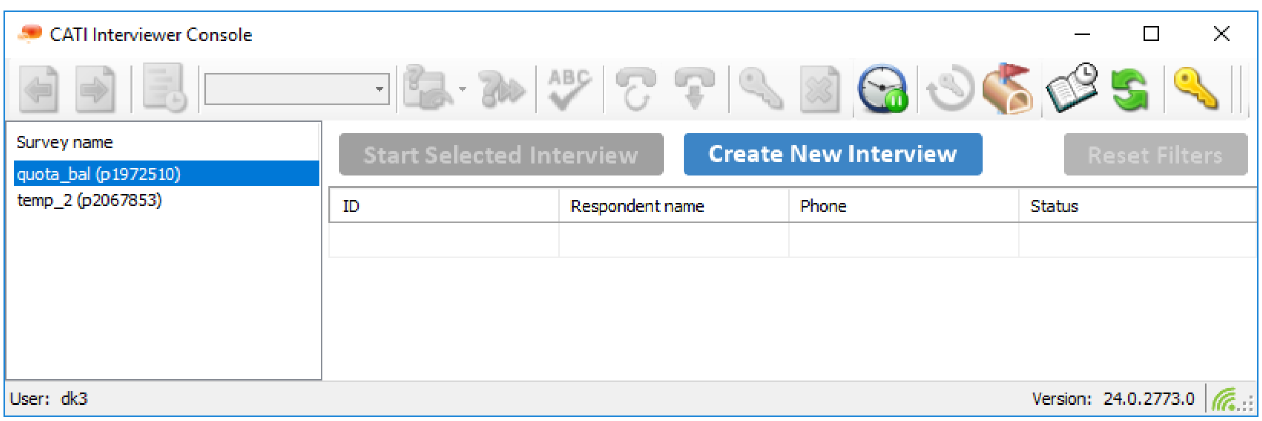
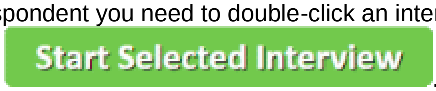


Figure 251 The CATI Interviewer Console - the selected survey has no interviews

Two action buttons are displayed above the right pane. These buttons are available only when interviewer works in the Manual Selection mode. Both buttons start an interview. The **Start Selected Interview** button starts an interview which is selected in the right pane. This button is grayed out and stays inactive if the list in the right pane contains no interviews. 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 under the CATI Options tab in the Survey Settings in the Confirmit Authoring module.

To start interviewing a respondent you need to double-click an interview in the list, or select it and click the Start Selected Interview button 

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There are situations when an interview should be started but the sample contains no corresponding record. This might be the case when an inbound call comes in from a respondent who was not included into the sample. Or you may need to carry out some testing and have no sample records handy. In such case you have to click the Create New Interview button 

. This action will start a new interview which is then stored in the database and can be viewed in the Call Management window. An interview started without corresponding sample record is conducted similar to a regular interview, but it is not added to the list of interviews in the CATI Console. Pay attention to the Interview ID which is displayed in the CATI Console bottom status bar when such interview is started - you can use this ID to find the interview in the Call Management window. Another parameter that helps to identify the "anonymous" interview is the "Time of Last Call" - note the date and time when the interview was started - this is the Time of Last Call.

In case there are no surveys at all assigned to the current interviewer, the CATI Interviewer Console displays the following message.

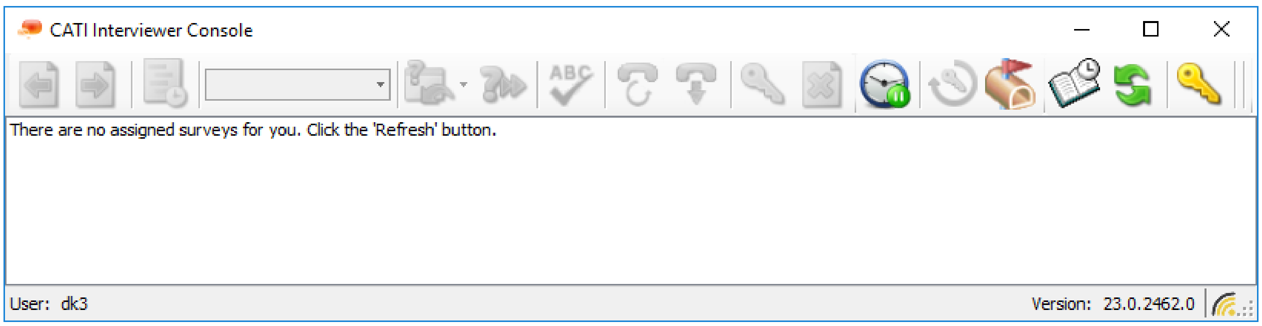


Figure 252 Warning message displayed upon logging in when no surveys are available in the Manual Selection mode

At this point the interviewer can either log out of the CATI Console by pressing the Log out button  on the toolbar (see Logging Out and Closing the CATI Console Window for information on logout options), or click the Refresh button to force the interviewer console to search for the assigned survey again. In case the Refresh button was pressed, and no assigned survey is found for the current interviewer, it displays the same message again. The interviewer can repeat the procedure until the assigned survey appears, or he/she can log out of the CATI Console.

The CATI Console provides a way to search for the particular interview by applying filters in the interview list in the right pane. Each column contains a blank cell below the header cell with the column name. This cell can be used to enter a symbol combination - a filter (see the picture below).

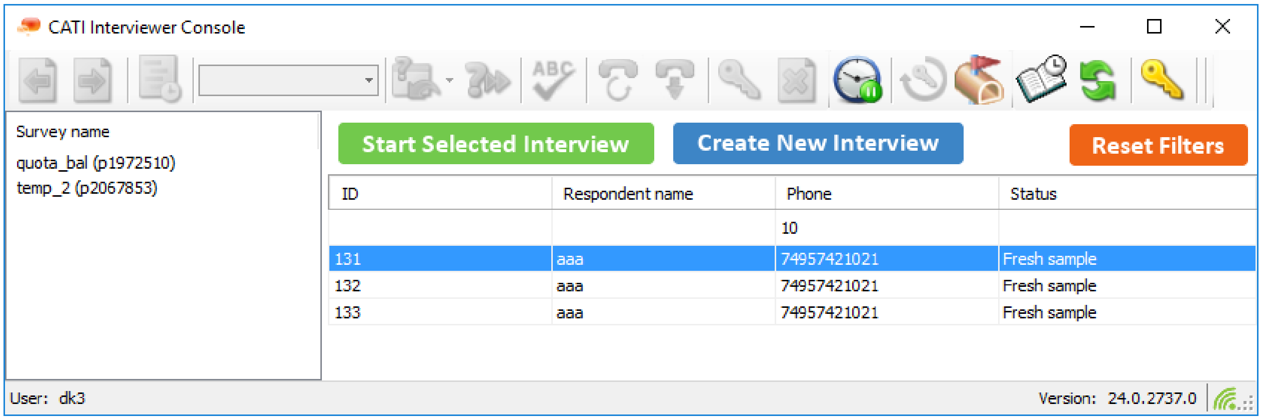


Figure 253 The CATI Console - searching for the interview by its parameters

To filter sample records by a particular parameter click inside a blank cell below corresponding column header and type a symbol combination there. Then press Enter on the keyboard - the CATI Console will display only interviews with that parameter matching the filter while hiding all other interviews.

You can apply filters to two or more parameters simultaneously.

To remove all applied filters at once click the Reset Filters button 

.

6.7.4. Choice Mode

This is a special task choice mode - when the CATI Interviewer Console is started in this mode the interviewer is allowed to select the task choice mode to work in.

Like all other task choice modes the Choice mode is appointed by the Supervisor. When the Supervisor assigns the Choice mode to the interviewer he specifies the list of task choice modes from which the interviewer will be able to select at the time he logs in to work with the CATI Interviewer Console.

When an interviewer who was assigned the Choice mode logs into the CATI Interviewer Console and selects a task choice mode from the list of available modes, he/she will continue working in this mode until they log out. At the next CATI Console start the interviewer should select the task choice mode again, and so on until the Supervisor changes the task choice mode for that interviewer from the Choice to another mode.

When the CATI Console starts in the Choice mode the interviewer is presented with the Login type dialog window.

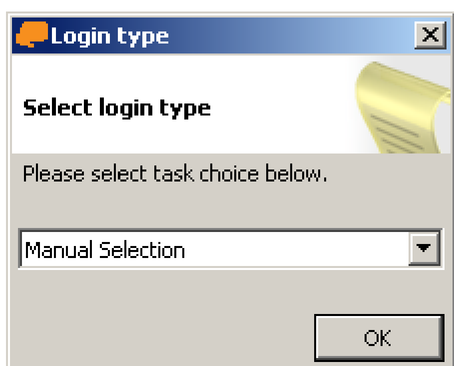
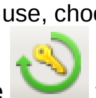


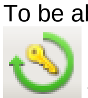
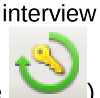
Figure 254 Selecting the task choice mode in the Choice mode

The interviewer should select the task choice mode he will work in during the current session. The task choice mode is selected from the drop-down list. Then he/she should click OK. The CATI Interviewer Console then starts in the selected mode.

Refer to Automatic Mode, Manual Selection Mode, and Survey Selection Mode for information on other task choice modes.

The procedure described above is applied when the interviewer works with the Dialer in use (see (go to Dialer on page 359 for more information)). In case the interviewer works without a dialer system, the procedure changes in the following way.

The interviewer who is assigned to work in the Choice mode, and starts his work in the CATI Interviewer Console with the Dialer NOT in use, chooses the task choice mode the way it is described above. When a dialer is not in use, the Change login type  toggle button on the Console toolbar becomes active, and the interviewer is then able to choose in which task choice mode he/she will continue to work when the current interview finishes. Note that this button is inaccessible when the dialer is in use (see (go to Dialer on page 359 for more information)).

To be able to choose the task choice mode for the next interview the interviewer should click the Change login type  toggle button while he/she still conducts the current interview. The button remains in the depressed state  until the current interview finishes. In such case, when the current interview finishes, the interviewer is presented the task choice mode selection dialog window again (see the dialog box picture above). After he/she chooses the task choice mode, the interview starts as usual, and the interviewer continues working in the chosen task choice mode until he opts to click the Change login type button again. Each time the Change login type toggle button is in the depressed state, the system is instructed to provide the interviewer with the selection of the assigned task choice modes when the current interview finishes. By toggling the button you can turn on (depressed button ), or off (button in the normal state ) this option - when the button is not depressed, the interviewer continues working in the chosen task choice mode as usual.

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 with the help of the Confirmit Authoring module (refer to the appropriate section of the Confirmit Authoring manual). Interview pages may contain questions along with all the answer variants, prompts for the interviewer etc.

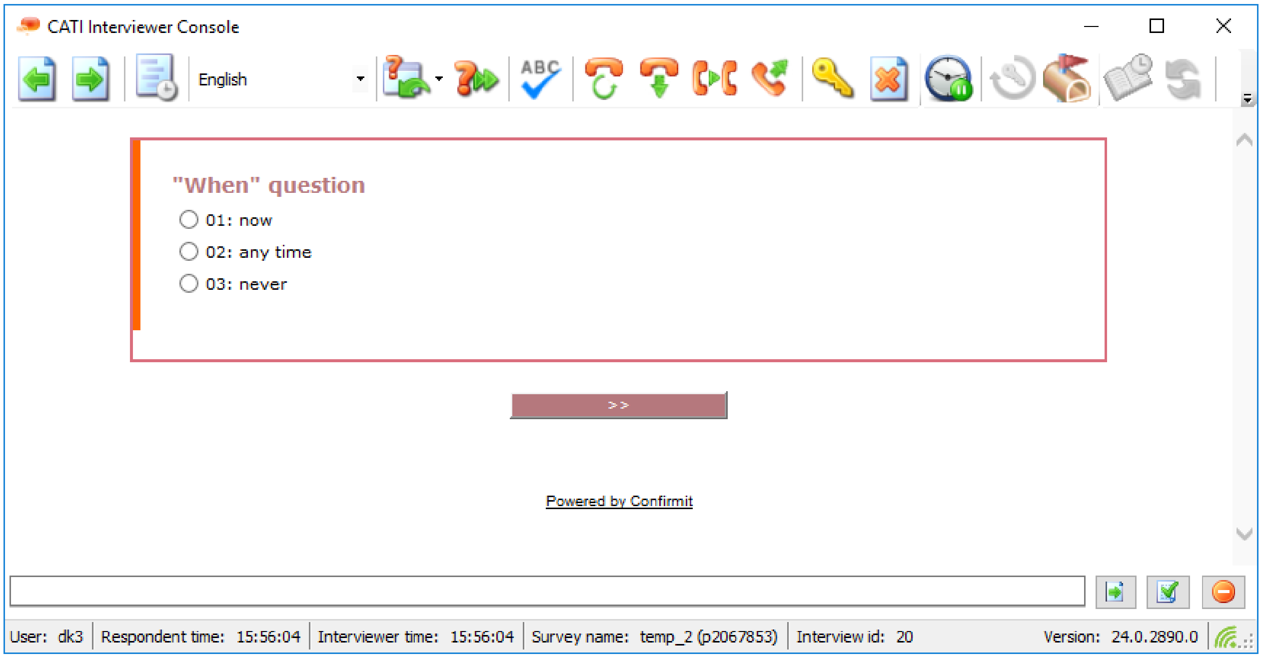


Figure 255 Example of an interview page displayed in the work area - it contains extra info, prompts and a question

Usually the interviewer goes through interview questions in the normal order. This means that he/she asks a question, listens to the respondent answer and then enters this answer.

Next the interviewer moves to another question, enters the answer provided by the respondent, and proceeds in that manner until the interview end is reached.

Note that depending on the question type (a Single, Multi, 3D Grid etc.) one page can include not a single, but 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 extra actions to be performed if required.

During the interviewing process the interviewer can perform the following actions:

- 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).

All these and other routine interviewing procedures are described in topics included in the present section.

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 task choice modes (go to Selecting a Survey/Interview on page 263 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 257 for more information). In some task choice 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 Confirmit Authoring module - refer to Confirmit 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 280 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 477 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.

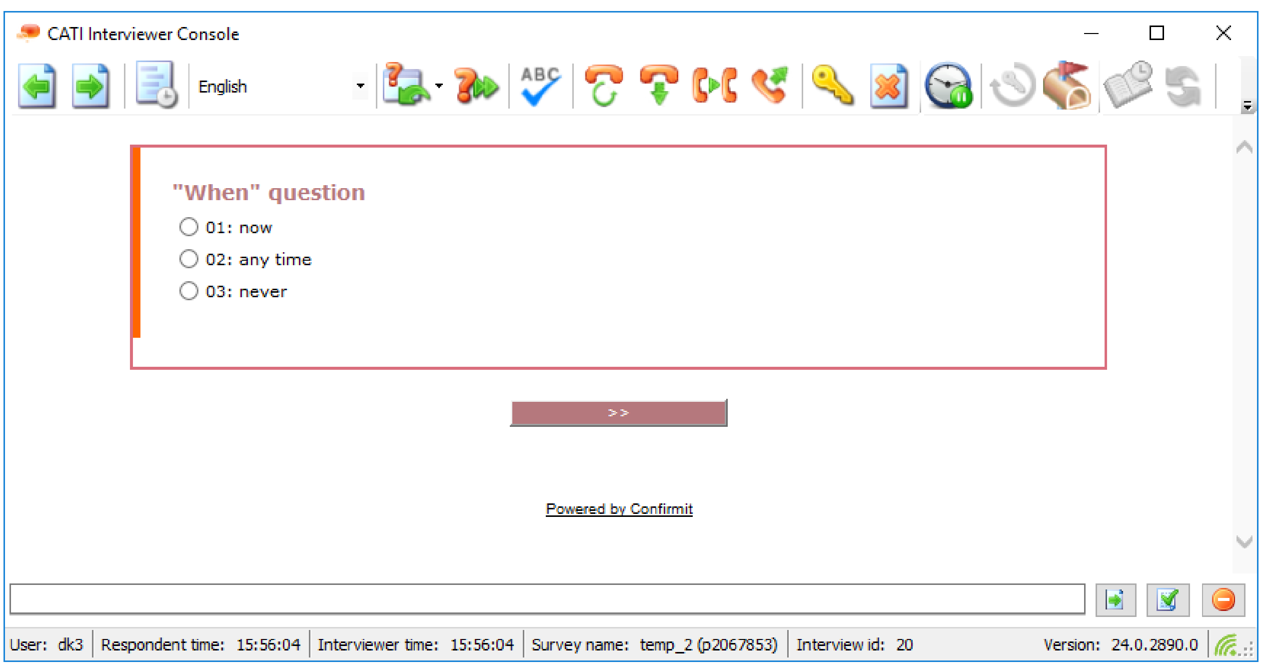


Figure 256 Selecting an answer to the question

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 297 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

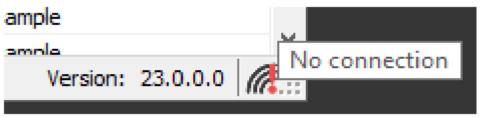


Figure 260 No connection

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.

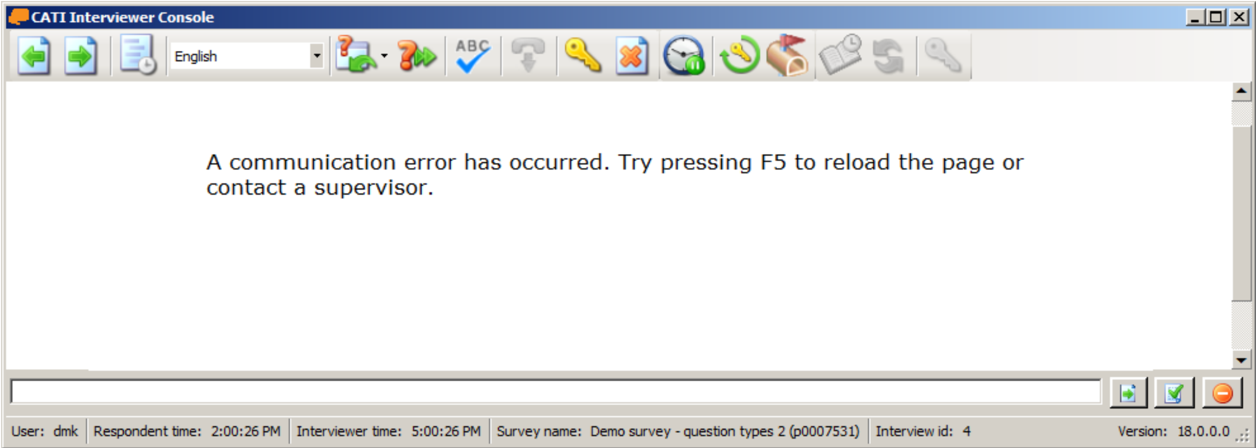


Figure 261 Warning message displayed in Console upon connectivity loss

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 484 for more information).

The Interviewer Console communicates certain Confirmit 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 task choice 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 window.

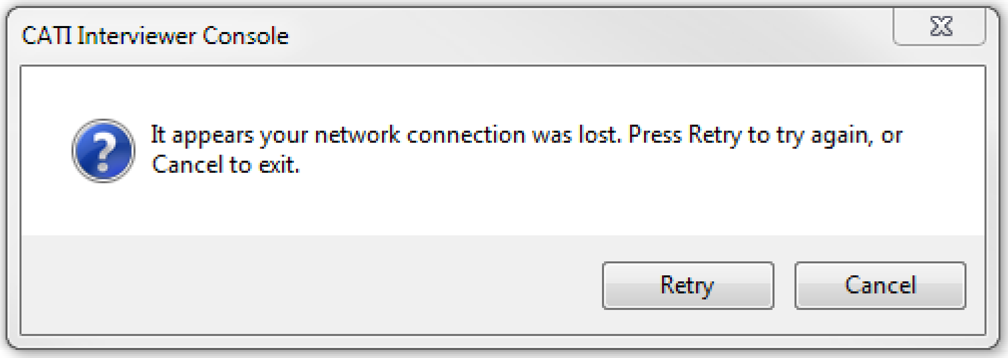


Figure 262 Connection lost during Console service activities

Selecting Retry will initiate three extra reconnection attempts. If they prove to be unsuccessful too, the same dialog window 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 333 for more information) for instructions).

Inbound call handling

(only for systems that have 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 Confirmit CATI Interviewer Console toolbar and status bar change their color to green and a corresponding badge appears on the right side of the toolbar, like this.

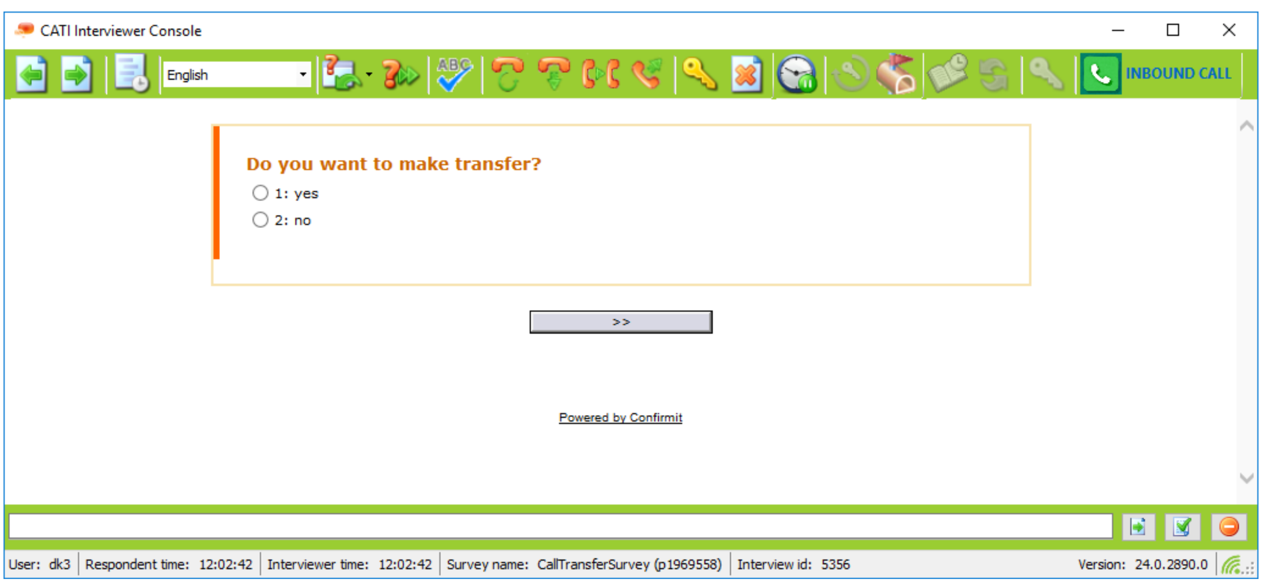


Figure 263 Indication of an inbound call

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 Confirmit Authoring module (consult the appropriate section of the Confirmit Authoring manual dealing with survey design). When the survey with the name ending in "#Test" is open in the Confirmit CATI Interviewer Console it displays a special interface warning the user that this is a test version fo the survey, see the illustration below.

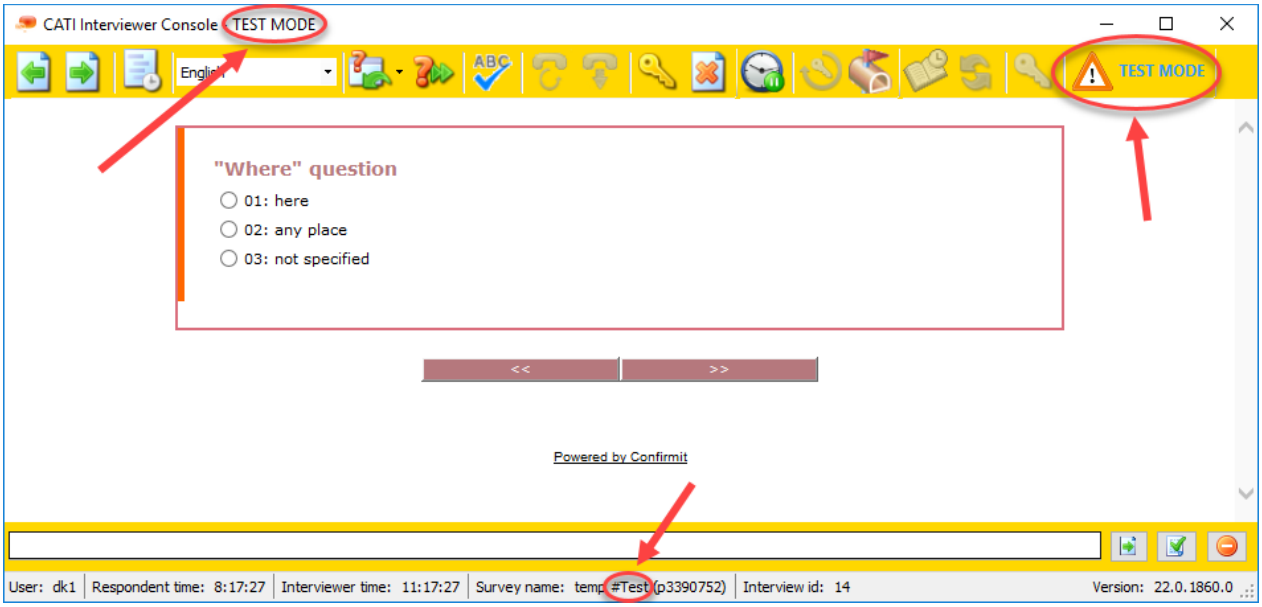


Figure 264 Survey run in the test mode

A situation is possible when a survey that has inbound calls is run in the test mode. In such case the Confirmit 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 276 for more information) for details.

Dial cancellation

When allowed by configured settings an interviewer has an option of cancelling 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 300 for more information).

The corresponding option can be found on the Interviewer Console tab of the Settings menu.

When dial cancellation is allowed, Interviewer Console will look like this at the beginning of the dial or redial procedure.

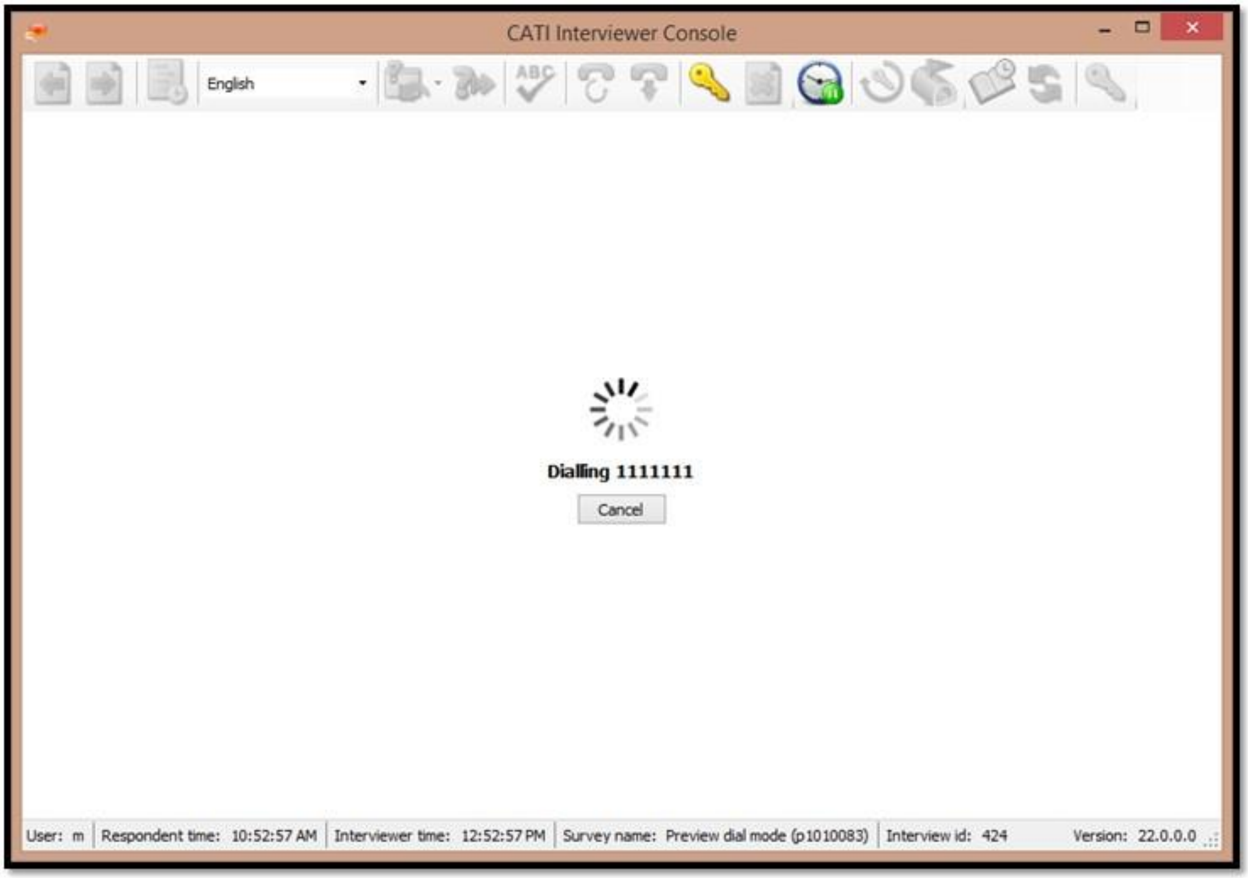


Figure 265 Cancelling a dial operation

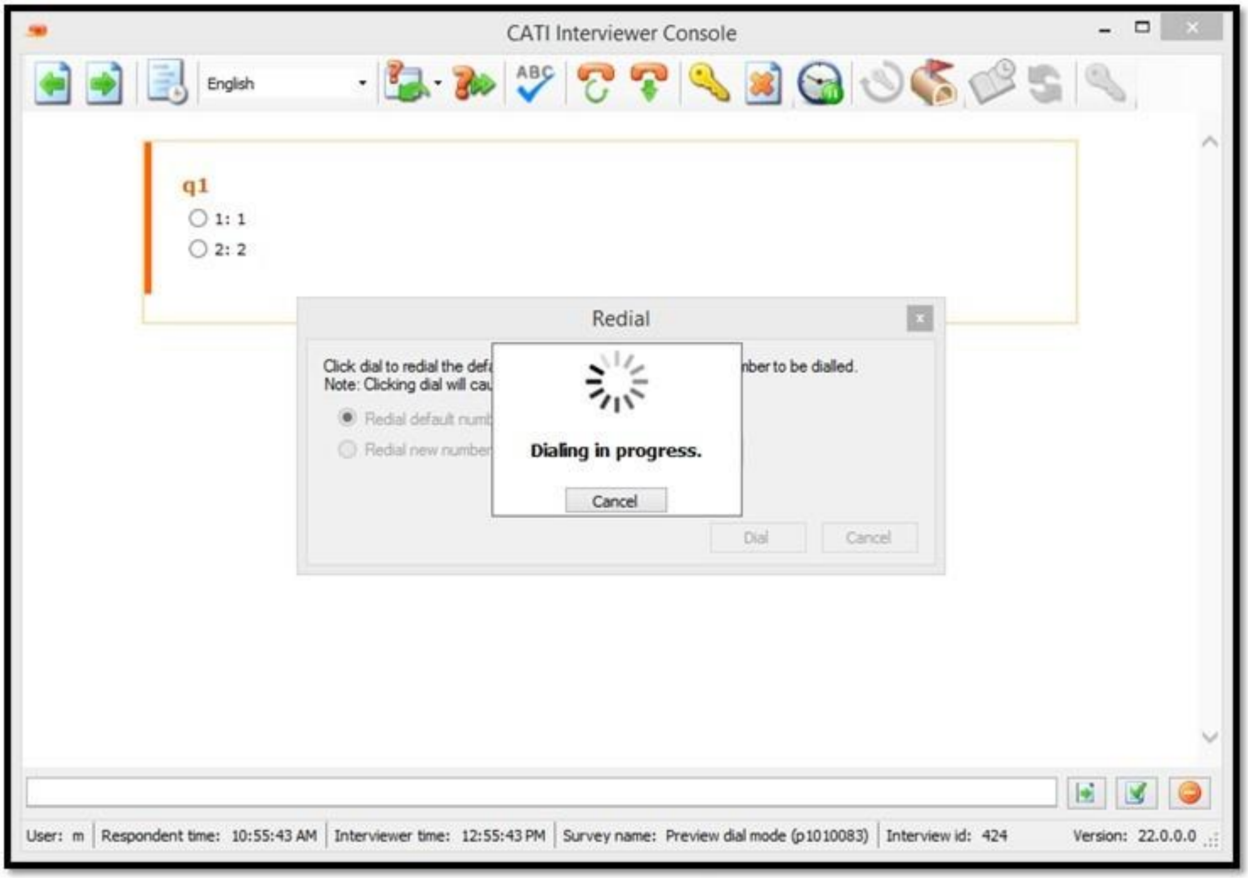


Figure 266 Cancelling a redial operation

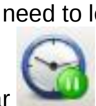
Clicking Cancel will cancel Dial or Redial operation.

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 288 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 284 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 286 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 305 for more information). An alternative way of logging out is also applicable when the interviewer works in the Manual task choice 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 303 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, possible usage hints, and limitations. Keyboard commands corresponding to a particular CATI Console function are also listed in the relevant topics.

6.8.2.1. Selecting a Survey/Interview from the Keyboard

If the interviewer's task choice mode does not assume automatic choice of a survey/interview, the interviewer can select survey/interview in the appropriate frames of the CATI Interviewer Console window. You can move focus from the survey frame to the interview frame by pressing the Tab key. Required surveys and interviews are highlighted by the cursor - you can move the cursor in the survey or interview list using Up and Down keys on the keyboard.

Click Enter on the keyboard to activate a highlighted survey/interview (if applicable to the task choice mode the interviewer works in). If you have chosen a survey by pressing Enter, next you should press Tab to move focus to the Interview frame to choose an interview. Pressing Enter after the interview is highlighted will start the interviewing process.

6.8.2.2. CATI Console Toolbar Hot Keys

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 that can be used to select a question and a corresponding answer variant on the interview page. You can also refer to the list of available hot key combinations in (go to Appendix C - List of Hot-Key Combinations used with CATI Interviewer Console on page 477 for more information).

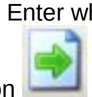
Note that by default the first question on the page is always highlighted.

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 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

You can move to the next question by pressing Enter when the keyboard entry box is empty. Alternatively you can press PgDn, or choose the Page Forward button  on the toolbar. The current question page will be submitted and the next page will be displayed (if the validation is passed).

6.8.2.5. Taking a Break

The interviewer can use the break button in the toolbar whenever they wish to take a short break from interviewing work. Before leaving the console the interviewer should switch the Interviewer Console to the Break mode, and then switch the Console back to the normal working mode when they return. Refer to (go to Interviewer on a Break on page 284 for more information) for complete instructions on the Break functionality.

Switching into the Break mode (or back to the normal working mode) is performed with the help of the Take a Break toolbar button , and the hotkey combination Ctrl+B.

Hotkey combination Ctrl+B acts similarly to the toolbar button - one hotkey combination press equals one click of the Take a Break toolbar button.

Note that the Break mode may be activated differently depending on different situations - when the interview is in progress pressing the hotkey combination will instruct Console to wait until the interview is finished (in any manner), and then switch to the Break mode. Until then you will see that the Take a Break button on the toolbar stays depressed indicating that the Console is ready to switch to the Break mode after the interview is over.

Whilst the current interview remains unfinished it is possible to deactivate the break request by either clicking the buttons again or by using the hotkey combination Ctrl+B. The Take a Break toolbar button returns to the normal state to indicate that switching to the Break mode will not be performed when the call is finished.

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 precodes entered as a comma-separated list. For example, to select precodes "a", "b", and "d" for a multi question, type: a,b,d and then press Enter. Once you have pressed Enter, the selection will be made in the form.

Note: to unmark selected categories, type them and then press Enter. Once you have pressed Enter, the selection will be canceled in the form.

- **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 will be allowed. Click the Enter key to make the selection in the form.

Note: to unmark a selected category, type it and then press Enter. Once you have pressed Enter, the selection will be canceled in the form.

- **Open questions** – you can type any text into the keyboard entry box. When you press Enter, the text will be copied into the form.
- **Grid** and **3D-Grid** questions – these question types should be handled as separate questions. This means that the highlighting of questions should highlight each "question" inside this grid/3D grid. The keyboard entry box will behave differently dependent on the underlying question. For example, a grid can be seen as multiple single questions. 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: for Grid questions with slider option the keyboard input is not supported.

- 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: It is possible to supply answers for date-questions via keyboard in the following way: type date as string into the Input textbox of the date-question or into keyboard entry box (in the lower left area of the console) and submit the text.

- Questions with **searchable answer list**. The keyboard entry is supported only to input search text (the "search' text disappears when the interviewer sets focus; typing in the text should filter the list). The interviewer cannot use the keyboard to supply answers.
- The interviewer cannot use the keyboard to supply answers for **capture ordered** questions, keyboard input **is not supported** for these questions.
- The interviewer cannot use the keyboard to supply answers for **grid with grid bars** option, keyboard input **is not supported** for these questions.

6.8.2.9. Choosing Precodes in the Questions

The CATI Console shows precodes for all questions except for the following:

- **Open Text List** question
- **Numeric List** question
- **Ranking**
- questions with ‘**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 precodes are not shown.

6.8.2.10. Support of Default and Refused Functionality

Categories with "Default"\"Refused" properties specified can be selected in Console not only by "Default" or "Refused" button, but with the use of keyboard or mouse as well. Such selection can be done via selecting the corresponding category using mouse or making the keyboard entry using precodes. The following hot keys are supported: Ctrl+R - for "Refused" and Ctrl+D - for "Default".

In case of several questions per page the "Default" and "Refused" answer variants are chosen separately for every question (for which default/refused functionality is available).

In case 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 have been chosen, choosing a "Multi" category automatically deselects the "Exclusive" category.

If "Other" category is specified as the "Refused"\"Default" parameter for a "Single"\"Multi" question - when "Other" category is chosen, the focus is set to the "Other" text field of chosen category.

For "Single" questions with "Other" categories specified - when changing the choice of "Other" category you should 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

It is possible to select scale for categories with "Other" option turned on and fill in "other" text via the keyboard.

6.8.2.12. Keyboard Support in Open, 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 from keyboard, you will have to press the Insert key.

Pay attention to how the Enter key acts when you are typing the text in the Open field which contains more than one line. When the focus is set on one of the lines in the Open text field pressing the Enter key will move the caret - another line will be inserted (just like in a text editor). Enter key does not submit the answer when the focus is set on the Open field.

6.8.2.13. Keyboard Support in Multi Questions

In case 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 - you can enter text in this field using the keyboard.

For "Searchable multi" questions it is possible to type the search text via keyboard. The focus is set to the "search" field by default. Typing in the "search" field filters the list - only answers with the matching precode are left 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 as unanswered.

6.8.3. Interviewer on a Break

Any interviewer is allowed to leave their working place for a short period of a time - to take a break. If they do so, they should inform the system of their absence by manually changing their log-in status. To take a break the interviewer should click the Take Break button on the console toolbar. Each break is of a paid or unpaid type. Break names and types are defined by a supervisor on the Break Classification tab in the Resources section (see (go to Configuring the Break Classification on page 374 for more information)).

All breaks the interviewer has taken are logged, and are available in a number of reports (see (go to Generating the Interviewer Sessions Report on page 427 for more information), (go to Generating the Interviewer Productivity Report on page 417 for more information)).

The supervisor can monitor current interviewer status (currently working, or is on a break) using the Interviewer List in the Activity Views (see (go to Monitoring Interviewers and their Work on page 315 for more information) for details).

To take a break:

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 Ctrl+B hot key combination on the keyboard. The drop-down menu is displayed then - see the illustration below.

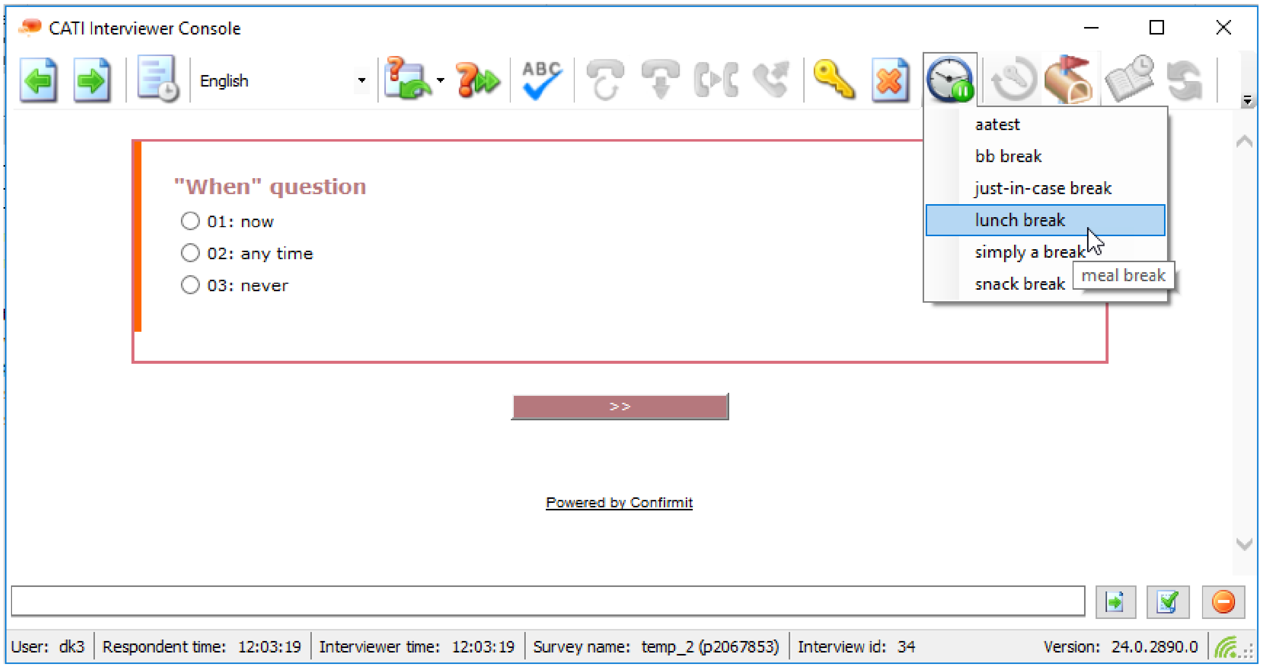


Figure 267

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 descriptions. 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..

2. When an interview is in progress the button will stay depressed  until the current interview is finished and after that 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.

   When the Console switches to the Break mode, its interface will look like this (see the picture below).

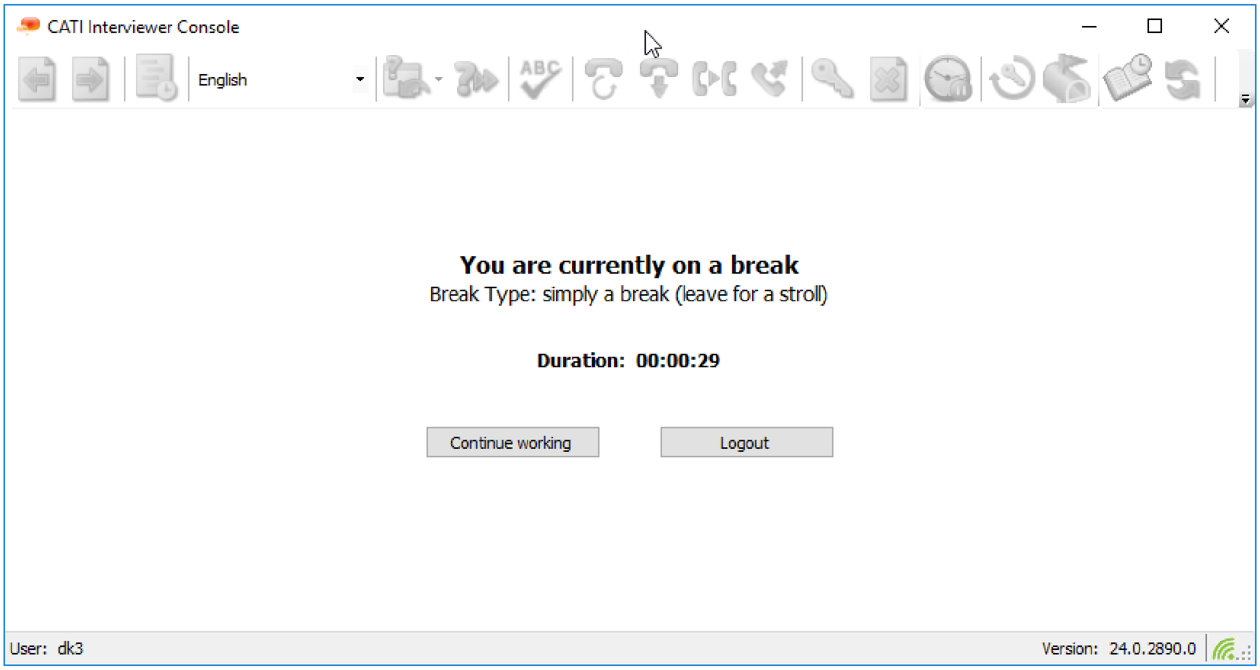


Figure 268 CATI Interviewer Console indicating the interviewer has taken a break

The counter displayed in the Break mode shows the time elapsed from the moment the Console has switched to the Break mode (in HH:MM:SS format). It stops when either the Continue working, or Logout button below the counter is pressed.

3. When the interviewer is back, 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.

   In case the work is continued, CATI Interviewer Console behaves depending on the current interviewer's task choice mode.

   In case the interviewer presses the Logout button the system logs this interviewer out.

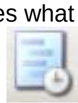
6.8.4. Making an Appointment

In the event the respondent wishes to continue the interview at a later time, the interviewer can postpone the interview and make an appointment. This means that he/she creates a reminder in CATI Console, which will activate and start this postponed interview when the time specified in the appointment is due. The appointment is not automatically assigned to the same interviewer that has created it - all appointments are assigned to the interviewers by the Supervisor. An appointment can be made only for the started interview.

A situation is possible when the Appointment dialog window which is used to create an appointment is forcibly displayed in the course of an interview. When appointment creation was not initiated by the interviewer this means the appointment 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:

1. When the interview is started, and the respondent states that he/she wants to postpone it, the interviewer inquires what time is convenient, and after the exact time is arranged he/she should click the Appointment button , or press Ctrl+A on the keyboard.

   This will display the Appointment dialog window.

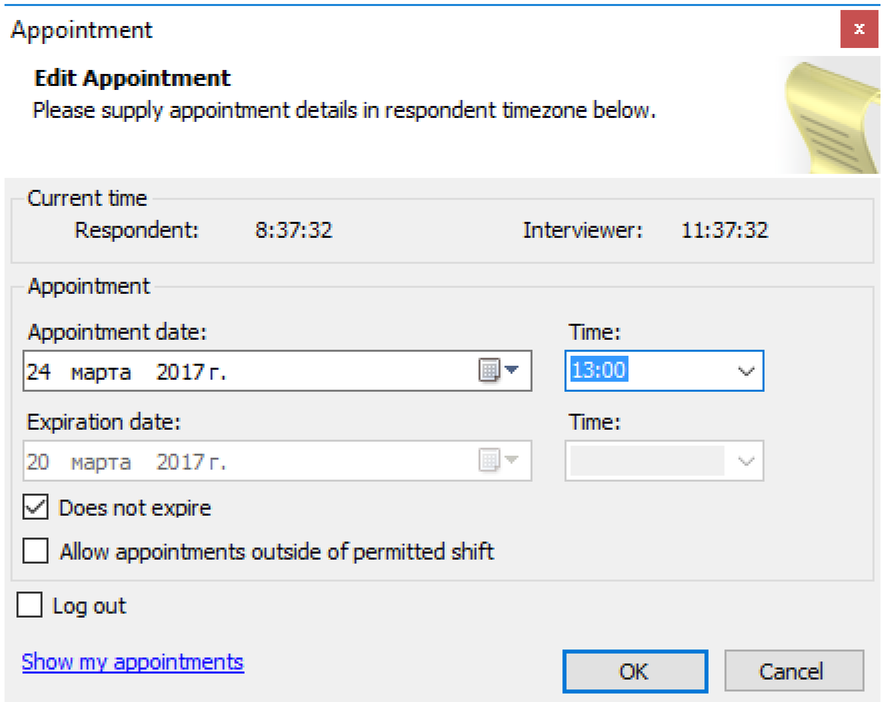


Figure 269 The Appointment dialog window

2. The Appointment dialog window will display the interviewer and respondent current time (in the Current time group). Use it to estimate the situation.

   The Appointment group contains the set of fields required to specify appointment details.

3. Choose the date when the interview should be started again – click the arrow button in the Appointment date field. This will display the calendar form.

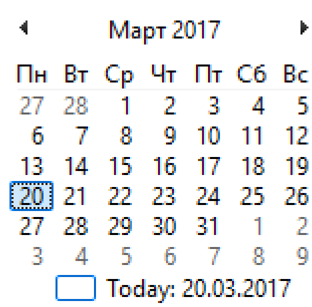


Figure 270 The Calendar form used with the Appointment dialog window

   You can cycle through months and years by pressing arrow buttons at the top of this form. To select the particular date click the one you need in this form. The prompt showing the current date is displayed in the bottom of this form. Click it to select the current date.

   The Time drop-down field allows choosing from the list of predefined times in half-hour increments.

4. You can set up the expiration time, or you can set the appointment to never expire. In case the "Does not expire" box is checked the appointed interview will be delivered to the interviewer irrespective of the time and date he/she logs into the system (given the interview is already due).

In case the Does not expire box is cleared Expiration date field becomes available and the expiration date and time can be set up similarly to the appointment date and time (see the instructions given for the previous step).

When the expiration date and time are set up, the appointed interview will be started only in case the current date and time do not exceed the current date and time. If expiration date and time pass, the interview is considered not to be scheduled anymore, and it will not appear in the list of assigned interviews until supervisor schedules and assigns it again.

5. The interviewer can create an appointment outside of the boundaries of the permitted shift. To do so they should tick the "Allow appointments outside of the permitted shift" checkbox. It does not matter if they do it before or after specifying the appointment date and time. But this box should be checked before the interviewer creates an appointment by pressing OK in the Appointment dialog box.

   In case the "Allow appointments outside of the permitted shift" checkbox is not displayed it means that the supervisor has forbidden the interviewer to create such appointments.

6. Also there is a possibility to specify whether the interviewer wants to log out of CATI Console after the appointment is made.

   To do this you should check the Log out box in the bottom of the Appointment dialog window. This will initiate log out immediately after you click OK in the current appointment dialog window.

7. You can view the list of appointments that were assigned to you by the supervisor. Follow the Show my appointments link in the bottom of the Appointment dialog window. This will display the Interviewer Appointments dialog window containing all the appointments you have made (go to Viewing the List of Appointments on page 262 for more information).

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 (see (go to Interviewer Console Settings Section on page 464 for more information) for information).

8. Finally click OK in the Appointment dialog window to confirm the appointment time and close this dialog window.

9. After the dialog window is closed, the CATI Interviewer Console will be ready to start the next available interview, or, if there are no assigned interviews left, will display a message suggesting to wait for the next one to be assigned to the interviewer.

To handle an appointment forced in the course of an interview:

1. When the Appointment dialog window is forcibly displayed in the course of the interview this means that it was planned to be displayed by the person who designed the survey.

   This is a regular Appointment window - in this situation you should treat it as if you are going to create an appointment yourself. You may create the appointment and in that case the interview will finish as an appointment. Or you may cancel this appointment and in that case the current interview page will be shown and the interview will continue.

   Refer to the instruction above for the detailed procedure description.

6.8.5. Performing Call Transfers

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 a 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.

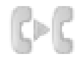
An Internal call transfer can be enabled separately, or together with the External Call Transfer. In the first case only the Internal Call Transfer button becomes available in the Interviewer Console toolbar.

When both Internal and External call transfer are enabled, the External Call Transfer button becomes available alongside the Internal Call Transfer button.

A call transfer can be either of a Blind or of a Warm type.

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 (see the illustration below). Then the system takes over the transferred call and handles it. The initial interviewer then becomes free to resume interviewing with new records.

A "Warm" call transfer means the initial interviewer contacts the target interviewer (third party person) to conduct a conversation prior to transferring a call. The CATI system provides the initial interviewer with an option of establishing independent contact with a respondent, a target interviewer or holding a three-way conversation with both of them when all three parties can talk to each other.

The type of call transfer which is initiated by default (when a Call Transfer button is pressed) depends on the corresponding option specified for the survey (refer to (go to Viewing and Modifying a Survey's General Properties on page 72 for more information) for description of the call transfer options available as general survey settings). For the Internal call transfer it can be "Warm", "Blind" or "Off". If an "Off" option is selected in the CATI Supervisor module for Internal Call Transfers the Internal Call Transfer button is grayed out  and becomes unavailable. For the External call transfer it can be only "Warm" or "Blind". The default mode is warm.

Only already started interviews (calls) can be transferred to another person.

The interviewer should keep in mind that once a call transfer is initiated in blind mode it cannot be canceled.

Refer to (go to Internal Call Transfer on page 289 for more information) for instructions regarding the Internal call transfer procedures and to (go to External Call Transfer on page 294 for more information) for External call transfer procedures.

6.8.5.1. Internal Call Transfer

When an interviewer needs to transfer a call to another agent working in the same company, they choose 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 pressed depends on the corresponding option specified for the survey (refer to (go to Viewing and Modifying a Survey's General Properties on page 72 for more information) for description of the call transfer options available as general survey settings).

A situation is possible when an internal call transfer cannot be initiated. There are two reasons for this:

a. There is no interviewer group in the current company which has the appropriate "Allow call transfers" option enabled (go to Adding and Deleting an Interviewer Group on page 14 for more information)

b. No groups or no interviewers in the current company are assigned to this survey.

In such case a notification is displayed explaining the reason for this. Pressing OK will close this window and return the interviewer to the last interview question.

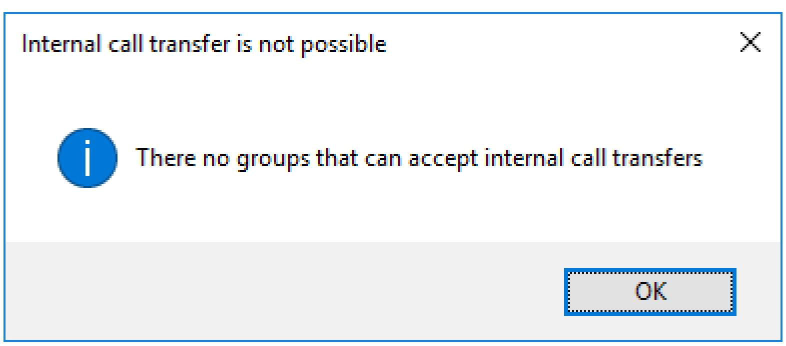


Figure 271 Notification of the impossibility to perform the Internal call transfer

Pressing OK will close this window and return the interviewer to the last interview question.

Otherwise, the Internal Call Transfer window is displayed. Call transfer type is indicated by the dialog window name displayed in the title bar. The picture below shows the window displayed when an internal call transfer mode is initialized by an interviewer.

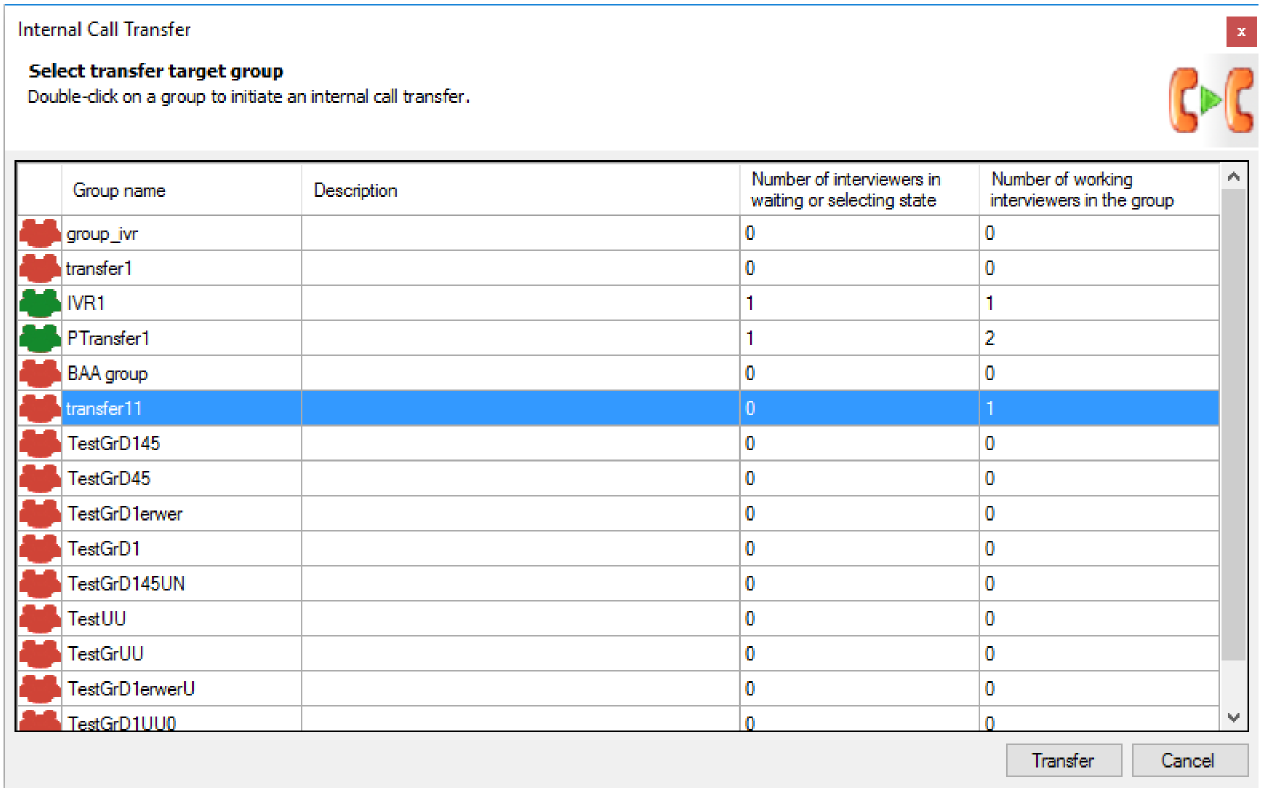


Figure 272

The Internal Call Transfer window contains a list of interviewer groups which belong to the same company as the current interviewer's group and are 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 - the group name;
- The description of the group - optional group description;
- The number of interviewers in the "Waiting" or "Selecting" state - shows how many interviewers are free or are potentially available for accepting 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.

Interviewers are in a constant state of flux but the icon in the leftmost column indicates whether a group has interviewers who can potentially accept a transferred call (who are currently in the Waiting or Selecting state). When it 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 take this group into consideration if there are no better candidates, some interviewer is estimated to get free soon. When the icon is green it means some interviewers are free at the moment and an interview can be transferred to this group immediately.

The above mentioned information helps the interviewer to decide: which group is a better choice to transfer an interview to.

To start the Call transfer operation the interviewer should click the Transfer button in the bottom of the Internal Call Transfer window. The Internal Call Transfer window will then close. 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 Internal Call Transfer window closes when the Transfer button is pressed. The interviewer will get no further notice regarding the transferred interview. Then, in case there are more calls assigned to this interviewer, another interview will be started for them .

Internal Warm Call Transfer Mode

The Internal Call Transfer window closes when the Transfer button is pressed. The Internal Warm Transfer dialog window is displayed next - see the picture below.

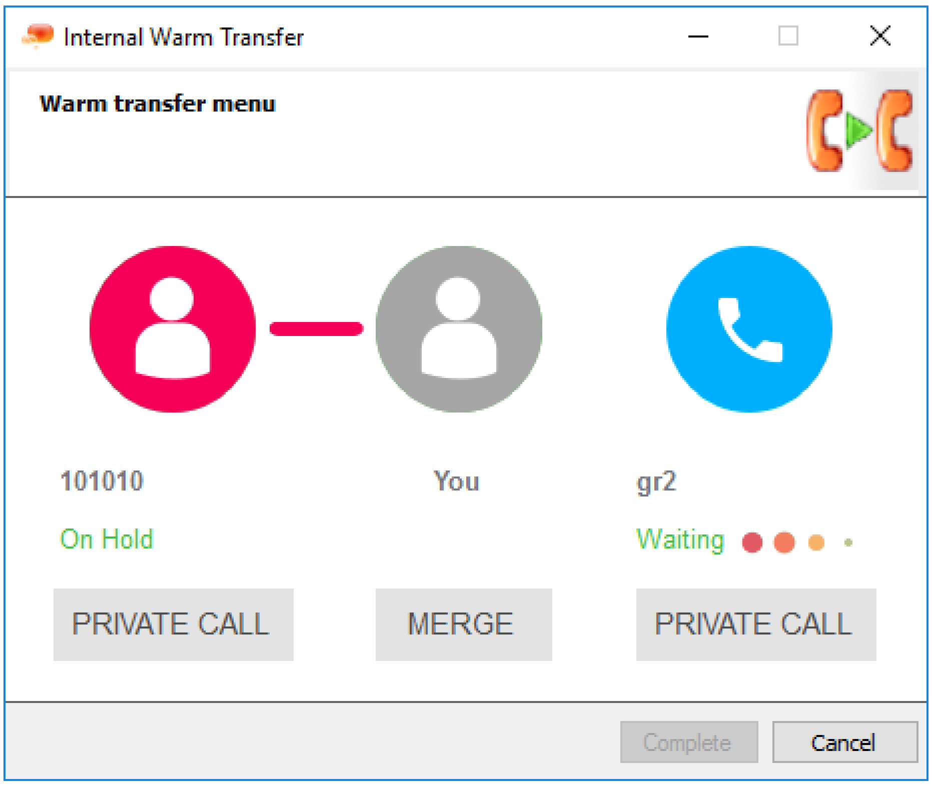


Figure 273

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 window 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 window are unavailable.

The dialog window shown above illustrates the situation when the initial interviewer waits for the connection to be established with the target agent.

It should be noted that the receiving interviewer cannot cancel call transfer. They see the following notification displayed on the Interviewer Console main screen when a transferred call is delivered.

Figure 274 Notification displayed in the Interviewer Console to inform the target agent of the incoming call transfer

When the target agent sees the above notification they should wait a little for a connection to be established and talk to the initial interviewer.

When the connection is established, the initial interviewer can talk to the target interviewer. At this moment the "Private Call" button on the side of the respondent becomes active alongside the "Merge" button (see the picture below).

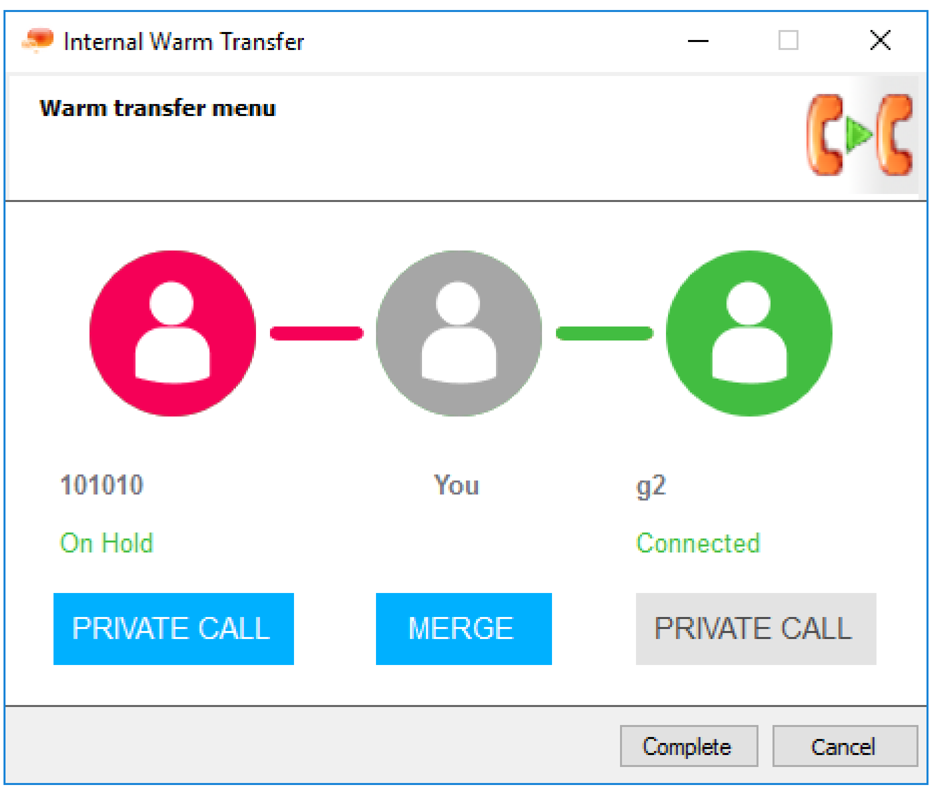


Figure 275 Connection with the target interviewer is established

The initial interviewer may click the "Private Call" button to talk to the respondent in private if there is a need. Another option (depending on the situation) 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 presses the "Private Call" button and connects to the respondent he is automatically disconnected from the target interviewer. Then the "Private Call" button on the side of the target interviewer becomes active while the "Merge" button stays active (see the picture below).

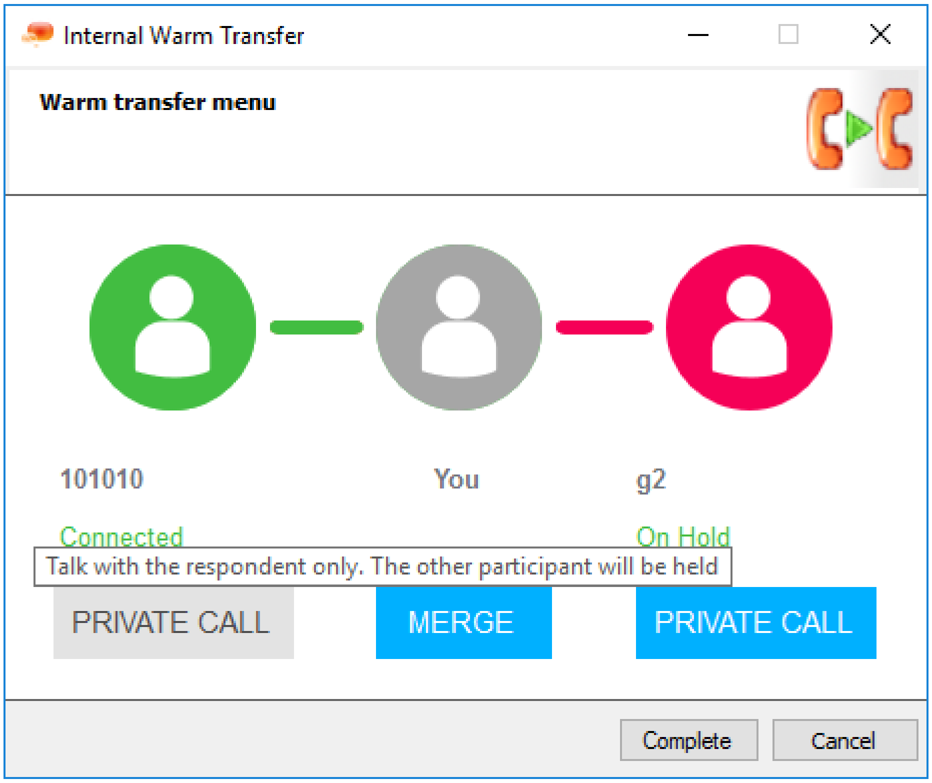


Figure 276

When the Merge button is pressed a three-way conversation is initiated where all parties can hear each other - see the illustration below.

