CONFIRMIT HORIZONS CATI SUPERVISOR USER GUIDE

Confirmit Horizons V22

This is document revision 2 of the Confirmit v22 CATI Supervisor User Guide, published in April 2017. The information herein describes Confirmit CATI Supervisor and its features as of Confirmit Horizons Build nr. 22.0.1173 (given in the CATI Supervisor Home > Help > About box). New features may be introduced into the product after this revision and build. Go to www.confirmit.com or check "News" on the Customer Extranet for the latest updates.

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.

The following changes have been made in revision 2 of the Confirmit Horizons v22 CATI Supervisor User Guide:

- All screenshots showing navigation menu (left frame with a stack of tabs) are updated throughout the document;
- Providing feedback – new topic added to the Getting Started… section Providing feedback on page 14;
- Calls disabled by FCD/user highlighting and an additional State column in Call Management - see Disabling and enabling calls on page 120 and Viewing the interview/call list on page 110
- Changing call priority from Quotas tab in Survey properties - see Viewing and modifying survey quota settings on page 70;
- Playing back interview recordings in the Reviewer module - see Reviewing an interview on page 157;
- Reserved characters support in a search string - see Working with the Session Overview page on page 165 (end of topic);
- Added a note on the increased amount of parameters users could use with scheduling script - Parametrized scheduling scripts; Viewing and modifying parameters of the scheduling script used with the survey
- Downloading the CATI Console Installation Files – updated screenshot (see Downloading the CATI Console Installation Files on page 232);
- Installing a new copy of CATI Console - updated screenshot and description (see Installing a new copy of the CATI Console on page 234);
- Activity views (most topics) - minor updates regarding options, updated Select surveys dialog, new, more informative screenshots and updated Select Interviewers/Groups dialog (see topics in Monitoring in the CATI Supervisor on page 289 section);
- Possibility of transferring currently applied quota filter into Call Management - see Viewing and modifying survey quota settings on page 70
- All occurrences of the Select Interviewers/Groups dialog description are updated throughout the document (additional Type column). This includes report descriptions and other dialogs.
- A disabled call is not shown in the Count column on the Assignments tab - added a NOTE toViewing and modifying the survey assignments on page 66;
- Change Call Group command (context menu in the Interviewers list) - see Changing a call group for an interviewer on page 57;
- Setting to disable the option to allow appointments to be created outside of the defined shifts - see Interviewer Console settings group on page 367 & Making an appointment on page 274;
- "New Interviewer" and "New Group" buttons - images and names are updated

- the "Recent" checkbox added to Add\Replace Assignments dialog - see Adding and replacing survey assignments directly from the interviewer list on page 46 & Adding and replacing survey assignments directly from the interviewer group list on page 25
- New settings available in Settings/General settings (refined description of the disabled call re-enabling on quota cell re-opening) - seeConfiguring settings related to the entire company on page 364
- Changing quota limit for a number of cells simultaneously - see Viewing and modifying survey quota settings on page 70
- Open/Close Quota cells - see Viewing and modifying survey quota settings on page 70
- Enable/Disable calls (changed labels) - see Viewing and modifying survey quota settings on page 70
- Save button removed from toolbar (saving changed items is not mandatory for the Quotas tab anymore) - see Viewing and modifying survey quota settings on page 70
- Viewing calls belonging to closed cells in Call Management - see Call Management on page 109;
- Ability to track time spent on open end reviewing - see Generating the Interviewer Productivity Report on page 385;
- Connect/Activate & Disconnect/Deactivate dialer operations - see the following topics: Dialer on page 341; Connecting, configuring and disconnecting the Dialer on page 345; Working with a number of dialers on page 350;
- Quota Progress report - Generating the Quota Progress Report on page 394;
- Active Call Distribution turned into Distribution of Dialer Calls dialog - see Viewing distribution of dialer calls on page 107.

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

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.

Table of Contents

1 Getting started with the CATI Supervisor

1.1 The CATI Supervisor prerequisites overview

The CATI Supervisor is a web-based application, which is accessed by means of an internet browser. Access to the CATI Supervisor can be exercised both from the Internet, and from within the Intranet. The CATI Supervisor interface is displayed in the browser windows.

Note: The following browser types are currently supported by CATI Supervisor: Internet Explorer version 8, 9, 10 and 11, Chrome and Firefox.

To be able to work with Confirmit and the CATI Supervisor module and perform certain operations you should configure the Internet Explore settings in the way described below. These changes must be applied before you start working with Confirmit and the CATI Supervisor.

First of all you should allow pop-up windows to be opened for Confirmit and the CATI Supervisor module. This can be done in advance (before you open any of these pages), or when you open any of these pages and see the Internet Explorer information bar warning you that pop-up windows are blocked.

To allow pop-ups from Confirmit and the CATI Supervisor module before you open any of these pages:

1. Choose Tools in the Internet Explorer menu bar, then choose Pop-up Blocker, and then click Pop-up Blocker Settings.
2. In the Address of website to allow field, type the address (URL) of the website you want to see pop-ups from, and then click Add.

To allow pop-ups from Confirmit and the CATI Supervisor by using the Internet Explorer Information Bar:

1. When Information Bar is displayed in the Internet Explorer (after you navigate to the Confirmit or CATI Supervisor page) notifying you that a pop-up has been blocked, you should right-click this information bar.
2. Then choose Always show pop-ups from this site command from the context menu that appears. This will permanently allow the pop-up windows to be displayed by Confirmit and the CATI Supervisor module.

You should also configure the Internet Explorer settings so that operations such as interviewer monitoring and scheduling script export could be performed.

To configure the Internet Explorer for work with Confirmit and the CATI Supervisor module:

1. Choose Internet Options from the Tools menu in the Internet Explorer.
2. This will display the Internet Options dialog box. Choose the Security tab.
3. Choose the Trusted Sites icon. Press the Sites button below. This will display the Trusted Sites dialog box.
4. Enter the URL of the Confirmit main page in the Add this website... field and press the Add button to the right of this field. Repeat the procedure entering the CATI Supervisor main page URL.
5. Next press the Custom Level button in the Security Level group below. This will display the Security Settings dialog box.
6. Scroll down the option list until you reach the "Automatic prompting for file downloads" option. Set this option to Enable.
7. Also set the "File download" option to Enable.
8. Press OK to save the changes and return to the Security tab in the Internet Options dialog box.
9. Next, in the Internet Options dialog box, choose the Advanced tab. Scroll down the Settings list until you reach the "Do not save the encrypted pages to disk" option and disable it (uncheck the box).
10. On the Advanced tab, scroll the Settings list until "HTTP 1.1 settings" are reached, and enable both "Use HTTP 1.1" and "Use HTTP 1.1 through proxy connections" options (check the corresponding boxes).
11. Press OK in the Internet Options dialog box to save the Internet Explorer settings.

It is recommended to study the list of existing limitations which are applied to certain CATI Supervisor functions - please refer to Appendix B - Known limitation list on page 424.

1.2 Appearance and user actions in the CATI Supervisor module

The CATI Supervisor module uses the object oriented approach in its graphical user interface. All system objects are divided into types for convenience – Surveys, Interviewers, Resources etc. The CATI Supervisor module provides navigational functions that allow user to clearly locate the object according to its type and residence in an object group. When the user navigates to the object, he/she can perform operations with that object.

The main CATI Supervisor module interface is displayed in the browser window.

The main application window uses a framed layout. It contains the following frames:

- A header frame, displaying the module name, logo and Help button;
- The left frame, containing the Navigation menu;
- The top right frame, used to display the list of objects of the selected type;
- The bottom right frame, used to display properties, settings etc. of the selected object.

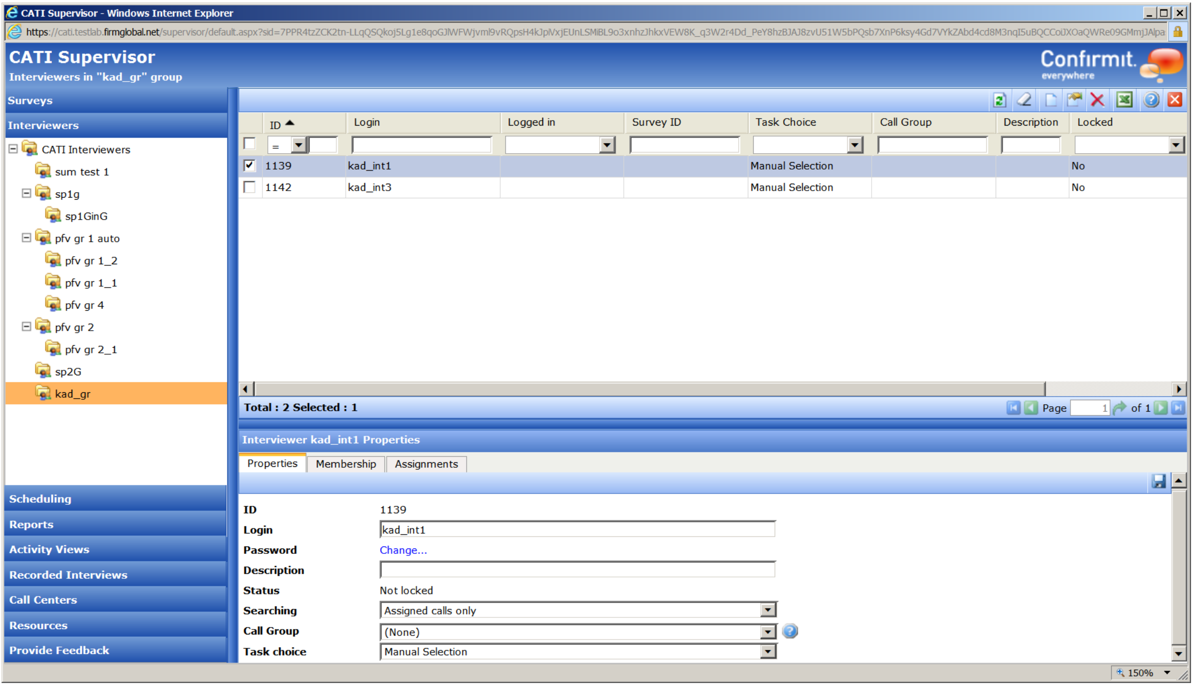


Figure 1 The CATI Supervisor main window

The left (Navigation) frame is resizable – the user can increase or decrease its width by dragging the frame border. The same goes to the top and bottom right frames – the frame border can be moved (and frame vertical size can be changed) by dragging.

The CATI Supervisor module uses a three-level hierarchical structure. The first (highest) level is occupied by the object types. Object types are represented as buttons in the Navigation Menu. Selecting a button (an object type) takes the user to the second level. The second level is occupied by the object groups. Object groups for some object types can be presented as a tree list, which is an additional grouping, providing the convenient way of organizing objects by their attributes. The third level is occupied by objects belonging to an object group. To navigate to a particular object the user should first display the list of objects belonging to the group. The list of objects belonging to the group is displayed in the top right frame.

Typically the user starts working with the system by navigating to the required object. To do this the user must first use the Navigation Menu located in the left frame and select an object type here. The object type menu unfolds and displays the list of object groups. Next the user should select the object group that contains the required object and choose the command that would display the list of objects belonging to that group.

The list of objects belonging to a group is displayed in the top right frame (certain object types do not use the bottom right frame, so the list of objects is displayed in the right frame).

When the object list is displayed in the top right frame, the user can choose an operation to perform with the particular object (or with a number of objects simultaneously).

Some operations (like, for example, the View operation performed on a survey) require additional configuration, or just display some information as an execution result. Such information (or configuration settings) is displayed in the bottom right frame, which may use the tabbed interface to display data. If the bottom right frame contains configuration settings, and the user modifies any of them, they should press the SAVE button to apply modified configuration settings.

Certain operations with objects and object groups can be performed in separate dialog windows, which open when the user chooses the appropriate command. An example of such is a dialog window used to add a new survey to a group.

Some windows incorporate tabs with fields grouped according to their functions (like in the window illustrated below).

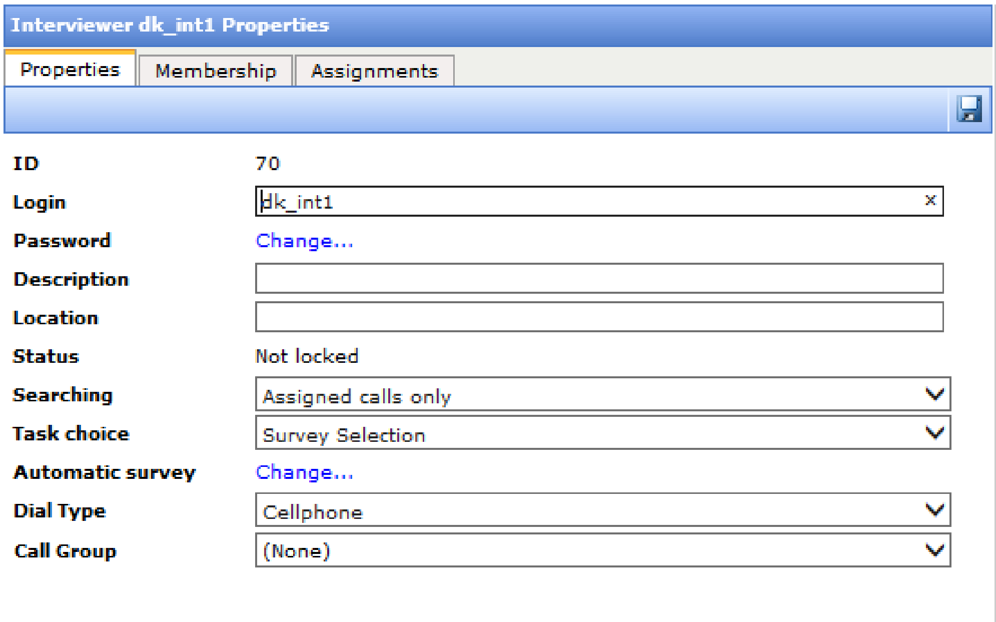


Figure 2 The tabbed interface used with the dialog window

The user should enter the required values and press OK in this dialog window to perform the configured operation.

1.3 Main GUI elements of the CATI Supervisor module

1.3.1 Navigation menu

The Navigation Menu is located in the left frame of the CATI Supervisor module window. The Navigation Menu in the CATI Supervisor module in fact is a list of object types. The Navigation Menu is represented by a group of vertically stacked buttons bearing the object type names. Any menu button provides access to groups of objects of one particular type. Menu button names prompt the user, which type of objects can be accessed with the use of this particular menu. Operations with objects belonging to an object type are not directly represented in the Navigation Menu. The user must first access the particular object type (navigate to it) to perform operations on objects of that type.

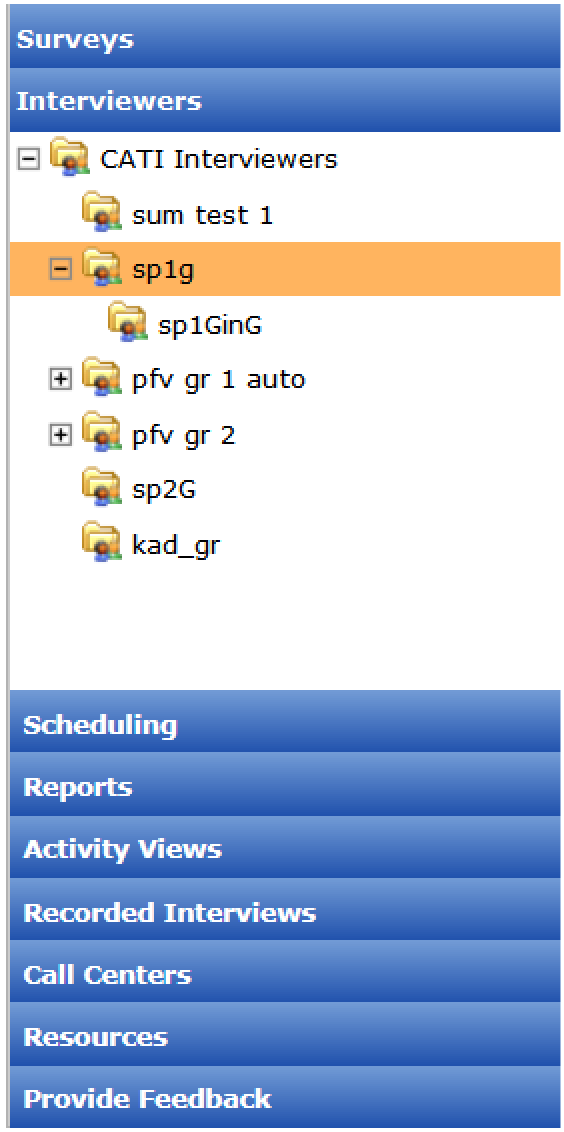


Figure 3 The Navigation menu (the left frame)

The following object types are accessible from the Navigation menu:

- Surveys
- Resources
- Interviewers
- Scheduling
- Reports
- Activity views
- Recorded Interviews
- Call centers

Clicking any menu button unfolds a list of object groups. For some object types the object groups are organized as a tree list.

1.3.2 Tree lists and operations with tree elements

Selecting an object type in the Navigation Menu unfolds the list of groups of objects of that type. For some object types the object groups are represented in the form of a hierarchy tree. A plus sign near the root object level name indicates that some object groups of that type already exist. Clicking the plus sign (or doubleclicking the root level name) unfolds the group list.

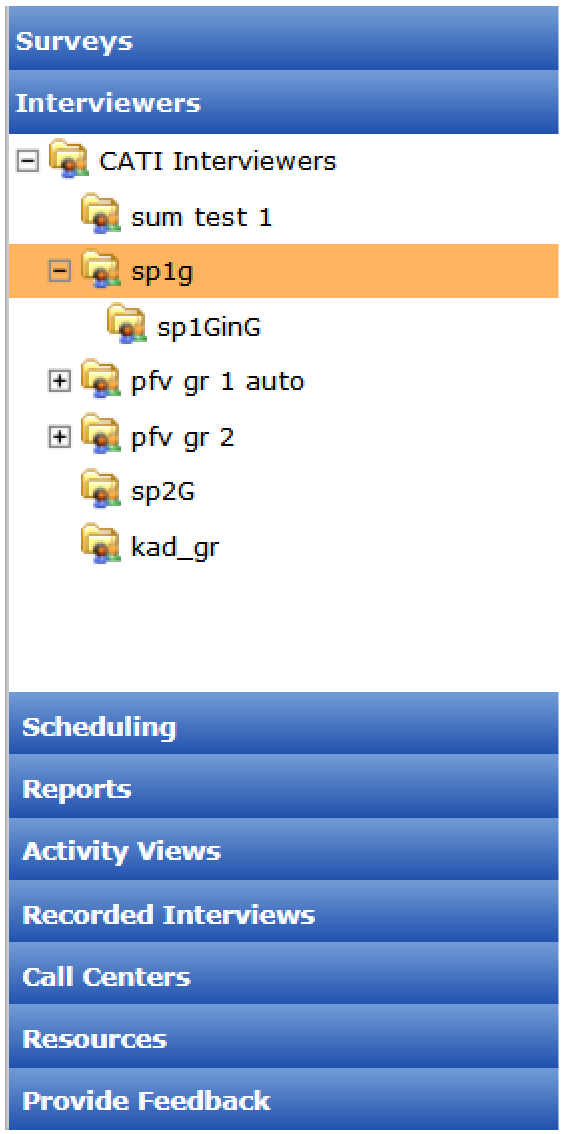


Figure 4 Hierarchy tree in the Navigation menu

The menu for some object types allows creation of new object groups. Some object types in the navigation menu do not use a tree list to represent object groups. However some object types are static and do not permit items to be added.

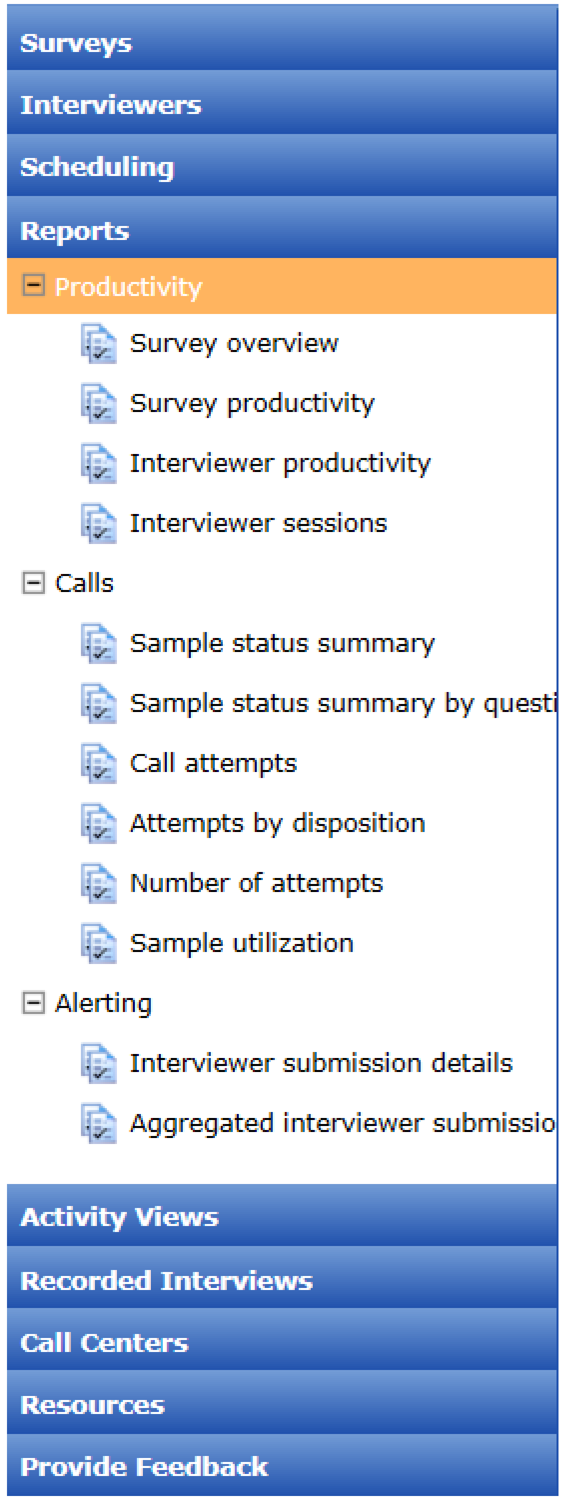


Figure 5 Object groups in the Navigation menu

Objects can be accessed from the object groups, which act as a kind of folders, designed for organizing objects.

Any tree item (a node item, or an object group) has a shortcut menu associated with it. The user should right-click the item name to get access to this shortcut menu. A shortcut menu usually provides the user with a list of operations, such as create, or delete a node item or an object group, or view the list of objects belonging to an object group. The list of possible operations with object groups (and node items) is different for each object type.

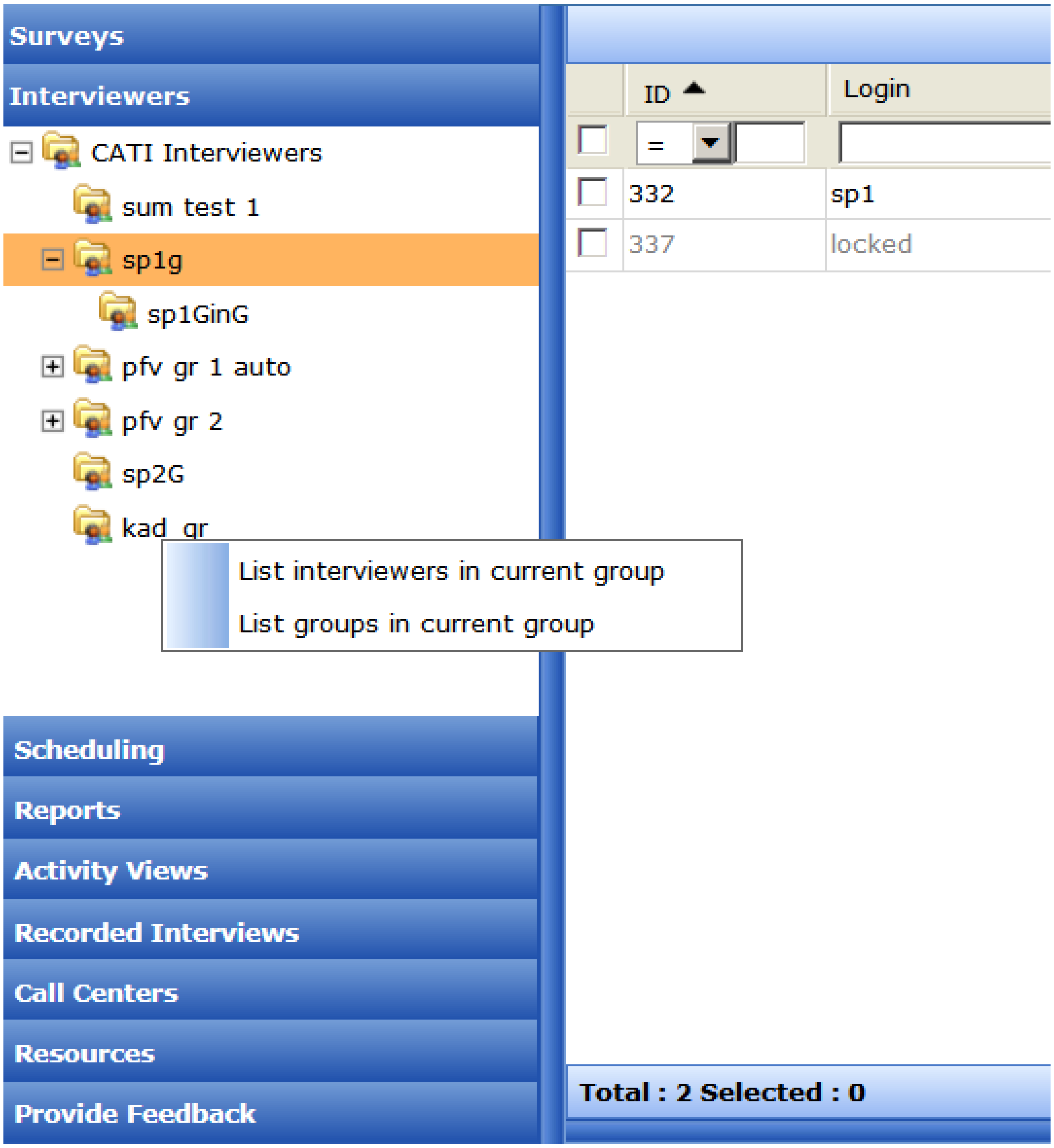


Figure 6 Example of a context menu used with the Navigation menu items

The user can access a list of objects contained in the group in either of two ways:

- By double-clicking the appropriate object group name in the menu frame;
- Through the use of the shortcut menu, which is activated by right-clicking the appropriate object group name. The user must select the List command from this shortcut menu then.

Objects of the chosen group are then displayed in the top right frame of the application window.

1.3.3 Object list

When the user chooses to display the list of objects belonging to a particular group of objects, this list appears in the top right frame and the user has access to it's control elements. These allow for operations to be performed with the objects of that type. The object list is displayed as a grid. Each grid row displays details pertaining to a certain object. The grid layout is different for each object type.

The top right frame contents may look somewhat like this.

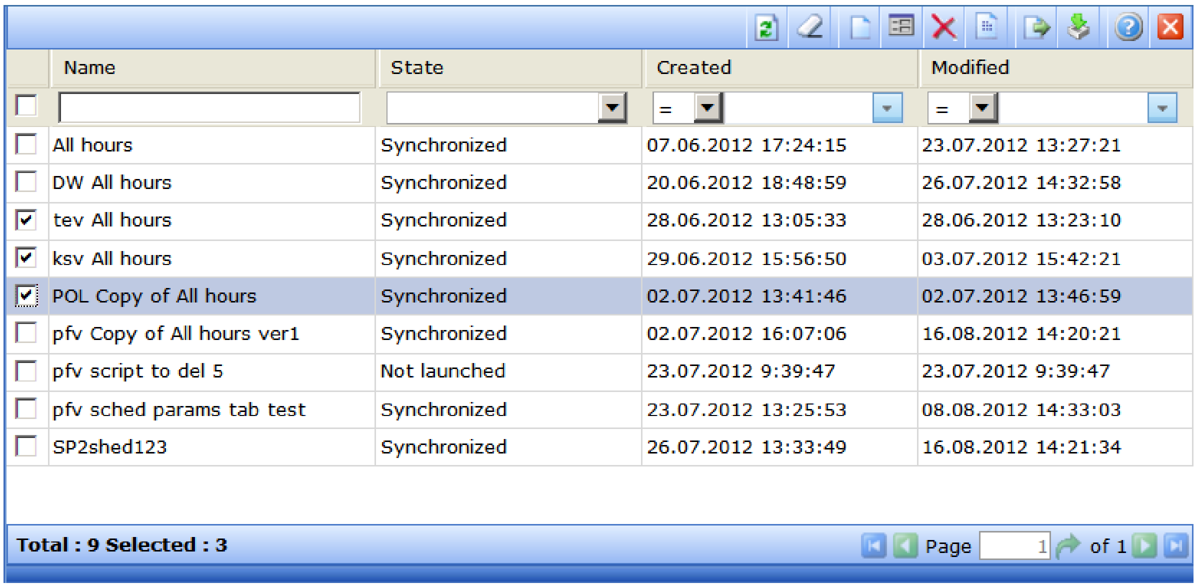
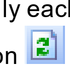


Figure 7 Example of the top right frame contents

The grid in the top right frame can contain the list of objects of the currently chosen type in case the list was already populated with objects. Otherwise the grid is displayed empty. All the objects the user creates are added to that list.

The top right frame title bar displays names of the object type and of the group this object belongs to. This title bar also displays a set of buttons in the right part. This button set includes buttons corresponding to operations that can be performed with the listed objects (this set is different for each object type), and buttons, which can be used for operations on objects of all types and for customization of the grid layout (these buttons are similar for all object types).

The object list in the grid is refreshed automatically each time a new object is added to or deleted from the list.

Alternatively the user can press the Refresh button  on the toolbar to refresh the list manually when it is required.

The user can perform certain operations on a number of objects from the grid simultaneously. Objects are selected by checking boxes in the leftmost columns of the appropriate rows. If required, the user can clear all the selections at once by pressing the Clear Selection button  on the toolbar. Commands supporting batch object processing are described in the appropriate sections of this guide.

1.3.4 Browsing the grid

The left part of the bottom bar in the top and bottom right frames displays information on the amount of records – the total and the number of currently selected records. The right part of this bottom bar contains the grid browsing controls and also displays the number of the currently viewed grid page and the total amount of grid pages that the object list contains.

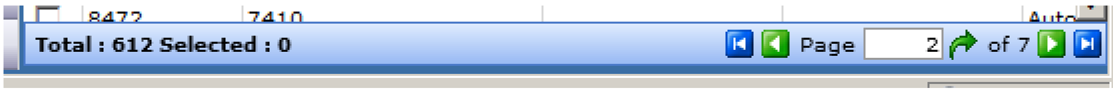


Figure 8 Grid browse controls

Usually each grid can display no more than a certain predefined number of items at a time. Most of the times the list of items exceeds this number. This means that if an item you need is not shown in the current view (page), you should browse the grid pages to locate it.

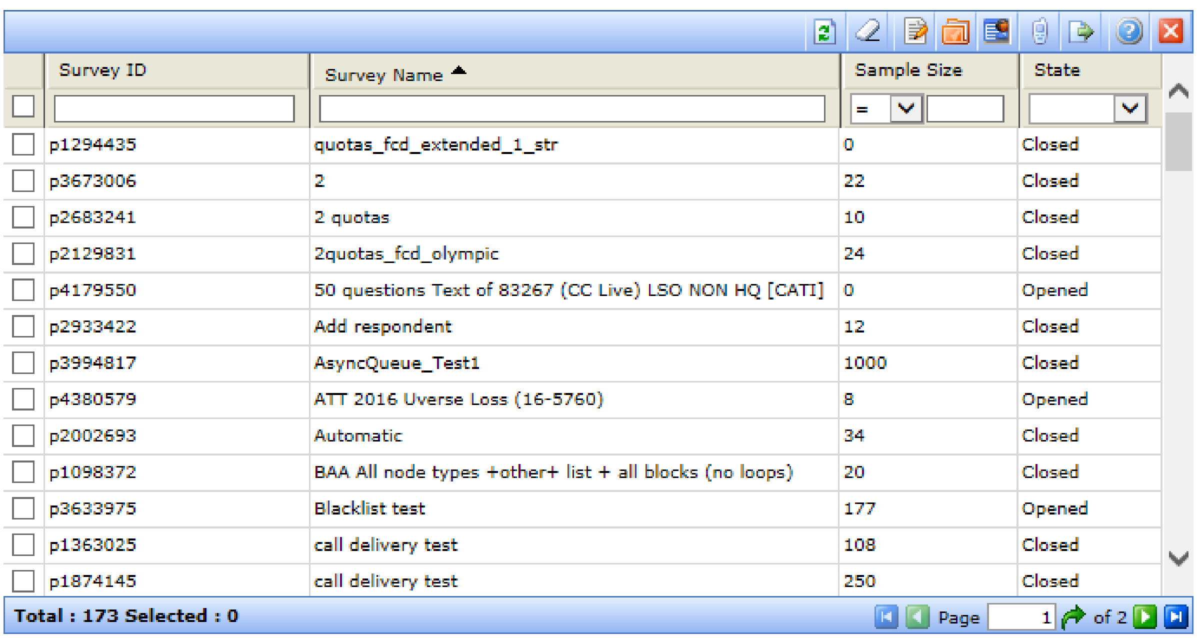
You can browse the grid pages (if items are presented on a number of pages) by switching to the next /previous page, jumping to the first /last page, or jumping to a particular page by typing its number in the Page Number field and pressing Enter on the keyboard, or the Go button next to the field .

1.3.5 Sorting objects in the list

You can sort the contents of any object list displayed in the grid. Objects can be sorted by any column in the ascending or descending order.

Each column contents can be sorted in ascending or descending order.

You can instantly sort the table contents by a column by simply clicking the column header – each subsequent click changes column sorting from ascending to descending and back. The sorting order is indicated with a triangle icon displayed in the column header.



Survey ID	Survey Name	Sample Size	State
p1294435	quotas_fcd_extended_1_str	0	Closed
p3673006	2	22	Closed
p2683241	2 quotas	10	Closed
p2129831	2quotas_fcd_olympic	24	Closed
p4179550	50 questions Text of 83267 (CC Live) LSO NON HQ [CATI]	0	Opened
p2933422	Add respondent	12	Closed
p3994817	AsyncQueue_Test1	1000	Closed
p4380579	ATT 2016 Uverse Loss (16-5760)	8	Opened
p2002693	Automatic	34	Closed
p1098372	BAA All node types +other+ list + all blocks (no loops)	20	Closed
p3633975	Blacklist test	177	Opened
p1363025	call delivery test	108	Closed
p1874145	call delivery test	250	Closed

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

1.3.6 Searching for objects in the list

You can search for particular objects in the object list. This means you can apply a filter to one or a number of grid columns displaying object properties and reveal only object(s) that match the search criteria. Other objects will then be hid from view, and the object list will contain only objects you need. This functionality is available almost in any CATI Supervisor window interface.

If the grid header row contains text fields, drop-down lists this means you can use these controls to search for specific objects. Such header row may look somewhat like this.

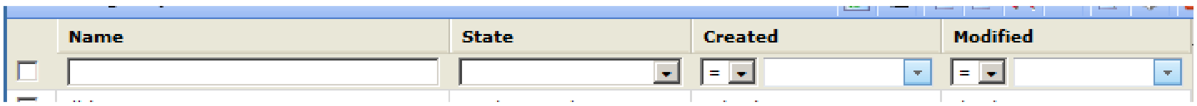


Figure 10 Grid header row with search functionality

The string you enter in any of these fields in the header row acts like an instant filter condition. When applied, this filter allows hiding records that do not match the entered condition while showing those that match it.

There are three types of such "filter" fields - a simple text field, a text field combined with an operator drop-down list, and a drop-down list containing available values only.

A search string you enter into the text field can contain any symbol combination, wildcards are also allowed.

If you enter a search string into the text field which is combined with the operator drop-down list, you should also select an operator from this drop-down list.

A drop-down list allows selecting only values contained in this list.

You can apply any number of filters simultaneously. In that case filtering conditions will be united using AND logical operator - in other words, all applied filters will be combined.

To apply the filter you should press Enter on the keyboard, or press the Refresh button on the toolbar above the grid. This will force the frame refreshing.

To remove a particular filter you can:

- For the text field - clear the field completely;
- For the combined field - clear the text field and choose "equal" operator from the drop-down list;
- For the drop-down list - choose an empty value.

After the filter condition is removed from the field you should refresh the frame by pressing either Enter, or Refresh button on the toolbar.

Please note that column sorting (see Sorting objects in the list on page 10) works on the filtered list.

1.3.7 Selecting objects in the list

Before you apply an operation to the object you should first select this object. When you apply an operation with no object selected, CATI Supervisor prompts you to select an object first. 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.

A single object can be selected by simply 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.

When you need to select a number of random objects, you can do that by checking boxes in the grid rows corresponding to these objects.

All objects currently displayed on the grid page can be selected at once by checking the box in the leftmost column in the header row. This will automatically check all the selection boxes inside the grid.

Pay attention that checking a box in the header row selects only objects displayed on the current page of the grid. This means that if this object list contains more than one page, objects on other pages would not be selected. See the context menu command alternative described in the instruction below - you can use this procedure to apply a command to all objects currently included in the list.

Keep in mind that any selection you make on a grid page is 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 case you need to perform an operation on objects that are listed on different grid pages, you have to make a selection on one page, perform the required operation for the selected objects, then move to another page, create another selection on this page, and perform the required operation again.

To check if the object list occupies more than one grid page look at the browsing controls located in the bottom right corner of the frame (see Browsing the grid on page 9 for information on the grid browsing controls).

The total number of objects included in the grid, and the number of currently selected objects is shown in the left part of the bottom bar of the frame (below the grid) - the"Total" and "Selected" figures respectively.

To deselect the selected object you need to clear the respective box.

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

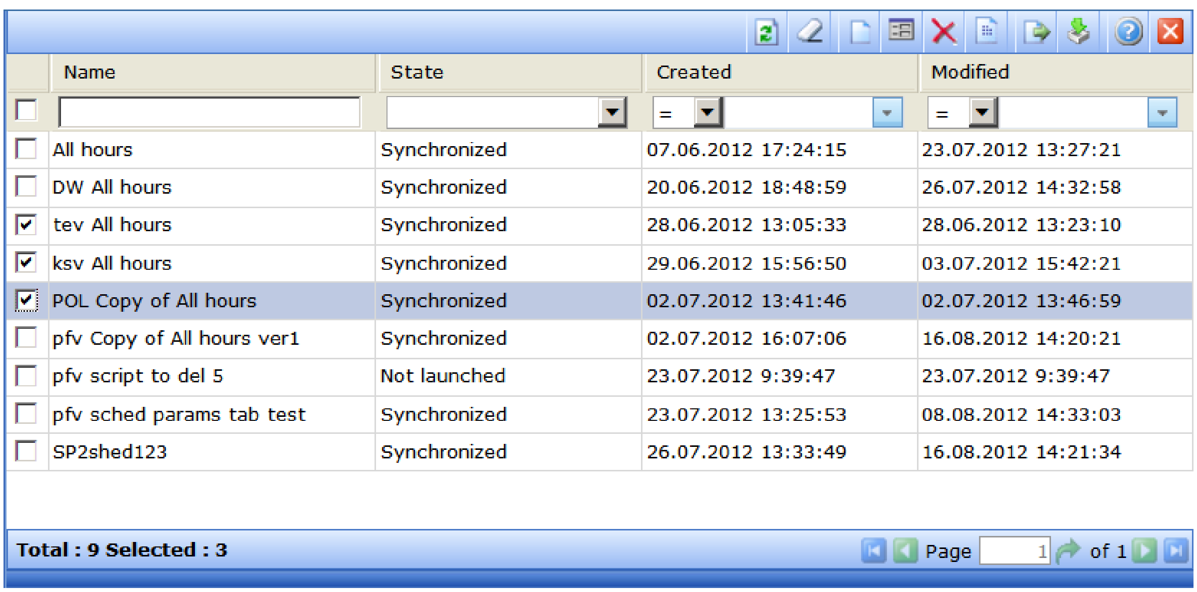


Figure 11 Three objects selected on the grid page

After you create a selection, you can apply an operation to the selected items. To do this you can either press 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 CATI Supervisor can be applied either to the items which are currently selected in the grid, or to all objects currently included in the list. Always be sure to choose the corresponding option - see the instruction below for details.

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

1. Certain context menu commands in CATI Supervisor are not performed instantly. Instead they reveal a sub-menu with the following choice:

- 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 case you need to apply an operation to a single object which you have just righ-clicked upon to display the context menu.
3. In case 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, you should choose the "Entire List" option. The "Entire List" 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 some objects. This is the case when the list was filtered with the help of the "searchable header" facility - see Searching for objects in the list on page 11 for details.

1.3.8 Object properties view

The bottom right frame is used to display the properties and different configuration settings of an object selected in the grid in the top right frame. If the user chooses to view properties, or parameters of the currently selected object, the selected parameter set is displayed in the bottom right frame. The appearance of the displayed parameter sets is different for each selected object. The bottom right frame can use the tabbed interface. Some tabs are merely informational, and some can contain editable settings.

The bottom right frame title bar displays the current setting type and the name of the object, which setting is displayed. Title bar can also display a toolbar containing buttons corresponding to the currently displayed settings.

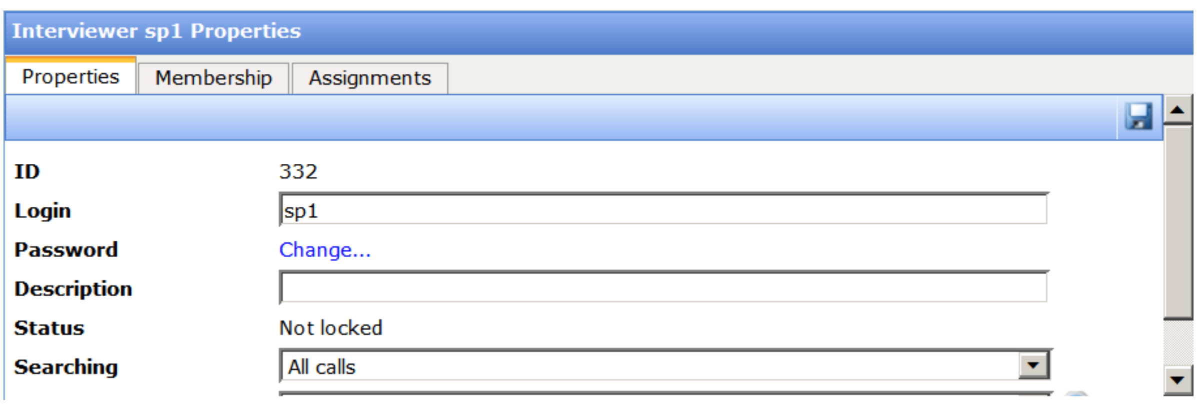


Figure 12 Contents of the bottom right frame - an example

In general the appearance and control elements used in the bottom right frame are similar to those used in the top right frame.

Please consult the Object list on page 9 section for a description of these user interface elements.

If the bottom frame toolbar contains the Save button, and the user modifies any setting on any tab in the bottom frame, they should press the Save button to apply the changes. If the user chooses to view another object settings without saving modified settings of the currently selected object, all changes will be discarded.

1.4 Providing feedback

Any person currently logged into the CATI Supervisor module can provide feedback on their experience regarding work with the software. This can either be a suggestion for improvement, or a description of a bug, erroneous behavior.

To provide feedback please choose the Provide feedback link in the Navigation menu in the left frame. This opens the Provide feedback dialog window, see the picture below for illustration.

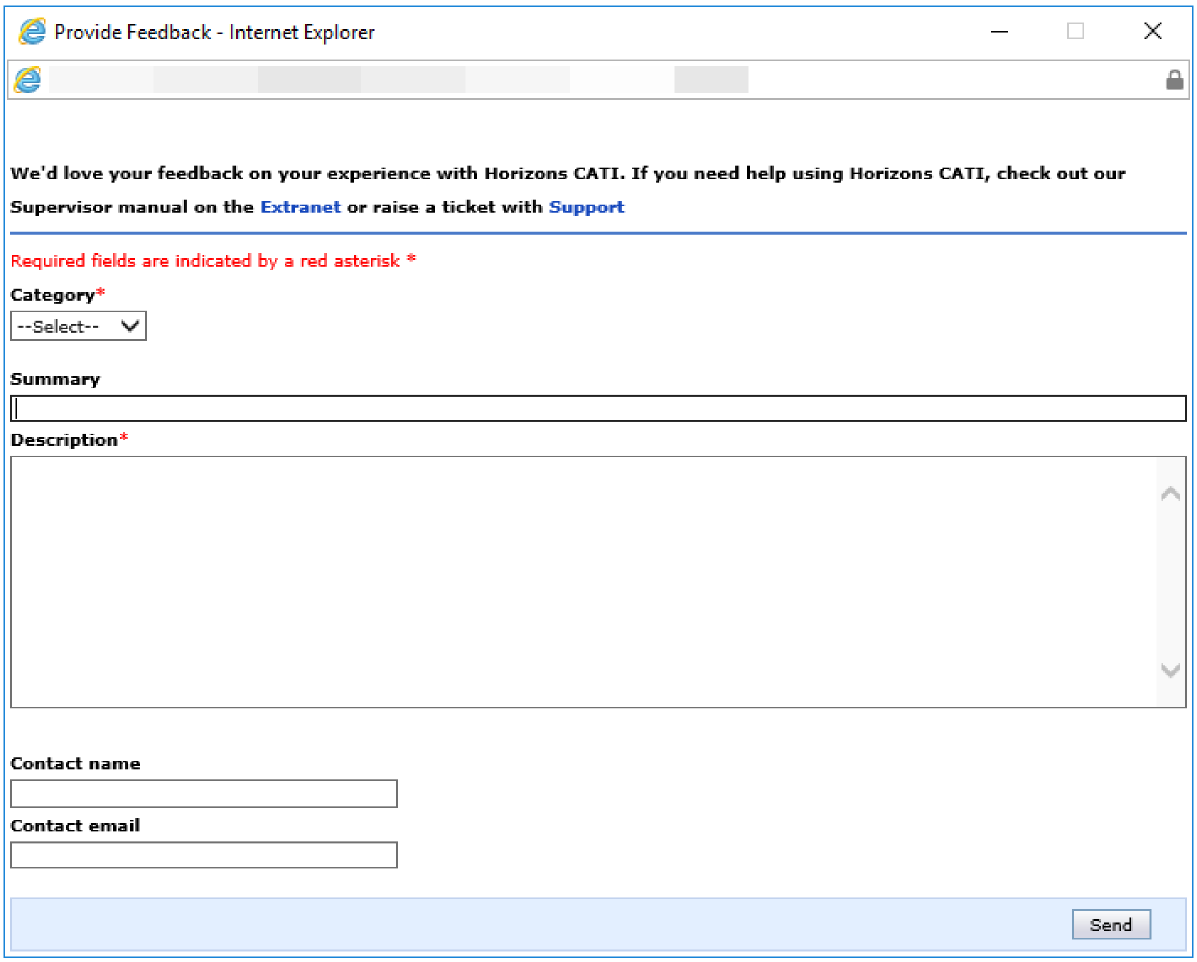


Figure 13 The Provide feedback dialog window

Follow the instructions provided in the dialog window.

Please note that an inquiry regarding a help request should be directed to a support team at any time - please use a corresponding link in the Provide feedback window to raise a support ticket, or take advantage of the CATI Supervisor User Guide which is always available for registered software users form the Confirmit Extranet. We also encourage using a built-in version of the User Guide which is accessible from the CATI Supervisor UI - pressing the Help button  available in most windows will take you to the start page of the manual.

2 Interviewer management

All the interviewers work under supervision. The supervisor specifies survey parameters, defines call lists for each survey, adds and deletes interviewers and assigns them to specified 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 for particular surveys, or they can be united using other logic.

To perform interviewer management you should first choose the Interviewers item in the Navigation menu. This will unfold the list of interviewer groups in the Navigation menu below the Interviewers item and simultaneously display the list of interviewers who do not currently belong to any group in the top right frame.

Both an interviewer and an interviewer group are configured with the help of the property set, which includes group membership, survey assignment specification and a name. The supervisor can specify a password for any interviewer, which this interviewer should use when he/she logs into the CATI console to perform interviewing (see Adding and deleting an interviewer on page 30 for details).

Interviewers and interviewer groups constitute a single object, which is called Interviewers.

Please read Managing interviewer groups below for instructions on managing interviewer groups, and Managing interviewers on page 28 – 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

Whatever operations with the interviewer group you need to perform you start with browsing the interviewer group list.

To view the interviewer group list:

1. Click on the Interviewers object name in the left Navigation menu. This will unfold the list of interviewer group items below.

   Interviewer group items are presented in the form of the hierarchy tree, where each node stands for an interviewer group. 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 unfold the 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.

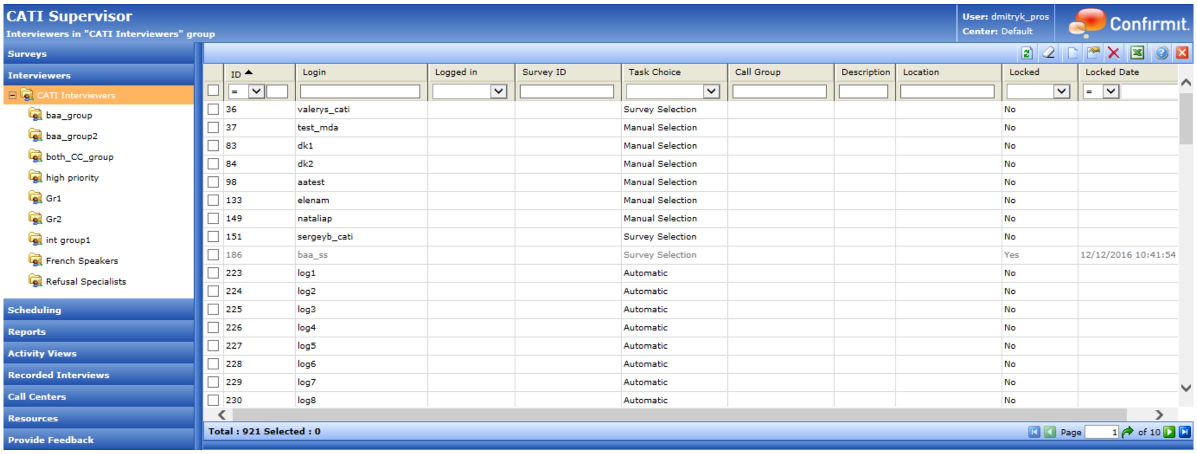


Figure 14 Viewing the interviewer group list in the top right frame

3. The 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 (the toolbar is located in the frame's title bar).
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)
	CLOSE WINDOW	Closes the CATI Supervisor window

2.1.2 Adding and deleting an interviewer group

To add a new interviewer group:

1. To create a new interviewer group either:
   - Right-click any row in the list (in the top right frame), and choose Add Group from the context menu, or;
   - Press the Add Group button  in the toolbar in the top right frame.

Any of the above listed actions brings up the Add Group dialog window, which is used to specify parameters of the interviewer group being created.

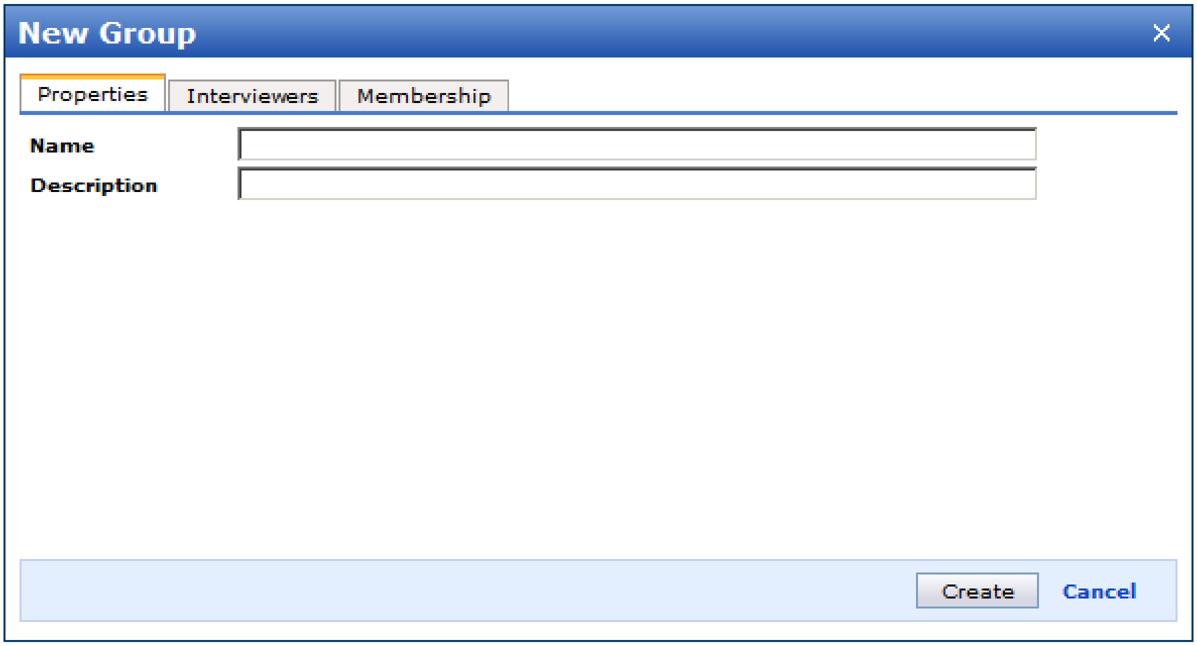


Figure 15 New Group dialog window - Properties tab

This dialog window uses the tabbed interface.

2. The Properties tab lets you enter the group name (in the Name field), and the group description (in the Description field). The Name is then displayed in the grid showing the group list.
3. The Interviewers tab contains a list of interviewers belonging to that group.

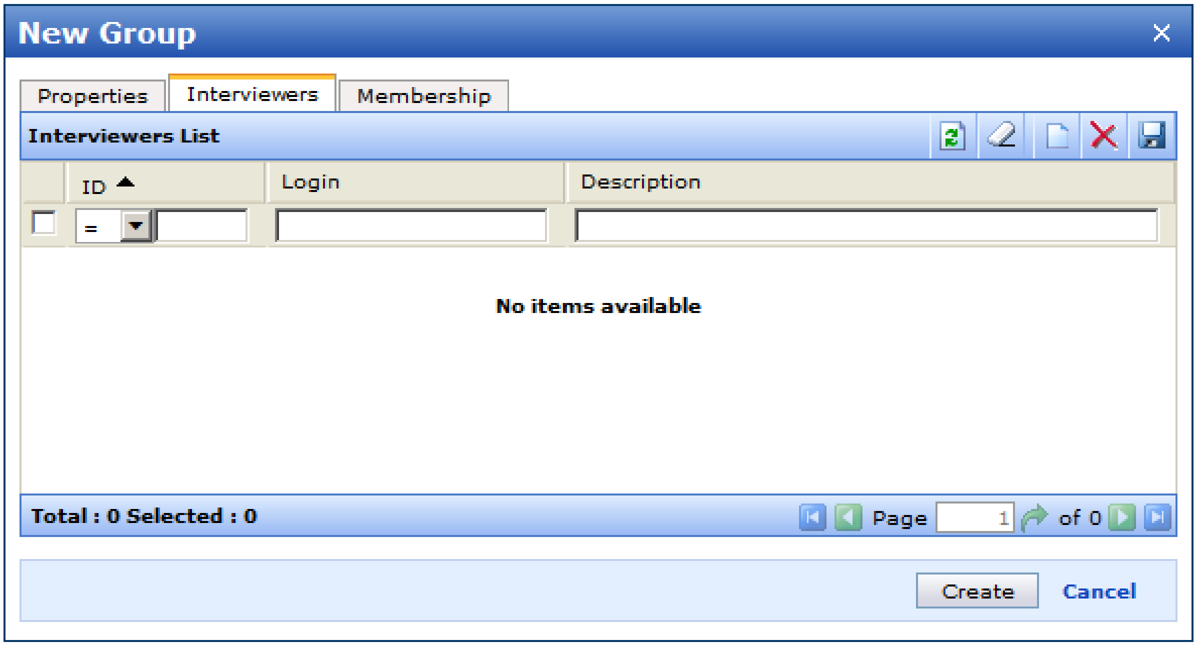


Figure 16 New Group dialog window - Interviewers tab

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

4. To add an interviewer press 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 dialog window.

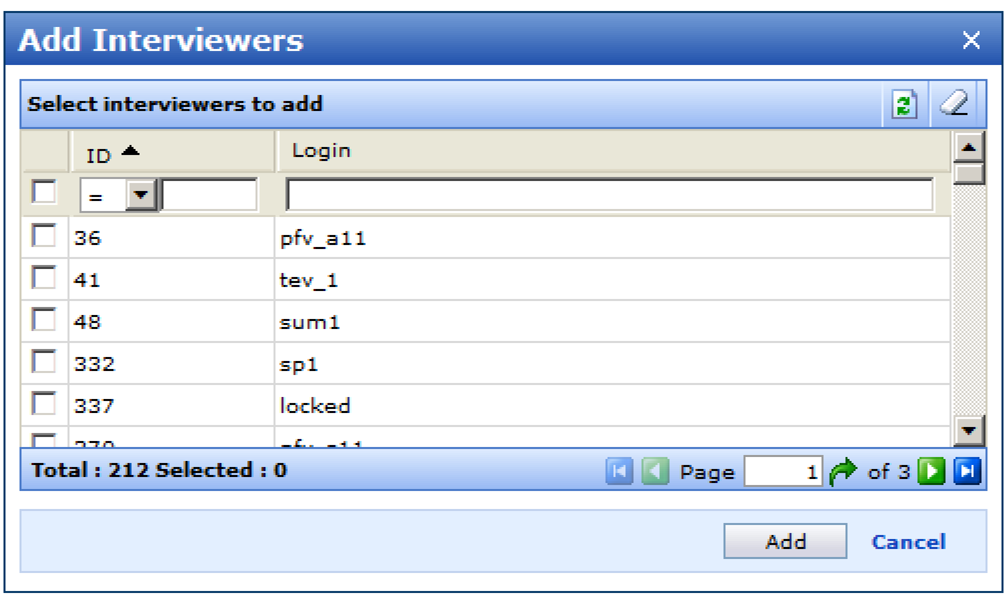


Figure 17 Selecting interviewers to add to the Interviewers tab

The list displays only interviewers that were already added to the system. You cannot add 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 on page 30 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 .

Press 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 press the Delete button on the toolbar. Alternatively you can right-click any selected row and choose Remove Interviewer from the shortcut menu.

5. The Membership tab of the New Group dialog window allows the group to be added into existing interviewer groups.

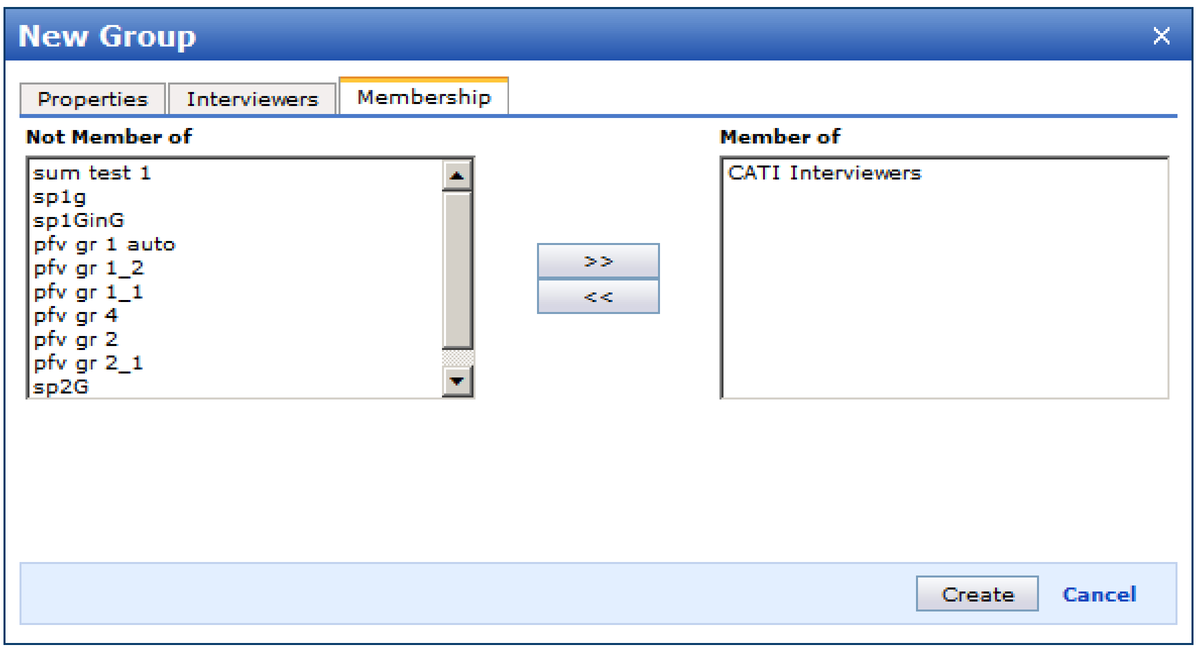


Figure 18 New Group dialog window - Membership tab

Select the group in the left pane (Not Member of) and press the Add arrow button located between panes to make the current group the member of the selected group. The selected group name appears in the right pane (Member of).

Repeat the procedure to add the current group to other required groups.

6. Finally press OK to create a group with the specified properties. The New Group dialog 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. First 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;
   - Press 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. Press Yes to proceed with deletion.
4. Please 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 please see Multiple Group Assignments on page 142.

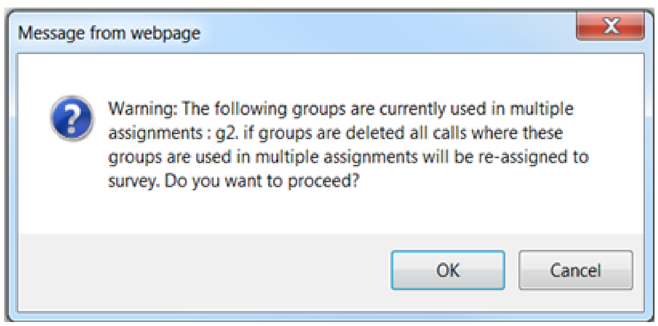


Figure 19 Message displayed when a group used in a multiple assignment is deleted

When a group that was used to specify the multiple assignment is deleted, 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;
   - Press 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.

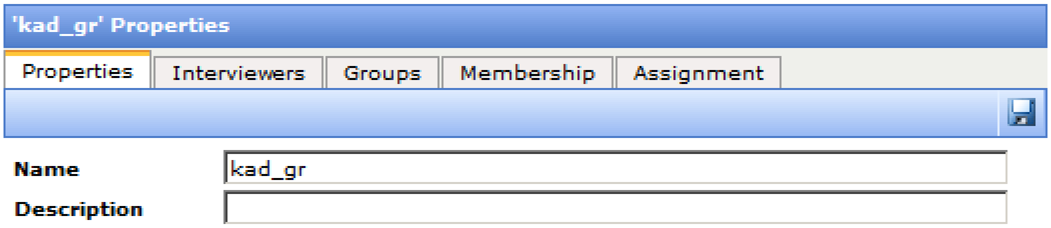


Figure 20 Interviewer group properties, Properties tab - the right bottom frame

3. All tabs except for the Assignment tab have controls that are similar to those used with the New Group dialog window (see Adding and deleting an interviewer group on page 16 for description). The same work technique is applied with these tabs.

   Pictures below show these tabs.

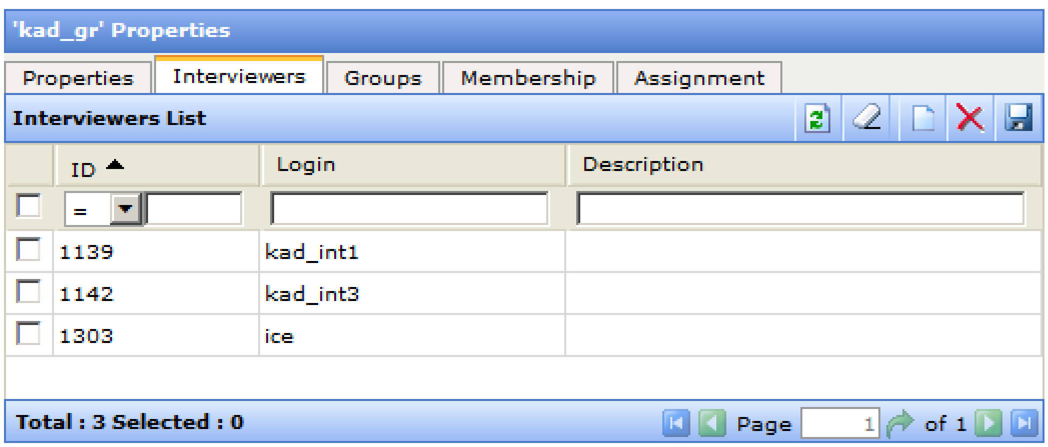


Figure 21 Interviewer group properties, Interviewers tab - the right bottom frame

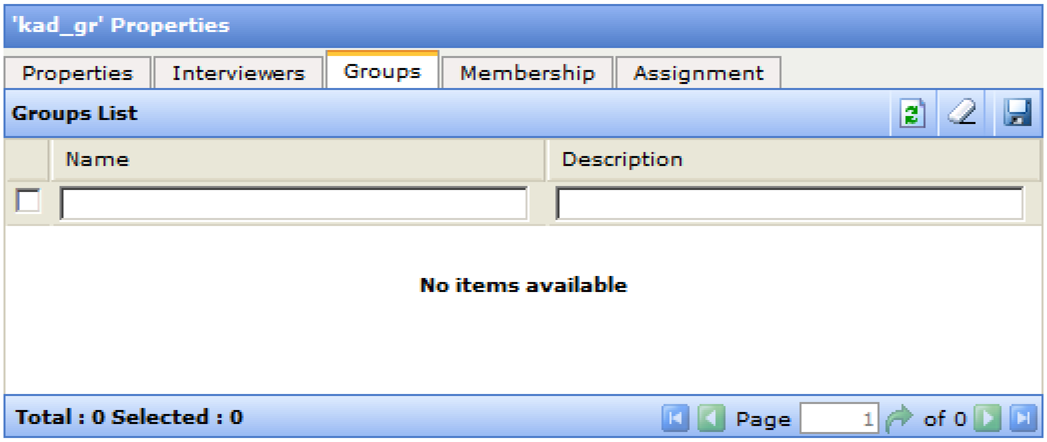


Figure 22 Interviewer group properties, Groups tab - the right bottom frame

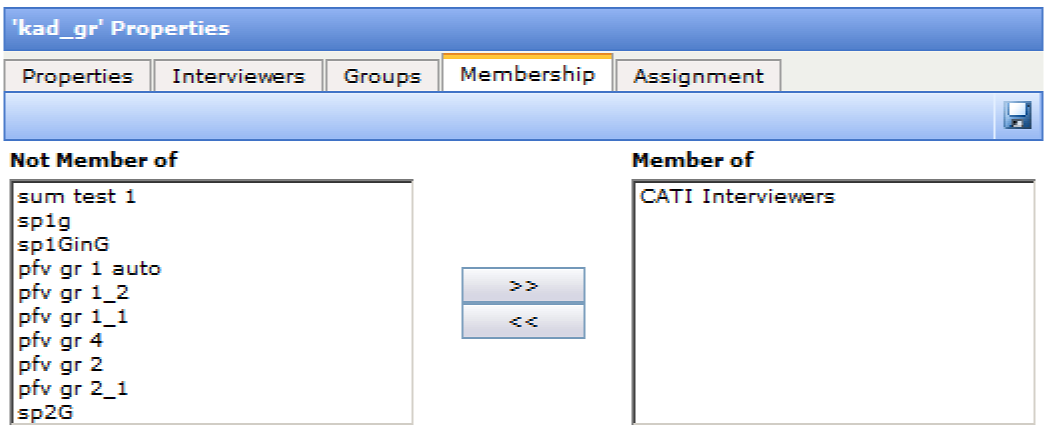


Figure 23 Interviewer group properties, Membership tab - the right bottom frame

Please pay attention that tabs in the Interviewer Group Properties view contain the Save button on the toolbar. If you have introduced 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 viewing, adding, replacing and deleting survey assignments (de-assigning surveys) 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 Viewing and modifying the interviewer properties on page 37 for instructions). To view assignments made for a nested interviewer group you should view this group's properties.

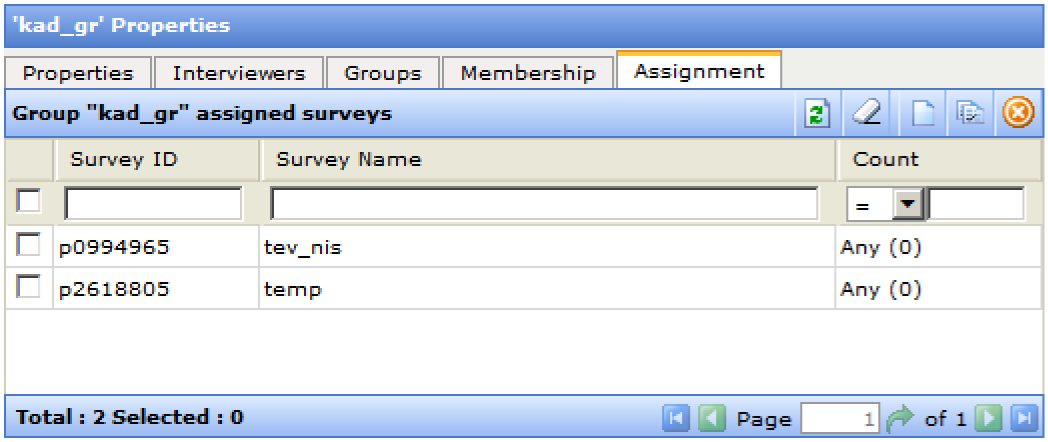


Figure 24 Interviewer group properties, Assignment tab - the right bottom frame

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.

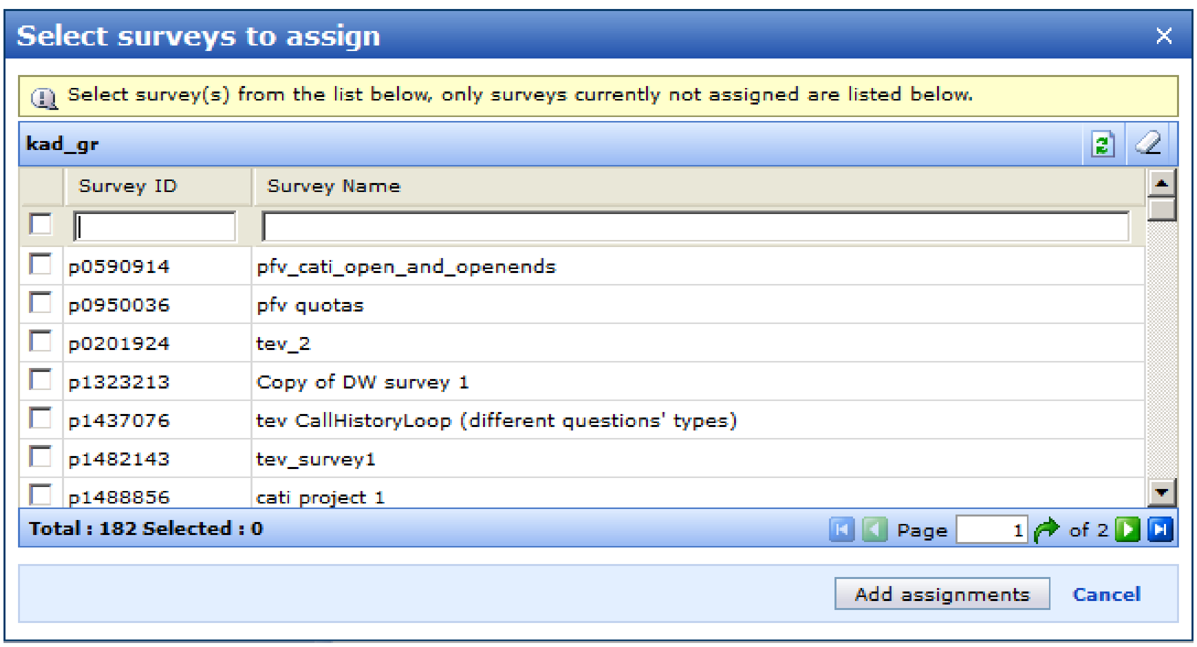


Figure 25 Selecting a survey to assign using the Select surveys to assign dialog window

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 .

Press 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.

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

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

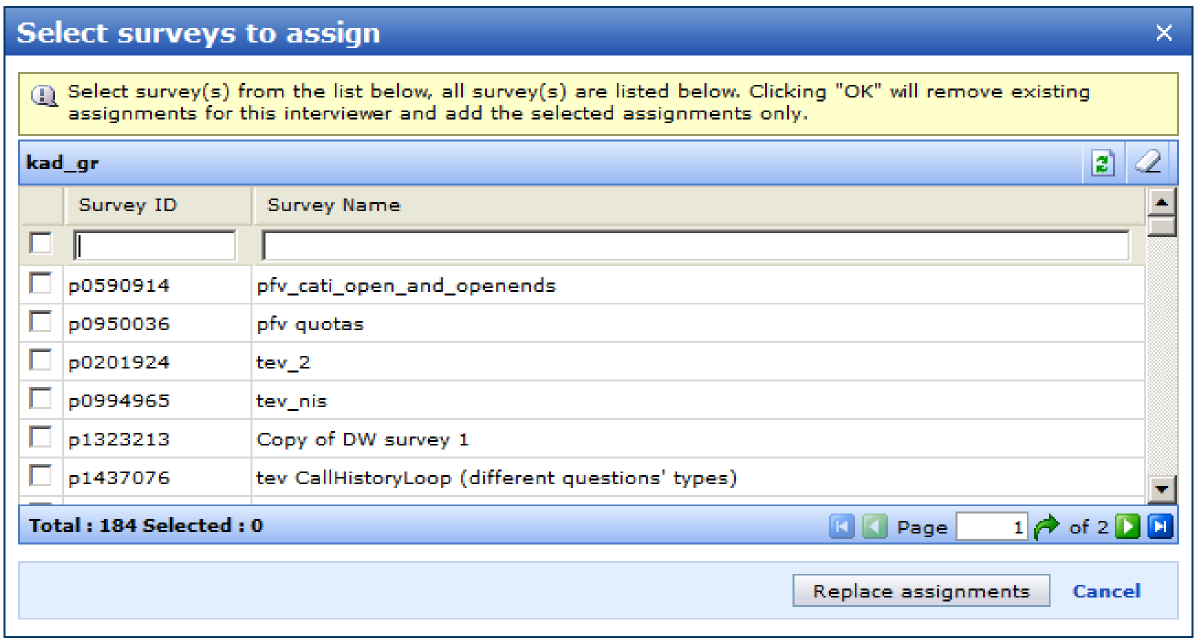


Figure 26 Selecting surveys to replace the existing assignment for an interviewer group

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 .

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

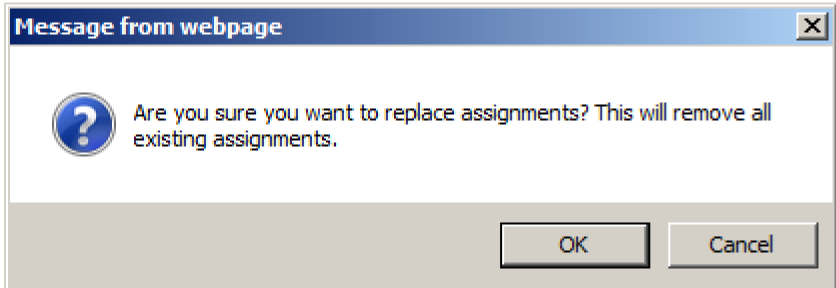


Figure 27 Warning message displayed on the attempt to execute the assignment replacement

Press 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 press 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. Press 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 instantly 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 Viewing the interviewer group list on page 15 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.

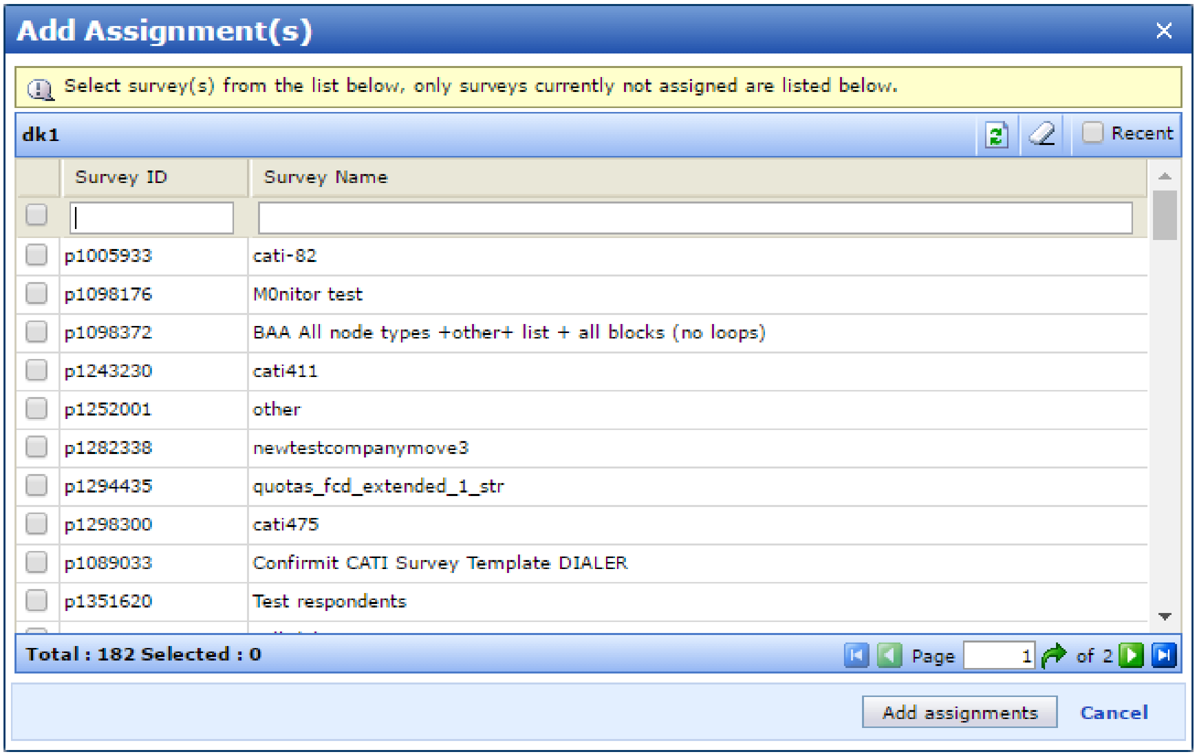


Figure 28 Selecting a survey to assign in the Add Assignment window

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. Press 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 Viewing the interviewer group list on page 15 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.

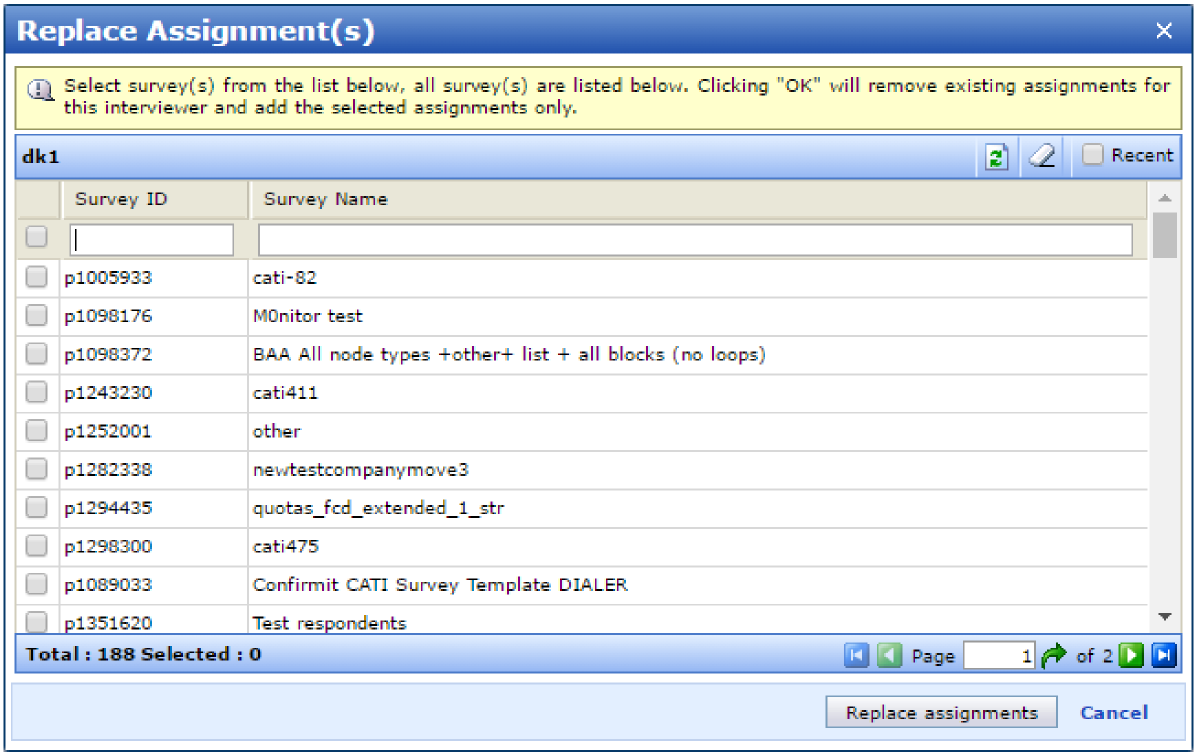


Figure 29 Selecting a survey to replace assignment in the Replace Assignment window

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. Press 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 one and the same task choice mode for all interviewers belonging to the selected group (s).

Mind that in this case you are not changing the interviewer group properties, but instead you are changing properties of all 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 a number of interviewer groups.
2. Right-click on the selected group(s), and choose Change Task Choice from the context menu that appears.

   This will display the Change Task Choice dialog window. This window, and the rest of the procedure is similar to that which is used to configure the task choice mode for a single interviewer. Please refer to Changing the task choice mode for an interviewer on page 53 for the procedure description.

2.2 Managing interviewers

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

- View the interviewer list;
- Add and delete interviewers;
- View and modify interviewer properties.

2.2.1 Viewing the interviewer list

Whatever operations with the interviewer group you need to perform you start with browsing the interviewer group list.

To view the interviewer group list:

1. Click on the Interviewers object name in the left Navigation menu. This will unfold 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 unfold 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.

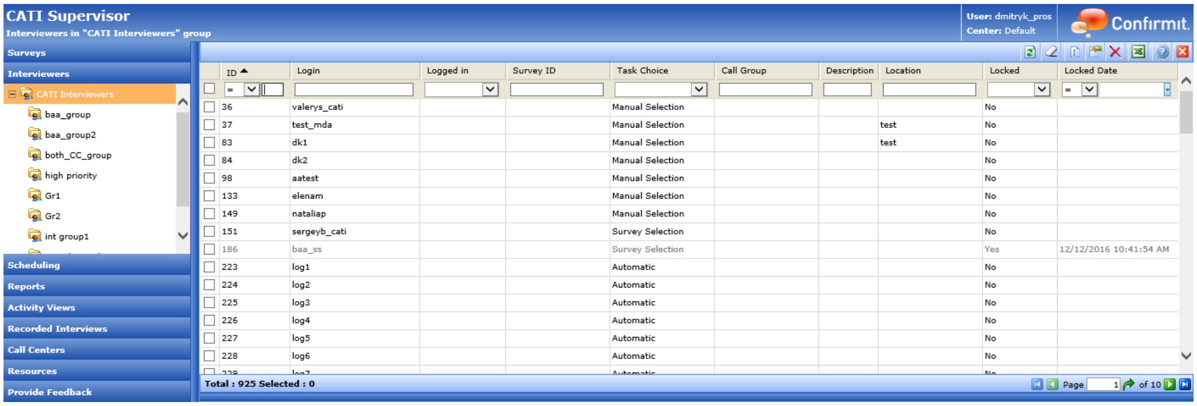


Figure 30 Viewing the interviewer list in the top right frame

3. The user can perform the following operations with interviewer groups:
   - View and modify the interviewer properties;
   - Add or delete interviewers;
   - Import the list of interviewers from a file.

   These operations can be performed while the interviewer list is 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 description), or by selecting a row in the grid and pressing buttons on the toolbar in the top right frame (the toolbar is located in the frame's title bar).

4. 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 list
	CLEAR SELECTION	Deselects all currently selected interviewers at once
	NEW INTERVIEWER	Displays the Add Interviewer dialog window and allows a new interviewer to be created
	PROPERTIES	Displays the interviewer properties in the bottom right frame. You can edit these properties.
	DELETE	Deletes the selected interviewer group(s)
	IMPORT	Allows the list of interviewers to be imported from a file
	CLOSE WINDOW	Closes the CATI Supervisor dialog window

2.2.2 Adding and deleting an interviewer

To add a new interviewer:

1. To add a new interviewer to a group you should first navigate to that group and view the list of interviewers belonging to that group (see Viewing the interviewer list on page 28 for instructions on viewing the interviewer list).
2. To create a new interviewer group either:
   - Right-click any row in the interviewer list (in the top right frame), and choose New from the context menu, or;
   - Press the New Interviewer button  on the toolbar in the top right frame.
3. Any of the above listed actions brings up the New Interviewer dialog window, which can be used to specify properties of the interviewer being created.

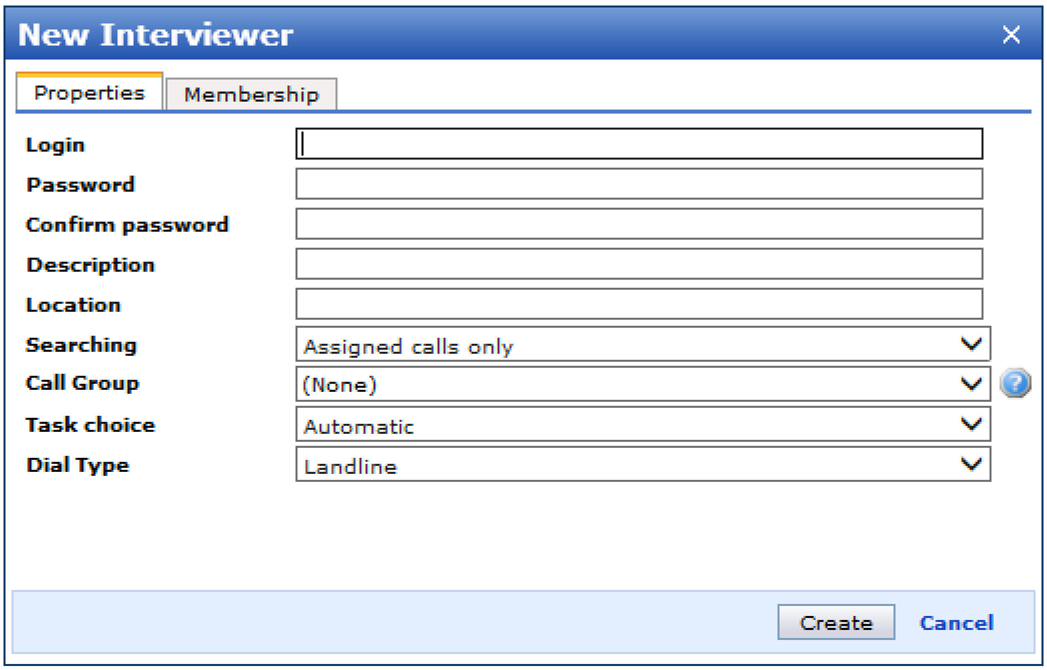


Figure 31 New Interviewer dialog window - Properties tab

4. Enter user credentials in the Login and Password fields. Enter the password once again in the Confirm password field. Enter the interviewer description in the optional Description field.
5. CATI Interviewers can be assigned a free text Location attribute. This attribute will be passed to a connected dialer. 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. The Location attribute is optional.

   Please see Changing a location for an interviewer on page 57 also for alternative ways of changing the Location attribute value.
6. An interviewer can be allowed to bypass explicit call assignment. In other words, if the interviewer is assigned to particular calls, and not to a whole survey, he 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 the next step for instruction on how to specify the task choice mode for an interviewer).

In case the interviewer works in a task choice mode other than Manual, the "bypass permission" would have 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 - he will see only calls that were explicitly assigned to him. Calls that were not assigned explicitly to that interviewer would remain invisible to him.

The "All calls" option makes all calls assigned to all interviewers available to that 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 please refer to Configuring the Call Groups on page 333. 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 Changing a call group for an interviewer on page 57for 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.

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 Dialing in the Single survey TCPA mode on page 344 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.

    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 he will work in. The choice is performed using the dialog window which appears right after he logs in. This dialog window contains a drop-down box with a list of task choice modes assigned to him by the Supervisor.

    In case the Supervisor selects 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 he logs into the CATI Interviewer Console.

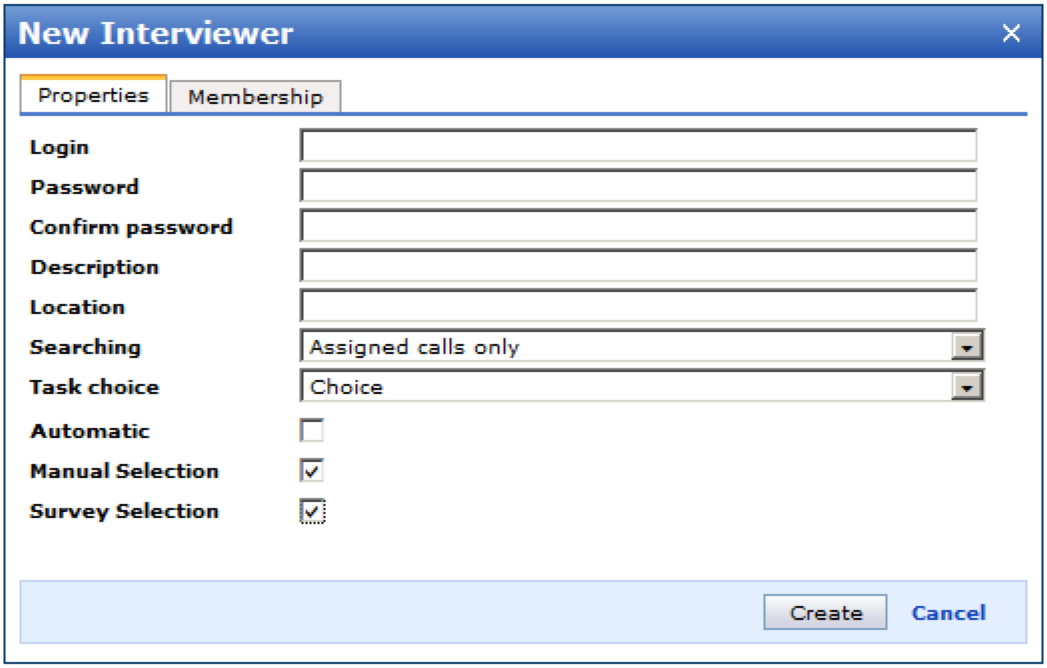


Figure 32 Selecting the "Choice" mode

11. The Membership tab provides you with the ability to choose a group to include the interviewer into.

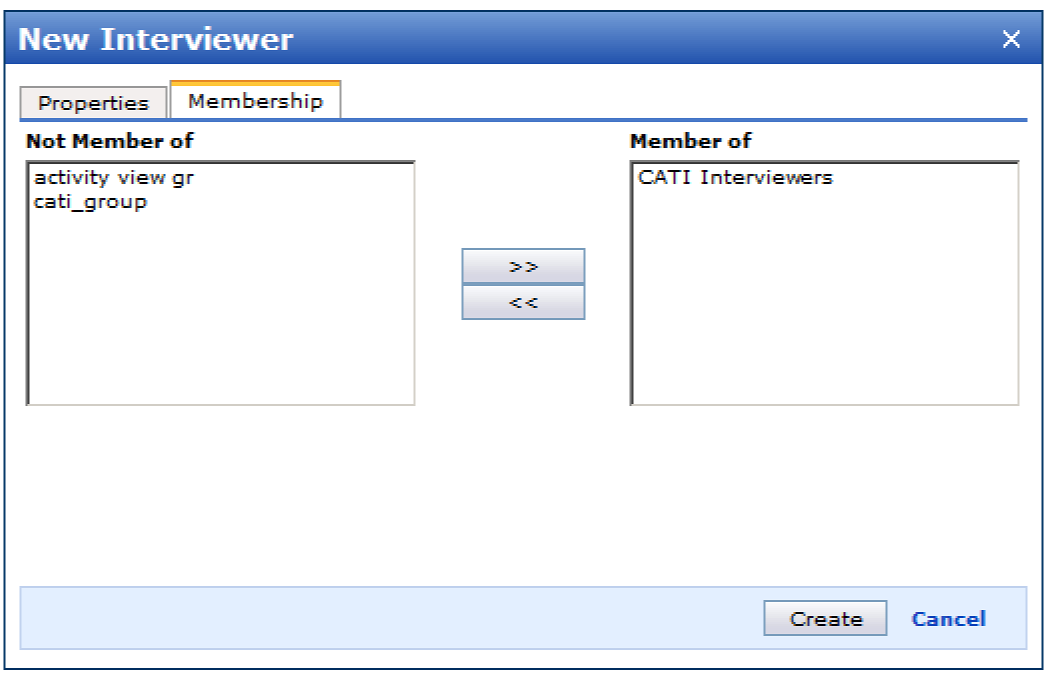


Figure 33 New Interviewer dialog window - Membership tab

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

You can 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 press 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 press 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. First select a single or a number of interviewers by checking a box in front of the required interviewers in the list in the top right frame (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(s) either:
   - Right-click any selected row in the list (in the top right frame), and choose Delete from the context menu, or;
   - Press 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. Press OK to proceed with deletion.

2.2.3 Locking and unlocking the interviewer's account

The supervisor can instantly 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.

Please 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. Please refer to Configuring settings related to the entire company on page 364 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 instantly aborted and assigned the "Interrupted by system" extended status.

To instantly lock an interviewer's account:

1. Display the Interviewer list in the top right frame (see Viewing the interviewer list on page 28 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.

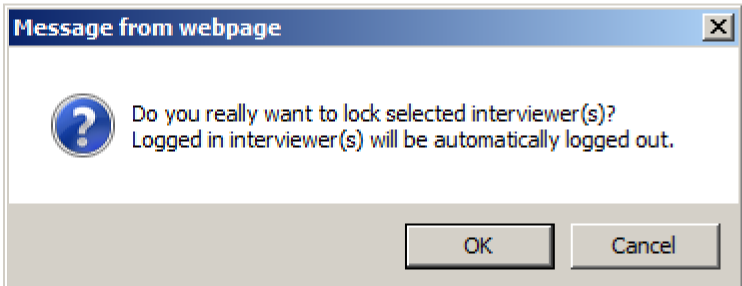


Figure 34 Confirming instant interviewer account locking

3. Press 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).

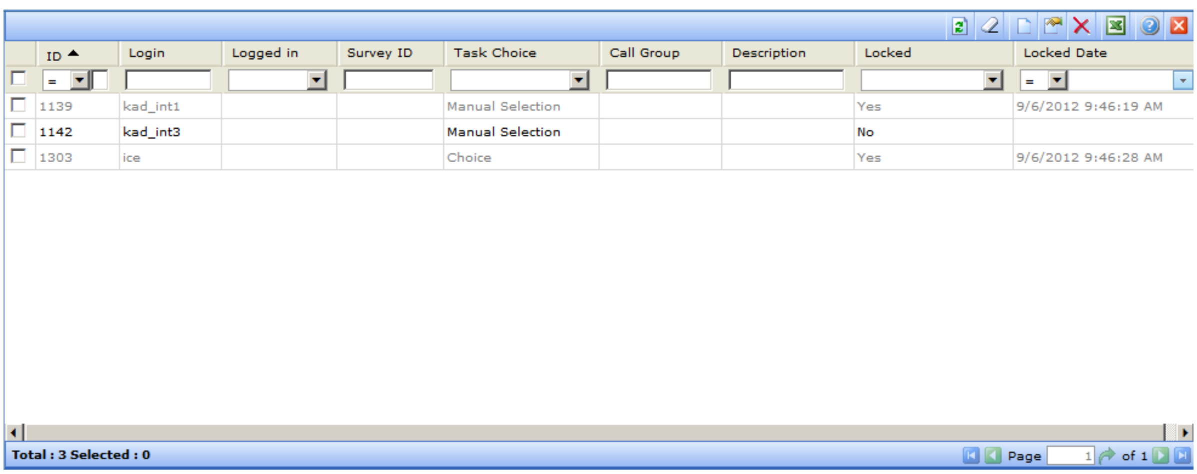


Figure 35 Interviewer list showing the locked interviewer accounts

To unlock an interviewer's account:

1. Display the Interviewer list in the top right frame (see Viewing the interviewer list on page 28 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.

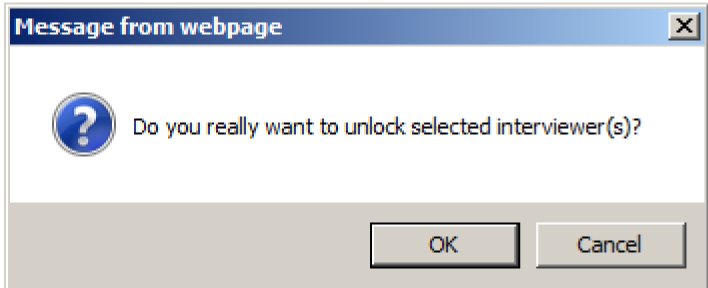


Figure 36 Confirming interviewer account unlocking

3. Press 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.

2.2.4 Seamless switching of an automatic survey

The Supervisor has an opportunity to seamlessly change an automatic survey that was once defined for an interviewer. This means that an interviewer for whom this seamless change is performed will be quickly switched to work with another designated survey so that he/she will not have to perform any extra action to complete this switching. The interviewer will only have to finish the current interview and the system will then take him to another one which belongs to another survey.

There are three conditions that should be satisfied before a seamless survey switch can be performed for an interviewer:

- the interviewer's company must work with the dialer system enabled
- the interviewer must be logged into the Interviewer's Console and must be working on some interview at the moment the new Automatic Survey is assigned to him;
- the interviewer must work in the Survey Selection mode with some Automatic Survey (see) assigned to him

When these conditions are satisfied, the Supervisor can use the procedure described below to specify a survey to which the interviewer will be switched. The interviewer will only be switched to the specified survey when he/she finishes the current interview. In case a new automatic survey was defined for an interviewer but he left for a break, or logged out after finishing the current interview, he will be delivered an interview from a new Automatic survey when he returns from a break or logs in again.

To seamlessly change an automatic survey

1. First check if the dialer is enabled for the interviewer's company.
2. Make sure that 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, also check that they are logged into the Interviewer's Console and are working on some interview at the moment.
3. Go to the Interviewers tab in the left Navigation frame and view the list of interviewers. Find the interviewer you need and right-click this interviewer in the list. Choose Change Automatic Survey from the context menu that appears.

   This will display the Change Automatic Survey dialog window.

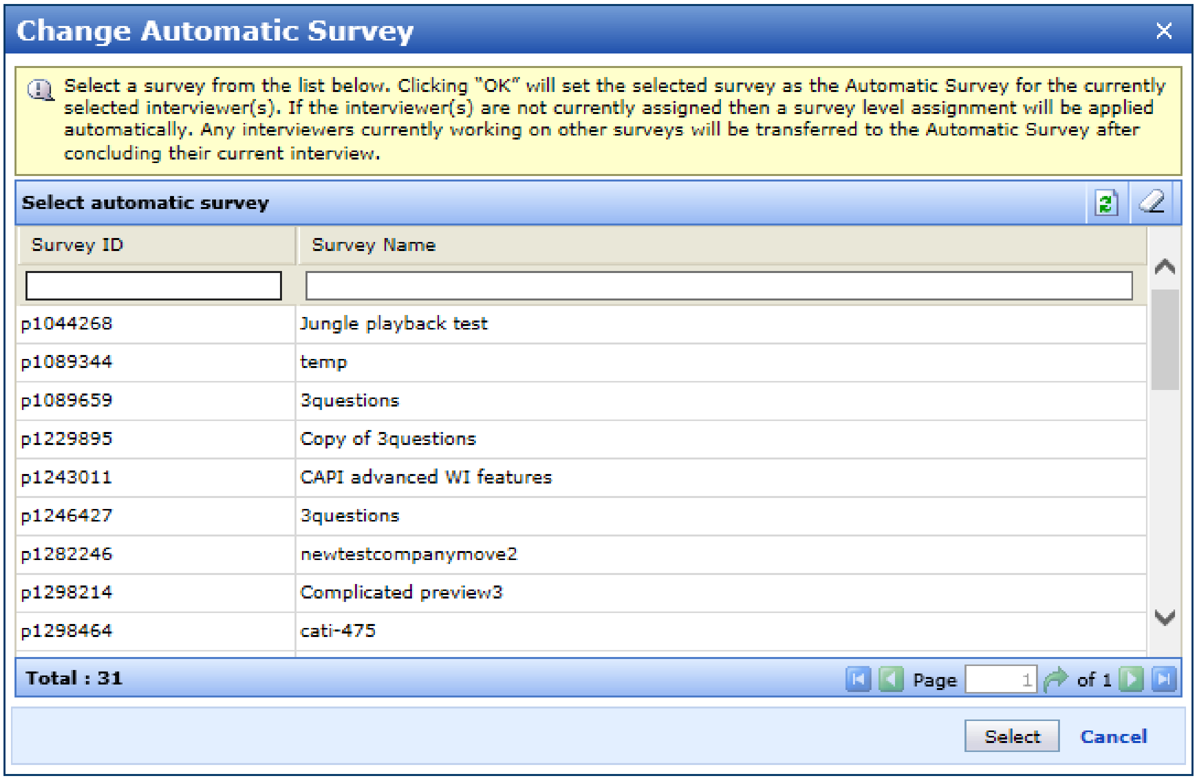


Figure 37 Seamless change of an automatic survey

4. Choose a survey in the list and click on it. Next press the Select button. This will close the Change Automatic Survey dialog window.
5. Note that 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 instantly.

   The Interviewer Messaging facility informs the interviewer of the automatic survey change by displaying a notification popping out of the system tray.

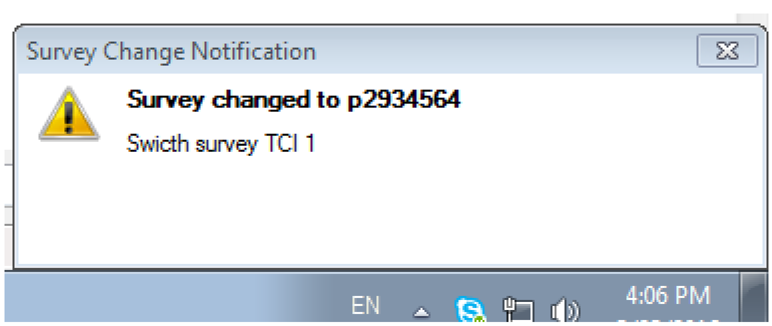


Figure 38 Information message displayed upon the seamless change of an Automatic Survey

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

2.2.5 Viewing and modifying the interviewer properties

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

To modify the interviewer properties:

1. To modify the interviewer properties either:
   - Right-click the required row in the interviewer list (in the top right frame), and choose Properties from the context menu, or;
   - Press the Properties button  in the toolbar in the top right frame.
2. Any of the above listed actions displays the interviewer properties in the bottom right frame. This frame uses tabs to display the interviewer properties. Use these tabs to modify parameters of the existing interviewer.
3. Tabs displayed in the interviewer Properties mode are quite similar to those used with the New Interviewer dialog window (see Adding and deleting an interviewer on page 30 for description). The same work technique is applied with these tabs.

   Pictures below show these tabs.

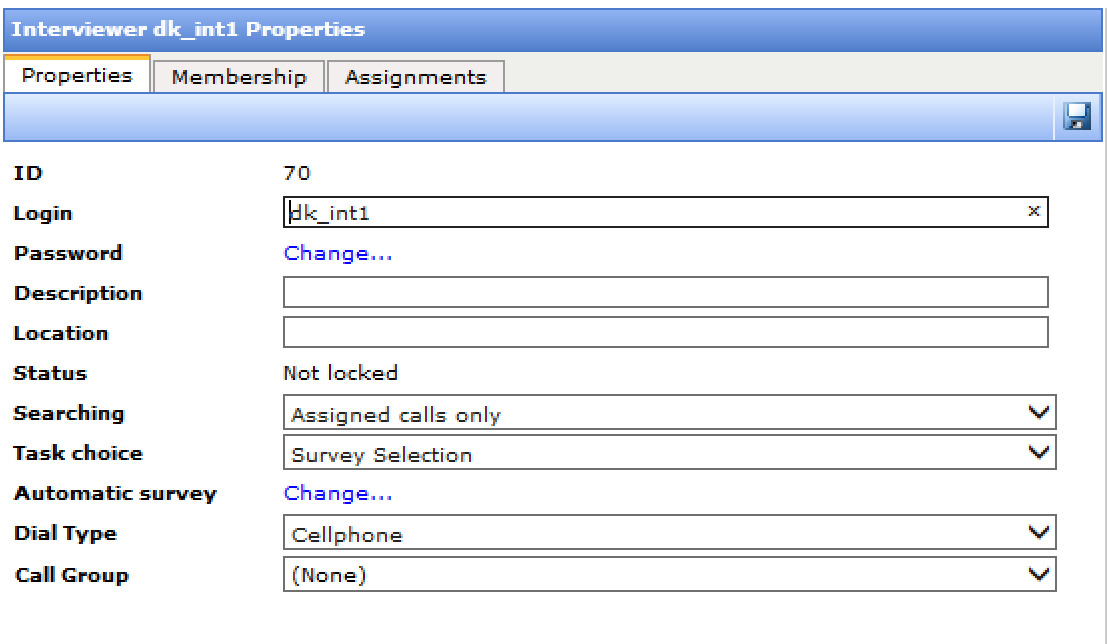


Figure 39 Interviewer properties, the Properties tab - the bottom right frame

The **ID** field shows the interviewer's identidfier.

The login name for any interviewer can be changed at any time - click in the **Login** field and edit the name as required.

Current interviewer's password is not displayed at any circumstances. You can press the Change button to change the current interviewer's password. This will display a small form below the button. It will contain two fields – New Password, and Confirm Password. Enter the new password in both fields and press OK to change the interviewer's password.

The **Description** field allows for adding a short description of the interviewer in the free form.

The **Status** field shows whether this interviewer's account is currently locked or not. The field below - **Locked date** - is displayed only when the interviewer is currently locked, and it shows the date on which the interviewer has been locked. Please refer to Locking and unlocking the interviewer's account on page 33 for details on the interviewer's account locking functionality.

The **Location** field is used to identify the location of the interviewer to the dialer. Interviewers can be assigned a free text Location attribute. This attribute will be passed to a connected dialer. The Location attribute is optional. Please see Changing a location for an interviewer on page 57 also for alternative ways of changing the Location attribute value.

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 applying custom call delivery rules by choosing from a number of pre-configured call sets - for full description of the option and configuration procedure please refer to Configuring the Call Groups on page 333. This option is enabled and disabled by the system administrator, this facility is not available through the regular CATI Supervisor module interface.

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 (see task choice mode descriptions below).

If you try selecting a call group from the Call Group list for an interviewer who is currently assigned for working in any task choice mode other than Survey Selection, CATI Supervisor displays the warning sign beside the Call Group drop-down list, like in the picture below. Hover the mouse pointer over the red Warning sign and the tooltip will appear describing the error cause.

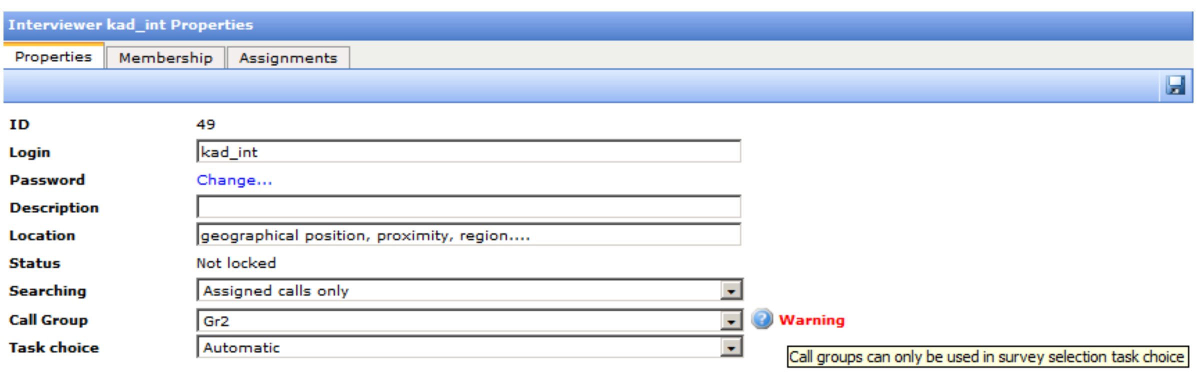


Figure 40 The Warning sign displayed when a call group is apllied to an interviewer not assigned for work in the Survey Selection task choice mode

The **Task Choice** field allows specifying how calls are delivered to the interviewer when he works with the CATI Interviewer Console (please refer to Selecting a Survey/Interview on page 248 for details on the Task Choice modes).

Automatic and Manual selection task choice modes do not assume any additional configuration, but if Survey selection, or Choice mode is selected, 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. Please refer to Selecting a Survey/Interview on page 248 for detailed description of the Survey Selection task choice mode. If any survey was already assigned to the interviewer to be served as the Automatic survey, its name will appear along with the Change button. If the interviewer was not assigned to an Automatic survey, only the Change button will be available.

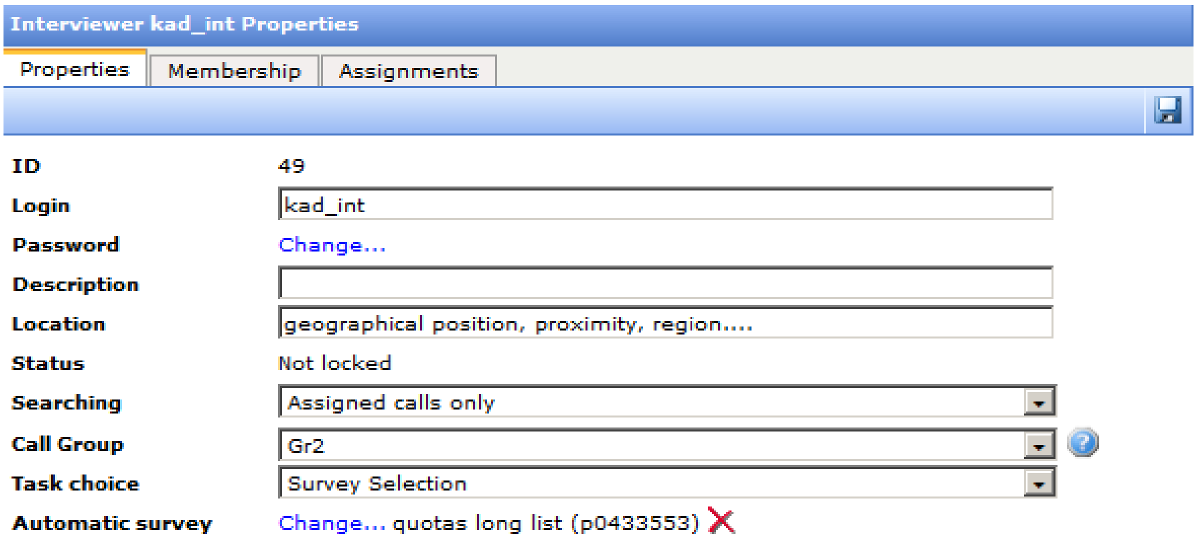


Figure 41 Interviewer properties, the Properties tab - the Survey Selection mode is chosen

If an automatic survey has already been specified (like in the picture above), you can clear this specification (specify work in the Survey Selection mode without an Automatic Survey). To do this simply press the Clear Automatic Survey button  to the right of this survey name in the Properties tab.

Pressing the Change button will display the Select Automatic Survey dialog window. This window allows selecting an Automatic survey. Select a survey and press OK in this window to confirm the selection. If any survey hset as an Automatic Survey before, it will be replaced by the currently selected one.

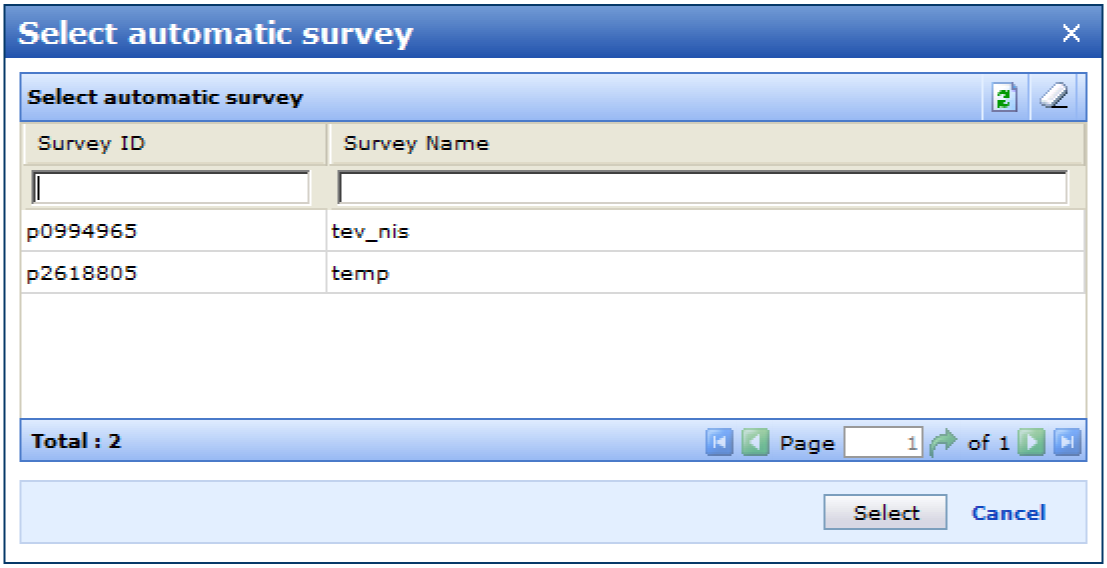


Figure 42 Selecting an Automatic survey in the Survey Selection task choice mode

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. Refer to Choice mode on page 254 for more details on working in the Choice mode.

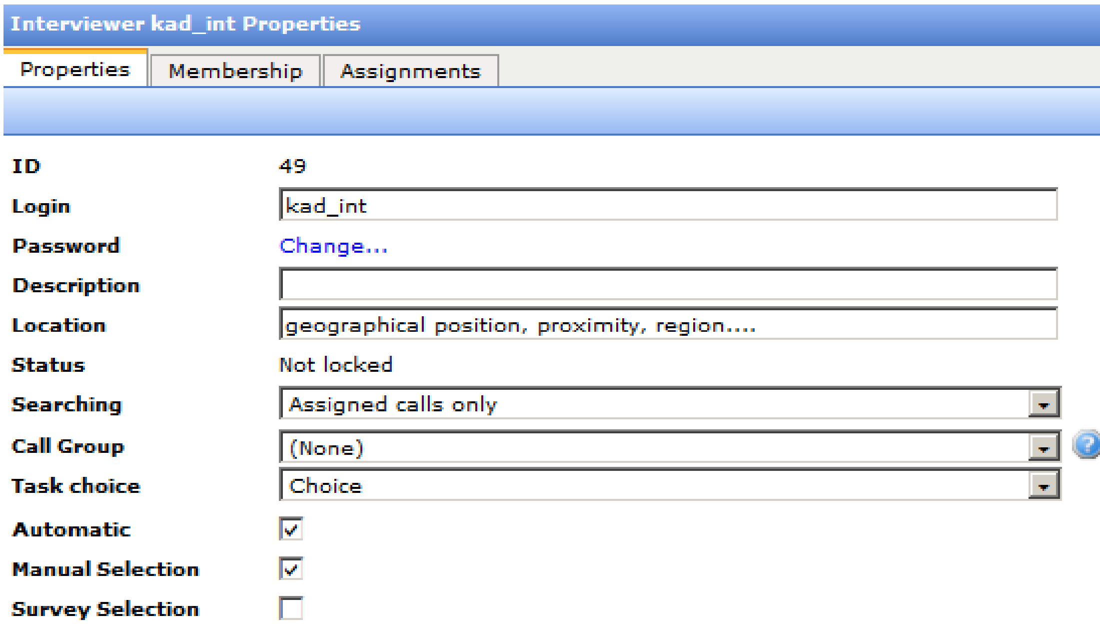


Figure 43 Interviewer properties, the Properties tab - the Choice mode is selected

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.

