CONFIRMIT CATI SUPERVISOR USER GUIDE

C17.5 rev 2

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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 and 10, 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 296.

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.

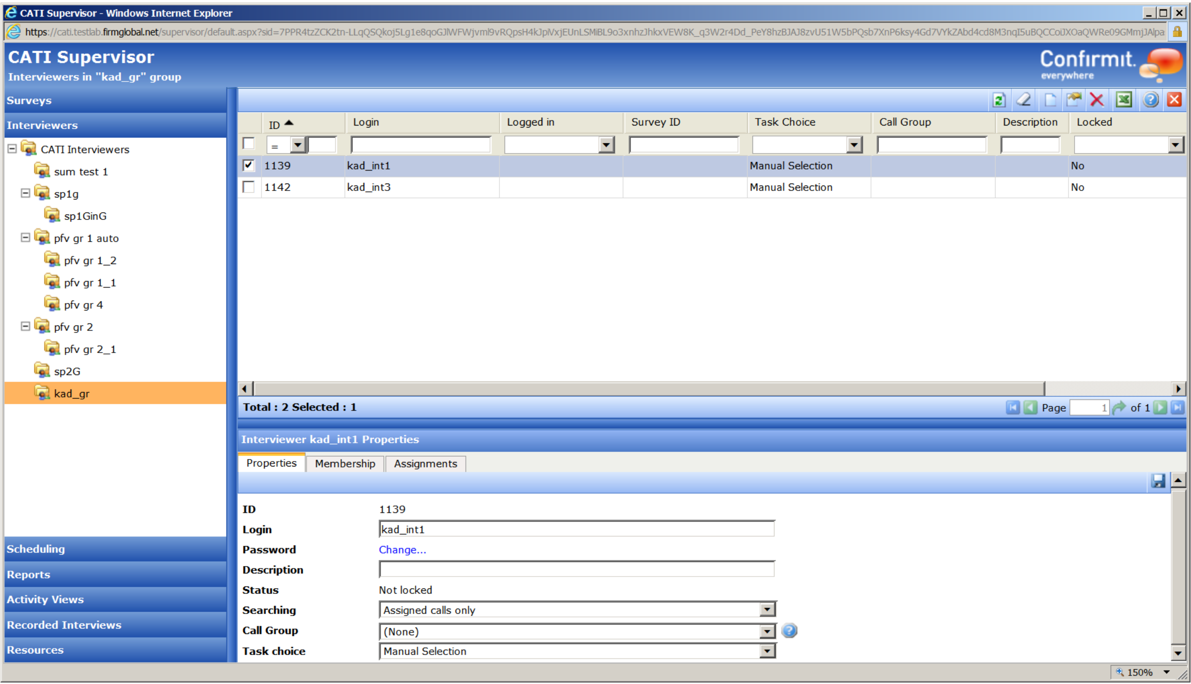


Figure 1 The CATI Supervisor main window

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).

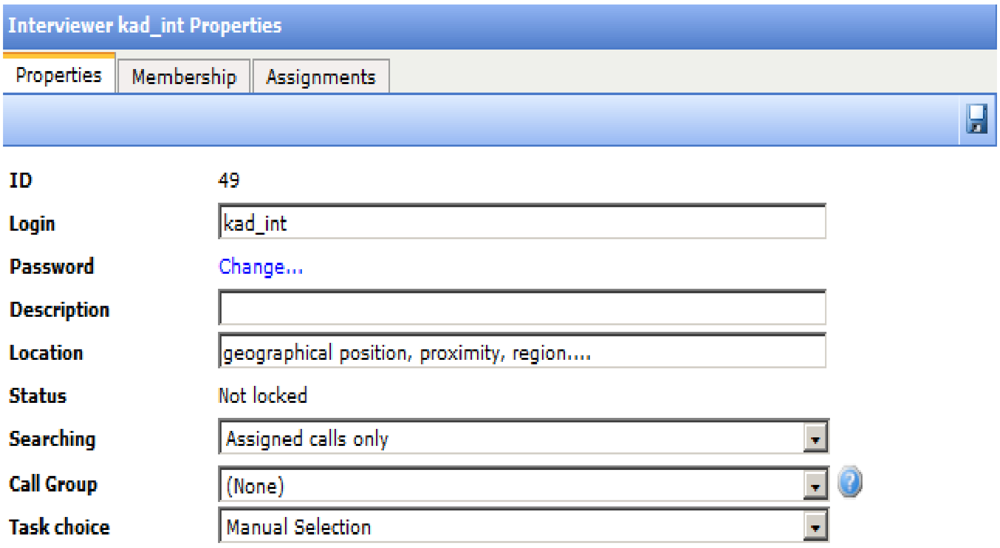


Figure 2 The tabbed interface used with the dialog window

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.

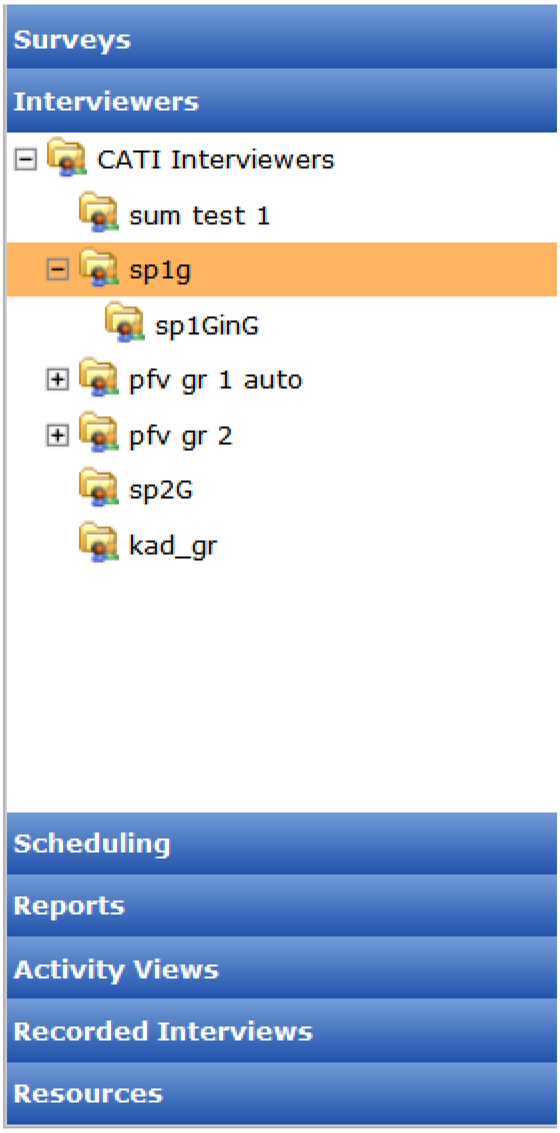


Figure 3 The Navigation menu (the left frame)

The following object types are accessible from the Navigation menu:

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

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.

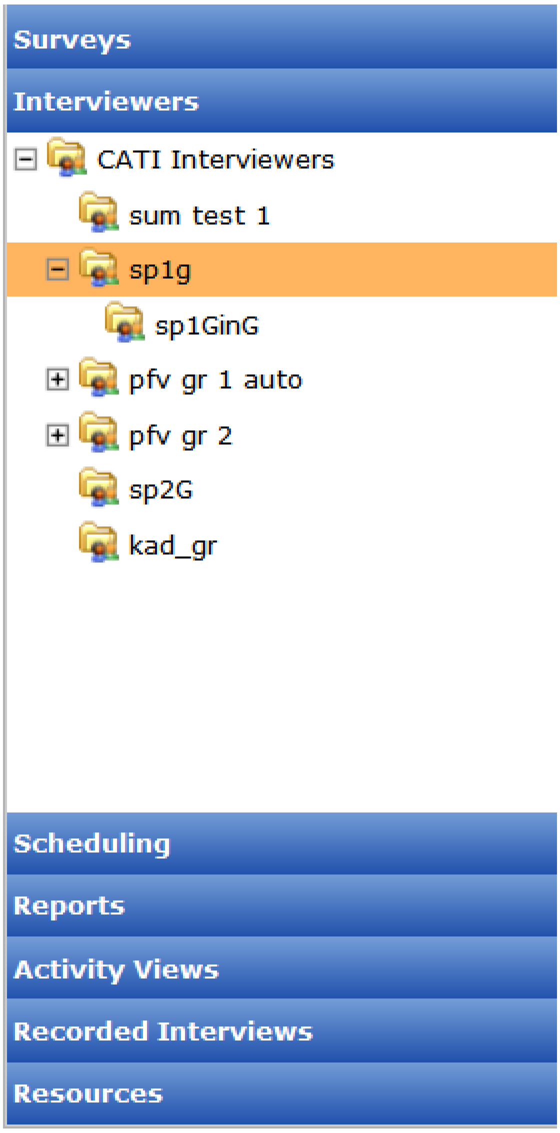


Figure 4 Hierarchy tree in the Navigation menu

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.

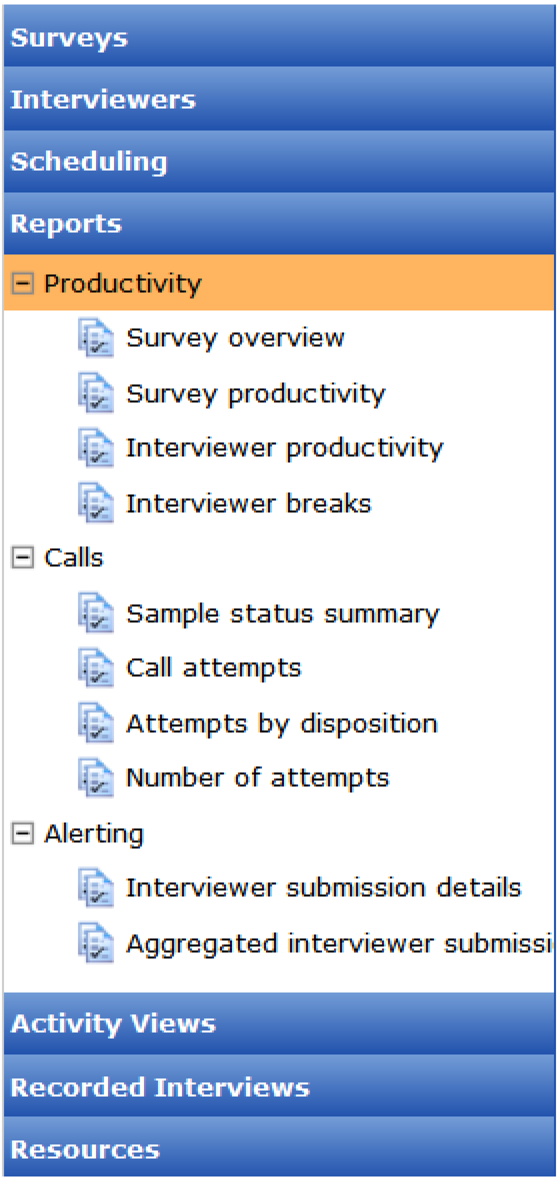


Figure 5 Object groups in the Navigation menu

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.

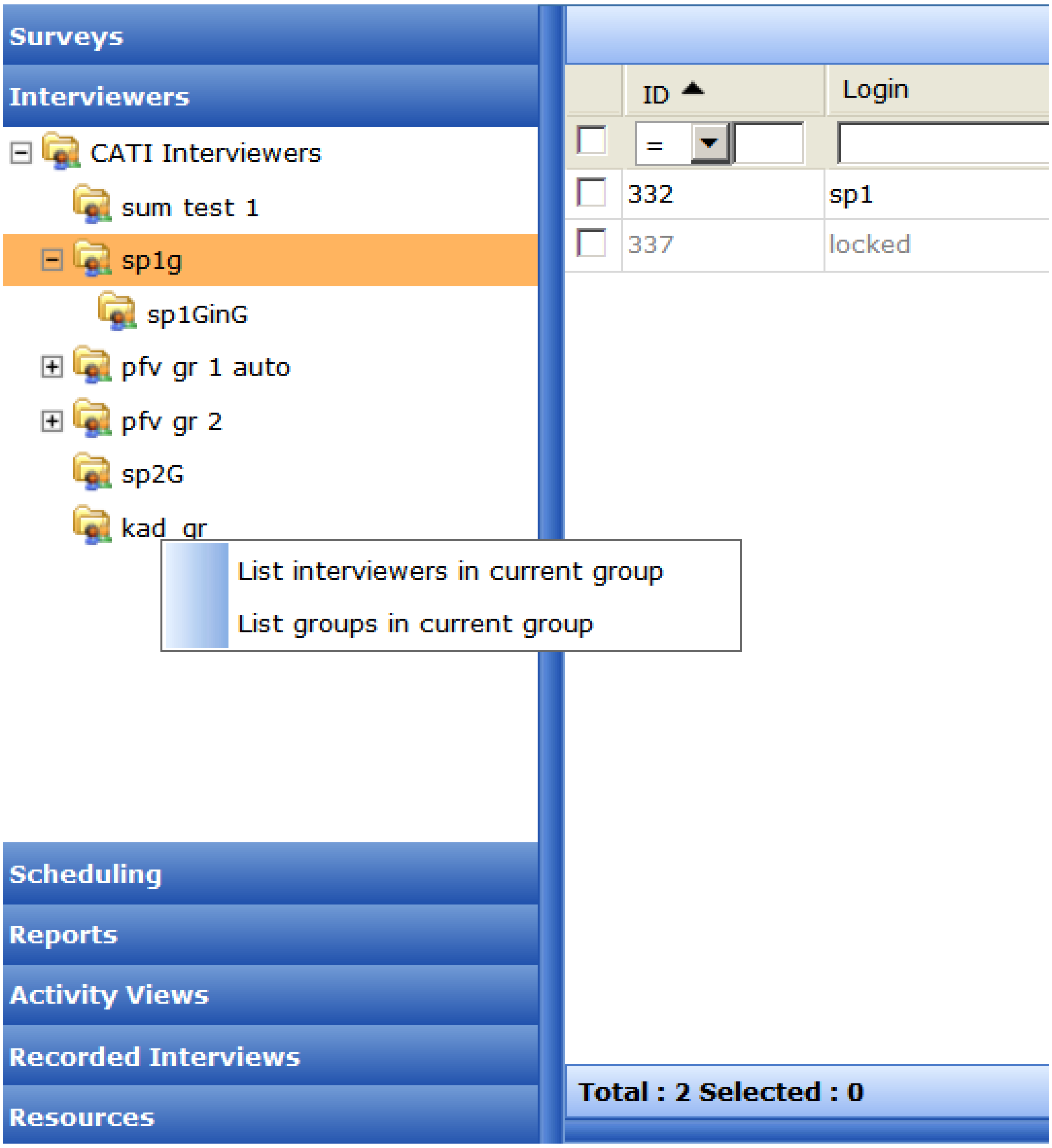


Figure 6 Example of a context menu used with the Navigation menu items

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

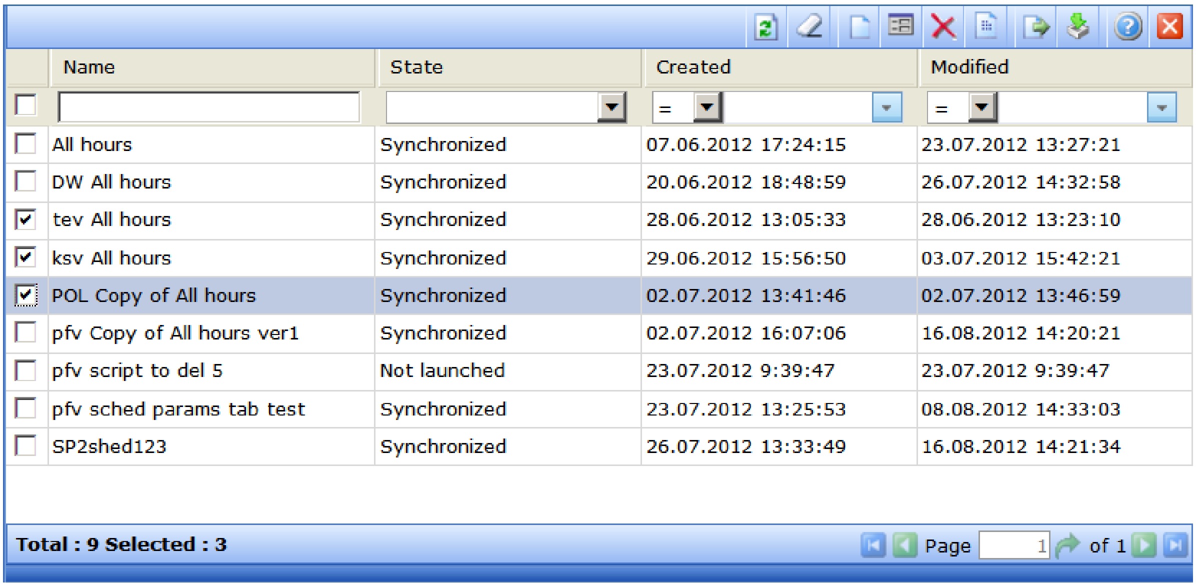
- By double-clicking the appropriate object group name in the menu frame;
- Through the use of the shortcut menu, which is activated by right-clicking the appropriate object group name. The user must select the List command from this shortcut menu then.

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.



	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 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.

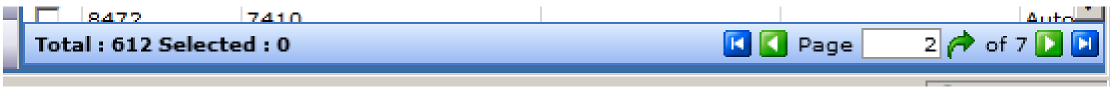


Figure 8 Grid browse controls

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.

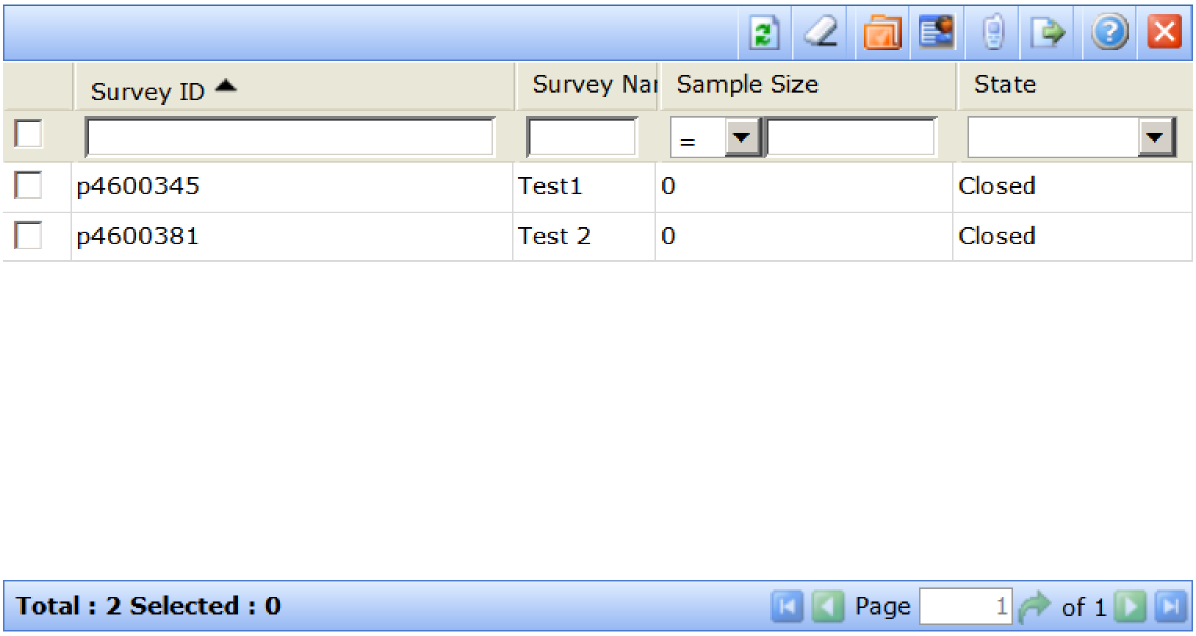


Figure 9 Survey list sorted by the Project ID in the ascending order

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.

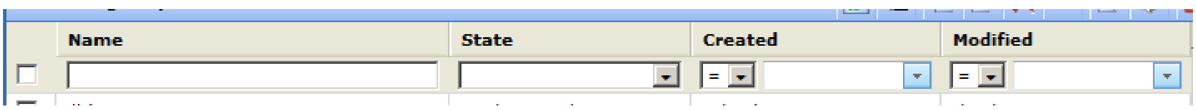


Figure 10 Grid header row with search functionality

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 9) 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 8 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.

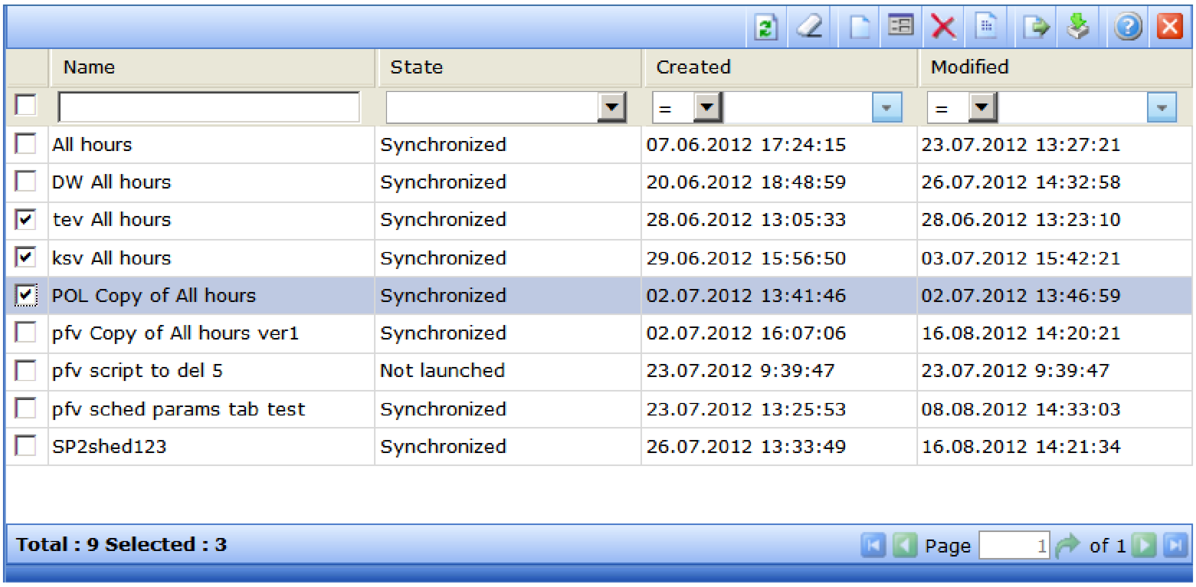


Figure 11 Three objects selected on the grid page

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 submenu 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 9 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.

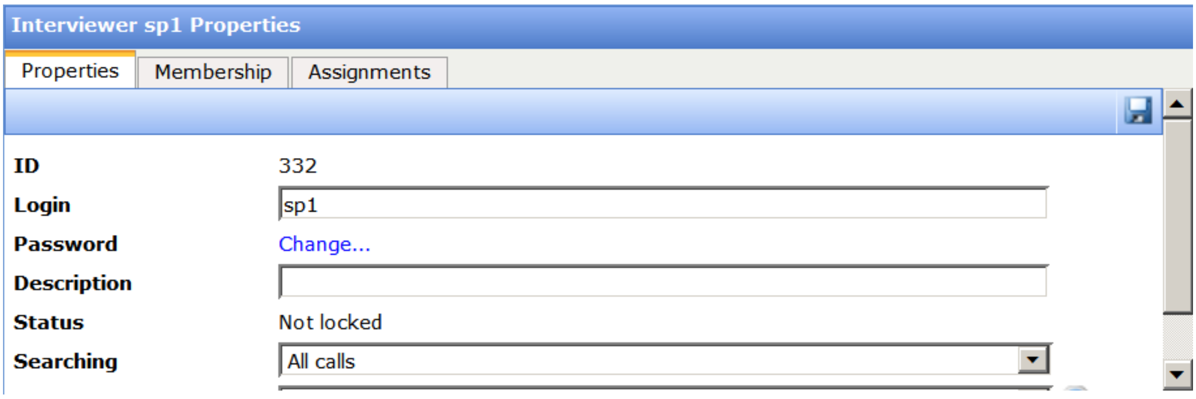


Figure 12 Contents of the bottom right frame - an example

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 7 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.

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 25 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 24 – 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.

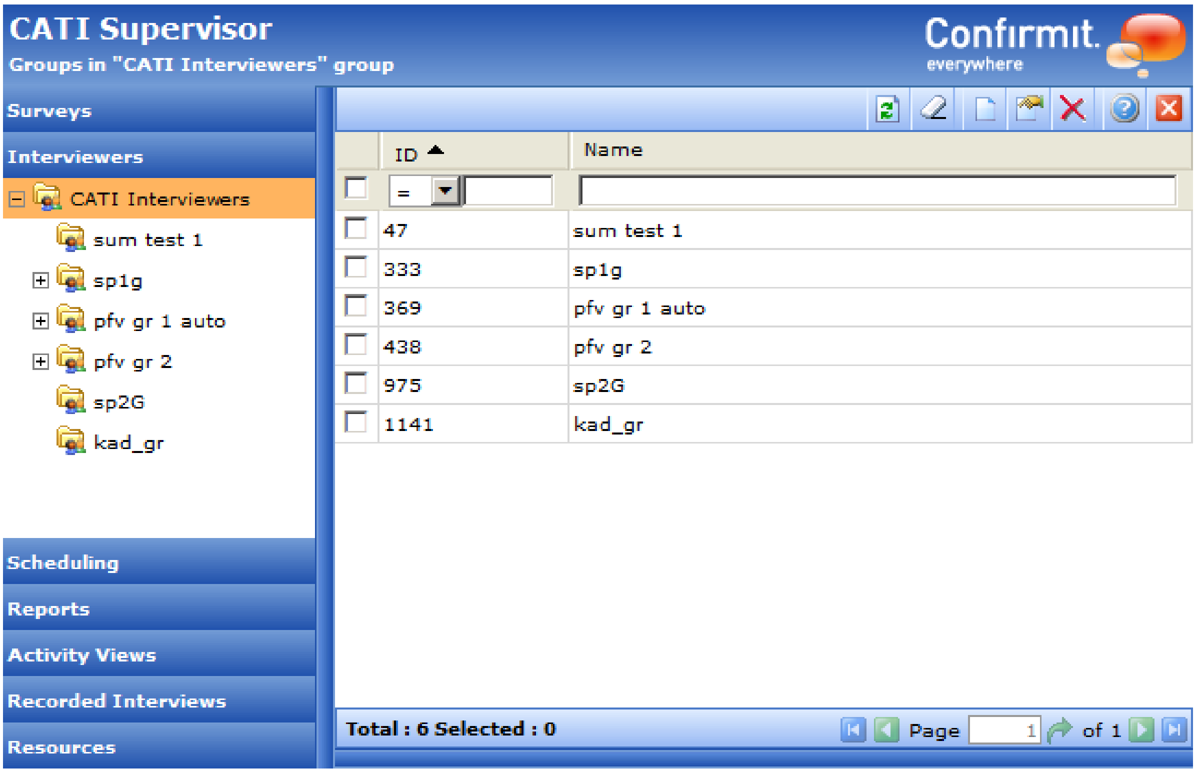


Figure 13 Viewing the interviewer group list in the top right frame

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.

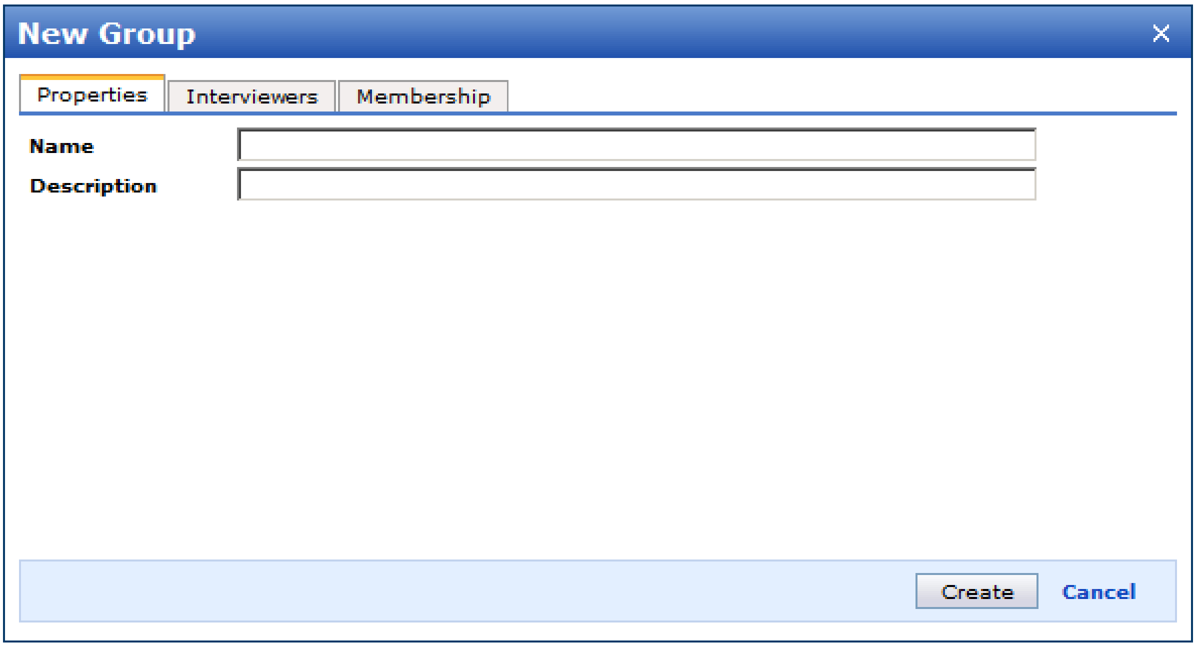


Figure 14 New Group dialog window - Properties tab

   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.

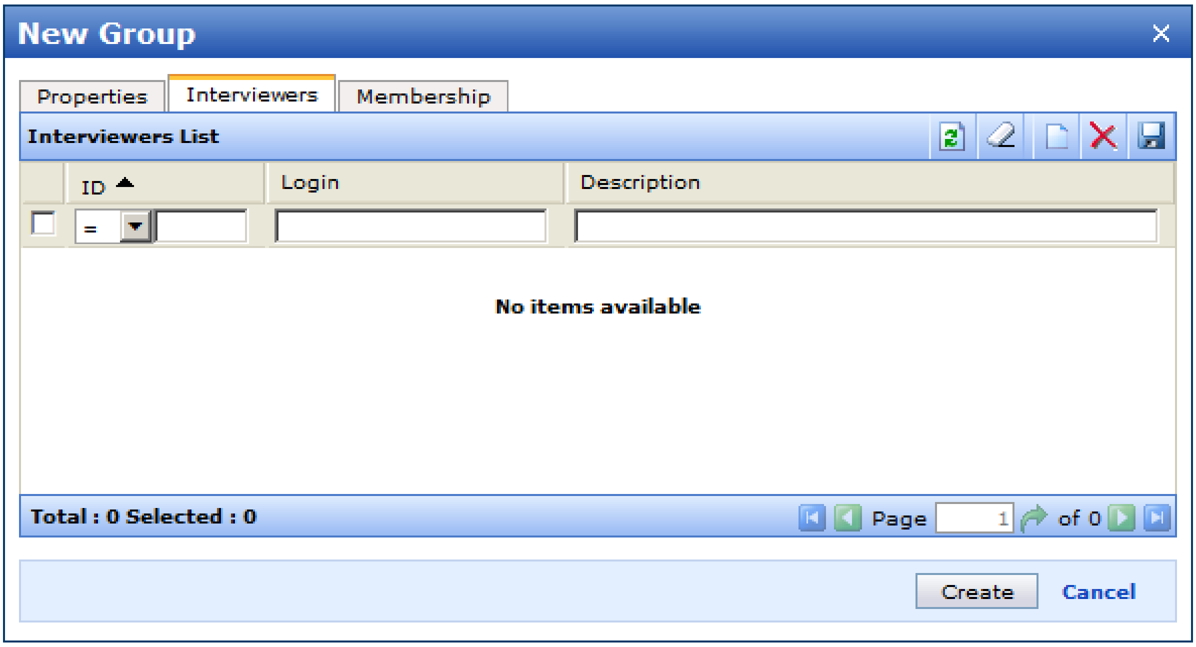


Figure 15 New Group dialog window - Interviewers tab

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 Select Interviewers dialog window.