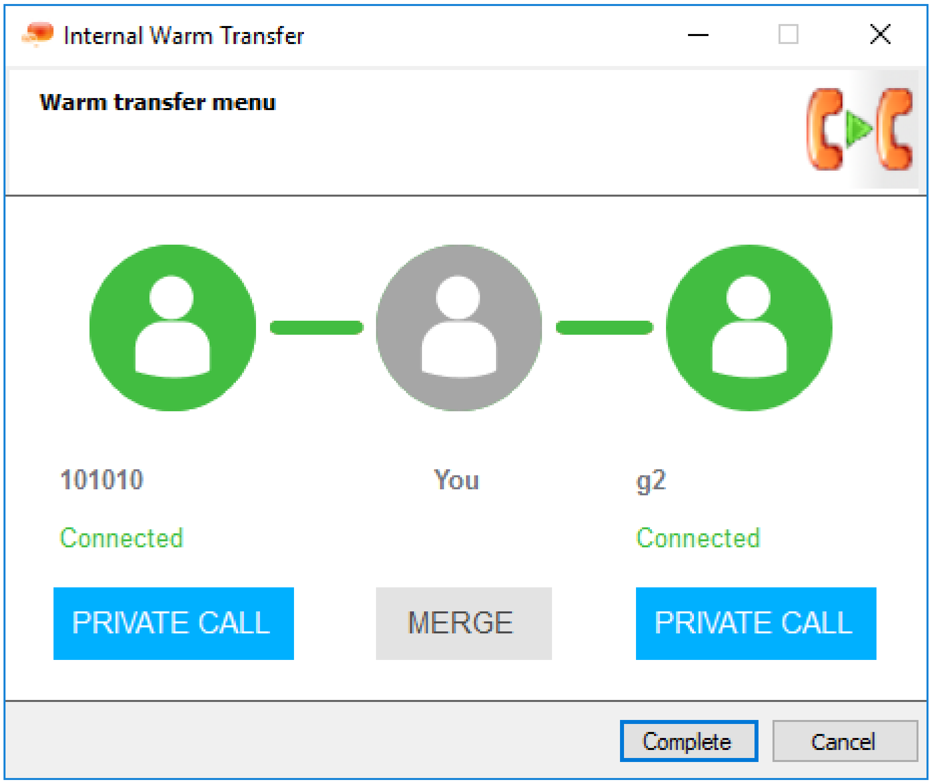


Figure 277 The initial interviewer presses the Merge button - all parties can communicate with each other

When the Merge button is pressed the system makes available the Private Call buttons both on the respondent and on target interviewer side. The initial interviewer can swithc to a private conversation with any party.

Tooltips pop up when the mouse pointer is hovered over buttons in the dialog window. They explain what actions will take place when the button is pressed.

The final action the initial interviewer should undertake is either to switch the interview to the target interviewer by pressing the **Complete** button, or cancel the call transfer procedure by pressing the **Cancel** button.

When the **Complete** button is pressed the initial interviewer is disconnected from both the respondent and the target interviewer and the interview is considered finished for him/her - they become free for the next interview.

The interviewer should keep in mind that once a **Complete** button is pressed (a call is completely transferred) this action cannot be undone and they lose control over the procedure by passing it over to the target interviewer.

It should be noted that the receiving interviewer cannot cancel call transfer. They see the following notification displayed on the Interviewer Console main screen when a transferred call is delivered.

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 choose the External Call Transfer button  . The External Call Transfer window is then displayed.

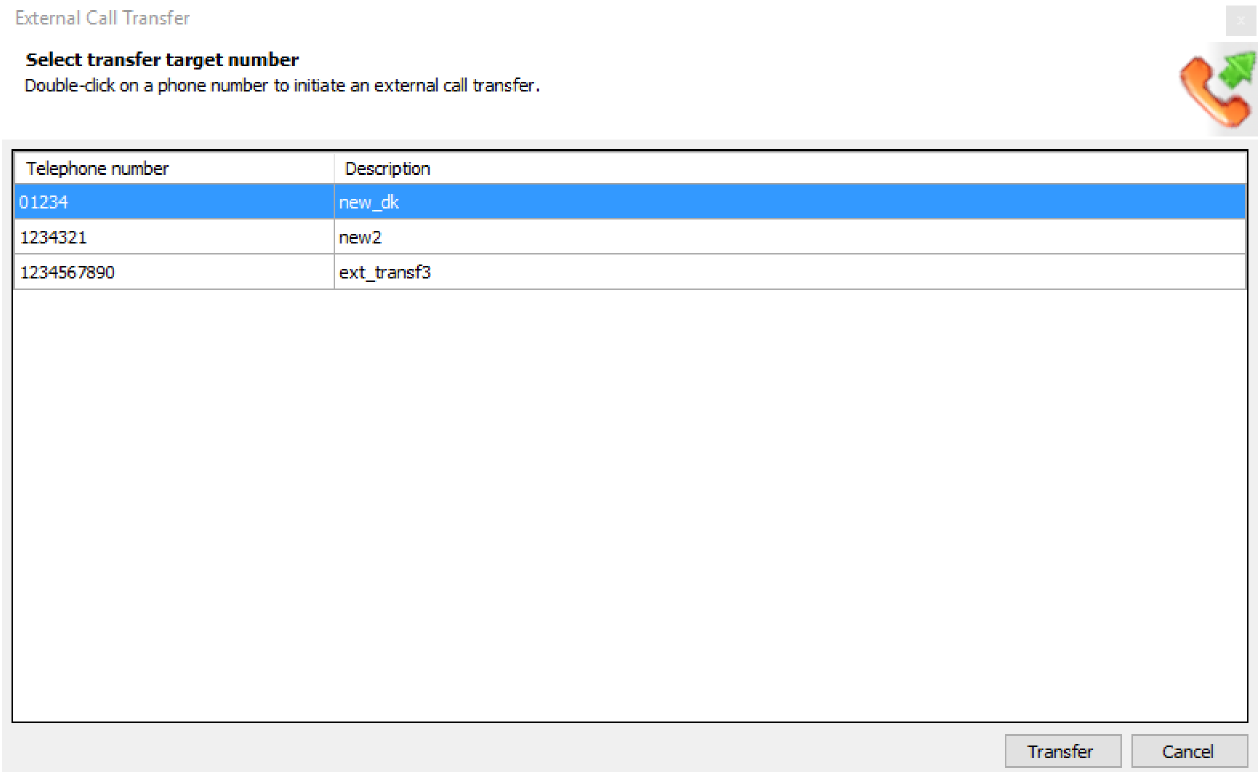


Figure 278

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 (refer to (go to Configuring the External Transfer Settings on page 388 for more information)for information).

The External Call Transfer window contains a list of telephone numbers which belong to third party companies and are considered "external". This list provides the following information:

- Telephone number - the external telephone number assigned to the current survey;
- Description - an optional description of the telephone number.

To start the Call transfer operation the interviewer should choose a telephone number from the list and click the Transfer button in the bottom of the External Call Transfer window. For a blind transfer the External Call Transfer window will then close and, in case there are more calls assigned to this interviewer, another interview will be started for them, and the interviewer will get no further notice regarding the transferred interview.

For a warm transfer the warm transfer dialog window will appear, this looks and functions exactly like the dialog described above for the Internal Warm Call Transfer scenario, see (go to Internal Call Transfer on page 289 for more information).

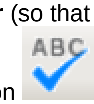
6.8.6. Spell-Checking the Answers

The interviewer can check the spelling of the "free text" answers. Spell checking can be invoked during both the interview and openend review stages. Spell checking 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 the word.

The misspelled words are found and displayed in sequence, one after another, thereby allowing for consequent check and correction. There is also an option to ignore a single 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 the keyboard.

   The Spell Check dialog opens.

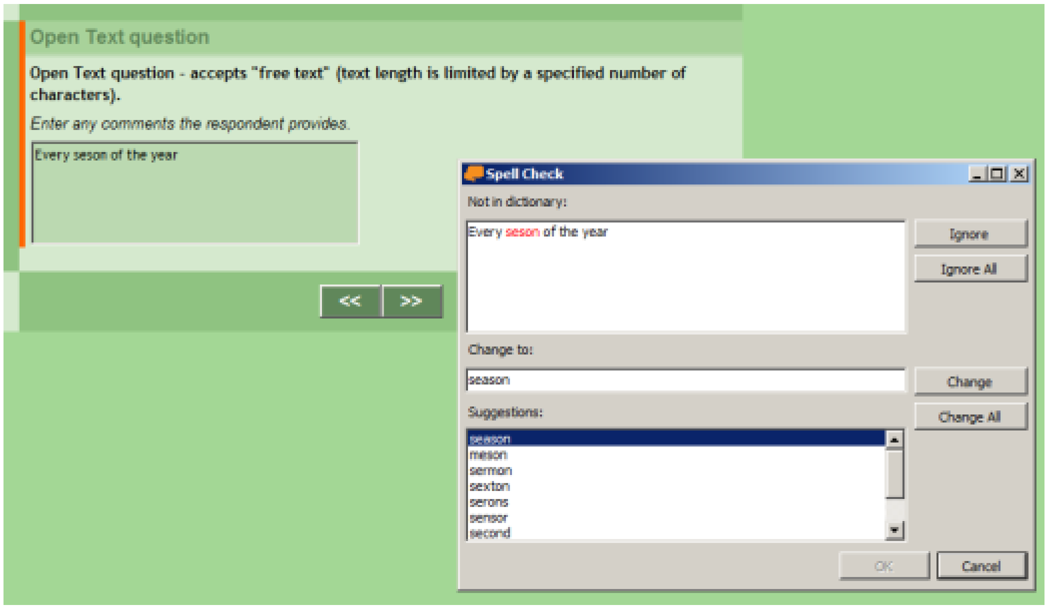


Figure 279 The Spell Check dialog window

The Spell Check dialog consists of three fields and a set of buttons.

- The Not in dictionary field displays all the spelling errors it finds in all the text fields on the current page.
- The Change to field is used to enter the user variant which would be used to replace the corrected word.
- The Suggestions field displays the list of words that CATI Interviewer Console suggests to use instead of the incorrectly spelled word (which is displayed in the Not in dictionary field).

  A set of buttons located to the right of the listed fields allows to apply the selected changes or leave the word as it is.

4. After the Spell Check dialog is invoked it displays the first answer (the complete answer text) containing an error (in the Not in dictionary field). 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 is selected in the Suggestions list is displayed in the Change to field. This field is open for editing - the interviewer can edit the word the way he needs.

   The word from the Change to field is used to replace the highlighted misspelled word.

5. To replace the highlighted misspelled word you should click the Change button.

   When the Change button is pressed 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 you should click the Ignore button.

When the Ignore button is pressed the highlighted word in the Not in dictionary field is NOT replaced, but the highlighting is removed.

In case you know there are other words in the current answer text which are completely similar to the highlighted word, you can use the Change All button (to replace all similar inclusions at once), or Ignore All (to leave all similar words unchanged).

6. After the interviewer presses either the **Change** or the **Ignore** button, the Spell Checker highlights the next misspelled word in the same answer text. Repeated for that word.
7. 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). The procedure described in steps 4 to 6 should be repeated for all misspelled words in this answer.
8. When the Spell Checker cannot find another answer containing the misspelled words, it blanks all the fields and displays the "Spell check complete" message. The OK button in the Spell Check window becomes active at the same moment.

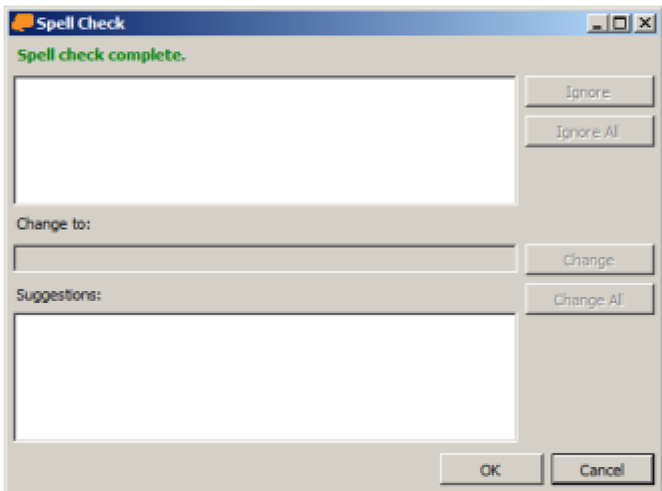


Figure 280 Spell Checker - when the spell checking procedure is completed

Click **OK** to submit all the corrections you have made using the Spell Check window.

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, but the answers on the interview page are updated only when you finally click OK and close the Spell Check window.

Changes are submitted to the Confirmit server only after the interview page is submitted, not when the answer text is updated in the interview page.

6.8.7. Modifying an Answer

The Redo and Fast Forward commands.

In case the answer variant the interviewer has entered for one of the previous questions of the current interview is considered incorrect (for some reason), the interviewer is able to return to that question and select another answer variant(s).

CATI Interviewer Console also provides a way of quickly returning back to the first question in the interview for which no answer has been provided.

To modify an already entered answer:

1. When the interview is started, the interviewer is able to return to any of the previous answers to correct the answer variant by pressing the Redo button .
2. When the Redo button is pressed it displays the drop-down menu listing all the answered questions (by the question name) from the current interview.

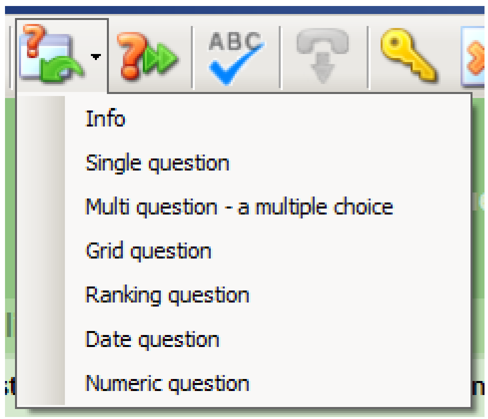


Figure 281 The Redo button drop-out menu

The interviewer should select the required question in this list.

3. This will display the selected question in the work area of CATI Console in place of the current question. The displayed question will contain the old answer variant – choose another one from the list.
4. Next you can either:

- click the Next button in the interview page, or
- click the Fast Forward button  on the toolbar, which will take you to the first question in the interview for which no answer was provided (see description below for details).

CATI Console provides the interviewer with a convenient feature of jumping to the first question for which no answer has been provided. For example, you decided to modify the answer variant selected for some previous question, and you select this question from the drop-down list provided by the Redo command. This can take you a number of questions away from the current interview page. Instead of wasting time on moving back through questions one by one waiting for the work area to refresh you can jump right back.

To skip to the first question page for which no answer has been provided:

1. After you have navigated away from the current interview question click the Fast Forward button  on the toolbar, or press Ctrl+Enter on the keyboard.

   The work area is refreshed; the first question page for which no answer has been provided is displayed. This should be the first question in the interview (counting from the beginning) for which no answer has been provided.

Note that the Fast Forward command takes you to the first question in the interview which has got no answer provided, not to the question you have left from to perform the Redo command.

6.8.8. Selecting an Interview Language

The interviewer can select a language in which interview questions and answer variants are presented in CATI Console.

Language choice can be performed independently for each interview.

Languages are selected from the list of those available for the current survey.

To select an 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 current survey properties.

2. When another language is selected in the Language drop-down box, the work area refreshes, and the interview questions and answer variants are presented in the chosen language.

6.8.9. Sound Playback Audible to a Respondent

CATI Interviewer Console provides a facility that allows playing sound files to a respondent. This can be a jingle, or some recorded speech - anything that aids the interviewing procedure.

The name and location of the sound file that could be played back for a respondent is an option which can be specified for each survey page when it is composed in Confirmit Authoring. Survey author also specifies whether the sound file should be played automatically, or the playback would be started manually by an interviewer.

Sound file playback is available only if a company uses the dialer, and in case the dialer was used by the interviewer. Sound file playback is available with dialers of both types - TCI and Pro-T-S. Playback functionality is similar in both cases. The only difference is that the Pause button is not available with the Pro-T-S dialer systems.

If CATI Interviewer Console encounters a link to a sound file when a question page is being loaded, it displays an extra set of toolbar buttons which could be used to control the playback of this sound file - Start , Pause and Stop buttons. These buttons are available regardless of the playing mode specified for the sound file (it can be either Automatic or Manual).

Besides there is a button that allows switching between the voice sources in case audio file playback is started - see description of this facility below. This button is called Toggle Voice Source .

Voice source toggling is available only with the TCI dialers.

If the sound file should be played automatically, CATI Interviewer Console starts the playback upon loading of the question page. When the next page starts loading, 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 playback should be started manually, CATI Interviewer Console simply displays playback control buttons in the toolbar - the interviewer can start the playback at any moment (while the question page is still displayed in CATI Console window).

Interviewer can control 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 playback if pressed when playback is in progress.

In case an audio file playback is used in the course of the interview, the interviewer stops hearing the respondent over the telephone line - he can hear only the sound file being played. The Interviewer Console allows the interviewer to switch between voice sources - he can choose whether he listens to the sound file being played over the telephone line, or whether he listens to the respondent voice. The interviewer is free to switch back and forth between these two voice sources while the interview continues. This facility is available only with the TCI dialer type - it is not supported with the Pro-T-S dialer types, and the corresponding button in the console toolbar is not displayed when the Pro-T-S dialer is used.

How to handle the sound file playback:

1. Start the interview. When the interview page containing a link to the sound file is displayed in CATI Interviewer Console, it will contain an extra set of toolbar buttons and may look like this.

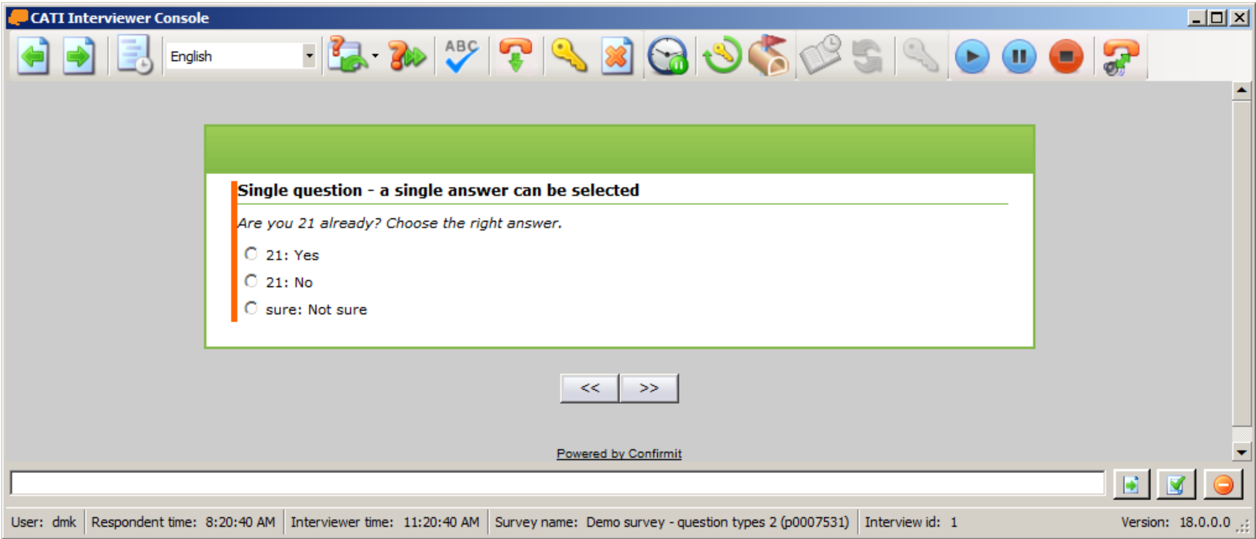


Figure 282 CATI Interviewer Console displaying an extra button set which allows controlling the audio file playback

Depending on the specified playback mode the sound file will either start playing back automatically upon loading of the page, or the interviewer will have to start playback manually by pressing the Play button  on the toolbar.

2. Depending on the situation you can pause, stop, or restart the playback by pressing the appropriate buttons.
3. When you click the Next, or Previous button, CATI Interviewer Console checks if there is a sound file link on the page that starts loading and will act appropriately (see behavior description in the topic introduction above).

   Again, you can use toolbar buttons to control playback on another page.
4. When the audio file playback is started, and you cannot hear the respondent (only the currently played voice file is audible) - click the Toggle Voice Source button  . This will switch the voice source making the respondent's voice audible. Note that the respondent will not hear your voice.

6.8.10. The Redial Functionality

Whenever the interviewer needs to redial the number they can use the Redial functionality provided by the CATI Interviewer Console.

The main idea of the Redial function is to provide the interviewer with the ability to restore the broken phone connection, or to switch to another telephone line at the respondent's request. Other situations in which the redial function comes handy are also possible.

Note that this functionality is available only for surveys which are set up in any dial mode but in Manual. Also the Redial functionality is not available for interviewers working in the Manual task choice mode.

The Redial function allows the interviewer:

- to redial the default[1] phone number;

[1]The default number is the original number loaded to the 'TelephoneNumber' system field as background sample data.

- to enter and dial any other phone number.

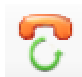
The Redial functionality does not in any way interfere with the interviewing process in the CATI Interviewer Console. When the Redial function is used the interview which is in progress at the moment in the Interviewer Console continues as usual. The current interview page is being displayed in the Console window and this interview is being continually timed. The time spent on redialling is counted as the time spent on the current interview.

The Redial function is started when the Redial button on the Interviewer Console toolbar is pressed. The Redial button can be made available (visible on the Console toolbar) or can be hidden (removed from the Console toolbar) by using the corresponding option called "Show Redial button in Interviewer Console" found in the company Settings (Resources tab, Settings section), refer to (go to Configuring Settings Related to the Entire Company on page 461 for more information) for instructions on using this option. Check this option setting to make sure the Redial function is available or hidden from the interviewers.

If the current survey is set up in Preview or Hybrid dial mode the Redial button becomes available only after the call was connected, for surveys set up in Automatic and Predictive dial modes this button is available permanently.

Pay attention that redialling drops the current telephone connection (if such exists).

To use the Redial function

1. Click the Redial button  on the CATI Interviewer Console toolbar when the button is available.
2. This displays the Redial dialog window.

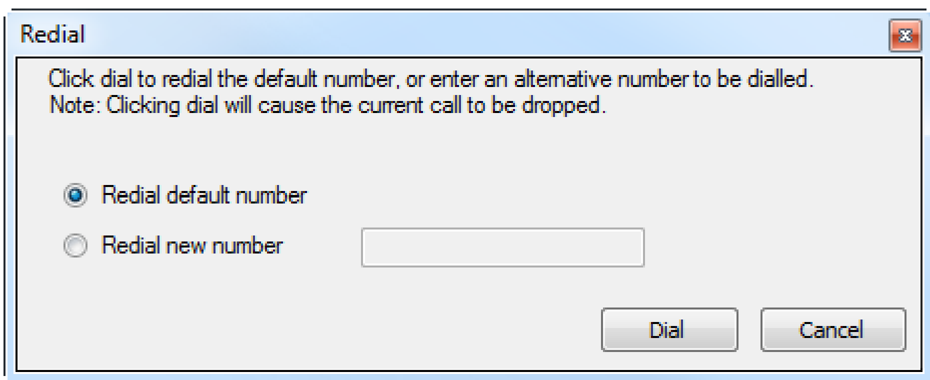


Figure 283 Using the Redial feature

3. Choose the "Redial default number" radio button to redial the current number. Choose the "Redial new number" radio button to dial an alternative number, and enter the desired phone number in the field to the right of this radio button. The phone number you enter is checked for validity - only digits are allowed in this field. The field contents are checked when the Dial button is pressed, if an unsupported symbol is found the procedure is halted and the warning icon flashes next to this field prompting you to correct the phone number.
4. After you choose the Redial option (and enter the alternative phone number if required), click the Dial button. The current telephone connection (if such exists) is then dropped. The dialog window 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 could then retry the redial procedure if required. If the call is connected successfully the dialog window closes.

   The interviewer is free to repeat the redial procedure as many times as it is required.
5. Every time an alternative phone number is dialed, it can be saved to an optional survey variable of the Open type called ‘AlternativeNumber’. The dialed alternative number is saved to this variable regardless of the call outcome. In case the ‘AlternativeNumber’ variable does not exist no alternative numbers are recorded and no error is thrown. 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. In case another alternative number was dialed for the same respondent, the previous number is overwritten with a new one.

The 'AlternativeNumber' variable can be used as CATI filter. Refer to the Confirmit Scripting Manual for more information regarding the 'AlternativeNumber' survey variable.

6.8.11. Hanging Up the Respondent Line

When the dialer is used, the interviewer can hang up the respondent line in the course of an interview. This may for example happen when the respondent suddenly refuses to continue the interview, or for some other similar reason.

This action is performed with the help of the dedicated toolbar button.

The respondent line cannot be hung up in such a way in case the interviewer performs dialing manually (when the dialer is not used). The corresponding toolbar button remains disabled until the dialer is used and an interview is commenced.

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, this only hangs up the telephone line leaving the interview active (it will neither be automatically terminated, nor any other action will follow). After the interviewer hangs up the respondent line he is free to act any way it is allowed - he can create an appointment for this respondent, he can terminate this interview himself etc.

To hang up the respondent line:

1. When the situation requires, click the Hang up the respondent line button  on the CATI Interviewer Console toolbar, or press Ctrl+H on the keyboard. CATI Console will display the confirmation message.

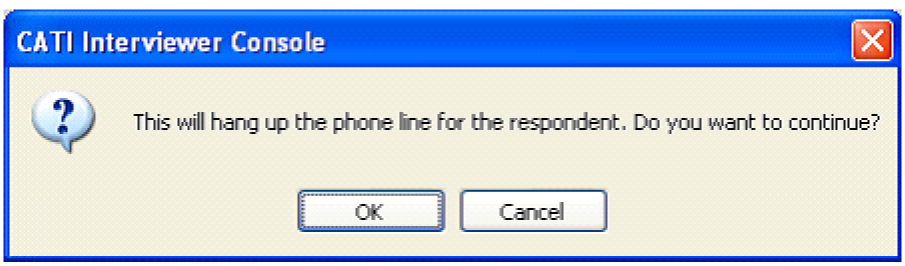


Figure 284 Confirming the respondent line hang up

Choose OK to hang up the respondent line, or choose Cancel to continue the talk.

2. Choose any applicable action after that.

6.8.12. When an Interview is Aborted due to a System Error

There may be a situation when CATI Interviewer Console aborts the interview suddenly, without any visible reason. This mostly happens due to a system error.

If a survey finishes with an error status the CATI console does not automatically submit the page. Instead CATI Console lets the interviewer know that something went wrong which stopped the interviewing process, and this is a system error, not the interviewer's. At this point CATI Interviewer Console displays the warning message in place of an interview page, like this.

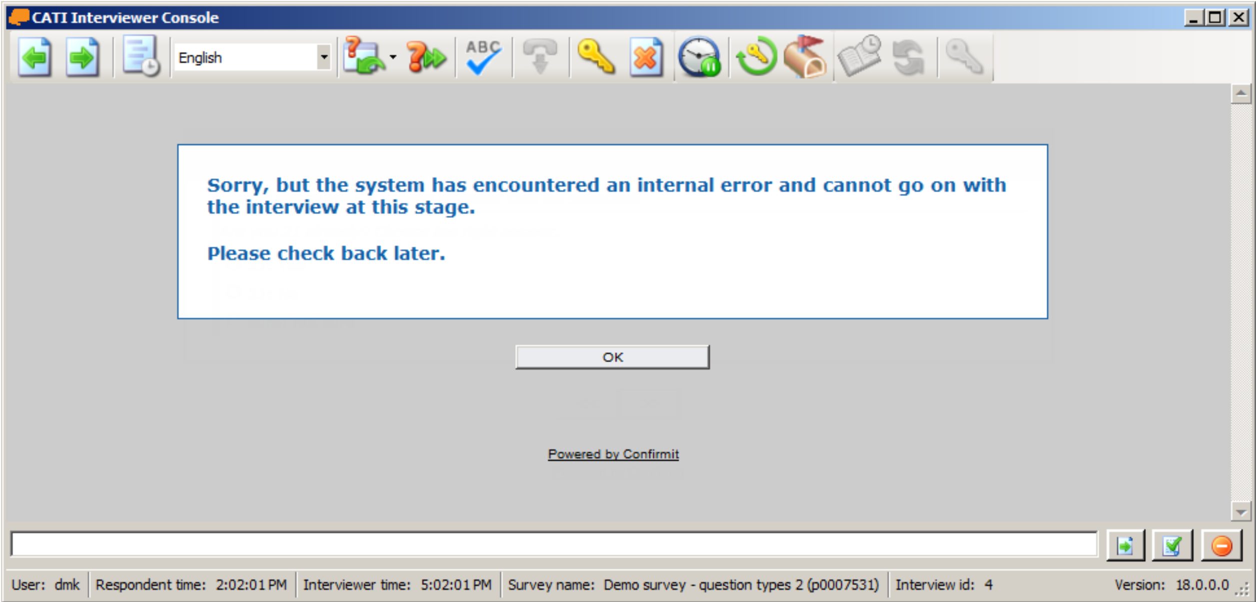


Figure 285 Error message displayed in CATI Console when a survey finishes with an error status.

The interviewer should click OK. This will take them to a new interview or to an interview selection screen depending on the task choice mode he is working in.

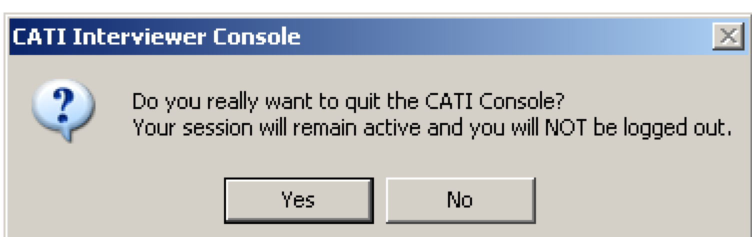
6.8.13. Terminating an Interview

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 is not assigned to anyone anymore. It will not be delivered to an interviewer until supervisor assigns it again.

A normal procedure of terminating an interview is described in the instruction below.

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 CATI Console by clicking the Close button (the standard Windows button with a cross in the top right window corner), 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 CATI Console displays the dialog box asking if you want to shut down the console. The message also warns the interviewer that he will not be logged out after the console is shut down.



Click Yes to shut down CATI Console, click No to close this dialog box and continue working in CATI Console. If you choose to shut down the application, CATI Console will display the warning message the next time you log in, and you will have to continue the terminated interview.

To terminate an interview:

1. When working with the current interview click the Terminate button  on the toolbar, or press Ctrl+X on the keyboard.
2. CATI Console displays the dialog box asking you to confirm the action.

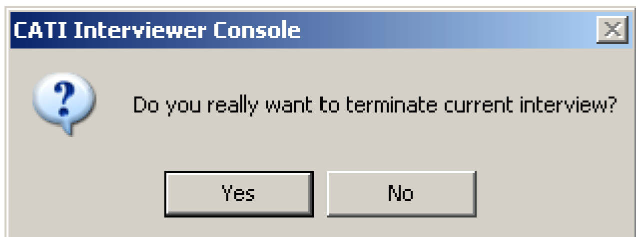


Figure 286 Warning message displayed upon intentional interview termination

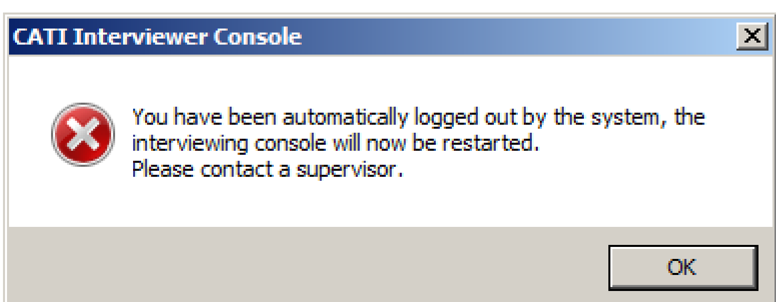
3. Click NO to close this dialog box and continue working with the interview. Click YES to terminate the current interview.
4. When the current interview is terminated, CATI Console starts the next assigned interview.

   If there are no interviews left, CATI Console displays a message suggesting waiting until the next one is assigned to the interviewer.

6.8.14. Interview Terminated by the Supervisor

The supervisor can for some reason terminate an interview in progress.

In such case the interviewer whose work has been terminated will see the following warning message.



The interviewer should click OK. This will restart the CATI Interviewer Console and the interviewer will have to log in again to work with the console.

The interviewer should then contact the supervisor to learn the reason for which the interview was terminated.

6.9. Logging Out and Closing the CATI Console Window

There are several ways the interviewer can use to log out of CATI Console.

Generally, the interviewer can log out of the CATI Console after finishing any assigned interview. Although different task choice modes assume 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.

The interviewer can use one of the two options to log out of the CATI Interviewer Console.

In any case, after the interviewer logs out of the CATI Console, it displays the “Logging out. Please wait” message in the blank work area, closes the main window, and in a while displays the Log in screen, which the Interviewer can either use to log into CATI Interviewer Console again, or close it 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 task choice mode, click the Log out after finishing the current interview button  on the toolbar, or press Ctrl+Q on the keyboard. This button (and the hot key combination) becomes available only when an interview is started and the work area displays a question.

   When the button is pressed it indicates that the delayed logout mode has been activated .

2. Finish the interview. You can also create an appointment in the course of an interview. Then, after the interview is finished, or right after the appointment is made, CATI Console will log you out of the current session.

To log out when working in the Manua task choice mode:

1. When the current interview is finished in the Manual task choice mode CATI Console displays the Survey/Interview selection pane. Click the Log out button  on the toolbar. This button becomes available only when CATI Console displays the Survey/Interview selection pane.

2. CATI Console will log you out of the current session.

To log out when no interviews are available after logging in:

1. 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 Automatic Mode, Survey Selection Mode, and Manual Selection Mode chapters for description of available logout options in this situation.

To log out after making an appointment:

1. The Appointment dialog box which appear when you choose making appointment (see Making an Appointment for details) contains an option that lets you log out of CATI Console right after you define appointment details.

   When the Log out box in the Appointment dialog is checked CATI Console will log you out after you click OK in the Appointment dialog.

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 such case CATI Console will display the warning message.

Note that CATI Console DOES NOT treat this procedure as the logout routine, and appropriately warns the interviewer that he/she will not be logged out after the application window is shut down.

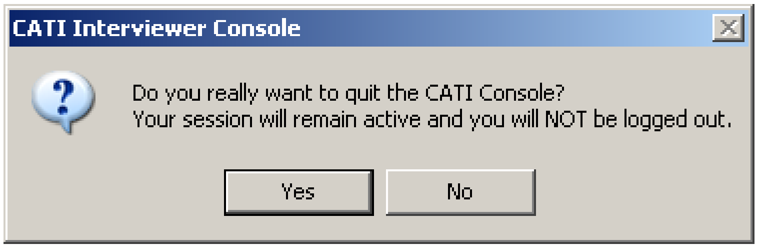


Figure 287 Warning message displayed when the interviewer shuts the CATI Console window

Pressing Yes will close the CATI Console window, and pressing No will cancel this command - the CATI Console window will remain open and the current session will continue.

In case the previous session was terminated in such a way, CATI Console will display the appropriate message when this interviewer logs in the next time - refer to (go to Selecting a Survey/Interview on page 263 for more information) for details.

7. Monitoring in the CATI Supervisor

The CATI Supervisor module provides the possibility of monitoring all kind of activities involving CATI objects. You can do this by choosing the Activity Views tab in the Navigation frame.

When chosen, the Activity Views tab displays a menu containing the list of available activity views (see the illustration below).

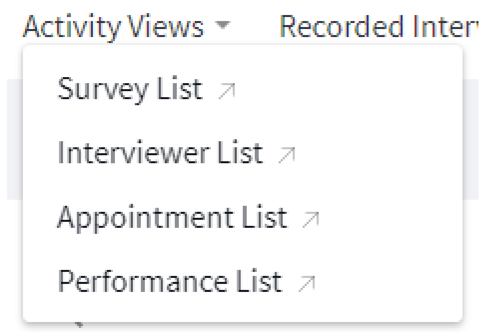


Figure 288 Displaying the list of available activity views

Activity views are displayed in separate windows when the user chooses a view.

For example, Interviewer List view allows monitoring the interviewing process for any interviewer working in the supervisor's company. The supervisor can observe interviewers' work – which interview was selected by the particular interviewer, how much time was spent on each question, other timings and statistics regarding the interviewing process. This possibility is provided only in case the CATI Monitoring Console application is installed and launched on the Supervisor's machine.

To view the Activity Views list:

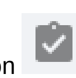
1. Click on the Activity View tab and then select the required view name in the menu that unfolds. This will reveal the selected Activity View in a separate window.

7.1. Monitoring Surveys and Survey-Related Events

To monitor surveys and survey related events supervisor has to choose the Survey List from the Activity Views object in the Navigation frame. It is then opened in the Survey List dialog window.

Note that by default the Survey List activity view shows the "Active" surveys only. These are the surveys that have at least one interviewer performing an interview currently.

To display all currently opened surveys the supervisor should 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 to Display in the Survey List Activity View on page 309 for more information).

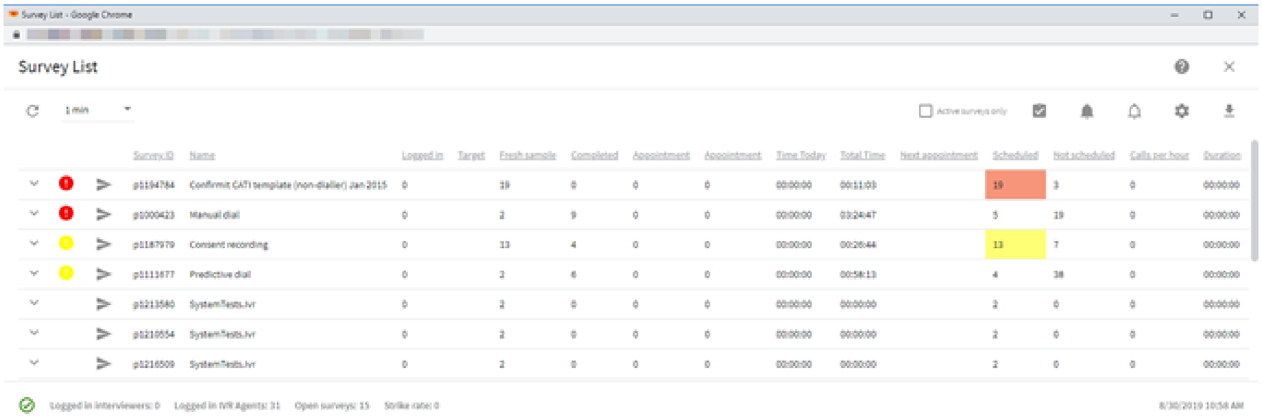


Figure 289 Activity Views - the Survey List dialog window

The Survey Activity View does not provide a context menu for a survey.

The Survey List dialog window provides the Supervisor with the following information (presented in the grid columns, left to right, starting from the 4th column):

Note that the grid may not show all the listed columns - the supervisor can configure the table contents by excluding or including selected columns into the displayed table.

- Survey ID
- Name - Survey name
- Logged in - The amount of currently logged in interviewers
- Assigned - The amount of interviewers this survey is assigned to
- Target - target number of completed interviews for the survey which is set on the General tab in the Survey list (see (go to Viewing and Modifying a Survey's General Properties on page 72 for more information))
- Fresh sample - The amount of freshly uploaded interview records (records with the extended status set to "Fresh Sample")
- Completed - The amount of interview records with the extended status set to "Completed"
- Three columns with configurable content - the user can choose the extended status for which these columns would display the statistical figure in such a column
- Time spent - Total amount of time spent since the first interview was started
- Next appointment - Next appointment time
- Scheduled - The amount of scheduled calls
- Not scheduled - The amount of not scheduled interviews
- Strike rate - the number of completed interviews per past hour
- Calls per hour - the average amount of calls performed per hour
- Duration – total amount of time spent since the survey was opened

Three leftmost grid columns are occupied by the Expand button, the alert indicator, and the Send Message button. The Expand button unfolds the list of survey calls (see for details). The alert indicator displays alerts pertaining to different survey parameters (see Setting Up Survey Alerts and Setting Up Extended Status Alertsfor details). The Send Message button allows creating and sending messages to interviewers (see Sending Messages to Interviewers for details).

The Status bar displays details regarding the amount of currently logged in interviewers, amount of currently open surveys, the strike rate, and the current date and time in the local time zone.

The Survey List dialog window also contains a toolbar with the following buttons.

Button	Description	Function
	REFRESH	Allows updating the survey list manually.
Drop-down list	REFRESH RATE	Allows specifying how often the survey list should be updated to reflect the most recent parameter values
Check box	ACTIVE SURVEYS	Allows showing only surveys that have at least one interviewer performing an interview currently while hiding all the other surveys.
	SELECT SURVEYS	Displays the survey selection form. Allows selecting surveys to display in the list in the grid.
	SET SURVEY ALERTS	Displays the survey alert form. Allows specifying alert thresholds for a survey parameter.
	SET STATUS ALERTS	Displays the status alert form. Allows specifying alert threshold for a status parameter.
	COLUMN SETTINGS	Displays dialog which helps changing the layout of the view - add or remove a certain column. See for instructions.
	EXPORT	Allows exporting currently displayed survey list.

7.1.1. Selecting Surveys to Display in the Survey List Activity View

You can choose which surveys are to be displayed in the Survey List activity view using the Survey Search form. 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 only Active or all currently opened surveys. 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 for displaying in the Survey List activity view:

1. Display the Survey List window (go to Monitoring in the CATI Supervisor on page 307 for more information).
2. By default the Survey List activity view window displays "Active" surveys only (these are surveys that have at least one interviewer performing an interview currently).

   Choose whether you want to view all the opened surveys, or view only the "Active" ones. To view all the opened surveys clear the Active Surveys box.

3. Click the **Surveys** button on the toolbar. This will display the Select Surveys dialog window.

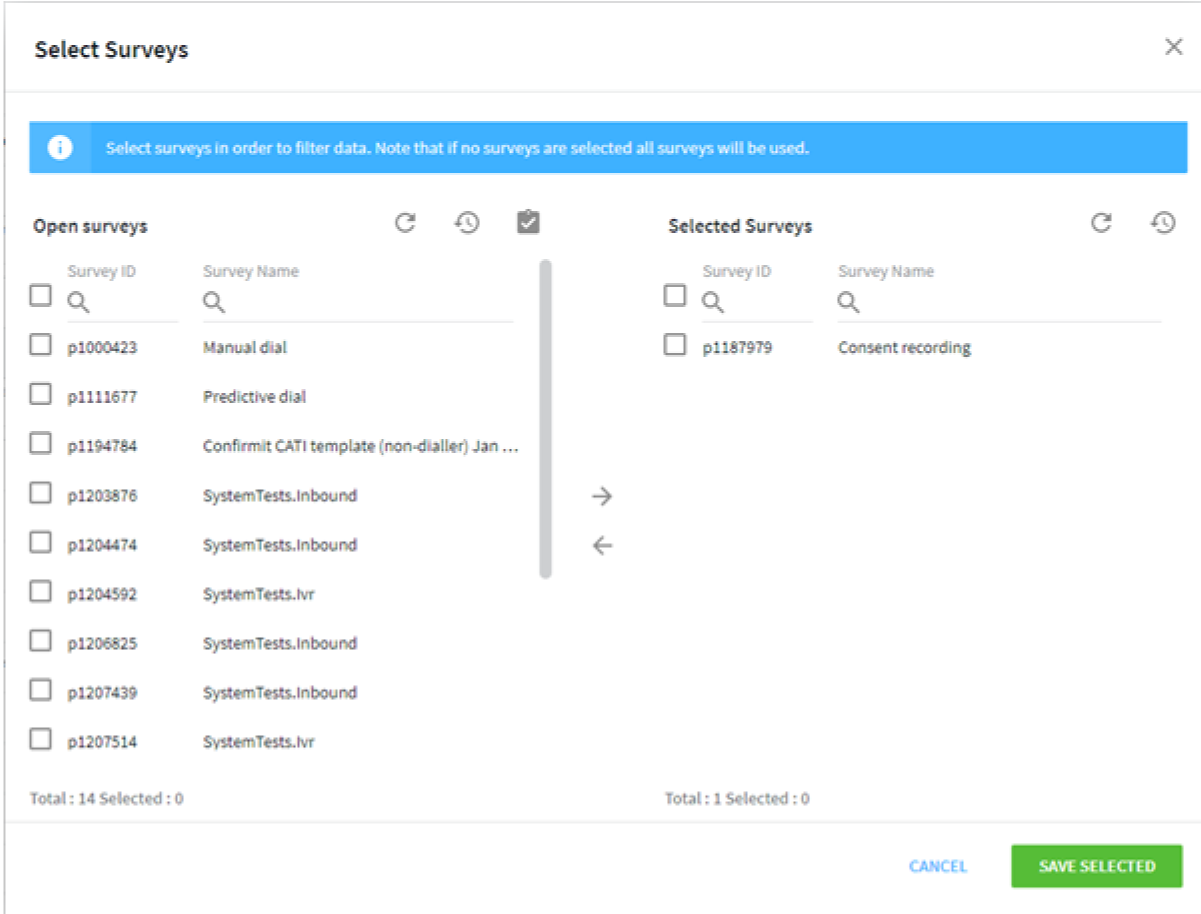


Figure 290 The Select Surveys dialog window - selecting surveys to display in the Survey List

The list of all surveys which you can select to display 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. Choose one or a number of surveys in the left pane by checking boxes next to their names. Pressing the arrow button pointing to the right will move these selected surveys to the right frame, into the list of selected surveys.

   Click the **Add open surveys** button on the toolbar to move all the open surveys at once to the list of selected surveys (into the right pane).

   To remove surveys from the list of selected surveys choose one or a number of surveys in the right pane by checking boxes next to their names. These are the surveys which are to be displayed in the Survey List, and you can hide them if you move them from the right (Selected Surveys) to the left pane (Open Surveys). After you have selected the required surveys in the right pane, click the arrow button pointing to the left to move the selected surveys to the left pane, into the list of open surveys.

5. Both panes can be configured simultaneously: check or clear boxes in both frames, click the arrow buttons. All the changes are introduced to the Survey List only after you click the **Save selected** button.

7.1.2. Configuring the Survey List Activity View

The supervisor can re-configure the Survey List to display only the information they need to see. The Column Settings dialog allows the user to choose which columns should be displayed or hidden from view. There is a possibility to include up to five columns that display call status count 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 General tab of the Survey view (go to Viewing and Modifying a Survey's General Properties on page 72 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 modal window opens.

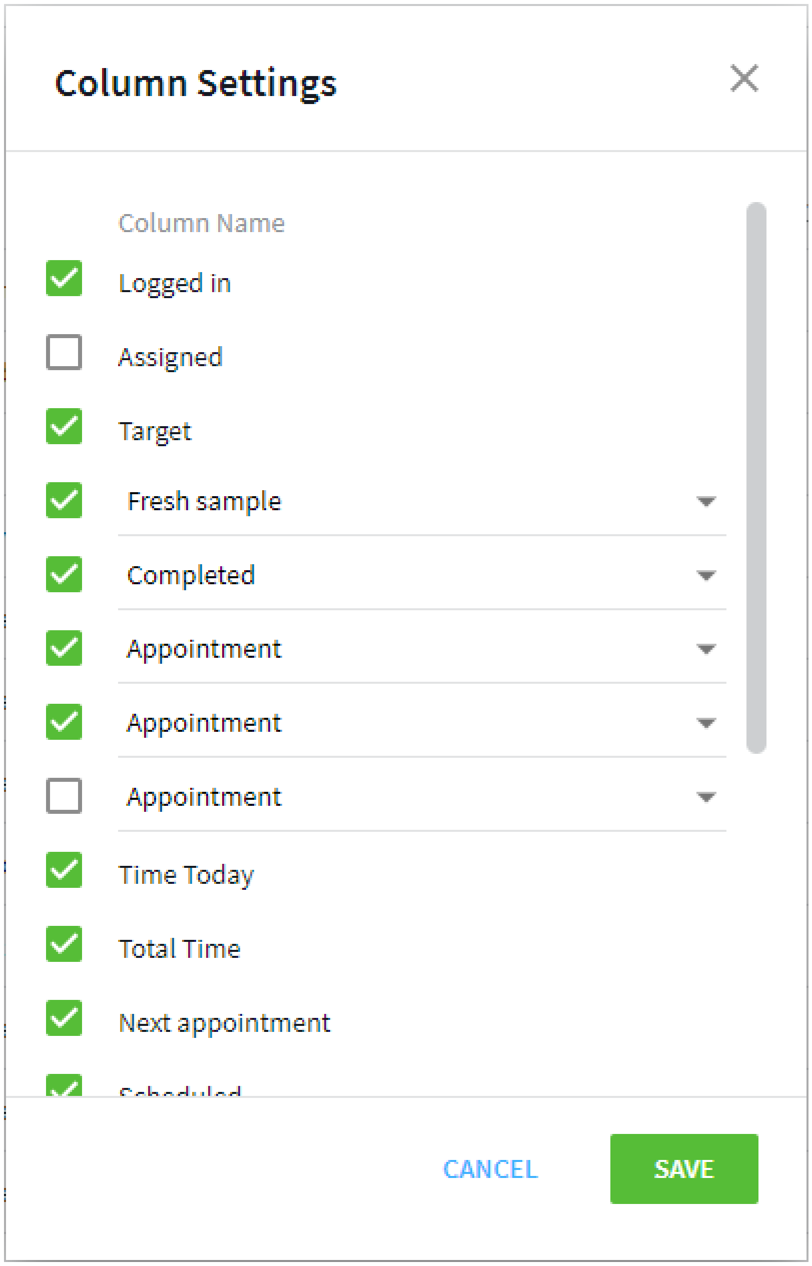


Figure 291 Configuring the Survey List Activity view

3. Tick the box in front of 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 come in two versions. One is calculated based on the last 15 minutes, and the other one is calculated hourly. This is indicated in the column names ("1h" next to the column name).

4. On completion, click **Save**.

7.1.3. Setting Up Survey Alerts

Monitoring is about watching the state of a number of survey parameters. CATI Supervisor automates the monitoring process by providing a configurable visual alert facility.

The second column contains the alert indicator. When the monitored parameter value does not approach or exceed its specified threshold, the alert indicator cell for the corresponding survey stays blank. When the parameter value reaches the specified warning threshold, the amber indicator icon appears in this column. When it reaches the specified red threshold, the icon changes to the red circle. The affected parameter cell is highlighted in the corresponding color.

CATI Supervisor automatically sorts surveys in the grid according to the alert indicator state. Surveys marked with the red indicator (value exceeded for any of the monitored parameters) are listed first, followed by surveys with the amber indicator (value reached for any of the monitored parameters). Surveys without alerts come below.

To specify alert parameters:

1. Click the **Survey Alerts** button on the window toolbar.

   The Survey Alert dialog opens.

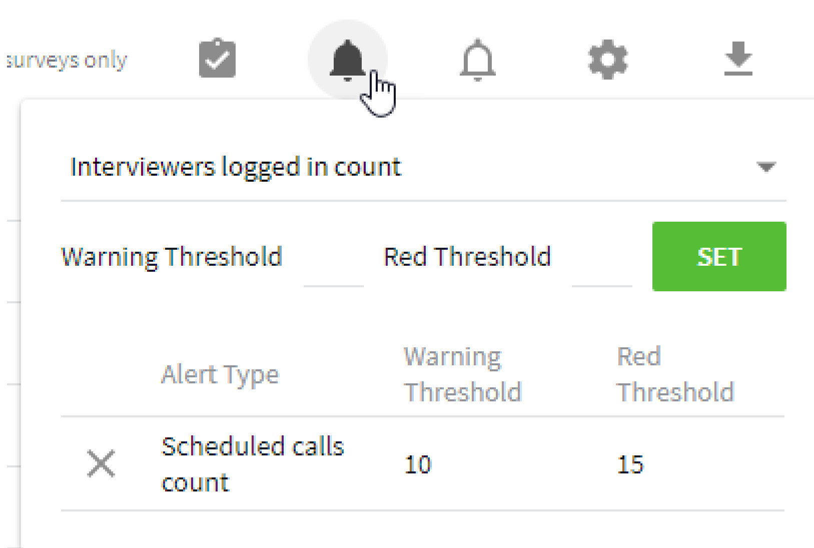


Figure 292 Setting up survey alerts

2. Choose the survey parameter to be monitored from the drop-down list. 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 will expand to show the configured alert settings in a table. The Survey List view will reflect the alert information the next time it is refreshed either automatically or manually. If any alerts are triggered, the list will display the appropriate alert icons and highlight the corresponding cells (see below).

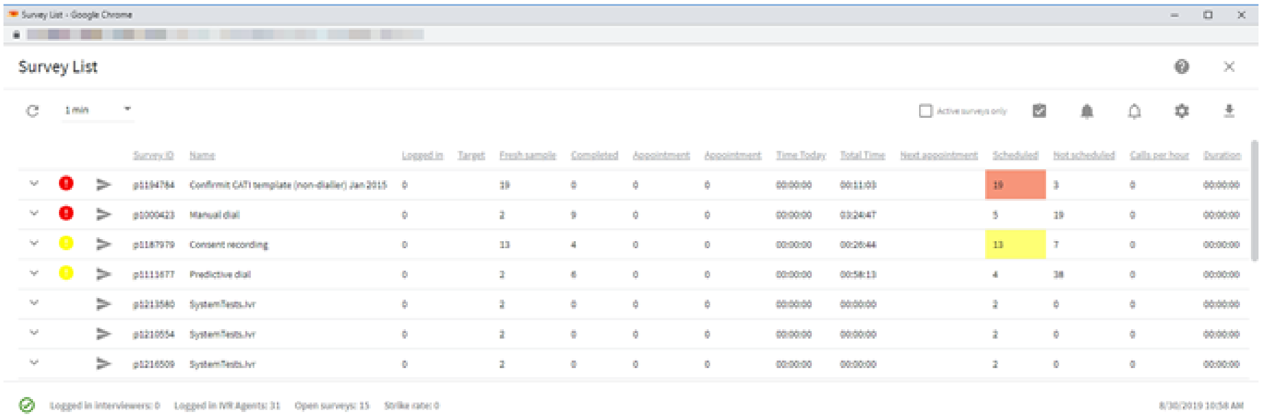


Figure 293 Survey List window displaying the configured survey alerts

5. Repeat the procedure to specify other survey alerts.

   If you need to change the alert settings, click the **Survey Alerts** button again, choose the required alert parameter in the drop-down list and then edit values in the Warning and Red Threshold fields. Then click **Set** to activate the modified alert.

   If you need to remove any alert parameter, click the **Survey Alerts** button again, then click the red cross icon next to the required alert row in the table in this form. 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 similarly to the survey alerts (go to Setting Up Survey Alerts on page 312 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.

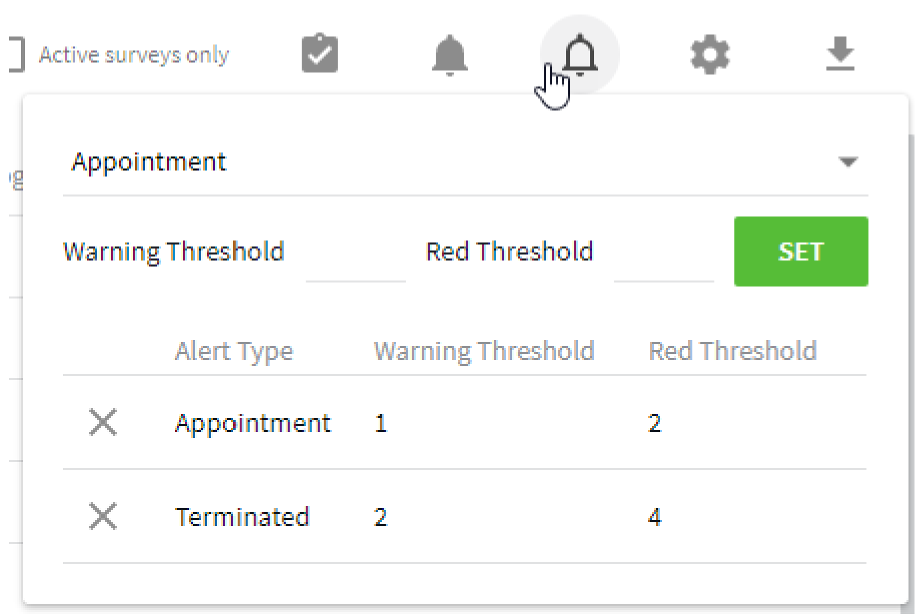


Figure 294 Setting up extended status alerts

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 will expand and show the configured alert settings in a table. The Survey List view will reflect the alert information the next time it is refreshed (either automatically or manually). If any alerts are triggered, the list will display the appropriate alert icons and highlight the corresponding cells (see the picture below).

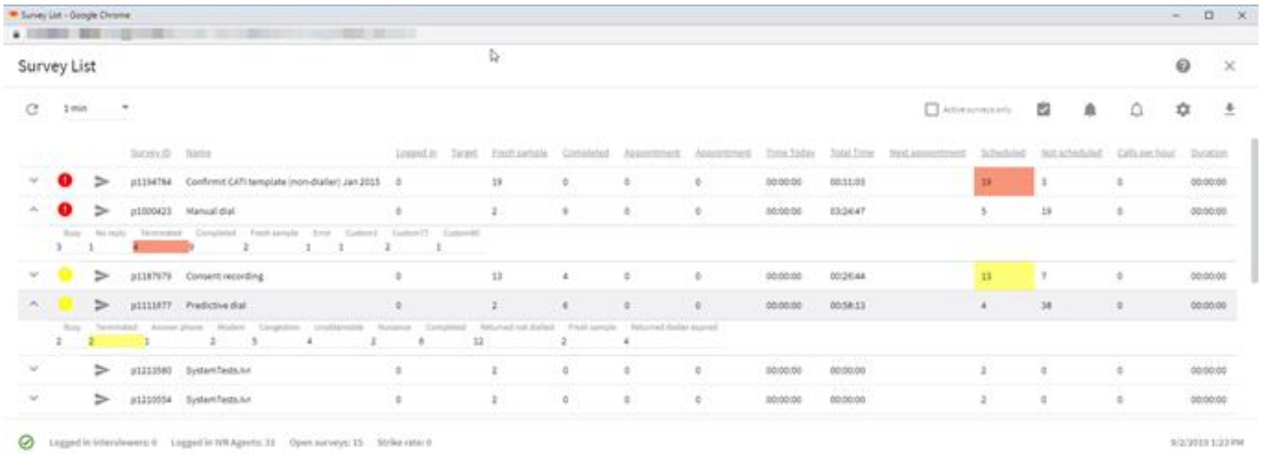


Figure 295 Setting up and monitoring extended status alerts

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 and the Supervisor must expand it if it's 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

Supervisor can instruct the CATI Supervisor to automatically update the Survey List activity view and get the latest values.

To do this you can select the required refresh period from the Refresh rate drop-down list.

By default a 1 minute refresh period is set.

Figure 296 Changing the Survey List activity view refresh rate

Alternatively you can always refresh the Survey List activity view manually by pressing 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 export the list of monitored surveys:

1. Display the Survey List activity view window (go to Monitoring Surveys and Survey-Related Events on page 307 for more information).

2. Choose surveys to include in the Survey List activity view (go to Selecting Surveys to Display in the Survey List Activity View on page 309 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 supervisor has to choose the Interviewer List from the Activity Views tab in the Navigation frame. It is then opened in the Interviewer List window.

Note that the list of virtual IVR agents is a separate list and it is not shown along with "human" interviewers' list. Supervisor can choose to view either the list of "human" interviewers or the list of virtual IVR agents. Check the "IVR Agents" box to hide the list of "human" agents and reveal the list of IVR agents. Clear this box to revert to the list of "human" agents.

The Interviewer List window shows a list of interviewers currently logged into the system - these interviewers are either working with the CATI Interviewer Console module, or on a break at the moment (go to Interviewer on a Break on page 284 for more information). Information pertaining to interviewers is displayed in rows - one row per interviewer. You can highlight a row in orange 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 himself, or when he is logged out by the system for any reason automatically (this is also the case when this interviewer's job was terminated by the supervisor), his record is completely removed from the Interviewer List.

The virtual IVR agents are supposed to be permanently logged in: when there is no interview pending they stay logged in and wait for an interview to appear. When a virtual IVR agent is logged out of the system due to a technical error, it will be

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.

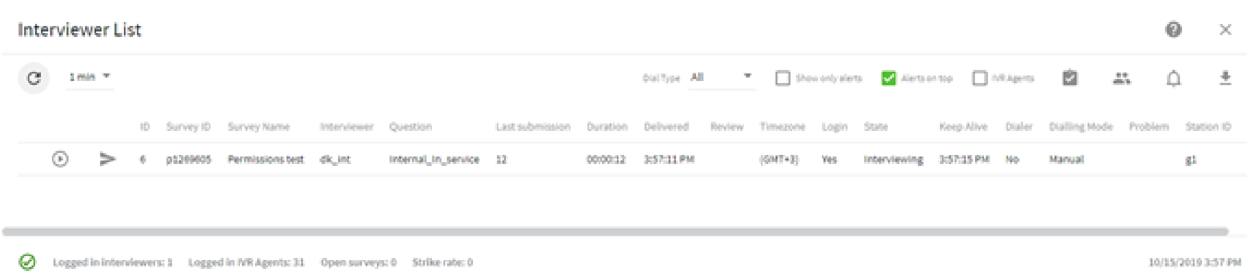


Figure 297 Activity Views - Interviewer List dialog window

The Interviewer List dialog window 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 366 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 322 for more information)
- The Monitoring Console **Start/Stop** button (changes depending on situation) (go to Monitoring Interviewer's Work in Real Time on page 325 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 333 for more information).

Alert indicators are used to indicate alerts pertaining to different interviewing parameters (go to Setting Up Interviewer Alerts on page 322 for more information).

The Monitoring Console **Start/Stop** button toggles the interviewer work monitoring (go to Monitoring Interviewer's Work in Real Time on page 325 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 Interviewer's Work in Real Time on page 325 for more information).

The **Send Message** button allows creating and sending messages to interviewers (go to Sending Messages to Interviewers on page 330 for more information).

The Interviewer List dialog window also contains a toolbar with the following buttons.

Button	Function	Description
	SELECT SURVEYS	Displays the Select Surveys dialog window. 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 window. 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 367 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 Grid in the Interviewer List Window

Supervisor can choose surveys for which the list of assigned interviewers should be displayed in the grid. This can be done with the help of the Survey Search form using which the supervisor can search for surveys by their names, or can apply a filter to the survey list.

Note that when no surveys are selected all surveys will be used.

To select surveys to display in the interviewer list:

1. Click the Surveys button on the toolbar.

   This will display the Select Surveys dialog window. Click the Select button to display the Select Surveys dialog window (see description of this dialog here - Selecting Surveys to Display in the Survey List Activity View).

2. Click Save selected in this dialog window when you are done selecting surveys. This will refresh the interviewer list in the Interviewer List dialog window, leaving only interviewers assigned to the selected surveys and hiding all other interviewers.

7.2.2. Selecting Interviewers to be Included in the View

Supervisor can choose interviewers to be included in the Interviewer Activity View. This can be done with the help of the Survey Search form. The supervisor can use it to search for interviewers by their names.

Note that when no interviewers are selected all interviewers working for the current company will be included into the View.

To select interviewers to display in the interviewer list:

1. Click the Interviewers button  on the toolbar.

   This will display the Select Interviewers/Groups modal window.

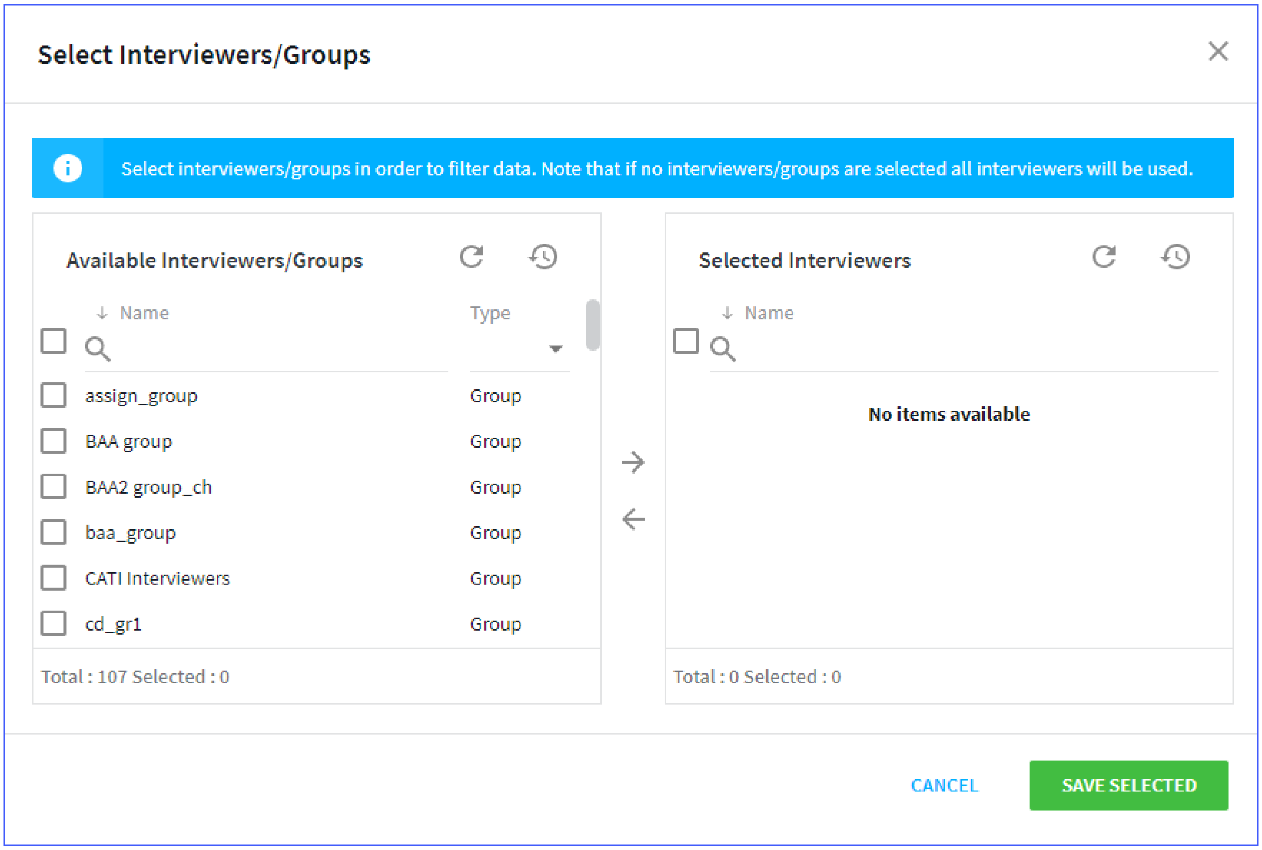


Figure 298 Selecting interviewers to display in the Interviewer List activity View

   Refer to (go to Selecting interviewers or interviewer groups on page 408 for more information) for description of this dialog.

2. Click **Save selected** when you are done selecting interviewers.

7.2.3. Monitoring Interviewer Performance

You can view the list of interviewers who have worked today in the Interviewer Console and conducted at least one interview during the current day. The Interviewer performance activity view is presented as a grid in a separate window.

The interviewer Performance list shows all interviews performed by each interviewer that has worked logged into the Interviewer Console.

Statistics for each interviewer are shown in a separate row. Each row contains the following data:

- Interviewer - the interviewer name;
- Interviewing time - cumulative total, shows the total time spent performing all interviews during all sessions that were held by the interviewer today (during the current calendar day, as defined by the applied local time setting under Resources/Active Timezones). This time does not include the break time (see (go to Interviewer on a Break on page 284 for more information));

- Interviews - the total number of interviews performed by the interviewer today (during the current calendar day);
- Completes - the total number of interviews completed by the interviewer today (during the current calendar day);
- Strike rate (last hour) - the number of interviews completed by the interviewer during the past hour (see explanation regarding the counter refresh time and the "past hour" below);
- Strike rate (average) - the average number of completed interviews per hour for 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 completed interview number 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 each 3 minutes. 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 (see (go to Monitoring in the CATI Supervisor on page 307 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.