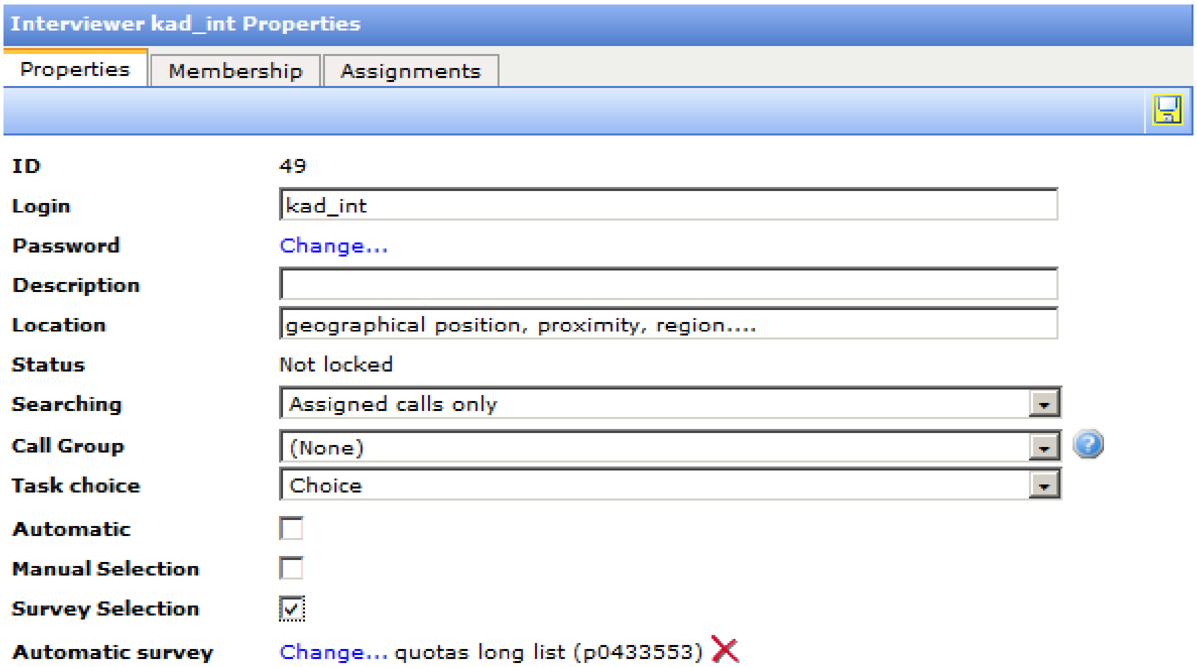


Figure 44 Interviewer properties, the Properties tab - the Automatic Survey option is selected for the interviewer working in the Choice mode

The Task Choice mode can also be changed from the Interviewer List (see Viewing the interviewer list on page 28 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. Please refer to Changing the task choice mode for an interviewer on page 53 for instructions.

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.

Refer to Dialing in the Single survey TCPA mode on page 344 for information regarding the TCPA compliance mode.

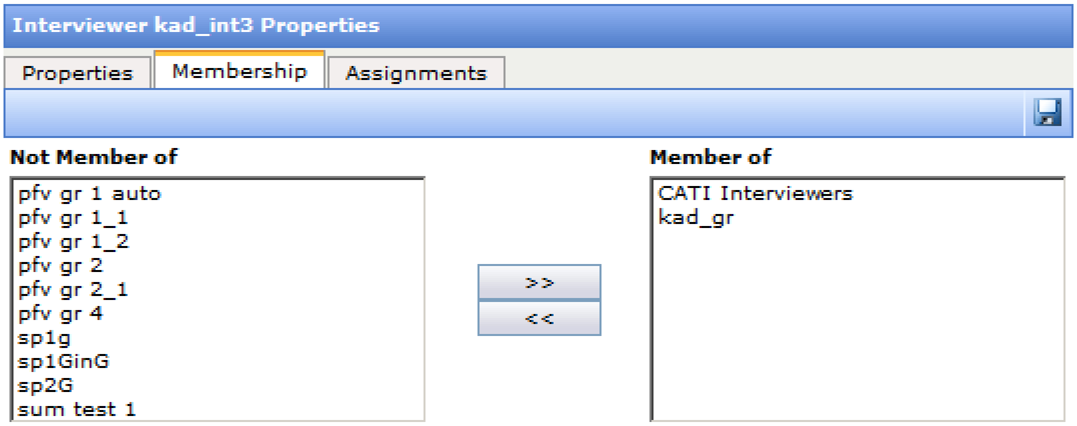


Figure 45 Interviewer properties, the Membership tab - the bottom right frame

Please pay attention that Properties and Membership tabs contain the Save button on the toolbar. If you have introduced 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 leave the tab - 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 Assignments tab allows viewing, adding, replacing and deleting survey assignments (de-assigning surveys) for the current interviewer.

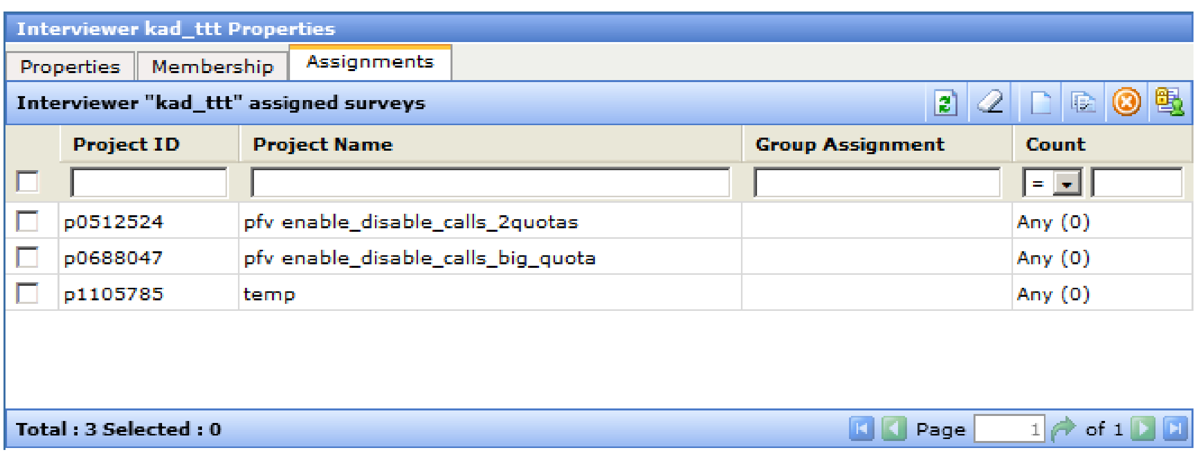


Figure 46 Interviewer properties, the Assignments tab - the bottom right frame

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.

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.

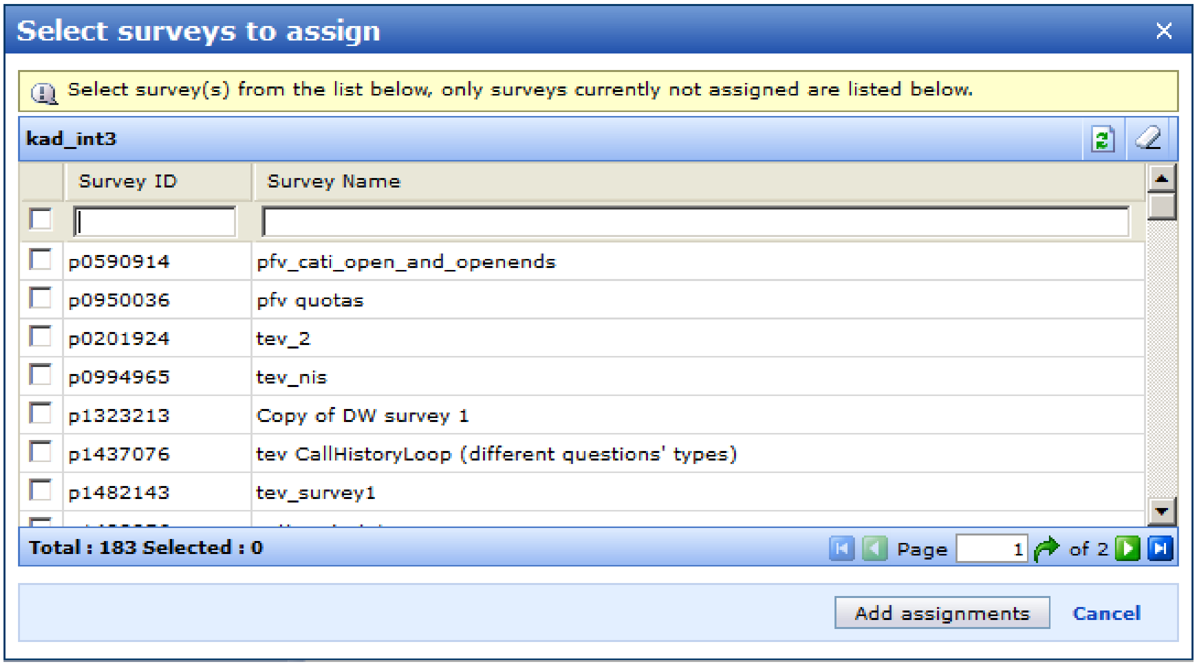


Figure 47 Selecting a survey to assign using the Select surveys to assign dialog window

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 .

Press 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 description of the assignment replacement procedure.

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

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

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

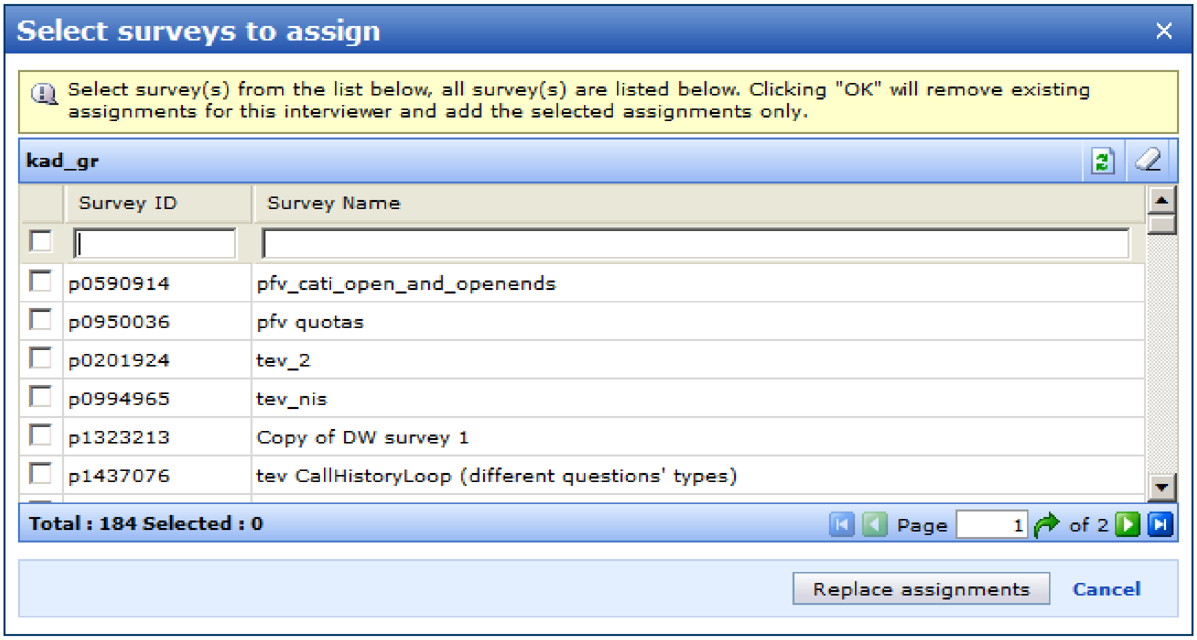


Figure 48 Selecting surveys to replace the existing assignment for an interviewer

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 .

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

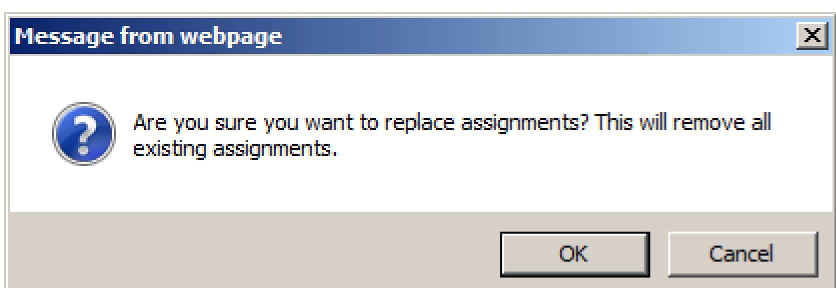


Figure 49 Warning message displayed on the attempt to execute the assignment replacement

Press 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. Though from the Assignments tab you can only assign the Automatic Survey for the interviewer - you cannot clear the Automatic Survey assignment (this can only be done from the Properties tab).

To set an Automatic Survey for the interviewer select a survey from those listed on the Assignments tab and press 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.

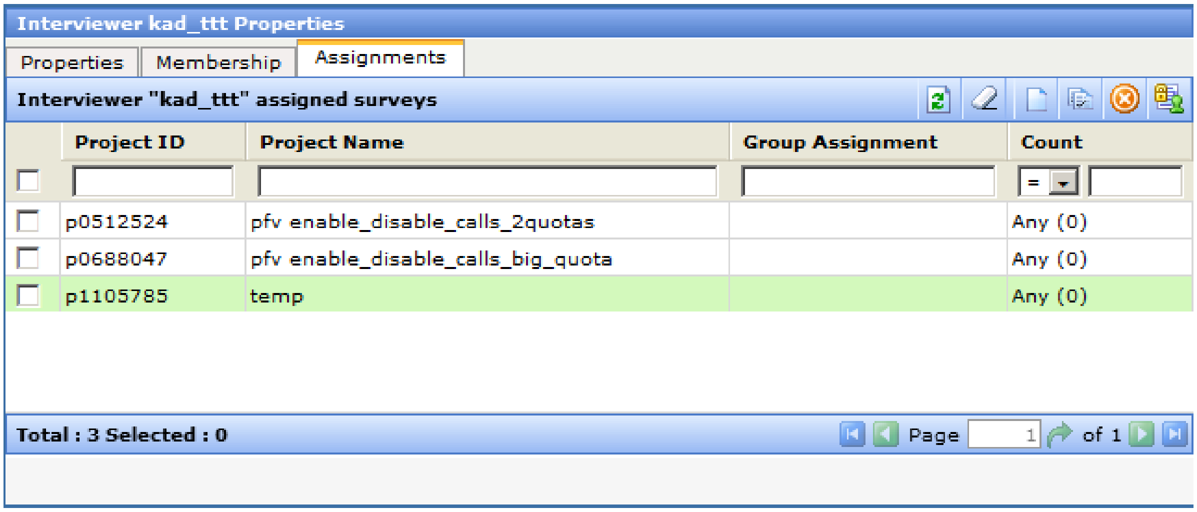


Figure 50 The Automatic Survey selected for the interviewer from the Assignments tab

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.

6. 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 press 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. Press OK to proceed with the De-assign action. The bottom right frame will be refreshed and the chosen surveys will disappear from the list.

2.2.6 Adding and replacing survey assignments directly from the interviewer list

You can instantly add and replace the existing assignments for any interviewer 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 required list of interviewers in the top right frame (see Viewing the interviewer list on page 28 for instructions).
2. Right-click the required interviewer 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.

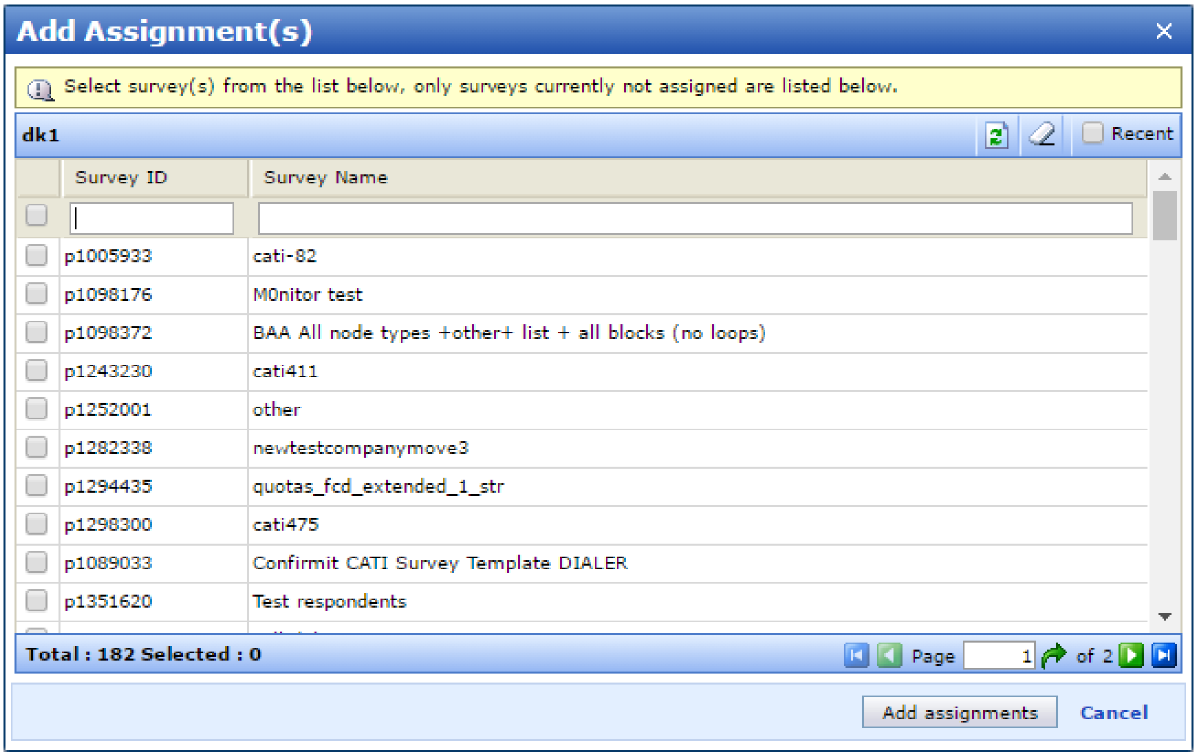


Figure 51 Selecting a survey to assign in the Add Assignment window

Only surveys that are currently not assigned to the selected interviewer 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. Please refer to Recent Surveys on page 114 for details regarding this option.
4. Press 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 right frame (see Viewing the interviewer list on page 28 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 window.

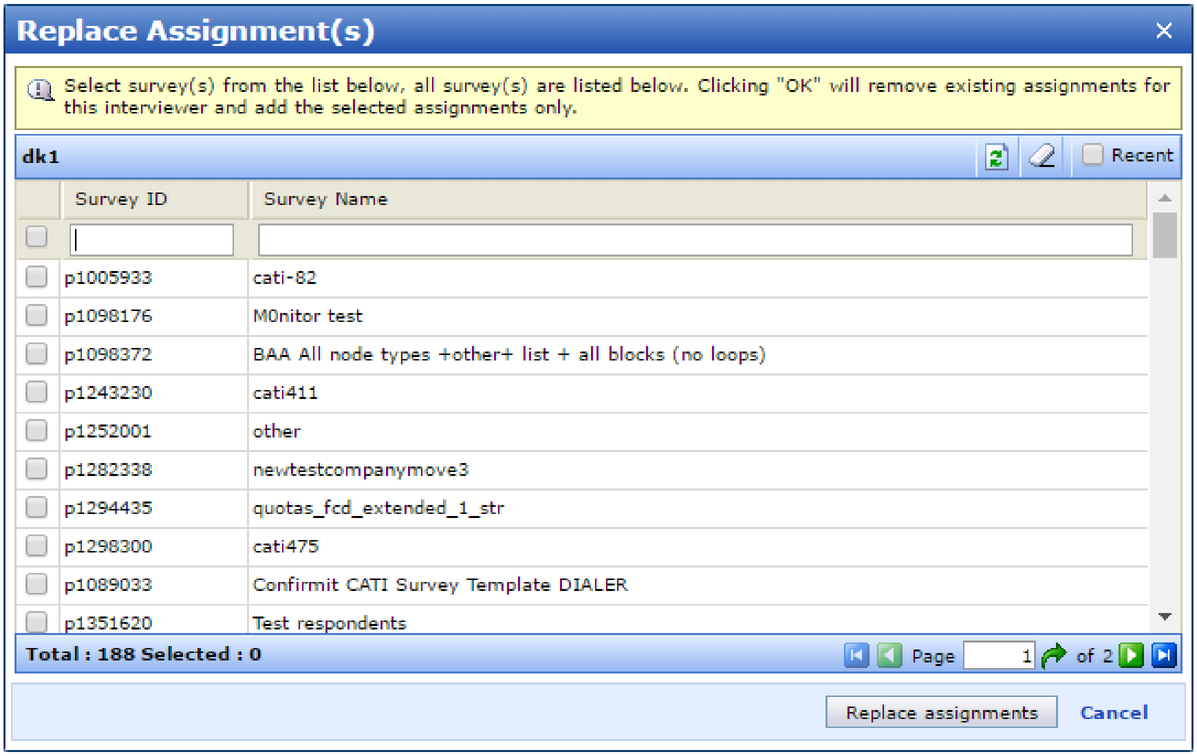


Figure 52 Selecting a survey to replace assignment in the Replace Assignment window

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

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

3. Please refer to Recent Surveys on page 114 for details regarding the Recent Surveys option.
4. Press 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.

2.2.7 Importing an interviewer list

The interviewer list can be imported from a file. This greatly speeds up the work.

The interviewer list must contain the required property set for each interviewer. 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 columns ("roles", or properties). Value format in the columns should be as follows:

- Group - comma separated list of groups the interviewer should be a member of,
- Login - login username for the interviewer (mandatory column),
- Password - password for the interviewer,
- Person description - description of the interviewer,
- 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 (please 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 53 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 on page 28 for instructions).
2. Press the Import button on the toolbar. This will display the Import dialog window.

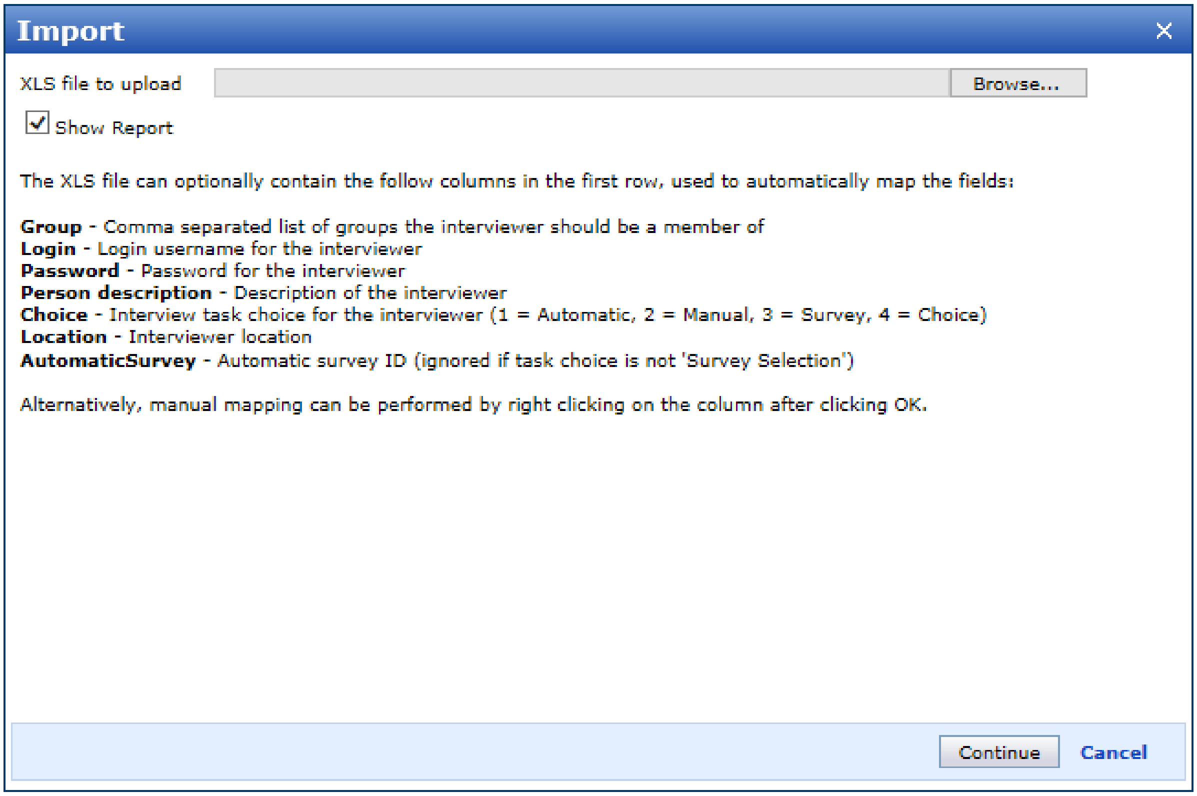


Figure 54 Importing the interviewer list from a file

3. The Import dialog window displays useful hints - the list of columns which can be used to describe each interviewer in the imported list, and the format of the values specified in these columns.

   The following column names are supported by CATI system:

- Group
- Login
- Password
- Person description
- Choice
- Location
- AutomaticSurvey

8. 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.
9. Press 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 press 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.
10. Press OK to start the import procedure.The list contained in the imported file is then opened in the Import dialog window.

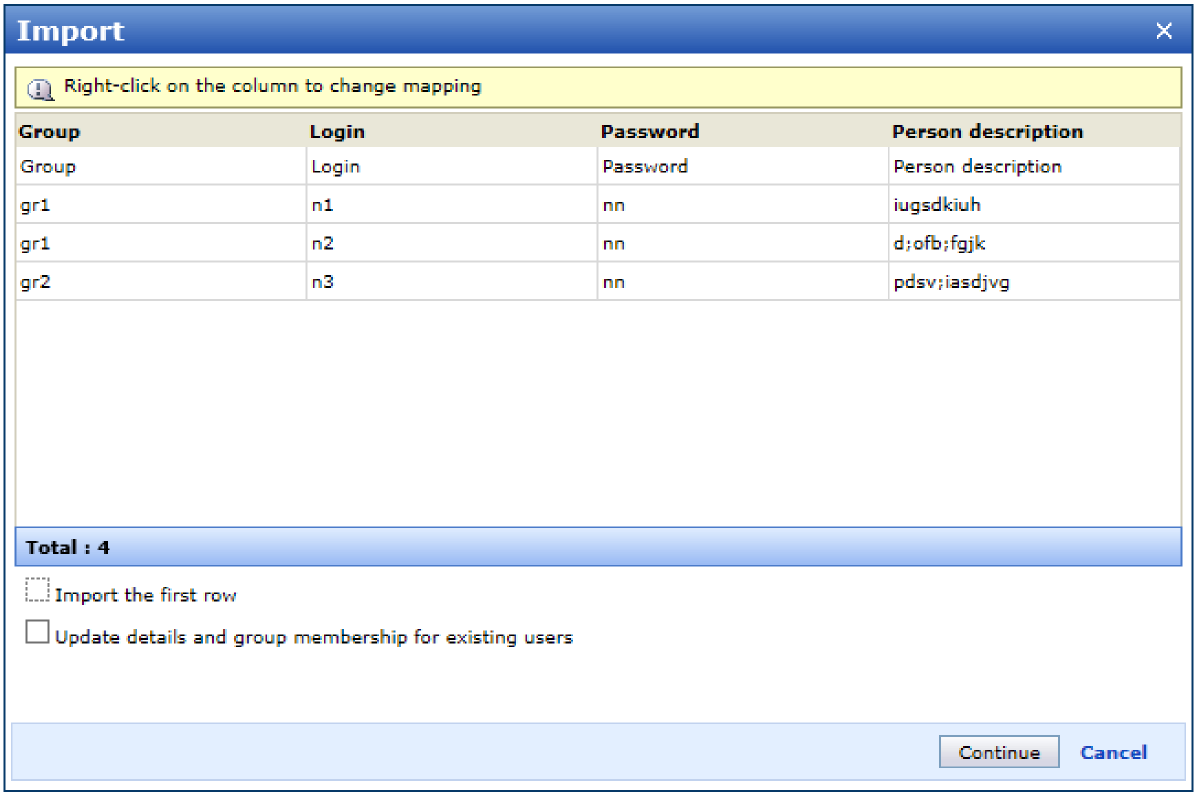


Figure 55 Importing the interviewer list from MS Excel file

Figure 56

11. 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.
12. 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.
13. 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.

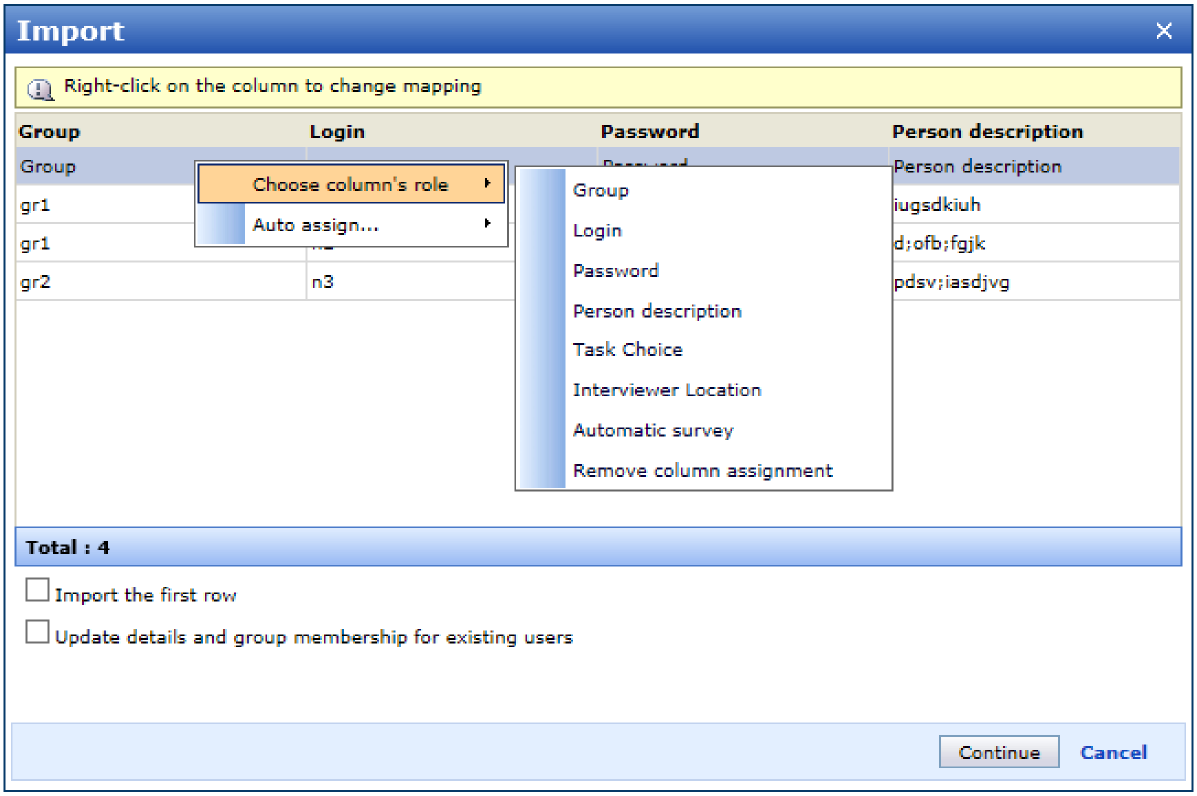


Figure 57 Assigning column roles to the imported table containing interviewer list

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.

8. 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.

15. Finally press 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.

2.2.8 Changing the task choice mode for an interviewer

As a rule the Task Choice mode is specified for each interviewer at the moment her/his properties are configured - see Viewing and modifying the interviewer properties on page 37 for details.

Still the supervisor can instantly 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 instantly change the task choice mode for an interviewer:

1. Display the Interviewer List in the top right frame (see Viewing the interviewer list on page 28 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.

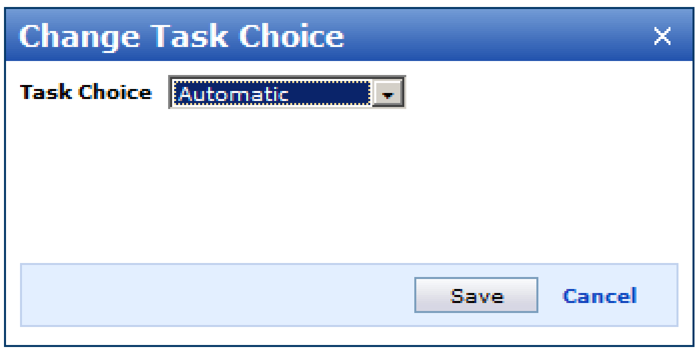


Figure 58 Changing the task choice mode for an interviewer in a dedicated dialog window

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).

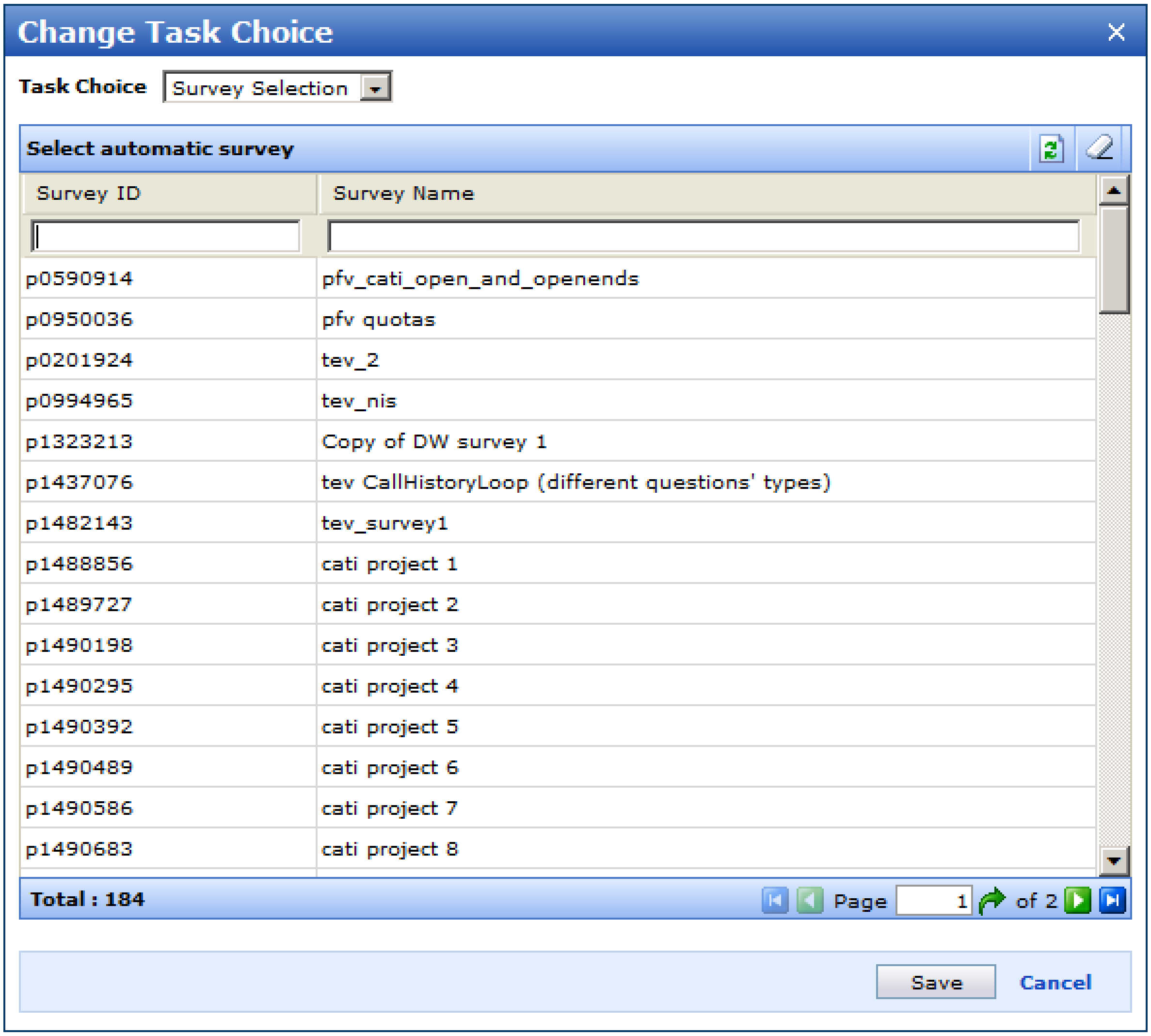


Figure 59 The Change Task Choice dialog window with the Survey Selection mode chosen

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).

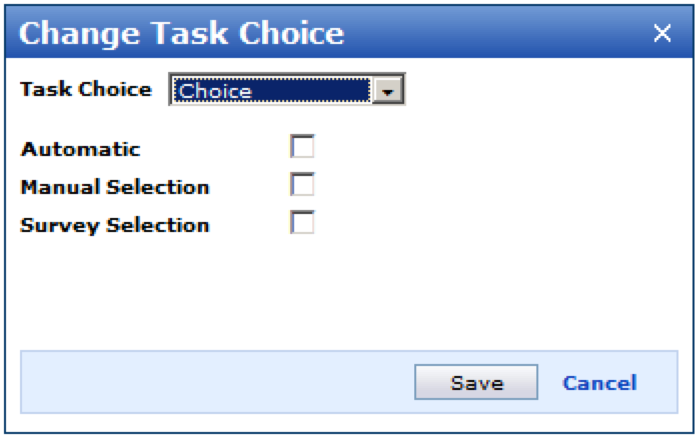


Figure 60 The Change Task Choice dialog window with the Choice mode chosen

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.

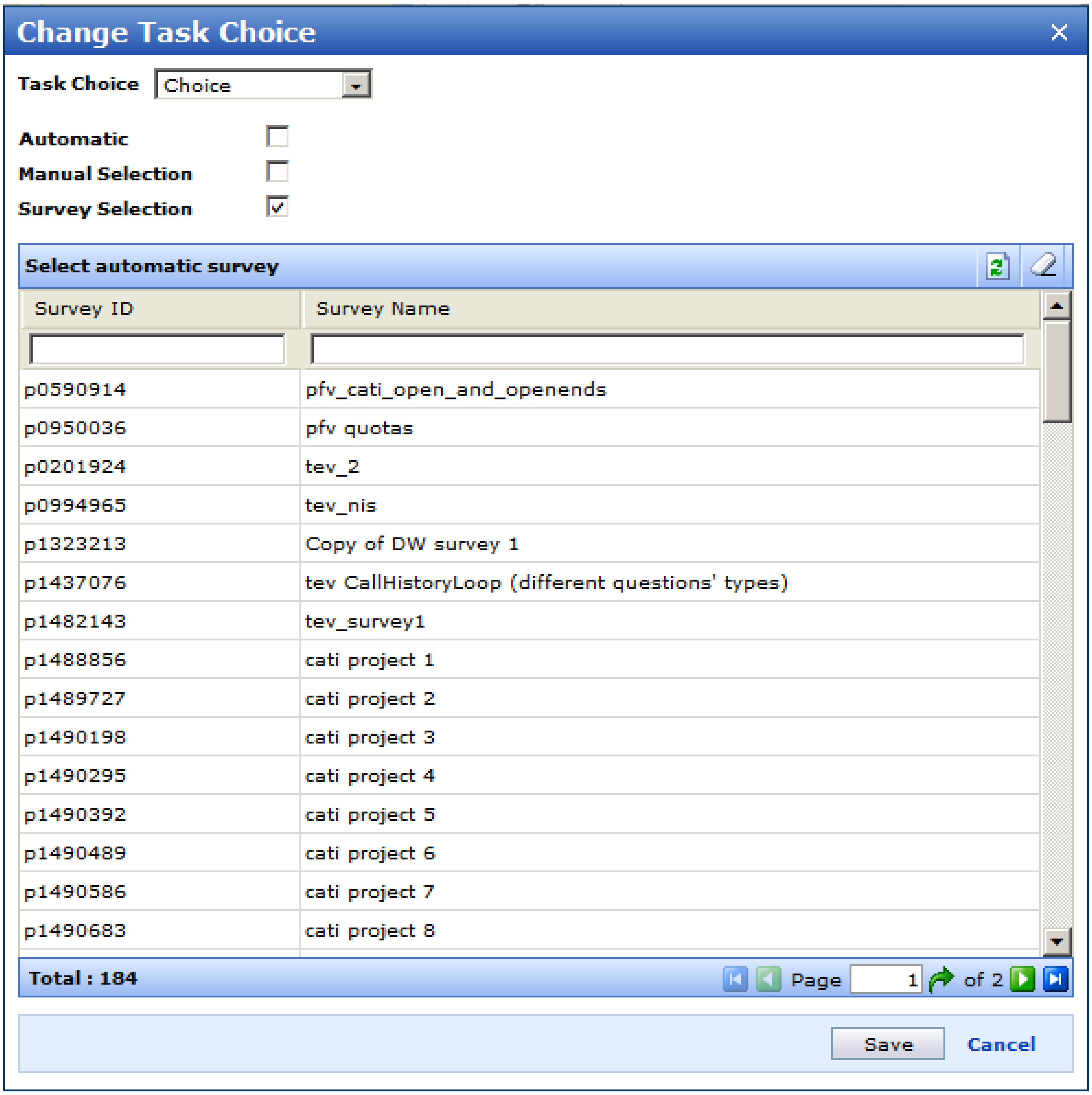


Figure 61 The Change Task Choice dialog window with the Choice mode chosen - configuring the Survey Selection mode

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 - press OK.

2.2.9 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. 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. The Location attribute can be set and changed through interviewer's properties (using the Properties tab - see Viewing and modifying the interviewer properties on page 37), in the New Interviewer dialog window (see Adding and deleting an interviewer on page 30), 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 right frame (see Viewing the interviewer list on page 28 for instructions).
2. Select one or a number of interviewers in the list (you can set the new Location attribute for a number of interviewers at a time). Right-click the selection and choose Change Location from the context menu. This will display the Change Location dialog window.

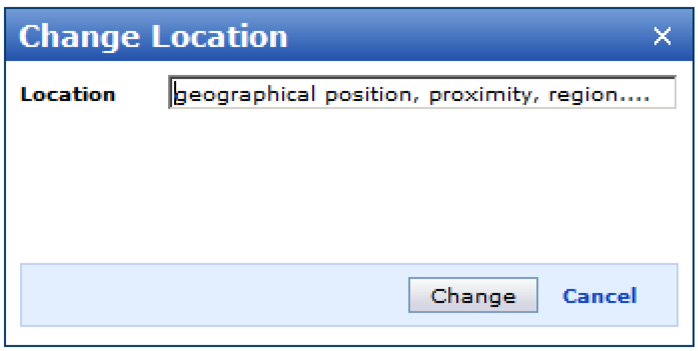


Figure 62 Changing the location attribute in the Change Location dialog window

3. Enter the required location in the Location field. This is a free text field and combination of any symbols is allowed here.
4. If the Location field already contains some value, you can edit it.
5. Press Change when you are done editing. New value will be displayed in the Location column in the Interviewer list.

Comments concerning this topic? Send an email

2.2.10 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 please refer to Configuring the Call Groups on page 333.

Changing a call group for an interviewer

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

   This will display the Change Call Group dialog window.

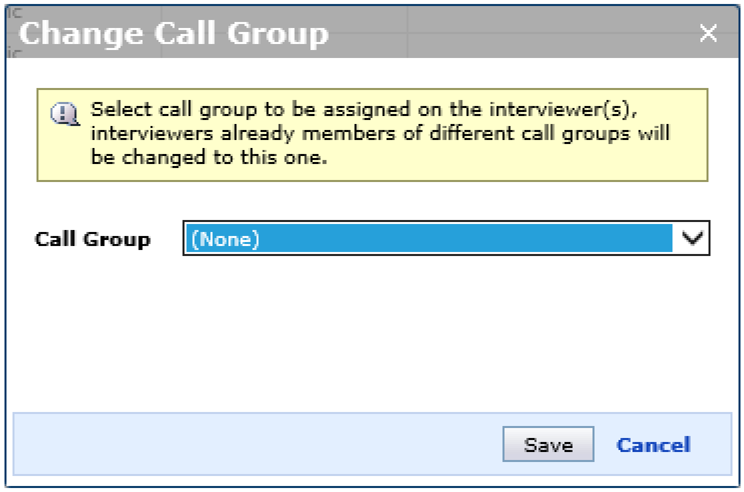


Figure 63 Changing the Call Group for an interviewer

1. Select the required Call Group and press 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 configuration, and survey assignment.

For a survey to be started in the CATI mode it should first be appropriately marked in Confirmit Authoring module (please refer to the corresponding section of 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 the special permission which is set in Confirmit Authoring module. This permission is called "Supervise CATI Project", and it can be found on the Permissions tab (Survey Management section). Please refer to Confirmit Authoring manual for instructions on enabling and disabling this permission. When the "Supervise CATI Project" is enabled for a certain supervisor, it becomes accessible in CATI Supervisor module to that particular supervisor only. When this permission is disabled, the corresponding survey is hidden from this supervisor along with all properties and attributes related exclusively to this survey (for example, the corresponding survey specific filters will no longer be accessible to that supervisor). By default all supervisors belonging to the same call center (please refer to What is a Call Center in CATI Supervisor terms on page 187 for the description of the Call Center concept) that the survey owner belongs to are automatically granted this permission. It can later be removed from the selected supervisors.

All operations with the surveys and interviews/calls are begun by navigating to the Surveys object type with the help of the Navigation Menu contained in the CATI Supervisor module left frame.

Interview/call and survey assignments are configured with the help of the dedicated dialog windows. These separate windows are invoked with the help of commands provided by the right frame interface when it is used for work with Survey objects.

3.1 Viewing the survey list

To view the survey list:

1. Click on the Surveys object name in the Navigation menu in the left frame. This will reveal the All Surveys item.
2. Double-click the All Surveys item in the left Navigation frame, or right-click this item and choose List from the shortcut menu. This will display the list of surveys currently added to the CATI module. The survey list is displayed in the top right frame of the CATI Supervisor main window.

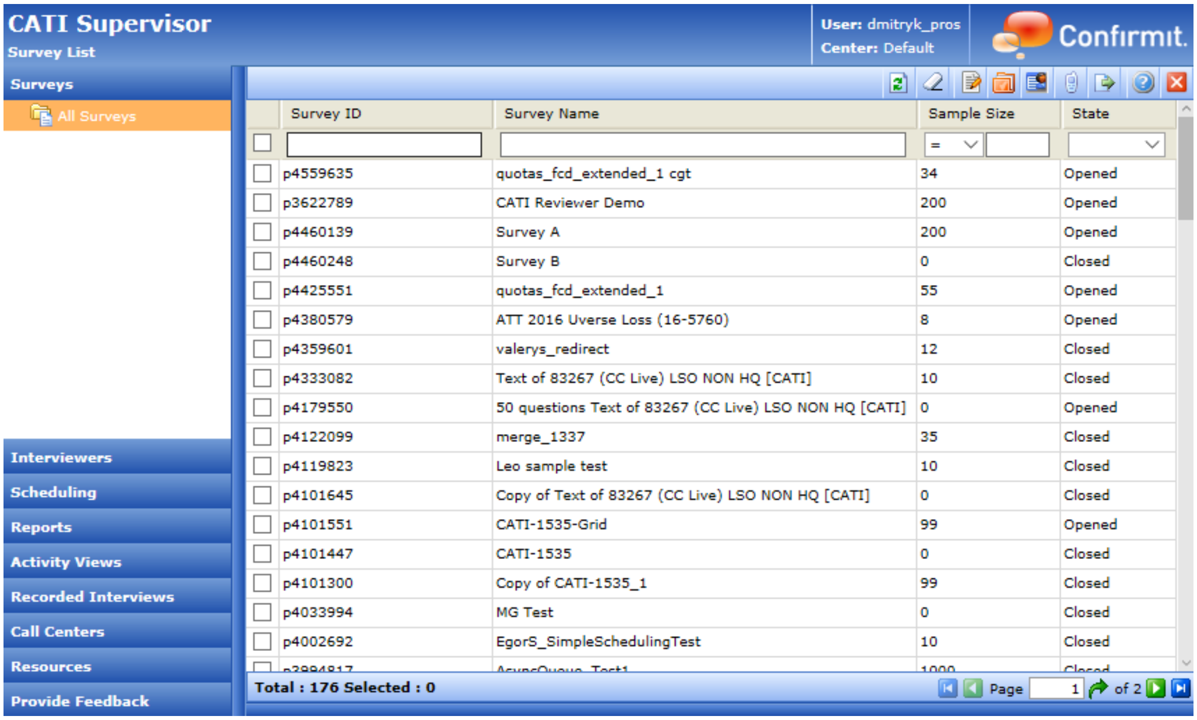


Figure 64 Viewing the survey list

3. The user 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 Productivity and Sample Status Summary reports for a survey;

   All the above listed operations can be performed with surveys 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 survey), or by pressing buttons on the toolbar in the top right frame (the toolbar is located in the frame's title bar).

4. 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 survey list
	CLEAR SELECTION	Deselects all currently selected surveys at once
	GO TO REVIEWER	Displays the Reviewer module window with a list of sessions shown
	VIEW	Displays the survey properties in the bottom right frame and allows them to be modified

	SURVEY ASSIGNMENTS	Displays a list of the survey assignments in a dedicated dialog window
	CALL MANAGEMENT	Displays a list of interviews/calls for the selected survey in a dedicated dialog window
	EXPORT HISTORY LIST	Exports the list of call activity for the selected survey during the selected period
	CLOSE WINDOW	Closes the CATI Supervisor dialog window

3.2 Opening, closing and shutting down a survey

Interviewing on a survey is only possible if it is explicitly allowed.

A special parameter – a survey status – indicates the accessibility of a survey for conducting interviews. It may have two values – Open and Closed. A survey with its status set to Open can be used for conducting interviews. When the status is set to Closed, the survey becomes inaccessible for conducting interviews. The survey status is changed manually, when interviewing process needs to be started, or finished. The current survey status is displayed in the State column of the grid containing the list of surveys. This grid is displayed in the top right frame when the user chooses to view the list of surveys contained in a survey group (see Viewing the survey list on page 59).

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

3.2.1 Opening and closing a survey

To change the survey status:

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 press the View button on the toolbar.

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

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 contents of the top right frame are 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 at the moment, must be instantly 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 press 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. Survey properties are usually set up at the moment the survey is added to the CATI module (this operation is performed using Confirmit Authoring interface – please refer to the Confirmit Authoring manual for details). These 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 view and modification operations are performed using the tabbed interface which is displayed in the bottom right frame of the browser window.

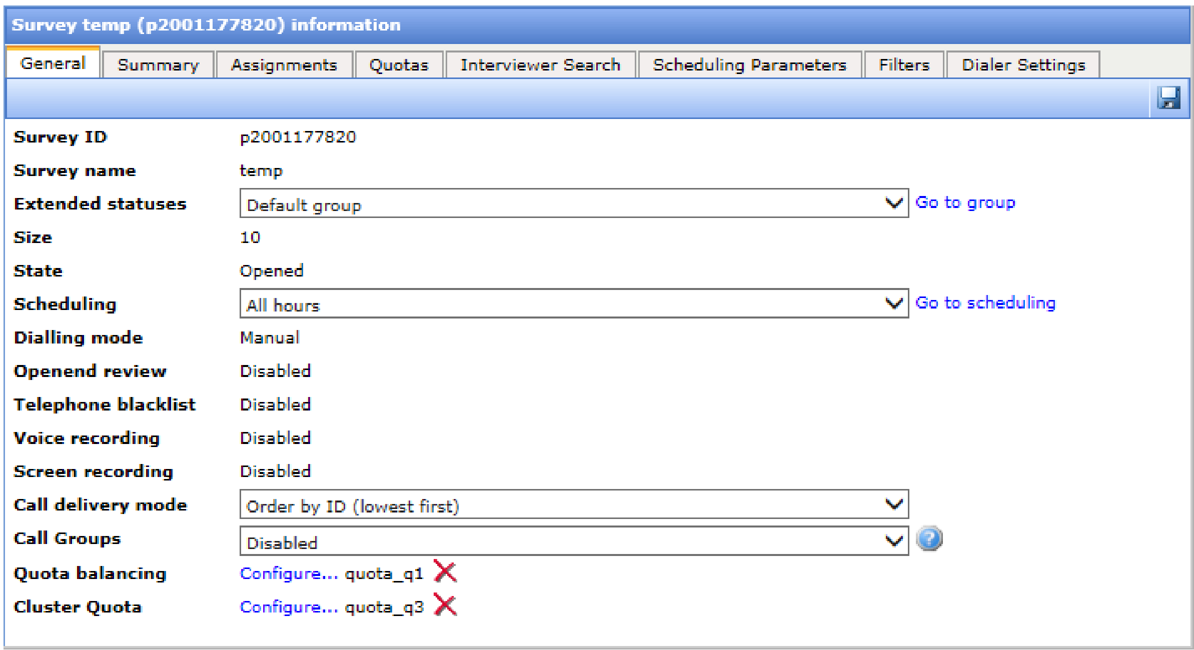


Figure 65 Survey properties displayed in the bottom right frame

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

Press the Save button  on the toolbar to apply changes when you are done modifying the properties settings.

3.3.1 Viewing and modifying general properties of a survey

To view and modify general survey properties:

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 View from the shortcut menu, or press the View button on the toolbar.

   This will display the survey properties in the bottom right frame of the browser window. This view is called Survey information. Survey properties are grouped using tabs.

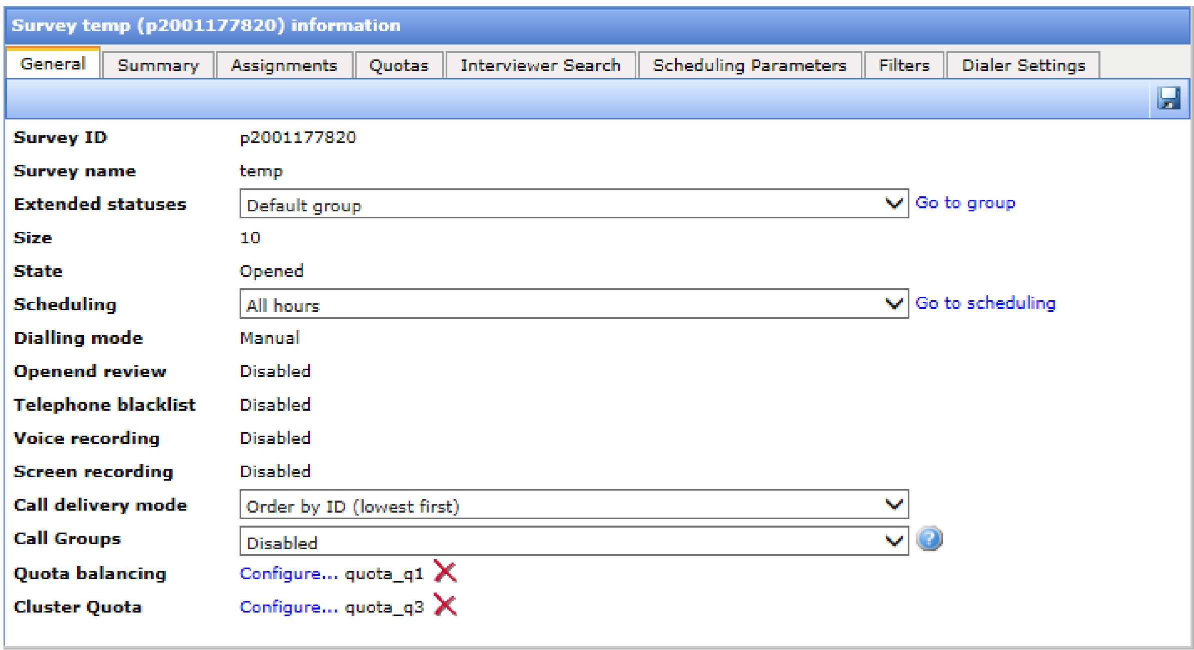


Figure 66 Survey properties - General tab

3. The 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. It cannot be changed.

   The **Survey Name** is defined at the time the survey is added to the system. It cannot be redefined using the CATI Supervisor interface. Please 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 Codes on page 327. Every Extended Status group contains a customized set of Extended Status codes.

The **Go to...** links which can be found next to the **Extended Statuses** and **Scheduling** fields allow changing directly to the Extended Status Codes group (see Configuring the Extended Status Codes on page 327 for details) or Scheduling script (see Modifying the existing Scheduling script settings on page 207 for details) that is currently selected for this survey.

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. Please 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. Please 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 Creating and managing the telephone number blacklist on page 352 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 Deferred monitoring in CATI Supervisor on page 315).

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 - refer to Recording and playing back conversations held in the course of the interview on page 169 for instructions on playing back the interview audio recording. 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 (see Deferred monitoring in CATI Supervisor on page 315).

Note that Voice and Screen Recording options are set up in the Confirmit Authoring module - please consult 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 task choice mode (see Selecting a Survey/Interview on page 248 for descriptions of the task choice modes). Two call delivery modes are available: Order by ID (lowest first) and Random order. When the Order by ID option (default setting) is set, the interviewer will get interviews in the order in which they were loaded to the survey. When the Random order option is set, the interviewer will get interviews in the random order. This setting can be changed at any time and will take almost immediate effect. If the interviewer logs into the system in "Automatic" task choice mode and the surveys he/she is assigned to have a mixture of "Order by ID (lowest first)" and "Random order" the calls may not be delivered in the expected order.

The **Call Groups** drop-down list allows defining a set of calls with certain extended statuses that would be delivered to the interviewers according to a certain algorithm before other calls (refer to Configuring the Call Groups on page 333 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. Please refer to Quota balancing on page 86 for complete description of the Quota Balancing settings and instructions on setting up of this option.

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. Please refer to Quota clustering on page 92 for complete description of the quota clustering settings and instructions on setting up of this option.

4. If you have introduced changes to any of the properties described herein, the Save button on the frame toolbar starts flashing prompting you to save the changes.

   Press the Save button on the toolbar to apply changes when you are done modifying the properties settings.

   When you try leaving the page while the Save button flashes, CATI Supervisor prompts you by displaying the warning message.

3.3.2 Viewing the sample information corresponding to each extended status

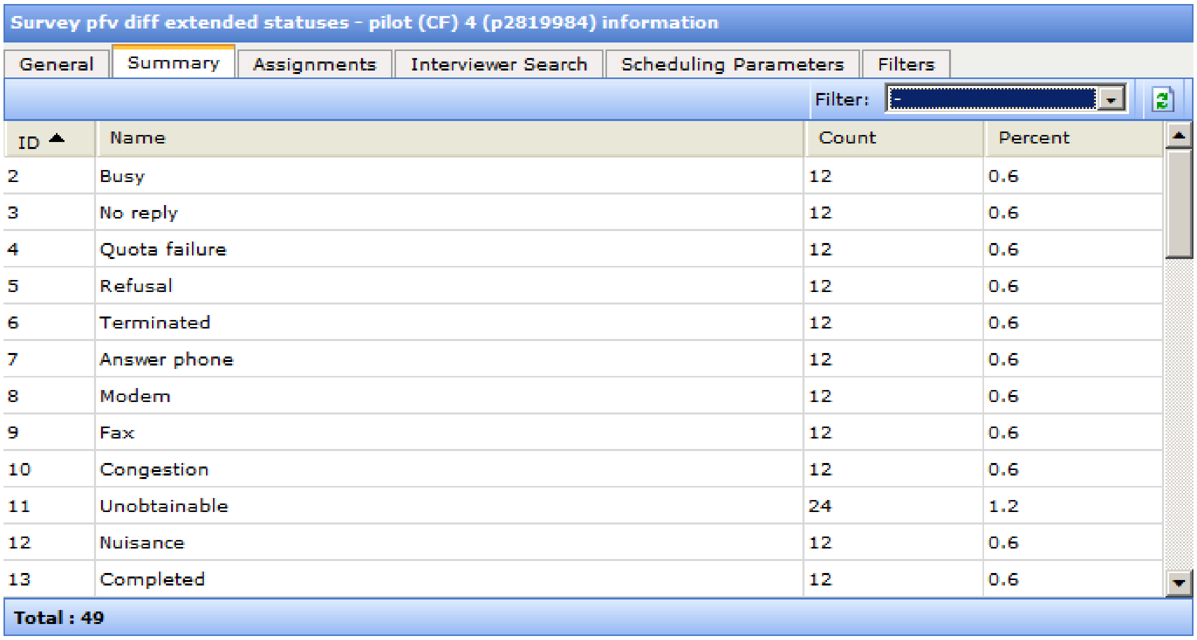
The Summary tab of the Survey Properties view presented in the bottom right frame contains information regarding the sample data available for each extended status.

To view the sample information:

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 press the View button on the toolbar.

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

   Change to the Summary tab.



ID	Name	Count	Percent
2	Busy	12	0.6
3	No reply	12	0.6
4	Quota failure	12	0.6
5	Refusal	12	0.6
6	Terminated	12	0.6
7	Answer phone	12	0.6
8	Modem	12	0.6
9	Fax	12	0.6
10	Congestion	12	0.6
11	Unobtainable	24	1.2
12	Nuisance	12	0.6
13	Completed	12	0.6

Figure 67 Survey properties - Summary tab

The values are displayed in the Summary tab using a grid. Grid columns represent the following value types:

- ID – an Extended Status ID;
- Name – Extended Status name;
- Count – the number of interviews with that Extended Status;
- Percent – percentage of interviews with that Extended Status to the total number of interviews in that survey.

3. The user 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 bottom right frame will then be refreshed and display only interviews matching the selected filter criteria.
4. The user at any time can refresh the list displayed in the grid 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.

Note that there are three ways you can view and modify the survey assignments – using the procedure described below, or with the help of the Survey Assignments dialog window (see Viewing survey and interviewer assignments in the Survey Assignments window on page 179 for this procedure description). You can also assign persons and groups directly to the survey you select in the Survey List (see Adding and replacing assignments for a selected survey on page 175 for instructions).

The procedure described below allows users to be assigned or de-assigned to/from the current survey.

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 press the View button on the toolbar.

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

   Change to the Assignments tab.

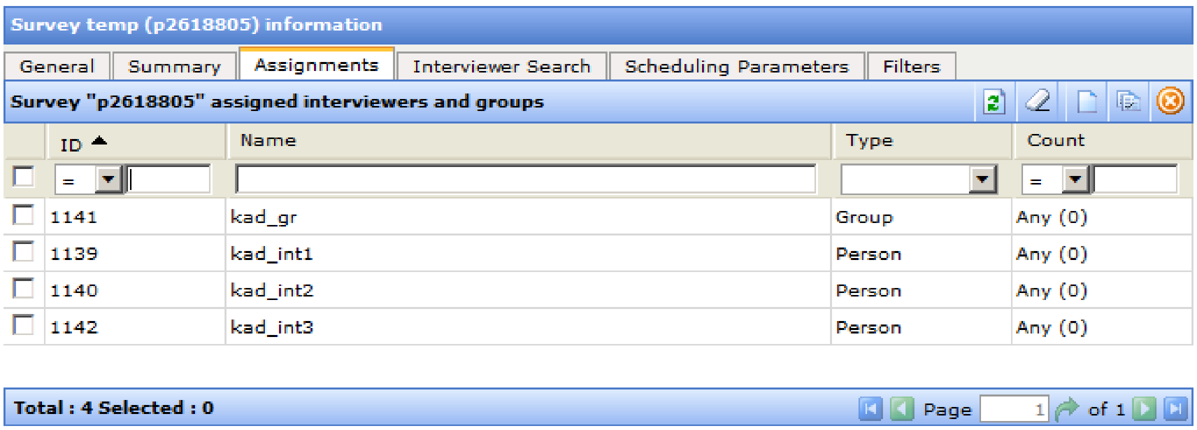


Figure 68 Survey properties - Assignments tab

3. 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. Since this tab lists persons and groups already assigned to the current survey interviews (if any), you can de-assign selected persons/groups.

   To do this you should first select the required persons/groups by checking boxes in the first grid column (or click the required items while holding down Ctrl or Shift keys on the keyboard to create a multiple selection).

   The selection is cleared when you press the Clear selection button on the toolbar.

   After the selection is complete you can press 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. These persons/groups disappear from the list.
5. You can also instantly assign persons/groups to this survey.

   To do this, press the New button on the Assignments tab toolbar. This will display a dialog window which can be used to assign new persons/groups to the current survey.

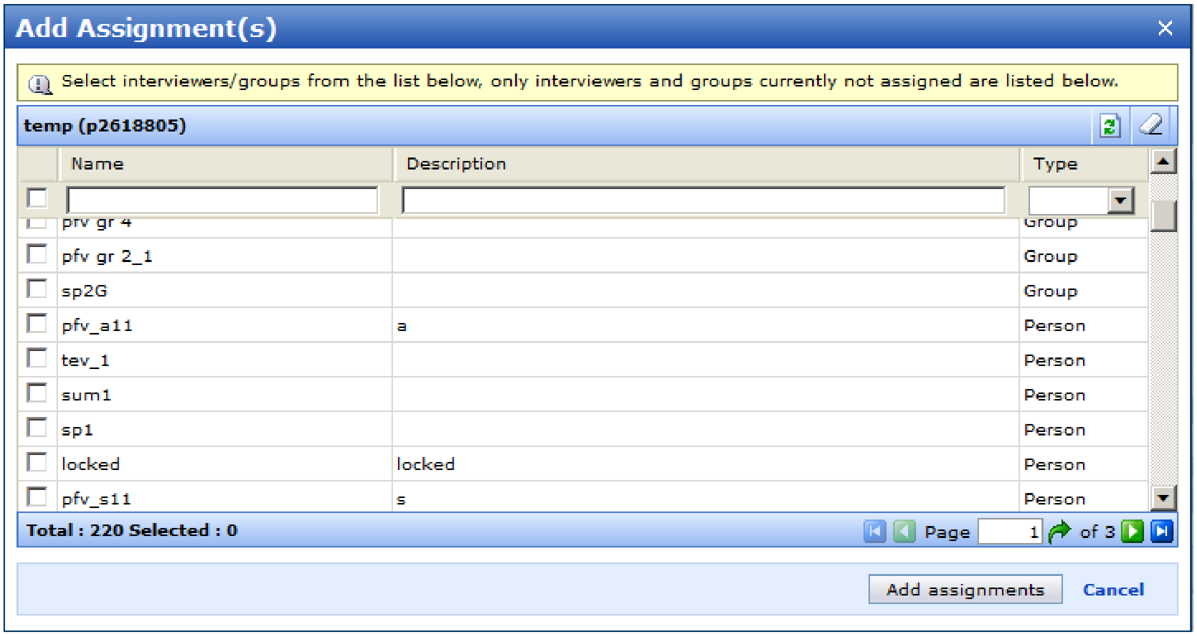


Figure 69 Assign to survey dialog window

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. Check a box in front of the required item and press OK in the bottom of the window to add a new assignment.

The specified assignment is added to the list of already existing assignments.

You will notice that the Assignments tab refreshes, and the selected persons/groups appear in the list of the assigned person/groups.

6. You can replace all the existing assignments for the current survey while creating new assignments.

   To do this, press the Replace button  on the Assignments tab toolbar. This will display a dialog window which you can use to replace assignments.

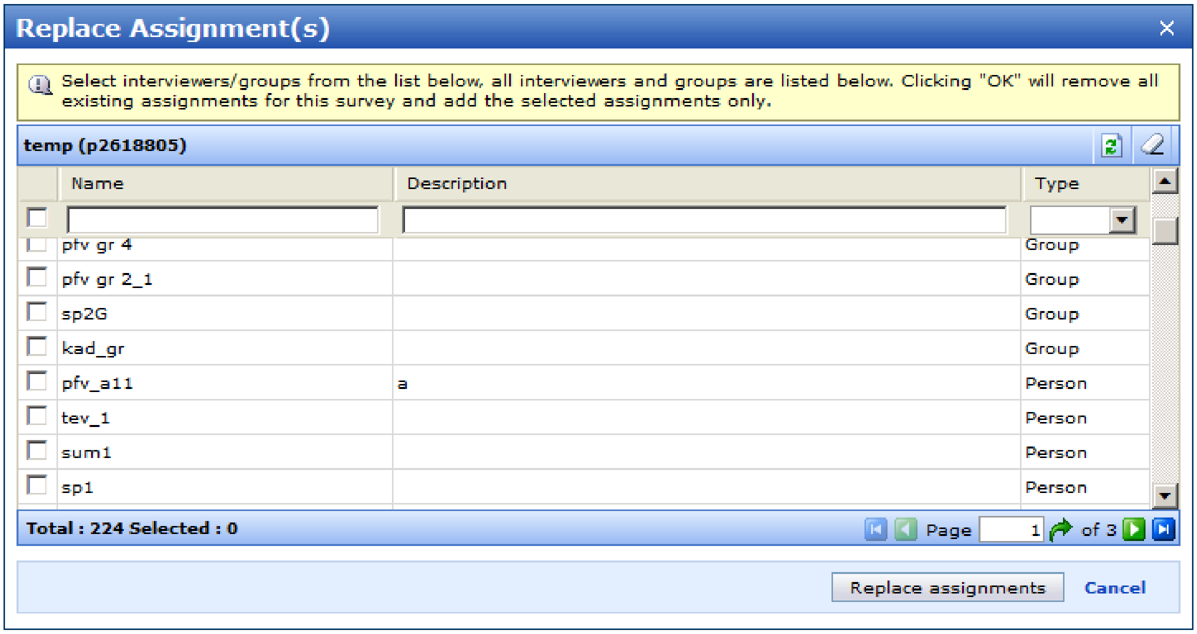


Figure 70 Replace survey assignments dialog window

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. Check a box in front of the required item and press OK in the bottom of the window to replace assignments.

CATI Supervisor displays the warning message, asking you to confirm the assignment replacement action.

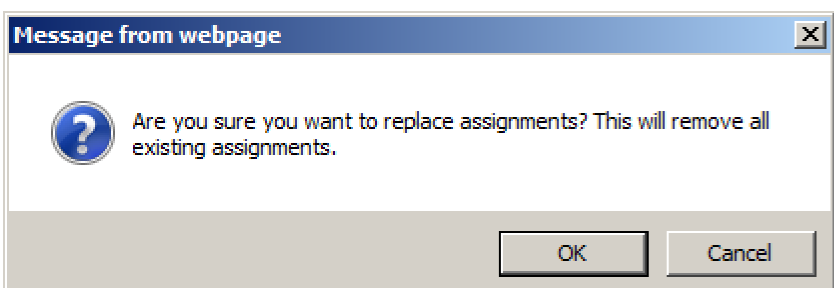


Figure 71 Warning message displayed on the attempt to execute the assignment replacement

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

You will notice that the Assignments tab refreshes, and the selected persons/groups appear in the list of the assigned person/groups in place of the previous assignment.

Please note that you can also add or replace assignments directly from the survey list in the top right frame with the use of the context menu commands (see Adding and replacing assignments for a selected survey on page 175).

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, please refer to Confirmit Authoring manual for quota definition description and instructions on how to set up quota definitions.

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 Viewing and modifying survey quota settings on page 70);
- activating interviews/calls which fall into certain quota cells (see Activating interviews which fall into certain quota cells on page 78);
- changing call priority for interviews/calls which fall into certain quota cells (see Changing the priority of calls which fall into certain quota cells on page 79);
- enabling interviews/calls which fall into certain quota cells (see Enabling calls which fall into certain quota cells on page 79);
- disabling interviews/calls which fall into certain quota cells (see Disabling calls which fall into certain quota cells on page 80).

For description of the Activate, Disable and Enable actions please refer to Activating an interview/call on page 135 and Disabling and enabling calls on page 120. 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 Setting up the Action filter on page 83).

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 Quota balancing on page 86 for details.

NOTE 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. Similar rule is used with the Call Counts counter.

Viewing and modifying survey quota settings

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 View from the shortcut menu, or press the View button on the top right frame toolbar.

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

   Change to the Quotas tab.

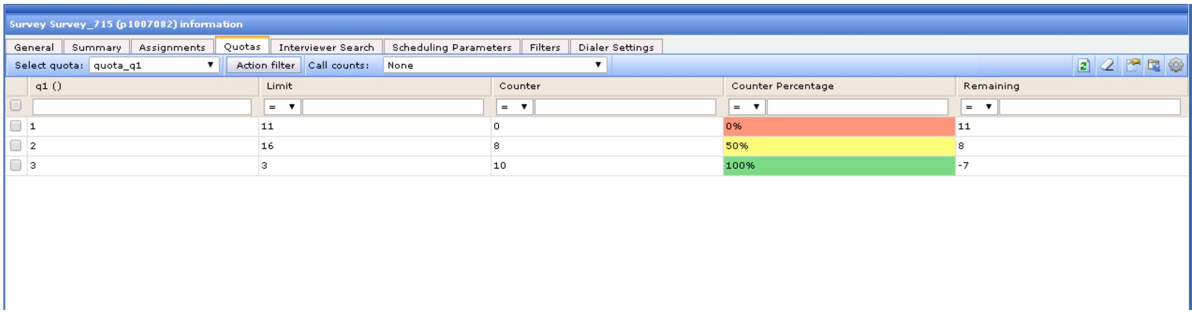


Figure 72 Survey properties - Quotas tab

3. To view the particular quota settings you should first select the required quota from the Select quota drop-down list above the grid. 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) defined in the quota,
- 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),
- the 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 description below).

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 maximise or move into a preferred position on the screen.

   To open a particular quota view in a separate window you should first select the required quota using the Select Quota drop down list in the bottom right frame and, when the quota information is displayed, press 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 bottom right frame (see the picture below for illustration).

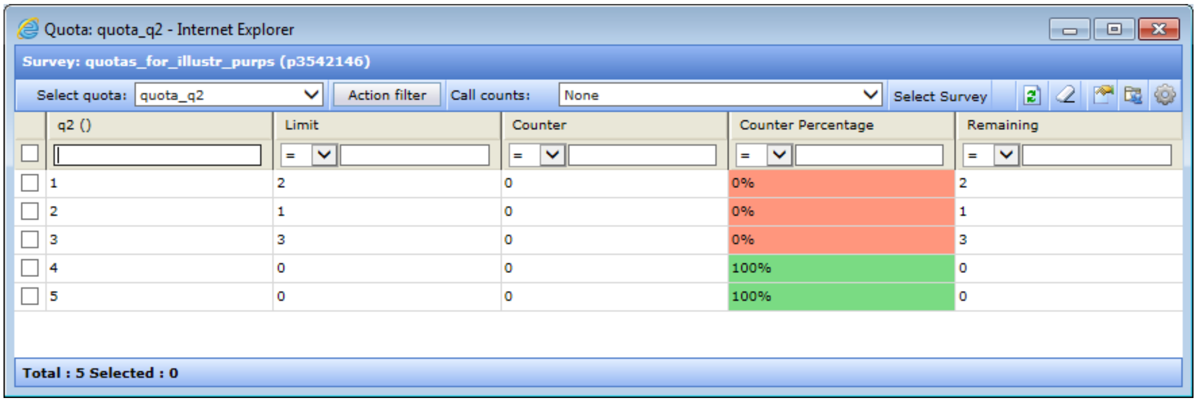


Figure 73 Quota opened in a separate window

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

In addition to displaying the quotas in a dedicated window a new ‘Select Survey’ button is presented in the toolbar which allows the user to switch focus to quotas of a different survey.

To do so you have to click the Select Survey button. This opens the Select Survey dialog which is used to select another survey which is then used to choose a quota to display.

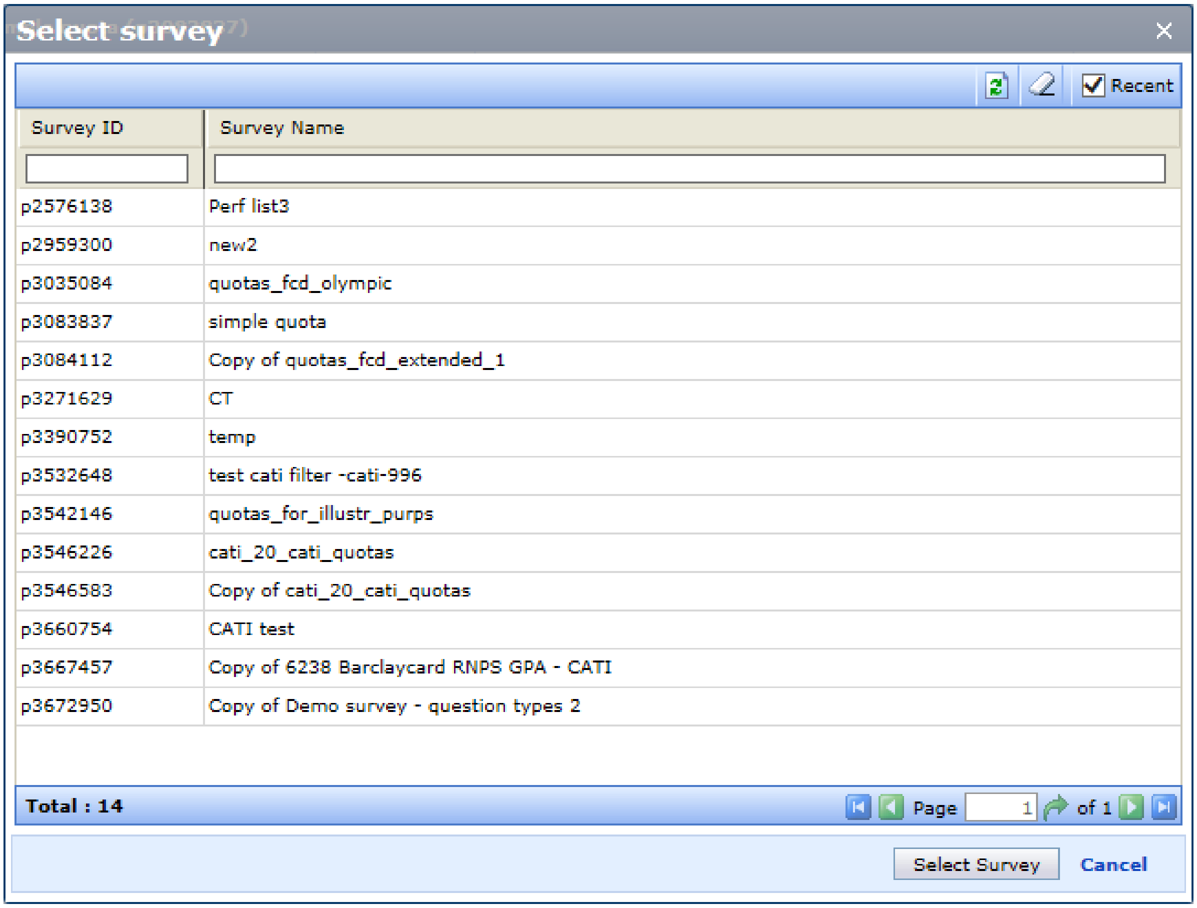


Figure 74 Selecting a survey in the Select survey window

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 It should be taken into account that any survey can be used with different call centers and thus may have it's interviews change their extended status in one call center while it retains the same value in another call center. Please mind that in such case the change of the extended status is sensed only in the call center where it took place - in other call centers that use this survey such a change will not be applied, and the survey containing such interview will not be treated as "recent".

5. 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 press 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.

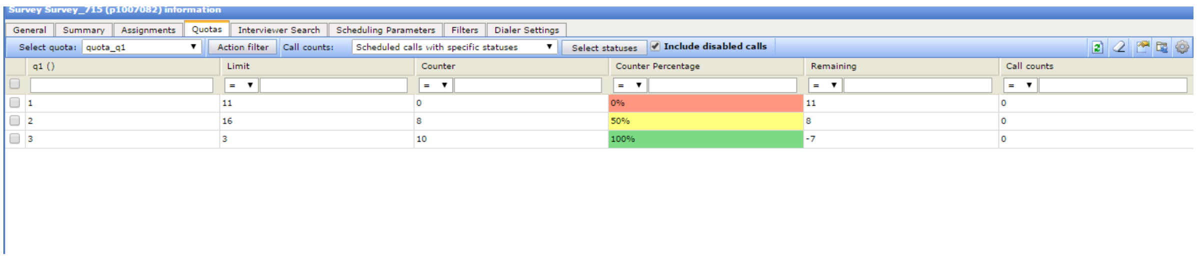


Figure 75 Quotas tab displaying the Call counts column

When the chosen filter assumes additional configuration by selecting the specific statuses, you should press 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 box), 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.

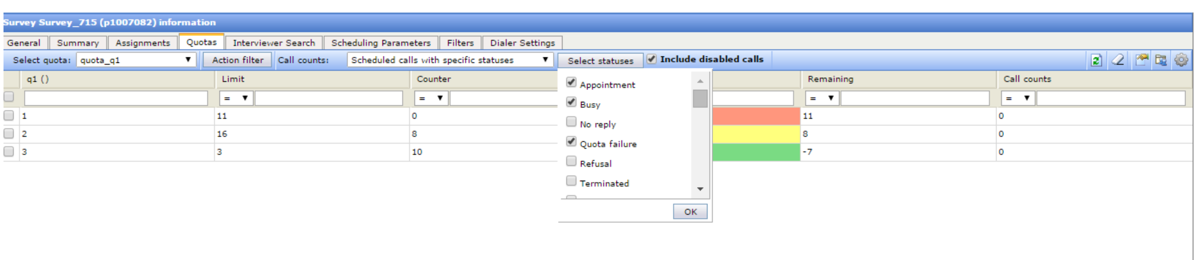


Figure 76 Selecting statuses to configure the filter for the Call counts counter

When all the required statuses are selected, press OK below the scrollable list to apply the filter condition.

Again, when the grid is not refreshed automatically you should press 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 press the Refresh button.

6. 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 two quotas displayed simultaneously on the Quotas tab.

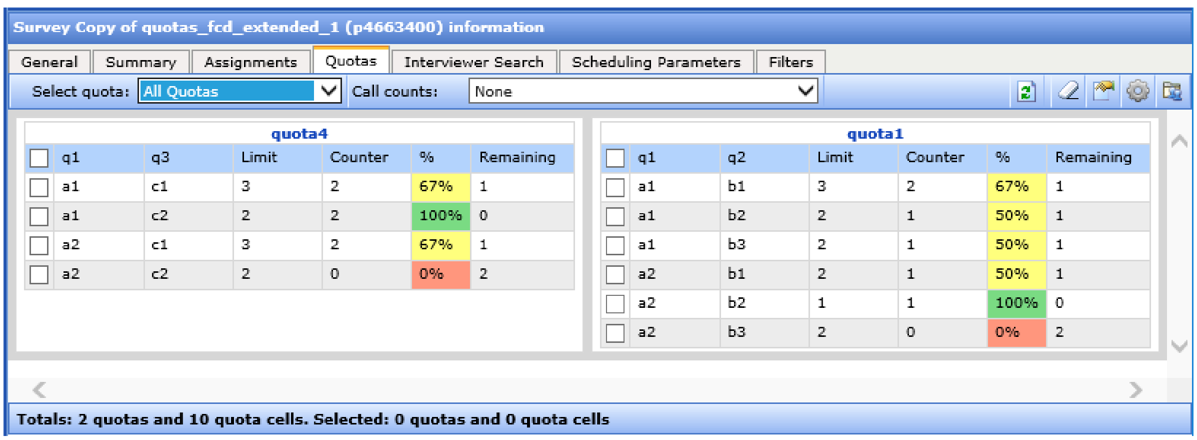


Figure 77 All quotas displayed in a single view on the Quotas tab

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).

7. 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).

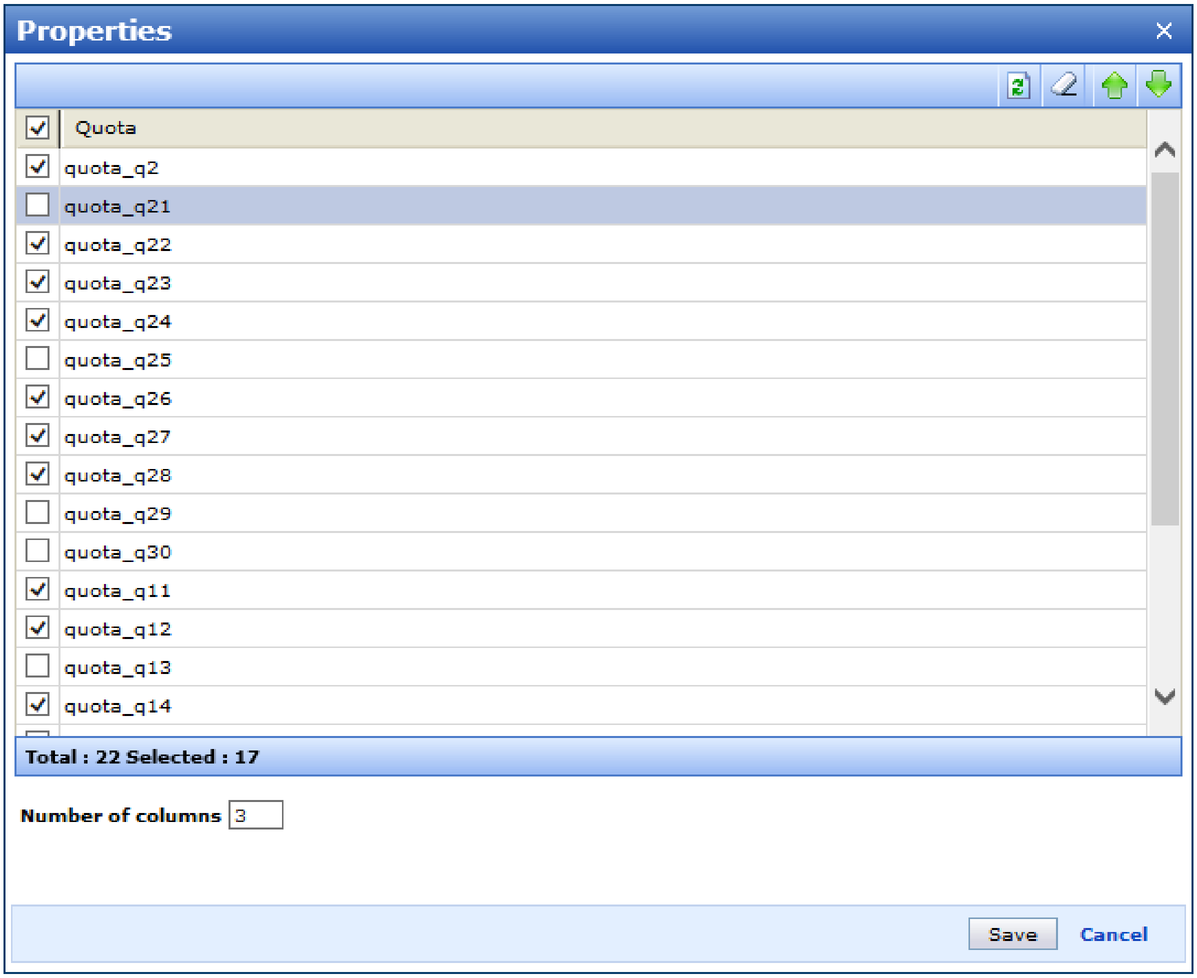
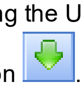


Figure 78 The Properties dialog window for the Quotas tab

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. Press 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 please 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).

You can change the order in which quotas are displayed in the grid. Select the quota by clicking its name in the list in the Properties tab. Move the selected quota closer to the start by pressing the Up button  located on the Properties tab toolbar or closer to the end by pressing the Down button .

8. At any time you can press the Refresh button in the frame toolbar to check the latest values for ALL counters.
9. 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.
10. All changes to quota cell limit values are saved automatically upon editing.

Changing limit for a single or for a number of 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 press the Change limit button in the frame toolbar.
3. Any of these actions will display the Change Limit dialog window.

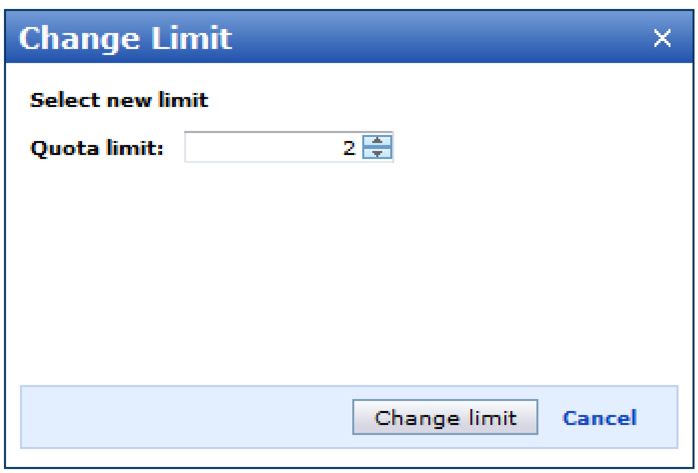


Figure 79 Changing limit for a quota target

The dialog shown above is displayed when quota cells belonging to a single quota are selected.

When you select quota cells belonging to different quotas the Change Limit dialog will inform you of the amount of quotas and quota cells included in the selection and will also provide a prompt explaining how the limit will be changed in such case (see illustration below).

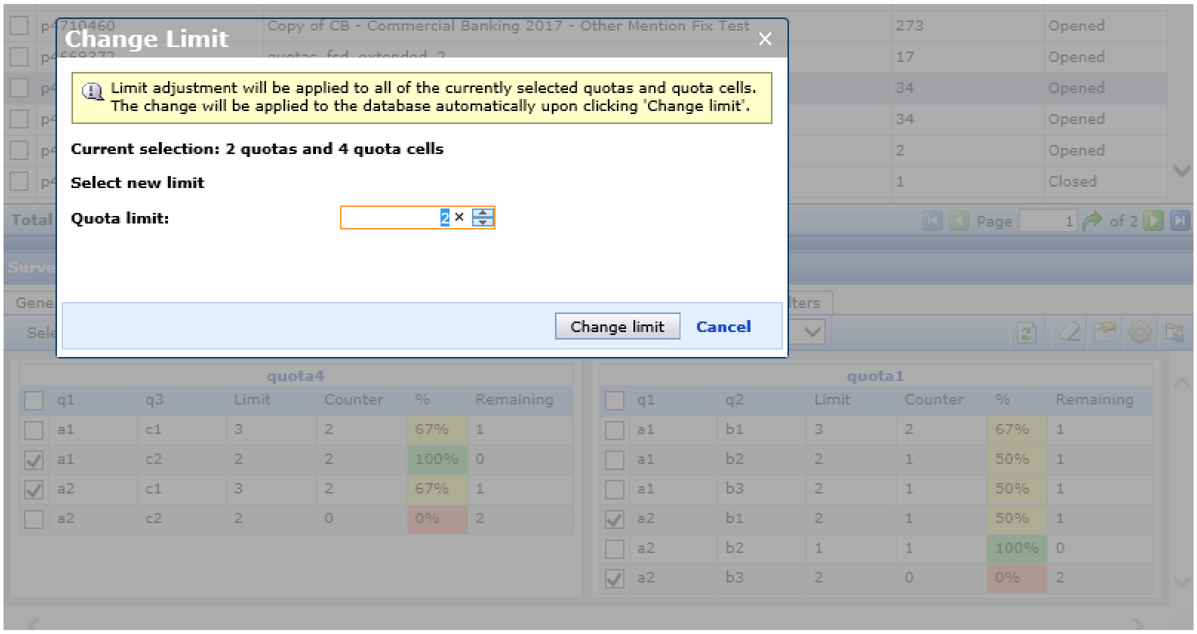


Figure 80 Changing limit for multiple quotas and quota cells

Type the new value in the Quota limit field, or use the spin control to change the displayed value. Press 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.

Activating interviews which fall into certain quota cells

Please refer to Activating an interview/call on page 135 for detailed description of the Activate action.

When it is run from the Quotas tab, the Activate action activates all interviews which fall into the selected quota cells taking into account the Action filter settings (see Setting up the Action filter on page 83 for instructions).

1. Display the Quotas tab in the bottom right frame.
2. Select the required quota cells in the grid in the Quotas tab, then right-click the selection and choose Activate from the context menu that appears. This will display the Activate... dialog box.
3. Refer to Activating an interview/call on page 135 for instructions on how to set up the Activate action.
4. 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.

   Please pay attention 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).
5. Remember that disabled calls can be activated, but they will not be delivered to the interviewers. Disabled calls become available for delivery to the interviewers when they are enabled.

The Activate dialog box 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 thus become available for delivery to the interviewers. By default this option is NOT enabled.

6. Follow the instructions contained in Activating an interview/call on page 135 to complete the procedure.

Changing the priority of calls which fall into certain quota cells

Please refer to Changing a call priority on page 143 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 Setting up the Action filter on page 83 for instructions).

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

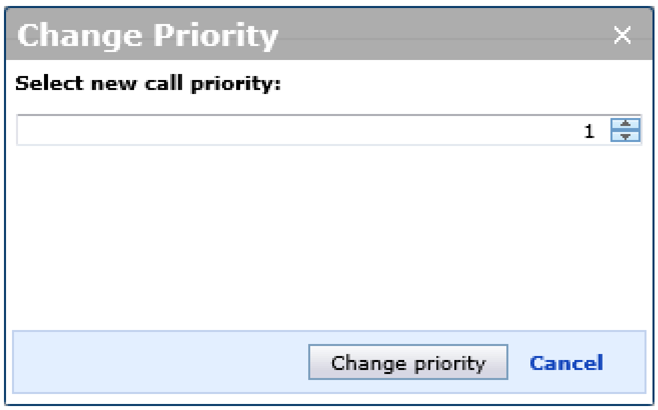


Figure 81 Changing priority of calls falling into quota cell(s)

3. Refer to Changing a call priority on page 143 for instructions on how to set up the Change priority action.
4. Follow the instructions contained in Activating an interview/call on page 135 to complete the procedure.

Enabling calls which fall into certain quota cells

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

Please refer to Disabling and enabling calls on page 120 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 Setting up the Action filter on page 83 for instructions).

1. Display the Quotas tab in the bottom right frame (see Viewing and modifying survey quota settings on page 70 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. This will display the following confirmation message.

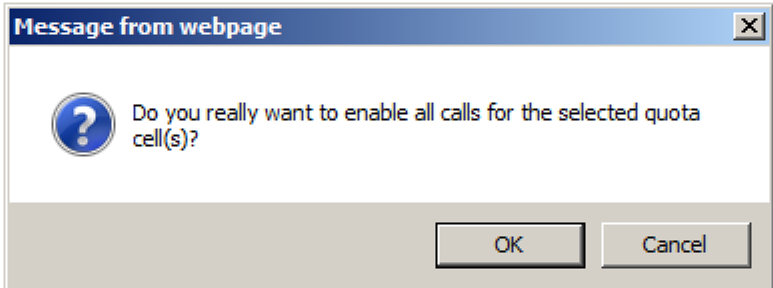


Figure 82 Confirmation prompt displayed when the Enable action is started

Press OK to proceed.

3. The Enable calls in selected quota cells dialog box is displayed then.

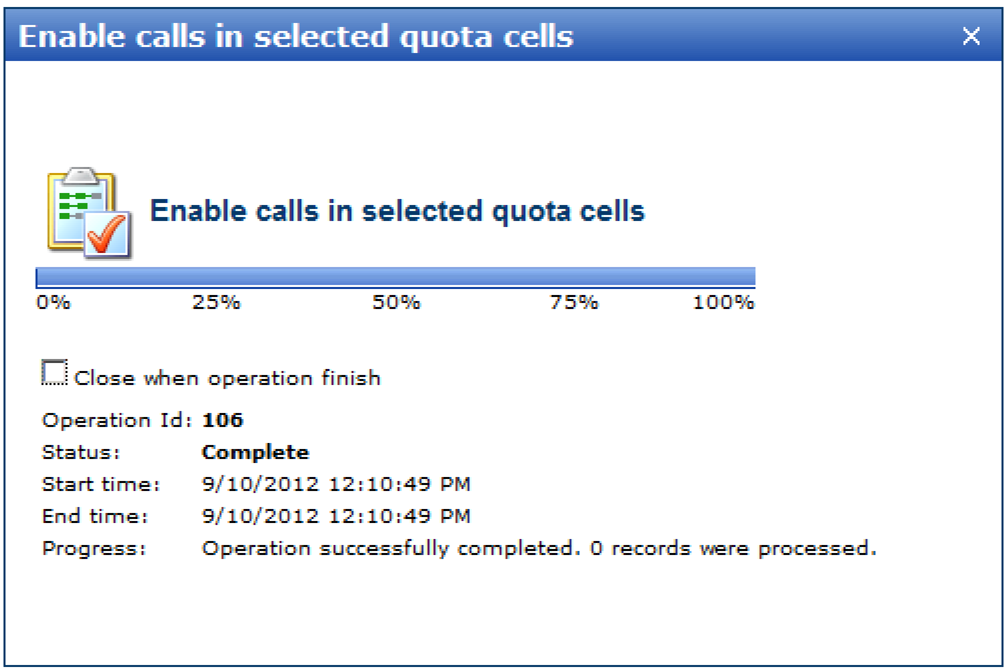


Figure 83 Enable selected calls dialog box

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. Please refer to Activating an interview/call on page 135 for description of this dialog box.

4. When it 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 Setting up the Action filter on page 83 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 Activating an interview/call on page 135.

Disabling calls which fall into certain quota cells

Any call that falls into a certain quota cell can be disabled.

Please refer to Disabling and enabling calls on page 120 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 Setting up the Action filter on page 83 for instructions).

1. Display the Quotas tab in the bottom right frame (see Viewing and modifying survey quota settings on page 70 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. This will display the following confirmation message.

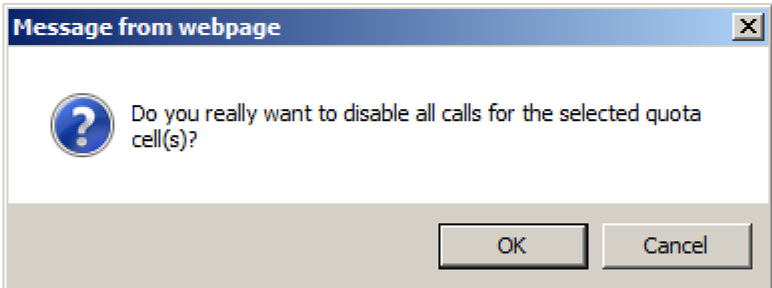


Figure 84 Confirmation prompt displayed when the Disable action is started

Press OK to proceed.

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

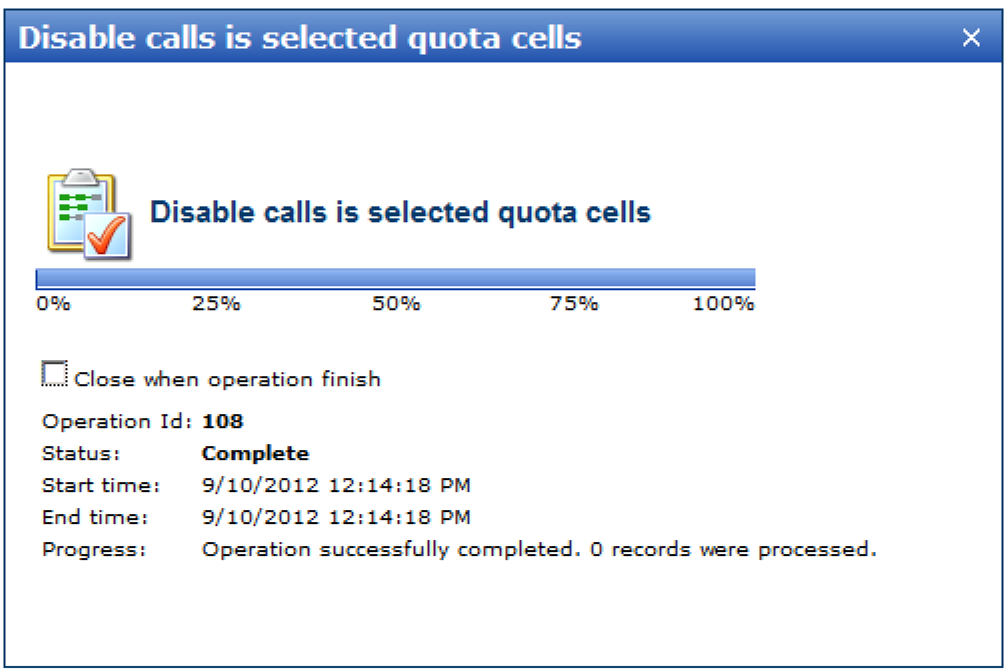


Figure 85 Disable selected calls dialog box

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. Please refer to Activating an interview/call on page 135 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 Setting up the Action filter on page 83 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 Activating an interview/call on page 135.

Opening and closing quota cells

Besides 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 doing this: "Open cells" and "Close cells".

Closing a quota cell will introduce the same behaviour 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. Please check the quota cell state in the CATI Supervisor to ensure complete control over the quota cell state.

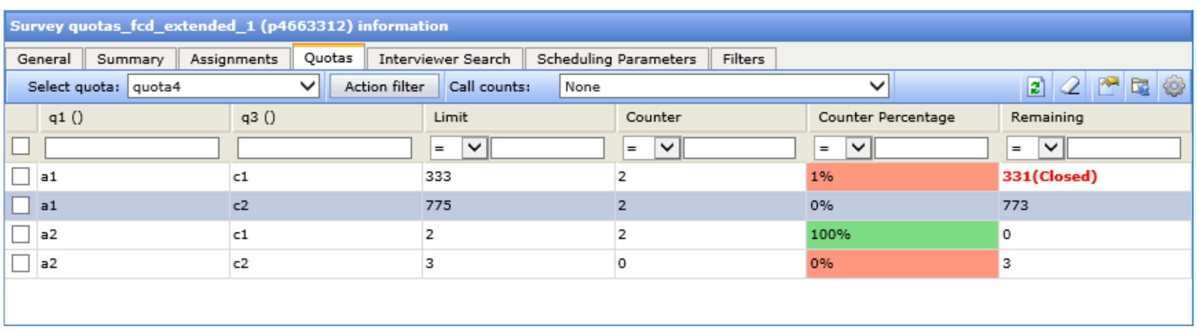


Figure 86 Closed quota cell with remaining calls (value highlighted in red)

Calls falling into this quota cell are disabled and are marked correspondingly in the Call Management window (yellow highlighting and "Disabled by Quota" mark - see the picture below).

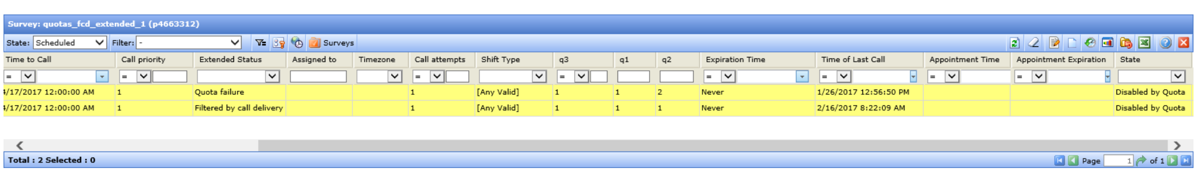


Figure 87 Disabled by Quota calls that fall into the closed quota cell as shown in Call Management

Opening the closed quota cell will automatically re-enable all the applicable calls (falling into this quota cell).

Note that unlike the "Disable"/"Enable" option the "Close cells"/"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 you should choose the corresponding quota handling behaviour. This is done on the Settings tab (in the Resources menu), see General settings group on page 365 for instructions. The "Call filtering behaviour for filled quotas" option should be set to "Disable calls with re-enabling on open cell(s)". You should select this setting before you can use the "Close cells"/"Open cells" feature.

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 "Remaining" value for the selected quota cell(s) is highlighted in red and the "Closed" mark is displayed next to it.

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 right frame (see Viewing and modifying survey quota settings on page 70 for instructions).
2. From the Select quota drop-down list select the quota for which you want to set up an action filter.
3. Press the Action filter button next to the Select quota drop-down list. A form similar to the one shown below will unfold below the button.

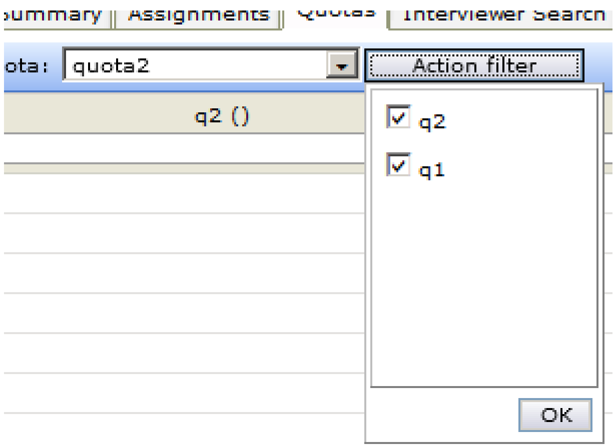


Figure 88 Action filter setup form

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. Press 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.

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 step 4 of the Viewing and modifying survey quota settings on page 70 instruction).

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 Viewing and modifying survey quota settings on page 70 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 step 4 of the Viewing and modifying survey quota settings on page 70 instruction).

   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.

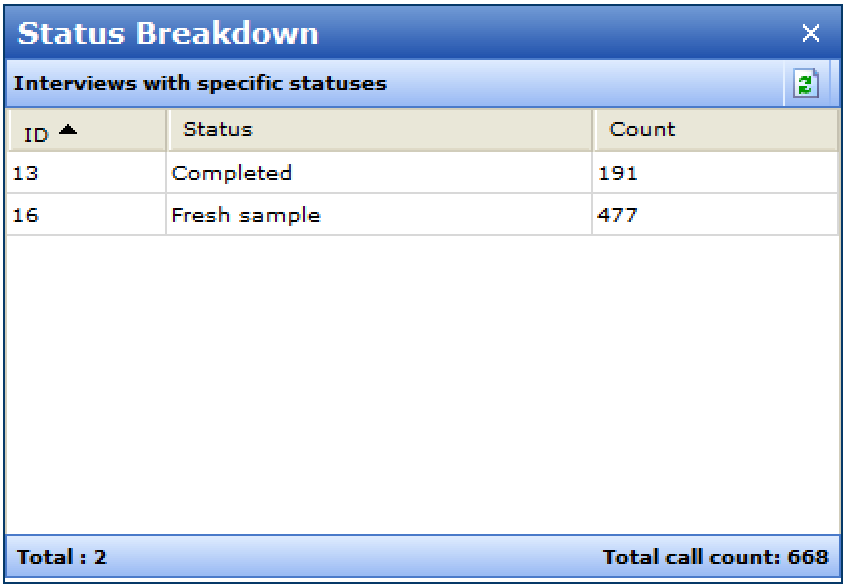


Figure 89 Viewing the Status Breakdown information for a quota cell

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. Press the Close button to close the dialog window.

Transferring quota filter to Call Management

This operation allows instantly creating a filter using certain quota cell (or a number of cells) as condition and applying 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 rest interviews/calls will appear hidden.

1. Display the Quotas tab in the bottom right 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 appear hidden.

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, please 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. Refer to Viewing and modifying survey quota settings on page 70 for more information on CATI quotas.

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 for Balancing option (available on the General tab of the Survey properties view - see Viewing and modifying general properties of a survey on page 63). The system uses these settings to balance the filling of the quota cells for the selected quota - 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 only for one quota for each survey.

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

Quota balancing operations are performed for each survey in the following sequence:

- the Quota balancing procedure calculates percentage of fullness for each cell of the balanced quota. This way It identifies the quota cells with the lowest and highest achieved figures.
- then it detects all cells with a value which differs from the highest achieved value for more than a Threshold. And randomly selects from them the certain amount (this amount is predefined by the system) of the lowest filled cells - note that not necessarily ALL quota cells with the number of calls below the threshold will receive the additional calls.
- next 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 would be equal .
- finally it tries to promote a proper number of calls for each chosen quota cell while applying the following settings:
    - it chooses calls to promote using the value provided in the Filter field;
    - it sets a new Priority value for each chosen call (to promote calls into Active list to generate more dialing activity for calls which fit into specific quota cell).
- For each promoted call the Quota balancing procedure writes a corresponding record to the Quota Promotion History list (see Viewing the quota promotion history on page 89).

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

To set up, or to edit Quota Balancing for a particular quota:

1. In the Survey list select a survey for which you want to set up quota balancing. Make sure the survey is open - if not, open it (see Opening and closing a survey on page 61 for instructions).
2. Open the survey properties in the View mode and change to the General tab (see Viewing and modifying general properties of a survey on page 63).

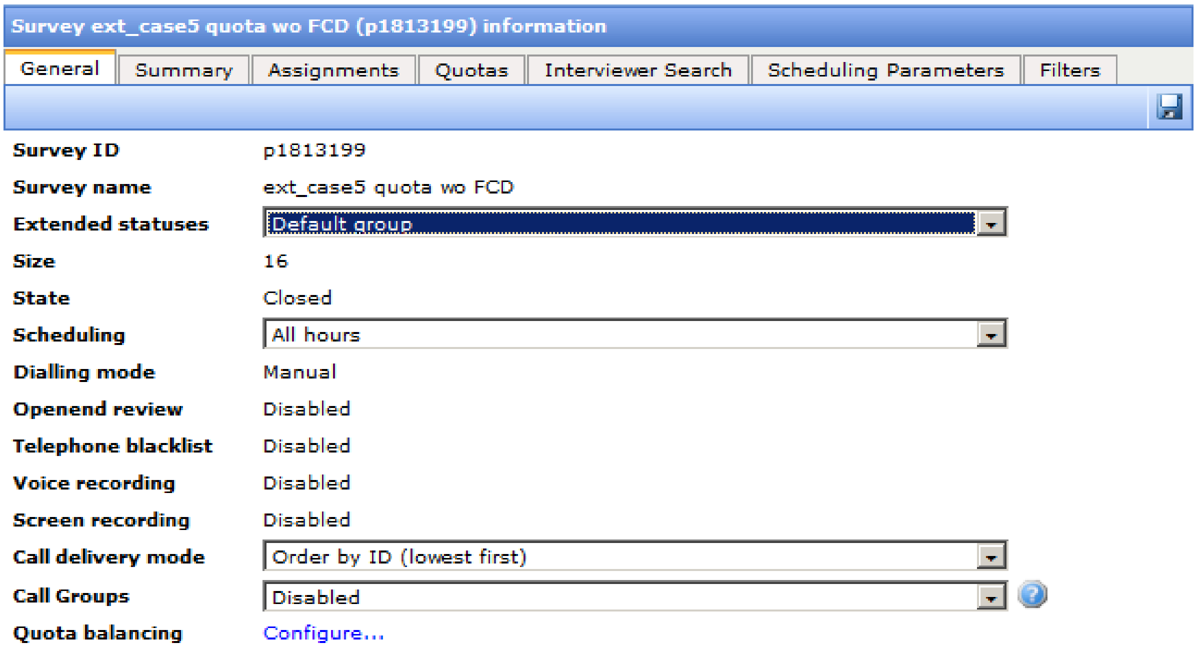


Figure 90 Choosing the Configure link for the Quota Balancing option

If quota(s) is available for the survey you will notice that the Quota Balancing option appears on the General tab. It contains the Configure.. link beside it (like in the picture above). If no quota(s) is available for that survey, the General tab of the Survey information view will not contain the Quota Balancing option at all.

If the Quota Balancing option contains only the Configure.. link, it means the quota for balancing was not selected, and you can set up the balancing parameters. 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 completely clear them (see the next steps for instructions).

3. Choose the Configure.. link beside the Quota Balancing option. This will display the Quota balancing parameters dialog window.

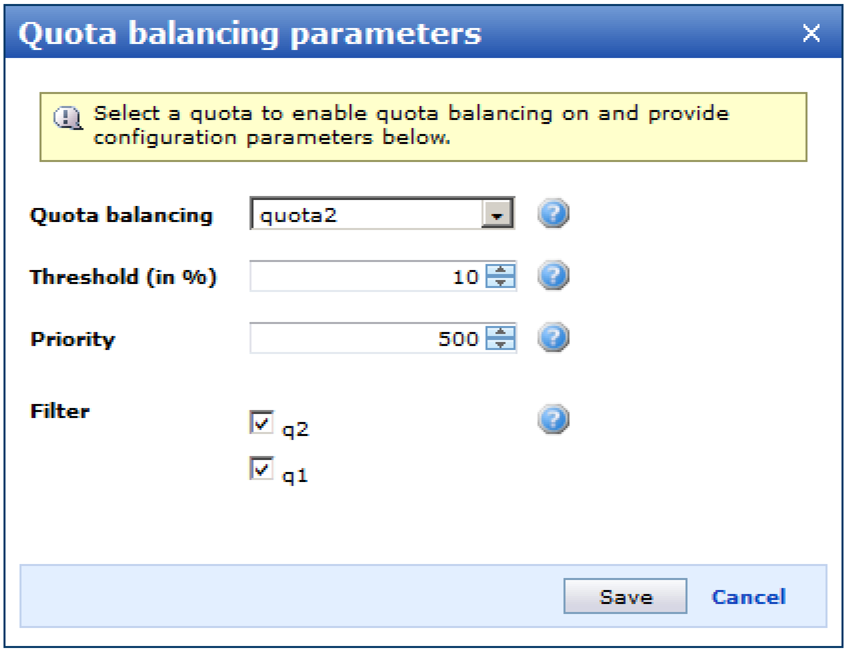


Figure 91 Specifying the Quota Balancing settings

Configure the quota balancing parameters:

- Select the Quota Balancing from the drop-down list. Remember that only one quota can be selected for balancing for each survey;
- Enter the Threshold value - this value will be used to detect quota cells that require additional calls; this is the case with quota cells which have amount of calls below this threshold (you can use the spin box controls to adjust the value);
- Enter the Priority value - this value will be assigned to the calls that will be promoted to the quota cells with deficiency of calls (you can use the spin box controls to adjust the value). The default value is 500;
- Check the appropriate boxes to set up a Filter which will be applied to select matching records (calls) from those fitting into a specific quota cell. A Filter in the Quota Balancing parameters is a question (or a number of questions, if you choose more than one question) which this quota is based on. By checking a box in front of a question name you add it as a condition for the Quota Balancing Filter.

Press 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, like this (see the picture below).

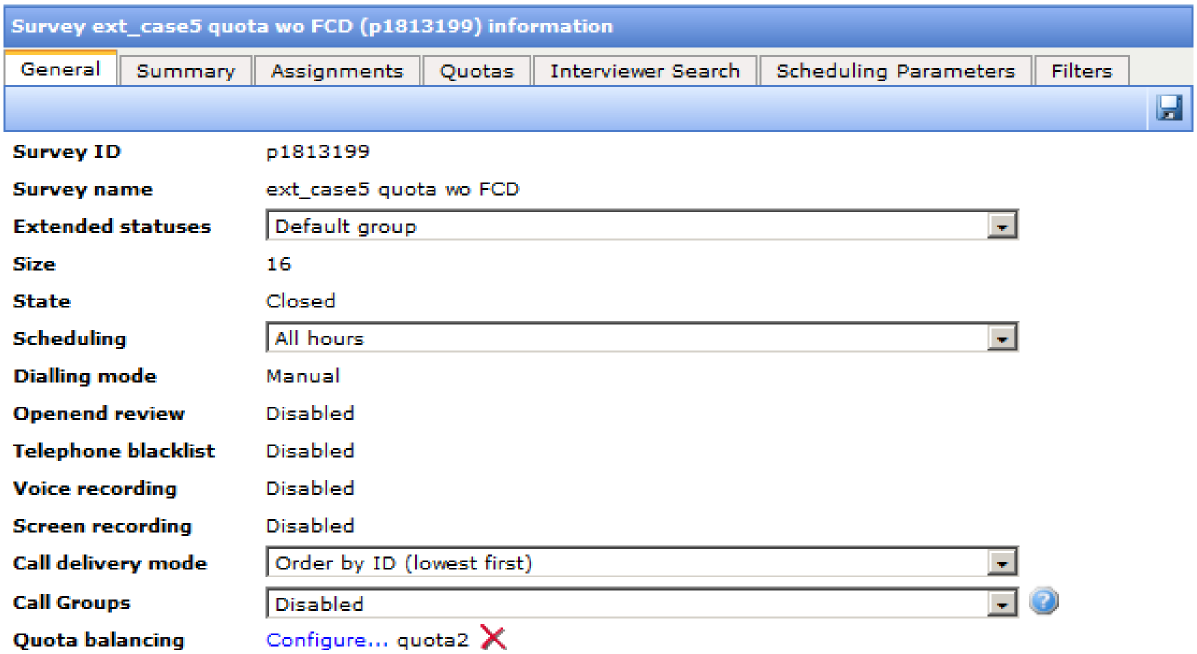


Figure 92 The General tab showing that Quota Balancing parameters are set

4. After the Quota Balancing parameters have been set, you can clear all these balancing parameters at once by pressing the Clear Balanced Quota button beside the Configure.. link and the balanced quota name (see the picture above).

   This action instantly clears all the balancing settings, including the name of the quota selected for balancing. The quota name and the Clear.. button will then disappear from the General tab.

You should press the Save button after you clear the Quota balancing parameters and before you leave the Survey information view, otherwise Quota balancing parameters are not cleared.

   To set up quota balancing once again you will have to configure the quota balancing parameters (see Step 3 of the present instruction).

Please note that the Quota Promotion History list is available for CATI surveys from a context menu on Surveys… tab (see Viewing the quota promotion history on page 89 for more information). This list contains information on how many calls were planned for promotion, and how many were actually promoted, promotion procedure date and time, 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 (refer to Quota balancing on page 86 for more information regarding quota balancing functionality). 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 less promoted calls than it was planned by the system. Then you may consider reconfiguring the quota balancing parameters, or changing the survey strategy in another way to maintain more complete filling of the quota cells - for example you may upload an extra sample containing records that fit the insufficiently filled quota cells.

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

The Quota Promotion History dialog windows allows selecting a time period and viewing 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 (see Viewing the survey list on page 59).
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.