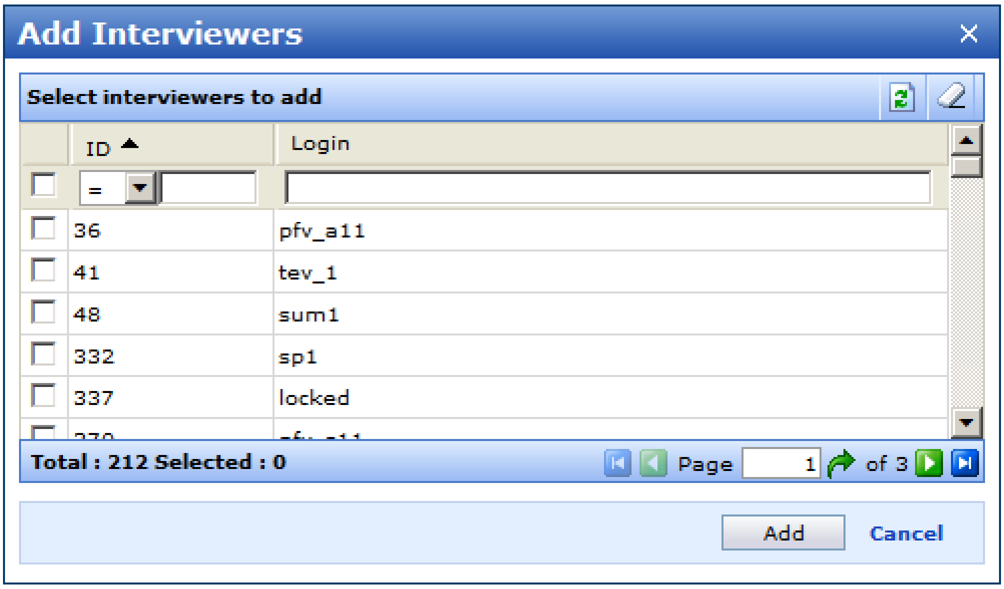


Figure 16 Selecting interviewers to add to the Interviewers tab

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 25 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.

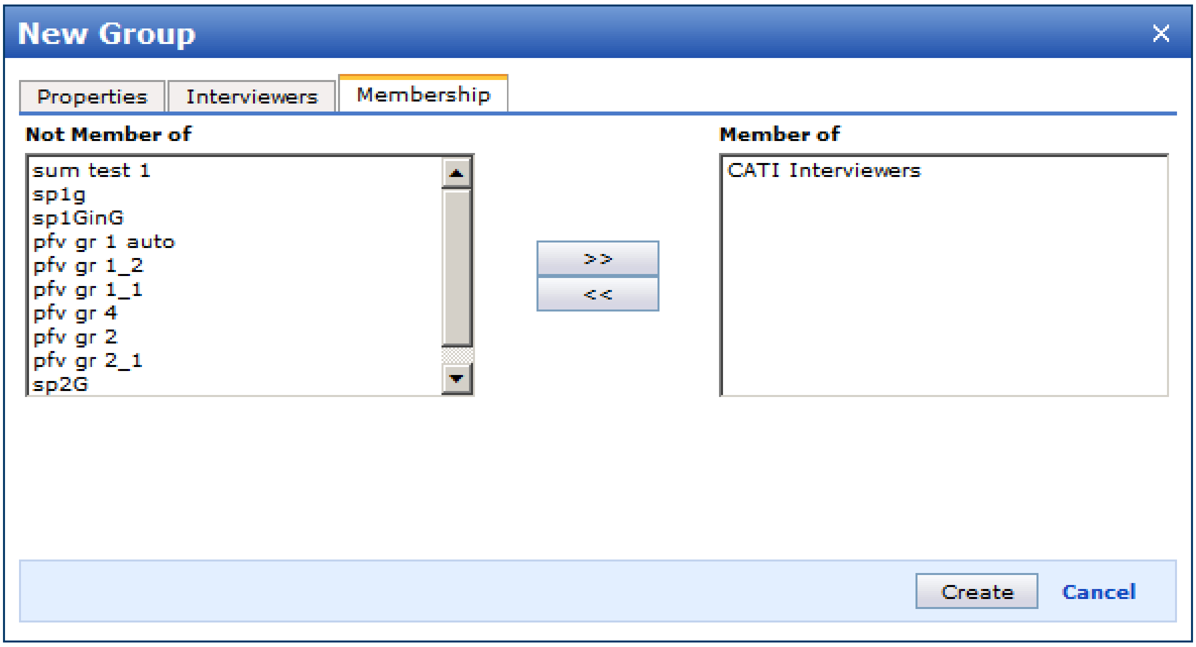


Figure 17 New Group dialog window - Membership tab

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.

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.

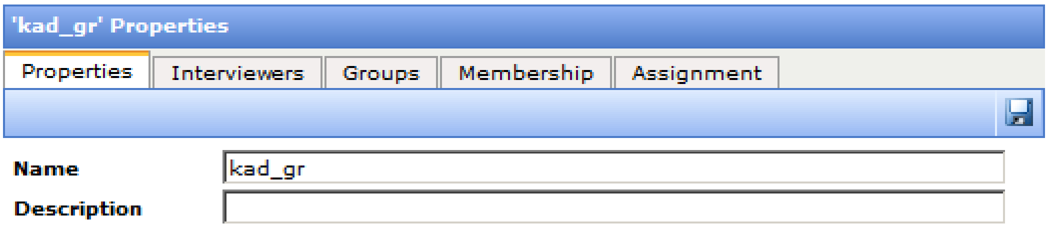


Figure 18 Interviewer group properties, Properties tab - the right bottom frame

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 15 for description). The same work technique is applied with these tabs.

   Pictures below show these tabs.

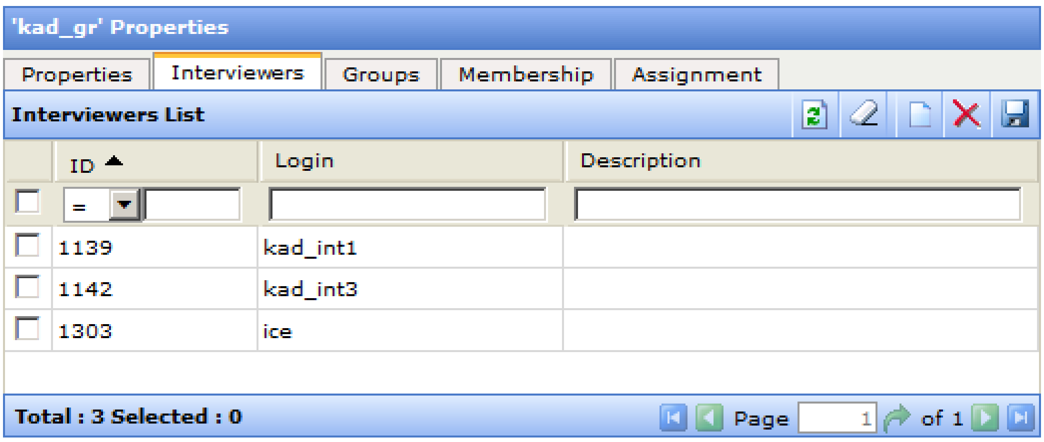


Figure 19 Interviewer group properties, Interviewers tab - the right bottom frame

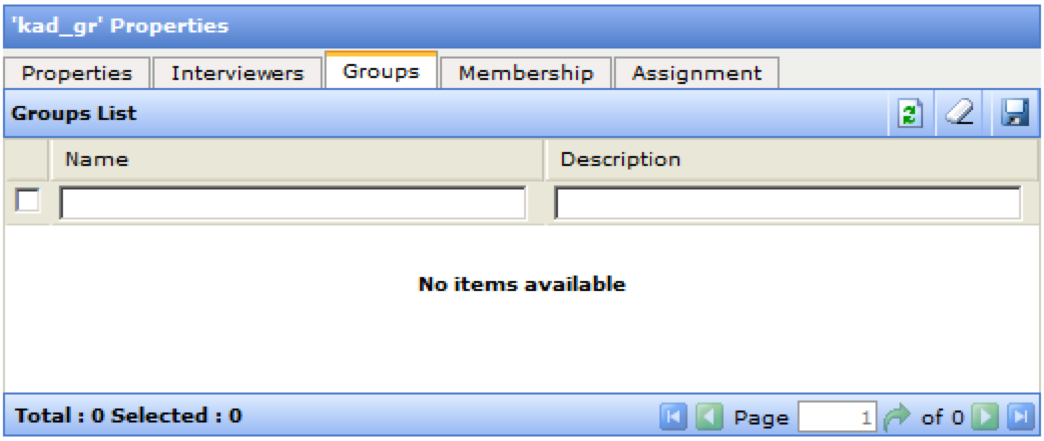


Figure 20 Interviewer group properties, Groups tab - the right bottom frame

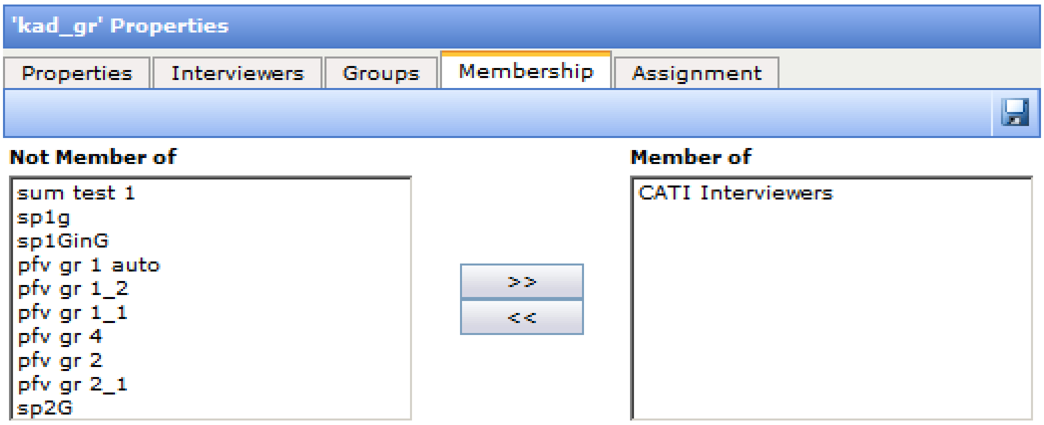


Figure 21 Interviewer group properties, Membership tab - the right bottom frame

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 30 for instructions). To view assignments made for a nested interviewer group you should view this group's properties.

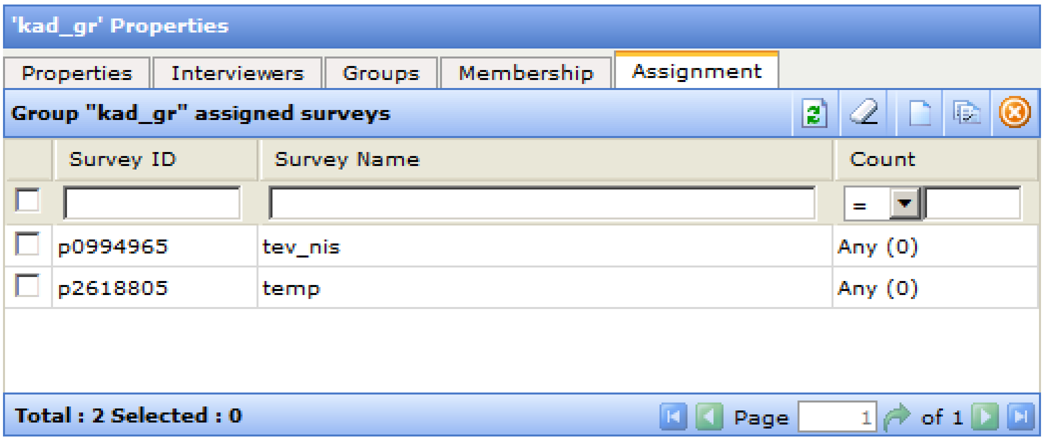


Figure 22 Interviewer group properties, Assignment tab - the right bottom frame

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.

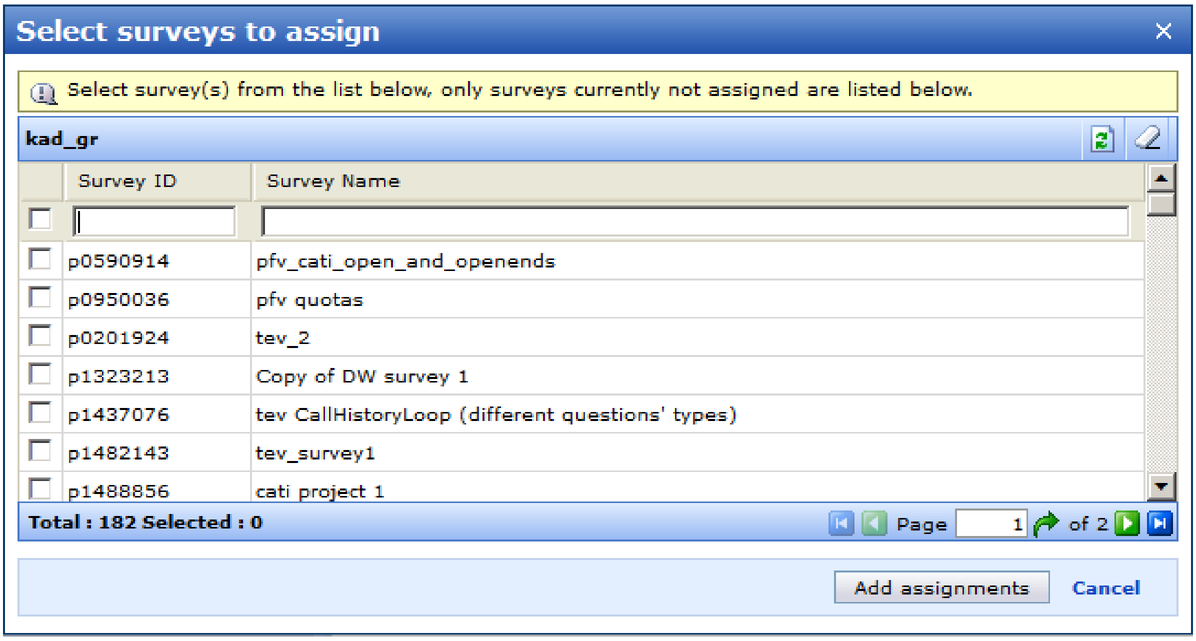


Figure 23 Selecting a survey to assign using the Select surveys to assign dialog window

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.

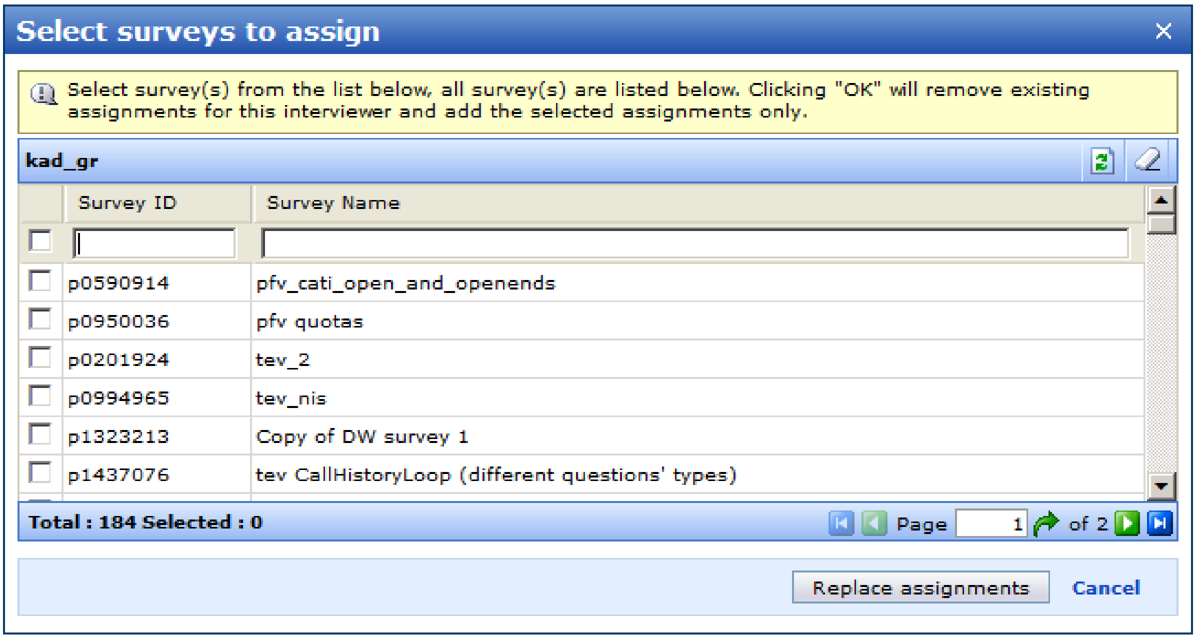


Figure 24 Selecting surveys to replace the existing assignment for an interviewer group

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.

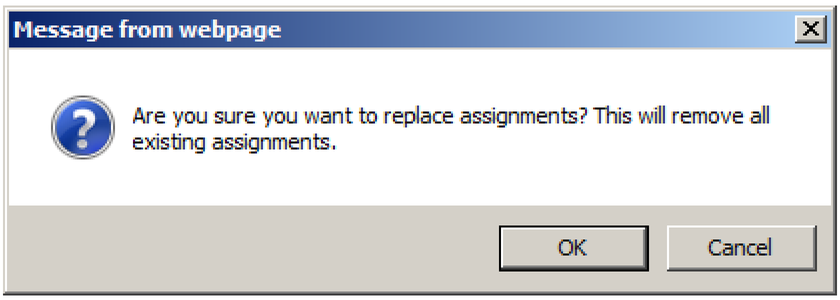


Figure 25 Warning message displayed on the attempt to execute the assignment replacement

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 13 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.

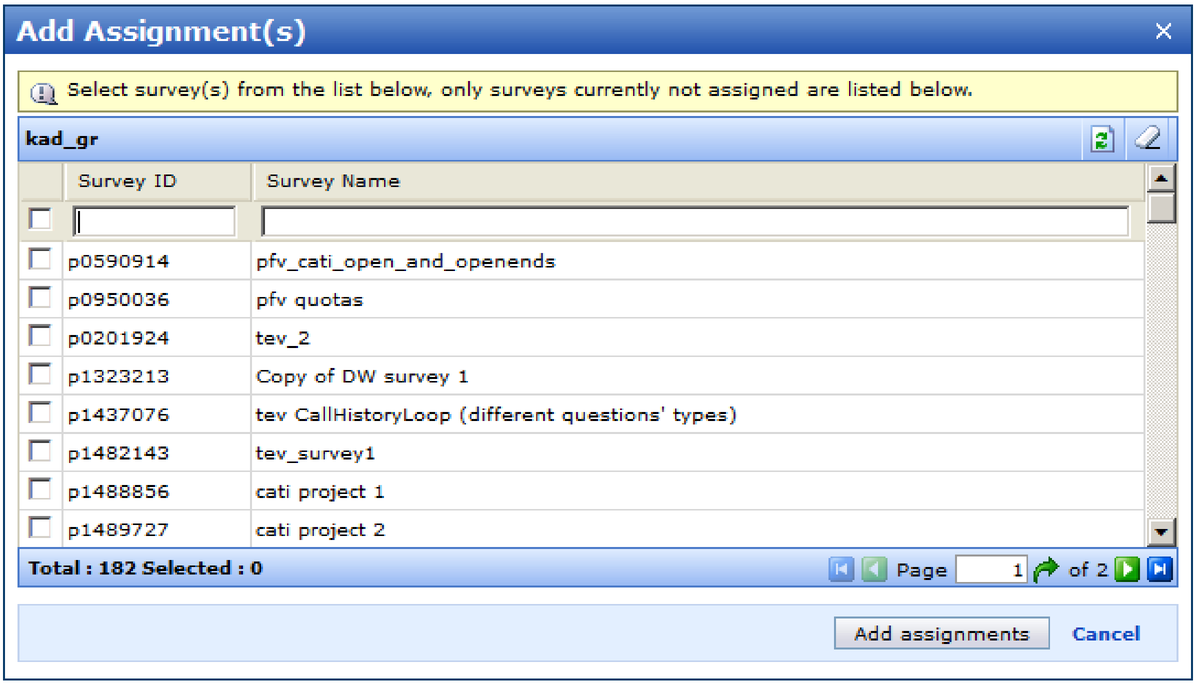


Figure 26 Selecting a survey to assign in the Add Assignment window

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 13 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.

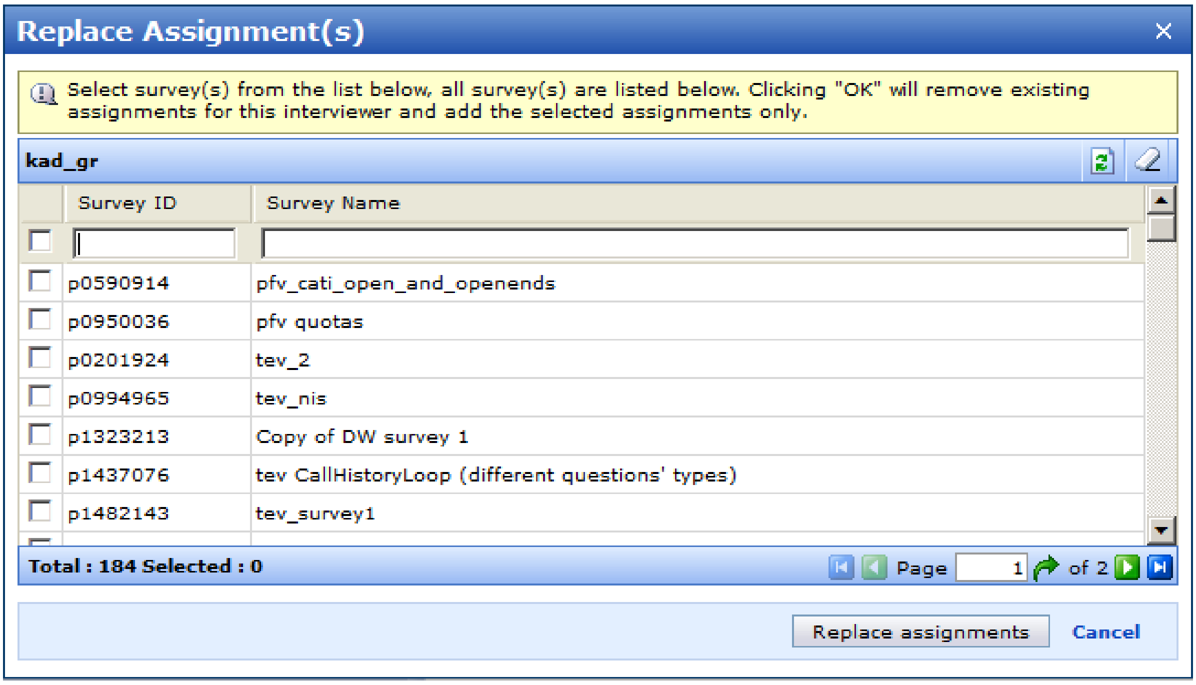


Figure 27 Selecting a survey to replace assignment in the Replace Assignment window

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 43 for the procedure description.

2.2 Managing interviewers

When working with the Interviewer objects 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.

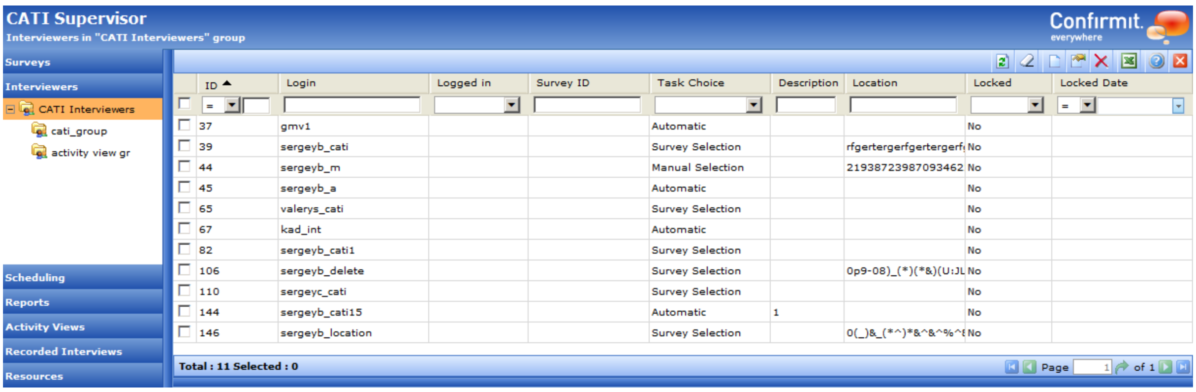


Figure 28 Viewing the interviewer list in the top right frame

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	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 the previous page 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 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.

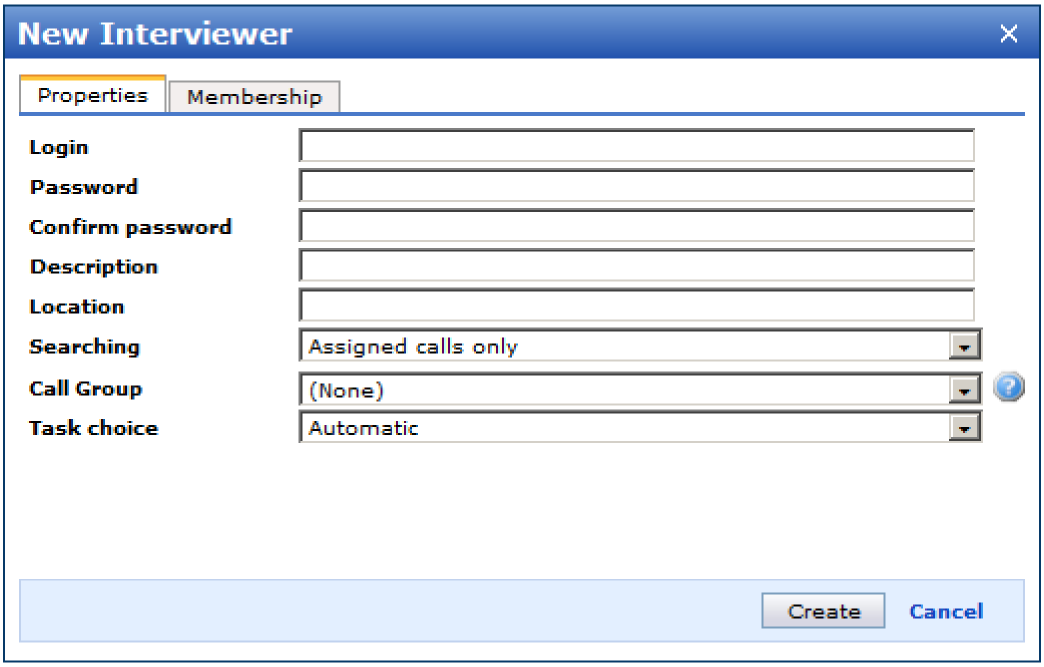


Figure 29 New Interviewer dialog window - Properties tab

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 47 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 pre-configured call sets - for full description of the option and configuration procedure please refer to Configuring the Call Groups on page 234. 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.

8. 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.

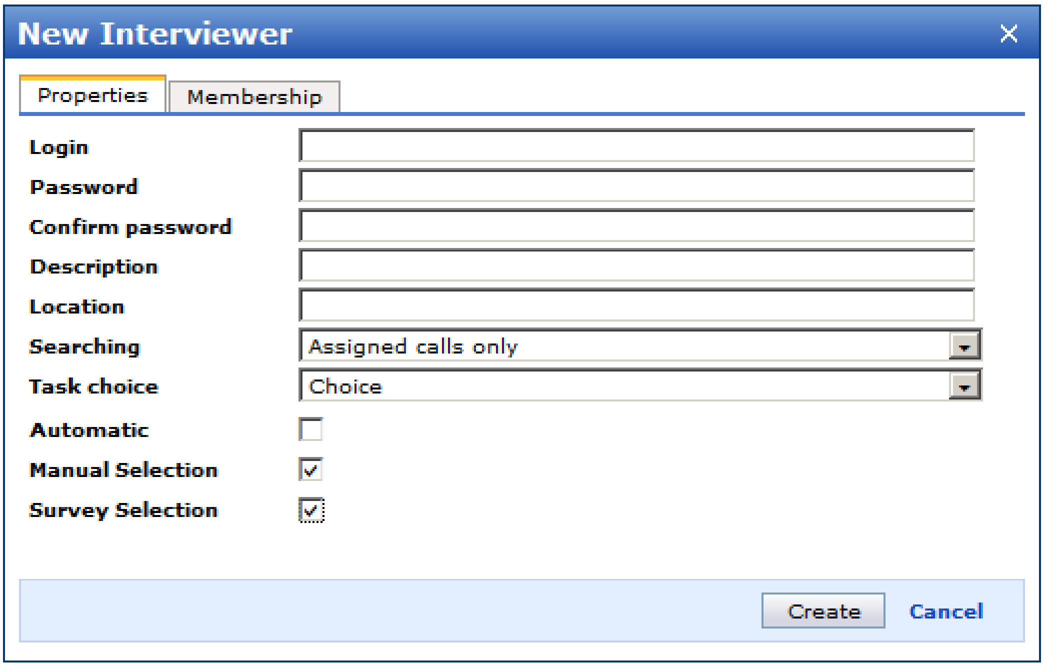


Figure 30 Selecting the "Choice" mode

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

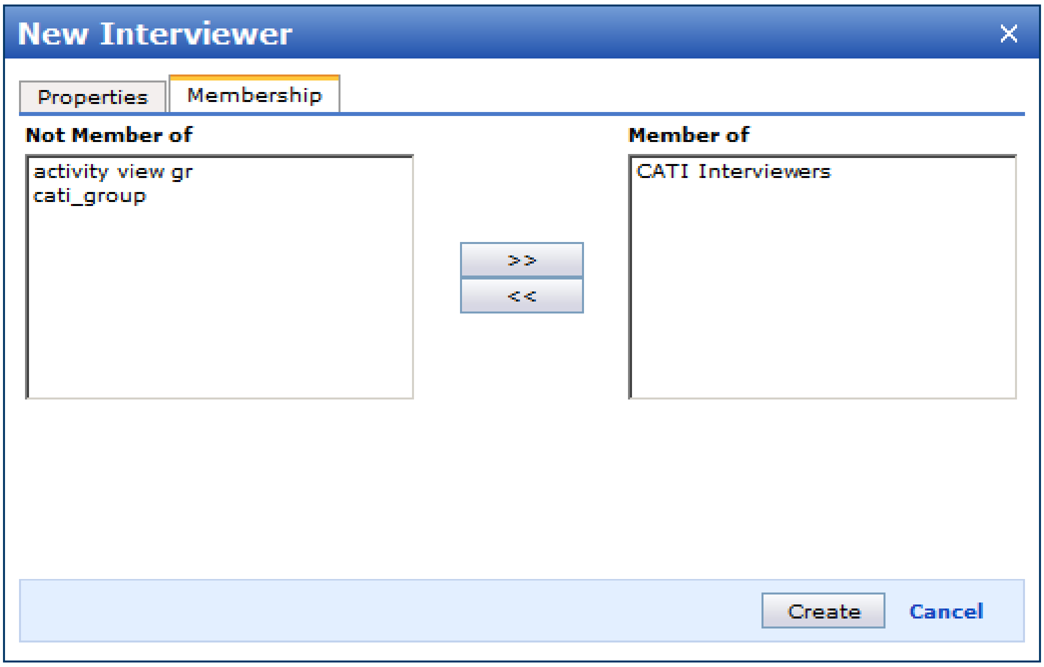


Figure 31 New Interviewer dialog window - Membership tab

By default this tab indicates that the interviewer is included 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.