   This will display the interviewer Performance List.

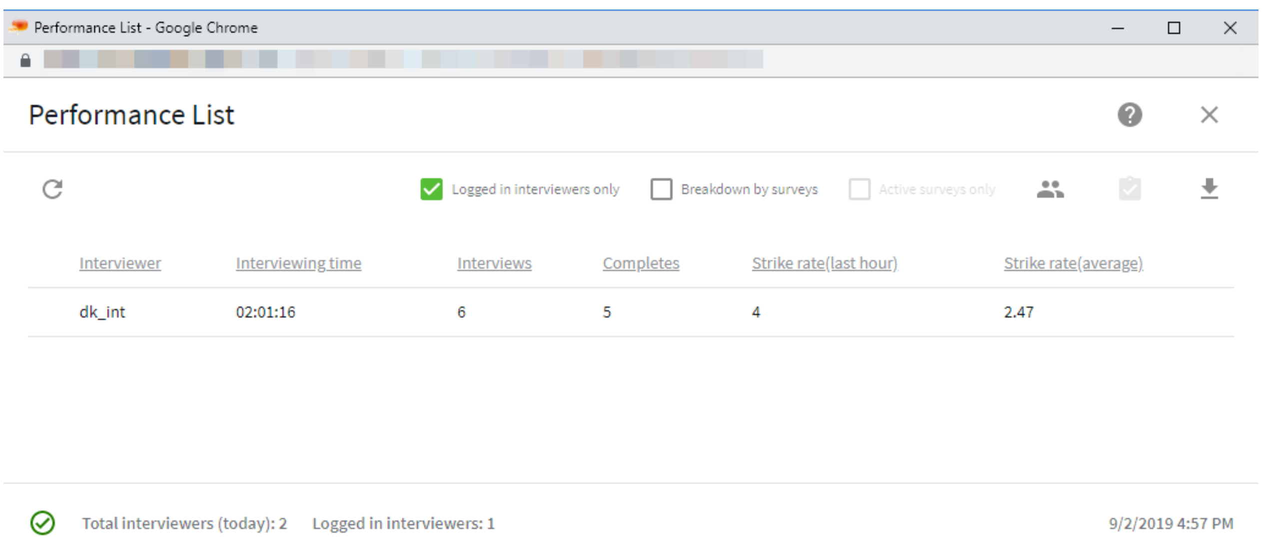


Figure 299 Viewing the Interviewer Performance list

   The Performance view by default lists all interviewers who are currently logged into the Interviewer Console and working on a survey. Unchecking the "Active surveys only" box (see step 5 below) will reveal productivity information for all surveys worked on today.

2. You can display the list of all interviewers who have worked today in the Interviewer Console and conducted at least one interview. To do this clear the Logged in interviewers only box. Make sure the Breakdown by surveys box is cleared, too.

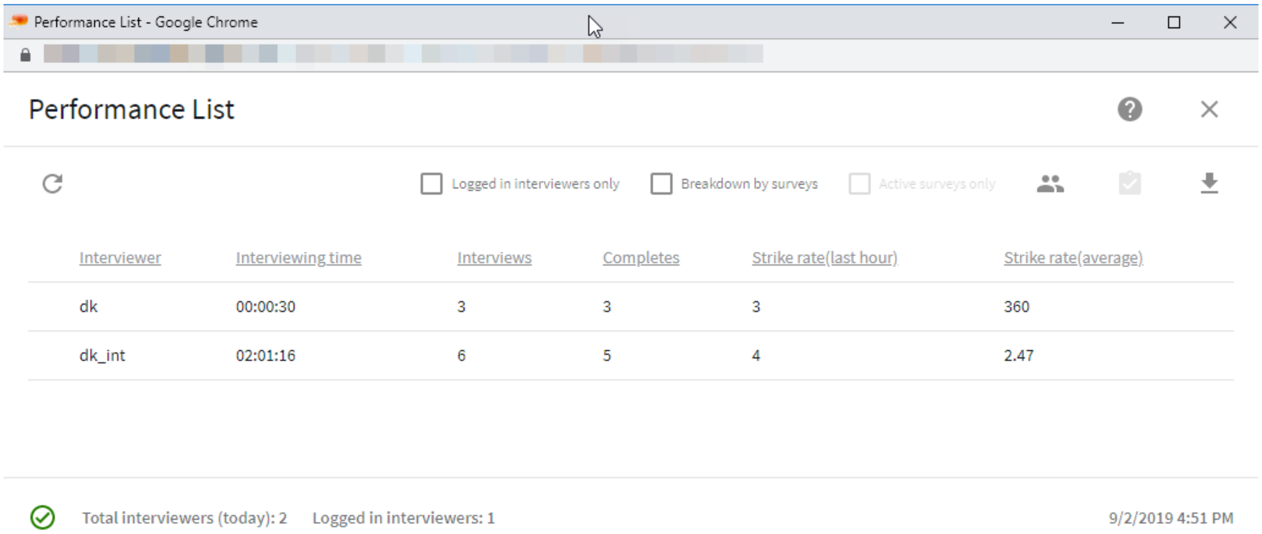


Figure 300 Viewing the Performance list for all interviewers who have worked today

3. You can choose which interviewers to include in this list. Click the Interviewers button to display the Select Interviewers window.

   Refer to (go to Selecting interviewers or interviewer groups on page 408 for more information) to

   This dialog window assumes the same user technique as it is used to make a choice in the Select Surveys dialog window (see Selecting Surveys to Display in the Survey List Activity View. Click the Save selected button in this dialog window to save this setting.

4. You can view the list of interviewers broken down by surveys they worked with during the day. To do this check the Breakdown by surveys box. An example of this view is shown below.

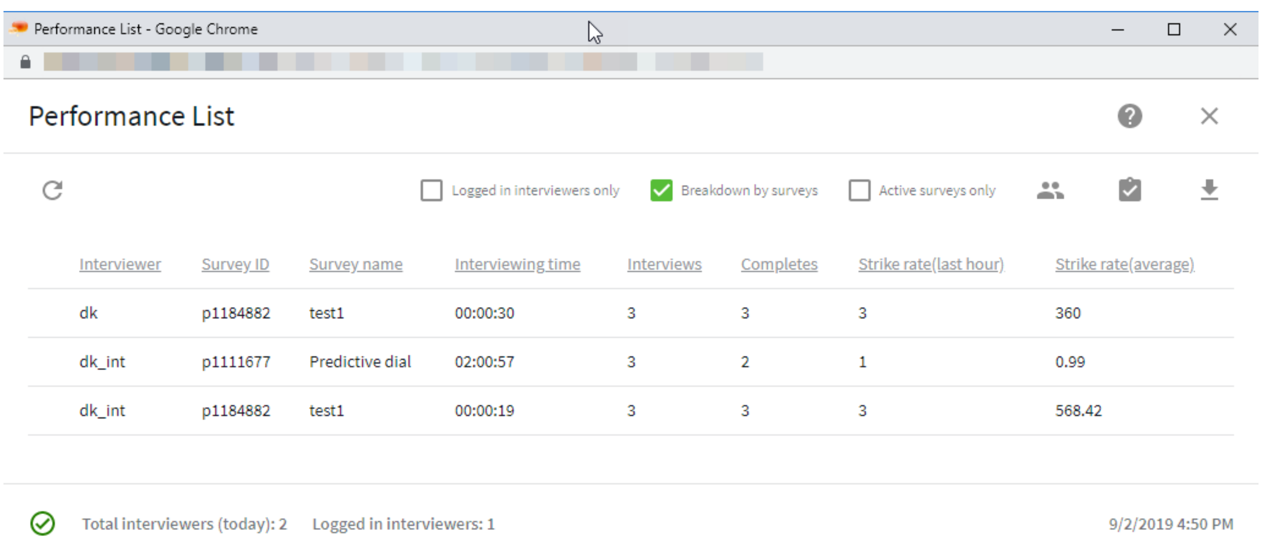


Figure 301 Interviewer performance list broken down by surveys

5. When the Performance List shows information regarding interviewers broken down by surveys, the Surveys button becomes available. It means that you can additionally filter this view by opened surveys (surveys which are currently in the Opened state).

   To filter the view by opened surveys click the Surveys button. This will display the Select Surveys dialog window (see (go to Selecting Surveys to Display in the Survey List Activity View on page for more information)). There is an extra "Add open surveys" button in this dialog window which lets adding all opened surveys at once. Click it to move all opened surveys from the left to the right frame.

6. The survey breakdown view can additionally be filtered by the currently active surveys. This view will show only surveys which interviewers work with at the moment.

   To display this view you should first check the Breakdown by surveys box, and then check the Active surveys only box which becomes active only when the Breakdown by surveys option is enabled.

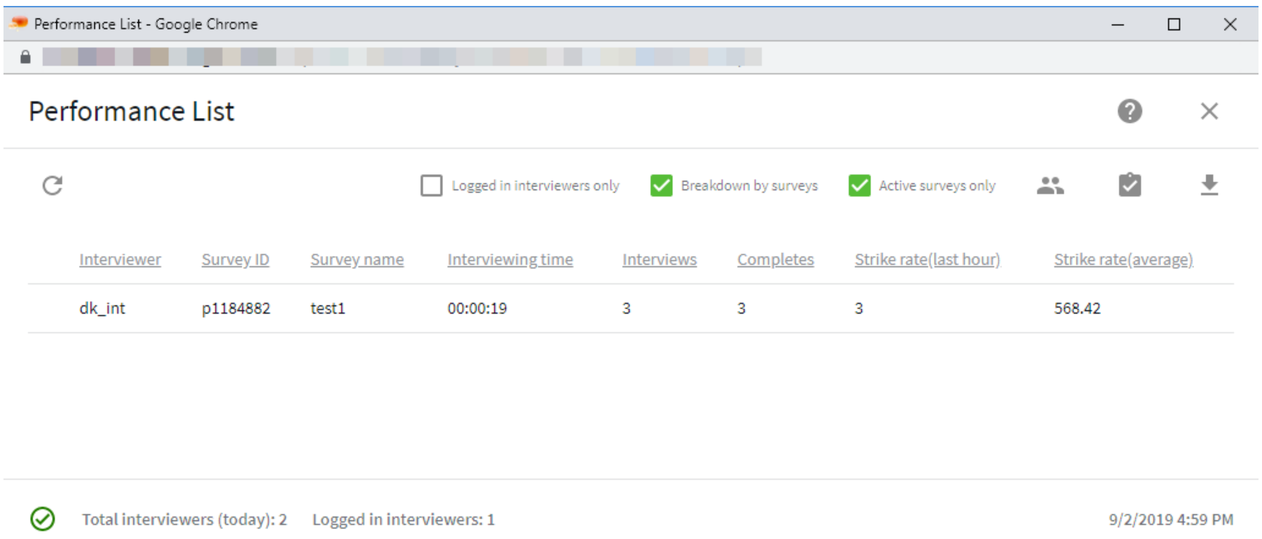


Figure 302 Interviewer performance list broken down by active surveys

7. You can refresh the view manually at any time by pressing the Refresh button above the grid.

8. You can export the Performance list in MS Excel format. The exported list retains the structure of the grid displayed in the Interviewer Performance window and also includes a line showing the date when the list was exported. Exported list will include only interviewers that were listed at the moment 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 MS Excel application.

   The name of the file containing the exported Performance list includes the name of the activity view and the timestamp.

9. The status bar in the Performance 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 (see (go to Setting the Selected Active Timezone as Local on page 401 for more information) for explanation).

7.2.4. Setting Up Interviewer Alerts

You can set up alerts that visually indicate if a parameter pertaining to an interviewer reaches or exceeds a critical value. The left grid column contains the alert indicator which shows whether an interviewer parameter has reached or exceeded a critical value. Specify the parameter thresholds using the Alert form.

Normally, when the parameter value does not exceed the specified threshold, no alert indicator is displayed in the grid.

When the parameter value exceeds the specified warning threshold, the indicator cell displays the triangle icon, and when it exceeds the specified red threshold, the icon changes to a red crossed circle. The affected parameter cell is then highlighted in the corresponding color – amber (warning threshold exceeded), or red (critical threshold exceeded).

Check the "Alerts on top" box to sort interviewers in the grid according to the alert indicator state – interviewers marked with the red indicator (critical value exceeded for any of the monitored parameters) come first, then come interviewers with the amber indicator (warning value is exceeded for any of the monitored parameters), then comes the rest of the interviewers (parameters are within warning threshold boundary).

You can also hide interviewers whose parameters haven't reached the warning threshold whilst displaying only those with the warning and red threshold value reached. To do so check the "Show alerts only" box.

To specify alert parameters:

1. Click the Alerts button on the toolbar.

   This will display the **Alert** form below the button. The picture below shows the Alert form with already configured alert values and illustrates possible alert situation.

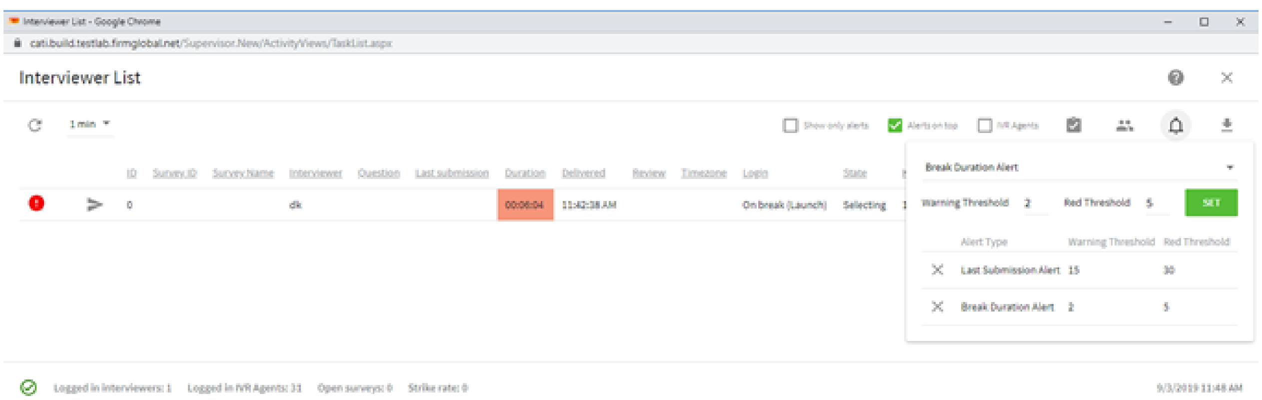


Figure 303 Setting up interviewer alerts. Red alert is displayed.

2. Choose the interviewer parameter to monitor from the drop-down list. This list includes parameters displayed in the grid columns.
3. Enter the Warning and the Red (critical) threshold values in the fields below.
4. Click Set to activate the specified threshold.
5. Repeat the procedure to specify threshold values for other parameters. Each configured alert is added to the grid as a row.
6. Each grid row corresponding to a single alert displays the current Warning (amber) and Red threshold values.

   An icon to the left of the alert name deletes these values and removes the alert.

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 (see (go to Monitoring Interviewers and their Work on page 315 for more information) for details).
2. Set the required survey filter (see (go to Selecting Surveys to Display in the Grid in the Interviewer List Window on page 317 for more information) for instructions).
3. When the Interviewer List window shows information for the required interviewers click the **Export** button on the window toolbar.

   This will display the standard browser dialog box prompting you to choose what to do with the exported list.
4. Click the **Save** button in this dialog box.

   This will display the standard Windows Save As dialog box.
5. Enter the file name and path to save the file, and click the **Save** button.

   The list of monitored interviewers is then saved to a file 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 should 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 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 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.

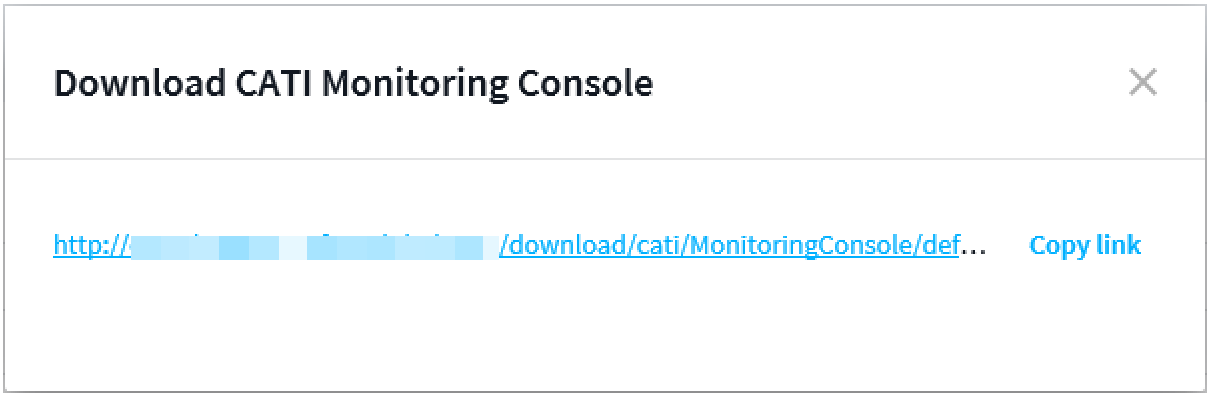


Figure 304 Fetching CATI Monitoring Console download URL

2. Either choose the URL suggested in the dialog window, or copy this URL into your clipboard by choosing the "Copy link" command and then paste it into browser address bar.
3. The download page opened in the browser will look like this.

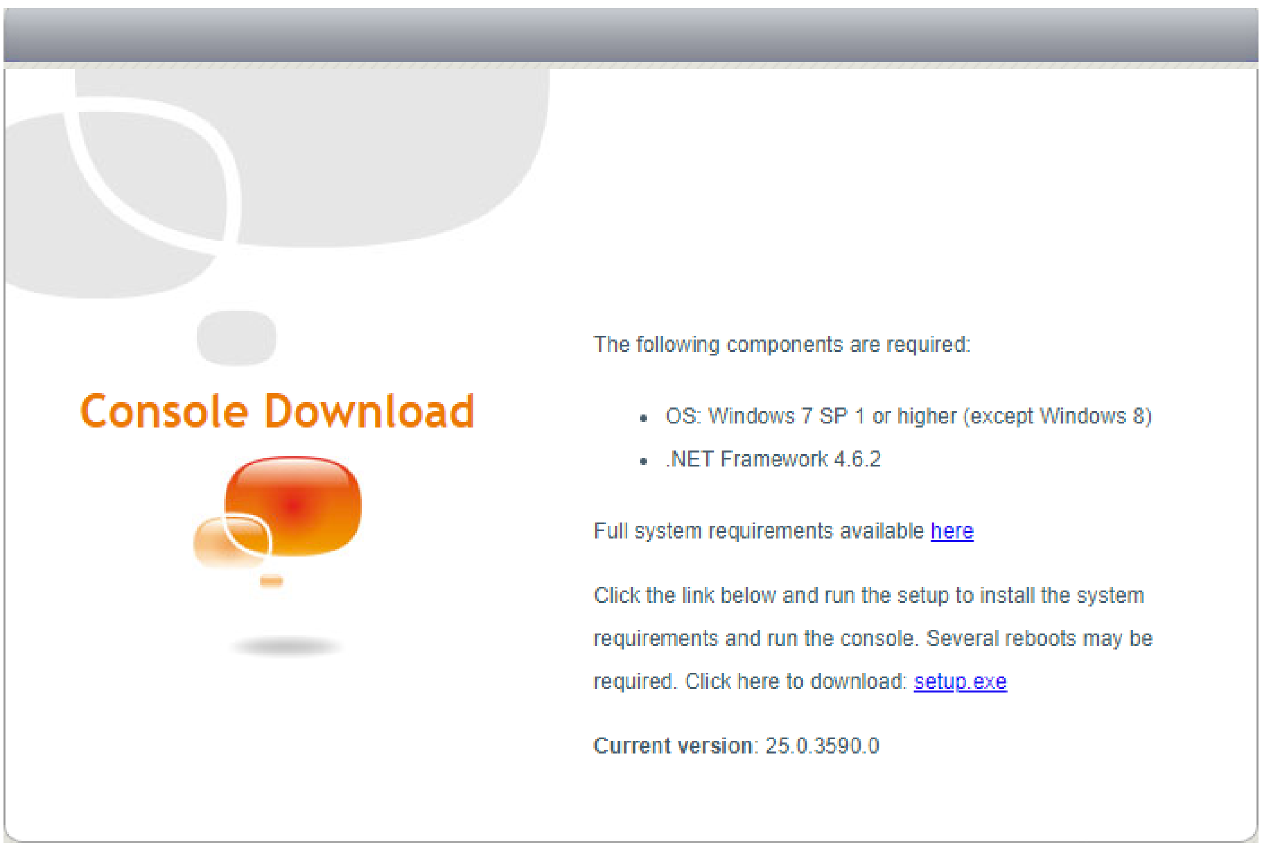


Figure 305 CATI Monitoring Console download page

4. Click the download link and follow the instructions to download the file.

In case prerequisites (other than OS) mentioned in the dialog window 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 Monitoring Console installation refer to Installing a New Copy of CATI Monitoring Console.

   The CATI Monitoring Console upgrade procedure is described in Upgrading CATI Monitoring Console.

7.2.6.1. Installing a New Copy of CATI Monitoring Console

To install 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 (see Downloading the CATI Monitoring Console Installation Files for details).

   The dialog window with the progress bar showing the installation progress 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 anywhere on the Desktop, in the System Tray etc. The CATI Monitoring Console utility is run automatically when required. The dialog window displayed on successful Console installation provides a note regarding the way the Console could be run:

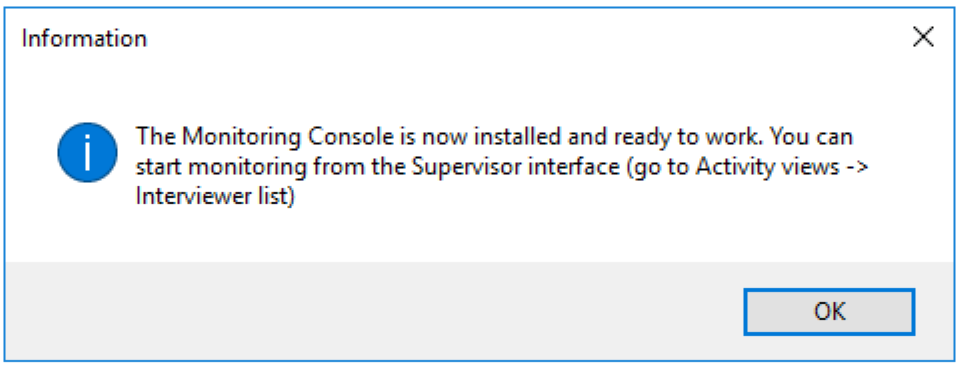


Figure 306 The dialog window

You can check if the CATI Monitoring Console is installed by browsing the Uninstall or Change Program list. To display this list, choose the Programs and Features group in the Windows Control Panel menu.

7.2.6.2. Upgrading CATI Monitoring Console

CATI Console will be 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 the CATI Monitoring Console Aapplication

In the event 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 **Confirmit CATI Monitoring Console** application and choose to uninstall it.

   Follow the instructions provided and complete the procedure.

7.2.7. Monitoring Interviewer's Work in Real Time

The CATI Supervisor module allows for live monitoring of the interviewing process.

To monitor the interviewer's work in real time the supervisor should install and launch the CATI Monitoring Console application. Refer to Downloading the CATI Monitoring Console Installation Files for description of the CATI Monitoring Console application download and installation procedures.

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.

Supervisor can observe which particular interview is being conducted by the particular interviewer, and monitor all actions that interviewer performs working in the CATI Interviewer Console application. Supervisor can also terminate an interview from the Interviewer activity List. See instructions below on how to start and stop monitoring the interviewer's work using the CATI Monitoring Console.

Legislation in some countries prohibits live monitoring of respondent's answers until they provide their explicit consent for such live monitoring. To comply with these rules the Confirmit Horizons software provides means of disabling and enabling of the interview live monitoring and recording functions.

Live and deferred monitoring can be enabled/disabled with the use of:

- controls provided on the CATI Options tab of the Survey Settings view (the Survey Management menu in the Confirmit Authoring module);
- two scripting functions which can be added to a questionnaire tree (in the Survey Designer).

The "Monitoring and recording options" section on the CATI Options tab (in the Survey Settings section) provides controls which either allow live interview monitoring and/or screen recording from interview start (options selected by default) or prohibit such activity until the interview reaches a point starting from which live monitoring and/or screen recording is allowed. Such point is specified by a relevant function which is added to the questionnaire tree. Until this point in the interview is reached no monitoring/recording activity is possible. Refer to corresponding topics of the Confirmit Authoring module documentation and of the Scripting manual to learn more about enabling the Monitoring and recording options and using relevant scripting functions in the questionnaire tree.

When live monitoring is allowed the supervisor can monitor all actions that interviewers perform working in the CATI Interviewer Console application. The monitoring user can see which particular interview is being conducted by the interviewer, currently answered interview questions, answer options selected by the interviewer, the amount of time spent and other interviewing parameters. He/she can also listen to the conversation held between the interviewer and respondent in the course of the monitored interview.

Live monitoring cannot be prohibited once it is allowed for any given interview - this interview is available for monitoring/recording until it finishes with some status.

The monitoring console grid is refreshed in increments of 15 seconds. Values in the Interviewer List grid cells change each 15 seconds.

The supervisor can set up alerts for any parameter that is displayed in the grid in the Interviewer List dialog window.

The supervisor can terminate the current interview if this is required.

The supervisor is also able to perform deferred monitoring of the interviewers' work. This means that he/she can enable the "Recording" option in the Confirmit Authoring (the one mentioned above) and all interviews will be recorded and saved both as video and audio tracks from the point it is allowed in the questionnaire logic by a relevant function. Recorded interviews will then be available for viewing and listening on demand for a fixed period of time (go to Deferred Monitoring in CATI Supervisor on page 334 for more information)

It is possible to perform live and deferred monitoring simultaneously. This means that any interview can be monitored in the real time (live monitoring) with the deferred monitoring option enabled (so that it could be saved for viewing at a later time).

To start and stop monitoring the interviewer:

1. Choose the Interviewer List from the Activity Views menu. This will display the Interviewer List view. The picture below shows that there is one interviewer who is currently logged in and live monitoring can be started for this interviewer.

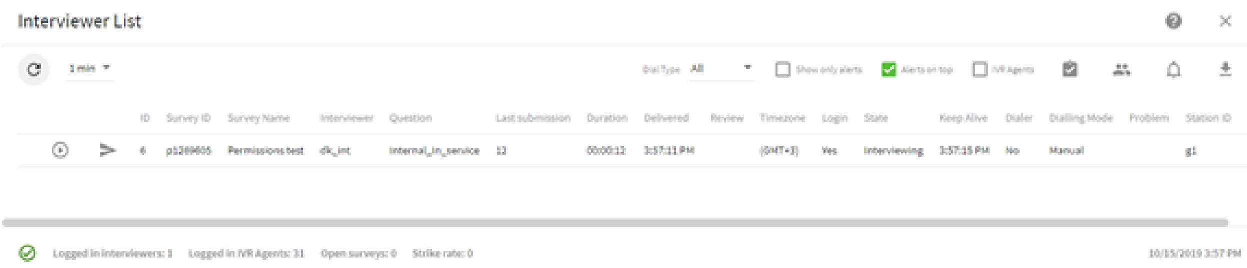


Figure 307 The Interviewer List activity view shows that an interviewer is logged in and live monitoring can be started for this person

2. In the Interviewer List view among currently logged in persons choose the interviewer you want to monitor and click the Start monitoring console button in this row. This will display a dialog asking you to confirm the action.

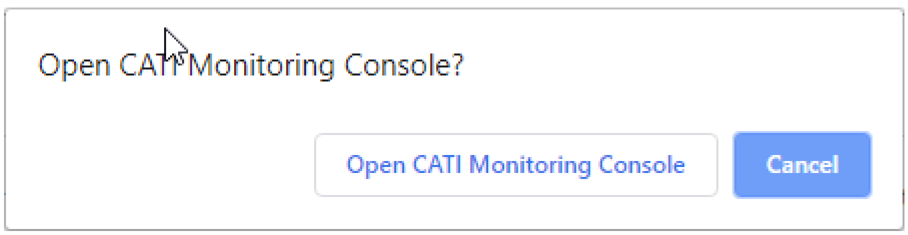


Figure 308 A prompt displayed upon Monitoring Console start

Click the Open CATI Monitoring Console button. Monitoring is started and the Start monitoring console button in the Interviewer Activity view grid for the relevant interviewer turns into the Stop monitoring button .

When live monitoring is prohibited for the interview, the button turns into a warning icon . When this is the case, the supervisor cannot monitor the current interview until the point in the interview logic is reached which allows to start live monitoring. At this point the button becomes available.

3. The picture below shows that the interviewer is already being monitored (the Start monitoring button has been replaced by the Stop monitoring button).

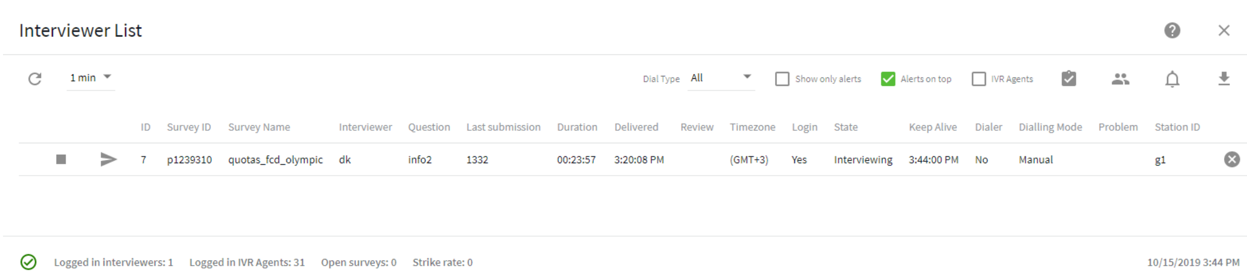


Figure 309 The Interviewer List activity view shows that an interviewer is currently being monitored

4. When the Start monitoring button is pressed the Monitoring dialog is displayed. Live monitoring also can include listening to the conversation held by the interviewer and the respondent in the course of an interview. This dialog window appears and this feature becomes available only if the Dialer in the system is currently in the "available and operational" mode. The supervisor can listen to the interview audio only if they supply the telephone number in the dialog shown below.

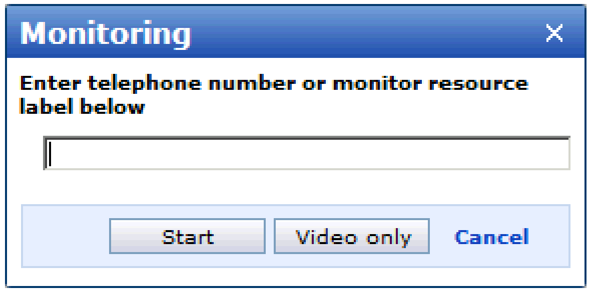


Figure 310 Choosing the monitoring option - with or without listening

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 submit this number to the dialer again or edit it before submitting.

Click "Start" to perform live monitoring of the Interviewer's console screen and simultaneously listen to the interview audio.

If you are not going to listen to the conversation, leave the Telephone Number field blank and click the "Only video" button.

Pressing Cancel will close this dialog window and cancel live monitoring.

5. Pressing the "Start" or "Video only" button opens the Monitoring Console.

   This window displays almost the same picture as on the interviewer's screen - it shows the contents of the CATI Interviewer Console application window (see the illustration below).

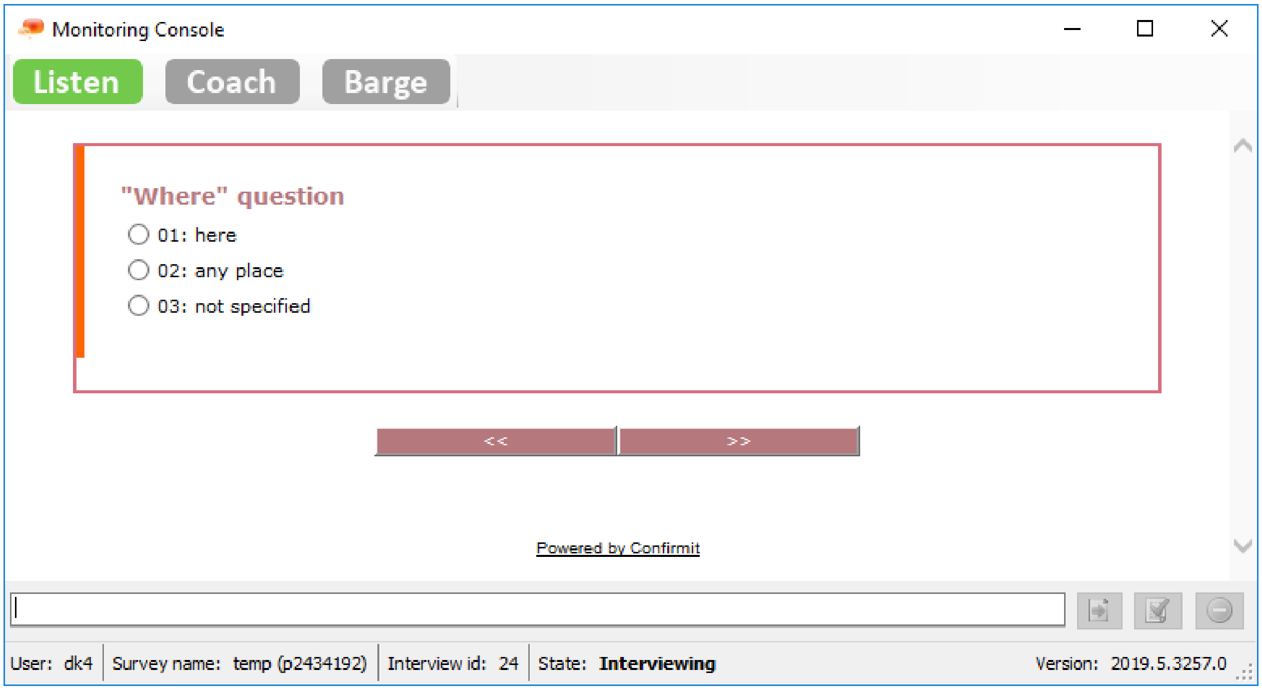


Figure 311 The Monitoring Console window displaying the monitored interview

The status bar of the Monitoring Console window 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 an extra 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 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 turn on 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 make the interviewer 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.

Each interactive mode can be switched on and off but only one mode can be active at any given moment so 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 blank screen and displays the notification message in the status bar for the supervisor to see (refer to the illustration below).

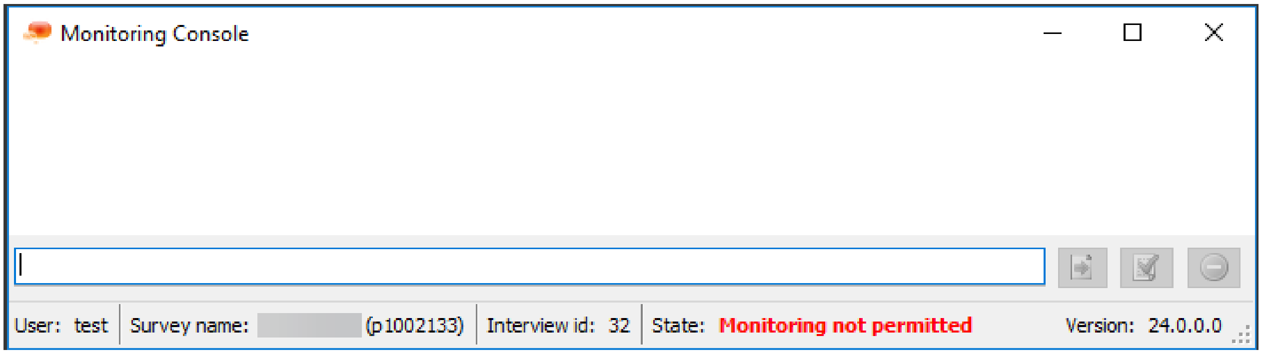


Figure 312 Monitoring console with blank screen and a warning message appears when live monitoring is prohibited

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).

The supervisor should be aware that if monitoring was triggered with the use of the special function after it was enocuntered in the questionnaire tree any attempt to return to a previous question (asked before the monitoring consent was allowed) will be successful. Please be careful when stepping back in the interview questions in such a situation.

Note that audio is also not available for interviews (or parts of interviews) which have live monitoring activity disallowed.

7.2.8. Sending Messages to Interviewers

You can inform interviewers belonging to your company by sending instant messages to them. Messages are delivered to the interviewers with the help of the CATI Interviewer Console. It means that those who are currently logged in and working with the CATI Interviewer Console will be able to receive and access these messages, while those who are not currently logged in can only receive these messages after they log in and start working with CATI console (but only in case the Supervisor has chosen the option for sending messages to all interviewers, including those who are not logged in).

Supervisor can send a message either to certain interviewers, or to an interviewer group working with a certain survey. Messages can be sent in the following situations:

- From the Interviewers tab - to the selected interviewers, or to 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 and from the Interviewers List activity view) can be delivered even in if the interviewer is not logged into the Interviewers Console, or if he/she is logged in but is not currently conducting an interview (in the Selecting, or On a Break states). When you are sending a message to particular interviewers (from the Interviewers tab, or from the Interviewer List activity view) you can choose whether you would like the message 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 261 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.

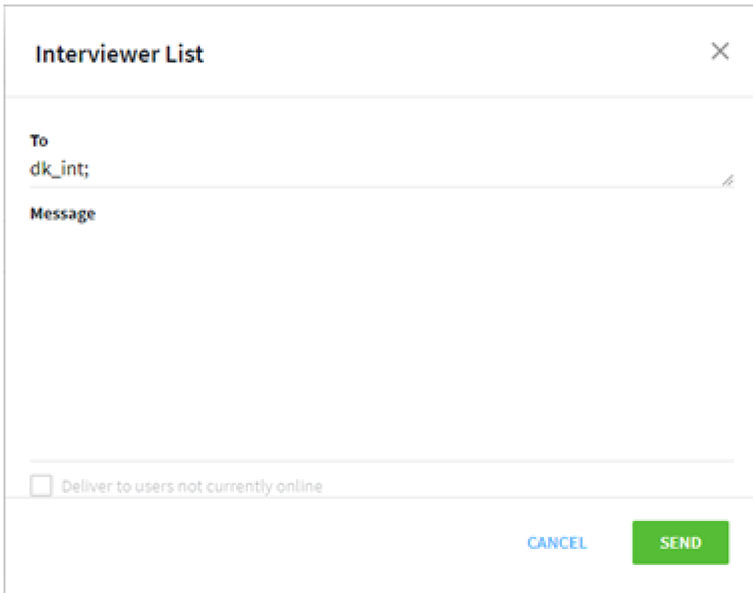


Figure 313 Sending message to interviewers

   Selected recipient names will be 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 window and then repeat steps 1 through 3, this time selecting only items you need.

   The **Deliver to users not currently online** checkbox allow you to send the message to the interviewers who are not currently logged in. They will be informed about the message when they next log in to work with the CATI Interviewer console. Check this box to enable the option.

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.

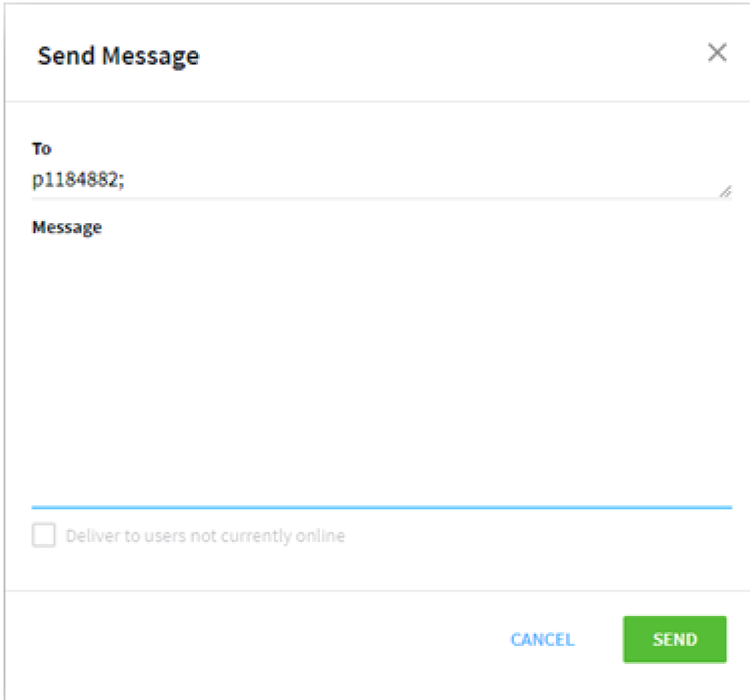


Figure 314 Sending message to interviewers assigned to the selected survey

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 window (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 315 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 window (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 307 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. Terminating an Interview and Forcing the Interviewer to be Logged Out

In certain situations the supervisor can cancel any interview that is currently in progress. This means that the interview will be aborted in a short while after the command is chosen, and then the interviewer will be logged out forcibly. Note that a certain short lag can be expected between the moment the command is chosen and the moment the interview is canceled - the interviewer may even proceed to another question during that time.

CATI Supervisor will prompt you by displaying the following warning message.

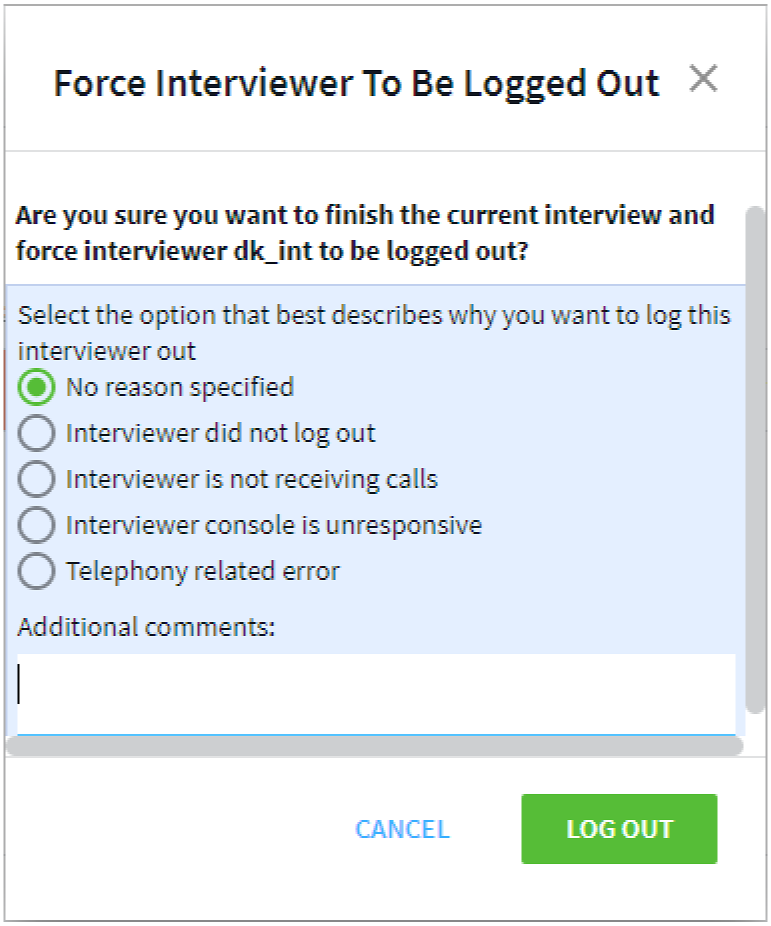


Figure 315 A dialog displayed when the supervisor tries to terminate the interview (force the logout)

The supervisor can specify the reason for which they opted to log the interviewer out. To do so choose the corresponding radio button from the list. You can also provide comments by typing the text in the Additional comments field.

Click Log out to force the interviewer's logout. Click Cancel to close the dialog window and cancel the action.

The reason chosen for the logout is not shown to the interviewer whom this action is applied to. A system message is displayed for the interviewer who has been logged out forcibly - refer to for description.

The reason chosen by the Supervisor for logging an interviewer out is saved to the event log only, and it is not included in any report generated by the CATI Supervisor module. Interviews that were terminated by the supervisor with the use of the above described procedure are assigned the "Terminated by the system" extended status.

Another situation also requires executing the Terminate command - the supervisor must terminate the interview whenever the interviewer has been automatically logged out for any reason (except for the reason described above).

Important!
The Supervisor should ALWAYS terminate the current task for the interviewer who was automatically logged out due to some technical reason (the dialer failure etc). This is done using the Interviewer List window. The Supervisor should click the Terminate icon in the grid for the corresponding interviewer(go to Monitoring Interviewers and their Work on page 315 for more information). If the Terminate command is not performed, this interviewer will not be able to log in to work with the Interviewer Console again.

7.2.10. Deferred Monitoring in CATI Supervisor

The CATI Supervisor module allows for complete recording of all actions performed by the interviewer, and his/her conversation with the respondent, held in the course of the interview. This function is called "Deferred monitoring". Recorded interviews contain a video track (actions performed by the interviewer in the CATI Interviewer Console), and, optionally, an audio track (conversation held between interviewer and respondent during the interview process).

Unlike the live monitoring (go to Monitoring Interviewer's Work in Real Time on page 325 for more information), the Deferred Monitoring function provides the Supervisor with on-demand access to any finished recorded interview. The Supervisor can watch and optionally listen to the complete interview process after it is finished.

Note that there is also a possibility of listening to an audio track of the recorded interview directly from the list of interviews/calls displayed in the Call Management window (see (go to Recording and Playing Back Conversations on page 185 for more information) for details).

Live and deferred monitoring can be conducted simultaneously. This means that any interview can be monitored in real time (live monitoring) with the deferred monitoring option enabled so that it is saved for viewing at a later time.

The deferred monitoring function becomes available only in case the appropriate option was enabled in the CATI Options tab in the Survey Settings in the Confirmit Authoring module, see the hint below. Refer to the Confirmit Authoring manual for further information.

Before you start using the Deferred Monitoring function you should check for the following:

- The *Enable whole interview screen recording* option must be enabled in Confirmit Authoring module (CATI Options tab in Survey Settings). When this option is enabled all actions carried out in the Interviewer Console during the interview are recorded and saved as a video file. If this option is not enabled, interviews will not be recorded in video format, and will not be available for deferred monitoring later.
- If you want conversations held in the course of the interviewing to be recorded alongside the video, check whether the *Enable whole interview audio recording* option is enabled in Confirmit Authoring module (CATI Options in Survey Settings). When both options are enabled, the audio track will be saved and can be played back later in sync with the video file.
- Also ensure that the Dialer is in the "*connected and activated*" state. If the Dialer is not in the "*connected and activated*" state (see (go to Managing Dialers on page 360 for more information) for information regarding dialer state), and the *Enable whole interview audio recording* option is not enabled, conversations held in the course of the interviews will not be recorded.

To check whether the *Enable whole interview screen recording* and *Enable whole interview audio recording* options are enabled or disabled you should turn to the General tab of the Survey Properties view (see (go to Viewing and Modifying a Survey's General Properties on page 72 for more information)). The status of both options is displayed on this tab.

Refer to Managing Dialers for instructions on enabling the Dialer and checking its current state.

Mind that if you are going to play back the recorded interview that contains an audio part you will not be able to download the audio track for the recorded interview in case the dialer is not started. Check if the Dialer is started (and start it if it is not) before you initiate playback of the recorded interview that contains an audio track.

After the **Enable whole interview screen recording** option (in Confirmit Authoring) is enabled, all interviews will be recorded automatically and added to the Recorded Interviews list. The same is true for the ***Enable whole interview audio recording*** option - when it is enabled all telephone conversations held in the course of all interviews are recorded automatically.

Video files with recorded interviews are stored on the server for 90 days, and they are deleted after this period expires. The same applies to audio tracks.

Note that the *Enable whole interview screen recording* and *Enable whole interview audio recording* options are managed independently. For example, in case "video" recording is disabled while "audio" recording is enabled, all interview conversations are recorded and saved as audio tracks, and could be accessed through the Call Management window interface (see (go to Recording and Playing Back Conversations on page 185 for more information) for details).

Note that the CATI Monitoring Console should be installed on your computer - this utility is required to perform all kinds of interview monitoring. Refer to Downloading the CATI Monitoring Console Installation Files for information on how to download and install the CATI Monitoring Console. You can check if it is installed by browsing the Uninstall or Change Program list which you can display by choosing the Programs and Features group in the Windows Control Panel menu.

To play a recorded interview:

1. In the Navigation Menu in the left frame choose the Recorded Interviews object.

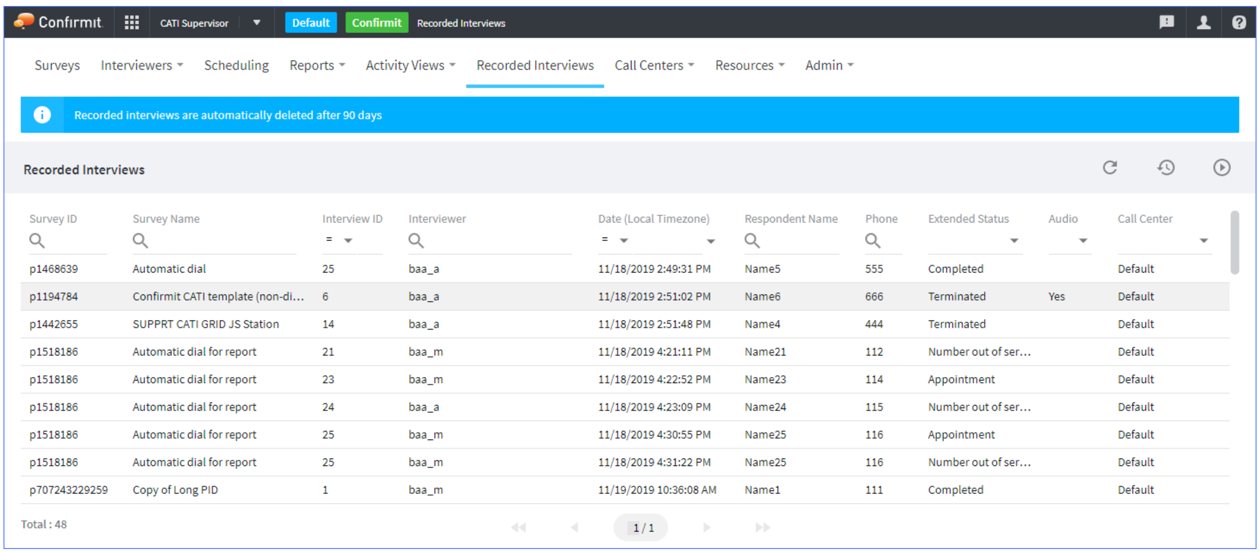


Figure 316 Viewing the list of recorded interviews

The right frame will display the list of all recorded interviews. This list includes interviews performed by the interviewers belonging to the current company.

2. The following information is available for the listed interviews:

- Survey ID
- Survey name
- Interview ID
- Interviewer name
- Date (Local Timezone) - interview date (for the local time zone)
- Respondent name
- Phone - respondent's phone number
- Extended Status - the extended status in which the interview was at the moment the recording has ended
- Audio - audio recording availability
- Call Center - Call Center which the survey was assigned to at the time the interview was conducted

3. In case you have applied a filtering criteria using the searchable column header (see (go to Searching for Records in the List on page 7 more information)), you can remove this filter (and reveal all existing records) by pressing the Reset button in the frame toolbar.
4. To start playing the recorded interview you should select it in the list of the Recorded Interviews and either right-click the selected interview and choose Play from the context menu, or double-click it, or click the Play button in the toolbar above the list.

Mind that the dialer should be connected (see (go to Managing Dialers on page 360 for more information) for information regarding dialer state) before you initiate playback or download of the recorded interview otherwise you will not be able to access the audio track of the recording (it is stored on the dialer side). The system will warn you by displaying a message explaining the reason why you cannot access the audio track of the interview recording.

5. The Play command will initiate download of a file containing the recording of the selected interview. The standard MS Windows file download dialog box will appear prompting you to choose whether you want the file to be opened from its location or to be saved elsewhere.

   If you decide to save the file, the standard Windows Save File dialog box will open. The file you save will have the .cspd extension. Choose the path to save the file. You can later run the file from this location.

   The CATI Monitoring Console also provides you with the opportunity to save the recording of the interview which is currently being played in the Monitoring Console, see the next step for instructions.
6. After the interview recording is opened, the CATI Supervisor Player starts.

The CATI Supervisor Player

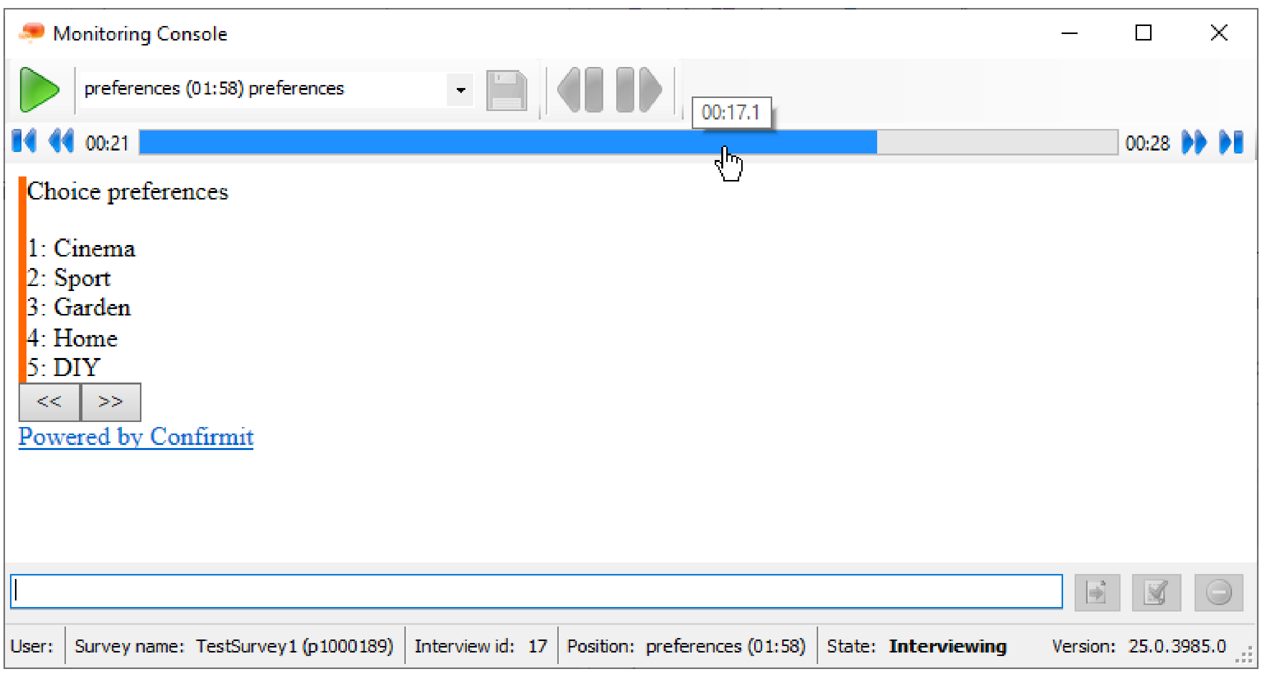


Figure 317 Recorded interview displayed in the CATI Supervisor Player

Recorded interview is displayed in the CATI Supervisor Player window starting from the very first page that the interviewer saw in the CATI Interviewer Console when he started this interview. Since this is the video recording, the interview pages are displayed on the screen as long as it took in the real life.

Pay attention to the information displayed in the status bar. In addition to the regular information set (go to The CATI Console User Interface on page 257 for more information) and (go to Monitoring Interviewer's Work in Real Time on page 325 for more information) the status bar displays the name and starting position (time) of the interview question which is being played currently ("Position" section).

The Player provides you with the ability to control the playback: you can stop and resume the playback, or jump to a particular question in the interview, jump to a selected moment inside a question, skip 10 seconds forwards or backwards, skip to the beginning of the current or next question.

To stop playback click the Pause button on the Player toolbar. The interview playback is suspended and the button turns into the Resume button . You can resume the interview playback by pressing the Resume button which then turns again into the Pause button.

There are two ways to select a question which you want to jump to. The first is to click the drop-down question list next to the Pause/Resume button on the toolbar. The list unfolds and you can choose a question from this list (see the picture below). The interview playback then resumes from the beginning of the chosen question.

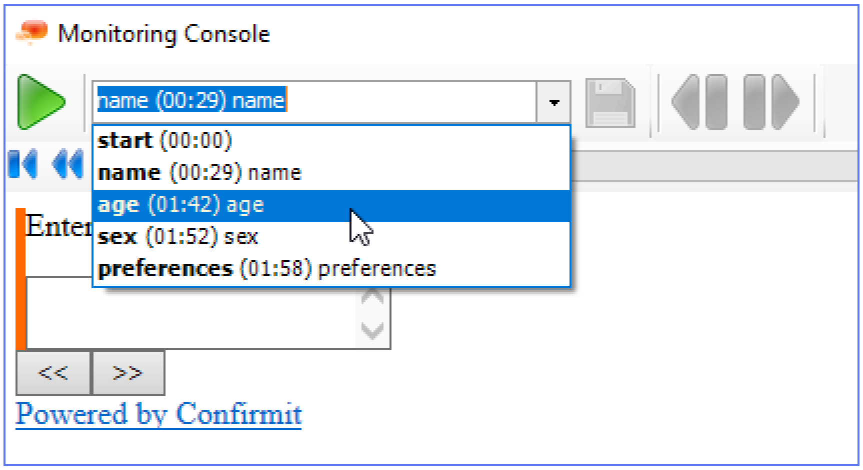


Figure 318 Choosing an interview question to jump to

Pay attention that all questions in this list are accompanied by their start time (time elapsed since the moment the interview was started until this question was displayed in the Interviewer Console).

In case you remember the question name you can start typing it directly in the drop-down list field. The Player will then automatically complete the name by choosing from the existing interview question names. Auto completion changes as you type to match the typed string. You can choose from any of 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 choose a question to jump to while the playback is paused the Player will jump to the start of the chosen question but playback will not be resumed automatically, you will have to click the Resume button to start it.

The blue progress bar visually indicates time elapsed from the start of the current question. It gives you the ability to skip to a particular place inside the question - hover the mouse pointer over the progress bar and the tooltip above the pointer will tell the exact time (in mm:ss format, and tenths of a second are also shown for short timings) for this position on the timeline. When you click on the selected position the progress indicator moves to this place. If the playback was in progress at the moment, it resumes from this particular place. If the playback was paused before you clicked the progress bar, the progress indicator will move to the chosen place but the playback will still be paused - you should click the Resume button to start it.

Clicking the "skip" buttons on the left and on the right of the progress bar does the following:

- when the Skip forwards button is clicked - the playback skips 10 seconds forwards;
- when the Skip forwards button is clicked - the playback skips 10 seconds backwards;

- when the Skip to the track beginning button is clicked - the playback resumes from the beginning of the current question:
- when the Skip to the next track beginning button is clicked - the playback resumes from the beginning of the next question (or stops if this was the last question);

  An audio track should ideally play in sync with the video. Sometimes audio and video tracks may become misaligned. Then you can adjust the gap between audio and video tracks by "nudging" the audio track about 2 seconds back or forward. To "nudge" the audio track backwards or forwards you should click respectively the Back or Forward button in the Supervisor Player toolbar (Back and Forward buttons become available only in case the audio track is present). One stroke moves the audio track about 2 seconds correspondingly backwards or forwards along the video timeline.

  While the playback is in progress you have an option of saving the recorded interview to a location of your choice. To save the recorded interview you should click the "Save recording" button on the Monitoring console toolbar while the playback is in progress. The standard Windows Save As dialog appears prompting you to choose the location for saving the file. Interview recording playback is paused at that moment and when you finish choosing the path for saving the file and the Save As dialog closes the Monitoring Console appears with the interview playback in the paused state. You have to click the Resume button to resume playback. The saved file will have the .CSPO extension. This file in fact 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 inside it:

- events.cce - all recorded interview events (video sequence);
- audio.wav - audio track for the recorded interview. It is created only in case 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 made. The format of the file name is the following: ProjectID_InterviewID_TimeStamp_IntervuewerID_CallAttempt. The time stamp equals the value in the corresponding Date cell and has the format DDMMYYYYHHMMSS (the Date column in the list of the recorded interviews). For example - CATI_p1089344_12_12012015132531_74.

7. After the interview playback finishes, you can play another recorded interview, or repeat the playback of this interview following steps of the present instruction. Any interview can be played back an unlimited number of times.

7.3. Monitoring Appointments

To monitor appointments supervisor has to choose the Appointment List from the Activity Views object in the Navigation frame (see (go to Monitoring in the CATI Supervisor on page 307 for more information)). It is then opened in the Appointment List dialog window.

By default the Appointment list displays the list of currently opened surveys showing information regarding appointments (see the picture below).

The list contains the following information:

- Survey ID.
- Survey name.
- Count of appointments which fall into the short period specified for monitoring appointments (go to Setting Up Time Intervals for Monitoring Appointments on page 341 for more information)
- Count of appointments which fall into the long period specified for monitoring appointments (go to Setting Up Time Intervals for Monitoring Appointments on page 341 for more information)

You can choose to display the last two columns show count of appointments which fall into the corresponding time range.

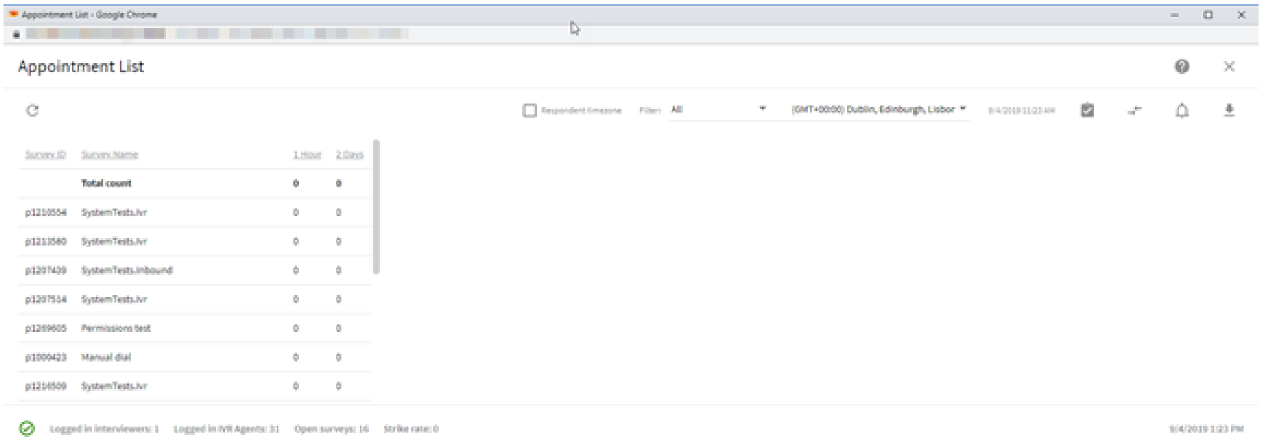


Figure 319 Activity Views - Appointment List dialog window

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 (see the picture below).

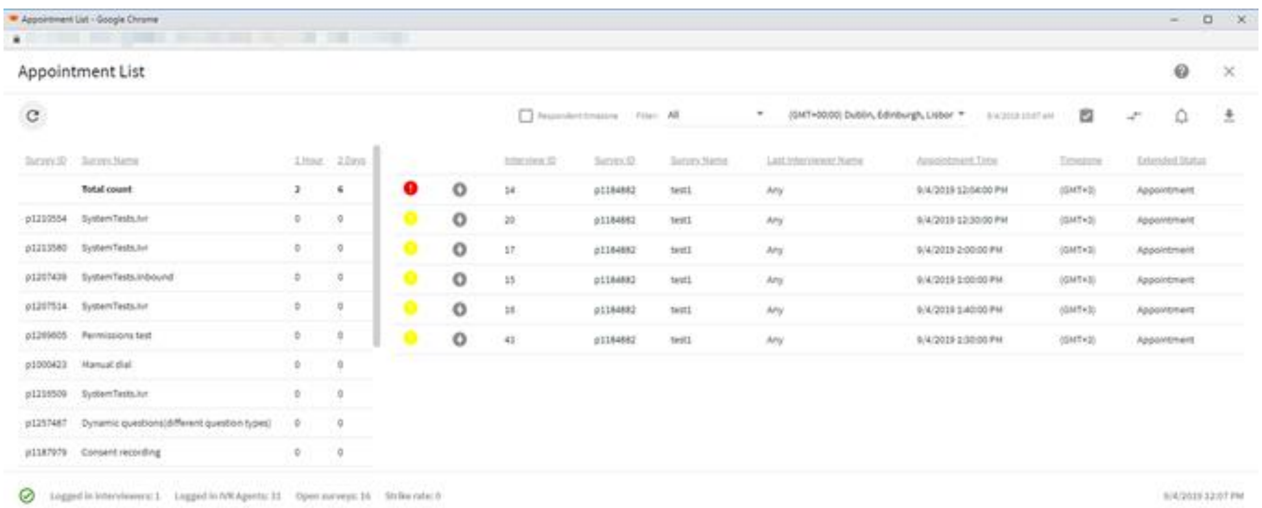


Figure 320 The Appointment List window displaying the list of alerts

The list of alerts provides the Supervisor with the following information (presented in the grid columns):

- Alert indicator - shows whether the appointment is due or overdue(go to Setting up Alerts for Monitoring Appointments on page 341 for more information)
- Activate button - allows performing the Activate operation with the corresponding interview(go to Setting up Alerts for Monitoring Appointments on page 341 for more information)
- Interview ID.
- Survey ID.
- Survey Name.
- Last interviewer name.
- Appointment time - 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 dialog window also contains a toolbar with the following buttons and indicators.

Button	Description	Function
	REFRESH	Allows updating 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 filtering appointments by extended statuses.
Drop-down list	SELECT TIMEZONE	Allows specifying timezone that will be used to display all appointment time values.
Date and time indication	Current date and time in the selected timezone	Shows current date and time in the timezone which was selected using the drop-down list in the toolbar.
	SELECT SURVEYS	Displays the survey selection form. Allows selecting surveys for which the list of appointments is 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. Allows specifying alert threshold for one parameter.
	EXPORT	Exports current appointment list in MS Excel format.

The Appointment Alert list also contains an Activate button which enables you to activate a call directly from the list.

7.3.1. Selecting Appointments to Display in the Grid in the Appointment List Window

Supervisor can choose surveys for which the list of appointments should be displayed in the grid. This can be done with the help of the Survey Search form using which supervisor can search for surveys by their names, or can apply filter to the survey list.

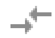
To select surveys for displaying in the appointment list:

1. Click the Surveys button on the toolbar.

   This will display the Select Surveys dialog window (see description of this window here - Selecting Surveys to Display in the Survey List Activity View).

2. Click Save selected in this dialog window when you are done selecting surveys. This will refresh the appointment list in the Appointment List dialog window, leaving only appointments pertaining to the selected surveys and hiding all other appointments.

7.3.2. Setting Up Time Intervals for Monitoring Appointments

The list of appointments displayed in the left pane of the Appointment List window shows the amount of appointments falling into a short and into a long time interval. These intervals are specified with the help of the Select intervals for appointment counters form. Click the Intervals buttons  - it is displayed right below the button.