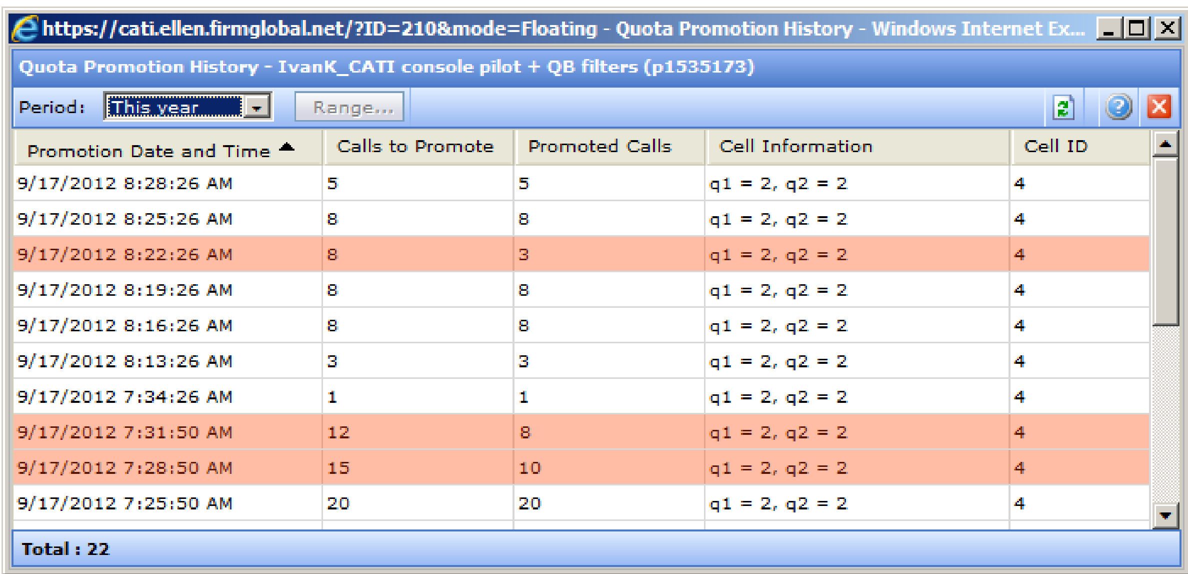


Figure 93 Viewing the quota promotion history

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:

- Promotion date and time - the timestamp of the promotion action;
- Calls to Promote - the amount of calls that were planned for promotion to the particular quota cell (forecast calculated by the system);
- Promoted 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);
- Cell Information - quota values which are set for this quota cell;
- Cell ID - ID of the cell.

3. Use the Period drop-down list to select the time period for which the quota promotion history would be shown. When the Range option is selected, the Range button to the right of this drop-down field becomes active. Press it to choose the particular time range, and the following form will be displayed below the button.

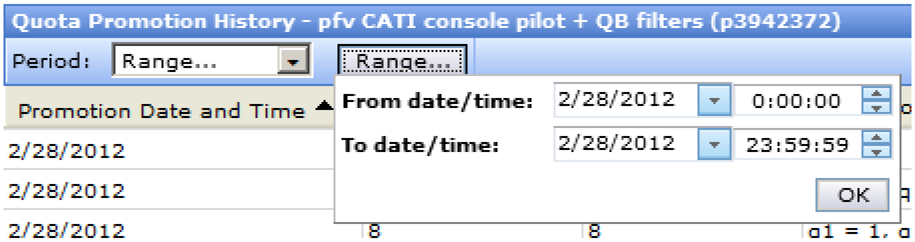


Figure 94 Choosing the particular time range to show the quota promotion history for

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 - press the arrow button beside the date to display the calendar form.

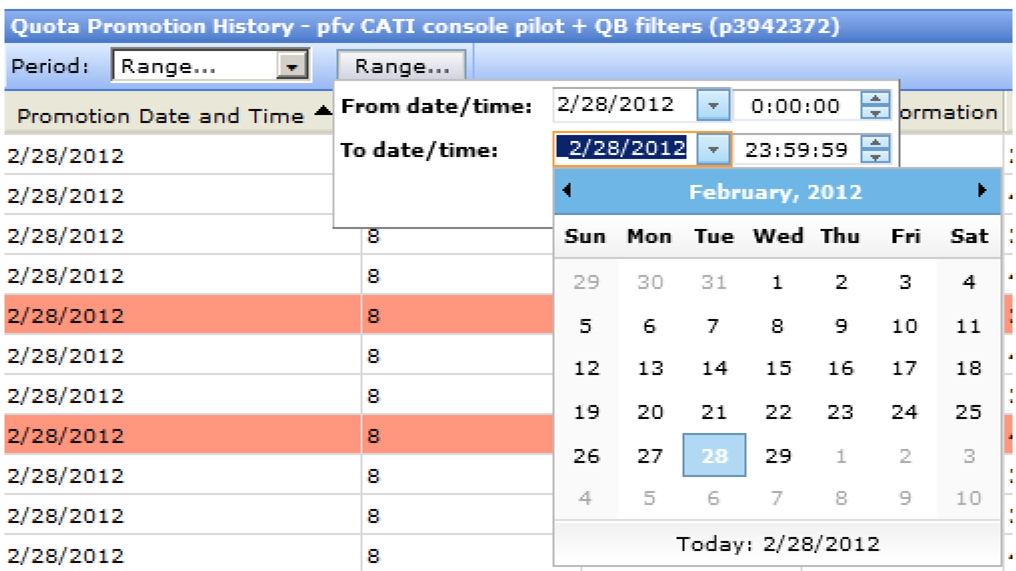


Figure 95 Choosing the date with the help of the calendar form

Using this 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;

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

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

4. When the time range is selected you should press the Refresh button on the dialog window toolbar. This will update the quota promotion list and show all promotion actions logged during the selected period.
5. You may notice that some promotion actions are highlighted in red. This means that the actual amount of calls promoted to this cell was lower than the planned amount. 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.

Remember that only quotas that have the “Display Quota in CATI Supervisor” setting enabled in Confirmit Authoring are available for clustering (please 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 (see Selecting a Survey/Interview on page 248 for details on interviewer working modes).

Please also be aware that quota clustering cannot be enabled when predictive dialing mode is enabled (please refer to the Dialer on page 341 for information on dial modes), or when call groups are used (please see Configuring the Call Groups on page 333 for details).

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).

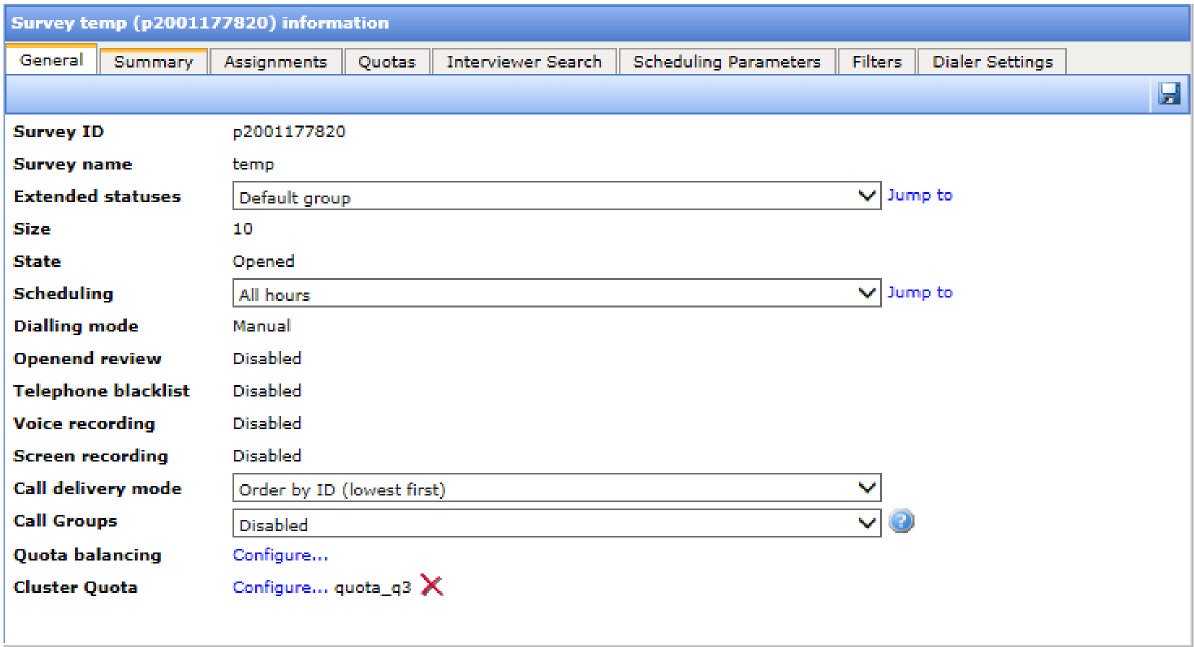


Figure 96 Quota clustering settings on the General tab in survey View mode

Check if the Cluster Quota option is available. If it is not - check the corresponding setting in Confirmit Authoring.

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).

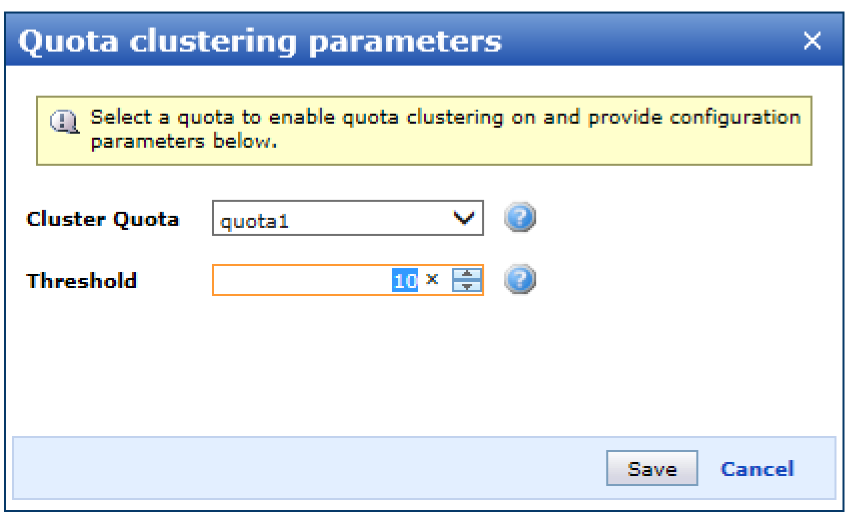


Figure 97 Configuring the Quota clustering parameters

6. Choose the quota to apply clustering setings 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. Press Save when you are done. The Cluster Quota will be displayed on the General tab (Survey View mode) next to the Configure... link (see Quota clustering settings on the General tab in survey View mode on page 93).
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. Press 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 Quota clustering settings on the General tab in survey View mode on page 93 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. Press 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;
- 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 instantly 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 dialog window that opens explains what kind of information is included into Quota Status report. Press 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

The Supervisor 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 (see Manual Selection mode on page 251 for more information on the interview list). Questions selected by the supervisor become available for the interviewer when he/she works in the Manual interview selection mode (see Manual Selection mode on page 251).

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

Note that this is possible only for the questions which are marked as "Available as CATI filter". Questions can be marked as "Available as CATI filter" in Confirmit Authoring, please 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 (please refer to Manual Selection mode on page 251 for description of the Interviewer Console interface).

To add searchable questions to the interview

1. Mark all the required questions as "Available as CATI filter" in Confirmit Authoring (please 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 (see Viewing and modifying general properties of a survey on page 63).
3. Change to the Interviewer Search tab.

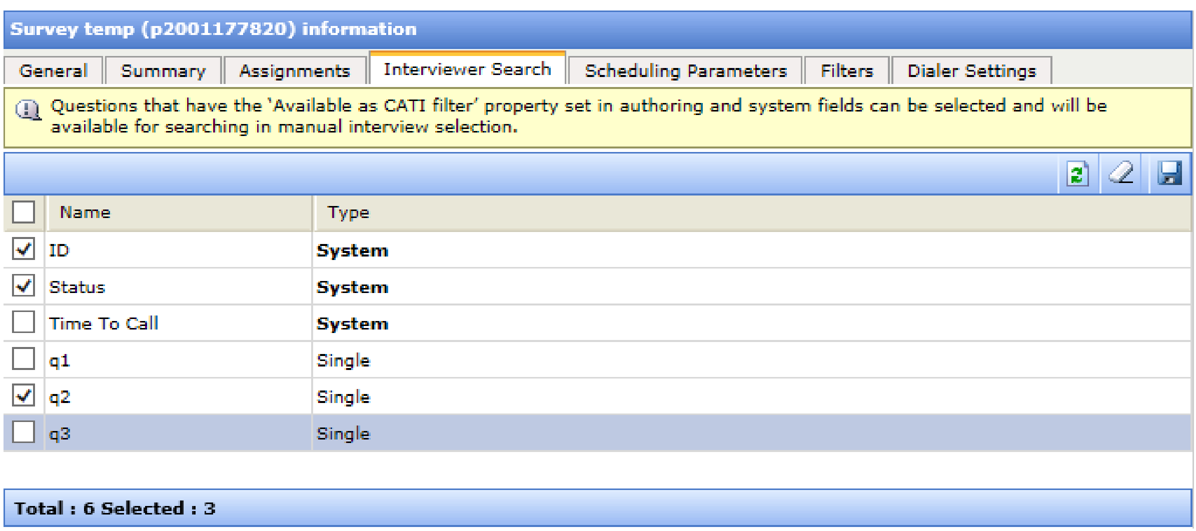


Figure 98 Viewing the Interviewer Search tab contents

4. Select the required questions in the list by checking the box in front of the question name. Mind that only a selected question will be added to the interview parameter set and shown in the interview list in the CATI Interviewer Console.

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 Parameterized scheduling scripts on page 218 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 Parameterized scheduling scripts on page 218

To edit scheduling script parameters for the current survey:

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 View from the shortcut menu, or press the View button on the toolbar. This will display the survey properties in the bottom right frame of the browser window.

   Change to the Scheduling Parameters tab.

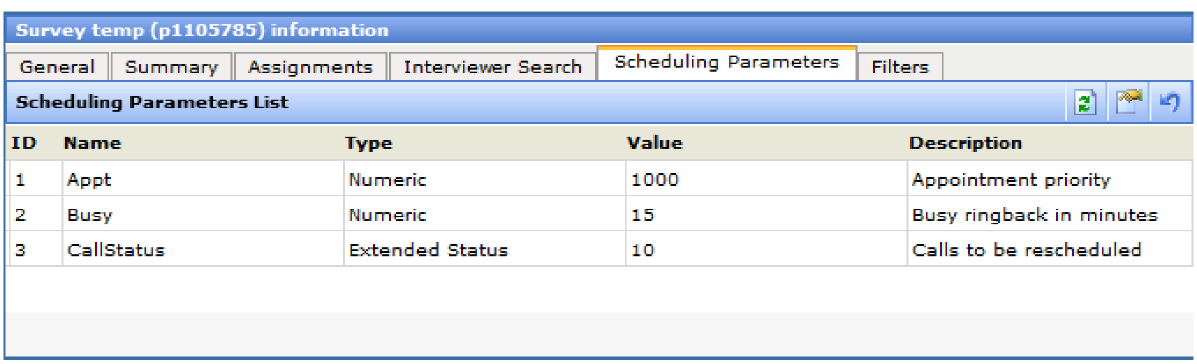


Figure 99 Viewing the parameter settings of the scheduling script currently used with the survey

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

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

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

   This will display the Edit dialog.

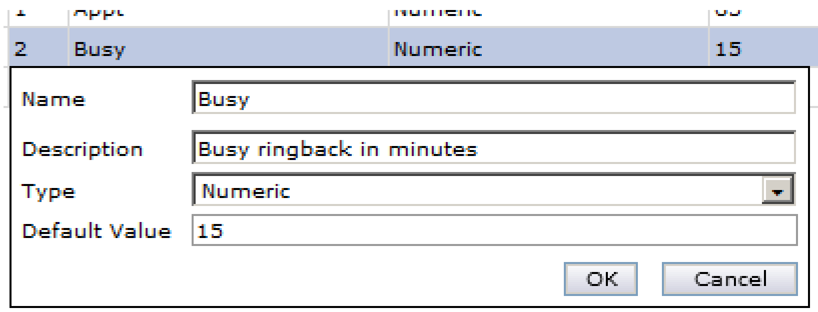


Figure 100 Editing scheduling script parameter from the Scheduling Parameters tab

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

4. Edit value in any field as required, and press OK to save the new values, or press 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. Press 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 Parameterized scheduling scripts on page 218 for explanation).

Mind that you cannot change the default parameter value itself from the Scheduling Parameters tab - here you can only specify another value to use with the current survey. All default parameter values can only be set using the Parameters tab of the scheduling script view (see Parameterized scheduling scripts on page 218 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 the TCI or Pro-T-S 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 (for dialers of the TCI and Pro-T-S types):

1. Display the Survey Information view for the required survey in the right bottom frame (see Viewing and modifying general properties of a survey on page 63).
2. Change to the Dialer settings tab.

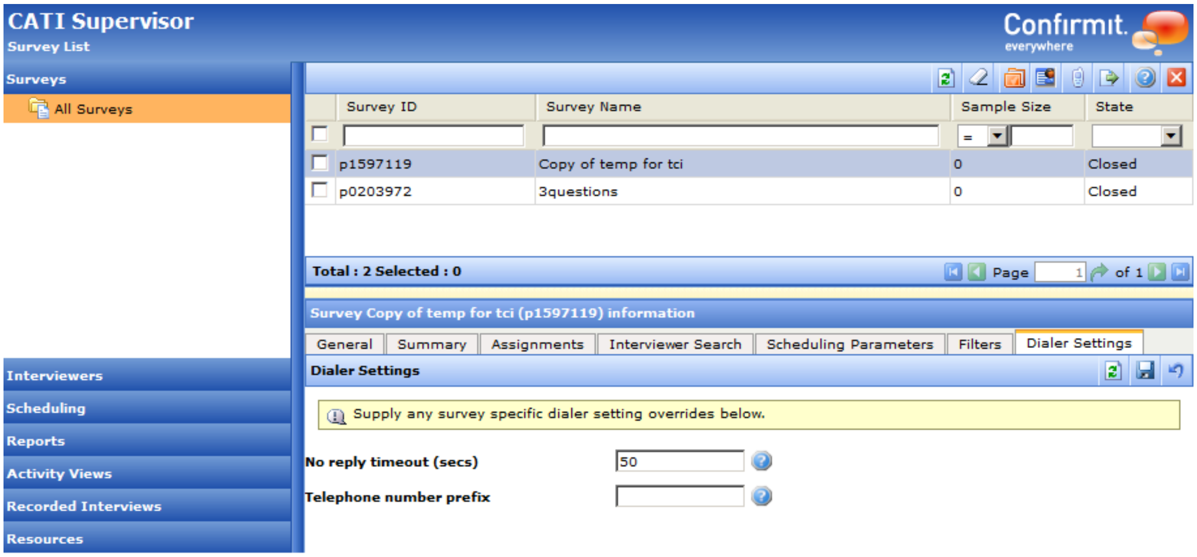


Figure 101 Configuring the survey related dialer settings for the TCI dialer

The following settings are available for the company which uses the dialer of the TCI type:

- No reply timeout - this is the timeout period (in seconds) that the dialer will wait until the call attempt is considered as a "no reply";
- Telephone number prefix - this is a string that is added to the start of every telephone number before it is dialed by the dialer. This prefix is not added to the telephone number stored in the survey data

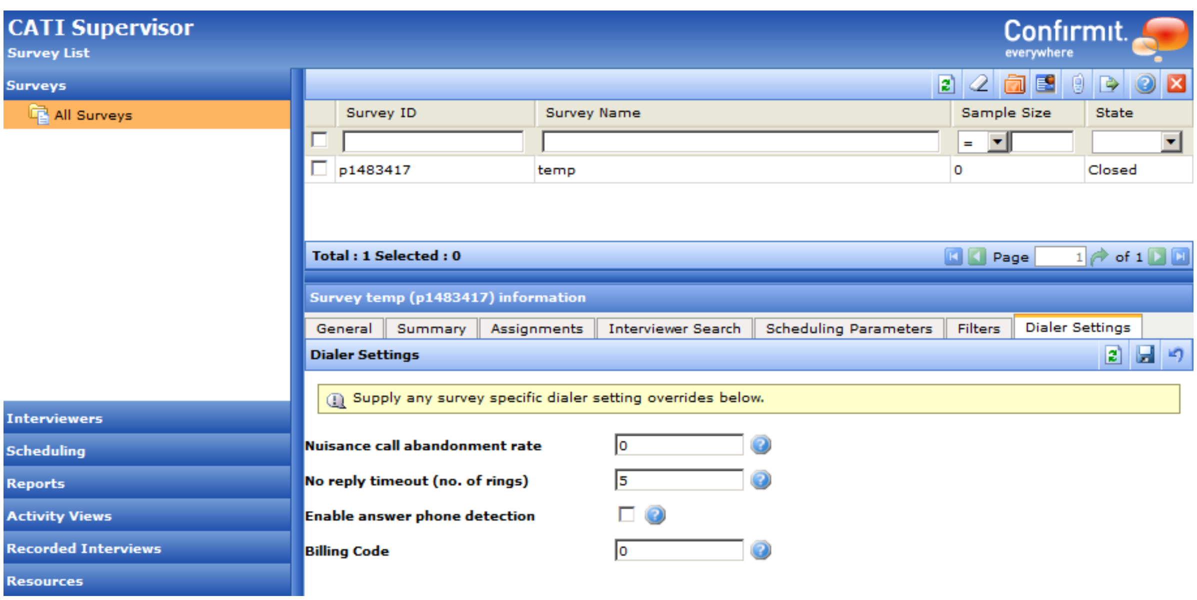


Figure 102 Configuring the survey related dialer settings for the Pro-T-S dialer

For the company which uses the dialer of the Pro-T-S type the following settings are available:

- 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 supplied value 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:
  - 0 - 1 in 10,000 (.01%)
  - 5 - 5 in 1,000 (.5%)
  - 10 - 10 in 1,000 (1%)
  - 20 - 20 in 1,000 (2%)
  - 30 - 30 in 1,000 (3%)
  - 40 - 40 in 1,000 (4%)
  - 50 - 50 in 1,000 (5%)
  - 60 - 60 in 1,000 (6%)
  - 70 - 70 in 1,000 (7%)
  - 80 - 80 in 1,000 (8%)
  - 90 - 90 in 1,000 (9%)
  - 100 - 100 in 1,000 (10%)
- No reply timeout - the number of rings that should be performed by the dialer;
- 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.

  Enter the required value(s) in each field (all fields are optional).

4. 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 Connecting, configuring and disconnecting the Dialer on page 345 for information).
5. Press the Save button on the bottom right frame toolbar to save the dialer settings.

3.4 Creating and modifying filters

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

The user can create filters using conditions which help to define sub-groups of calls. This provides the possibility of applying operations to a specified sub-group of items only.

Available filters are displayed in the grid on the Filters tab (the Survey settings view) – each grid row contains parameter values pertaining to a certain filter.

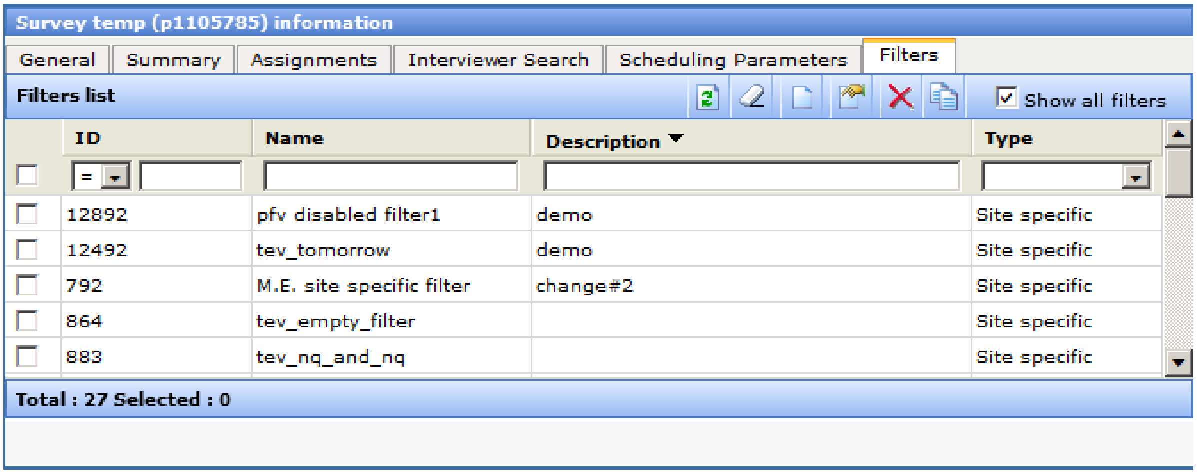


Figure 103 Survey properties - Filters tab

The user can manage the list of filters using controls available on the Filters tab. 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 FILTER	Allows adding a new filter to the list. Displays the Filter Properties dialog window
	FILTER 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 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 press the View button on the toolbar.

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

Change to the Filters tab to view the filter list.

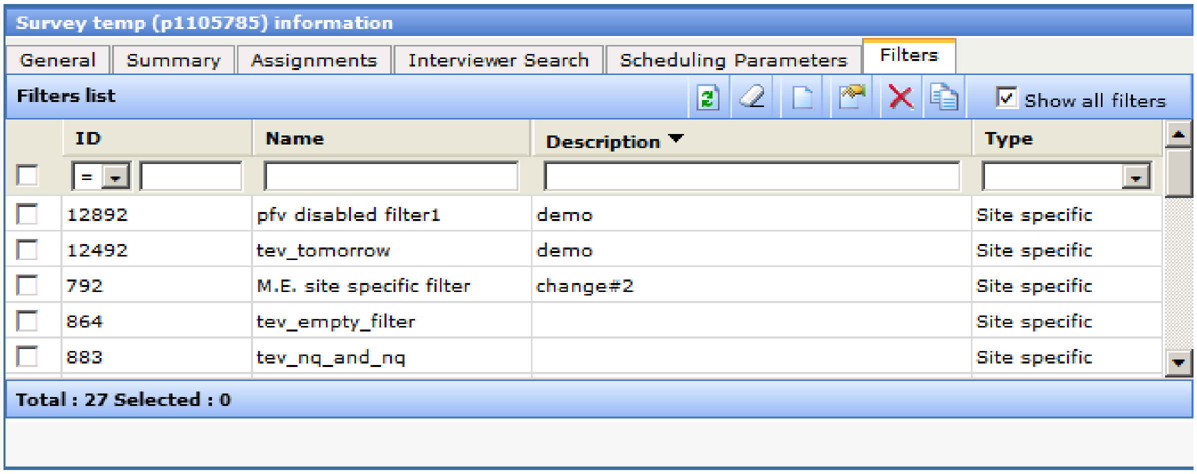


Figure 104 Survey properties - Filters tab

2. The Filters tab presents the 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 press the Refresh button .

3.4.2 Creating a new 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 press 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 Filters tab to view the filter list.

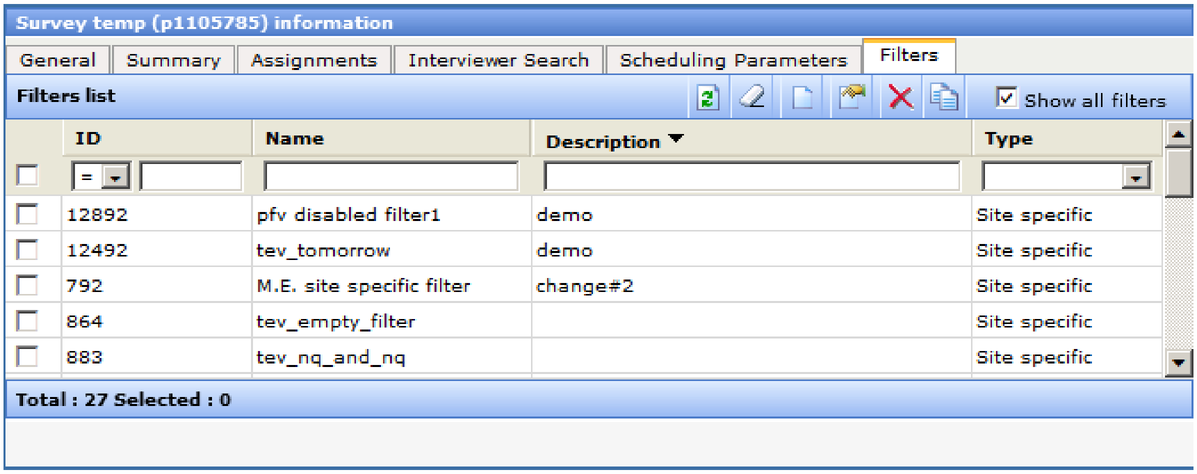


Figure 105 Survey properties - Filters tab

3. Press the Add filter button located above the grid or right-click anywhere inside the grid and choose Add filter from the shortcut menu. This will display the Filter properties dialog window.

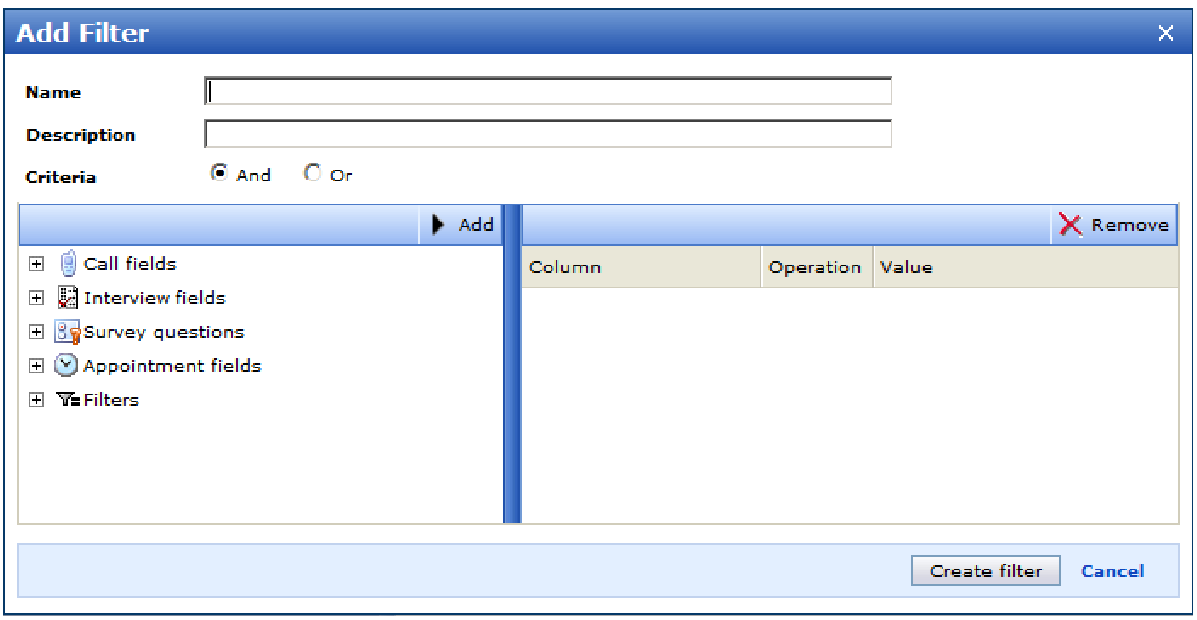


Figure 106 The Filter dialog window (empty)

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 the 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 bottom of 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 branches containing variable types. Clicking a plus sign in front of a branch name unfolds a list of variables of a certain type.

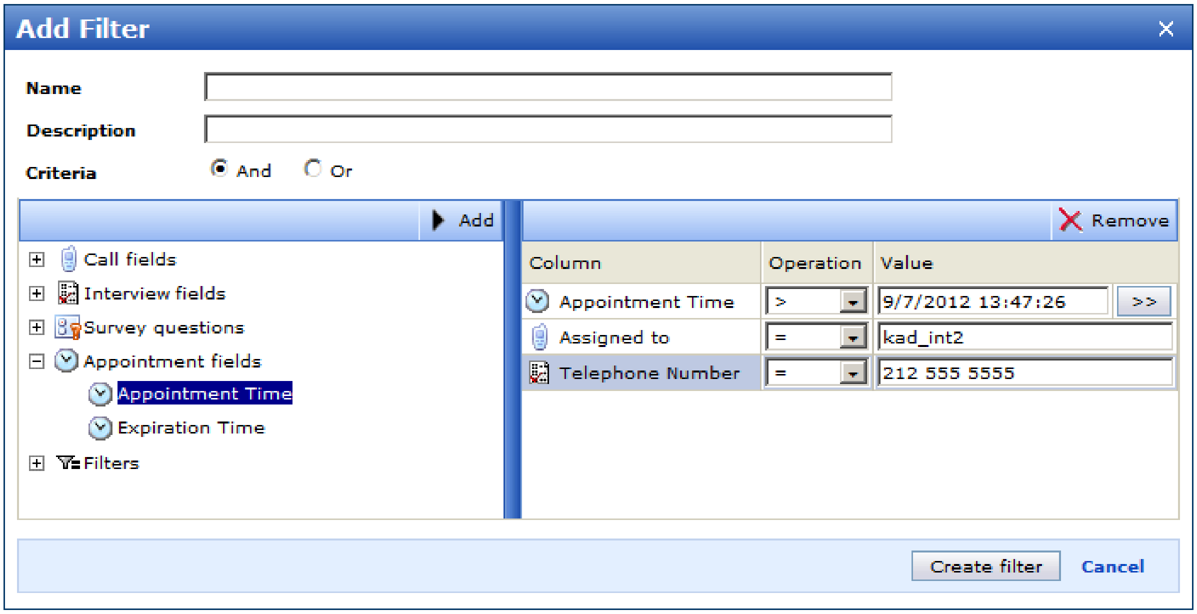
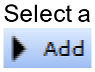


Figure 107 The Filter dialog window containing filter parameters

Select a variable (you can select only one variable at a time) in the left frame and press the Add button 

to create a condition based on this variable (data column).

The selected variable (data column) name is then displayed in the “Column” column in the grid in the right frame. To complete a condition you should select the required operator from the drop-down box in the Operation column and next 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 double arrow button. Press this button to display the Date/Time dialog.

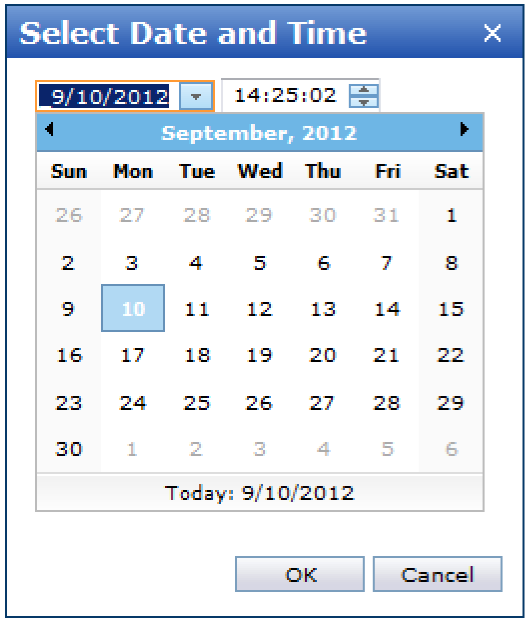


Figure 108 The Date/Time dialog window

This dialog allows the required date and time to be entered. By default the dialog window displays the current system date (in the upper left field) and the current system time (in the upper right spinbox).

Press an arrow button besides the Date field to unfold the Calendar form, if it is not already shown.

This dialog window contains the calendar with browsing controls.

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.

Next you can set up the required time in the Time field using a clock with the spin controls:

- Set the required time in the upper right spinbox by pressing the up or down arrows (click the Hours or Minutes section in the spinbox to change, respectively, only hours, or only minutes when pressing up and down arrows).

The selected date and time will be used as the condition value when you press OK in the Date dialog window.

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. Finally press Create filter button to create a filter. The created filter will appear in the filter list.

3.4.3 Viewing the filter properties, modifying a filter

The user can view the properties of any created filter. The same view operation also provides the user with the possibility of modifying this filter's properties.

Filter properties are modified using the same Filter properties dialog window, which was used to create the filter.

To modify the filter properties:

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 press the View button on the toolbar.

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

   Change to the Filters tab to view the filter list.

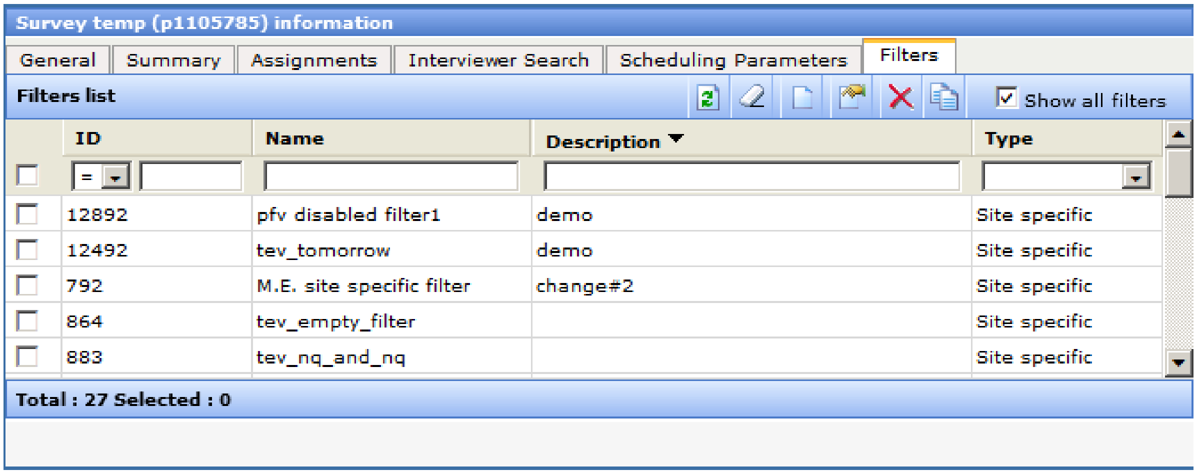


Figure 109 Survey properties - Filters tab

2. Select the required filter in the list and press the Filter properties button located above the grid, or right-click the required filter and choose Filter properties from the shortcut menu. This will display the Filter properties dialog window.

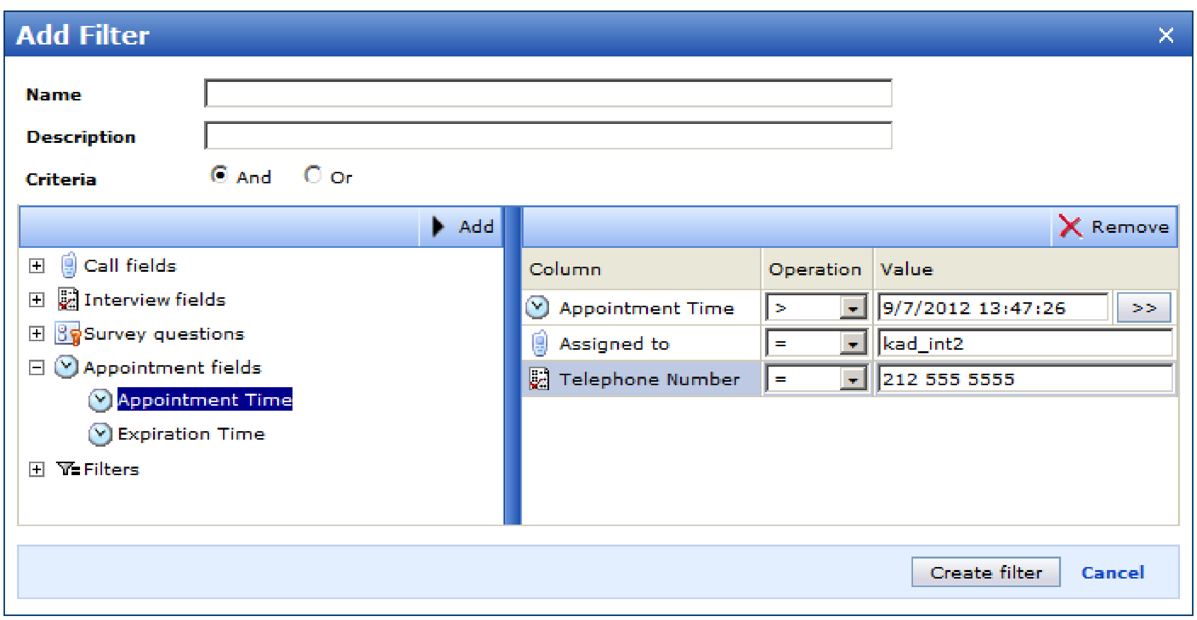


Figure 110 The Filter dialog window containing filter parameters

3. The process of filter parameters configuration is described in more detail in Creating a new filter on page 101. Refer to this description for instructions on modifying the filter properties.

3.4.3.1 Copying and moving a filter from another survey

Survey specific filters that were once created for one survey can later be re-used in another survey. To accomplish this, you can copy (or move) filters already existing in one survey to the selected survey.

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

Also 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 filters from the selected survey:

1. Select the required survey (the one that will be used as "destination" survey for copying/moving of the variables from the "source" survey) in the Survey list (top right frame).
2. Open the survey in the View mode and change to the Filter tab (see Viewing the filter properties, modifying a filter on page 104 for instructions).
3. Press the Copy/Move filters from survey... button . This will display the Copy/Move filters from survey dialog window.

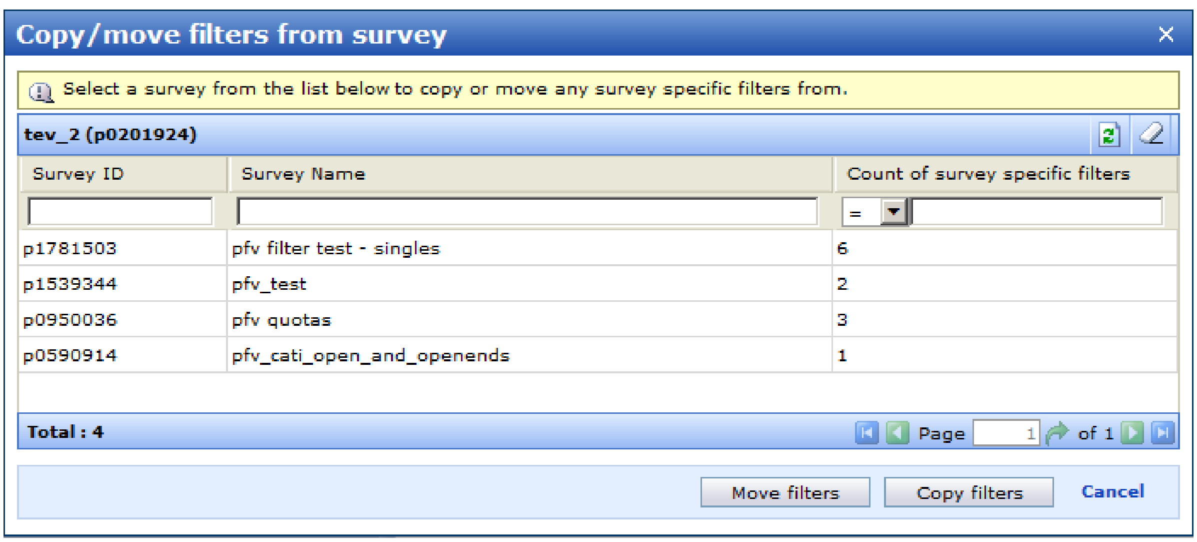


Figure 111 Copying or moving filters from the selected survey to the current survey

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 press 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.

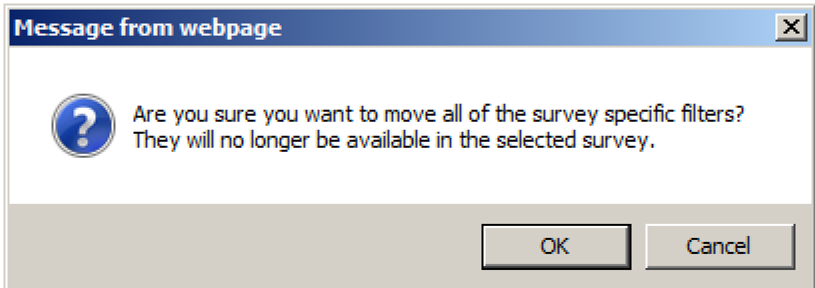


Figure 112 Confirming the Move Filters operation

Press 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 a filter

Any created 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 a 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 press 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 Filters tab to view the filter list.
3. Select the required filter in the list and press the Delete button located above the grid, 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.

3.4.5 Viewing distribution of dialer calls

The supervisor can view how many calls were allocated for delivery to interviewers at certain moments. This feature is available only for surveys that are run in the "Predictive" mode (setting which is chosen in the Confirmit Authoring module, please refer to the Confirmit Authoring User Guide for information).

This information is available only when there are interviewers logged in and working in the Interviewer Console.

"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 (see Call Management on page 109).

Information about distribution of dialer calls is displayed in a separate window as a table. Each table row corresponds to a single interviewer or interviewer group and the topmost row shows combined figures. All table rows are named accordingly (see the picture below).

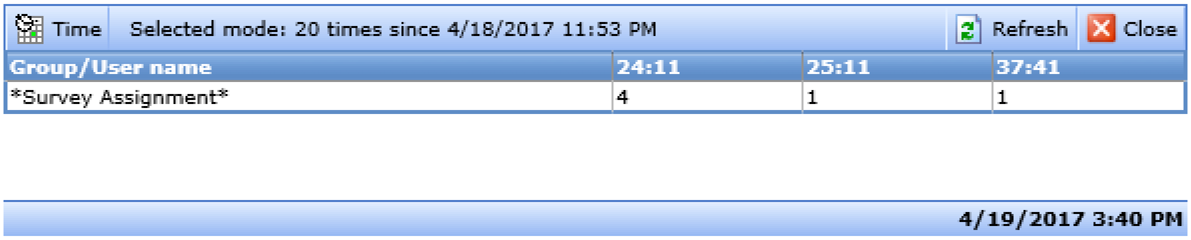


Figure 113 Viewing distribution of dialer calls

This view shows how many active calls were registered by the time displayed in each table column.

The analyzed time period is 20 minutes. Supervisor can specify the start time to count this 20 minutes from, or he can choose to view distribution for the last 20 minutes.

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.
3. By default the analyzed time period is set to 20 last minutes. To specify another start time for analysis press the Time button Time on the toolbar. This will display the dialog using which you can choose the start time.

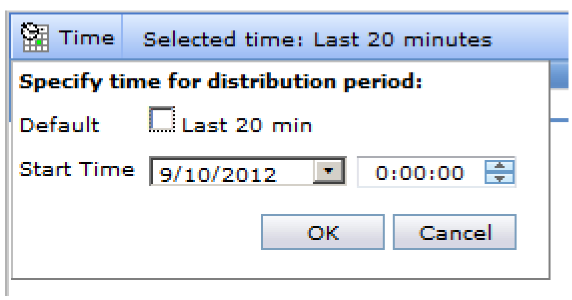


Figure 114 Specifying the start time for viewing active call distribution

4. To use the default setting, leave the Default box checked (the Last 20 min 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.

Remember that whatever start time is chosen, the analyzed period always equals 20 minutes, which are counted forward from the specified start time. In case the Last 20 minutes view is selected, the 20 minute period is counted backwards from the current time.

5. In case you have chosen to view distribution of dialer calls for the last 20 minutes, you can periodically refresh the view by pressing the Refresh button Refresh on the toolbar.

3.5 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 kind of a single "business object" with a certain life cycle. Most of the times in CATI the term "interview" is used in pair with the term "call". In fact these are different objects, although they always go in pair, and sometimes can be seen (and perceived) as a single entity. While the first serves as a starting point for the second, the second one cannot exist without the first. An "interview" forms a basis for a "call", and a "call" simply cannot be created when there is no corresponding "interview".

All operations with interviews/calls are started in the Call Management dialog window.

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 Reviewing interviews with the Reviewer application module on page 149);
- Assign/deassign interviewers to surveys and vice versa (see Survey assignments on page 171).

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

3.5.1 Viewing the interview/call list

The Supervisor 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 in the top left corner of the window toolbar.

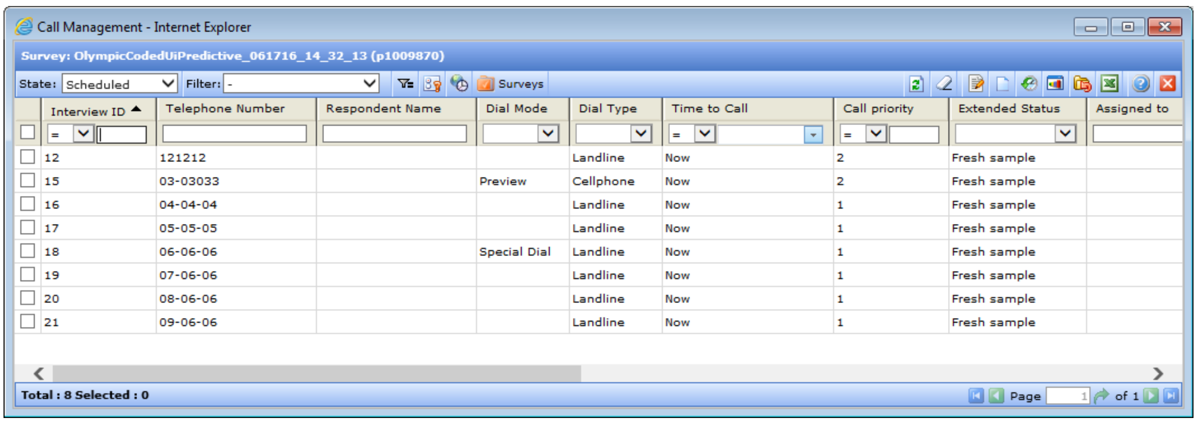
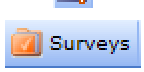


Figure 115 The Call Management dialog window

By default the list displays only calls in the “Scheduled” state (the state can be selected in the State drop-down list above the grid). Available options are described in the instruction given below.

The following controls are available for displaying data in the interview/call list:

Control element	Name	Function
Drop-down list	State	Displays interviews/calls in the currently chosen state whilst hiding the rest
Drop-down list	Filter	Allows selecting an expression for filtering the displayed interviews/calls
	History	Allows viewing a list of calls that were ever scheduled and conducted (through the CATI Interviewer Console) for the current interview.
	Interview history	Allows viewing captured data regarding certain interview questions which are contained in the special loop called "callhistoryinfo"
	Show Time in Respondent time zone	Toggle button. When enabled displays time considering the respondent time zone.
	Add filter	Allows creation of a new filter that will be available from the Filter drop-down list.
	Add question	Adds variable columns to the interview/call list.
	Surveys	Displays the Select Survey dialog. This allows instantly choosing 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
Active calls	Displays the Active Calls window showing 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 dialog window.

Also the total amount and the number of selected interviews/calls are displayed in the bottom 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 press the Call management button on the toolbar.

   This will display the Call Management dialog window.

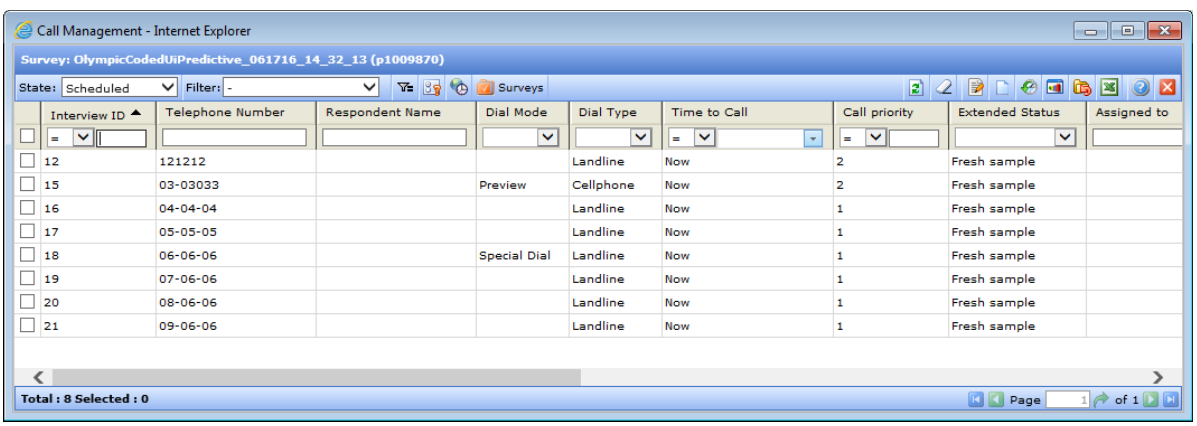


Figure 116 The Call Management dialog window

2. The list in this dialog window displays properties of the interviews/calls in the selected state.

   There are four types of interview/call states, and an option to display 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 State 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 moment by the interviewer are not shown in the Call Management window at all - these calls can be viewed by means of the Interviewer Activity List window (Activity Views tab - see Monitoring interviewers and their work on page 297 for instructions).

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. Please refer to Disabling and enabling calls on page 120 for more information on disabling and enabling calls.

3. Property sets displayed in the grid depend on the chosen state. 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 Disabling and enabling calls on page 120 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.
   - *Selected for review* – indicates whether a review session has been created for this interview (see for details). 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 not ever 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 the 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.

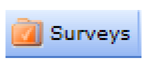
4. To update the interview/call list you should press the Refresh button  on the toolbar.

Note: Remember that you can use the search facility to find an interview/call by certain properties. Each column has a field right below the column heading. Values can be entered in the fields under the column headings to filter the current list. The asterisk symbol * may be used as a wildcard where you don't to match the entire string value e.g. entering *321 in the telephone number column would return a list of all records where the number contains 123. To apply an exact match filter you may enclose the search string in double quotes e.g. "1" to filter on empty values you can also enter two adjacent double quotes like this "".

3.5.2 Changing survey in Call Management

Supervisor can instantly 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. Press the Surveys button 

in the Call Management window toolbar. This will display the Select Survey window.

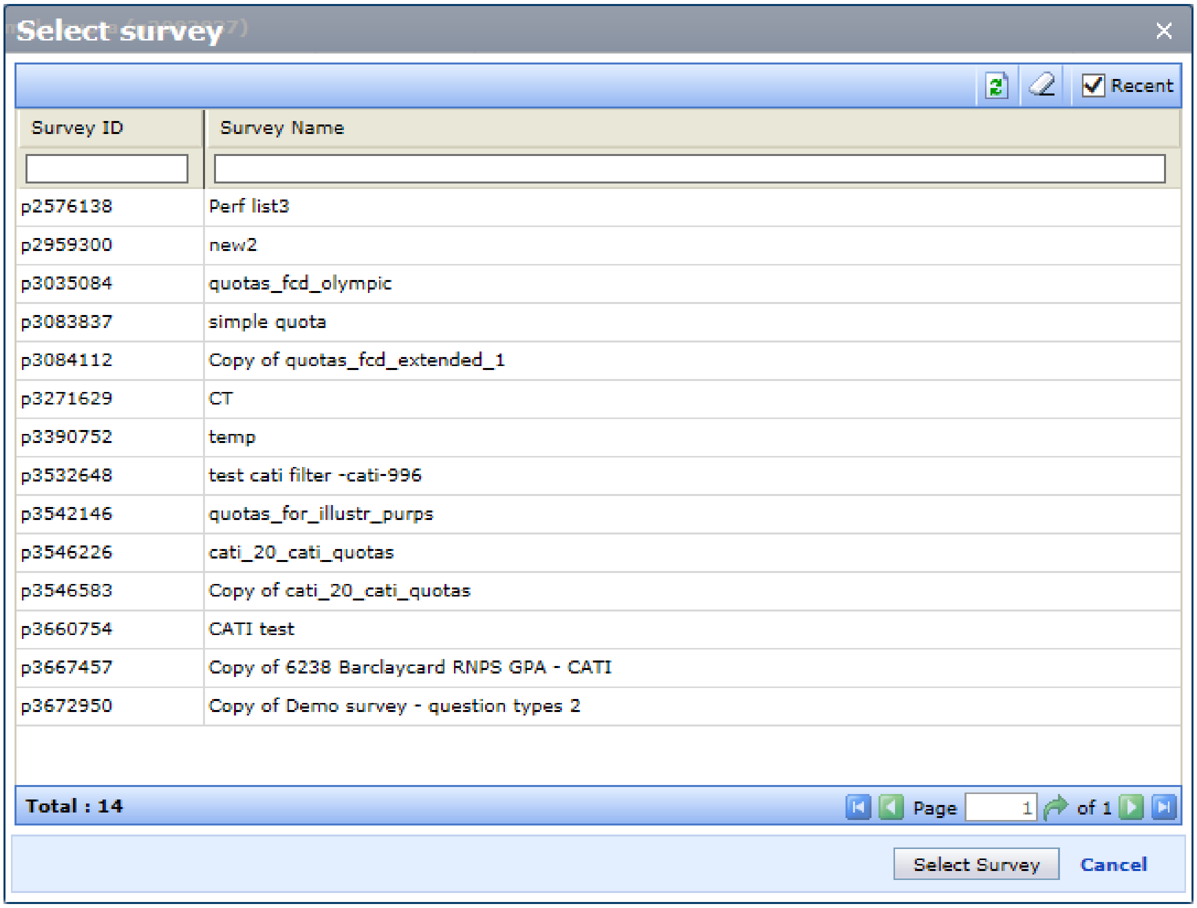


Figure 117

2. Select a survey by clicking on its name. Then press 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 It should be taken into account that any survey can be used with different call centers and thus may have it's interviews change their extended status in one call center while it retains the same value in another call center. Please mind that in such case the change of the extended status is sensed only in the call center where it took place - in other call centers that use this survey such a change will not be applied, and the survey containing such interview will not be treated as "recent".

3.5.3 Viewing the extended interview/call history

Interview history provides you with detailed list of all actions and operations that were ever performed with the current interview. The Interview History dialog window contains two tabs. The "Call Attempts" tab gives you access to the basic information regarding all the call attempts made, while the "Extended Call History" tab displays the list of all operations which involved changing the call/interview properties.

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 (the moment when 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 - press 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 (see Viewing the interview/call list on page 110 for instructions).
2. Select an interview or a call in the Interview/Call list and press the History button on the toolbar.

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

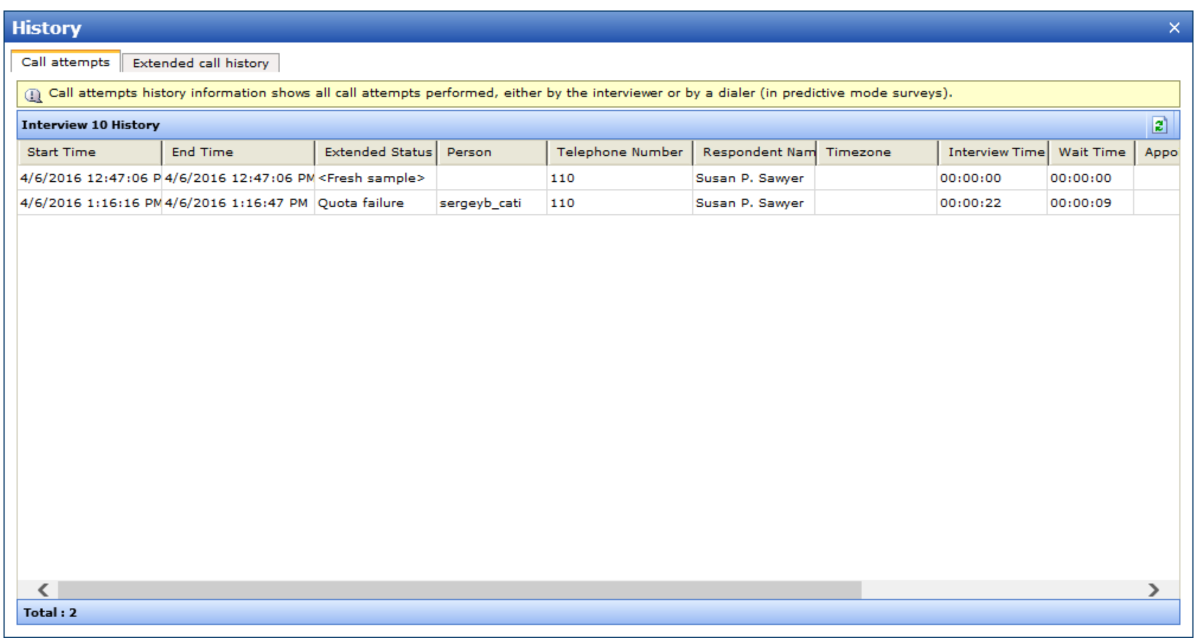


Figure 118 The Interview History dialog window with Call Attempts tab displayed

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 press 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 - please 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 Viewing the interview/call list on page 110 for instructions).
2. Press 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 interview.

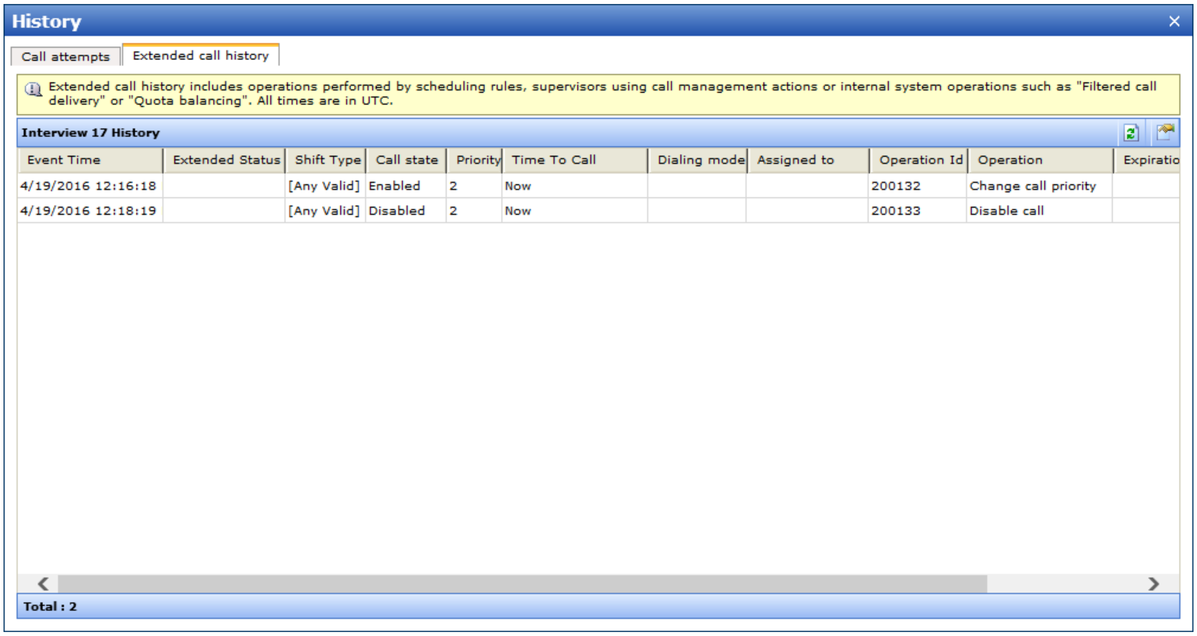


Figure 119 The Interview History dialog window with the Extended Call History tab displayed

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 you should select the required operation and press the Operation Details button  in the toolbar above the table. This will display the dialog 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).

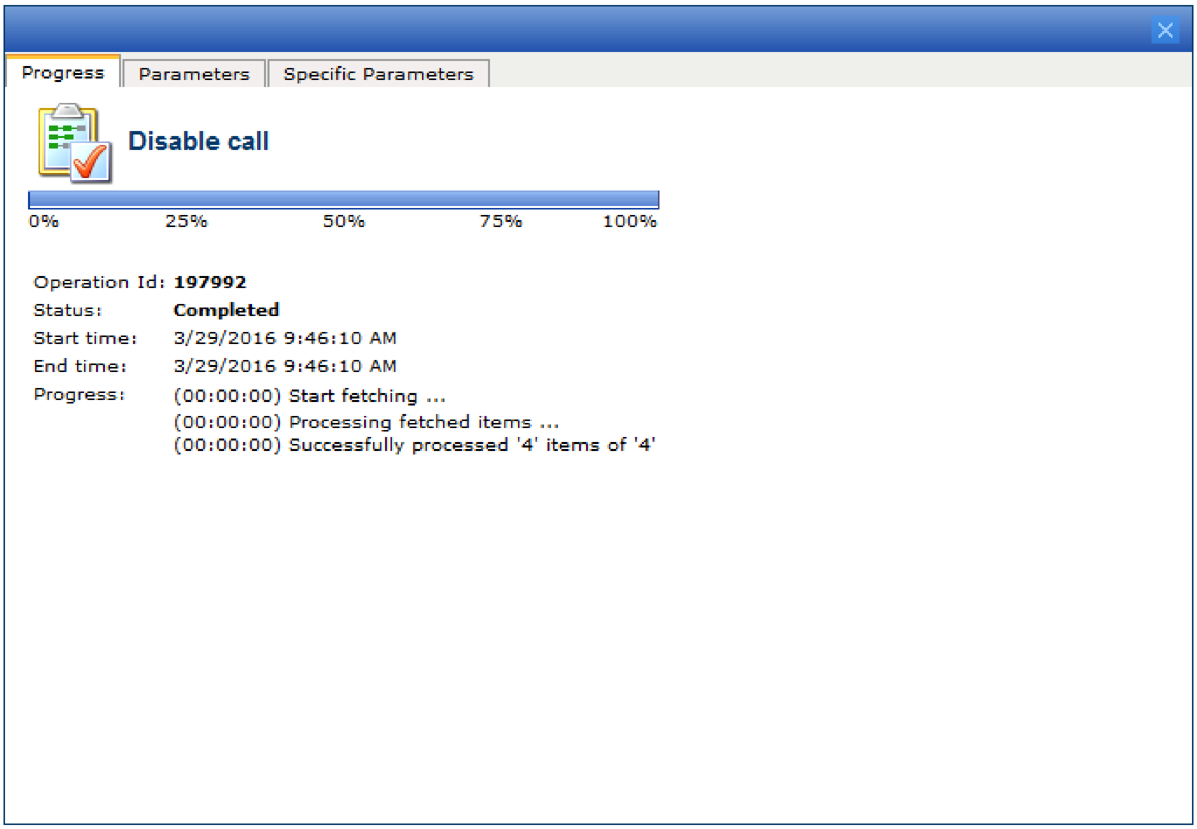


Figure 120 Operation details displayed in a dialog window

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

3.5.4 Viewing additional call history info

Supervisor can view 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.

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

To enable supervisor to retrieve and display this data CATI Supervisor module provides the Interview History facility. All the information contained in questions that were added to the "callhistoryinfo" loop will be displayed in the grid in a separate window after the supervisor presses the Interview History button in the Call Management window.

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), a 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 (see Viewing the interview/call list on page 110 for instructions).
2. Choose the interview type you need, then select the required interview in the grid and press the Interview History button  in the Call Management window toolbar.

   This will display the Interview History dialog window.

Figure 121 Viewing the additional call history info in the Interview History dialog window

3. Questions contained in the "callhistoryinfo" loop are presented as grid columns, and call attempts are presented as rows.
4. You can refresh the view periodically to update the captured data. Press the Refresh button on the toolbar to do this.
5. Note that if the survey has no "callhistoryinfo" loop, no loop data can be captured. Pressing the Interview History button in such case will display the Interview History window blank, containing only the warning message: Unable to display survey history loop data for the survey.
6. All captured data is shown as it is - it is not rendered in any way.

NOTE In case the "callhistoryinfo" loop includes a multi question all answer variants will be presented as separate columns with their names shown as column headers.

3.5.5 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, "identifies" interviews and maintains a queue of interviews which are most likely to be delivered next. Such "waiting" calls are considered as "active".

The supervisor can monitor the amount 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 they are assigned some calls.

To observe the amount of active calls

1. Display the Call Management window (see Viewing the interview/call list on page 110 for instructions).

   Choose the Active Calls button in the Call Management window toolbar. This will display the Active Calls window.

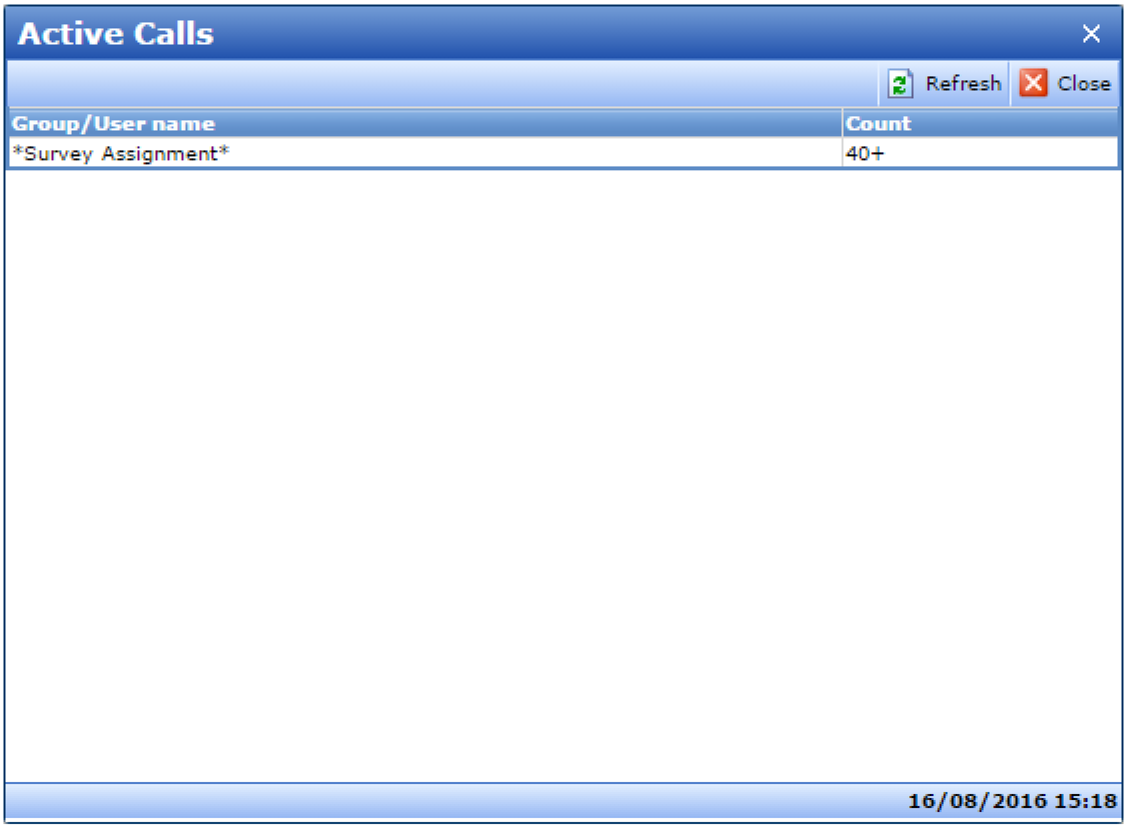


Figure 122 The Active Calls window

   The Active Calls window shown in the picture above tells us that for the group called "Survey Assignment" (shown in the Group/User name column) more than 40 interviews are ready and are waiting to be delivered (40+ figure shown in the Count column).

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

3.5.6 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.

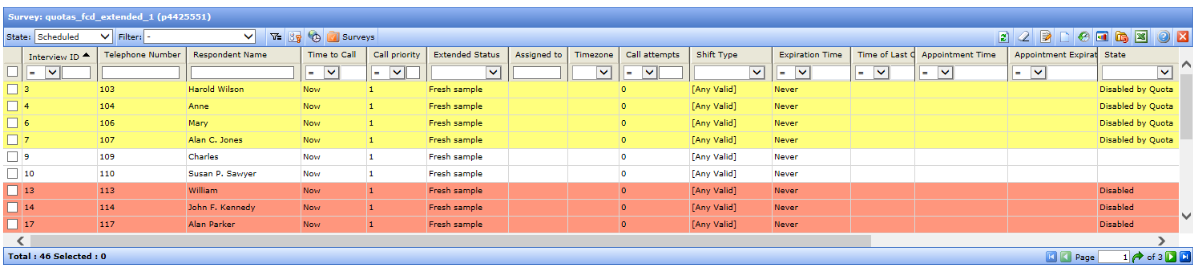


Figure 123 The Call Management window showing the disabled calls

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 (see Specifying scheduling script rules on page 214);
- 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 Disabling a call from a call list in the Call Management window on page 122 for instructions);
- with the help of the context menu command from the Quota tab in the Survey Properties view (see Viewing and modifying survey quota settings on page 70 for instructions).

A disabled call can be enabled:

- when an appropriate scheduling rule is applied to that call (see Specifying scheduling script rules on page 214);
- with the help of the context menu command in the Call Management window (see Enabling a call from a call list in the Call Management window on page 123 for instructions);
- with the help of the context menu command from the Quota tab in the Survey Properties view (see Viewing and modifying survey quota settings on page 70 for instructions);
- from the Activate Call dialog window (as part of the Activate Call operation - see Activating an interview/call on page 135 for details);
- from the Edit Call dialog window (as part of the Edit Call operation - see Editing a call on page 128 for details).

Disabling a call from a call list in the Call Management window

1. Display the Call Management window (see Viewing the interview/call list on page 110).
2. Choose the Scheduled view to display calls (see Viewing the interview/call list on page 110).
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).

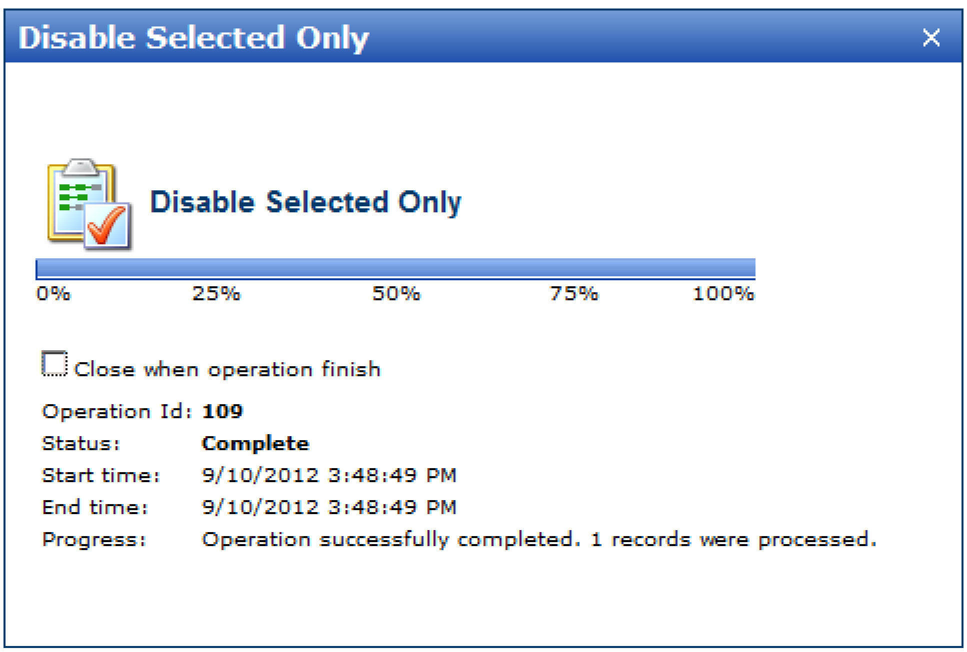


Figure 124 Disabling selected calls progress dialog

   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. Please refer to Activating an interview/call on page 135 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 Activating an interview/call on page 135.

Enabling a call from a call list in the Call Management window

1. Display the Call Management window (see Viewing the interview/call list on page 110).
2. Choose the Scheduled view to display calls (see Viewing the interview/call list on page 110).
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 submenu 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).

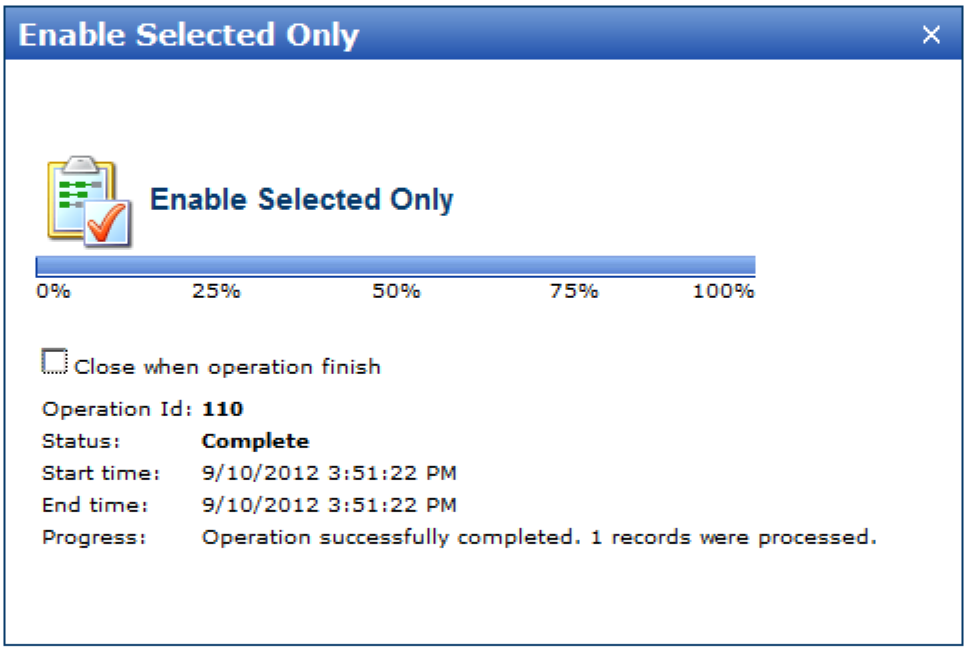


Figure 125 Enabling selected calls progress dialog

   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. Please refer to Activating an interview/call on page 135 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 Activating an interview/call on page 135.

3.5.7 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 – refer to Creating and modifying filters on page 99 for instructions on how to perform these operations.

3.5.7.1 *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).

3.5.7.2 *Creating a new filter in the Call Management dialog window*

To create a filter:

1. Press the Add Filter button  on the Call Management window toolbar.

   This will display the Add Filter dialog window.

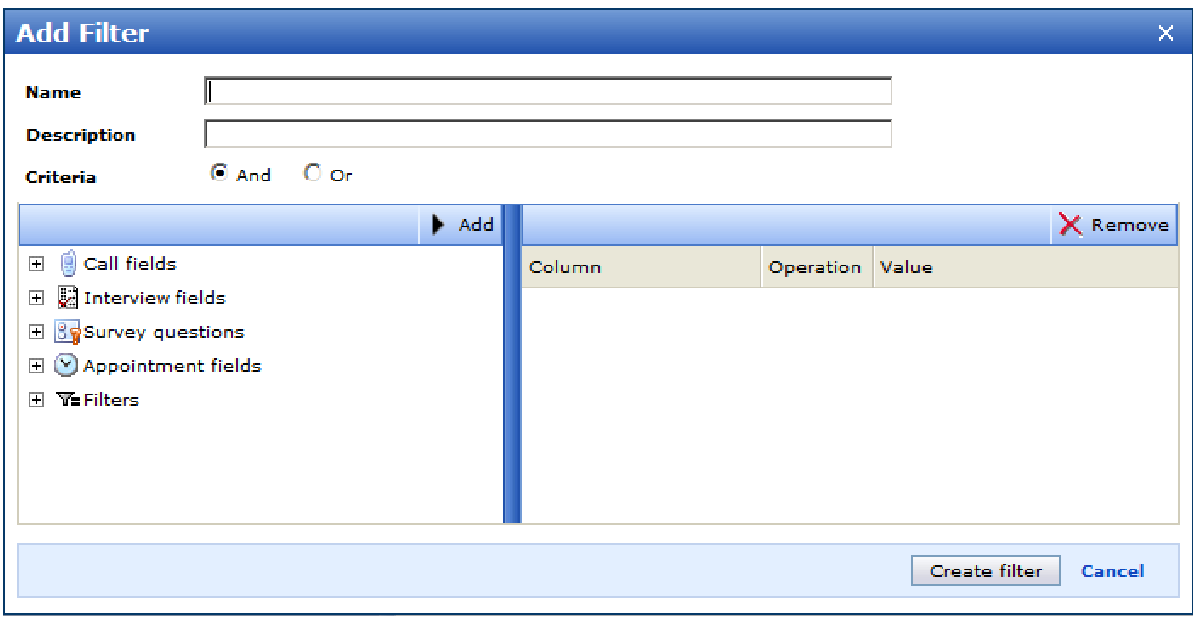


Figure 126 The Filter dialog window (empty)

2. Please refer to Creating a new filter on page 101 for detailed instructions on creating a new filter.

3.5.8 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 the questions which are marked as "Available as CATI filter". Questions can be marked as "Available as CATI filter" in Confirmit Authoring, please 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 Select Questions dialog window.

To display question columns in the interview/call list:

1. Press the Add Question button on the toolbar.

   This will display the Select Questions dialog window.

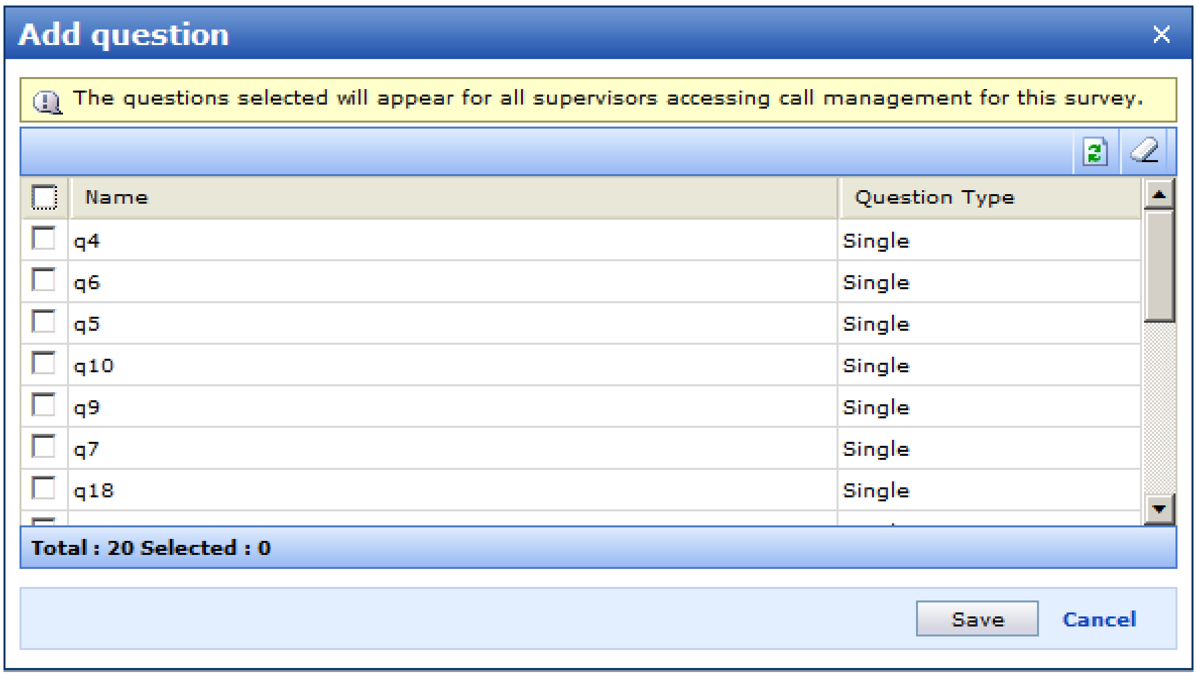


Figure 127 Adding a variable column with the help of the Select Variables dialog window

2. The list in this dialog window shows questions used in the current Confirmit survey.
3. Grid columns display the survey question name and type. Survey questions in fact are variables. Use this information to select the required questions (variables) – they are selected when the appropriate box in the leftmost column is checked.
4. Press the Clear Selection button above the grid to deselect all of the selected questions at once.
5. Press the Refresh button above the grid to display the most recent question list.
6. Press Save when you finish selecting questions. This will close the Select Questions dialog 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 open again. Added columns will remain available until you finish your current session and close CATI Supervisor.

3.5.9 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.

A context menu containing these commands is invoked by right-clicking the corresponding interview row in the interview list in the top right frame. These context menu commands can also be executed for a number of interviews selected in the interview 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 which are currently in the particular state can be filtered 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.

3.5.9.1 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 press Add New button on the toolbar. This will display the Add New dialog window.

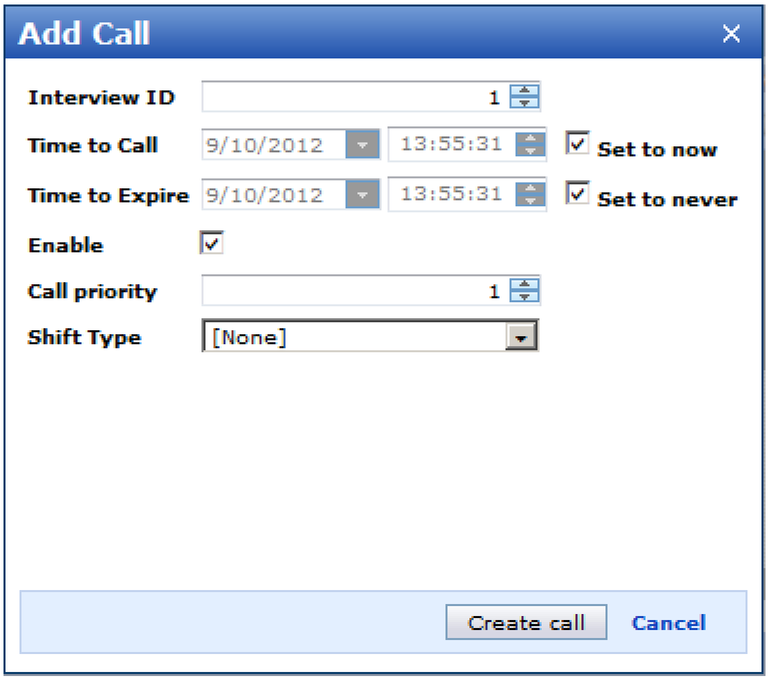


Figure 128 Adding/modifying the call properties

This dialog allows configuring 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.

Please refer to Disabling and enabling calls on page 120 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 Editing a call on page 128.
6. After all call properties are specified press 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.

3.5.9.2 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 be performed for a Scheduled, or an Active call only. So the Edit command becomes available only when the Call Management window displays the Scheduled, or Active call list.

The Edit command allows modifying a set of the call properties, such as "Call Priority", "Shift Type", "Time to Call", "Time to Expire", and also allows enabling the disabled calls from a single dialog window. You can also instantly modify separate call properties using appropriate context menu commands, please refer to the following topics – Changing a call priority on page 143, Changing the shift type for a call on page 144, Assigning a person/group to a call on page 145, Moving an interview/call on page 130, Disabling and enabling calls on page 120.

To edit a scheduled call:

1. Open the survey containing the required call in the Call Management window (see Viewing the interview/call list on page 110 for instructions).

   On the toolbar choose the Scheduled, or Active interview/call state in the State drop-down list.

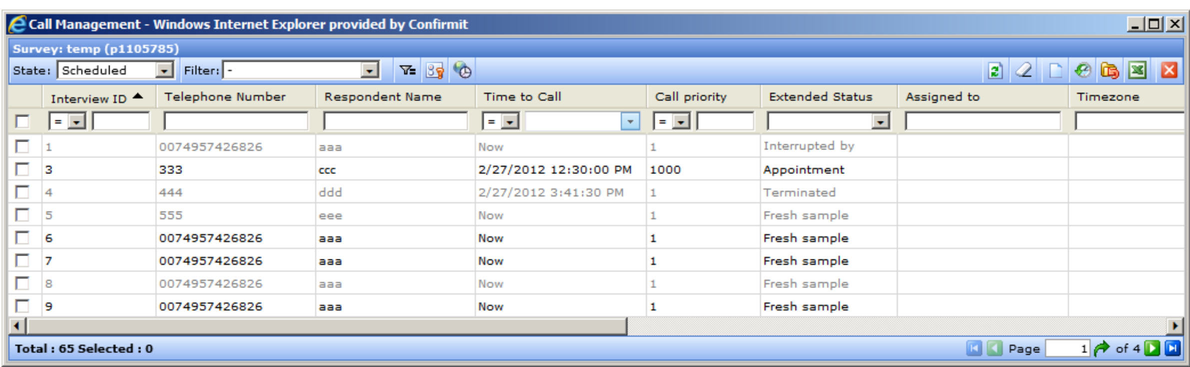


Figure 129 Call Management dialog window displaying scheduled calls only

2. Right-click the required call in the list and choose Edit from the context menu.

   Choosing this command will display the Edit dialog window.

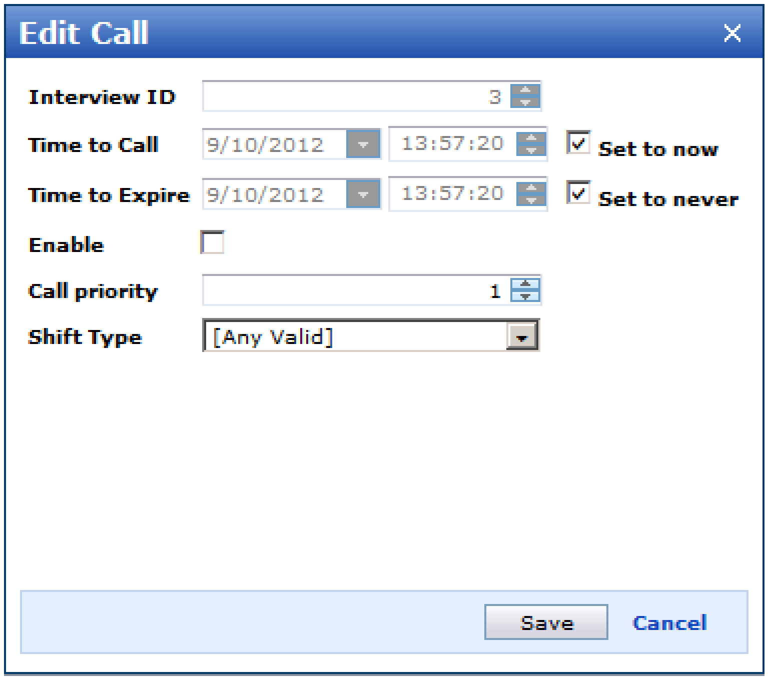


Figure 130 Editing call properties using the Edit dialog window

3. Using this dialog window interface you can modify the following call properties:
   - call priority
   - shift type
   - time to call
   - time to expire
   - enabling the disabled calls
4. The priority of a call is modified with the help of the Call Priority spinbox – press the Up or Down arrows on the spinbox to increase or decrease the value by one.
5. In case the call you are editing is disabled you can consider enabling it. To do this check the Enable box. Please read Disabling and enabling calls on page 120 for more information on the enabled and disabled calls.

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

5. The Interview ID cannot be modified using this dialog window. This value is for reference only.
6. The Shift Type can be modified using the Shift Type drop-down list. Choose a value from those specified for the current survey.
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 below these fields allows overriding the date and time values and forcibly specifying the call delivery time from the moment the Save button is pressed.
8. Time to Expire indicates the end (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 Never checkbox below these fields allows overriding the date and time values and specifying that the call should never be excluded from the delivery queue.

9. Press Save to confirm call property changes. This action will close the Edit dialog window and refresh the interview/call list in the Call Management dialog window.

3.5.9.3 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 Viewing the interview/call list on page 110 for instructions).

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

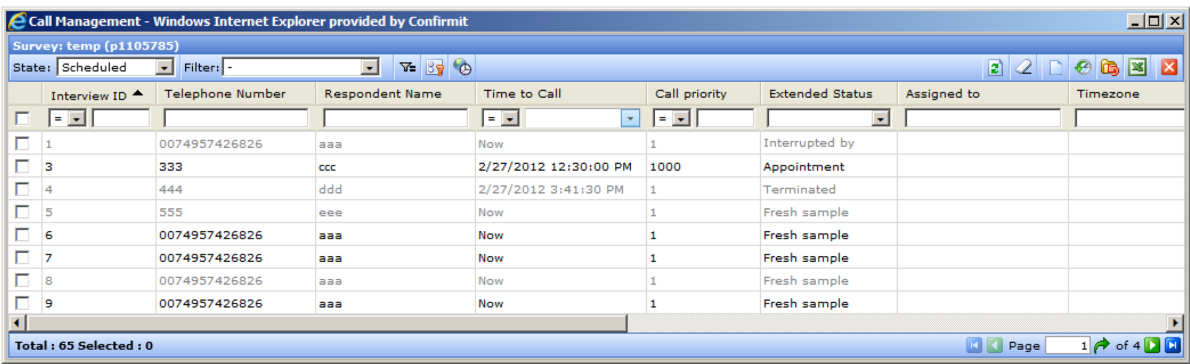


Figure 131 Call Management dialog window displaying scheduled calls only

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. Press OK to delete the selected calls.

3.5.9.4 Moving an interview/call

You can modify an Extended Status of any interview. For example, this can be useful if you plan to repeat an interview.

In the CATI Supervisor this is called moving an interview. 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.

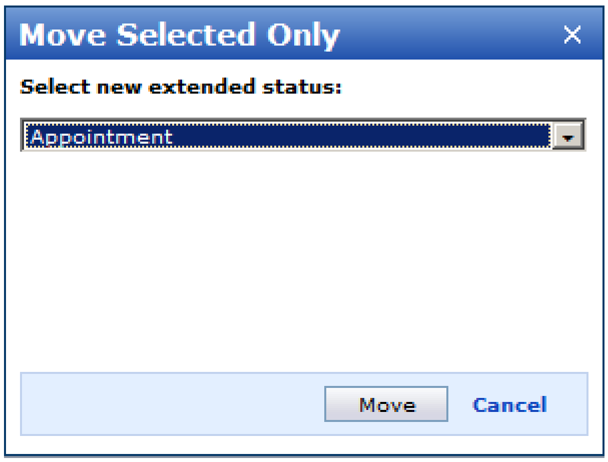


Figure 132 Move Selected Interviews Only dialog window

3. To move an interview into another Extended Status you should select a new Extended Status from the Extended Status drop-down list. Please refer to Appendix F - The list of the predefined Extended Statuses on page 430 for the complete list of the Extended Status Codes.
4. Press Move to confirm the change. This window will close, and another one will be displayed instantly. The window that appears next allows you to monitor the operation progress and outcome.

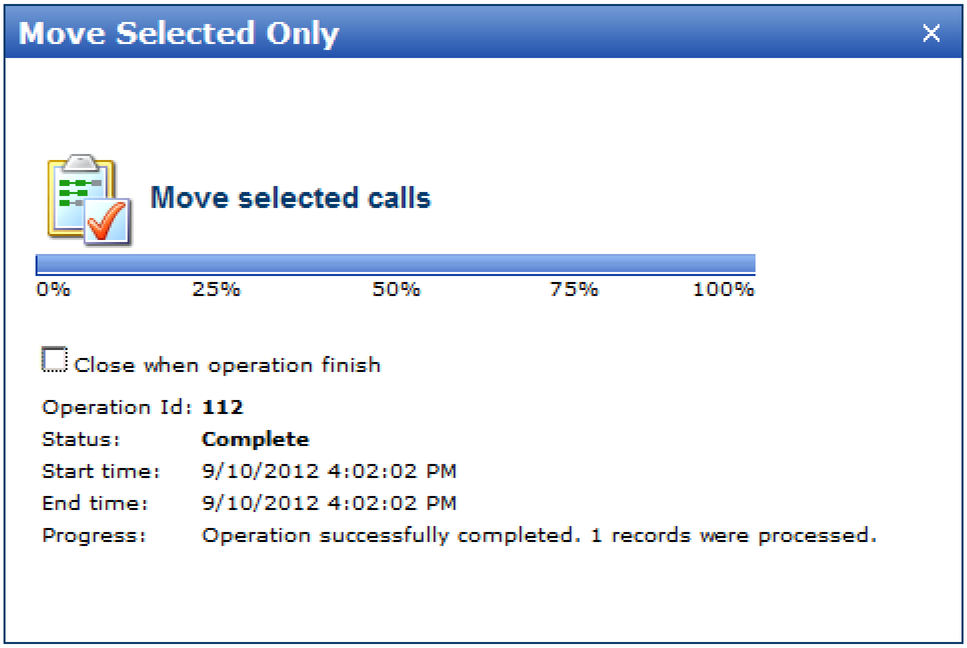


Figure 133 Move operation monitor window - operation completed successfully

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.

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

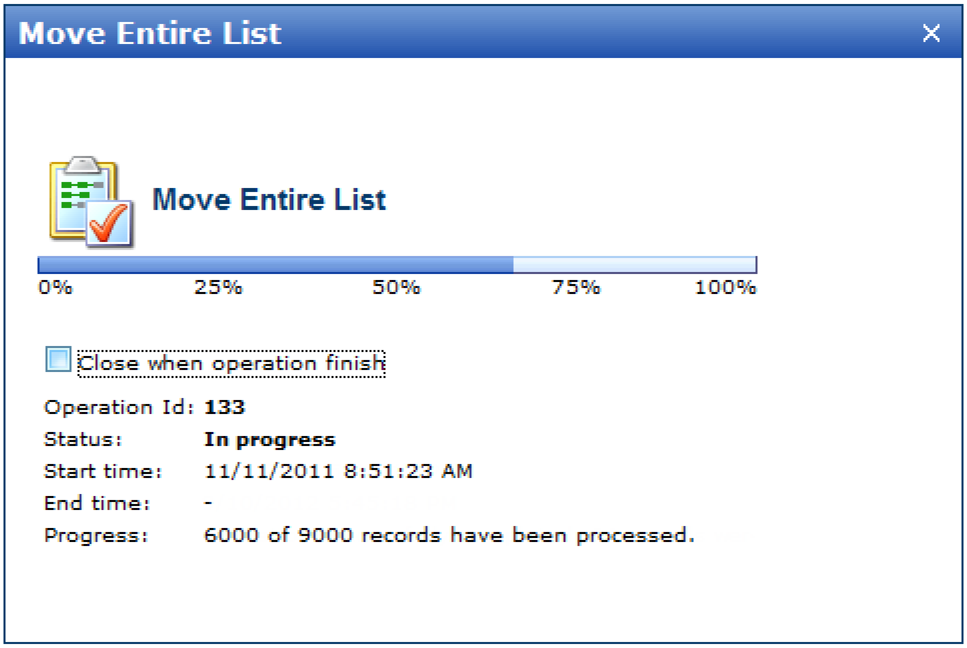


Figure 134 Move operation monitor window - operation in progress

The picture below shows the monitor window displaying information regarding the partially completed operation.

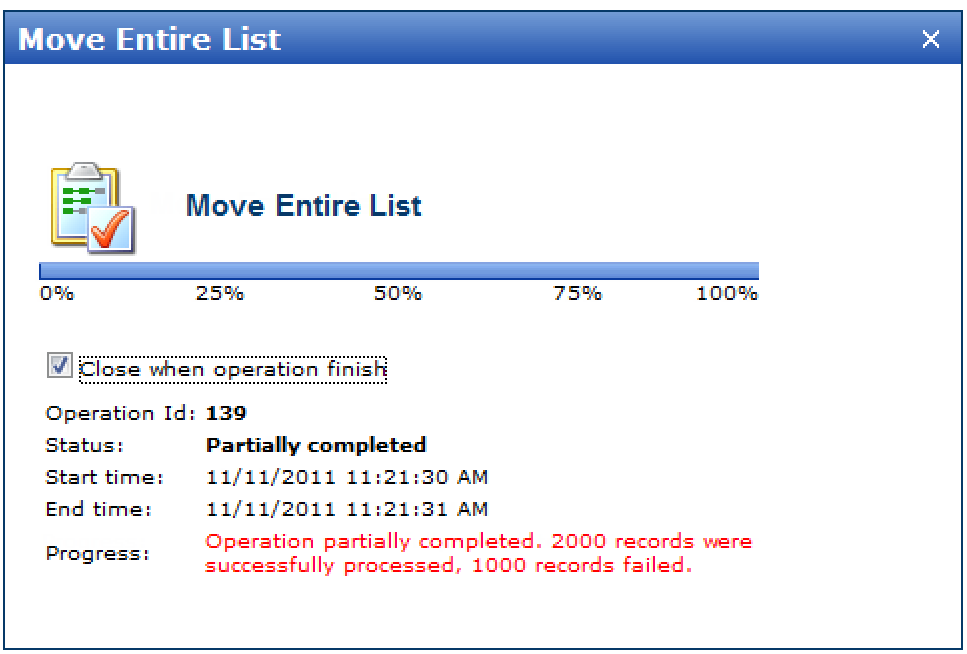


Figure 135 Move operation monitor window - operation partially completed

The next picture shows the monitor window displaying information regarding the failed operation.

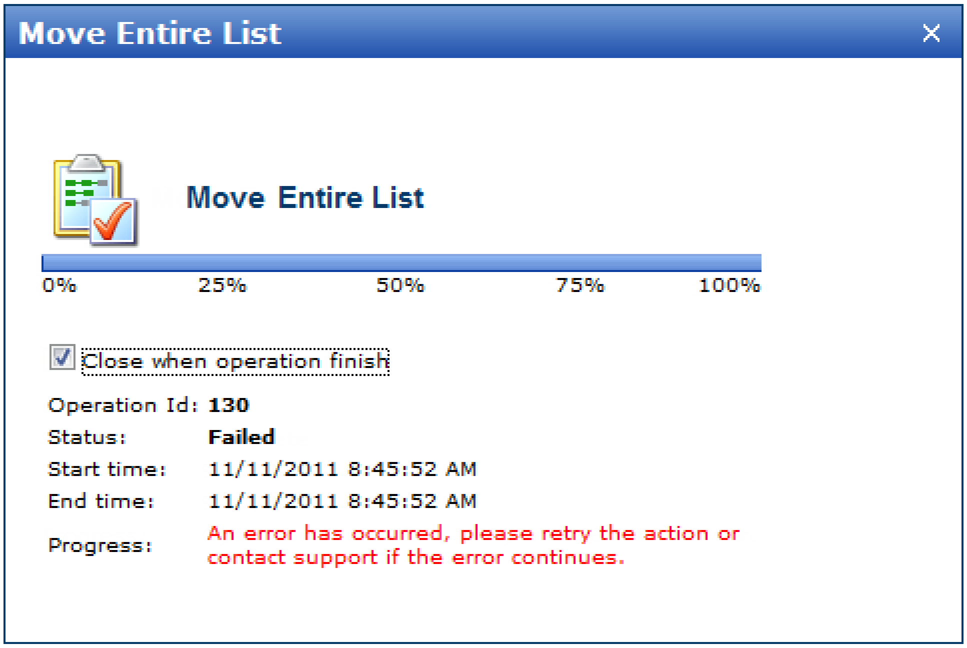


Figure 136 Move operation monitor window - operation failed

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 you can do else. 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 thje 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 is refreshed, and selected interviews/calls are moved to the specified statuses.

3.5.9.5 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.

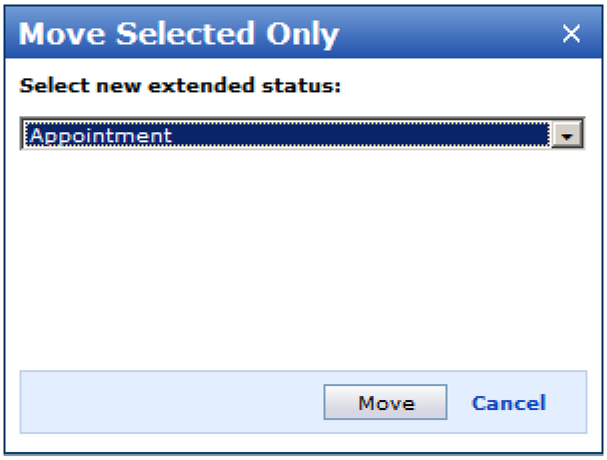


Figure 137 The Move and Reschedule Interviews dialog window

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. Please refer to Appendix F - The list of the predefined Extended Statuses on page 430 for the complete list of Extended Status Codes.
4. Press 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.

3.5.9.6 Activating an interview/call

You have an option of instantly modifying scheduling parameters of an interview. To do this you have to “activate” the interview/call.

By executing the Activate command you can instantly schedule the call, assign a person/group to this 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 persons who belong to specified groups. This type of assignment is called a "Multiple Group Assignment", please refer to Multiple Group Assignments on page 142 for details.

Note that when an interview is activated all the specified parameters COMPLETELY REPLACE the old ones that existed before this activation was executed.

Interviews can be activated: for a single person, for a single group, 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 Activate command is chosen, the confirmation dialog is displayed. Confirm the action by choosing Yes to proceed with the activation procedure.

   The appropriate Activate… dialog window is displayed next.

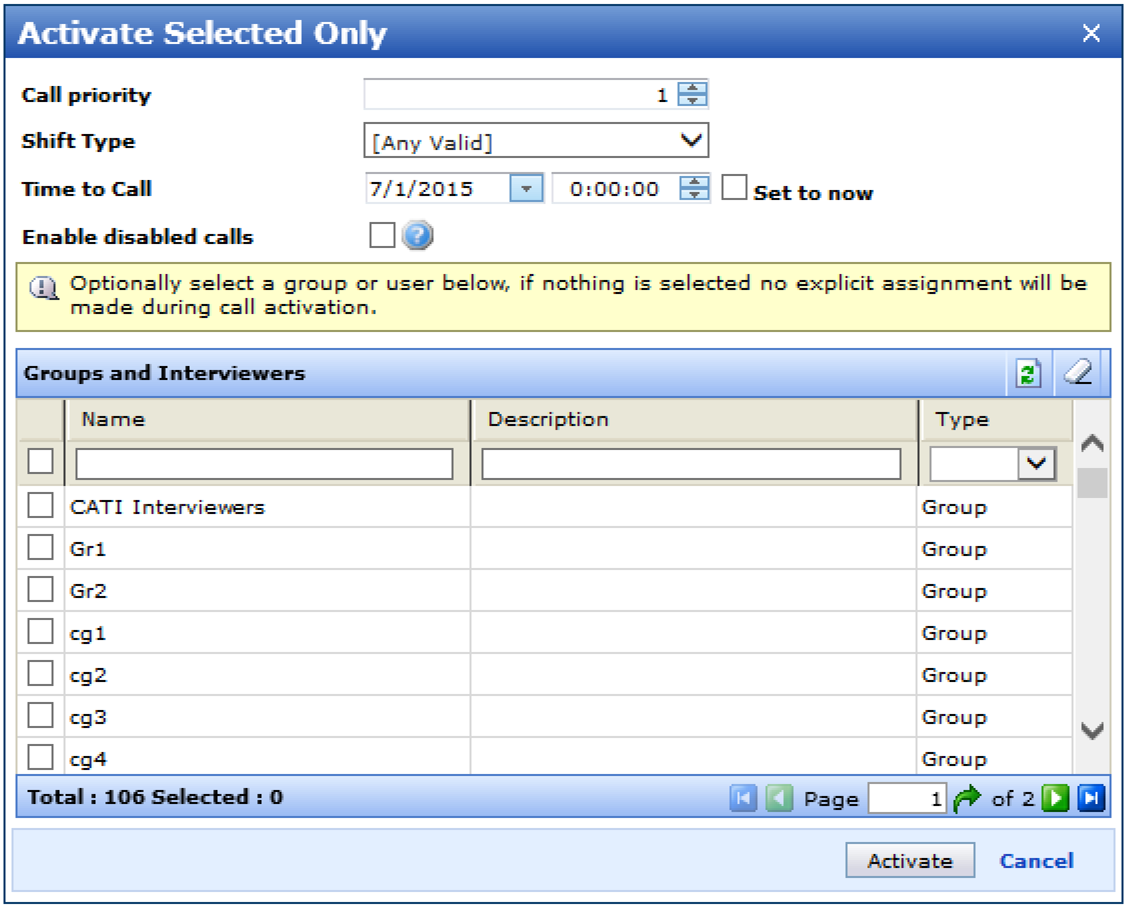


Figure 138 Activate Interview dialog window

3. Using this dialog window you can modify the following interview/call properties:
   - call priority
   - shift type
   - 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. The priority of a call is modified with the help of the Call Priority spinbox – press the Up or Down spin arrows to increase or decrease the value by one, or type the value directly in the field.
5. The Shift Type can be modified using the Shift Type drop-down list. Choose a value from those specified for the current survey. "Any valid" shift is used as the default for this setting.
6. 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 below these fields allows overriding the date and time values and forcibly starting the call delivery procedure the moment Activate button is pressed.

7. In case one or more calls you are going to activate is disabled you may need to enable them (please read 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.

8. 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.

9. 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.

   Please pay attention 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).

10. Press Activate to confirm interview/call property changes. The Activate… dialog window will close, and the Activate... progress dialog will be displayed instantly.

    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 number of persons, the following warning message is displayed.

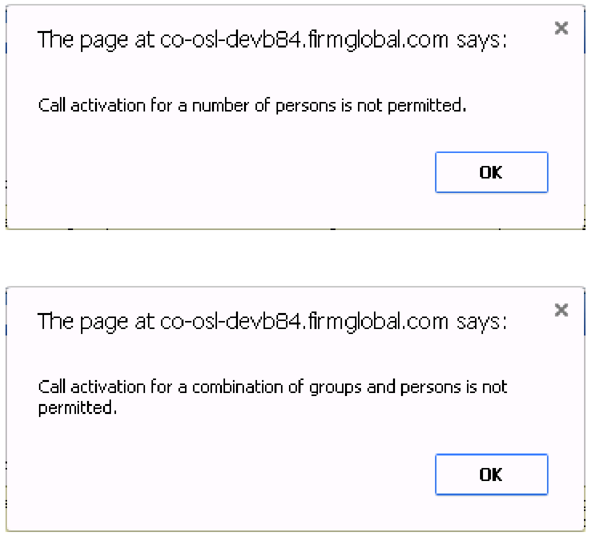


Figure 139 Warning message displayed when a wrong selection is made

Press OK to close the message. No interviews are activated after that. Make a supported 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.

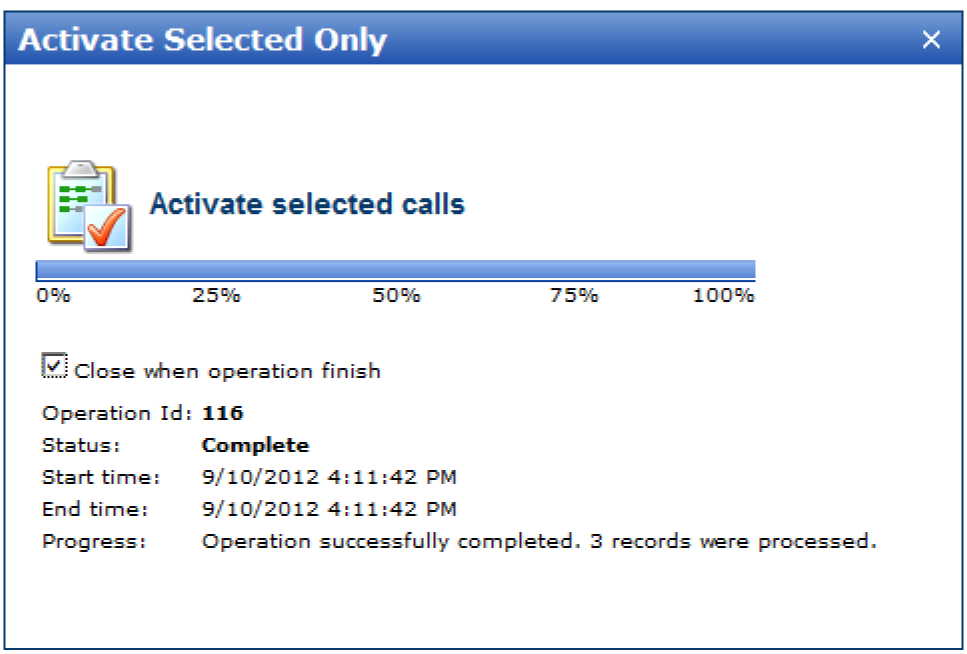


Figure 140 Activate operation monitor window - operation completed successfully

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.

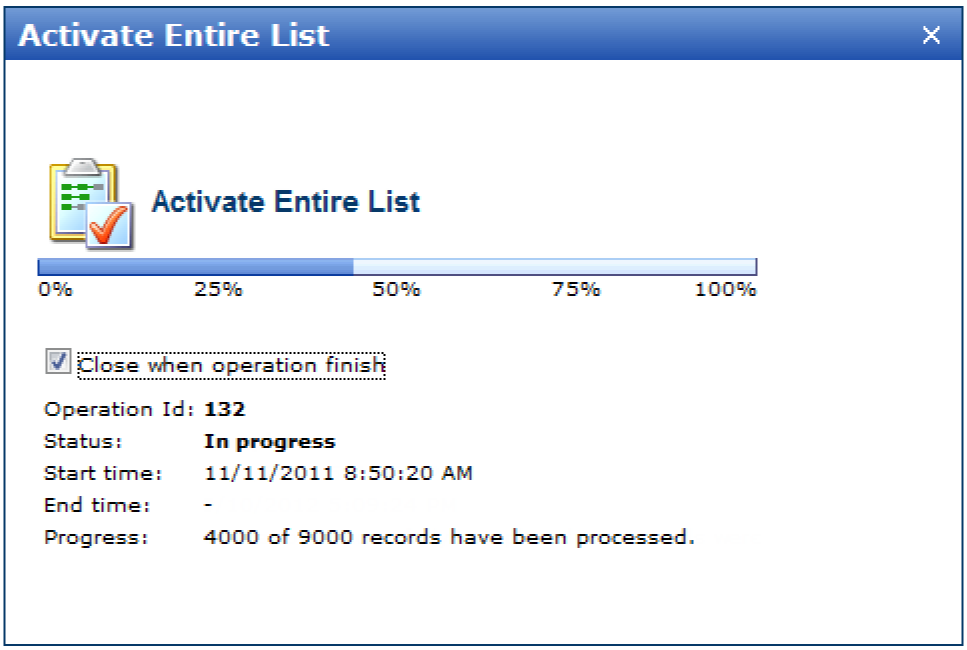


Figure 141 Activate operation monitor window - operation in progress

The picture below shows the monitor window displaying information regarding the partially completed operation.

Figure 142 Activate operation monitor window - operation partially completed

The next picture shows the monitor window displaying information regarding the failed operation.

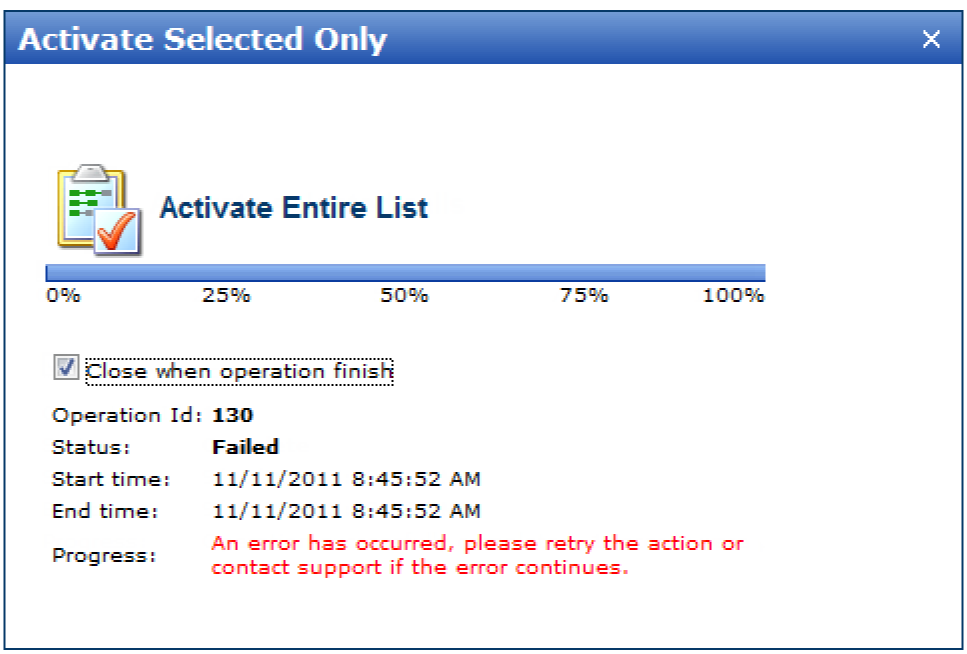


Figure 143 Activate operation monitor window - operation failed

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 thje 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.

Comments concerning this topic? Send an email

3.5.9.7 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.

Please 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 (see Activating an interview/call on page 135),
- Call assignment (see Assigning a person/group to a call on page 145),
- By way of specifying such assignment in the loaded sample (please 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 Specifying scheduling script rules on page 214 and Appendix A - Action parameter descriptions on page 419 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.

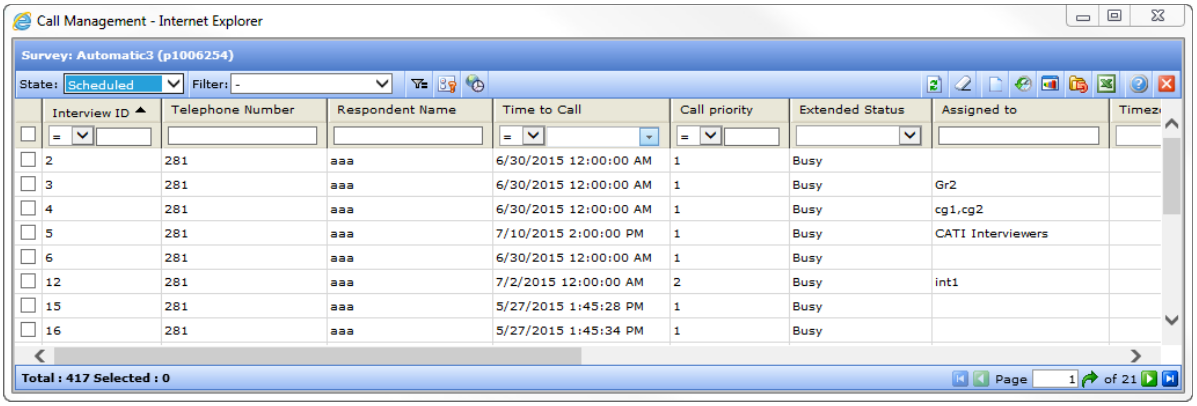


Figure 144 Interview with ID 4 has a Multiple Group Assignment

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. Please note that if only one group ID specified in the sample happens to be incorrect the whole multiple assignment operation is canceled. Please 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.

3.5.9.8 Changing a call priority

You have an option of instantly changing any call priority.

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… dialog window.

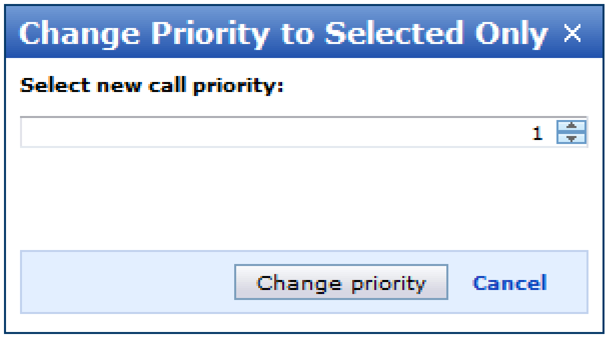


Figure 145 Change Priority of the Interview dialog window

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

3.5.9.9 Changing the shift type for a call

You have an option of instantly 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.