10. 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 the interviewer related settings on page 254 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 24 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.

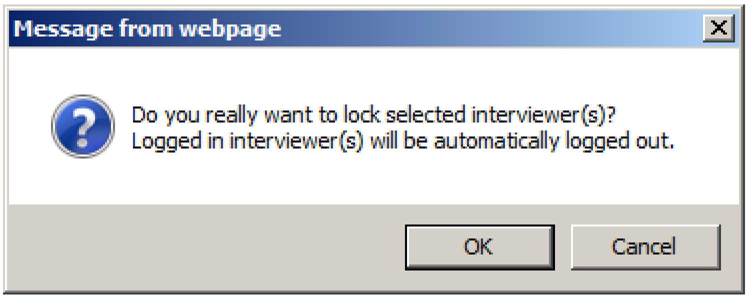


Figure 32 Confirming instant interviewer account locking

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).

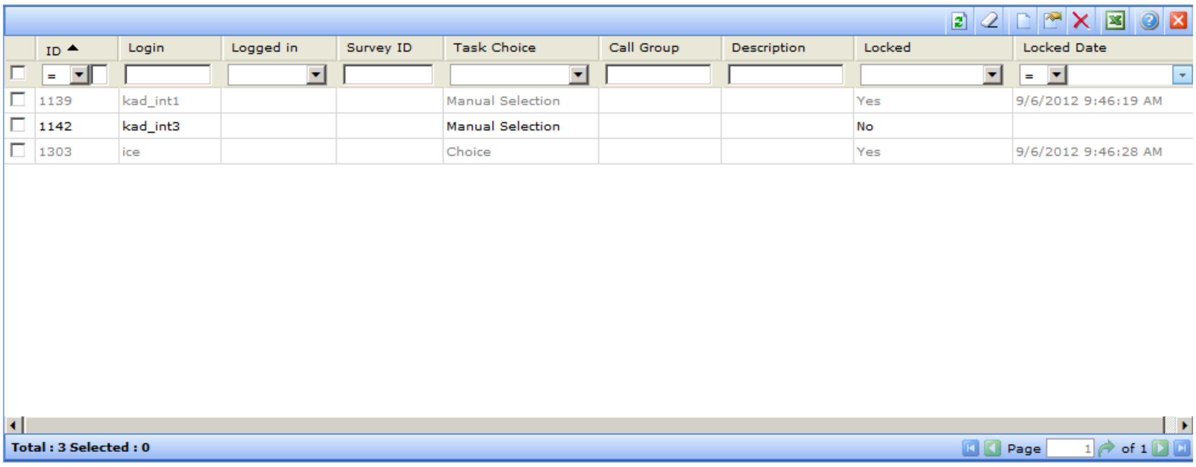


Figure 33 Interviewer list showing the locked interviewer accounts

To unlock an interviewer's account:

1. Display the Interviewer list in the top right frame (see Viewing the interviewer list on page 24 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.

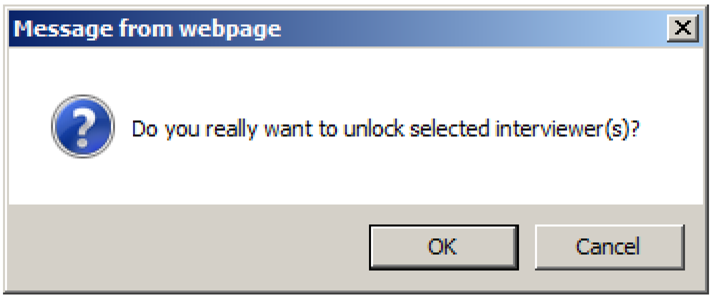


Figure 34 Confirming interviewer account unlocking

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 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 25 for description). The same work technique is applied with these tabs.

   Pictures below show these tabs.

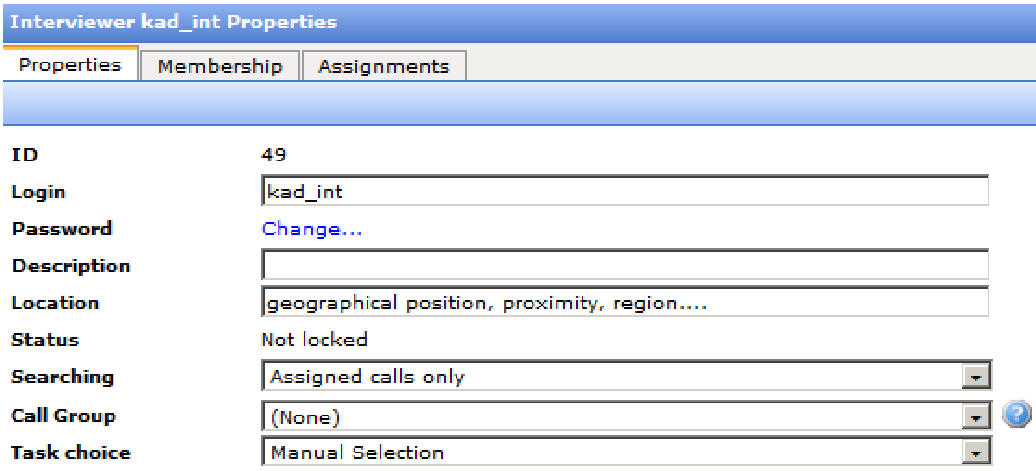


Figure 35 Interviewer properties, the Properties tab - the bottom right frame

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 29 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 47 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 234. 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.

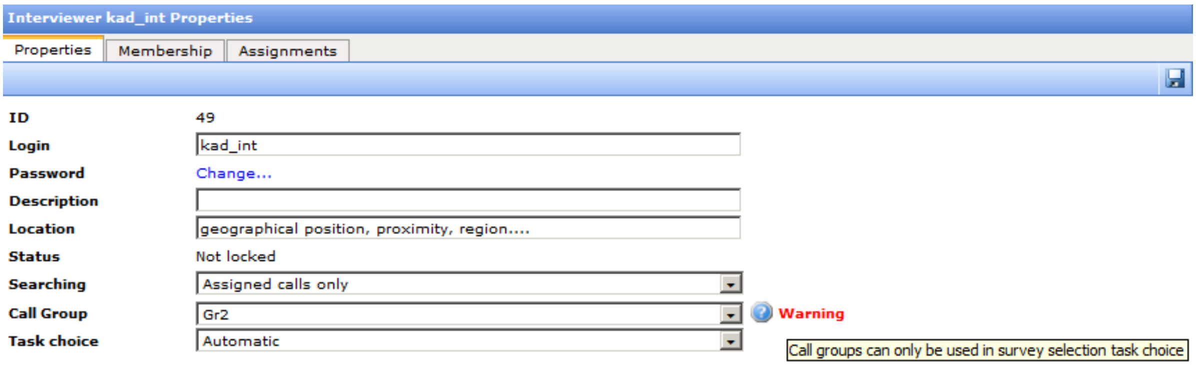


Figure 36 The Warning sign displayed when a call group is apllied to an interviewer not assigned for work in the Survey Selection task choice mode

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 165 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 165 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.

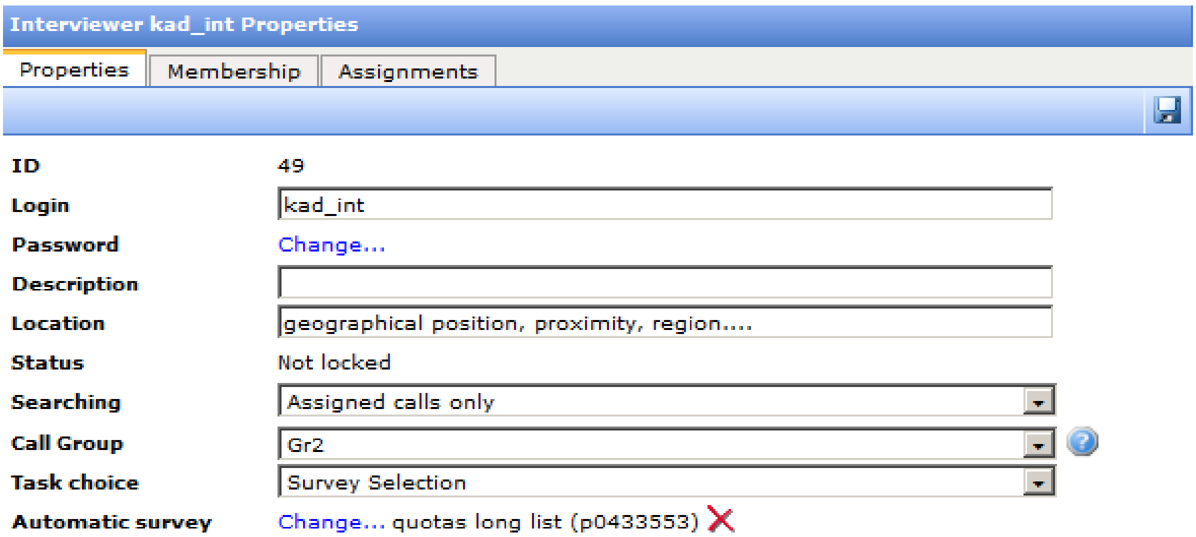


Figure 37 Interviewer properties, the Properties tab - the Survey Selection mode is chosen

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.

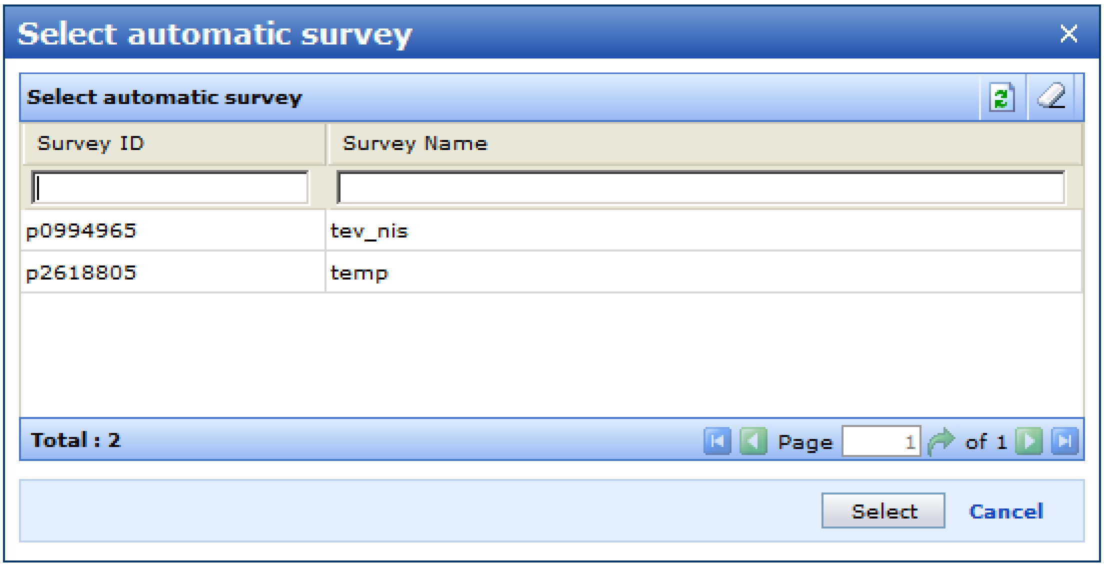


Figure 38 Selecting an Automatic survey in the Survey Selection task choice mode

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 170 for more details on working in the Choice mode.

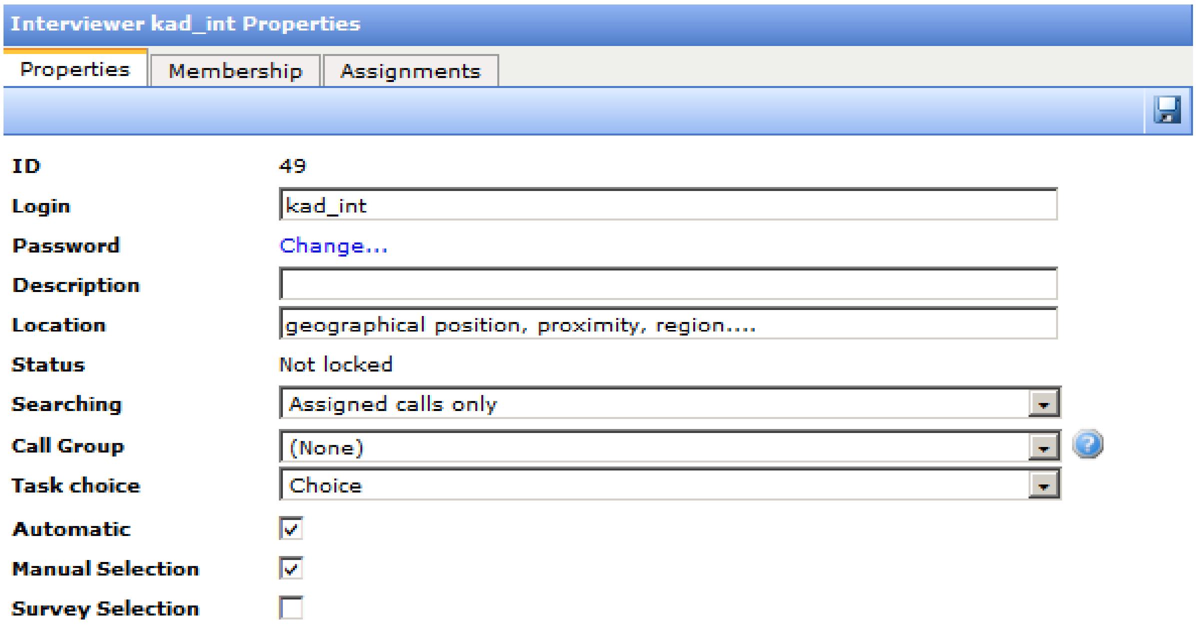


Figure 39 Interviewer properties, the Properties tab - the Choice mode is selected

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.

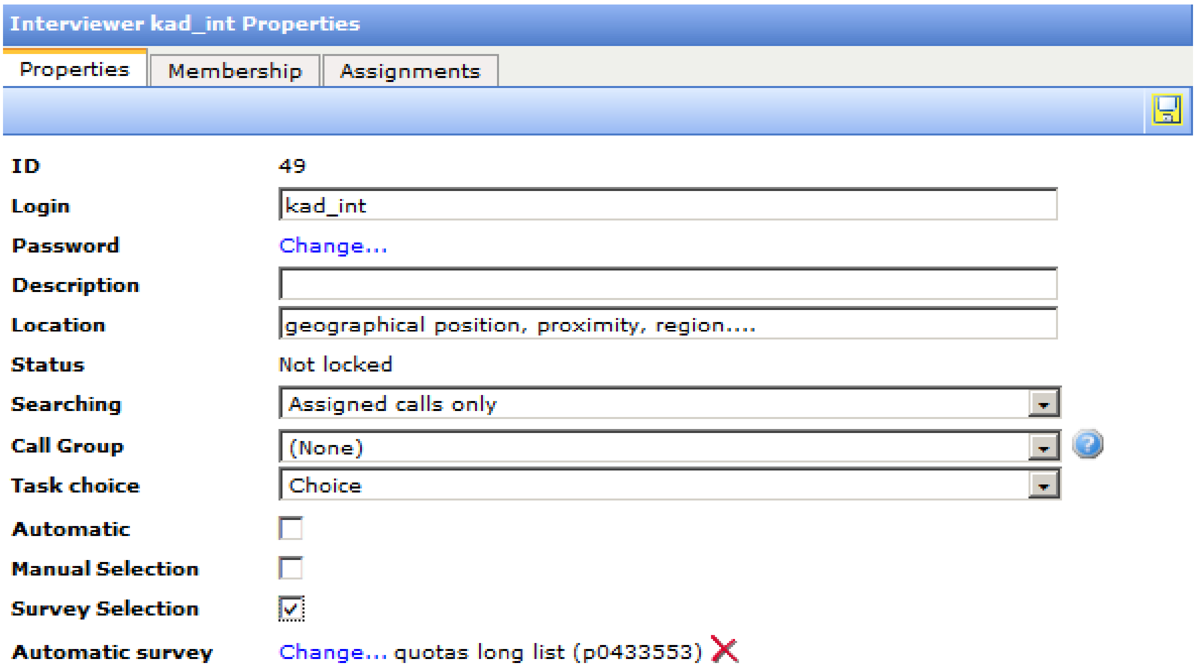


Figure 40 Interviewer properties, the Properties tab - the Automatic Survey option is selected for the interviewer working in the Choice mode

The Task Choice mode can also be changed from the Interviewer List (see Viewing the interviewer list on page 24 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 43 for instructions.

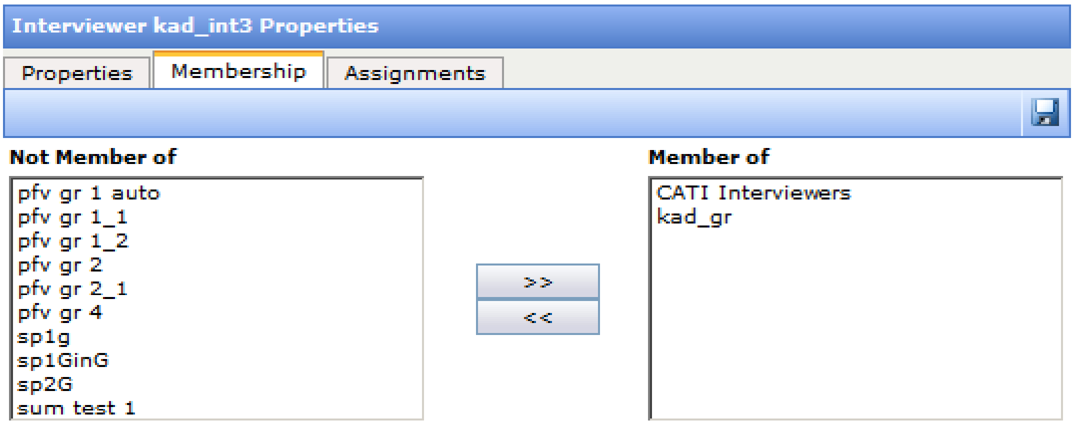


Figure 41 Interviewer properties, the Membership tab - the bottom right frame

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.

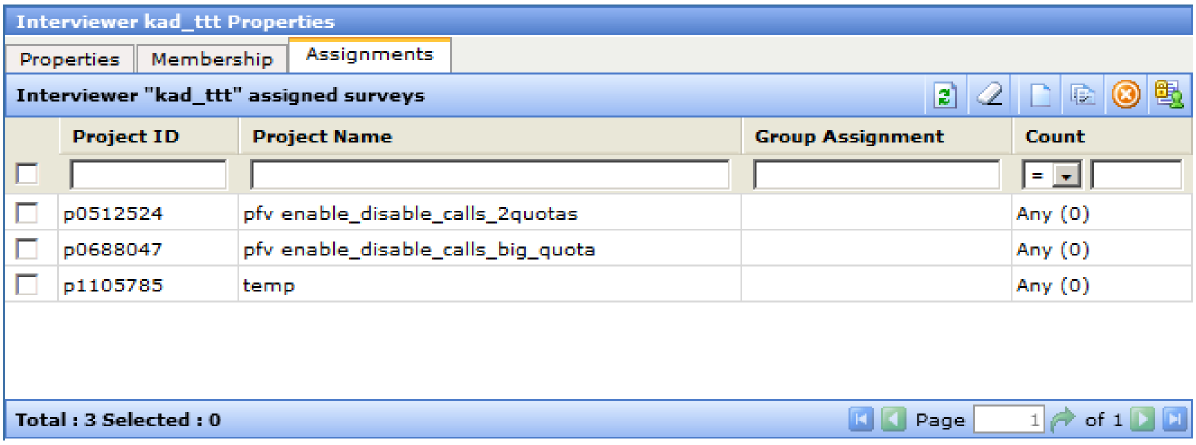


Figure 42 Interviewer properties, the Assignments tab - the bottom right frame

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.

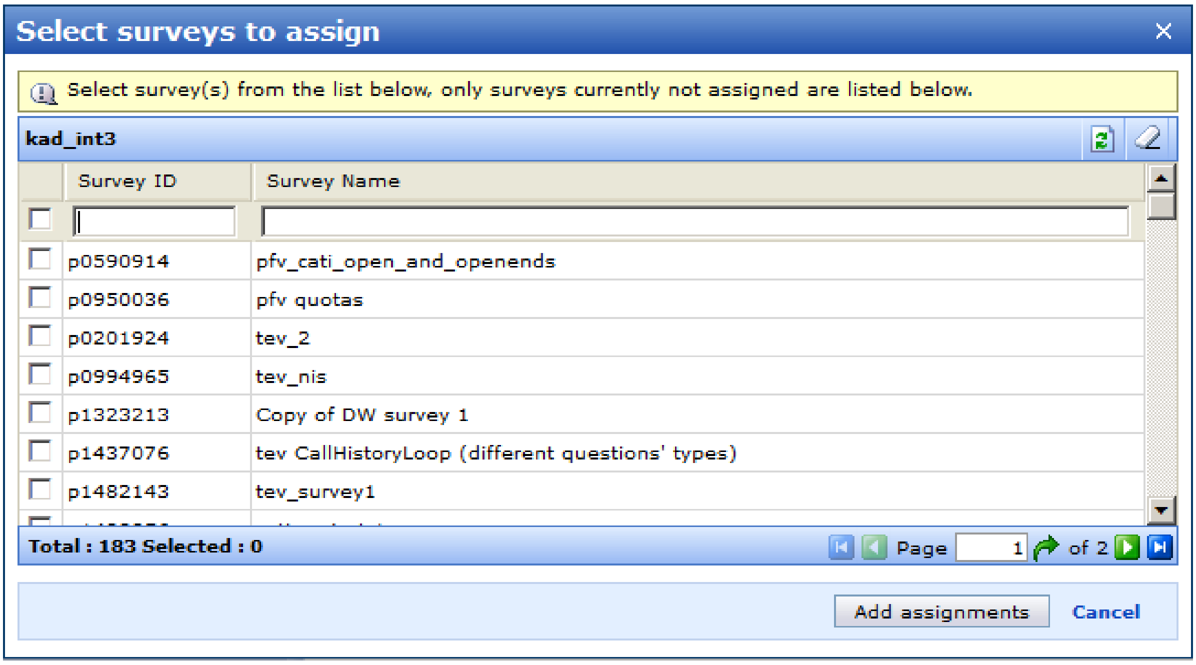


Figure 43 Selecting a survey to assign using the Select surveys to assign dialog window

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.

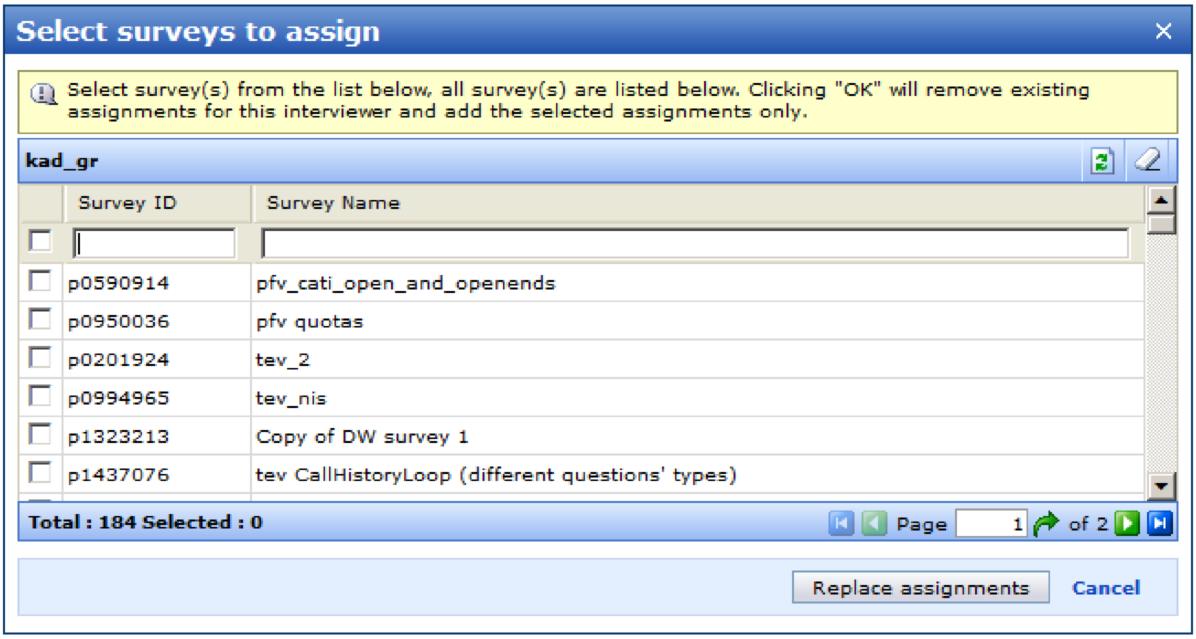


Figure 44 Selecting surveys to replace the existing assignment for an interviewer

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.

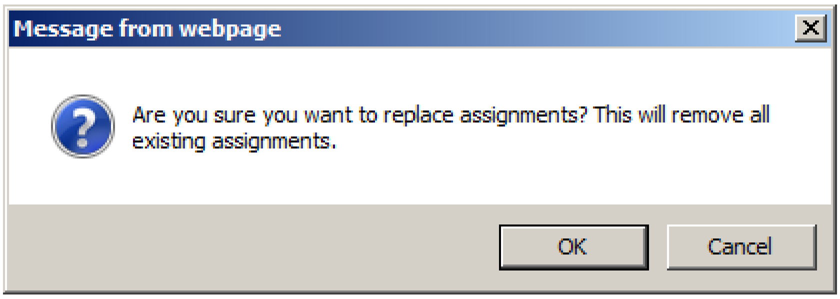


Figure 45 Warning message displayed on the attempt to execute the assignment replacement

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.

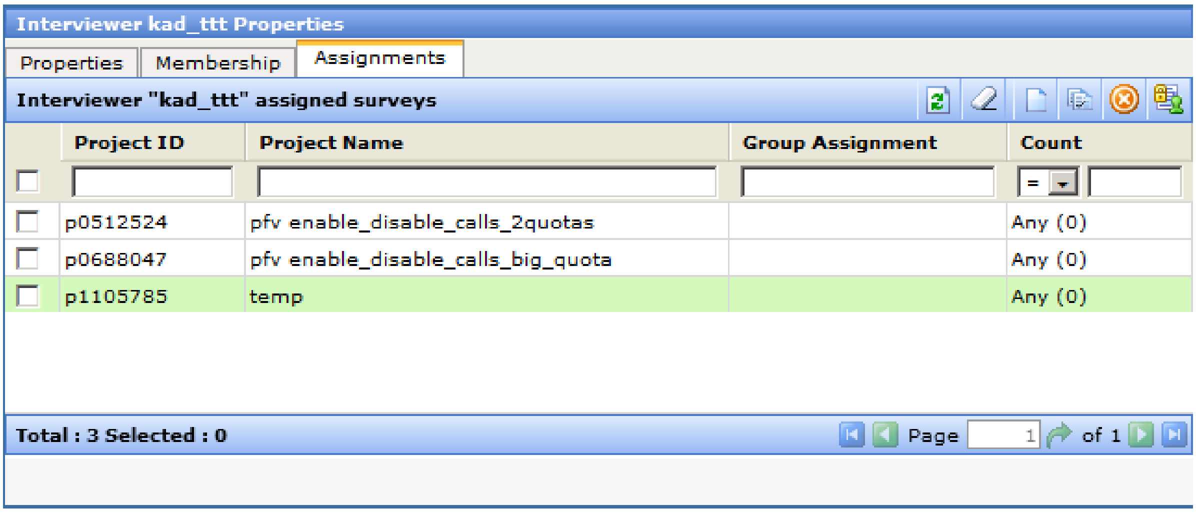


Figure 46 The Automatic Survey selected for the interviewer from the Assignments tab

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.

2.2.5 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 24 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.

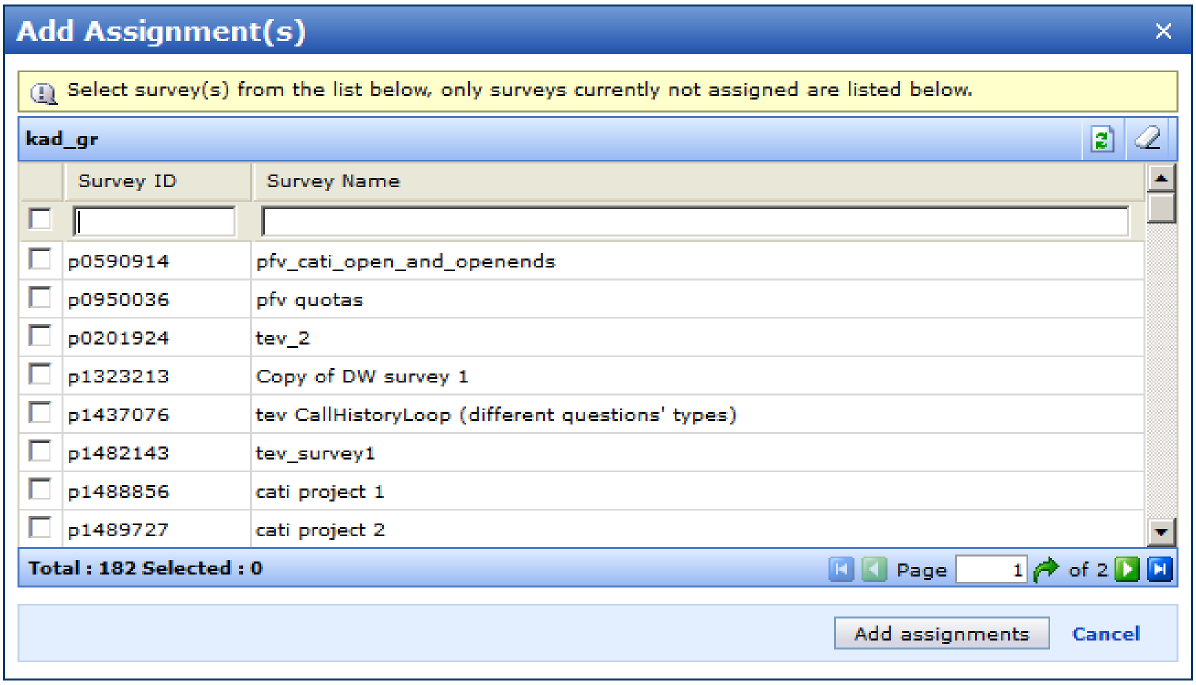


Figure 47 Selecting a survey to assign in the Add Assignment window

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. 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.

To replace an existing 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 24 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.