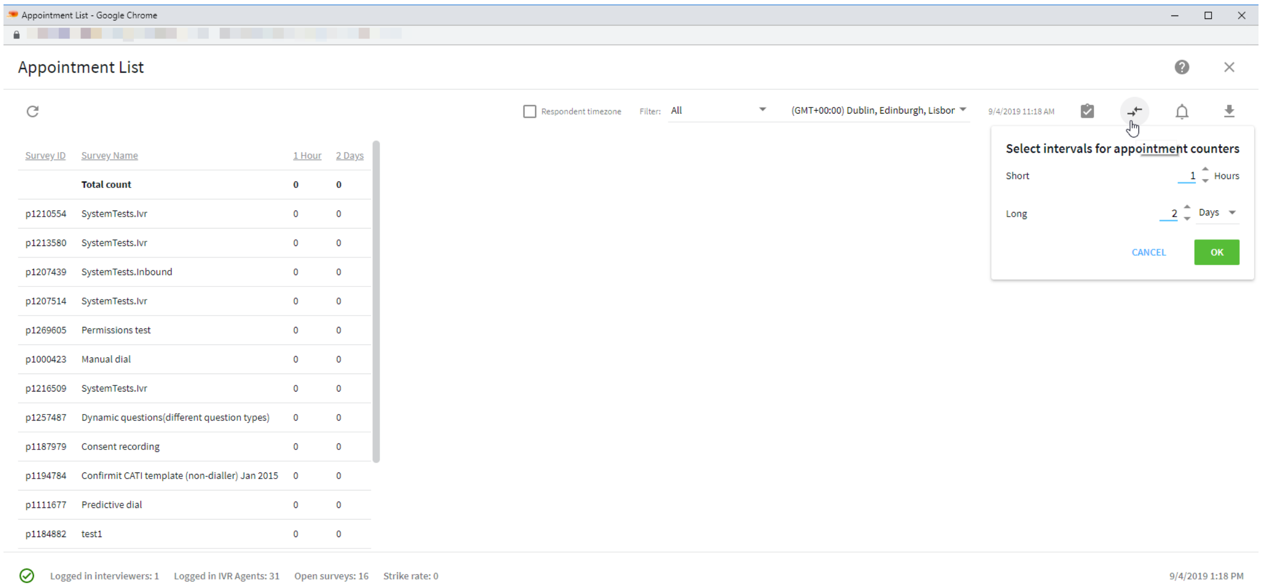


Figure 321 Setting up intervals for appointment counters

The short interval is set in hours with the help of the Short spinbox, the long period can be set up both in hours and in days. The Long spin box allows selecting a value, and the drop-down list next to it allows choosing between days and hours.

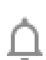
Pressing OK activates the specified monitoring values. The grid will then display statistics for the specified intervals.

7.3.3. Setting up Alerts for Monitoring Appointments

Alert is set up in order to warn supervisor of appointments that are due in a specified time period. Also the alert can warn in case some of the appointments are overdue. Supervisor can set up one time for the "About to be due" alert and another time for the "Overdue after" alert. These values are used to monitor all appointments.

Sometimes an interviewer is unable to conduct the appointed interview at the specified time. Or some situation may require changing interview parameters. Supervisor can handle such situations by modifying parameters of the appointed interview. He can change the interview start time, its priority, or reassign this interview to another person/group.

To set up the appointment alerts:

1. Click the Alerts button  on the Appointment List toolbar.

   This will display the Appointment Time form right below this button.

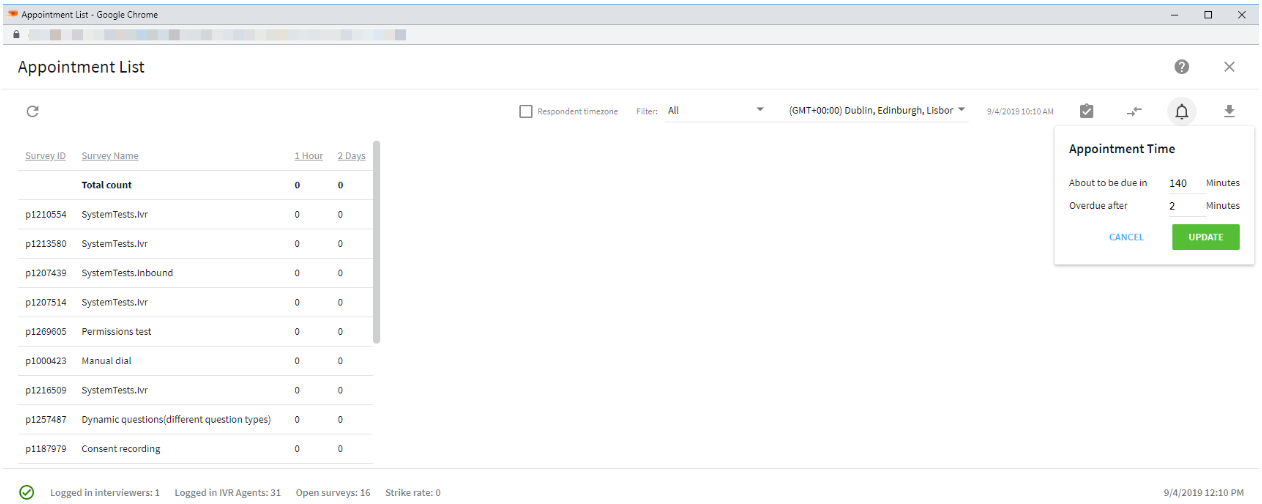


Figure 322 Setting up appointment alerts

2. Enter value in the "About to be due in a number of minutes" field. This alert parameter indicates that there are appointments for this survey that are due in the specified number of minutes.
3. The "Overdue after a number of minutes" parameter lets you see if there are overdue appointments.
4. Click the Update button to activate alerts.
5. When any specified alert threshold is reached, the Appointment List dialog window displays a corresponding interview in the grid to the right of the survey list. The interview alert grid lists all interviews which are due within the time period specified in the “About to be due in N minutes” field and which are overdue for the specified amount of time - "Overdue after N minutes".

The supervisor cannot remove the alert information from the list. An appointment is removed from the list automatically when the interview is delivered to an interviewer, or when this appointment expires, or when a corresponding 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.

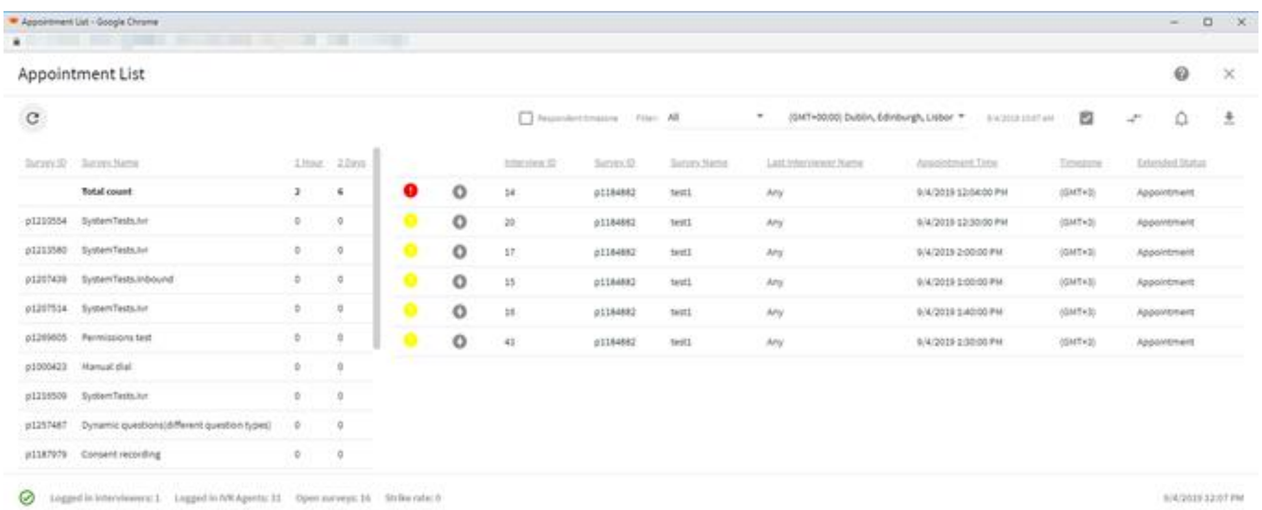


Figure 323 Monitoring the appointment alerts

Note that there are different ways to create an appointment and the extended status of an interview/call can reflect the fact how the appointment was set up. The extended status with the value of "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 will be listed in the "Filter" drop-down box. The "Filter" control is used to filter alerts by the extended statuses: when the "All" option is selected, all alerts are shown, when other extended status is chosen - only alerts with the coresponding status are shown, others are hidden.

You can choose a timezone from the next drop-down box: this selection changes the displayed date/time values shown in the toolbar. This indication helps you in finding out the current time and date at the desired location.

The Appointment List automatically refreshes every minute and it can be refreshed on demand by clicking on the “Refresh” button in the toolbar.

The leftmost column in the grid displays the alert indicator – the yellow icon in case the appointment is due in the specified time and the red icon in case the appointment is overdue for the specified time.

The second to the left column in the alert list contains the Activate button . When pressed, this button invokes the Activate dialog window which allows modification of the interview’s call parameters (see Activating the Alerted Interview for details).

6. You can export the current Appointment List to a file in the MS Excel format by pressing the Export button . Refer to (go to Exporting the Appointment List on page 343 for more information) for procedure description.

7.3.3.1. Activating the Alerted Interview

Supervisor can modify parameters of the appointed interview when this interview appears in the appointment alert list.

Supervisor can do this by activating the interview. To activate an interview they have to click the Activate button in the corresponding interview row in the list.

This action allows changing the interview priority, time and date of the interview start, and it also allows reassigning interview to another person/group.

Refer to Activating an Interview/call for detailed instructions on activating the interview.

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 Grid in the Appointment List Window on page 340 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 certain extended statuses. These groups can then be assigned to particular interviewers (available only for users belonging to designated companies);
- **Dialer** - a set of settings which are used to configure the way the dialing system handles certain situations related to dialing routines;
- **Inbound settings** - this section allows managing settings related to "dial-in" calls. Available as a chargable add-on;
- **External transfer** - this section allows adding and managing "external" (i.e. not related to the current company) telephone numbers that will be used for call transfers;
- **IVR settings** - this is a set of options related to "machine-guided" interviews (when a respondent is guided by a robot-read or recorded messages and provides answers by pressing phone keys);
- **Telephone Blacklist** - a list of numbers that should not be used by a 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. This will unfold the drop-down menu list. Select the tool/facility you need in 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 482 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 a 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 the 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 72 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 (Navigation menu). Then choose the Extended Status Codes item from the drop-down list that unfolds. This will display the list of Extended Status Code groups in the top frame of the CATI Supervisor main window.

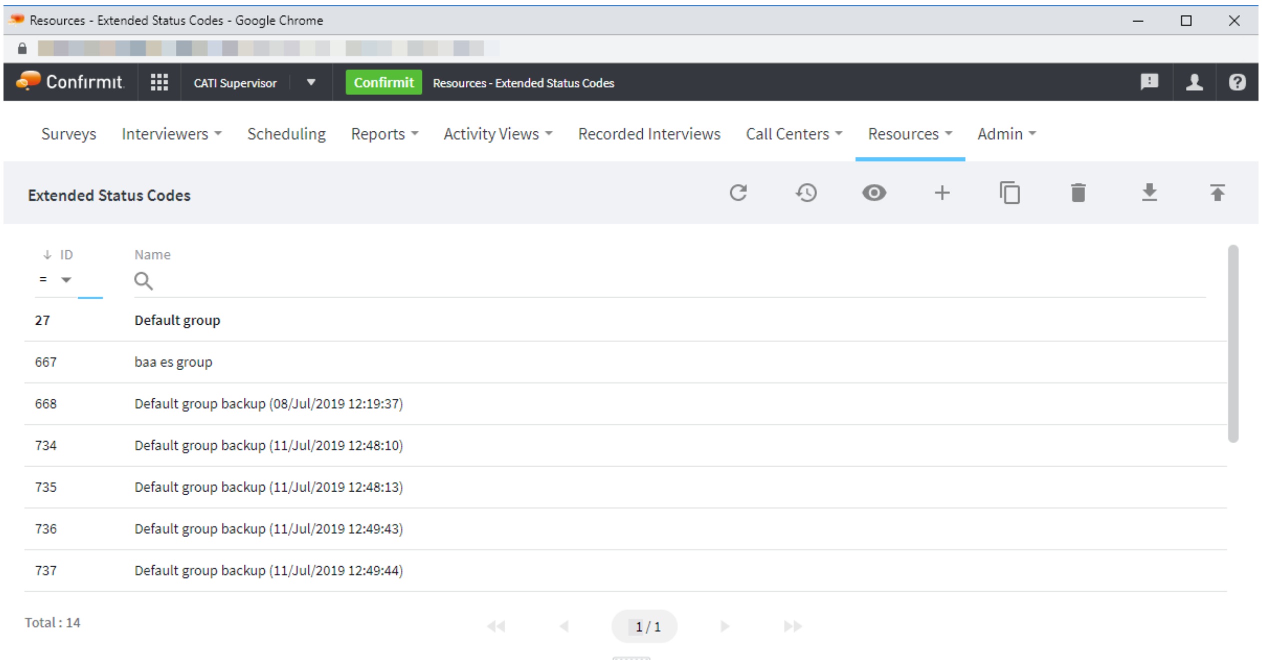


Figure 324 Viewing the Extended Status Code group list in the top frame

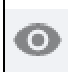
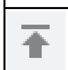
2. The user can perform the following operations with the Extended Status Code groups:

- 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-clicking the row containing an appropriate Extended Status Code group description), or by selecting a row in the grid and pressing buttons on the toolbar in the top frame.

   To refresh the Extended Status Code group list click the Refresh button  on the toolbar.

3. When the top right frame displays the list of Extended Status Code groups 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 window and allows creating a new Extended Status Code group
	PROPERTIES	Displays the Extended Status Code group properties in the bottom frame. You can edit these properties.
	DUPLICATE	Duplicates the selected Extended Status Code group.
	DELETE	Deletes the selected Extended Status Code group
	EXPORT	Allows exporting the selected Extended Status Code group
	IMPORT	Allows importing 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 opened in the top right 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. This will display the New state group dialog window.

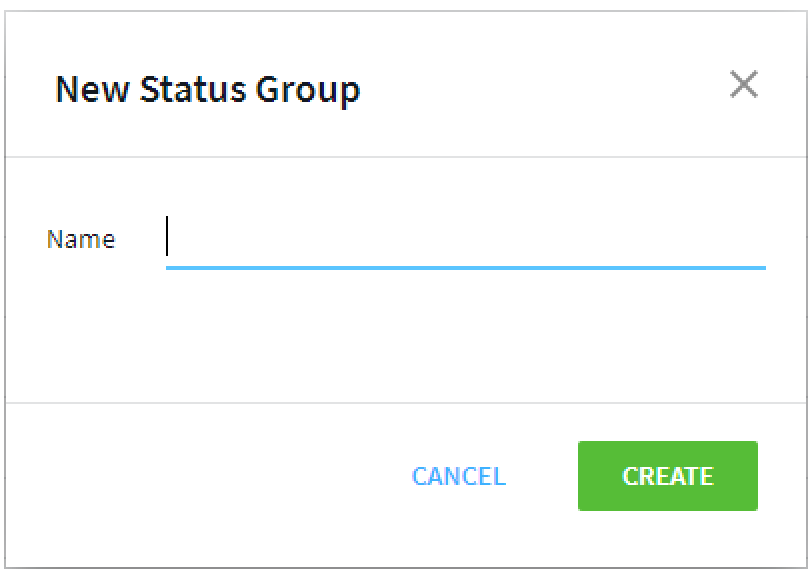


Figure 325 Adding a new extended status group to the list

2. Enter the name for the new group in the Name field and click OK.

3. The list in the top right frame refreshes and the new group appears in that list.

4. Each new group of the Extended Status Codes contains predefined default set of Extended Statuses – you cannot delete any extended status from this set, but you can change the extended status properties. Only some of the Extended Status Code properties are editable – see Viewing and Modifying the Extended Status Code Group Properties for details.

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 in the list in the top right frame, or click the **View** button on the toolbar, or right-click its name and choose **View** from the shortcut menu.

   This will display properties of the selected Extended Status Code group in the bottom right frame.

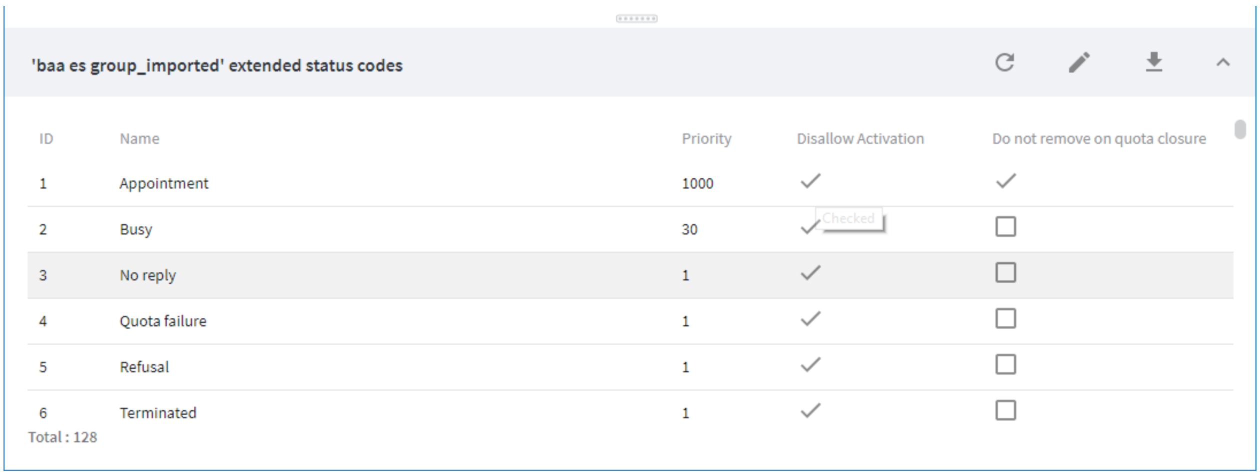


Figure 326 Viewing the extended status list

The list of extended statuses normally contains a set of 30 predefined statuses, which ID and name cannot be changed. This status set is predefined, and each new group added to the list already contains such a set. Predefined extended statuses are assigned IDs of 1 through 30. Also each Extended Status group contains a number of "custom" statuses (with IDs ranging from 31 to 1000). Properties of the "custom" statuses can be edited with the exception of their ID value. There is also a special group of predefined Extended Statuses with IDs greater than 1000. Their ID and name can not be changed also.

Note that you can neither delete, nor add a new extended status to a group. All you can do is modify 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 in the bottom right frame, 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.

   This will display the Edit dialog window containing current status properties.

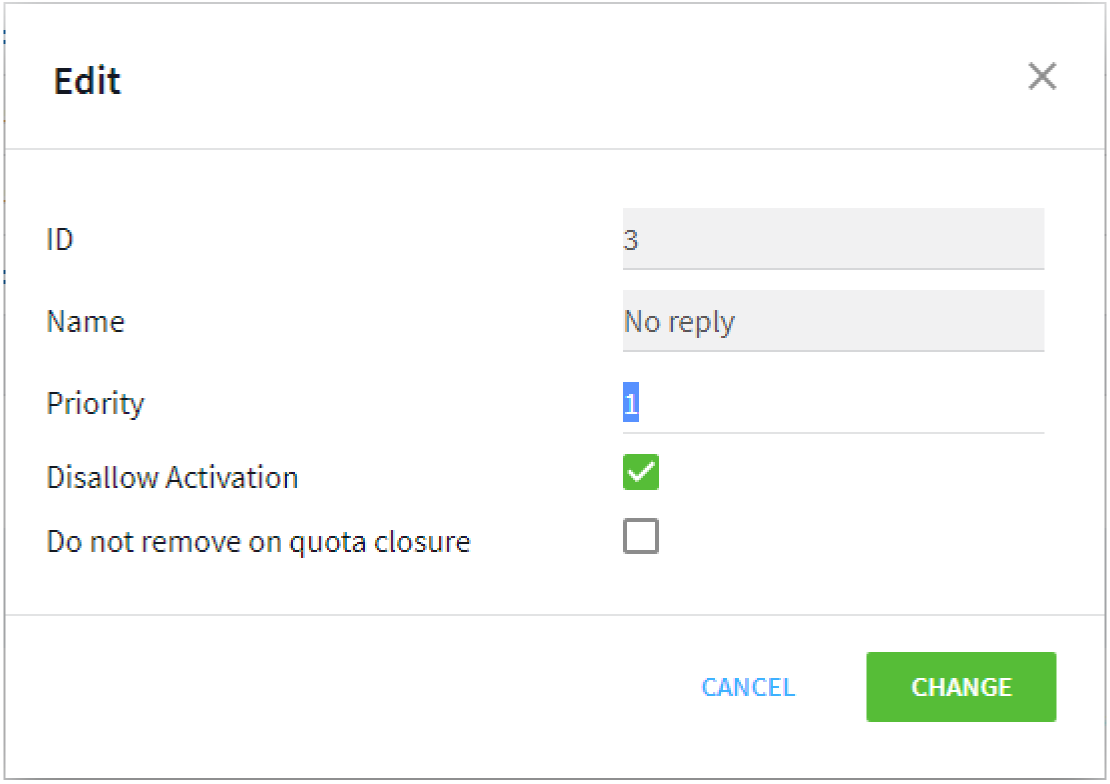


Figure 327 Modifying the extended status properties

Use this form to modify extended status properties.

The default priority value set by means of this operation is assigned to calls with this status when a "Move and Reschedule" operation is applied to the call in Call Management. Here is an example. Let us say that the default priority for a "Busy" status is set to 5. When a supervisor moves and re-schedules a call (any call in any status) to the "Busy" status then the priority for thIl call will be set to 5.

That value is overridden by the one set by the applicable ac tion if it already exists in the survey sc

2. For the first 30 statuses (ID ordinal number) you will be able to modify the Priority value and check (enable) / clear (disable) the Disallow Activation box. Statuses with their ID value falling into the range from 31 to 1000 are the "custom" statuses and their names can be changed.

   When the Disallow Activation option is enabled (this box is checked) all interviews/calls with that extended status are prohibited from being assigned the Active state (see Viewing the Interview/Call List section for description of this state).

   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 461 for more information) for more information on "Call filtering behaviour for filled quotas".

   Click **Change** in the Edit dialog window 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 surveys you run you may use this group's properties as the default.

To this end you should copy the properties of the chosen group to the Default.

To copy properties of the chosen group to the Default one you should select an Extended Status Code group in the list, right-click on it and choose "Copy to default" from the context menu that appears. The system will automatically create a backup copy of the current default group before copying over all of the settings of the selected group.

The newly created default group will be assigned the "Default group" name while the previous default group will get the name ending in "...backup (time/date stamp)" which shows the time and date this backup was created (see an example in (go to Viewing the Extended Status Code group list in the top frame on page 345 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 top right frame select the required group in the list in the grid and click the Delete button on the toolbar, or right-click the required group row and choose Delete from the shortcut menu. This will delete the selected Extended Status Code group from the list
2. 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 that same CATI Supervisor system.

To export an Extended Status Code group

1. Select the Extended Status Codes group item in the Extended Status Code group list in the top right frame and click the Export button on the toolbar, or right-click the group name in the list and choose Export from the shortcut menu.
2. In the standard Windows Save As dialog that appears choose the path and enter the file name to save the exported file. 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 in the top right frame and click the Export button on the toolbar.
2. In the standard Windows Open file dialog that appears choose an existing file which contains the list of extended status codes and click Open. Note that the name of the Extended Status Code group contained in the file selected for import should not coincide with any already existing in the system group name. If the system system encounters exact name match it will terminate the import procedure and display the corresponding warning message. You will have to edit either the name of the group existing in the system, or the name of the group you are going to import.
3. When the import process finishes the imported group appears in the Extended Status Code group list in the top right frame.

8.2. Configuring the Call Groups

The Call Groups are used to create and manage groups of calls with certain extended statuses that can be assigned to chosen interviewers.

The purpose of a Call Group is to define a set of calls with certain extended statuses that would have a higher priority than other calls, and would be delivered to the interviewers before other calls.

Note that the Call Group mode can be enabled only for the interviewers who are assigned for working in the Survey Selection task choice mode.

For the interviewer to be able to work in the Call Group mode he should be assigned to work in this mode. Refer to (go to Viewing and Modifying the Interviewer Properties on page 39 for more information) for instructions on how to enable the Call Group mode for an interviewer.

Also the Call Group Mode should be enabled for the certain survey. Refer to (go to Viewing and Modifying a Survey's General Properties on page 72 for more information) for instructions on how to enable the Call Group mode for a survey.

Note that Call Groups are not supported for surveys with the predictive dial mode enabled.

The interviewer working in the Survey Selection task choice mode will receive calls in the following order.

Calls are delivered in the round robin fashion:

- Of these calls first come calls having the highest call priority;
- Next come calls with the highest extended status priority;
- Then come 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, this is accomplished by modifying this interviewer's properties - refer to (go to Viewing and Modifying the Interviewer Properties on page 39 for more information) for instructions.

Important!
For the interviewer to start working in the Call Group mode, he must be assigned to a call group, he must work in the Survey Selection task choice mode, and the Call Group mode must be enabled for the survey he is 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. This will display the list of Call Groups in the top frame of the CATI Supervisor main window.

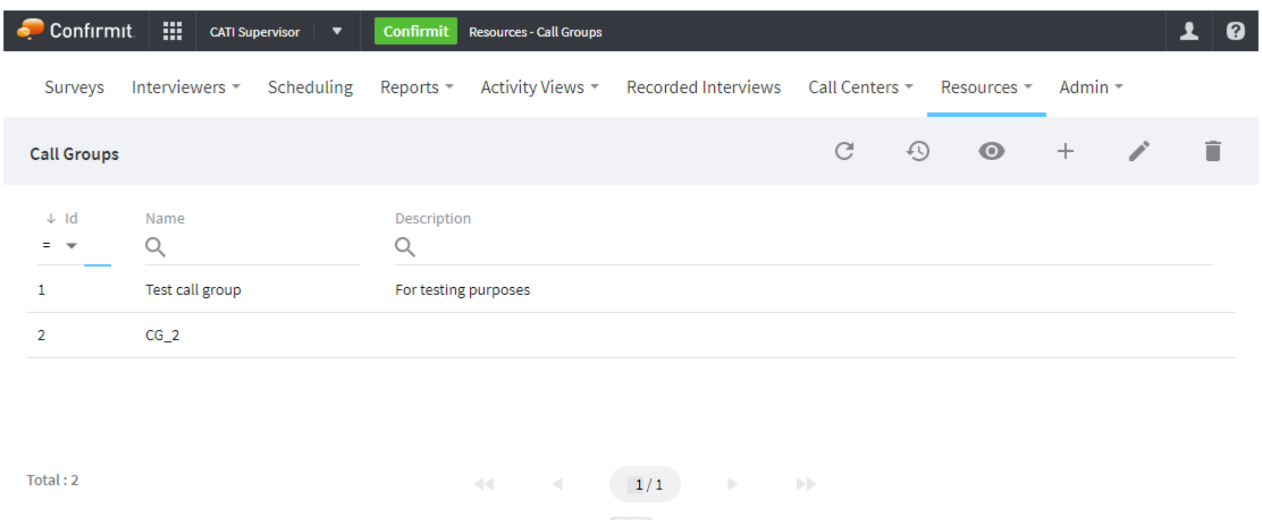


Figure 328 Viewing the Call Group list

2. The user 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 pressing buttons on the toolbar in the top frame.

3. 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 modal window and allows creating a new Call Group
	VIEW	Displays parameters of the selected Extended Status Code group in a modal window. 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. This will display the New Call Group modal window.

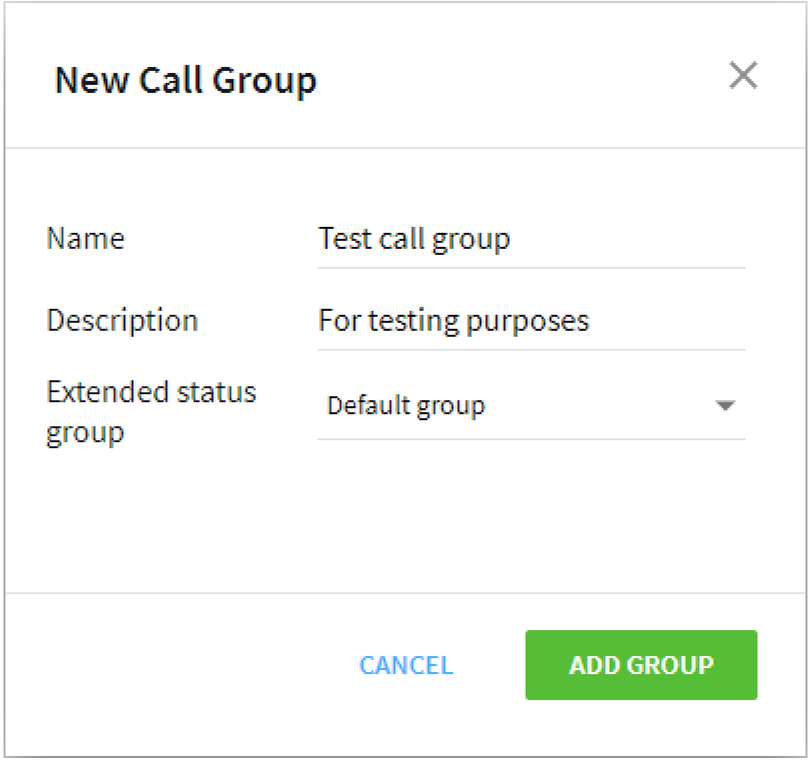


Figure 329 Adding a new call group to the list

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 corresponding drop-down list. You can choose from the list of available extended status groups - refer to (go to Configuring the Extended Status Groups on page 344 for more information) for information on what these groups are used for and how they are created. The chosen Extended status group is used with the current Call Group.
4. Click the Add Group button. The modal window 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 opened in the top frame click the Properties button  on the toolbar, or right-click any row in the list in the grid and choose Properties from the shortcut menu. This will display the Edit Call Group modal window.

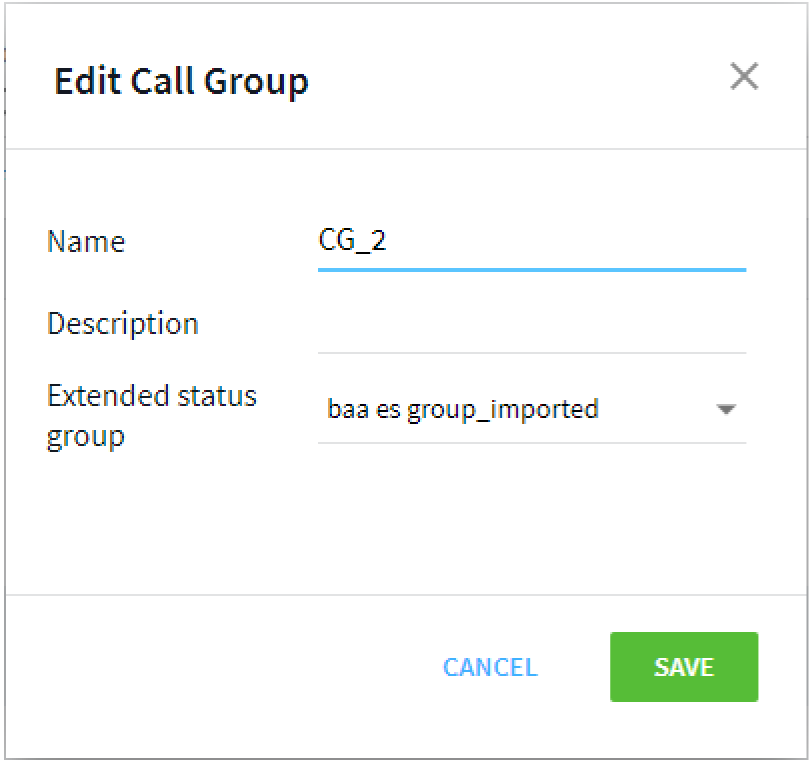


Figure 330 Modifying the call group properties

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 corresponding drop-down list. You can choose from the list of available extended status groups - refer to (go to Configuring the Extended Status Groups on page 344 for more information) for information on what these groups are used for and how they are created. The chosen Extended status group would be used with the current Call Group.
4. Click the Save button. The modal window closes and the call group with modified properties appears in the Call Group list.

8.2.4. Viewing and Modifying the Call Group Parameters

This procedure is used whenever you need to configure parameters of the freshly created call group, or edit parameters of an already existing call group.

Note the delivery algorithm when you configure the call group parameters - refer to (go to Configuring the Call Groups on page 349 for more information) for the description of the delivery algorithm used with the Call Groups.

Important!
For the interviewer to start working in the Call Group mode, he must be assigned to a call group, he must work in the Survey Selection task choice mode, and the Call Group mode must be enabled for the survey he is working with.

You can find the complete list of the predefined extended statuses in (go to Appendix F - List of Predefined Extended Statuses on page 482 for more information).

We would recommend referring to section (go to Modifying the Interview/Call Properties on page 141 for more information) for information on how Extended Status Codes are used with interviews and calls.

To view and modify the Call Group parameters:

1. Double-click the Call Group item in the list in the top right frame and click the View button on the toolbar, or right-click its name and choose View from the shortcut menu. This will display properties of the selected Call Group in the bottom right frame - see the picture below.

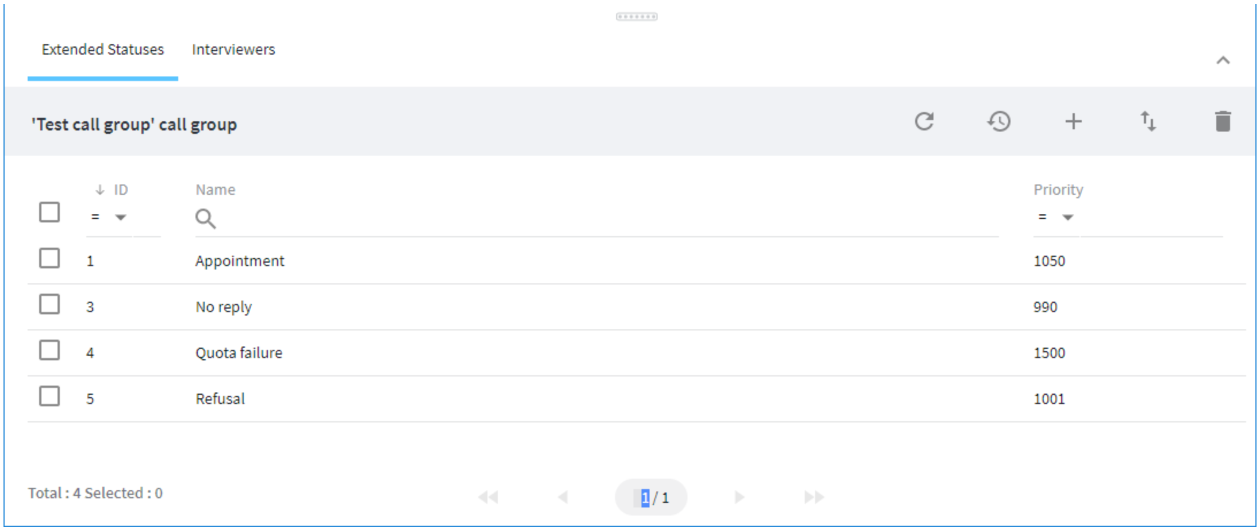


Figure 331 Viewing the Call Group parameters

You can edit the Call Group parameters as follows:

When you need to add a new extended status to the call group, change to the Extended Statuses tab and click the **Add** button on the bottom frame toolbar, or select the extended statuses you need to delete, right-click any selected row and choose **Delete** from the context menu. This will display the Add Statuses dialog window.

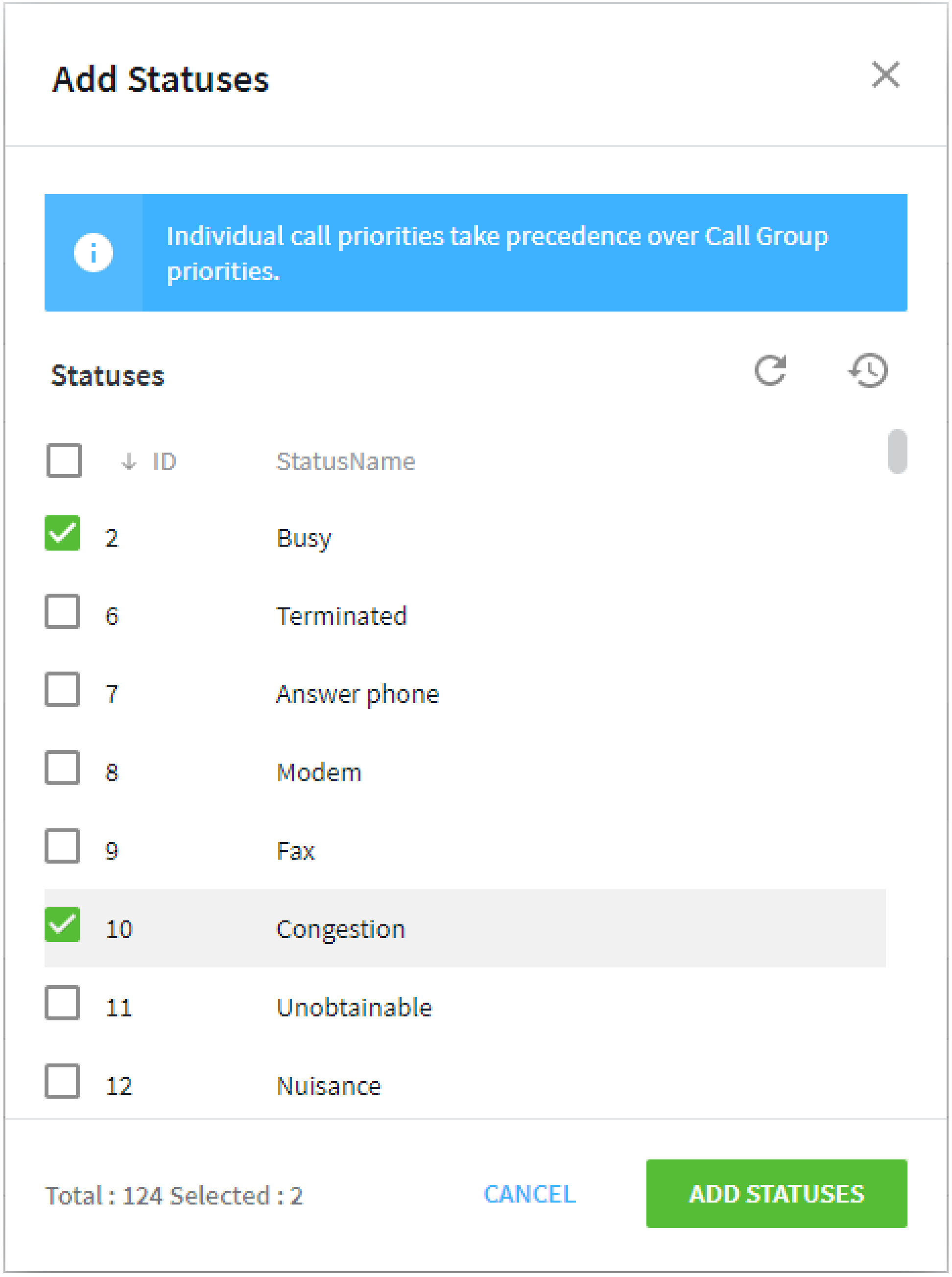


Figure 332 Adding extended statuses to the Call Group

The list in the dialog window always contains only those extended statuses which 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 you should select one or a number of extended statuses in the list on the Extended Statuses tab, and click the Delete button on the frame toolbar, or right-click any selected row and choose Delete from the context menu.

   The warning message is displayed asking you to confirm deletion of the selected extended statuses. Click OK to delete extended statuses.

3. By default all extended statuses are added to the list with priority value that equals 1. You can change the priority of the chosen group.

   You can also 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.

   This will display the Change Priority dialog window.

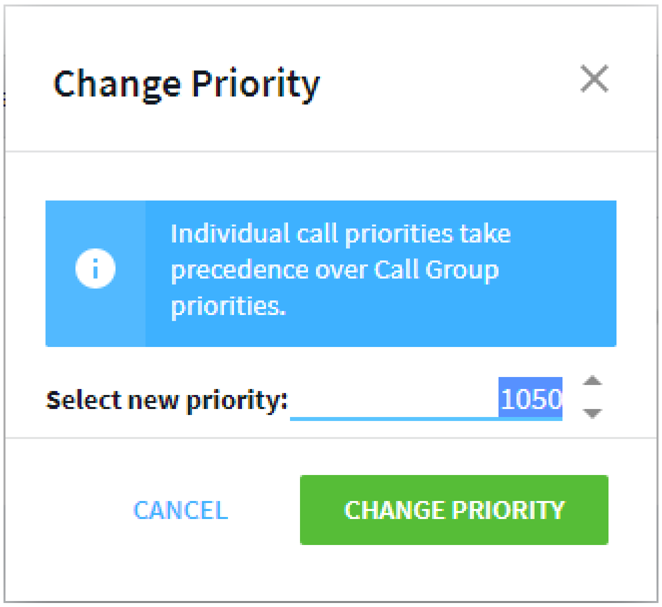


Figure 333 Changing the priority value of the selected extended status in the Call Group

   Select the new priority value using the Priority spinbox. Click the Change Priority button to confirm your choice.

   The modified priority value will be displayed in the Priority column of 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. Next you can assign interviewers to the call group. Change to the Interviewers tab in the right bottom frame.

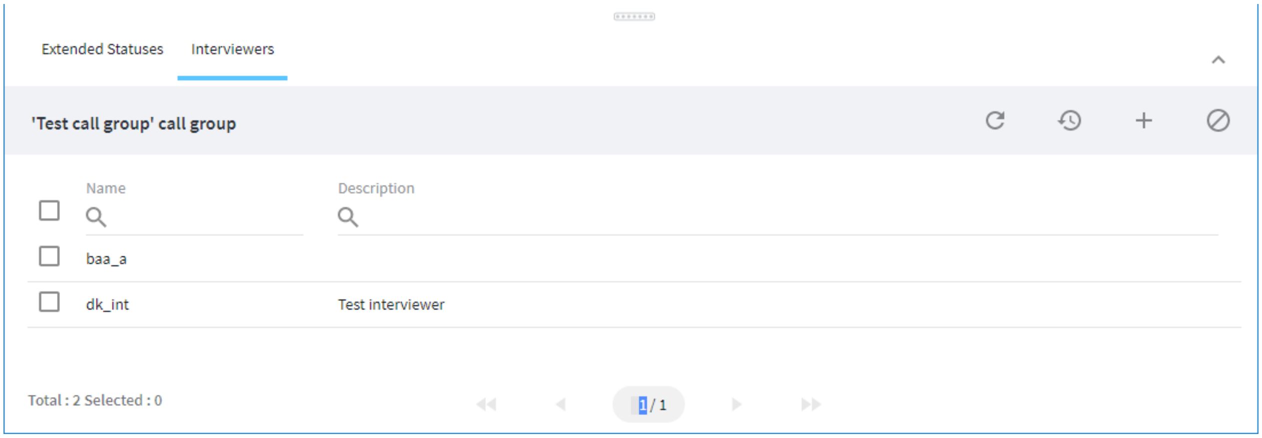


Figure 334 Managing interviewers assigned to call groups

To add an interviewer to the call group click the New button on the toolbar. This will display the Add Assignment dialog window.

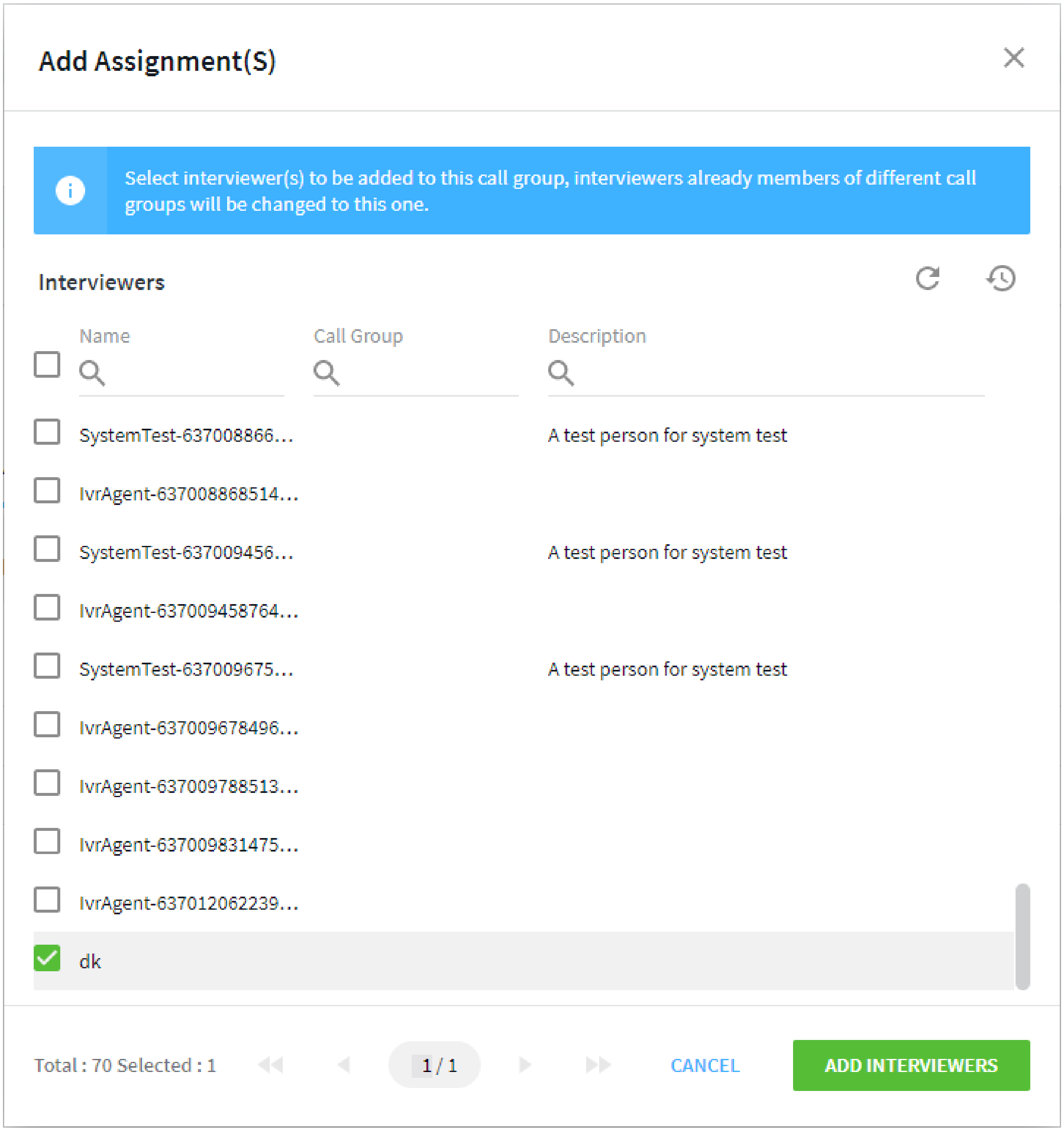


Figure 335 Assigning a new interviewer to the call group

Select one or a number of interviewers in the list and click Add assignments below this list. Selected interviewers will apear in the list on the Interviewers tab.

You can deassign interviewers from the call group. To do this select one or a number of interviewers in the list on the Interviewers tab and click the Deassign button on the frame toolbar.

CATI Supervisor will ask you to confirm assignment deletion. Click OK to confirm - selected interviewers will be deleted from the list of assigned interviewers.

8.3. Dialer

A Dialer in Confirmit terms stands for a dialing system. A dialing system is a hardware/software complex which task is to aid and facilitate the dialing routine in a CATI system. The simple explanation of the dialer purpose is that it frees the interviewer from the dialing job and automatically delivers connected calls to him in the way specified by the CATI Supervisor. In case dialer is engaged, the interviewer only has to wait for another connected call - he/she is not supposed to perform dialing tasks in this case. Usually a dialer is a third party service provided by a telephone company, an Internet service provider etc.

A dialer works in conjunction with the CATI Supervisor module and performs the following tasks:

- accepts the command to commence dialing (in the specified dialing mode - see explanation below) telephone numbers contained in the sample;
- tracks and processes the dialing results according to the specified dialing mode;
- tracks and processes the interviewers' load level;
- delivers the connected calls to the interviewers.

CATI Supervisor can be used with different dialer types - it can be TCI, or ProTS, or other systems. The difference between the dialer types is mostly in the service functions they provide. Refer to the present chapter and to Managing Dialers for descriptions of dialer peculiarities.

The supervisor can perform the following operations with any dialer that is currently shown in the dialer list:

- add a dialer and configure the dialer settings;
- edit a dialer and the dialer settings;
- delete a dialer;
- connect/activate a dialer;
- disconnect/de-activate a dialer;
- view a dialer log file.

The dialer settings are displayed in the bottom right frame. These settings pertain to all dialers that are currently used with the company. The same settings are available on the Dialer Settings tab of the Survey View (see (go to Configuring the Survey Related Dialer Settings on page 108 for more information) for information). These settings override the company wide settings and they are applied to this survey only.

The CATI Supervisor module is capable of working with a number of dialers concurrently. All available dialers are listed on the Dialer tab of the Resources object tab.

Important!
In the event a number of dialers are used with CATI Supervisor 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.

Dialer must be available and operational so that CATI Supervisor module can access it and exchange information and commands with it. The Dialer is initially enabled by the Supervisor and then it can be engaged or rejected by each interviewer that logs in to work with the CATI Interviewer Console. To allow interviewers to engage the Dialer the supervisor must connect and activate it first (see (go to Managing Dialers on page 360 for more information) for instructions).

The CATI Supervisor module monitors the current state of each Dialer and displays this information (see Managing Dialers for details).

The picture below shows the list of dialers displayed on the Dialer tab.

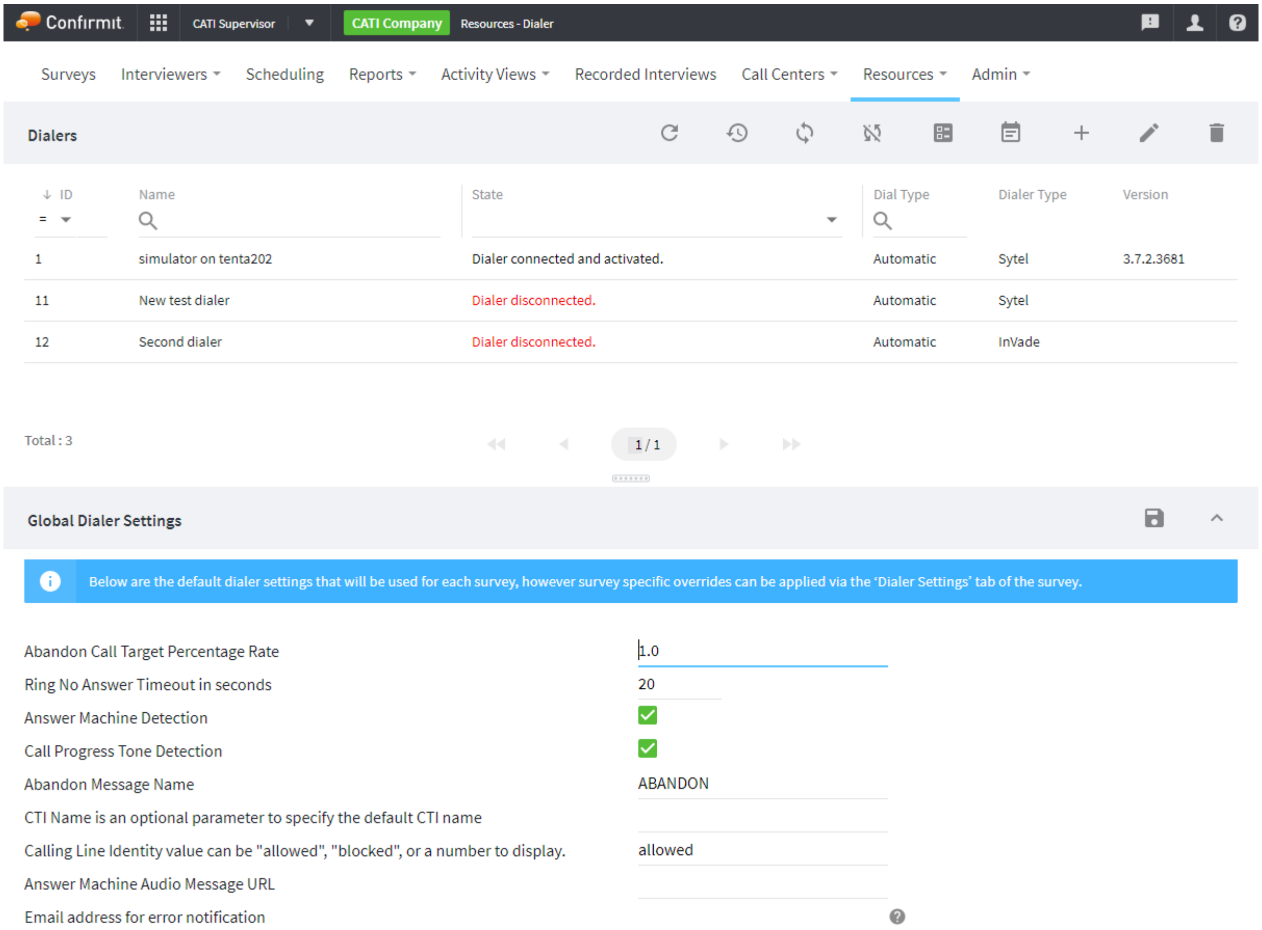


Figure 336 A list of dialers used in a company

8.3.1. Managing Dialers

The CATI Supervisor module is capable of working with a number of dialers concurrently. All available dialers are listed on the Dialer tab (Resources section) in the top right frame (one dialer per row).

Important!
In the event a number of dialers are used with CATI Supervisor, they must all be of the same type (either several TCI dialers, or several ProTS dialers). CATI Supervisor module cannot work with dialing systems of different types simultaneously.

The supervisor can monitor the current status of each dialer and connect/activate or disconnect/de-activate the selected dialer (or a number of selected dialers at once).

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 de-activated it becomes inaccessible to those interviewers who are not working with it at the moment. The interviewers who are already working with it can continue current interviews until another dialing job is due. Then they will automatically be logged out. Before this automatic logout takes place, 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 accidentally disconnected for some technical reason all interviewers working with the dialer will receive a "telephony error" warning message. It is recommended to contact a system administrator or designated technical support person if the system does not resume its work shortly.

Important!
The Supervisor should terminate the current task for the interviewer who was automatically logged out due to the dialer failure. This is done using the Interviewer List window. The Supervisor should click the Terminate icon in the grid for the corresponding interviewer (see (go to Monitoring Interviewers and their Work on page 315 for more information) for button descriptions). If the Terminate command is not performed, this interviewer will not be able to log in to work with the Interviewer Console again.

Any dialer works independently of the CATI Supervisor module, it remains in the chosen state (connected/disconnected, activated/deactivated) no matter if the CATI Supervisor module is running or not. Current Dialer status is displayed in the State column in the grid in the top right frame.

The "Dial Type" column shows 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 the mobile phone numbers (see (go to Dialing in the Single Survey TCPA Mode on page 367 for more information) for information).

The "Dialer type" column displays the type of dialer currently used with the system (Pro-T-S or TCI etc.). Only a single dialer type is supported in case a number of dialers are used concurrently.

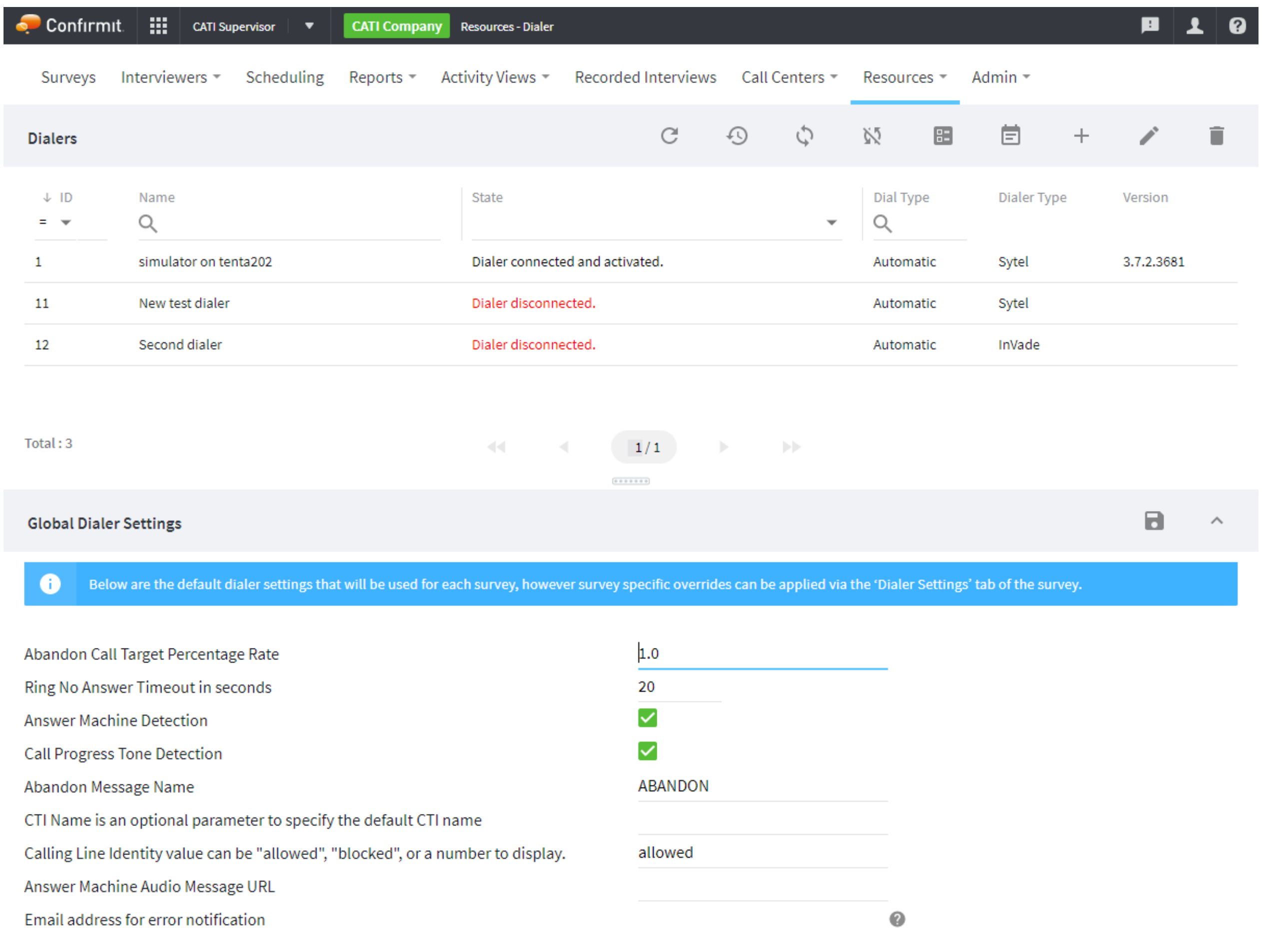


Figure 337 The list of dialers available in the system

Dialer settings are displayed in the bottom frame. Dialer settings pertain to all dialers currently used with the company so they are the same for all dialers listed in the top right frame. These are company wide settings, and they are used automatically for each survey. The dialer settings can be overridden for each particular survey: the same settings are available on the Dialer Settings tab of the Survey View (see (go to Configuring the Survey Related Dialer Settings on page 108 for more information) for information). The set of dialer settings is different for different dialer types. Refer to the dialer's documentation supplied by a vendor or check out hints by pressing the help button next to the relevant field.

The State column in the grid in the top right frame allows monitoring whether the Dialer is connected, activated or not.

The following dialer states are displayed in the grid in the top right frame. They indicate dialer's accessibility and status. These messages mean the following:

- "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 (available for configuration) but it is not available to interviewers (cannot be currently used for conducting interviews);
- "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 at all to conduct surveys. This dialer is not available for interviewers and cannot be configured at the moment.

A situation is possible when the Dialer could not 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 in the left frame choose the Dialer object in the Resources object group. All currently available dialers will be displayed in the grid in the top right frame, one dialer per row.
2. Select the Dialer (or a number of Dialers) you want to connect to in the grid.
3. Click the Connect/Activate button  on the toolbar, or right-click the selection and choose "Connect/Activate" from the context menu that appears.
4. This will display the Connect/Activate dialog.

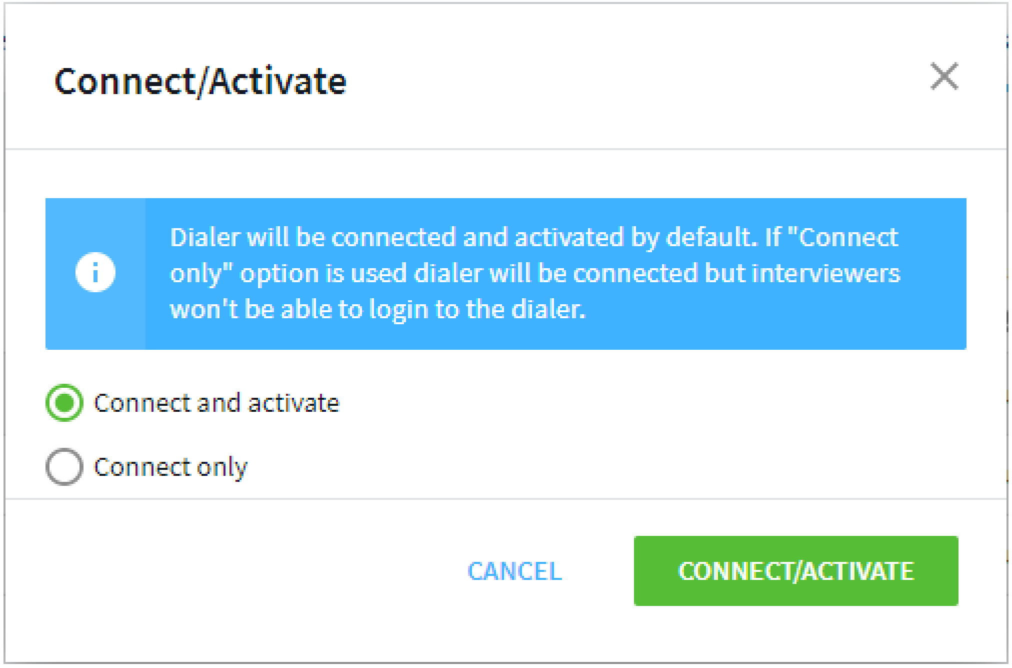


Figure 338 Connect/Activate dialog

Choose whether you want to connect and activate the dialer or only connect to it. Click the Connect/Activate button to start the procedure.

5. The Dialer list is refreshed. If the attempt was 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. Select the Dialer (or a number of Dialers) you want to disconnect from in the Dialer list.
2. Click the Disconnect/Deactivate button  on the toolbar, or right-click the selection and choose "Disconnect/Deactivate" from the context menu that appears.
3. This will display the Disconnect/Deactivate dialog.

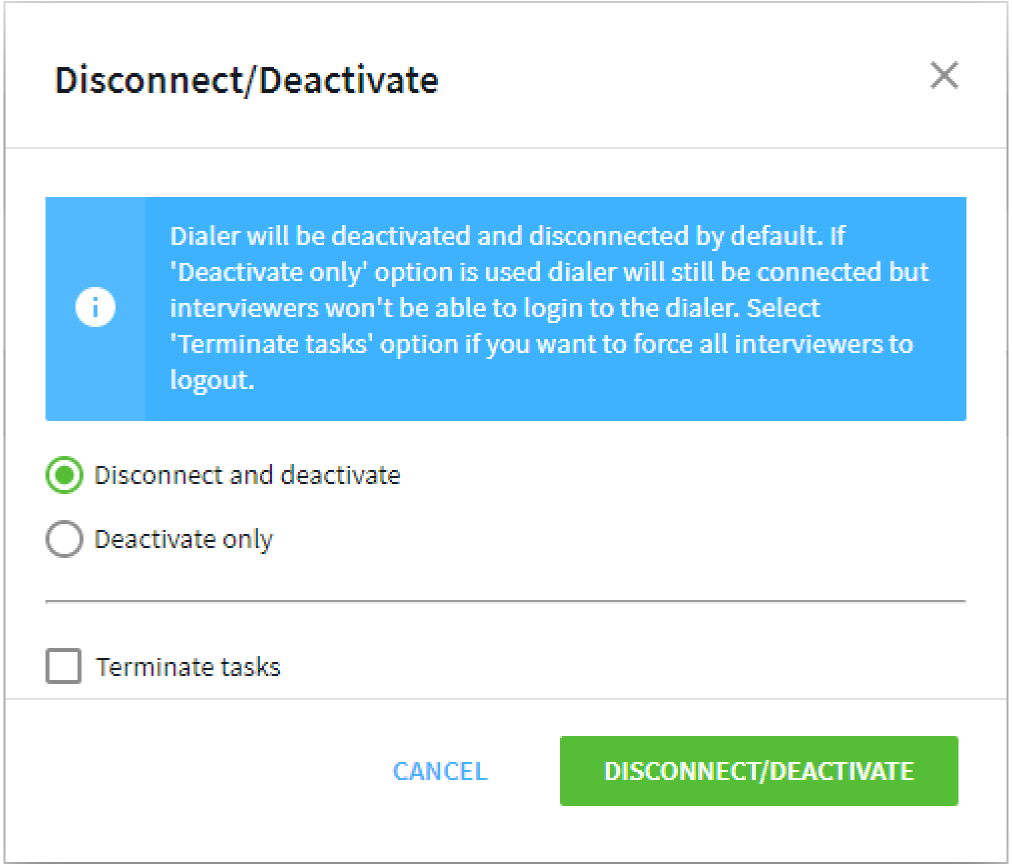


Figure 339 Disconnect/Deactivate dialog

Choose whether you want to disconnect and to deactivate the dialer or only to deactivate it.

Select the Terminate tasks option if you want to force all interviewers currently working with this dialer to be logged out. This option can be selected both when the Disconnect/Deactivate or only Deactivate option was chosen

Click the Disconnect/Deactivate button to start the procedure.

4. 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).

As an example, below are settings used with the TCI type of dialers:

- 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 should be performed by the dialer before the call attempt is considered as 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 by which connected calls would 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 the answer phone. If considered to be an answer phone, the call will automatically be classified as an answer phone. Note that enabling the answer phone detection can lead to a short delay before voice is delivered to an interviewer in all call attempts;
- Billing Code - the optional parameter that can be used to associate a billing code with a particular call. This option is typically used at the survey level. The value used can be utilized for dialer log file analysis for billing purposes;
- 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.

  Enter the required value(s) in each field (all fields are optional).

4. Click the Save button  on the bottom right frame toolbar to save the dialer settings after all changes have been made.

8.3.2. Working Without a Dialer

The company conducting a survey may as well work without a dialer. This means a dialer is not involved in the process of dialing numbers (all dialing tasks are carried out manually), and is not supposed to be available at all.

A situation is also possible when a dialer service is not available at all for some reason (either technical, or financial).

In both cases the Dialer tab in the Resources section of the Navigation menu remains accessible, the dialer list is displayed when the user chooses the Dialer tab, but on an attempt to connect and activate a dialer the system produces a warning message explaining that any listed dialer cannot be connected and activated because telephony is not currently enabled.