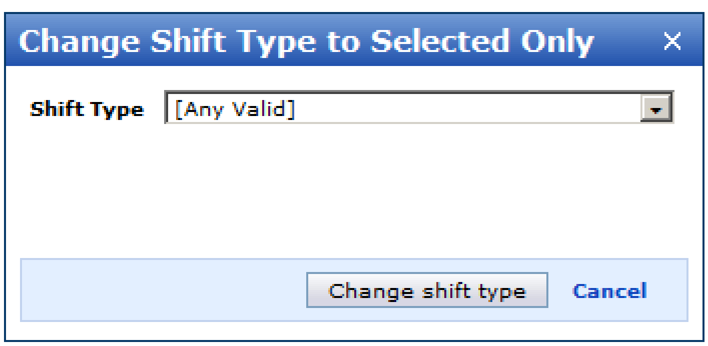


Figure 146 Change Shift Type dialog window

4. To change a shift type for a call you should select a new value from the Shift Type drop-down list.

5. Press 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.

3.5.9.10 Assigning a person/group to a call

You have an option of instantly 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", please refer to Multiple Group Assignments on page 142 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.

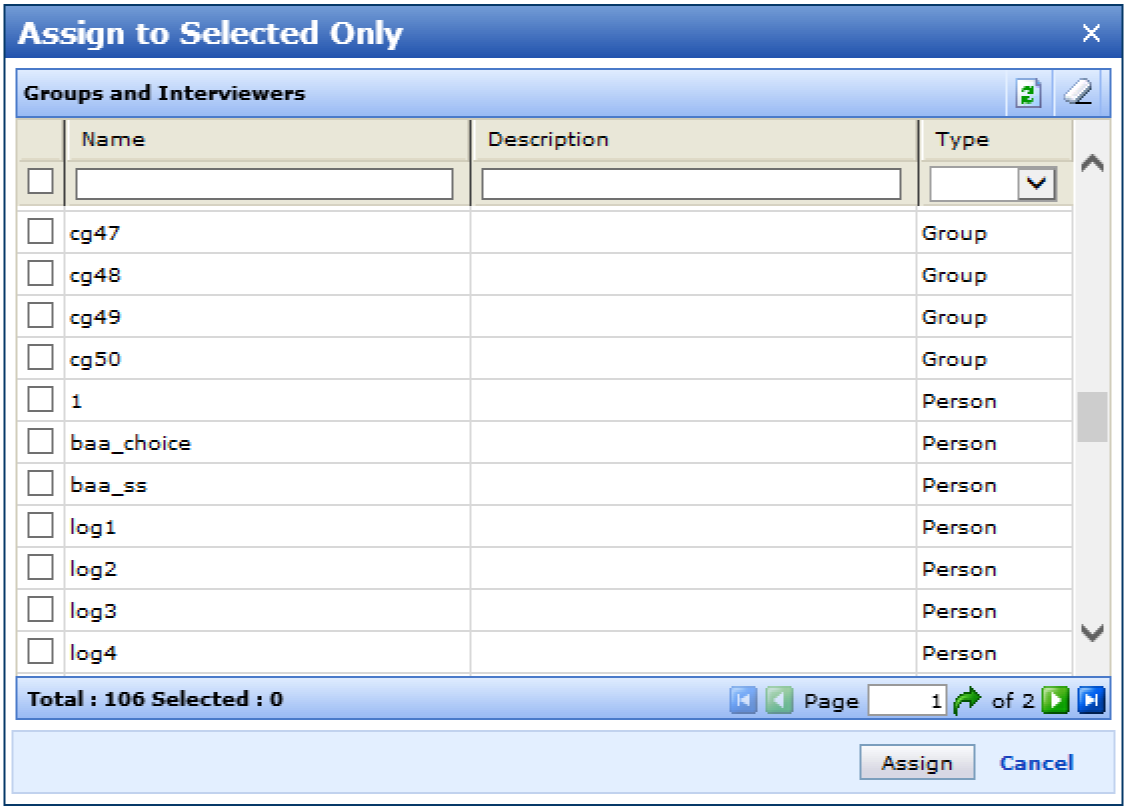
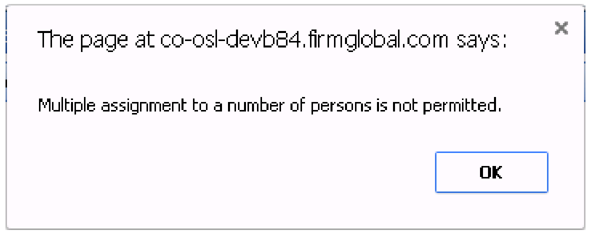


Figure 147 Assign to a Call dialog window

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. Press 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.



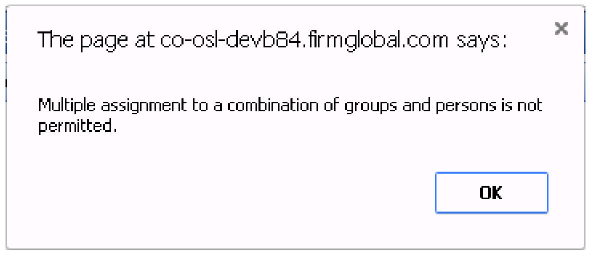


Figure 148 Warning messages displayed when a wrong selection is made

Press 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. Please refer to Monitoring the operation outcome on page 139 section for description of this window.

3.5.9.11 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 Dialer on page 341 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.

Please 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 - please refer to Dialer on page 341 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).

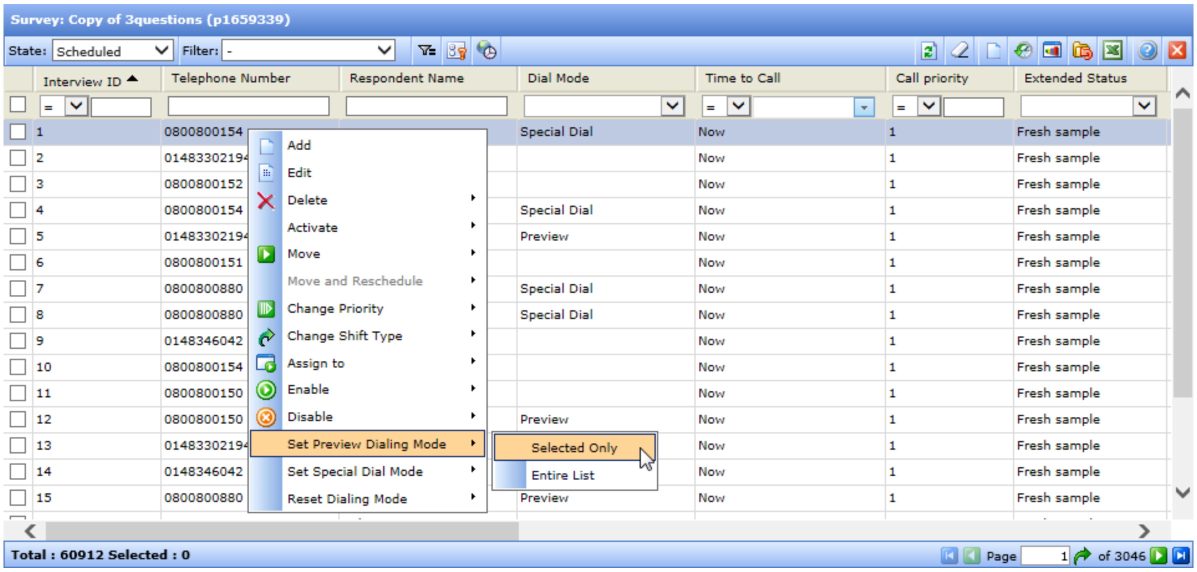


Figure 149 Choosing the dial mode in the Call Management window

3.5.9.12 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)..

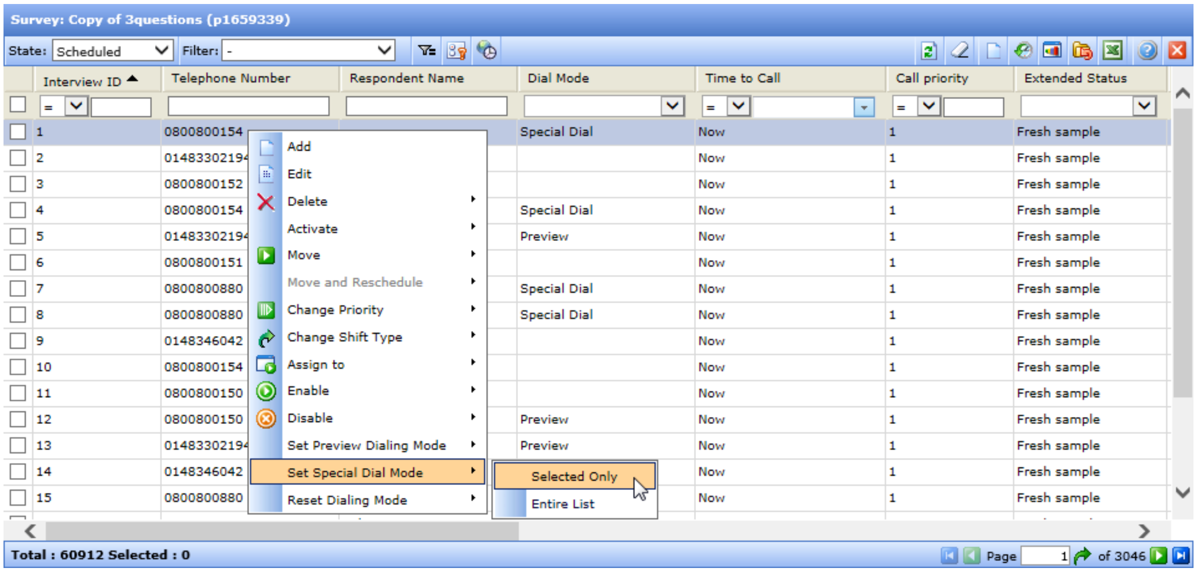


Figure 150 Choosing the Special Dial mode in the Call Management window

3.5.10 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.

Currently the Reviewer module supports editing of responses to the open-end text questions. Responses to other question types are available for viewing and playback only.

When a supervisor starts playback of the particular question they are provided with functionality similar to that used for deferred monitoring (see Deferred monitoring in CATI Supervisor on page 315 for details regarding this functionality).

You can start your work in the Reviewer module either by creating a new "session" (see Creating a review session on page 150 for information), or by viewing the list of existing "sessions" (see Viewing the list of review sessions on page 151 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 Working with the Session Overview page on page 165).

Supervisors can stop working in the Reviewer module at any point as any changes are automatically saved when the 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. Please refer to section topics listed below for information.

3.5.10.1 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 instantly in the Reviewer module. Or you can create a session without opening it - it will just 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 instantly

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 instantly 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.

   Please refer to Reviewing an interview on page 157 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.

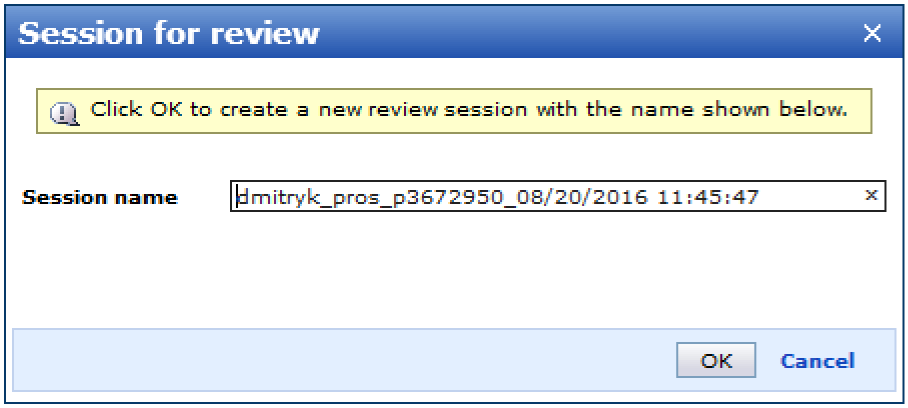


Figure 151 Creating a session - start with the session name

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.

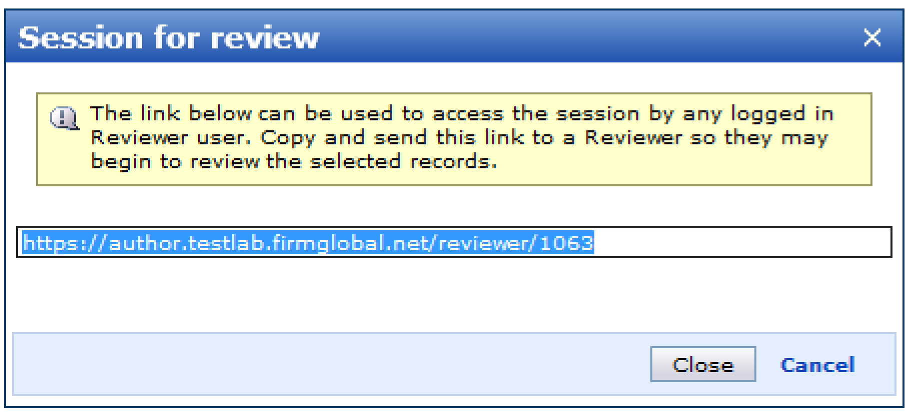


Figure 152 Creating a session - save this link to provide it to a person who will perform the review

3.5.10.2 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. Press the Go to Reviewer button  on the Call Management dialog toolbar. This will open the Reviewer module in a separate browser window and display the Session List.

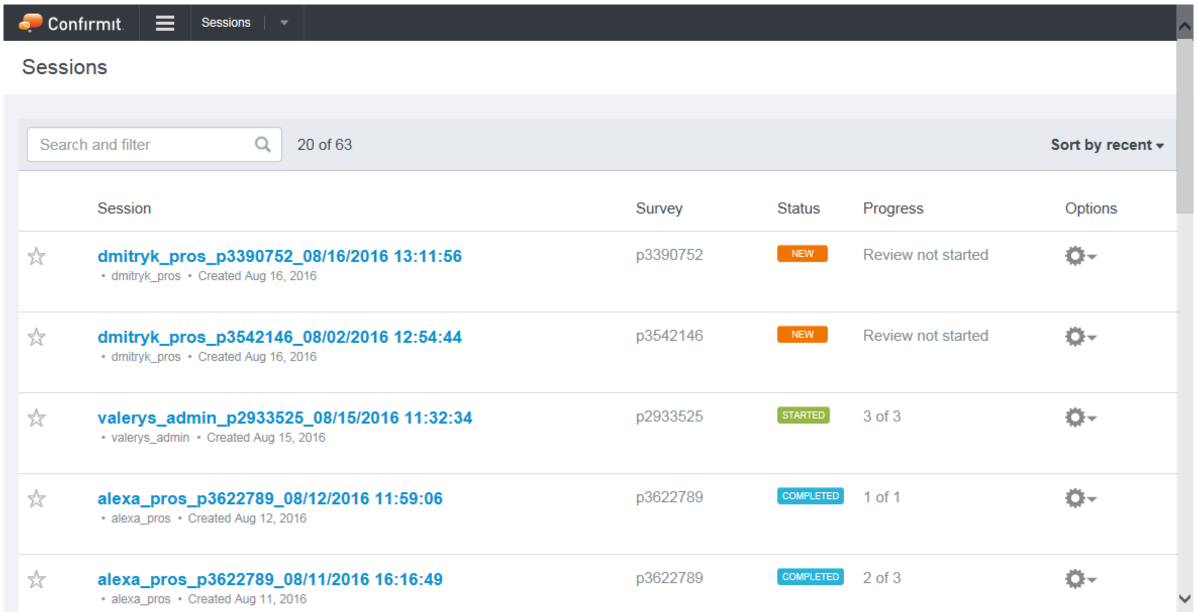


Figure 153 The list of sessions displayed in the Reviewer module

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.

3.5.10.3 Selecting questions to include in the review session

The user can choose which questions will be included in the review session. By default the Reviewer module includes no interview questions in a review session. All interview questions are listed on the Selected Questions page which is displayed when you choose the session name on the Session List page (see Viewing the list of review sessions on page 151), or click the Questions link on the Session Review page (see Reviewing an interview on page 157).

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 on the Select Questions tab. 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):

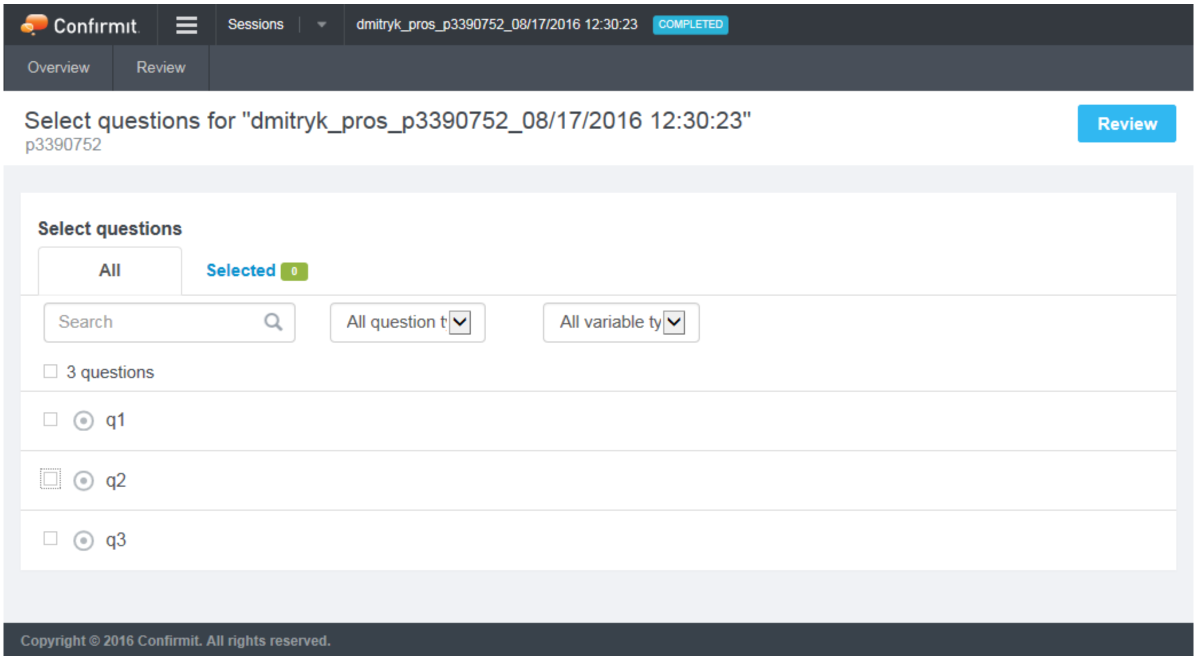


Figure 154 Session opened on the All questions tab

Or you may be shown the Selected tab if you’ve previously selected questions for this session (see the picture below).

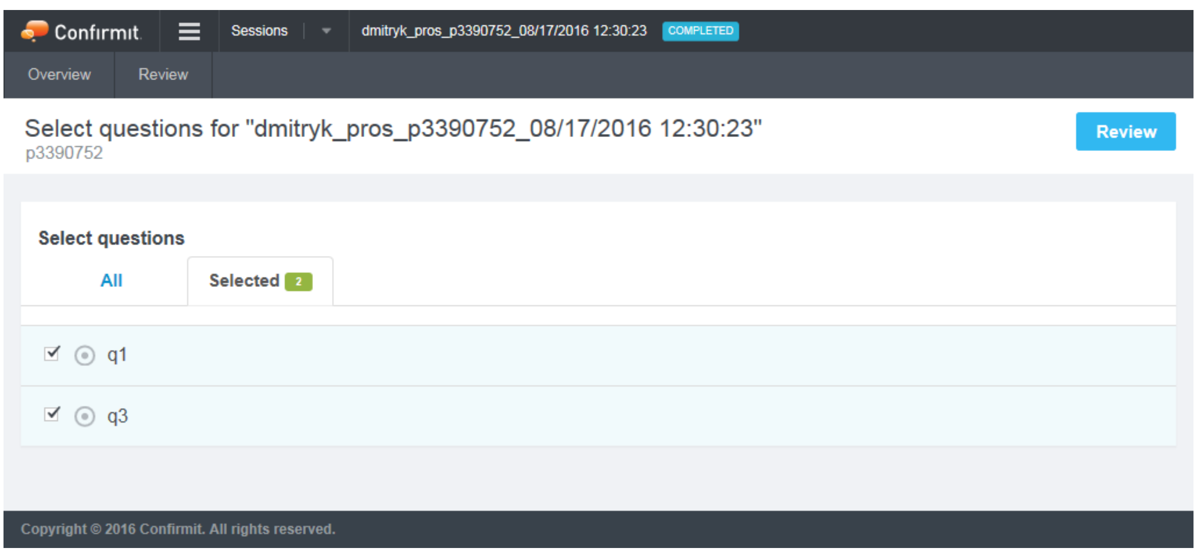


Figure 155 Session opened on the Selected questions tab

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. Or you can filter questions by the variable types used in the question - select one from the next drop-down box to do this.

Note that when no questions are added to the filter ALL questions will be included in the session.

3. On the Selected tab you can remove the question from the session by clearing the corresponding box. . In the case of a session that 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:

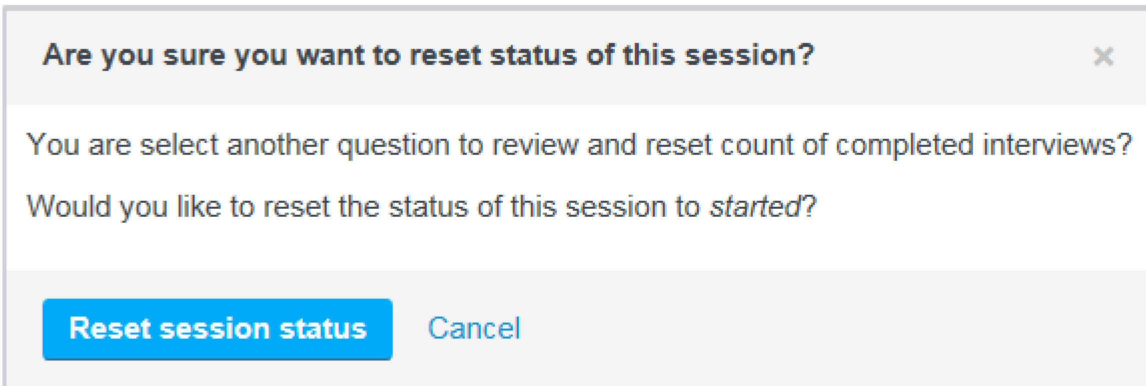


Figure 156 Warning displayed when a question is removed from the started/completed session

Press 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:

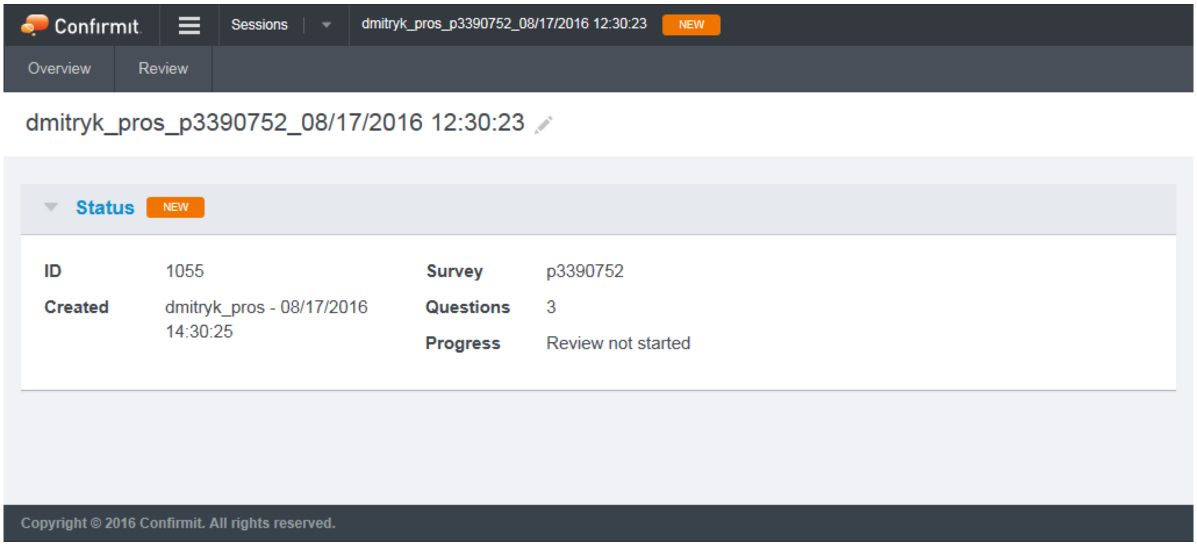


Figure 157 The Overview page of the opened session

This page lets you rename the session. Click anywhere in the field that contains the session name.

The 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 (see the picture below)

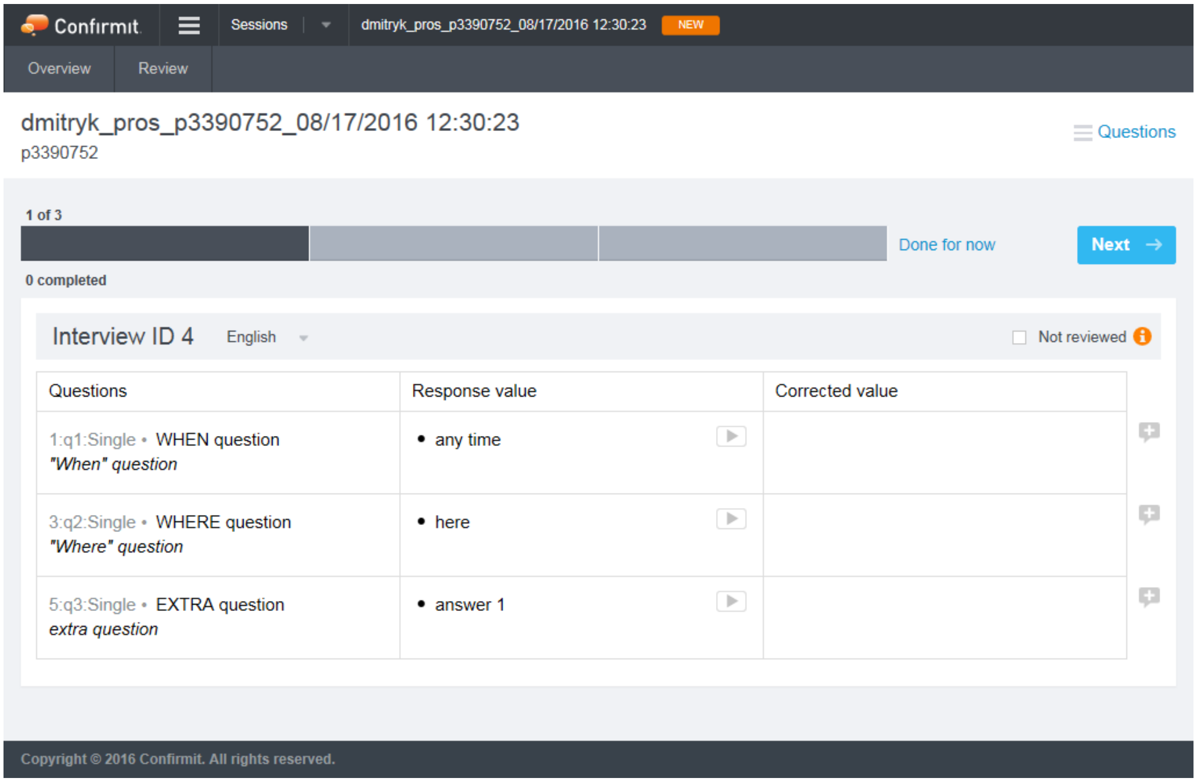


Figure 158 Session review page

The review procedure is described in details in Reviewing an interview on page 157. Please 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.

3.5.10.4 Reviewing an interview

You can start reviewing an interview when you have selected questions that are to be included in the review. Refer to Selecting questions to include in the review session on page 153 for instructions on selecting questions for review.

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 - press 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 - press 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. 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 (see the picture below):

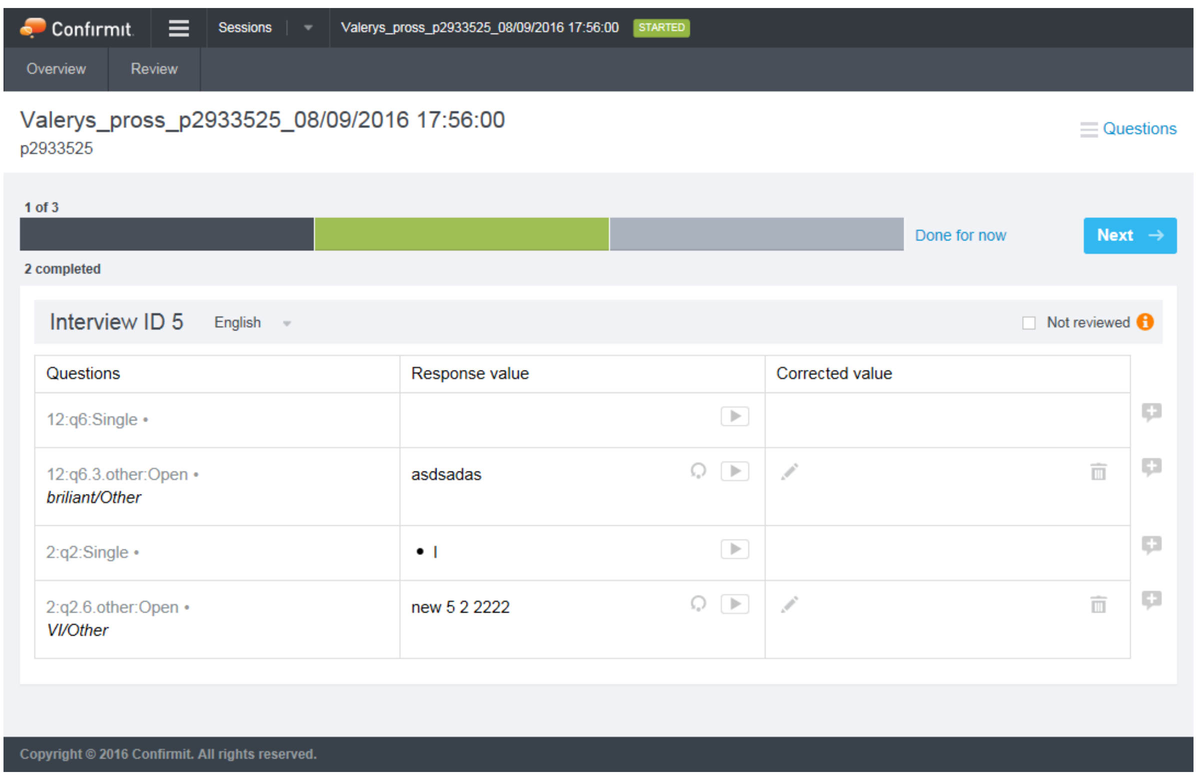
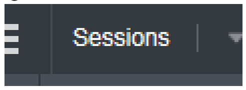
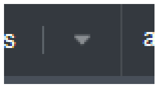
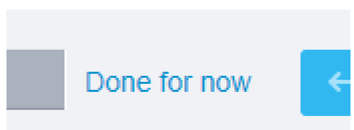
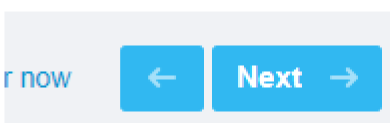


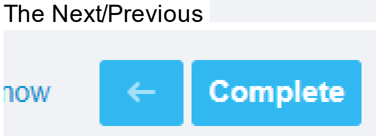
Figure 159 Review window showing session with two interviews completed

- The Review page header is similar for all pages used with the Reviewer module. It contains a link to the Session List Page 

(see Viewing the list of review sessions on page 151), a drop-down control  which allows instantly opening any of the recent sessions in the Session Overview page (see Working with the Session Overview page on page 165). 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 (see Session status indicators on page 168for details);
- Below are the Overview and Review tabs. The Overview tab opens the current session in the Session Overview page (see Working with the Session Overview page on page 165), 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 (see Selecting questions to include in the review session on page 153). 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 

allows the user to simply leave the review session before he/she completes reviewing of all interviews. You can click this link at any time before you finish reviewing all interviews. This action does not assign the "Completed" status to the session, it simply allows the user to leave without changing the current session status (see Session status indicators on page 168 for information on session statuses). This action takes you to the Session list.
- The Next/Previous 

and the 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. Pressing the Complete button will finish the current review and assign the interview the Completed status.

  Note that it is also possible to 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:

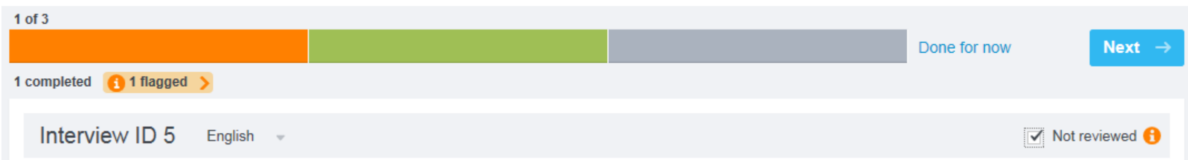


Figure 160 Not reviewed warning shown in the review grid

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 instantly redirected to the corresponding interview - it is displayed in the grid then.

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 play icon is also available to start playback of the recording related to the question.

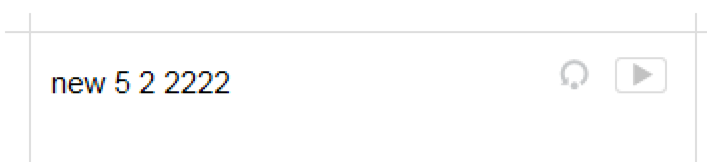


Figure 161 Response value showing the original response value and action icons

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 moment this question was answered by a respondent (please refer to The CATI Supervisor Player on page 317 for description of the CATI Supervisor Player and its functionality). 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 (see Deferred monitoring in CATI Supervisor on page 315 for details regarding this functionality). 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 Supervsior player window stays open and waits for user action. You can either close the player window at this point or press 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 amount of the recorded versions of the response is displayed next to the Play button in the Response value cell, like this .

Another icon is called Reset and it appears in the Response Value cell after the response value was corrected. When a response value retains its original value (no corrections were made at all) the Reset icon is not shown in the Response Value cell. Clicking the Reset icon resets the response value to the very 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. In case this question type supports correction of the current response value, the cell in the "Corrected value" column will display action icons - a pen icon and a bin icon, like this.

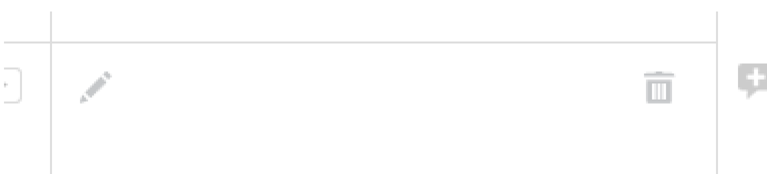


Figure 162 Corrected value cell containing action icons

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 instantly 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.

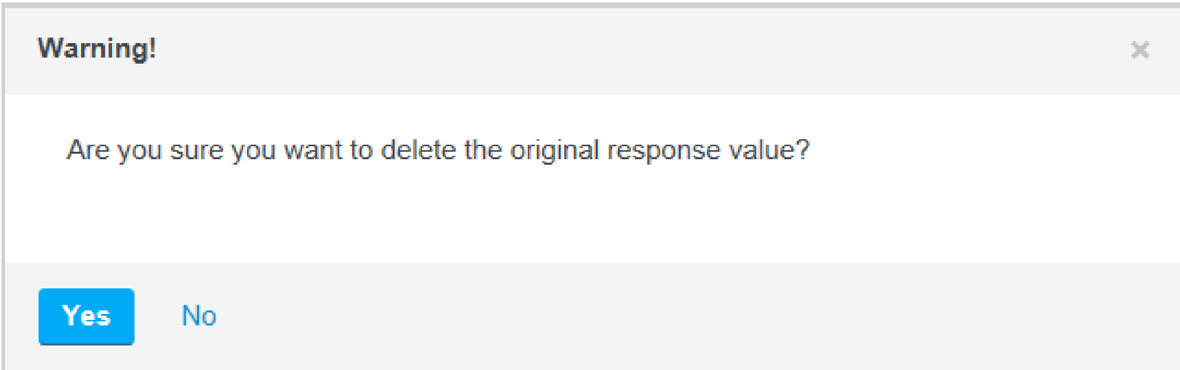


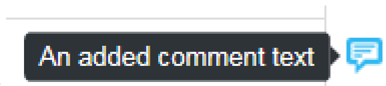
Figure 163 Warning message displayed upon attempt to delete a corrected response value

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

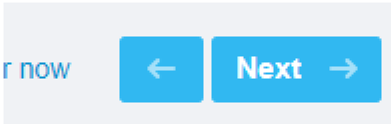
7. You can also add comments whilst reviewing (these comments will not be written to the survey data).

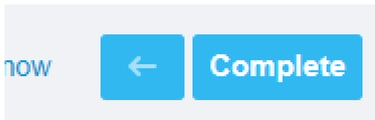
   Choose the Comment icon to the right of the Corrected response cell to do it. This will display the Add comment dialog.

Figure 164 Adding comment to a question

Type your comment in the dialog and press 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 you can 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 reach the final interview in the current review session and finish reviewing it you can press the Complete button 

. Pressing the Complete button 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 (please refer to Working with the Session Overview page on page 165 for information regarding the Session Overview page).
10. You can also complete a review session at any point. Refer to Completing an unfinished session on page 164 for instructions.

Any session which is assigned the Completed status can be reopened for reviewing at any moment later (see Reopening a completed review session on page 167 for details).

3.5.10.5 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).

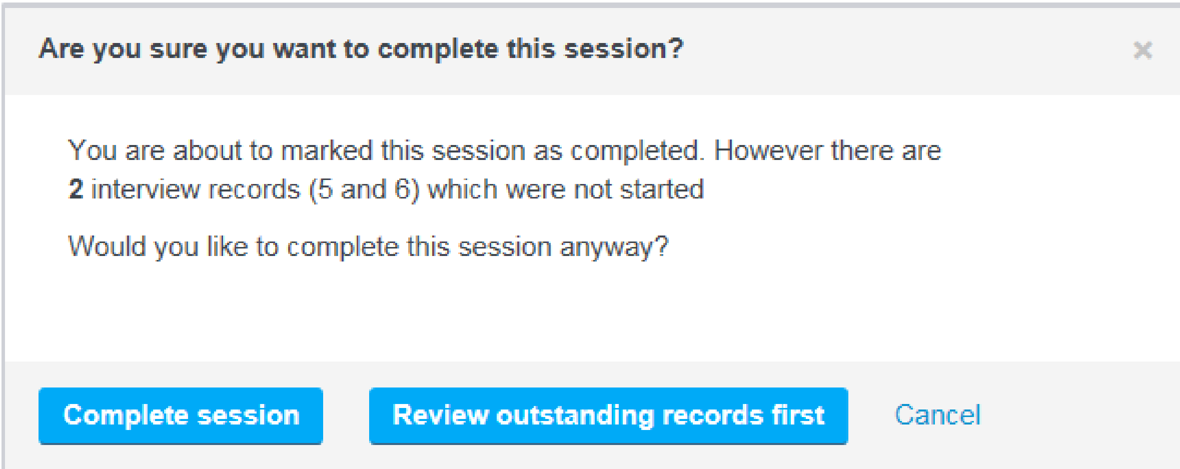


Figure 165 Warning displayed when an unfinished review session is being completed

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 Reviewing an interview on page 157 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 Viewing the list of review sessions on page 151 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 Warning displayed when an unfinished review session is being completed on page 165 for illustration).

3.5.10.6 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.

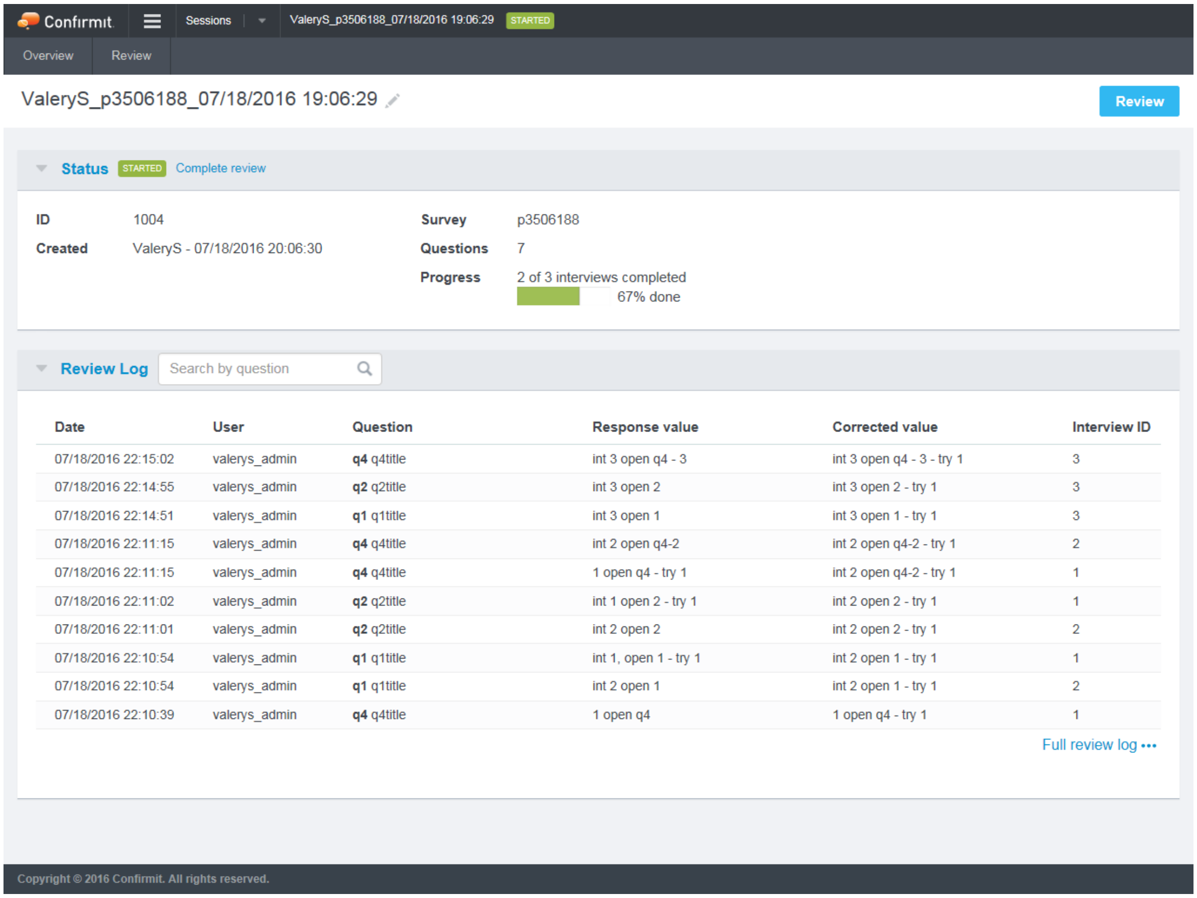


Figure 166 Review session information displayed on the Session Overview page

2. The header frame of the page contains:

- the Sessions link which opens the Session List page (see Viewing the list of review sessions on page 151);
- 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 Session status indicators on page 168).

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 Reviewing an interview on page 157).
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 Reviewing an interview on page 157 for information regarding the Session Review page)

5. Below is a section that contains session properties:

- the session status (see Session status indicators on page 168 for details) and an action hyperlink which you can depending on the current review status use either to complete a "Started" review session 

(see Completing an unfinished session on page 164 for details) or reopen a "Completed" review session 

(see Reopening a completed review session on page 167 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 string where a "Search by question" prompt is displayed. Special characters like asterisk, ampersand, comparison signs etc. are supported. You can use a logical expression to search for question names.

3.5.10.7 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 Working with the Session Overview page on page 165 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 Reviewing an interview on page 157.

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 Selecting questions to include in the review session on page 153 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".

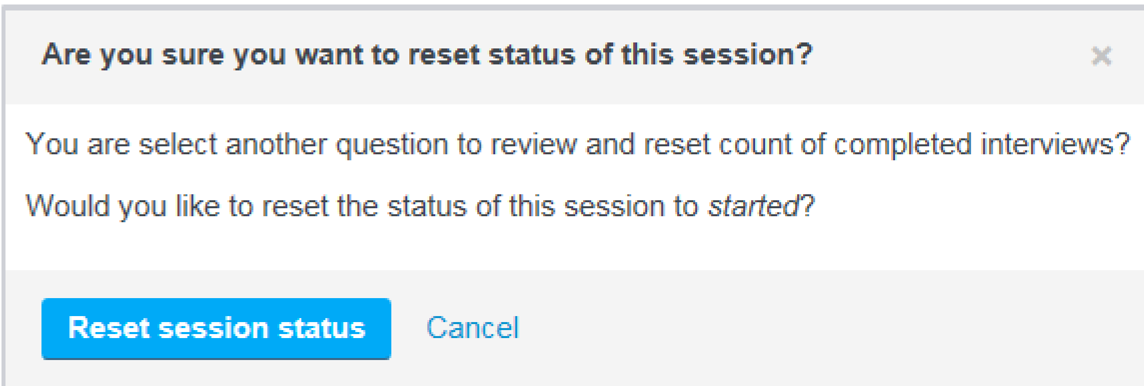


Figure 167 Redefining question set used in a completed session and putting this session into a "Started" state

Press 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 Reviewing an interview on page 157 for instructions on reviewing a session).

3.5.10.8 Session status indicators

There are three possible statuses in which any Review session can be. Statuses and verbal progress descriptions clearly tell the user in what state the session review is at the moment and how many interviews should be reviewed for this session to be completed. Each status is complemented with the colored indicator (see the list below for illustration).

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 should be 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.

3.5.10.9 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.

3.5.11 Recording and playing back conversations held in the course of the interview

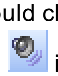
The CATI Supervisor module allows for recording of the interviewing process. In CATI Supervisor this function is called the Deferred monitoring. Please refer to Deferred monitoring in CATI Supervisor on page 315 for complete description of this function. Initial steps required to enable the deferred 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. Press 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.

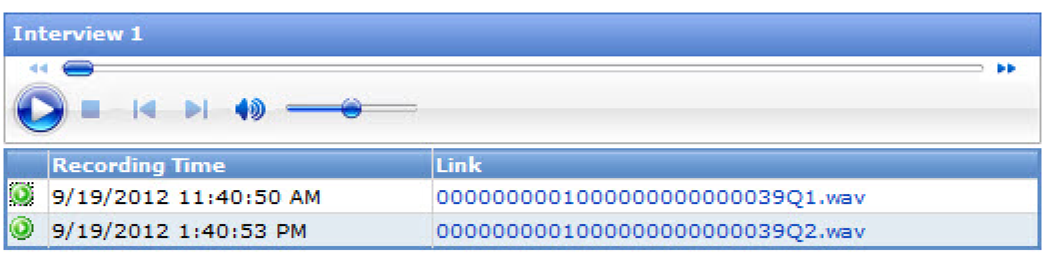


Figure 168 Playing back the audio track from the recorded interview

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

3. 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 the picture above contains two audio files that are 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 contains 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).

   Take a note of the Link column - this is a direct link to the audio file that contains 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 instantly in the default audio player application.

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

4. The playback will stop after the audio track finishes. You can repeat the playback of the same interview, or you can close the audio player window by pressing the Close button.
5. Repeat the procedure from step 2 to play back the audio track from another interview.

3.5.12 Exporting interview/call list

The list of existing interviews/calls can be exported in MS Excel format.

The exported list can either be instantly opened for viewing, or saved for later use.

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. Press the Export button on the toolbar. This will display the Export dialog window.

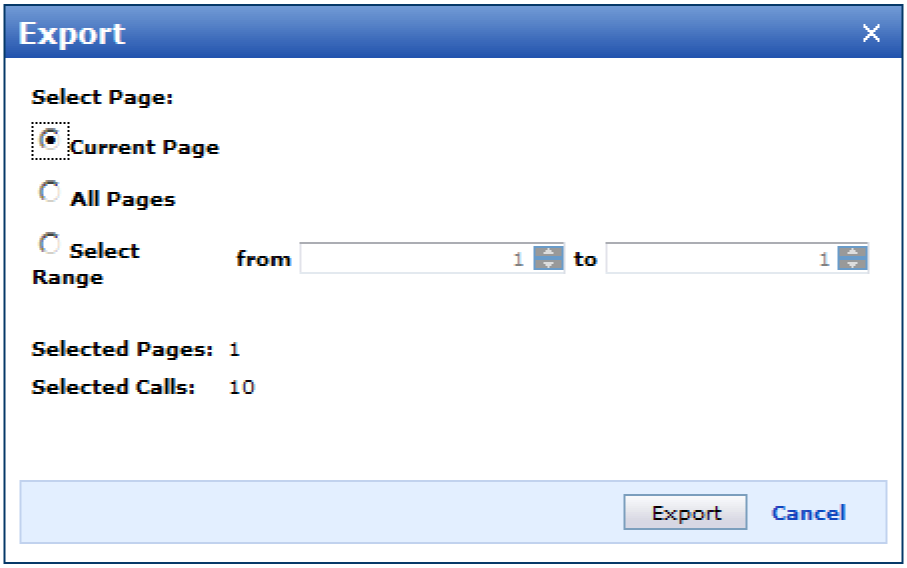


Figure 169 Exporting interview/call list

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. Press Export to start the export, or Cancel to close the Export dialog without performing the command. In a while after you press Export button the standard Windows dialog prompting you to save or view the exported file appears. Choose View to instantly 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.

3.6 Survey assignments

You, as the Supervisor, can assign users responsible for performing interviewing for a specific survey or define certain surveys for specific users. This way you can create *survey assignments*.

You can either pinpoint a survey (or a number of surveys), and then assign interviewers/interviewer groups to this survey, or you can start with pinpointing interviewers/interviewer groups and then assign different surveys to these persons/groups. The order makes no difference, you can act the way that is most convenient for you. You got the ability to replace all the existing assignments at once.

The CATI Supervisor provides three ways to create assignments. The most versatile way is available with the use of the Survey Assignments dialog window. This dialog window allows for different combinations of surveys and persons/groups to be selected for making assignments and de-assignments (see Making assignments in the Survey Assignments dialog window on page 172 for instructions).

Another way to manage survey assignments is to use the Assignments tab in the Survey Properties View mode. This view mode allows modifying person/group assignments, but for the current survey only. All existing assignments can be viewed for each survey in the bottom right frame with the help of the View operation (see Viewing and modifying the survey assignments on page 66 for instructions). This tab allows both adding, removing and replacing survey assignments.

You can assign interviewers and interviewer groups directly to the survey you select in the Survey List in the top right frame. You can also replace existing assignments in the same way. These actions are available through the Add Assignments or Replace Assignments context commands (see Adding and replacing assignments for a selected survey on page 175 for instructions). 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 either the Survey Assignments dialog window (see Performing De-assign operation in the Survey Assignments dialog window on page 178 for instructions), or 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 (e.g. directly from the list of the interviewers, or interviewer groups, or by changing their properties in the View mode - please refer to Viewing and modifying the interviewer group properties on page 20, Viewing and modifying the interviewer properties on page 37, Adding and replacing survey assignments directly from the interviewer group list on page 25, and Adding and replacing survey assignments directly from the interviewer list on page 46 for instructions).

3.6.1 Making assignments in the Survey Assignments dialog window

The Survey Assignments dialog window is used for managing survey assignments - with the help of this window you can create new and remove the existing assignments.

The Survey Assignments dialog window also allows viewing all the assignments existing for each person/group and for each survey. You can view existing assignment details - which surveys are assigned to the particular interviewer/interviewer group, and, vice versa - which interviewers/interviewer groups are assigned to the particular survey. See Viewing survey and interviewer assignments in the Survey Assignments window on page 179 for this procedure description.

The Survey Assignments dialog window is also used to de-assign interviewers or surveys (to remove assignments either from the selected interviewers or from the selected surveys) - please refer to Performing De-assign operation in the Survey Assignments dialog window on page 178 for details.

To make assignments using the Survey Assignments dialog window:

1. Press the Survey Assignments button  in the top right frame toolbar.

   This will display the Survey Assignments dialog window.

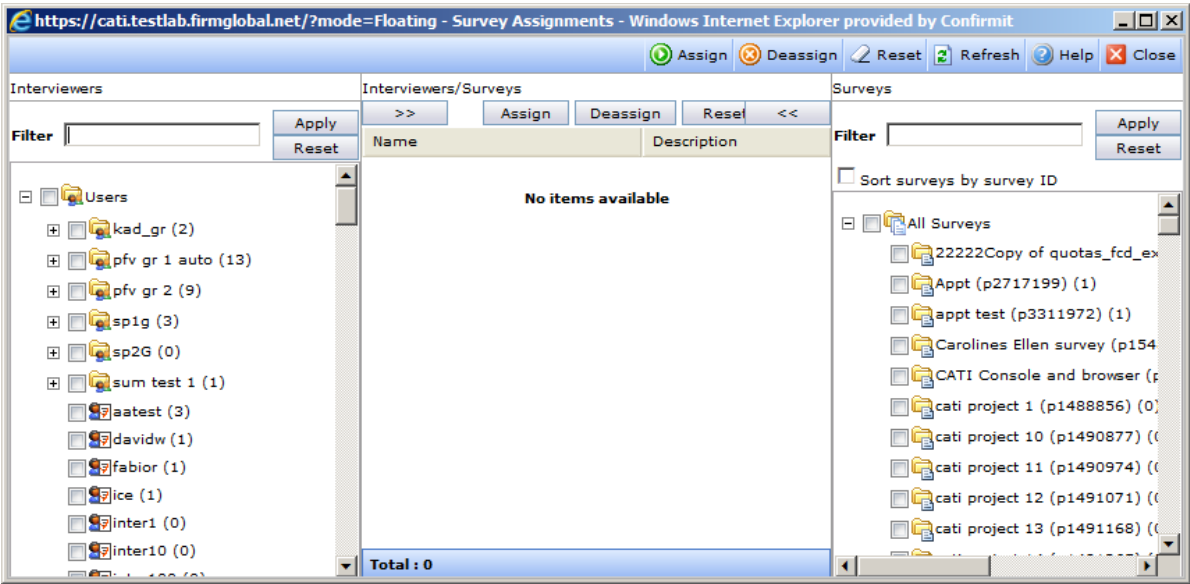


Figure 170 The Survey Assignments dialog window

2. The dialog window contains three frames and the toolbar above them.

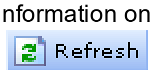
   The frames include:

   - **Interviewers** – left frame, lists the existing interviewer groups and interviewers included into these groups in the form of a hierarchical tree;
   - **Interviewers/Surveys** – middle frame, displays the list of either surveys or interviewers selected for assignment;
   - **Surveys** – right frame, lists the existing surveys in the form of a hierarchical tree.

3. Both Interviewers and Surveys frames provide you with information on the amount of currently assigned surveys/interviewers.

   Interviewers and interviewer groups displayed in the tree in the left frame are accompanied with information regarding the amount of surveys assigned to each of them. These numbers are shown in brackets after each item name. A pop-up prompt containing the same information appears each time you hover the mouse pointer over an item name in the list.

   Surveys and survey groups displayed in the tree in the right frame are accompanied with information regarding the amount of interviewers assigned to each of them. These numbers are shown in brackets after each item name. A pop-up prompt containing the same information appears each time you hover the mouse pointer over an item name in the list.

4. To view the most recent information on the amount of assignments for surveys and interviewers you should press the Refresh button 

   on the Survey Assignments dialog window toolbar.

   The Refresh operation helps keeping survey and interviewer lists in the current state – some surveys and/or interviewers can become unavailable for assignments, and, therefore, they should disappear from the list after the Refresh operation is performed.

5. The left (Interviewers) frame allows the required interviewers or groups of interviewers to be selected by checking the corresponding boxes.

   If the group is collapsed, you can unfold it by clicking the plus sign next to its name.

Bear in mind that selecting a group automatically selects all of the interviewers and groups included into the selected group.

You can search for the particular interviewer(s) by name by entering a search string in the Filter field and pressing the Apply button next to that field. This action will hide all the list items which names do not match the entered string. Press the Reset button beside the Apply button to clear the filter and reveal the complete interviewer list.

6. The right (Surveys) frame allows the required surveys or groups of surveys to be selected. This frame uses the same controls as the left (Interviewers) frame.
7. The middle (Interviewers/Surveys) frame is used to display items for which you start making assignments. It displays the selected interviewers (groups of interviewers), or surveys (groups of surveys) after you press the appropriate arrow button located at the top of this frame. First select the required interviewers or surveys in the appropriate frame. Press the arrow button next to the left side of the frame >> to populate the middle frame with the list of interviewers selected for assigning surveys to them. Or press the arrow button next to the right side of the frame << to populate the middle frame with the list of surveys selected for assigning interviewers to them.
8. In case you start assigning interviewer(s) to survey(s), you start with selecting interviewers in the left frame, and when the selection is formed press the arrow button on the left side of the middle frame. The middle frame is then refreshed, its name changes to Interviewers and the selected interviewer list is displayed in the middle frame.

   To help you doublecheck or reconfigure the selection the CATI Supervisor requires that you put ticks in front of items in the middle frame list.

   Next turn to the opposite (Surveys) frame, and select the required surveys in that frame in the same manner you already used for the list displayed in the Interviewers (left) frame.

   You can clear the selection completely and remove all items from the list in the middle frame. This can only be done **before** you perform the Assign operation itself. Press the Reset button in the top part of the middle frame, or press the Reset button Reset at the top of the Survey Assignments dialog window to do that. When the reset operation is performed, the middle frame refreshes and all selections are removed from this frame. You should create new selections to make assignments.

   To assign the selected interviewer(s) to selected survey(s) press the Assign button in the top part of the middle frame, or press the Assign button Assign at the top of the Survey Assignments dialog window to do that.

   If the Assign operation is performed successfully, the dialog box informing you of the operation completion is displayed. This dialog box tells you how many surveys were assigned or de-assigned in the course of the operation. Pressing OK in this dialog box closes it, and simultaneously clears the middle frame.
9. If assigning survey(s) to interviewer(s), you should first select survey(s) in the right frame, then, when the selection is formed, press the arrow button on the right side of the middle frame. The name of the middle frame changes to Surveys and the selected survey list is displayed in the middle frame.

   Other actions are performed similar to those described in step 8 above. The only difference is that you start with selecting surveys, and the middle frame in this case displays the list of selected surveys.
10. There is an alternative way of quickly assigning persons/groups to surveys and vice versa. This procedure is fast, and it requires no confirmation.

    To quickly assign an item (a group of items) to another item (a group of items) you must select the required persons/groups and surveys in both frames.

    Next you should simply drag the selected items from one frame to another (from the Interviewers to Surveys, or vice versa, the direction has no importance), point the cursor on any of the selected items in the opposite frame and drop the selection there.

    The CATI Supervisor module will create the assignment instantly in this case.

11. After the assignments are made we would recommend changing to the main CATI Supervisor window and checking the assignments for each survey by opening it in the View mode (see Viewing and modifying the survey assignments on page 66 for instructions).

    Also you can check the existing assignments in the Survey Assignments window by selecting and then double-clicking either the selected surveys or interviewers/groups (see Viewing survey and interviewer assignments in the Survey Assignments window on page 179 for this procedure description).

3.6.1.1 How to Make Assignments in the Survey Assignments Window - Quick Tips

Assignments can be made either by dragging and dropping interviewers/groups from the tree on the left to the tree on the right (Shift and Ctrl supported for multiple selections) or by using the 'clipboard' area between the two trees.

To use the clipboard select the interviewer/groups that you want to work with and click >> to add them to the clipboard, then select the survey(s) that you want to assign/deassign these users to and click on assign/deassign.

Similarly surveys can be assigned to users/groups by first moving the survey(s) into the clipboard using the << button, then selecting assign/deassign.

The clipboard can only contain either interviewers/groups or surveys, not a combination of the two.

Double click on a survey to populate the list with currently assigned users.

Double click on a user to populate the list with currently assigned surveys.

Please turn to the Related topics below for details regarding technique of work with the Survey Assignments window.

3.6.2 Adding and replacing assignments for a selected survey

You can assign interviewers and interviewer groups directly to the survey that you select in the survey list in the top right frame. This procedure is similar to that available on the Assignments tab of the Survey Properties view (see Viewing and modifying the survey assignments on page 66 for details). 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 context menu for any survey displayed in the survey list.

Assignments can be added or replaced for a single selected survey only.

To add interviewer assignments to the selected survey:

1. Open the list of surveys in the top right frame (see Viewing the survey list on page 59 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.

   Current procedure can only be used to add assignments to one survey at a time.

   This will display the Add Assignments dialog window.

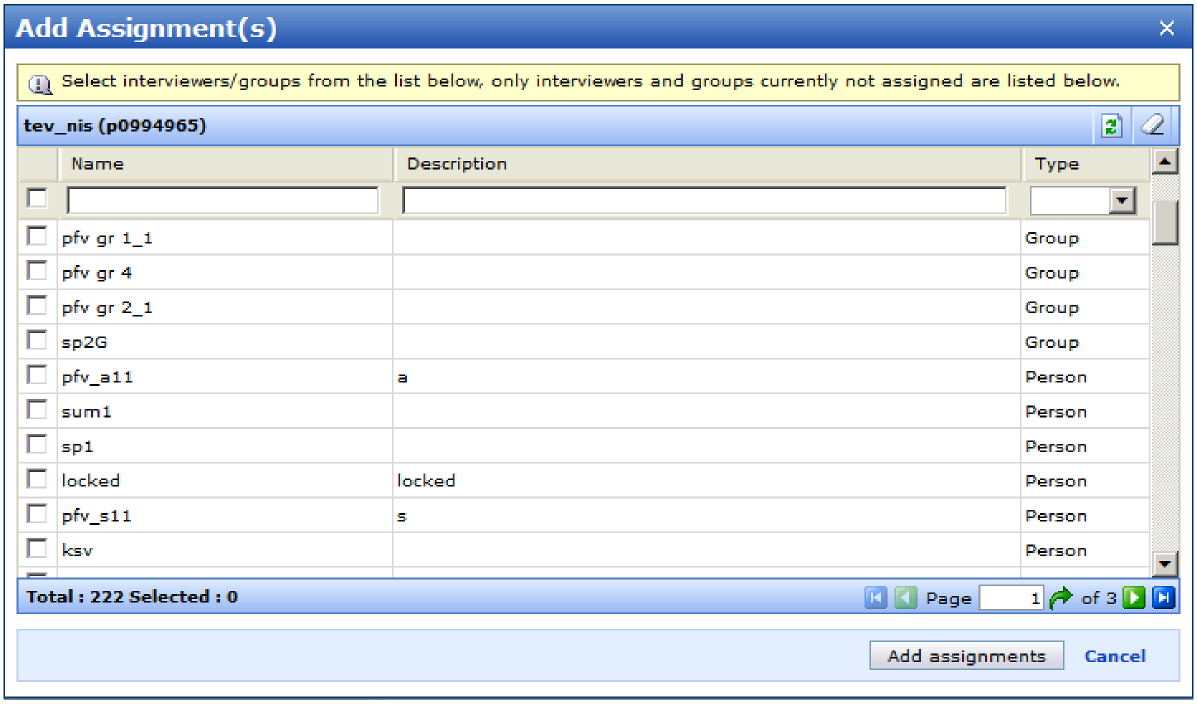


Figure 171 Selecting users and groups to assign to the survey

3. To assign an interviewer/interviewer group to the survey you should select the required interviewer/interviewer group from a list of Groups and Persons.

Mind that only interviewers and interviewer groups which are not currently assigned to the selected survey are listed here. You cannot remove the existing assignments using this dialog. To remove existing assignments you should use the technique described in Making assignments in the Survey Assignments dialog window on page 172 or in Viewing and modifying the survey assignments on page 66.

4. Press Add assignments to confirm the assignment when you are done selecting users/groups. This window will close, and the assignment will be modified.

To replace interviewer assignments for the selected survey:

1. Open the list of surveys in the top right frame (see Viewing the survey list on page 59 for instructions).
2. Right-click the required survey in the list in the top right frame and choose Replace Assignments from the context menu that appears.

   Current procedure can only be used to replace assignments for one survey at a time.

   This will display the Replace Assignments dialog window.

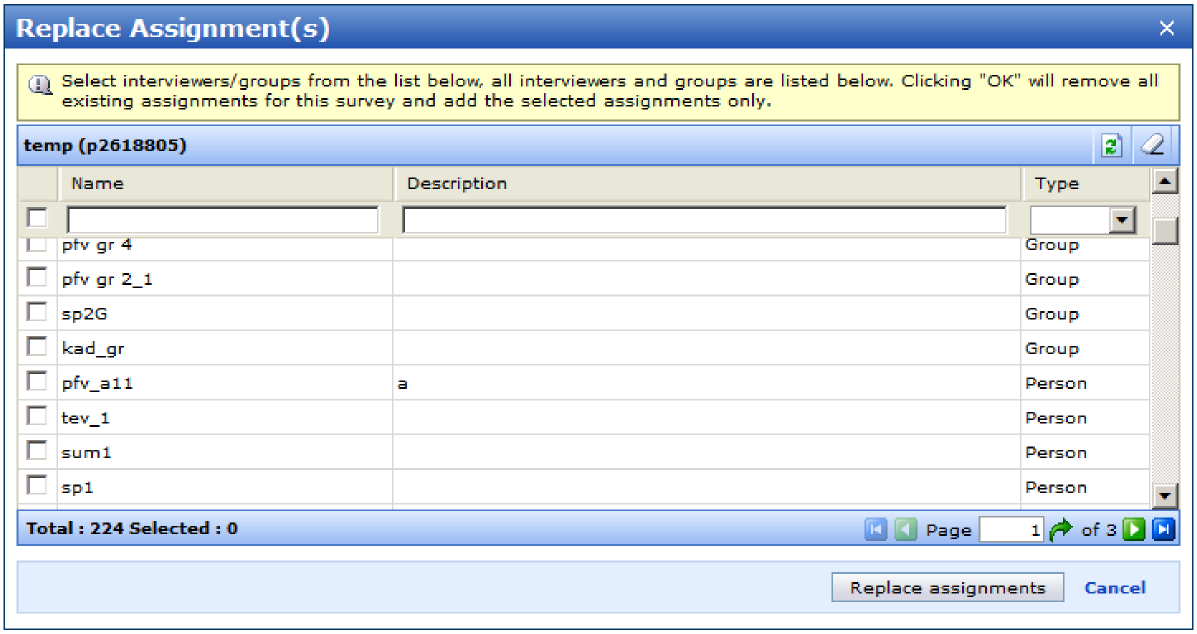


Figure 172 Replace survey assignments dialog window

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. Check a box in front of the required item and press Replace assignments in the bottom of the window to replace assignments.

3. CATI Supervisor displays the warning message, asking you to confirm the replacement action.

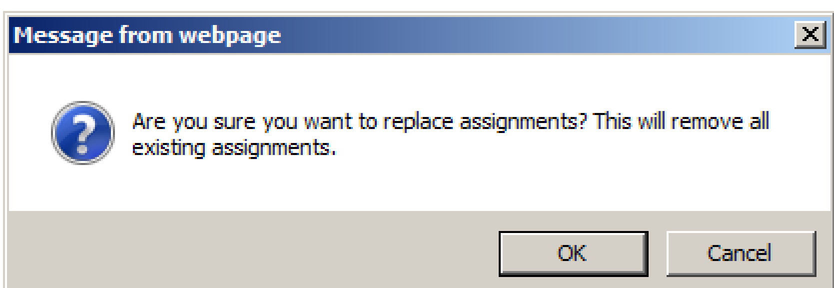


Figure 173 Warning message displayed on the attempt to execute the assignment replacement

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

4. You will notice that the Assignments tab refreshes, and the selected persons/groups appear in the list of the assigned person/groups in place of the previous assignment.

Please note that you can also add or replace assignments on the Assignment tab (survey View - refer to Viewing and modifying the survey assignments on page 66) or using the Survey Assignment dialog window interface (see Making assignments in the Survey Assignments dialog window on page 172for instructions).

3.6.3 Performing De-assign operation in the Survey Assignments dialog window

To make sure you perform De-assign operation precisely for the required persons or surveys we strongly recommend checking the assignments for each survey by opening it in the View mode (see Viewing and modifying the survey assignments on page 66 for instructions).

Procedures for performing De-assign operation are very similar to those performed for the Assign operation.

To perform De-assign operation in the Survey Assignments dialog window:

1. Press the Survey Assignments button  in the top right frame toolbar.

   This will display the Survey Assignments dialog window.

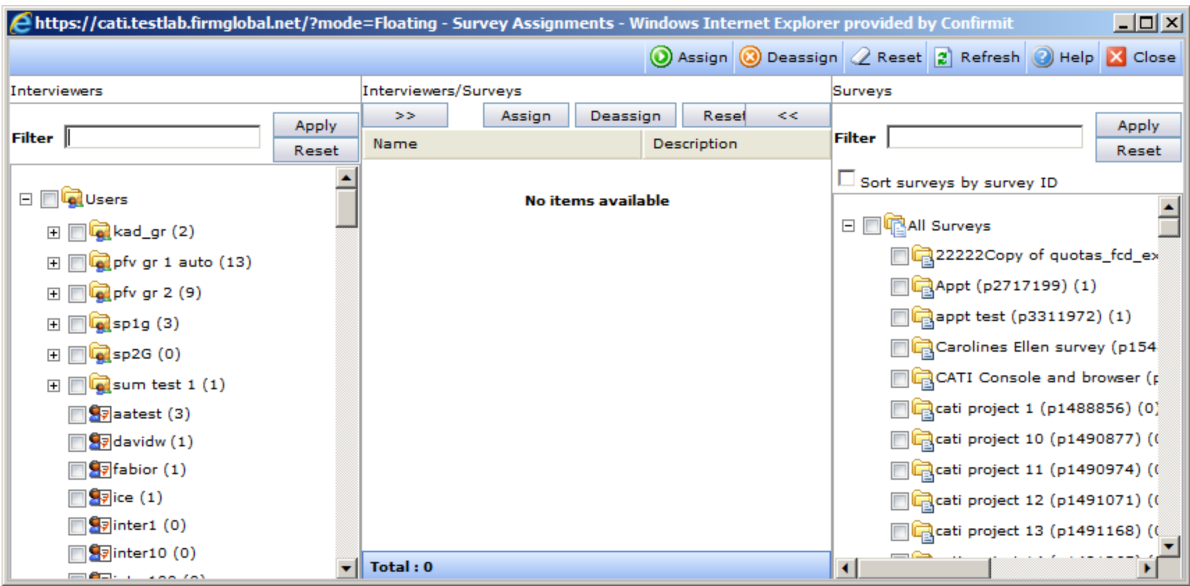


Figure 174 The Survey Assignments dialog window

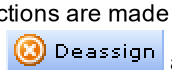
2. De-assign operation is performed in a similar way to the Assign operation.

   It requires selection of either persons or surveys for which you will perform it.

   Next, depending on what was you first selection, you should select surveys or persons to de-assign.

   All these actions are described in details in Making assignments in the Survey Assignments dialog window on page 172 section.

3. Please follow the procedure described in Making assignments in the Survey Assignments dialog window on page 172 section step by step to make the required selections.

   After the selections are made press the De-assign button in the top part of the middle frame, or press the De-assign button  at the top of the Survey Assignments dialog window to execute the De-assign operation.

   If the De-assign operation is performed successfully, the dialog box informing you of the operation completion is displayed. Pressing OK in this dialog box closes it and simultaneously clears the middle frame.

4. After the operation is completed, we recommend checking the results for each survey by opening it in the View mode (see Viewing and modifying the survey assignments on page 66 for instructions).

3.6.4 Viewing survey and interviewer assignments in the Survey Assignments window

Using the Survey Assignments window you can check the assignments made for a survey or for an interviewer or interviewer group.

The Survey Assignments dialog window allows viewing the total number of assignments existing for each person/group and for each survey. You can also view existing assignment details - which surveys are assigned to the particular interviewer/interviewer group, and, vice versa - which interviewers/interviewer groups are assigned to the particular survey.

Still this operation will not show the individual interview assignments, like, for example, a single interview assigned to the particular interviewer. Such individual interview assignments can be viewed either using the Assignments tab (when Interviewer properties are displayed in the bottom right frame - see Viewing and modifying the interviewer properties on page 37 for instructions), or using the Call Management window (when Scheduled or Active calls are listed in that window - see Viewing the interview/call list on page 110 for instructions).

To view survey and interviewer assignments in the Survey Assignments window

1. When the survey list is displayed in the top right frame (see Viewing the survey list on page 59 for details), press the Survey Assignments button  in the top right frame toolbar.

   This will display the Survey Assignments dialog window.

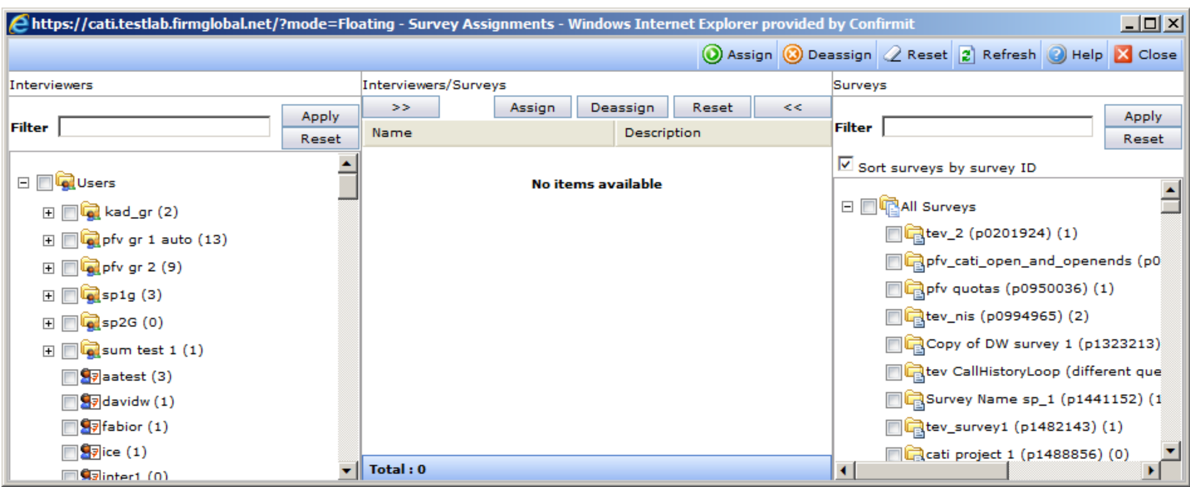


Figure 175 Survey Assignments dialog window

2. Depending on whether you need to view assignments made for a survey, or for an interviewer (interviewer group), you will have to do the following.

- To view assignments made for a survey double-click the required survey in the Surveys frame. The central frame will be populated with interviewers/groups assigned for the selected survey;

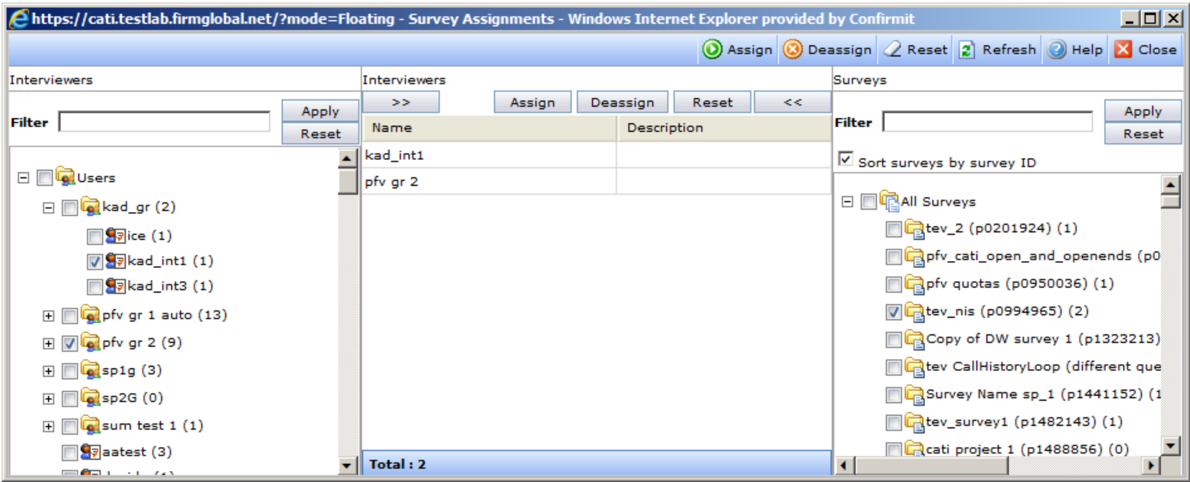


Figure 176 Survey Assignments dialog window showing assignments made for a survey

- To view assignments made for an interviewer/interviewer group double-click the required interviewer in the Interviewers frame. The central frame will then be populated with surveys assigned for the selected interviewer/interviewer group.

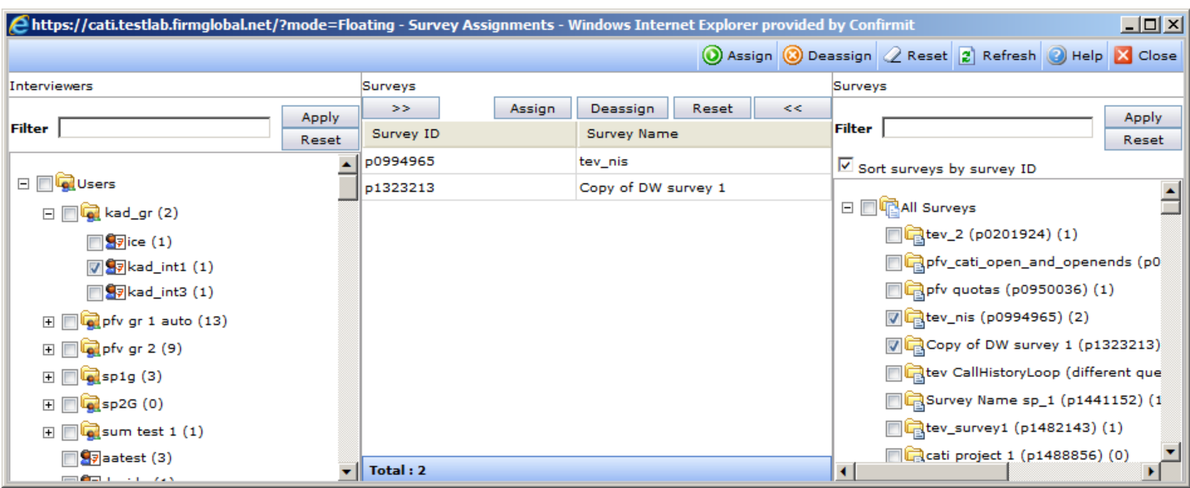


Figure 177 Survey Assignments dialog window showing assignments made for an interviewer/interviewer group

3. To clear the central frame press the Reset button located above the list in the central frame.

3.7 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.

3.8 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.

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 The Default and Current Call Centers on page 188 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 press the Export call history button on the frame toolbar.
3. The Export Call History Data dialog window is displayed then.

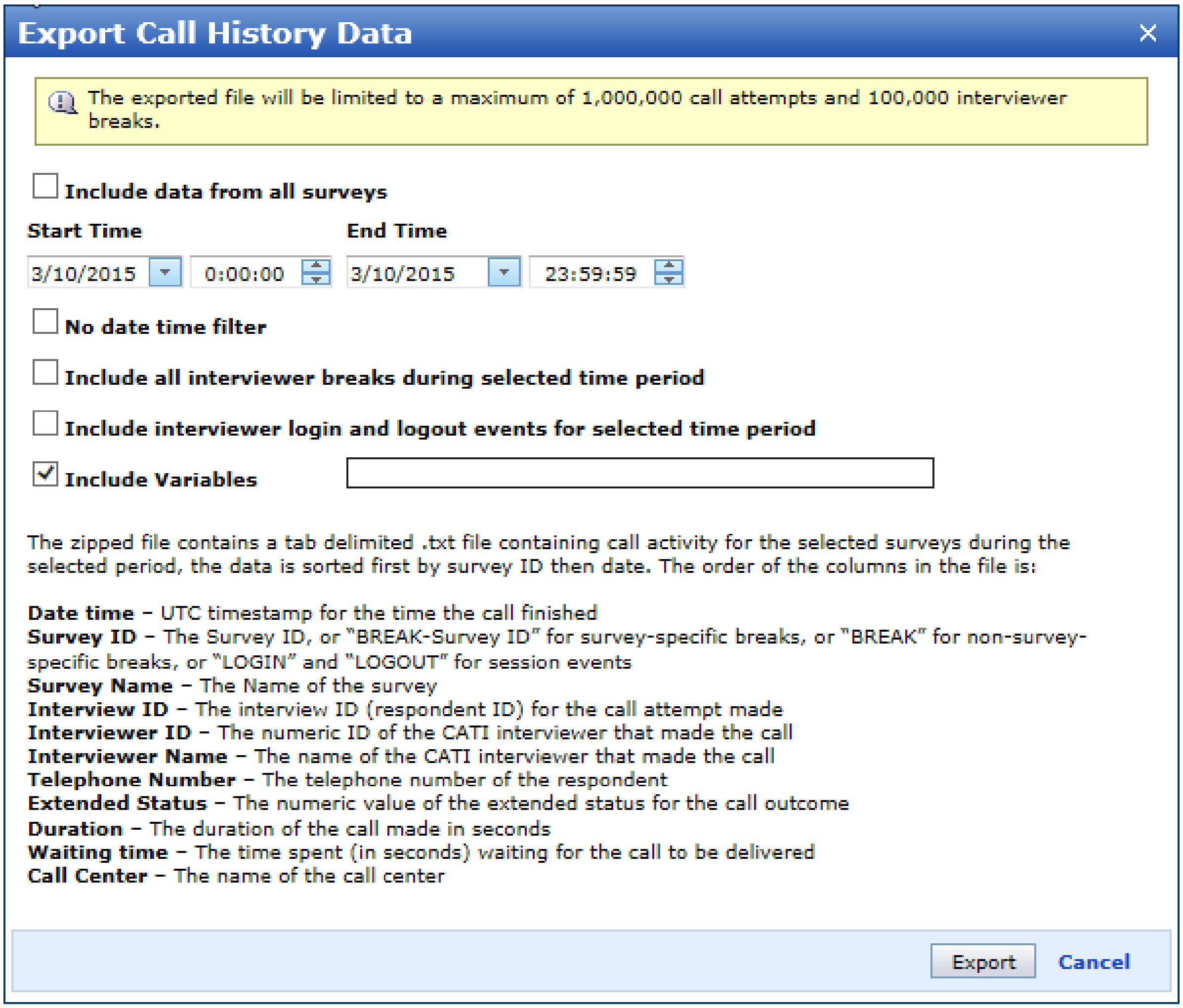


Figure 178 Selecting options for the call history data export

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 please 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 (please see Setting the selected Active Timezone as local on page 364 for procedure description). 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 press 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, please 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 (see the Selecting options for the call history data export on page 182 illustration above).
6. Press 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

This chapter is intended only for supervisors who are granted the "administrator" rights: it deals with instructions concerning objects which are inaccessible for "normal" CATI supervisors.

We suggest studying the concept of Call Centers closely since it lays the basis for organization and management of other objects used in CATI Supervisor module. We also suggest referring to What is a Call Center in CATI Supervisor terms on page 187 topic for general description of the Call Center object.

Some CATI supervisors are granted the "administrator" rights. Such persons are in charge of managing Call Centers and administering activities of normal supervisors.

Granting of the "normal" and "administrator" CATI Supervisor rights is carried out in the Confirmit Authoring module: please refer to the corresponding section in the Confirmit Authoring manual for instructions.

One of the main tasks of the supervisor with administrator rights is to manage Call Centers and organize the work of "normal" supervisors. Call Center management operations are required to make possible the work of the "normal" supervisors: supervisor-"administrator" assigns "normal" supervisors to a call center and activates surveys in this call center thus creating a possibility for "normal" supervisors to work in the system. "Normal" supervisors cannot exist outside some call center and cannot operate if no survey is assigned to this call center. "Normal" supervisors create interviewers within the framework of the call center they are assigned to. These interviewers then can be assigned to surveys which were activated by the supervisor-"administrator" for this particular call center.

Persons who are granted the CATI supervisor "administrator" rights can exclusively access certain CATI Supervisor module objects. These include the Call Centers object, and two extra Resources objects: Management and Database Update Logs. These objects cannot be accessed by "normal" supervisors. Also, interviewers' tasks available from the Tasks command (in the Resources menu) for the "administrator" will include tasks for all interviewers existing for the current company (in case of a "normal" supervisor this list is limited to the tasks performed by interviewers assigned to "his" surveys and interviews only).

Supervisor-administrator has the right to perform the following tasks:

- create and delete call centers;
- assign supervisors to call centers;
- activate (deactivate) surveys in call centers;
- observe activity of each interviewer logged into the system;
- monitor each task (both in progress and completed) initiated by any interviewer in the company. Administrator can also abort any task in progress.

There is certain difference in the way "normal" and "administrator" supervisors see object lists. Normal CATI supervisor can see only items pertaining to the call center they are assigned to: surveys activated in their call center and all items related to these surveys (some object lists, like Interviews or Scheduling Scripts, may be filtered differently, please refer to corresponding topics in this section). Administrator supervisor can see and access items pertaining to all call centers without restrictions.

For supervisor who was granted the "administrator" rights the Navigation menu (the left frame in CATI Supervisor application) will look like this.

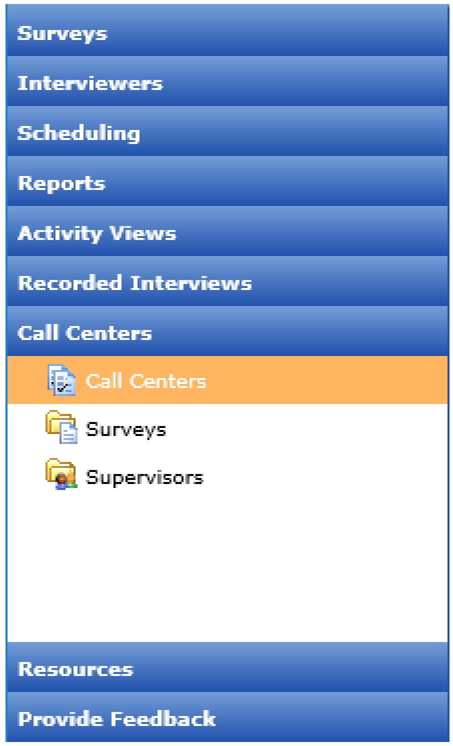


Figure 179 Navigation menu containing the Call Centers object

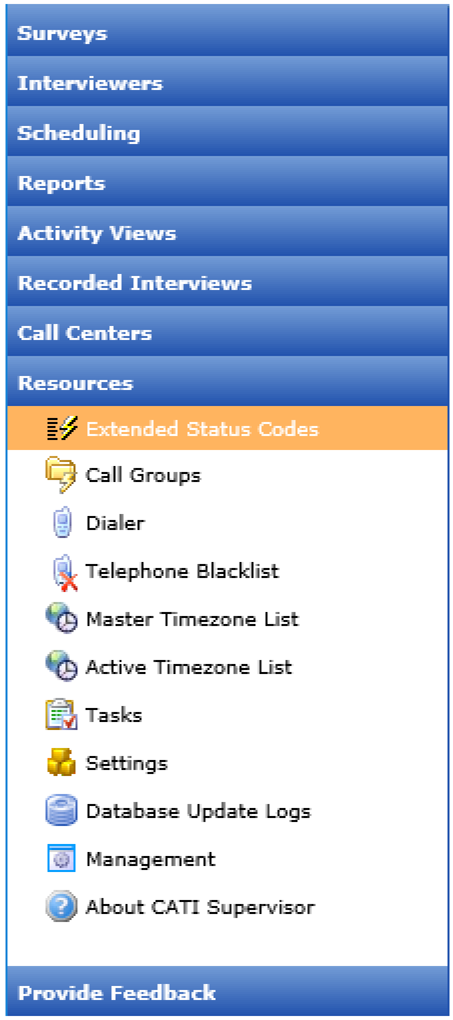


Figure 180 Navigation menu showing the extended Resources object

Therefore, we can consider a Call Center in CATI Supervisor as a virtual combination of a group of supervisors working with a group of surveys and a group of interviewers. Please refer to What is a Call Center in CATI Supervisor terms on page 187 for more information regarding Call Centers.

All interviewers that are created in the system by any supervisor are created strictly within the Call Center which the Supervisor is assigned to at the moment of the interviewer creation.

4.1 What is a Call Center in CATI Supervisor terms

A Call Center in CATI Supervisor module is a certain 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 Call Management on page 109) - 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 Deferred monitoring in CATI Supervisor on page 315);
- 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.

Please 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 appear hidden from him although they belong to the same call center as this supervisor himself does (please refer to Survey management on page 59 for explanation). Data relevant to such "hidden" surveys will not be used for generating reports and activity views.

Therefore, we can define a Call Center in the following way. ***A Call Center in CATI Supervisor module terms defines a separate group of supervisors who manage the work of a unique group of interviewers and the certain 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 in the top frame of CATI Supervisor module window like in the picture below. This section displays the name of the currently logged in supervisor and the name of the call center he is assigned to - this call center is considered CURRENT for this supervisor.

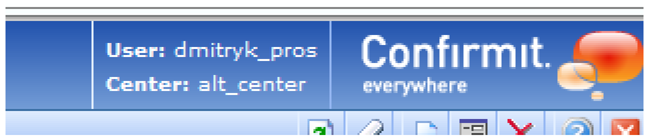


Figure 181 CATI Supervisor module top frame displaying the user name and the current call center name

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.

Please mind 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 Creating and editing a Call Center on page 193 for instructions);
- Delete Call Centers (see Deleting a Call Center on page 196 for instructions);
- Activate surveys in particular Call Centers (see Activating surveys in Call Centers on page 198 for instructions);
- Assign supervisors to particular Call Center (see Managing supervisors on page 192 for instructions).

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

4.2.1 Viewing the list of Call Centers

To perform operations with the Call Centers object you should start with browsing the Call Center list.

To view the Call Center list:

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.

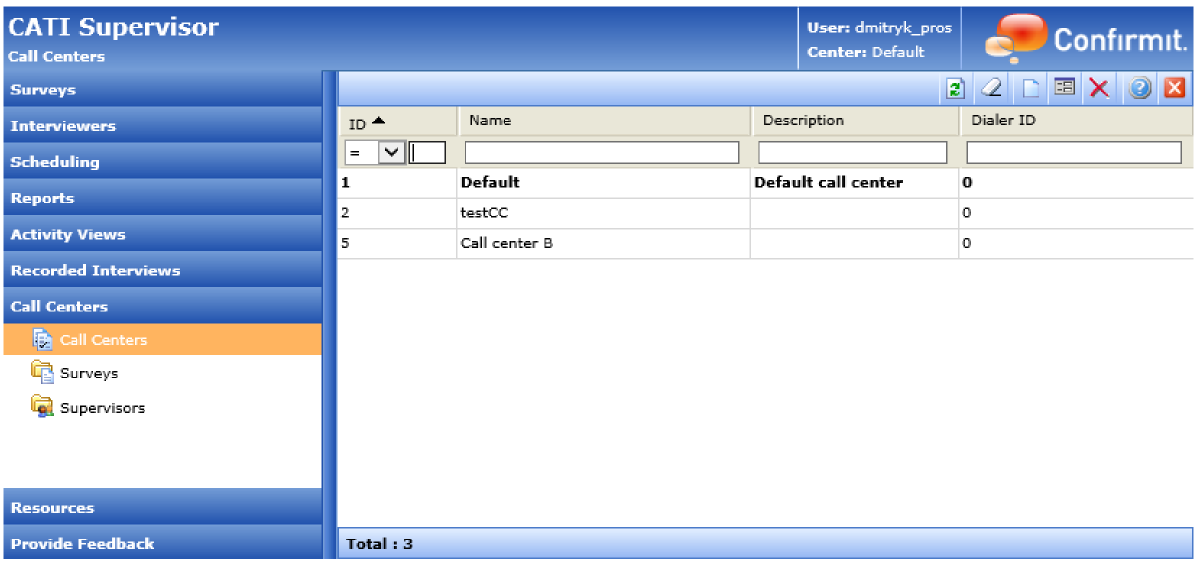


Figure 182 The list of Call Centers displayed in the top right frame

3. The user can perform the following operations with Call Centers:
   - Create and edit Call Centers (see Creating and editing a Call Center on page 193 for instructions);
   - Delete Call Centers (see Deleting a Call Center on page 196 for instructions);
   - Activate and deactivate surveys in Call Centers (see Activating surveys in Call Centers on page 198 and Deactivating surveys on page 200 for instructions);
   - Assign supervisors to particular Call Center (see Managing supervisors on page 192 for instructions).

   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).
4. 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 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
CLOSE WINDOW	Closes the CATI Supervisor dialog window

4.2.2 Viewing the list of activated surveys

To activate or deactivate a survey you should start with 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. This will unfold the menu available for the Call Center object.
2. Choose the Surveys tab. This will display the list of all currently activated surveys. This list is displayed in the top right frame of the CATI Supervisor main window.

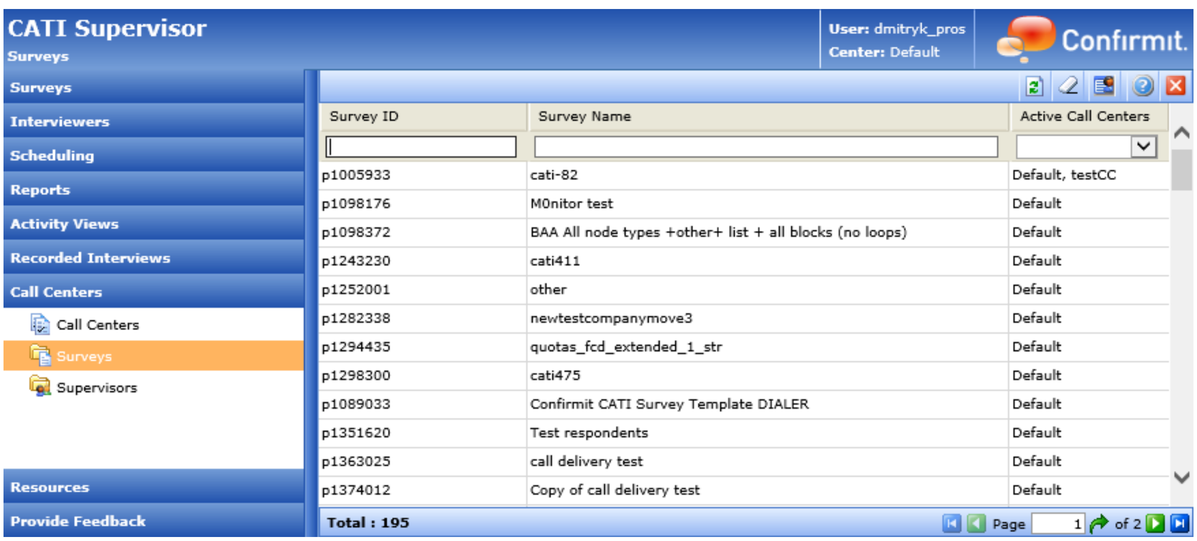


Figure 183

3. The user can perform the following operations with activated surveys:

- activate the selected survey in the call center (or in a number of call centers) - see Activating surveys in Call Centers on page 198 for instructions;
- deactivate the selected survey in the call center (or in a number of call centers) - see Deactivating surveys on page 200 for instructions.

  Operations are performed by either 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).

4. 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
	CLOSE WINDOW	Closes the CATI Supervisor dialog window

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 CATI Supervisor module (granting of these rights is done by means of the Confirmit Authoring module - please 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 a 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 right frame of the CATI Supervisor application window.

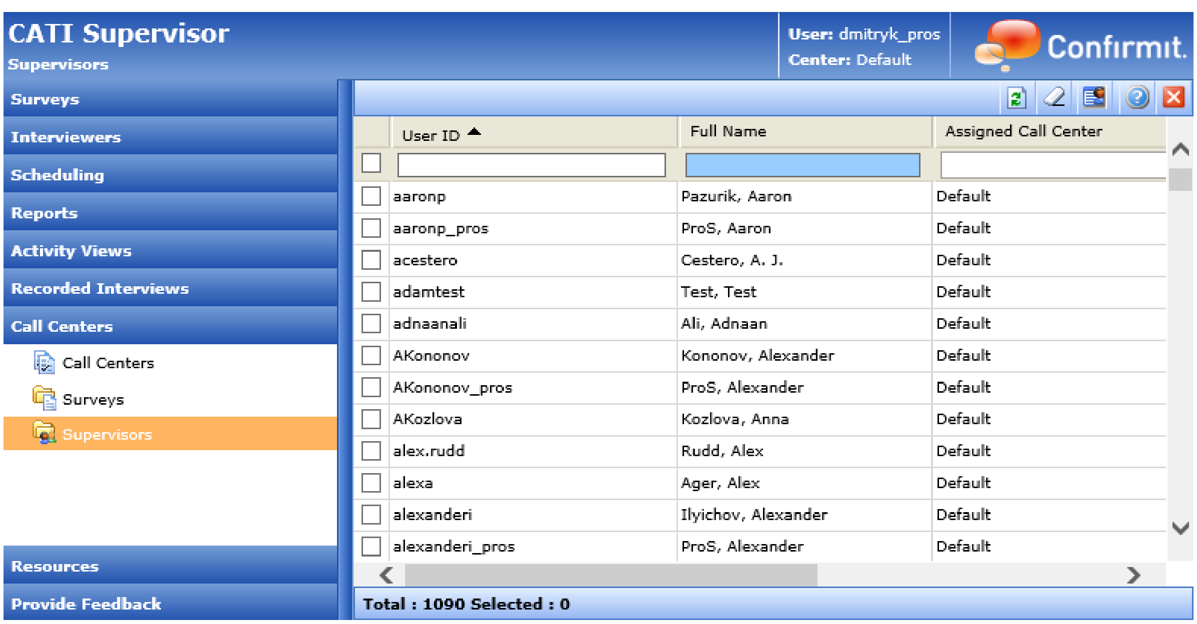


Figure 184 Browsing the supervisor list

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 press the Assign Supervisor button  on the frame toolbar.

   This will display the Assign Supervisor dialog window.

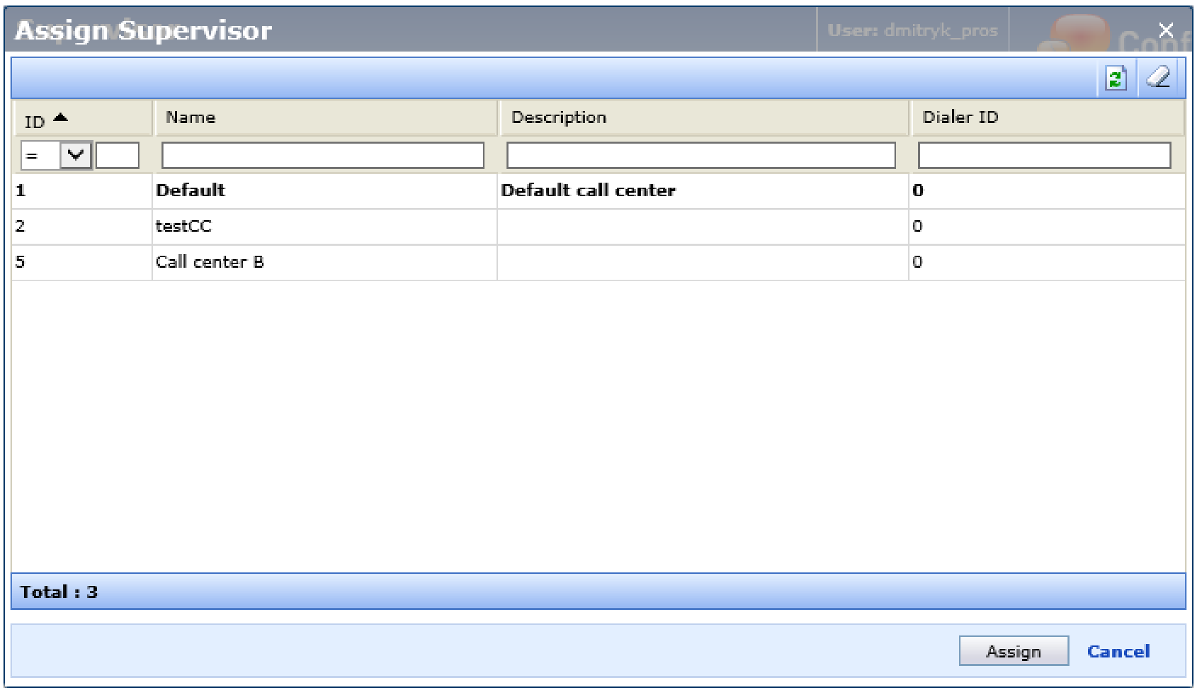


Figure 185 Assigning supervisor to a call center

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. Press 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 The Default and Current Call Centers on page 188). And you can edit or delete any created Call Center at a later time.

To create a Call Center

1. Display the list of Call Centers (see Viewing the list of Call Centers on page 190). The list is displayed in the top right frame and looks like this.

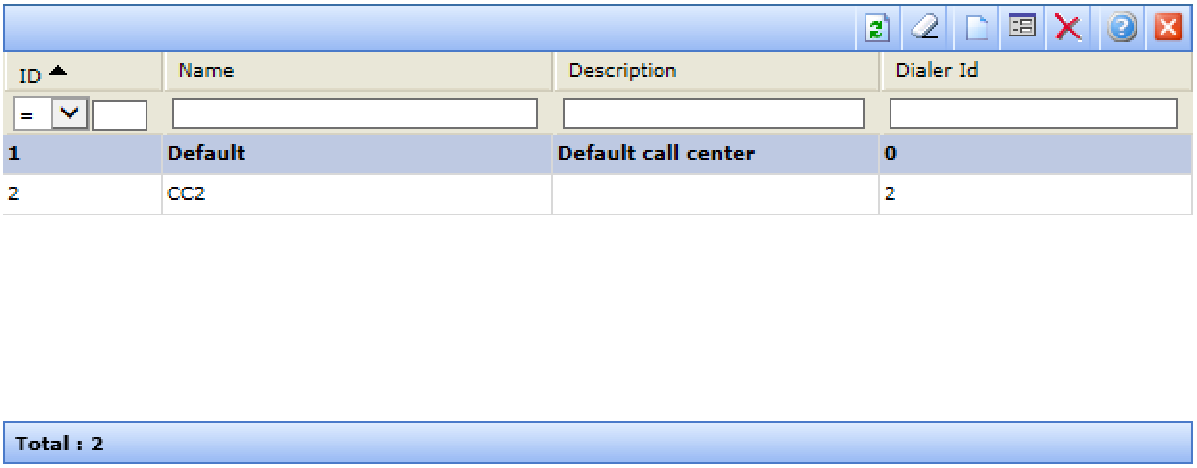


Figure 186 The list of Call Centers displayed in the top right frame

2. Press 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 dialog window.

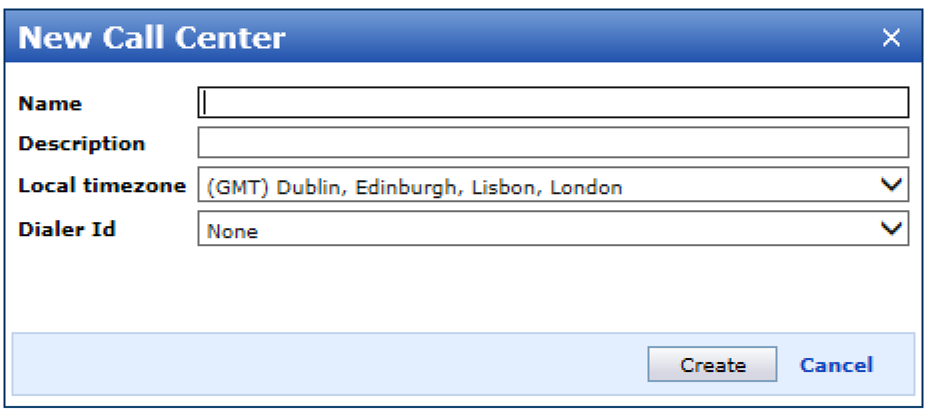


Figure 187 The New Call Center dialog window

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. Note that if 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).

Press 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 Viewing the list of Call Centers on page 190). The list is displayed in the top right frame and looks like this.

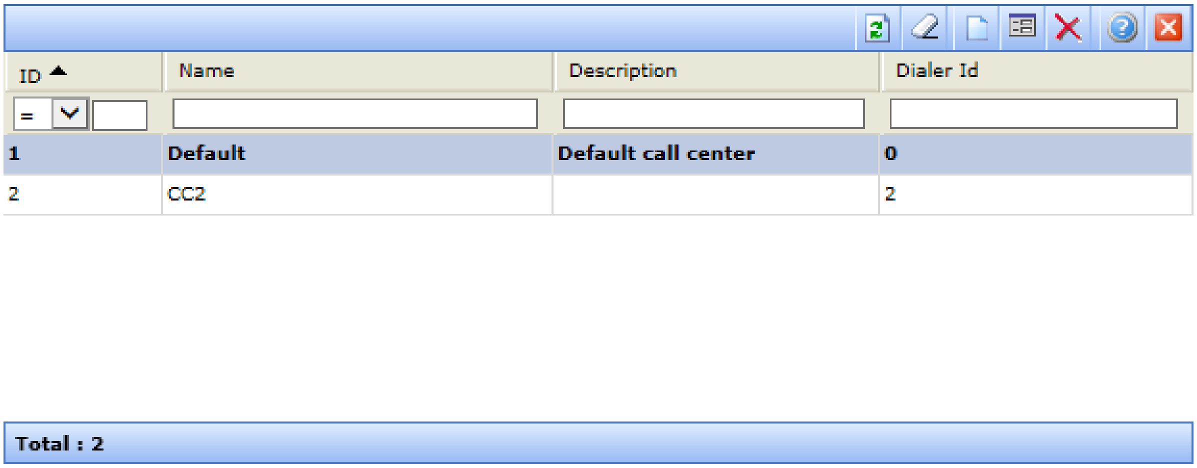


Figure 188 The list of Call Centers displayed in the top right frame

2. Right-click the Call Center you want to edit in the list and choose Properties from the context menu that appears, or press the Properties button on the frame toolbar. This will display the Call Center Properties dialog window.

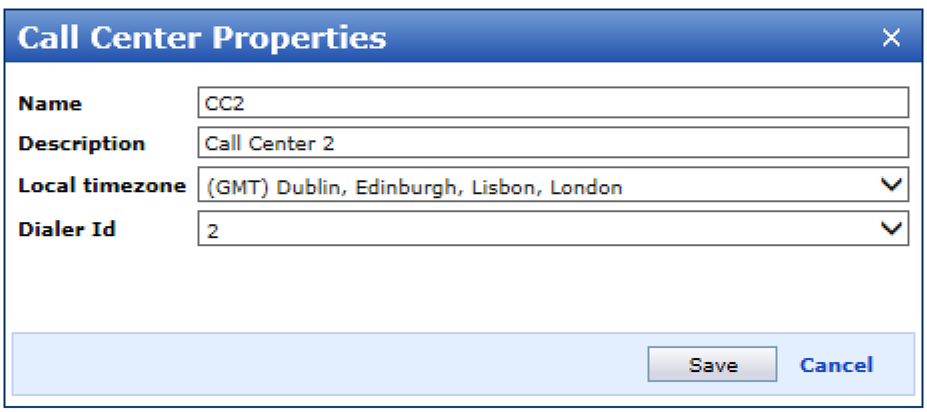


Figure 189 Call Center Properties dialog window

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 following warning message.

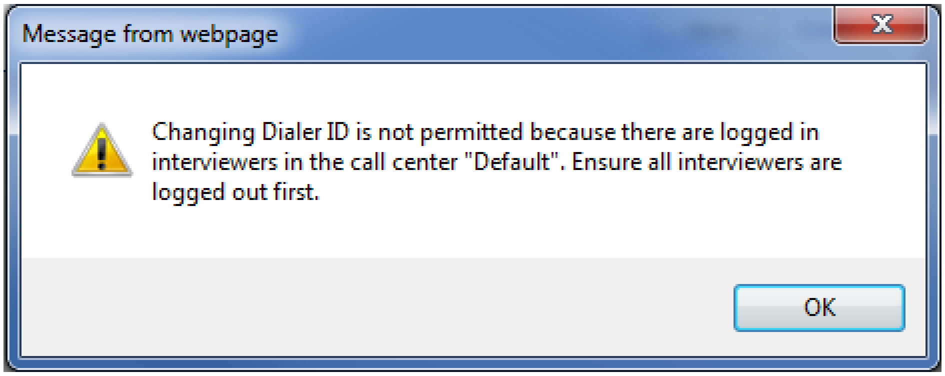


Figure 190 Changing Dialer ID while there are interviewers logged in

Press OK to close the message window. The Dialer ID IS NOT changed.

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 belonging to that Call Center who is currently logged in. Make sure that all interviewers belonging to that Call Center are logged out: then it is safe to change the Dialer ID.

Press Save to save the edited Call Center properties or Cancel to close the window without editing a Call Center.

3. The edited Call Center retains its ID.

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.

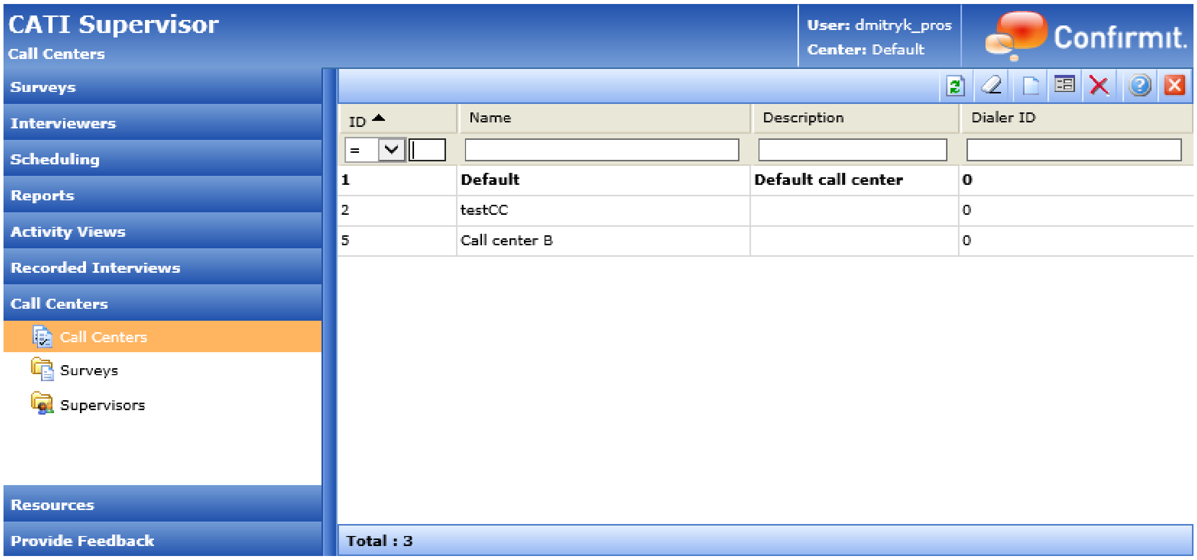


Figure 191 Displaying the list of call centers

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 press the Delete button on the frame toolbar. This will display the Delete Call Center dialog window.

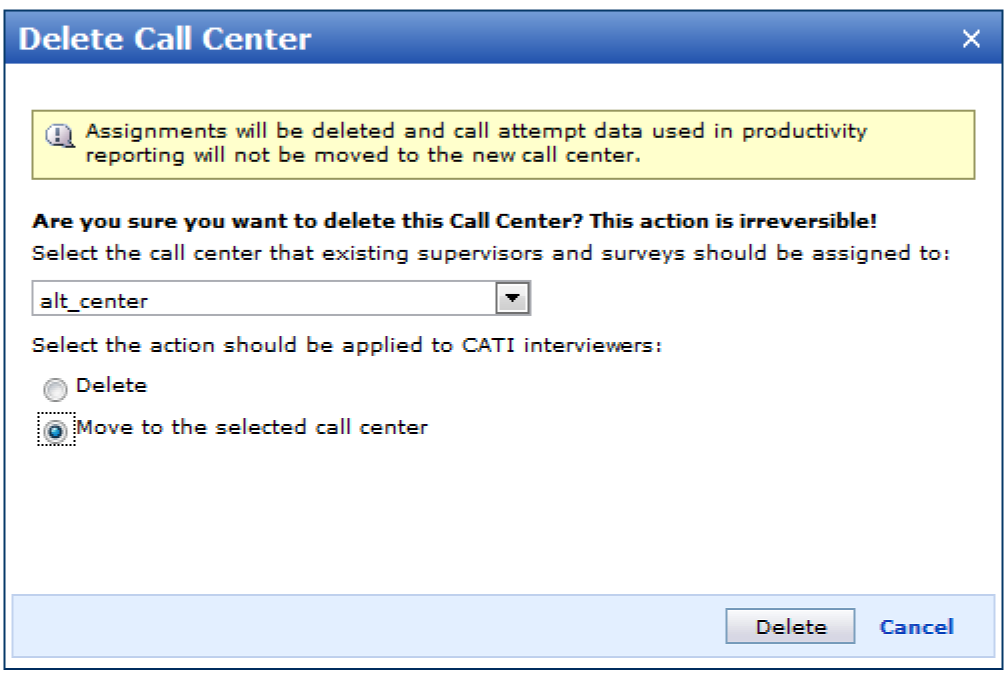


Figure 192 Configuring the deletion of a call center

In the drop down list select the 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. Press Delete to proceed with call center deletion (or press 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 (please 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 The Default and Current Call Centers on page 188). 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.

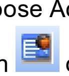
The procedure described below is used to activate a survey in any number of call centers from those available at the moment. Only one survey can be activated at a time.

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 press the Activate in Call Centers button  on the frame toolbar.

   This will display the Activate in Call Centers dialog window.

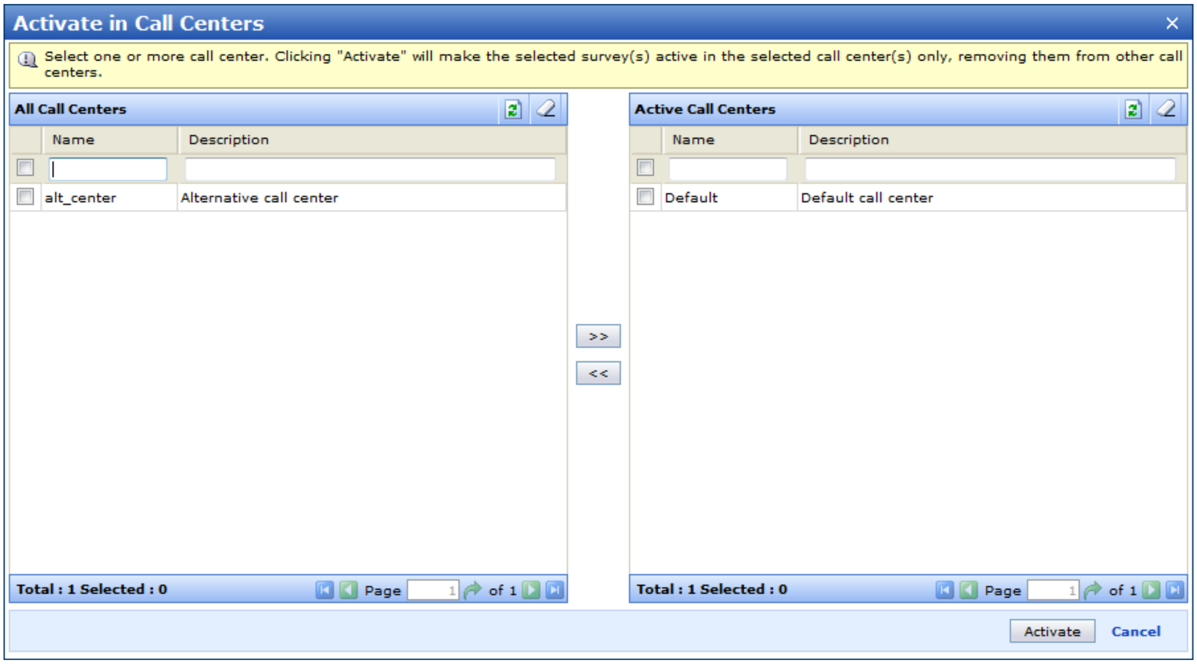


Figure 193 Activating survey in a Call Center

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 press 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. It is indicated in the corresponding section in the top frame of the CATI Supervisor module (see picture below).

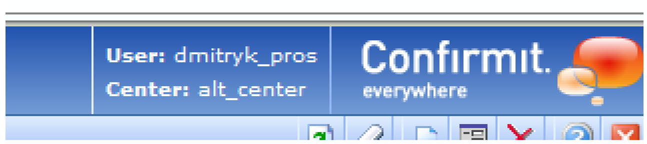


Figure 194 Information section in the top frame indicating the user name and call center name for the currently logged-in supervisor

5. To confirm your choice and activate the chosen surveys press 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 Deactivating surveys on page 200. After the call centers for activation and deactivation procedures have been selected, press 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 Activating surveys in Call Centers on page 198 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 press the Activate in Call Centers button  on the toolbar.

   This will display the Activate in Call Centers dialog window.

   in Call Centers dialog window.