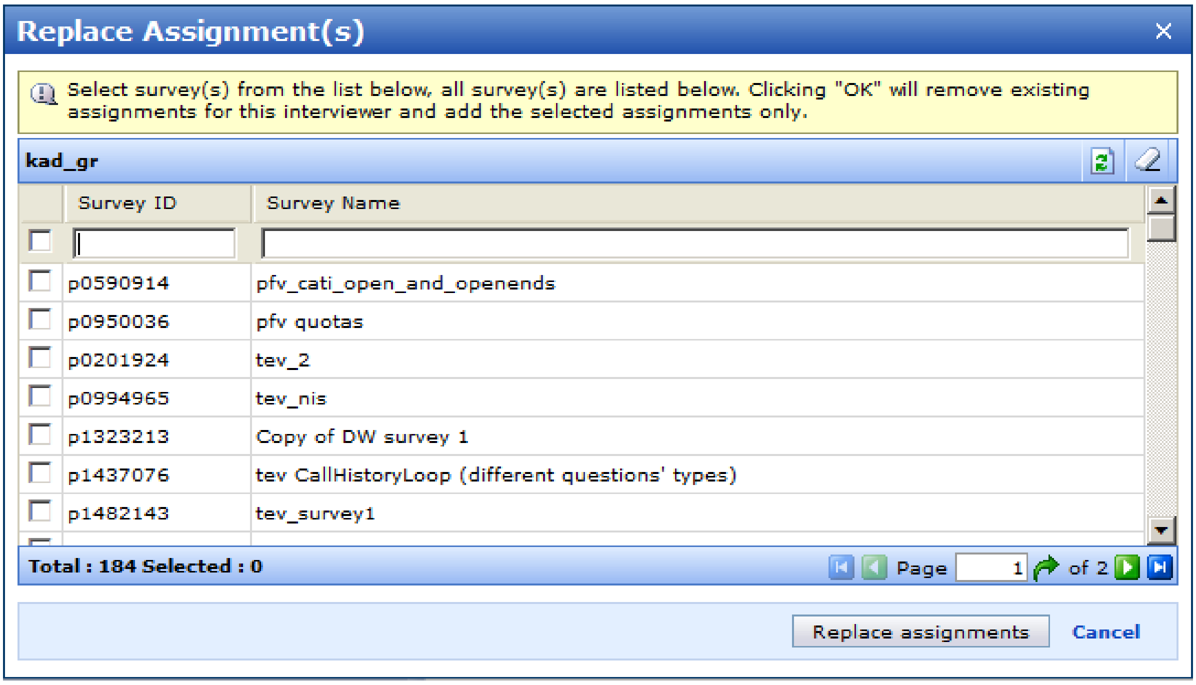


Figure 48 Selecting a survey to replace assignment in the Replace Assignment window

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. Press OK 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.

2.2.6 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 49 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 24 for instructions).
2. Press the Import button on the toolbar. This will display the Import dialog window.

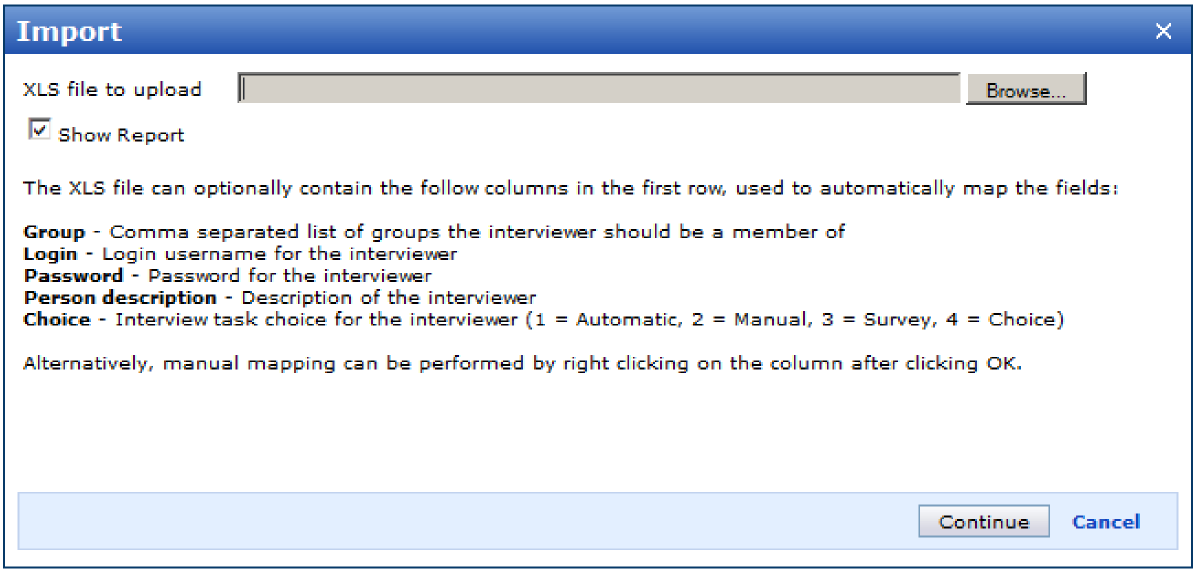


Figure 50 Importing the interviewer list from a file

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.
4. Check the Show Report box to generate a report regarding the import results – it will be generated after the successful import procedure finish and will contain details on the file contents and the destination group.
5. 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.
6. Press OK to start the import procedure.The list contained in the imported file is then opened in the Import dialog window.

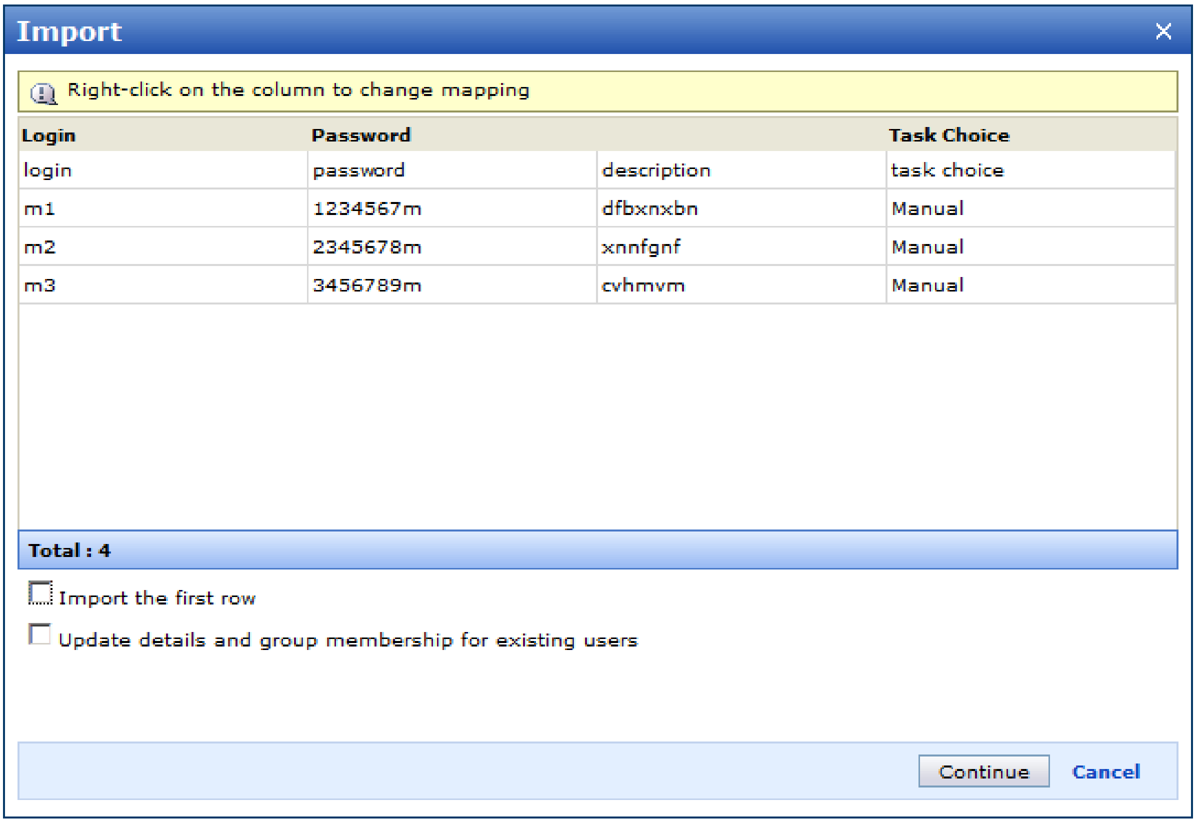


Figure 51 Importing the interviewer list from MS Excel file

Figure 52

7. You can decide whether or not you want to import the first table row. Check the Import the first row box if you want to import data contained in the first row cells and to use it as Login, Password, Description and Task Choice values.
8. The CATI Supervisor can automatically update info for the existing interviewers in cases where it encounters interviewers with names matching those specified in the Name column. To do this check the Update details and group membership for existing users box.
9. There is an option for changing the column role - right-click the required column cell in the Import dialog window and choose Choose column role from the context menu that appears. This will invoke the sub-menu.

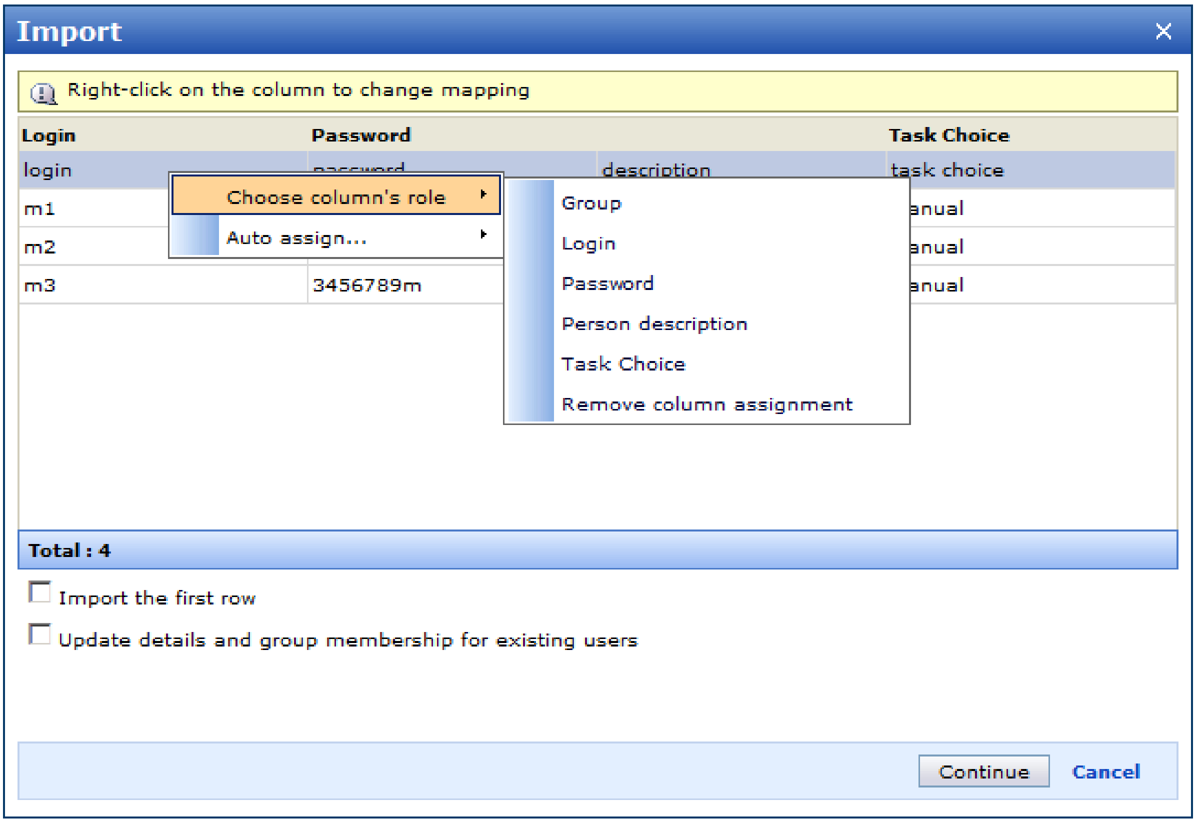


Figure 53 Assigning column roles to the imported table containing interviewer list

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

10. Right-click the required column cell in the Import dialog window and choose Auto Assign to assign column roles automatically based on:
    - Based on values from the first row – this option will use values from the header row to assign column roles;
    - Based on columns order – this option will create column role assignments automatically. In this case columns should stand ONLY in the following order - Group, Login, Password, Person Description, Task Choice. Mind that incorrect column order will result in mixing interviewer properties. The first row in this case should NOT contain column role names.
11. 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.

2.2.7 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 30 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 24 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.

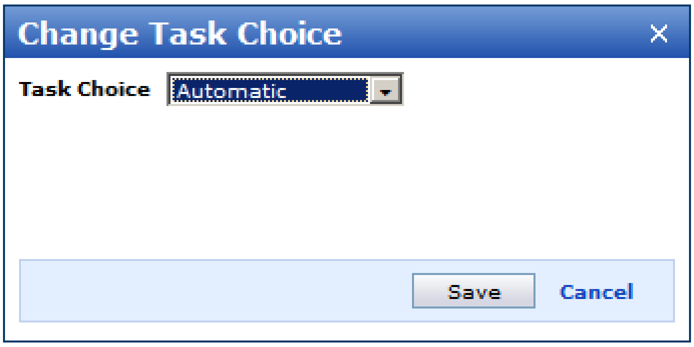


Figure 54 Changing the task choice mode for an interviewer in a dedicated dialog window

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).

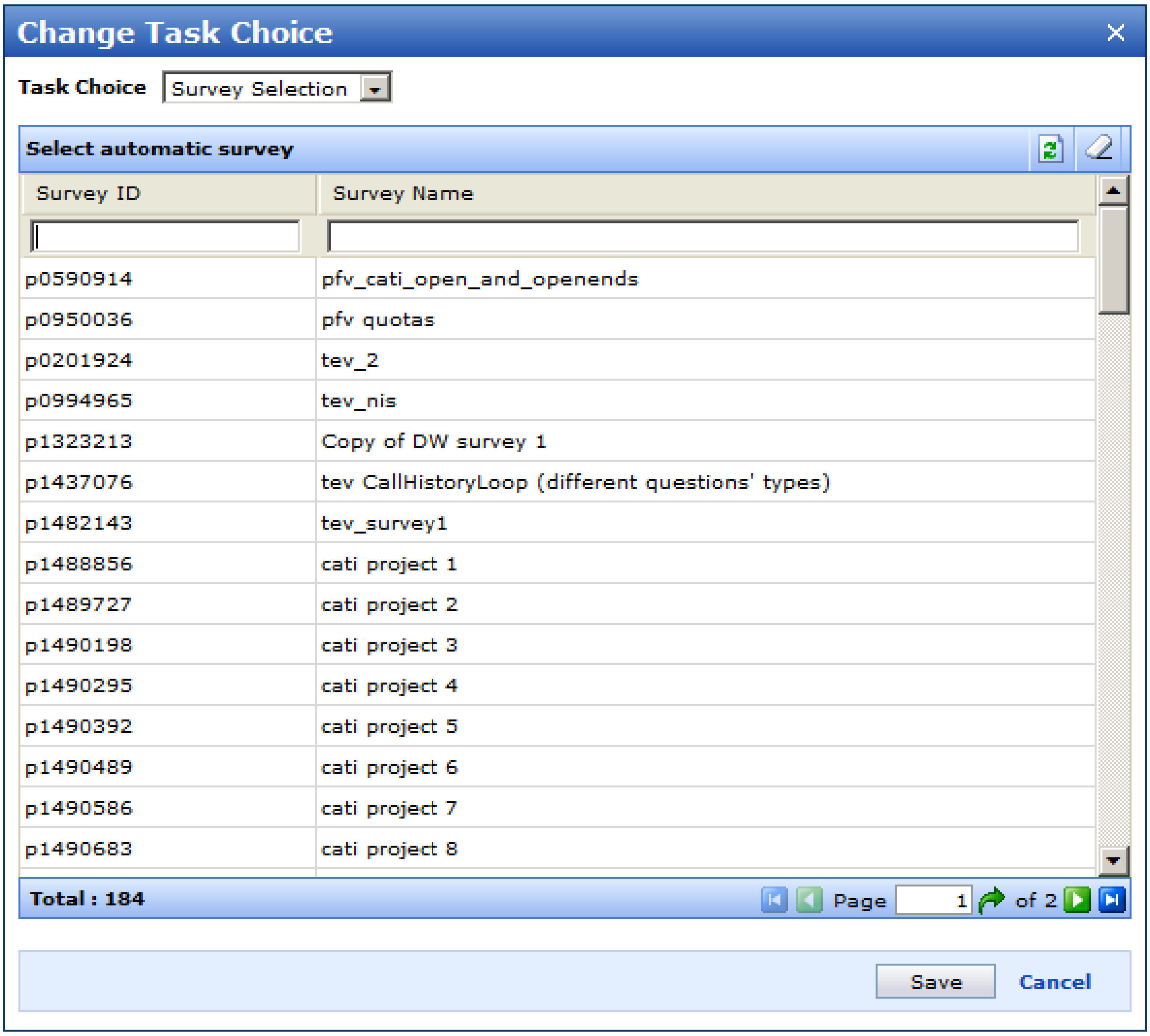


Figure 55 The Change Task Choice dialog window with the Survey Selection mode chosen

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).

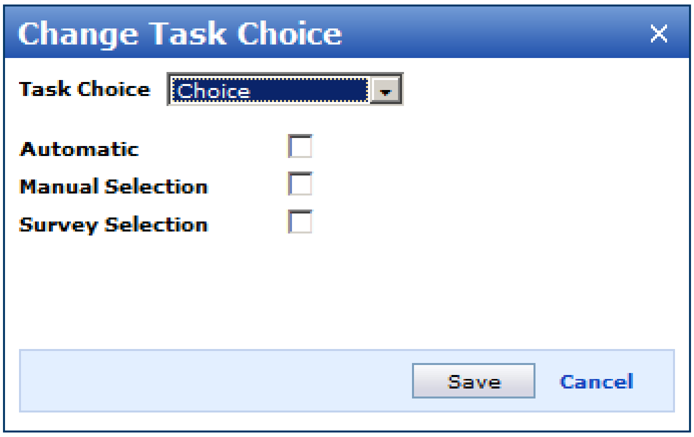


Figure 56 The Change Task Choice dialog window with the Choice mode chosen

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.

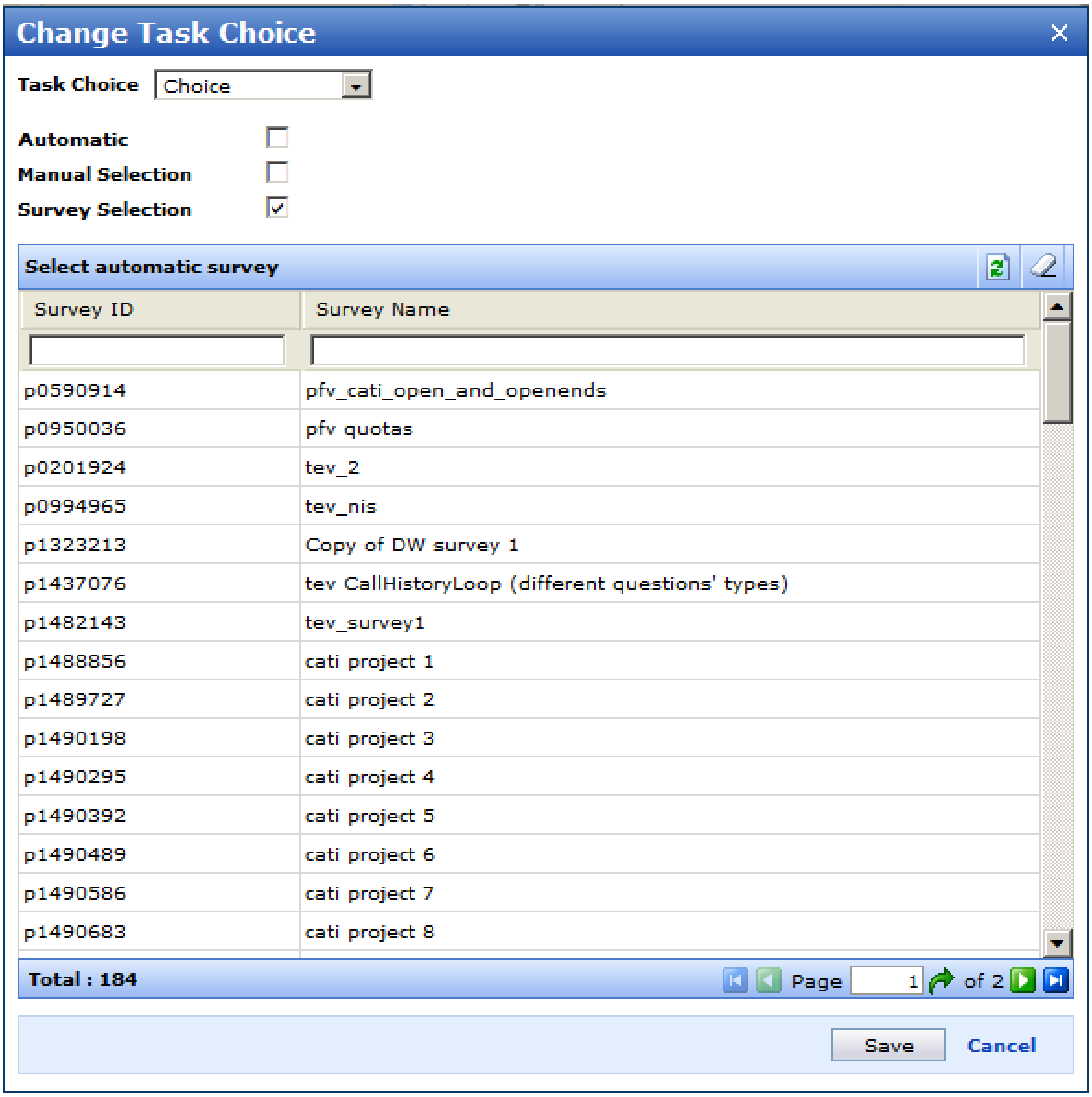


Figure 57 The Change Task Choice dialog window with the Choice mode chosen - configuring the Survey Selection mode

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.

2.2.8 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 30), in the New Interviewer dialog window (see Adding and deleting an interviewer on page 25), 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 24 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.

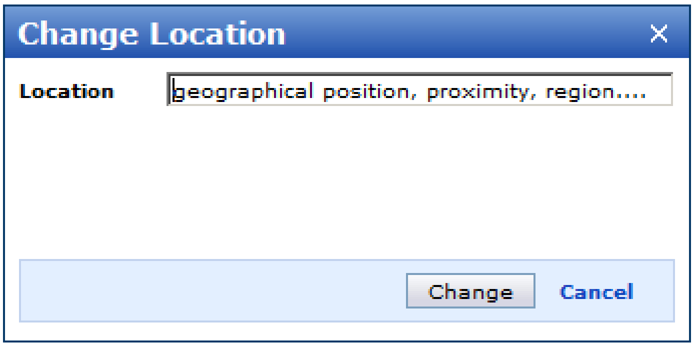


Figure 58 Changing the location attribute in the Change Location dialog window

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.

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.

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 interfaces when they are used for work with Survey objects.

3.1 Viewing the survey list

Whatever operation with the Survey object you need to perform you start with browsing the survey list.

To view the survey list:

1. Click on the Surveys object name in the left Navigation menu. This will reveal the All Surveys object name.
2. Double-click the All Surveys object group name in the left Navigation frame, or right-click its name 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.

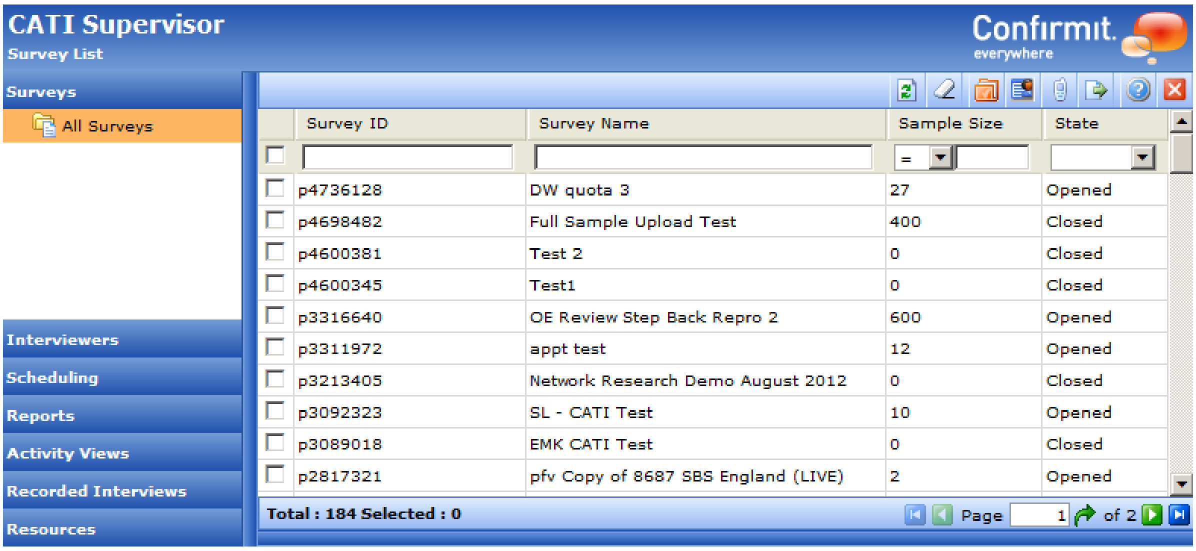


Figure 59 Viewing the survey list

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
	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 the previous page).

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.

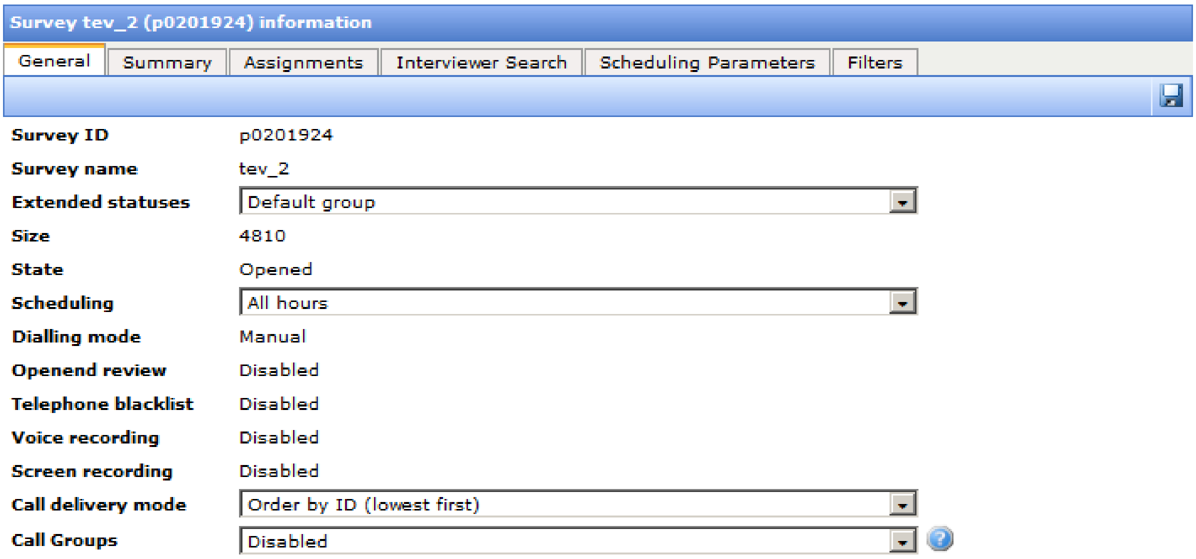


Figure 60 Survey properties displayed in the bottom right frame

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.

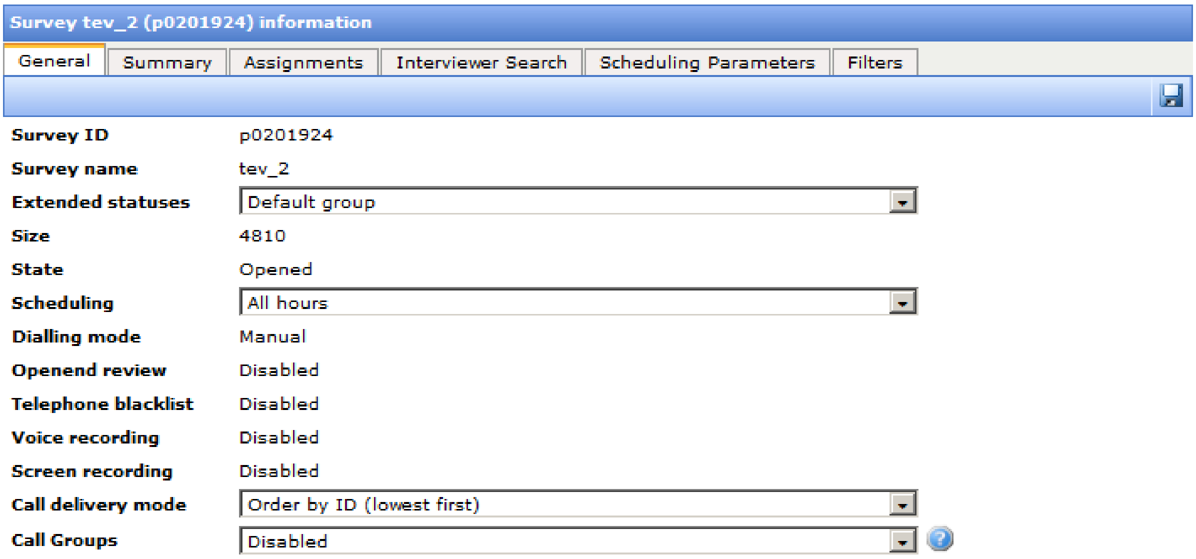


Figure 61 Survey properties - General tab

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 230. Every Extended Status group contains a customized set of Extended Status codes.

   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 the telephone number blacklist on page 248 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 222).

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 114 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 222).

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 165 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 **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 58 for complete description of the Quota Balancing settings and instructions on setting up of this option.

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 234 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.

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

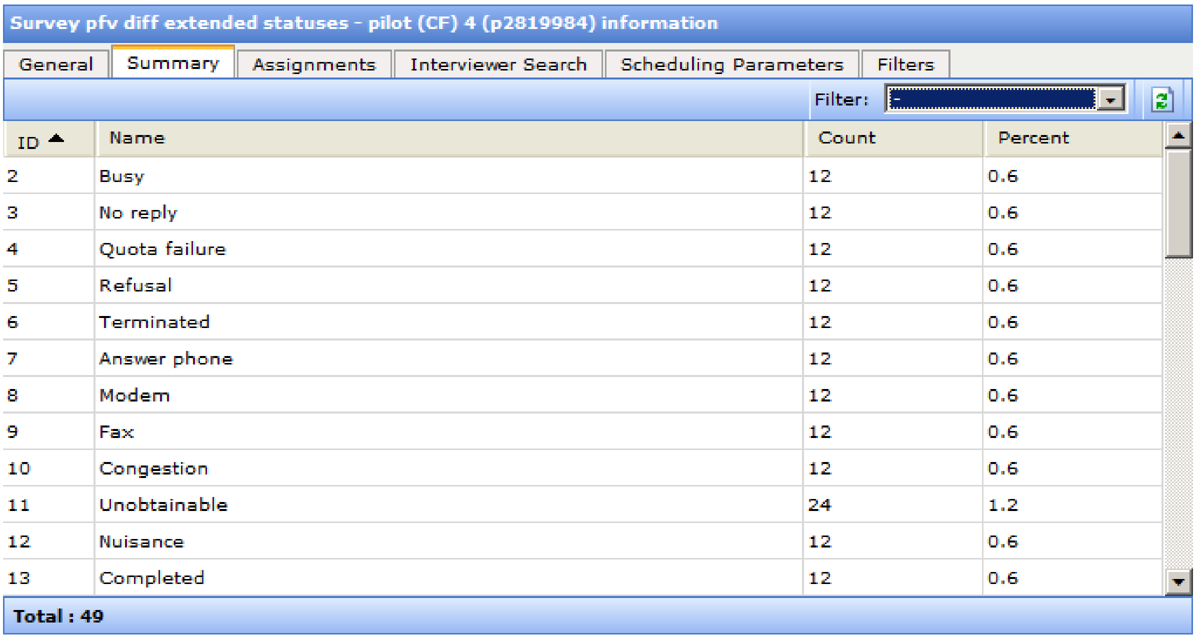
The Summary tab of the Survey Properties view presented in the bottom right frame contains information regarding the sample data available for each extended status.