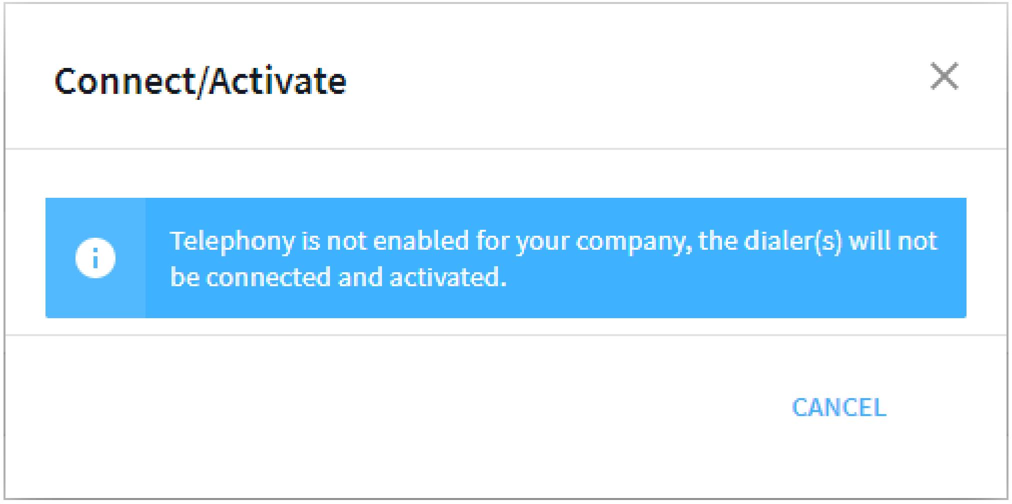


Figure 340 Warning displayed when the user attempts to connect a dialer with no telephony enabled

8.3.3. Dialing Mode

The Dialer operates in one of the four basic dialing modes and in one extra hybrid mode, which is a combination of the two basic. The dialing mode is specified as the CATI survey parameter in the Confirmit Authoring module. We recommend reading the appropriate chapters of the Confirmit Authoring User Guide for details on this procedure (for example "The CATI Options Tab" chapter). Once the dialing mode is specified for a survey in the Confirmit Authoring, the Dialer will operate only in this mode with this particular survey until the dialing mode is changed.

Note that you should not confuse the "dial mode" with the "task choice mode". These are different options. The dial mode is set up on the survey level (in the Confirmit Authoring module) and it determines how the interviews are delivered to the interviewer (see description at the beginning of this chapter). The task choice mode is set up for each interviewer (in the CATI Supervisor module) and it determines how the interviewer selects surveys/interviews he will work with (see (go to Selecting a Survey/Interview on page 263 for more information) for detailed descriptions).

The following dialing modes are available:

- Manual - assumes that the dialer dials only the number corresponding to the interview manually selected by the interviewer;
- Preview - assumes that the CATI Interviewer Console displays some information for the interviewer which he should view before proceeding, and the Dialer dials the number corresponding to the interview only after the interviewer confirms proceeding with that interview;
- Automatic - in this mode the system simply delivers connected calls to the interviewers one after another in the order specified by the task choice mode;
- Predictive (available only with the Pro-T-S dialers) - this dialing mode was designed to increase the productivity of the interviewers by performing the so called "predictive" dialing. In this mode the Dialer applies various algorithms that help delivering the required call to a free interviewer while keeping the number of failed ("nuisance") calls to the bare minimum. The dialer operating in this mode tracks and processes the call results, analyses and compares this results and the interviewer's load pattern and tries to "predict" (based on the calculated statistics) when should the particular number be dialed so that this interview could be delivered to an interviewer precisely after he finishes the previous interview.

- 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 certain (arbitrary) criterion is met the respondent will no longer be called in predictive (or automatic) mode, reducing the risk of being nuisance called. 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 met, 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, and so on.

The procedure of setting up the Hybrid dialing mode has some peculiarities. Unlike other dialing modes, the Hybrid dialing mode is set up both in Confirmit Authoring and in 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 just 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 alternative ways to set up the Hybrid mode for the survey.

To set up the Hybrid dialing mode using the scheduling script:

1. This option is available for surveys which are originally set to the Predictive or Automatic mode.
2. First, in CATI Supervisor, you should add a special rule to the scheduling script that is used with this survey. The rule should 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 such mark - for example, you can specify that the dial mode is switched to Preview whenever an interview with the "Appointment" status is met. This rule should contain the "Set dialing mode" action. Action parameter value should switch the survey to the Preview dialing mode. See (go to Specifying Scheduling Script Rules on page 224 for more information) for information on how to configure a scheduling script rule, and (go to Appendix A - Action Parameter Descriptions on page 472 for more information) for the list of action parameters and their values.
3. Next, in Confirmit Authoring, you should add a special algorithm to Confirmit survey - it should 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 switching with the help of an extra interview page, that would ask the interviewer to confirm switching to the Preview mode. Or you can use another way - refer to the Confirmit Authoring documentation for procedure descriptions.

To set up the Hybrid dialing mode using the sample:

1. This option is available for surveys which are originally set to the Predictive or Automatic mode.
2. When you prepare the respondent sample file for upload in Confirmit Authoring you should specify the appropriate dialing mode value for each required interview. This would be "2" for the Preview mode, and "0" - for the original mode (Predictive or Automatic). No other actions should be performed in that case.

To set up the Hybrid dialing mode in the Call Management window:

1. This option is available only for surveys which are originally set to the Predictive mode.
2. You should first display the Call Management window for the required survey which is set to the Predictive mode. Then follow the instructions which are set forth in (go to Setting Up the Preview Dialing Mode for an Interview on page 158 for more information). No other actions should be performed in that case.

8.3.4. Dialing in the Single Survey TCPA Mode

The Telephone Consumer Protection Act (TCPA hereinafter) 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 Confirmit Horizons software but the following section will focus on a scenario that provides separate landline and cell phone handling from a single survey. This mode of operation will be referred to here on in as the "Single survey TCPA mode". As with all TCPA mitigation scenarios, numbers should be verified before being loaded into Horizons. 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 will instruct the CATI Supervisor module to deliver to this interviewer only interviews associated with the landline phone numbers. In such case automatic number dialing becomes possible for this interviewer. The “Cellphone” option will tell the CATI Supervisor module to deliver to this interviewer only interviews associated with the mobile phone numbers. In such case only manual number dialing is allowed for this interviewer (go to Adding and Deleting an Interviewer on page 27 for more information).

Single survey TCPA mode is disabled by default. To have it enabled, make a request to support.

Dial type for each interview is specified in the sample file which contains respondent records and is created in (or uploaded to) the Confirmit Authoring module. Dial type can be specified for each sample record through the use of the system background variable called “DialType”. Refer to the Confirmit Authoring Manual for description of the sample file format. The “DialType” background variable can have two values: “0” stands for landline phone numbers and allows automatic dialing for this sample record (alongside manual dialing), while “1” stands for cell phone numbers and prohibits automatic dialing for this sample record (but still allows manual dialing).

Each interviewer is assigned a certain Dial Type: they can either be assigned the “Landline” dial type (such interviewers are allowed to work with interviews associated with the “Landline” phone numbers only), or they can be assigned the “Cellphone” dial type (which allows these interviewers to work with interviews associated with the “Cellphone” phone numbers only). 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.

A supervisor has the possibility to change the dial type for each interviewer at any moment. To do this they have to edit the properties of the interviewer (see (go to Viewing and Modifying the Interviewer Properties on page 39 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. This information is available in the Call Management window. The Dial Type column is shown for calls in all states – it contains an indication of the assigned dial type, either “Landline”, or “Cellphone” (go to Viewing the Interview/Call List on page 121 for more information).

The Interviewer Activity View has got a special filter which allows selecting which interviewers are displayed in the View: either with the “Landline”, or with the “Cellphone” dial type assigned, or all interviewers at once (go to Monitoring Interviewers and their Work on page 315 for more information).

The “DialType” background variable can also be used in scripting. Refer to the Confirmit Scripting manual for details.

8.3.5. Adding a Dialer

The supervisor with the System Administrator permission can add a dialer to the system.

To add a dialer to the system:

1. Choose the Dialer tab of the Resources section in the left frame. In the right frame toolbar choose the Add dialer button. Alternatively you can right-click any row in the list of dialers in the top frame and choose Add from the context menu. This will display the Add dialer dialog.

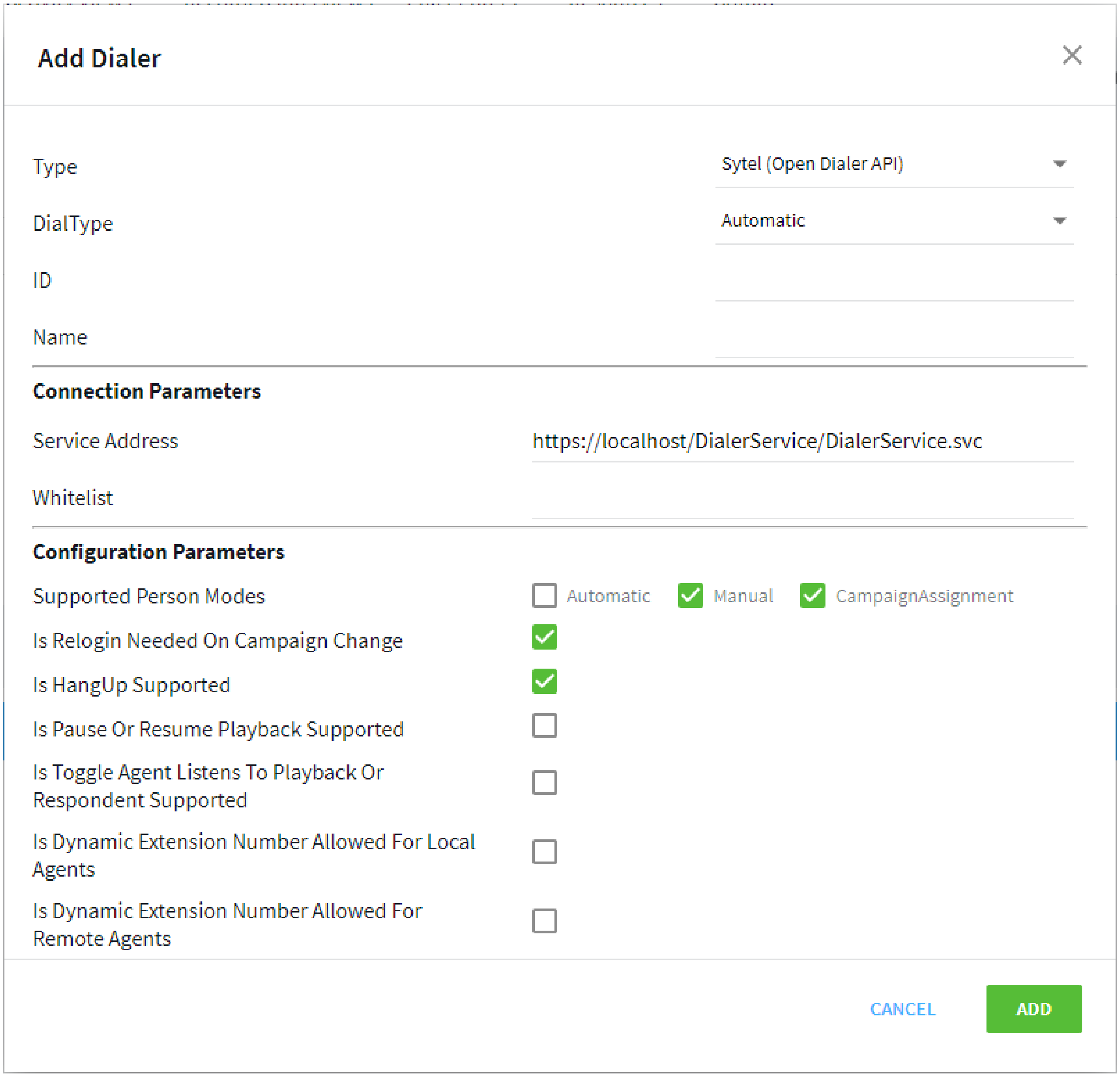


Figure 341

2. Choose the type of the dialer in the Type field (remember that in case there are multiple dialers used with the system they should all be of one and the same type).
3. Choose the dial type from the DialType drop-down list. Mind that a "Manual" type can be used for dialing mobile phone numbers.
4. Next enter an ID (any unique combination of digits) and a Name.
5. The Connection Parameters section contains parameters managed by a system administrator. Contact your system administrator if you have questions concerning these parameters.
6. The Configuration Parameters section also contains parameters managed by a system administrator. Contact your system administrator if you have questions concerning these parameters.

7. Click the Add button when you are done configuring these parameters. The CATI system checks settings for validity. If they are valid, the dialer is added to the dialer list. If not - the system displays a warning message stating the error. Correct the error and try again then.

8.3.6. Editing a Dialer

The supervisor with the 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 should first disconnect and deactivate the dialer and, after the changes are saved, connect and activate it again.

To edit a dialer:

1. Choose the Dialer tab of the Resources section in the left frame. You should disconnect and deactivate the dialer you are going to edit (see (go to To disconnect or to disconnect/deactivate the dialer on page 363 for more information) for instructions). When the dialer state is indicated in the list of dialers as "Disconnected and deactivated" you can proceed with editing. In the right frame select the dialer you need to edit and choose the Edit dialer button  on the frame toolbar. Alternatively you can right-click the required dialer settings in the dialer list in the right frame and choose Edit from the context menu. This will display the Edit Dialer dialog.

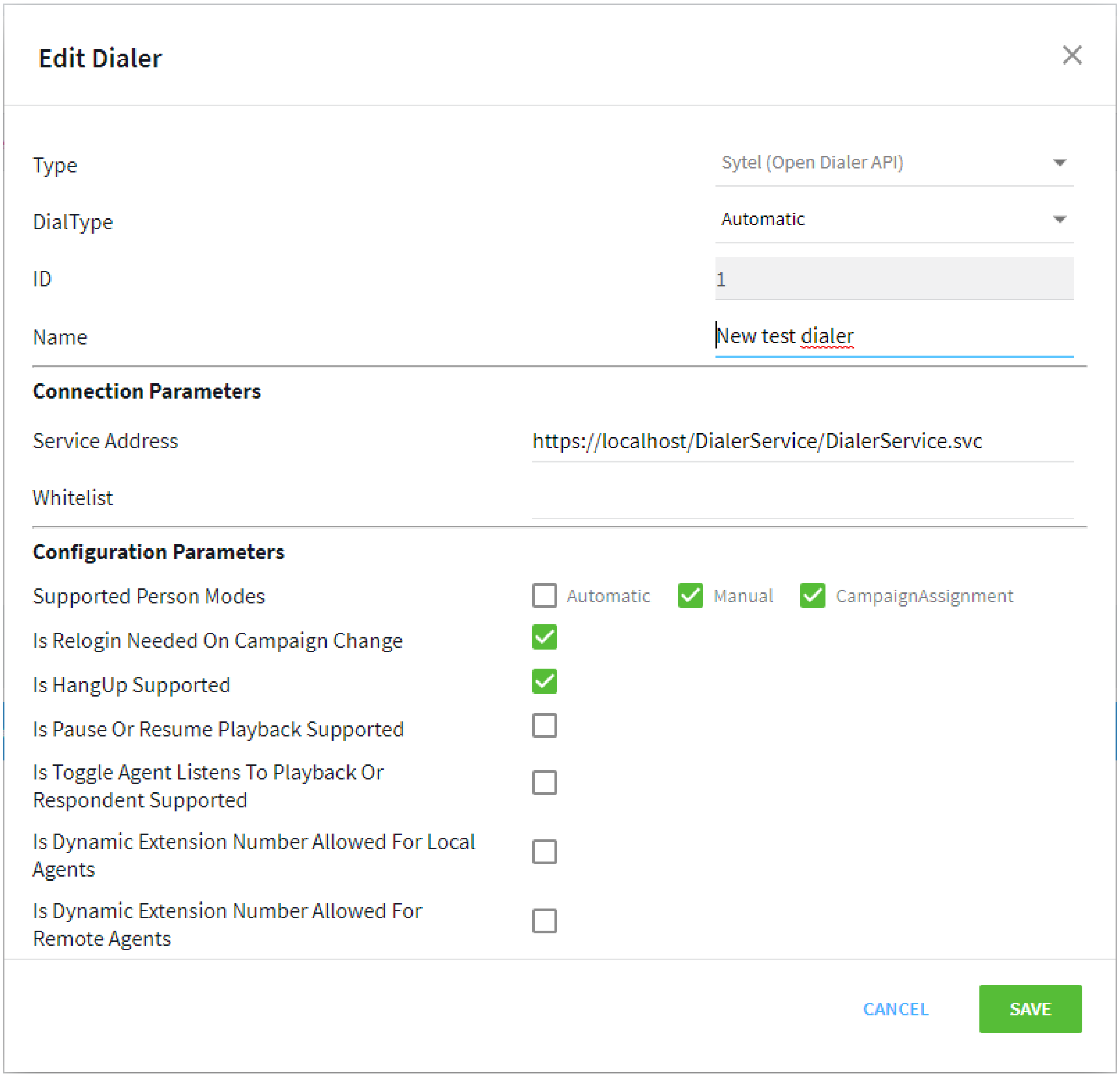


Figure 342

2. The dialog is displayed showing the dialer parameters. You should be familiar with the dialer features before introducing changes to these settings.
3. Edit the settings as required.
4. Click the Save button when you are done. The CATI system checks settings for validity. If they are valid, the dialer is added to the dialer list. If not - the system displays a warning message listing all errors. Correct errors and try again then.

8.3.7. Deleting a Dialer

The supervisor with the 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. First you should disconnect and deactivate the dialer you are going to delete it from the system (see (go to To disconnect or to disconnect/deactivate the dialer on page 363 for more information) for instructions). When the dialer state is indicated in the list of dialers as "Disconnected and deactivated" you can proceed with deletion of this dialer.

2. Select the dialer you want to delete and choose the Delete dialer button on the toolbar. Alternatively you can right-click the required dialer in the dialer list in the top frame and choose Delete from the context menu. The system will ask you to confirm the action. Confirm the deletion to remove the dialer from the system.

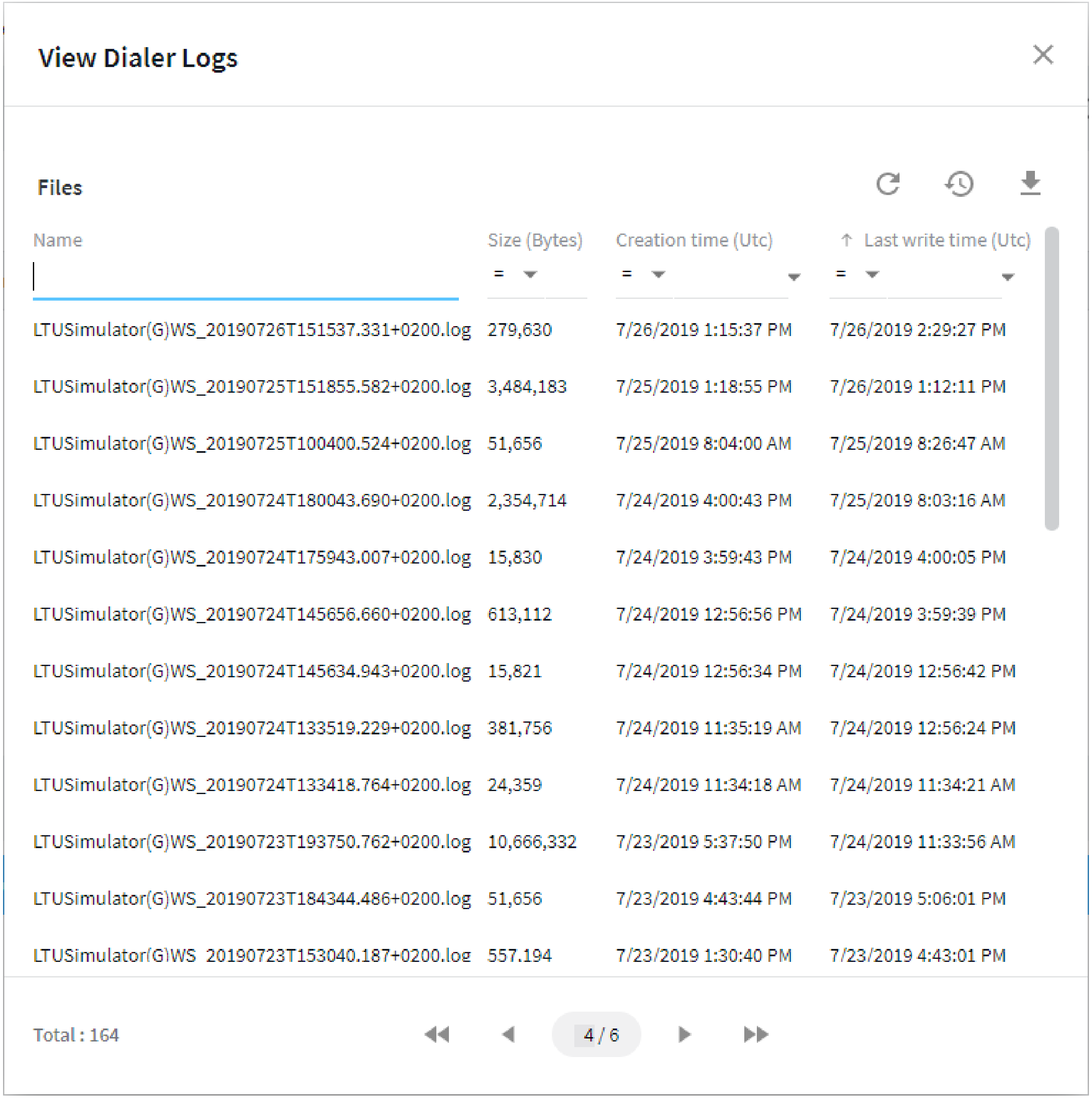
8.3.8. Viewing Dialer Logs

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. Choose the Dialer tab in the Resources section in the left frame and 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 that appears.

   This will display the View Dialer Logs window.



Name	Size (Bytes)	Creation time (Utc)	Last write time (Utc)
LTUSimulator(G)WS_20190726T151537.331+0200.log	279,630	7/26/2019 1:15:37 PM	7/26/2019 2:29:27 PM
LTUSimulator(G)WS_20190725T151855.582+0200.log	3,484,183	7/25/2019 1:18:55 PM	7/26/2019 1:12:11 PM
LTUSimulator(G)WS_20190725T100400.524+0200.log	51,656	7/25/2019 8:04:00 AM	7/25/2019 8:26:47 AM
LTUSimulator(G)WS_20190724T180043.690+0200.log	2,354,714	7/24/2019 4:00:43 PM	7/25/2019 8:03:16 AM
LTUSimulator(G)WS_20190724T175943.007+0200.log	15,830	7/24/2019 3:59:43 PM	7/24/2019 4:00:05 PM
LTUSimulator(G)WS_20190724T145656.660+0200.log	613,112	7/24/2019 12:56:56 PM	7/24/2019 3:59:39 PM
LTUSimulator(G)WS_20190724T145634.943+0200.log	15,821	7/24/2019 12:56:34 PM	7/24/2019 12:56:42 PM
LTUSimulator(G)WS_20190724T133519.229+0200.log	381,756	7/24/2019 11:35:19 AM	7/24/2019 12:56:24 PM
LTUSimulator(G)WS_20190724T133418.764+0200.log	24,359	7/24/2019 11:34:18 AM	7/24/2019 11:34:21 AM
LTUSimulator(G)WS_20190723T193750.762+0200.log	10,666,332	7/23/2019 5:37:50 PM	7/24/2019 11:33:56 AM
LTUSimulator(G)WS_20190723T184344.486+0200.log	51,656	7/23/2019 4:43:44 PM	7/23/2019 5:06:01 PM
LTUSimulator(G)WS_20190723T153040.187+0200.log	557,194	7/23/2019 1:30:40 PM	7/23/2019 4:43:01 PM

Figure 343

2. The list in the window contains the following information presented in columns:

- 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 will be downloaded into a location specified for browser downloads. This is a zipped text file in ASCII format.

4. You can refresh the dialer log file list when required by pressing 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 provides an ability to set up way to 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 for interviewer time to be counted separately for the respective types. When defining custom classifications each break type should be specified as either a paid or unpaid break. separately count the time spent by interviewers on taking a paid and unpaid breaks. Each time the interviewer goes on a break they will be prompted to choose the applicable classification via the break button in the CATI Interviewer Console (see (go to Taking a Break on page 281 for more information)). The supervisor can add new break classifications at any time or edit/delete any existing break type.

Break types are presented as a grid with the following information in columns (see the illustration below):

- *ID* - ID of a break;
- *Name* - break name;
- *Description* - optional description of a break. It is displayed as a tool tip when the interviewer hovers a mouse over the break name in the drop-down Take Break menu in the CATI Interviewers Console;
- *Type* - type of break: can be either Paid or Unpaid.

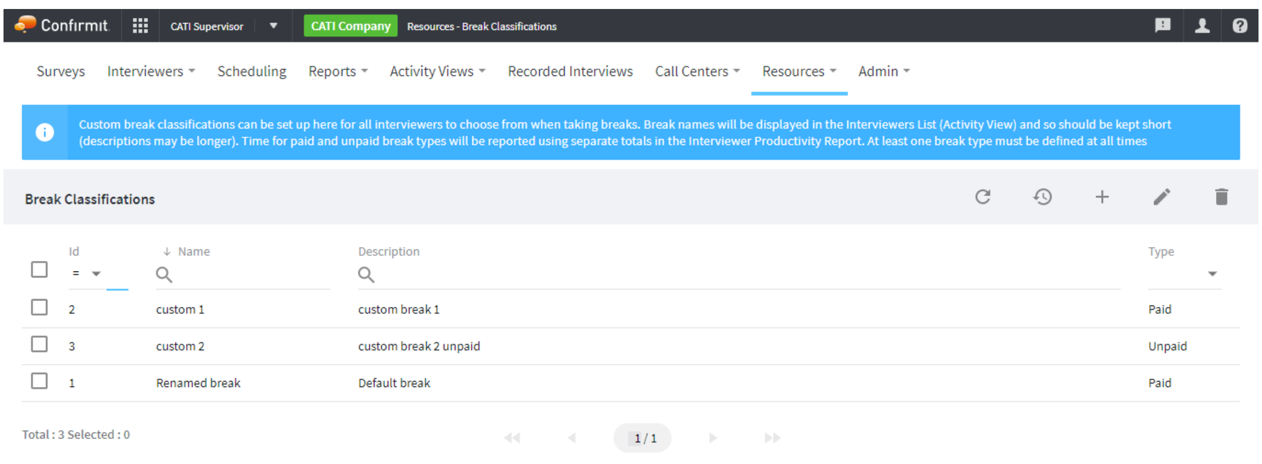


Figure 344 The Break Classifications list

Totals for the paid and unpaid break timings are calculated and reflected separately in the Interviewer Productivity report (see (go to Generating the Interviewer Productivity Report on page 417 for more information)).

The timings of breaks against the respective classifications can be obtained by exporting the call history data (this can either be done manually by right clicking on a survey and choosing 'Call History Export' or programmatically by using the CATI REST based API).

Note that if any type of break 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. Choose the Resources tab in the Navigation menu and then choose Break Classifications from the drop-down list. This will display the Break Classification list in the top frame.

2. Choose the Add button in the frame toolbar or right-click any row in the grid and choose the Add command from the shortcut menu that appears. This will display the Add Break Classification dialog.

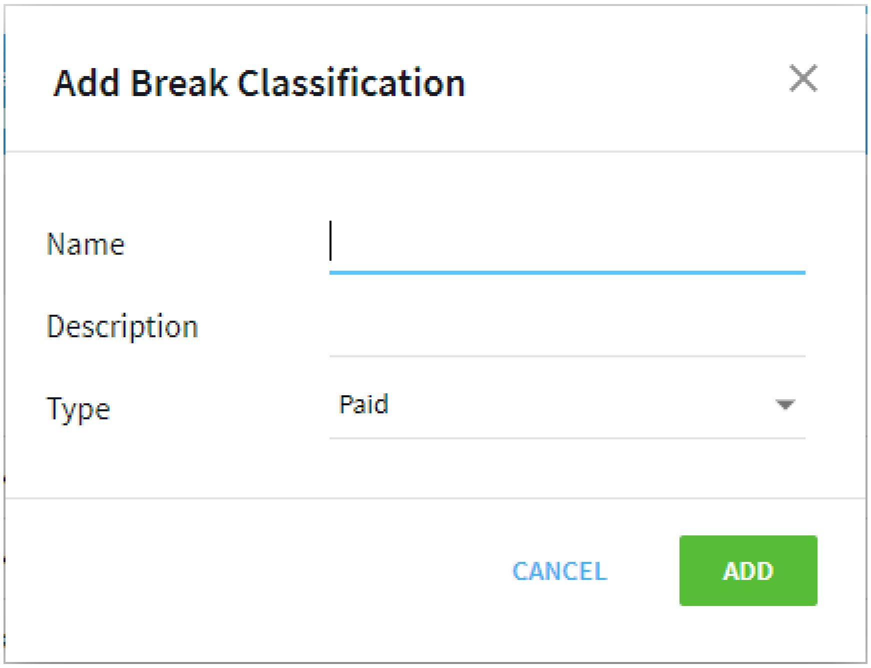


Figure 345 Adding break classification

3. Enter the required information. It is recommended to keep break names short since 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 (where horizontal space is quite limited). If necessary consider using acronyms to shorten break names and then provide longer descriptions in the description field so that the interviewer can learn more about the various options by hovering the mouse over them in the break selection menu.

   Click Add when you are finished. A new break type is added to the Break Classification list.

To edit a break type:

1. Choose the Resources tab in the left navigation frame and then choose Break Classifications. This will display the Break Classification list in the right frame.

2. Choose a break type in the list. Then choose the Edit button in the frame toolbar or right-click any row in the grid and choose the Edit command from a shortcut menu that appears. This will display the Edit Break Classification dialog.

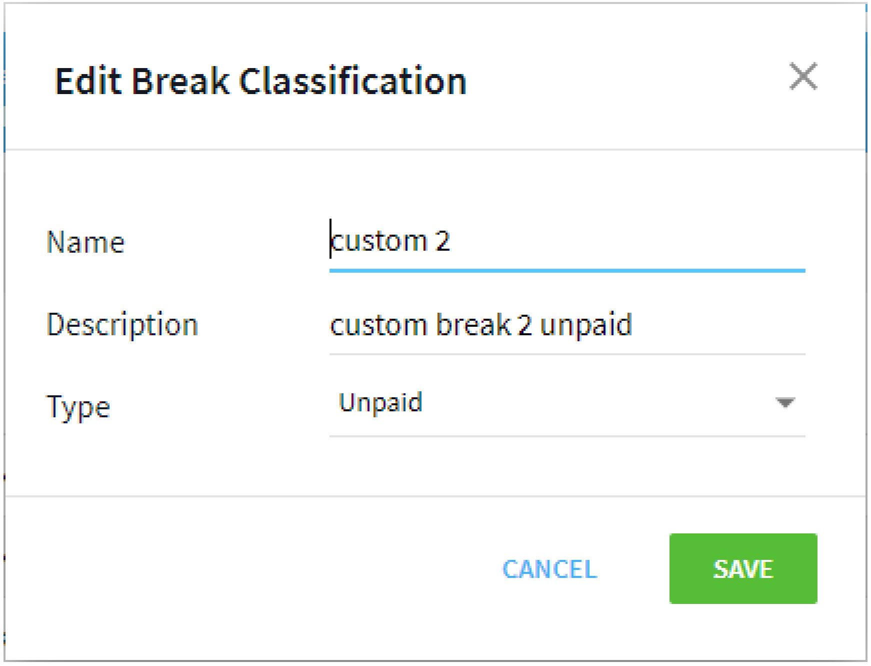


Figure 346 Editing break classification

3. Enter the required information. It is recommended to keep break names short since 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 (where horizontal space is quite limited).

   Click Save when you are finished. The break type information is updated in the Break Classification list.

To delete a break type:

1. Choose the Resources tab in the left navigation frame and then choose Break Classifications. This will display the Break Classification list in the right frame.
2. Choose a break type in the list. Then choose the Delete button in the frame toolbar or right-click any row in the grid and choose the Delete command from a shortcut menu that appears. This will display the prompt informing you that if any type of break 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.

   Choose Delete if you want to proceed with deleting a break type. The break type is then deleted from the list.

8.5. Configuring Settings Related to Inbound Calls

Note that the feature described in this topic is available only in case the Inbound Call processing is available for the current company, e.g. when a corresponding add-on is enabled.

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, see the picture below.

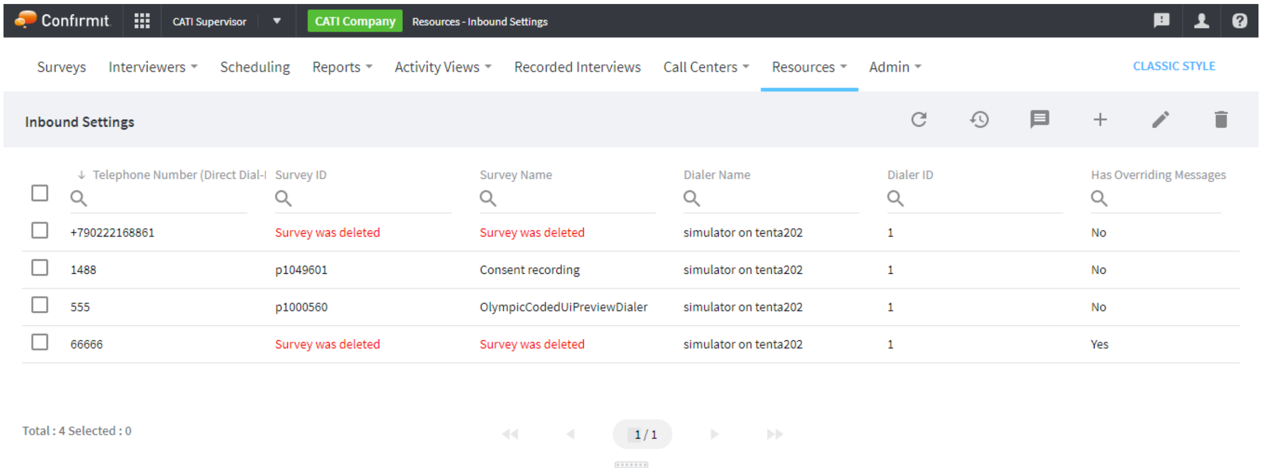


Figure 347 List of DDI numbers

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.

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** - an indication of the fact that some on-hold messages exist that have been added specifically for this DDI number (see (go to On-hold Messages Played to Calling Respondents on page 381 for more information)).

Supervisor 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 are played back only for instead of those specified as "Default" in the Default On-Hold Messages list);
- delete a DDI number from the list;

In addition, Supervisor can configure messages that will be played to a respondent when the system starts processing their call. Since in most cases the calling 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. Please turn to (go to On-hold Messages Played to Calling Respondents on page 381 for more information) for information regarding the On-Hold messages.

To add a DDI number:

1. Click the Add DDI number button + in the frame toolbar. Or you can right-click any row in the table if it has any information and choose "Add DDI number" from the context menu that appears. This will display the "Add DDI number dialog".

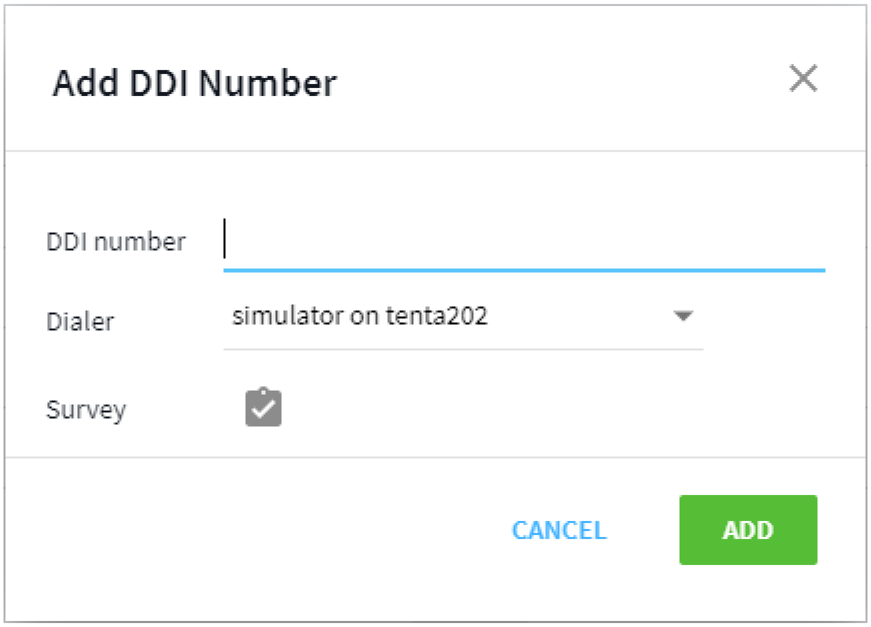


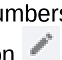
Figure 348 Adding DDI number to the list

2. Enter the DDI number in the DDI number field. Then choose a dialer from those available for your company.

   Next choose an inbound survey - click the Select Survey button  - this displays the "Add Survey" dialog (refer to (go to The Select Survey dialog on page 83 for more information) for description of the procedure).

3. Click the Add button when you have selected an inbound survey. This will close the "Add DDI number" dialog and display the selected parameters as a row in the top frame.

To edit information related to a DDI number currently on the list:

1. First select a row in the list of DDI numbers containing information related to the DDI number you are going to edit. Click the Edit DDI number button  in the frame toolbar, or you can right-click the selected row and choose "Edit DDI number" from the context menu that appears. This will display the "Edit DDI number dialog".

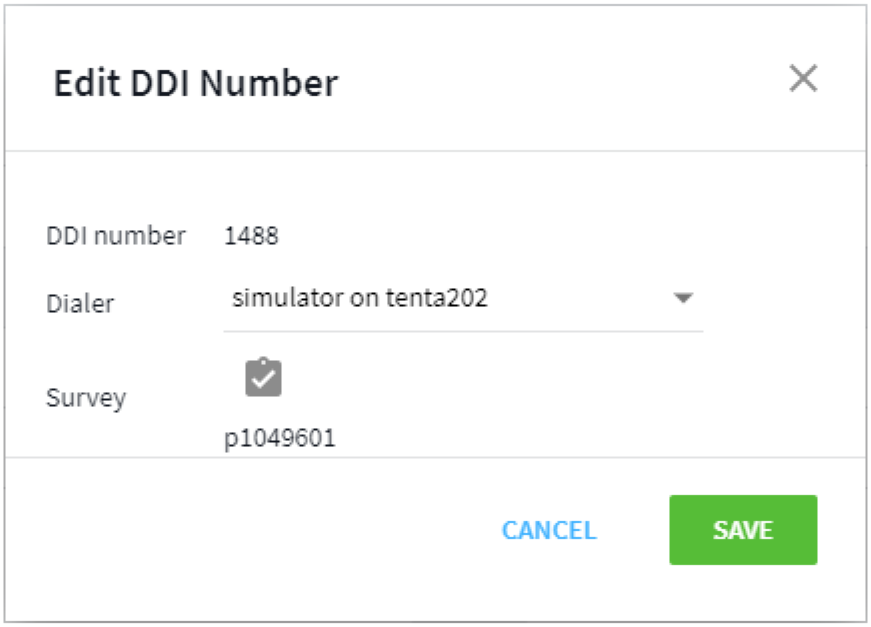


Figure 349 Editing information related to a DDI number currently on the list

2. You cannot edit a DDI number itself. Choose another dialer from the Dialer drop-down list. Click the Select Survey button to choose another survey to associate with this DDI number.
3. Click Save when you are done editing information.

To delete information related to a DDI number currently on the list:

1. First select a row, or a number of rows in the list of DDI numbers containing information related to the DDI number you are going to edit. Click the Delete DDI number button in the frame toolbar, or you can right-click the selected row and choose "Delete DDI number" from the context menu that appears. The CATI Supervisor will then display a prompt asking if you are really going to delete the selected DDI numbers.
2. Click OK to delete the selected DDI numbers.

Managing DDI specific recorded messages

1. When required, the supervisor can add a set of "overriding" on-hold messages to be played to respondents calling a chosen DDI number.

   To do so the supervisor should right-click the required DDI number in the list in the top right frame and choose "Manage DDI specific recorded messages" from the context menu that appears. This displays the list of On-Hold Messages in the bottom right frame. Refer to (go to Configuring the Overriding On-hold Messages on page 383 for more information) for instructions on how to set up overriding on-hold messages.

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 Settings Related to Inbound Calls on page 376 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 381 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 finds a corresponding survey record and creates a call for this record.

There may be different situations since for some cases the Caller ID may not be identified. If a CLI is unknown, the system, depending on how it is configured, 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.

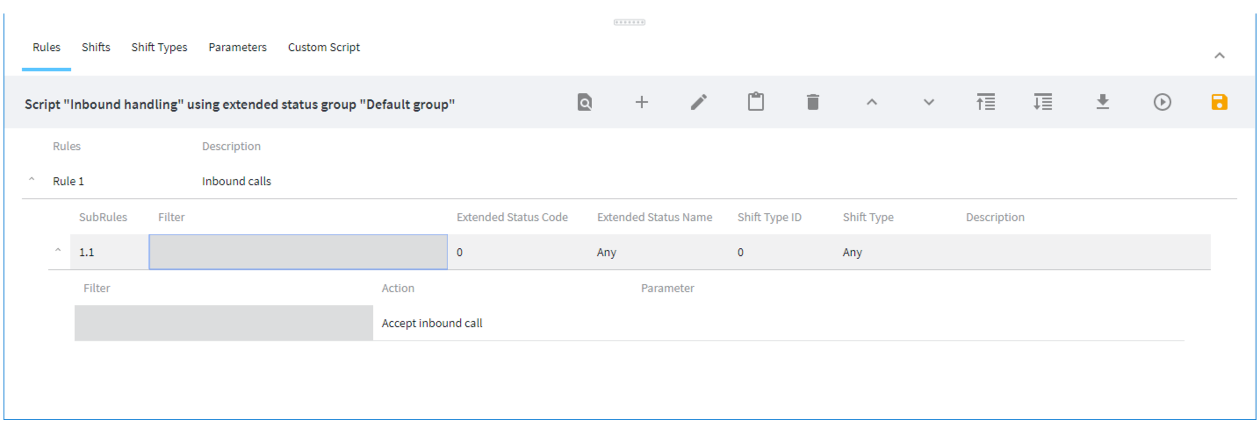


Figure 350 Example of a scheduling script for handling inbound calls

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.

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 simply puts a call in queue and it will then be delivered to an interviewer as any 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 in color and a special badge starts flashing on its right side, see (go to Inbound call handling on page 276 for more information) for details.

It should be noted that all situations when the inbound caller has to wait for his call to be connected, or drop his call are explained in the relevant audio messages which are played to the caller as soon as the situation arises. See instructions and message descriptions in (go to On-hold Messages Played to Calling Respondents on page 381 for more information).

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. Refer to a section in the CATI Administartor Manual explaining handling of the (go to Inbound Call Support using Scheduling Script on page 240 for more information) for instructions on how to set up such a routing.

Note that normally an inbound call is allowed outside of the permitted shift - it would be accepted if there is at least one interviewer available.

8.5.2. On-hold Messages Played to Calling Respondents

The Supervisor can configure messages that will be played to an inbound caller when the system starts processing their call. As in most cases the calling 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 set of "On-hold" messages that inform the calling respondent how long they have to 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 (specified audio files) are played the specified number of times - refer to the instruction below to learn how to set up this parameter. An inbound caller will hear silence in case a field is left blank.

When required, the supervisor can add and configure a set of on-hold messages that will replace the default ones for a selected DDI number.

Configuring the Default On-hold Messages

1. Choose Inbound Settings from the Resources tab (Navigation menu).
2. Select the DDI number you want to configure and click the **Manage Recorded Messages** button  on the toolbar in the right frame.

   This will display the Default On-hold Messages list in the lower-right frame.

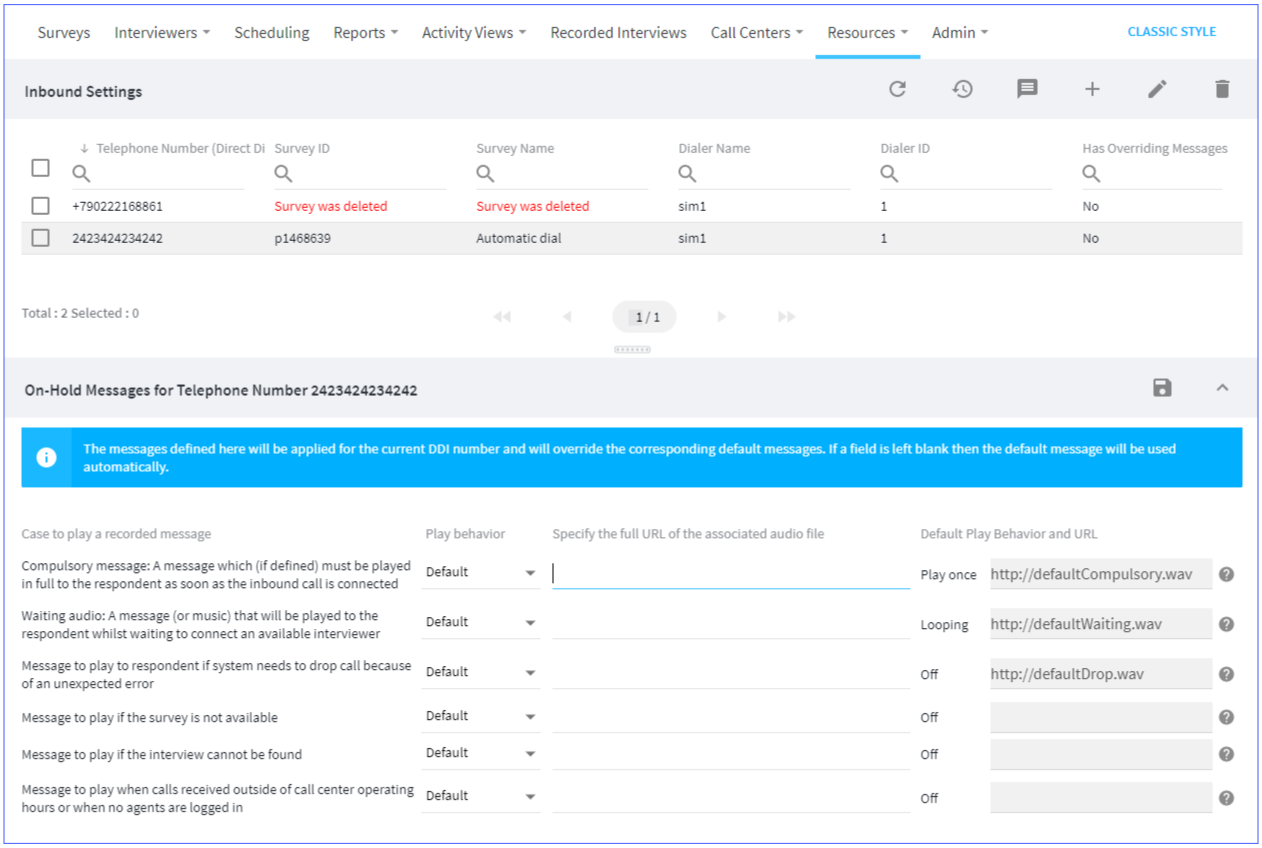


Figure 351 The Default On-hold Messages UI

3. The following messages can be set up to be produced after an inbound call has been detected.

- Compulsory message: A message which (if defined) must be played to the respondent as soon as the inbound call is connected - this is a message which (if supplied and set to play) is always played once and in full to the respondent immediately once dialer accepts 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).

  An example message: "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 whilst waiting to connect an available interviewer - this is a message that continues to play while there are no agents available to pick up the call. 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 first been played. If no compulsory message is defined, the 'waiting audio' may be played first to a calling respondent.
- Message to play to respondent if system needs to drop call because of an unexpected error - this message is played if the call needs to be dropped due to an unexpected fault.
- Message to play if the survey is not available - this message is played when:
- The survey is closed; Repetitive playback of a recorded message (audio file) 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 has to be started due to this situation. It is supposed that after that message is played an available agent can be connected and 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 that appears.

   This displays an extended On-Hold Messages dialog in the lower-right frame. The frame's title bar also indicates that this dialog is specific for the chosen 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 (see the picture below for illustration).

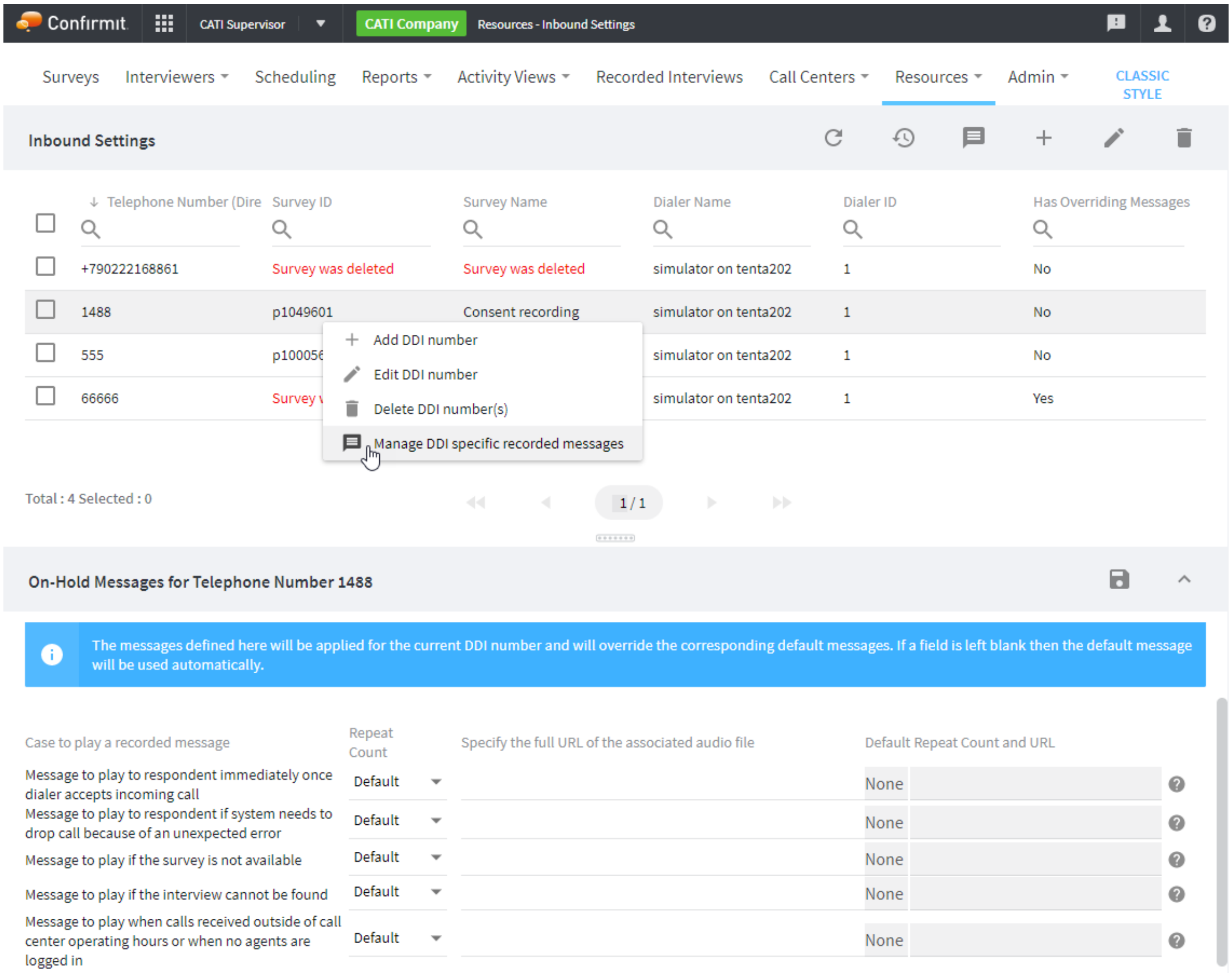


Figure 352 Configuring a DDI specific set of On-Hold Messages

2. The grayed-out message set on the right side of the frame is a default one; you should edit a set which is on the left. Follow the instructions in (go to Configuring the Default On-hold Messages on page 381 for more information) to add overriding on-hold messages.

3. When choosing a 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 amount of times specified for the default message. Repetitive playback of a recorded message (audio file) is only possible if the dialing system supports it.

4. If a file name for an overriding on-hold message is left empty it means a default message will be played instead.

5. Click the Save button on the bottom right frame toolbar to save the On-Hold Messages settings after all changes have been made.

8.6. Configuring the IVR Settings

The IVR functionality in the CATI Supervisor module allows for conducting interviews completely or partially without human agent interaction. The CATI System provides an interface for managing settings related to the IVR interviewing mode. These settings include multilingual messages that a respondent sees and hears when he makes a mistake while answering interview questions. The list of available IVR Settings is displayed in the top frame. These settings include messages in different languages which respondents hear and see when they provide answers which the system cannot recognize or in other situations. The General IVR Settings which are displayed in the bottom frame provide control over technical details. They are applied to all language settings shown in the top frame.

The illustration below shows the IVR Settings tab.

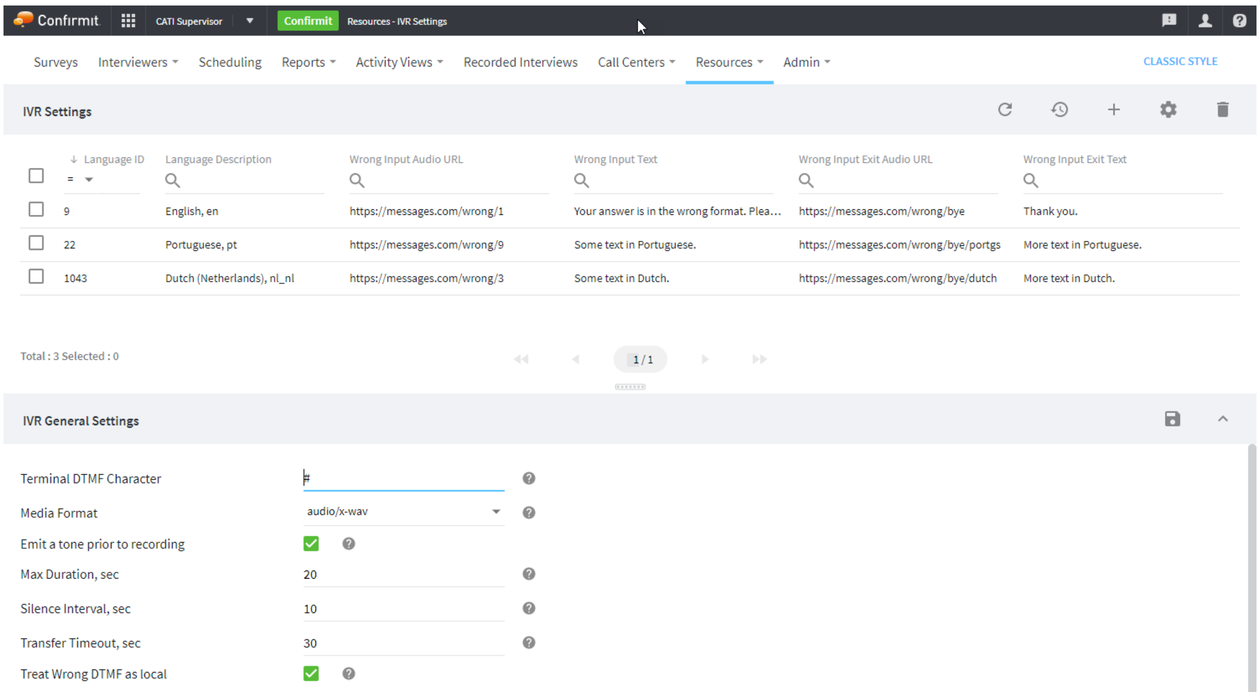


Figure 353 Resources - the IVR Settings tab

To set up multilingual messages for respondents the supervisor should prepare text and audio files containing these messages. Message texts and paths to audio files should be entered into the related columns in the grid in the top right frame.

The grid provides the following information in columns:

- 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.

The supervisor can add, edit or delete already added language IVR settings and also edit a set of IVR General Settings at any time.

To add/edit/delete an IVR setting:

1. In the left navigation frame choose the Resources object tab, then choose IVR Settings inside it. The top right frame will display the grid containing IVR settings (if any). If no IVR Settings were added, the grid 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 that appears. This will display the Add IVR Settings dialog.

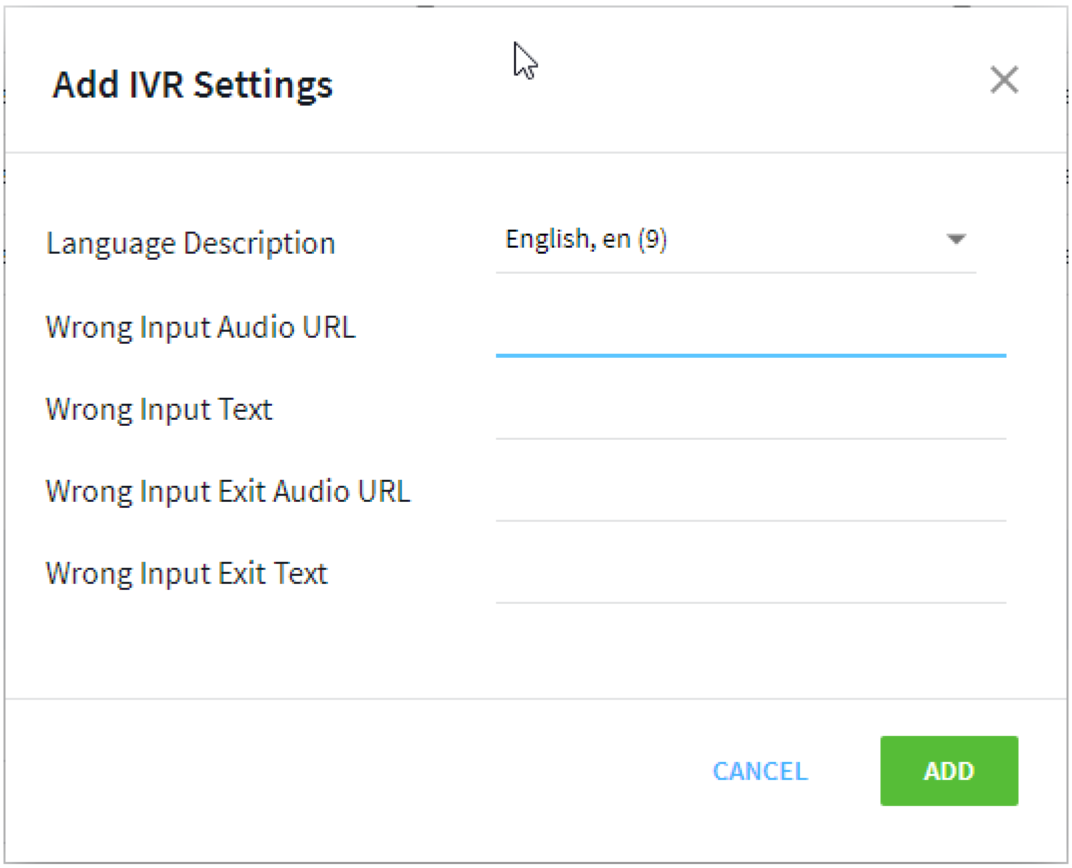


Figure 354 Adding a set of IVR Settings

Enter values in EVERY field - empty values are not accepted. When done click the Add button. The system checks the values for validity and displays warning messages if any value has incorrect format.

If the created settings are accepted, this set appears as a new row in the grid in the top right frame.

3. To edit an existing set of IVR settings select the required row in the grid 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. This will display the Edit IVR Settings dialog.

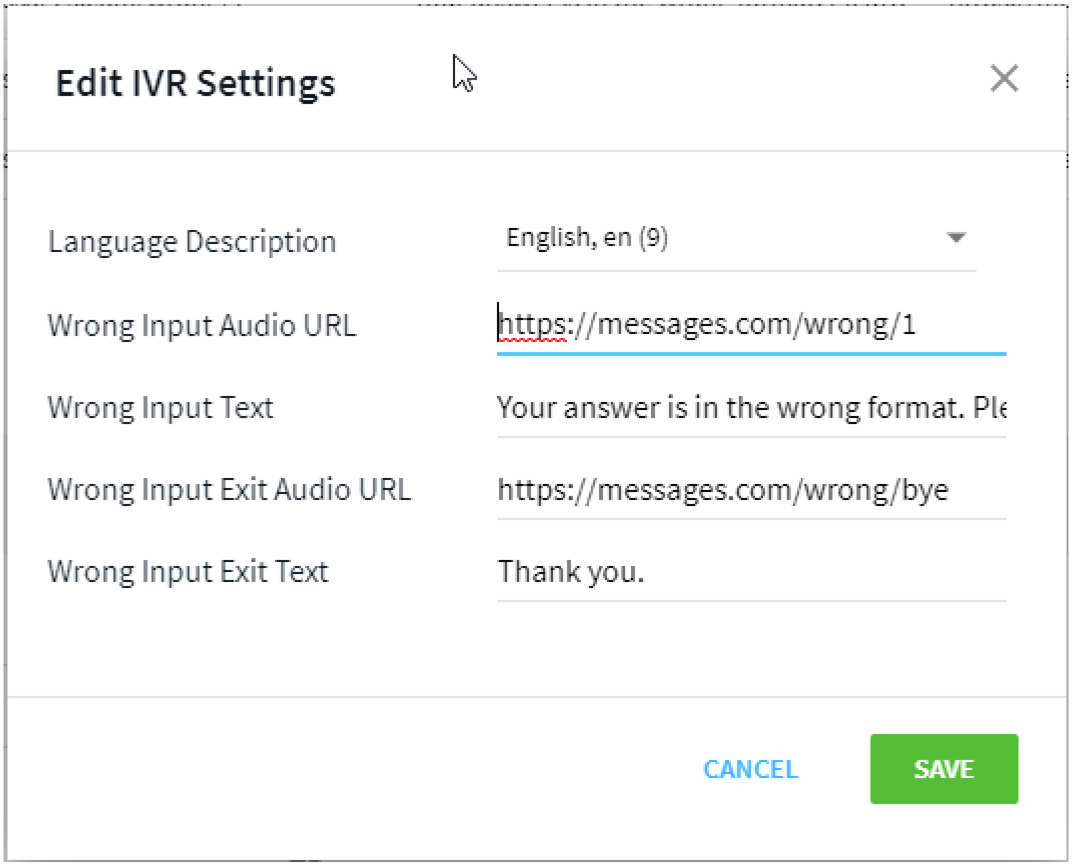


Figure 355 Editing a set of IVR Settings

When done click the Save button. The system checks the values for validity and displays warning messages if any value has incorrect format.

4. To delete a set of IVR Settings (or several sets at once) select the set(s) in the grid in the top right frame and either click the Delete IVR Setting button on the toolbar, or right-click anywhere inside the grid and choose Delete IVR Setting from the context menu that appears. The dialog box asking you to confirm the action will appear.

5. To configure General IVR settings the supervisor should enter values in the corresponding fields in the bottom right frame.

   The following fields are available:

- **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 just prior to recording ;
- **Max Duration, sec** - The maximum duration to record in seconds. A value must be a positive number;
- **Silence Interval, sec** - The interval of silence that indicates end of speech in seconds. A value must be a positive number;
- **Transfer timeout** - The timeout value (specified 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 keypress 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

For interviewers to be able to perform external call transfers the supervisor should first define external (not belonging to their company) telephone numbers and assign them to a certain survey or to multiple surveys. Then the interviewer is provided a choice of numbers to transfer a call to when they choose to perform the external call transfer.

External telephone numbers for call transfer are defined in the External Transfer section of the Resources tab - see the illustration below.

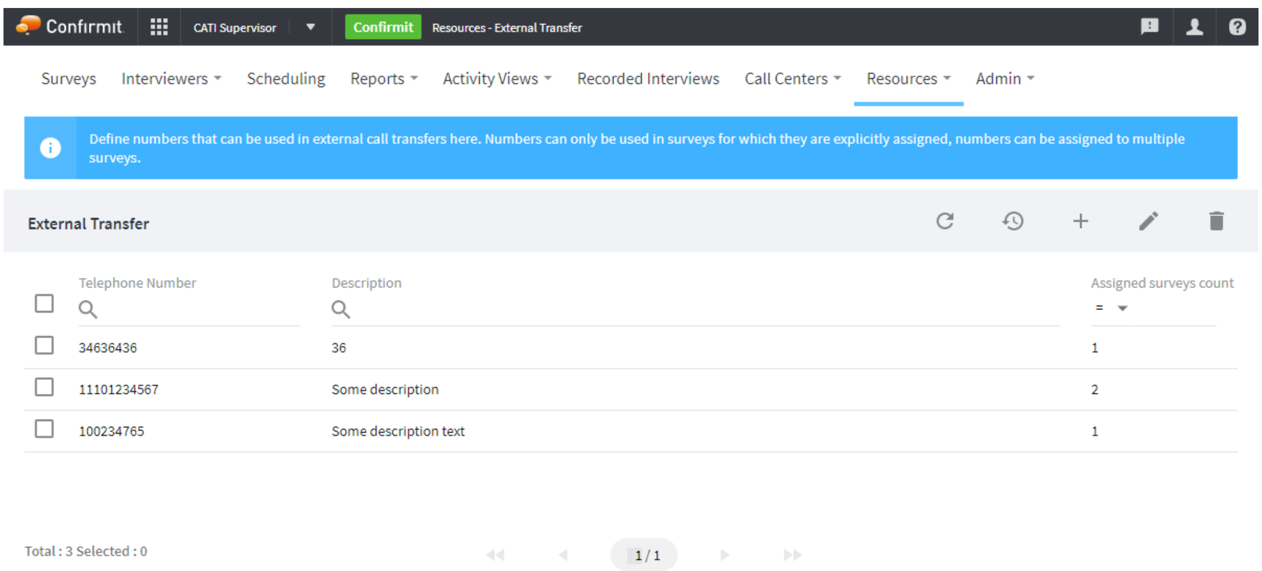


Figure 356 The External Transfer tab

To define telephone numbers for external call transfer the supervisor should specify a telephone number, description and assign some surveys to this number. Defined external telephone numbers are displayed in the top frame.

The grid in the top frame provides the following information in columns:

- 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.

The supervisor can add, edit or delete already defined telephone numbers at any time.

To add/edit/delete an external telephone number:

1. Choose the External Transfer tab in the Resources section (in the left navigation frame). A list of external telephone numbers will be displayed in the right frame.
2. Choose the Add button  on the frame toolbar, or right-click any grid row and choose Add from the context menu that appears. This will display the Add dialog.