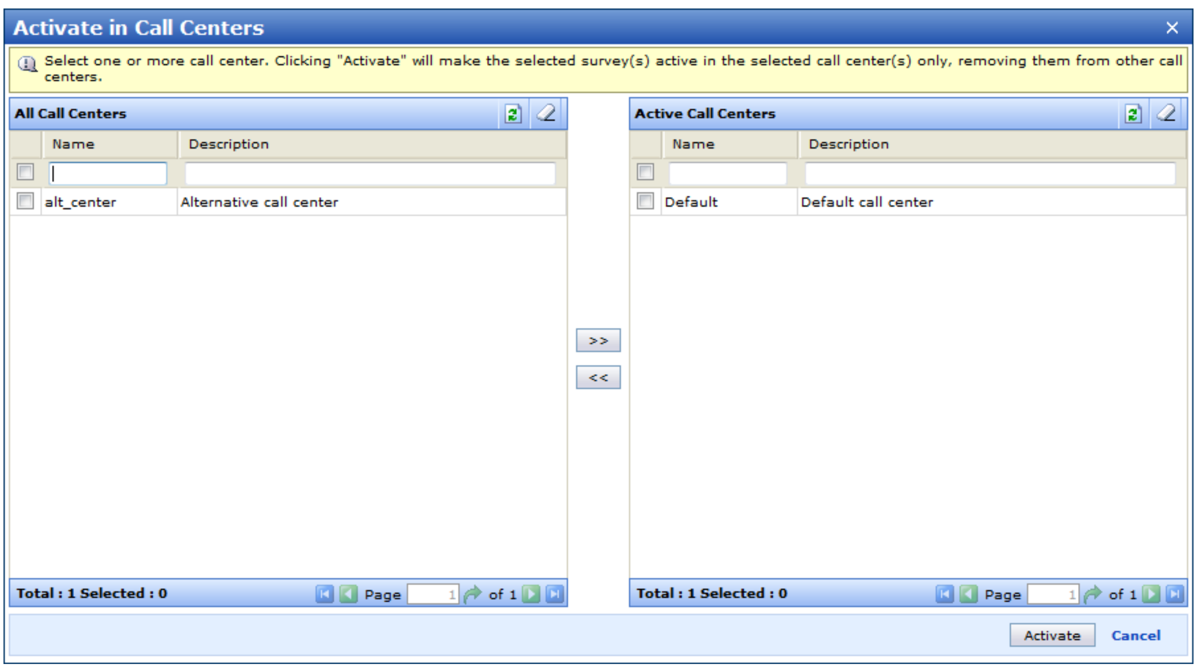


Figure 195 Deactivating survey in a Call Center

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 press 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 press 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) the following warning message will be displayed.

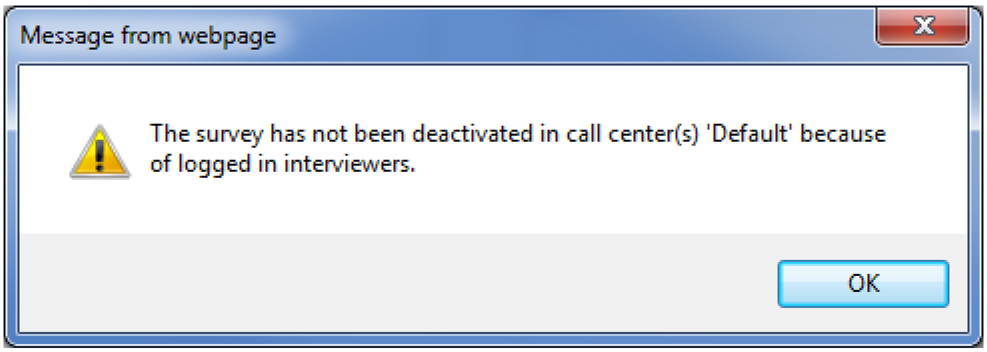


Figure 196 Deactivating a survey while there are interviewers working with this survey

Press OK to close this message. The survey IS NOT deactivated.

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 Activating surveys in Call Centers on page 198. After the call centers for activation and deactivation procedures have been selected, press 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 the 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 CATI Supervisor (see Viewing and modifying general properties of a survey on page 63). 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.

In fact any rule in a scheduling script acts like a container which groups a number of subrules. This helps to maintain the order in which rules are executed, and makes subrule management more convenient.

A subrule 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 subrules
- **Subrules** – 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 the 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 perform operations with Scheduling Scripts the user should navigate to the Scheduling object type with the help of the Navigation Menu displayed in the CATI Supervisor module left frame.

All operations can be performed on the particular object, which exists in the list of the Scheduling Scripts. The list of the Scheduling Scripts is displayed in the top right frame.

To view the list of the Scheduling Scripts:

1. Click the Scheduling button in the Navigation menu (which is displayed in the left frame)
2. In the list that unfolds below:
   - Either double click the Scheduling Scripts item, or
   - Right-click the Scheduling Scripts item and choose List from the context menu that appears.

   This will display the list of all currently available Scheduling scripts in the top right frame.

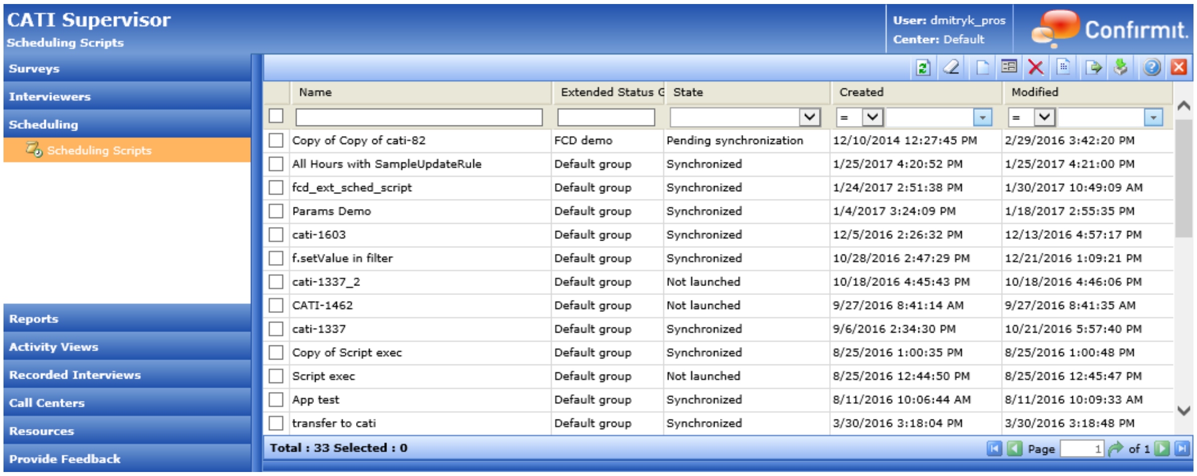


Figure 197 The Scheduling Script list

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:

1. View and modify the scheduling script settings;
2. Rename the scheduling script;
3. Create a new scheduling script;
4. Export the scheduling script definition;
5. Import the scheduling script definition;
6. Delete scheduling script.

   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 right frame and allows them to be modified
	RENAME	Displays the Rename dialog, allows editing the scheduling script name
	NEW SCRIPT	Allows creating a new scheduling script
	EXPORT HISTORY LIST	Exports the definition of all selected scheduling scripts in XML format
	DELETE	Deletes all selected scheduling scripts
	EXPORT	Exports descriptions of any existing scheduling script in the XML format
	IMPORT	Allows importing a description of a scheduling script in the XML format
	CLOSE WINDOW	Closes the CATI Supervisor dialog window

5.2 Creating a new Scheduling Script

To create a new Scheduling Script:

1. A new Scheduling Script creation procedure can be started in either of three ways:
   - by right-clicking the Scheduling Script object item in the Navigation menu (the Scheduling item), and choosing New Script from the context menu;
   - by right-clicking any row in the Scheduling Script list (in the top right frame), and choosing New Script from the context menu;
   - by pressing the New button in the title bar of the object list grid (in the top right frame).
2. Any of the above listed actions brings up the New Script dialog window, which you will use to specify parameters of the scheduling script you create.

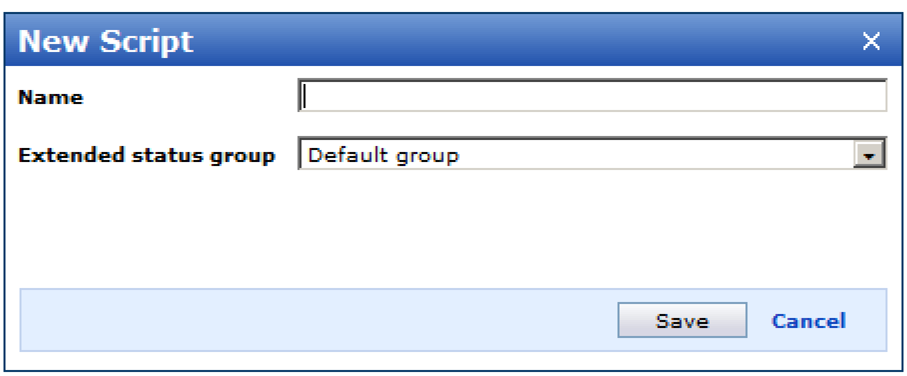


Figure 198 The New Script dialog window

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 Configuring the Extended Status Codes on page 327 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. Press Save to add a new script to the scheduling script list.
6. The scheduling script you create this way needs to be configured. To configure a scheduling script you will have to modify its settings - see Modifying the existing Scheduling script settings on page 207 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 rename an existing Scheduling Script:

1. You can rename any of the scripts displayed in the list in the top right frame. To do this either right-click the script and choose Properties from the shortcut menu, or select the required script in the grid and press the Properties button on the toolbar.

   This will display the Script Properties dialog window.

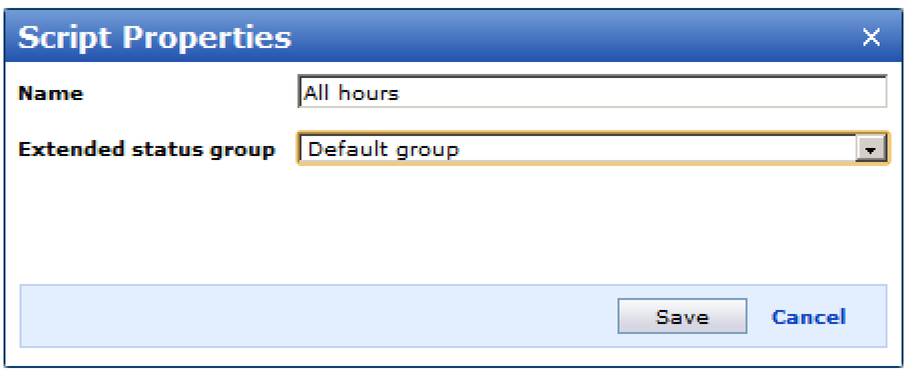


Figure 199 Renaming the scheduling script

   You can modify the script name displayed in the Name field.
2. Press Save to save changes, or Cancel to discard changes.

To change the extended statuses group which is currently used with the script:

1. You can change the extended statuses group which is currently used with the script. To do this either right-click the script name in the Scheduling script list and choose Rename from the shortcut menu, or select the required script in the grid and press the Rename button on the toolbar.

   This will display the Script Properties dialog window.

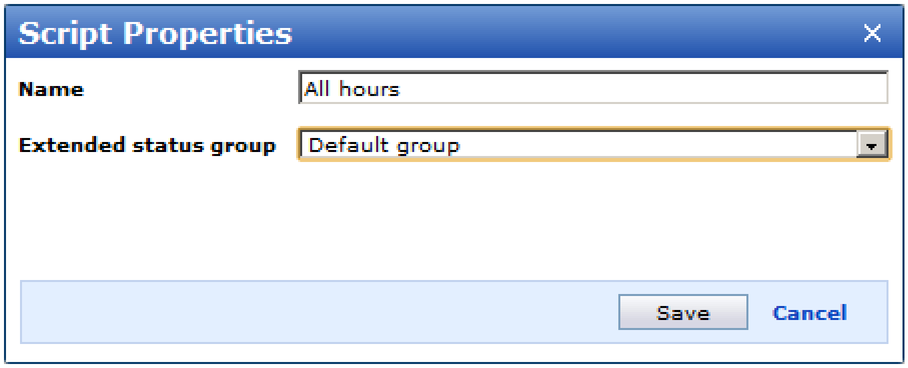


Figure 200 Changing the extended statuses group currently used with the script

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 Configuring the Extended Status Codes on page 327 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 subrules for this scheduling script (see Specifying scheduling script rules on page 214).

Information regarding the extended statuses group is neither exported, nor imported along with the scheduling script.

2. Press Save to save changes, or Cancel to discard changes.

5.4 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.

For instructions on how to configure scheduling script rules and subrules using the Rules tab interface please refer to Specifying scheduling script rules on page 214.

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 right frame.
2. Next either right-click the required script in the list of scheduling scripts in the top right frame and choose View from the shortcut menu, or select the required script in the grid and press the View button  on the toolbar.

   This will display the selected script settings in the bottom right frame.

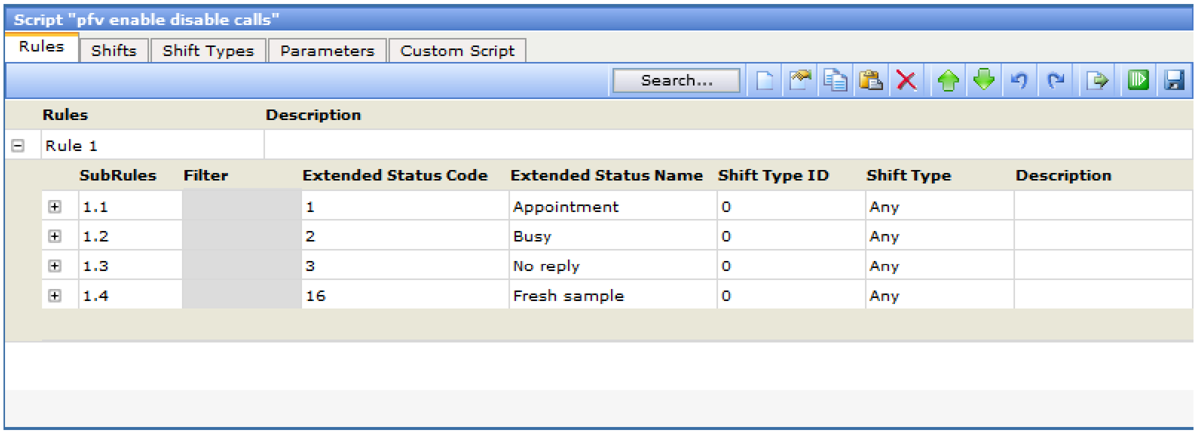


Figure 201 Viewing the script settings in the bottom right frame

2. The bottom right frame uses tabbed interface to display the scheduling script settings. You can use tabs to view and modify the following script settings:
   - Rules – this tab is used for specifying rules to be applied to the call. Refer to Specifying scheduling script rules on page 214 for details;
   - Shifts – this tab is used for specifying shifts during which the script should be active. Refer to Specifying shifts and exclusions for use with the scheduling script on page 210 for details;
   - Shift types – this tab is used for specifying shift types (shift types are required for correct specification of the shifts). Refer to Specifying the shift (exclusion) type on page 208 for details;
   - Parameters - this tab is used for managing parameters which can be used with any action added to the script. Refer to Parameterized scheduling scripts on page 218 for details;
   - 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 subrule). Refer to Writing a custom scheduling script code on page 222 for details.
3. The toolbar in the frame title bar contains the selected scheduling script name and a set of controls different for each tab.

   Please refer to Modifying the existing Scheduling script settings below for the detailed description of the script modification procedure. This chapter describes actions required to correctly modify script settings in each tab, and the order in which these actions should be performed.

5.5 Modifying the existing Scheduling script settings

The scheduling script settings include specifications of the time period (or “shift” in 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. Please see Configuring the Master Timezone list on page 360 and Configuring the Active Timezone list on page 362 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.

More information and detailed instructions on configuring shifts and exclusions used with the scheduling script can be found in Specifying shifts and exclusions for use with the scheduling script on page 210.

The other important scheduling script parameter is a set of rules, which describe the interview states that trigger the script. Rules consist of subrules 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 subrule 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 instantly scheduled for execution according to the specified rules.

Please refer to the following sections for descriptions of script configuration procedures related to the appropriate tabs.

5.5.1 Specifying the shift (exclusion) type

Please 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 on page 206 for details), choose the Shift Types tab in the bottom right frame. This will display the list of existing shift and exclusion types.

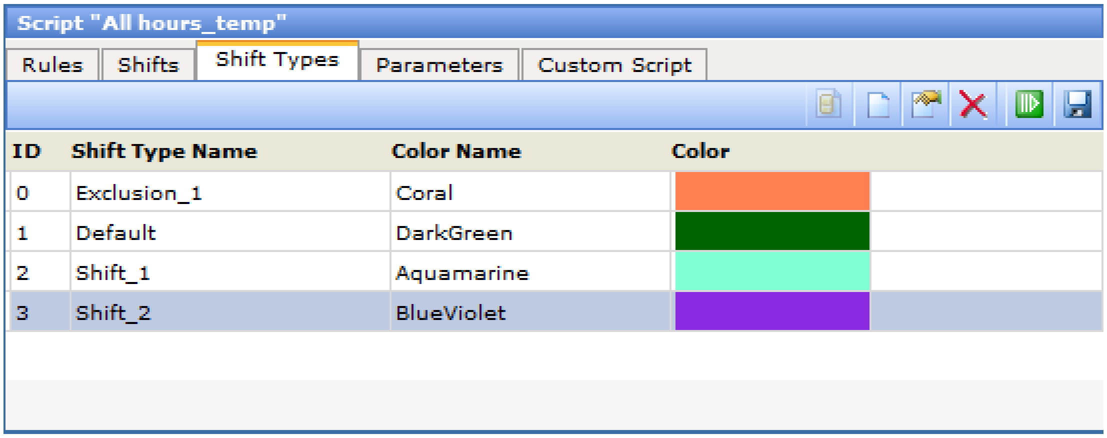


Figure 202 Creating shift and exclusion types using the Shift Types tab

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 press the New Shift button on the toolbar, and to create a new exclusion type you should press 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 dialog box as shown in the picture below.

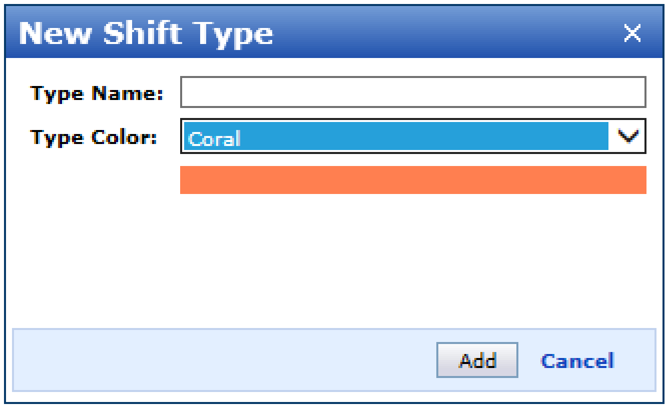


Figure 203 Adding a new shift (exclusion) type

Enter the shift (exclusion) type name in the Name field, then select the color in the Color field. Press 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 press 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 box fields will contain the current settings. Edit them as required and press OK to confirm the changes.

5. You can proceed with specifying shifts and exclusions using the Shifts tab then (see Specifying shifts and exclusions for use with the scheduling script on page 210 for instructions).

5.5.2 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 please refer to Specifying the shift (exclusion) type on page 208.

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 called the "default" shifts and "default" exclusions. Default shifts and exclusions are marked appropriately in the list (in the Shift Status column) and they are highlighted with the dedicated color (see the diagram legend) on the diagram.

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. Such shifts and exclusions are marked in the shift/exclusion list as belonging to a certain zone (in the Shift Status column). The diagram shows shifts/exclusions from different time zones highlighted with the appropriate colors (see the diagram legend).

Whatever time zone shifts belong to they cannot overlap at any circumstances. In case you specify the shift time limits that overlap with another shift CATI Supervisor warns you by displaying a message stating which shift this current shift overlaps with. An overlapping shift could not be created. Similarly, you could not create an overlapping exclusion.

To specify a shift or exclusion:

1. With the scheduling script opened in the View mode (see Viewing the existing Scheduling script settings on page 206 for details), choose the Shifts tab in the bottom right frame. This will display the list of existing shifts.

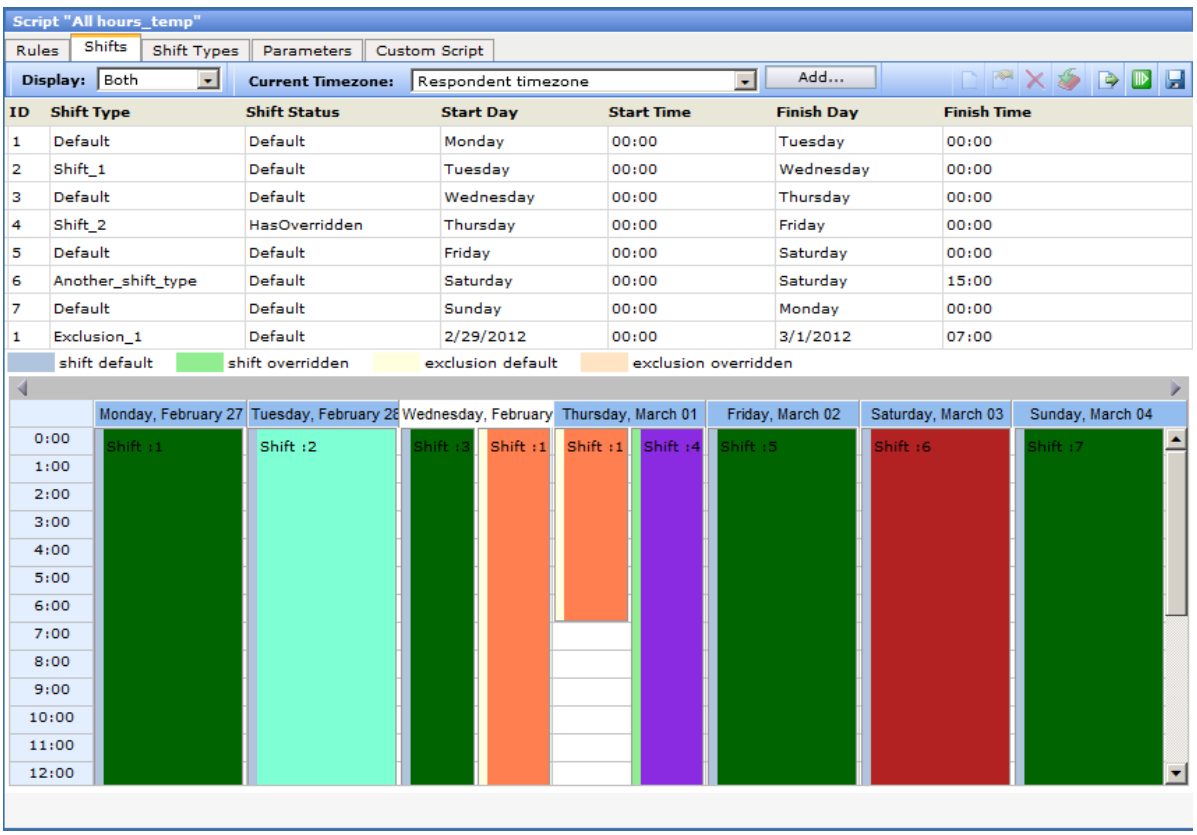


Figure 204 Specifying shifts and exclusions using the Shifts tab

2. The Shifts tab displays the existing shift and exclusion list at the top, and the corresponding diagram below.

   The list and the diagram contain 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 at any circumstances. This rule applies to ALL shifts existing in ALL timezones.

Mind that the shift/exclusion list and the diagram show items pertaining to the currently selected time zone only. If you need to check whether the required time slot is occupied by a shift in another timezone you have to select this timezone from the drop-down list and check the situation there.

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 digram 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 highlightt 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.

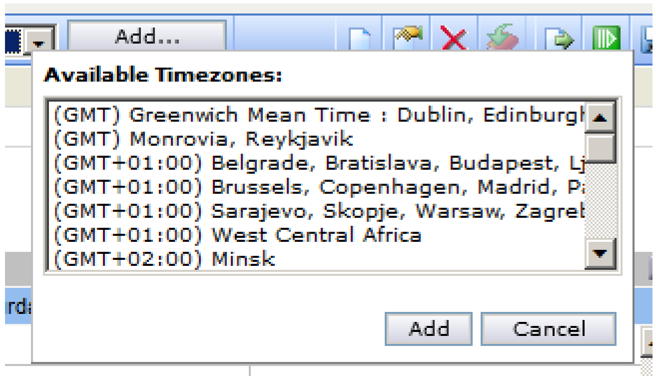


Figure 205 Adding a time zone

If the required time zone is absent in this list, you should probably 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 on page 362.

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.

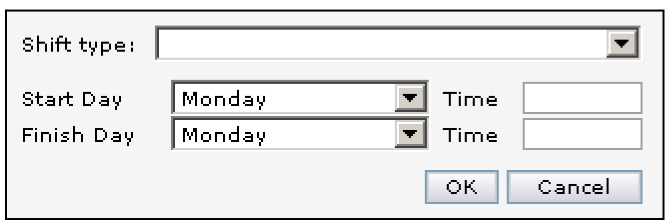


Figure 206 Adding a new shift

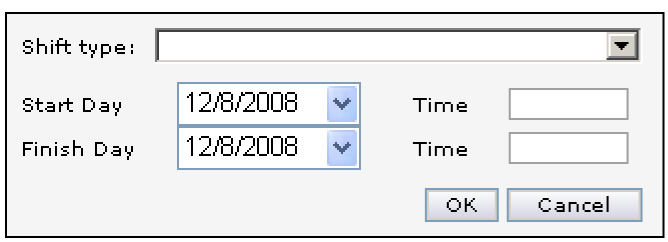


Figure 207 Adding a new exclusion

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.

Press 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 press the Set Default button on the toolbar.
7. If you wish to edit any of the listed items you should select it in the list and press 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 press OK to confirm the changes.
8. You can proceed with specifying scheduling rules using the Rules tab then.

5.5.3 Specifying scheduling script rules

A scheduling script can use any number of rules. A scheduling rule consists of subrules and actions.

A rule itself is in fact a container. To correctly define a rule you should specify at least one subrule for this rule (for example, which tells what extended status during which shift will trigger the script), and one action for this subrule (for example, which tells what kind of action and how should be executed when the subrule is satisfied). Any number of subrules is allowed for a rule, and any number of actions is allowed for a subrule.

You can search through an existing scheduling script for particular rule, subrule or action - see Searching for a particular rule, subrule, or action in the scheduling rules list on page 218 for details.

To specify a scheduling script rule:

1. With the scheduling script opened in the View mode (see Viewing the existing Scheduling script settings on page 206 for details), choose the Rules tab in the bottom right frame. This will display the list of existing scheduling rules.

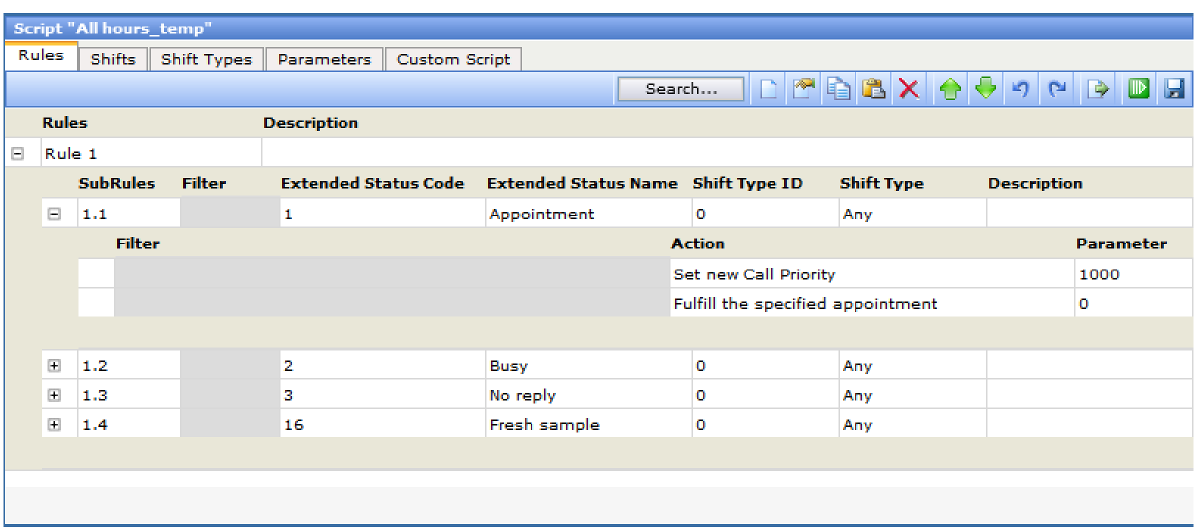


Figure 208 Viewing the scheduling rule list for the selected scheduling script

Scheduling rules are presented in the list in the hierarchical form – the Subrules in this list are presented as branches of the appropriate rules, and actions – as branches of the appropriate subrules.

Normally the subrules 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 at once by pressing the Expand All or Collapse All buttons on the toolbar.

2. Using this tab you can create new, edit and delete existing rules, subrules 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, which appears when you right-click any listed item.

   You can copy and then paste selected rules, subrules and actions. Copied items can be pasted only into the same scheduling script. All items are copied alone, without subitems (e.g. rules are copied without subrules, subrules without actions).

   You can move subrules 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 subrule.

   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 you should select a rule in the list and press 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 subrule you should select a subrule in the list and press the New button on toolbar, or right-click the required rule and choose New Subrule from the context menu.

   To create a new action you should select an action in the list and press the New button on toolbar, or right-click the required subrule and choose New Action from the context menu.

   You can also export the defined scheduling rule description (along with all subrules and actions specified for this rule).

3. The New command for a rule displays the dialog box as shown in the picture below.

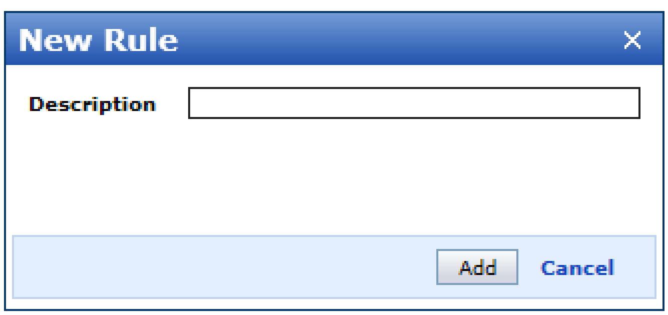


Figure 209 Adding a new scheduling rule

   Enter the rule description in the Description field.

   Press 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 – it is generated by the system and cannot be edited. Normally it shows the execution order of the rule.

4. The New command for a subrule displays the dialog box as shown in the picture below.

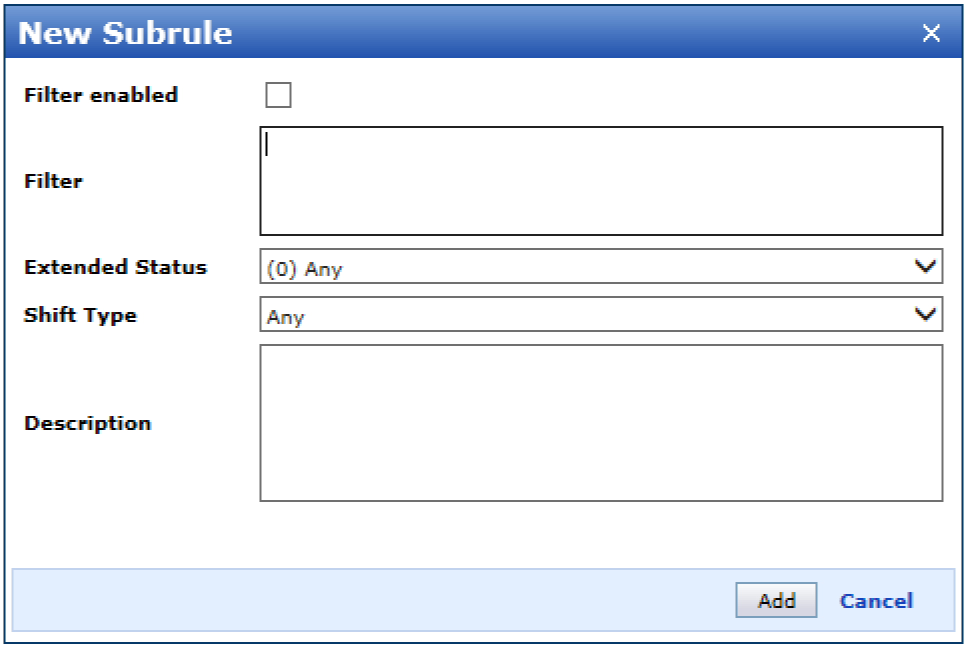


Figure 210 Adding a new subrule

Enter the filter expression in the Filter field (in case you need to apply this subrule only to the interviews matching this filter). Check the Filter enabled box above to enable the filter. Otherwise leave it clear. Select the interview extended status in the Extended Status drop-down box (this subrule will trigger the script when an interview is assigned this state). Select the shift type in the Shift type drop-down box (this subrule will trigger the script only during this shift). Then enter the subrule description in the free form into the Description field.

Press Add to create the subrule. The list in the frame refreshes, and the new subrule appears in this list as a branch of the selected rule.

The subrule ID (displayed in the first grid column) is a unique number – it is generated by the system and cannot be edited. Normally it shows the execution order of the subrule.

5. The New command for an action displays the dialog box as shown in the picture below.

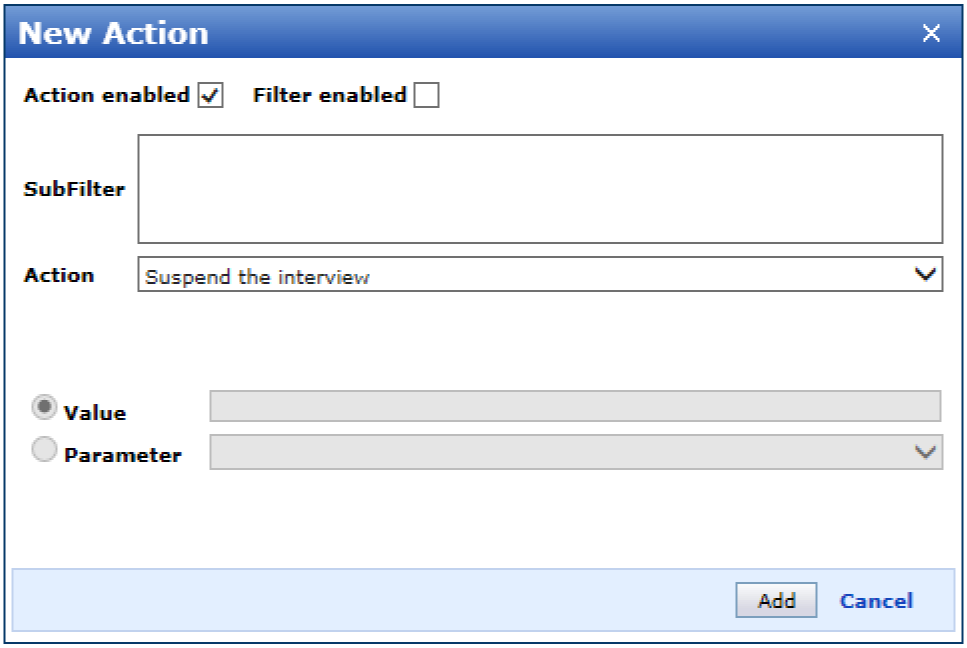


Figure 211 Adding a new action

The Action enabled box is checked by default. Clear it to disable this action.

Enter the filter expression in the SubFilter field (this subfilter expression is added to the subrule filter expression, and the action subfilter is applied after the subrule filter). Refer to the Scripting in Confirmit guide for instructions on how you can use different functions to build a subfilter expression. For instructions on how to use the Check the Filter enabled box above to enable the subfilter. Otherwise leave it clear.

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 entering the parameter value in case this is required by the selected action type - the Value field becomes accessible in such case. 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).

Also you can choose the parameter value from the list of parameters that were already defined for use with this scheduling script on the Parameters tab (see Parameterized scheduling scripts on page 218 for details regarding the "parameterized" scheduling scripts). 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.

Please refer to Appendix A for the complete action parameter description list.

Be aware that if the rule you create should 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!

Press 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 subrule.

5.5.3.1 Searching for a particular rule, subrule, or action in the scheduling rules list

You can search the scheduling rule list to find a rule, subrule, 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 on page 206 for details), choose the Rules tab in the bottom right frame.
2. Press the Search button in the bottom right frame title bar. This will display the following dialog box.

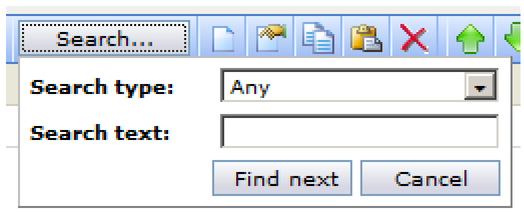


Figure 212 Searching the scheduling rule list

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.

   Press the Find next button. The first item with the selected attribute value matching the search condition will be highlighted in the list.

   Press the Find next button again to highlight another match.
4. Click Cancel to close this dialog box.

5.5.4 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 Viewing and modifying parameters of the scheduling script used with the survey on page 96 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 right frame for the required scheduling script (see Viewing the existing Scheduling script settings on page 206).
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.

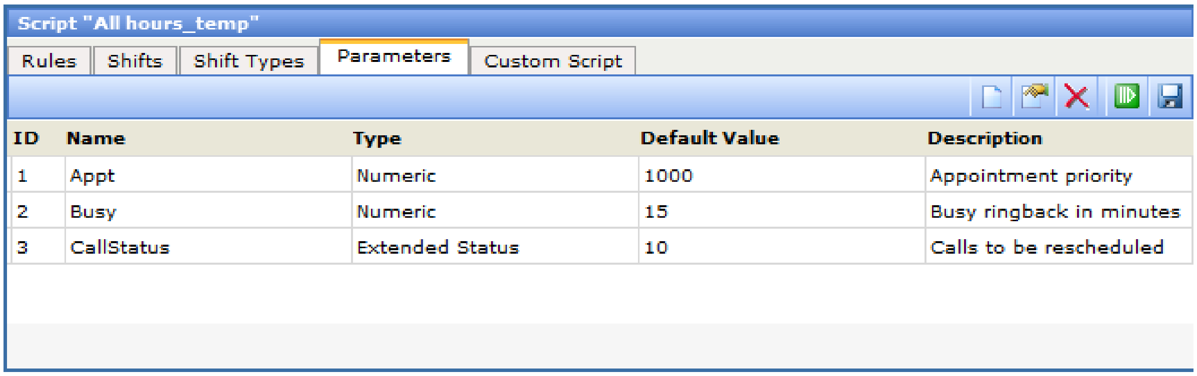


Figure 213 Viewing the scheduling script parameter set

3. Either press 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 Add Parameter dialog.

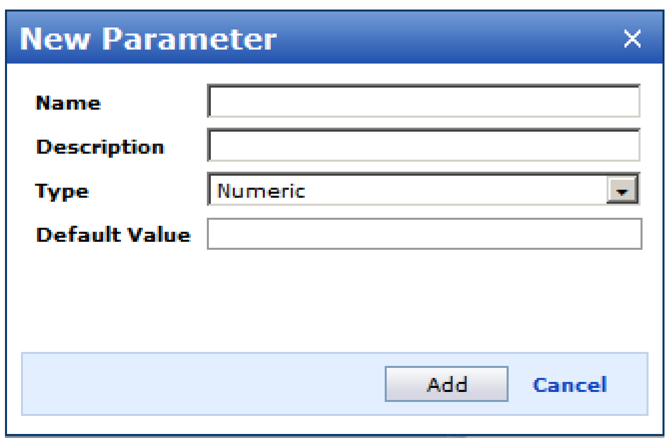


Figure 214 Adding a parameter to the scheduling script

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 Appendix A - Action parameter descriptions on page 419 for reference);
- Shift type - values that are supported for use with the appropriate action (see Appendix A - Action parameter descriptions on page 419 for reference);
- Assignment - values that are supported for use with the Assign User/Group action (see Appendix A - Action parameter descriptions on page 419 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 Specifying scheduling script rules on page 214 for instructions on how to use parameters with actions added to the scheduling script).
7. Press 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 (see Viewing the existing Scheduling script settings on page 206).
2. Change to the Parameters tab. Select the required parameter in the list and either press 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. Press 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 (see Viewing the existing Scheduling script settings on page 206).
2. Change to the Parameters tab. Select the required parameter in the list and either press 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. Press 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.

   Press the Save button on the toolbar to save the current scheduling script, or press the Save and Launch button on the toolbar to consequently save and launch the script.

   You can also refer to Saving a scheduling script on page 226 and to Launching a scheduling script on page 226 topics for more details.

5.5.5 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 on page 206 for details), choose the Rules tab in the bottom right frame.
2. Select a rule, subrule, or action and press the Copy button in the bottom right frame toolbar. The item is copied without the 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 subrule – on a subrule level and so on.
4. Press the Paste button in the bottom right frame toolbar. The item is pasted below the selected the row (taking into account the script hierarchical structure).

5.5.6 Exporting the scheduling script definition in the Script View mode

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 (see Viewing the existing Scheduling script settings on page 206 for details), choose the Rules tab in the bottom right frame.
2. Press 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.

   Press the Save button. This will display the standard Windows Save As dialog box. Enter the file name and and path to save the file in XML format, and press the Save button. The scheduling script definition is then saved to a file in XML format.

   If you press 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 that this command exports the complete definition of the scheduling script you are currently viewing, not a specific rule, subrule or action (regardless of what rule, subrule, 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 does - see Exporting scheduling scripts on page 230.

5.5.7 Changing the order in which rules, subrules, and actions are executed

Normally rules, subrules, and actions are executed in the order they are listed – items standing higher in the list are executed first.

You can change the execution order by moving any rule, subrule, or action higher or lower in the list. Note that a subrule 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 subrule.

To change the rules, subrules, and actions execution order:

1. With the scheduling script opened in the View mode (see Viewing the existing Scheduling script settings on page 206 for details), choose the Rules tab in the bottom right frame.
2. Select a rule, subrule, or action and press the Move Up or Move Down button
3. The CATI Supervisor module asks you to confirm the requested action by displaying a dialog box.

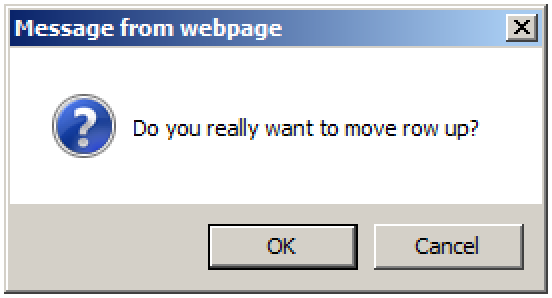


Figure 215 Confirmation dialog for Move operation

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 of the different direction. Press OK to move an item in the chosen direction.

4. The bottom right frame refreshes, and items in the list are displayed in the changed order.
5. You should repeat this operation to move an item several rows higher or lower.

5.5.8 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 on page 214).

To create a custom scheduling script manually:

1. With the scheduling script opened in the View mode (see Viewing the existing Scheduling script settings on page 206 for details), choose the Custom Script tab in the bottom right frame.

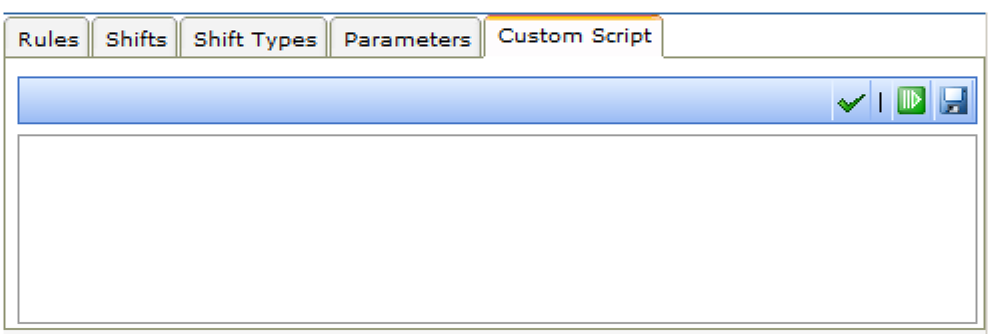


Figure 216 Adding a custom script

This tab contains a single text field, which you will use to enter the 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. Press the Parse button in the bottom right frame toolbar to check the code for correctness.

Please refer to Accessing the call object in custom scripting on page 223 for object description and code examples.

5.5.8.1 *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(Schedul-
                ing.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);