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.


Survey pfv diff extended statuses - pilot (CF) 4 (p2819984) information

General | Summary | Assignments | Interviewer Search | Scheduling Parameters | Filters

Filter:

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

Total : 49

Figure 62 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 122 for this procedure description). You can also assign persons and groups directly to the survey you select in the Survey List (see Making assignments for a selected survey on page 120 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.

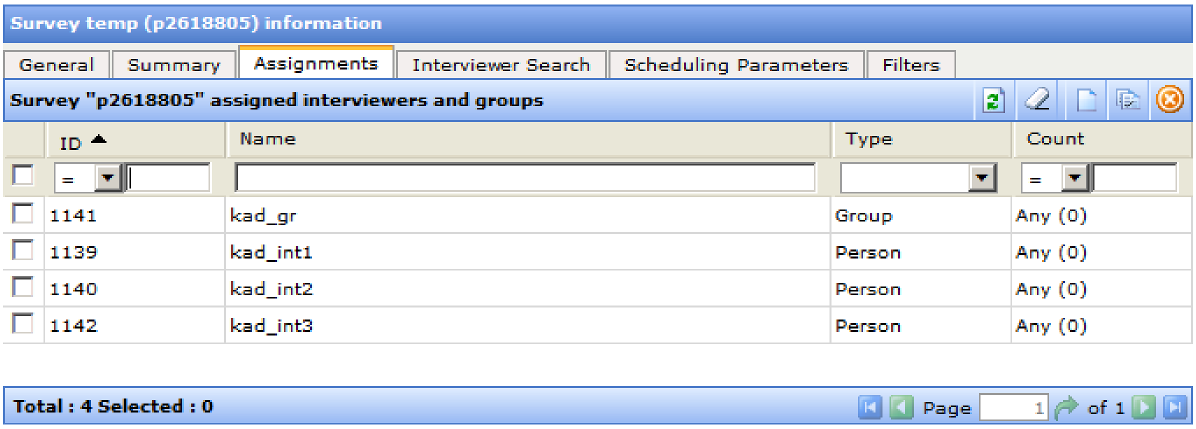


Figure 63 Survey properties - Assignments tab

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.
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.

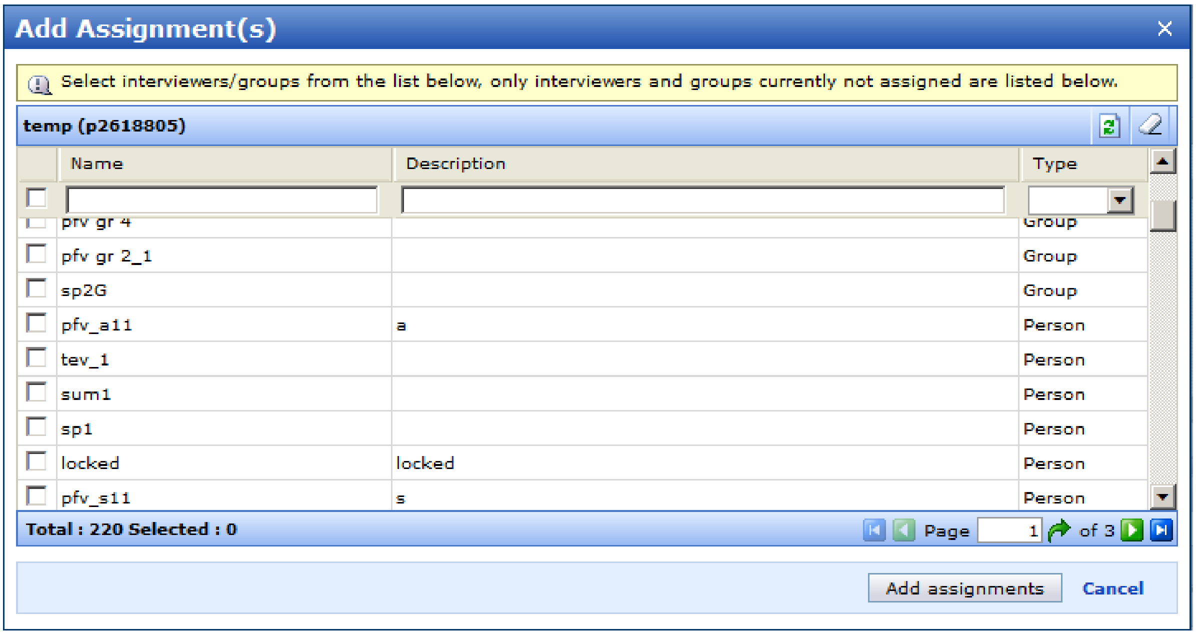


Figure 64 Assign to survey dialog window

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 at once with the 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.

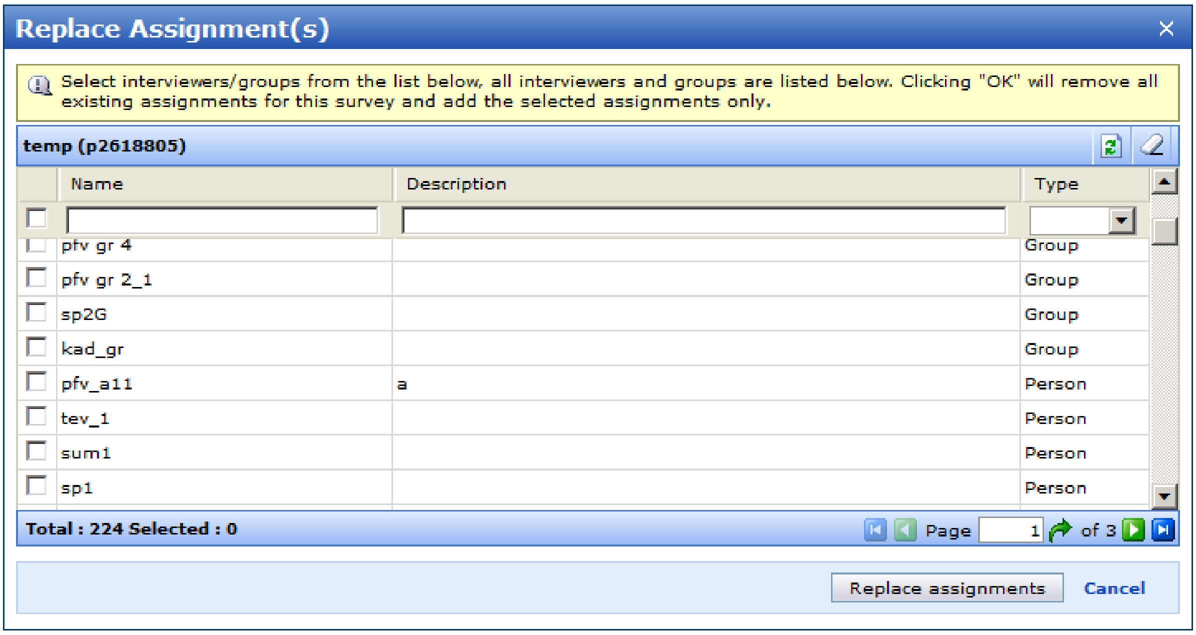


Figure 65 Replace survey assignments dialog window

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.

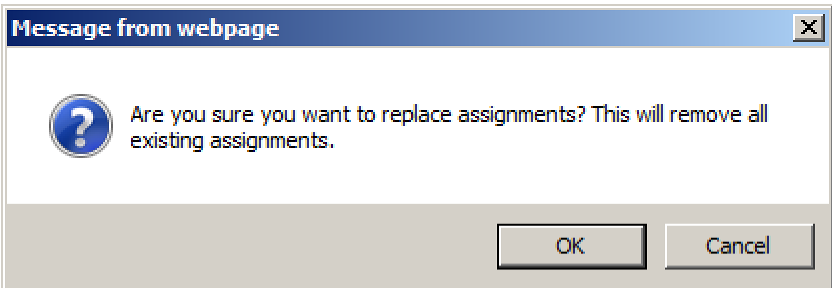


Figure 66 Warning message displayed on the attempt to execute the assignment replacement

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 Making assignments for a selected survey on page 120).

3.3.4 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 64 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 52). 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 61).

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 50 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 52).

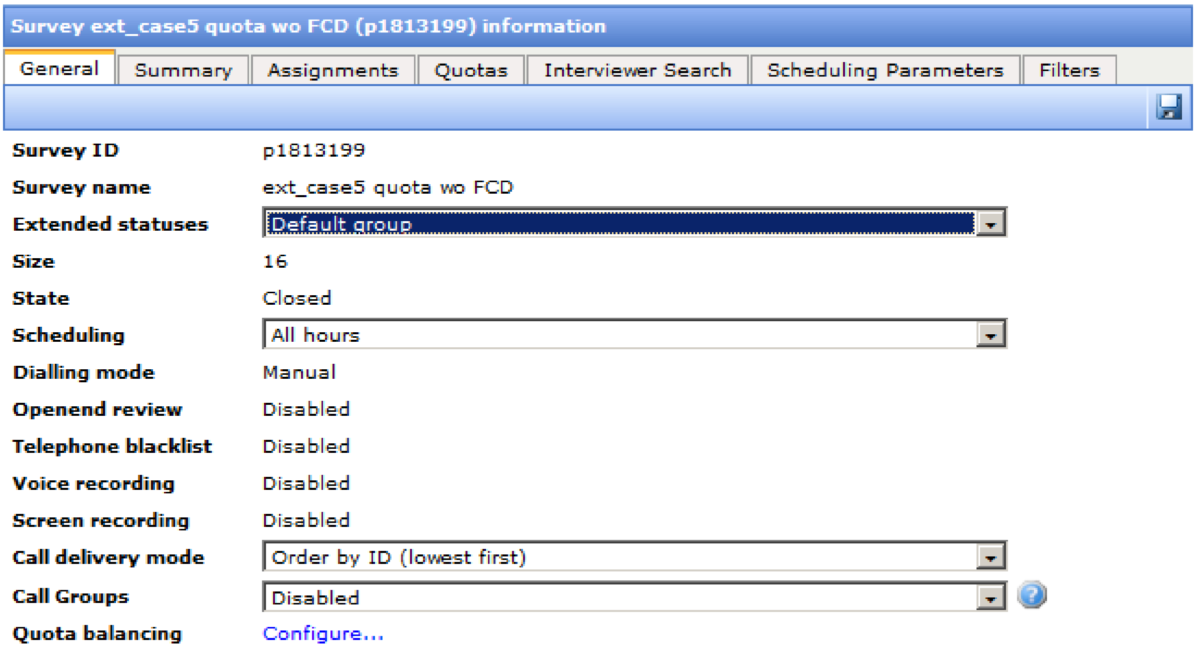


Figure 67 Choosing the Configure link for the Quota Balancing option

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.

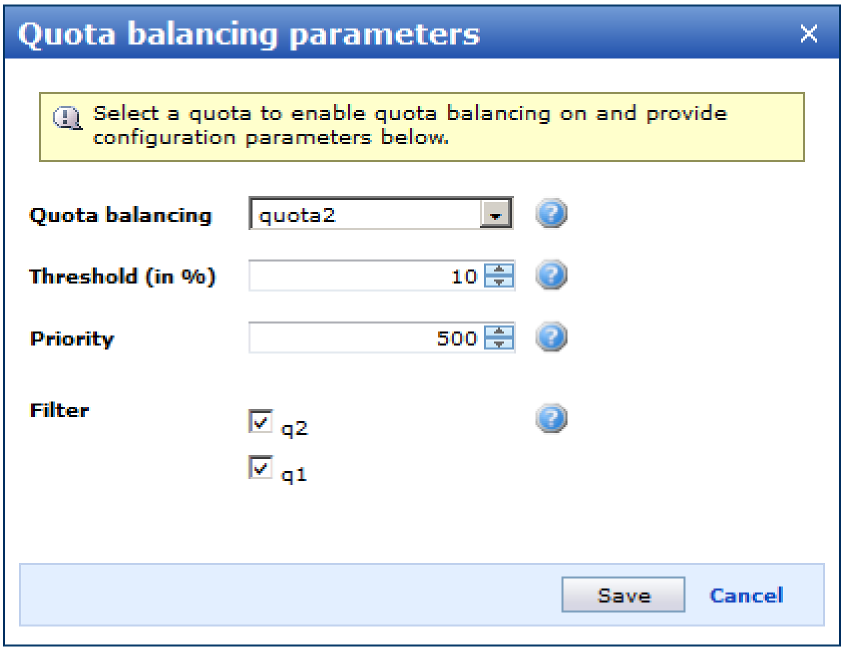


Figure 68 Specifying the Quota Balancing settings

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).

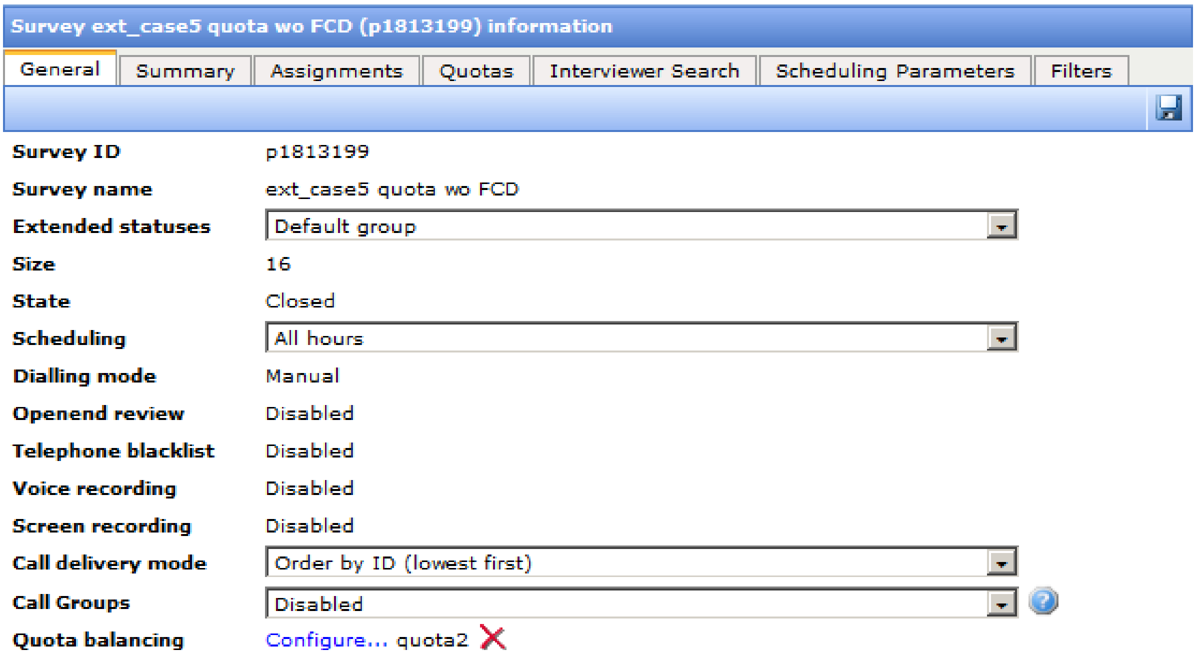


Figure 69 The General tab showing that Quota Balancing parameters are set

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 61 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.

3.3.5 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 58 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 49).
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.

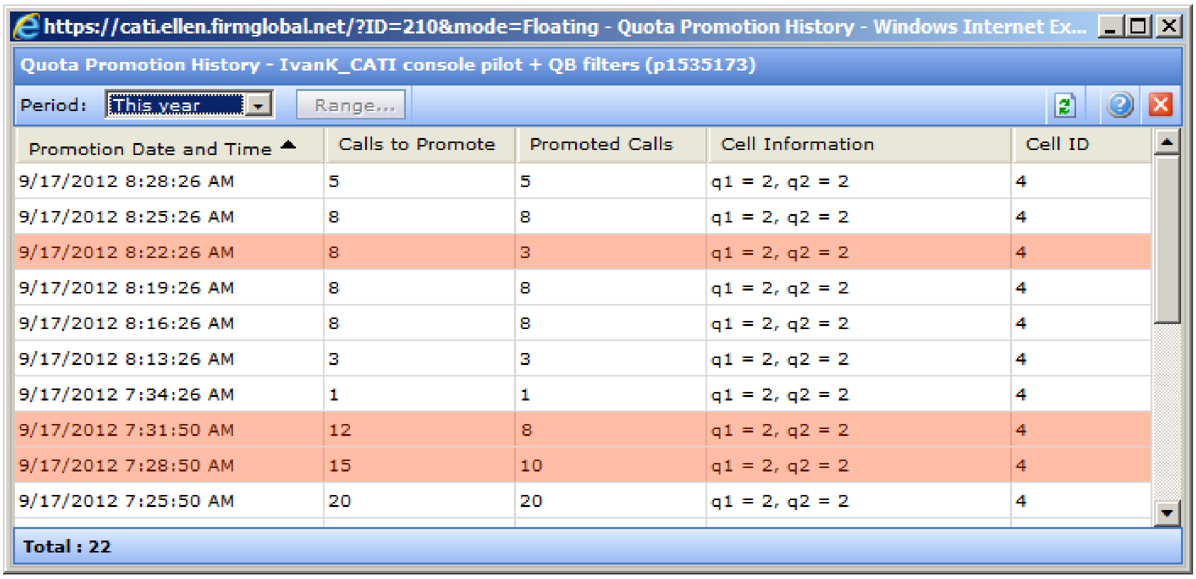


Figure 70 Viewing the quota promotion history

   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.

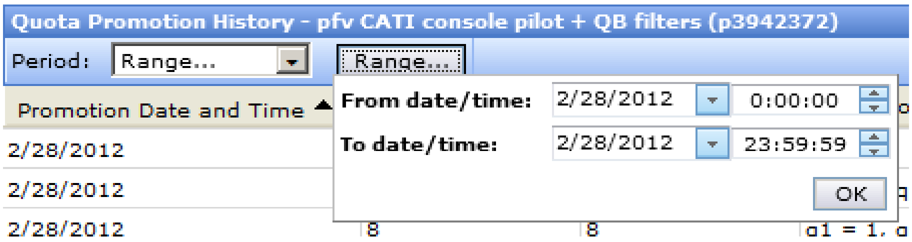


Figure 71 Choosing the particular time range to show the quota promotion history for

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.

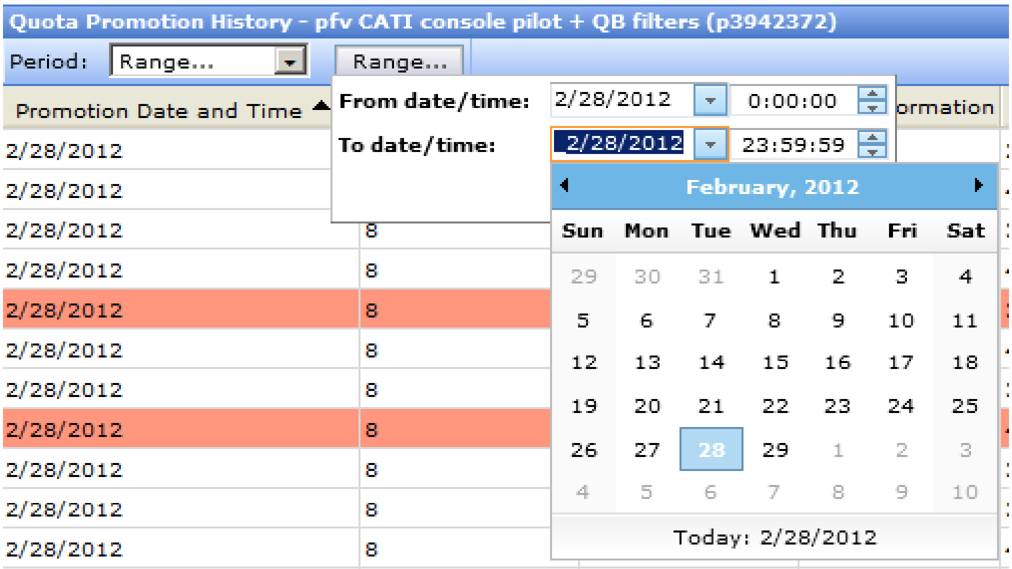


Figure 72 Choosing the date with the help of the calendar form

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.

3.3.6 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.

3.3.7 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 65);
- activating interviews/calls which fall into certain quota cells (see Activating interviews which fall into certain quota cells on page 67);
- enabling interviews/calls which fall into certain quota cells (see Enabling calls which fall into certain quota cells on page 68);
- disabling interviews/calls which fall into certain quota cells (see Disabling calls which fall into certain quota cells on page 69).

For description of the Activate, Disable and Enable actions please refer to Activating an interview on page 106 and Disabling and enabling calls on page 92. 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 70).

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 58 for details.

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.

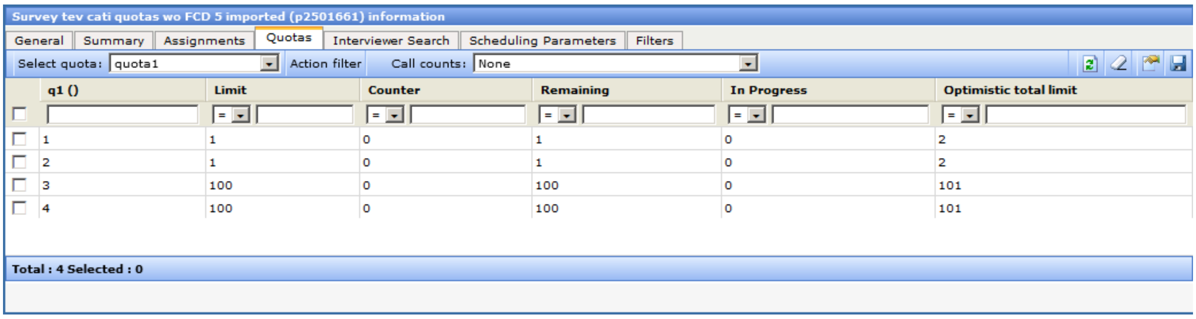


Figure 73 Survey properties - Quotas tab

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:

- the particular question answer (or a number of answers in case of a compound quota, one answer per column) defined in the quota,
- the Limit (the threshold amount of calls which should not be exceeded),
- the Counter value (the current amount of completed calls for this target),
- the Remaining amount of calls (which can still be made for this target),
- 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 quota limit (the Optimistic quota limit column is displayed only in case an optimistic quota limit was specified when the Quota was set up in Confirmit Authoring module)
- and also you have an option of displaying an extra column which is called "Call counts" (see description below).

4. 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 three filters available: 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.

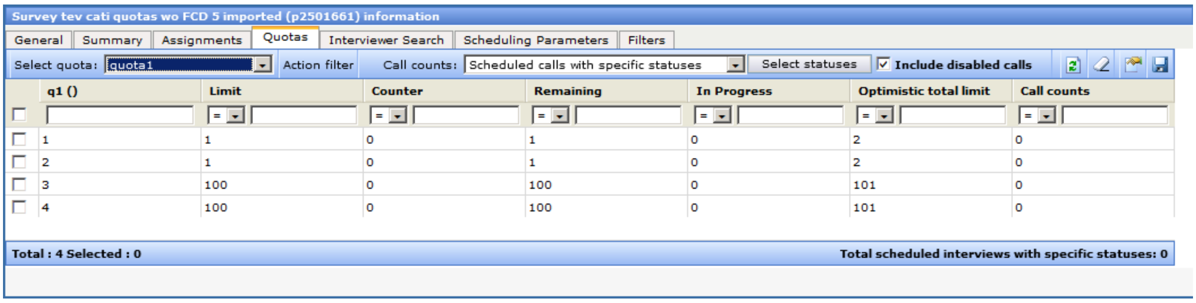


Figure 74 Quotas tab displaying the Call counts column

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.

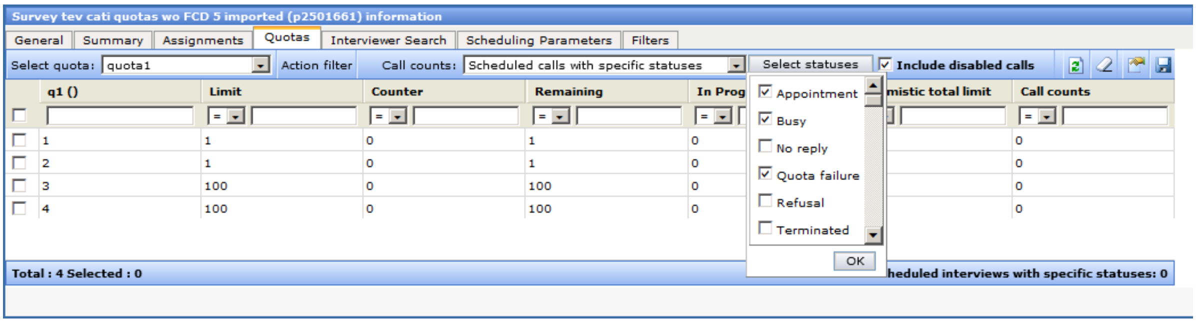


Figure 75 Selecting statuses to configure the filter for the Call counts counter

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 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 frame bottom 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.

5. You can change the limit for any selected quota cell, or simultaneously for all quota cells defined for the currently selected quota.
6. To change the quota cell limit you should right-click the desired quota cell (or a number of cells) in the grid and choose Change Limit from the context menu that appears. Or you can select the desired quota cell (or a number of cells) in the grid, and press the Change limit button in the frame toolbar.
7. Any of these actions will display the Change Limit dialog window.

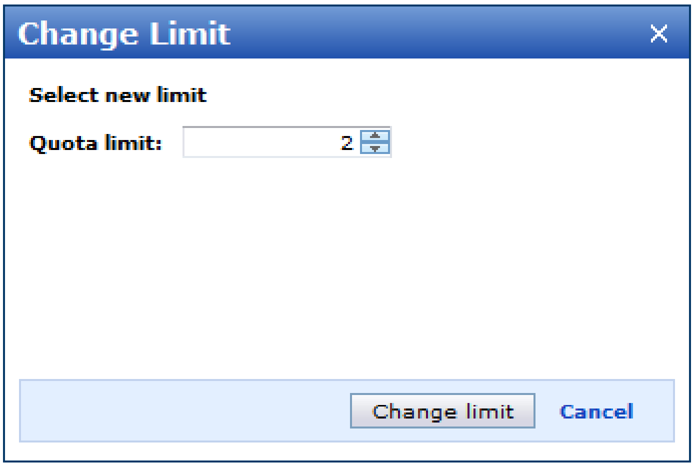


Figure 76 Changing limit for a quota target

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

8. At any time you can press the Refresh button in the frame toolbar to check the latest values for ALL counters.

9. Do not forget to press the Update button on the Quotas tab toolbar upon changing the limit value for any quota cell. If you change the limit value the CATI Supervisor module will instantly warn you by displaying the Warning sign in the frame toolbar - hover the mouse pointer over the sign, and the tooltip will ask you to apply the changes you have made; press the Update button to do this.

Figure 77 Warning message displayed when the quota limit is changed

Activating interviews which fall into certain quota cells

Please refer to Activating an interview on page 106 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 70 for instructions).

1. Display the Quotas tab in the bottom right frame (see Viewing and modifying survey quota settings on page 65 for instructions).
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 on page 106 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 on page 106 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 92 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 70 for instructions).

1. Display the Quotas tab in the bottom right frame (see Viewing and modifying survey quota settings on page 65 for instructions).
2. Select the required quota cells in the grid in the Quotas tab, then right-click the selection and choose Enable from the context menu that appears. This will display the following confirmation message.

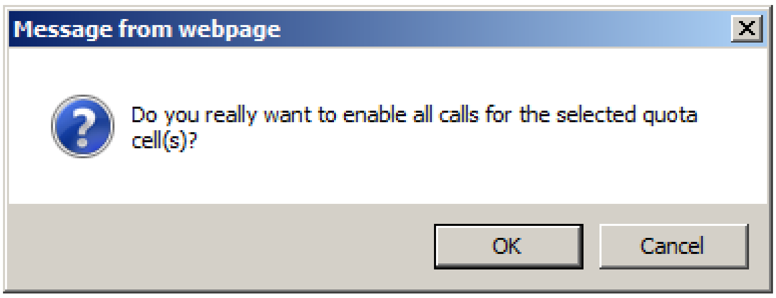


Figure 78 Confirmation prompt displayed when the Enable action is started

   Press OK to proceed.
3. The Enable calls in selected quota cells dialog box is displayed then.

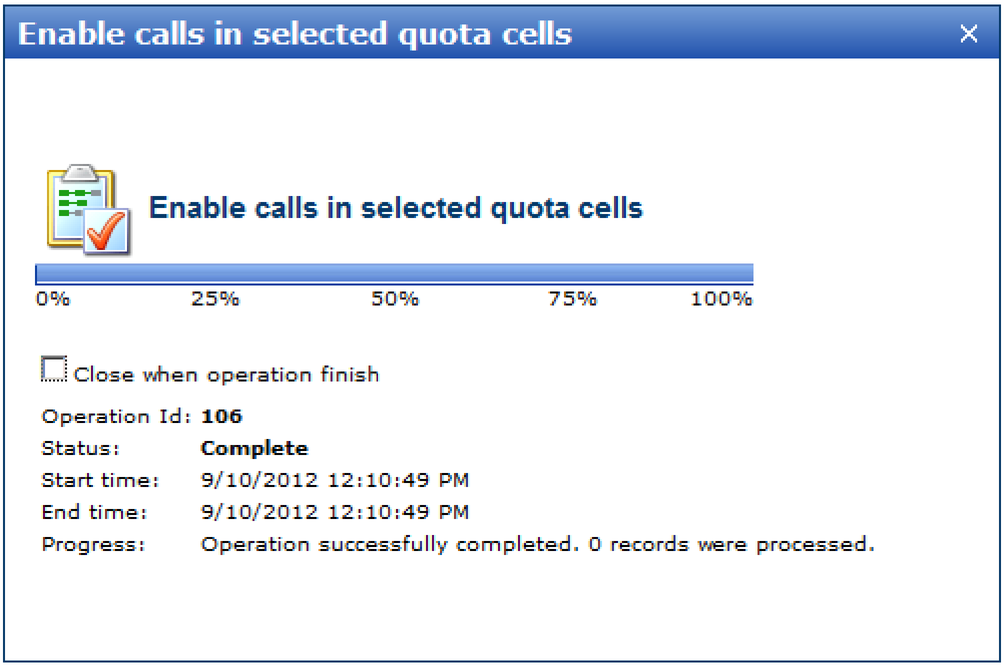


Figure 79 Enable selected calls dialog box

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 on page 106 for description of this dialog box.

4. When it is run from the Quotas tab, the Enable 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 70 for instructions).
5. Check the outcome of the Enable operation - it is indicated in the Progress field. In case of the partial, or unsuccessful outcome follow the instructions contained in Activating an interview on page 106.

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 92 for more details on the Disable action.

When it is run from the Quotas tab, the Disable 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 70 for instructions).

1. Display the Quotas tab in the bottom right frame (see Viewing and modifying survey quota settings on page 65 for instructions).
2. Select the required quota cells in the grid in the Quotas tab, then right-click the selection and choose Enable from the context menu that appears. This will display the following confirmation message.