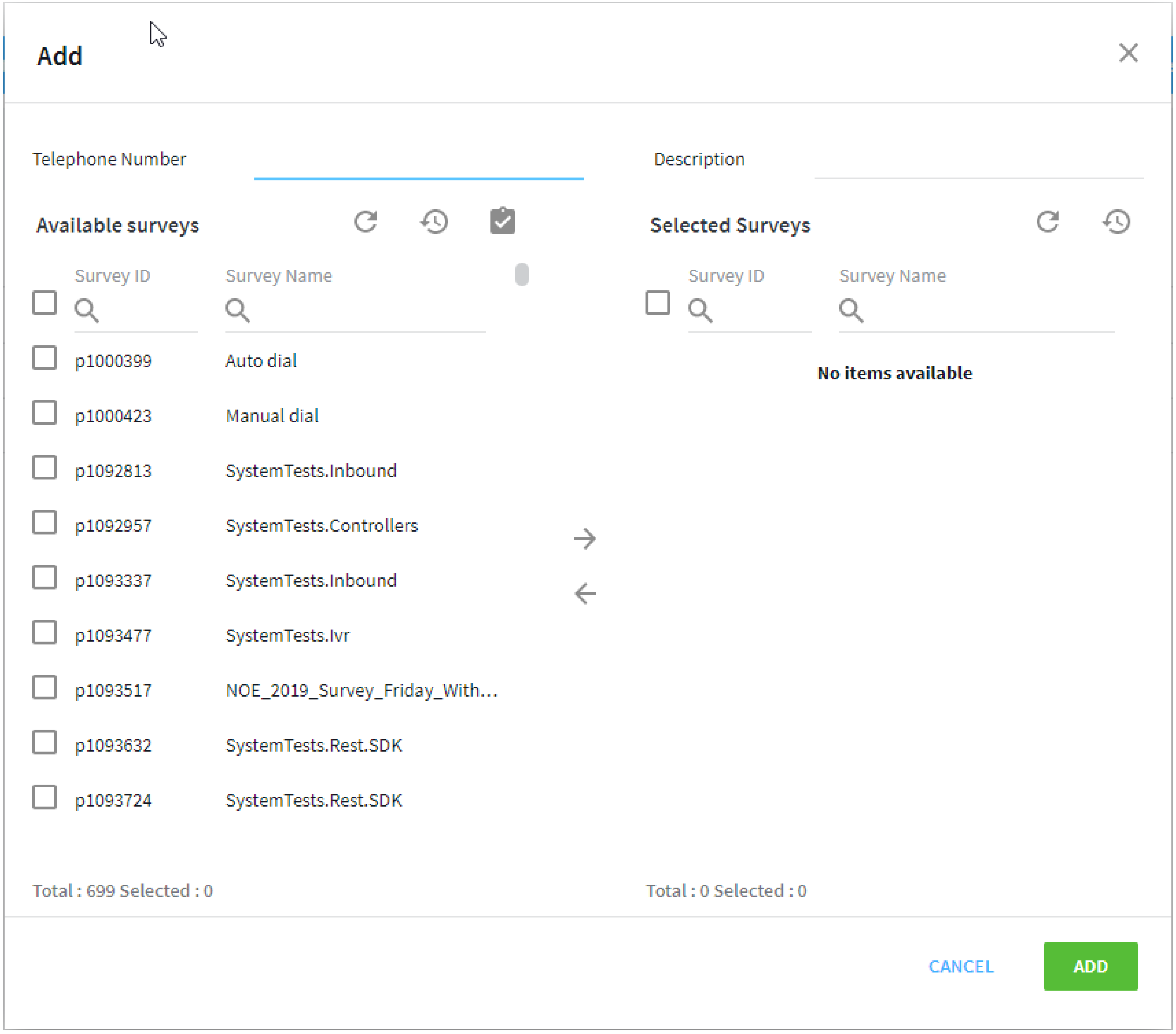


Figure 357 Adding an external telephone number

3. Enter the telephone number in the Telephone Number field. Only digits are allowed for use in this field. Do not add any other symbols or spaces to a sequence of digits. A single number only is allowed in this field.

One external telephone number can be assigned to several surveys.

It is recommended to enter an optional description of the number in the Description field.

4. Then choose one or a number of surveys in the Available Surveys pane and click the 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 choose some in the Selected Surveys pane and then click the arrow button to move them back to the Available Surveys pane.

5. Click the Add button in the bottom of the dialog to add a defined external telephone number to the list. It will then appear in the grid in the right frame.

6. To edit the list of external telephone numbers choose a telephone number in the list of External telephone numbers in the right frame and click the Properties button  on the frame toolbar or right-click this telephone number in the grid and choose Properties from the context menu. This will display the Edit dialog.

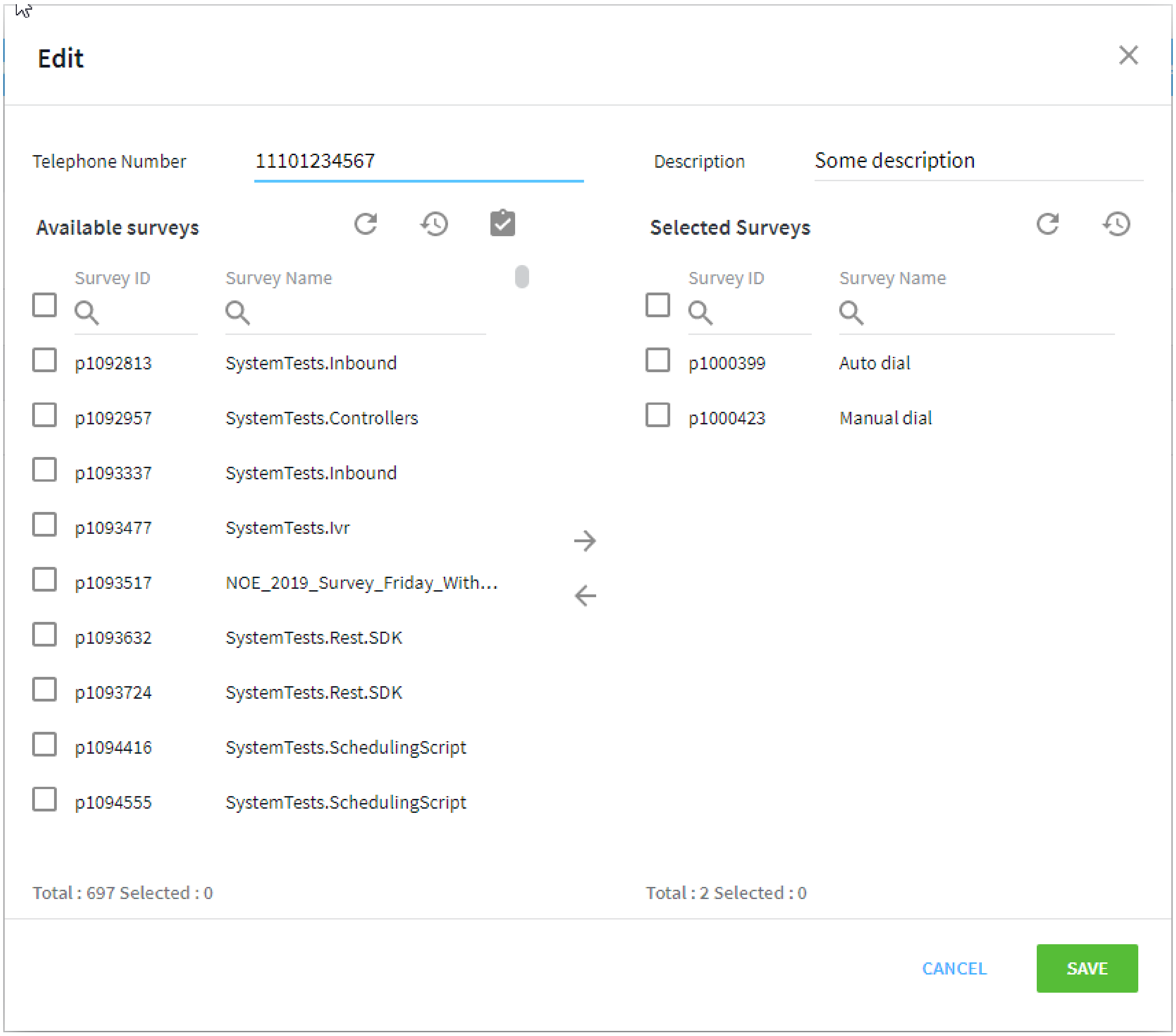


Figure 358 Editing an external telephone number

7. The Edit dialog always displays existing properties of the external telephone number. Edit any of them using the instructions above.

8. Click Save in the bottom of the dialog to confirm changes. The Edit dialog then closes and the external number in the grid is updated.

9. To delete an external number select one or more external telephone numbers in the grid and click the Delete button on the frame toolbar or right-click the selection and choose Delete from the context menu. Then click OK in the confirmation dialog to proceed with deletion.

8.8. Creating and Managing the Telephone Number Blacklist

CATI Supervisor provides a way to prevent unwanted 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.

The telephone number blacklist is available on the Telephone Blacklist tab (the Resources object tab).

To use this function you create the list by adding numbers to it, and then activate the blacklist function in Confirmit Authoring on the CATI Options tab of the Survey Settings view. To simplify the blacklist creation, you can import a file containing the telephone numbers. Note that the telephone blacklist can include a maximum of 4,000,000 telephone numbers. Refer to the appropriate section of the Confirmit Authoring manual.

The telephone number blacklist will remain in effect until it is disabled using the same procedure in Confirmit Authoring as was used to enable it, and it can be edited at any time.

The current blacklist status can be monitored in CATI Supervisor for each survey. It is displayed as a non-editable option on the General tab of the Survey Information view(go to Viewing and Modifying a Survey's General Properties on page 72 for more information).

The CATI system compares the telephone number against blacklist before a call is sent to the Interviewer's Console or to a dialer. If a telephone number matches a number on the blacklist, the number is not dialed, the corresponding 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 CATI system performs the same check whenever a fresh sample list is uploaded (this operation is performed by means of the Confirmit Authoring module, refer to the Confirmit Authoring documentation for instructions).

The count of numbers that are blocked by the Blacklist procedure at the sample loading time is logged and shown in the Sample Utilization Report in the "Blocked by blacklist" column (go to Generating the Sample Utilization Report on page 439 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 console and an interviewer could type in any telephone number, i.e. a number which is contained in the Blacklist. This case 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 464 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:

In the left navigation frame, go to the Resources object tab then choose **Telephone Blacklist**. The right frame displays a grid containing any numbers already included in the blacklist. If the blacklist does not contain any numbers, the grid will be empty.

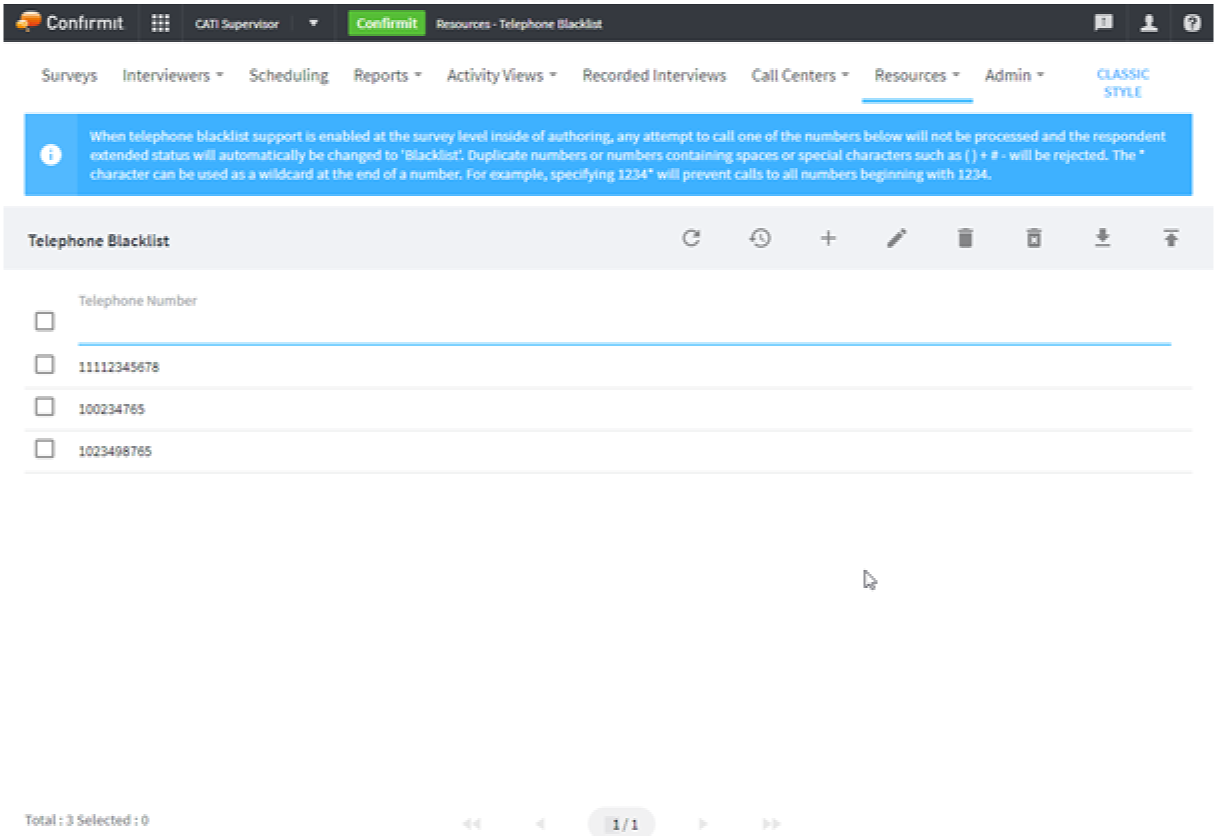


Figure 359 The Telephone number blacklist displayed in the right frame

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.

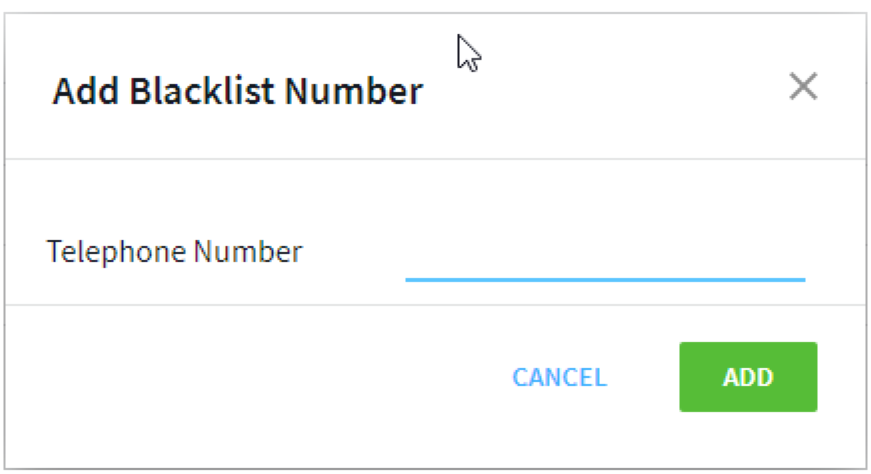


Figure 360 Adding the telephone number to the blacklist

2. Enter the 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.

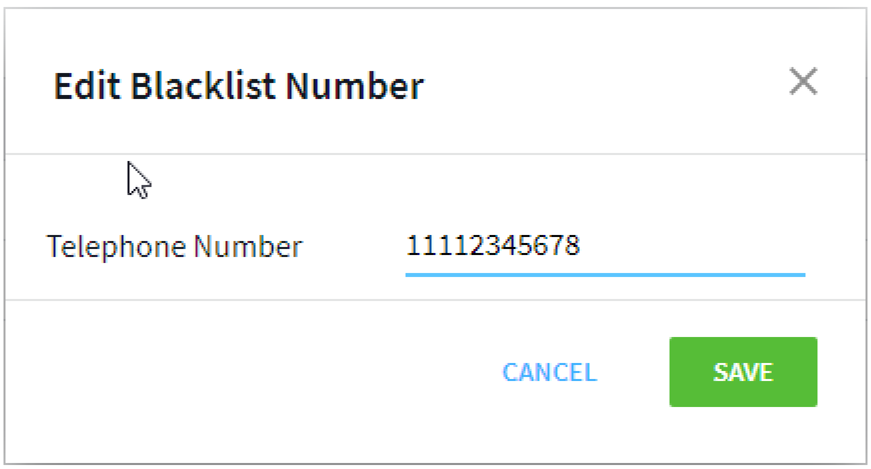


Figure 361 Editing the telephone number from the blacklist

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 a number (or several numbers) from the blacklist:

1. Select the number(s) in the grid in the right frame and either click the **Delete** button on the toolbar, or right-click anywhere inside the grid and choose **Delete** from the context menu that appears.

   A confirmation dialog appears.

2. Click **OK** to confirm deletion - the selected number(s) are removed from the blacklist.

   Click **Cancel** to cancel the number deletion.

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 refer to (go to The Security Settings Section on page 466 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 by importing a file that already contains the list of required telephone numbers. This file must be a plain text file, with all telephone numbers arranged in a single column (without a header), 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 - 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.

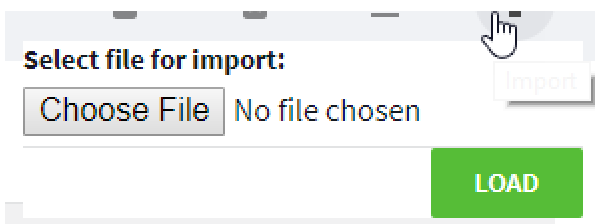


Figure 362 Importing the file containing telephone number list

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. When the path to the file is displayed in the Select file for import field, click **Load**.

   The import process is started and on completion the grid in the right frame refreshes and displays 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

Supervisor can monitor a range of tasks that were performed in the system over the certain period of time.

This action is available for any supervisor.

The "normal" supervisor has access only to the tasks pertaining to his call center, while a "ProS" supervisor can access any task that was run in any call center existing in their company

Any supervisor has the right to 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 kind of task that was (or currently being) carried out,
- Status - the current execution stage 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. In the left navigation frame choose the Resources object tab, then choose Tasks inside it. The right frame will display the grid containing tasks performed by supervisors assigned to the current call center (or to all call centers existing in the company). If no tasks have been performed yet, the grid will appear empty.

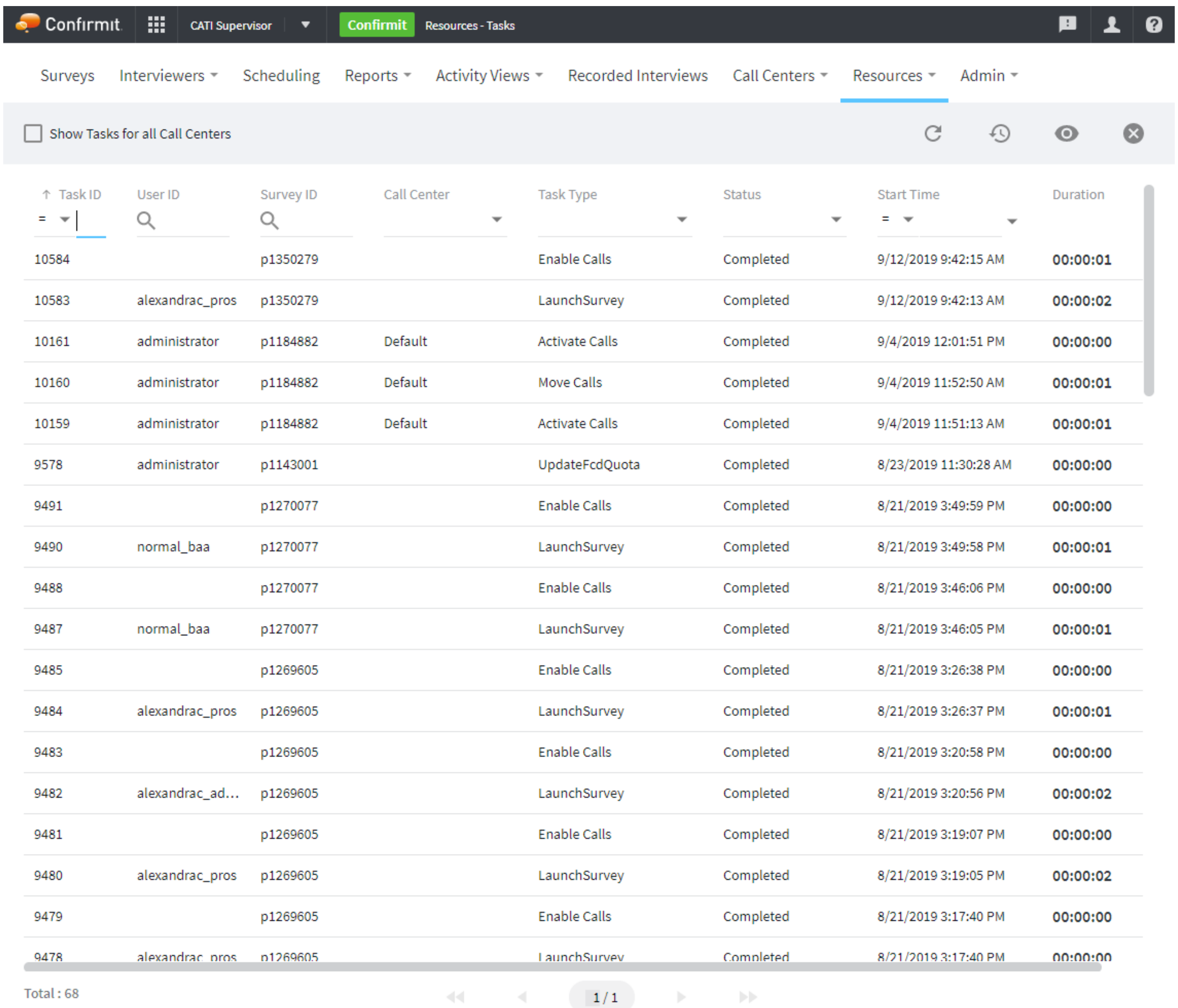


Figure 363 Watching the list of tasks performed in the current Call Center

By default the Show Tasks for all Call Centers box in the right frame toolbar is cleared which means you can see only tasks pertaining to the current call center.

When the Show Tasks for all Call Centers box is checked you can see tasks that were run in all call centers existing in the company.

2. Any supervisor can view details of the selected task. To do this they have to select a task in the list and either right-click it and choose Details from the context menu that appears, or choose the Details button on the frame toolbar.

   This will display the Task View dialog window containing three tabs: Progress, Parameters, Specific Parameters.

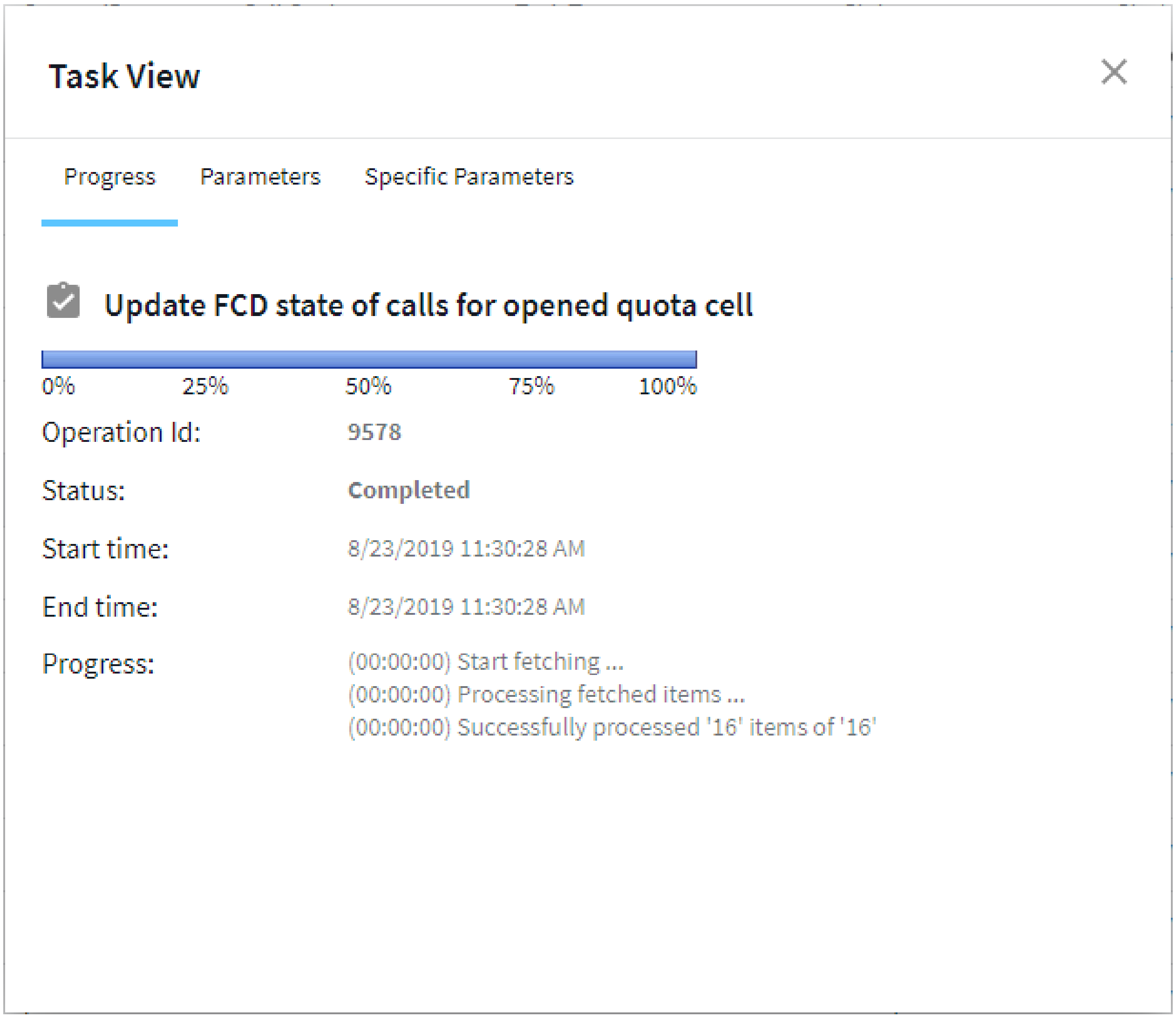


Figure 364 Task View dialog window - Progress tab

The Progress tab contains information pertaining to the task launch and progress (usually similar to what user sees in the Progress dialog window after the task is launched).

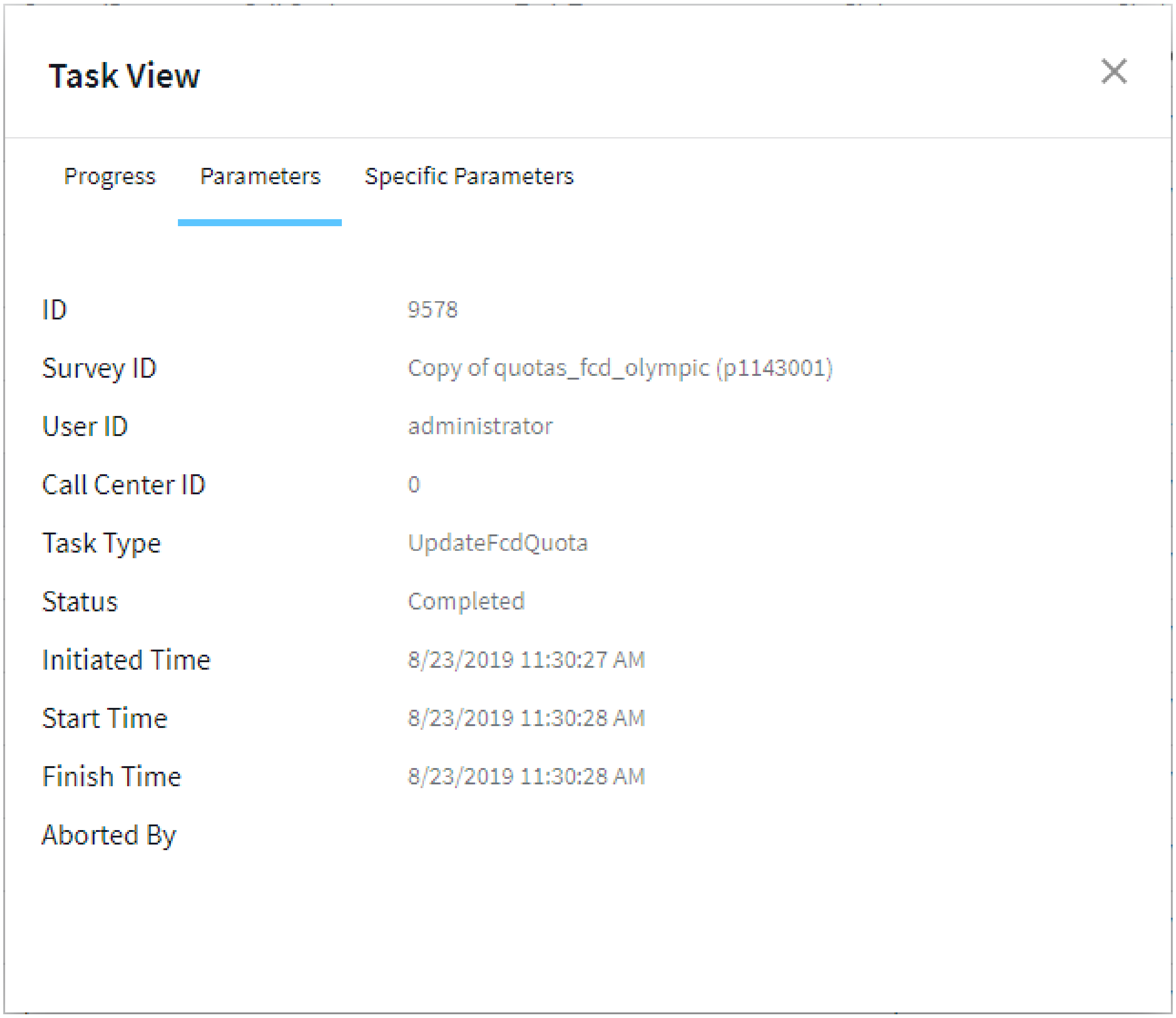


Figure 365 Task View dialog window - Parameters tab

The Parameters tab contains general task parameters.

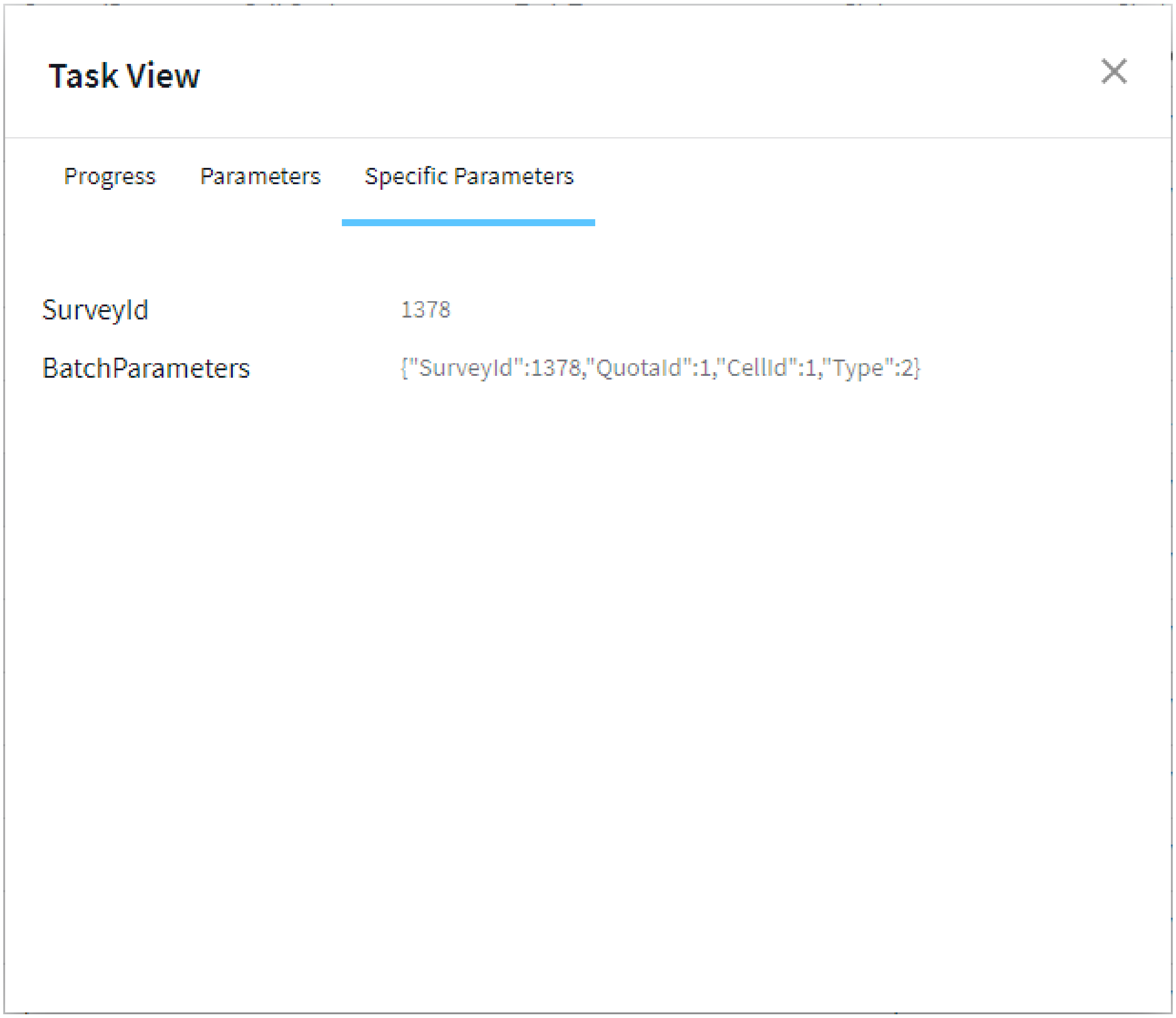


Figure 366 Task View dialog window - Specific Parameters tab

The Specific Parameters tab shows certain configuration and run parameters of the selected task.

Click the cross button in the top right corner of the dialog window to close the window.

3. Any supervisor can abort the selected task. A task can only be aborted while it is in the "Executing" status (while the Status column displays this status). To do this supervisor has to select a 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 Timezone List

Master Timezone list includes officially used timezones that are available for activation in the CATI Supervisor module, i.e. that are not directly used with any other CATI object. Supervisor can quickly select a timezone from this list and make it “active”. Active timezones can be used as object properties – for example, an active timezone can be specified as the respondent timezone. Also refer to Configuring the Active Timezone List for instructions.

For information on the bias offset for a timezone and for a complete reference list of timezones see Appendix E - Time Zone List.

When working with the Master Timezone objects you can perform the following operations:

- View the Master Timezone list;
- Make a master timezone active;
- Refresh the Master Timezone list.

8.10.1. Viewing the Master Timezone List

To view the Master Timezone list:

1. Change to the Resources tab in the Navigation menu, then choose the Master Timezone List section in the drop-down list. This will display the list of Master Timezones in the top frame of the CATI Supervisor main window.

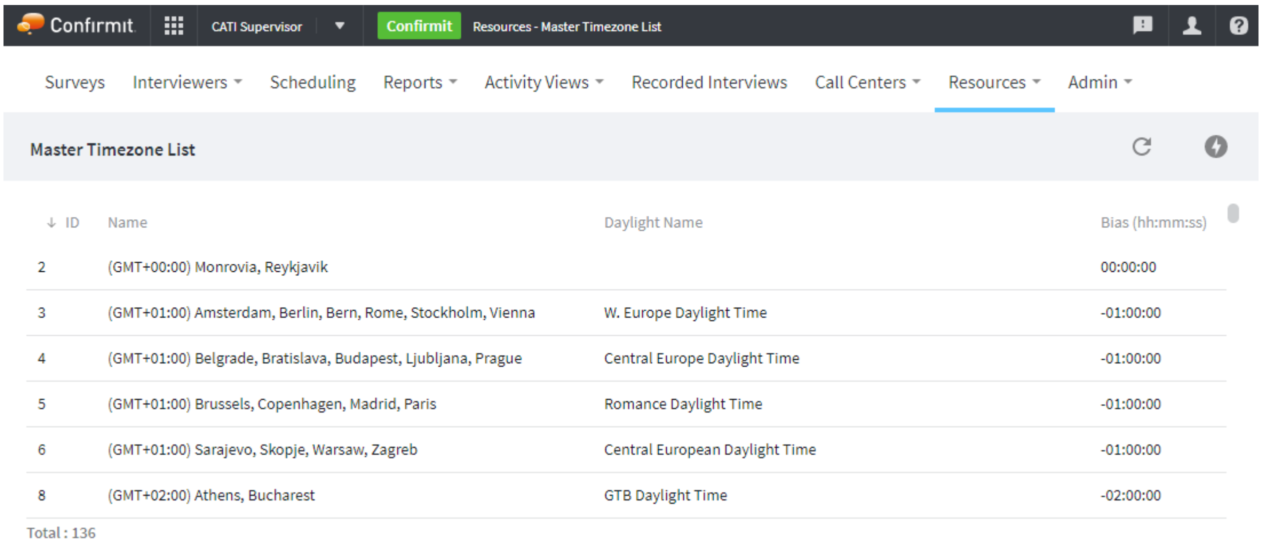
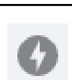


Figure 367 Viewing the Master Timezone list in the top right frame

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 Master Timezones 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 required Master Timezone List item in the grid in the top right frame and click the Activate button  on the toolbar, or right-click this item and choose Activate from the shortcut menu.
2. This will delete the activated item from the list of Master Timezones and simultaneously add it to the list of Active Timezones (see Configuring the Active Timezone List for details).
3. Repeat the procedure for other Master Timezones if required.

8.11. Configuring the Active Timezone List

Active Timezone list includes timezones that are activated, i.e. they can be directly used with any other object. Supervisor can quickly 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. Also refer to Configuring the Master Timezone List for instructions.

For information on a timezone bias and for a complete reference list of timezones see Appendix E - Time Zone List.

When working with the Active Timezone objects you can perform the following operations:

- View the Active Timezone list;
- Set an Active Timezone as local;
- Delete an Active Timezone;
- Delete all unused Active Timezones;
- 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.

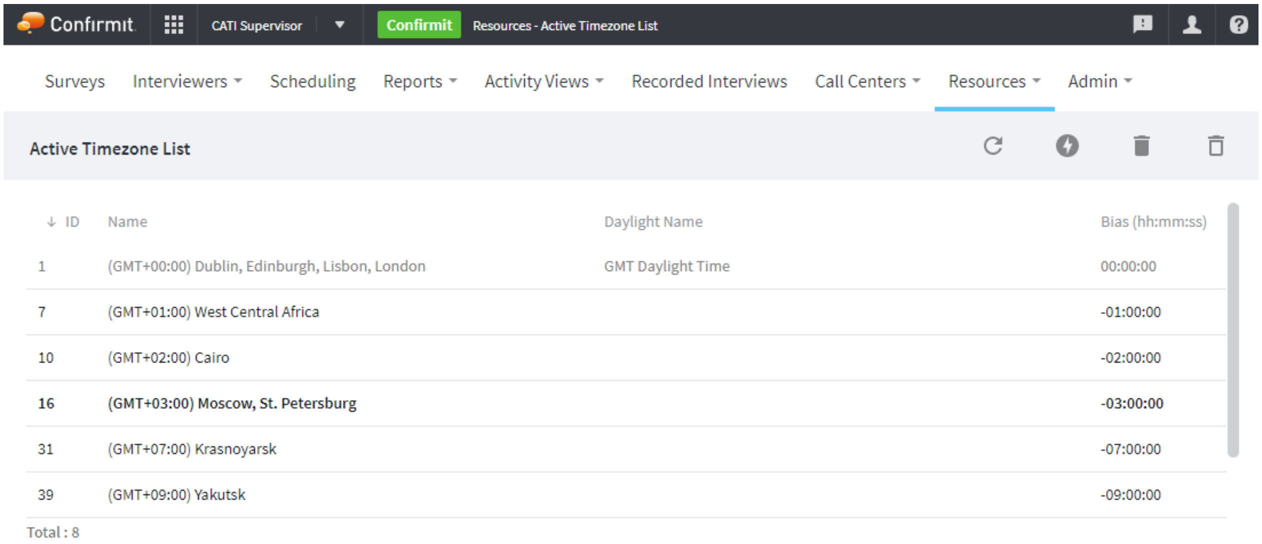


Figure 368 Viewing the Active Timezone list in the top frame

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.

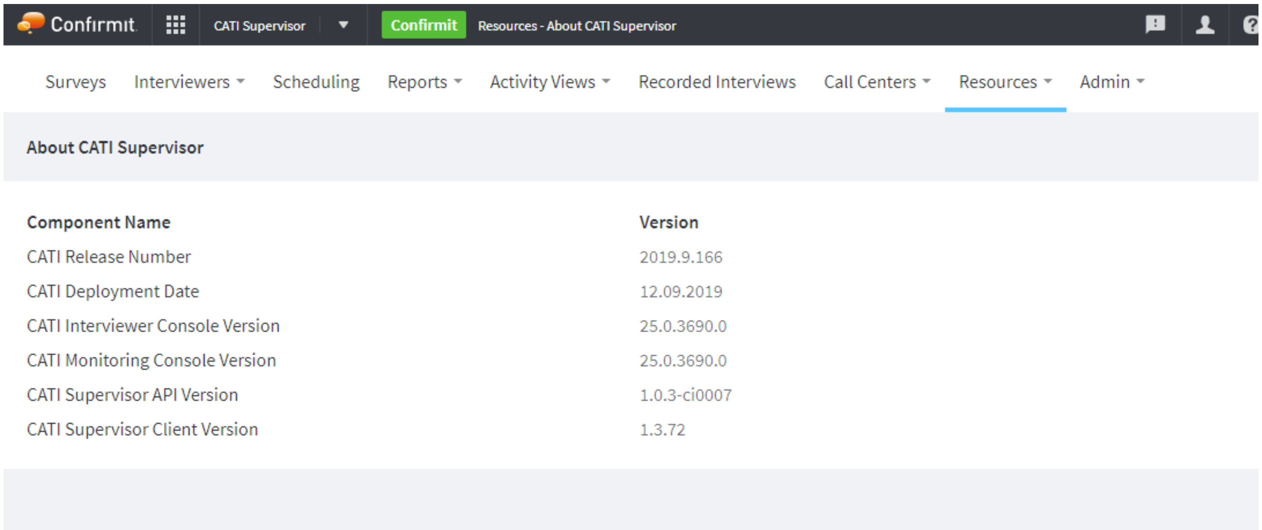


Figure 369 Viewing the general software information

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 405 for more information))
- Survey Productivity report (see (go to Generating the Survey Productivity Report on page 411 for more information))
- Interviewer Productivity (see (go to Generating the Interviewer Productivity Report on page 417 for more information))
- Interviewer Sessions (see (go to Generating the Interviewer Sessions Report on page 427 for more information))
- Sample Status Summary (see (go to Generating the Sample Status Summary Report on page 432 for more information))
- Sample Utilization report (see (go to Generating the Sample Utilization Report on page 439 for more information))
- Call Attempts Log (see (go to Viewing the Call Attempts Report on page 442 for more information))
- Quota Progress report (see (go to Generating the Quota Progress Report on page 430 for more information))
- Attempts by Disposition (see (go to Generating the Attempts by Disposition Report on page 444 for more information))
- Number of Attempts (see (go to Generating the Number of Attempts Report on page 447 for more information))
- Interviewer Submission Details (see (go to Viewing the Interviewer Submission Details Log on page 454 for more information))
- Aggregated Interviewer Submission (see (go to Generating the Aggregated Interviewer Submission Report on page 456 for more information))
- Inbound calls history report (see (go to Viewing the Inbound Call History Log on page 453 for more information))
- Inbound Call Summary (see (go to Generating the Inbound Call Summary Report on page 449 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.

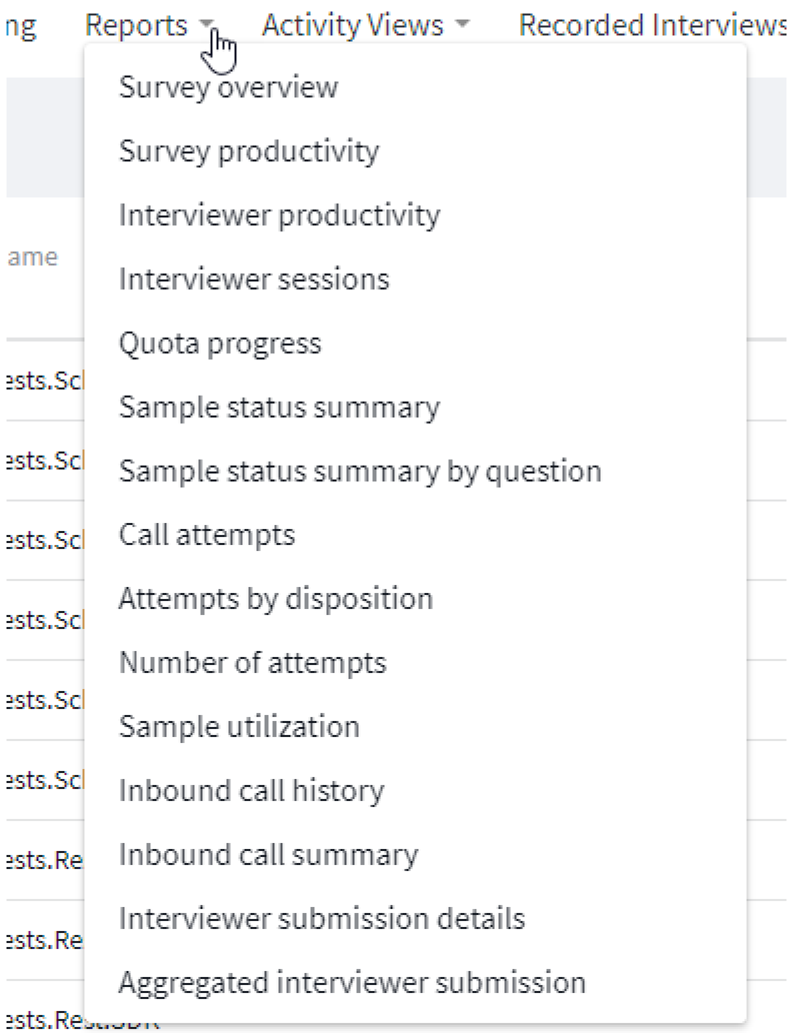


Figure 370 Selecting a report type in the Navigation menu

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).

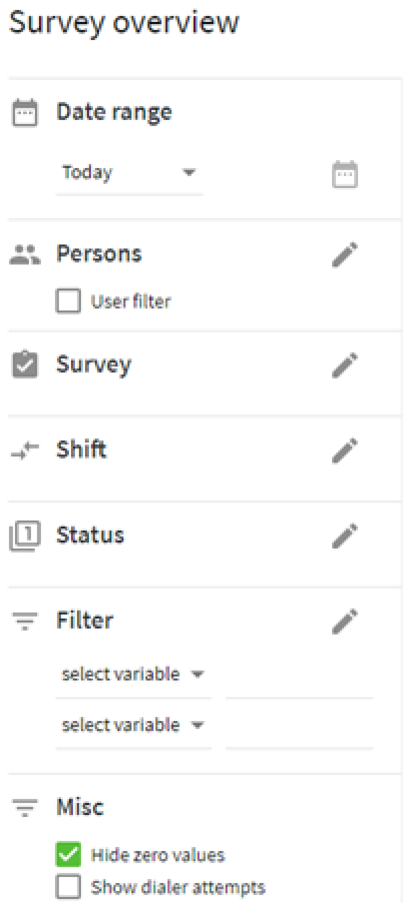


Figure 371 Configuring the Survey Overview Report

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.

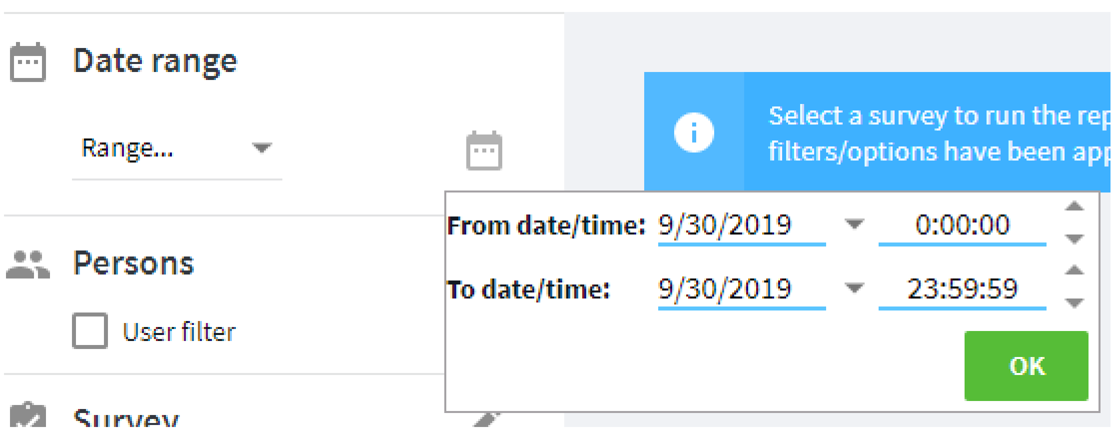


Figure 372 Choosing the date range for the Survey Overview Report

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 modal window is displayed (see the picture below).

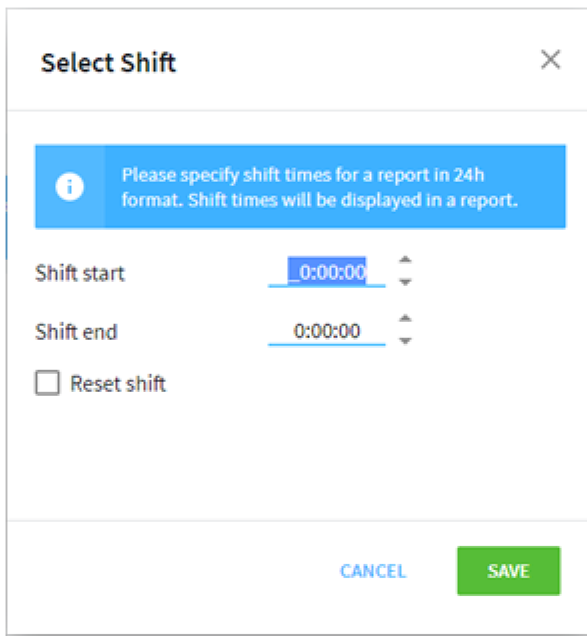


Figure 373 Choosing the Shift start and end times

   Choose the desired start and end times of the shift using corresponding spin controls.

   Click Save when you are done. The modal window 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 window. 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.

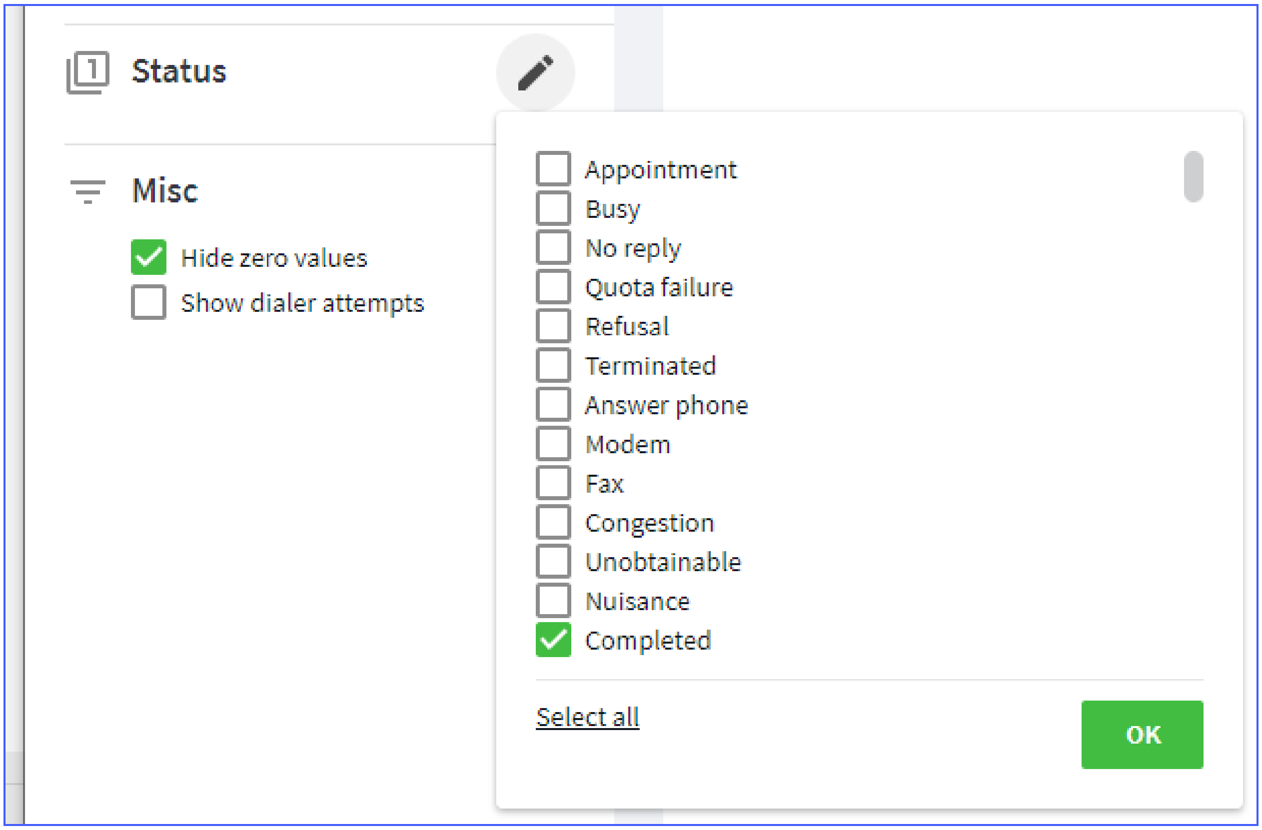


Figure 374 Selecting extended statuses to include into the Survey Overview Report

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 window (see description of this form here - Selecting Surveys to Display in the Survey List Activity View). Click Save selected in this dialog window to save this setting.
6. You can include additional statistics reflecting the amount 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 amount 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 window.

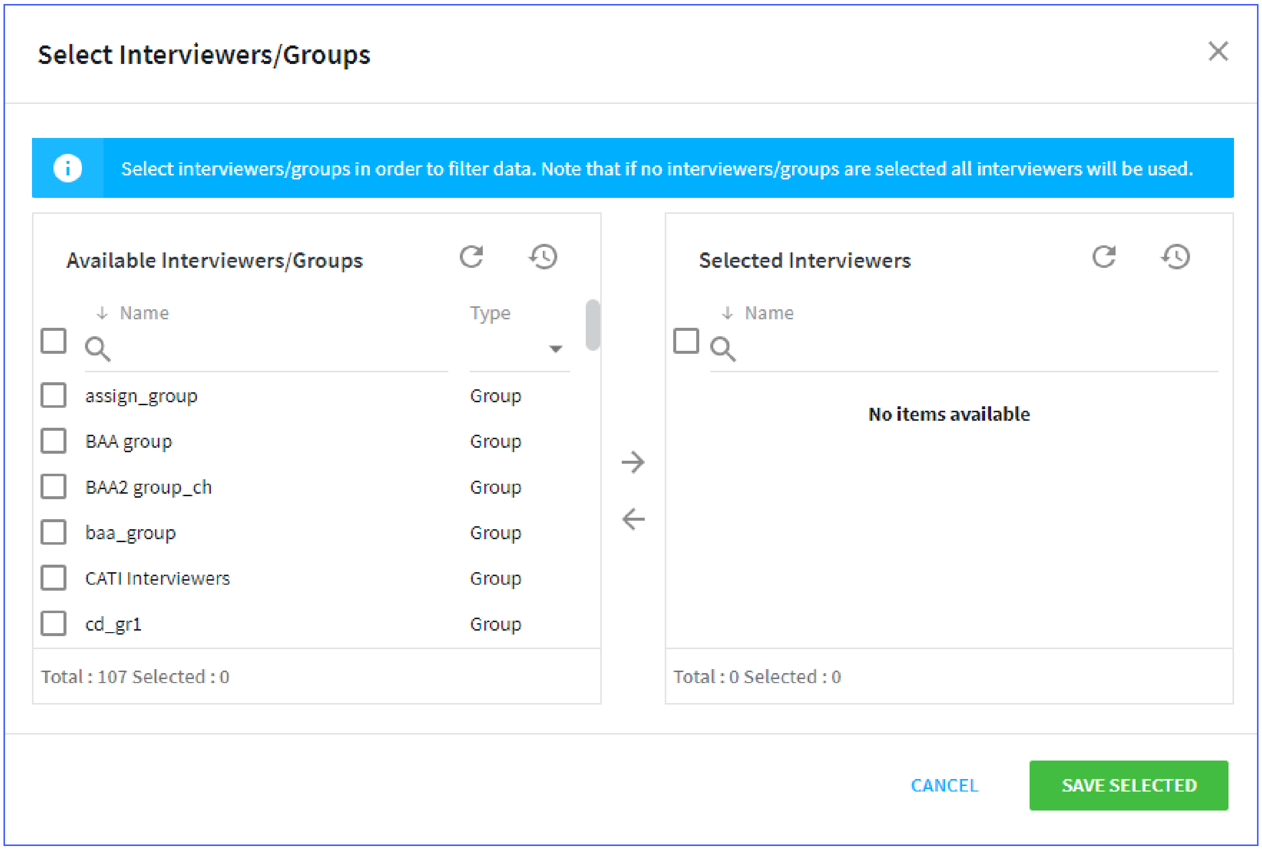


Figure 375 Selecting users to include into the Survey Overview Report

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 window 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 Confirmit Authoring module become available and can be applied using the variable filter (refer to the Confirmit 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.

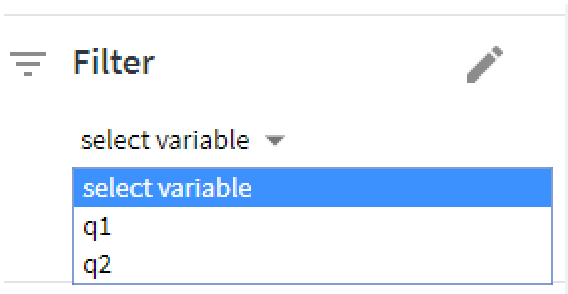
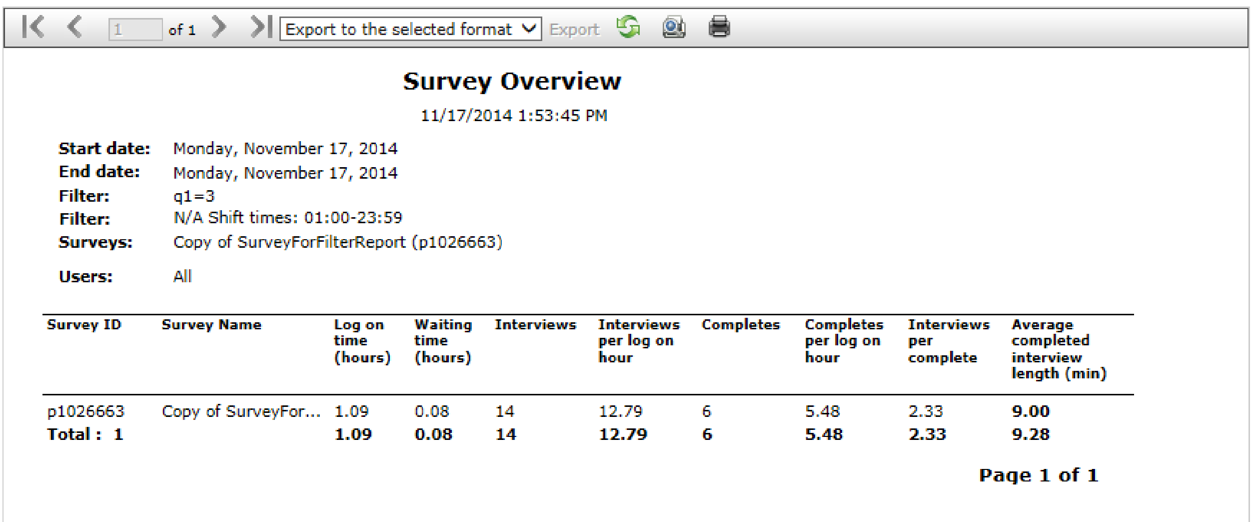


Figure 376 Choosing a variable to filter the Survey Overview report data

10. Click the Build Report button to generate the Survey Overview Report.



Survey Overview

11/17/2014 1:53:45 PM

Start date: Monday, November 17, 2014
End date: Monday, November 17, 2014
Filter: q1=3
Filter: N/A Shift times: 01:00-23:59
Surveys: Copy of SurveyForFilterReport (p1026663)
Users: All

Survey ID	Survey Name	Log on time (hours)	Waiting time (hours)	Interviews	Interviews per log on hour	Completes	Completes per log on hour	Interviews per complete	Average completed interview length (min)
p1026663	Copy of SurveyFor...	1.09	0.08	14	12.79	6	5.48	2.33	**9.00**
Total : 1		**1.09**	**0.08**	**14**	**12.79**	**6**	**5.48**	**2.33**	**9.28**

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Figure 377 The generated Survey Overview Report

11. The Survey Overview report provides the following information:

ey ID	This is the ID of the Confirmit project
ey name	This is the name of the Confirmit 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 at once.

To generate the Survey Productivity Report:

1. Choose Reports in the Navigation menu, then choose the Survey Productivity 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/Survey Productivity Report from the context menu that appears.

   This will display the Survey Productivity Report settings.

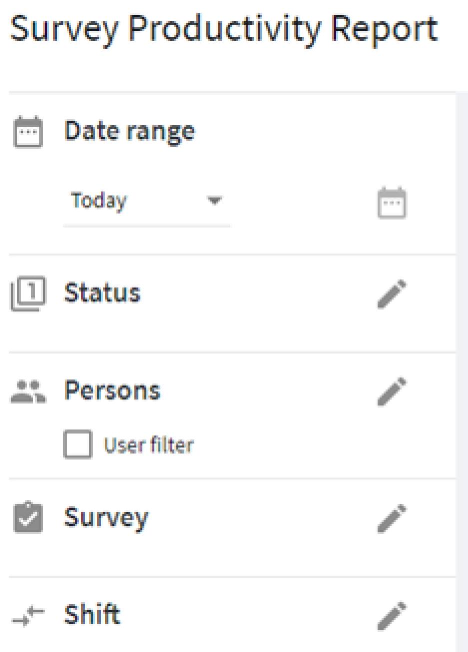


Figure 378 Configuring the Survey Productivity Report

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 window (see description of this form here - Selecting Surveys to Display in the Survey List Activity View). Click Save selected in this dialog window to save this setting.
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.

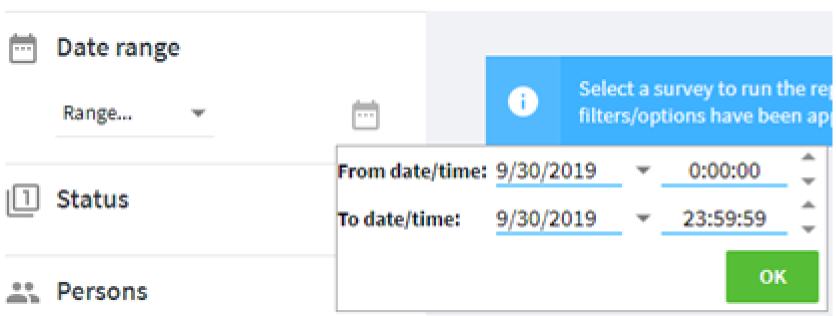


Figure 379 Choosing the date range for the Survey Productivity Report

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 Shift button to limit the 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 modal window is displayed (see the picture below).

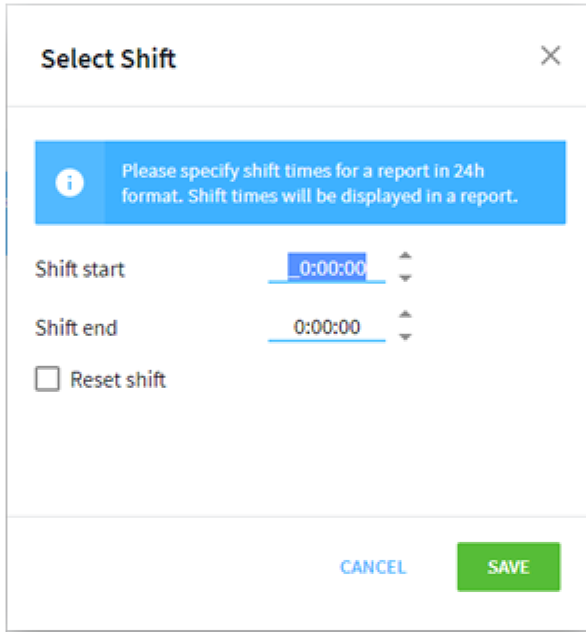


Figure 380 Choosing the Shift start and end times

   Choose the desired start and end times of the shift using corresponding spin controls.

   Click Save when you are done. The modal window 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).

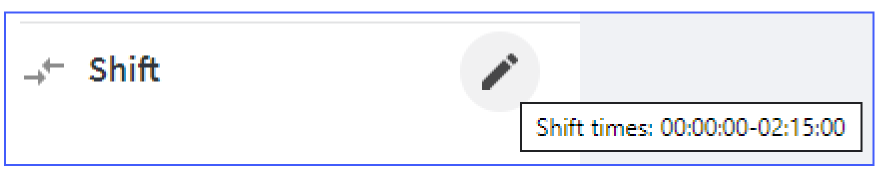


Figure 381 Checking the Shift time setting

   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 window. 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.

5. 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. 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.

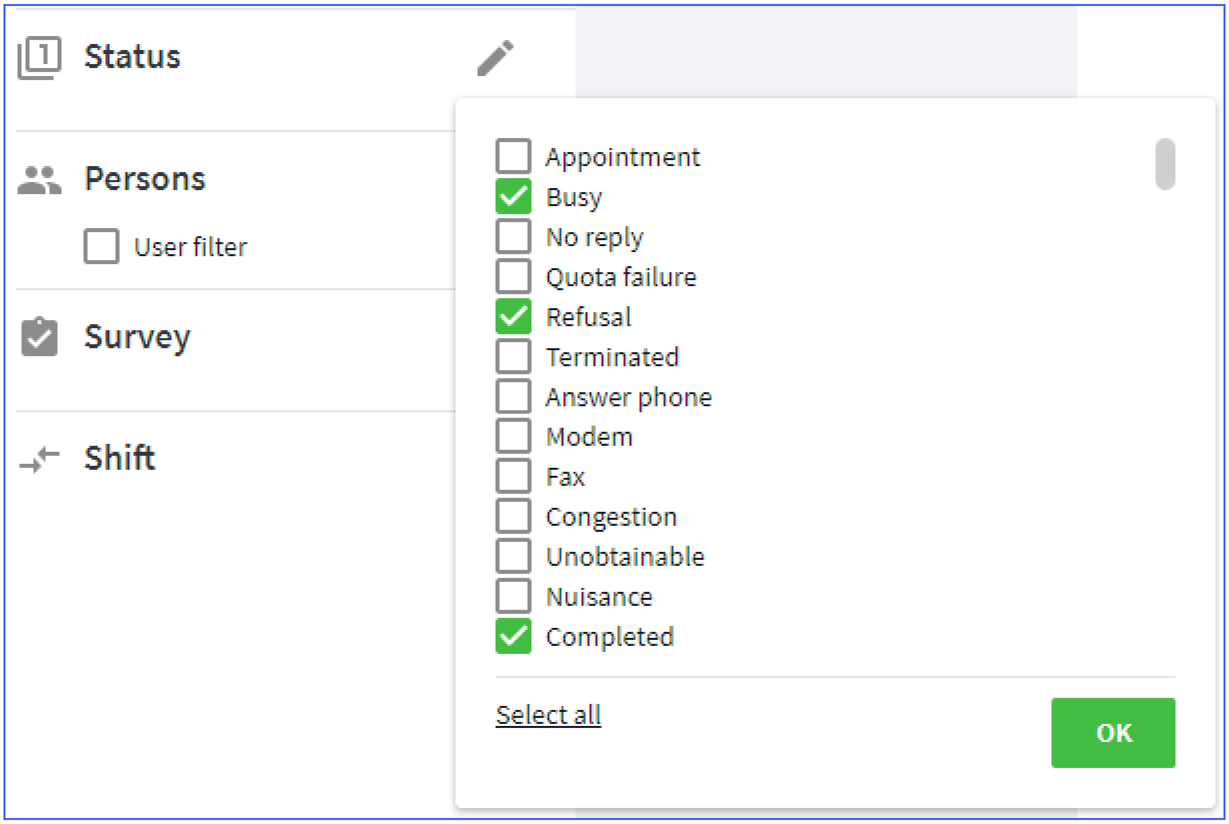


Figure 382 Selecting extended statuses to include into the Survey Productivity Report

6. 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 modal window.