                }

        }

}
```

5.5.9 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 below 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 press 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 a good idea to press the Save button each time it starts flashing - this way CATI Supervisor prompts you to save the changes you have made to the scheduling script.

5.5.10 Launching a scheduling script

When you finish configuring and checking the scheduling script you may instantly 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 above), 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 on page 206 for details), and choose any tab in the bottom right frame.
2. Press 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.

5.5.11 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 subrule) 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 subrule you would like to add the "Restore..." action to. Pay attention to the sequence in which rules, subrules and subrule 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 subrule.

   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.

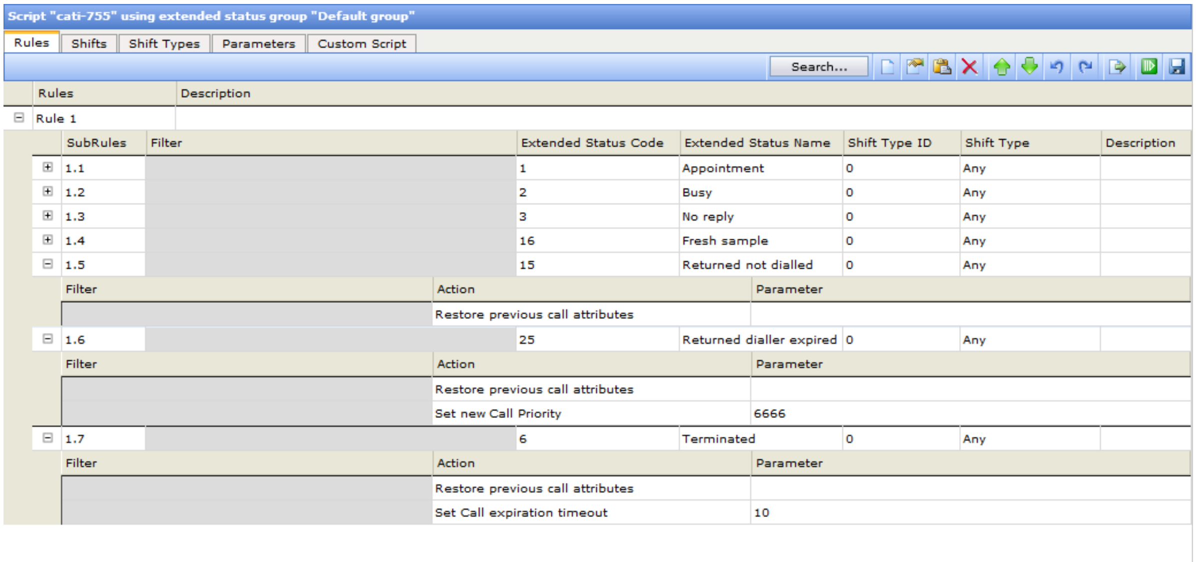


Figure 217 An example of scheduling script containing the "Restore previous call attributes" action

Pay attention to subrules 1.5, 1.6 and 1.7. All these subrules 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.

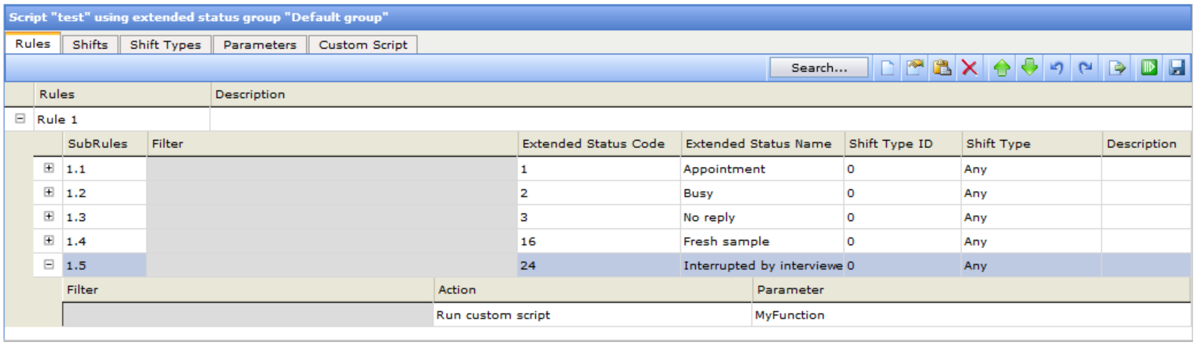


Figure 218 An example of the scheduling script containing a reference to the custom script

Pay attention to subrule 1.5. This subrule uses action which calls the custom script with the name "MyFunction".

5. Please take into account the sequence of rule, subrule and action execution - the Custom Script action which calls the appropriate custom script and executes the RestorePreviousCallState function should be specified for the appropriate subrule (all other existing rules/subrules/actions should be taken into account).

5.6 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 on page 202 for instructions).
2. Press 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.

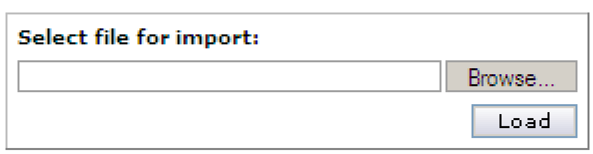


Figure 219 Selecting an XML description of a scheduling script for import

Enter the name and path to the file containing the scheduling script description in XML format, or press the Browse button to display the standard Windows Open File dialog box. Navigate to the file containing the description you want to import and press the Open button. The name and path to the file will appear in the Select file for import field.

Press 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.

5.7 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.

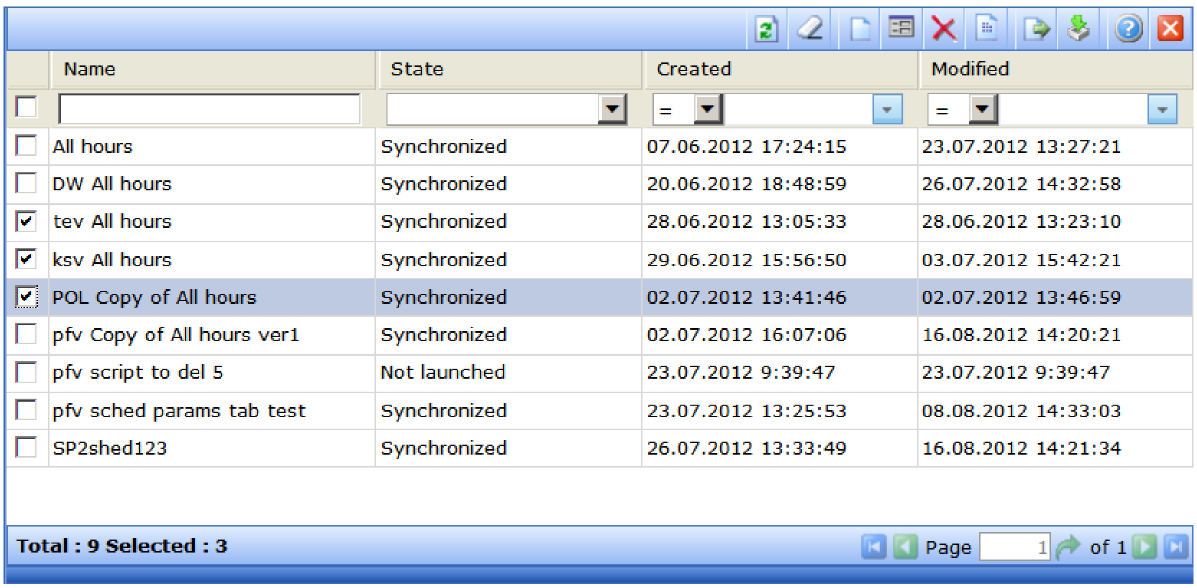


Figure 220 Multiple scheduling script selection for export

   To deselect all the selected objects you should press the Clear Selection button in the top right frame toolbar. This will remove all ticks from the checkboxes.

2. Press 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.

   Press 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 press 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.

5.8 Deleting scheduling scripts

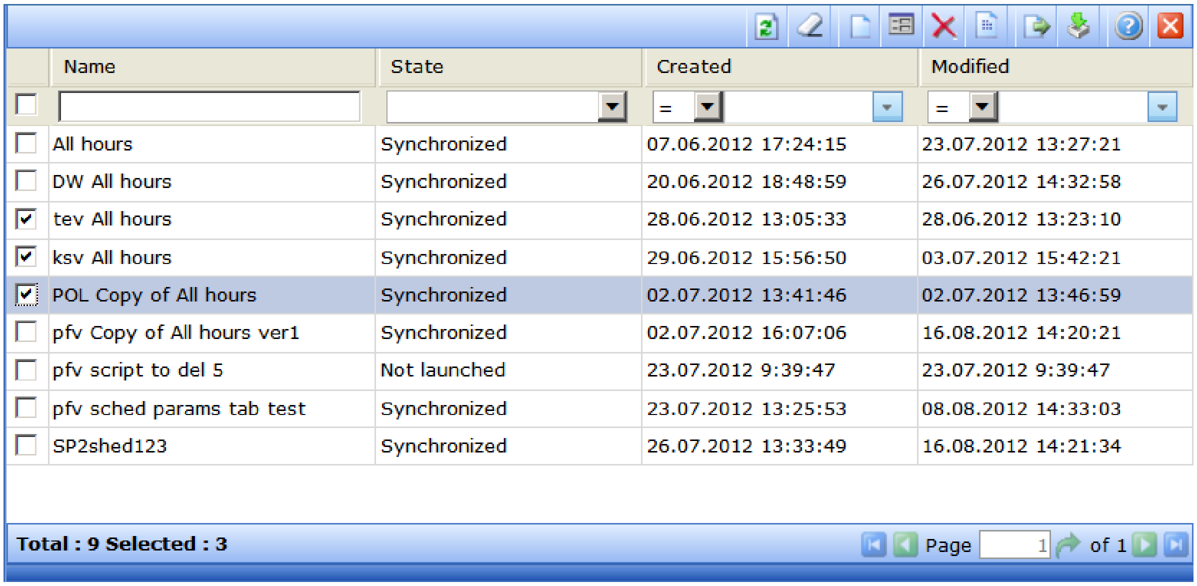
You can discard one or a number of existing scheduling scripts in case you do not need them anymore.

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.



	Name	State	Created	Modified
☐	All hours	Synchronized	07.06.2012 17:24:15	23.07.2012 13:27:21
☐	DW All hours	Synchronized	20.06.2012 18:48:59	26.07.2012 14:32:58
☑	tev All hours	Synchronized	28.06.2012 13:05:33	28.06.2012 13:23:10
☑	ksv All hours	Synchronized	29.06.2012 15:56:50	03.07.2012 15:42:21
☑	POL Copy of All hours	Synchronized	02.07.2012 13:41:46	02.07.2012 13:46:59
☐	pfv Copy of All hours ver1	Synchronized	02.07.2012 16:07:06	16.08.2012 14:20:21
☐	pfv script to del 5	Not launched	23.07.2012 9:39:47	23.07.2012 9:39:47
☐	pfv sched params tab test	Synchronized	23.07.2012 13:25:53	08.08.2012 14:33:03
☐	SP2shed123	Synchronized	26.07.2012 13:33:49	16.08.2012 14:21:34

Figure 221 Multiple Scheduling script selection

   To deselect all the selected objects you should press the Clear Selection button  in the top right frame toolbar. This will remove all ticks from the checkboxes.

2. Press 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.

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 shut-down 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.

The CATI Console installation files are downloaded only when the corresponding command is executed from the Confirmit Authoring user interface. You should be granted access to Confirmit Authoring before you can download and install the CATI Interviewer Console. Please refer to Confirmit Authoring manual for description of the user interface.

The URL from which you should download the CATI installation files will differ depending on which server you run Confirmit Authoring from.

IMPORTANTThis 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 Confirmit Authoring, go to the **CATI > Download CATI Console** menu command.

The Download CATI Console dialog opens. Here you can either send the URL to a specified email address or copy it directly into your clipboard.

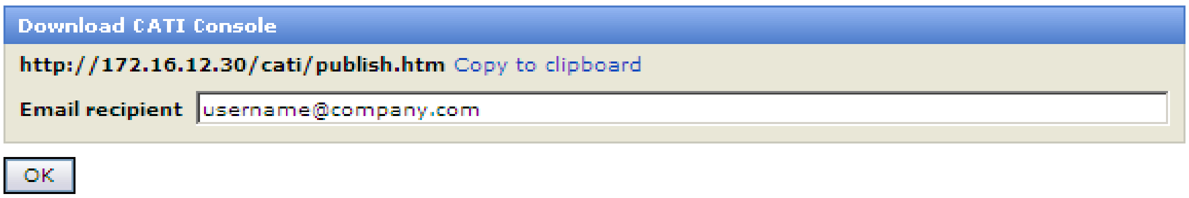


Figure 222 Fetching CATI Console download URL

The default email address, to which the download URL will be sent, is that specified for the currently-logged-on user - you.

2. Edit the email address if necessary and click **OK**, or copy the URL into your clipboard and paste it into your Internet Explorer.

   If using email, an email with the URL is sent to the specified address.

3. Click the URL to open IE at the appropriate download page.

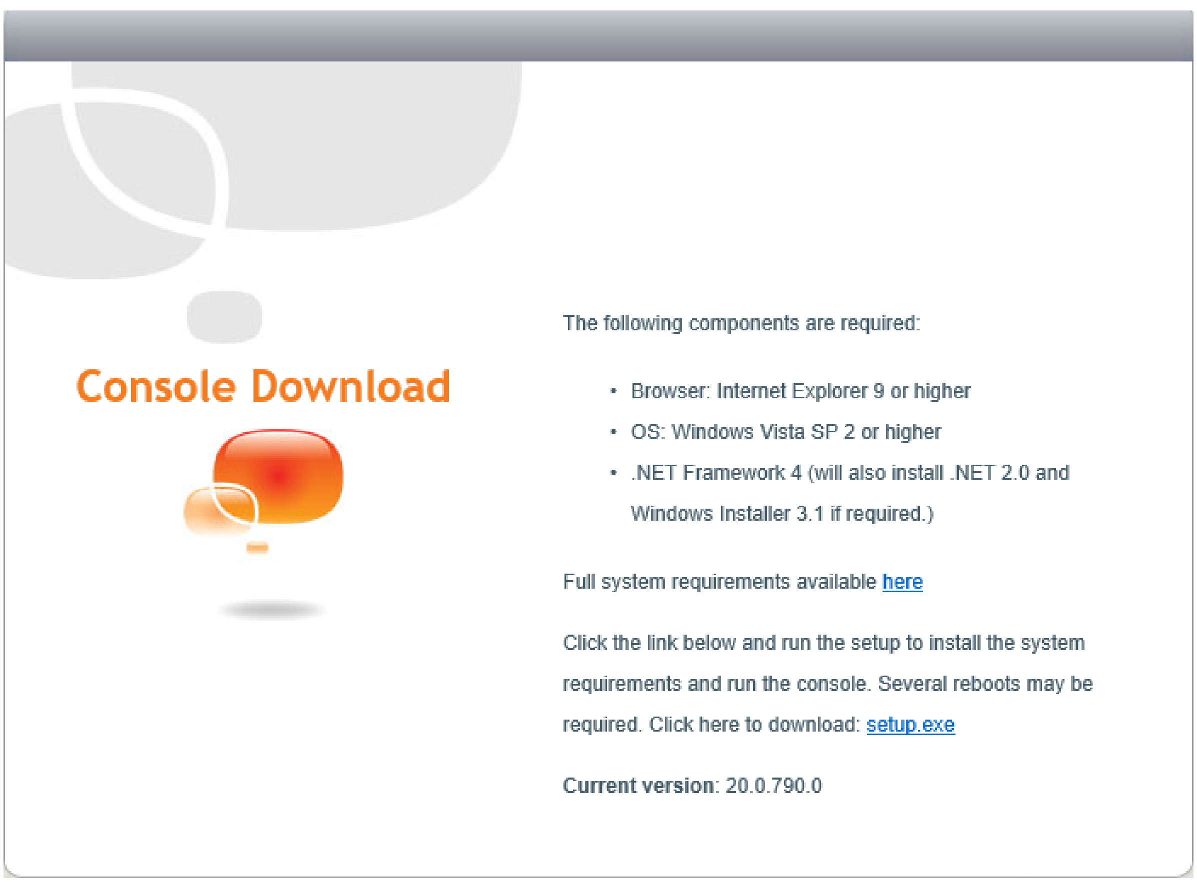


Figure 223 CATI Console download page

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 please refer to Installing a new copy of the CATI Console below.

   CATI Console upgrade procedure is described in Upgrading the CATI Console on page 237.

6.1.1 Installing a new copy of the CATI Console

To install a new copy of CATI Console:

Please refer to CONFIRMIT CLIENT-PC SYSTEM REQUIREMENTS document for the list of system requirements applied 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 on page 232 for details).
2. Please 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 (see Uninstalling the CATI Console application on page 237) 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 (see Downloading the CATI Console Installation Files on page 232) and installation procedures.

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.

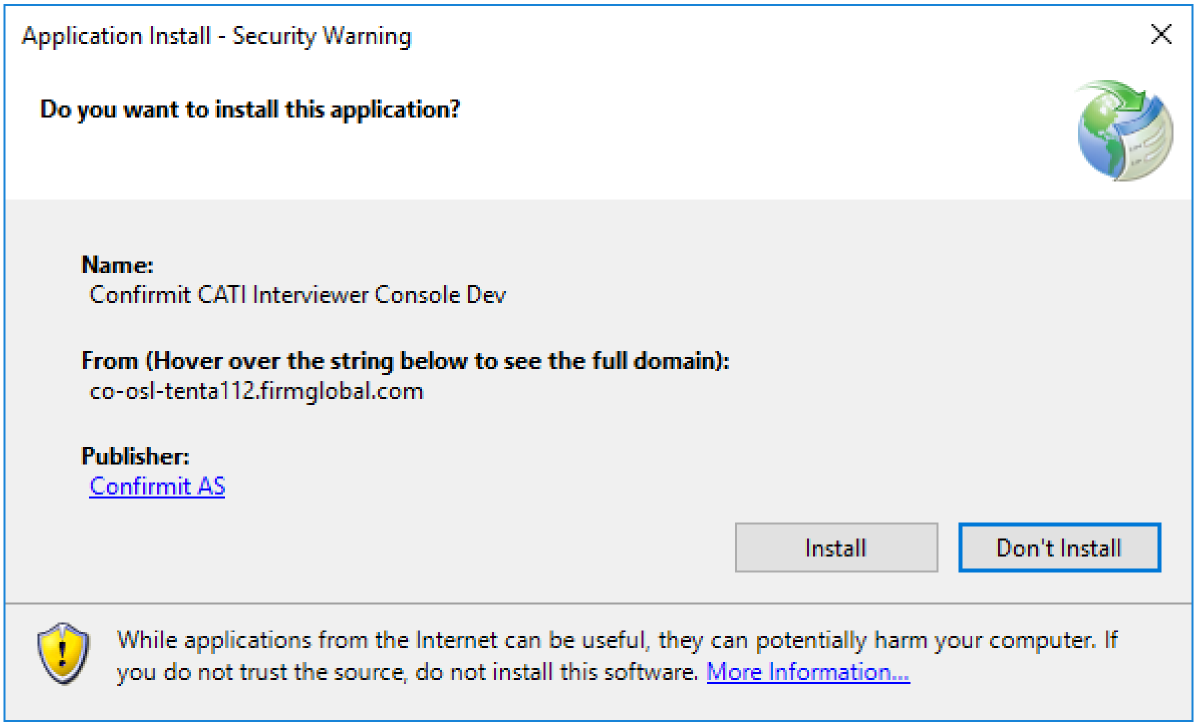


Figure 224 CATI Console security warning produced at the time of installation

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.

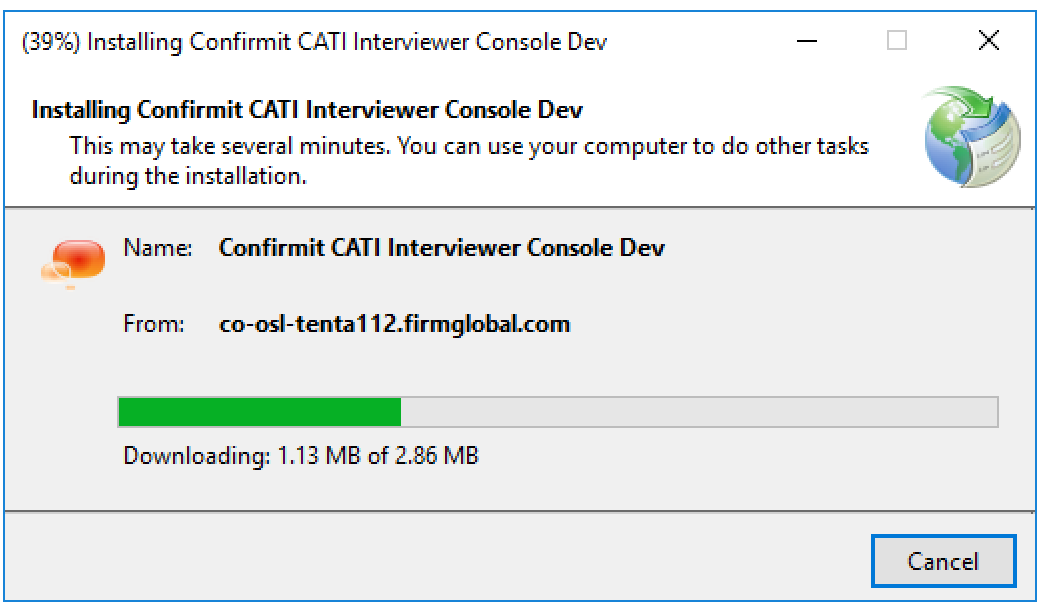


Figure 225 CATI Console installation progress

The CATI Console is installed into the default destination. You cannot change the installation path.

Please 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 below 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

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 into 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.

   Follow the instructions provided and complete the procedure.

6.2 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.

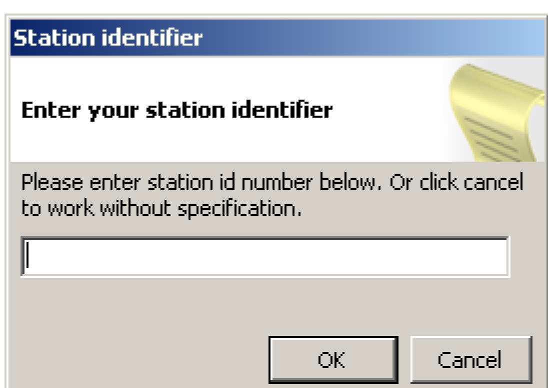


Figure 226 Entering the Station Identifier

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 press 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 press OK to proceed with the login procedure.

After the submitted Station ID is successfully verified, the CATI Interviewer Console displays the login screen.

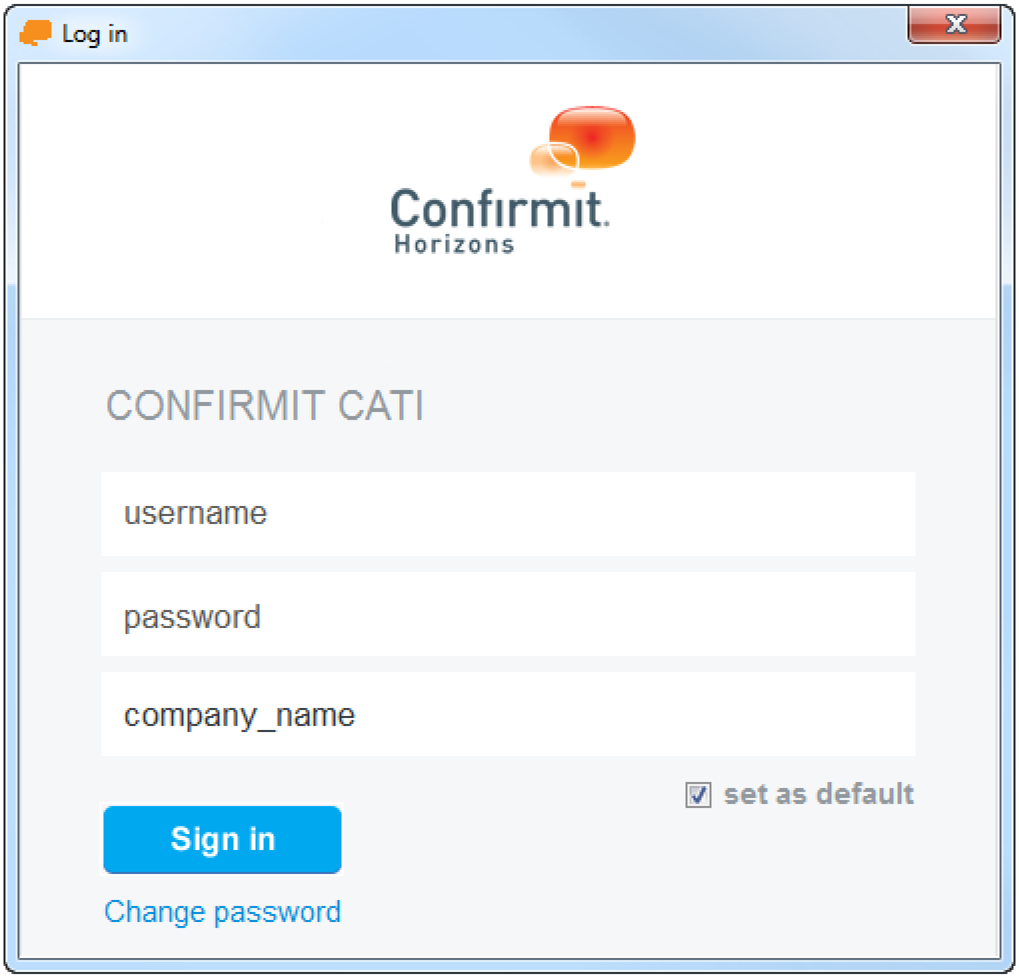


Figure 227 The CATI Console - Log in dialog

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 press 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.

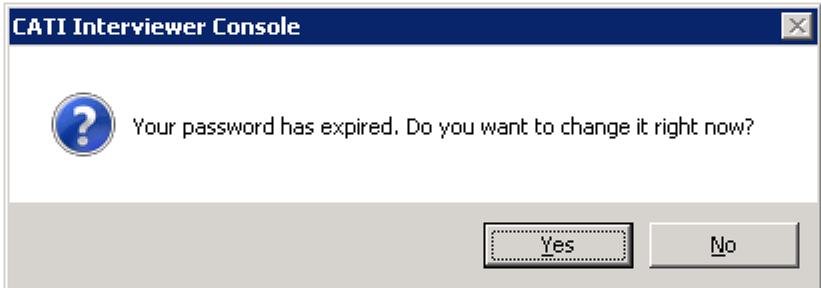


Figure 228 Interviewer password expiration warning

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).

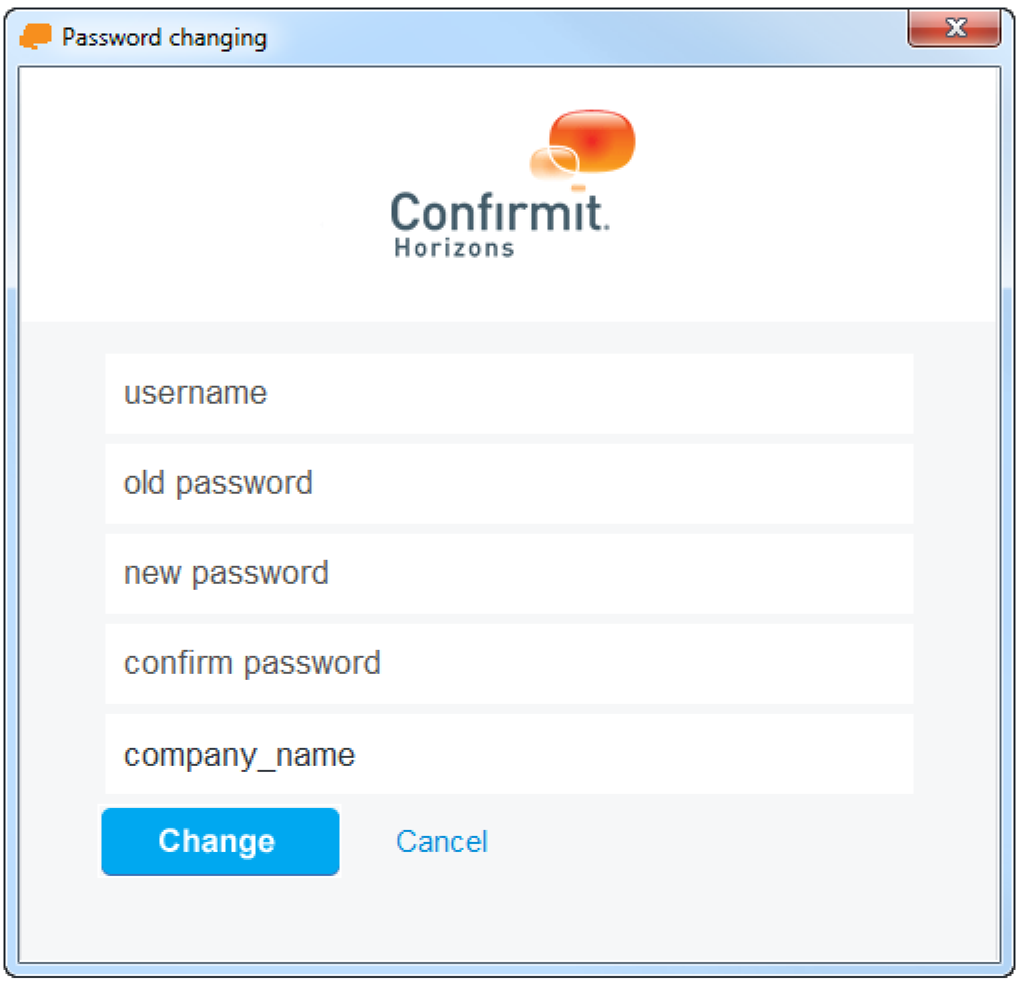


Figure 229 Password changing dialog

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. Please refer to Terminating an interview on page 285 for more information on the intentional console shutdown and to Interview terminated by the supervisor on page 286 on forced interviewer logout.

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.

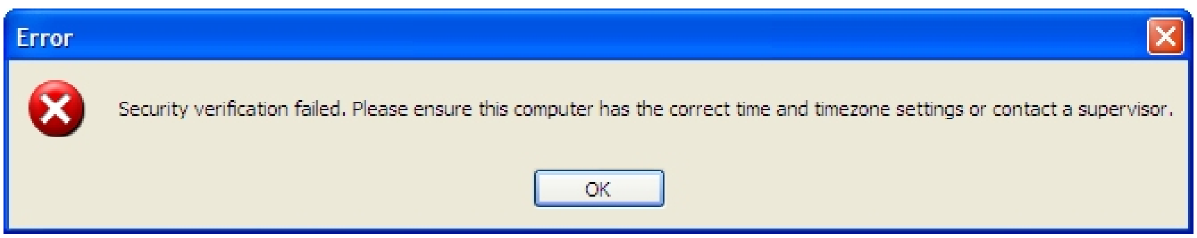


Figure 230 Warning message displayed if the interviewer computer system time does not correspond to the UTC

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.

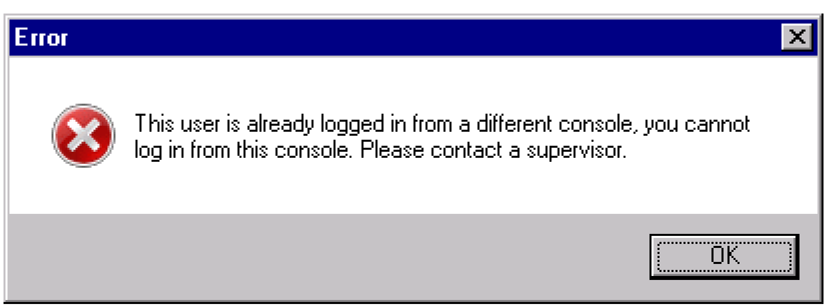


Figure 231 Warning message displayed when the interviewer performs multiple login

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 - please refer to Dialer on page 341 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 instantly 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).

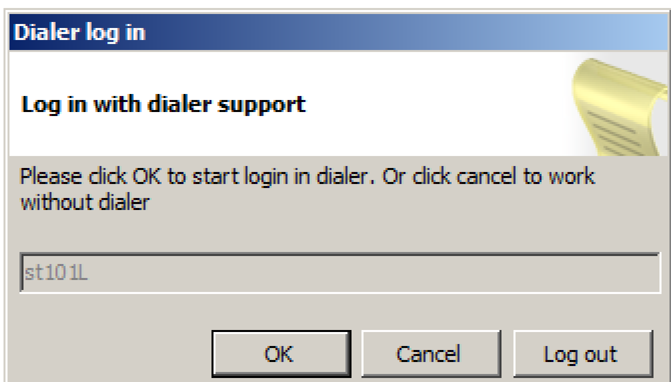


Figure 232 Logging in with or without dialer support

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.

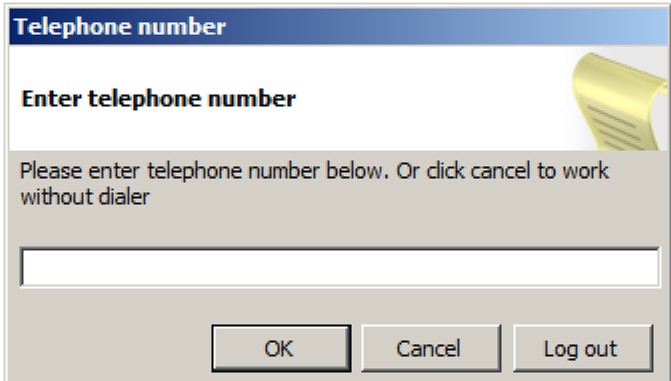


Figure 233 Entering the telephone number for work with the Dialer

Please mind 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 press Cancel in this dialog window to perform all the dialing manually, without using the dialer.

Pressing the Log out button will instantly 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.

Please read Selecting a Survey/Interview on page 248 and Logging Out and closing the CATI Console window on page 287 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.

Please follow instructions contained in Selecting a Survey/Interview on page 248 and Interviewing procedures on page 256 to understand how the work in the CATI Console is organized.

6.3 The CATI Console 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.

Depending on the task choice mode designated for the current interviewer the CATI Console may start with displaying:

- the Survey/Interview list in the work area;
- the Interview Question in the work area.

The picture below shows the CATI Console displaying the Survey/Interview list in the work area.

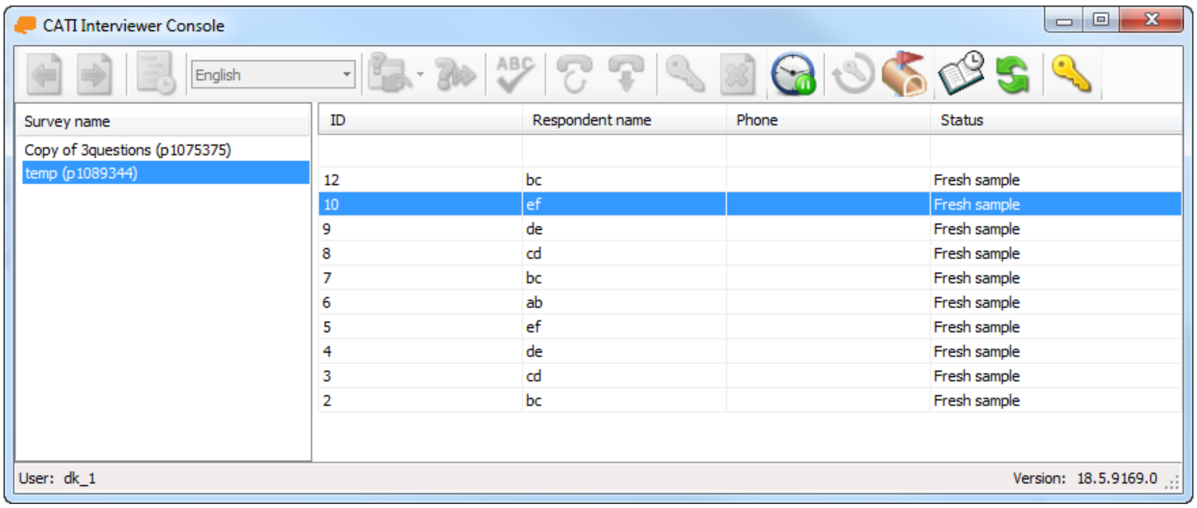
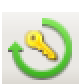
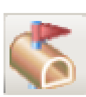


Figure 234 The CATI Console - Survey/Interview selection area

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 - please see Interviewer on a break on page 273 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 Choice mode on page 254 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 can change its look when an unread message is available for the interviewer - it will look like that . Please refer to Viewing messages on page 247 for instructions on how to read messages.

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.

The survey and the interview list will show only surveys and interviews for which the current interviewer was assigned.

Another picture shows the CATI Console displaying the interview page in the work area (actual layout of the interview pages may vary).

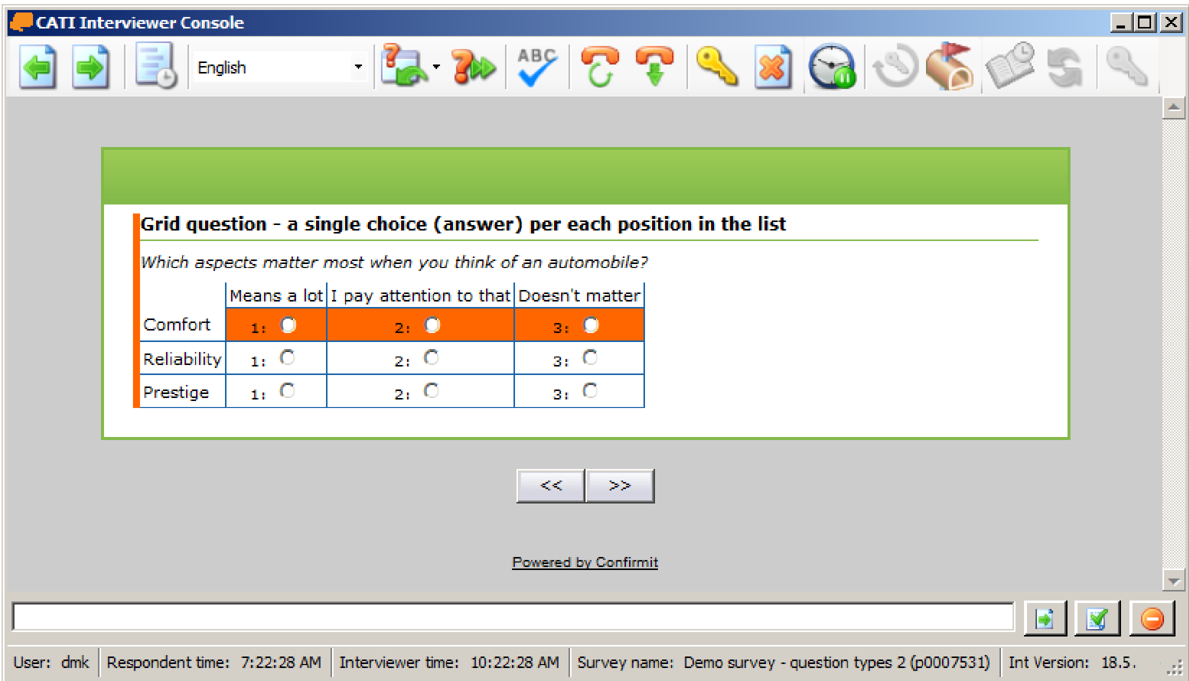


Figure 235 Interview question displayed in the work area

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 (refer to The Redial functionality in the CATI Interviewer Console on page 282 for details).
	Ctrl+H	HANG UP THE RESPONDENT LINE	Hangs up the respondent phone line. Available only when the dialer is in use.
	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 The CATI Interviewer Console provides the user with a set of hot key combinations that can be used instead of buttons. Moving through interview questions and answer selection can be performed with the help of hot keys. Refer to Keyboard support in the CATI Interviewer Console on page 268 for keyboard functionality description, and to Appendix C - The list of hot key combinations used with CATI Interviewer Console on page 425 for a list of hot key combinations available in the CATI Interviewing Console.

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.

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.

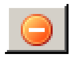
Besides the question text and answer variants the work area may display prompts, warnings and other messages which guide the interviewer.

A keyboard entry box and the corresponding button set are displayed in the bottom of the work area. Please refer to Keyboard support in the CATI Interviewer Console on page 268 for complete description of the functionality available with the use of the keyboard entry text box.

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.

6.4 Viewing messages

An interviewer can receive messages from the supervisor in two situations:

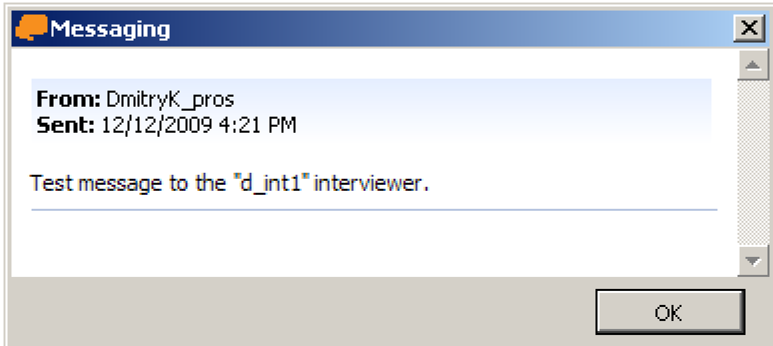
- upon successful logging into CATI Interviewer Console;
- while working with the Console.

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 in the toolbar looking like this . To view the message (or there may be a number of messages waiting) he/she should press the Messaging button, which will open the Messaging dialog window.

In case the interviewer receives a message while he was 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.
4. Press OK to close the Messaging window.
5. All messages that were displayed in the Messaging window during one Console session are deleted when this session ends. Unread messages, and messages received during the time the interviewer was offline can be viewed after the interviewer logs back in.

6.5 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 on page 237 for instructions on engaging the Dialer).

In case the interviewer chooses not to use the Dialer he/she has 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 on page 341 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 on the next page 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 mode on page 250for 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 on page 251 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 on page 254 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 on page 341 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.

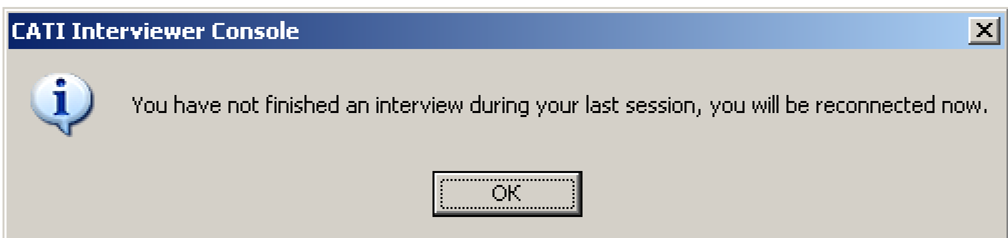


Figure 236 Warning message displayed upon logging in after abnormal application termination

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.

6.5.1 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.

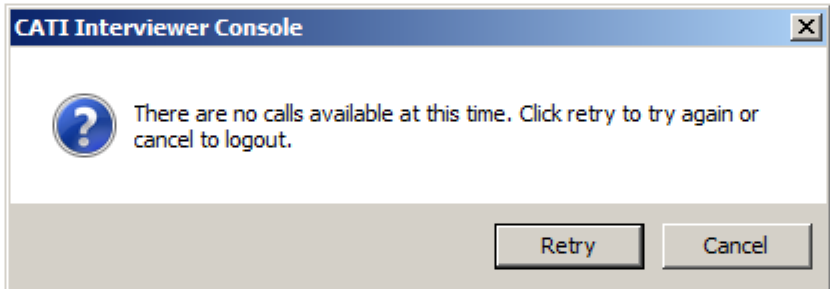


Figure 237 Message displayed upon logging in when no interviews are available

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.

6.5.2 Survey Selection mode

In this mode one or a number of surveys are assigned for the interviewer, and he/she can choose the one to work with.

So when the CATI Console starts in Survey Selection mode the interviewer is presented with the list of all assigned surveys displayed in the work area.

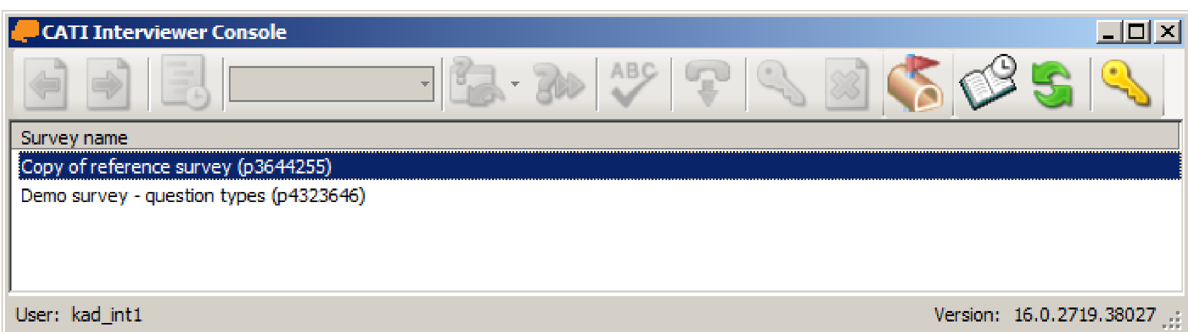


Figure 238 The CATI Console - Survey/Interview selection area

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 on the previous page 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, since there will be no choice of surveys (the interviewer cannot choose another survey in that case).

In case there are no surveys assigned for the current interviewer after he has logged in, the CATI Console displays the following message.

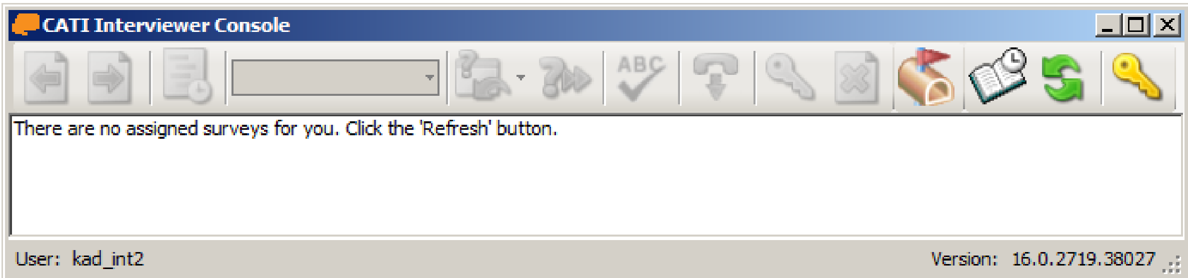


Figure 239 Warning message displayed upon logging in when no surveys are available in Survey Selection mode

At this point the interviewer can either log out of the CATI Console by pressing the Log out button  on the toolbar (please see Logging Out and closing the CATI Console window on page 287 for information on logout options), or press 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.

6.5.3 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.

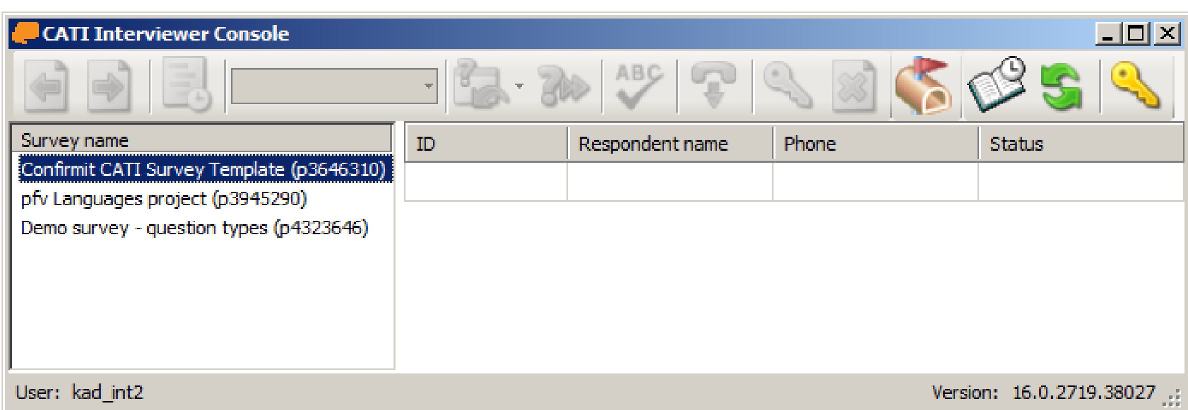


Figure 240 The CATI Console - Survey/Interview selection area in the Manual Selection mode

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.

Each interview is displayed in the list as a single row. Interview parameters are shown in columns - column names display different interview parameter names. First four columns are fixed - these parameters are always displayed in the interview list by default. Additional set of parameters displayed in columns is determined by the settings which are configured by the supervisor in Confirmit Authoring (please refer to the appropriate section in the Confirmit Authoring manual for instructions) and on the Interviewer Search tab of the Survey Information view (see Adding searchable questions to the interview on page 95).

To start interviewing you have to select an interview by double-clicking its name in the list in the right pane.

In case there are no interviews at all assigned for the current interviewer, the CATI Interviewer Console displays the following message.

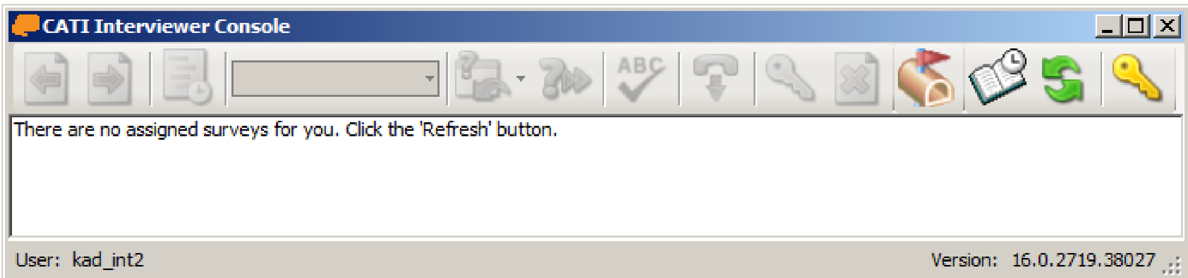


Figure 241 Warning message displayed upon logging in when no surveys are available in Manual Selection mode

At this point the interviewer can either log out of the the CATI Console by pressing the Log out button  on the toolbar (please see Logging Out and closing the CATI Console window on page 287 for information on logout options), or press 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 any parameter that is currently displayed 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 for entering a symbol combination (a search string) that will act like a filter (see the picture below).

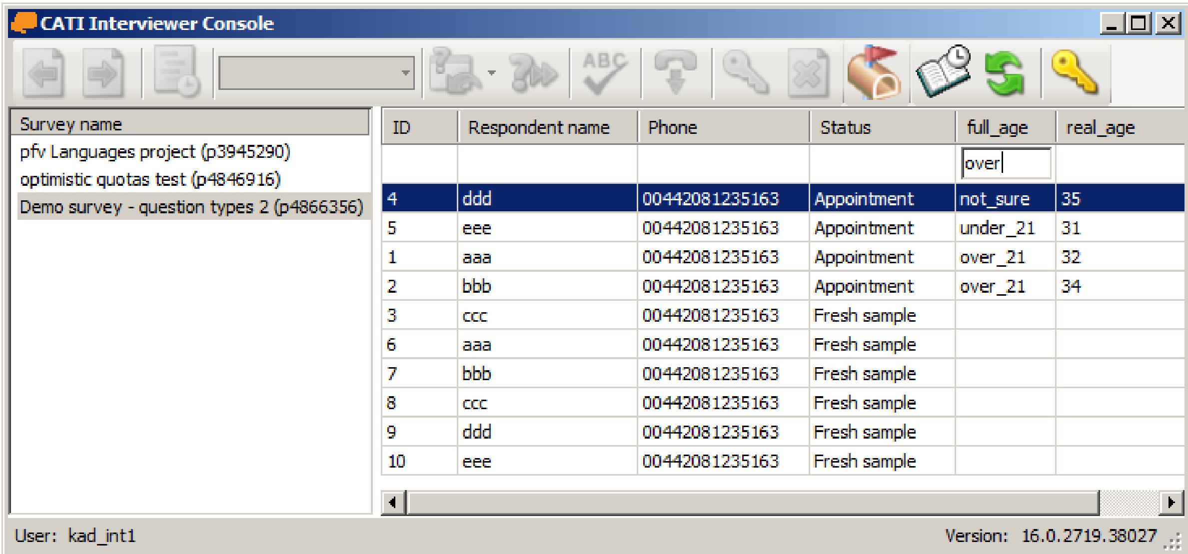


Figure 242 The CATI Console - searching for the interview by its parameters

To search by the particular parameter click inside the blank cell below the corresponding parameter column header cell and type a symbol combination there. Then press Enter on the keyboard - the CATI Console will display only interviews with that parameter matching the entered search string, hiding all the rest interviews. The search string assumes you are using wildcards, you do not have to type them - all names containing the entered character combination are considered matching.

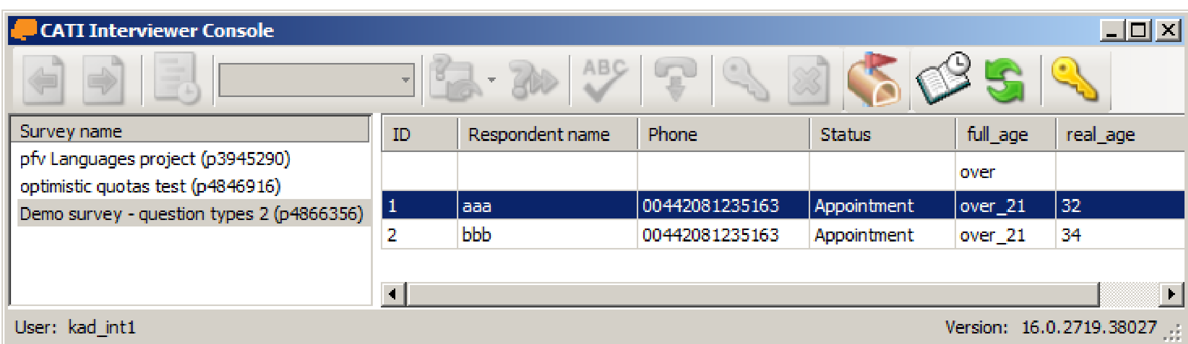


Figure 243 The CATI Console displaying the search results

To display the complete list of the available interviews again the interviewer should either:

- delete the search string displayed in the search cell and press Enter, or
- press the Refresh button on the toolbar.

Both actions will reveal all the interviews that are available for the currently logged in interviewer.

6.5.4 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.

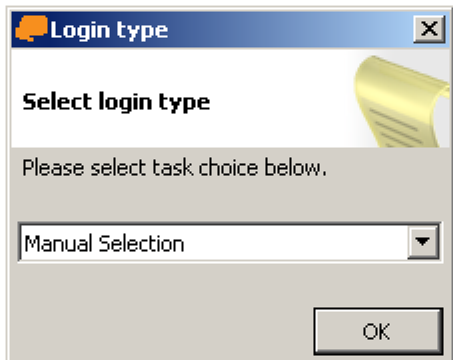
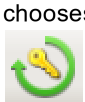


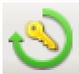
Figure 244 Selecting the task choice mode in the Choice mode

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 press OK. The CATI Interviewer Console then starts in the selected mode.

Please refer to Automatic mode on page 249, Manual Selection mode on page 251, and Survey Selection mode on page 250 for information on other task choice modes.

The procedure described above is applied when the interviewer works with the Dialer in use (see Dialer on page 341). 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 Dialer on page 341).

To be able to choose the task choice mode for the next interview the interviewer should press 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 press 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.

6.6 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 press the Show My Appointments button  on the toolbar.

   This will display the Interviewer Appointments window.

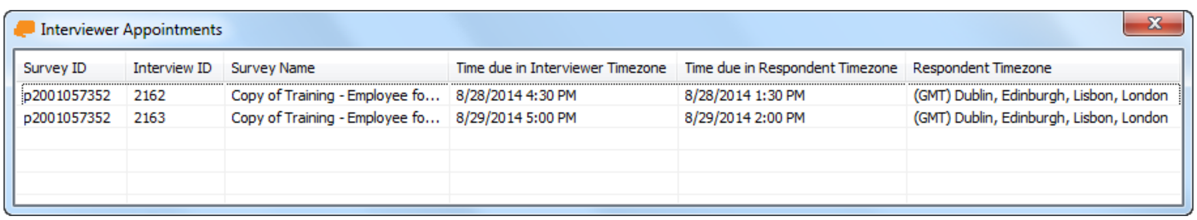


Figure 245 The Interviewer Appointments window

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. Press the cross button in the top right corner of the Interviewer Appointments window to close it.

6.7 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 (please 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.

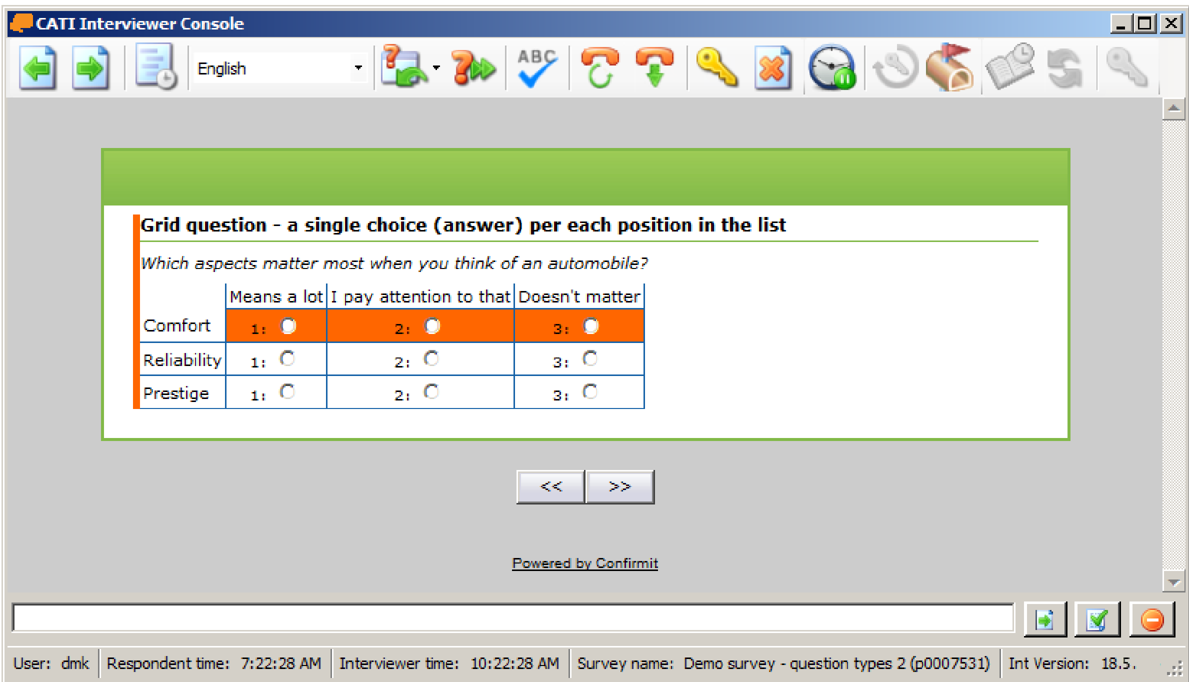


Figure 246 Example of an interview page displayed in the work area - it contains extra info, prompts and a question

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.

6.7.1 Going through an Interview

This chapter 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. Please 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 – please refer to Selecting a Survey/Interview on page 248 for details on task choice modes.

The work area of the CATI Interviewer Console

The Work area in the CATI Interviewer Console is a space between the toolbar (see The CATI Console interface on page 243 for details regarding buttons located on the toolbar) at the top of the application window and the status bar in the bottom of this window (see The CATI Console interface on page 243). 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. The Work area may display different content depending on the situation.

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 Keyboard support in the CATI Interviewer Console on page 268, and the basic set of hot key combinations supported by the CATI Interviewer Console can be found in Appendix C - The list of hot key combinations used with CATI Interviewer Console on page 425.

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.

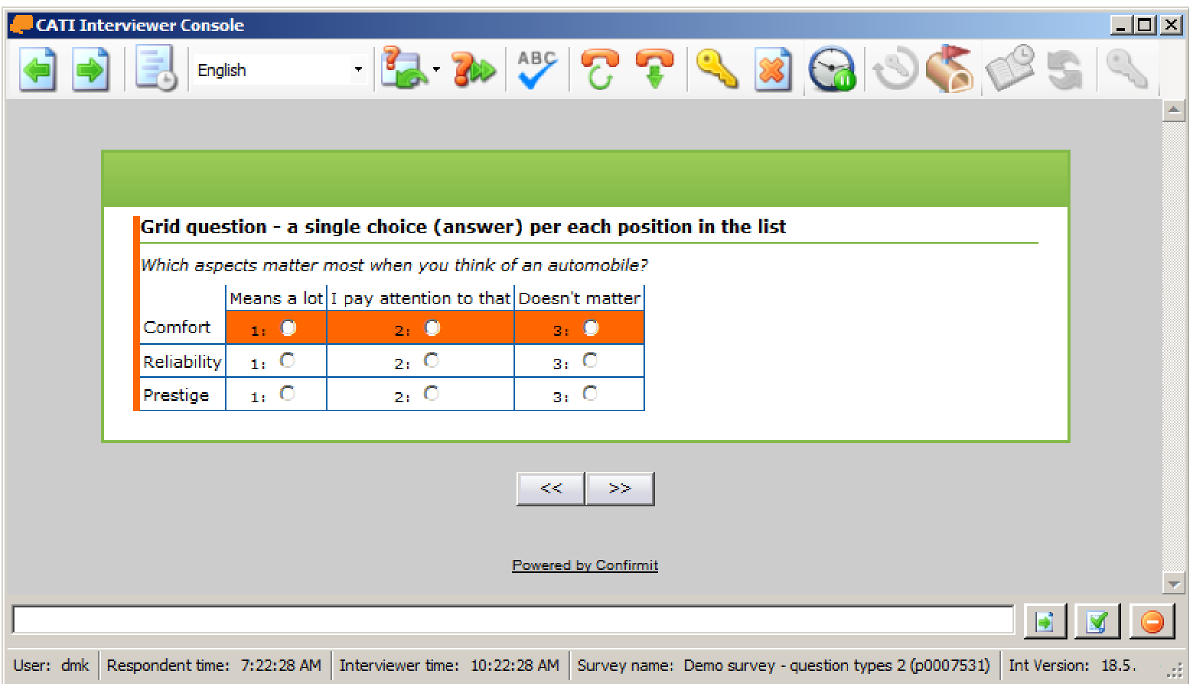


Figure 247 Selecting an answer to the question

Keyboard entry box

Please 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 press 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 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 the 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 a previous answer himself. The best way to get back to the required question is to press the Redo button on the toolbar (see Modifying an already entered answer variant (and returning back). The Redo and Fast Forward commands. on page 279 for instructions).

Jumping forward or returning to the last question

When the interviewer moves a number of questions back, he/she has an option of quickly returning to the question page that he has left without the need of going forward through questions one by one. To return to the last question page you should press the Fast Forward button on the toolbar. Alternatively the following hot key combination can be used – Ctrl+Enter. See Modifying an already entered answer variant (and returning back). The Redo and Fast Forward commands. on page 279 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 press the Redial button on the toolbar (please refer to for instructions).

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.

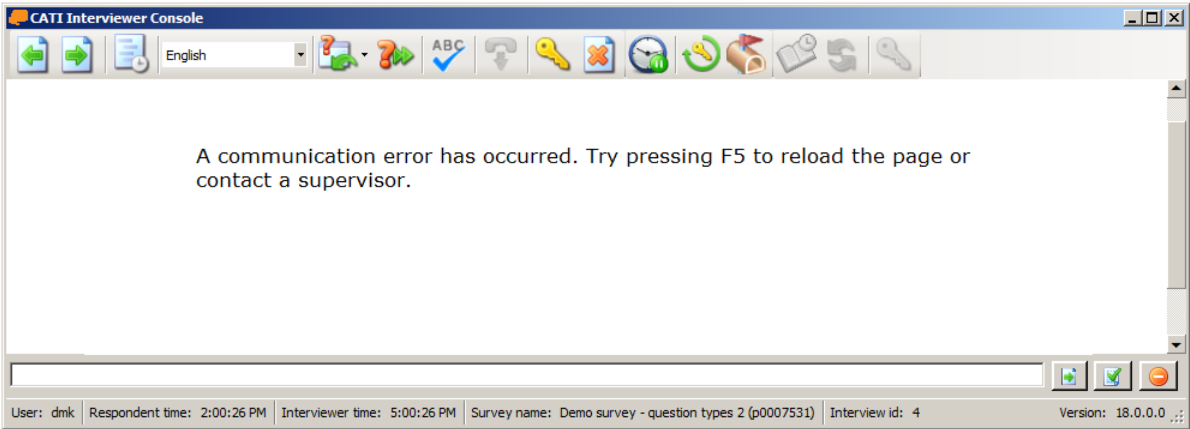


Figure 248 Warning message displayed in Console upon connectivity loss

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 instantly 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 Appendix G - The list of dialer related error messages on page 431.

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.

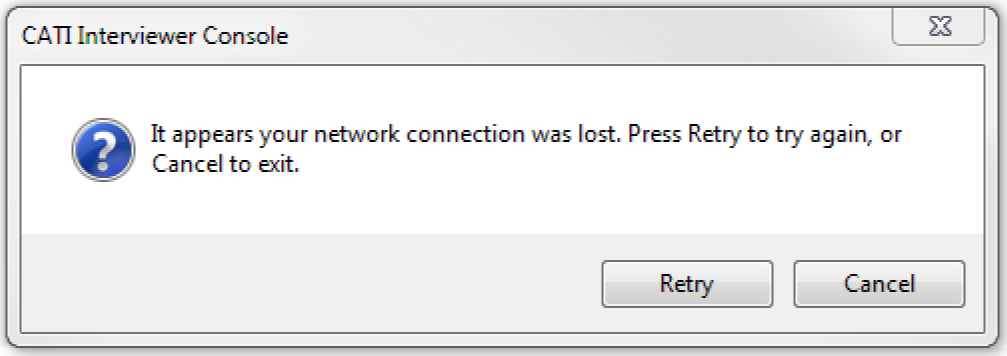
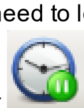


Figure 249 Connection lost during Console service activities

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 Terminating an interview and forcing the interviewer to be logged out on page 314 for instructions).

Taking a break

If you need to leave the desk and your work must be temporarily halted, you can press the Take break button on the toolbar . You cannot take a break while the interview is in progress, but you can take a break 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. Refer to Interviewer on a break on page 273 for more information on taking a break.

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. Refer to Making an appointment on page 274 for details.

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 (see Logging Out and closing the CATI Console window on page 287 for details). An alternative way of logging out is also applicable when the interviewer works in the Manual task choice mode - when the current interview is finished they should press 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 also terminate the current interview immediately without leaving the CATI Console. To do that he/she should press the Terminate current interview button on the toolbar, or press Ctrl+X on the keyboard (see Terminating an interview on page 285 for details).

The finished interview

The interview is considered finished when all interview questions are answered.

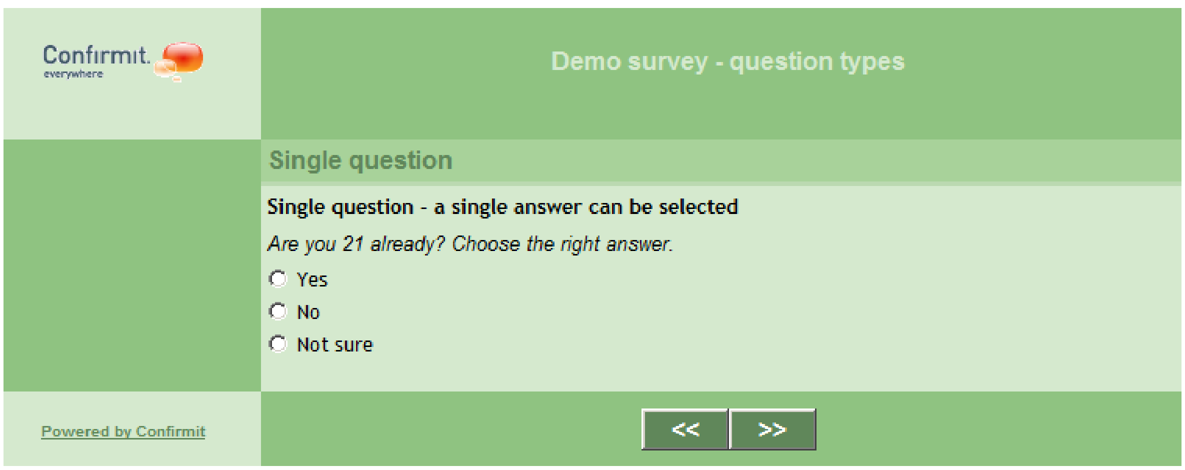
6.7.2 Question Types

A question of a certain type is a question that requires an answer in a certain format. Also, the particular question type may use a special layout which aids in entering data in the required format.

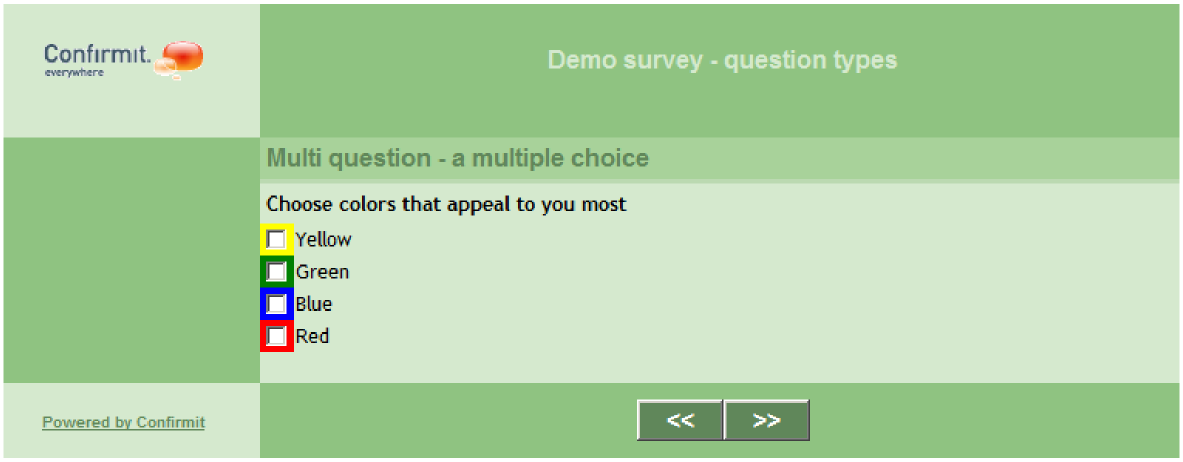
There are 10 basic question types that you can come across in an interview. Of course, not necessarily all of them can be met in a single interview.

These are the question types used in Confirmit surveys.

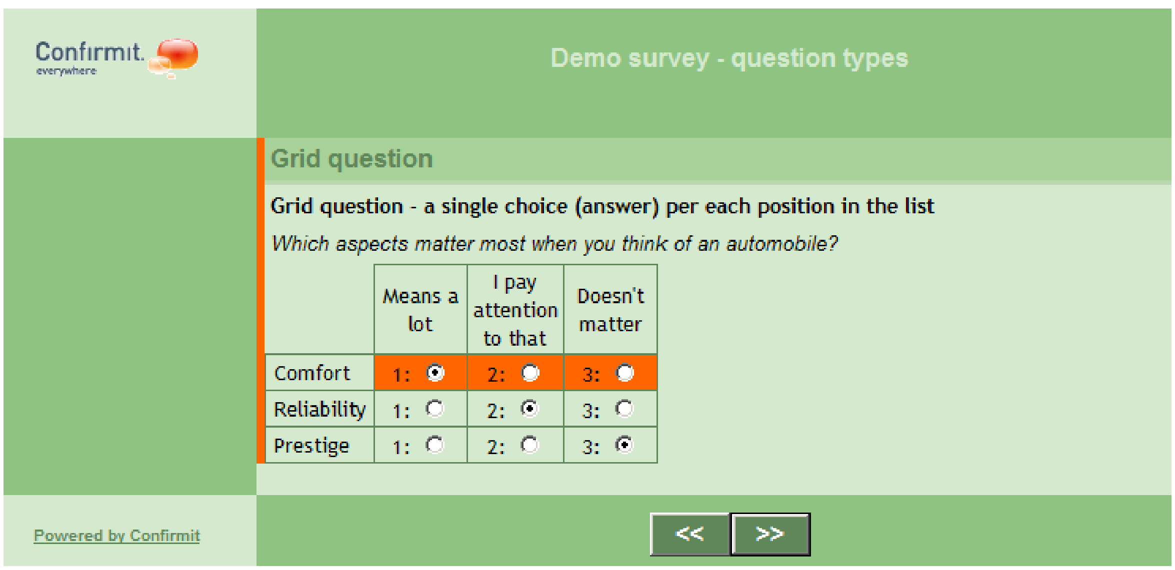
- **Single** question - a single-answer question. You can select only one answer from a list. Can be presented in a form of a radio button list, or as a drop-down list (show me);



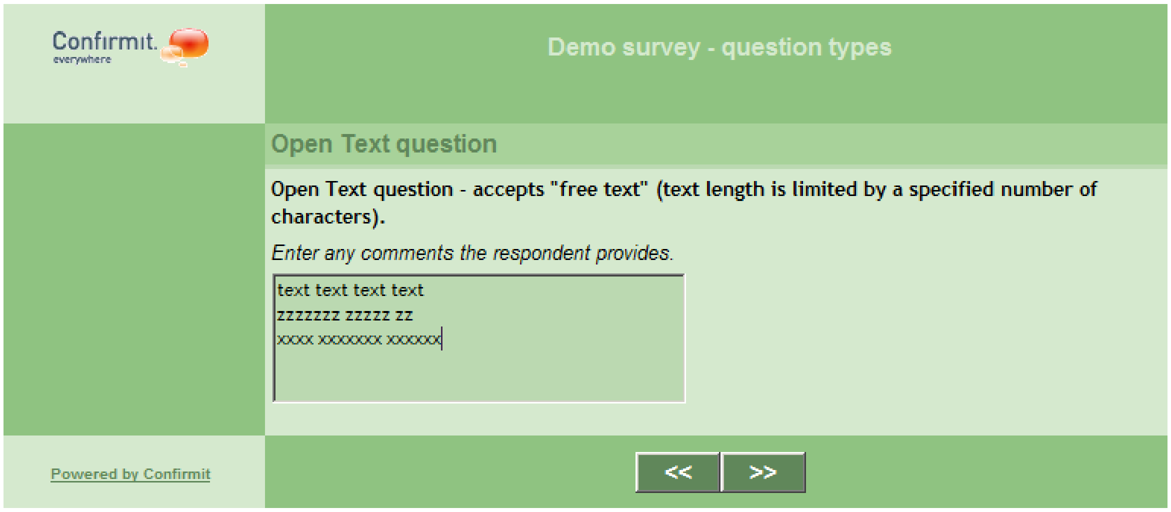
- **Multi** question - a multi-answer question. You can select several answers from a list. Usually presented as a checkbox list (show me).



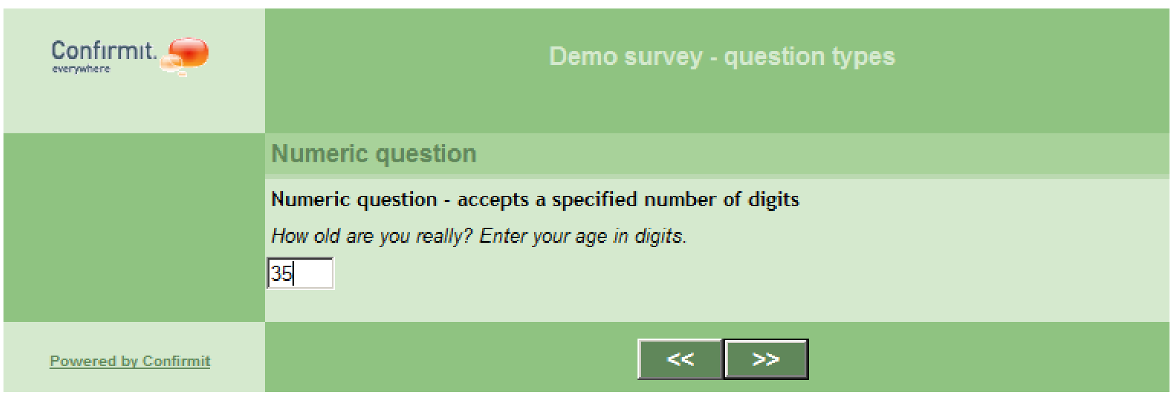
- **Grid** question - a question type that lets you evaluate a list of items along a scale. This question is presented in tabular format, where you can select an answer on a scale. This type of question is typically used to give products or statements a rank or score on a scale (show me).



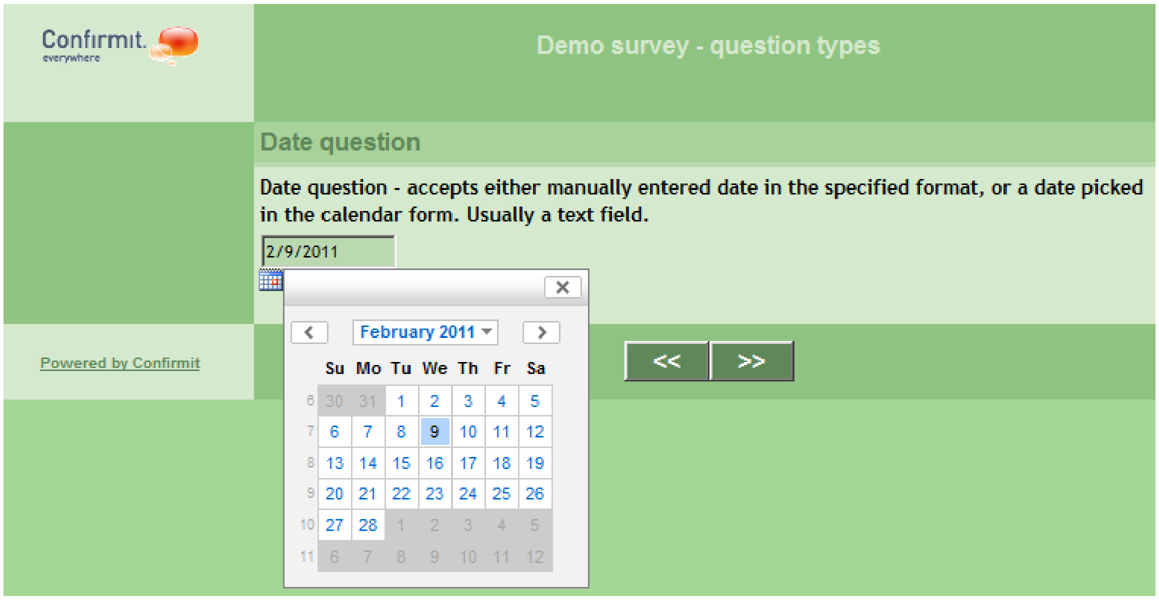
- **Open Text** question - a question type that allows you to type in the response using "free text". Simply a text box (show me).



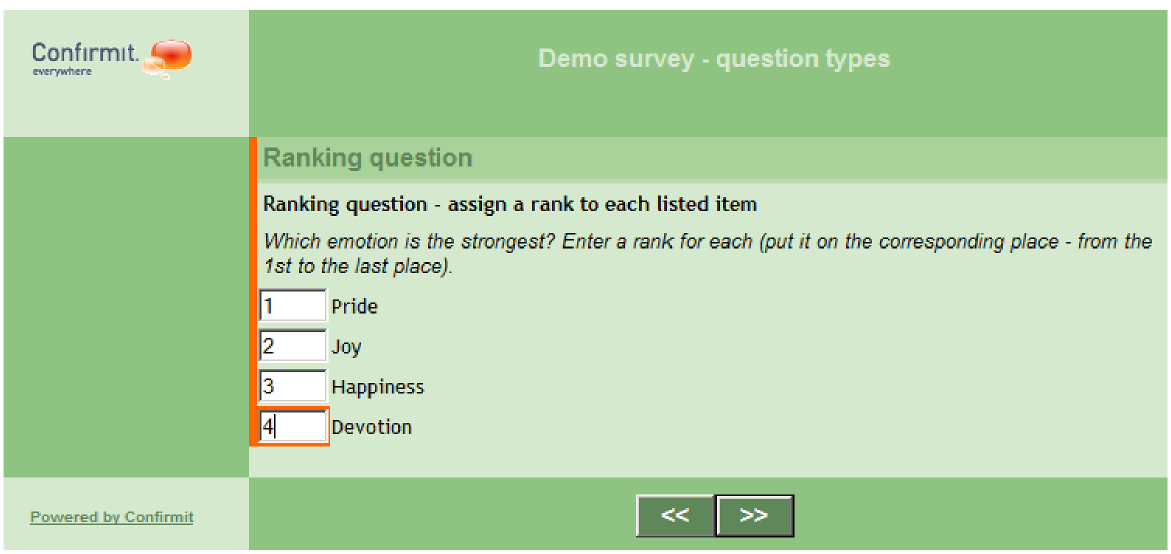
- **Numeric** question - a question type that allows you to type in numerical answers. A text box which accepts only numeric characters (show me).



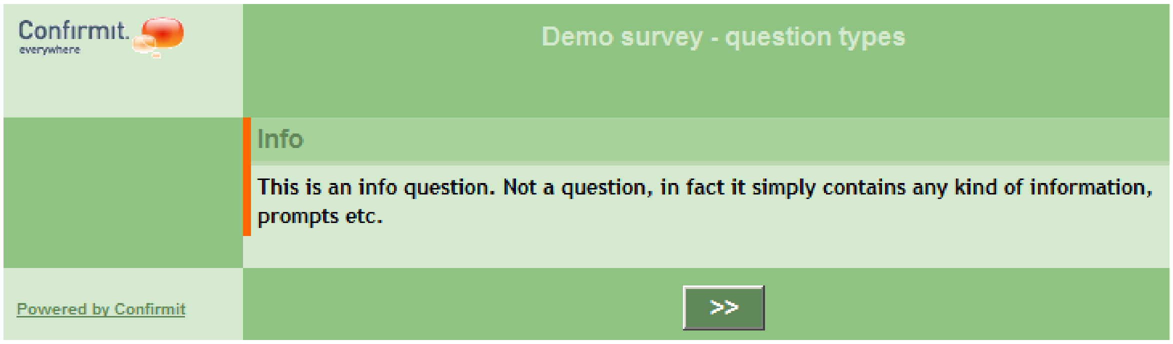
- **Date** question - a question type that allows you to input a date as the answer. A special button beside the text box displays the calendar using which you can select a date. Selecting a date using the calendar is the best way since it guarantees that the date is entered in the correct format (show me).



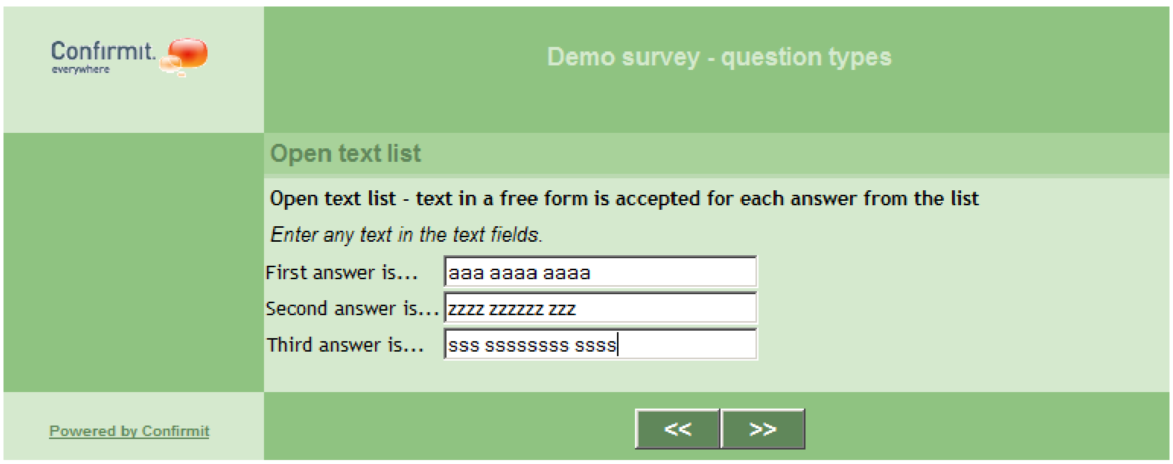
- **Ranking** question - a question type that allows you to rank a list of options, for example to place them in order of preference. A list of items accompanied by text boxes. For example, to rank a list of eight cars you must type 1 into the box beside the car you liked the most, 2 into the box beside the car you thought was second-best, and so on until you have typed 8 into the box beside the car you liked the least. The ranking must be indicated using numbers, the numbers must start from 1, and they must be consecutive (show me).



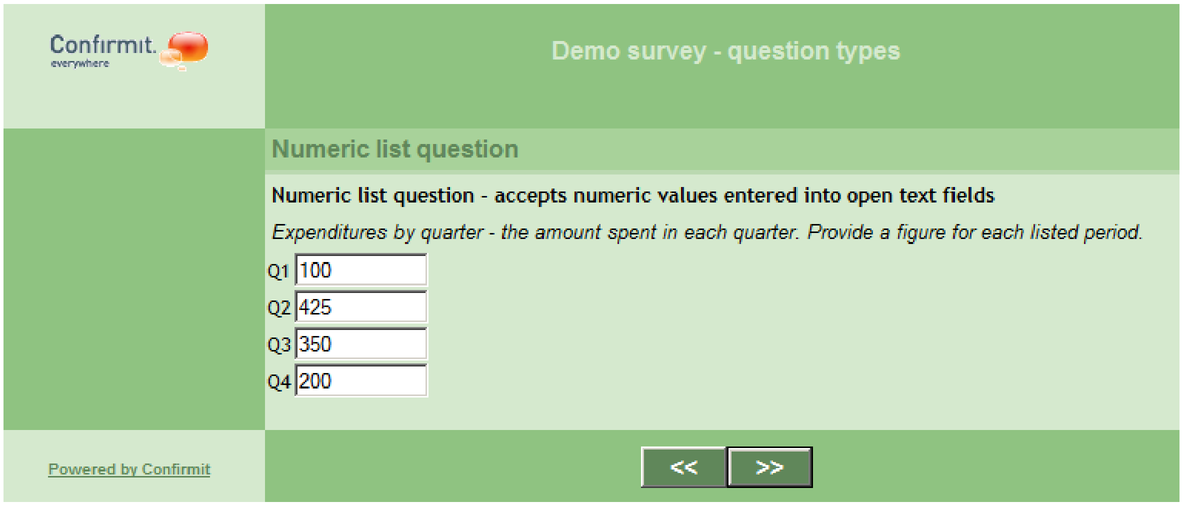
- **Info** question - not a question in fact. This is just an information area. No input is required (show me).



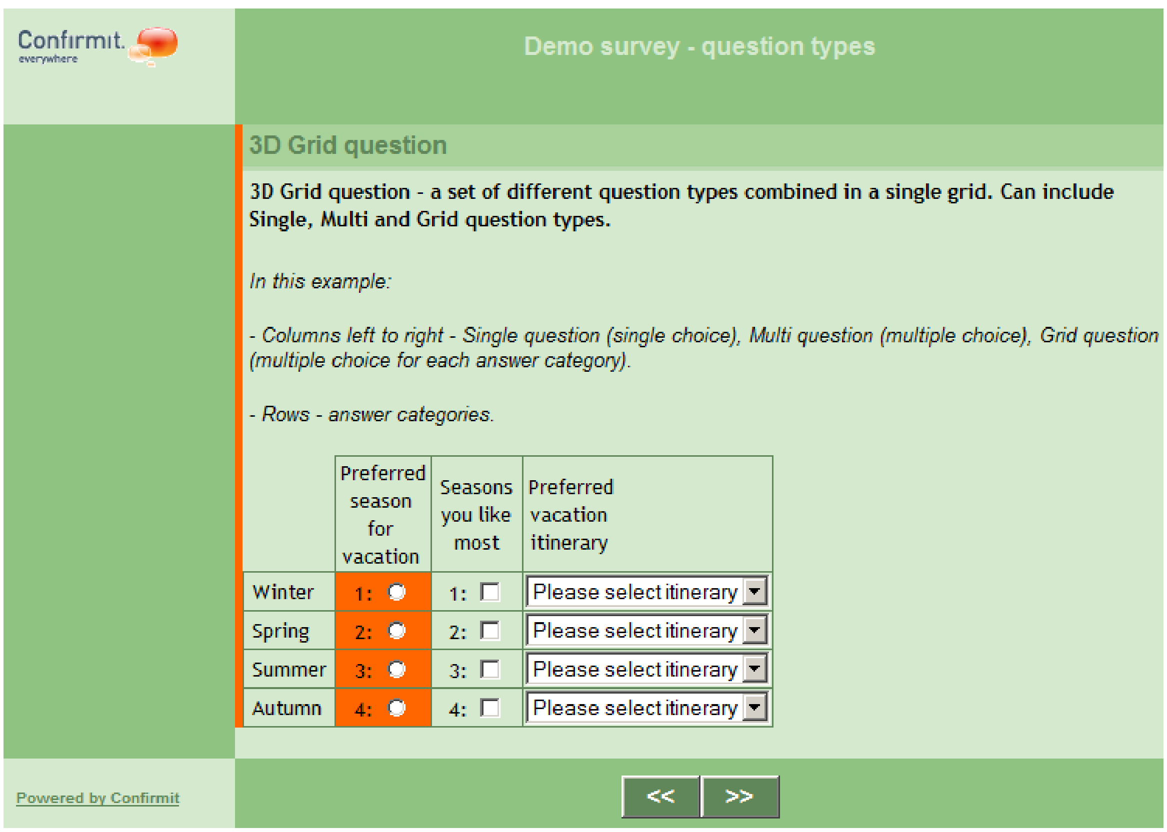
- **Open Text List** question - a question type that allows you to type "free text" against a list of options, for example to add comments to a list. This is a set of Open Text questions combined in a single question (show me).



- **Numeric List** question - a question type that allows you to add numerical answers to a list of options. This is a set of Numeric questions combined in a single question (show me).



Also there is a question type that can combine a number of question types and present them as a grid. Such question type is called a **3D Grid** question. It allows combining Single, Multi, and Grid questions in an aggregated grid structure, so that it resembles a Grid question. In fact this is simply a combination of already mentioned question types presented in a single layout (show me).



Note that different control elements can be used on the question pages - these can be drop-down lists, sliders.. But whatever method is used to select answers, the type of this question remains the same, and it can easily be identified using the above list.

6.7.3 Keyboard support in the CATI Interviewer Console

CATI Interviewer Console supports commands which are performed by pressing a combination of keyboard keys. This chapter contains a complete reference of such hot key combinations, possible usage hints, and a list of limitations.

Question types referenced to in the present topic are described in Question Types on page 262.

Keyboard commands corresponding to a certain CATI Console functionality are listed in the corresponding topics.

6.7.3.1 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.

Press 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.

6.7.3.2 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.

6.7.3.3 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 Appendix C - The list of hot key combinations used with CATI Interviewer Console on page 425.

Note that by default the first question on the page is always highlighted.

Note: If the user presses any of the below listed key combinations, the action should be executed even if the keyboard entry text box is not selected. This should also lead to selection of the keyboard entry text box.

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. Press Enter to submit the text currently entered in the keyboard entry box. Press Enter again to submit the question.

6.7.3.4 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).

Comments concerning this topic? Send an email

6.7.3.5 Taking a break

The interviewer can leave his desk for a short while. Before he leaves the desk he must switch the Interviewer Console to the Break mode, and switch the Console back to the normal working mode when he returns. Please refer to Interviewer on a break on page 273 for complete instructions on the Break functionality.

Switching to the Break mode and back from the Break 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 similar to the toolbar button - one hotkey combination press equals one press of the Take a Break toolbar button.

Note that the Break mode is activated differently in different situation - 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.

While the Console waits for the interview finish to switch to the Break mode you can deactivate this waiting by pressing the hotkey combination Ctrl+B again. The Take a Break toolbar button returns to the normal state to indicate that switching to the Break mode will not be performed.

When there is no active interviews (the current interviewer is either selecting an interview, or waiting for an interview to be delivered), pressing the Ctrl+B hotkey combination will instantly switch you to the Break mode.

6.7.3.6 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.

6.7.3.7 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,c 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. Press the Enter key to make the selection in the form.

Note: to unmark 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.

6.7.3.8 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.

6.7.3.9 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 not supported for all listed above questions except the "Dropdown" questions.

6.7.3.10 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.

6.7.3.11 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.

6.7.3.12 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.

6.7.3.13 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.

6.7.4 Interviewer on a break

Any interviewer is allowed to leave his/her working place for a short period of a time. If he/she does so, they should inform the system of their absence by manually changing their login status. CATI Interviewer Console provides a way to do that by pressing the Take Break button on the console toolbar.

Since the interviewer is not allowed to leave the desk while the interview is in progress, he/she can do that after the current interview is finished, and another one is not started yet. The complete instruction regarding taking a break can be found further in this topic.

So, while the interviewer conducts an interview, the Take Break button acts like a toggle button - when the interviewer presses this button, it stays in the depressed state until the interview is finished. When the interview is finished, CATI Interviewer Console switches to the Break mode and displays the appropriate interface.

When the interviewer presses the Take Break button while selecting a survey/interview, CATI Interviewer Console instantly switches to the Break mode (and displays the appropriate interface).

Please read Taking a break on page 269 regarding the hotkey combination used to activate and de-activate the Break mode.

All time intervals spent by the interviewer for breaks are logged, and are available in a number of reports (see Generating the Interviewer Sessions report on page 391, Generating the Interviewer Productivity Report on page 385).

The supervisor can also monitor current interviewer status (if he is currently working, or has left for a break) using the Interviewer List in the Activity Views (see Monitoring interviewers and their work on page 297 for details).

To indicate the interviewer has taken a break:

1. Press the Take Break button  on the CATI Interviewer Console toolbar, or press Ctrl+B hot key combination on the keyboard. Depending on the situation the button will either stay depressed until the current interview is finished (when an interview is in progress), and after that Interviewer Console will switch the console to the Break mode, or this action will instantly switch the console to the Break mode.

   When the Console switches to the Break mode, its interface will look like this (see the picture below).

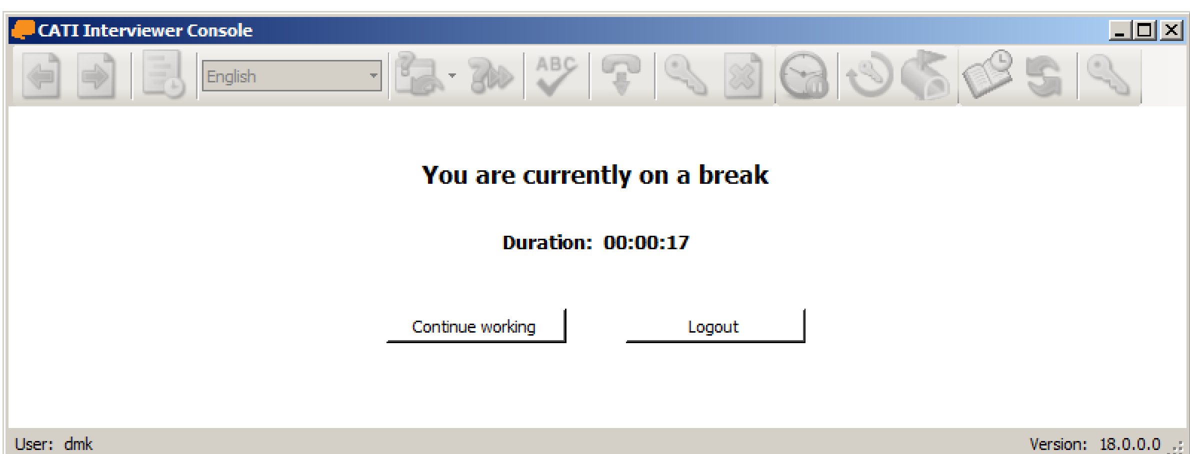


Figure 250 CATI Interviewer Console indicating the interviewer has taken a break

The counter displayed in the Break mode shows the time elapsed from the moment 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.

2. When the interviewer is back, he/she has 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 behavior depends on the current interviewer's task choice mode - in the Manual task choice mode the console switches to the survey/interview selection mode, in other task choice modes it switches to the next interview to be delivered by the system. If the system determines there are no more calls currently assigned to this interviewer, it logs this interviewer out automatically.

   In case the interviewer chooses to log out by pressing the Logout button while in the Break mode, the system instantly logs this interviewer out.

6.7.5 Making an appointment

In case the respondent expresses his will to continue interview at a later time, the interviewer can postpone the interview and make an appointment. This means that he/she creates kind of a reminder in CATI Console, which will activate and start this postponed interview when the time specified in this 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.

Please mind that all appointment times are set for the respondent time zone – not for 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 press the Appointment button , or press Ctrl+A on the keyboard.

   This will display the Appointment dialog window.

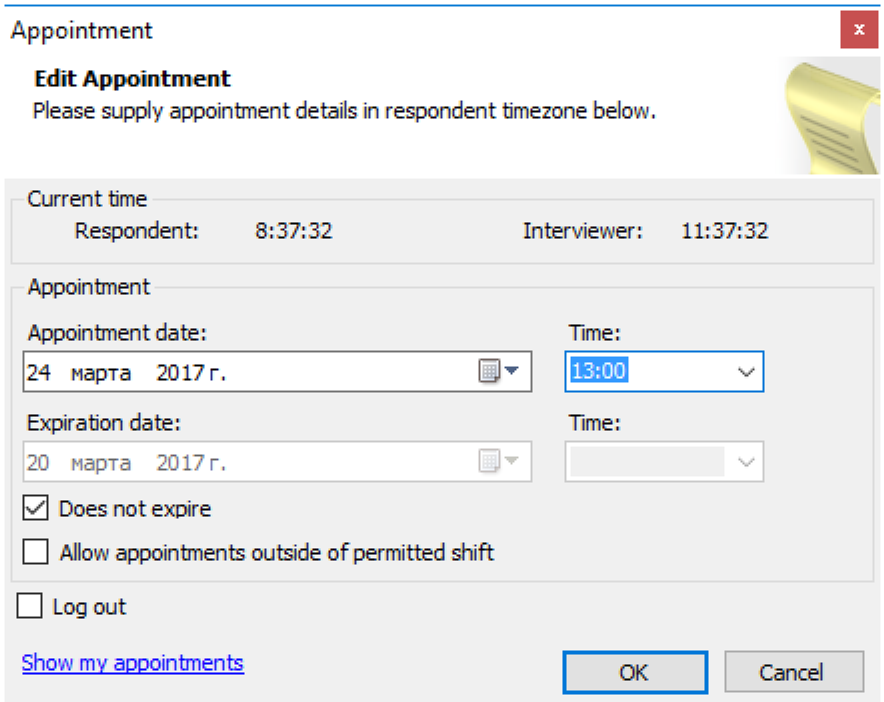


Figure 251 The Appointment dialog window

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 – press the arrow button in the Appointment date field. This will display the calendar form.

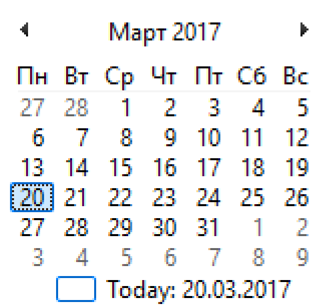


Figure 252 The Calendar form used with the Appointment dialog window

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 press 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 (see Viewing the list of appointments on page 255 for information).

8. Finally press 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 waiting 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.

   Please refer to the instruction above for the detailed procedure description.

6.7.6 Spell checking the answers

Interviewer can check the spelling of the "free text" answers. Spell checking can be invoked during both interview and openend review stage. 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 this word.

The misspelled words are found and displayed in sequence, one after another, thus allowing for consequent check and correction. There is also an option of ignoring a single or all discovered errors in case of a false positive reaction of the spell checker.

To check the spelling of all the words in the text fields on the current page:

1. When you are done typing the text, and after you have pressed Enter (so that the text appears in the corresponding field on the interview page), either press the Spell check button  on the toolbar, or press F7 on the keyboard.
2. This will display the Spell Check dialog.

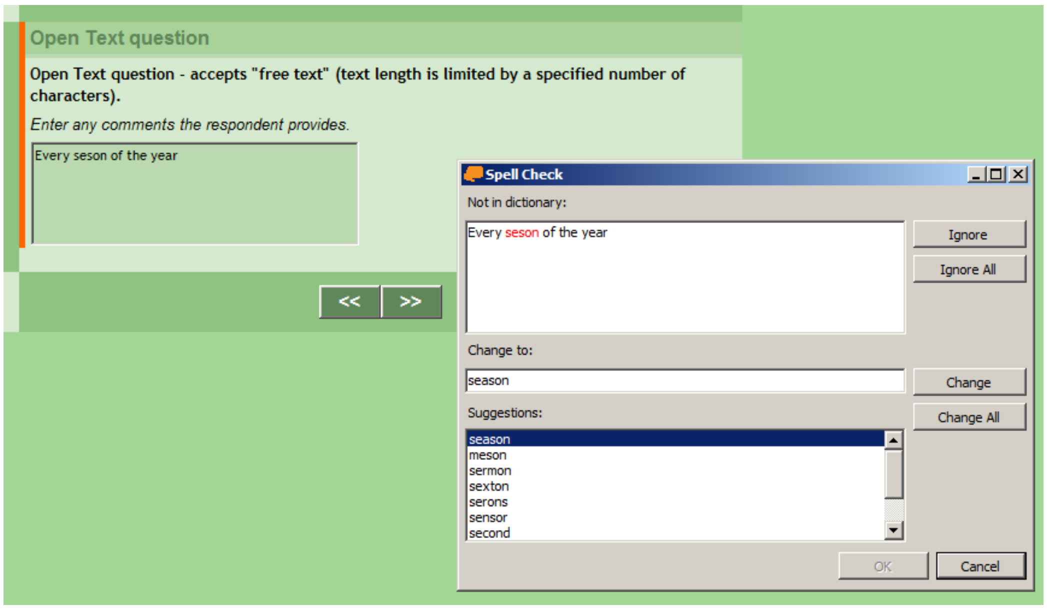


Figure 253 The Spell Check dialog window

3. The Spell Check dialog consists of three fields and a set of buttons.

   The Not in dictionary field consequently displays all the spelling errors and typos it finds throughout 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 press 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 press 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, and the procedure should be 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.

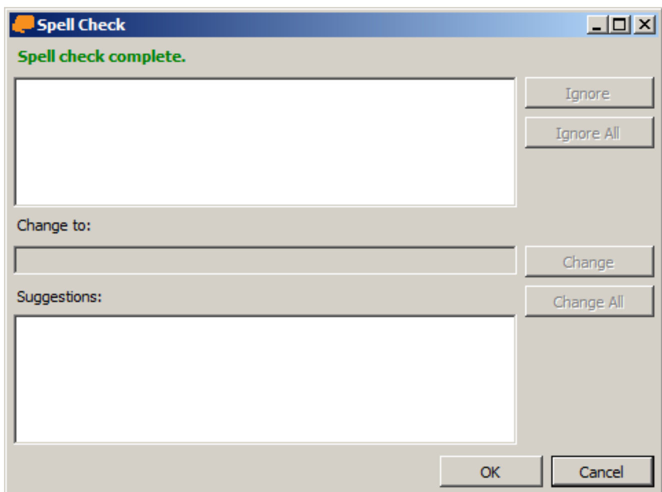


Figure 254 Spell Checker - when the spell checking procedure is completed

Press OK to submit all the corrections you have made using the Spell Check window.

Press Cancel to discard all the changes.

Mind that you can run the Spell Checker again and again to repeat the check. This can be useful if you think you did something wrong when ignoring or editing the suggested correction.

IMPORTANT You should be aware that changes 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 press OK and close the Spell Check window.

Also keep in mind that changes are submitted to the Confirmit server only after the interview page is submitted (and not when the answer text is updated in the interview page).

6.7.7 Modifying an already entered answer variant (and returning back). 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 variant:

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.

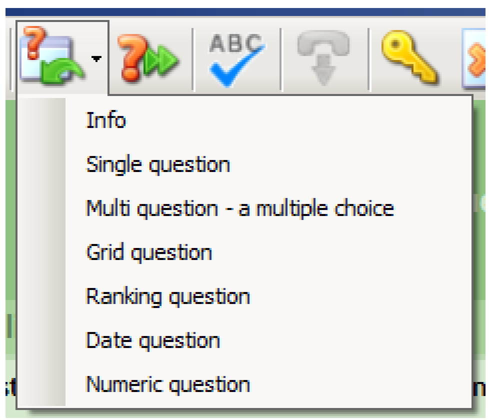


Figure 255 The Redo button drop-out menu

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:
   - press the Next button in the interview page, or
   - press 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 instantly 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 press 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.

6.7.8 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.

6.7.9 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 - please 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.

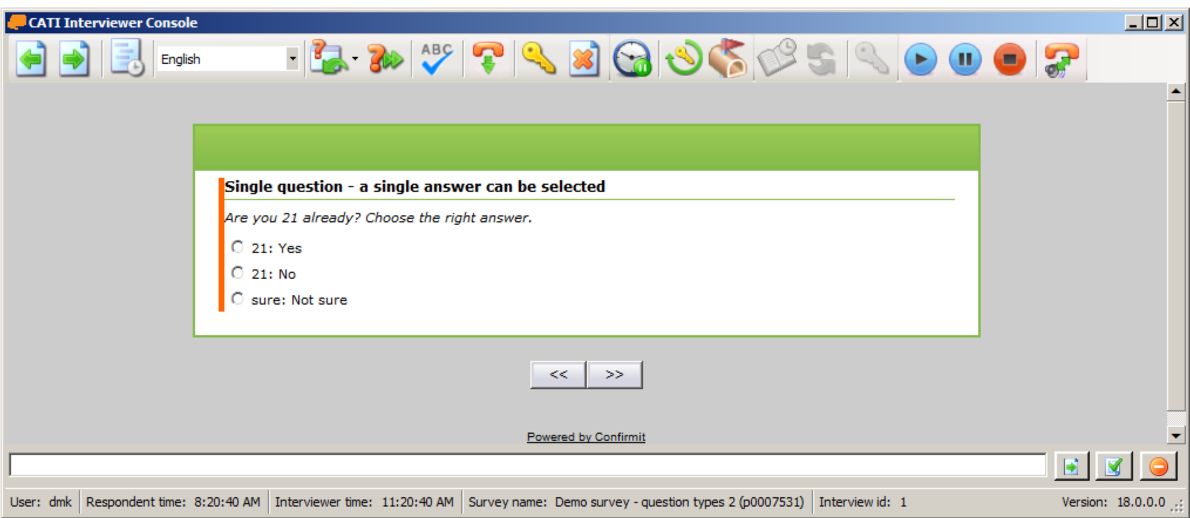


Figure 256 CATI Interviewer Console displaying an extra button set which allows controlling the audio file playback

   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 press 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) - press the Toggle Voice Source button  . This will switch the voice source making the respondent's voice audible. Please note that the respondent will not hear your voice.

6.7.10 The Redial functionality in the CATI Interviewer Console

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 instantly, 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;
- 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), please refer to Configuring settings related to the entire company on page 364 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. Press the Redial button  on the CATI Interviewer Console toolbar when the button is available.
2. This displays the Redial dialog window.

[1] The default number is the original number loaded to the ‘TelephoneNumber’ system field as background sample data.

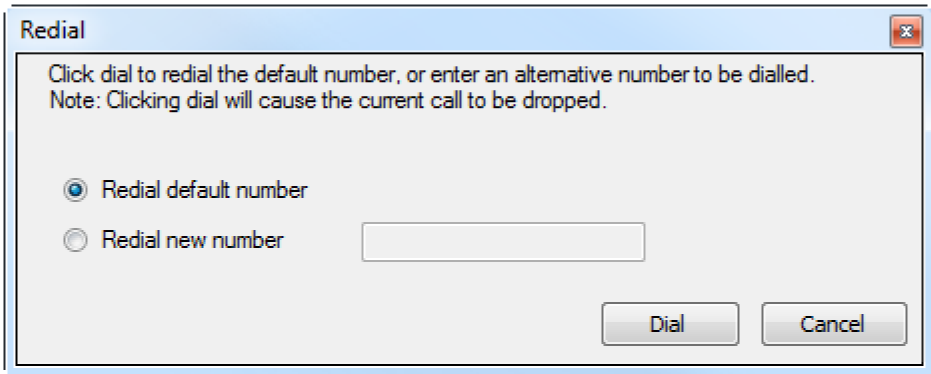


Figure 257 Using the Redial feature

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) you should press the Dial button. The current telephone connection (if such exists) is dropped instantly after the Redial button is pressed. 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.

   Please 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. Please refer to the Confirmit Scripting Manual for more information regarding the ‘AlternativeNumber’ survey variable.

6.7.11 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, press 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.

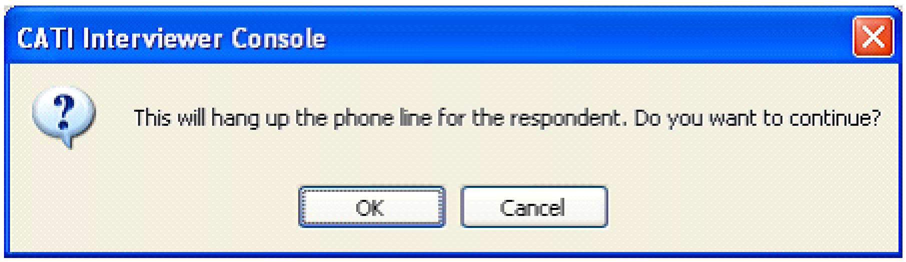


Figure 258 Confirming the respondent line hang up

Choose OK to hang up the respondent line, or choose Cancel to continue the talk.

2. Choose any applicable action after that.

6.7.12 When an interview is aborted due to the 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.

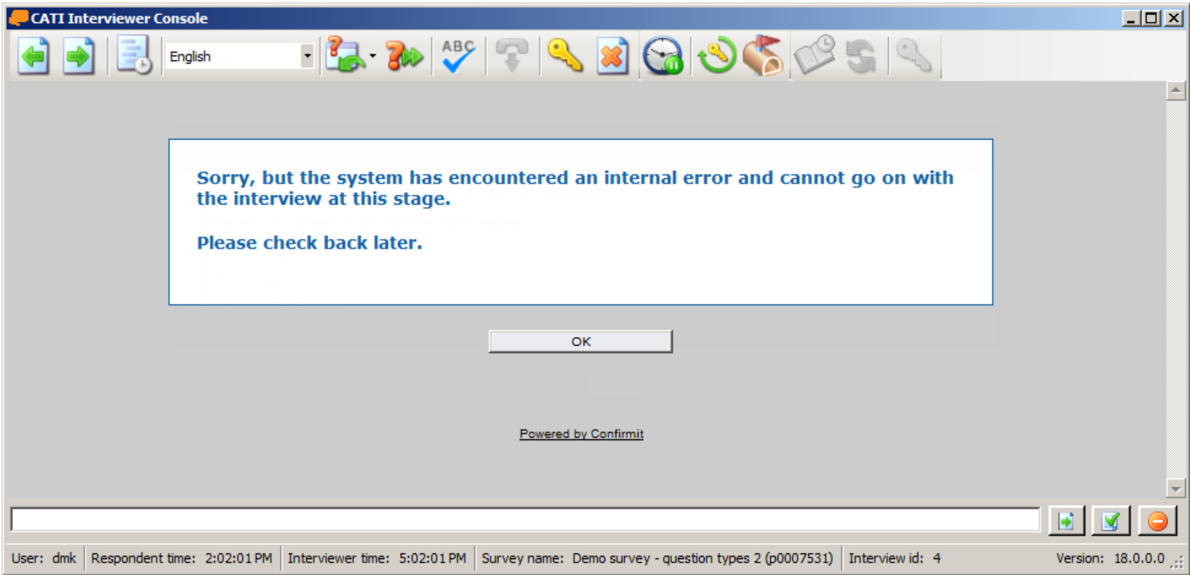


Figure 259 Error message displayed in CATI Console when a survey finishes with an error status.

The interviewer should press OK. This should take him to a new interview, or to an interview selection screen, depending on the task choice mode he is working in.

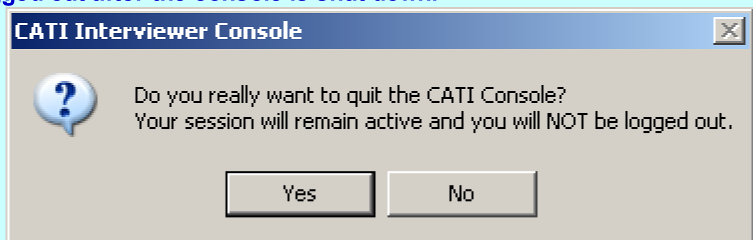
6.7.13 Terminating an interview

The interviewer may need to terminate the current interview until 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.

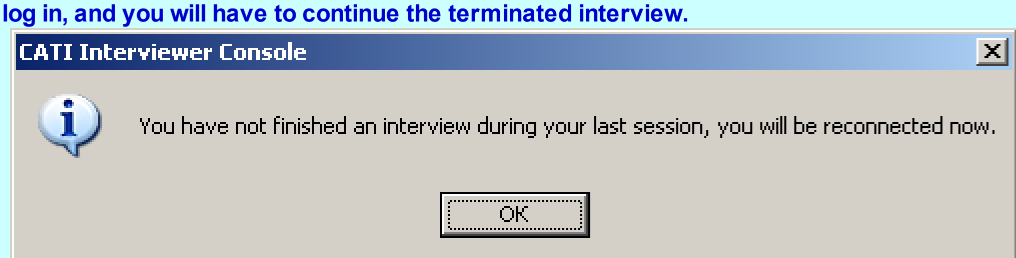
A normal procedure of terminating an interview is described in the instruction below.

Be aware that the interviewer can also shut down the CATI Interviewer Console while the interview is in progress, which will close the Interviewer Console window, 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. Read the note below regarding this matter.

NOTE The interviewer can intentionally 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 a normal way to close CATI Console. When CATI Console is closed in that 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.



Press Yes to shut down CATI Console, press 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 press 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.

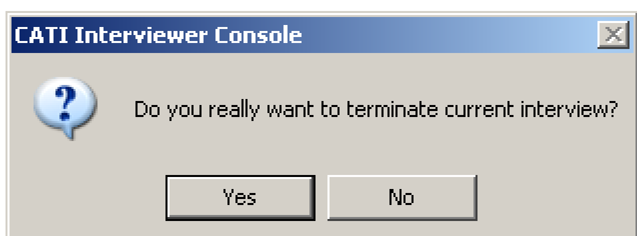


Figure 260 Warning message displayed upon intentional interview termination

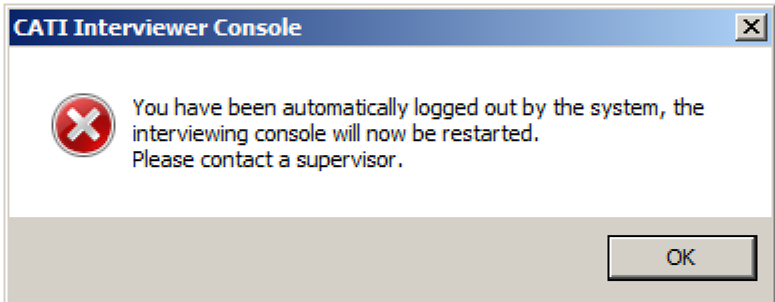
3. Press NO to close this dialog box and continue working with the interview. Press YES to terminate the current interview.
4. When the current interview is terminated, CATI Console starts the next assigned interview.

   If there are no interviews left, CATI Console displays a message suggesting waiting until the next one is assigned to the interviewer.

6.7.14 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 press 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.

6.8 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 press 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.
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 instantly 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. Press 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 instantly 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. Please see Automatic mode on page 249, Survey Selection mode on page 250, and Manual Selection mode on page 251 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 on page 274 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 press 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 press 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.

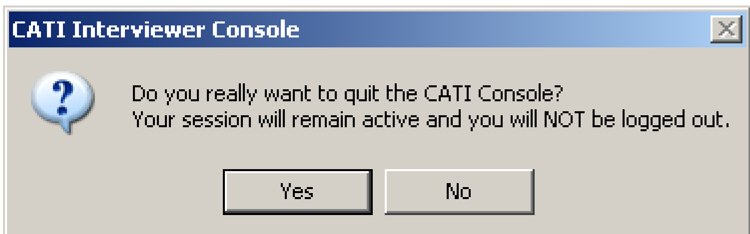


Figure 261 Warning message displayed when the interviewer shuts the CATI Console window

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 - please refer to Selecting a Survey/Interview on page 248 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 object in the left Navigation frame.

All activity views are configurable - the supervisor can access the Activity Views object and choose which activity type he/she wants to monitor. The CATI Supervisor module then displays the list of objects of the selected type, which can be filtered according to a condition. Object lists contain a set of object properties. These lists also allow viewing corresponding alerts pertaining to events that involve particular objects. For example the list of appointments allows specifying time alerts which can show past and due appointments within the specified time range.

All monitoring operations are begun by navigating to the Activity Views object type with the help of the Navigation Menu contained in the CATI Supervisor module left frame.

Activity views for each object are displayed in the dedicated dialog windows. These separate windows are invoked with the help of the List command contained in the context menu for appropriate objects.

A special monitoring activity type is monitoring the interview progress. The supervisor can observe interviewers' work – which interview was selected by the particular interviewer, how much time was spent on each question, what answers were selected etc. This possibility is provided when the CATI Monitoring Console application is installed and launched on the Supervisor's machine.

Supervisor can select a specific object to monitor.

The Activity Views objects are listed in the similar way in the left and in the top right frames. Whatever activity you need to monitor you start with browsing the Activity Views list.

To view the Activity Views list:

1. Click on the Activity Views object name in the left Navigation menu. This will reveal the Activity Views object list in the Navigation frame.

   Simultaneously the same Activity Views object list will be displayed in the top right frame. The list in the top right frame is displayed in the grid and contains item descriptions.

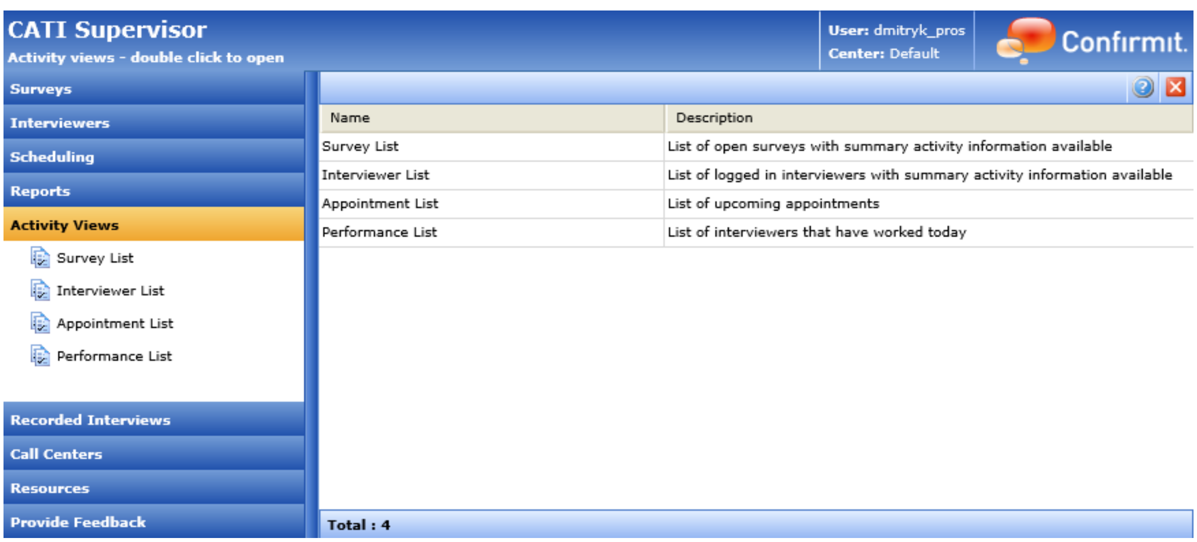


Figure 262 Activity Views object type list

2. Double-click the required object name in this list in the left Navigation frame, or right-click its name and choose List from the shortcut menu.

   Both actions can also be performed for objects listed in the grid in the top right frame.

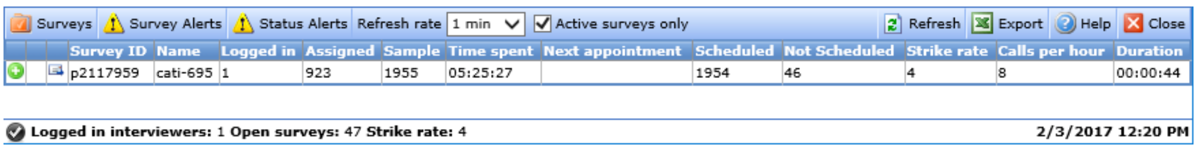
   This will display the list of objects of the chosen type in the dedicated dialog window.

Please refer to Monitoring surveys and survey related events below, Monitoring interviewers and their work on page 297, and Monitoring appointments on page 320 for descriptions of the procedures you can perform working with these windows.

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 (see Monitoring in the CATI Supervisor on the previous page). 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.

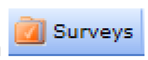


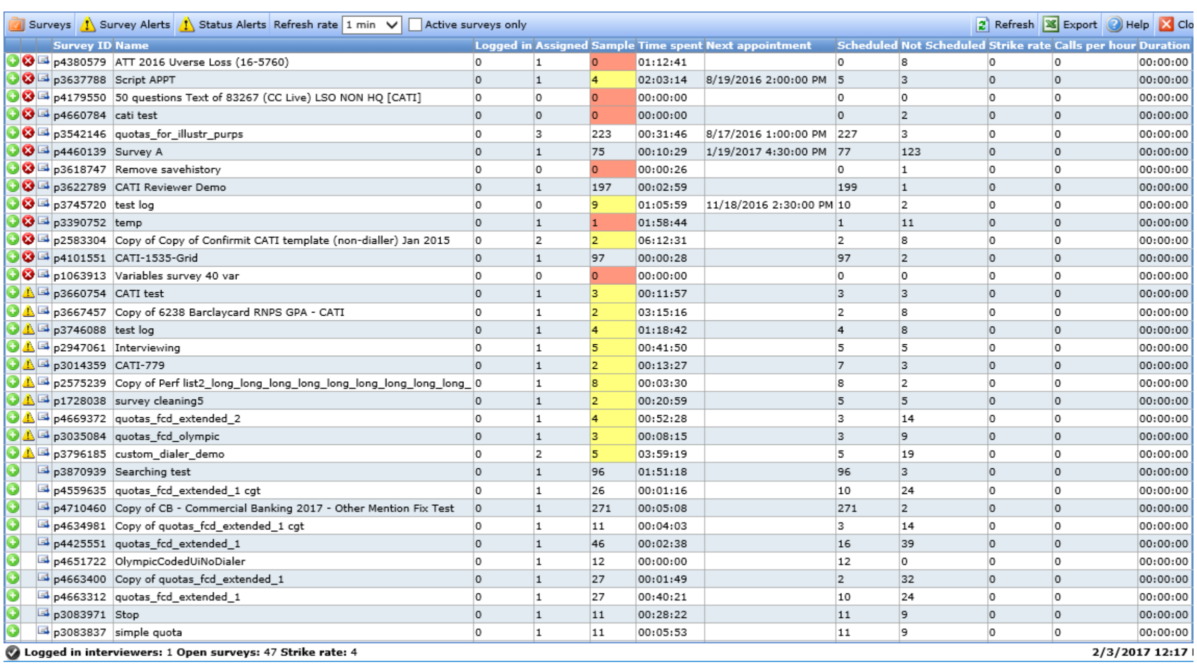
Survey ID	Name	Logged in	Assigned	Sample	Time spent	Next appointment	Scheduled	Not Scheduled	Strike rate	Calls per hour	Duration
p2117959	cati-695	1	923	1955	05:25:27		1954	46	4	8	00:00:44

Logged in interviewers: 1 Open surveys: 47 Strike rate: 4 2/3/2017 12:20 PM

Figure 263 Activity Views - Survey List dialog window displaying the active surveys only

When the supervisor disables the "Active Surveys only" option, the Survey List activity view displays all the surveys that are currently opened.

You can choose to display particular surveys - press the Surveys button  to start selecting surveys (refer to Selecting surveys to display in the grid in the Survey List activity view on page 291 for information on how to choose surveys to show in the Survey List activity view).



Survey ID	Name	Logged in	Assigned	Sample	Time spent	Next appointment	Scheduled	Not Scheduled	Strike rate	Calls per hour	Duration
p4380579	ATT 2016 Uverse Loss (16-5760)	0	1	0	01:12:41		0	8	0	0	00:00:00
p3637788	Script APPT	0	1	4	02:03:14	8/19/2016 2:00:00 PM	5	3	0	0	00:00:00
p4179550	50 questions Text of 83267 (CC Live) LSO NON HQ [CATI]	0	0	0	00:00:00		0	0	0	0	00:00:00
p4660784	cati test	0	0	0	00:00:00		0	2	0	0	00:00:00
p3542146	quotas_for_illustr_purps	0	3	223	00:31:46	8/17/2016 1:00:00 PM	227	3	0	0	00:00:00
p4460139	Survey A	0	1	75	00:10:29	1/19/2017 4:30:00 PM	77	123	0	0	00:00:00
p3618747	Remove savehistory	0	0	0	00:00:26		0	1	0	0	00:00:00
p3622789	CATI Reviewer Demo	0	1	197	00:02:59		199	1	0	0	00:00:00
p3745720	test log	0	0	9	01:05:59	11/18/2016 2:30:00 PM	10	2	0	0	00:00:00
p3390752	temp	0	1	1	01:58:44		1	11	0	0	00:00:00
p2583304	Copy of Copy of Confirmit CATI template (non-dialler) Jan 2015	0	2	2	06:12:31		2	8	0	0	00:00:00
p4101551	CATI-1535-Grid	0	1	97	00:00:28		97	2	0	0	00:00:00
p1063913	Variables survey 40 var	0	0	0	00:00:00		0	0	0	0	00:00:00
p3660754	CATI test	0	1	3	00:11:57		3	3	0	0	00:00:00
p3667457	Copy of 6238 Barclaycard RNPS GPA - CATI	0	1	2	03:15:16		2	8	0	0	00:00:00
p3746088	test log	0	1	4	01:18:42		4	8	0	0	00:00:00
p2947061	Interviewing	0	1	5	00:41:50		5	5	0	0	00:00:00
p3014359	CATI-779	0	1	2	00:13:27		7	3	0	0	00:00:00
p2575239	Copy of Perf list2_long_long_long_long_long_long_long_long_long_	0	1	8	00:03:30		8	2	0	0	00:00:00
p1728038	survey cleaning5	0	1	2	00:20:59		5	5	0	0	00:00:00
p4669372	quotas_fcd_extended_2	0	1	4	00:52:28		3	14	0	0	00:00:00
p3035084	quotas_fcd_olympic	0	1	3	00:08:15		3	9	0	0	00:00:00
p3796185	custom_dialer_demo	0	2	5	03:59:19		5	19	0	0	00:00:00
p3870939	Searching test	0	1	96	01:51:18		96	3	0	0	00:00:00
p4559635	quotas_fcd_extended_1 cgt	0	1	26	00:01:16		10	24	0	0	00:00:00
p4710460	Copy of CB - Commercial Banking 2017 - Other Mention Fix Test	0	1	271	00:05:08		271	2	0	0	00:00:00
p4634981	Copy of quotas_fcd_extended_1 cgt	0	1	11	00:04:03		3	14	0	0	00:00:00
p4425551	quotas_fcd_extended_1	0	1	46	00:02:38		16	39	0	0	00:00:00
p4651722	OlympicCodedUiNoDialer	0	1	12	00:00:00		12	0	0	0	00:00:00
p4663400	Copy of quotas_fcd_extended_1	0	1	27	00:01:49		2	32	0	0	00:00:00
p4663312	quotas_fcd_extended_1	0	1	27	00:40:21		10	24	0	0	00:00:00
p3083971	Stop	0	1	11	00:28:22		11	9	0	0	00:00:00
p3083837	simple quota	0	1	11	00:05:53		11	9	0	0	00:00:00

Logged in interviewers: 1 Open surveys: 47 Strike rate: 4 2/3/2017 12:17

Figure 264 Activity Views - Survey List dialog window

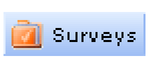
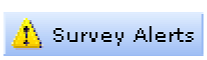
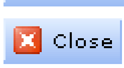
The Survey List dialog window provides the Supervisor with the following information (presented in the grid columns, left to right, starting from the 4th column):

- Survey ID
- Name - Survey name
- Logged in - The amount of currently logged in interviewers
- Assigned - The amount of interviewers this survey is assigned to
- Sample - The sample size
- 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 Monitoring survey calls and their status on page 295 for details). The alert indicator displays alerts pertaining to different survey parameters (see Setting up survey alerts on page 293 and Setting up extended status alerts on page 295for details). The Send Message button allows creating and sending messages to interviewers (see Sending messages to interviewers on page 311 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
	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.
Check box	ACTIVE SURVEYS	Allows showing only surveys that have at least one interviewer performing an interview currently while hiding all the other surveys.
Drop-down list	REFRESH RATE	Allows specifying how often the survey list should be updated to reflect the most recent parameter values
	EXPORT	Allows exporting currently displayed survey list.
	REFRESH	Allows updating the survey list manually.
	CLOSE WINDOW	Closes the Survey List dialog window.

7.1.1 Selecting surveys to display in the grid in the Survey List activity view

Supervisor can choose which surveys should be displayed in the Survey List activity view. 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 a filter to the survey list.

Besides he/she 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 would not be included into the Survey List activity view.

To select surveys for displaying in the Survey List activity view:

1. Display the Survey List window (see Monitoring in the CATI Supervisor on page 289 for instructions).
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).

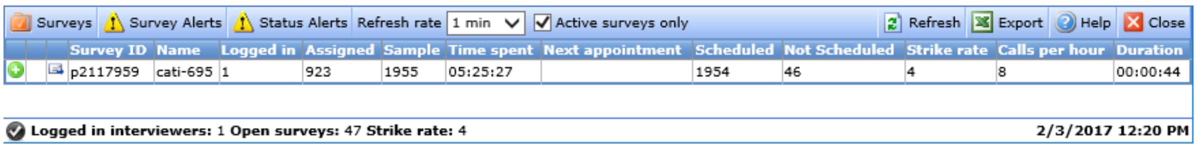
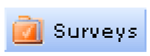


Figure 265 The default Survey List activity view

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. Check the Active Surveys box to view only "Active" surveys (checked by default).

3. Press the Surveys button  on the toolbar. This will display the Select Surveys dialog window.

The Select Surveys window

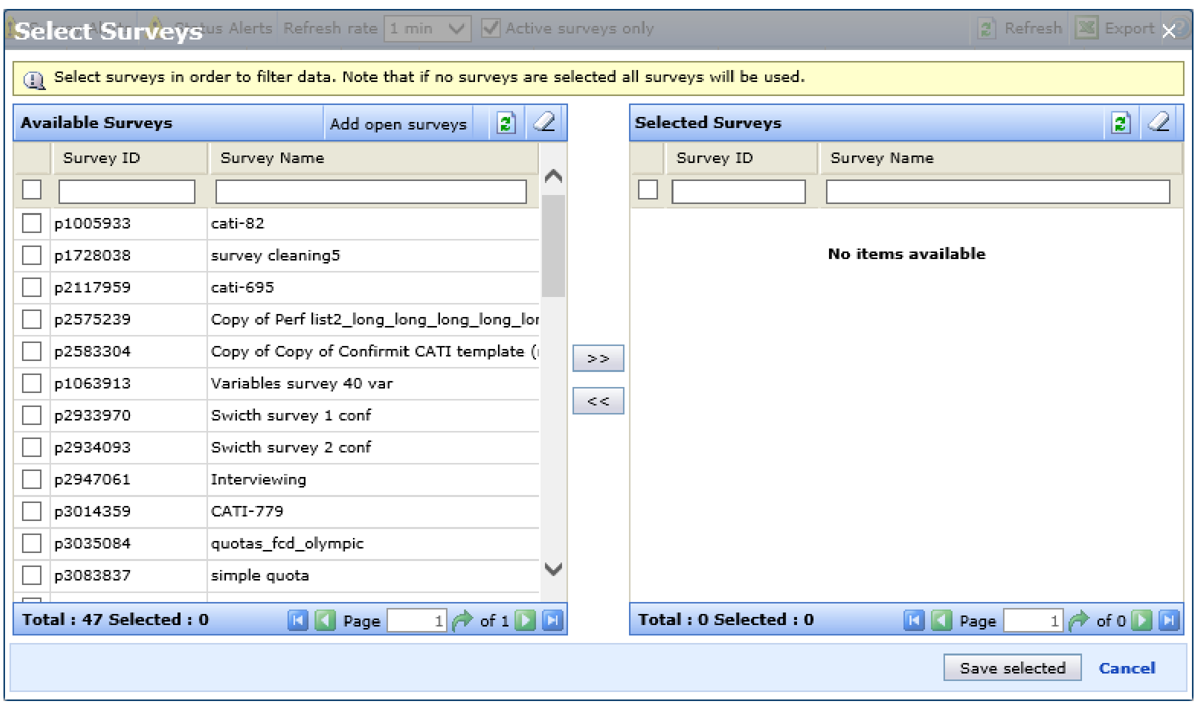


Figure 266 The Select Surveys dialog window - selecting surveys to display in the Survey List

The list of all surveys which you can select to display is shown in the left frame (Open surveys), while the list of surveys which are already displayed is shown in the right frame (Selected surveys).

4. Choose one or a number of surveys in the left frame 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. matching survey and so on until the end of the list is reached.

   Press 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 frame). If you press this button there will be no need for any additional action - all open surveys will disappear from the left frame and appear in the right one.

   To remove surveys from the list of selected surveys choose one or a number of surveys in the right frame (already selected surveys are displayed in the right frame) 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 frame (Selected Surveys) to the left frame (Open Surveys). After you select the required surveys in the right frame, press the arrow button pointing to the left, and this will move these selected surveys to the left frame, into the list of open surveys.

5. Both frames can be configured simultaneously: check or clear boxes in both frames, press the arrow buttons. All the changes are introduced to the Survey List only after you press the Save selected button. When you are done moving surveys between the frames, press the Save selected button at the bottom of the dialog window. This will close the dialog window and apply the changes to the Survey List dialog window, leaving visible only the Selected surveys and hiding all other surveys.

7.1.2 Setting up survey alerts

Monitoring is about watching the state of a number of survey parameters. CATI Supervisor automates monitoring process by providing a configurable visual alert facility.

Second to left column contains the alert indicator which shows whether some survey parameter value has reached or exceeded the threshold that was specified for this parameter.

Parameter threshold values are specified in the dedicated form.

Normally, when the parameter value does not near, or exceed the specified threshold, the alert indicator cell in the grid for the corresponding survey stays blank.

When the parameter value reaches the specified threshold, the indicator changes to the amber triangle with the exclamatory sign , and when it exceeds the specified threshold, the icon changes to the red crossed circle . The affected parameter cell is highlighted in the corresponding color – amber, or red.

In addition, to attract your attention, 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) come first, then come surveys with the amber indicator (value reached for any of the monitored parameters), then come surveys without indication (all parameter values are within the threshold).

To specify alert parameters:

1. Press the Survey Alerts button 

on the window toolbar.

   This will display the Survey Alert form below the button.

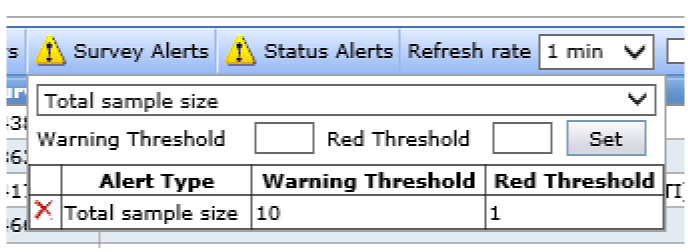


Figure 267 Setting up survey alerts

2. Choose the survey parameter to monitor 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. Press Set to activate the specified threshold. The form will expand and show the configured alert settings in a table.

   Repeat the procedure to specify thresholds for other parameters. Each new alert is added to the table in the form as a new row.

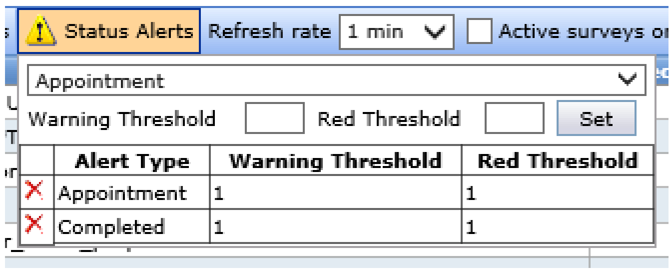


Figure 268 Setting up multiple survey alerts

4. When the grid is refreshed it will display the appropriate alert icons and highlight the corresponding cells (see the picture below).

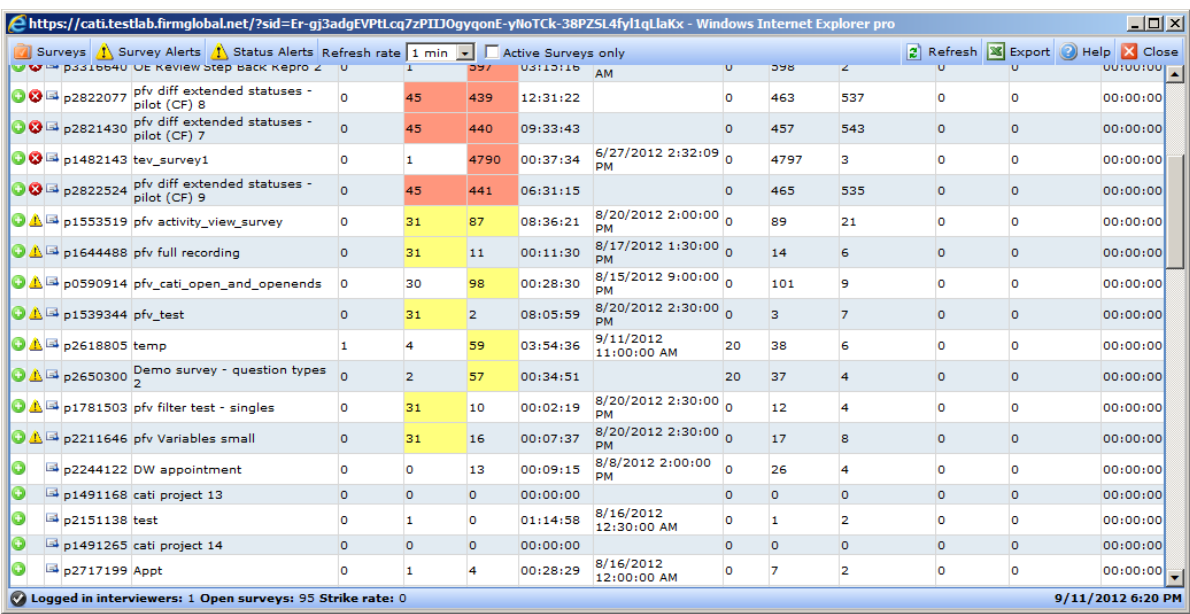


Figure 269 Survey List window displaying the configured alerts

5. If you need to change the alert settings, press 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 press Set to activate modified alert.

6. If you need to remove any alert parameter you should press the Survey Alerts button again, and, after the alert form is displayed, you should press the red cross icon next to the required alert row in the table in this form. The alert is then deleted from the table, and corresponding alerts are unmarked in the Survey List window.

7.1.3 Monitoring survey calls and their status

Normally the list of survey calls is hidden, and the Supervisor has to expand it to observe call amounts and alerts.

When pressed, the Expand button in the leftmost column displays the additional row below the selected grid row. This extra row shows information reagrding the amount of existing calls with different extended statuses (see the picture below). The Expand button turns to Collapse button . To collapse this extra row you should press the Collapse button. It will then turn back to Expand button.

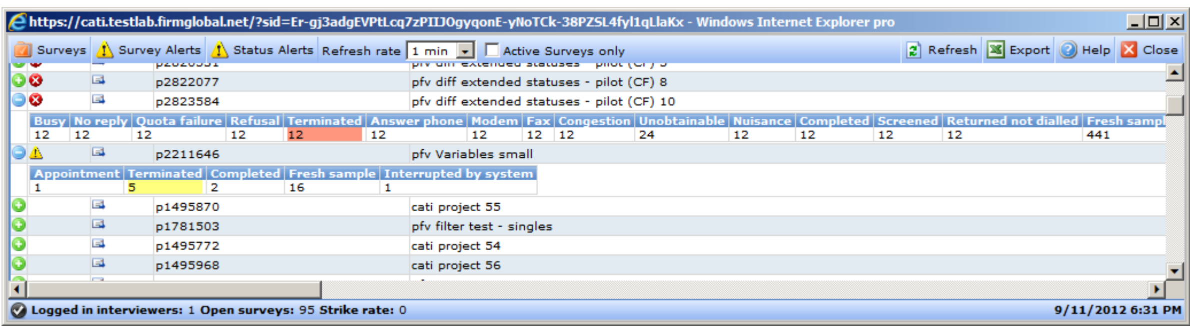


Figure 270 Displaying an extra extended status row in the survey grid

Supervisor can instruct CATI Console to notify him when particular survey parameter reaches the specified threshold, or exceeds it. This is accomplished by setting up the alerts. Alerts can be set up for surveys (for different survey parameters contained in the grid), and for statuses (for different status parameters contained in the extra status row).

Please refer to Setting up survey alerts on page 293 for instructions on setting up the alerts.

7.1.4 Setting up extended status alerts

Status alerts are specified and monitored almost similar to the survey alerts (see Setting up survey alerts on page 293 for instructions on configuring and monitoring alerts).

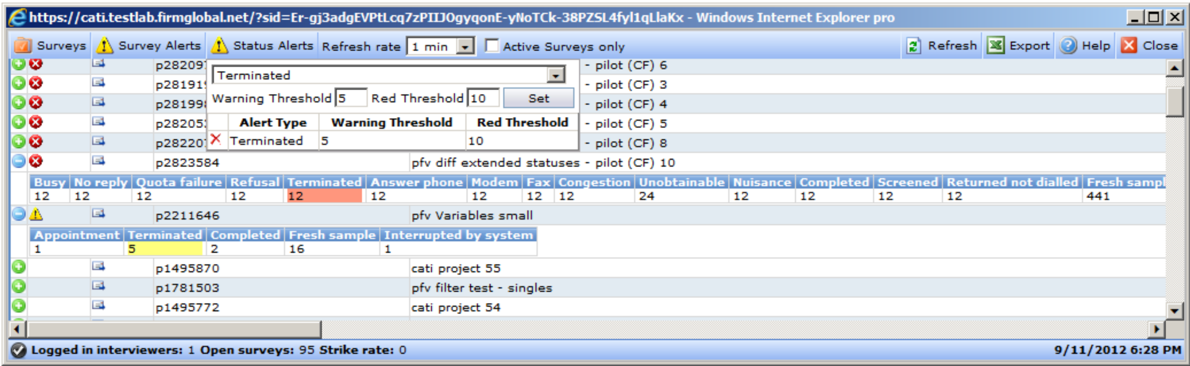


Figure 271 Setting up extended status alerts

The only difference is that CATI Console highlights cells in the extra grid row containing information on survey calls, and you have to expand this extra row to monitor the situation (see Monitoring survey calls and their status on the previous page for details).

7.1.5 Setting up the survey list refresh rate

Supervisor can instruct CATI Console to automatically update the survey list and get the latest parameters.

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 272 Changing the Survey List activity view refresh rate

Alternatively you can always refresh the survey list manually by pressing the Refresh button 

on the toolbar.

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 window (see Monitoring surveys and survey related events on page 290 for details).
2. Set the required survey filter (see Monitoring survey calls and their status on page 295 for instructions).
2. When the Survey List window shows information for the required surveys press 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.

Press the Save button in this dialog box. This will display the standard Windows Save As dialog box. Enter the file name and path to save the file, and press the Save button. The list of monitored surveys is then saved to a file in MS Excel format.

If you press the Open button, the list of monitored surveys is opened in the application which is used by your system by default to view files in MS Excel format.

7.2 Monitoring interviewers and their work

To monitor interviewers and their work supervisor has to choose the Interviewer List from the Activity Views object in the Navigation frame (see Monitoring in the CATI Supervisor on page 289). It is then opened in the Interviewer List dialog window.

The Interviewer List window contains the 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 (see Interviewer on a break on page 273for details on the Break mode).

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.

Please note that in order to monitor interviewing process in the real time you have to start the Monitoring Console, which is installed and launched independently of the CATI Supervisor module. Refer to Downloading the CATI Monitoring Console Installation Files on page 304 for details.

When the monitoring Console is not started only specified alerts are displayed in the window grid.

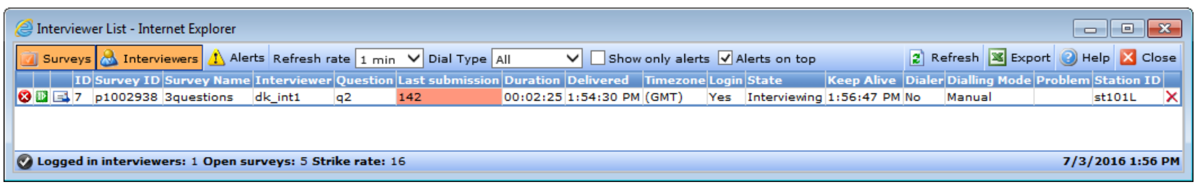


Figure 273 Activity Views - Interviewer List dialog window

The Interviewer List dialog window provides the Supervisor with the following information (presented in the grid columns, left to right, starting from the 4th column):

1. ID - interviewer's ID;
1. Project ID - ID of the project to which the current interview pertains;
1. Project Name - name of the project to which the current interview pertains;
1. Interviewer - interviewer login name;
1. Question - name of the currently active question;
1. Last submission - time spent to submit the last answer (in seconds);
1. Duration - duration of the current interview, or of the break period (in HH-MM-SS format);
1. Delivered - timestamp indicating when the current interview was delivered to the interviewer, or when the break has started (format determined by the system locale);
1. Timezone - interviewer time zone;
1. 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);
1. 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);

1. 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);
1. Dialer - indicates whether the dialer is used by this interviewer, or not;
1. Dialing mode - the dialing mode which the interviewer currently works in;
1. Problem - displays a corresponding error message in case a telephony problem occurs;
2. Station ID - station ID entered by the interviewer at login time.

In case 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 "On break" message, Delivered field shows the time when the break has started, Duration counter shows the duration of the break period.

Three leftmost grid columns are occupied by the alert indicator (blank in case no alerts were triggered, otherwise can show the Red or Amber alert icon - see Setting up interviewer alerts on page 303 for details), Monitoring Console Start/Stop button , and the Send Message button .

The last (rightmost) 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"). Please refer to Terminating an interview and forcing the interviewer to be logged out on page 314 for the procedure description.

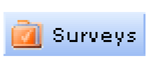