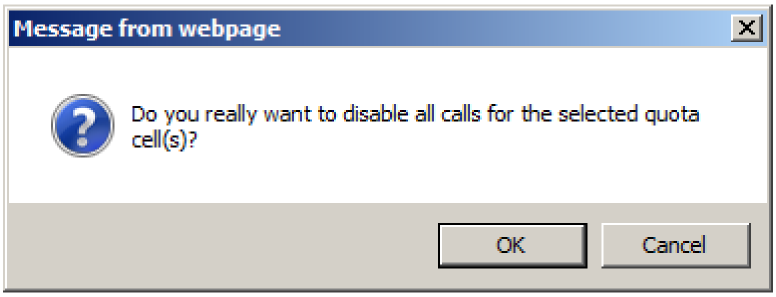


Figure 80 Confirmation prompt displayed when the Disable action is started

Press OK to proceed.

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

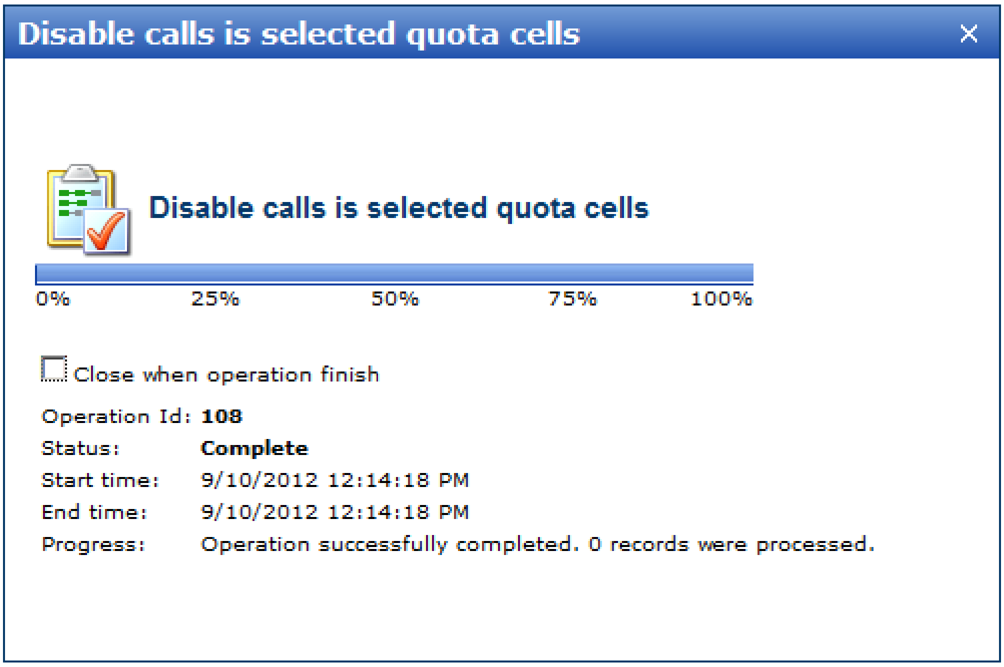


Figure 81 Disable selected calls dialog box

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 on page 106 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 70 for instructions).

5. 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 on page 106.

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 65 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.

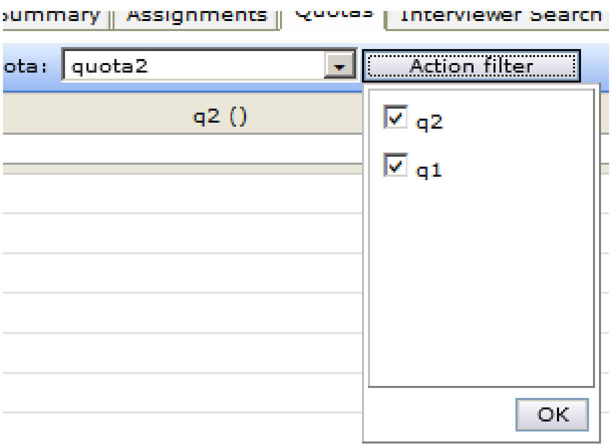


Figure 82 Action filter setup form

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 65 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 65 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 65 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.

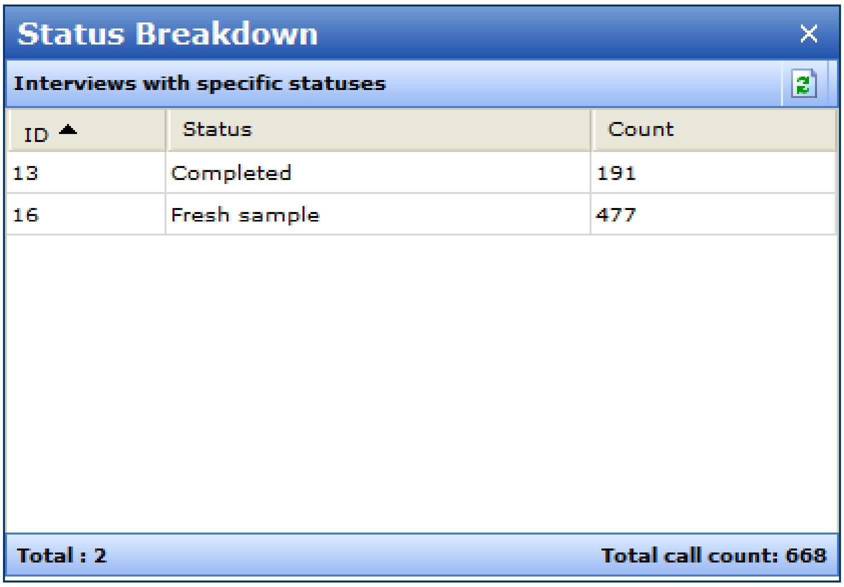


Figure 83 Viewing the Status Breakdown information for a quota cell

   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.

3.3.8 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 to the parameter set which is displayed in the interview list in the Interviewer Console by default (see Manual Selection mode on page 168 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 168).

These added 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 have added to this parameter set.

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.

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).
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 52).
3. Change to the Interviewer Search tab. Please note that this tab becomes available only after at least one question has been marked as "Available as CATI filter" in Confirmit Authoring.

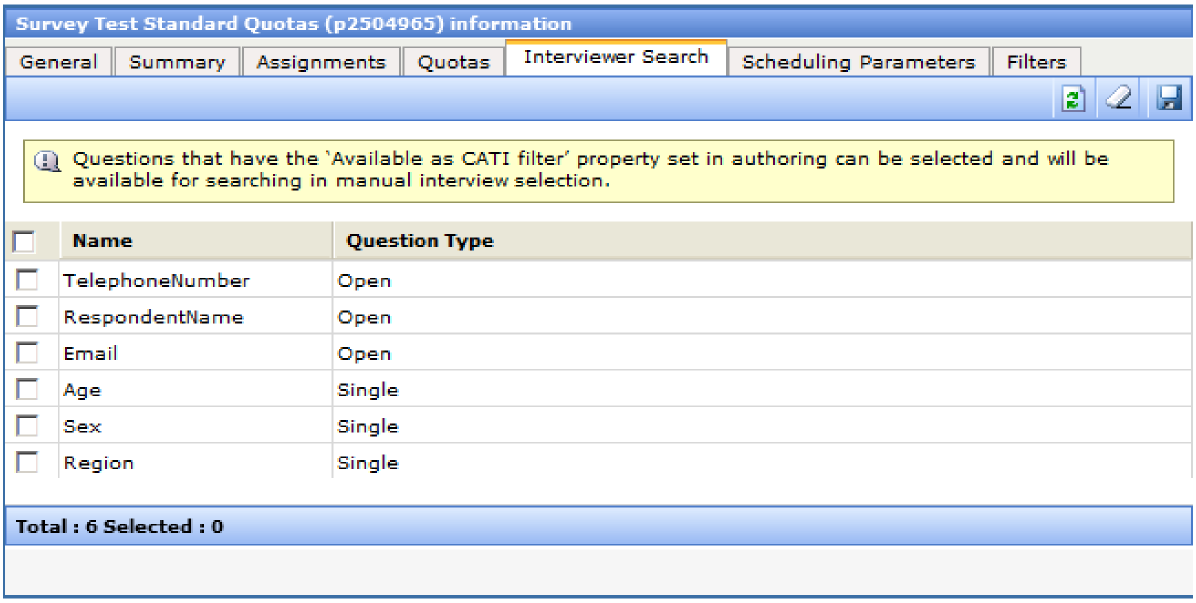


Figure 84 Viewing the Interviewer Search tab contents

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.
5. 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.

   If you the current survey view without saving changes you will lose all the changes you have made since the last save. So when you try leaving the page while the Save button flashes, CATI Supervisor prompts you by displaying the warning message.

Figure 85

Press ... to leave the page without saving (changes are lost in this case), or press ... to close the dialog and continue working with the current survey view.

3.3.9 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 142 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.

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 142

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.

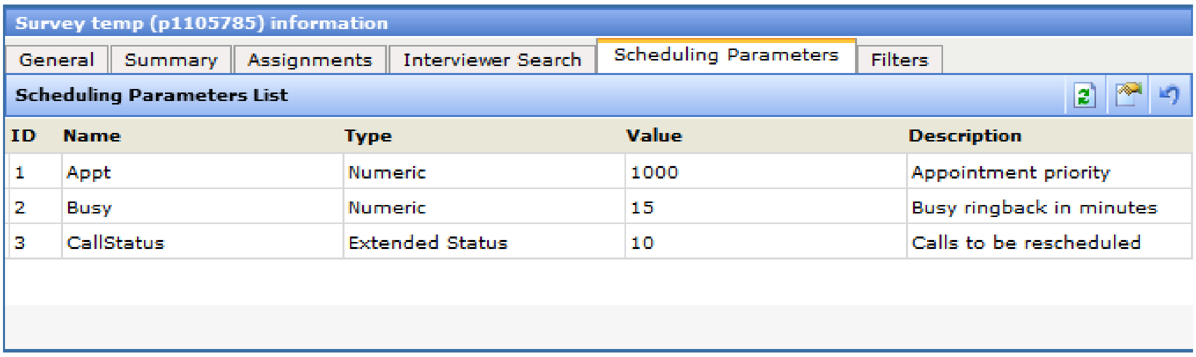


Figure 86 Viewing the parameter settings of the scheduling script currently used with the survey

   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.

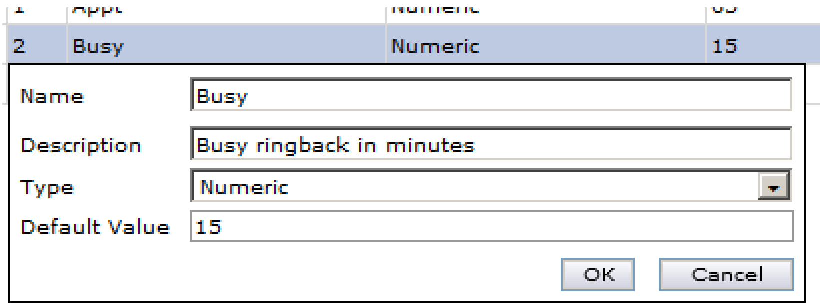


Figure 87 Editing scheduling script parameter from the Scheduling Parameters tab

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 142 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 142 for explanation).

3.3.10 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 52).
2. Change to the Dialer settings tab.

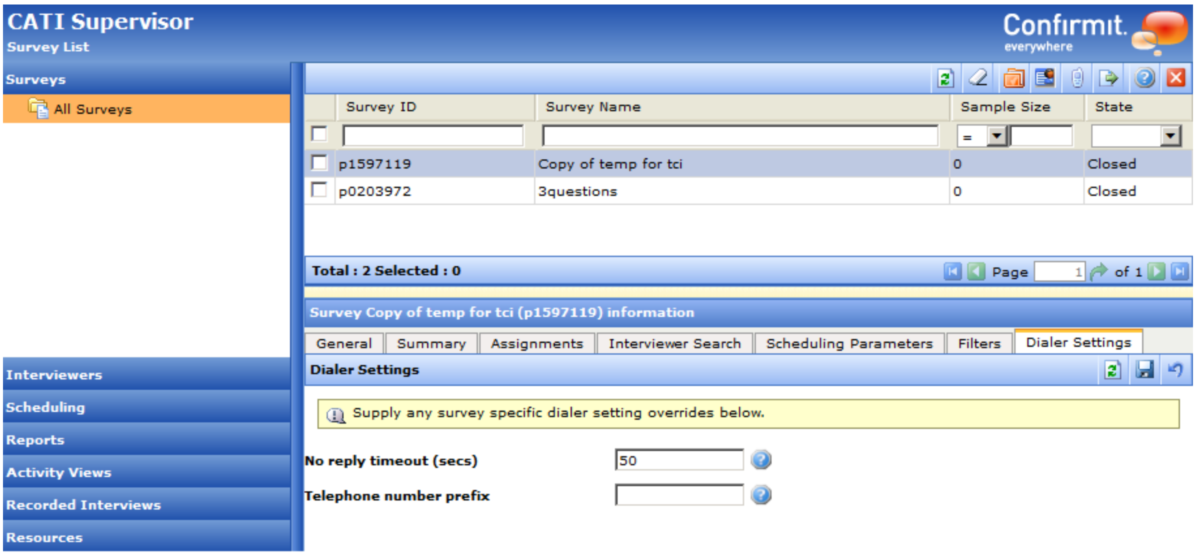


Figure 88 Configuring the survey related dialer settings for the TCI dialer

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

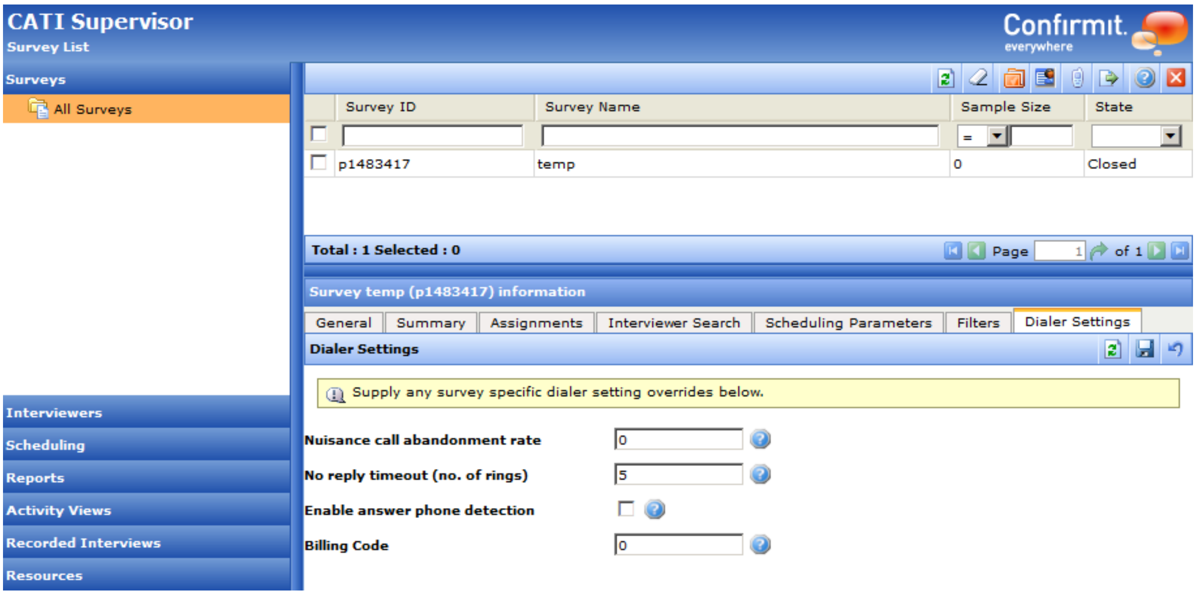


Figure 89 Configuring the survey related dialer settings for the Pro-T-S dialer

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 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%)

- 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 Enabling and configuring the Dialer on page 244 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.

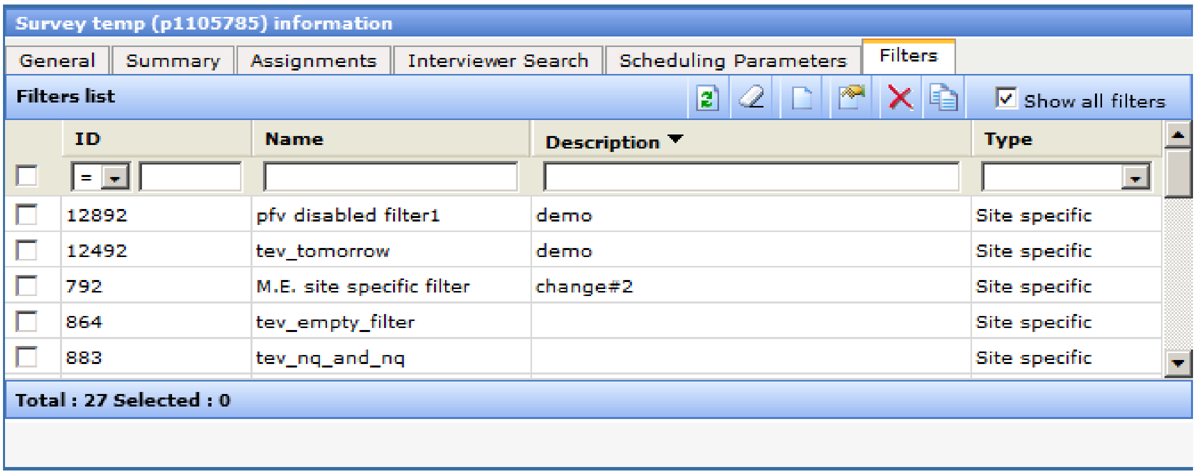


Figure 90 Survey properties - Filters tab

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 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.

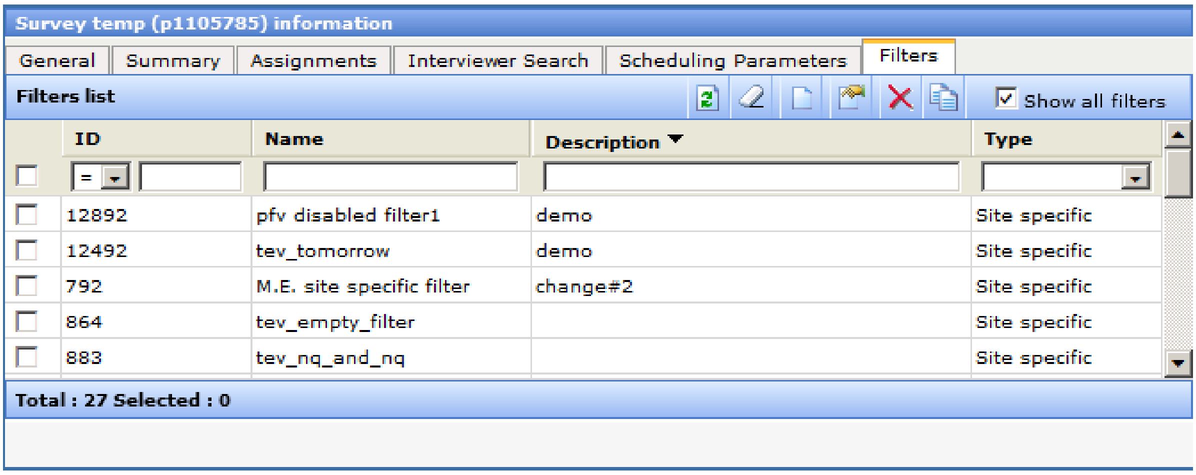


Figure 91 Survey properties - Filters tab

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.

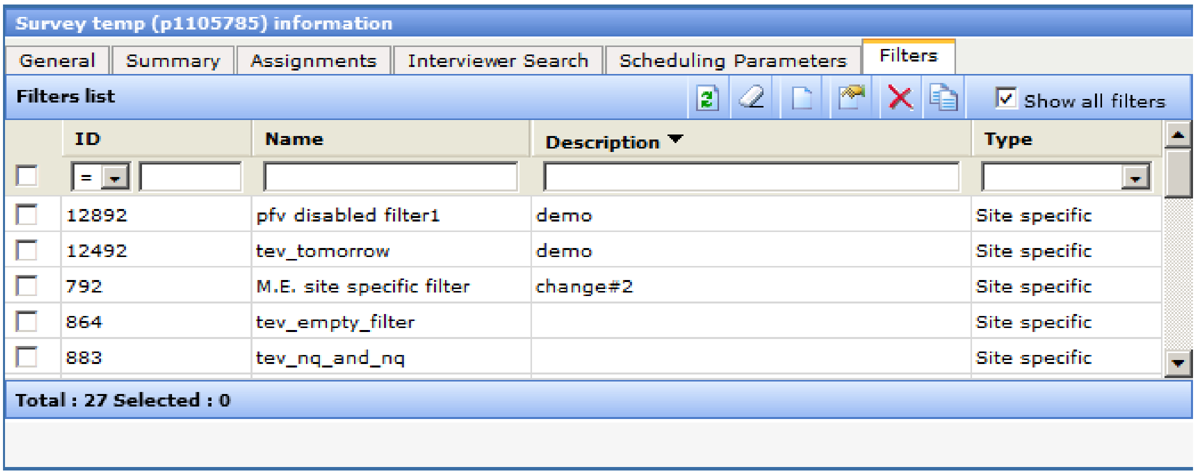


Figure 92 Survey properties - Filters tab

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.

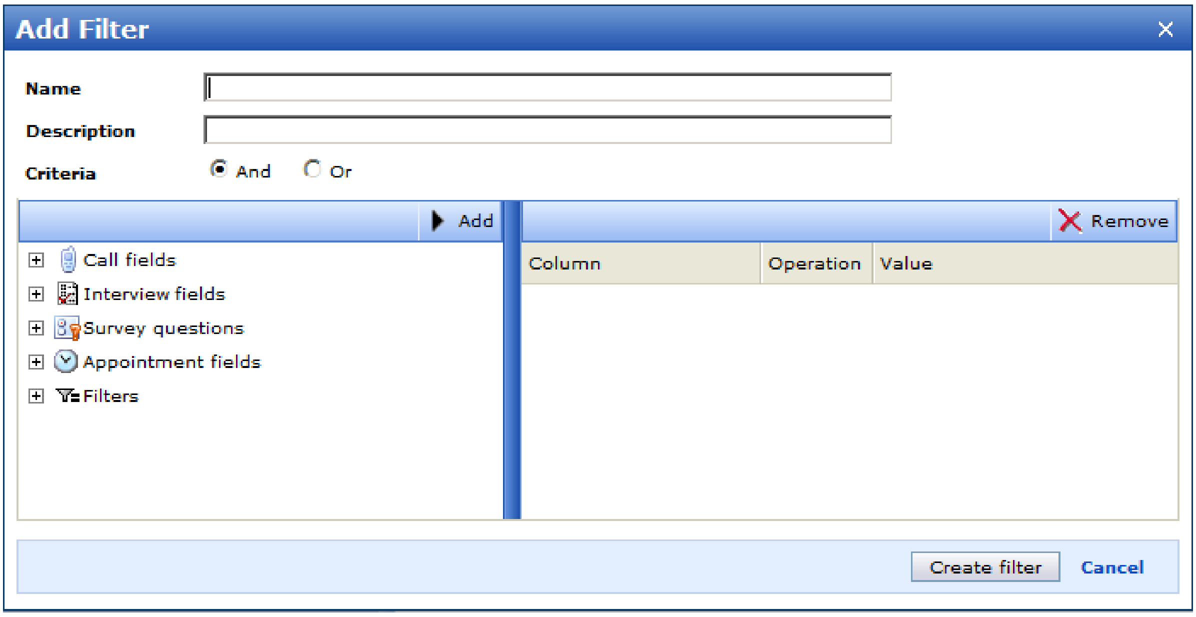


Figure 93 The Filter dialog window (empty)

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.

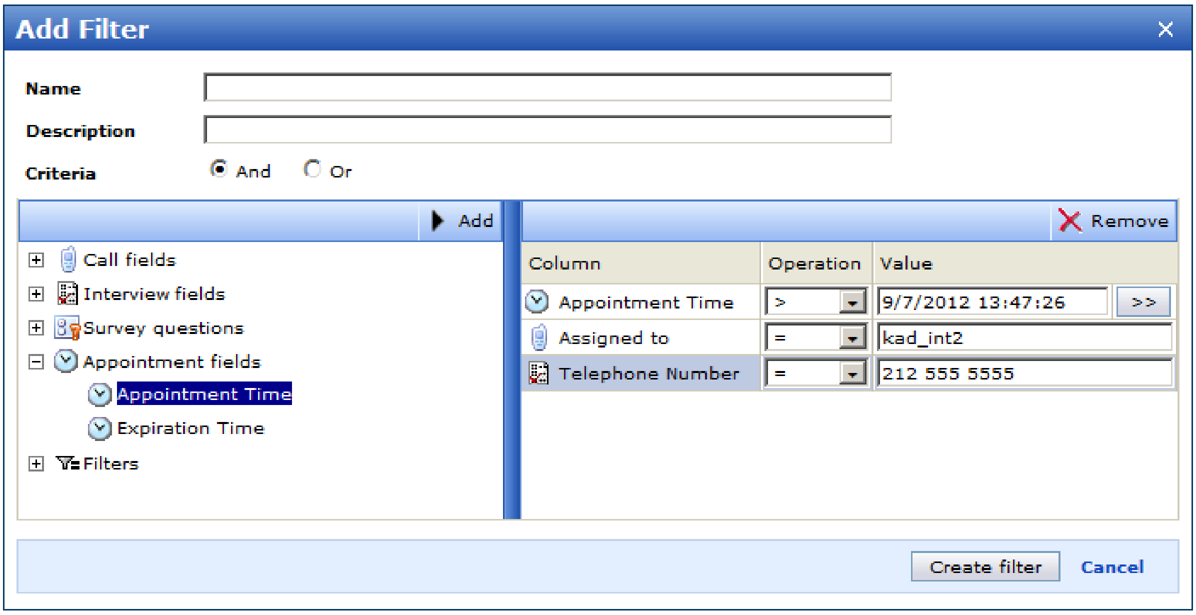
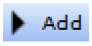


Figure 94 The Filter dialog window containing filter parameters

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.

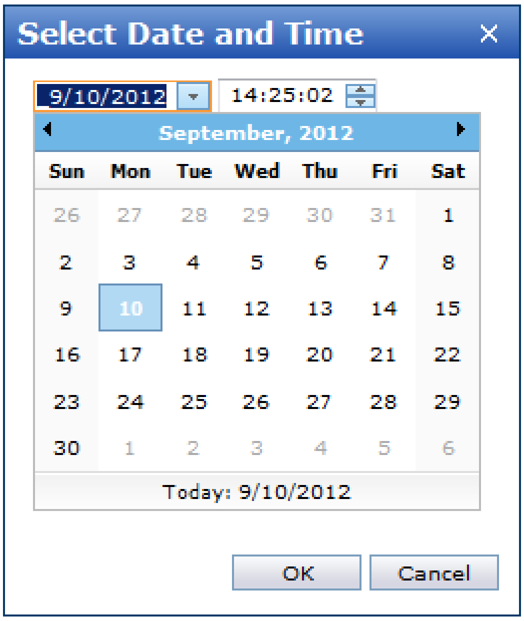


Figure 95 The Date/Time dialog window

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.

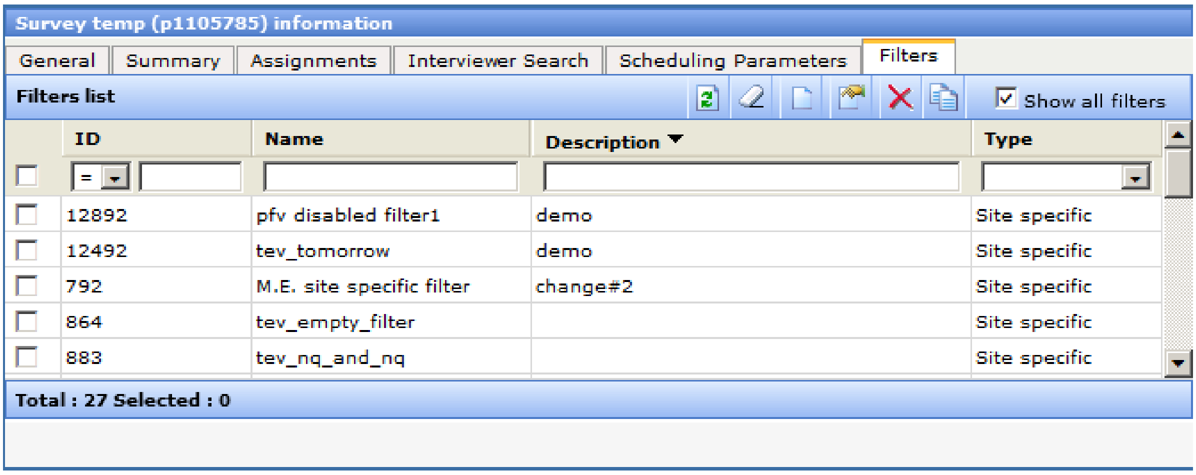


Figure 96 Survey properties - Filters tab

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.

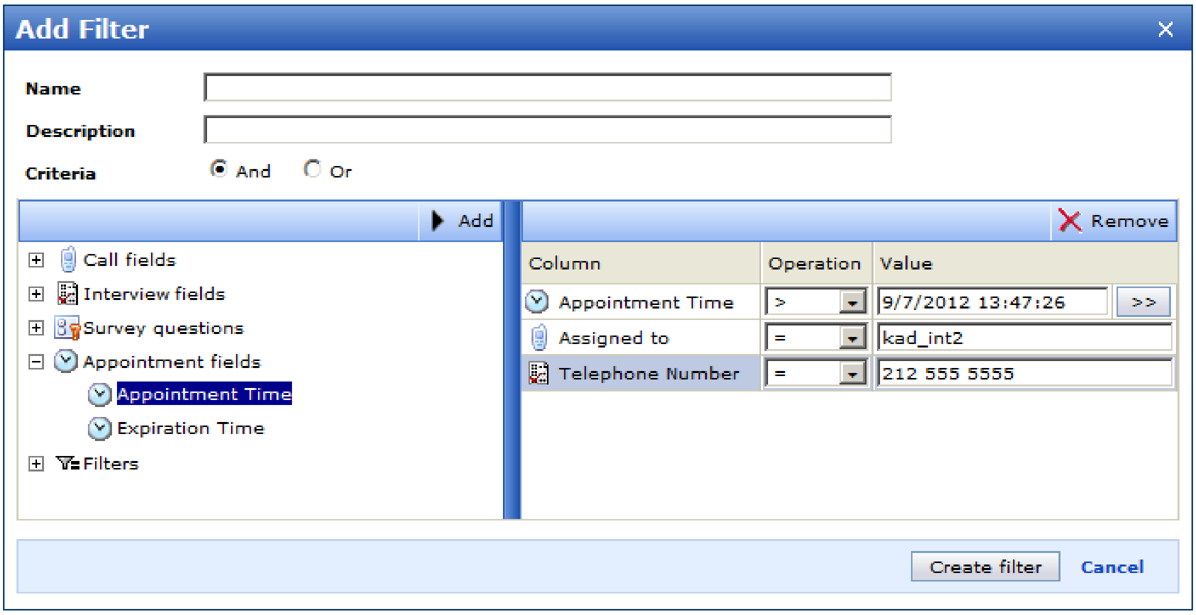


Figure 97 The Filter dialog window containing filter parameters

3. The process of filter parameters configuration is described in more detail in Creating a new filter on page 79. 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 82 for instructions).
3. Press the Copy/Move filters from survey... button . This will display the Copy/Move filters from survey dialog window.