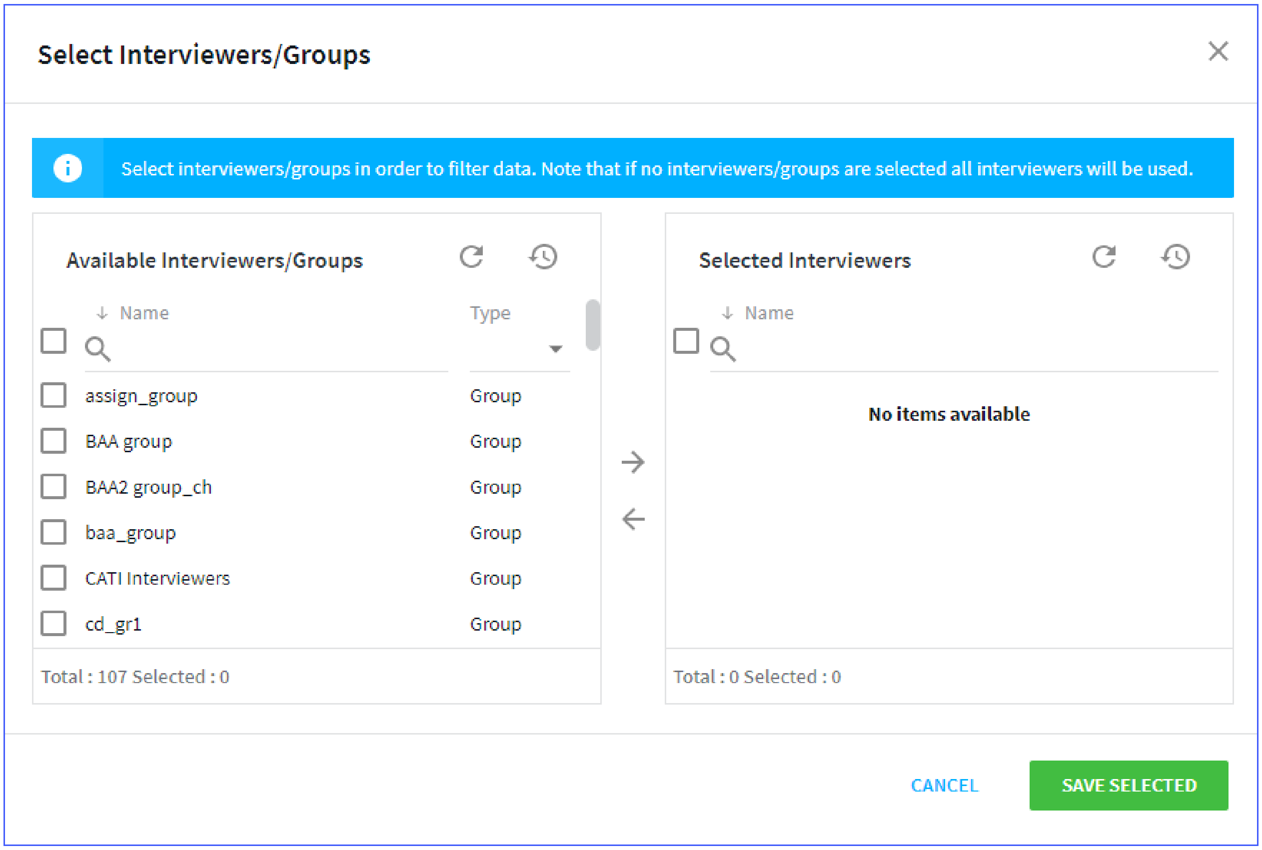


Figure 383 Selecting users to include into the Survey Productivity Report

This dialog is described in (go to Selecting interviewers or interviewer groups on page 408 for more information). Click Save selected in the dialog to save this setting.

7. 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 Confirmit Authoring module become available and can be applied using the variable filter (refer to the Confirmit 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.

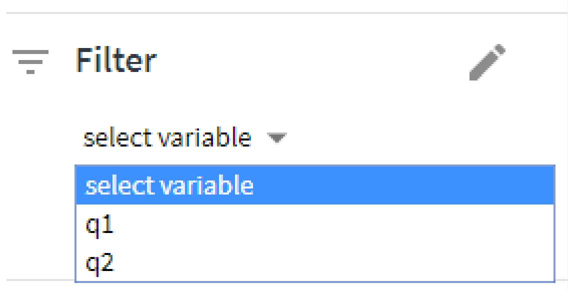
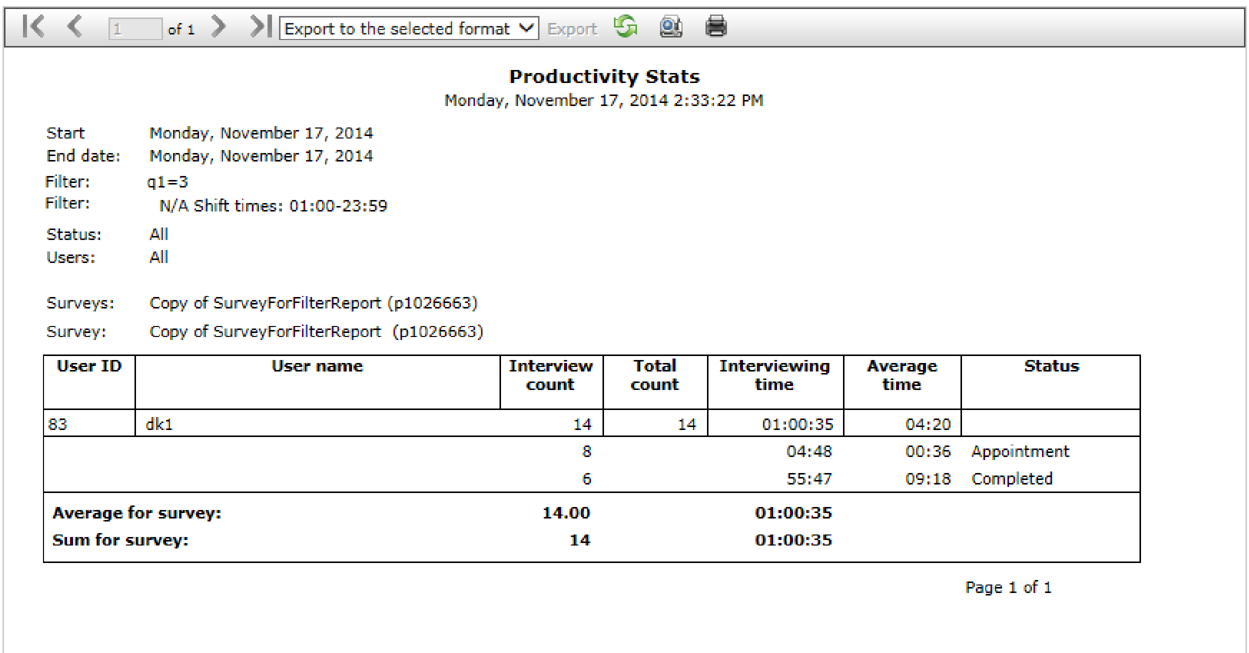


Figure 384 Choosing a variable to filter the Survey Productivity report data

8. Click the Build Report button to generate the Survey Productivity Report.



Productivity Stats
Monday, November 17, 2014 2:33:22 PM

Start Monday, November 17, 2014
End date: Monday, November 17, 2014
Filter: q1=3
Filter: N/A Shift times: 01:00-23:59
Status: All
Users: All

Surveys: Copy of SurveyForFilterReport (p1026663)
Survey: Copy of SurveyForFilterReport (p1026663)

User ID	User name	Interview count	Total count	Interviewing time	Average time	Status
83	dk1	14	14	01:00:35	04:20	
		8		04:48	00:36	Appointment
		6		55:47	09:18	Completed
Average for survey:		**14.00**		**01:00:35**		
Sum for survey:		**14**		**01:00:35**		

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Figure 385 The generated Survey Productivity Report

9. 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.

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.

9.3. 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 422 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).

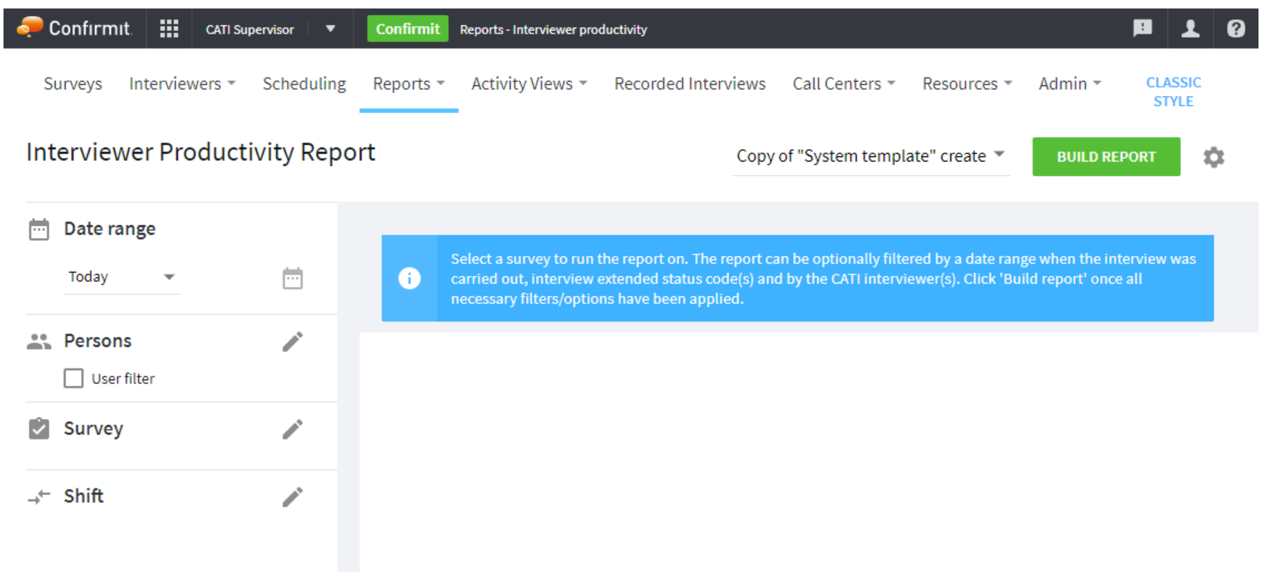


Figure 386 Configuring the Interviewer Productivity Report

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.

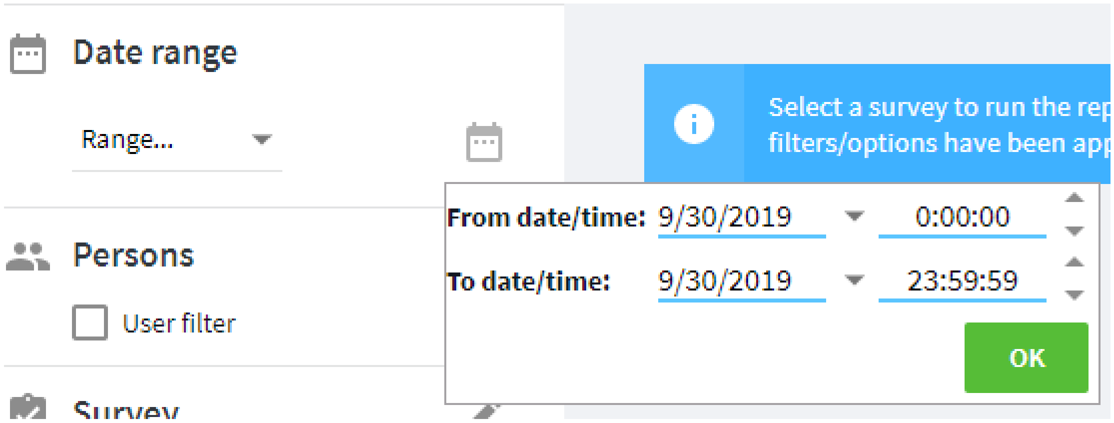


Figure 387 Choosing the date range for the Interviewer Productivity Report

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 window.

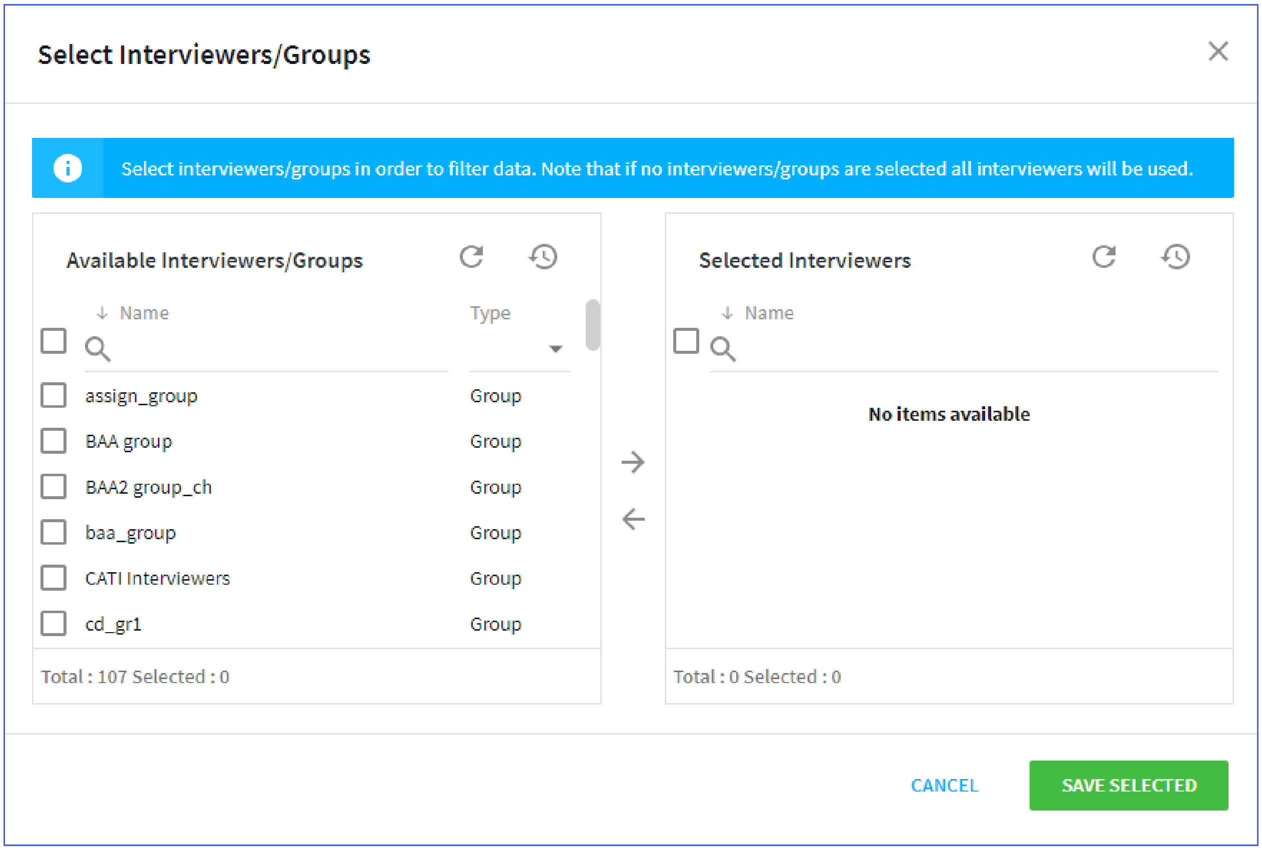


Figure 388 Selecting interviewers to include into the Interviewer Productivity Report

This dialog window is described in (go to Selecting interviewers or interviewer groups on page 408 for more information). Click Save selected in this dialog window to save this setting.

6. Then choose a survey to include in the report. Choose the Select button  to display the Select Surveys dialog window (see description of this form here - Selecting Surveys to Display in the Survey List Activity View). Click Save selected in this dialog window 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 modal window is displayed (see the picture below).

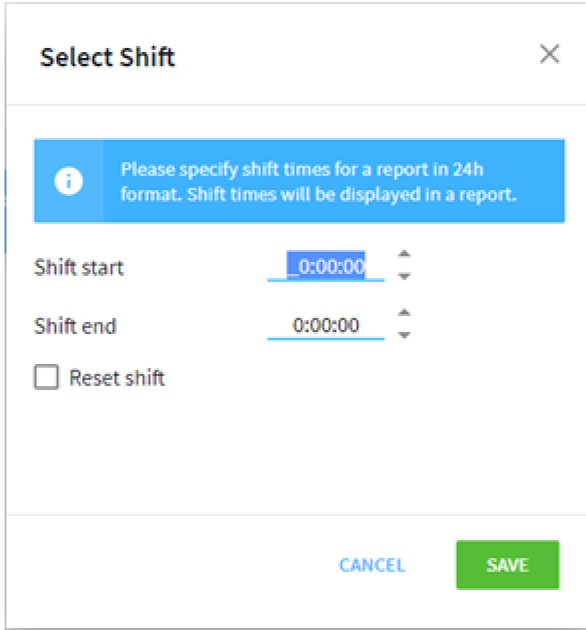


Figure 389 Choosing the Shift start and end times

Choose the desired start and end times of the shift using corresponding spin controls.

Click Save when you are done. The modal window 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 390 Checking the Shift time setting

If you need to reset shift values you have specified you should check the "Reset shift" box in the modal window. 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 Confirmit Authoring module become available and can be applied using the variable filter (refer to the Confirmit 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.

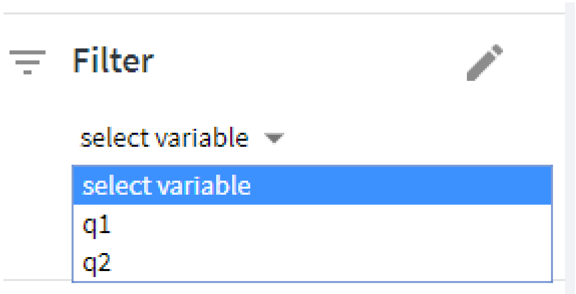
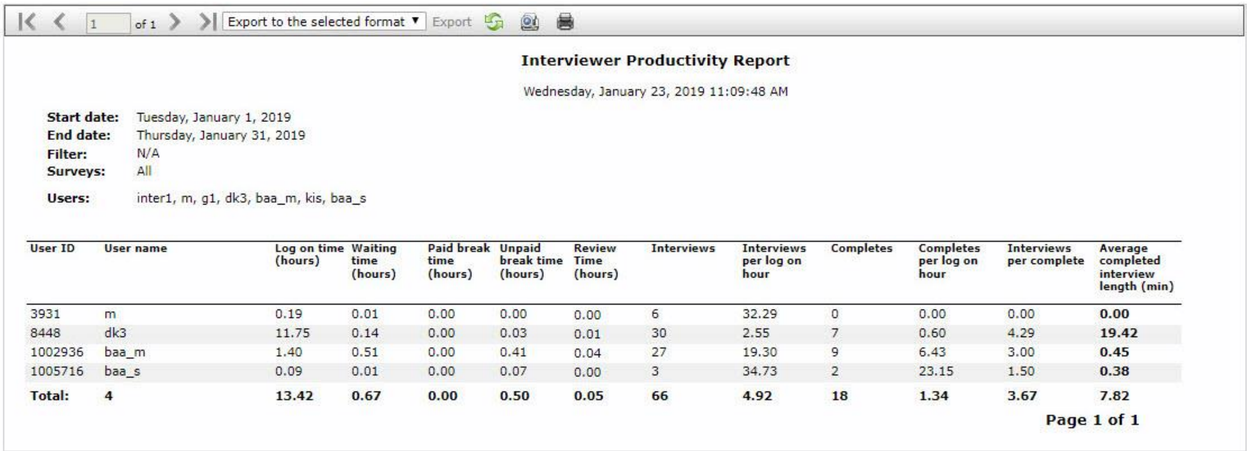


Figure 391 Choosing a variable to filter the Interviewer Productivity report data

3. 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. Refer to (go to Creating and Editing the Interviewer Productivity Report Templates on page 422 for more information) for instructions on how to configure templates.

4. 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 392 The generated Interviewer Productivity Report

5. The default Interviewer Productivity Report provides the following information:

	This is the ID of the CATI interviewer
	This is the login name for the CATI interviewer
	This is the total time (in hours) spent logged into the system during the date range selected
	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 sele
	This is the total time for which payment is provided (in hours) spent on breaks during the date range selected

s)	This is the total time for which payment is not provided (in hours) spent on breaks during the date range selected
	This is the time spent by the interviewer on reviewing open-end questions
	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 'Int many of the started interviews are likely to be terminated without going on to become 'completed' interviews). All records dialed in manual or automati 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 automatically coded outcomes like 'no reply' or 'busy'. These calls are not directly attributable to interviewers because they are dialed and coded befo 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 a column will provide the total count of numbers dialed (inclusive of non-connected outcomes like 'busy' or 'no reply').
ur	This is the number of interviews worked on for this survey per logged in hour for the date range specified
	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 variabl specified
our	This is the number of interviews with the complete status worked on for this survey per logged in hour for the date range specified
	This is the number of interviews worked on per completed interview
	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 (see (go to Taking a Break on page 281 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 374 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.

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.

9.3.1. Creating and Editing the Interviewer Productivity Report Templates

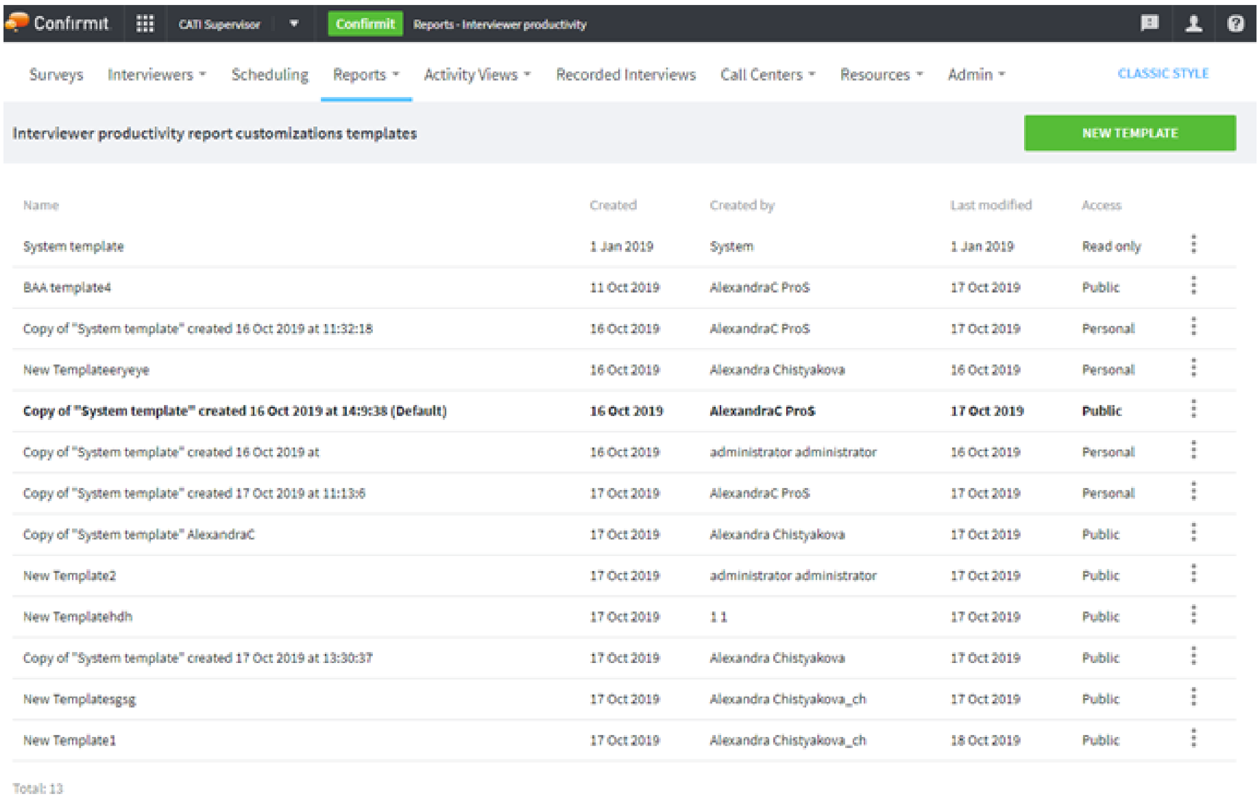
The Interviewer Productivity Report is configured using a template. Template parameters include shifts, extended statuses, dialer attempts, break-time handling, report column settings and public availability status.

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.



Name	Created	Created by	Last modified	Access
System template	1 Jan 2019	System	1 Jan 2019	Read only
BAA template4	11 Oct 2019	AlexandraC ProS	17 Oct 2019	Public
Copy of "System template" created 16 Oct 2019 at 11:32:18	16 Oct 2019	AlexandraC ProS	17 Oct 2019	Personal
New Templateeryeye	16 Oct 2019	Alexandra Chistyakova	16 Oct 2019	Personal
Copy of "System template" created 16 Oct 2019 at 14:9:38 (Default)	**16 Oct 2019**	**AlexandraC ProS**	**17 Oct 2019**	**Public**
Copy of "System template" created 16 Oct 2019 at	16 Oct 2019	administrator administrator	16 Oct 2019	Personal
Copy of "System template" created 17 Oct 2019 at 11:13:6	17 Oct 2019	AlexandraC ProS	17 Oct 2019	Personal
Copy of "System template" AlexandraC	17 Oct 2019	Alexandra Chistyakova	17 Oct 2019	Public
New Template2	17 Oct 2019	administrator administrator	17 Oct 2019	Public
New Templatehdh	17 Oct 2019	1 1	17 Oct 2019	Public
Copy of "System template" created 17 Oct 2019 at 13:30:37	17 Oct 2019	Alexandra Chistyakova	17 Oct 2019	Public
New Templatesgsg	17 Oct 2019	Alexandra Chistyakova_ch	17 Oct 2019	Public
New Template1	17 Oct 2019	Alexandra Chistyakova_ch	18 Oct 2019	Public

Figure 393 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 425 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.

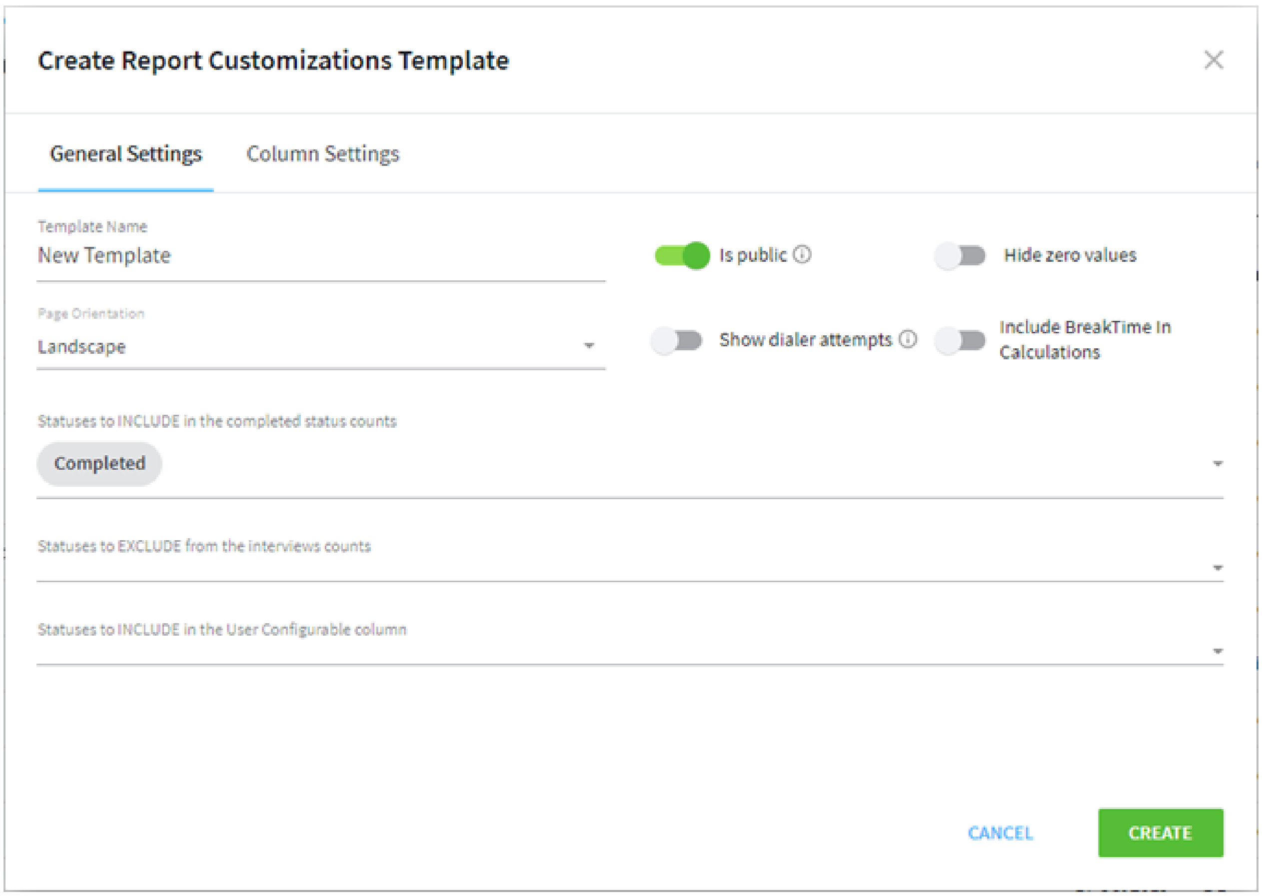


Figure 394 The Create Report Customizations Template dialog

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.

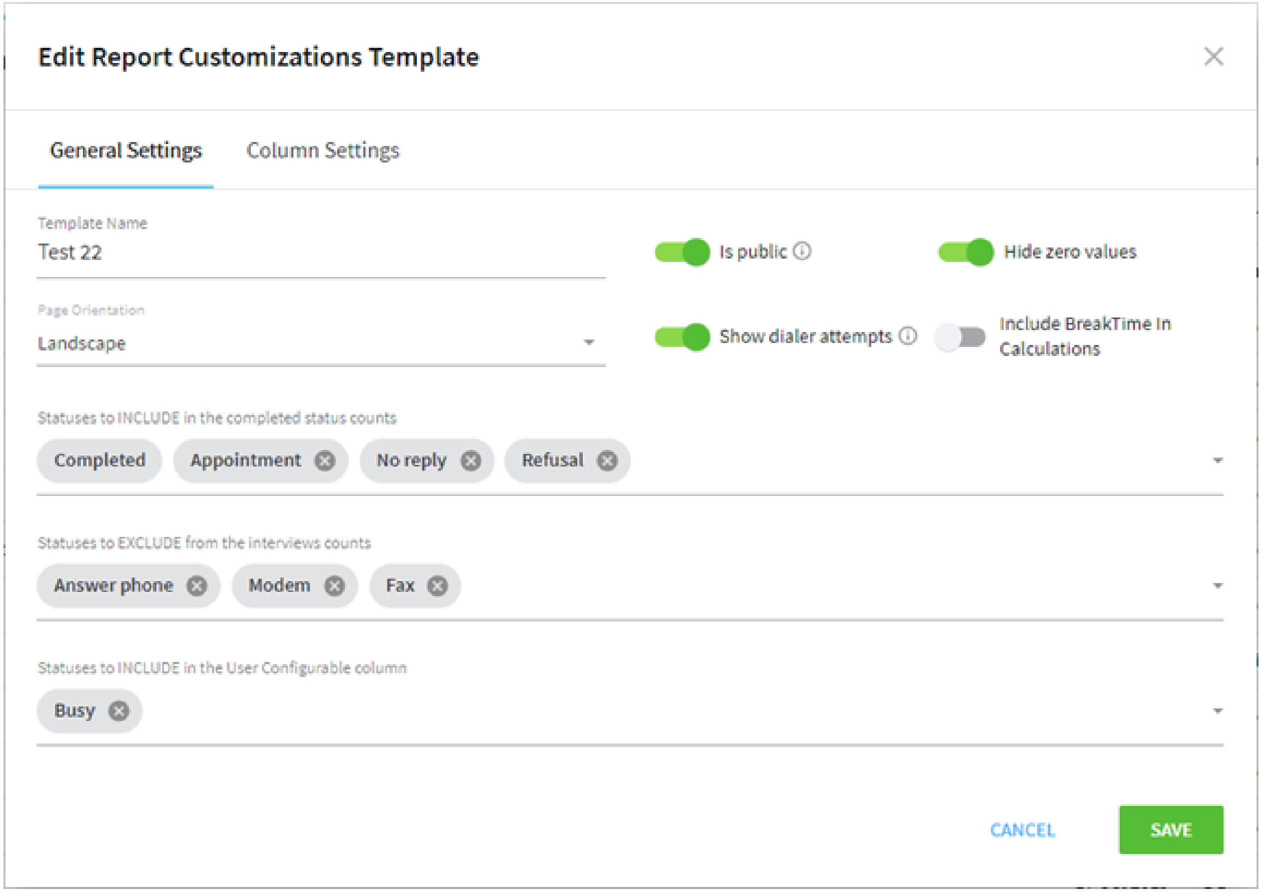


Figure 395   The Edit Report Customizations Template dialog

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 amount 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.

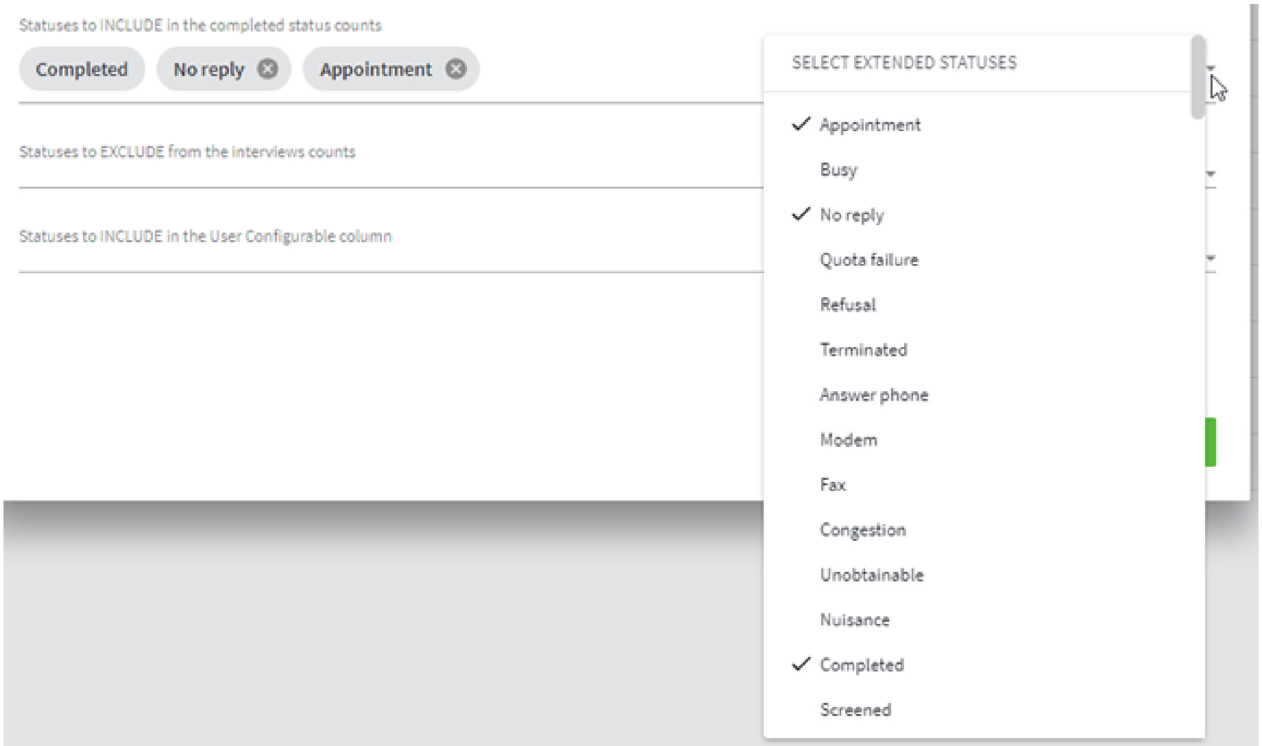


Figure 396 Selecting extended statuses to be used "completes" in the report

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.

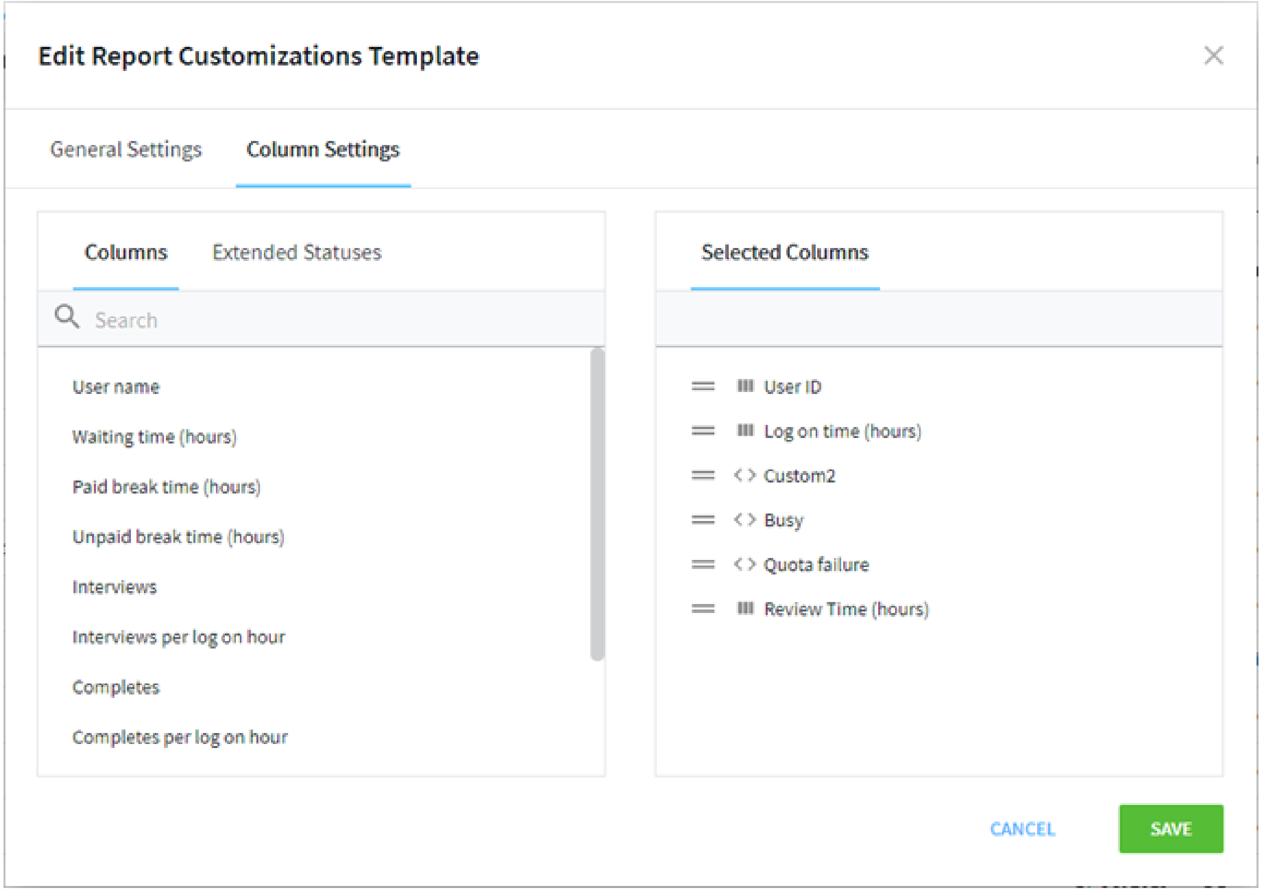


Figure 397

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 284 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.

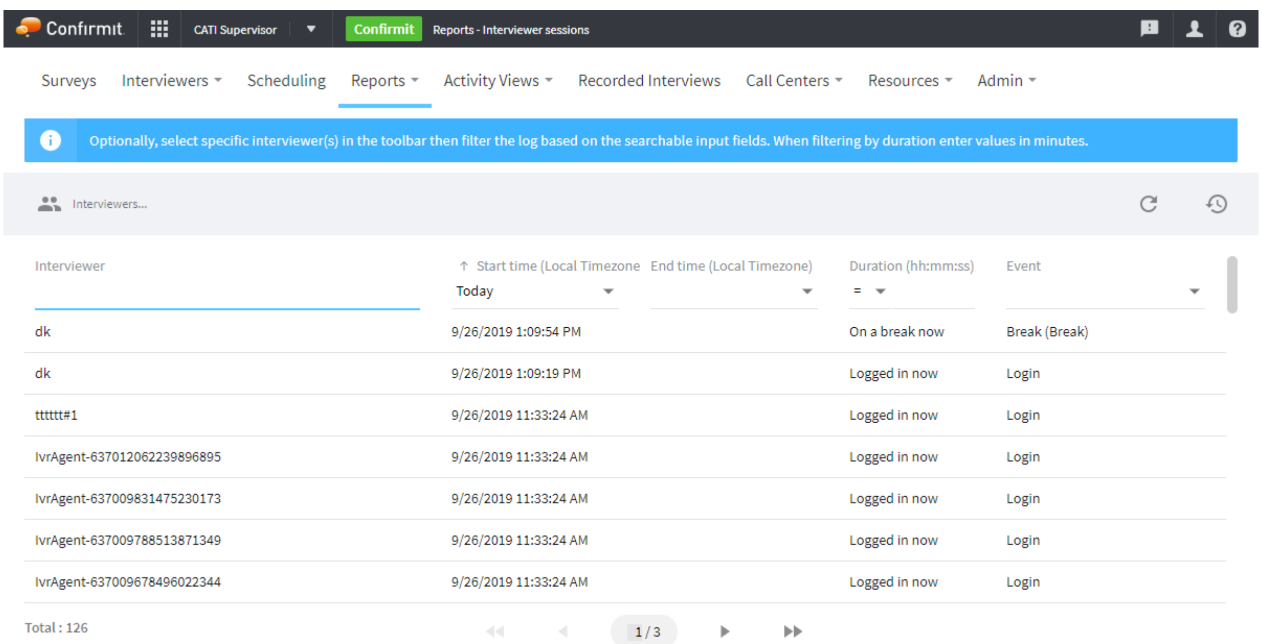


Figure 398 Interviewer Sessions report generated for the current day

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 Interviewers... on the toolbar. This will display the Select Interviewers/Groups modal window.

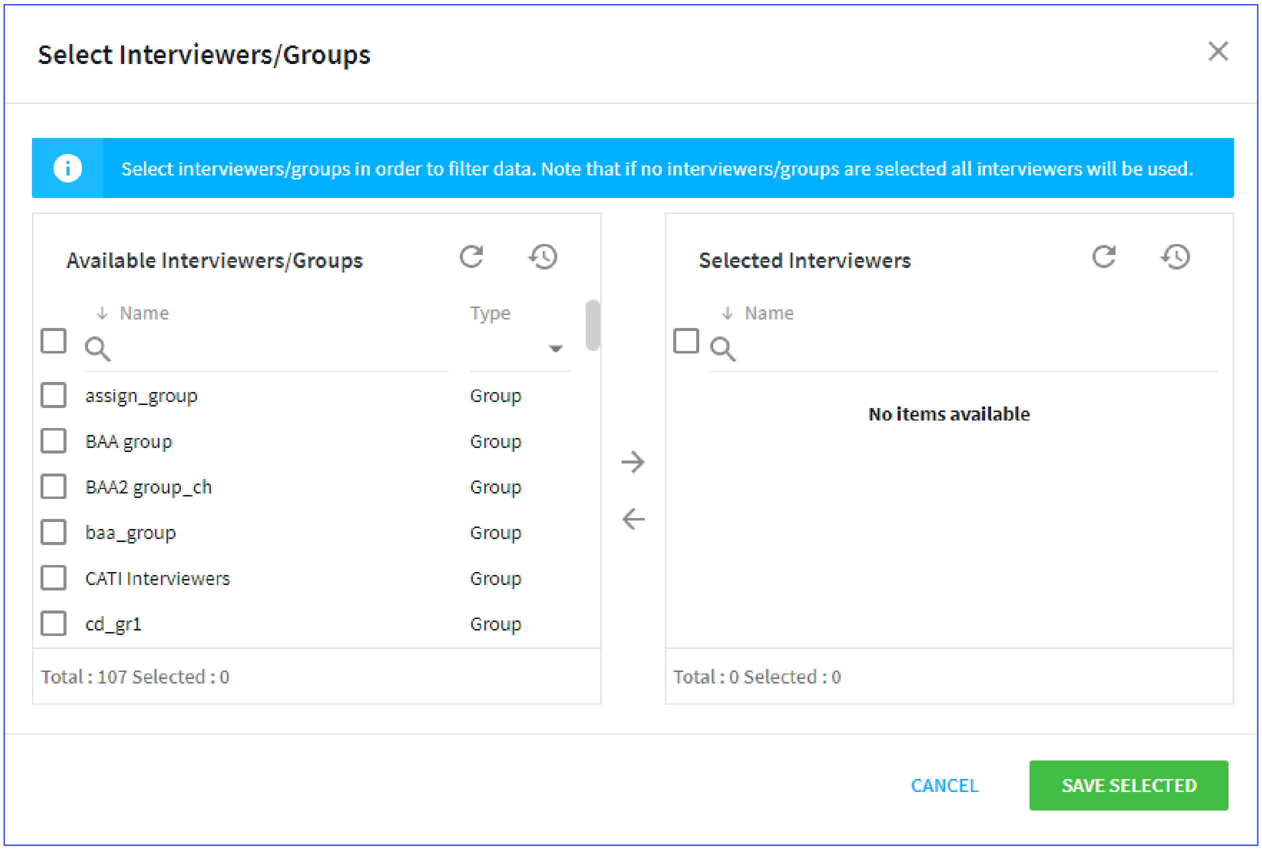


Figure 399 Selecting interviewers to include in the Interviewer Sessions report

This dialog is described in (go to Selecting interviewers or interviewer groups on page 408 for more information). Click Save selected in this dialog window 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).

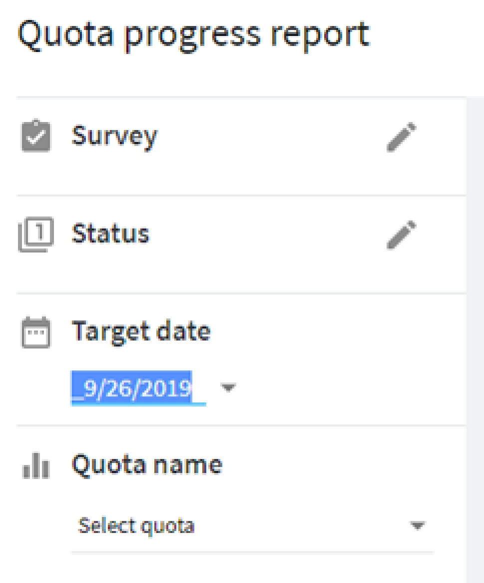


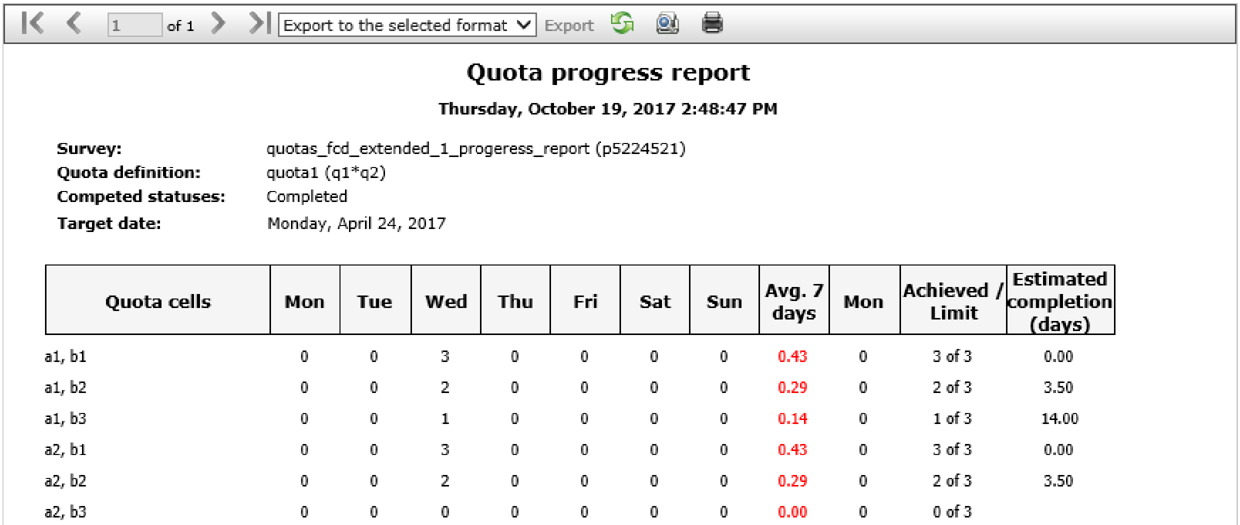
Figure 400 The Quota Progress report settings

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 window (see description of this form here - (go to Click the Surveys button on the toolbar. This will display the Select Surveys dialog window. on page 309 for more information)). Click Save selected in this dialog window 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 401 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 81 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).

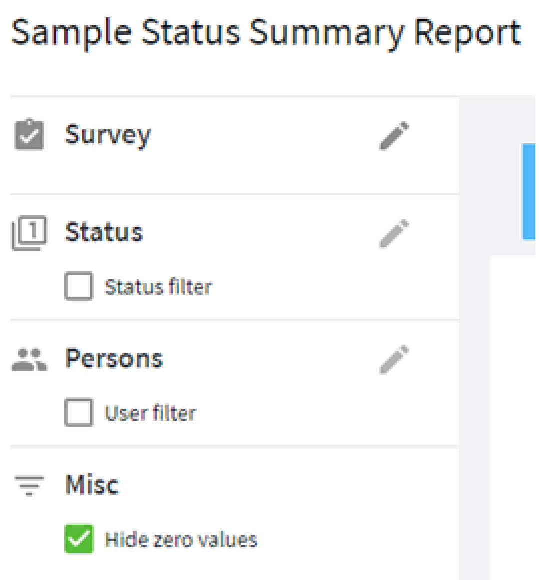


Figure 402 Configuring the Sample Status Summary Report

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 window (see description of this dialog here - Selecting Surveys to Display in 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.

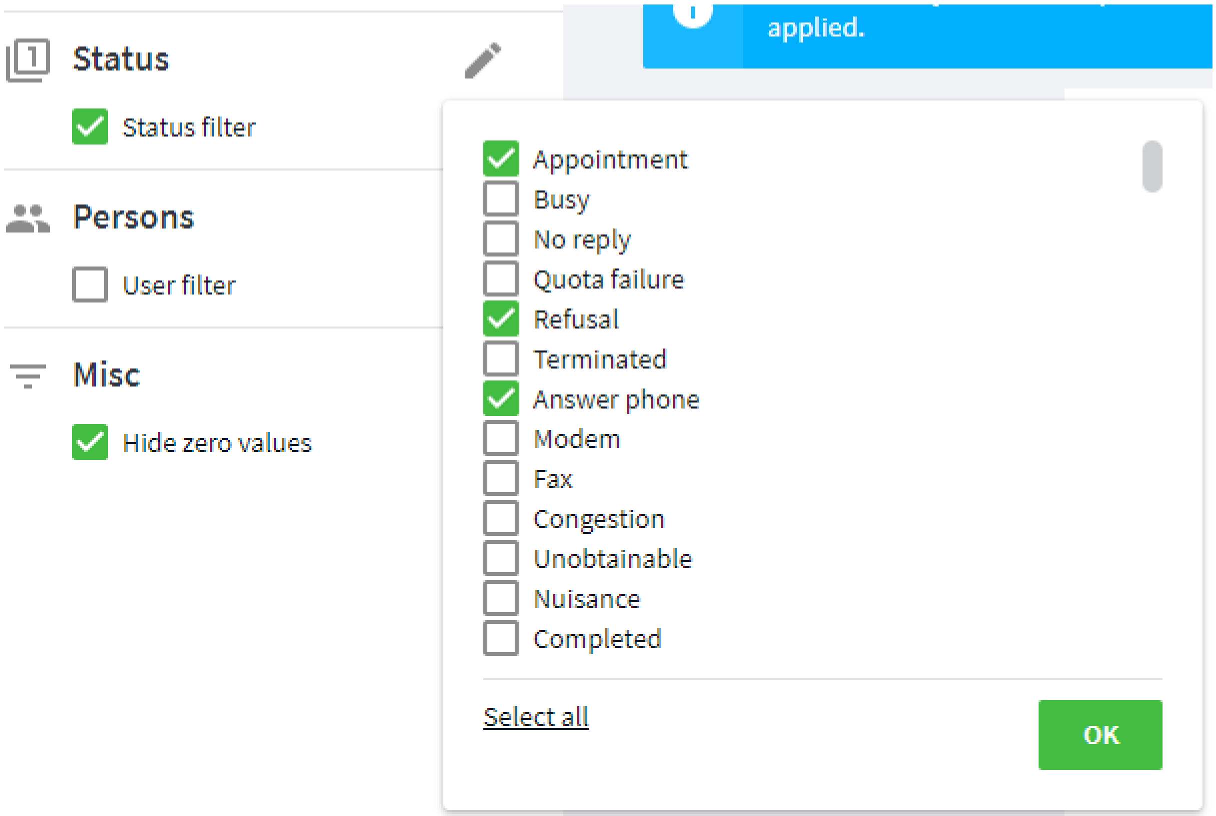


Figure 403 Applying extended status filter to the Sample Status Summary Report

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.

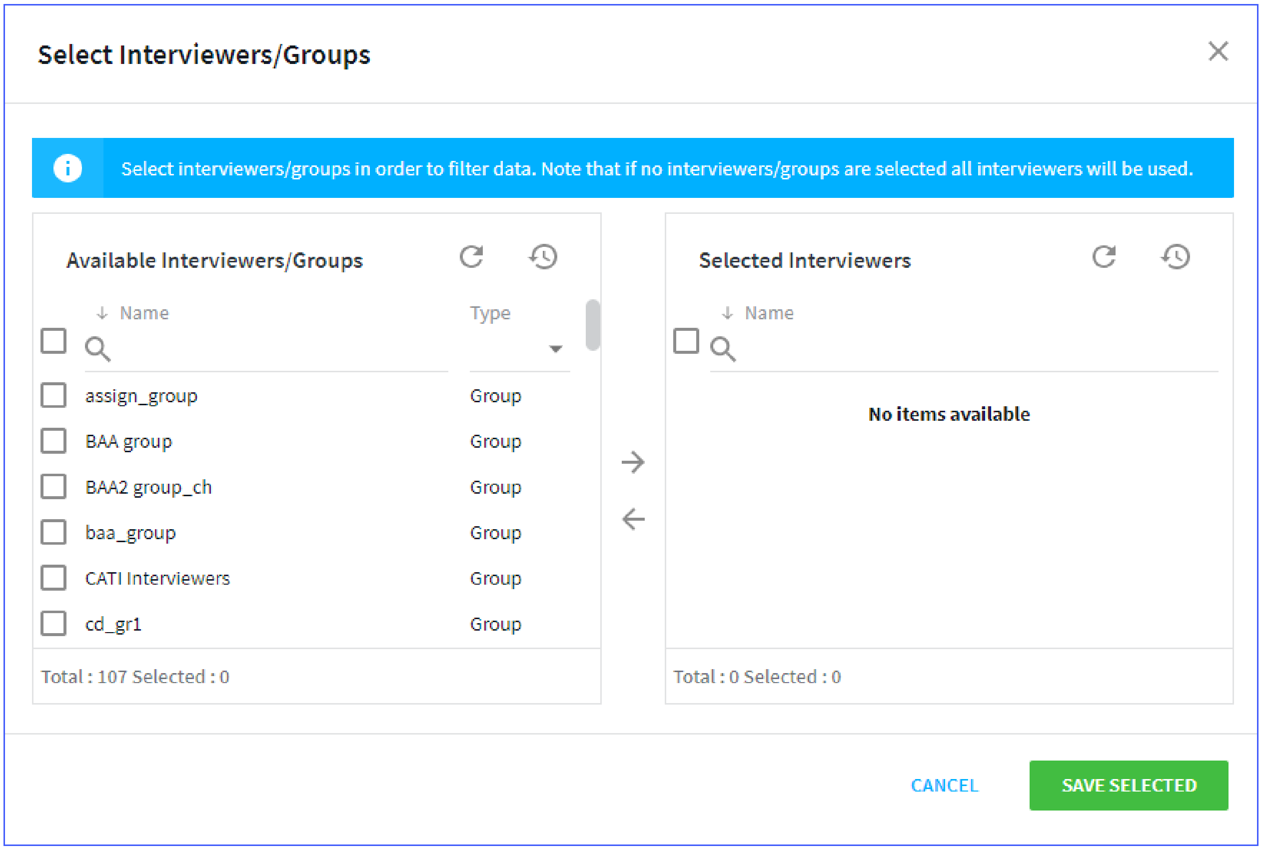


Figure 404 Applying the user filter to the Sample Status Summary Report

This dialog window assumes using the same technique as it is used to make a choice in the Select Surveys dialog window described in Selecting Surveys to Display in the Survey List Activity View (also see step 3 above). Click Save selected in this dialog window to save this setting.

6. Click the Build Report button to generate the Sample Status Summary Report.

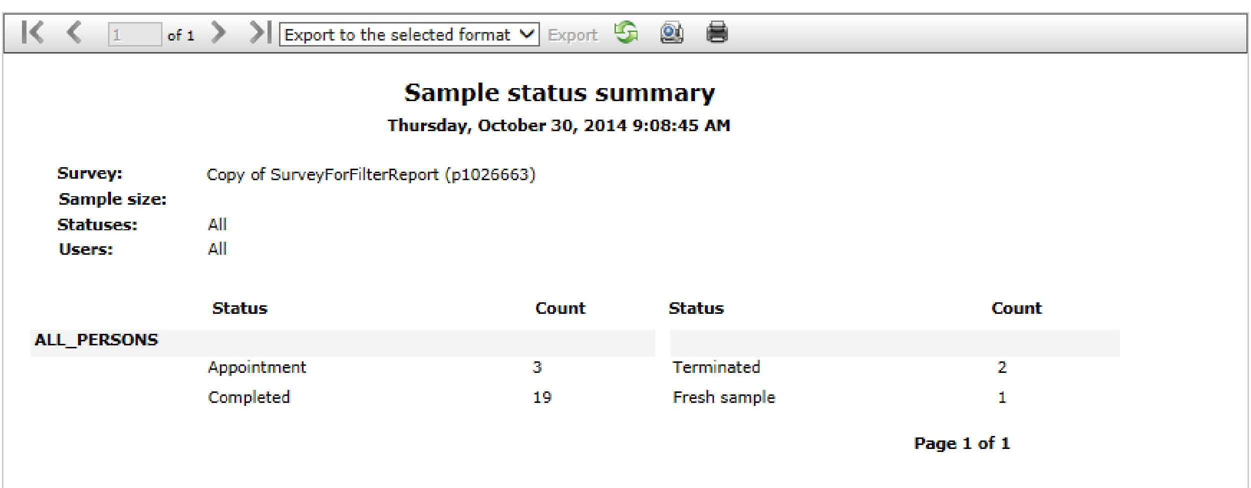


Figure 405 The generated Sample Status Summary Report

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).

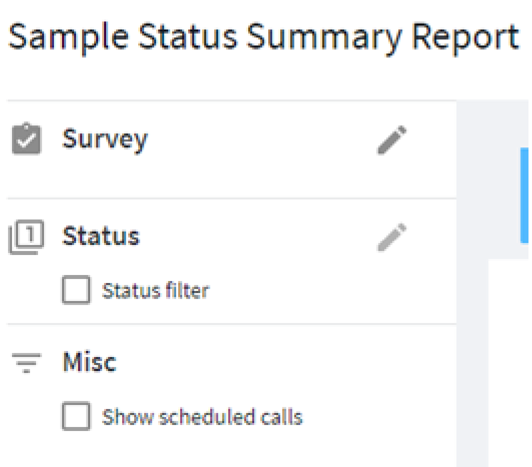


Figure 406 Selecting a survey to build a Sample Status Summary by Question Report

2. Click the Select button to display the Select Surveys dialog window (see description of this form here - Selecting Surveys to Display in the Survey List Activity View). Click OK in this dialog window 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).

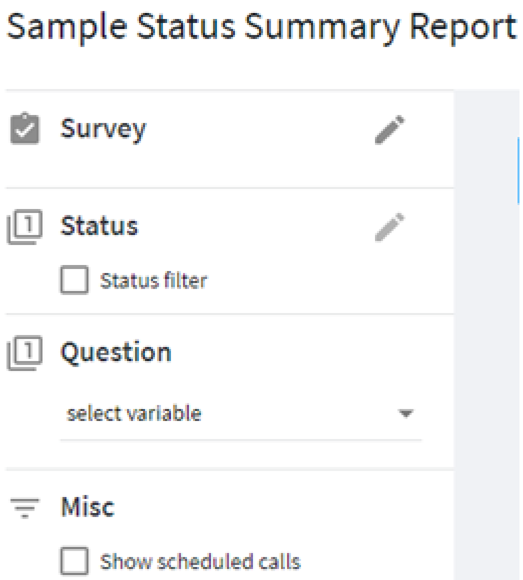


Figure 407 The complete Sample Status Summary by Question Report configuration set

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.

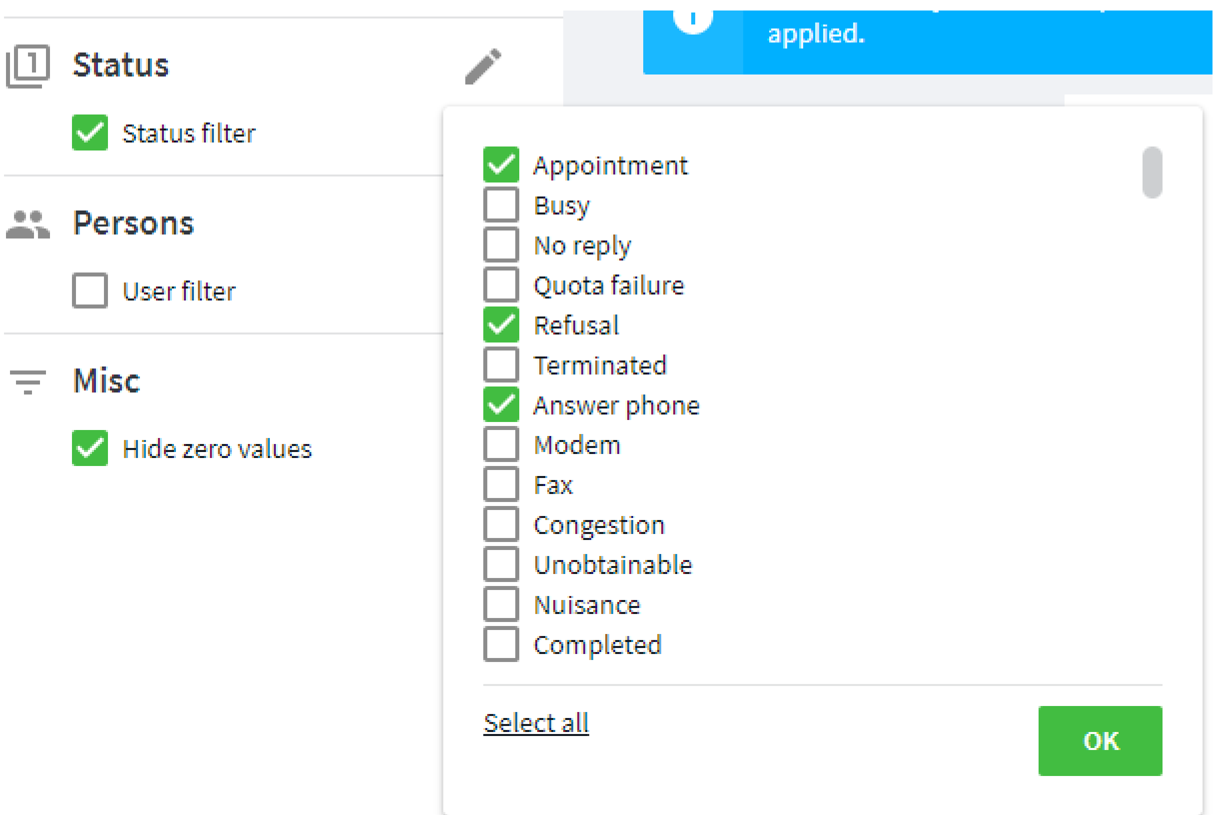
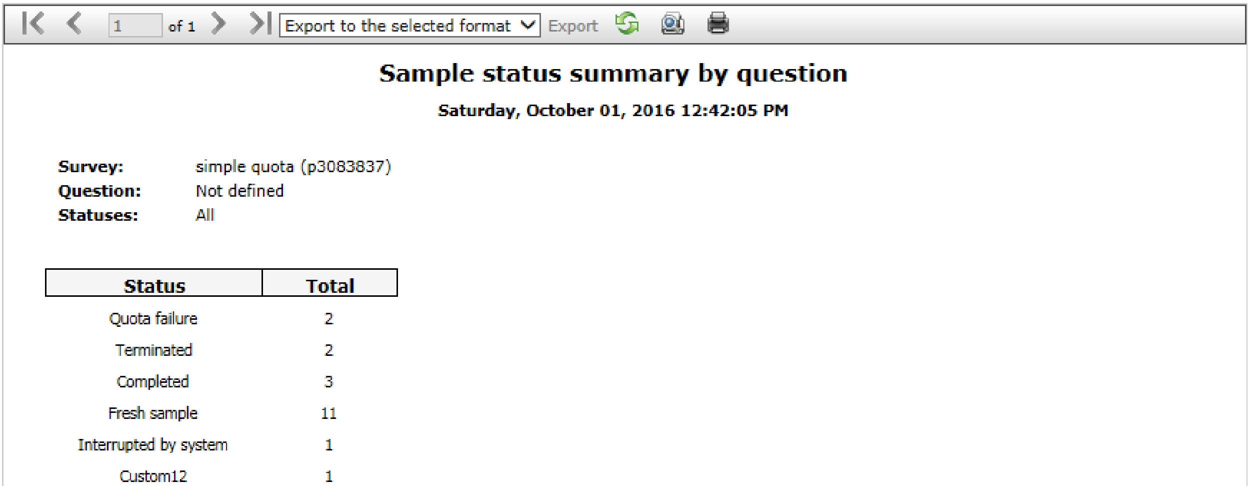


Figure 408 Applying extended status filter to the Sample Status Summary by Question Report

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.



Sample status summary by question

Saturday, October 01, 2016 12:42:05 PM

Survey: simple quota (p3083837)
Question: Not defined
Statuses: All

Status	Total
Quota failure	2
Terminated	2
Completed	3
Fresh sample	11
Interrupted by system	1
Custom12	1

Figure 409 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.