The alert indicator displays alerts pertaining to different interviewing parameters (see Setting up interviewer alerts on page 303 for details).

Monitoring Console Start/Stop button starts or stops (depending on the situation) interviewer work monitoring (see Monitoring interviewer's work in the real time on page 307 for details).

The Terminate button allows for instant termination of the current interview conducted by the selected interviewer (see Monitoring interviewer's work in the real time on page 307 for details).

The Send Message button allows creating and sending messages to interviewers (see Sending messages to interviewers on page 311 for details).

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.
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 Dialing in the Single survey TCPA mode on page 344 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.
	REFRESH	Allows updating the Interviewer Activity View manually.

Export	EXPORT	Allows exporting currently displayed list of interviewer activities.
Close	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. Press the Surveys button Surveys on the toolbar.

   This will display the Select Surveys dialog window. Press the Select button to display the Select Surveys dialog window (see description of this dialog here - Selecting surveys to display in the grid in the Survey List activity view on page 291).

2. Press 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 using which the supervisor can search for interviewers by their names, or can apply a filter to the interviewer list.

Note that when no interviewers are selected all interviewers will be used.

To select interviewers to display in the interviewer list:

1. Press the Interviewers button Interviewers on the toolbar.

   This will display the Select Interviewers/Groups dialog window.

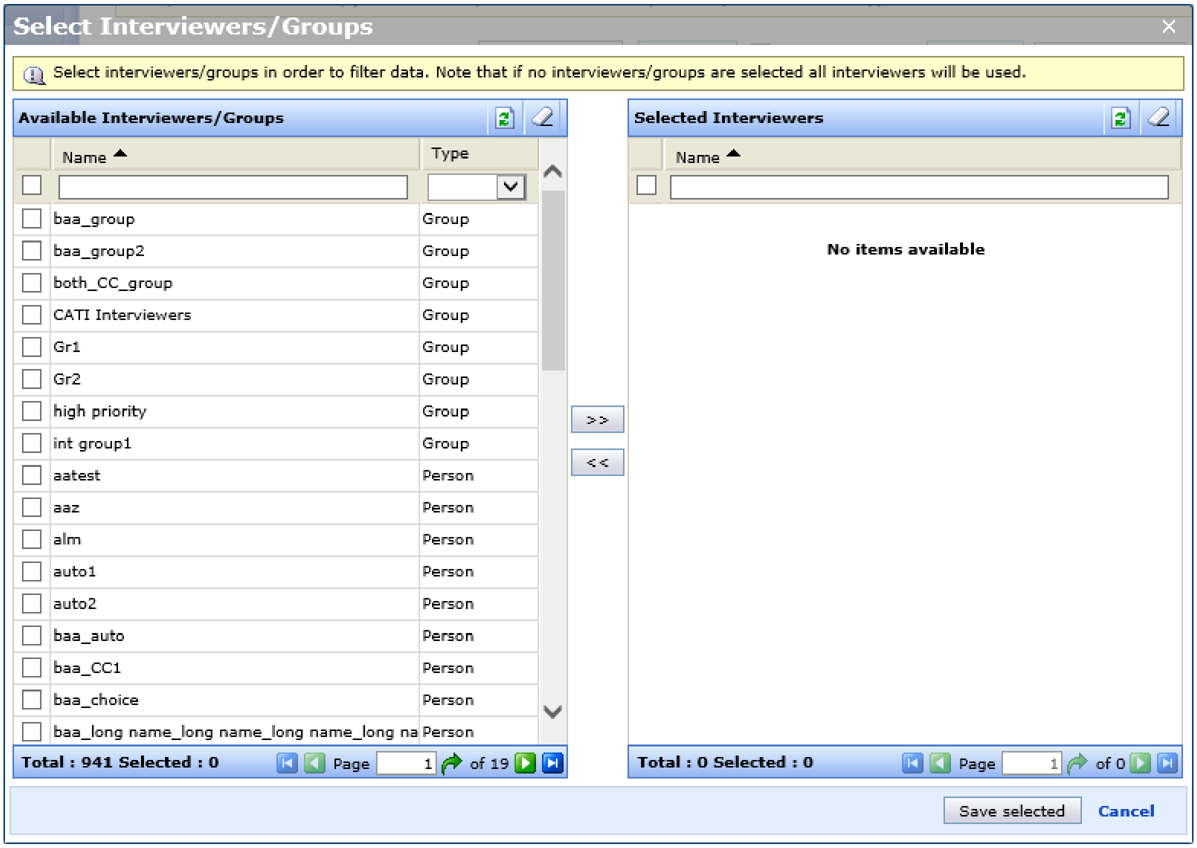


Figure 274

You can select interviewers to be included in this View. When no interviewers are selected the view includes all interviewers working for the current company.

Please refer to Selecting interviewers or interviewer groups on page 377 for description of this dialog.

2. Press Save selected in this dialog window 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 Interviewer on a break on page 273);
- 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 Monitoring in the CATI Supervisor on page 289), 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.

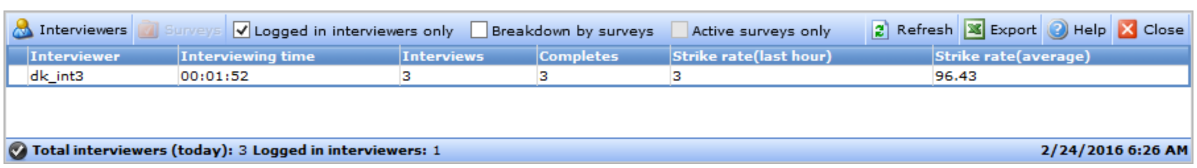


Figure 275 Viewing the Interviewer Performance list

   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.

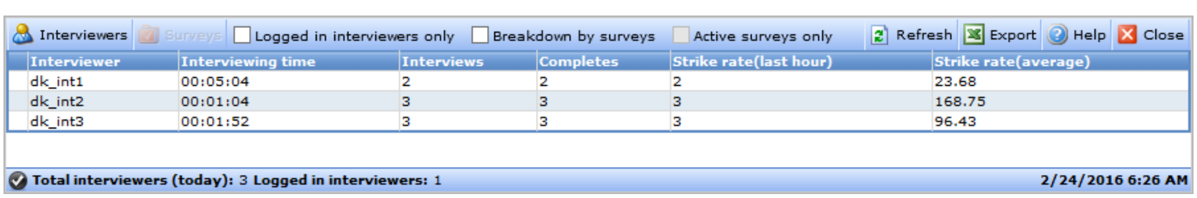
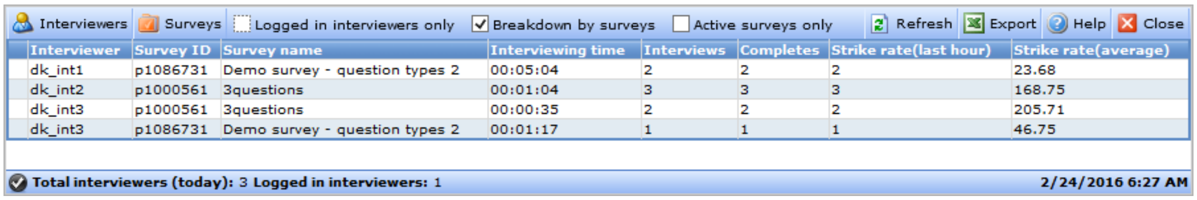


Figure 276 Viewing the Performance list for all interviewers who have worked today

3. You can choose which interviewers should be included in this list. Press the Interviewers button Interviewers to display the Select Interviewers window.

   This dialog window assumes the same user technique as used to make a choice in the Select Surveys dialog window (see Selecting surveys to display in the grid in the Survey List activity view on page 291. Press 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.



Interviewer	Survey ID	Survey name	Interviewing time	Interviews	Completes	Strike rate(last hour)	Strike rate(average)
dk_int1	p1086731	Demo survey - question types 2	00:05:04	2	2	2	23.68
dk_int2	p1000561	3questions	00:01:04	3	3	3	168.75
dk_int3	p1000561	3questions	00:00:35	2	2	2	205.71
dk_int3	p1086731	Demo survey - question types 2	00:01:17	1	1	1	46.75

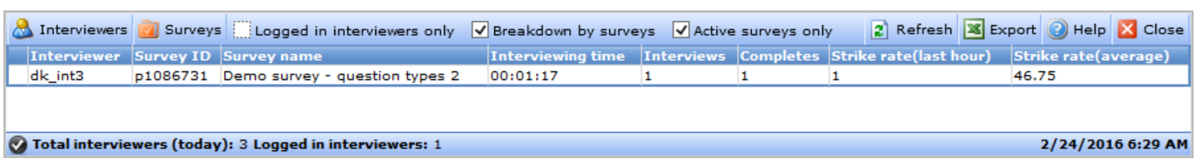
Figure 277 Interviewer performance list broken down by surveys

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 press the Surveys button. This will display the Select Surveys dialog window (see Selecting surveys to display in the grid in the Survey List activity view on page 291). There is an extra "Add open surveys" button in this dialog window which lets adding all opened surveys at once. Press it to instantly 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.



Interviewer	Survey ID	Survey name	Interviewing time	Interviews	Completes	Strike rate(last hour)	Strike rate(average)
dk_int3	p1086731	Demo survey - question types 2	00:01:17	1	1	1	46.75

Figure 278 Interviewer performance list broken down by active surveys

7. You can refresh the view manually at any time by pressing the Refresh button Refresh 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.

   Press the Export button Export above the grid and choose the path to save the file, or open the exported Performance List in MS Excel application instantly.

   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 Setting the selected Active Timezone as local on page 364 for explanation).

7.2.4 Setting up interviewer alerts

Supervisor can set up alerts that visually indicate if some parameter pertaining to an interviewer reaches or exceeds the critical value.

The leftmost grid column contains the alert indicator which shows whether some interviewer parameter has reached or exceeded the critical value.

Parameter thresholds are specified with the help of the Alert form.

Normally, when the parameter value does not near, or 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 with the exclamatory sign, 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. Press 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 279 Setting up interviewer alerts. Amber 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. Press 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 - - 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.

To export the list of currently active interviewers:

1. Display the Interviewer List window (see Monitoring interviewers and their work on page 297 for details).
2. Set the required survey filter (see Selecting surveys to display in the grid in the Interviewer List window on page 299 for instructions).
2. When the Interviewer List window shows information for the required interviewers press 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.

   Press the Save button in this dialog box. This will display the standard Windows Save As dialog box. Enter the file name and path to save the file, and press the Save button. The list of monitored interviewers is then saved to a file in MS Excel format.

   If you press 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

Note: Please 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 press 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. Press OK in each dialog box to confirm changes and close these dialog boxes.

Note that the download and installation procedures described herein are performed on the same machine – you should always install CATI Monitoring Console on the same machine you have used to download the installation files.

The URL from which you should download the CATI Monitoring Console installation files will differ depending on which server you run Confirmit Authoring from.

IMPORTANTThis 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 Monitoring Console Installation Files:

1. In Confirmit Authoring, go to the **CATI > Download CATI Monitoring Console** menu command.

   The Download CATI Monitoring Console dialog opens. Here you can either send the URL to a specified email address or copy it directly into your clipboard.

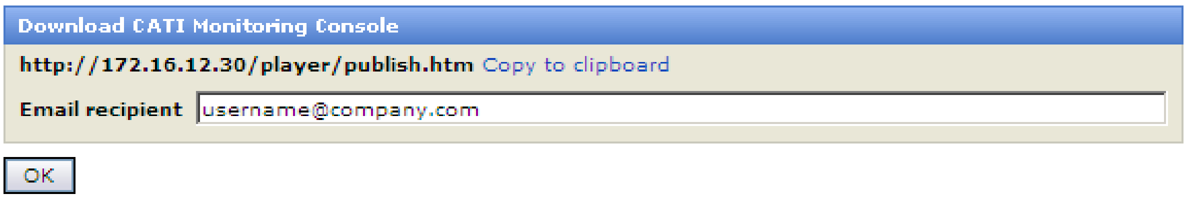


Figure 280 Fetching CATI Monitoring Console download URL

   The default email address to which the download URL will be sent is that specified for the currently-logged-on user - for you.

2. Edit the email address if necessary and click **OK**, or copy the URL into your clipboard and then paste it into Internet Explorer address bar.

   If using email, an email with the URL is sent to the specified address.

3. Click the URL to open IE at the appropriate download page.

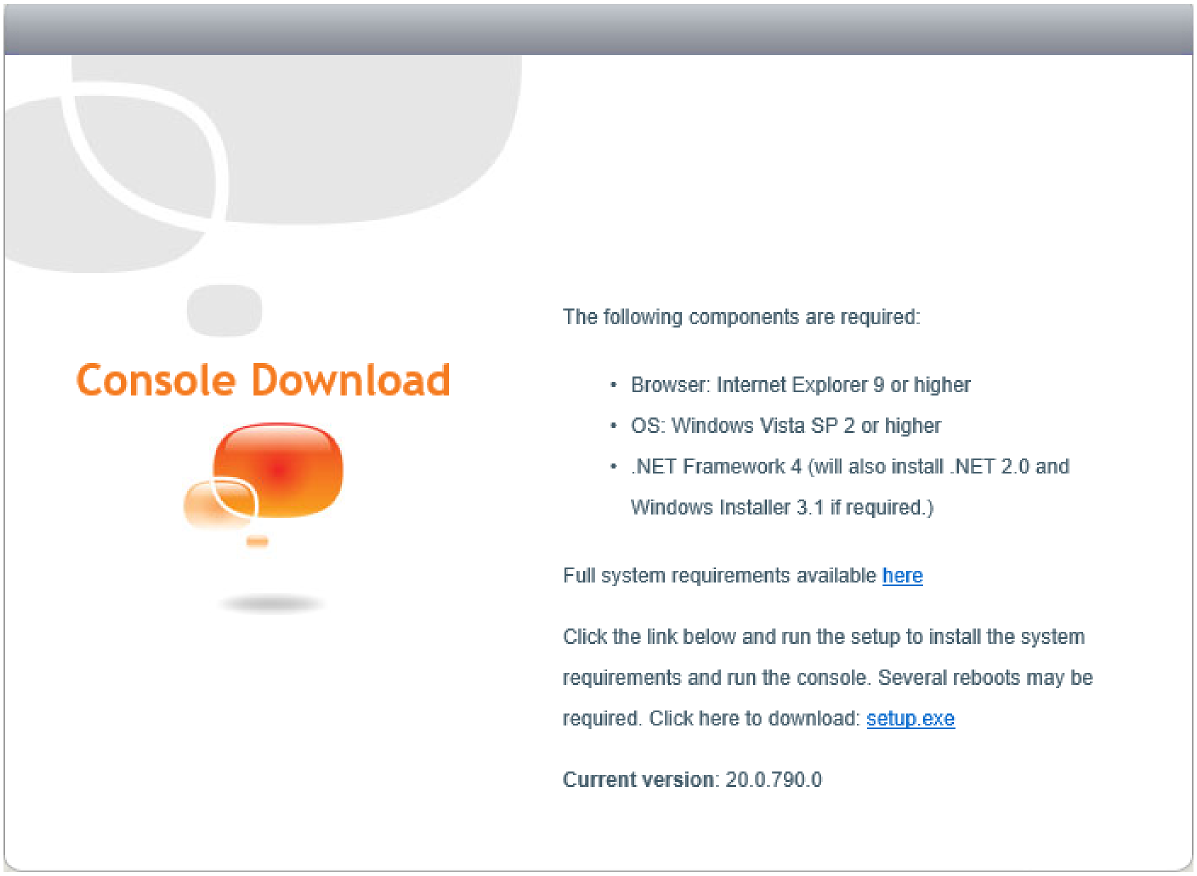


Figure 281 CATI Monitoring Console download page

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 Monitoring Console installation please refer to Installing a new copy of CATI Monitoring Console below.

   CATI Monitoring Console upgrade procedure is described in Upgrading CATI Monitoring Console on the next page.

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 on page 304 for details).
2. The dialog window with the progress bar showing the installation progress is displayed.

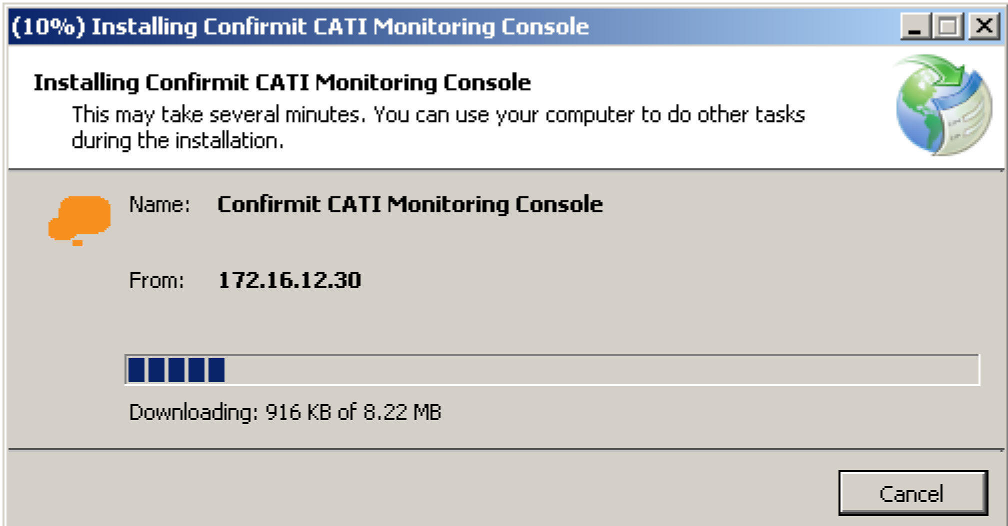


Figure 282 CATI Monitoring Console download progress

The CATI Monitoring Console is installed into the default destination. You cannot change the installation path.

3. The CATI Monitoring Console installation procedure does not create an icon neither in the Windows Programs menu, nor anywhere on the Desktop, in the System Tray etc. The CATI Monitoring Console utility is run automatically when required.
4. Whenever required you can check if the CATI Monitoring Console is installed by simply browsing the Uninstall or Change Program list which you can display by choosing 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 application

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 the real time

The CATI Supervisor module allows for live monitoring of the interviewing process.

To monitor interviewer's work in the real time the supervisor should install and launch the CATI Monitoring Console application. Refer to Downloading the CATI Monitoring Console Installation Files on page 304 for description of the CATI Monitoring Console application download and installation procedures.

Note: Please 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 press 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. Press 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.

Supervisor can monitor all actions that interviewers perform working in the CATI Interviewer Console application. He is able to see what particular interview is being conducted by the interviewer, currently answered interview questions, the answer variants 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.

The monitoring console grid is refreshed in very short time increments – 15 seconds. Values in the Interviewer List grid cells change each 15 seconds.

Supervisor can set up alerts for any parameter that is displayed in the grid in the Interviewer List dialog window.

Supervisor is not able to modify the answer variant, he/she can only terminate current interview if this is required. Interview can only be terminated when the monitoring is started for the required interviewer.

Please note that the supervisor is also able to perform the deferred monitoring of the interviewers' work. This means that he/she can enable the corresponding option and all interviews will be recorded and saved both as video and audio tracks. Recorded interviews will then be available for viewing and listening on demand for the fixed period of time. Please refer to Deferred monitoring in CATI Supervisor on page 315 for instructions on how to perform the deferred monitoring.

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. In the Interviewer List dialog window press the Start monitoring console button in the grid corresponding to the interviewer you want to monitor.

   Monitoring is started and the Start monitoring console button turns to the Stop monitoring button .

   Next the Telephony Number dialog window is displayed. Live monitoring also assumes 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, and also in case the supervisor supplies the telephone number which will be used to listen to the sound in the interviewer's telephone line.

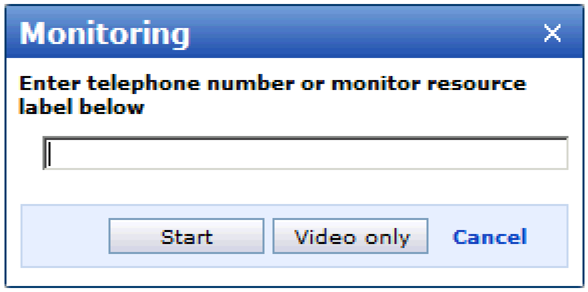


Figure 283 Choosing the monitoring option - with or without listening

To listen to the sound in the interviewer's telephone line specify your telephone number in the Telephone number field and press the Start button in the Telephony Number dialog window.

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.

If you are not going to listen to the conversation, leave the Telephone Number field blank and press the Only video button.

Pressing Cancel will close this dialog window and cancel live monitoring.

2. Pressing the Start or Only video button opens the Monitoring Console dialog window.

This window displays the same picture as on the interviewer's screen (it shows the contents of the CATI Interviewer Console application window), except that it does not contain any control elements - e.g. buttons, fields etc.

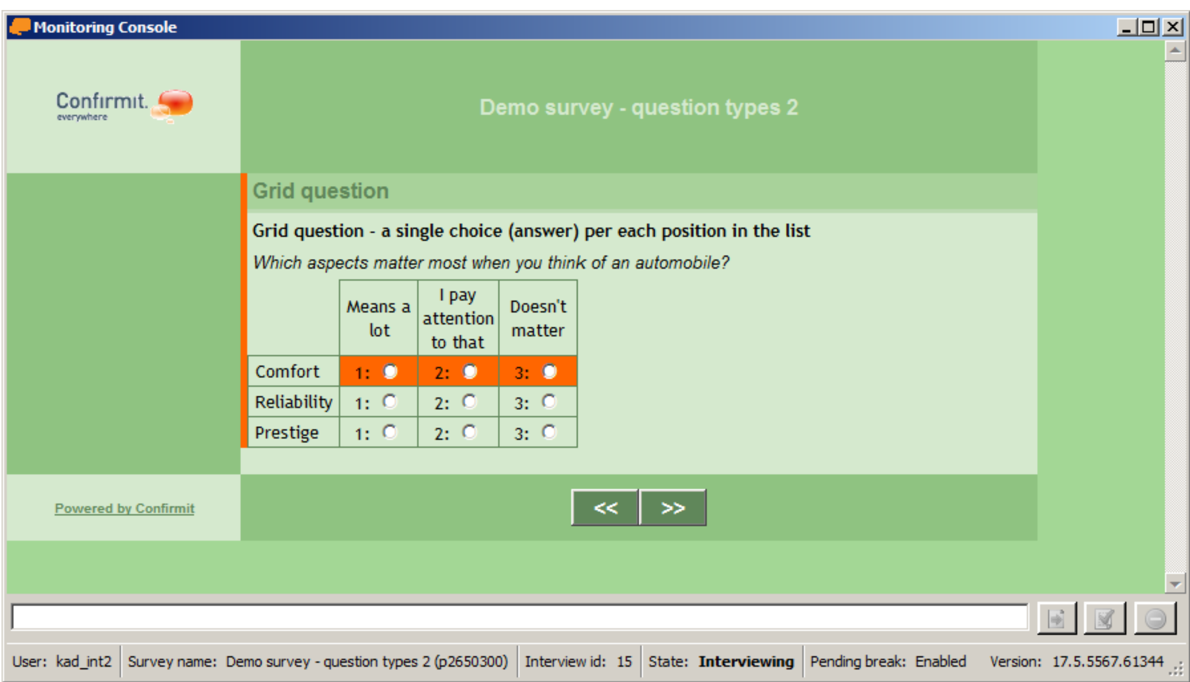


Figure 284 The Monitoring Console window displaying the monitored interview

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 name, 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 supervisor cannot perform any action in this window. He/she can only watch how the interview proceeds.

3. In case an audio file is being played back in the course of an interview the status bar in the Monitoring Console window will show the current status of the playback function: "Playback of voice fragment <filename> is started" - when the audio file is started, "Voice fragment playback paused (or resumed) -when the playback is paused/resumed, "Voice fragment playback stopped" - when the playback is stopped, "Voice source toggled" - when the interviewer switches between voice sources (see Sound playback audible to a respondent on page 280 for details).

4. Press the Stop monitoring button In the Interviewer List dialog window when you do not need to monitor the interviewer any more.

   Monitoring stops, the CATI Monitoring Console window closes, and the button turns back to the Start monitoring console button .

To terminate the interview:

1. In the Interviewer List dialog window press the Terminate button in the row corresponding to the interviewer whose interview you want to terminate. You do not have to run the Monitoring Console to terminate the interview.

   The interviewer will then see the following warning message.

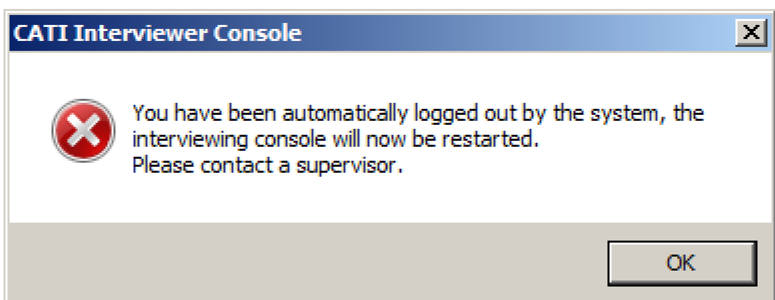


Figure 285 Warning message displayed to the interviewer after the interview has been terminated by the supervisor

   When the interviewer presses OK, the CATI Interviewer Console application window closes, and then reopens in the login mode, prompting the interviewer to log in again.

   Please refer to Interview terminated by the supervisor on page 286 for more details on this procedure.

2. When the current interview conducted by the selected interviewer is terminated, and live monitoring was in progress at the moment, the CATI Monitoring Console window goes blank, but the monitoring still continues.

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 work with the CATI Interviewer Console will be able to receive and access these messages almost instantly, 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 case the interviewer is not logged into the Interviewers Console, or in case 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 currently work with CATI Console.

Messages that are sent to interviewers assigned to a certain survey are delivered only when they are logged into the Interviewers Console and currently conduct 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 period:

- 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 starting from the creation date. After a week ends they are deleted from the system.

Please refer to Viewing messages on page 247 for procedures related to viewing messages from the CATI Interviewer Console.

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 (see Interviewer management on page 15 for details).
2. If you choose to view interviewer groups, you will be able to send messages to 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, that are currently listed in the top right frame.

   Now 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. This will display the

   Send Message dialog window.

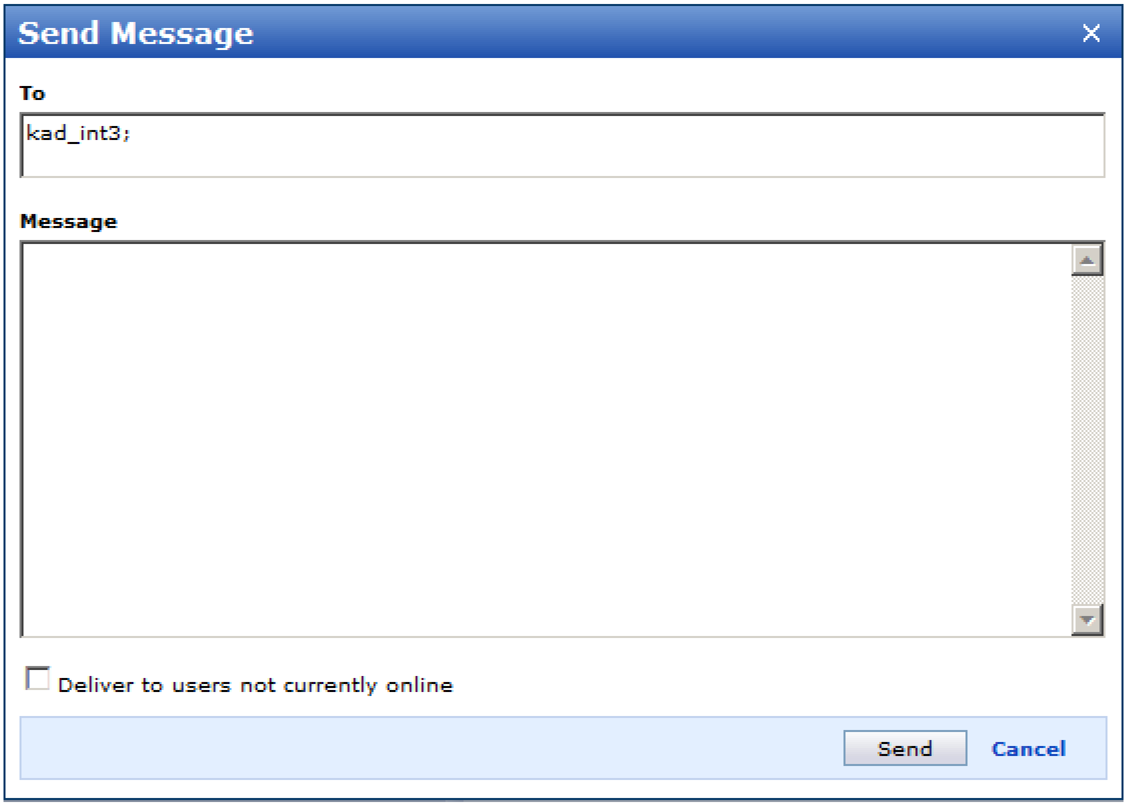


Figure 286 Sending message to interviewers

4. Selected recipient names will all be displayed in the To field separated by semicolons. This field is not editable - to add, or remove items from this field you should first close the Send Message dialog window, and then repeat steps 1 through 3 again, this time selecting only items you need.
5. The checkbox Deliver to users not currently online allows sending this message also to the interviewers who are not currently logged in. They will be informed about the message when they log in to work with the CATI Interviewer console the next time. Check this box to enable the option.
6. Type in the message text in the Message field.
7. Press the Send button 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. Next 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. This will display the Send Message dialog window.

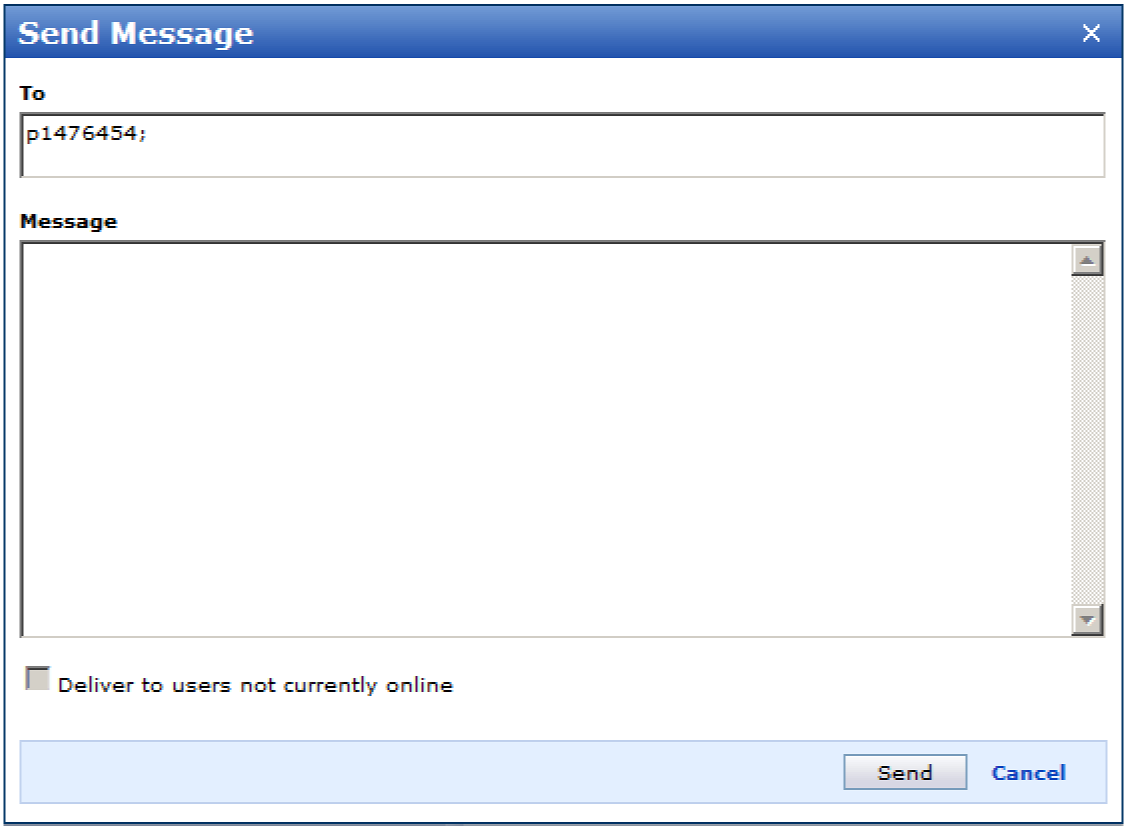


Figure 287 Sending message to interviewers assigned to the selected survey

4. Selected survey names will all be displayed in the To field separated by semicolons.
5. See Send Message dialog window. on page 311 for this dialog window description. The procedure used to send a message is similar to the one described there. The only difference is that the option for delivering messages to users who are currently not online is not available in that case.

To send a message from the Interviewer List dialog window (Activity View):

1. Select the Activity Views object in the Navigation frame.
2. Then select the Interviewer List view. This will display the Interviewer List dialog window (see Monitoring interviewers and their work on page 297).
3. Click on the Send Message icon  in the row corresponding to the interviewer you want to send a message to. This will display the Send Message dialog window.
4. See Send Message dialog window. on page 311 for this dialog window description. The procedure used to send a message is similar to the one described there.

To send a message from the Survey List dialog window (Activity View):

1. Select the Activity Views object in the Navigation frame.
2. Then select the Survey List view. This will display the Survey List dialog window (see Monitoring surveys and survey related events on page 290).
3. Click on the Send Message icon in the row corresponding to the particular survey (the message in such case will be sent to all interviewers assigned to this survey). This will display the Send Message dialog window.
4. See Send Message dialog window. on page 311 for this dialog window description. The procedure used to send a message is similar to the one described there. The only difference is that the option for delivering messages to users who are currently not online is not available in that case.

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. Please mind 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 288 A dialog displayed when the supervisor tries to terminate the interview (force the logout)

The supervisor can specify the reason for which he/she 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.

Press Log out to force the interviewer logout. Press 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 press the Terminate icon in the grid for the corresponding interviewer (see Monitoring interviewers and their work on page 297 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.

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 (see Monitoring interviewer's work in the real time on page 307 for details on performing the live monitoring), 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 shortly after it is finished.

Please 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 Recording and playing back conversations held in the course of the interview on page 169 for details).

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).

The deferred monitoring function in CATI Supervisor module 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. Please refer to Confirmit Authoring manual for a complete description of this procedure.

Before you start using the Deferred Monitoring function you should check for the following. The *Enable whole interview screen recording* option should 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 would not be recorded in video format, and would not be available for deferred monitoring later. If you want conversations held in the course of the interviewing to be recorded alongside the video, you should 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 would be saved and played back later in sync with the video file. Also make sure that the Dialer is in the "*available and operational*" state. If the Dialer is not in the "*available and operational*" state, and the *Enable whole interview audio recording* option is not enabled, telephone conversations held in the course of the interviews would 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 Viewing and modifying general properties of a survey on page 63). The status of both options is displayed on this tab.

Please refer to Connecting, configuring and disconnecting the Dialer on page 345 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 yet) before you initiate playback of the recorded interview that contains an audio track.

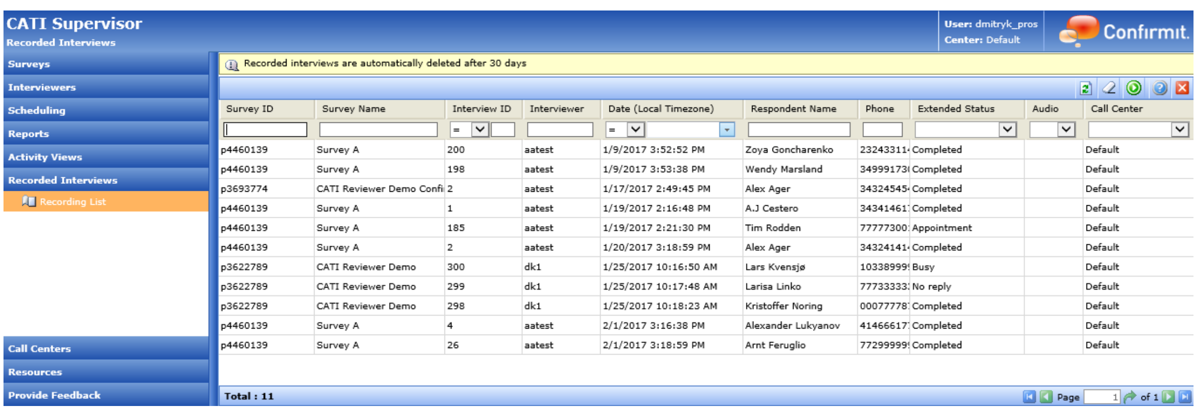
After the **Enable whole interview screen recording** option (in Confirmit Authoring) is enabled, all interviews would be recorded and added to the Recorded Interviews list automatically. The same is true for the ***Enable whole interview audio recording***option - when it is enabled all telephone conversations held in the course of all interviews are recorded automatically.

Video files with recorded interviews are stored on the server for 30 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 Recording and playing back conversations held in the course of the interview on page 169 for details).

To play a recorded interview:

1. Note that CATI Monitoring Console should be installed on your computer - this utility is required to perform all kinds of interview monitoring. Please refer to Downloading the CATI Monitoring Console Installation Files on page 304 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.
2. In the Navigation Menu in the left frame choose the Recorded Interviews object.



The right frame will display the list of all the recorded interviews. This list includes interviews performed by the interviewers belonging to the same company that the Supervisor himself belongs.

3. 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

4. In case you have applied a filtering criteria using the searchable column header (see Searching for objects in the list on page 11), you can instantly remove this filter (and reveal all existing records) by pressing the Reset button  in the frame toolbar.
5. 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 press the Play button  in the toolbar above the list.

Mind that the dialer should be started 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 the message explaining the reason why you cannot access the audio track of the interview recording.

6. The Play command will initiate download of the 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.
7. After the interview recording is opened, the CATI Supervisor Player starts.

   The CATI Supervisor Player

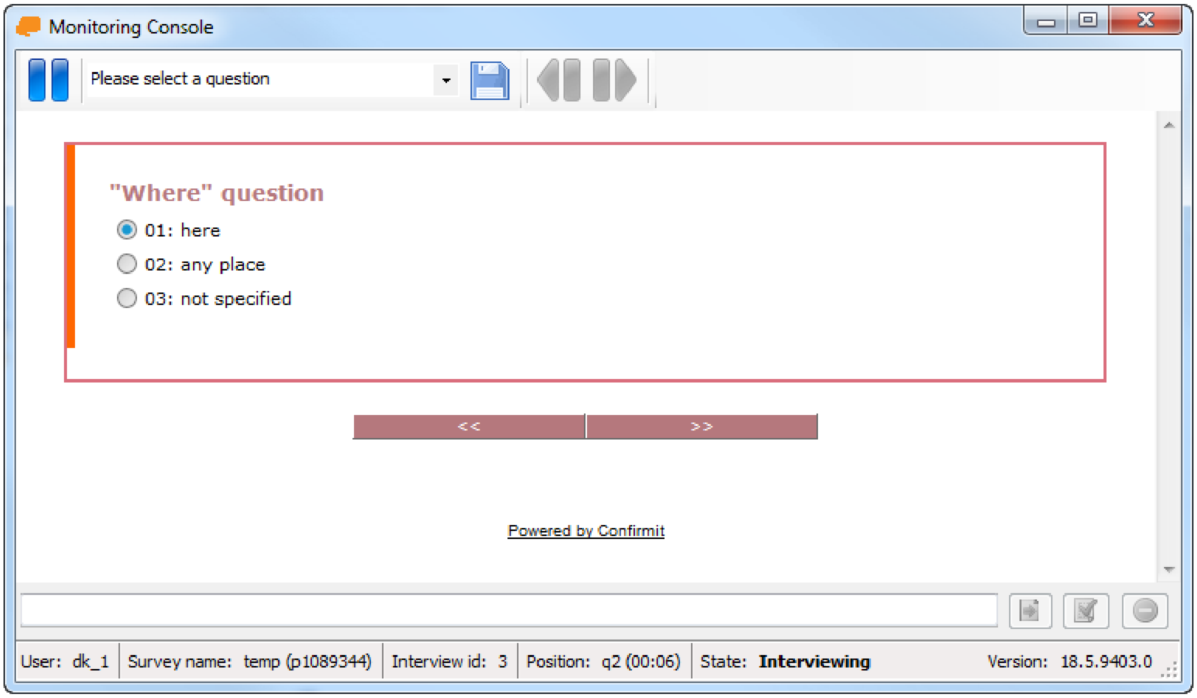
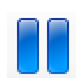


Figure 289 Recorded interview displayed in the CATI Supervisor Player

Recorded interview is displayed in the CATI Supervisor Player window starting from the very first interview 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 to complete them.

Pay attention to the information displayed in the status bar. In addition to the regular information set (see The CATI Console interface on page 243 and Monitoring interviewer's work in the real time on page 307) 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.

To stop playback press 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.

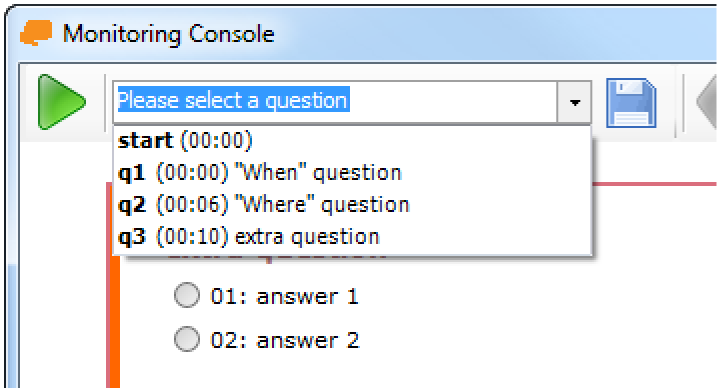
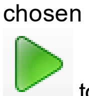


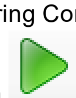
Figure 290 Choosing an interview question to jump to

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 and what to jump to that question you can start typing the question name 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 press the Resume button  to start it.

If there is an audio track present it is played 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 jumping about 2 seconds back or forward in the audio track. To jump back and forward in the audio track you should press 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 takes you about 2 seconds correspondingly back or forward in the audio track.

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 press 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 press 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.

4. After the interview playback finishes, you can play another recorded interview, or repeat the playback of this interview following steps 4 through 6 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 Monitoring in the CATI Supervisor on page 289). 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 (see Setting up time intervals for monitoring appointments on page 323)
- Count of appointments which fall into the long period specified for monitoring appointments (see Setting up time intervals for monitoring appointments on page 323)

You can choose to display he last two columns show count of appointments which fall into the corresponding time range.

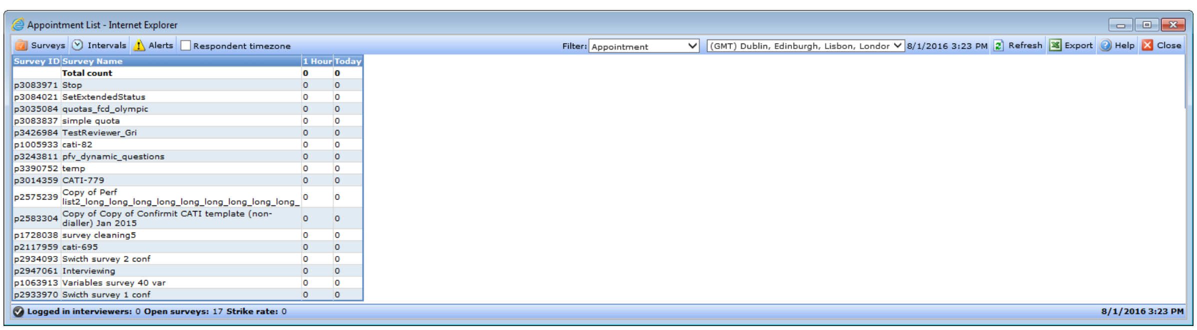


Figure 291 Activity Views - Appointment List dialog window

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).

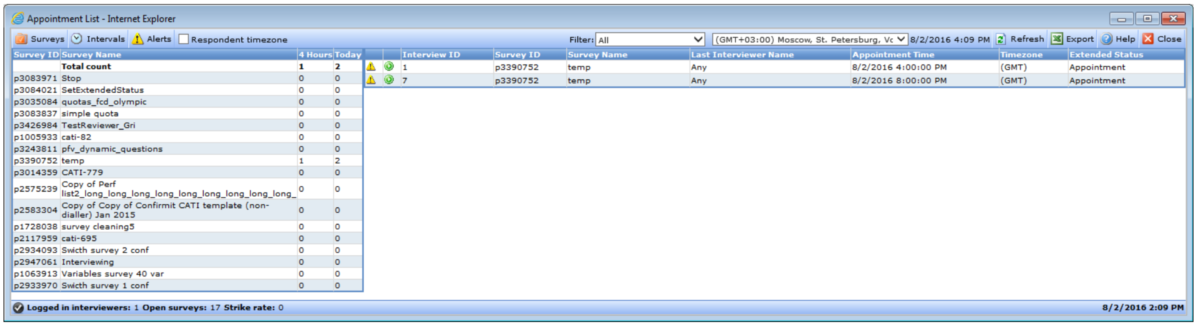
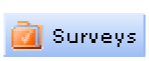
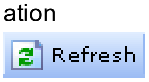


Figure 292 The Appointment List window displaying the list of alerts

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 (see Setting up alerts for monitoring appointments on page 323)
- Activate button - allows performing the Activate operation with the corresponding interview (see Setting up alerts for monitoring appointments on page 323)
- 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. Refer to Setting up alerts for monitoring appointments on page 323 for details.

The Appointment List dialog window also contains a toolbar with the following buttons and indicators.

Button	Description	Function
	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.
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. Refer to Setting up alerts for monitoring appointments on page 323 for more information.
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.
	REFRESH	Allows updating the appointment list manually.

	EXPORT	Exports current appointment list in MS Excel format.
	CLOSE WINDOW	Closes the Appointment List dialog window.

The Appointment Alert list also contains an Activate button. It alows to activate a call directly from the list. Please refer to Activating the alerted interview on page 325 for instructions.

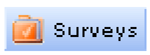
When a survey is closed its entry is removed from the Appointment List.

The Appointment List automatically refreshes every minute and it can be refreshed on demand by clicking on the "Refresh" button  on the toolbar.

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. Press the Surveys button  on the toolbar.

   This will display the Select Surveys dialog window.

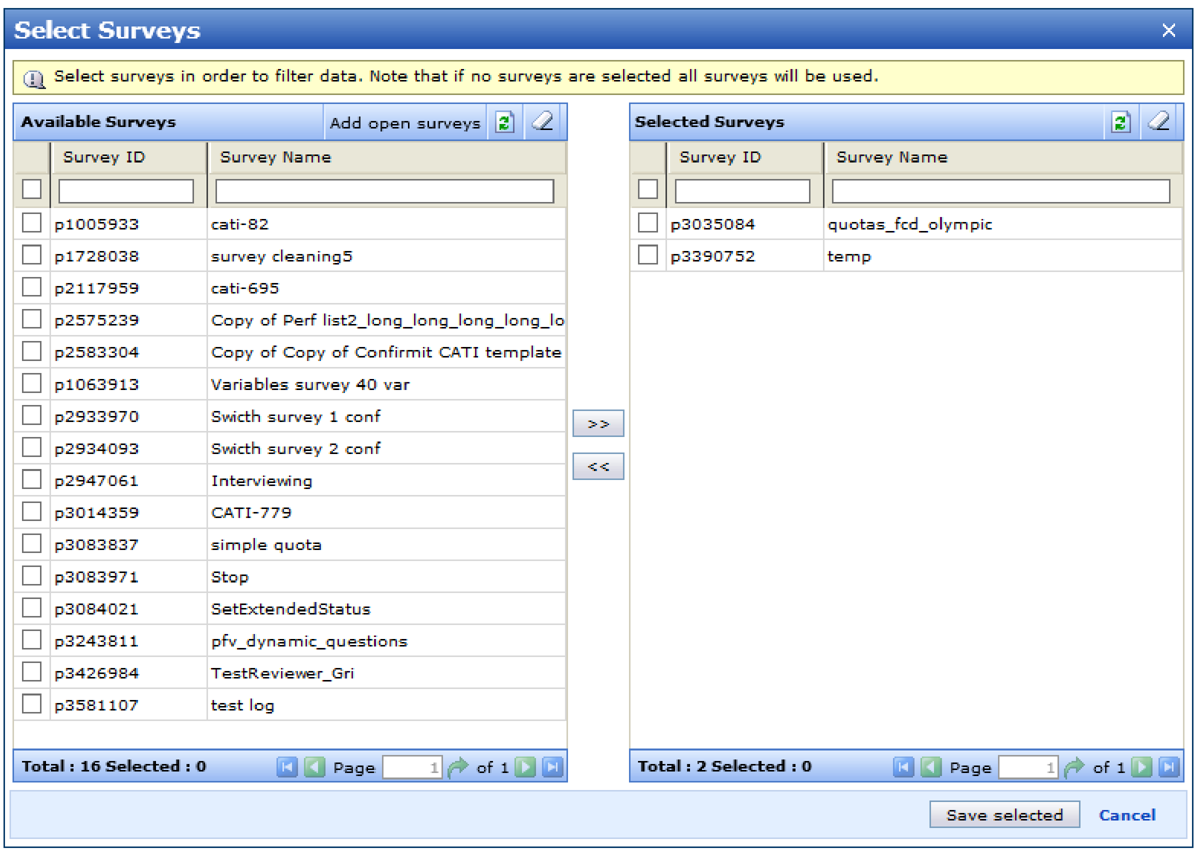


Figure 293 Selecting surveys to monitor for appointments

Press the Select button to display the Select Surveys dialog window (see description of this form here - Selecting surveys to display in the grid in the Survey List activity view on page 291).

2. Press 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 short and long time periods to be monitored are specified with the help of the special form – the Select intervals for appointment counters form.

This form is displayed when you press the Intervals buttons 

on the toolbar. It is displayed right below that button.

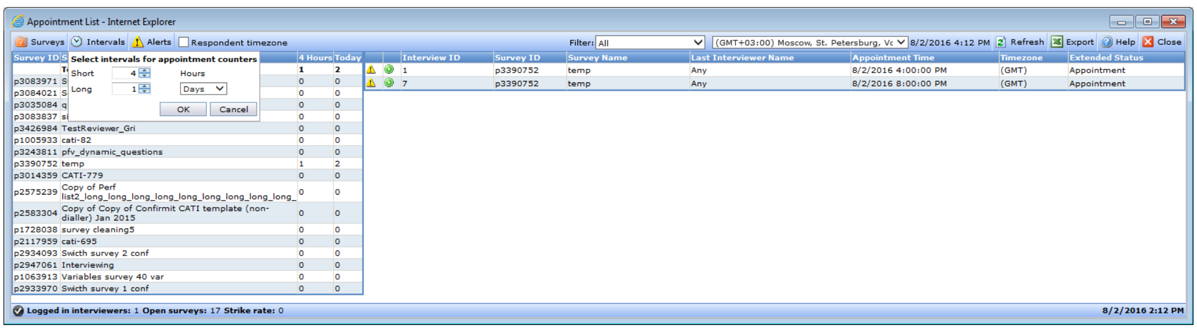


Figure 294 Setting up intervals for appointment counters

The short period 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 spinbox allows selecting the 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 all appointments for each survey that falls within specified periods.

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. Press the Alerts button 

on the Appointment List toolbar.

   This will display the Appointment Time form right below this button.

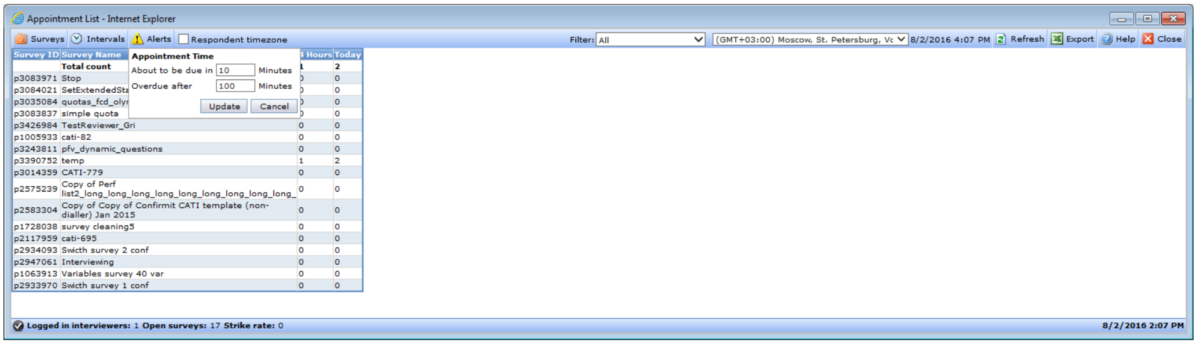


Figure 295 Setting up appointment alerts

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. Another alert parameter, which you set up using the "Overdue after a number of minutes" field, lets you see if there are overdue appointments. Enter the value in the "Overdue after a number of minutes" field. When the specified time elapses, the alert for the corresponding survey will indicate that there are appointments for this survey that are overdue after this number of minutes.
4. Press the Update button to activate alerts.
5. When the alert time is reached, the Appointment List dialog window displays an extra 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 (see Step 2). The list will also show overdue appointments. The appointment is removed from the list when it expires.

   The appointment is removed from the list also 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.

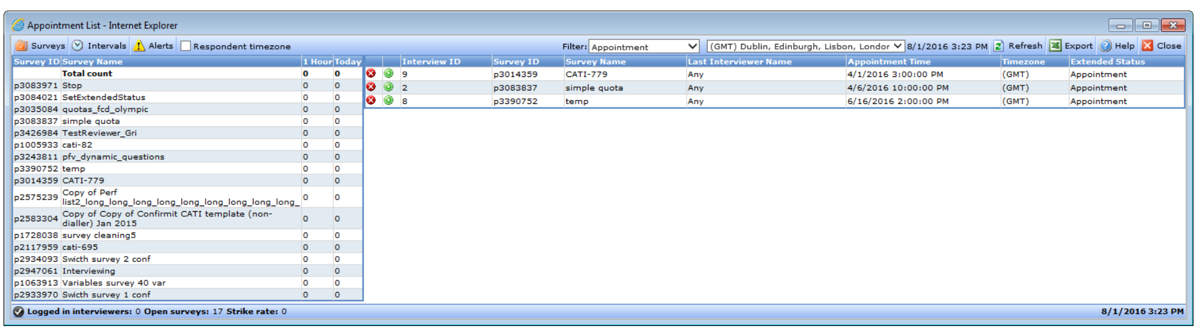


Figure 296 Monitoring the appointment alerts

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 triangle in case the appointment is due in the specified time and the red crossed circle in case the appointment is already overdue.

The second to 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 below 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 Exporting the appointment list on page 325 for procedure description.

Comments concerning this topic? Send an email

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 he/she has to press 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.

Please refer to Activating an interview/call on page 135 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.

To export the appointment list:

1. Display the Appointment List window (see Monitoring appointments on page 320 for details).
2. Set the required survey filter (see Selecting appointments to display in the grid in the Appointment List window on page 322 for instructions).
2. When the Appointment List window shows information for the required appointments press 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.

   Press the Save button in this dialog box. This will display the standard Windows Save As dialog box. Enter the file name and path to save the file, and press the Save button. The appointment list is then saved to a file in MS Excel format.

   If you press the Open button, the appointment list is opened in the application which is used by your system by default to view files in MS Excel format.

8 Working with the Resources objects

Objects of the Resources type are used to specify settings used with other CATI objects. The following objects of the Resources type are available:

- **Extended Status Codes** - the list of codes which are used to determine the current state of the interview/call;
- **Call groups** - lists selections of calls with certain extended statuses that can be assigned to the chosen interviewers (available only for users belonging to designated companies);
- **Dialer** - the set of settings which are used to configure the way the dialing system handles certain situations related to dialing routines;
- **Telephone Blacklist** - the list of numbers that should not be used by the dialer;
- **Master Timezone List** - the complete list of time zones;
- **Active Timezone List** - the list of time zones currently in use by CATI Supervisor module;
- **Settings** - (available only for users with corresponding permission enabled in Confirmit Authoring module - refer to Confirmit Authoring User Guide for details) the list of options which are used for locking of the interviewer account and configuring a set of reports that can be emailed on a daily basis;
- **Tasks** - the list of tasks that were performed by supervisors assigned to the current call center;
- **Database Update Logs** - (available for "administrator" supervisors only) the list of system database updates that were run;
- **Management** - (available for "administrator" supervisors only) the section providing possibility for the manual save of interviewer activity data;
- **About CATI Supervisor** - displays general information about the copyright and the software version.

These objects are important since they set the base for timings and determine how properties of other objects are specified.

Supervisor can add, modify, and delete objects of each type.

All operations with Resources objects are begun by navigating to the appropriate object list. The list of objects of each type is displayed in the top right frame.

To display the list of the Resources objects of the particular type:

1. Click the Resources button in the vertical Navigation menu (which is displayed in the left frame)
2. In the list that unfolds below:
   - Either double-click the required Resources object, or
   - Right-click the required object and choose List from the context menu that appears.

   This will display the list of objects of the selected type in the top right frame.

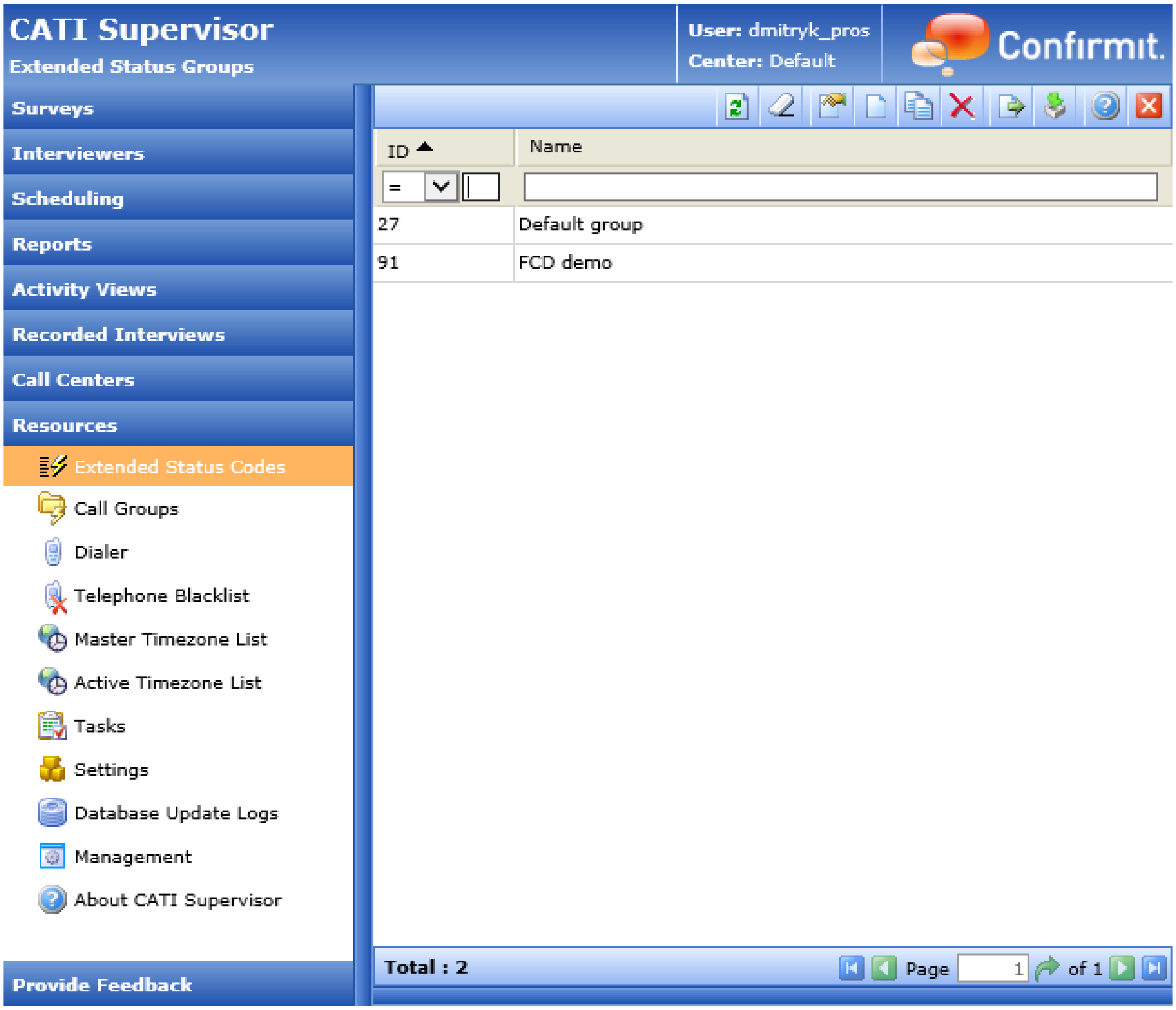


Figure 297 The Resources object type list (Extended Status Codes object list is displayed)

The picture you see above displays Resources objects which are available to a "normal" supervisor - the Settings, Database Update Logs and Management objects are hidden, they are displayed only when a supervisor who is granted necessary rights logs into the system.

3. The set of operations that the user can perform on objects depends on the currently selected (currently viewed) object type. Please refer to the corresponding topics for instructions - see the list below.

8.1 Configuring the Extended Status Codes

Extended Status Codes are used to indicate current status of an interview/call. Please see Modifying the interview/call properties on page 126 for information on how Extended Status Codes are used with interviews and calls.

Please refer to Appendix F - The list of the predefined Extended Statuses on page 430 for the complete list of Extended Status Codes and their descriptions.

The CATI Supervisor module allows separating Extended Status Codes into groups for conveniency.

Usually extended status codes are applied on a survey level as a set containing all the required statuses - some extended statuses may require the priority change to suit the survey, for some activation may be disallowed, and also you can rename the extended statuses which are not predefined. It is convenient to separate such modified set into a Group of Extended Status Codes. Supervisor can create a number of such groups.

A certain Extended Status Code Group must be selected as a survey property - see Viewing and modifying general properties of a survey on page 63.

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

Whatever operations with the Extended Status Code groups you need to perform you start with browsing the Extended Status Code group list.

To view the Extended Status Code group list:

1. Double-click the Extended Status Codes item in the list in the left Navigation frame, or right-click its name and choose List from the shortcut menu. This will display the list of Extended Status Code groups. The Extended Status Code group list is displayed in the top right frame of the CATI Supervisor main window.

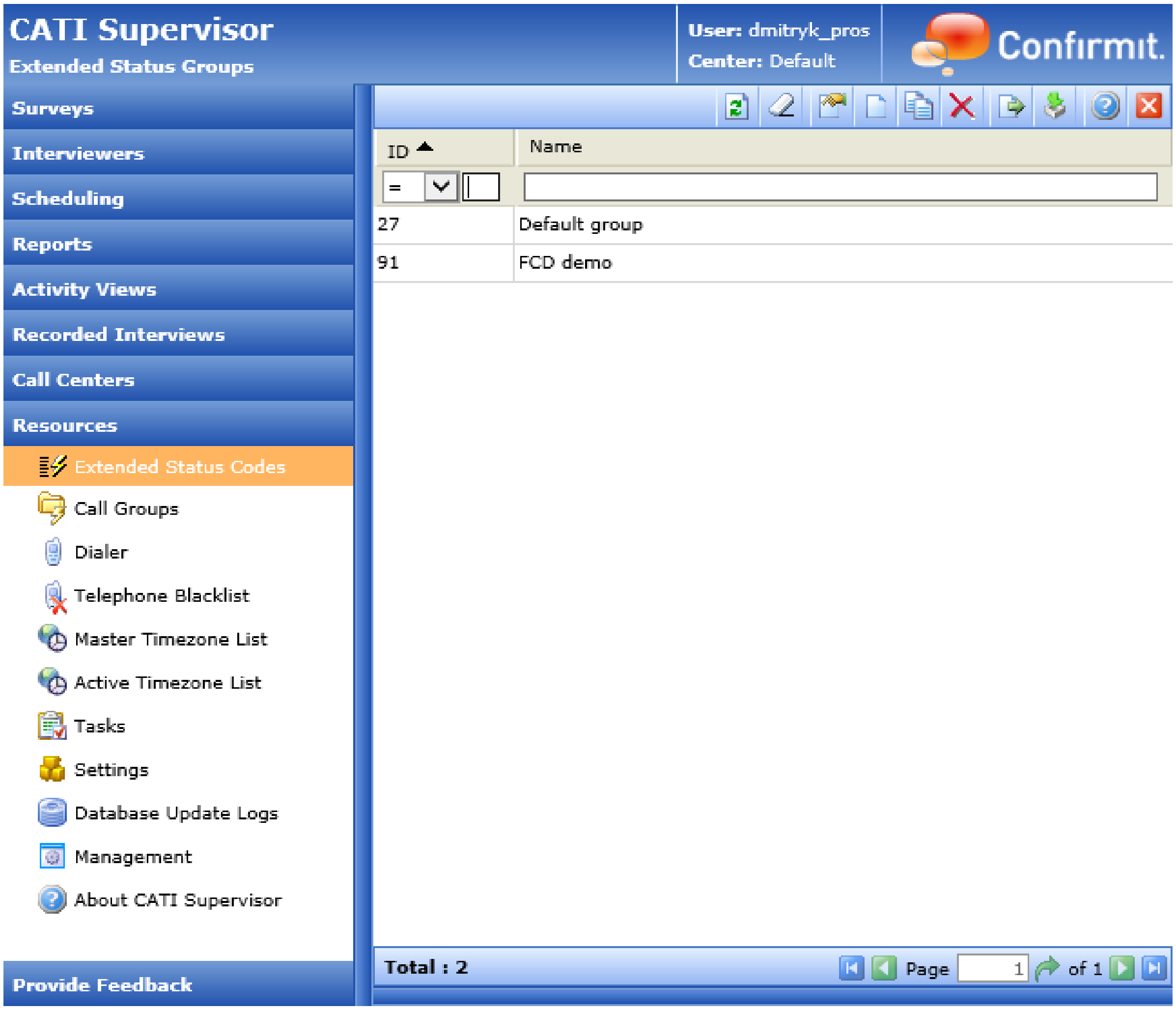


Figure 298 Viewing the Extended Status Code group list in the top right frame

2. The user can perform the following operations with the Extended Status Code groups:
   - View and modify the Extended Status Code group properties;
   - Export and import the Extended Status Code groups;
   - Add or delete Extended Status Code groups;
   - Refresh the Extended Status Code group list.

   These operations can be performed with the Extended Status Code group list 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 Extended Status Code group description), or by selecting a row in the grid and pressing buttons on the toolbar in the top right frame (the toolbar is located in the frame's title bar).

   To refresh the Extended Status Code group list press 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 right 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
	CLOSE WINDOW	Closes the CATI Supervisor dialog window

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 press the New button on the tool-bar, 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.

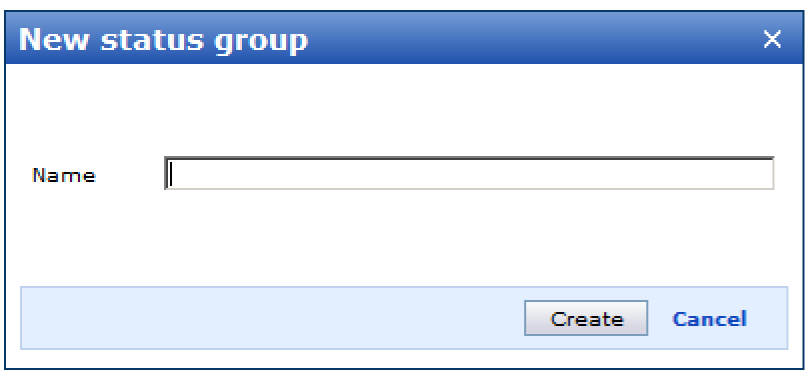


Figure 299 Adding a new extended status group to the list

2. Enter the name for the new group in the Name field and press 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 on the next page 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 press 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.

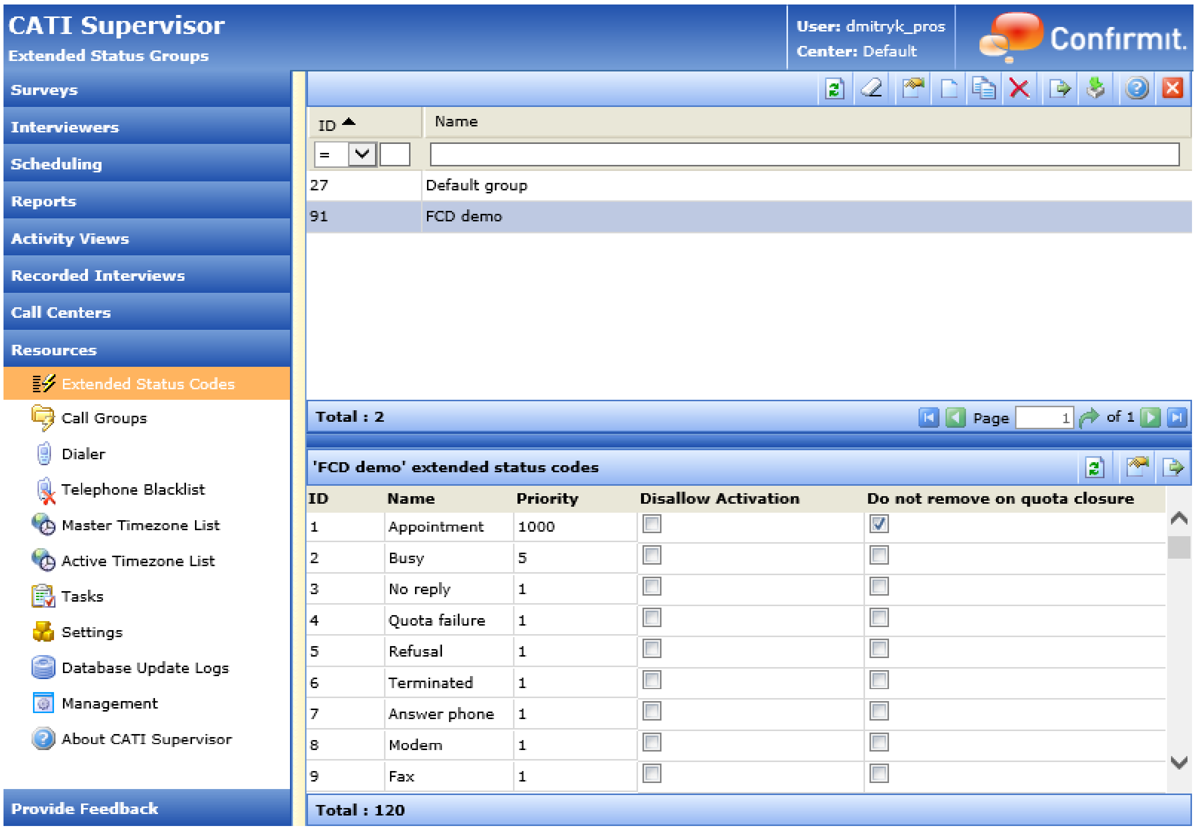


Figure 300 Viewing the extended status list

The list of extended statuses normally contains a set of 30 predefined statuses, which ID and name could not 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 on). Properties of the "custom" statuses can be edited with the exception of their ID value.

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. You can edit the extended status properties in the following way.

   Either double-click the selected status name in the list in the bottom right frame, or select the status name and press 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.

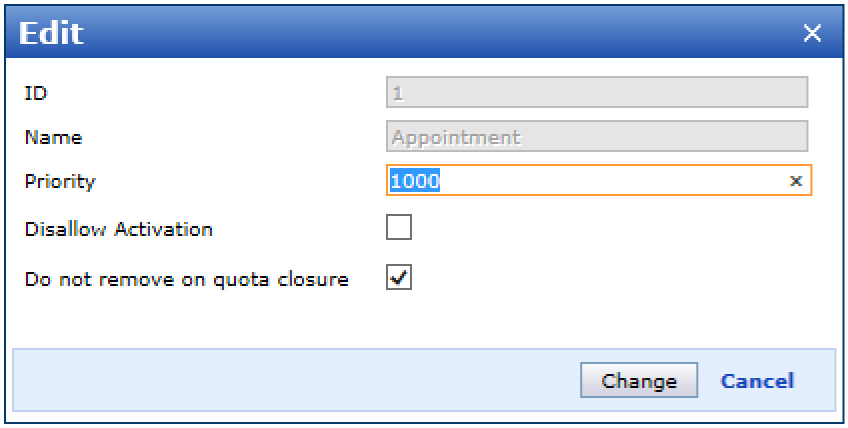


Figure 301 Modifying the extended status properties

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 action if it already exists in the survey scheduling rules.

2. For the first 30 statuses (ID ordinal number) you will be able to modify the Priority value and check (or clear) the Disallow Activation box. Other statuses also allow changing their names.

   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 on page 110 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). Please refer to Configuring settings related to the entire company on page 364 for more information on "Call filtering behaviour for filled quotas".

   Press Change in the Edit dialog window to confirm property changes.

3. Repeat the procedure to modify properties of other extended statuses.

8.1.4 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 press 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.

Comments concerning this topic? Send an email

8.1.5 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 press 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. Press 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 press 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 press 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 objects are used to create and manage groups of calls with certain extended statuses that can be assigned to the 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. Please refer to Viewing and modifying the interviewer properties on page 37 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. Please refer to Viewing and modifying general properties of a survey on page 63 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 situation occurs that some call which matches a Call Group has already been assigned a priority value individually

Important! If some priority value had been assigned beforehand to the particular call individually then it will take precedence over the priority value assigned to that 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 Viewing and modifying the interviewer properties on page 37 for instructions.

Important! For the interviewer to start working in the Call Group mode, he must be assigned to some call group, he must work in the Survey Selection task choice mode, and the Call Group mode must be enabled for the survey he works with.

8.2.1 Viewing the Call Group list

To perform operations with Call Groups you need you start with browsing the Call Group list.

To view the Call Group list:

1. Double-click the Call Groups item in the list in the left Navigation frame, or right-click its name and choose List from the shortcut menu. This will display the list of Call Groups. The Call Group list is displayed in the top right frame of the CATI Supervisor main window.

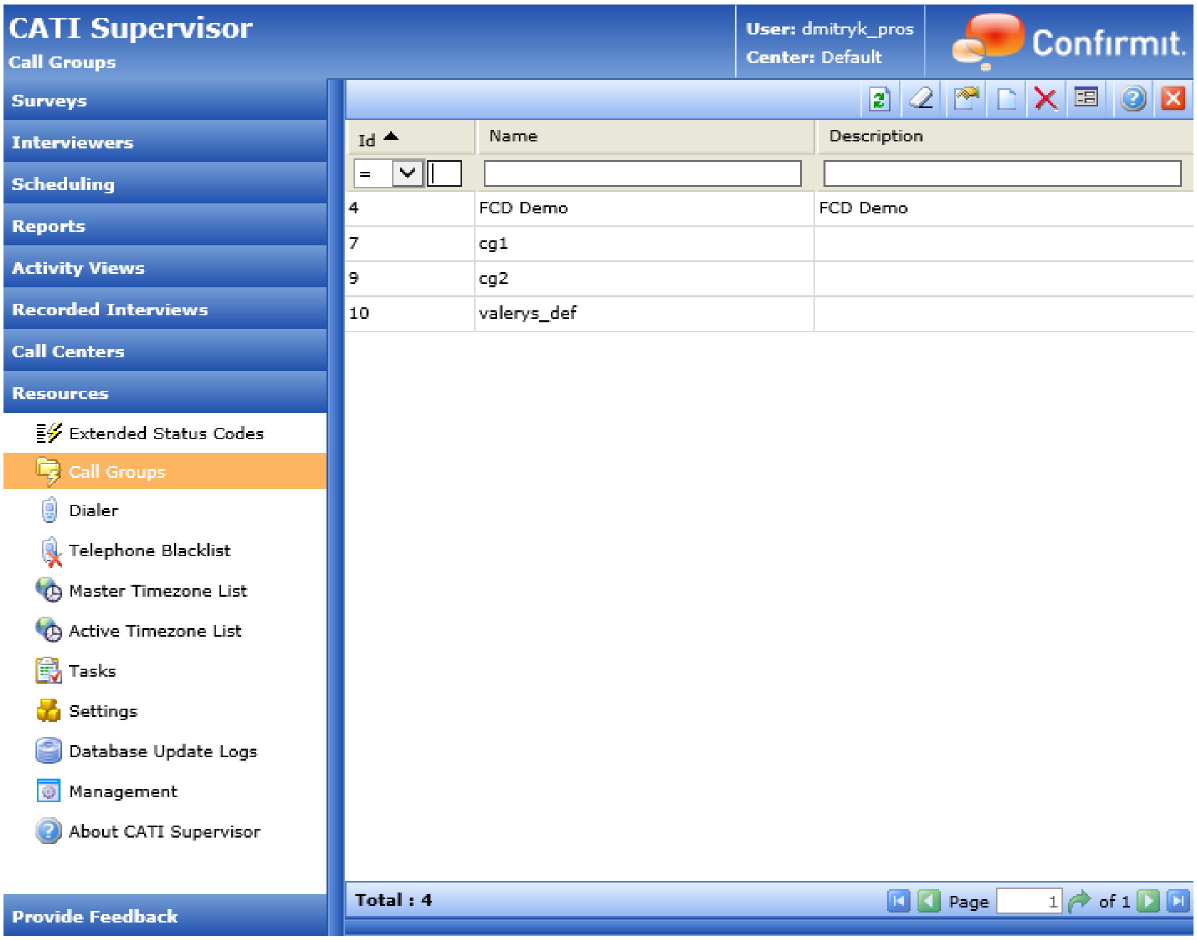


Figure 302 Viewing the Call Group list

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.

   These operations can be performed with the Call Group group list 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 Call Group description), or by selecting a row in the grid and pressing buttons on the toolbar in the top right frame (the toolbar is located in the frame's title bar).

   To refresh the Call Group list press the Refresh button  on the toolbar.

3. When the top right frame displays the list of Call Groups its toolbar contains the following object specific button set.

Button	Description	Function
	REFRESH	Updates the Call Group list

	NEW	Displays the Add Call Group dialog window and allows creating a new Call Group
	VIEW	Displays parameters of the selected Extended Status Code group in a dialog window.
	PROPERTIES	Displays the Call Group properties in the bottom right frame. You can edit these properties.
	DELETE	Deletes the selected Call Group
	CLOSE WINDOW	Closes the CATI Supervisor dialog window

.

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 right frame press 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.

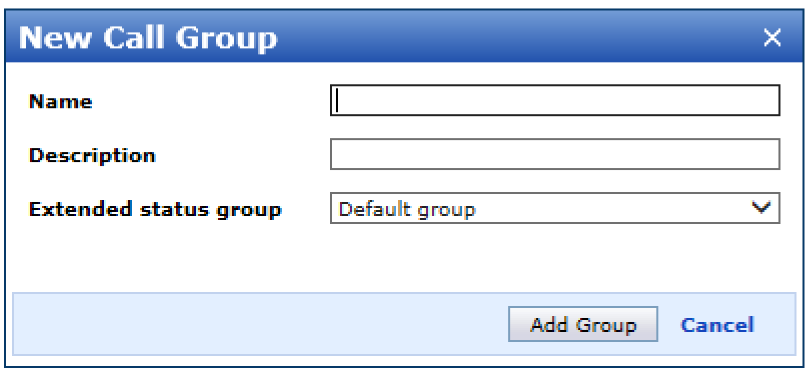


Figure 303 Adding a new call group to the list

2. Enter the name for the new group in the Name field and optionally a description of this group 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 Configuring the Extended Status Codes on page 327 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
3. Press 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 right frame press 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.

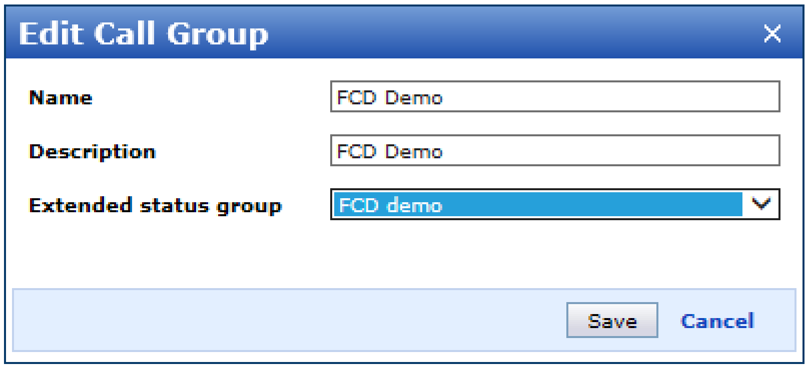


Figure 304 Modifying the call group properties

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 Configuring the Extended Status Codes on page 327 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. Press 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.

Please mind the delivery algorithm when you configure the call group parameters - refer to Configuring the Call Groups on page 333 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 some call group, he must work in the Survey Selection task choice mode, and the Call Group mode must be enabled for the survey he works with.

We would recommend referring to Modifying the interview/call properties on page 126 for information on how Extended Status Codes are used with interviews and calls.

You can also find the complete list of the predefined extended statuses in Appendix F - The list of the predefined Extended Statuses on page 430.

To view and modify the Call Group parameters:

1. Double-click the Call Group item in the list in the top right frame and press 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.

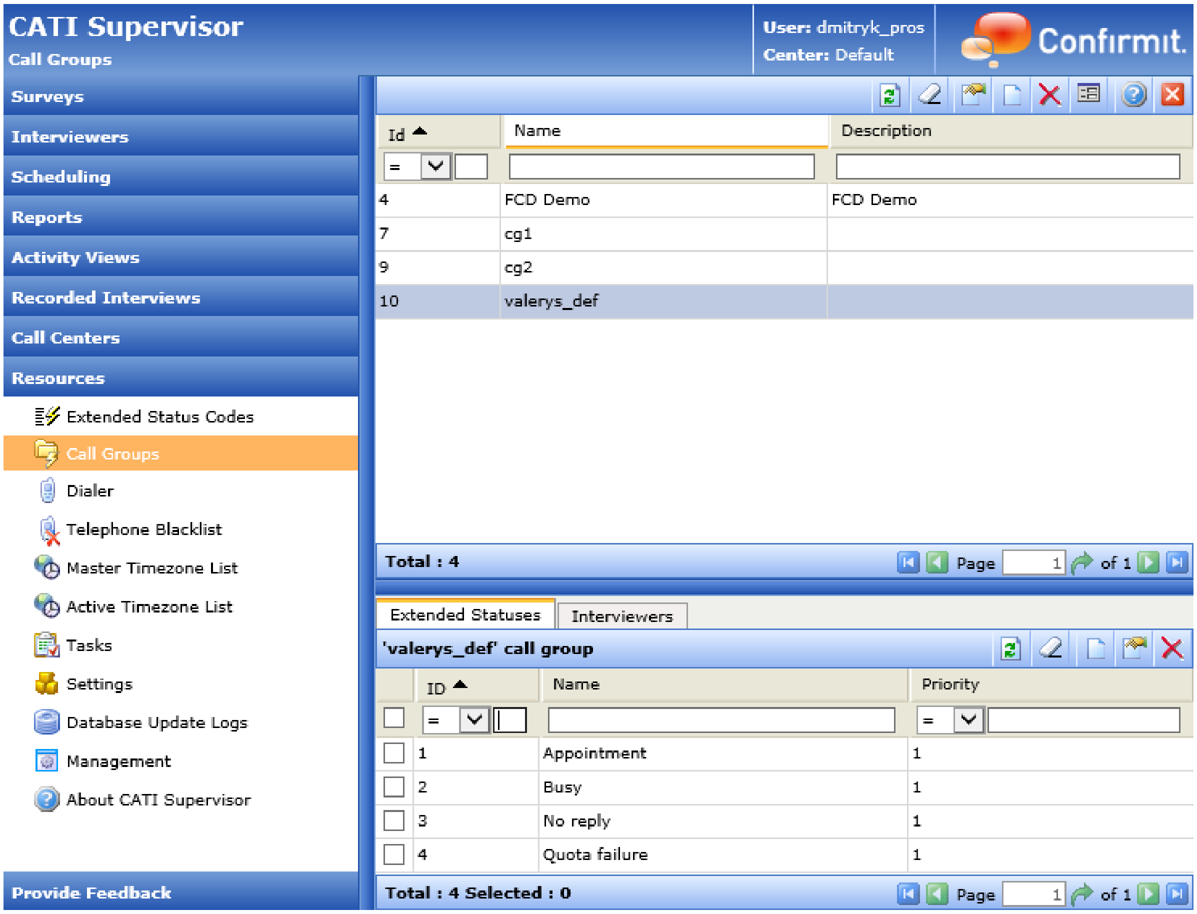


Figure 305 Viewing the Call Group parameters

To view and modify the Call Group parameters:

1. You can edit the Call Group parameters in the following way.

   When you need to add a new extended status to the call group, change to the Extended Statuses tab and press 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.

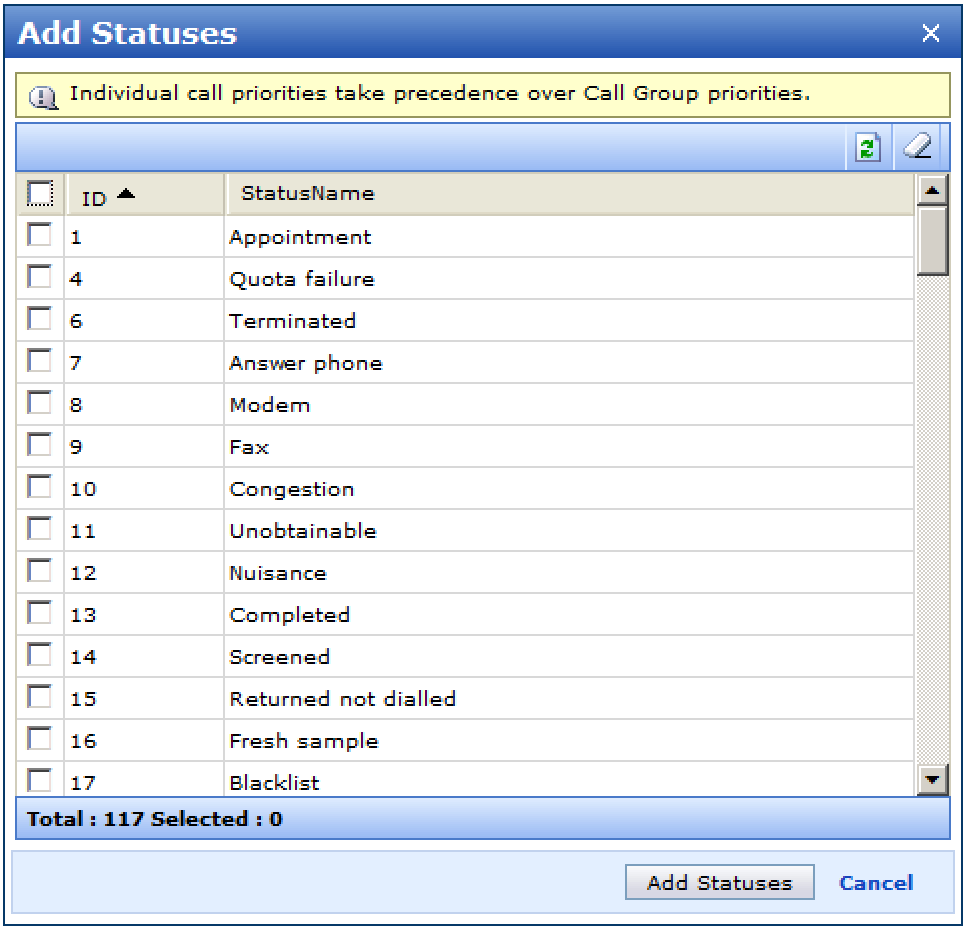


Figure 306 Adding extended statuses to the Call Group

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 press Add Statuses button below the list when you are done.

Selected extended statuses will appear on the Extended Statuses tab in the bottom right 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 press 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. Press 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 press 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.

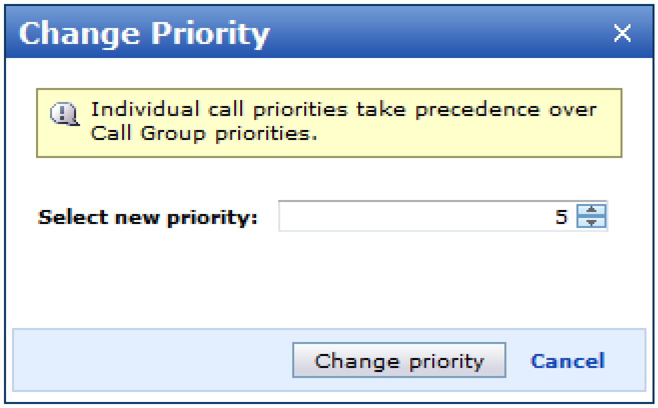


Figure 307 Changing the priority value of the selected extended status in the Call Group

Select the new priority value using the Priority spinbox. Press 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 some priority value had been assigned beforehand to the particular call individually then it will take precedence over the priority value assigned to that 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.

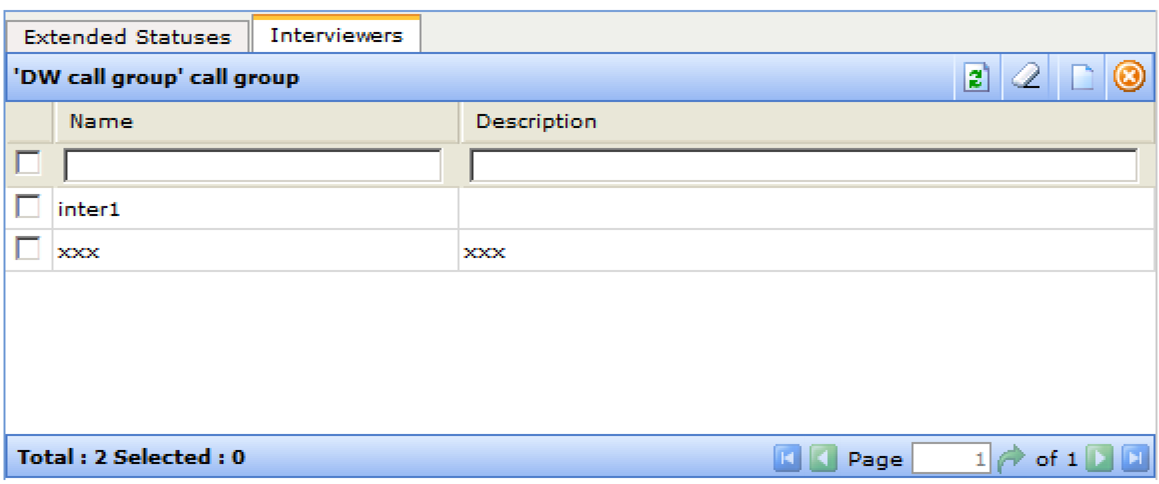


Figure 308 Managing interviewers assigned to call groups

To add an interviewer to the call group press the New button  on the toolbar. This will display the Add Assignment dialog window.

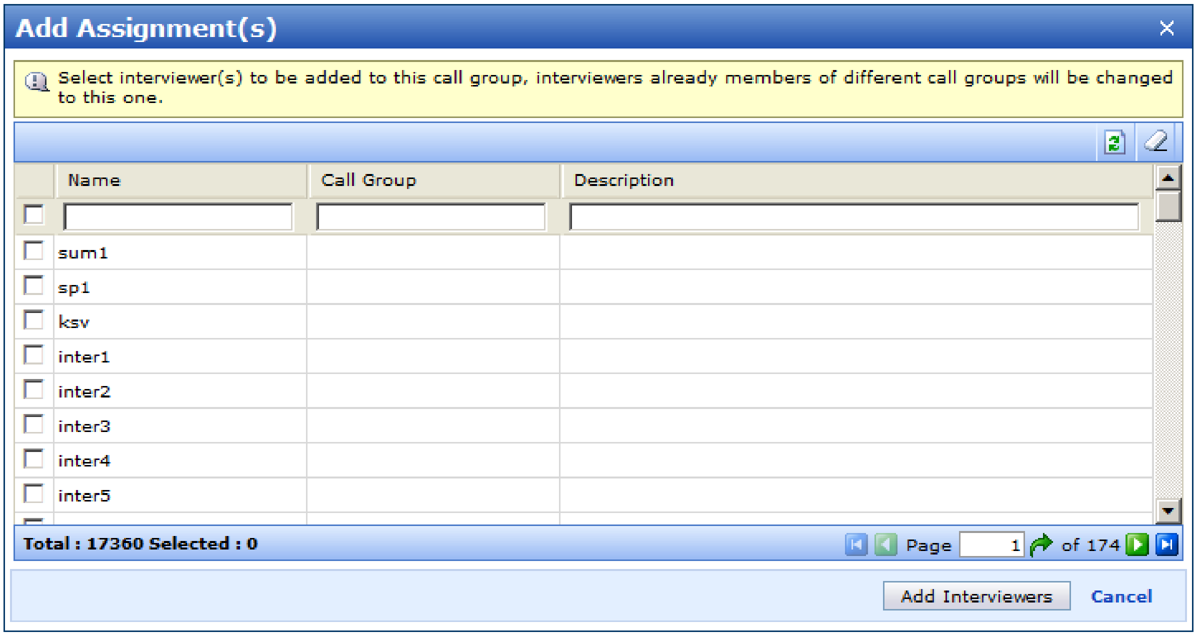


Figure 309 Assigning a new interviewer to the call group

Select one or a number of interviewers in the list and press 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 press the Deassign button on the frame toolbar.

CATI Supervisor will ask you to confirm assignment deletion. Press 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.

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 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. Please refer to the present chapter and to Connecting, configuring and disconnecting the Dialer on page 345 for descriptions of dialer peculiarities.

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. Refer to Working with a number of dialers on page 350 for instructions on working with a number of dialers simultaneously.

Important! In case a number of dialers are used with CATI Supervisor they must all be of one and the same type (either several TCI dialers, or several ProTS dialers) - 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 Connecting, configuring and disconnecting the Dialer on page 345 for instructions).

The CATI Supervisor module monitors the current state of each Dialer and displays this information (see Connecting, configuring and disconnecting the Dialer on page 345 for details).

When the Dialer is connected and activated, interviewers can conduct interviews using this Dialer. The interviewer also has a choice of performing dialing manually, without the use of the Dialer - refer to Starting the CATI Interviewer Console and Logging In on page 237 for instructions.

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 Confirmit Authoring. 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 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 Confirmit Authoring) 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 CATI Supervisor) and it determines how the interviewer selects surveys/interviews he will work with (see Selecting a Survey/Interview on page 248 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 the next 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 Specifying scheduling script rules on page 214 for information on how to configure a scheduling script rule, and Appendix A - Action parameter descriptions on page 419 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 - please 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 Setting up the Preview dialing mode for an interview on page 147. No other actions should be performed in that case.

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. Refer to Adding and deleting an interviewer on page 30 for instructions on adding an interviewer to the system.

Single survey TCPA mode is disabled by default. It can be enabled by making 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”. Please 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 Viewing and modifying the interviewer properties on page 37) 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”. Refer to Viewing the interview/call list on page 110 for details.

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. Refer to Monitoring interviewers and their work on page 297 for details.

The “DialType” background variable can also be used in scripting. Please refer to the Confirmit Scripting manual for details.

8.3.1 Connecting, configuring and disconnecting the Dialer

The supervisor can perform the following operations with any dialer that is currently on the list:

- connect the dialer;
- connect and activate the dialer;
- configure the dialer settings
- de-activate the dialer;
- disconnect and de-activate the dialer.

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.

When the dialer is de-activated it becomes inaccessible to those interviewers who are not working with it at the moment. Yet 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.

The supervisor has an option of "terminating" all interviewers' sessions at the same time he/she disconnects/de-activates the dialer. This means that all interviewers' sessions will be cut short instantly and interviewers will be logged out at that point.

When the dialer is disconnected 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.

The CATI Supervisor module is capable of working with a number of dialers concurrently, please refer to Working with a number of dialers on page 350 to for more information. All available dialers are listed in the grid in the top right frame (one dialer per row). 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). Connecting a dialer beforehand saves time when you need to activate it promptly.

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 - see the picture below.

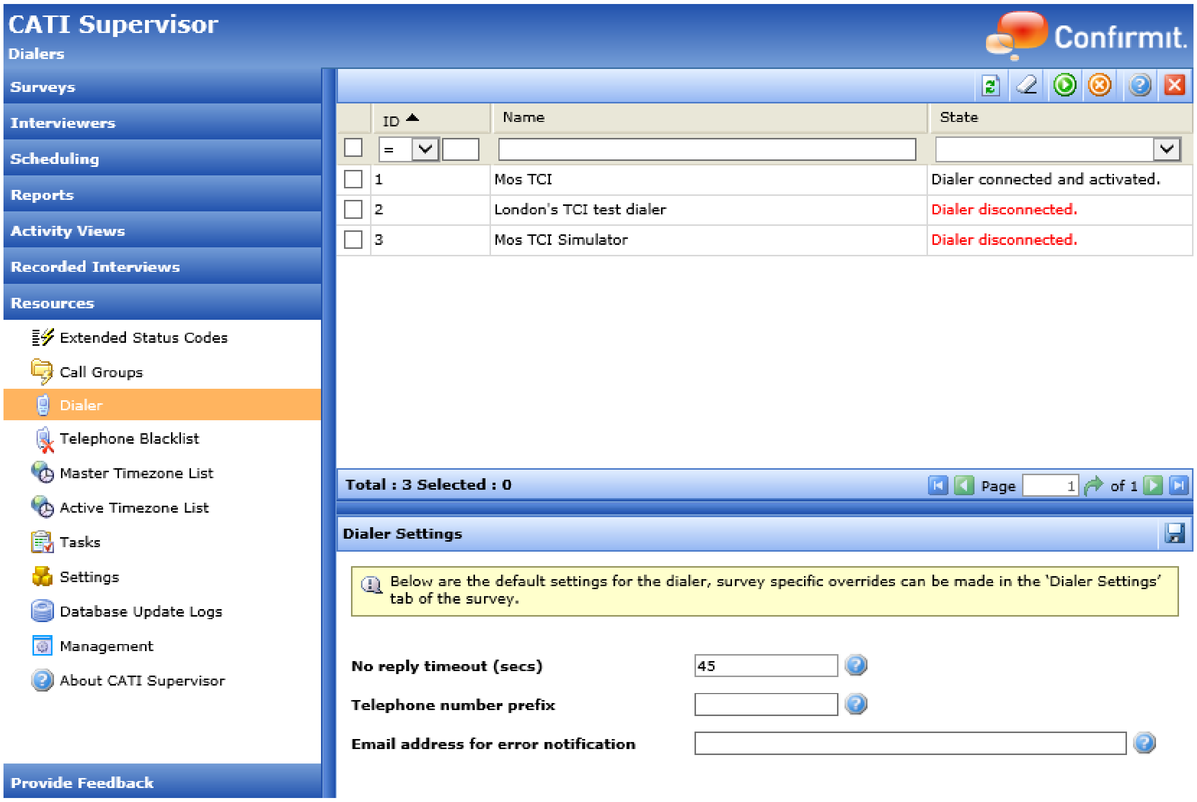


Figure 310 The list of dialers of the TCI type

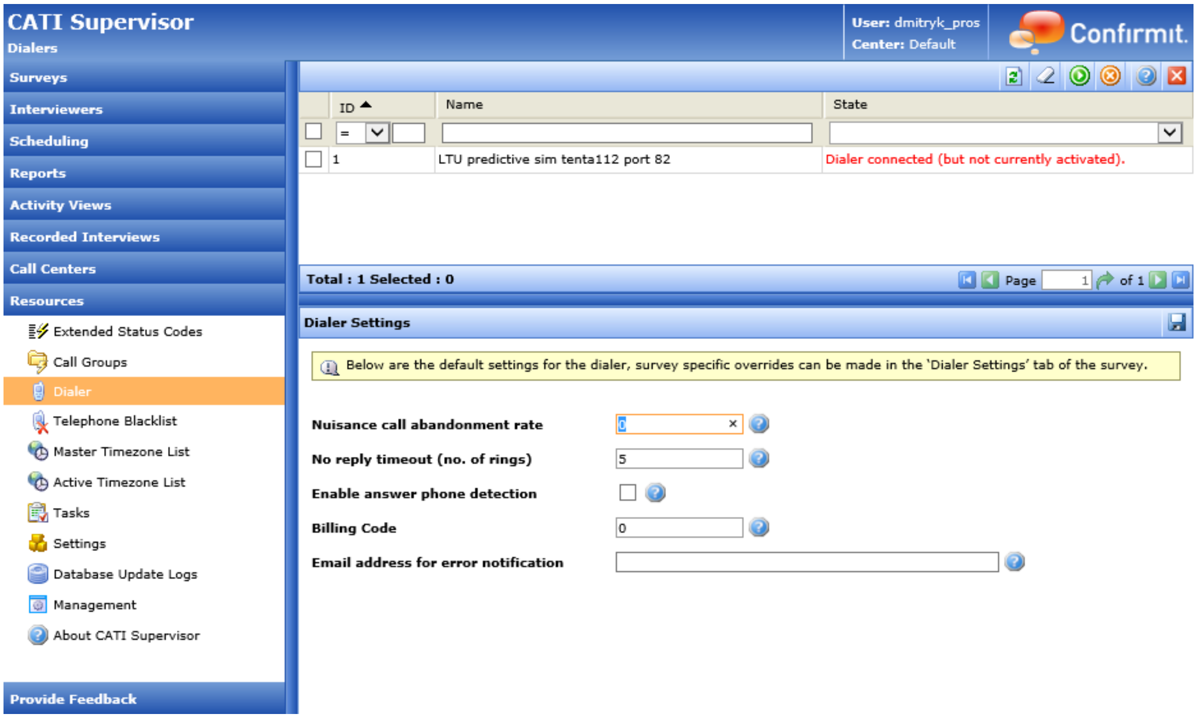


Figure 311 The list of dialers of the Pro-TS type

Dialers use a number of settings which can be configured. Dialer settings are displayed in the bottom right 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. But the dialer settings can be overridden for each particular survey (see Configuring the survey related dialer settings on page 97 for information). The set of dialer settings is different for different dialer types. Please 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:

- "This system is not connected to a dialer" - This message is displayed when the current company does not use a dialer at all to conduct surveys;
- "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. 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 the option of activating a dialer at the same time he/she connects to it, or de-activating a dialer at the same time he disconnects 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. Press 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.

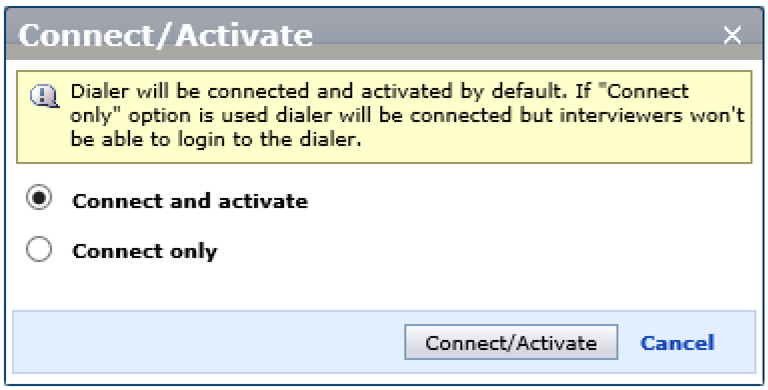


Figure 312 Connect/Activate dialog

Choose whether you want to connect and activate the dialer or only connect to it. Press 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 Dailer list.
2. Press 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.

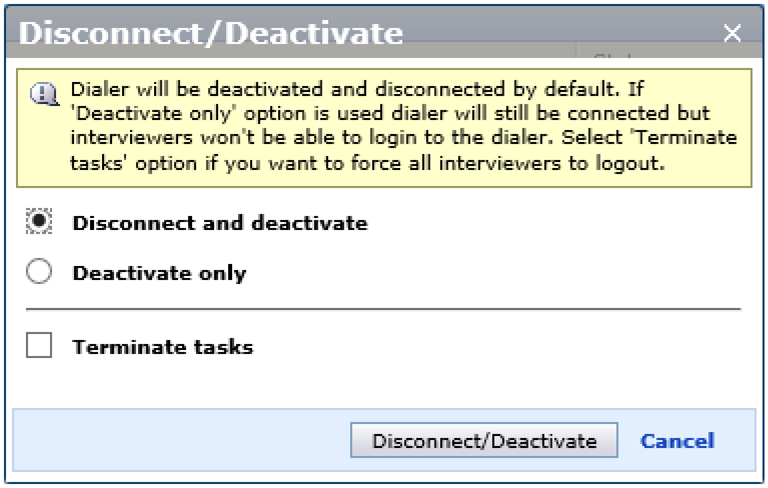


Figure 313 Disconnect/Deactivate dialog

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

Press the Disconnect/Disactivate 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".

To configure the Dialer settings:

1. In the Navigation Menu in the left frame choose the Dialer object (by double-clicking it) 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. The Dialer Settings view is displayed in the bottom right frame. These settings are the same for all currently used dialers.

The set of dialer settings is different for the TCI and Pro-T-S dialer types.

The following settings are available for 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:
  - 0 - 1 in 10,000 (.01%)
  - 5 - 5 in 1,000 (.5%)
  - 10 - 10 in 1,000 (1%)
  - 20 - 20 in 1,000 (2%)
  - 30 - 30 in 1,000 (3%)
  - 40 - 40 in 1,000 (4%)
  - 50 - 50 in 1,000 (5%)
  - 60 - 60 in 1,000 (6%)
  - 70 - 70 in 1,000 (7%)
  - 80 - 80 in 1,000 (8%)
  - 90 - 90 in 1,000 (9%)
  - 100 - 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. Press the Save button on the bottom right frame toolbar to save the dialer settings after all changes are made.

8.3.2 Working with a number of dialers

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.

CATI Supervisor imposes the following limitation in case a number of dialers is used with the system concurrently - all dialers must be of one and the same type. The system can use dialers of different types. But dialers of different types cannot be combined for simultaneous use.

The dialer settings are displayed in the bottom right frame. These settings pertain to all dialers that are currently used with the company (see Connecting, configuring and disconnecting the Dialer on page 345 for instructions on how to configure the dialer settings).

The picture below shows the list of dialers that are used with the current company.

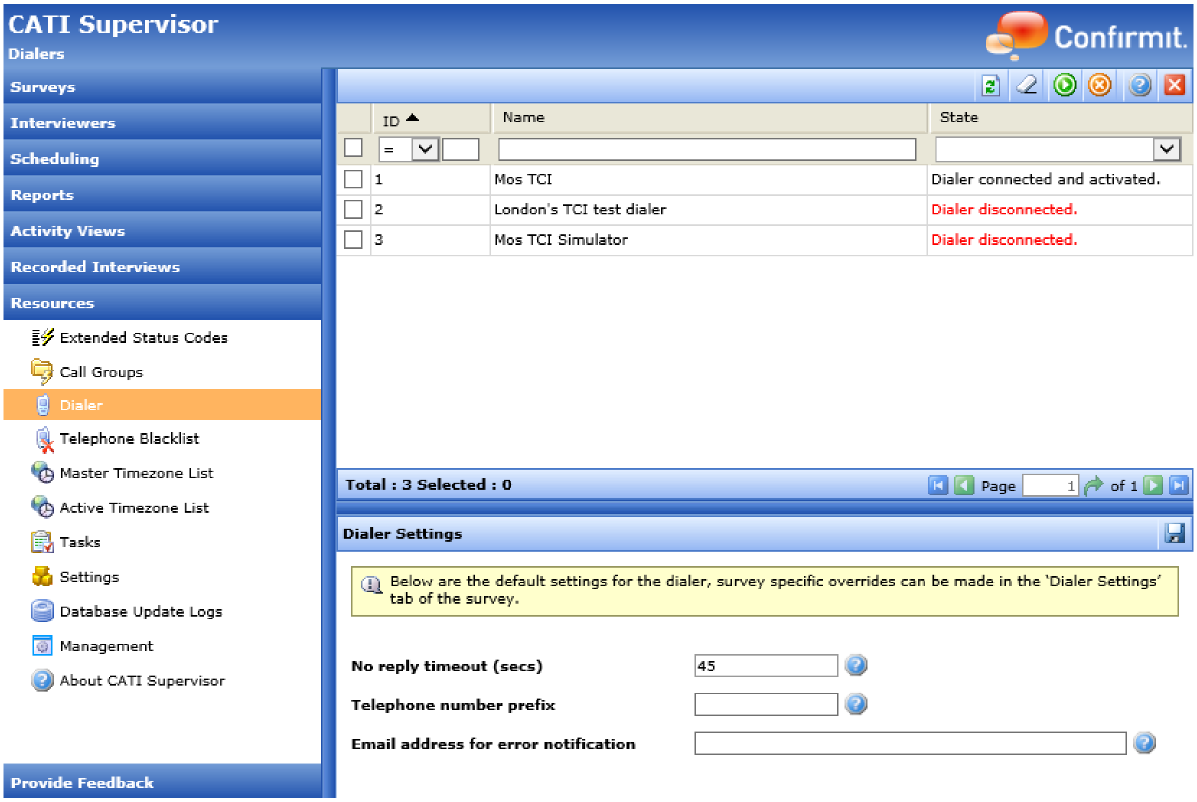


Figure 314 Multiple dialers used with a single company

Supervisor can perform the following operations with the dialers in the list:

- connect
- activate
- de-activate
- disconnect

configure dialer settings available via the CATI Supervisor User Interface.

Please refer to Connecting, configuring and disconnecting the Dialer on page 345 for instructions on how to perform these and other operations.

Supervisor cannot add or remove dialers from the list.

The supervisor must be aware that dialers are added or removed, and telephony related technical parameters are configured with the use of the special utility. This dedicated dialer configuration utility is used by the system administrator. CATI Supervisor module provides no access to this utility.

In case a number of dialers are used with the company each interviewer belonging to this company can work only with a single dialer when he is logged into the Interviewer's Console. This dialer is either selected automatically by the system, or it is specified as part of the Station ID which is entered by the interviewer at the moment he logs in to work with the CATI Interviewer Console (see Starting the CATI Interviewer Console and Logging In on page 237 for details).

When the dialer which the interviewer currently works with is de-activated, and the interviewer is going through an interview at the moment, the interviewer will be able to finish this interview. Then he/she 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 is logged into the Interviewer Console.

When the dialer is disconnected 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 press the Terminate icon in the grid for the corresponding interviewer (see Monitoring interviewers and their work on page 297 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.

8.4 Creating and managing the telephone number blacklist

CATI Supervisor provides a way to block the unwanted telephone numbers to be dialed. This option is applied on the company level - the telephone number list which includes numbers that should not be dialed, 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 the supervisor should create such 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 - please 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 to enable it).

The created telephone number blacklist can be edited - numbers can be added or deleted from it at any time.

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 (see Viewing and modifying general properties of a survey on page 63).

To facilitate the blacklist creation the supervisor can import a file containing telephone numbers.

Please note that the amount of numbers in the telephone blacklist should not exceed the maximum of 4,000,000 telephone numbers.

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

The same check is performed by the system whenever a fresh sample list is being uploaded (this operation is performed by means of the Confirmit Authoring module, please refer to the Confirmit Authoring documentation for instructions). Each telephone number from each sample list record is checked against the blacklist. When a match is found, the corresponding interview is assigned the "Blacklist" extended status.

The count of numbers that are blocked by the Blacklist procedure at the sample loading is logged and shown in the Sample Utilization Report (see Generating the Sample Utilization Report on page 402) in the "Blocked by blacklist" column.

Please note that interviews/calls will not get executed via the survey scheduling rules even if the sample was loaded with the "Full Scheduling" option enabled.

To create/edit a telephone number blacklist:

1. In the left navigation frame choose the Resources object tab, then choose Telephone Blacklist inside it. The right frame will display the grid containing numbers already included in the blacklist (if any). If the blacklist does not contain any numbers, the grid will appear empty.

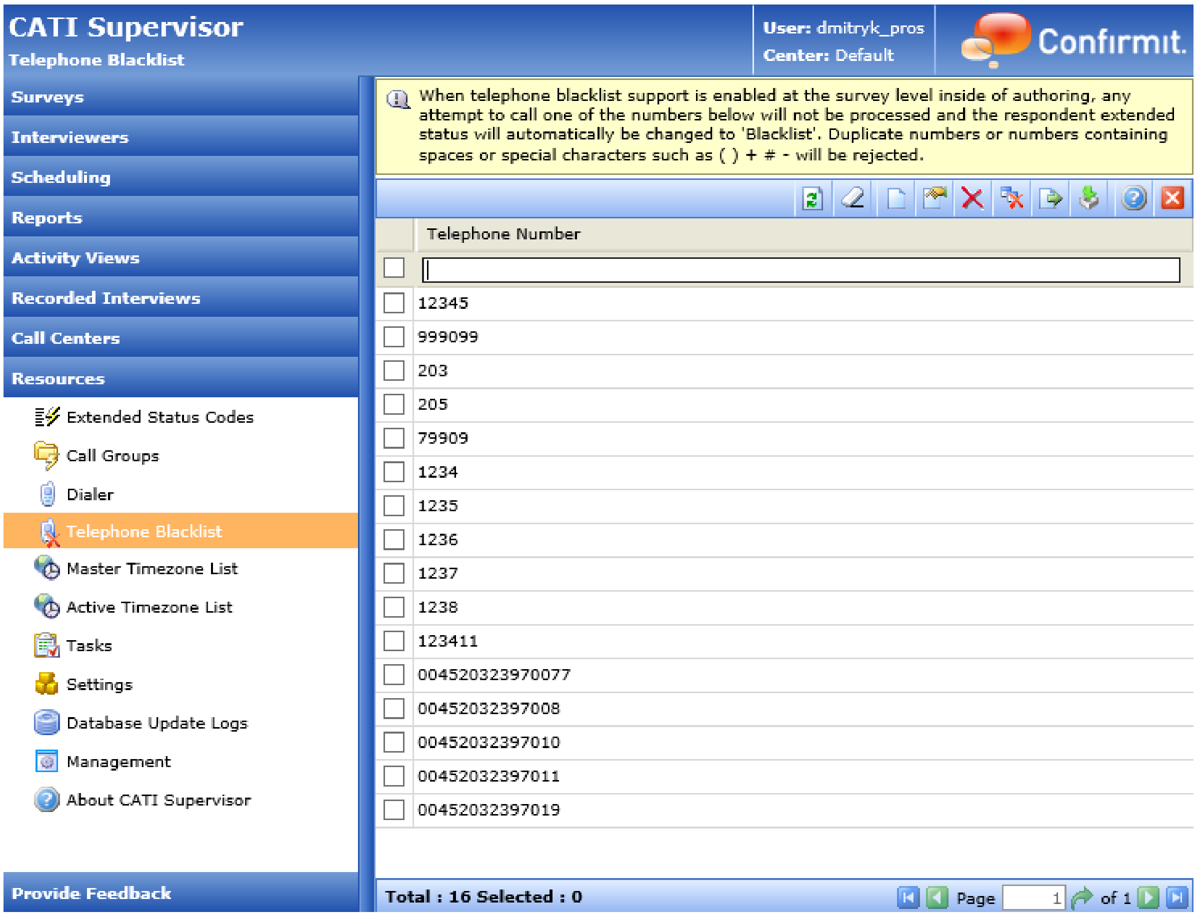


Figure 315 The Telephone number blacklist displayed in the right frame

2. To add a number to the blacklist press 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. This will display the Telephone Number dialog.

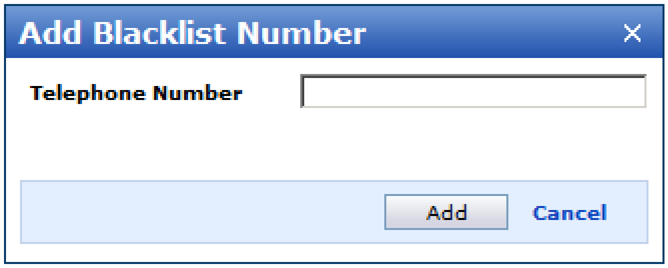


Figure 316 Adding the telephone number to the blacklist

Enter the number in the field. Duplicate numbers, or numbers containing spaces, or special characters such as ( ) + # - will be rejected.

Press Add to add the number to the list. This will create a new row in the grid containing the added number.

Press Cancel to cancel the number addition.

3. Any existing number from the blacklist can be edited. Select the required number and either press the Edit button on the toolbar, or right-click the desired number and choose Edit from the context menu that appears.

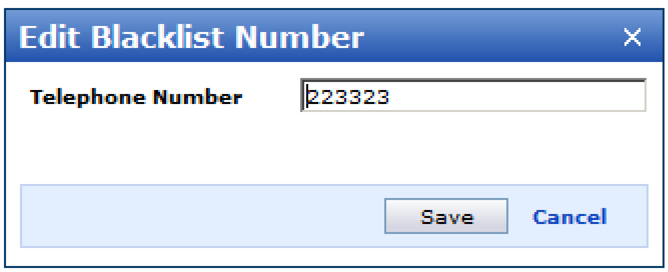


Figure 317 Editing the telephone number from the blacklist

This will display the Telephone Number dialog with the selected number ready for editing. Edit the number as desired. Remember that duplicate numbers, or numbers containing spaces, or special characters such as ( ) + # - will be rejected.

Press Save to save the edited number.

Press Cancel to cancel editing. The selected number will not change.

4. To delete a number (or several numbers at once) select the number(s) in the grid in the right frame and either press the Delete button on the toolbar, or right-click anywhere inside the grid and choose Delete from the context menu that appears. The dialog box asking you to confirm the action will appear.

Press OK to confirm deletion. This will remove the selected number(s) from the blacklist.

Press Cancel to cancel the number deletion. The selected number(s) will not be deleted.

To delete ALL numbers in the telephone blacklist you can press the Delete All button on the toolbar. This will display the prompt asking you to confirm the action. Press OK to confirm deletion. All blacklisted numbers will be removed from the system then (not only the list that is displayed on the current page).

5. You can export 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.

   Press the Export Blacklist button  on the toolbar to start the procedure. You will be prompted what you want to do with the exported file: save, open etc.

6. You can speed up the blacklist creation by importing the file that already contains the list of required telephone numbers.

   This file should be a plain text file, with all telephone numbers arranged in a single column (without a header), one number per row. You can use the file to which you once have exported blacklist number list using the export procedure described in the previous step.

   Duplicate numbers, or numbers containing spaces, or special characters such as ( ) + # are not allowed - such numbers will be rejected when the import procedure starts.

   To import a file containing telephone numbers press the Import button  on the toolbar. This will display the Select file for import dialog.

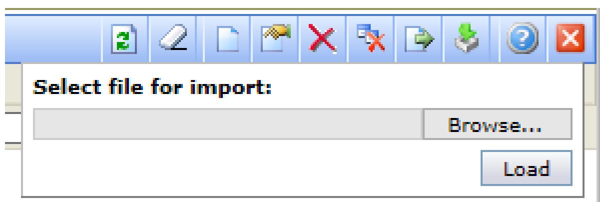


Figure 318 Importing the file containing telephone number list

Enter the path to the file in the Select file for import field, or press the Browse button in this dialog box. When you press the Browse button, the standard Windows Open file dialog box will be displayed. Choose a file for import using this standard dialog box. When the path to the file is displayed in the Select file for import field, you can press the Load button. The import process is started and in a while 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 box you should simply click anywhere outside this dialog box. Do this before pressing the Load button. You cannot abort the import operation once it is started.

8.5 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 both for a "normal", and for an "administrator" supervisor. The difference is in the range of tasks which are available for them: "normal" supervisor has access only to the tasks pertaining to his call center, while "administrator" can access any task that has ever been run in any call center existing in his/her company.

The Tasks view lists tasks of the following types:

- Launch Survey,
- Restore Survey,
- Change Dial Modes Of Interviews,
- Activate Calls,
- Enable Calls,
- Move Calls,
- Move And Reschedule Calls,
- Change Priority Of Calls,
- Change Shift Type Of Calls,
- Assign Calls,
- Delete Calls.

Also any supervisor has the right to abort tasks while they are in the "Executing" status (please refer to the instruction below).

This view provides the following information regarding each task:

- Task ID,
- User ID,
- Survey ID,
- Task type,
- Status,
- Start time,
- Duration,
- Elapsed time

To view the list of supervisor tasks

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.

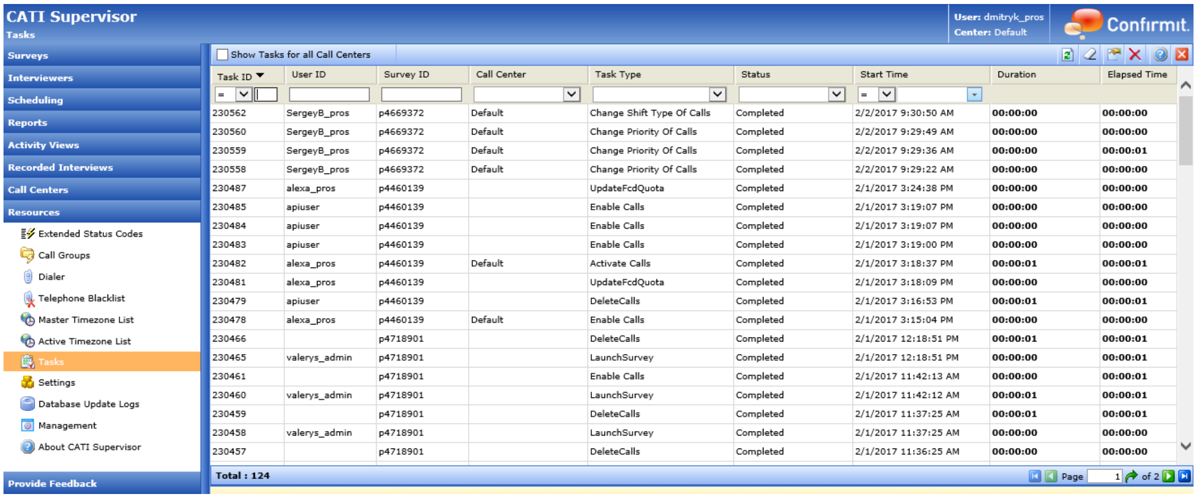


Figure 319 Watching the list of tasks performed by the current supervisor ("administrator" account)

In the picture above pay attention to the current call center name displayed in the dedicated section in the top frame and compare it against the call center name displayed in the corresponding grid column. They are the same.

The Show Tasks for all Call Centers box is cleared which means you can see only tasks pertaining to the current call center.

The Show Tasks for all Call Centers box is checked in the picture below. Now you can see tasks that have ever been run in all call centers existing in the company.

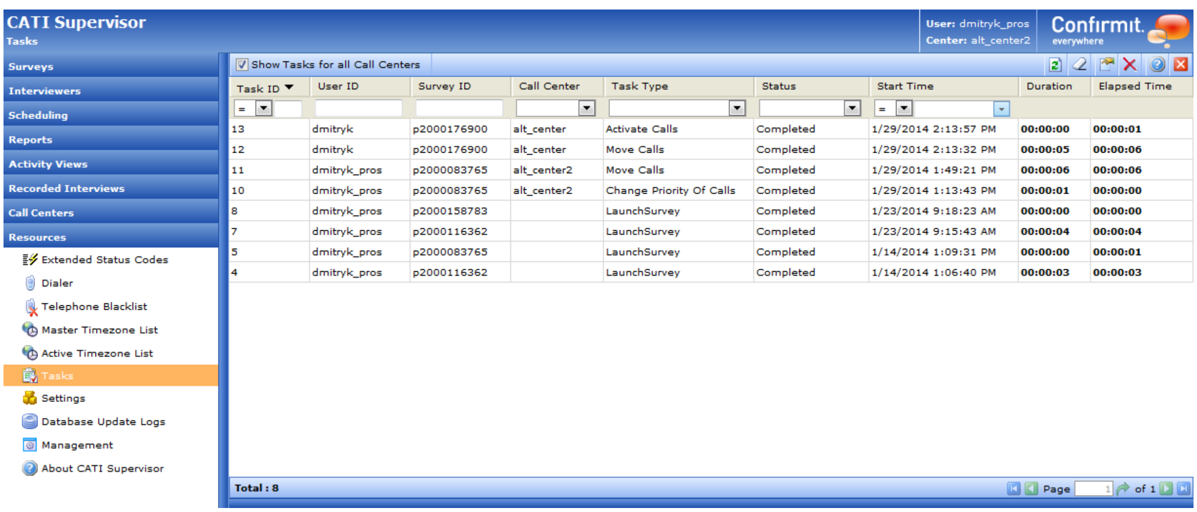


Figure 320 Watching the list of tasks performed by all supervisors ("administrator" account)

2. Pay attention to empty values in the Call Center column in the pictures above. These empty values correspond to one event only - survey launch. Although containing empty call center values, these tasks can still be filtered by the call center (the current call center of the performing supervisor detected at the time the survey was launched is used as the task parameter).