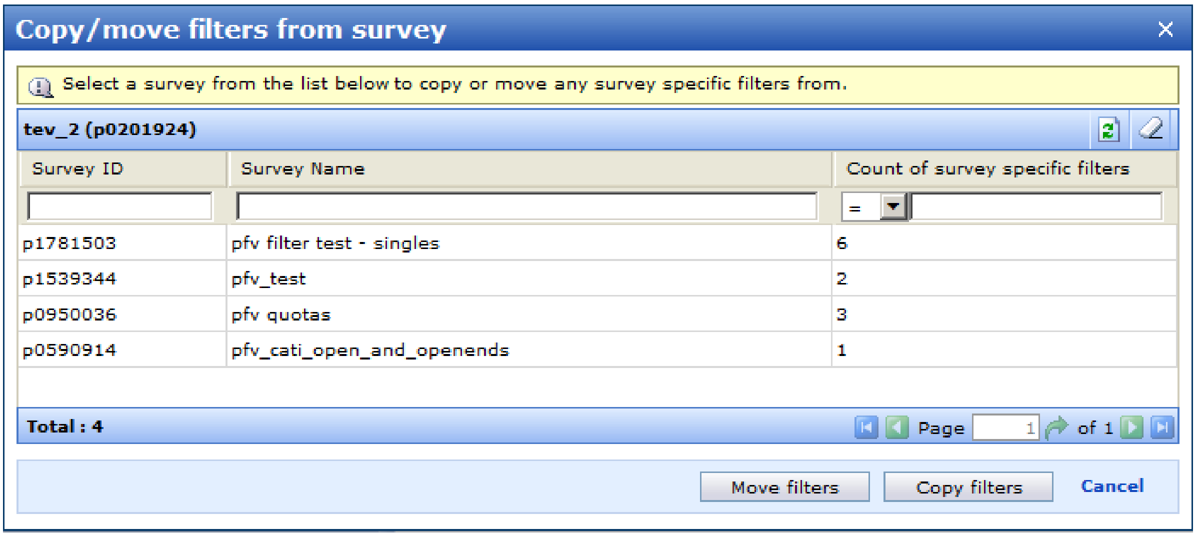


Figure 98 Copying or moving filters from the selected survey to the current survey

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.

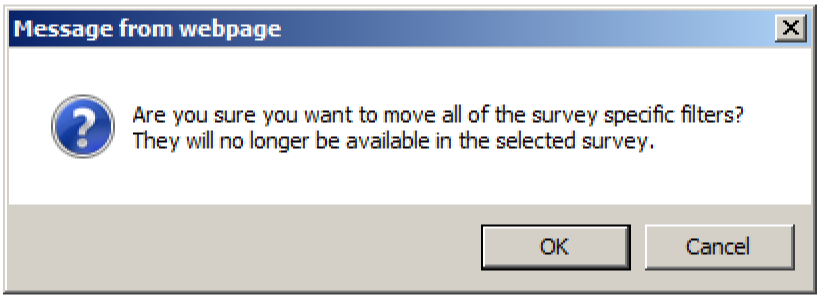


Figure 99 Confirming the Move Filters operation

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 active call distribution

The supervisor can view how many active calls existed for the selected survey during the chosen time period.

Active call distribution view is displayed in a separate window as a table. Each table row corresponds to a single interviewer and the topmost row shows combined figures. All table rows are named accordingly (see the picture below).

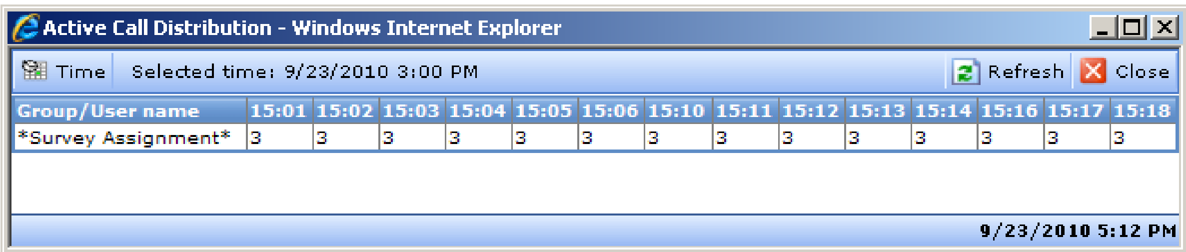


Figure 100 Viewing the active call distribution

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 the active call distribution:

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 Active Call Distribution from the shortcut menu.

   This will display the Active Call Distribution 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.

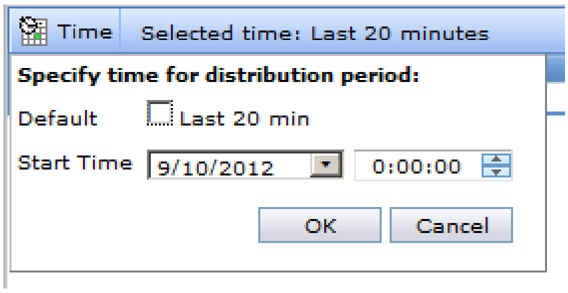


Figure 101 Specifying the start time for viewing active call distribution

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 active call distribution 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:

- View the interview/call list using a number of viewing options;
- View the interview/call history;
- View and modify the interview/call properties

Most of these management procedures are performed with the use of the dedicated dialog windows.

3.5.1 Viewing the interview/call list

You are able to 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.

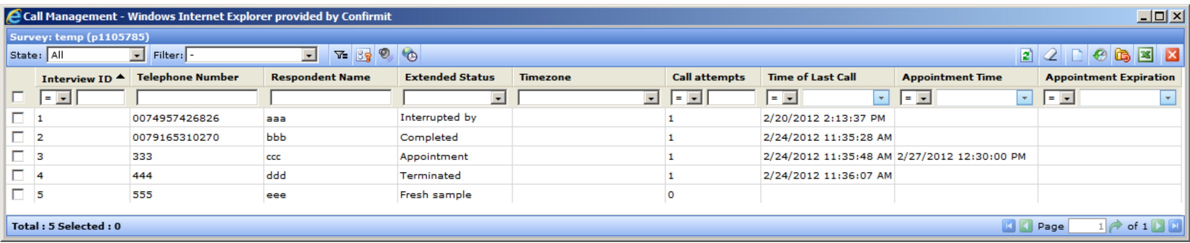


Figure 102 The Call Management dialog window

By default the list displays only calls in the “Active” 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.
	Retrieve audio	Toggle button. When enabled shows whether recorded interviews contain an audio track.
	Refresh	Updates the interview/call list.
	Clear selection	Deselects all the selected interviews/calls in the list.
	Add interview/call	Allows adding of a new interview/call and configuring its properties
	Export	Allows exporting the interview/call list.
	Close window	Closes the Call Management dialog window.

Also the total amount and the number of selected calls/interviews 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.

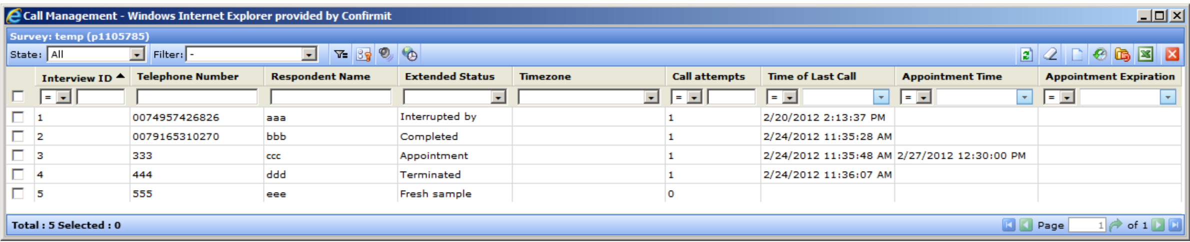


Figure 103 The Call Management dialog window

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

   There are three types of interview/call states, and an option to display all existing interviews for the current survey. You can choose to display only Active, Scheduled, Not Scheduled, 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. Therefore these are now only interviews, not calls.

   To become a call an interview object needs to be scheduled. 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). So any action that schedules an interview also turns it into a call.

Scheduled calls can be in one of the three states - they can be either "Scheduled", or "Active", or can be "In Progress". We should note that calls that are currently "In Progress" (i.e. they are being conducted at the moment by the interviewer) are not shown in the Call Management window at all - calls "In Progress" can be viewed by means of the Interviewer Activity List window (Activity Views tab - see Monitoring interviewers and their work on page 206 for instructions).

Calls in the "Scheduled" state are waiting for the appropriate interviewer to log into the CATI Interviewer Console. In other words they are waiting to become "Active", and to be put in queue for the particular interviewer.

As soon as the appropriate interviewer logs into the CATI Interviewer Console (this can be any interviewer to whom this interview is assigned) the "Scheduled" call gets into the queue for delivery to that interviewer and it changes its state to "Active". Therefore all "Active" calls are waiting in queue to be delivered to the active interviewer.

At last the "Active" call is delivered to the interviewer (when he starts the corresponding interview in the CATI Interviewer Console). At that moment the call disappears from the Call Management window, and can only be viewed with the help of the Interviewer Activity List window.

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 Active, or Not Scheduled views. Please refer to Disabling and enabling calls on page 92 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 Active and Scheduled 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 made* – this is the number of call attempts made.
   - *Time of last call* – this is the time the record was last called.

   The following properties are displayed in the Call set:

   - *Call ID* - this is the Call ID which is used system wide.
   - *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.
   - *State* – indicates whether the call is disabled or not.

4. Some operations can be performed for a number of interviews/calls selected in the Call Management window.

   You can select a number of interviews/calls by checking a box in the leftmost column in the appropriate interview/call row. 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 pressed to select a number of items.

   You can deselect all of the selected interviews/calls at once by pressing the Clear Selection button on the toolbar.

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

   The Refresh command helps keeping interview/call list in the current state – you can refresh the list periodically because some interviews/calls can be deleted and new ones may be added.

3.5.2 Viewing the interview history

Interview history is a list of calls that were ever scheduled and conducted (through the CATI Interviewer Console) for the current interview. The first record in the interview history always reflects the fact of addition of the interview to CATI (the moment when it was first assigned the Fresh Sample extended status).

NOTE Manual rescheduling, priority change and other actions that were 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.

This list cannot be modified; it can only be refreshed manually when required.

To view the interview history:

1. Display the Call Management window, and choose a required interview/call state (see Viewing the interview/call list on page 87 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.

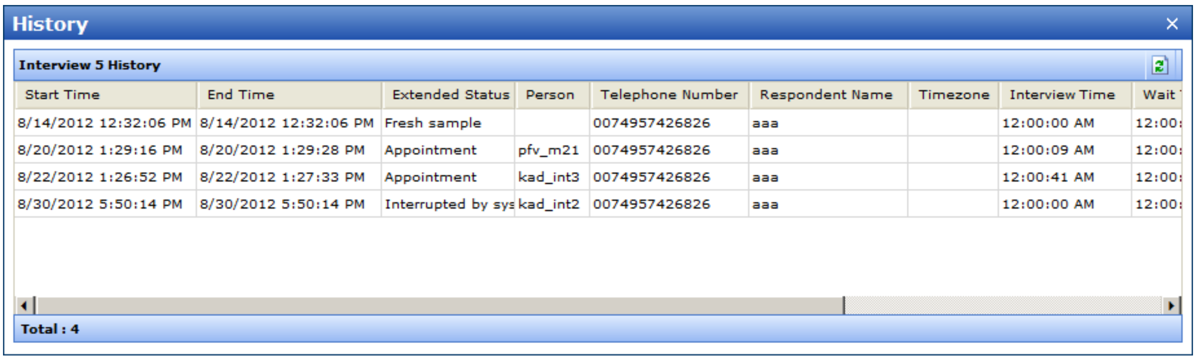


Figure 104 The Interview History dialog window

   The information regarding the interview history is organized as a table, where each row holds data regarding a single call.

3. In the table that appears the following data is displayed:

   - *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).

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

3.5.3 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 these 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 87 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 105 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.

3.5.4 Disabling and enabling calls

Whenever you need to prevent a call from being delivered to the interviewer, and still want this call to retain its properties, you may consider ***disabling*** this call.

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

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 grayed out 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.

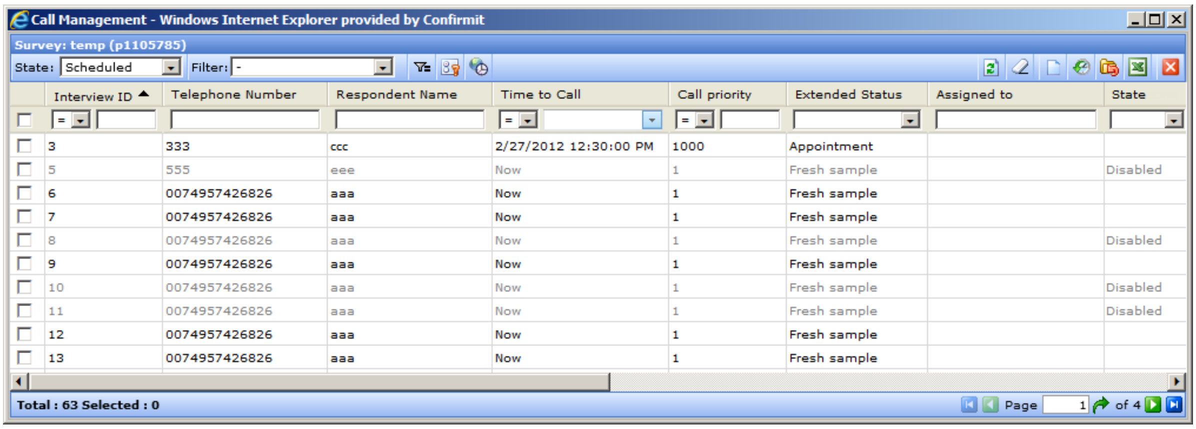


Figure 106 The Call Management window showing the disabled calls

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 138);
- 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 93 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 64 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 138);
- 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 94 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 64 for instructions);
- from the Activate Call dialog window (as part of the Activate Call operation - see Activating an interview on page 106 for details);
- from the Edit Call dialog window (as part of the Edit Call operation - see Editing a call on page 99 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 87).
2. Choose the Scheduled view to display calls (see Viewing the interview/call list on page 87).
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).

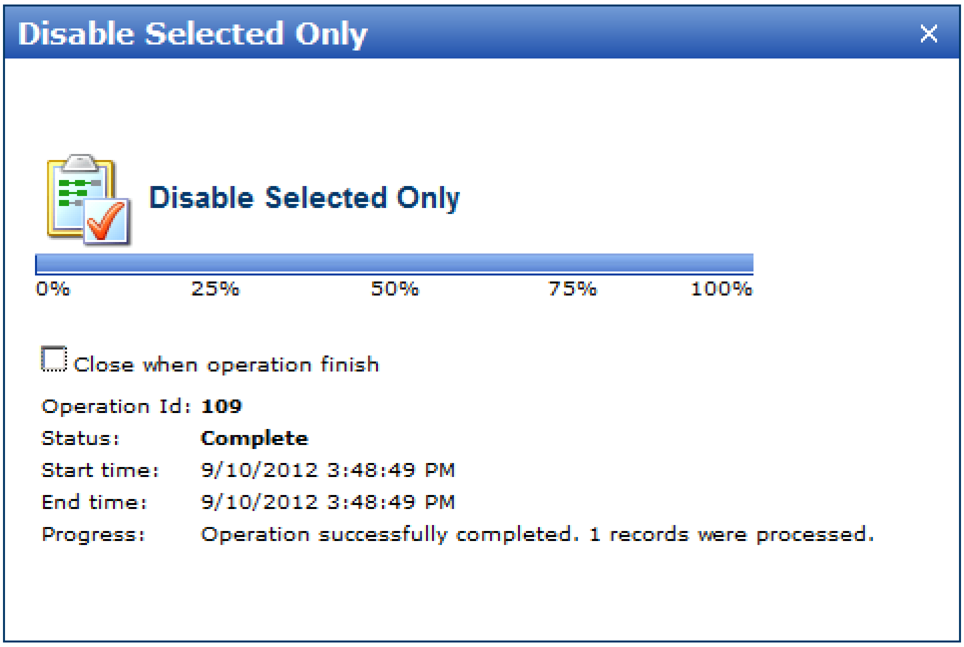


Figure 107 Disabling selected calls progress dialog

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 on page 106 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 on page 106.

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 87).
2. Choose the Scheduled view to display calls (see Viewing the interview/call list on page 87).
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).

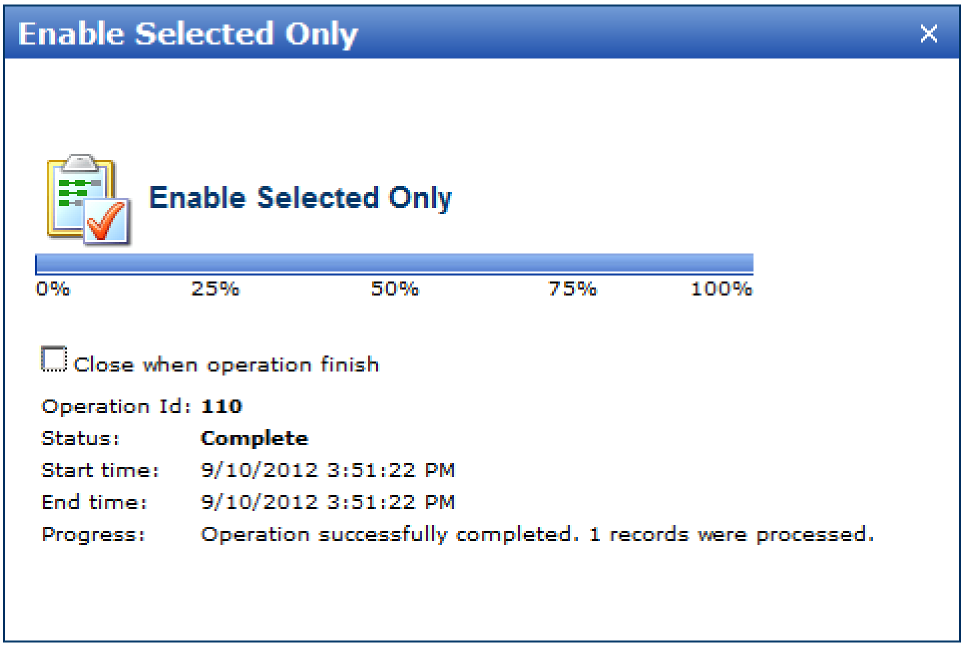


Figure 108 Enabling selected calls progress dialog

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 on page 106 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 on page 106.

3.5.5 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 77 for instructions on how to perform these operations.

3.5.5.1 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).

3.5.5.2 *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.

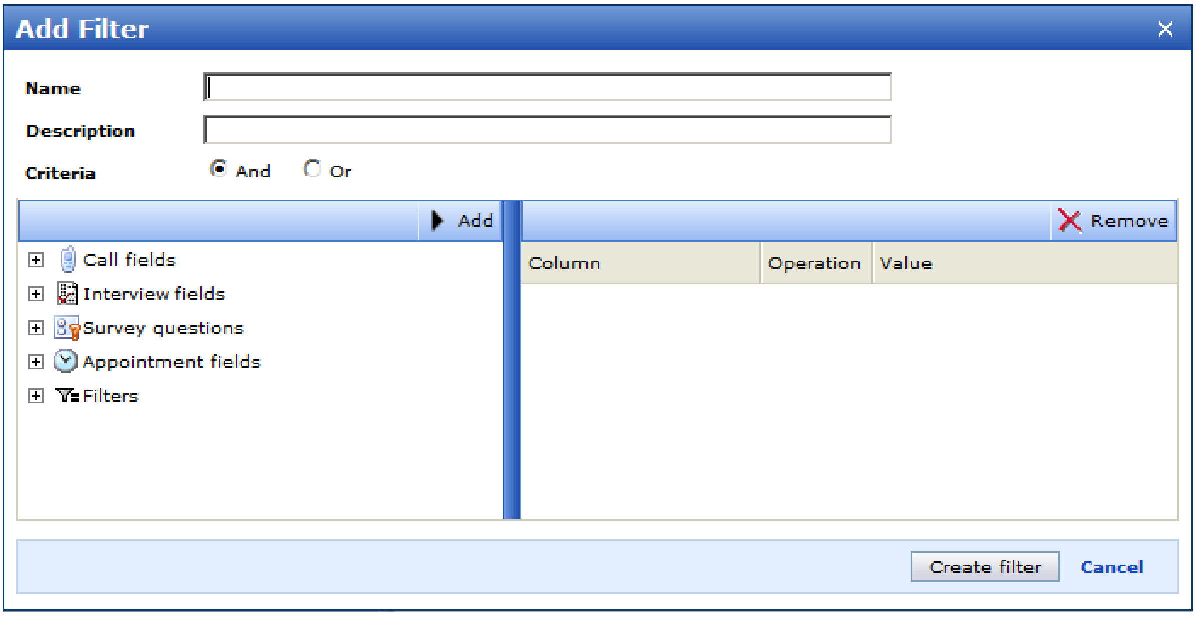


Figure 109 The Filter dialog window (empty)

2. Please refer to Creating a new filter on page 79 for detailed instructions on creating a new filter.

3.5.6 Displaying survey 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.

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.

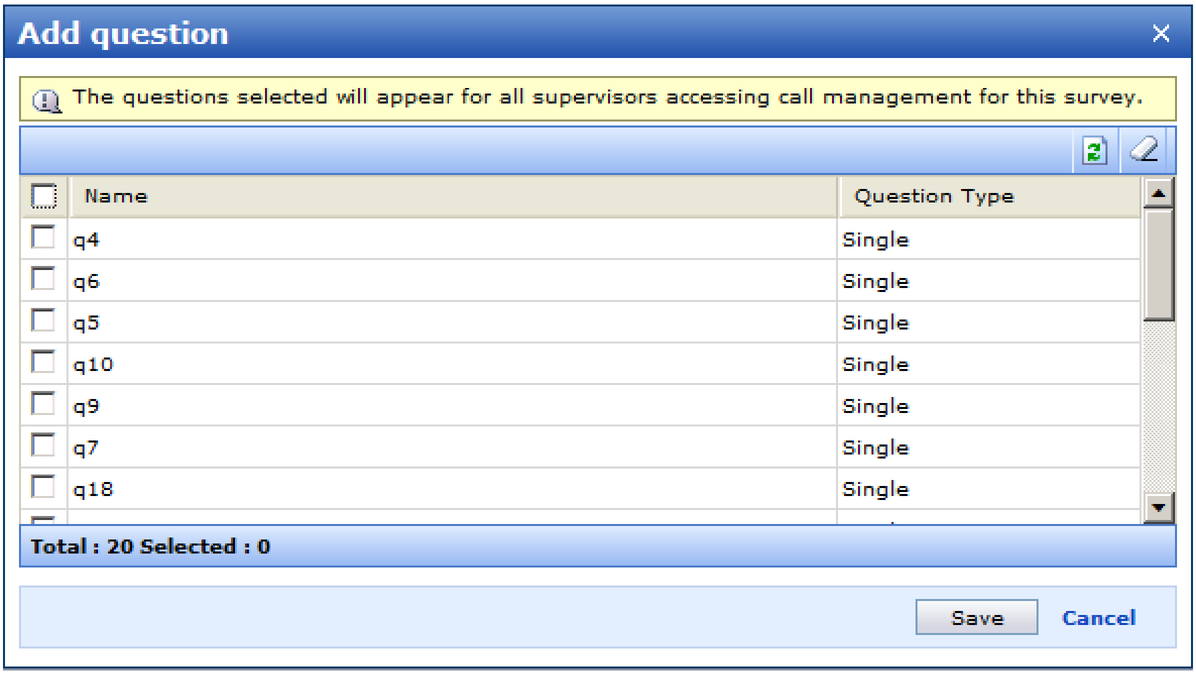


Figure 110 Adding a variable column with the help of the Select Variables dialog window

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.

3.5.7 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.

3.5.7.1 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.

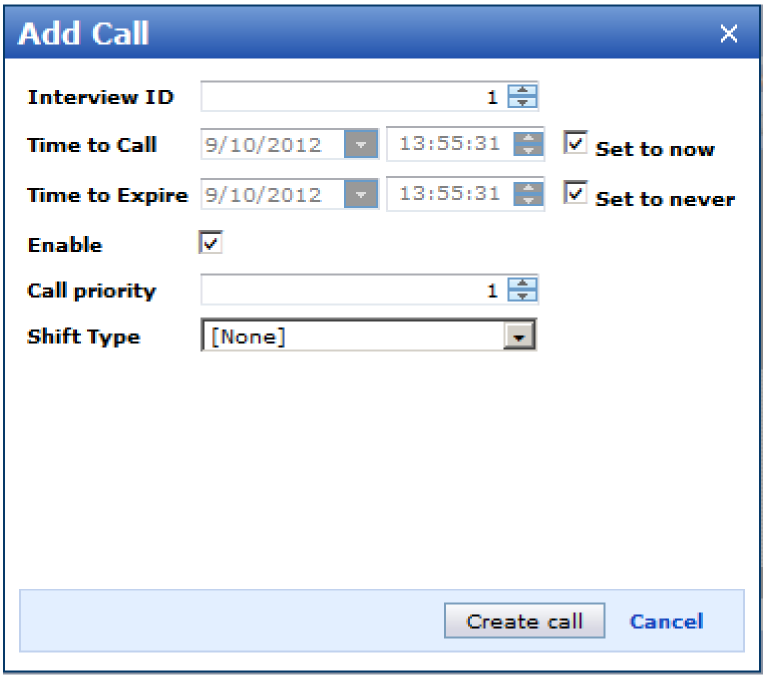


Figure 111 Adding/modifying the call properties

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 92 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 99.

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.

3.5.7.2 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 111, Changing the shift type for a call on page 111, Assigning a person/group to a call on page 112, Moving an interview/call on page 102, Disabling and enabling calls on page 92.

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 87 for instructions).

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

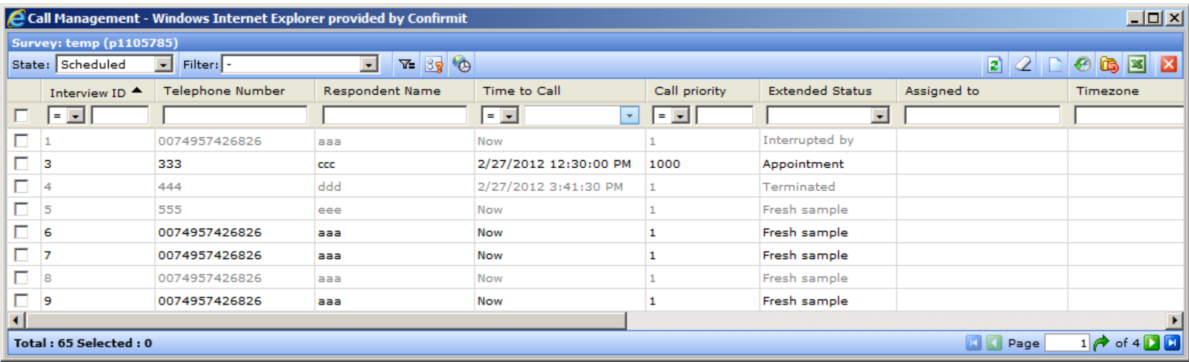


Figure 112 Call Management dialog window displaying scheduled calls only

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.

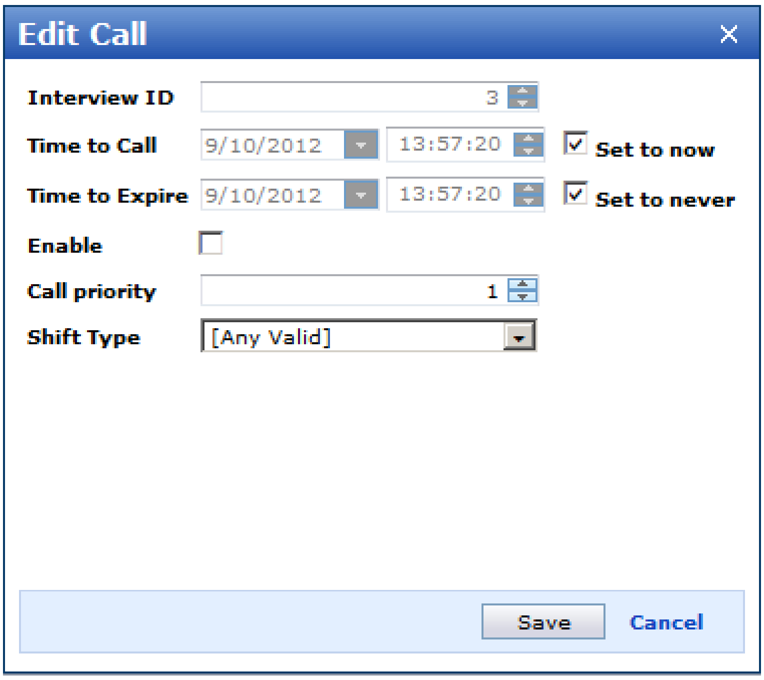


Figure 113 Editing call properties using the Edit dialog window

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 92 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.

3.5.7.3 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 87 for instructions).

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

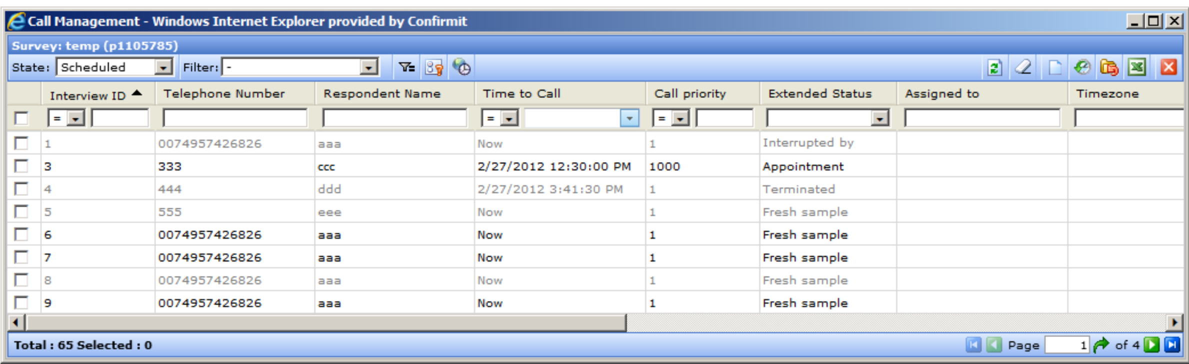


Figure 114 Call Management dialog window displaying scheduled calls only

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.

3.5.7.4 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.

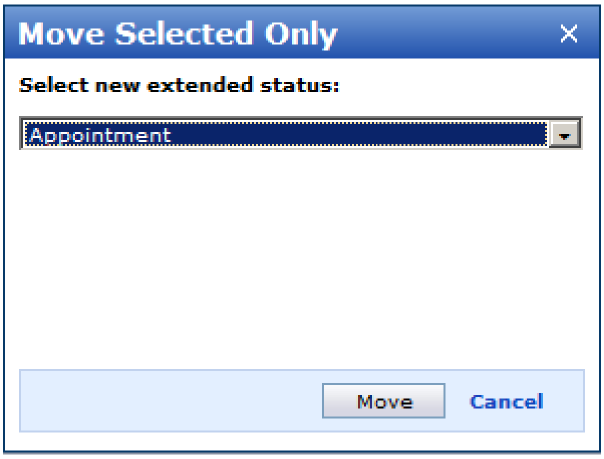


Figure 115 Move Selected Interviews Only dialog window

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 302 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.