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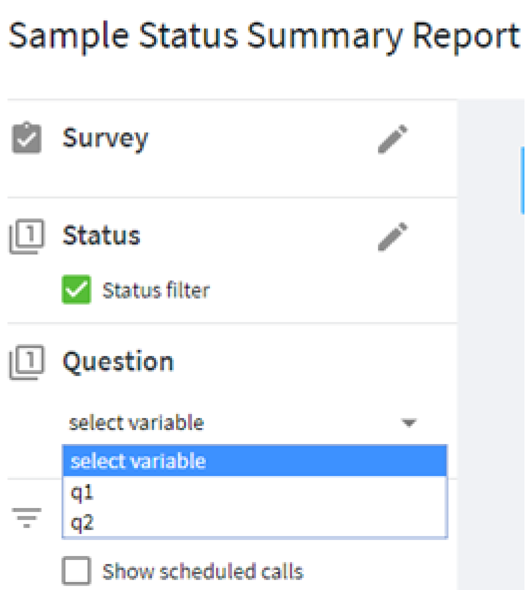
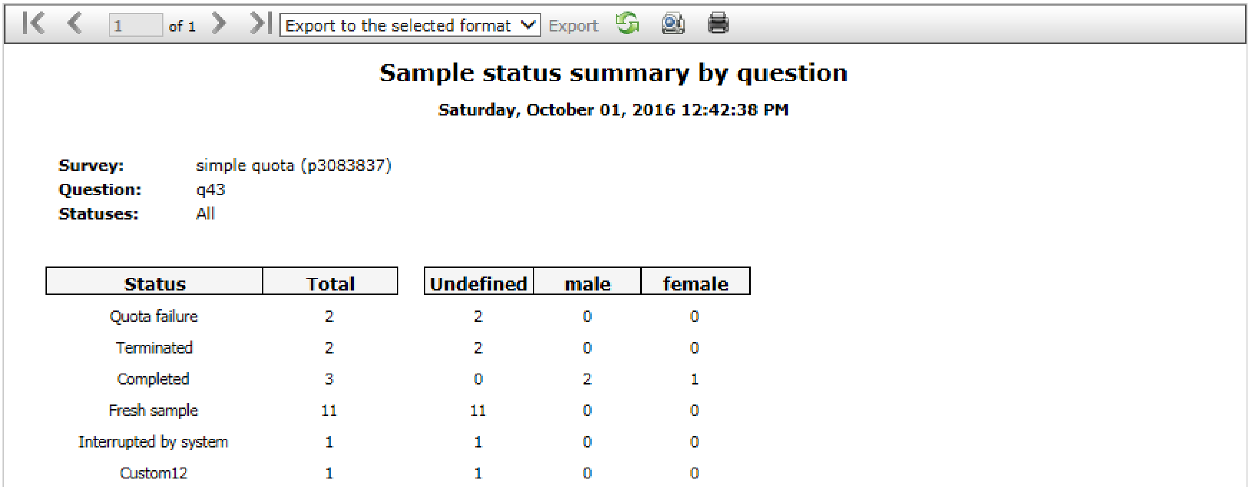


Figure 410 Selecting a variable to include into the Sample Status Summary by Question report

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

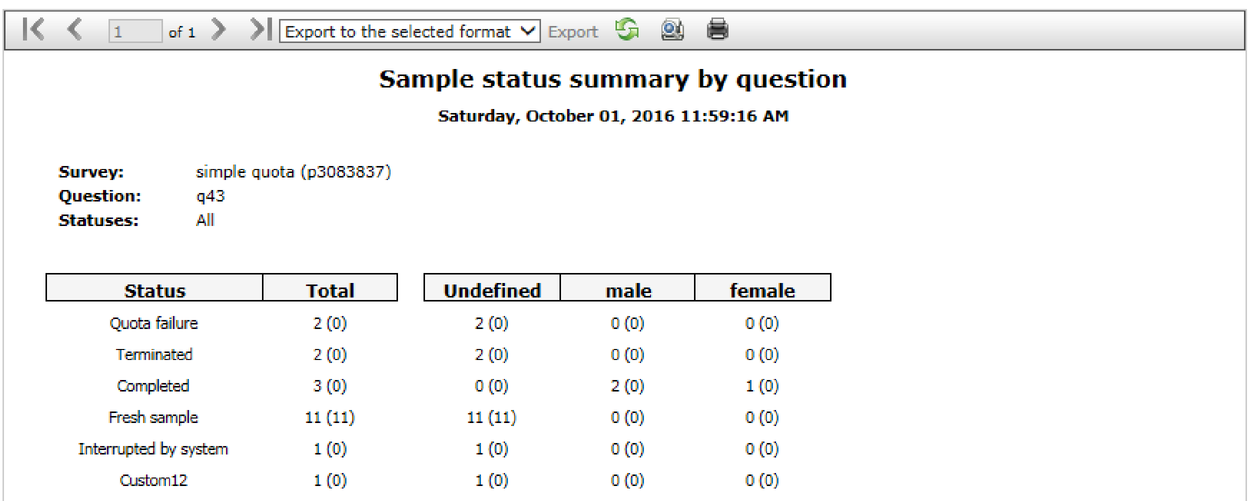
Survey: simple quota (p3083837)
Question: q43
Statuses: All

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 411 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 412 The Sample Status Summary by Question Report showing the amount 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 amount of uploaded, deleted, attempted and currently available records, and also the amount of attempted interview sample records;
- to monitor the exact amount of the uploaded sample records that were blocked due to the exceeded cell quotas, and also the amount of sample records that were attempted repeatedly after such blocking;
- to see how many of the attempted interviews were completed and also the average amount 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 amount of interviews that were blocked by FCD after they were attempted;
- Blocked by FCD not attempted - shows the amount 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 amount of interviews from this batch that were completed;
- Attempted per complete - the amount 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 amount 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).

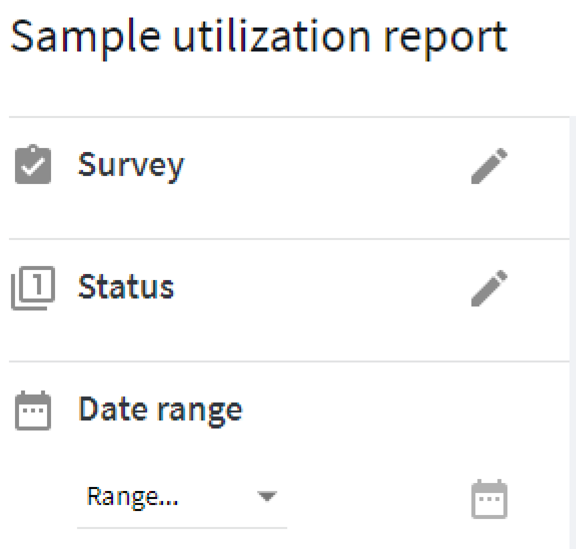


Figure 413 Configuring the Sample Utilization Report

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 window (see description of this form here - Selecting Surveys to Display in the Survey List Activity View). Click OK in this dialog window 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.

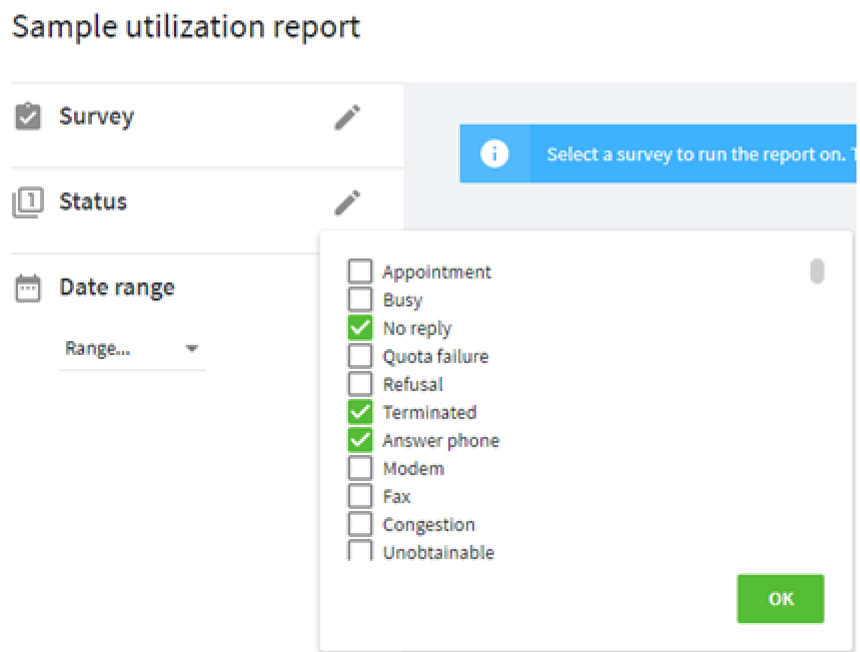


Figure 414 Applying extended status filter to the Sample Utilization Report

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.

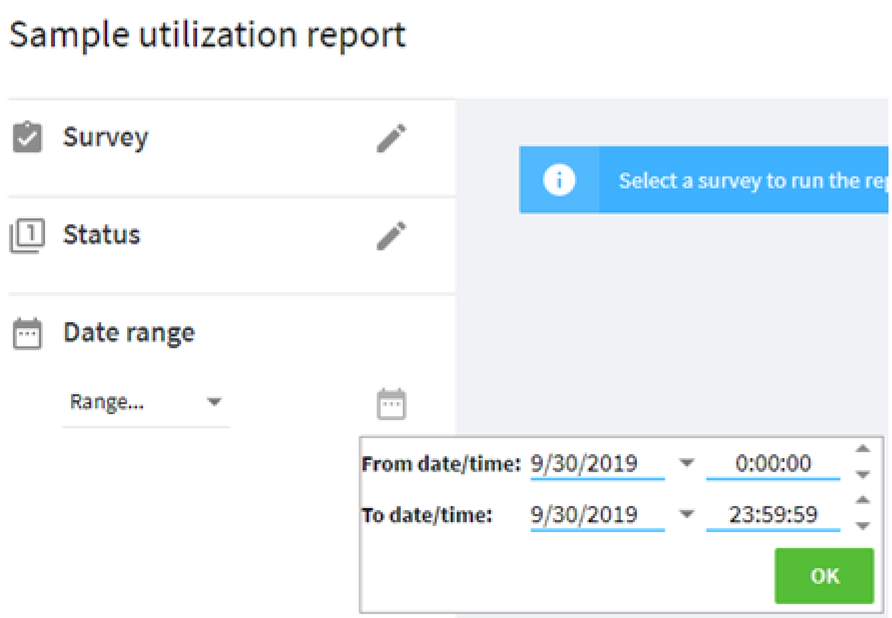
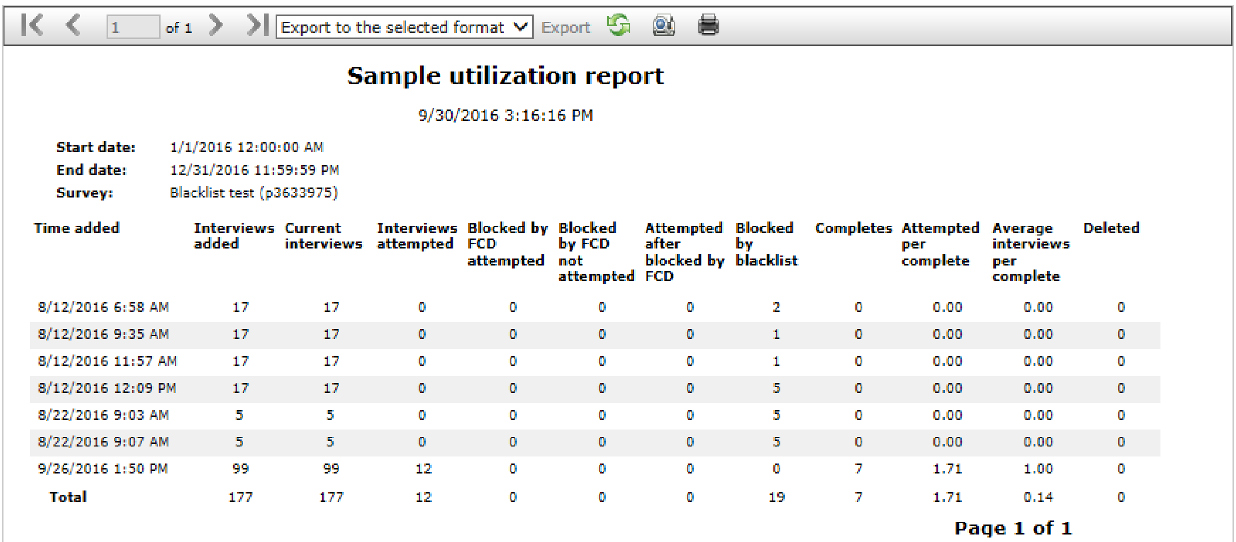


Figure 415 Adjusting the date range for the Sample Utilization Report

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

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Figure 416 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 Call Attempts report contains the following data displayed in columns:

- Date - the date and time the 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;
- Interviewer - the login name of the interviewer who has made the call;
- Interviewer ID - the ID of the interviewer who has made the call;
- Phone - 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);
- Duration - duration of the interview/call.

After the Call Attempts report is generated and displayed the supervisor can filter the report contents by any column shown in this report (except for the Duration, which 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. Choose Reports in the Navigation menu, then choose the Call Attempts from the drop-down list that unfolds.

   This will display the Call Attempts report in the CATI Supervisor window.

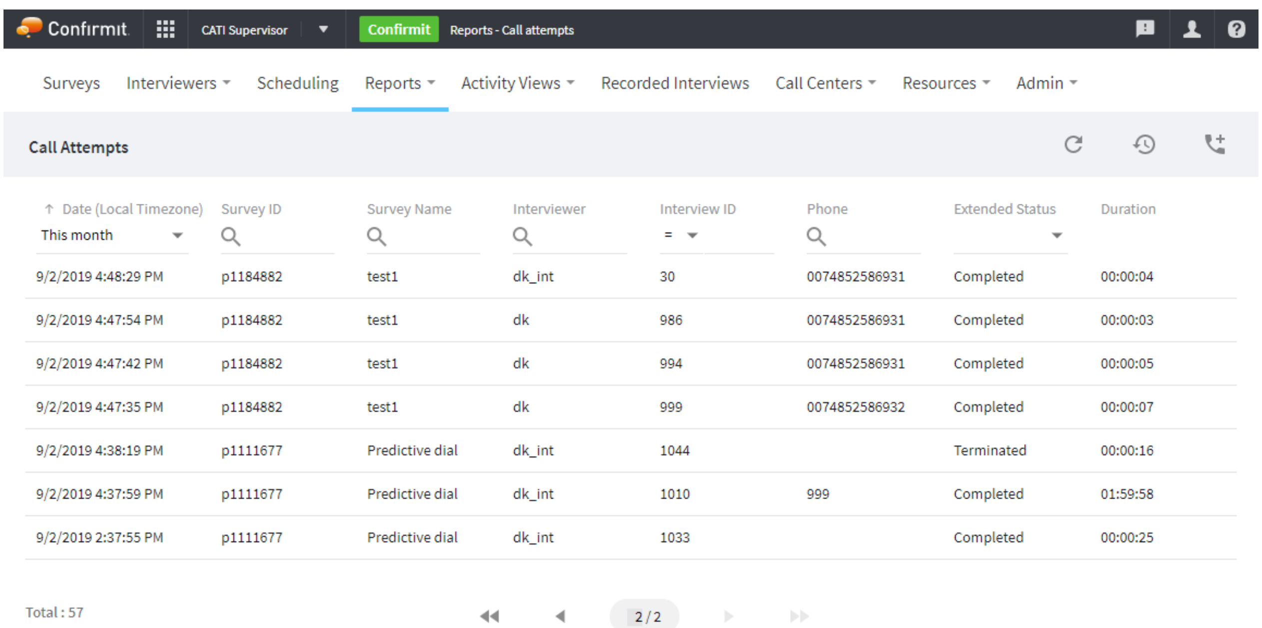


Figure 417 The Call Attempts report

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. You can also sort the displayed events by their duration - click the Duration column header to change the sorting order. The triangle icon in the header cell will show the sorting direction - either ascending or descending.
5. In case 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 on the frame toolbar.

To generate the Call Attempts report for a certain survey:

1. Choose the Surveys object tab 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 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.
3. You can update and filter the generated report - refer to steps 2 to 5 of the previous instruction.

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).

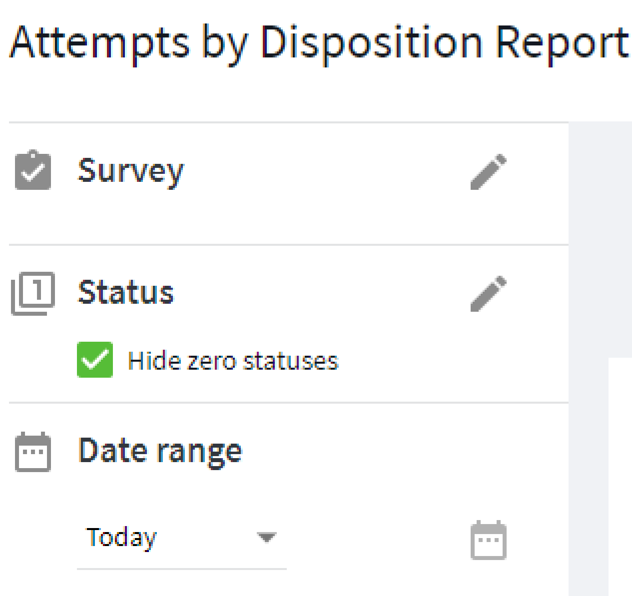


Figure 418 Configuring the Attempts by disposition Report

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 to Display in 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.

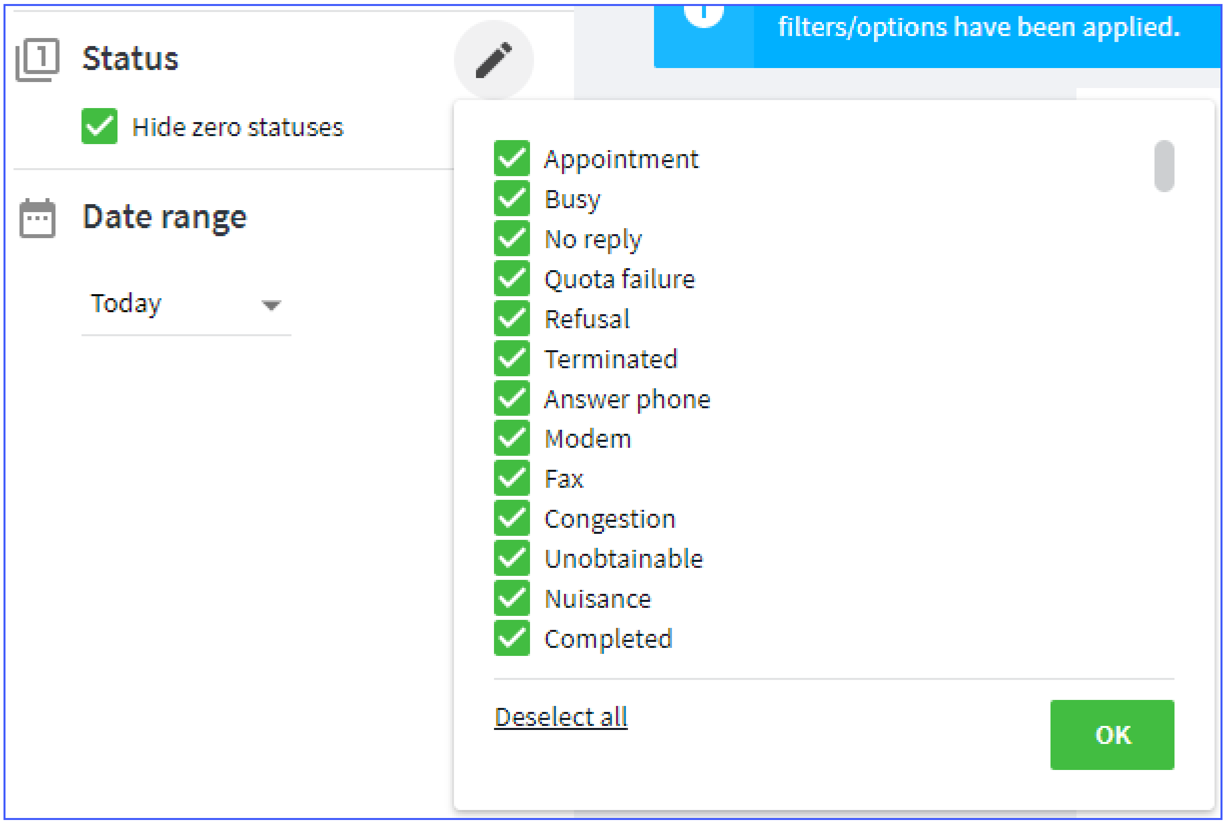


Figure 419 Selecting extended statuses to include into the Attempts by disposition Report

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.

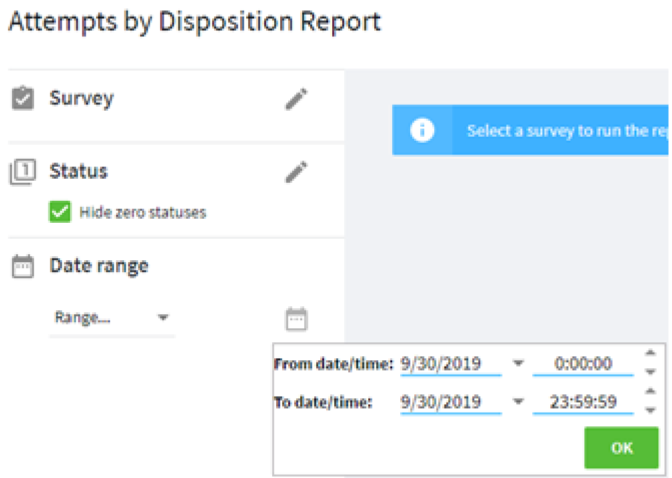


Figure 420 Choosing the date range for the Attempts by disposition Report

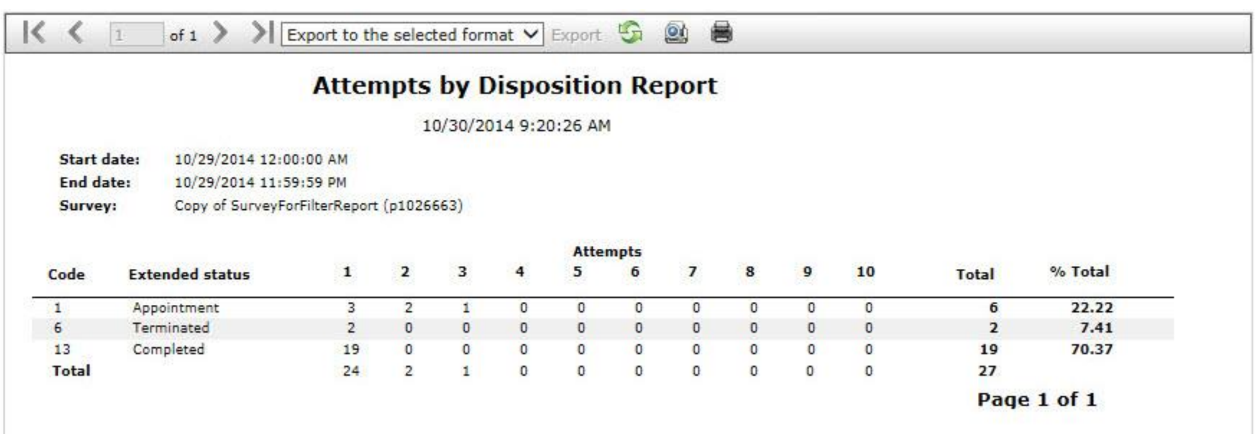
5. Specify the start and finish time for the desired period using the From and To fields. Choosing these fields invokes a calendar form (click the arrow button in the date field). The time spinbox allows increasing and decreasing value with the help of the buttons, or entering the value manually. Click **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)

Code	Extended status	Attempts 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 421 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).

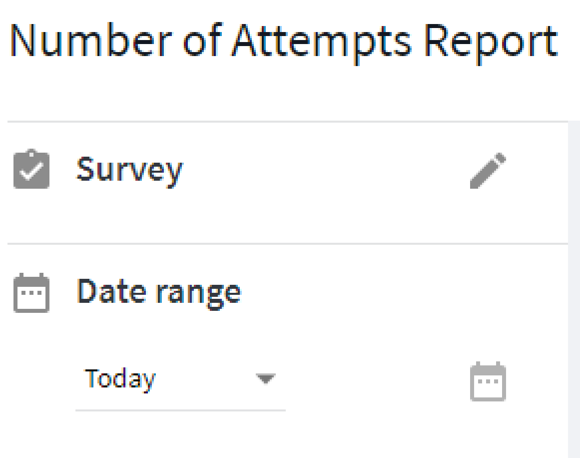


Figure 422 Configuring the Number of attempts Report

2. Select a single survey for which the report will be generated. Click the Select button (Survey) to display the Select Surveys dialog window (see description of this form here - Selecting Surveys to Display in the Survey List Activity View). Click Save selected in this dialog window 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 window 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.

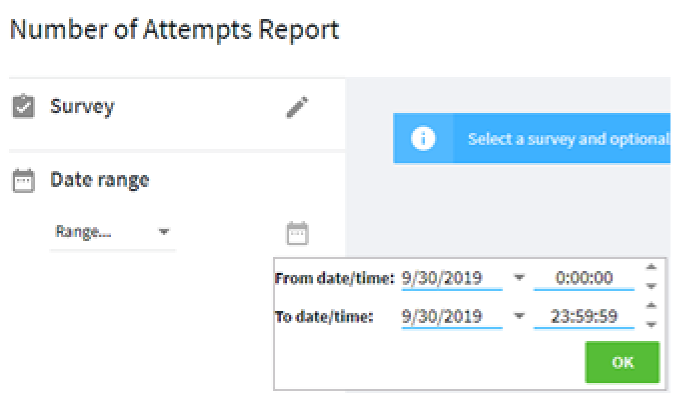
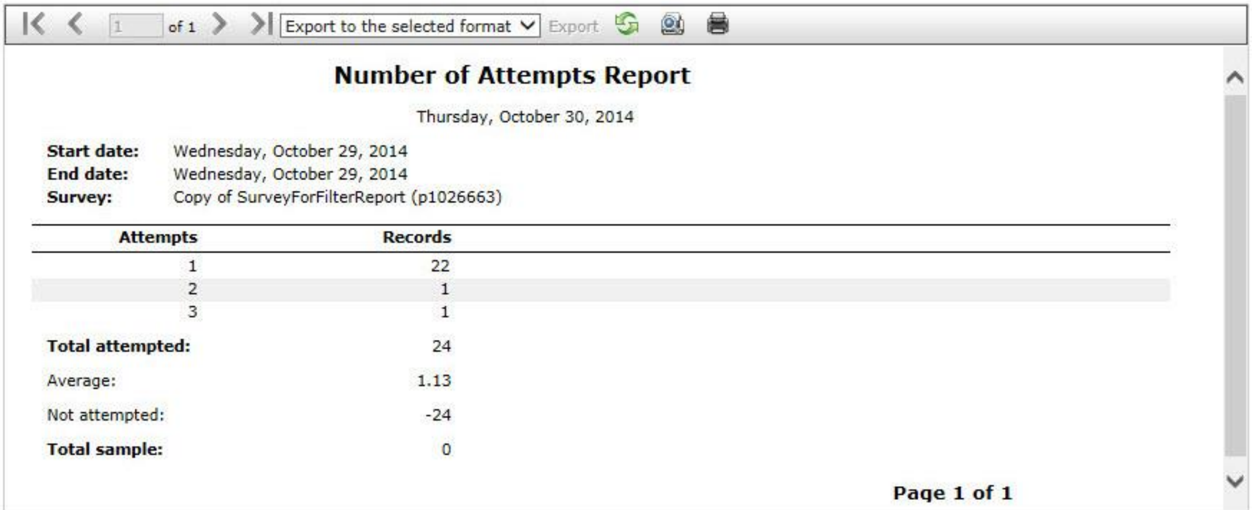


Figure 423 Choosing the date range for the Number of Attempts Report

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.


1 of 1 Export to the selected format Export

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 424 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 amount of inbound calls registered by the system during this one hour interval (other statistics are also calculated for certain one-hour intervals);
- Handled - the amount of inbound calls answered by an interviewer;
- Abandoned by system - the amount 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 amount 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 amount of inbound calls;
- Avg call duration for connected calls - average duration of a handled inbound call;
- Completes count - the amount 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).

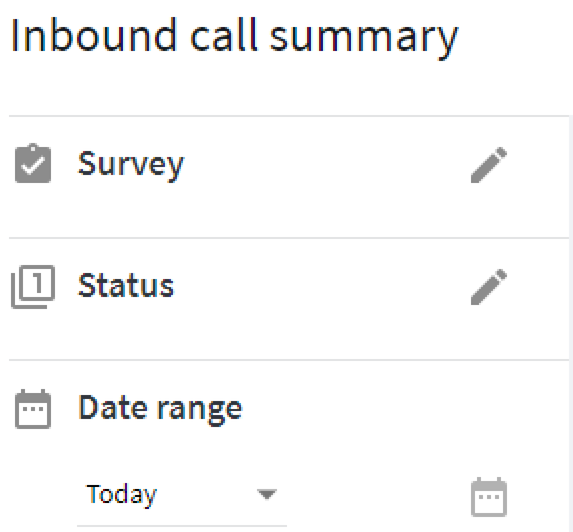


Figure 425 Inbound Call Summary report settings

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 window (see description of this form here - Selecting Surveys to Display in the Survey List Activity View). Click OK in this dialog window 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.

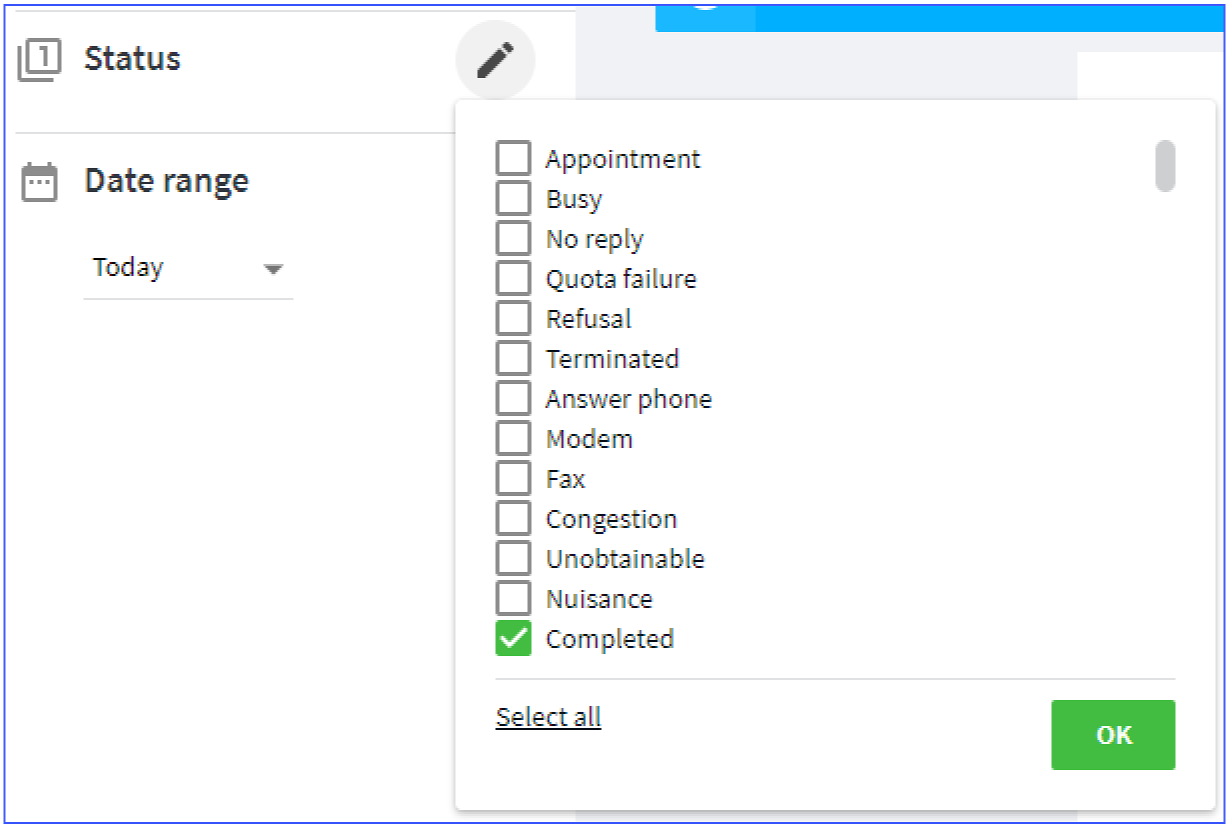


Figure 426 Selecting extended statuses to include into the Inbound Call Summary report

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.

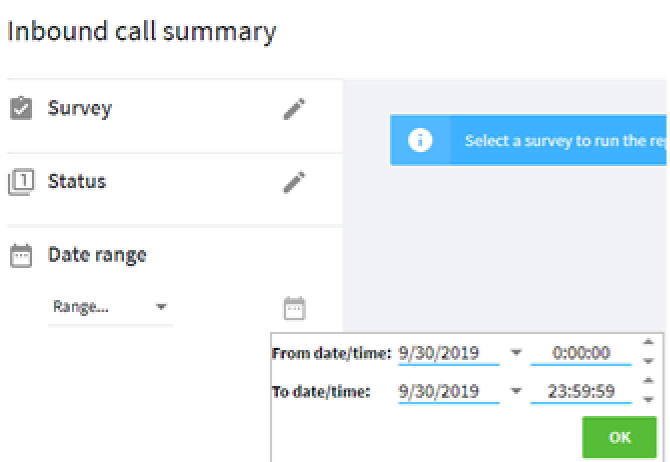
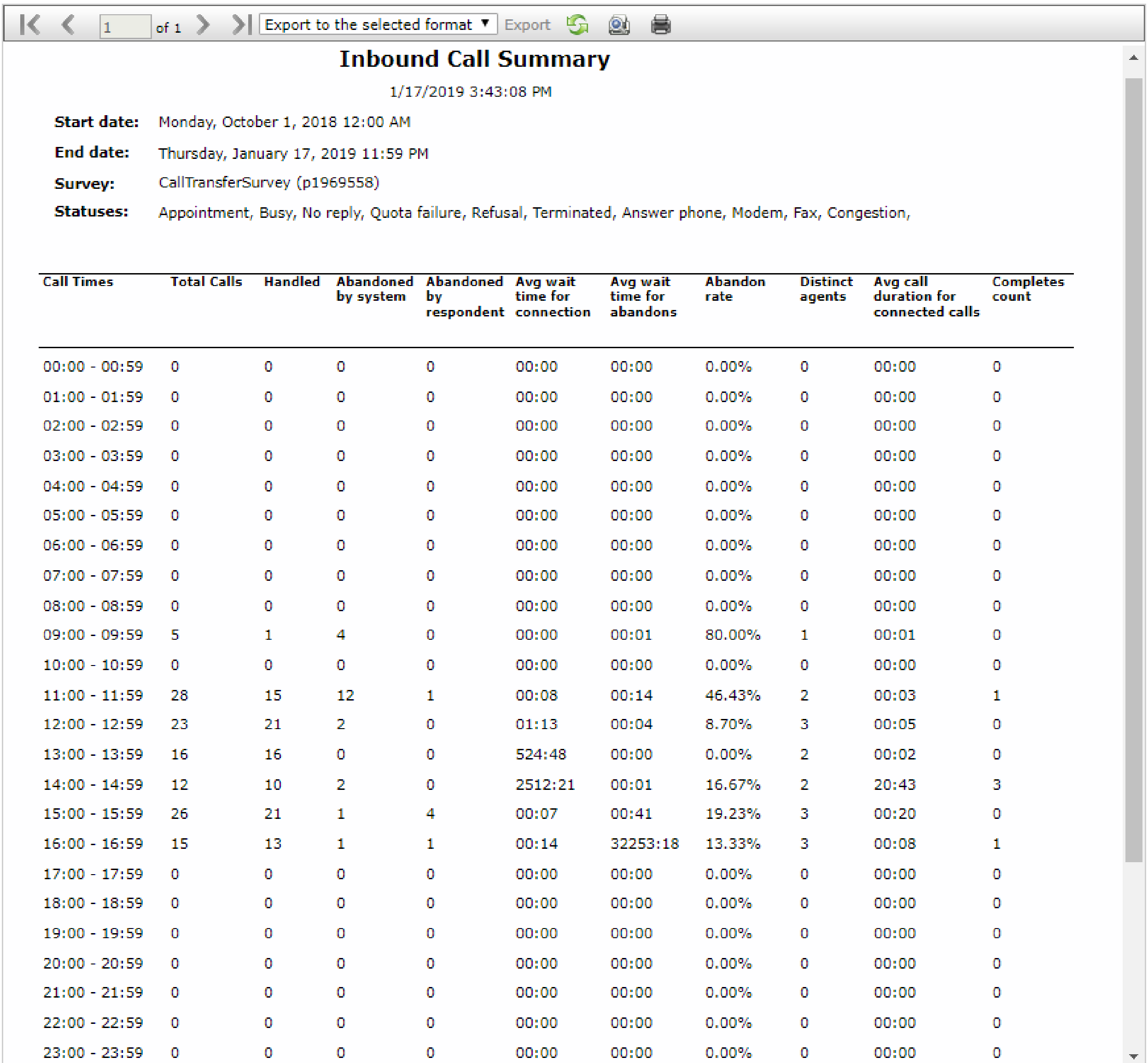


Figure 427 Adjusting the date range for the Sample Utilization Report

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 428 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.

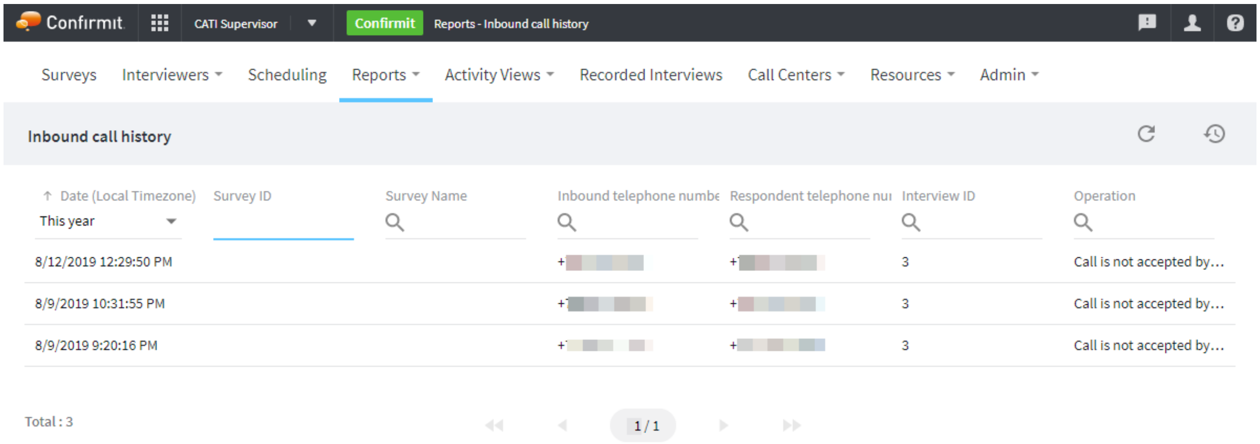


Figure 429 The Inbound Call History log

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.

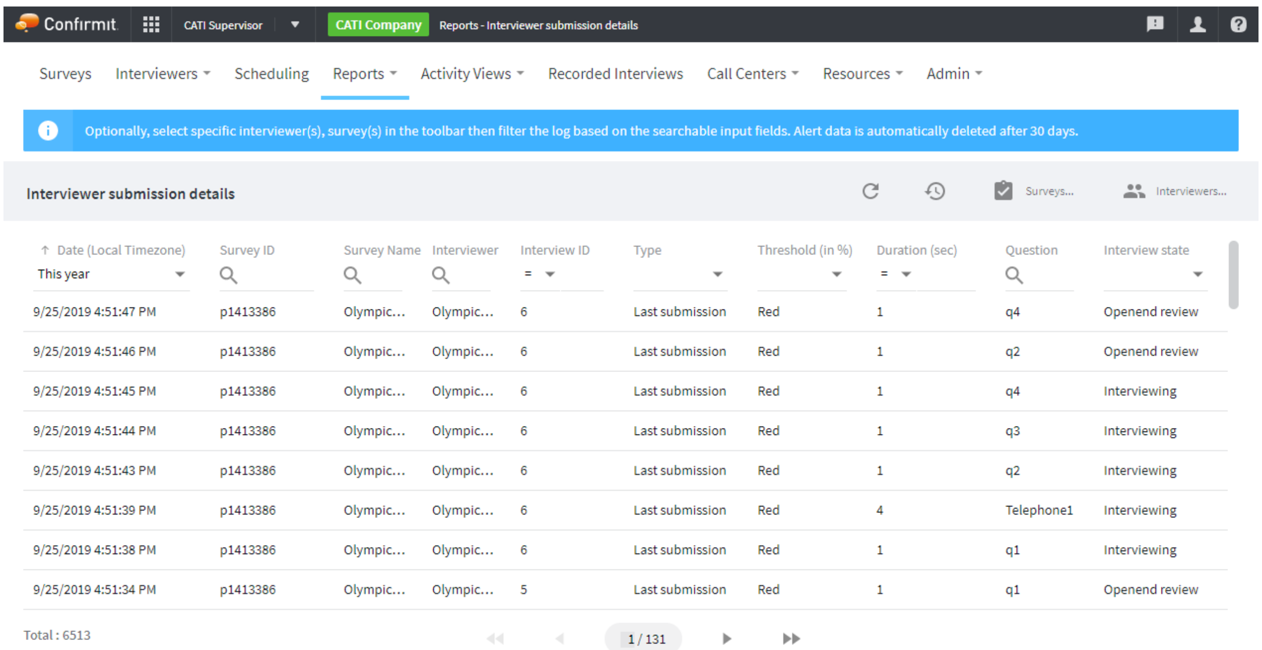
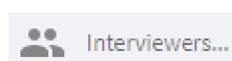


Figure 430 Interviewer Submission Details Log displayed in the top right frame of the CATI Supervisor window

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 window. 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 window. This will allow to specify particular interviewers and interviewer groups for which the log will display information.

   Refer to (go to Selecting Surveys to Display in the Survey List Activity View on page 309 for more information) for description of the Select Surveys dialog window. The Select Interviewers dialog window assumes using the same technique as it is used with the Select Surveys dialog window.

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 - see (go to Viewing the Interviewer Submission Details Log on page 454 for more information) for this log description).

The purpose of this report is to provide aggregated counts of alerts that have occurred and to help identify interviewers that either speeding through the survey or are spending large amounts of time on certain questions.

The report toolbar allows for filtering on the survey(s), interviewer(s), alert type (last submission or quick submission) date range, 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. Choose Reports in the Navigation menu, 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.

   This will display the Interviewer Productivity Report.

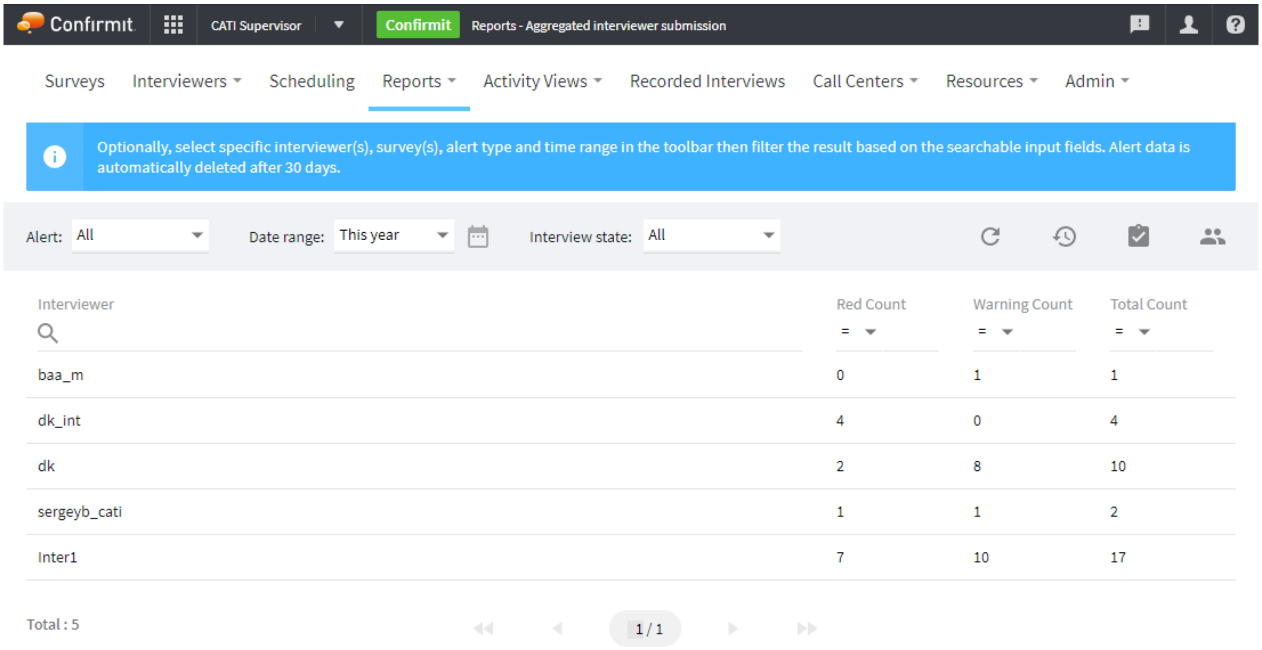


Figure 431 Viewing the Aggregated Interviewer Submission Report

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 window.

   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 window.

   Refer to (go to Selecting Surveys to Display in the Survey List Activity View on page 309 for more information) for description of the Select Surveys dialog window. The Select Interviewers dialog window assumes using the same technique as it is used with the Select Surveys dialog window.

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 the certain 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), refer to (go to Generating the Survey Productivity Report on page 411 for more information) for detailed description of the Date Range filter functionality available in the CATI reports. Also you can 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 will show 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. 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).

7. In case you have filtered the report contents by applying criteria in searchable headers you can remove all filters and display the complete call attempts list by pressing 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 432 Exporting the Report

   This dialog window 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 window.

   This dialog window 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;

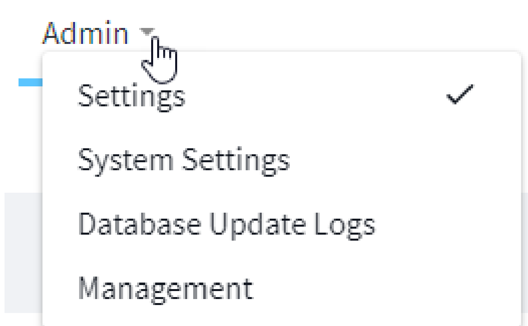


Figure 433 Administration menu

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).

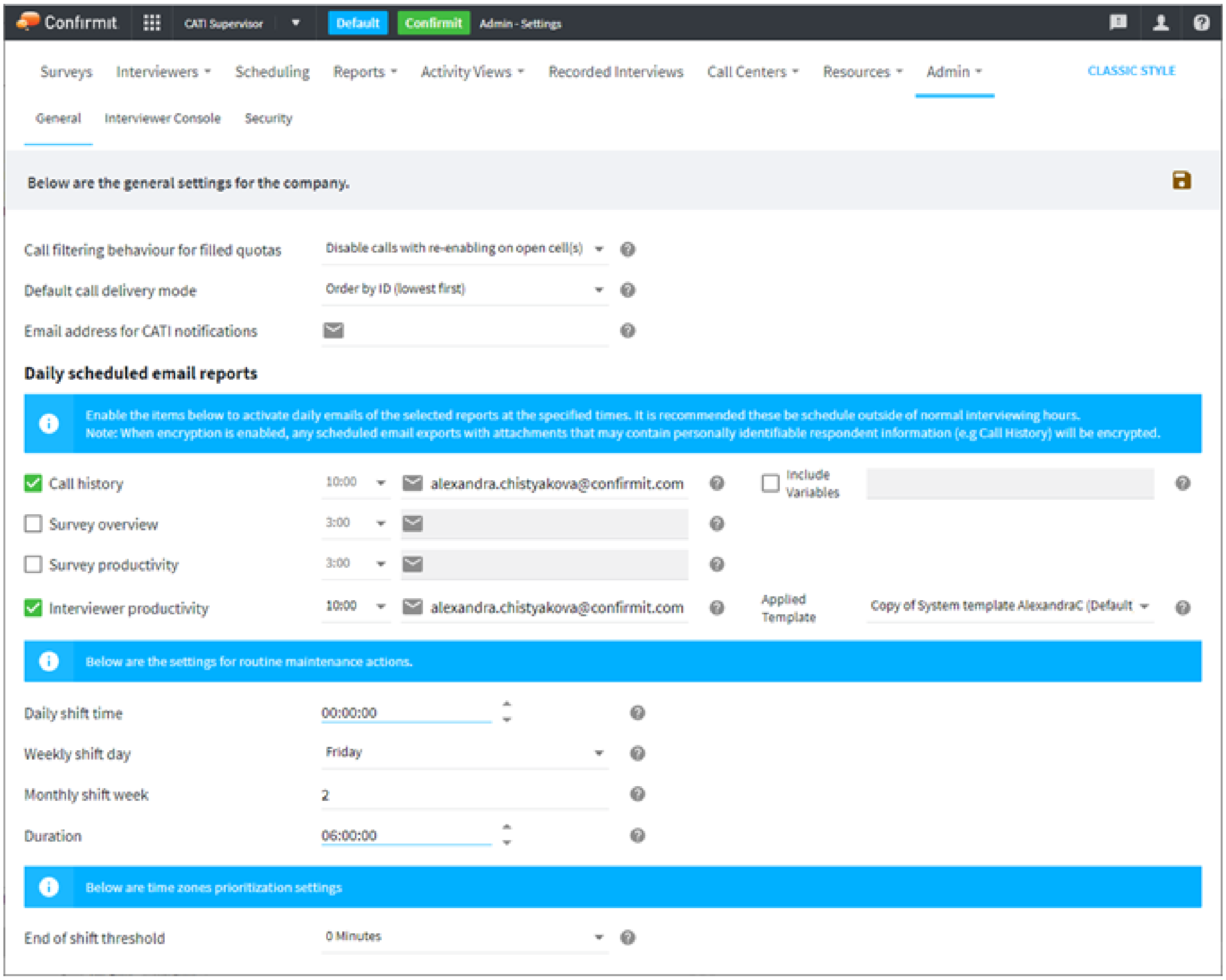


Figure 434 The General tab of the Resources menu

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 135 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 347 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 72 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 466 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 window (see the Include Variables option description in (go to Exporting Call History Data on page 192 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 422 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

This group of settings is located on the Interviewer Console tab.

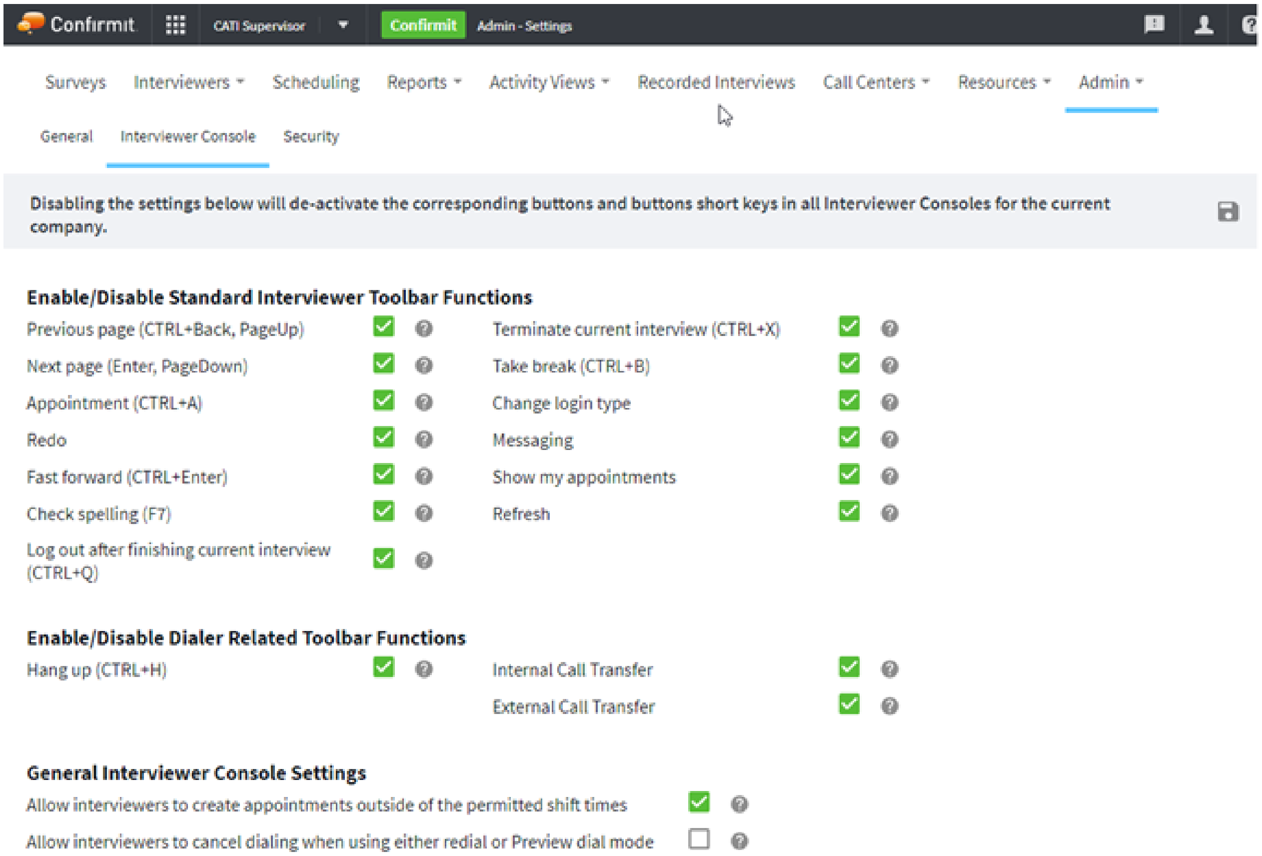


Figure 435 The Interviewer Console tab

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 300 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 286 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 271 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.

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.

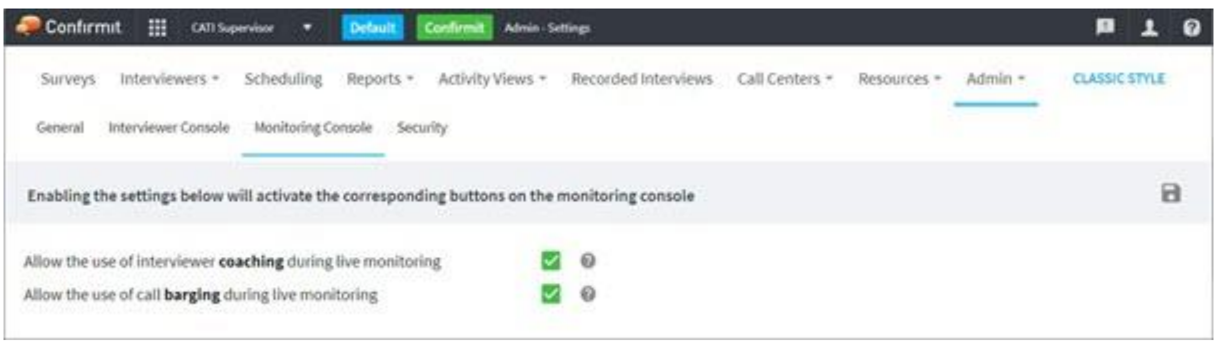


Figure 436 The Monitoring Console settings

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 Interviewer's Work in Real Time on page 325 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.

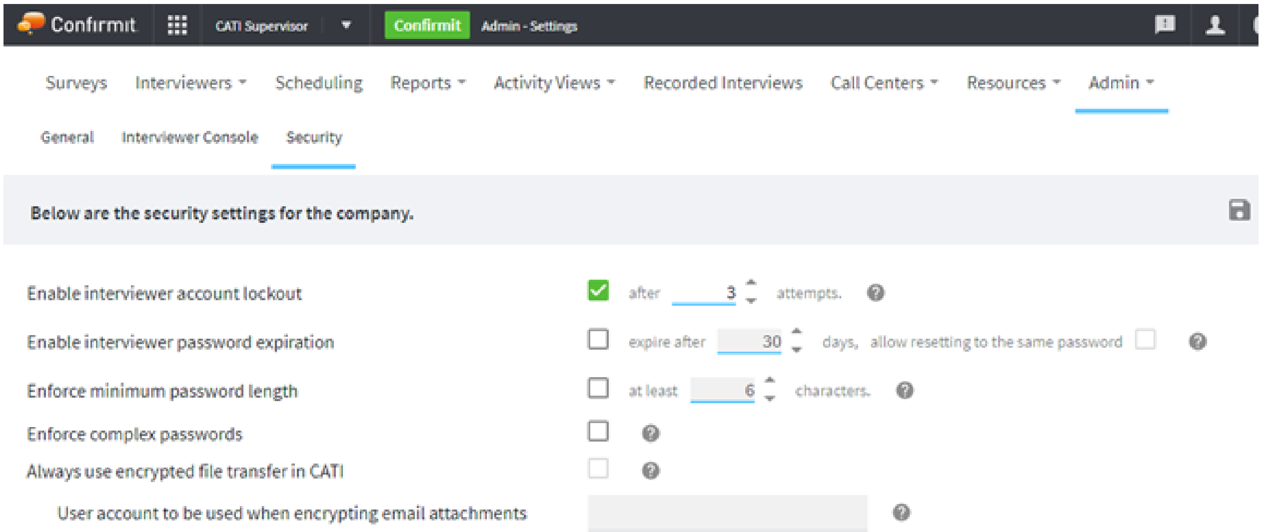


Figure 437 The Security tab of the Resources menu

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 34 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 amount 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 34 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 34 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 amount 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 Confirmit 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 Confirmit Professional Authoring user guide for information regarding these options.

When the above mentioned options are enabled in the Confirmit 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 187 for more information)
- Call History (go to Exporting Call History Data on page 192 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 461 for more information)
- Telephone Number Blacklist (go to Creating and Managing the Telephone Number Blacklist on page 391 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

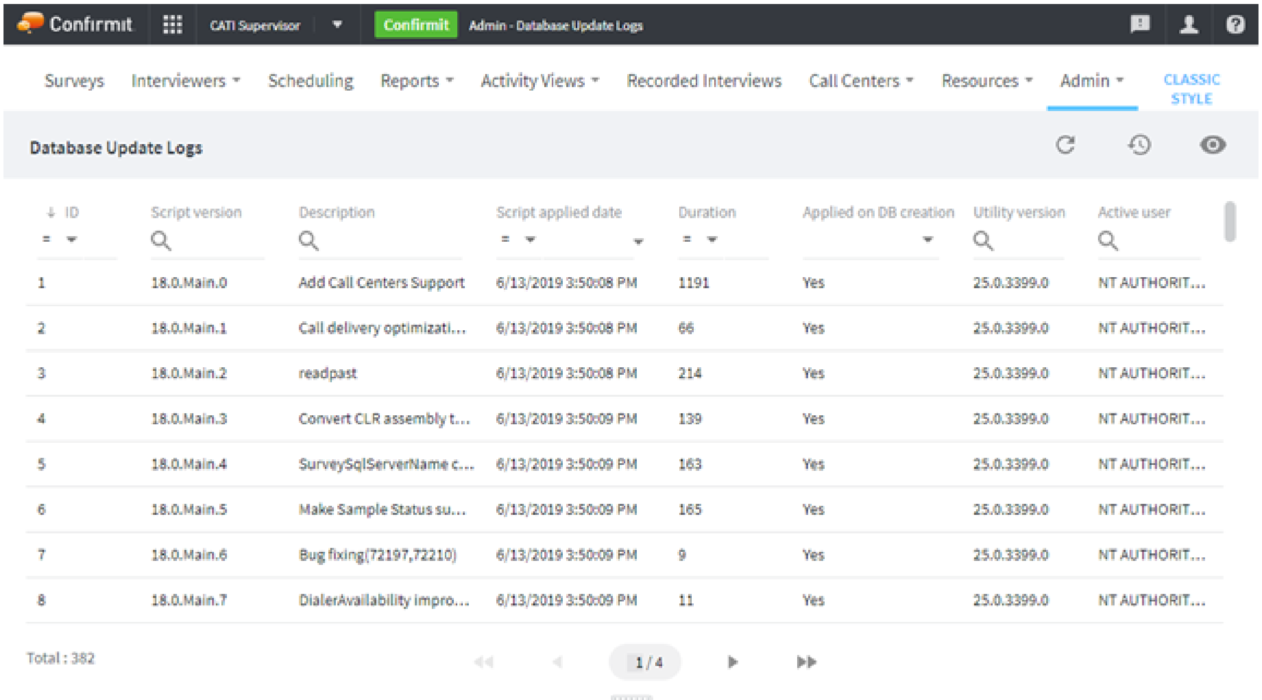
Confirmit system database is upgraded regularly. Usually such upgrade is done with the help of a script which is tailored upon each update to match current upgrade requirements. When the script is run the results of its work are recorded and can be reviewed later.

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.



ID	Script version	Description	Script applied date	Duration	Applied on DB creation	Utility version	Active user
1	18.0.Main.0	Add Call Centers Support	6/13/2019 3:50:08 PM	1191	Yes	25.0.3399.0	NT AUTHORIT...
2	18.0.Main.1	Call delivery optimizati...	6/13/2019 3:50:08 PM	66	Yes	25.0.3399.0	NT AUTHORIT...
3	18.0.Main.2	readpast	6/13/2019 3:50:08 PM	214	Yes	25.0.3399.0	NT AUTHORIT...
4	18.0.Main.3	Convert CLR assembly t...	6/13/2019 3:50:09 PM	139	Yes	25.0.3399.0	NT AUTHORIT...
5	18.0.Main.4	SurveySqlServerName c...	6/13/2019 3:50:09 PM	163	Yes	25.0.3399.0	NT AUTHORIT...
6	18.0.Main.5	Make Sample Status su...	6/13/2019 3:50:09 PM	165	Yes	25.0.3399.0	NT AUTHORIT...
7	18.0.Main.6	Bug fixing(72197,72210)	6/13/2019 3:50:09 PM	9	Yes	25.0.3399.0	NT AUTHORIT...
8	18.0.Main.7	DialerAvailability impro...	6/13/2019 3:50:09 PM	11	Yes	25.0.3399.0	NT AUTHORIT...

Figure 438 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.

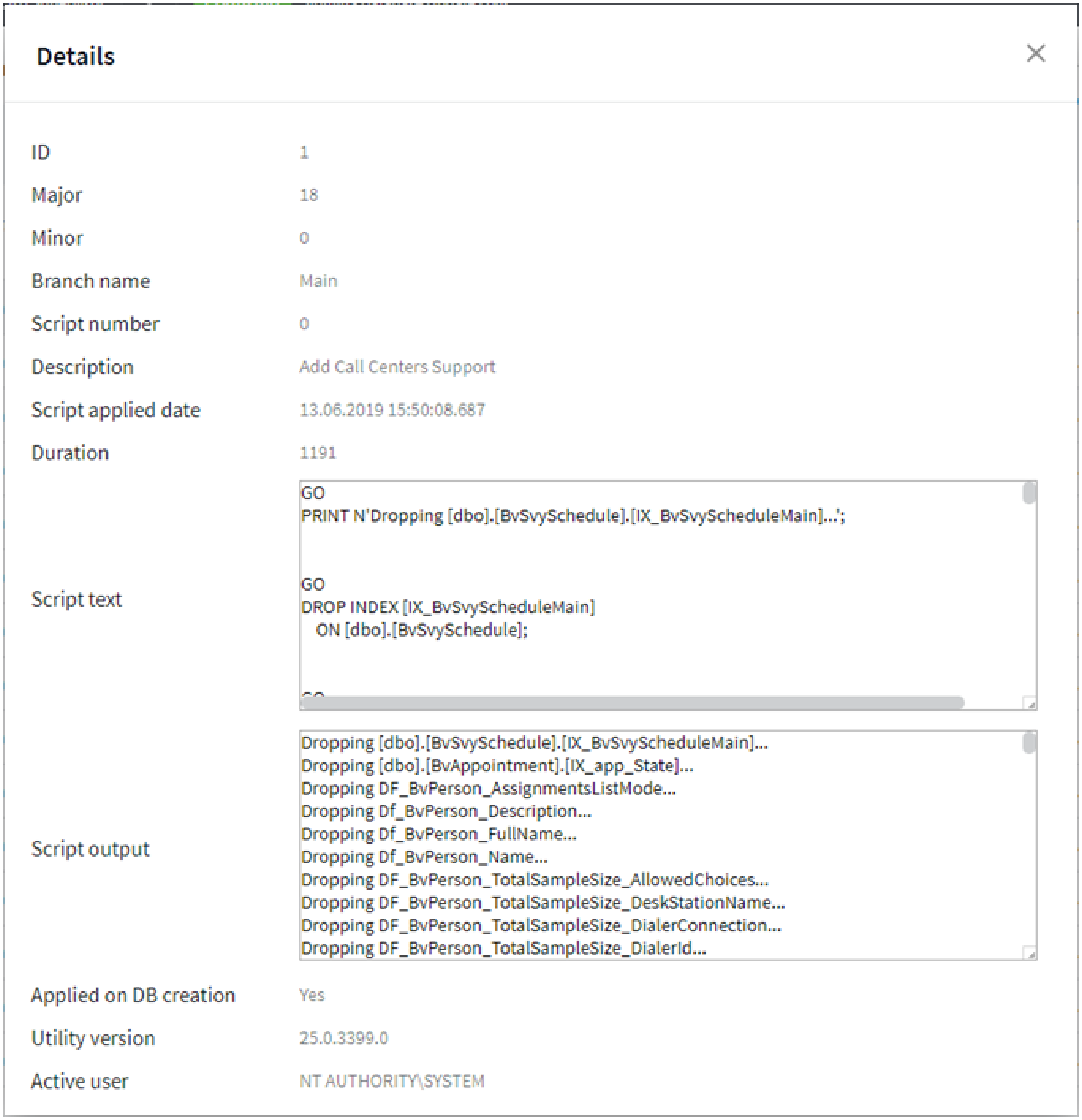


Figure 439 Checking database update details

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

Confirmit 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. Select the Management section in the drop-down menu. This will display a single button and a hint, like in the picture below.

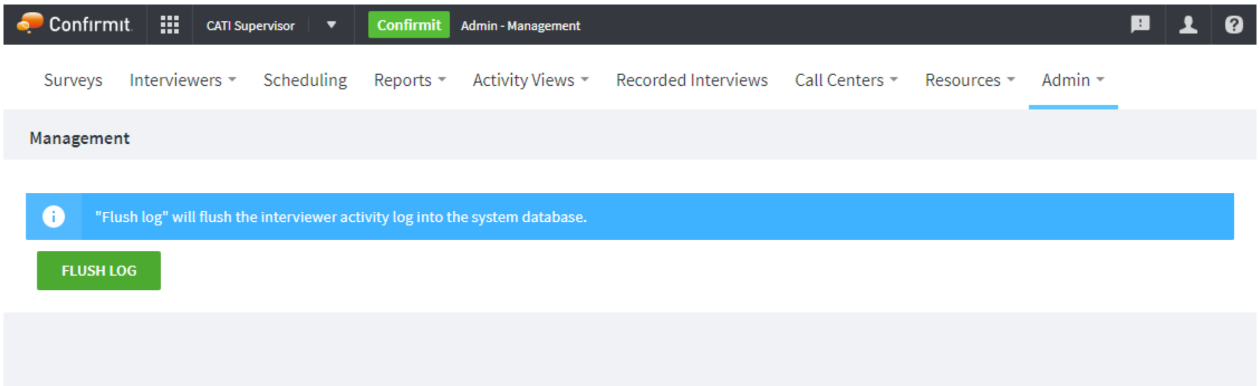


Figure 440 Saving the interviewer activity data manually

2. Click the Flush log button. You will not be prompted, the operation is performed silently. The appropriate data will be saved to Confirmit 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

Below is the list of hot key combinations used to perform actions in CATI Interviewer Console. Also refer to (go to Keyboard Support in the CATI Interviewer Console on page 280 for more information) for hints, limitation descriptions and additional 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. Refer to (go to Interviewer on a Break on page 284 for more information) for information regarding the matter.
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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