3. When a "normal" supervisor is logged in, the Show Tasks for all Call Centers box is absent. "Normal" supervisors can access only tasks performed by all supervisors belonging to the same call center as he/she belongs to.

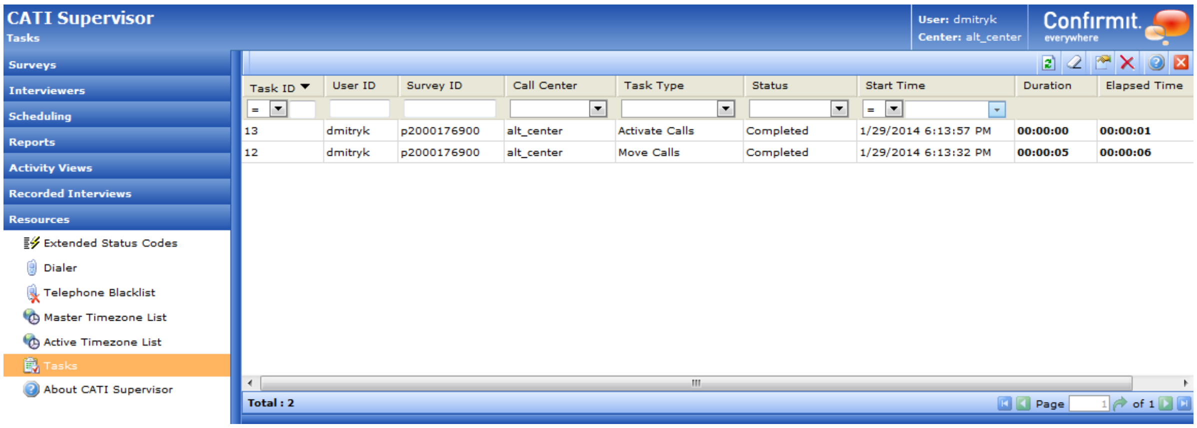


Figure 321 Watching the list of tasks performed by the current supervisor ("normal" account)

4. Any supervisor can view details of the selected task. To do this he /she has 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. Choose a tab to browse information contained in that tab.

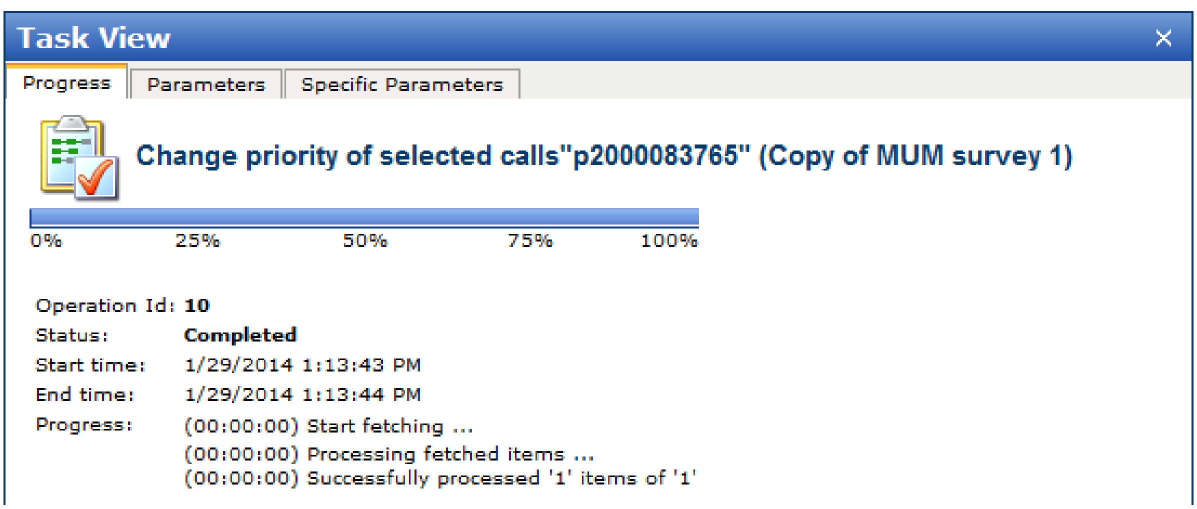


Figure 322 Task View dialog window - Progress tab

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).

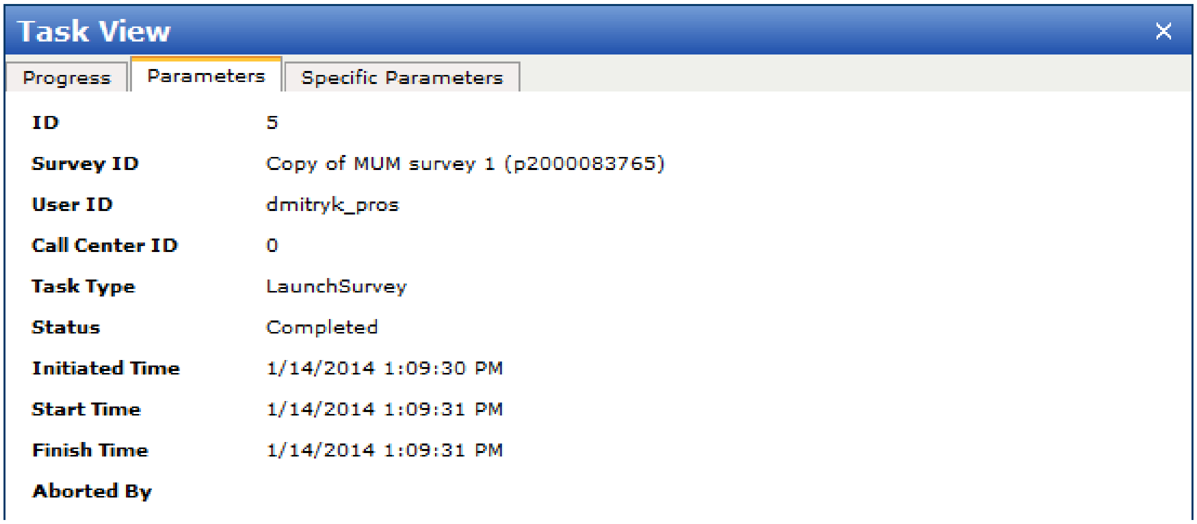


Figure 323 Task View dialog window - Parameters tab

The Parameters tab contains general task parameters.

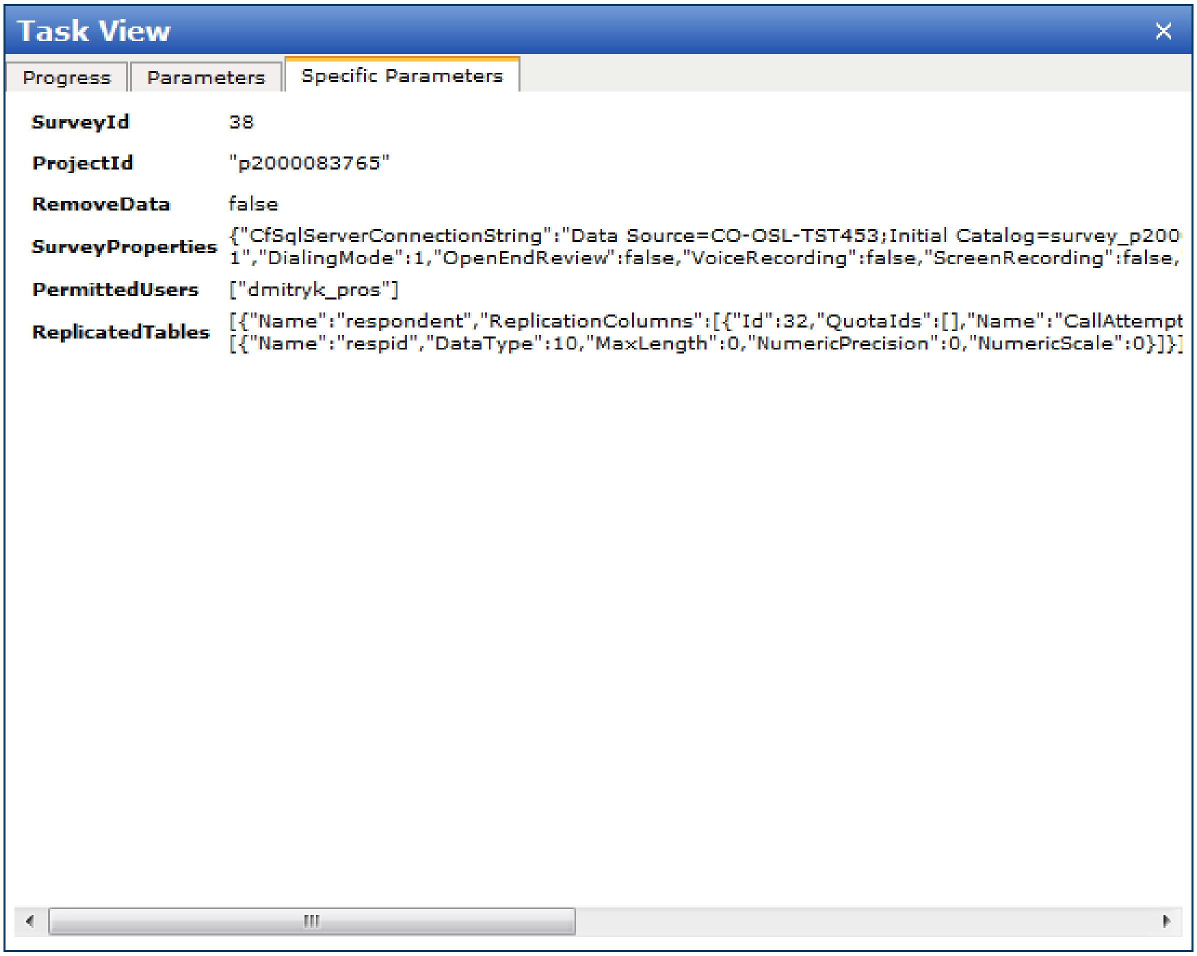


Figure 324 Task View dialog window - Specific Parameters tab

The Specific Parameters tab shows certain configuration and run parameters of the selected task.

Press the cross button in the top right corner of the dialog window to close the window.

5. 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 Abort button  on the frame toolbar. The aborted task will be assigned the "Aborted" status.

8.6 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 on page 362 for instructions.

For information on the bias offset for a timezone and for a complete reference list of timezones please see Appendix E - Time Zone List on page 427.

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.

8.6.1 Viewing the Master Timezone list

To view the Master Timezone list:

1. Double-click Master Timezone List item in the list in the left Navigation frame, or right-click its name and choose List from the shortcut menu. This will display the list of Master Timezones. The list is displayed in the top right frame of the CATI Supervisor main window.

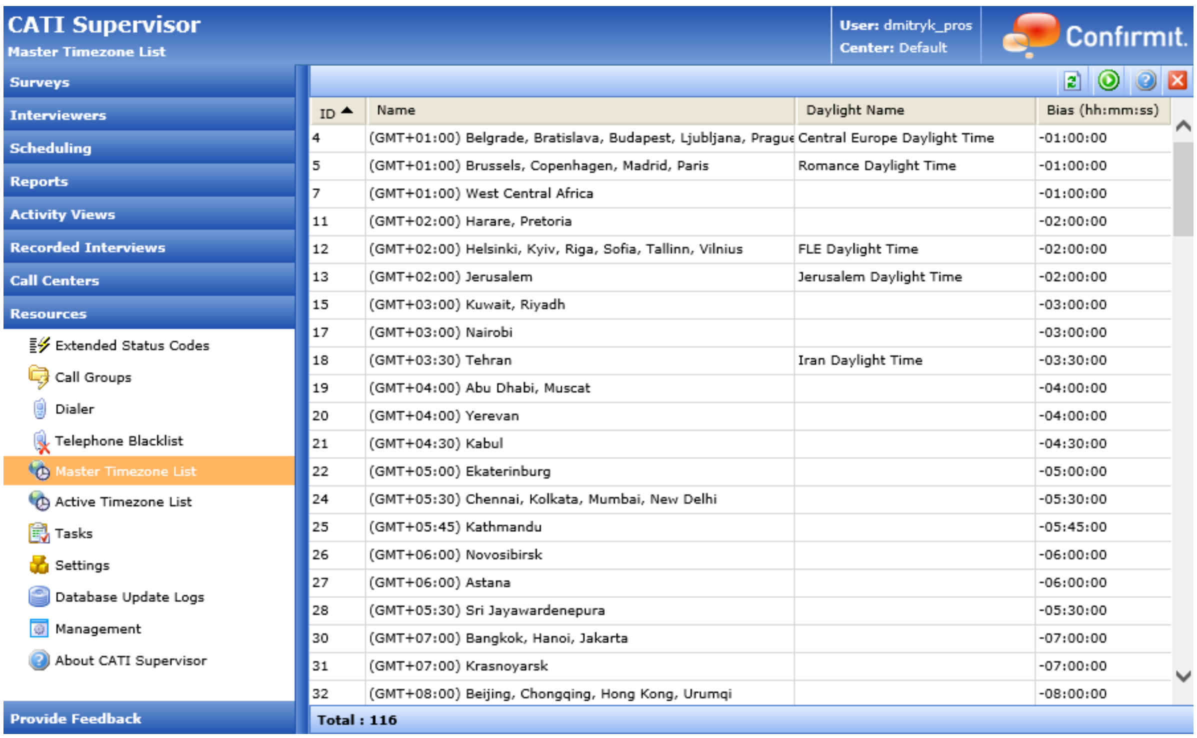


Figure 325 Viewing the Master Timezone list in the top right frame

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
	CLOSE WINDOW	Closes the CATI Supervisor dialog window

8.6.2 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 press 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 below for details).
3. Repeat the procedure for other Master Timezones if required.

8.7 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 on page 360 for instructions.

For information on a timezone bias and for a complete reference list of timezones please see Appendix E - Time Zone List on page 427.

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.

8.7.1 Viewing the Active Timezone list

To view the Active Timezone list:

1. Double-click Active Timezone List item in the list in the left Navigation frame, or right-click its name and choose List from the shortcut menu. This will display the list of Active Timezones. The list is displayed in the top right frame of the CATI Supervisor main window.

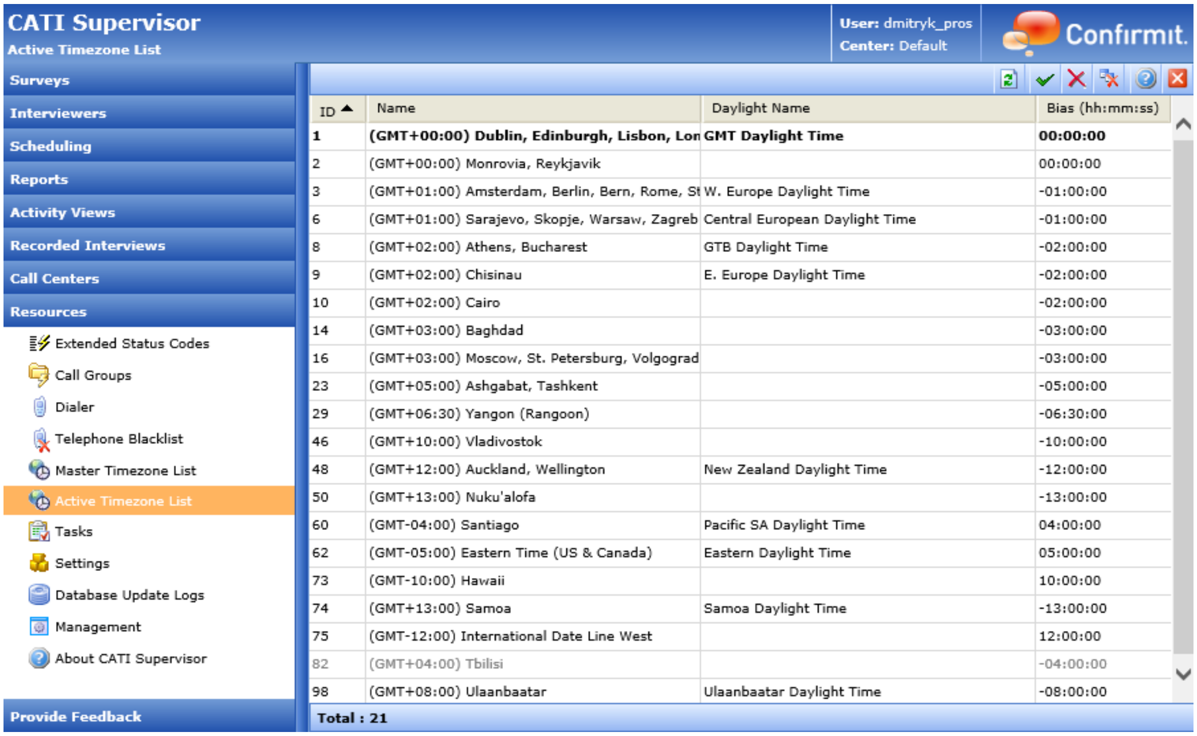


Figure 326 Viewing the Active Timezone list in the top right frame

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 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
	CLOSE WINDOW	Closes the CATI Supervisor dialog window

8.7.2 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 right frame and press 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.
2. 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 again.

8.7.3 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 right frame and press 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.

8.7.4 Deleting the unused Active Timezones

To delete the unused Active Timezones:

1. In case the Active Timezone List is populated with timezones you do not use as properties with other objects you may wish to clear up this list and remove such timezones.

   To do this you should click any row in the grid in the top right frame and press 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).

8.8 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 can be found on the Settings tab in the Resources menu: they are grouped using the correspondingly named tabs:

General settings including:

- 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

Interviewer console settings including:

- settings that help configuring buttons (and corresponding functions) available through the CATI Interviewer Console interface;

Security settings including:

- a security feature that helps locking an interviewer account and managing password expiration and reset settings;

Note that the Settings menu (and the corresponding user interface described in related topics) is available only for supervisors who are granted administrator rights (the corresponding option is configured in the Confirmit Authoring module - please consult the Confirmit Authoring manual). In case the supervisor who was not granted the administrator rights logs in to work with the CATI Supervisor module he would not be able to see the Settings tab at all.

Comments concerning this topic? Send an email

8.8.1 General settings group

This group of settings can be found on the General tab (see the picture below).

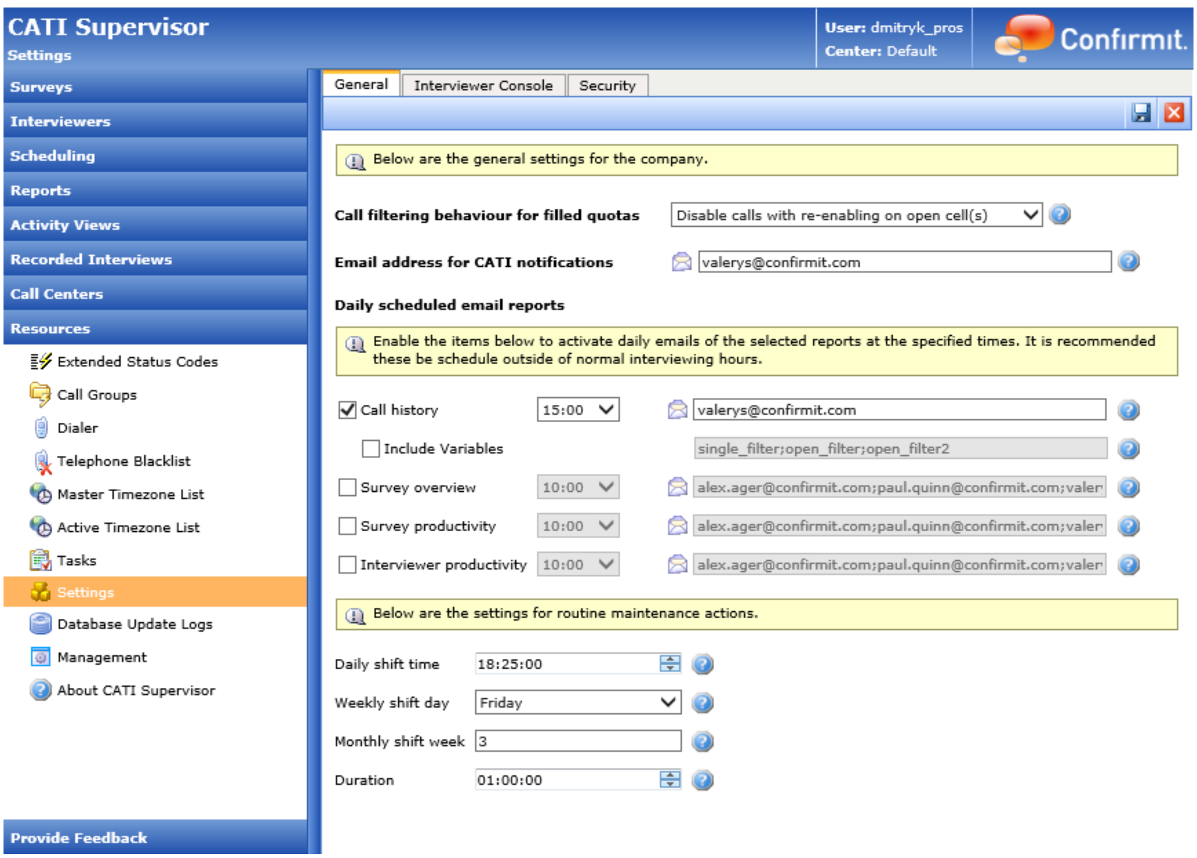


Figure 327 The General tab of the Resources menu

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. 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 high-lighted in yellow (see Disabling and enabling calls on page 120 regarding the color highlighting of the disabled calls).

Note that there is another setting that gives you even more control over which calls should not be removed upon quota closure. You can specify calls with certain extended statuses that will behave that way - refer to Viewing and modifying the Extended Status Code group properties on page 331 for instructions.

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 inter-viewer 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.

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 preconfigured 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 Exporting call history data on page 181). 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 3 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).

The report emailing settings can only be configured at the company level without any further customization of fil-tering 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.

Comments concerning this topic? Send an email

8.8.2 Interviewer Console settings group

This group of settings can be found on the Interviewer Console tab (see the picture below).

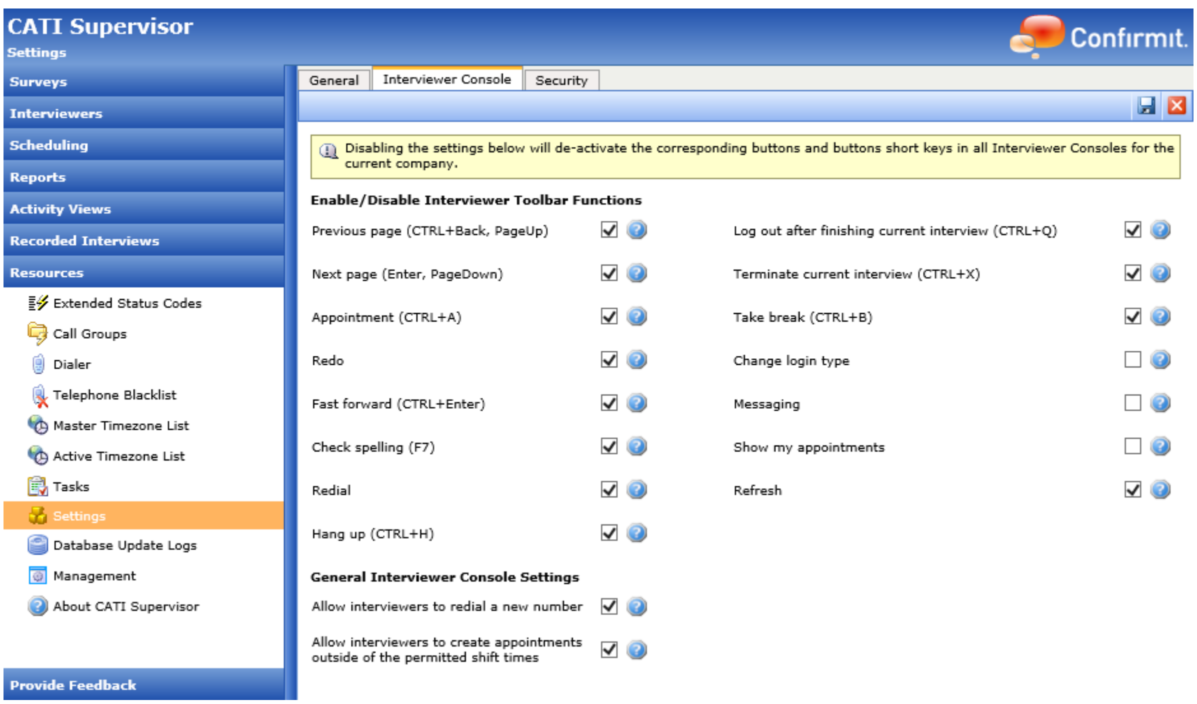


Figure 328 The Interviewer Console tab

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.

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). Please refer to The Redial functionality in the CATI Interviewer Console on page 282 for description of the Redial functionality.

There is an option that allows preventing interviewers to create 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 (see Making an appointment on page 274 for description of the Appointment window).

Comments concerning this topic? Send an email

8.8.3 Security settings group

This group of settings can be found on the Security tab (see the picture below).

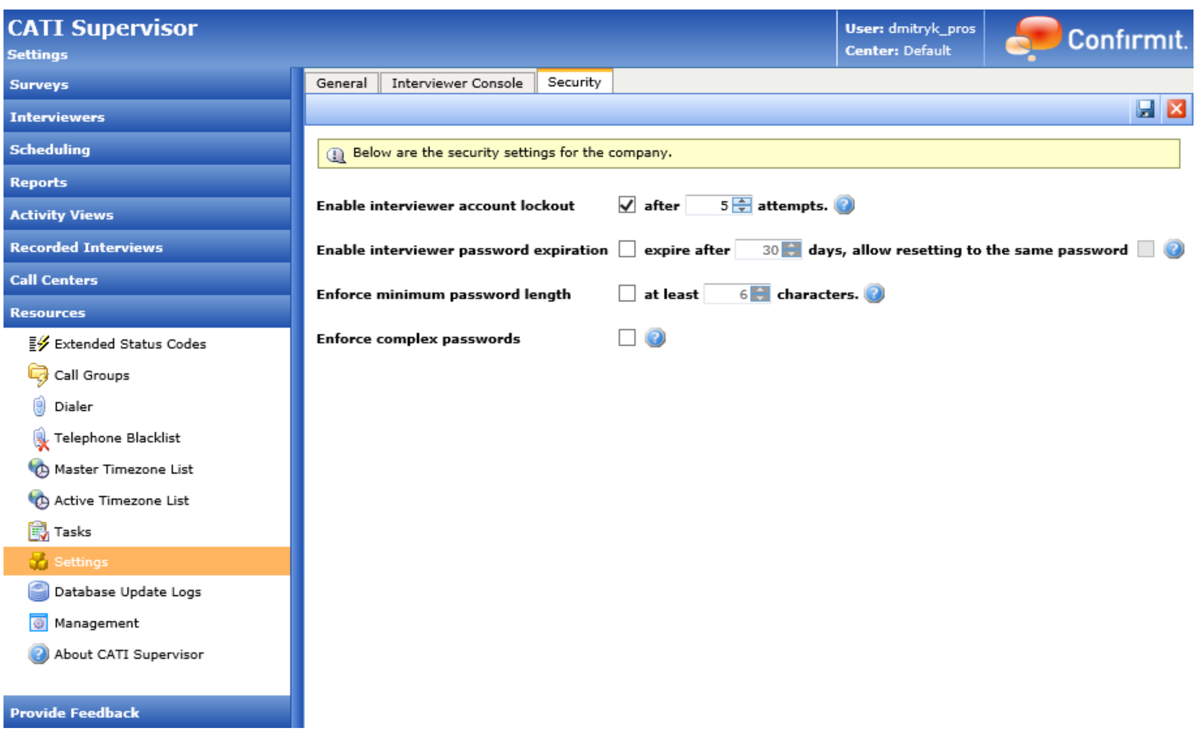


Figure 329 The Security tab of the Resources menu

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 Locking and unlocking the interviewer's account on page 33 for details).

Please remember 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 please use the procedure described in Locking and unlocking the interviewer's account on page 33.

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 Locking and unlocking the interviewer's account on page 33 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 press 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.

8.9 Checking Database Update Logs

This functionality is available for "administrator" supervisors only (see Call Center management on page 184 on details regarding the "administrator" permissions).

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. Choose the Settings tab in the Resources object menu in the Navigation frame. Choose the Database update logs object. This will display the complete list of database updates.

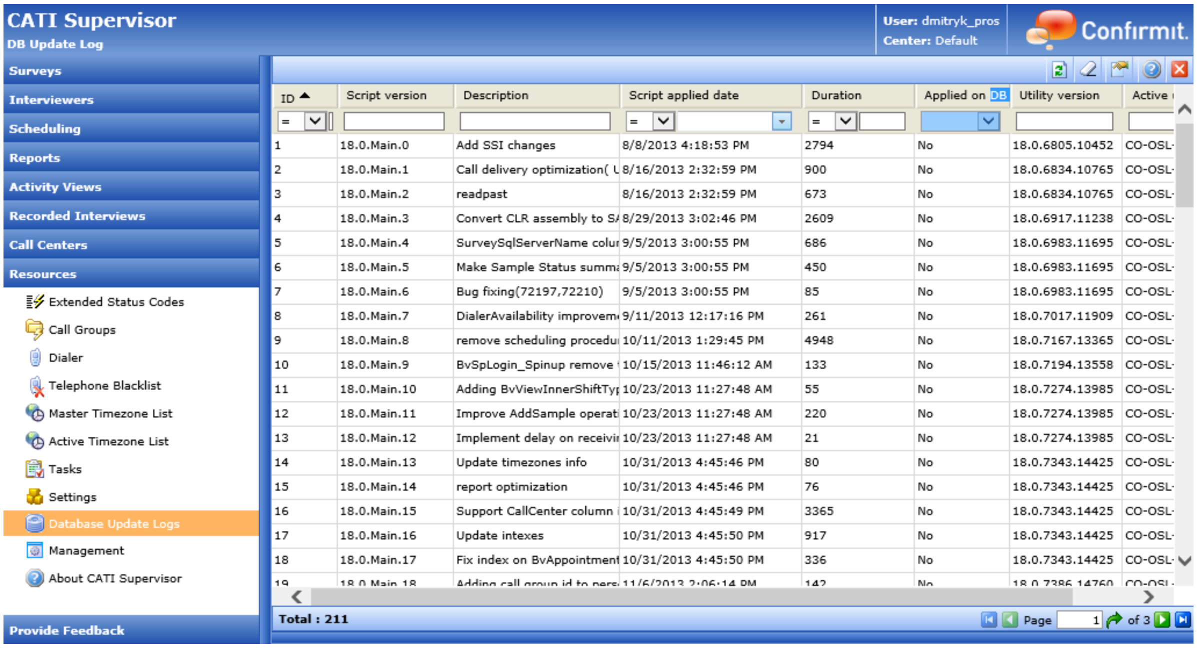


Figure 330 Checking the database update log list

2. The update list view provides the user with 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.

3. 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 press the Details button on the right frame toolbar. This will display the Details dialog window.

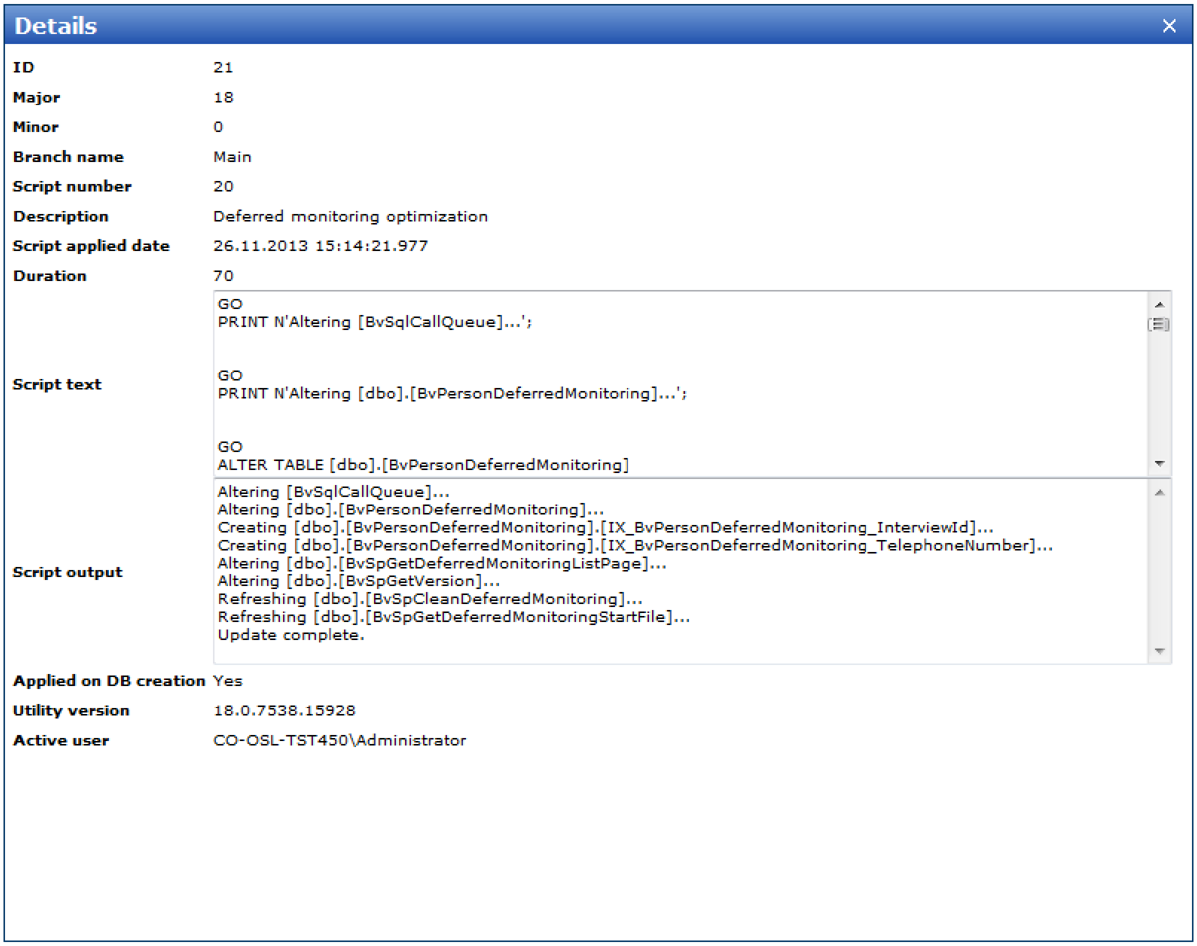


Figure 331 Checking database update details

The Details dialog window contains more in-depth details that will help you study what and how was changed in the course of this update. 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.

8.10 Saving interviewer activity data

This functionality is available for "administrator" supervisors only (see Call Center management on page 184 on details regarding the "administrator" permissions).

Confirmit system saves data regarding interviewer activity to the database regularly at the end of each specified time period. Administrator supervisor can perform this action manually whenever required.

To save interviewer activity data

1. Choose the Settings tab in the Resources object menu in the Navigation frame. Choose the Management object. This will display a single button and a hint in the right frame.

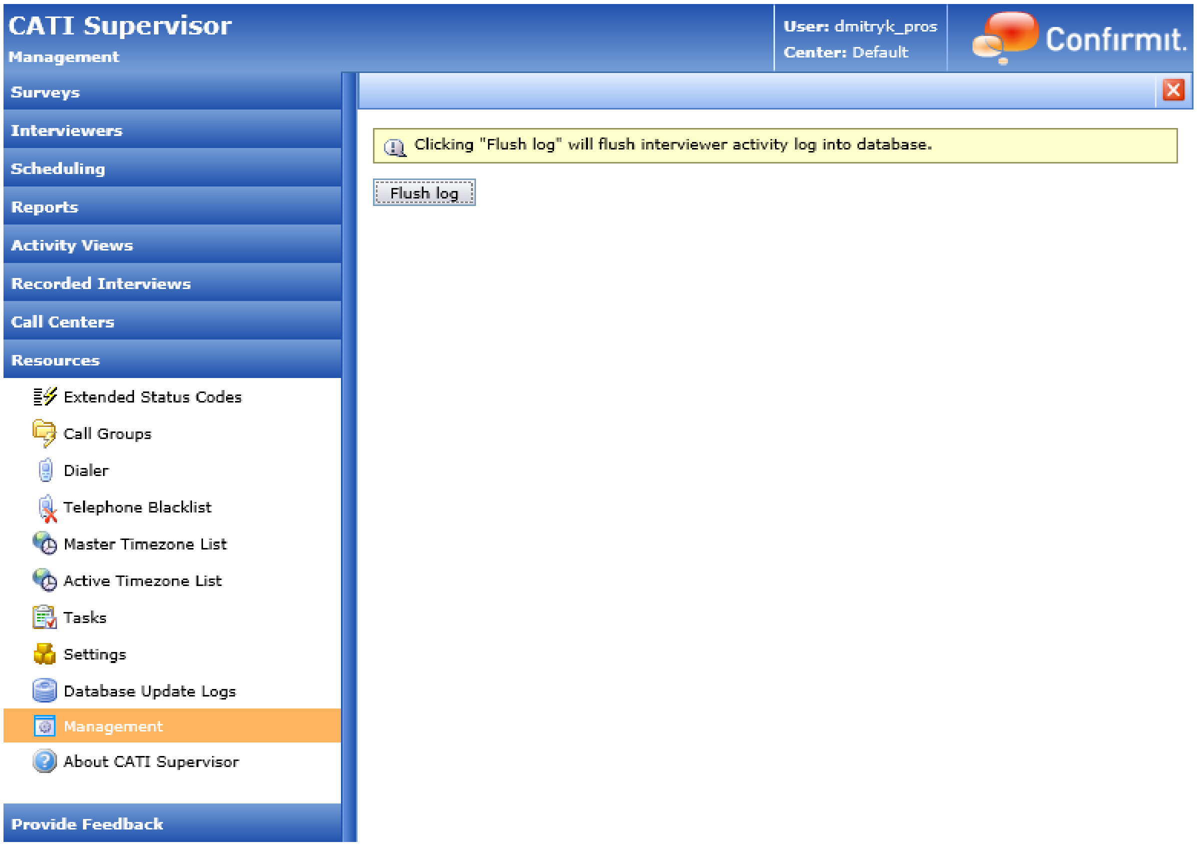


Figure 332 Saving the interviewer activity data manually

2. Press the Flush log button. You will not be prompted, the operation is performed silently. The appropriate data will be saved to Confirmit system database.

8.11 Viewing software version and copyright information

You can view general information regarding the version of the CATI Supervisor module, and existing copyright.

To view the About information:

1. Double-click the About item in the list in the left Navigation frame, or right-click its name and choose View from the shortcut menu. This will display the information regarding the current software version number, and the copyright information. All this information is displayed in the top right frame of the CATI Supervisor main window.

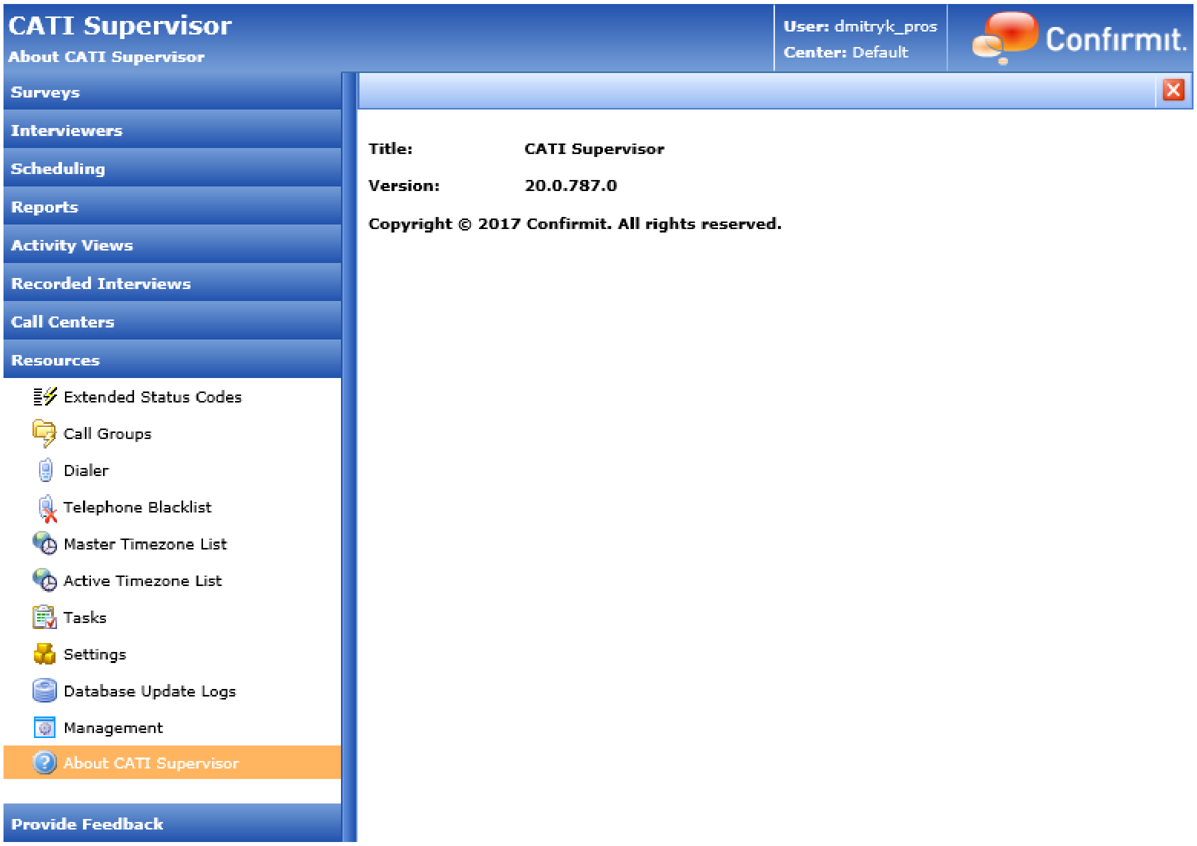


Figure 333 Viewing the general software information

9 Generating reports in the CATI Supervisor

Reports in the CATI Supervisor module provide statistics pertaining to certain objects.

The CATI Supervisor provides the user with the possibility of generating the following reports:

- Survey Overview (see Generating the Survey Overview Report on page 375)
- Survey Productivity report (see Generating the Survey Productivity Report on page 380)
- Interviewer Productivity (see Generating the Interviewer Productivity Report on page 385)
- Interviewer Sessions (see Generating the Interviewer Sessions report on page 391)
- Sample Status Summary (see Generating the Sample Status Summary report on page 395)
- Sample Utilization report (see Generating the Sample Utilization Report on page 402)
- Call Attempts Log (see Viewing the Call Attempts report on page 405)
- Quota Progress report (see Generating the Quota Progress Report on page 394)
- Attempts by Disposition (see Generating the Attempts by Disposition report on page 408)
- Number of Attempts (see Generating the Number of attempts report on page 410)
- Interviewer Submission Details (see Viewing the Interviewer Submission Details Log on page 413)
- Aggregated Interviewer Submission (see Generating the Aggregated Interviewer Submission Report on page 414)

Reports can be configured with the help of interface provided by the Report objects.

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.

Supervisor has to choose the Reports item in the left Navigation frame to access the list of the Reports objects.

All operations with the Report objects are begun by navigating to the appropriate object list. The list of Report objects (types) is displayed in the left Navigation frame as a tree structure containing 3 categories - Productivity, Calls, and Alerting. To display the list of the corresponding report types you should either click the plus sign in the tree view in the Navigation frame, or right-click the desired category name, and choose List from the context menu that appears. When the List command is performed the list of reports included into the chosen category appears in the top right frame. Report list in the top right frame is displayed in the grid and is accompanied with short descriptions of the available report types.

To generate a report the supervisor should first select the report type. The report of the chosen type then opens in the top right frame, and the Supervisor can proceed with configuring the report.

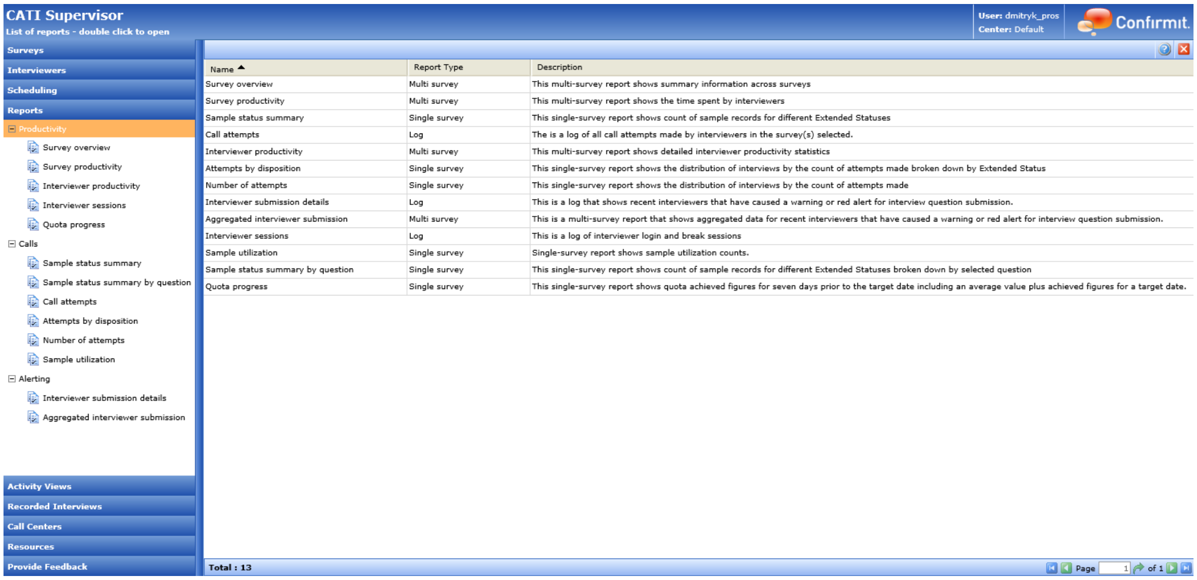


Figure 334 The Reports object list

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 the Reports object tab in the left Navigation frame.
2. Double-click the Survey Overview item in the left Navigation frame, or double-click this report type in the list in the top right frame. You can also right-click the Survey Overview item in the left Navigation frame and choose Show from the context menu that appears.

   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 in the top right frame (in the separate window if you run the command from the Surveys list).

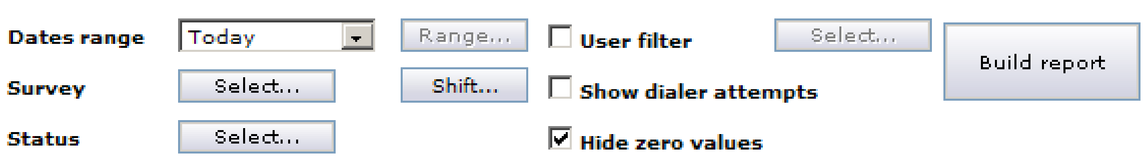


Figure 335 Configuring the Survey Overview Report

This interface lets you configure all the parameters required to generate the Survey Overview Report.

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 (the "Range" item in the list) – in this case the Range button on the right of this field becomes available. Press the Range button to display the Date Range form.

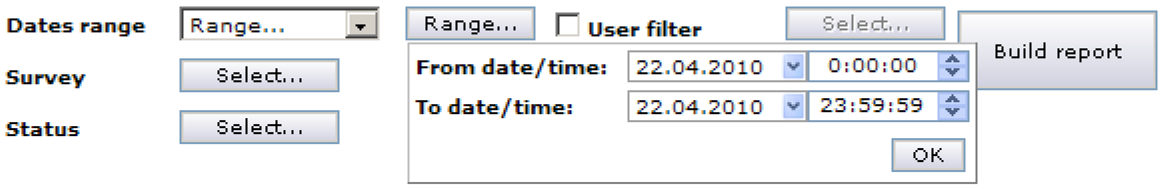


Figure 336 Choosing the date range for the Survey Overview Report

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 press 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. Press 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. Press 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 press the Shift button, the Select Shift modal window is displayed (see the picture below).

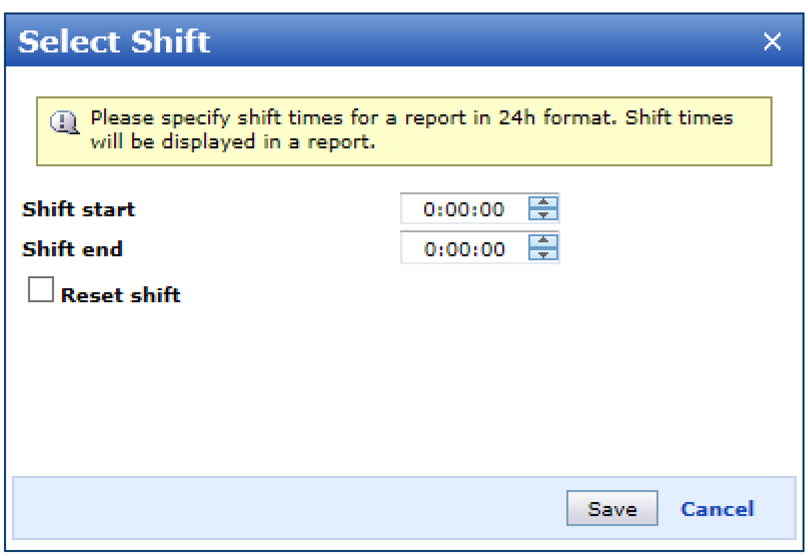


Figure 337 Choosing the Shift start and end times

Choose the desired start and end times of the shift using corresponding spin controls.

Press 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 press the Shift button and check the Reset shift box in the modal dialog window. Then you should press 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. Press the Select button and check the required statuses in the scrollable list that appears. Press OK below this list to confirm this setting.

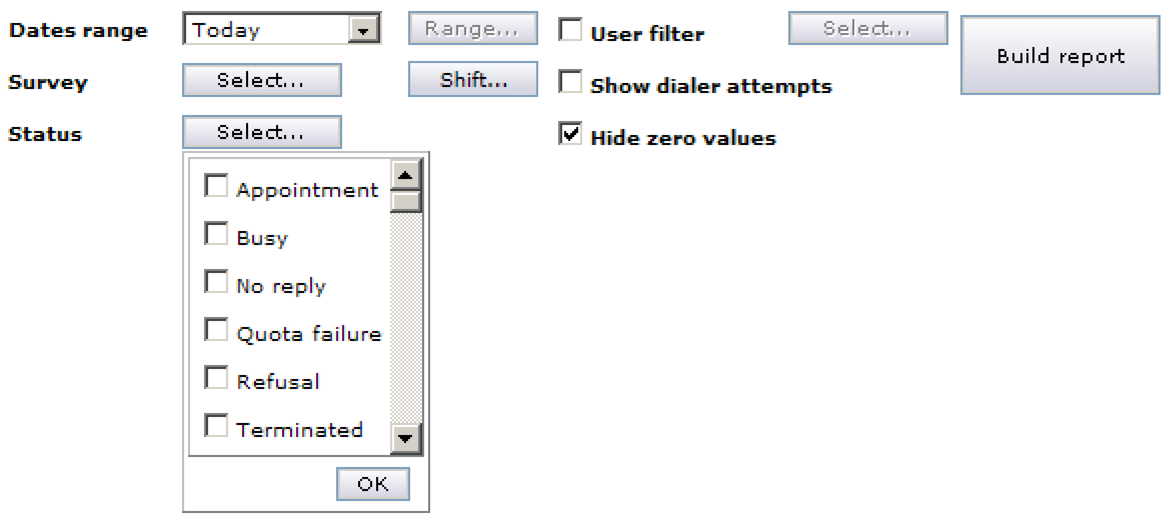


Figure 338 Selecting extended statuses to include into the Survey Overview Report

6. Select a single survey (or a number of surveys) for which the report will be generated. Press the Select button (Survey) to display the Select Surveys dialog window (see description of this form here - Selecting surveys to display in the grid in the Survey List activity view on page 291). Press Save selected in this dialog window to save this setting.
7. 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.
8. You can also exclude all interviewers that never logged in to work with the Interviewer Console during the period selected for the current report.

   To exclude such "inactive" interviewers you should check the Hide zero values box.
9. 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 press the Select button next to this box to display the Select Interviewers/Groups dialog window.

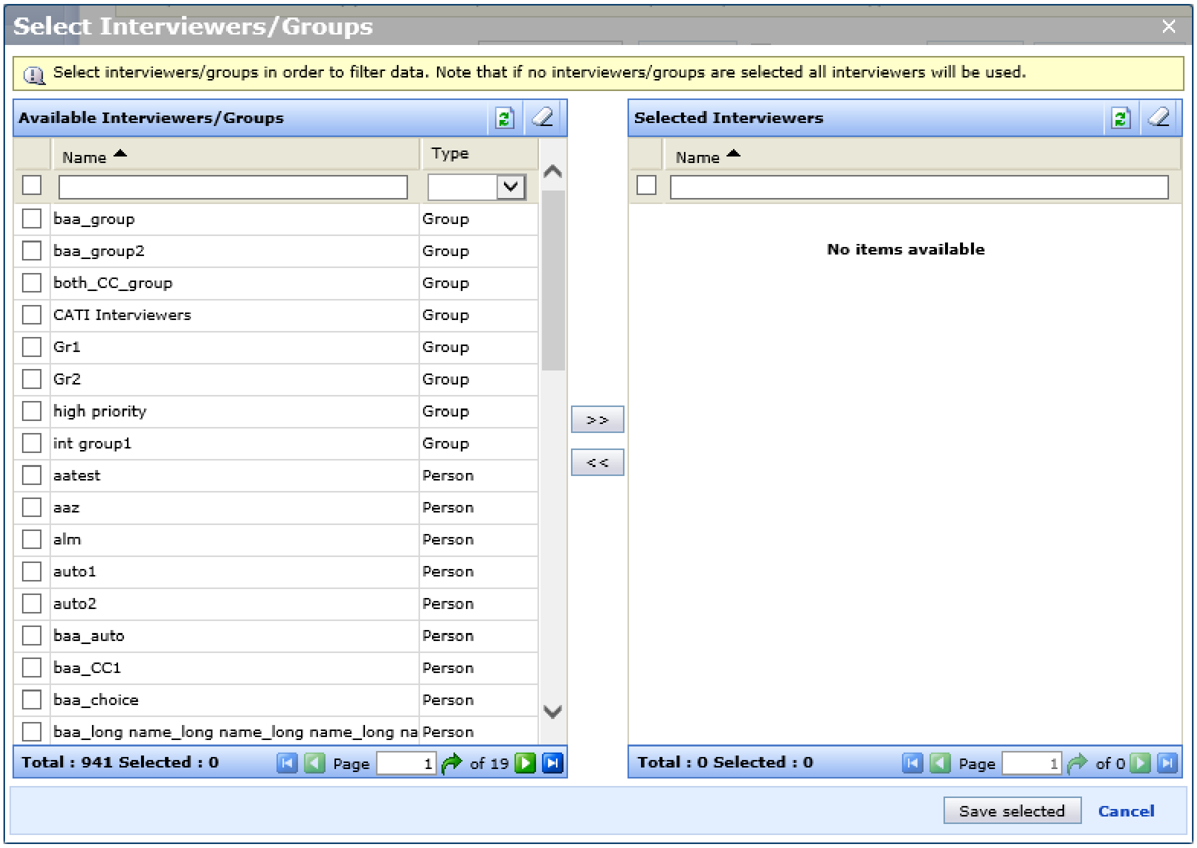


Figure 339 Selecting users to include into the Survey Overview Report

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.

Press 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 press the left arrow.

Press the Save selected button in this dialog window when you are done selecting to save this setting.

10. 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 (please 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.

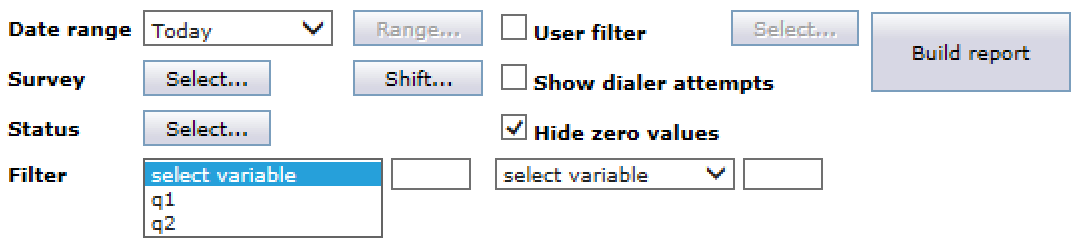


Figure 340 Choosing a variable to filter the Survey Overview report data

11. Press the Build Report button to generate the Survey Overview Report.

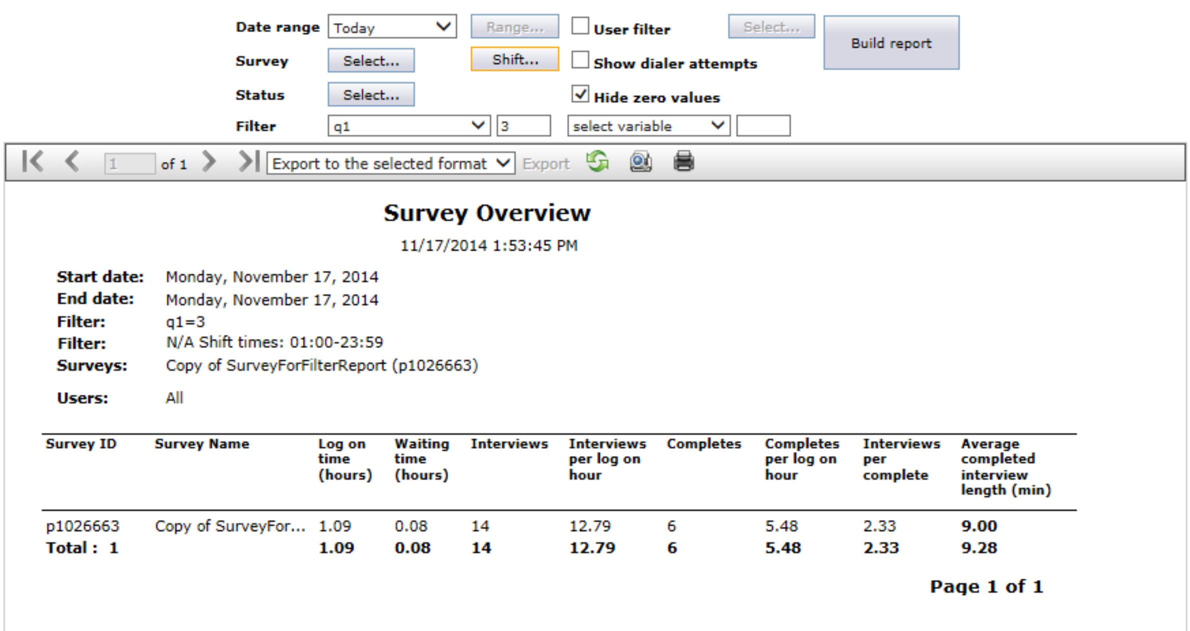


Figure 341 The generated Survey Overview Report

12. The Survey Overview report provides the following information:

Survey ID This is the ID of the Confirmit project

Survey name This is the name of the Confirmit project

Log on time This is the total time (in hours) spent logged into the system during the date range selected

Waiting 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 assignment mode counting starts after a survey is selected, in the manual mode counting starts after the first interview is selected.
Interviews	This is the number of interviews conducted during the selected date range
Interviews per log on hour	This is the number of interviews conducted for this survey per log on hour during the selected date range
Completes	This is the count of interviews that are selected as in the status filter and considered as completes (based on the status filter) during the selected date range
Completes per log on hour	This is the number of interviews with the complete status conducted for this survey per log on hour for the selected date range
Interviews per complete	This is the number of interviews conducted per completed interview
Average completed interview length (min)	This is the average time (in minutes) for a completed interview

13. 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.

    Press the Previous button to jump one page back, press 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 press 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.

14. You can refresh the generated report if the data updates. Press the Refresh button to do it.
15. The generated report can be exported and printed out – refer to Exporting the generated report on page 416 and Printing out the generated report on page 416 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 the Reports object tab in the left Navigation frame.
2. Double-click the Survey Productivity Report item in the left Navigation frame, or double-click this report type in the list in the top right frame. You can also right-click the Survey Productivity Report item in the left Navigation frame and choose Show from the context menu that appears.

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 in the top right frame.

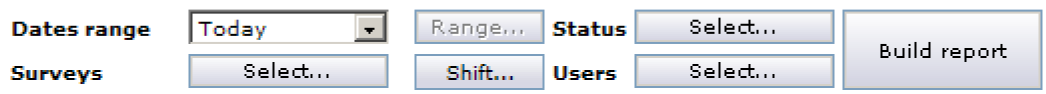


Figure 342 Configuring the Survey Productivity Report

This window interface lets you configure all the parameters required to generate the Productivity Report.

3. Select a single survey (or a number of surveys) for which it will be generated. Press the Select button to display the Select Surveys dialog window (see description of this form here - Selecting surveys to display in the grid in the Survey List activity view on page 291). Press Save selected in this dialog window 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. Press the Range button to display the Date Range form.

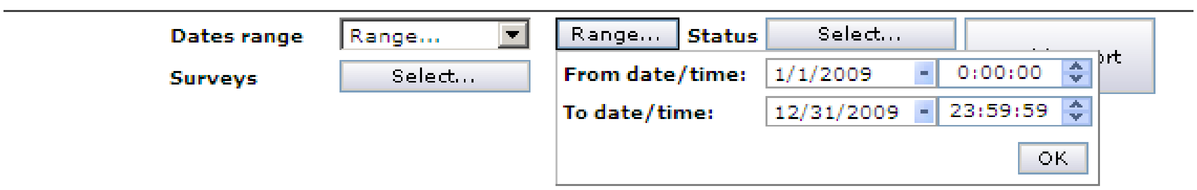


Figure 343 Choosing the date range for the Survey Productivity Report

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 press 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. Press 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. Press 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 press the Shift button, the Select Shift modal window is displayed (see the picture below).

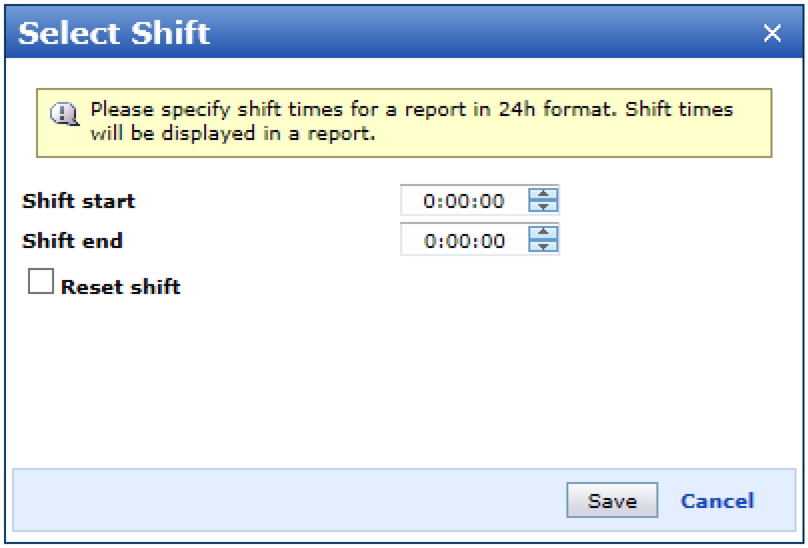


Figure 344 Choosing the Shift start and end times

Choose the desired start and end times of the shift using corresponding spin controls.

Press 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 press the Shift button and check the Reset shift box in the modal dialog window. Then you should press 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.

6. Status field allows selecting interview Extended Statuses. Interviews with the selected status will be included in the report. Press the Select button and check the required statuses in the scrollable list that appears. Press OK below this list to confirm this setting.

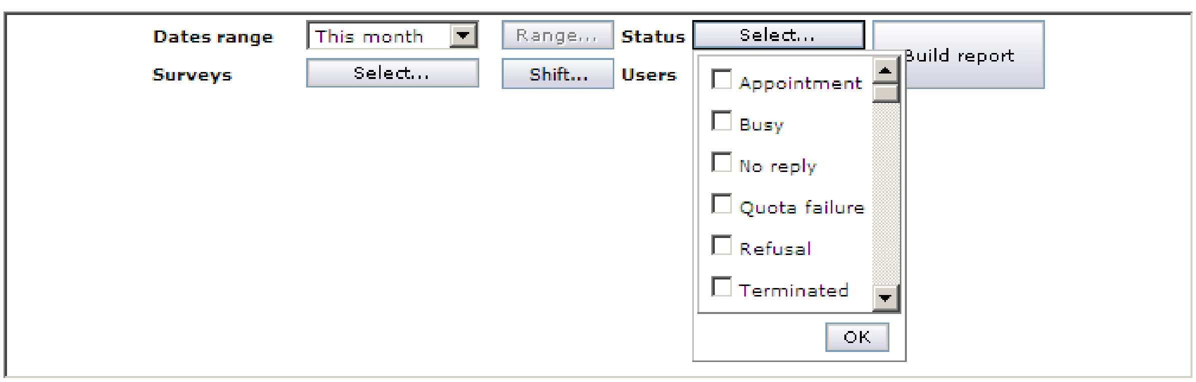


Figure 345 Selecting extended statuses to include into the Survey Productivity Report

7. When no interviewers are selected the report is generated for all interviewers working for the current company. You can select Interviewers (persons) or Interview Groups for whom this report will be generated. Press the Select... button for Users to display the Select Interviewers/Groups dialog window.

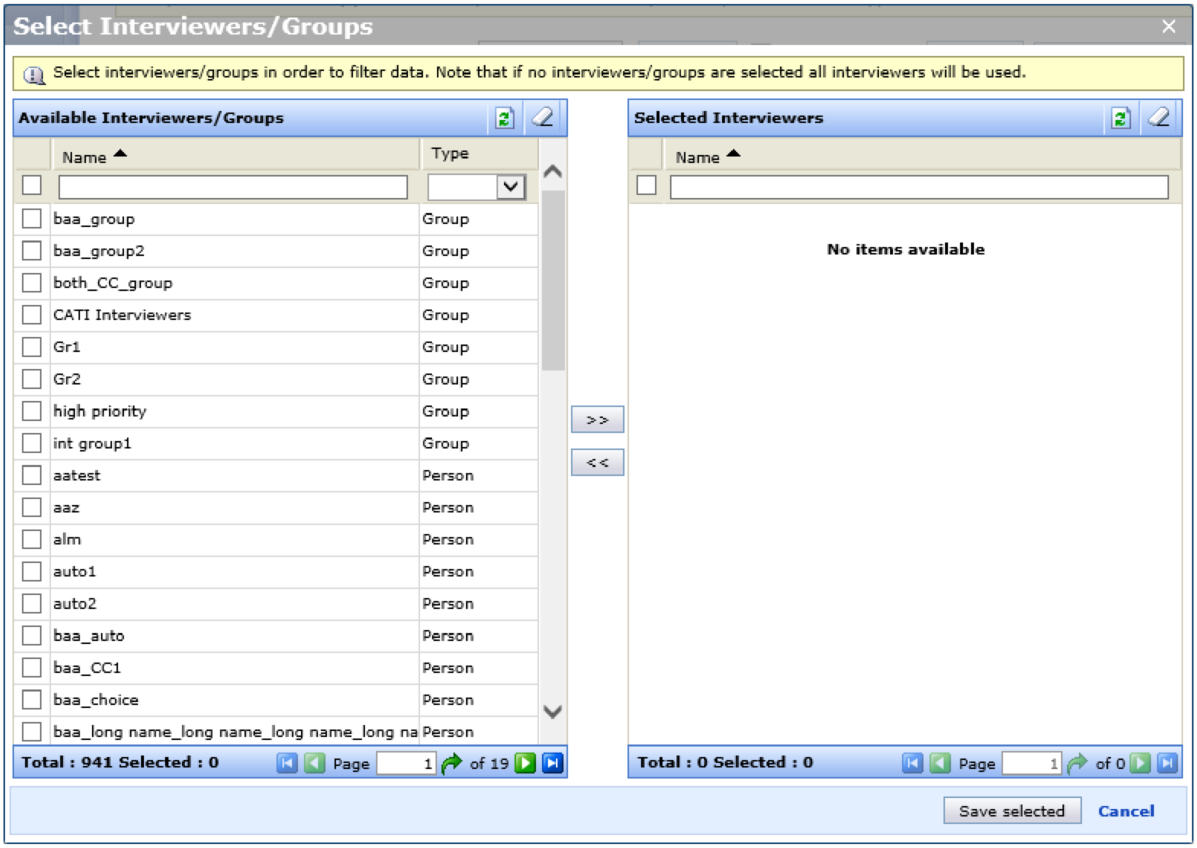


Figure 346 Selecting users to include into the Survey Productivity Report

This dialog window is described in Selecting interviewers or interviewer groups on page 377. Press Save selected in this dialog window to save this setting.

8. You can filter the report contents by a survey variable of your choice.

   Note that only variables that have the property "Available as CATI filter" set in Confirmit Authoring module become available and can be applied using the variable filter (please 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.

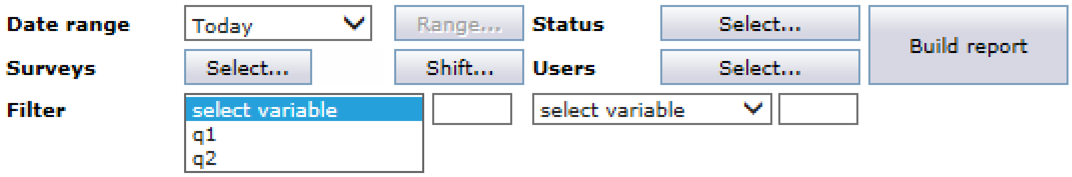


Figure 347 Choosing a variable to filter the Survey Productivity report data

9. Press the Build Report button to generate the Survey Productivity Report.

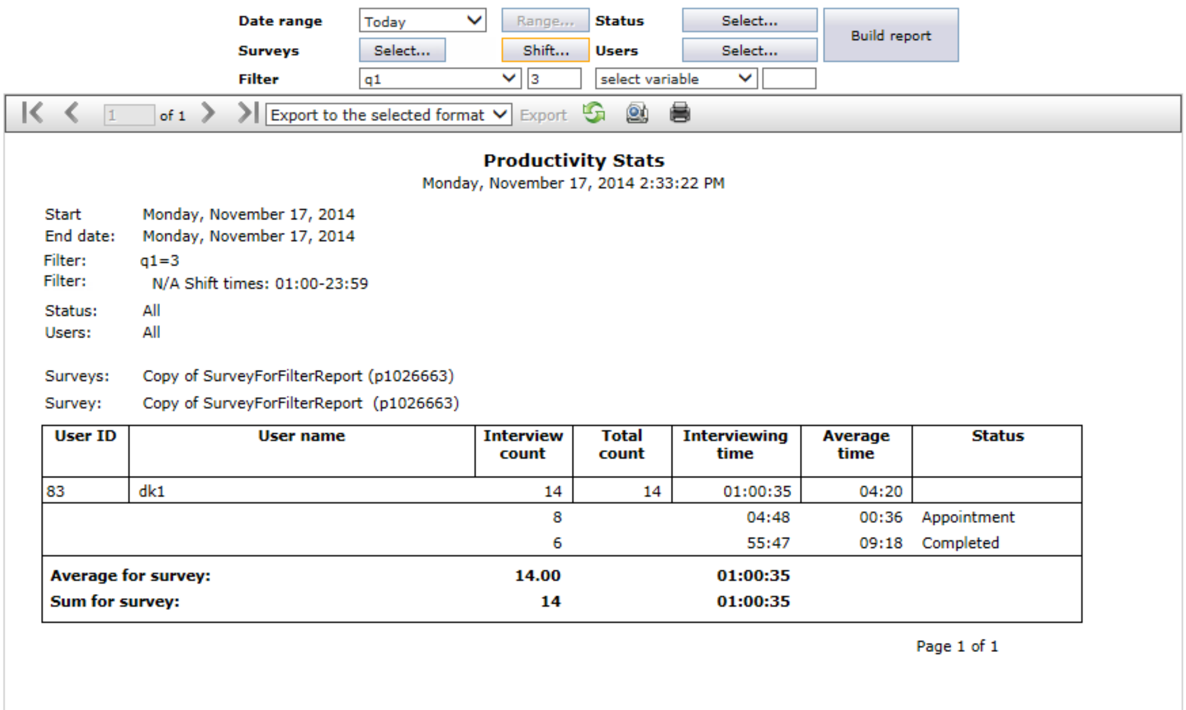


Figure 348 The generated Survey Productivity Report

10. In case the generated report is large enough and occupies more than one page you can navigate through its pages using the browsing controls displayed above the report header.

    If the current report page does not fit into the application window it can be scrolled with the help of the scroll bar displayed on the right side of the frame.

    Press the Previous button  to jump one page back, press 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 press the Go to First page button  and choose to jump to the first report page, or choose the Go to Last page button  to jump to the last report page.

11. You can refresh the generated report if the data updates. Press the Refresh button to do it.
12. The generated report can be exported and printed out – refer to Exporting the generated report on page 416 and Printing out the generated report on page 416 for instructions.

9.3 Generating the Interviewer Productivity Report

The Interviewer Productivity Report provides statistics regarding the work of the selected interviewers.

To generate the Interviewer Productivity Report:

1. Choose the Reports object tab in the left Navigation frame.
2. Double-click the Interviewer Productivity Report item in the left Navigation frame,or double-click this report type in the list in the top right frame. You can also right-click the Interviewer Productivity Report item in the left Navigation frame and choose Show from the context menu that appears.

   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 in the top right frame (in the separate window if you run the command from the Surveys list).

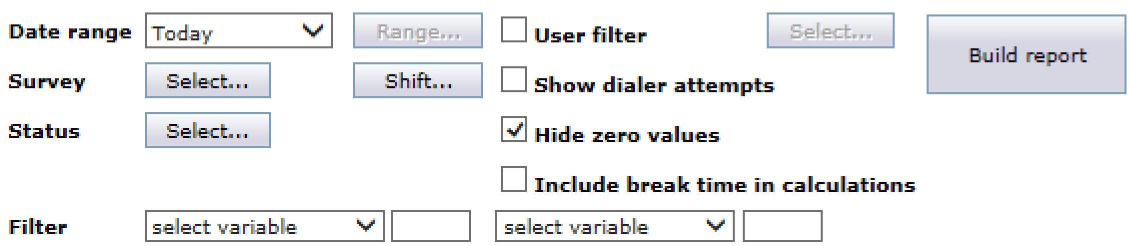


Figure 349 Configuring the Interviewer Productivity Report

   This interface lets you configure all the parameters required to generate the Interviewer Productivity Report.

3. Select a single survey (or a number of surveys) for which it will be generated. Press the Select button to display the Select Surveys dialog window (see description of this form here - Selecting surveys to display in the grid in the Survey List activity view on page 291). Press Save selected in this dialog window 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. Press the Range button to display the Date Range form.

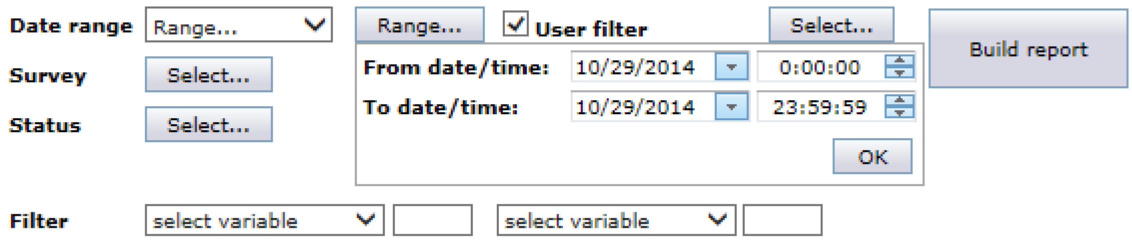


Figure 350 Choosing the date range for the Survey Overview Report

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 press 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. Press 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. Press 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 press the Shift button, the Select Shift modal window is displayed (see the picture below).

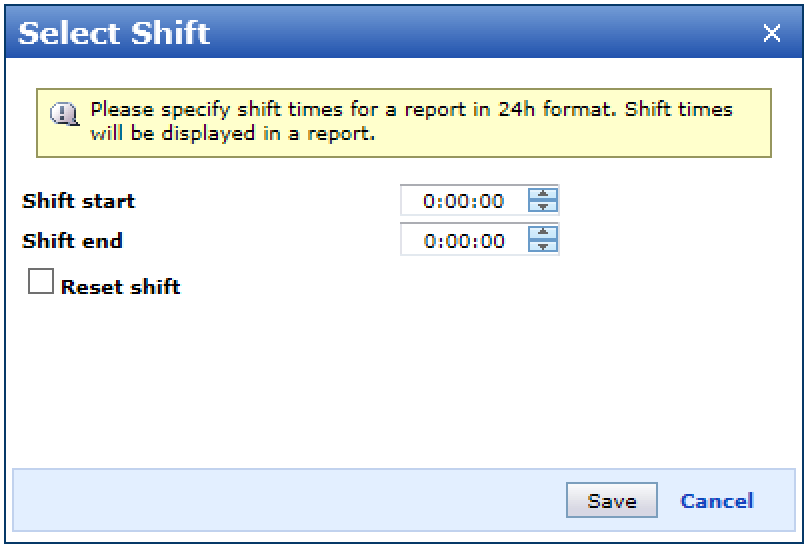


Figure 351 Choosing the Shift start and end times

Choose the desired start and end times of the shift using corresponding spin controls.

Press 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 press the Shift button and check the Reset shift box in the modal dialog window. Then you should press 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.

6. The Status field allows selecting interview Extended Statuses. Interviews with the selected status will be included as completes in the report. Press the Select button and check the required statuses in the scrollable list that appears. Press OK below this list to confirm this setting.

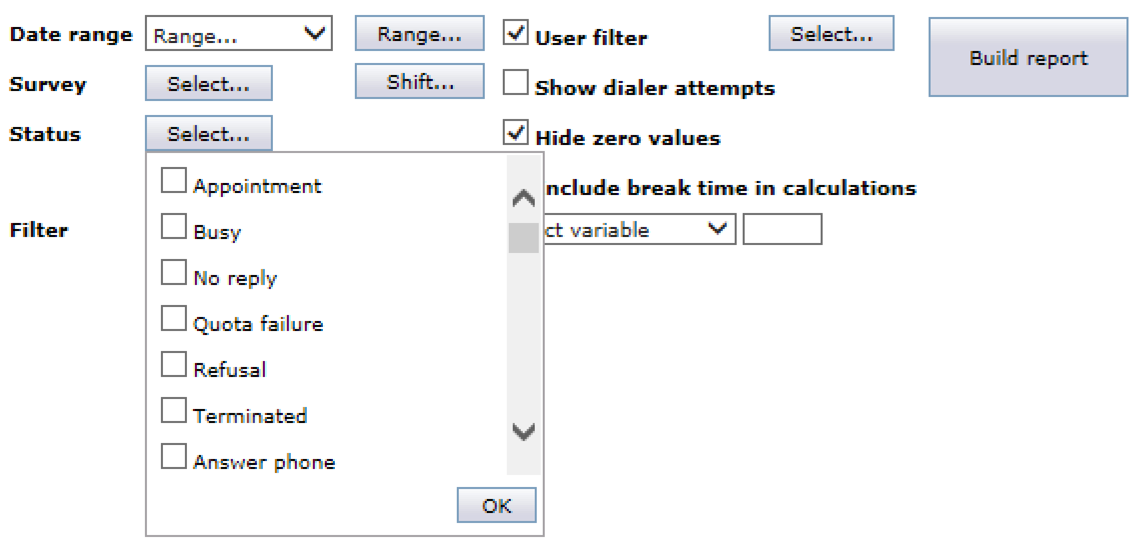


Figure 352 Selecting extended statuses to include into the Interviewer Productivity Report

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 (please 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.

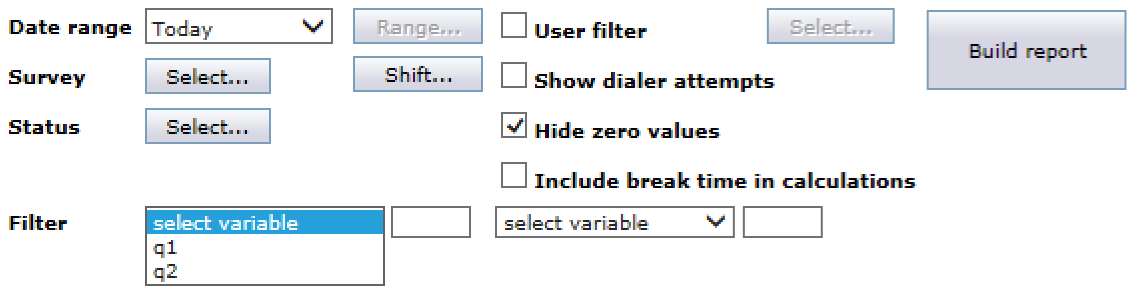


Figure 353 Choosing a variable to filter the Interviewer Productivity report data

8. When no interviewers are selected the report is generated for all interviewers working for the current company. You can select interviewers (users) for whom this report will be generated. Press the Select button for the User filter to display the Select Interviewers dialog window.

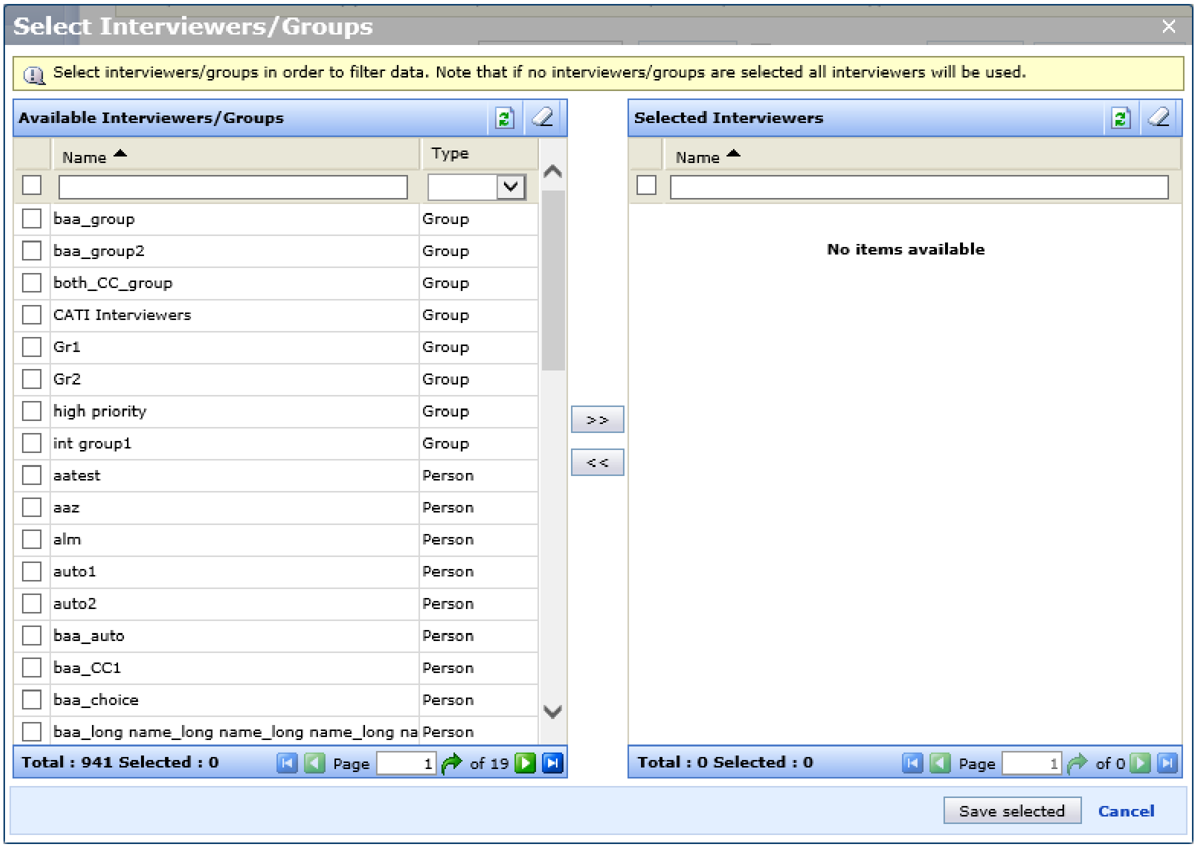


Figure 354 Selecting interviewers to include into the Interviewer Productivity Report

This dialog window is described in Selecting interviewers or interviewer groups on page 377. Press Save selected in this dialog window to save this setting.

9. 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 check the Show dialer attempts box.

10. You can also exclude all interviewers that had never logged in to work with the Interviewer Console during the period selected for the current report.

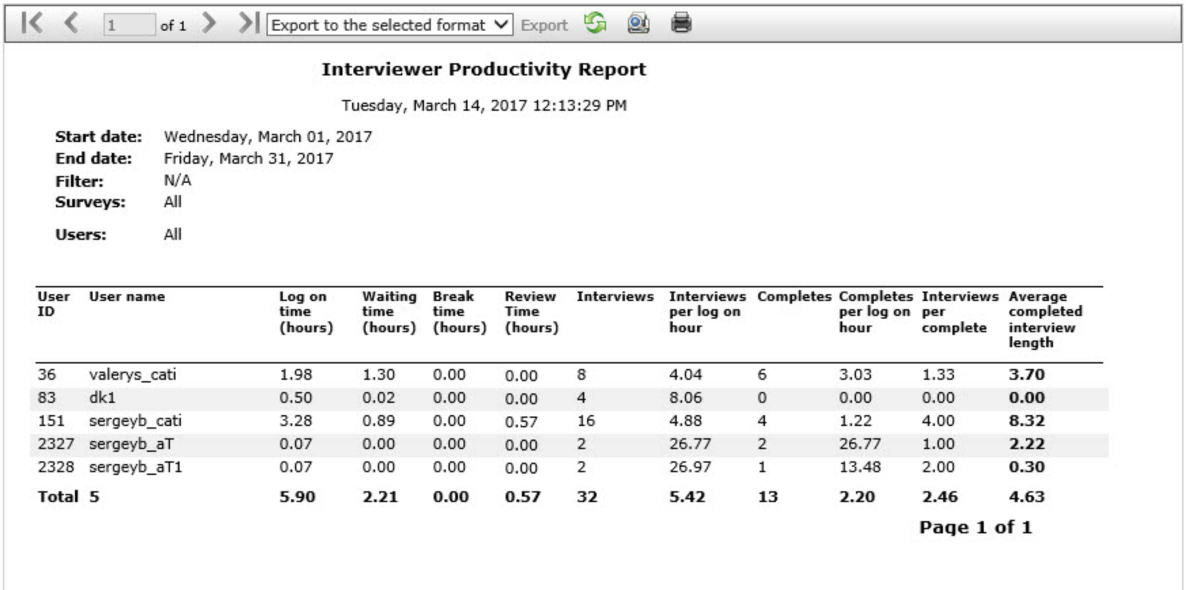
    To exclude such "inactive" interviewers you should check the Hide zero values box.

11. 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 - check the corresponding box. By default this option is disabled.

    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 won’t.

    You should also be aware that 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).

12. Press the Build Report button to generate the Interviewer Productivity Report.



Interviewer Productivity Report

Tuesday, March 14, 2017 12:13:29 PM

Start date: Wednesday, March 01, 2017
End date: Friday, March 31, 2017
Filter: N/A
Surveys: All
Users: All

User ID	User name	Log on time (hours)	Waiting time (hours)	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
36	valerys_cati	1.98	1.30	0.00	0.00	8	4.04	6	3.03	1.33	**3.70**
83	dk1	0.50	0.02	0.00	0.00	4	8.06	0	0.00	0.00	**0.00**
151	sergeyb_cati	3.28	0.89	0.00	0.57	16	4.88	4	1.22	4.00	**8.32**
2327	sergeyb_aT	0.07	0.00	0.00	0.00	2	26.77	2	26.77	1.00	**2.22**
2328	sergeyb_aT1	0.07	0.00	0.00	0.00	2	26.97	1	13.48	2.00	**0.30**
Total	**5**	**5.90**	**2.21**	**0.00**	**0.57**	**32**	**5.42**	**13**	**2.20**	**2.46**	**4.63**

Page 1 of 1

Figure 355 The generated Interviewer Productivity Report

13. The Interviewer Productivity Report provides the following information:

User ID	This is the ID of the CATI interviewer
User name	This is the login name for the CATI interviewer
Log on time (hours)	This is the total time (in hours) spent logged into the system during the date range selected
Waiting time (hours)	This is the total time (in hours) spent logged into the system waiting for the next interview to be delivered during the date range selected
Break time (hours)	This is the total time (in hours) spent on breaks during the date range selected
Review time (hours)	This is the time spent by the interviewer on reviewing openend questions
Interviews	These are the number of interviews worked on during the date range selected for the selected statuses
Interviews per log on hour	This is the number of interviews worked on for this survey per logged in hour for the date range specified
Completes	This is the count of interviews that are selected as in the status filter and considered as completes (based on the status filter and selected filter variable(s)) in the date range specified
Completes per log on hour	This is the number of interviews with the complete status worked on for this survey per logged in hour for the date range specified
Interviews per complete	This is the number of interviews worked on per completed interview
Average completed interview length (min)	This is the average time (in minutes) for a completed interview

14. 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.

    Press the Previous button  to jump one page back, press 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 press 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.

15. You can refresh the generated report if the data updates. Press the Refresh button to do it.
16. The generated report can be exported and printed out – refer to Exporting the generated report on page 416 and Printing out the generated report on page 416 for instructions.

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 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 please refer to Interviewer on a break on page 273.

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.

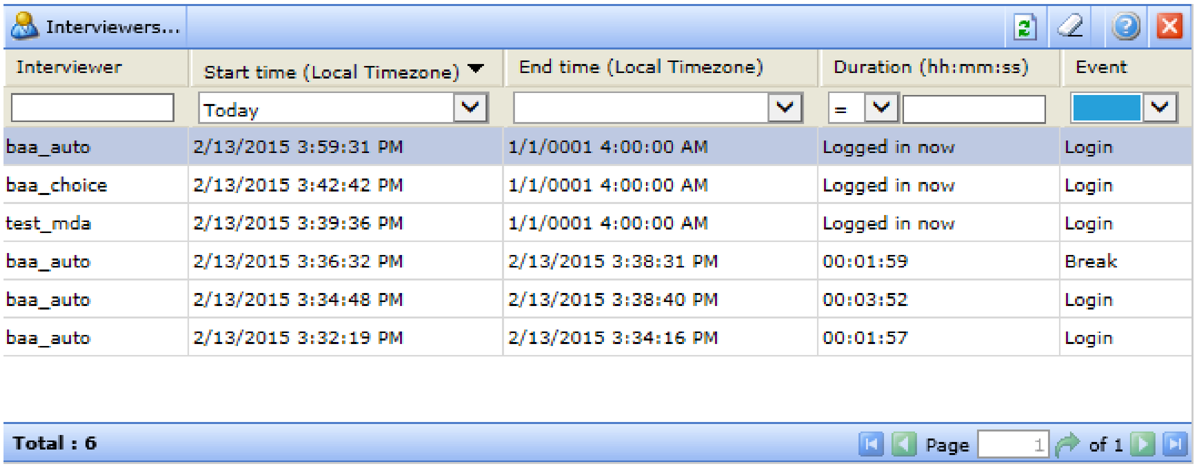
After the Interviewer Sessions report is generated and displayed, the supervisor can filter the report contents by any column shown in this report.

To generate the Interviewer Sessions report:

1. Choose the Reports object tab in the left Navigation frame.
2. Double-click the Interviewer Sessions item in the left Navigation frame, or double-click this report type in the list in the top right frame. You can also right-click the Interviewer Sessions item in the left Navigation frame and choose Show from the context menu that appears.

   This will display the Interviewer Sessions report in the right frame of 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.



Interviewer	Start time (Local Timezone)	End time (Local Timezone)	Duration (hh:mm:ss)	Event
	Today		=	
baa_auto	2/13/2015 3:59:31 PM	1/1/0001 4:00:00 AM	Logged in now	Login
baa_choice	2/13/2015 3:42:42 PM	1/1/0001 4:00:00 AM	Logged in now	Login
test_mda	2/13/2015 3:39:36 PM	1/1/0001 4:00:00 AM	Logged in now	Login
baa_auto	2/13/2015 3:36:32 PM	2/13/2015 3:38:31 PM	00:01:59	Break
baa_auto	2/13/2015 3:34:48 PM	2/13/2015 3:38:40 PM	00:03:52	Login
baa_auto	2/13/2015 3:32:19 PM	2/13/2015 3:34:16 PM	00:01:57	Login

Figure 356 Interviewer Sessions report generated for the current month

3. When no interviewers are selected the report is generated for all interviewers working for the current company.

   You can choose to generate the report for selected interviewers only.

   To select interviewers press the Interviewers button Interviewers... on the frame toolbar. This will display the Select Interviewers/Groups dialog window.

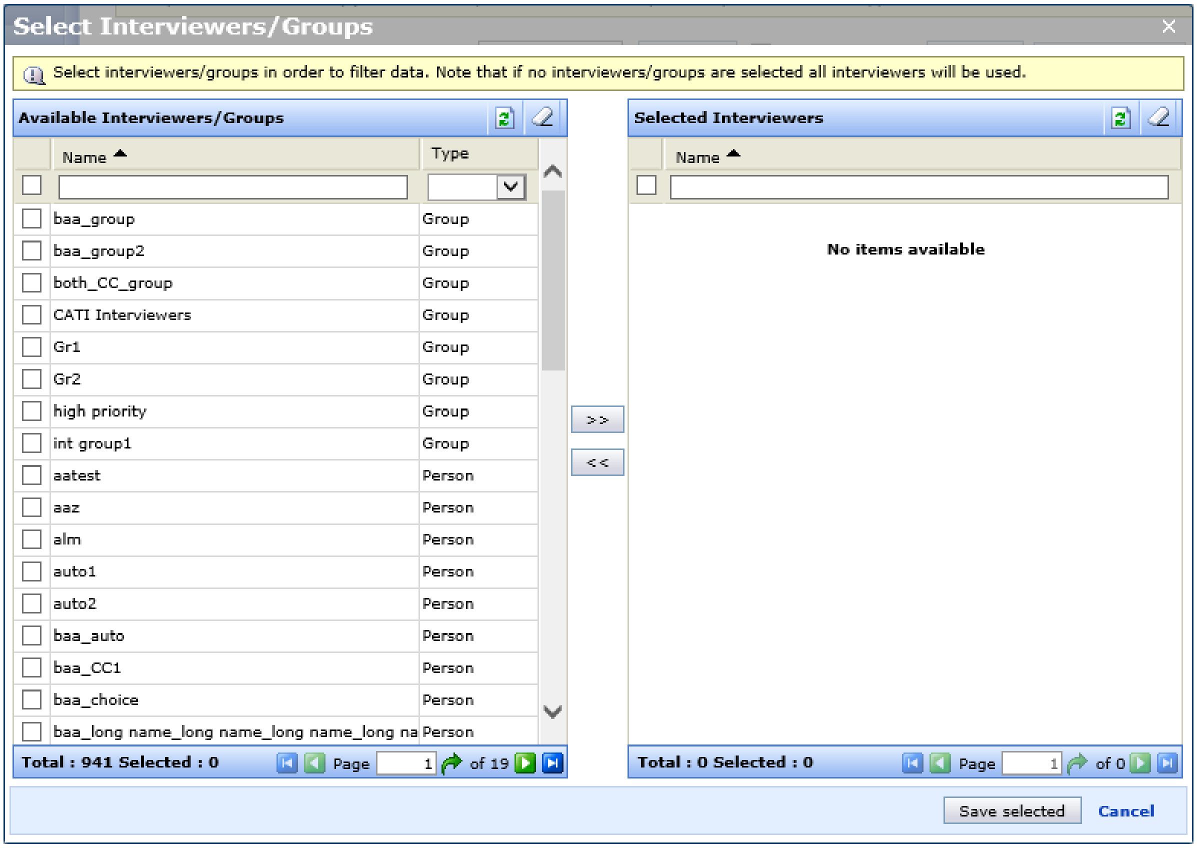


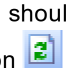
Figure 357 Selecting interviewers to include in the Interviewer Sessions report

This dialog window is described in Selecting interviewers or interviewer groups on page 377. Press Save selected in this dialog window to save this setting.

4. You can generate a report including 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.

5. 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.

6. 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 press the Refresh button every time you change value of any filter to update the report contents.

7. 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 instantly when the button is pressed - the frame contents are refreshed and the report is updated.

Comments concerning this topic? Send an email

9.5 Generating the Quota Progress Report

The Quota Progress Report provides statistics concerning quota achieved results for the selected surveys.

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 the Reports tab in the left Navigation frame.
2. Choose the Quota Progress item in the left Navigation frame, or double-click this report type in the list in the top right frame.

   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 in the top right frame (in the separate window if you run the command from the Surveys list).

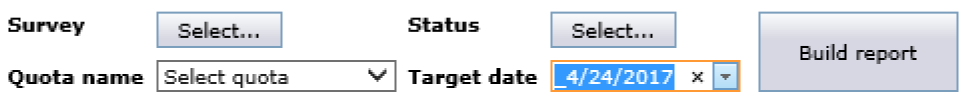
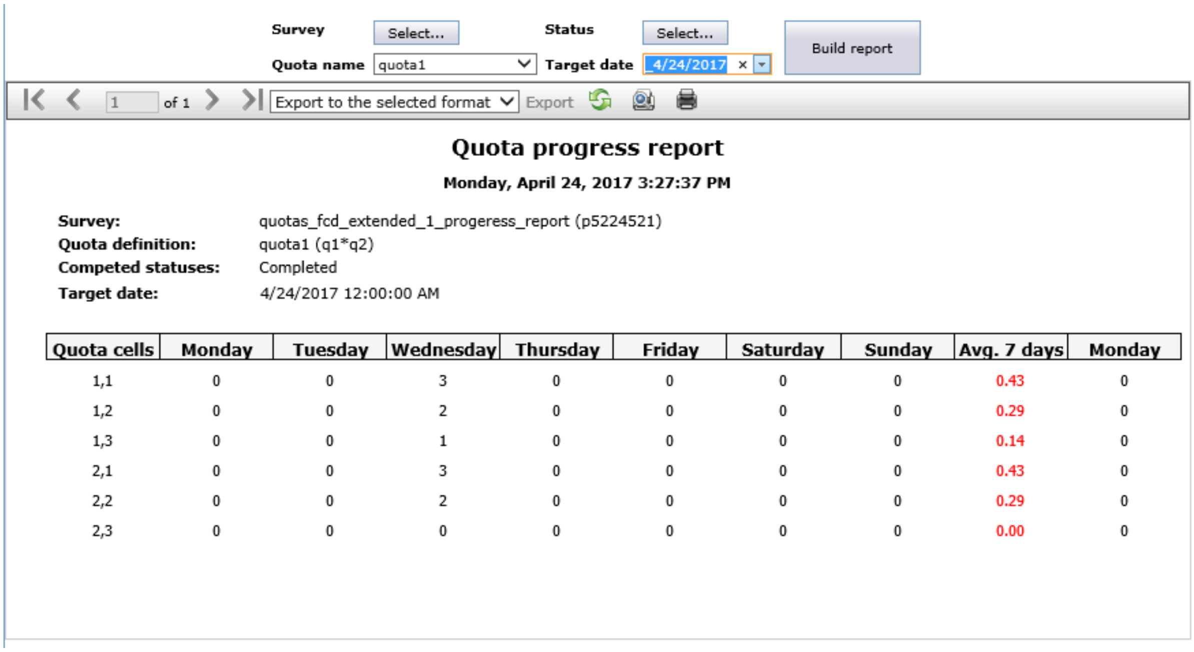


Figure 358 The Quota Progress report settings

3. Select a single survey (or a number of surveys) for which the report will be generated. Press the Select button (Survey) to display the Select Surveys dialog window (see description of this form here - The Select Surveys window on page 292). Press Save selected in this dialog window to save this setting.
4. 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.
5. 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.
6. 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.

   Press the "Status/Select" button to select statuses.
7. Press 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

Monday, April 24, 2017 3:27:37 PM

Survey: quotas_fcd_extended_1_progeress_report (p5224521)
Quota definition: quota1 (q1*q2)
Competed statuses: Completed
Target date: 4/24/2017 12:00:00 AM

Quota cells	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday	Sunday	Avg. 7 days	Monday
1,1	0	0	3	0	0	0	0	0.43	0
1,2	0	0	2	0	0	0	0	0.29	0
1,3	0	0	1	0	0	0	0	0.14	0
2,1	0	0	3	0	0	0	0	0.43	0
2,2	0	0	2	0	0	0	0	0.29	0
2,3	0	0	0	0	0	0	0	0.00	0

Figure 359

8. 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.

   Press the Previous button to jump one page back, press 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 press 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.

9. You can refresh the generated report if the data updates. Press the Refresh button to do it.

10. The generated report can be exported and printed out – refer to Exporting the generated report on page 416 and Printing out the generated report on page 416 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 the Reports object tab in the left Navigation frame.
2. Double-click the Sample Status Summary Report item in the left Navigation frame, or double-click this report type in the list in the top right frame. You can also right-click the Sample Status Summary Report item in the left Navigation frame and choose Show from the context menu that appears.

   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 Status Summary Report from the context menu that appears.

   This will display the Sample Status Summary Report settings in the top right frame (in the separate window if you run the command from the Surveys list).

Figure 360 Configuring the Sample Status Summary Report

This window interface lets you configure all the parameters required to generate the Sample Status Summary Report.

3. Select a single survey (or a number of surveys) for which it will be generated. Press the Select button to display the Select Surveys dialog window (see description of this form here - Selecting surveys to display in the grid in the Survey List activity view on page 291). Press OK in this dialog window to save this setting.
4. Next you can choose to apply the Status filter option. Check this box to activate the Select button. Press it to display the Status filter form.

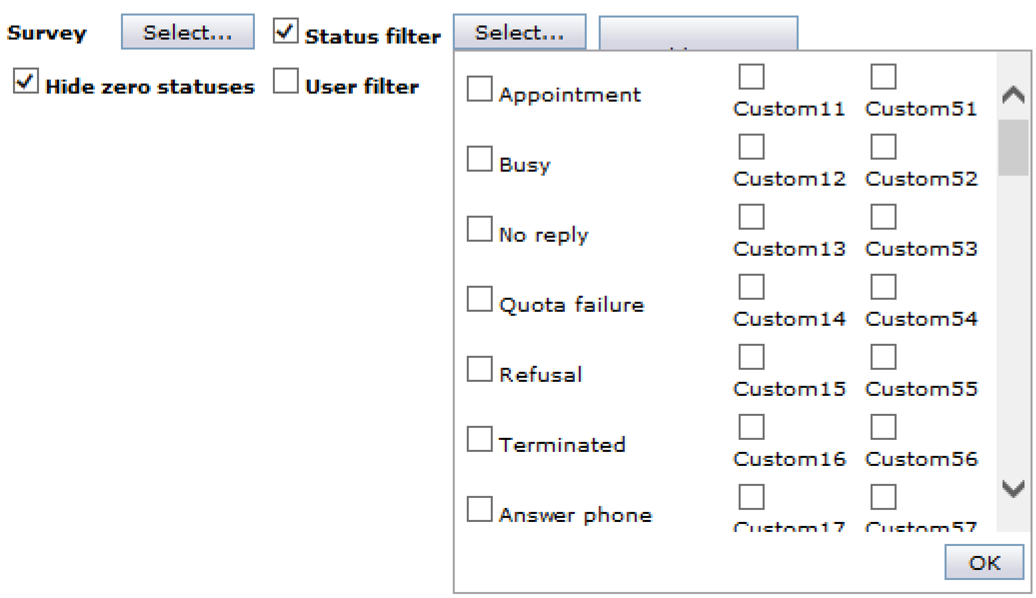


Figure 361 Applying extended status filter to the Sample Status Summary Report

Put a check in front of extended statuses you want to include in the Sample Status Summary Report. Press OK to save this setting.

5. 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.
6. Check the User filter option to select interviewers for inclusion into the Sample Status Summary Report.

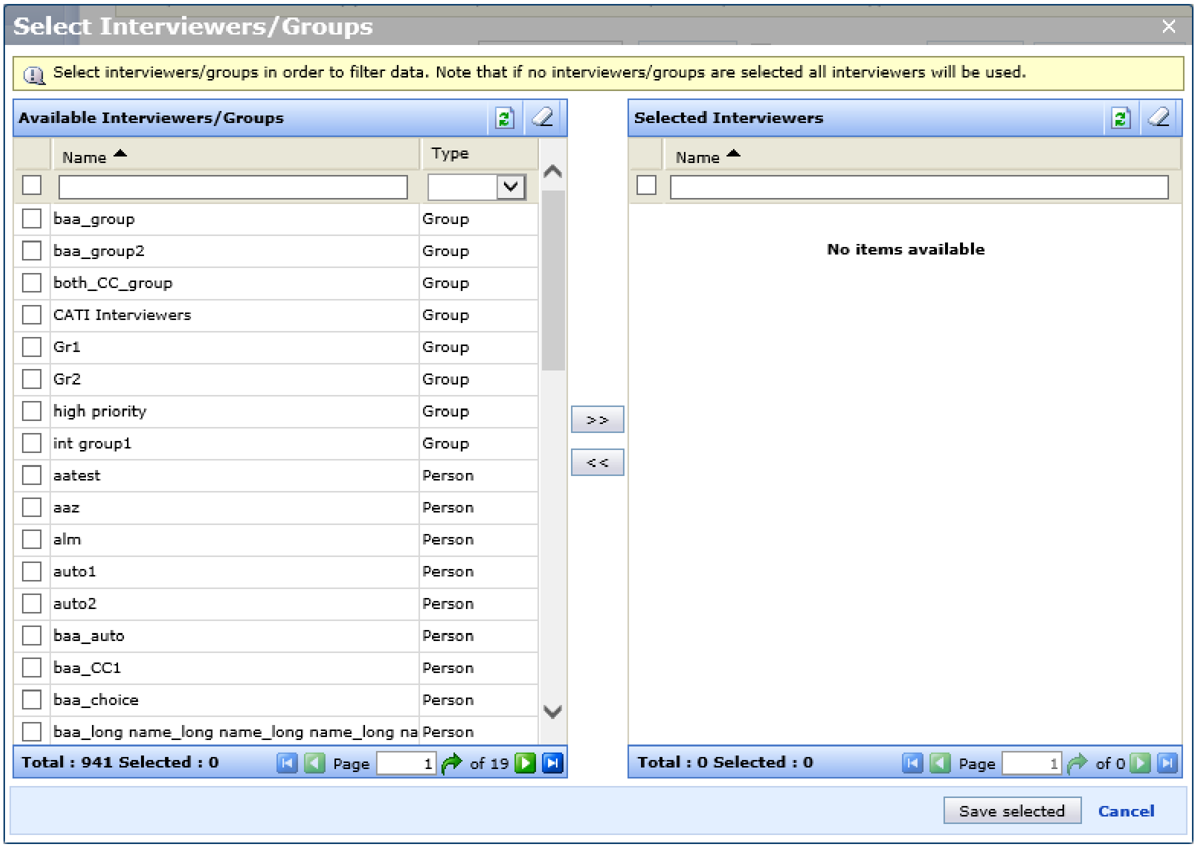


Figure 362 Applying the user filter to the Sample Status Summary Report

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 grid in the Survey List activity view on page 291 (also see step 3 above). Press Save selected in this dialog window to save this setting.

7. Press the Build Report button to generate the Sample Status Summary Report.

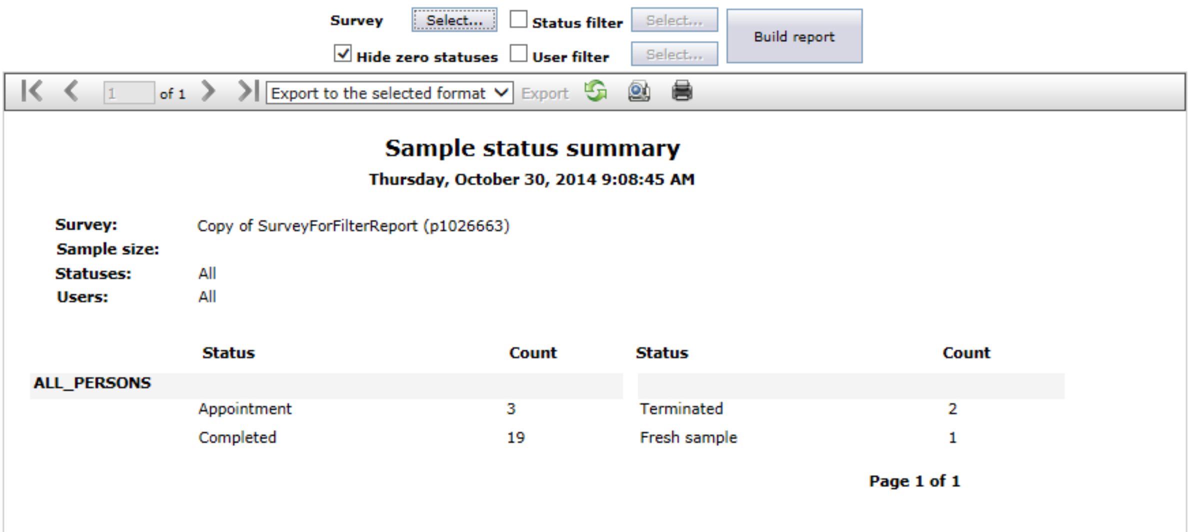


Figure 363 The generated Sample Status Summary Report

8. 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.

   Press the Previous button to jump one page back, press 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 press 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.

9. You can refresh the generated report if the data updates. Press the Refresh button to do it.

10. The generated report can be exported and printed out – refer to Exporting the generated report on page 416 and Printing out the generated report on page 416 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.

To generate the Sample Status Summary by Question Report :

1. Choose the Reports object tab in the left Navigation frame.
2. Double-click the Sample Status Summary by Question Report item in the left Navigation frame, or double-click this report type in the list in the top right frame. You can also right-click the Sample Status Summary by Question Report item in the left Navigation frame and choose Show from the context menu that appears.

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 Status Summary by Question Report from the context menu that appears.

This will display the report settings in the top right frame (in the separate window if you run the command from the Surveys list). On the first step you have to choose a survey. This is a single-survey report and only one survey can be chosen at a time. The system warns if you try to use more than one survey to generate the report.

Figure 364 Selecting a survey to build a Sample Status Summary by Question Report

3. Press the Select button to display the Select Surveys dialog window (see description of this form here - Selecting surveys to display in the grid in the Survey List activity view on page 291). Press 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).

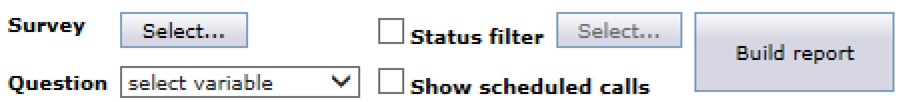


Figure 365 The complete Sample Status Summary by Question Report configuration set

4. Next you can choose to apply the Status filter option. Check this box to activate the Select button. Press it to display the Status filter form.

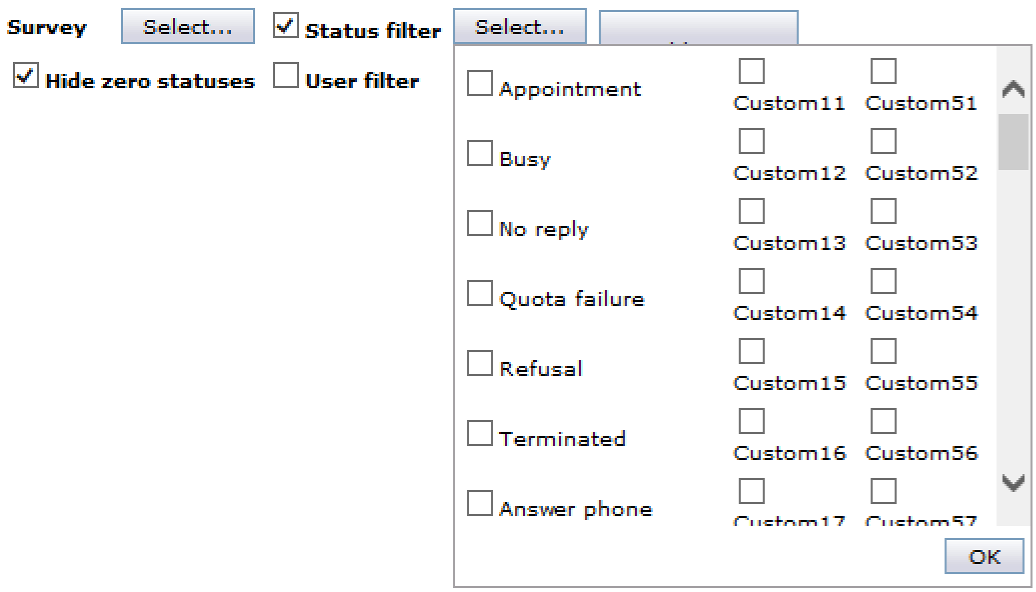


Figure 366 Applying extended status filter to the Sample Status Summary by Question Report

Put a check in front of extended statuses you want to include in the report. Press OK to save this setting.

5. Next you can start building the report. Press the Build Report button to generate the Sample Status Summary by Question Report.

   Additional report configuration options are available - they are described later on in this topic.

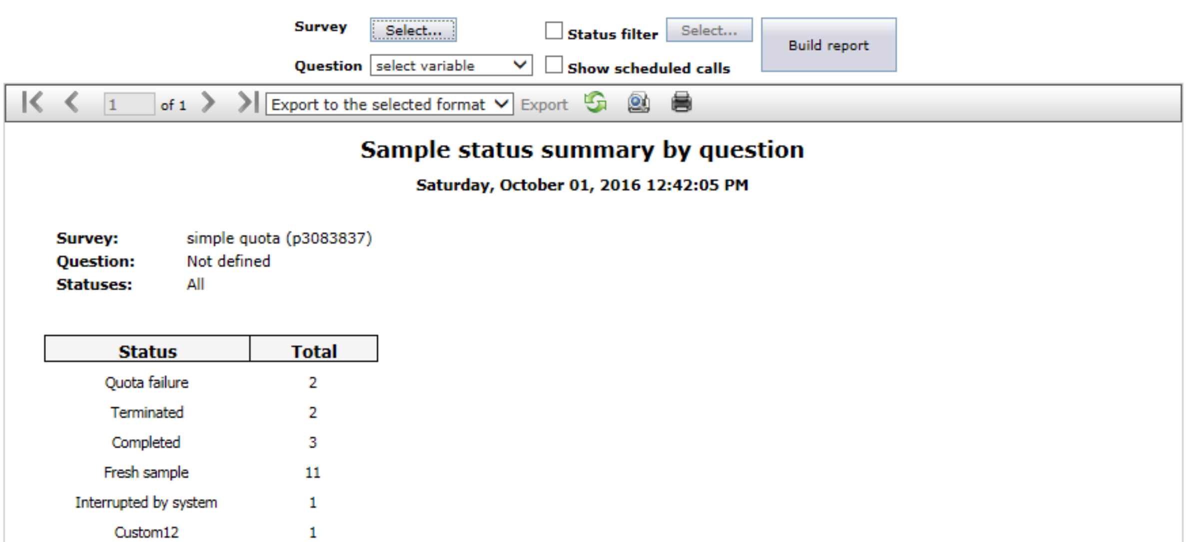


Figure 367 The generated Sample Status Summary by Question Report

6. It is possible to select a variable to be included in the report. The variable must be of ‘single’ type and also have the ‘Available as CATI filter’ setting enabled.

The inclusion of a variable will add new columns to the report showing how the status counts are broken down by each category in the question.

.

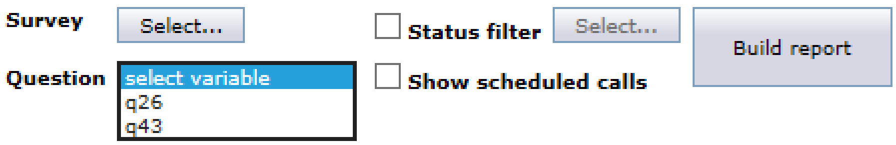
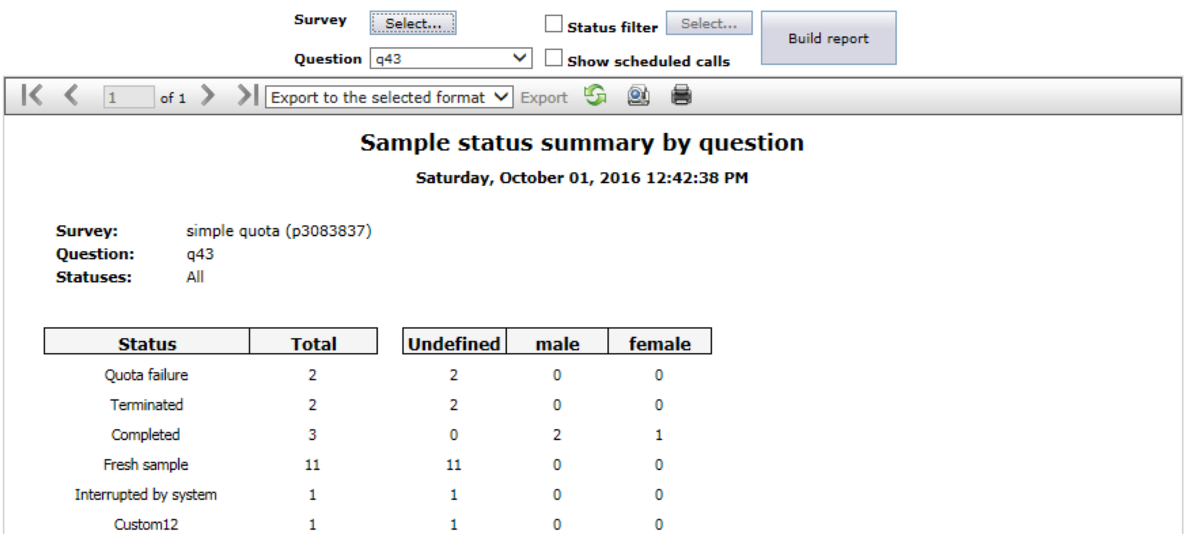


Figure 368 Selecting a variable to include into the Sample Status Summary by Question report

Press 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 369 The Sample Status Summary by Question Report generated for the selected question

7. 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).

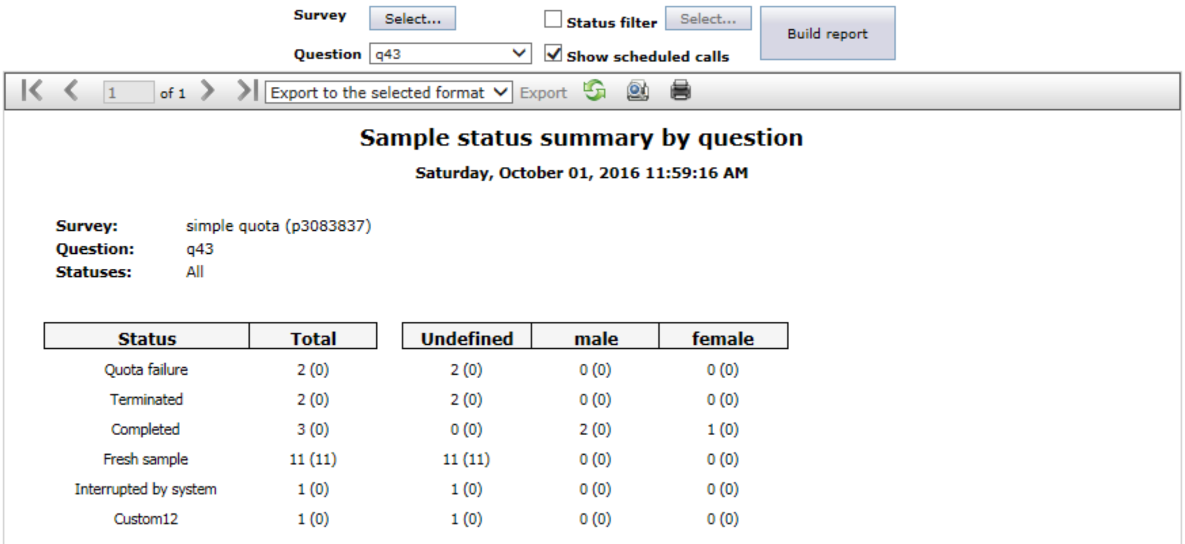


Figure 370 The Sample Status Summary by Question Report showing the amount of scheduled calls

8. 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.

   Press the Previous button to jump one page back, press 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 press 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.

9. You can refresh the generated report if the data updates. Press the Refresh button to do it.

10. The generated report can be exported and printed out – refer to Exporting the generated report on page 416 and Printing out the generated report on page 416 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 an abbreviation of ‘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 the Reports object tab in the left Navigation frame.
2. Double-click the Sample Utilization Report item in the left Navigation frame, or double-click this report type in the list in the top right frame. You can also right-click the Sample Utilization Report item in the left Navigation frame and choose Show from the context menu that appears.

   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 in the top right frame (or in a separate window if you run the command from the Surveys list).

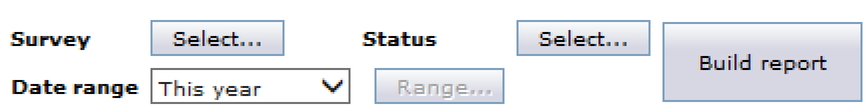


Figure 371 Configuring the Sample Utilization Report

   This window interface lets you configure all the parameters required to generate the Sample Status Summary Report.

3. Select a single survey (or a number of surveys) for which it will be generated. Press the Select button to display the Select Surveys dialog window (see description of this form here - Selecting surveys to display in the grid in the Survey List activity view on page 291). Press OK in this dialog window to save this setting.
4. Next you can choose to apply the Status filter option. Press the Select button to display the Status filter form.

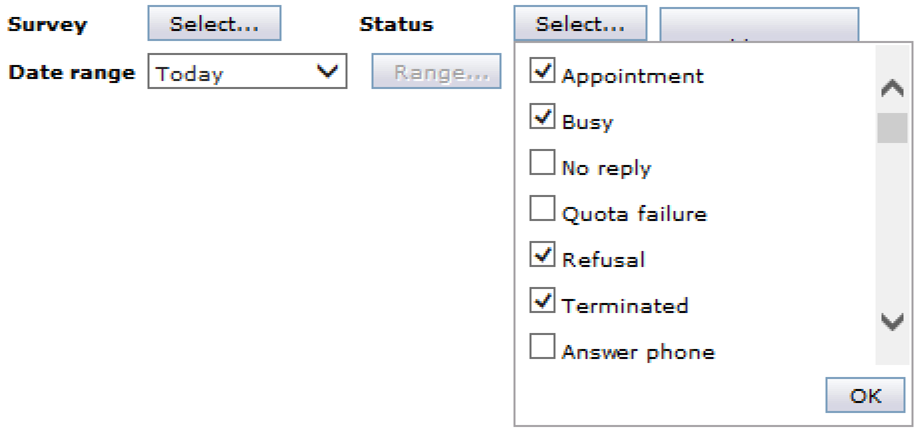


Figure 372 Applying extended status filter to the Sample Utilization Report

Put a check in front of extended statuses you want to include in the Sample Utilization Report. Press OK to save this setting.

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 (the "Range" item in the list) – in this case the Range button on the right of this field becomes available. Press the Range button to display the Date Range form.

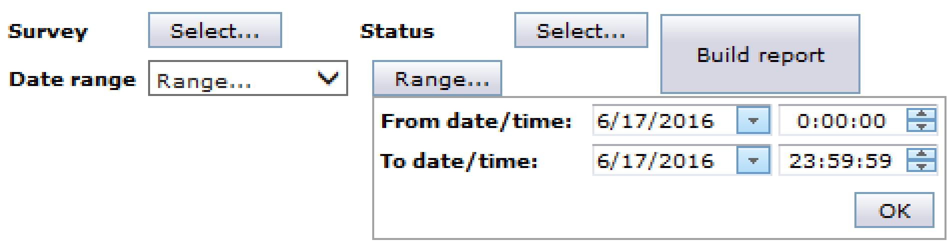
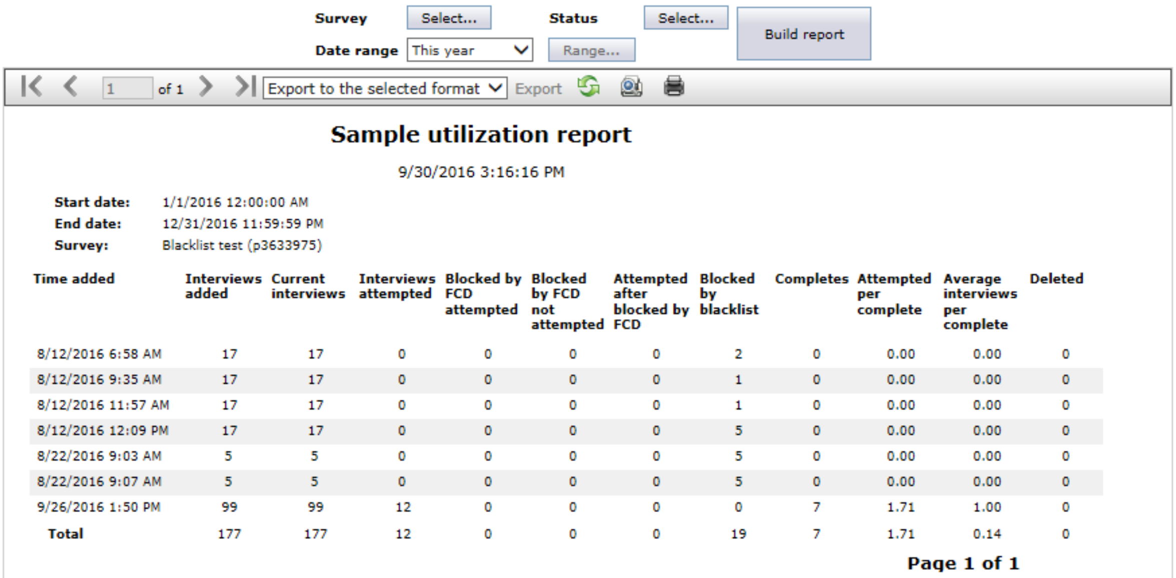


Figure 373 Adjusting the date range for the Sample Utilization Report

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 press 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. Press 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.

6. Press the Build Report button to generate the Sample Utilization Report.



Sample utilization report

9/30/2016 3:16:16 PM

Start date: 1/1/2016 12:00:00 AM
End date: 12/31/2016 11:59:59 PM
Survey: Blacklist test (p3633975)

Time added	Interviews added	Current interviews	Interviews attempted	Blocked by FCD attempted	Blocked by FCD not attempted	Attempted after blocked by FCD	Blocked by blacklist	Completes	Attempted per complete	Average interviews per complete	Deleted
8/12/2016 6:58 AM	17	17	0	0	0	0	2	0	0.00	0.00	0
8/12/2016 9:35 AM	17	17	0	0	0	0	1	0	0.00	0.00	0
8/12/2016 11:57 AM	17	17	0	0	0	0	1	0	0.00	0.00	0
8/12/2016 12:09 PM	17	17	0	0	0	0	5	0	0.00	0.00	0
8/22/2016 9:03 AM	5	5	0	0	0	0	5	0	0.00	0.00	0
8/22/2016 9:07 AM	5	5	0	0	0	0	5	0	0.00	0.00	0
9/26/2016 1:50 PM	99	99	12	0	0	0	0	7	1.71	1.00	0
Total	177	177	12	0	0	0	19	7	1.71	0.14	0

Page 1 of 1

Figure 374 The generated Sample Utilization 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.

   Press the Previous button to jump one page back, press 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 press 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. Press the Refresh button to do it.
9. The generated report can be exported and printed out – refer to Exporting the generated report on page 416 and Printing out the generated report on page 416 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, supervisor can filter the report contents by any column shown in this report (except for the Duration, which can only be used for sorting).

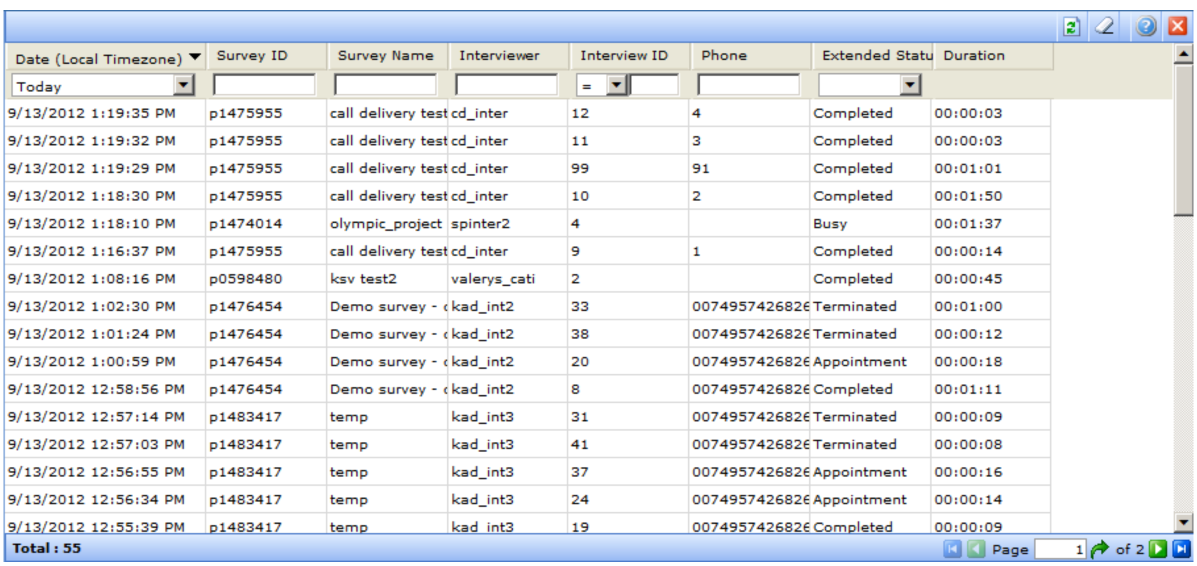
The Call attempts report can be generated from the Reports tab for all surveys, or from the All Surveys list for a certain survey.

If a report is launched from the Reports tab it is opened in the CATI Supervisor's top right frame. If a report is launched from the All Surveys list it is opened in a new pop up window.

To generate the Call Attempts report for all surveys:

1. Choose the Reports object tab in the left Navigation frame.
2. Double-click the Call Attempts item in the left Navigation frame, or double-click this report type in the list in the top right frame. You can also right-click the Call Attempts item in the left Navigation frame and choose Show from the context menu that appears.

   This will display the Call Attempts report in the top right frame of the CATI Supervisor window.



Date (Local Timezone)	Survey ID	Survey Name	Interviewer	Interview ID	Phone	Extended Statu	Duration
Today				=			
9/13/2012 1:19:35 PM	p1475955	call delivery test	cd_inter	12	4	Completed	00:00:03
9/13/2012 1:19:32 PM	p1475955	call delivery test	cd_inter	11	3	Completed	00:00:03
9/13/2012 1:19:29 PM	p1475955	call delivery test	cd_inter	99	91	Completed	00:01:01
9/13/2012 1:18:30 PM	p1475955	call delivery test	cd_inter	10	2	Completed	00:01:50
9/13/2012 1:18:10 PM	p1474014	olympic_project	spinter2	4		Busy	00:01:37
9/13/2012 1:16:37 PM	p1475955	call delivery test	cd_inter	9	1	Completed	00:00:14
9/13/2012 1:08:16 PM	p0598480	ksv test2	valerys_cati	2		Completed	00:00:45
9/13/2012 1:02:30 PM	p1476454	Demo survey - (	kad_int2	33	0074957426826	Terminated	00:01:00
9/13/2012 1:01:24 PM	p1476454	Demo survey - (	kad_int2	38	0074957426826	Terminated	00:00:12
9/13/2012 1:00:59 PM	p1476454	Demo survey - (	kad_int2	20	0074957426826	Appointment	00:00:18
9/13/2012 12:58:56 PM	p1476454	Demo survey - (	kad_int2	8	0074957426826	Completed	00:01:11
9/13/2012 12:57:14 PM	p1483417	temp	kad_int3	31	0074957426826	Terminated	00:00:09
9/13/2012 12:57:03 PM	p1483417	temp	kad_int3	41	0074957426826	Terminated	00:00:08
9/13/2012 12:56:55 PM	p1483417	temp	kad_int3	37	0074957426826	Appointment	00:00:16
9/13/2012 12:56:34 PM	p1483417	temp	kad_int3	24	0074957426826	Appointment	00:00:14
9/13/2012 12:55:39 PM	p1483417	temp	kad_int3	19	0074957426826	Completed	00:00:09

Total : 55 Page 1 of 2

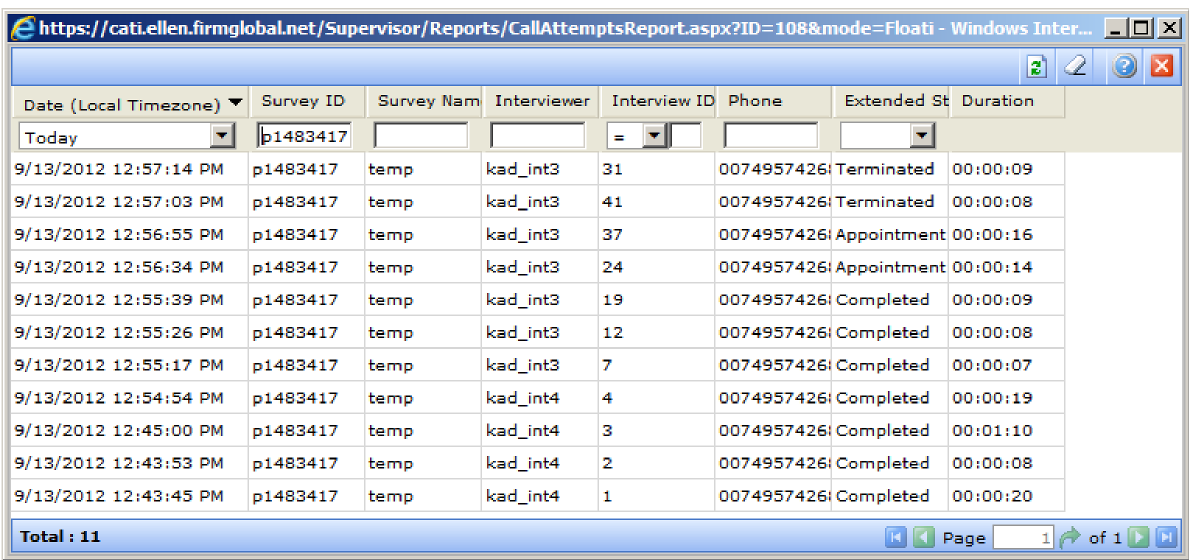
Figure 375 Call Attempts report displayed in the top right frame of the CATI Supervisor window

3. You may want to update the report - press the Refresh button in the top right corner of the frame to do it.
4. 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 press the Refresh button to update the report (or press Enter after all required filters are set).
5. 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.
6. 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.



https://cati.ellen.firmglobal.net/Supervisor/Reports/CallAttemptsReport.aspx?ID=108&mode=Floati - Windows Inter...

Date (Local Timezone)	Survey ID	Survey Nam	Interviewer	Interview ID	Phone	Extended St	Duration
Today	p1483417			=			
9/13/2012 12:57:14 PM	p1483417	temp	kad_int3	31	0074957426	Terminated	00:00:09
9/13/2012 12:57:03 PM	p1483417	temp	kad_int3	41	0074957426	Terminated	00:00:08
9/13/2012 12:56:55 PM	p1483417	temp	kad_int3	37	0074957426	Appointment	00:00:16
9/13/2012 12:56:34 PM	p1483417	temp	kad_int3	24	0074957426	Appointment	00:00:14
9/13/2012 12:55:39 PM	p1483417	temp	kad_int3	19	0074957426	Completed	00:00:09
9/13/2012 12:55:26 PM	p1483417	temp	kad_int3	12	0074957426	Completed	00:00:08
9/13/2012 12:55:17 PM	p1483417	temp	kad_int3	7	0074957426	Completed	00:00:07
9/13/2012 12:54:54 PM	p1483417	temp	kad_int4	4	0074957426	Completed	00:00:19
9/13/2012 12:45:00 PM	p1483417	temp	kad_int4	3	0074957426	Completed	00:01:10
9/13/2012 12:43:53 PM	p1483417	temp	kad_int4	2	0074957426	Completed	00:00:08
9/13/2012 12:43:45 PM	p1483417	temp	kad_int4	1	0074957426	Completed	00:00:20

Total : 11 Page 1 of 1

Figure 376 Call Attempts report displayed in the separate window when generated from the All Surveys list

3. You may want to update the report - press the Refresh button in the top right corner of the frame to do it.
4. 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 press the Refresh button to update the report.
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.

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 the Reports object tab in the left Navigation frame.
2. Double-click the Attempts by Disposition Report item in the left Navigation frame, or double-click this report type in the list in the top right frame. You can also right-click the Attempts by Disposition Report item in the left Navigation frame and choose Show from the context menu that appears.

   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/Attempts by Disposition Report from the context menu that appears.

   This will display the Attempts by Disposition Report settings in the top right frame (in the separate window if you run the command from the Surveys list).

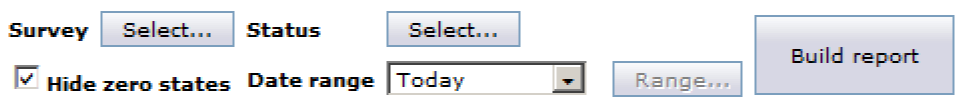


Figure 377 Configuring the Attempts by disposition Report

   This window interface lets you configure all the parameters required to generate the Attempts by disposition Report.

3. The Attempts by disposition Report allows selecting a survey for which it will generated. Press the Select button to display the Survey Search form (see description of this form here - Selecting surveys to display in the grid in the Survey List activity view on page 291). Only one survey can be selected (this type of report is generated for a single survey only). Press OK in the form to save this setting.

   The Survey Search form which is activated using the Select button does not contain the Find field. It only allows for applying 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. Press the Select button and check the required statuses in the scrollable list that appears. Press OK below this list to confirm this setting.

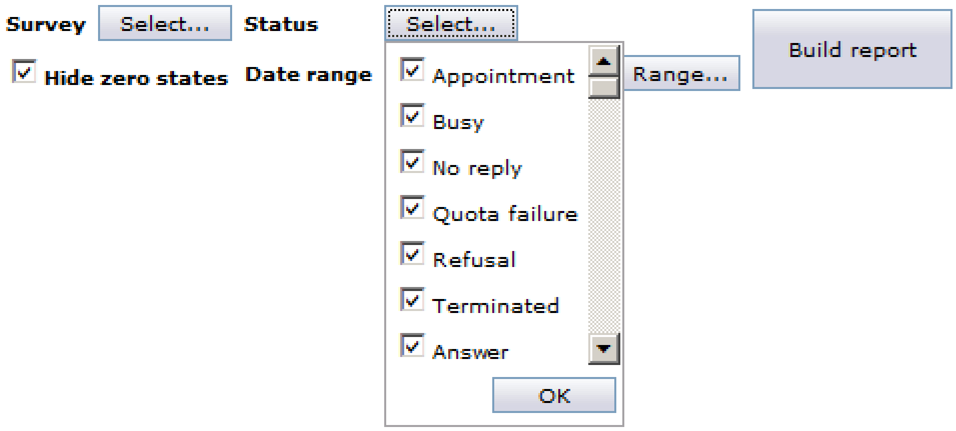


Figure 378 Selecting extended statuses to include into the Attempts by disposition Report

By default all extended statuses are included (all boxes are checked). Clear the boxes to exclude interviews with that status from the 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. Press the Range button to display the Date Range form.

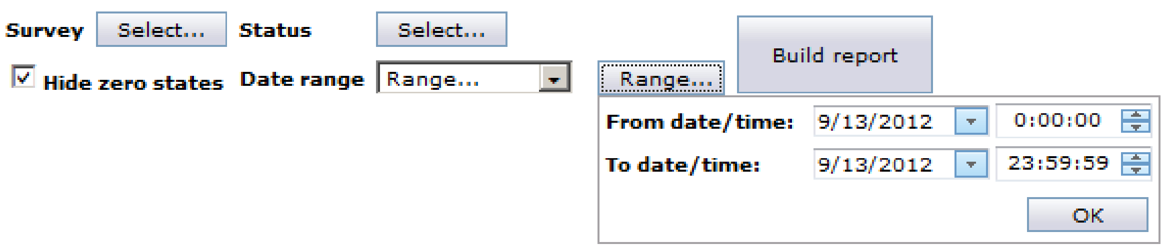


Figure 379 Choosing the date range for the Attempts by disposition Report

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 press 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. Press OK below this list to confirm this setting.

5. 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, and the report is perceived better.

   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. Press the Build Report button to generate the Attempts by disposition Report.

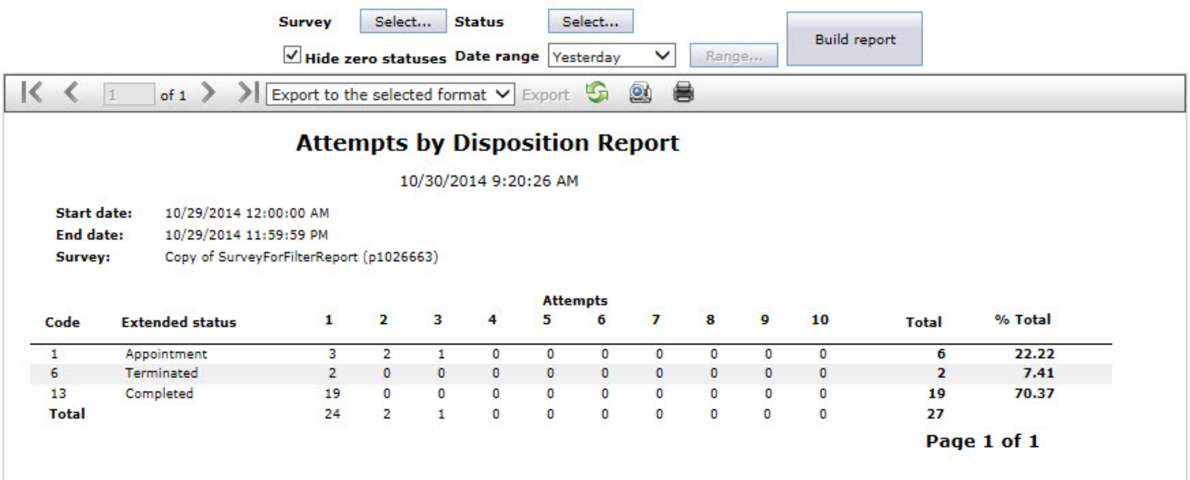


Figure 380 The generated Attempts by disposition Report

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.

   Press the Previous button to jump one page back, press 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 press 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. Press the Refresh button to do it.
9. The generated report can be exported and printed out – refer to Exporting the generated report on page 416 and Printing out the generated report on page 416 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 the Reports object tab in the left Navigation frame.
2. Double-click the Number of Attempts report item in the left Navigation frame, or double-click this report type in the list in the top right frame. You can also right-click the Number of Attempts Report item in the left Navigation frame and choose Show from the context menu that appears.

   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 in the top right frame (in the separate window if you run the command from the Surveys list).

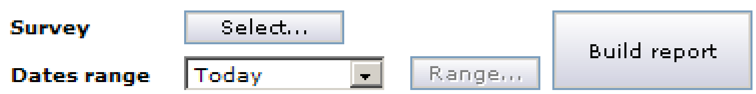


Figure 381 Configuring the Number of attempts Report

   This window interface lets you configure all the parameters required to generate the Number of attempts Report.

3. Select a single survey (or a number of surveys) for which the report will be generated. Press the Select button (Survey) to display the Select Surveys dialog window (see description of this form here - Selecting surveys to display in the grid in the Survey List activity view on page 291). Press 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 (contained in the right frame) at any moment of time.

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. Press the Range button to display the Date Range form.

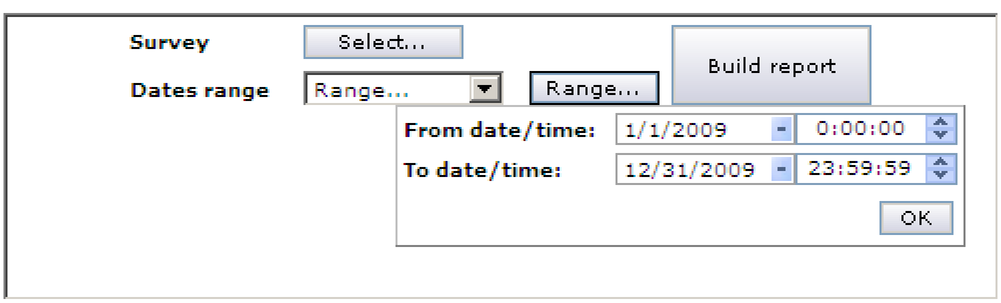


Figure 382 Choosing the date range for the Number of Attempts Report

   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 press 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. Press 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. Press the Build Report button to generate the Number of Attempts Report.

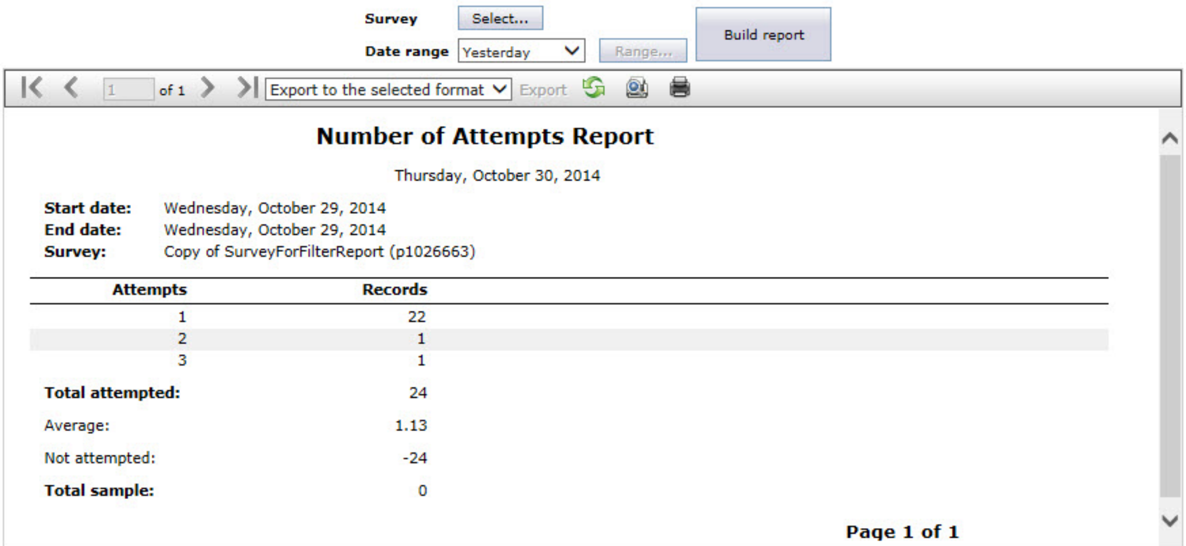


Figure 383 The generated Number of Attempts Report

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.

   Press the Previous button to jump one page back, press 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 press 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. Press the Refresh button to do it.

8. The generated report can be exported and printed out – refer to Exporting the generated report on page 416 and Printing out the generated report on page 416 for instructions.

9.12 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:

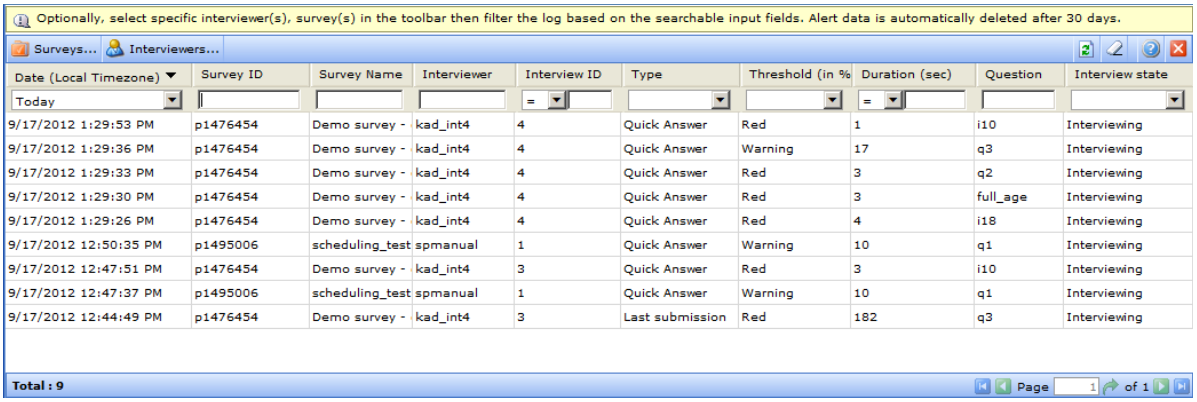
- Date (local timezone) - the date when the alert was raised (in the local timezone),
- Survey ID,
- Survey Name,
- Interviewer - interviewer name,
- Interview ID,
- Type - type of the alert raised (either Last Submission, or Quick answer),
- Threshold - the threshold type that was reached (or exceeded),
- 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 Open-end 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 the Reports object tab in the left Navigation frame.
2. Double-click the Interviewer Submission Details item in the left Navigation frame, or double-click this report type in the list in the top right frame. You can also right-click the Interviewer Submission Details item in the left Navigation frame and choose Show from the context menu that appears.

   This will display the Interviewer Submission Details Log in the top right frame of the CATI Supervisor window.



Date (Local Timezone)	Survey ID	Survey Name	Interviewer	Interview ID	Type	Threshold (in %	Duration (sec)	Question	Interview state
Today				=			=		
9/17/2012 1:29:53 PM	p1476454	Demo survey -	kad_int4	4	Quick Answer	Red	1	i10	Interviewing
9/17/2012 1:29:36 PM	p1476454	Demo survey -	kad_int4	4	Quick Answer	Warning	17	q3	Interviewing
9/17/2012 1:29:33 PM	p1476454	Demo survey -	kad_int4	4	Quick Answer	Red	3	q2	Interviewing
9/17/2012 1:29:30 PM	p1476454	Demo survey -	kad_int4	4	Quick Answer	Red	3	full_age	Interviewing
9/17/2012 1:29:26 PM	p1476454	Demo survey -	kad_int4	4	Quick Answer	Red	4	i18	Interviewing
9/17/2012 12:50:35 PM	p1495006	scheduling_test	spmanual	1	Quick Answer	Warning	10	q1	Interviewing
9/17/2012 12:47:51 PM	p1476454	Demo survey -	kad_int4	3	Quick Answer	Red	3	i10	Interviewing
9/17/2012 12:47:37 PM	p1495006	scheduling_test	spmanual	1	Quick Answer	Warning	10	q1	Interviewing
9/17/2012 12:44:49 PM	p1476454	Demo survey -	kad_int4	3	Last submission	Red	182	q3	Interviewing

Figure 384 Interviewer Submission Details Log displayed in the top right frame of the CATI Supervisor window

3. You can view the log for particular surveys, or interviewers. Press 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 press 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.

   Please refer to Selecting surveys to display in the grid in the Survey List activity view on page 291 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.
4. You may want to update the log - press the Refresh button in the top right corner of the frame to do it.
5. 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 press the Refresh button to update the log (or press Enter after all required filters are set).
6. 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.
7. 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.

9.13 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 Viewing the Interviewer Submission Details Log on page 413 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 the Reports object tab in the left Navigation frame.
2. Double-click the Aggregated Interviewer Submission Report item in the left Navigation frame,or double-click this report type in the list in the top right frame. You can also right-click the Aggregated Interviewer Submission Report item in the left Navigation frame and choose Show from the context menu that appears.

   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/Interviewer Productivity Report from the context menu that appears.

   This will display the Interviewer Productivity Report settings in the top right frame.

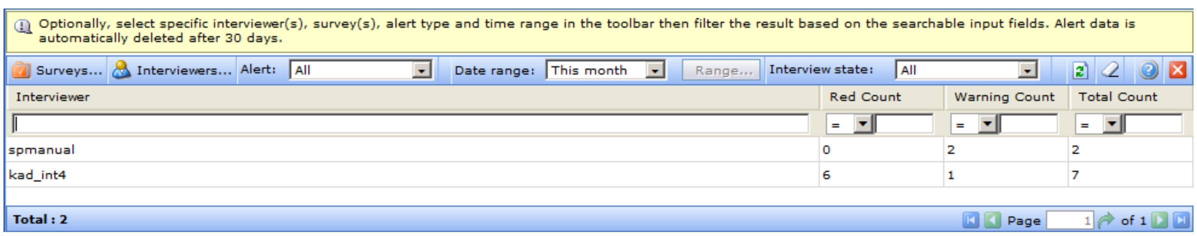


Figure 385 Viewing the Aggregated Interviewer Submission Report

3. You can generate the report for particular surveys, or interviewers. Press the Surveys button 

 in the upper left corner of the frame to display the Select Surveys dialog window.

   To generate the report for particular interviewers press the Interviewers button 

 in the upper left corner of the frame to display the Select Interviewers dialog window.

   Please refer to Selecting surveys to display in the grid in the Survey List activity view on page 291 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.
4. 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), please refer to Generating the Survey Productivity Report on page 380 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).
5. 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.

6. You may want to update the report - press the Refresh button in the top right corner of the frame to do it.
7. 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 press the Refresh button to update the report (or press Enter after all required filters are set).
8. 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.

9.14 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.

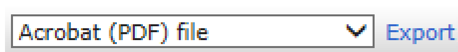


Figure 386 Exporting the Report

   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. Press 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.

9.15 Printing out 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. Press 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 press 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.

2. Choose the desired print options and press Print to print out the report.

10 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. 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 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.	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.	Updates the call properties
Decrement quantity variable	String	Enter a quantity variable name	Decrements the quantity variable value by one.	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.	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.	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.	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.	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 the function call to the specified variable.	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 subrule number. Current subrule number is not allowed.	Specifies the subrule 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

11 Appendix B - Known limitation list

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.

12 Appendix C - The 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 Keyboard support in the CATI Interviewer Console on page 268 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 Interviewer on a break on page 273 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

13 Appendix D - A note regarding the sample updates

This is an important note pertaining to the operation that is performed in Confirmit Authoring module. Although the actions described in this topic are not performed in the CATI Supervisor module, the results of these actions may affect the values that are available in CATI Supervisor and are extensively used in everyday work.

This note pertains to one operation type only - to the update of the sample database records. In other words this information is important only in case the supervisor updates the database contents through a sample addition in the "Merge" or "Update" upload mode (this is done with the help of Confirmit Authoring module - please refer to the corresponding Authoring help section).

Whenever the Supervisor introduces changes to the sample data in this way, it is recommended to perform the sample data synchronization.

All other update operations do not require such actions to be performed.

The sample data synchronization should be performed regardless of which particular field values were changed, and what command was used to introduce this update (it can be the Update, or Merge command).

If synchronization was not performed after the sample data is updated the sample values will be retrieved from the table which contents were not updated.

This, for example, can be the value of a background variable: if the "f" function is used to access background-variable values and data synchronization was not performed – in CATI Interviewer Console you will see and use an outdated value.

To make sure all sample database contents are updated after the sample addition with "Merge" or "Update" upload mode, you should do the following:

- in Confirmit Authoring module run the **Synchronize** command by choosing **Confirmit > Respondents > Edit > Synchronize** from the main menu in Confirmit Authoring module.

After the operation is successfully finished you can continue working in the CATI module - all values from the sample database will be retrieved updated.

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
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
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 - The list of the predefined Extended Statuses

Below is the list of the predefined Extended Status names, codes, and descriptions.

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 inter-viewer	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

16 Appendix G - The 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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