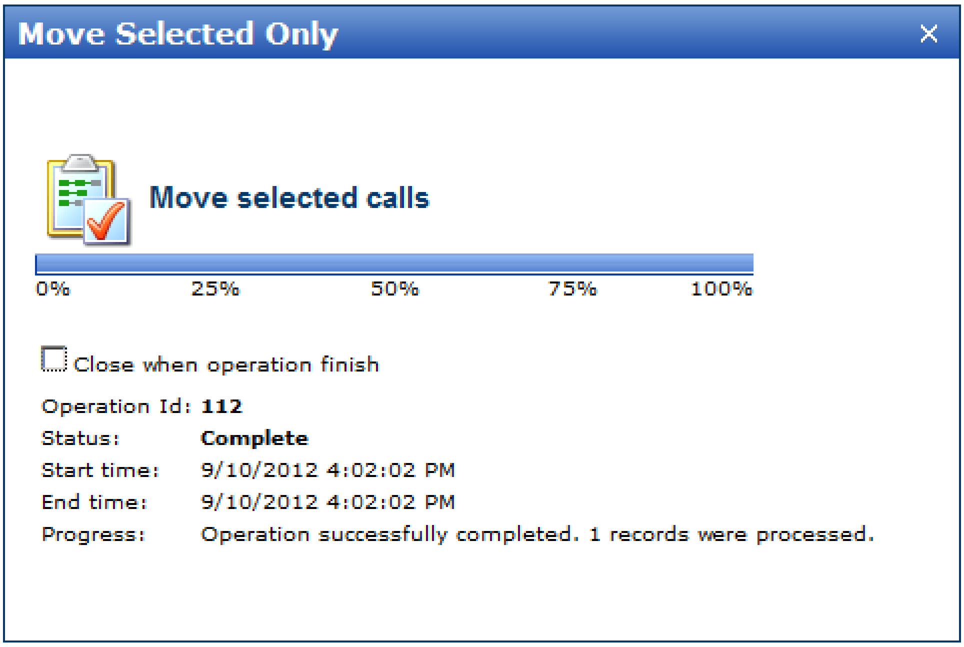


Figure 116 Move operation monitor window - operation completed successfully

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.

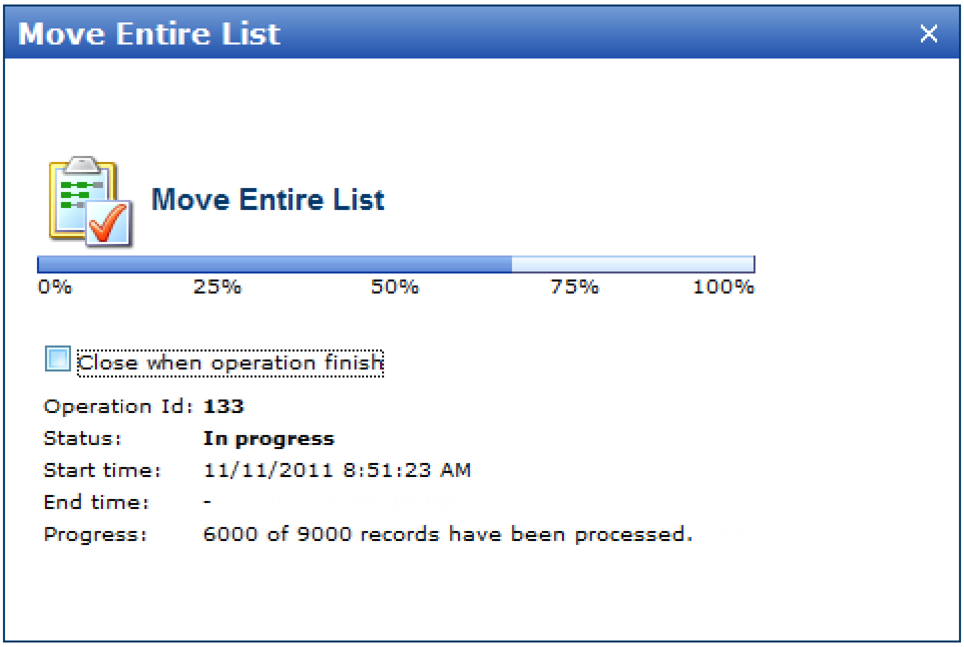


Figure 117 Move operation monitor window - operation in progress

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

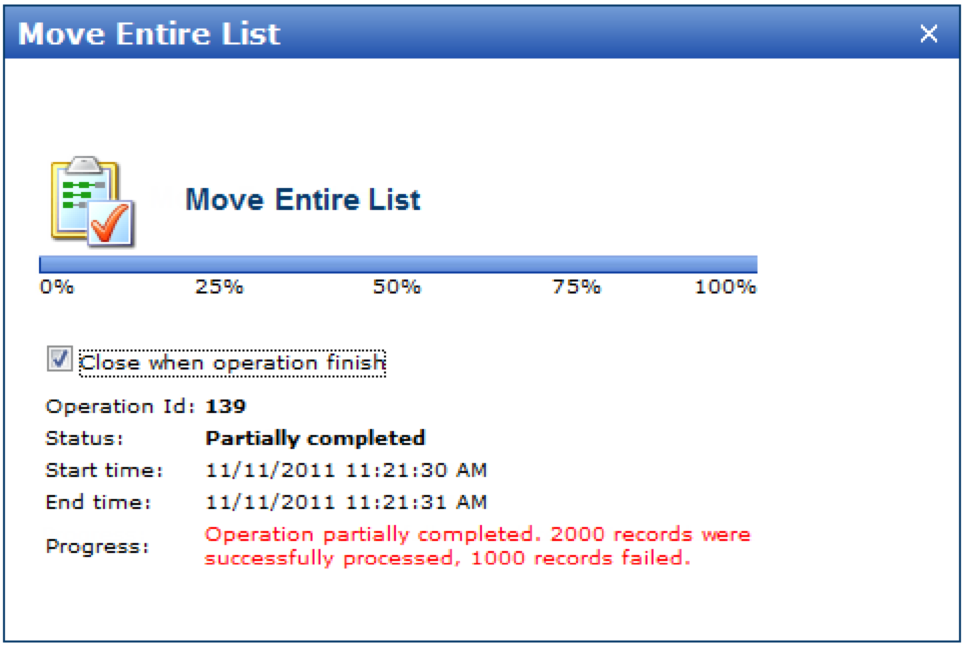


Figure 118 Move operation monitor window - operation partially completed

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

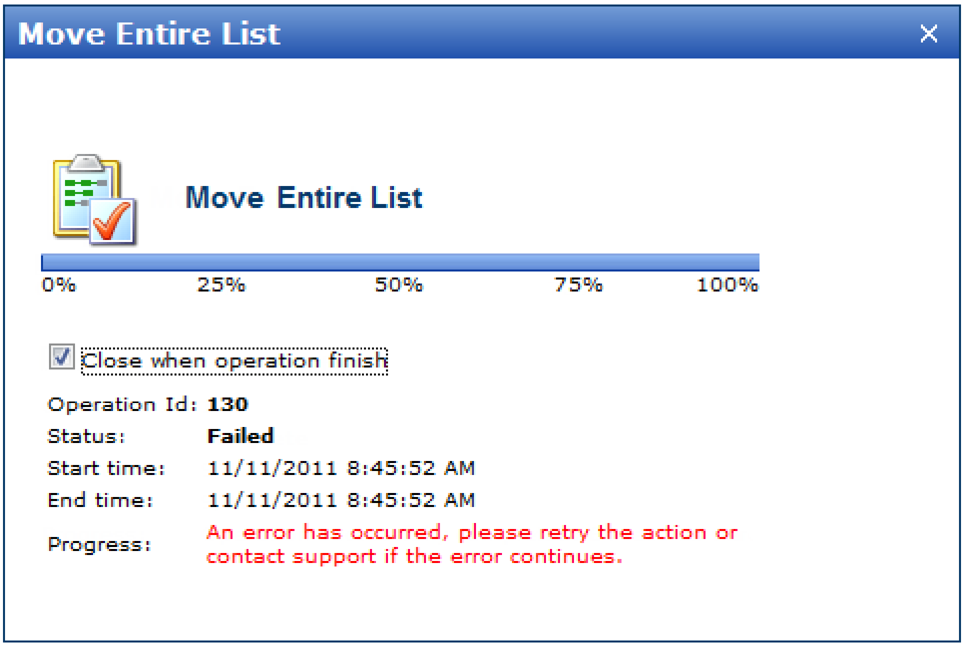


Figure 119 Move operation monitor window - operation failed

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.

3.5.7.5 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.

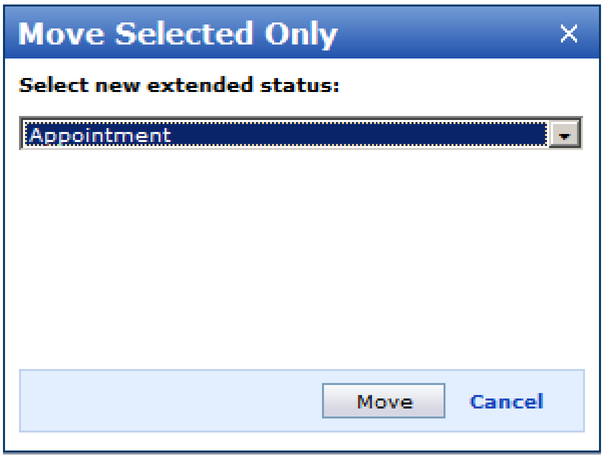


Figure 120 The Move and Reschedule Interviews dialog window

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 302 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.

3.5.7.6 Activating an interview

You have an option of instantly modifying scheduling parameters of an interview and, therefore, turning it into a call. To do this you have to “activate” the interview.

By executing the Activate command you can instantly schedule the call and assign a person/group to this call in one step.

To activate an interview:

1. Select the required interview (or a group of interviews) 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).
2. Right-click the selected interview/call (or any interview/call in the selected group), 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 the whole interview 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 (either for the selected only, or for the entire list).

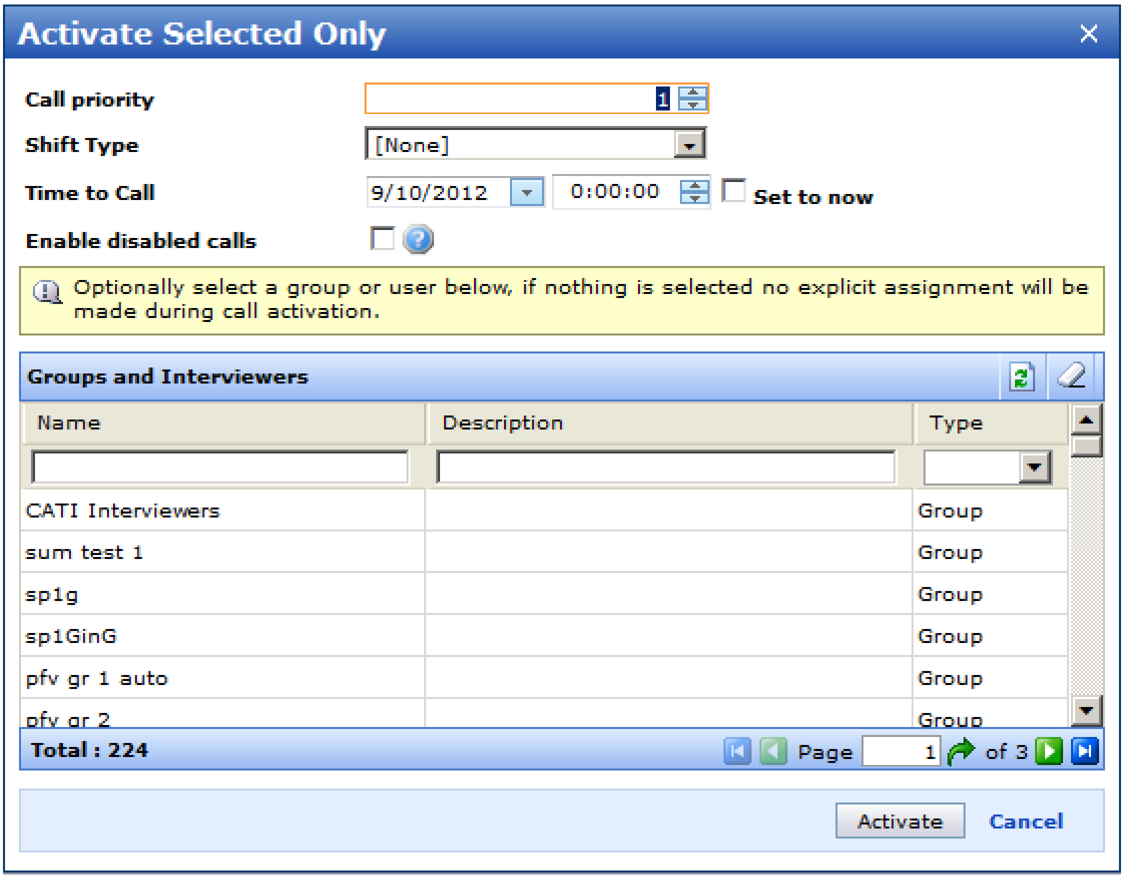


Figure 121 Activate Interview dialog window

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 into 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.
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 progress dialog (see the picture below) allows you to monitor the operation progress and outcome.

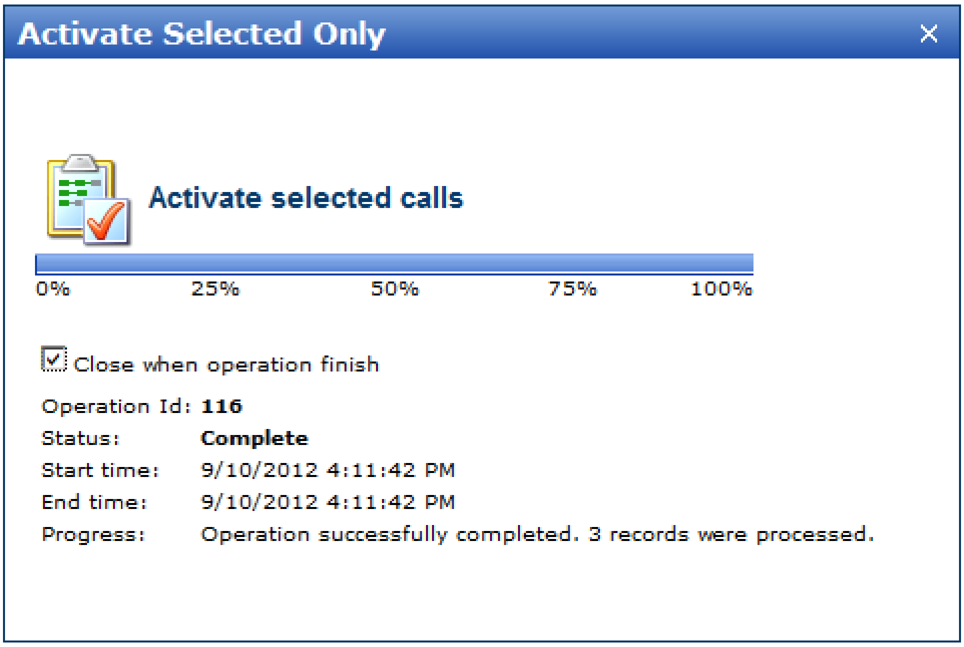


Figure 122 Activate operation monitor window - operation completed successfully

The following information is displayed in the progress monitor dialog window.

- Progress bar - displays the percent 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.

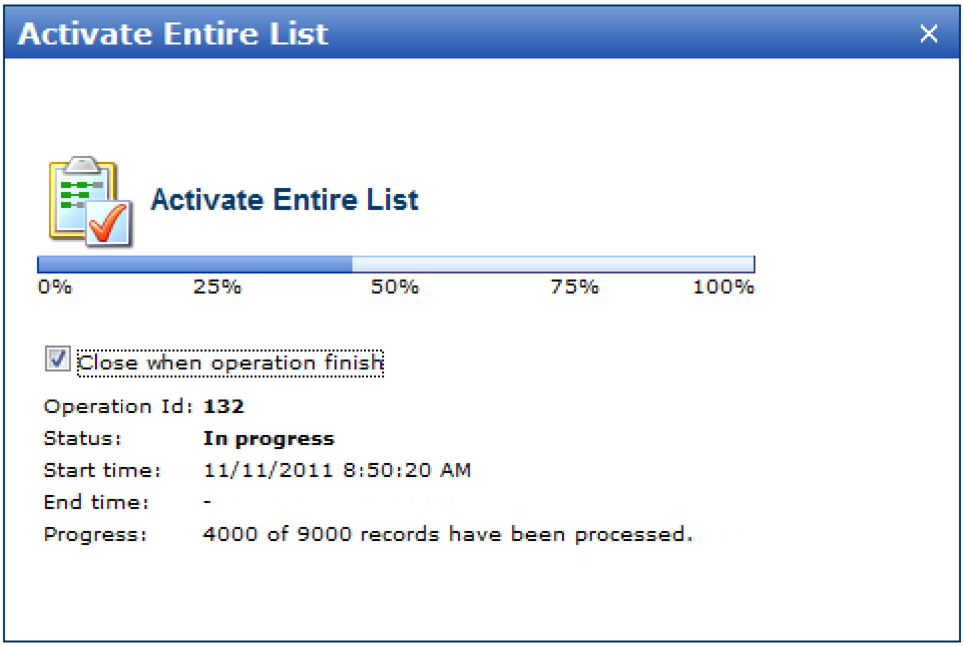


Figure 123 Activate operation monitor window - operation in progress

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

Figure 124 Activate operation monitor window - operation partially completed

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

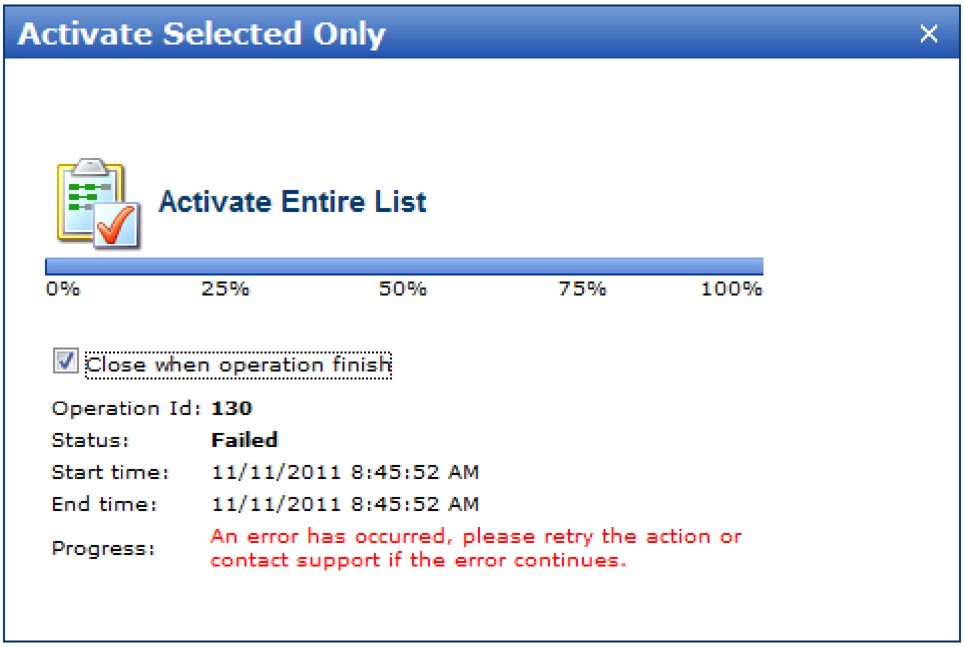


Figure 125 Activate operation monitor window - operation failed

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. When the Activate operation finishes, the interview list in the Call Management dialog window is refreshed, and selected interviews/calls are activated.

3.5.7.7 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.

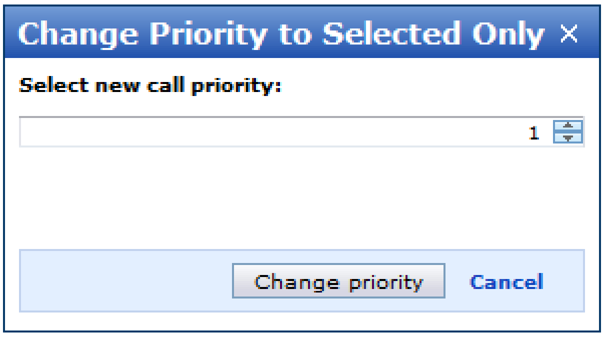


Figure 126 Change Priority of the Interview dialog window

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.

3.5.7.8 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.

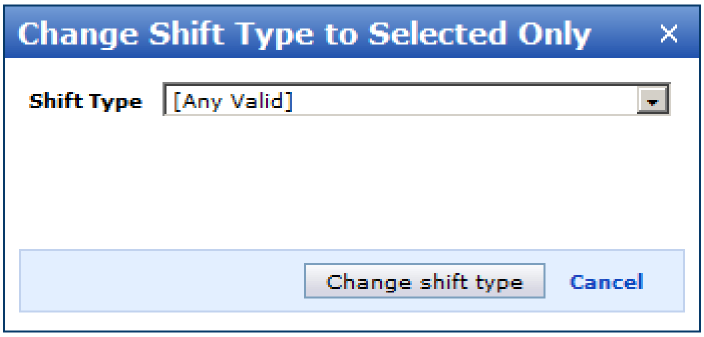


Figure 127 Change Shift Type dialog window

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.

3.5.7.9 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 active or scheduled calls.

To assign a person/group to a call:

1. In the Call Management list Choose Scheduled or Active in the State drop-down list to display only scheduled or active calls .
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.

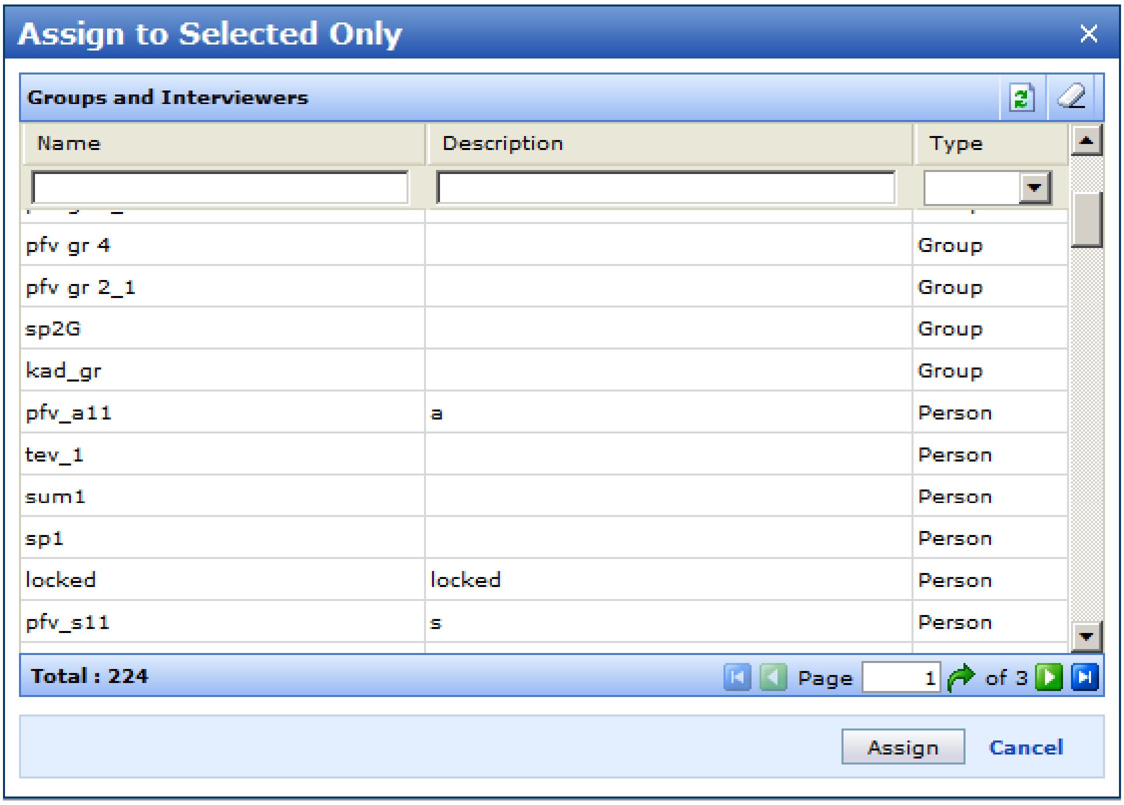


Figure 128 Assign to a Call dialog window

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.
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.

3.5.8 Setting up dialing mode for an interview

When the dialer is enabled, and the survey you are working with is in the Predictive dialing mode (see The Dialer on page 241 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 The Dialer on page 241 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).

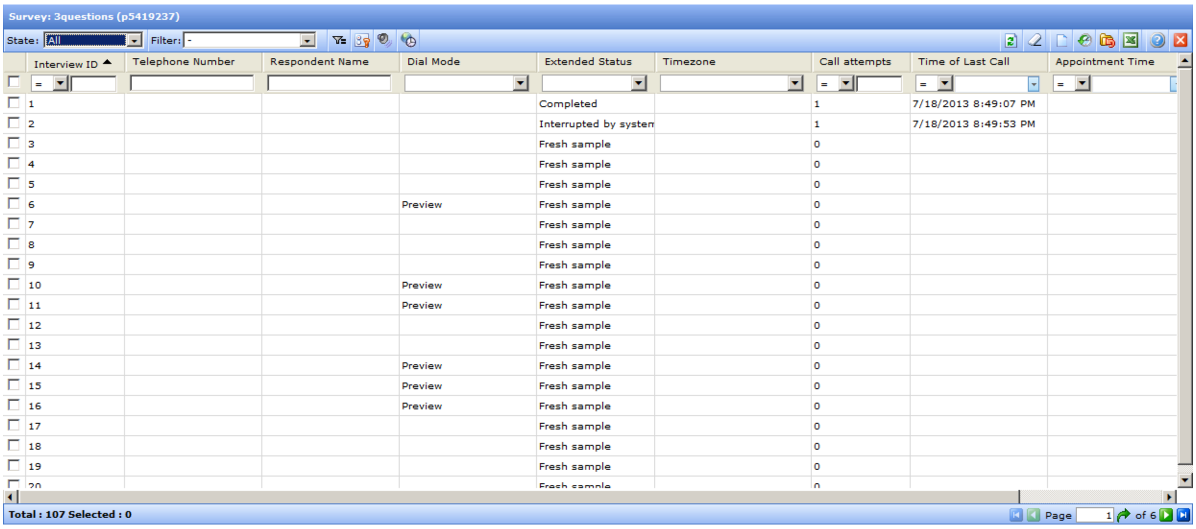


Figure 129 Choosing the dial mode in the Call Management window

3.5.9 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 222 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 marked appropriately 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.

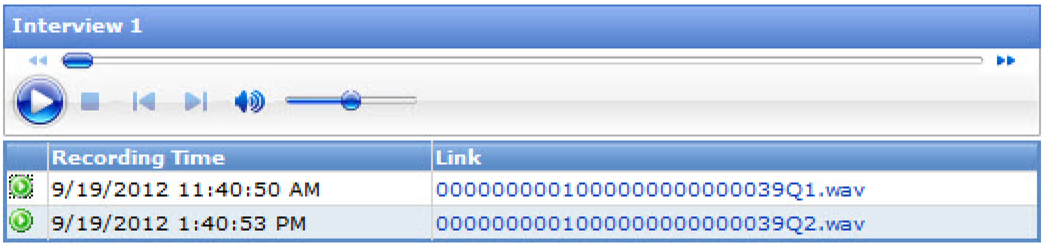


Figure 130 Playing back the audio track from the recorded interview

   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.

3.5.10 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.

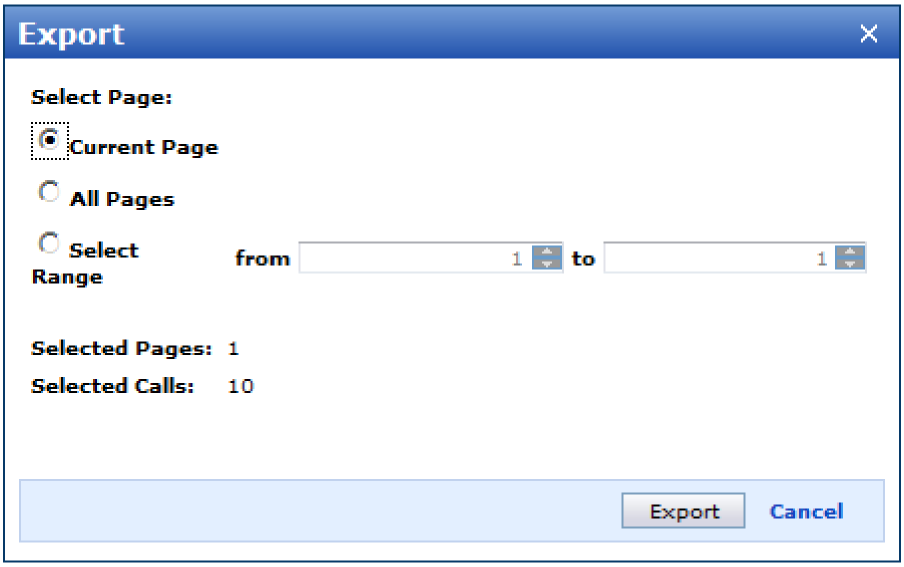


Figure 131 Exporting interview/call list

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 *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 117 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 55 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 Making assignments for a selected survey on page 120 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 121 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 18, Viewing and modifying the interviewer properties on page 30, Adding and replacing survey assignments directly from the interviewer group list on page 22, and Adding and replacing survey assignments directly from the interviewer list on page 39 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 122 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 121 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.

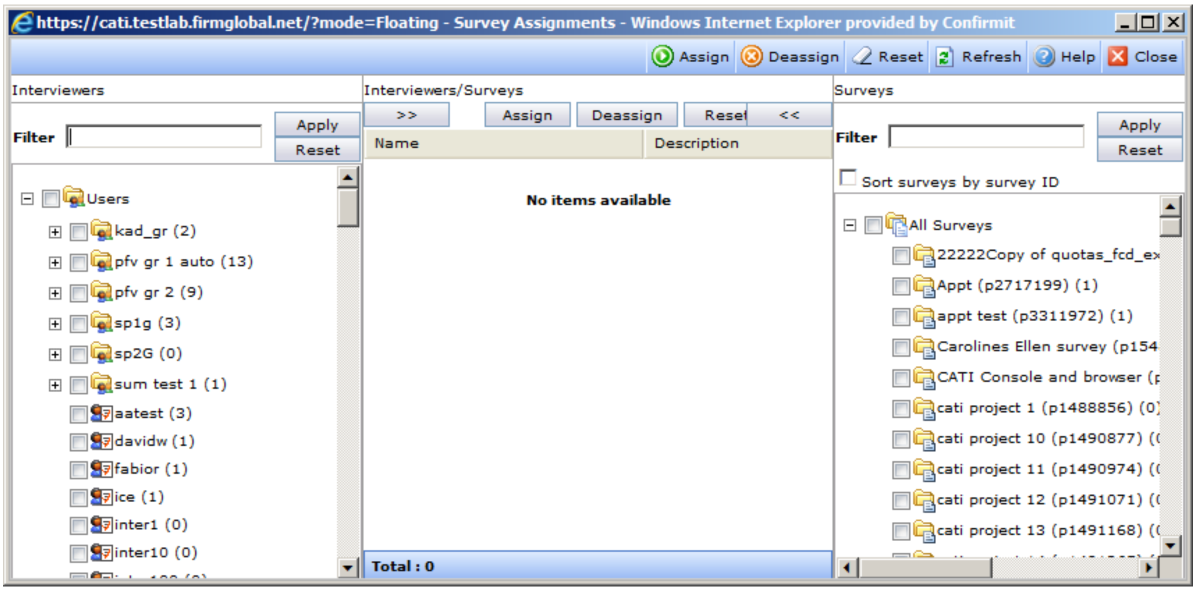


Figure 132 The Survey Assignments dialog window

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  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  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 55 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 122 for this procedure description.).

3.6.2 Making 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 55 for details).

The command that allows adding interviewer assignments to a survey is available from the context menu for any survey displayed in the survey list.

This procedure can be used to add assignments only to a single selected survey.

The dialog window that is described below can only be used for adding new assignments, not for removing the existing ones.

To assign interviewers to the selected survey:

1. Open the list of surveys in the top right frame (see Viewing the survey list on page 49 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 a single survey - to the one you have right-clicked upon. It cannot be executed for a number of selected surveys at a time.

   This will display the Select users and groups dialog window.

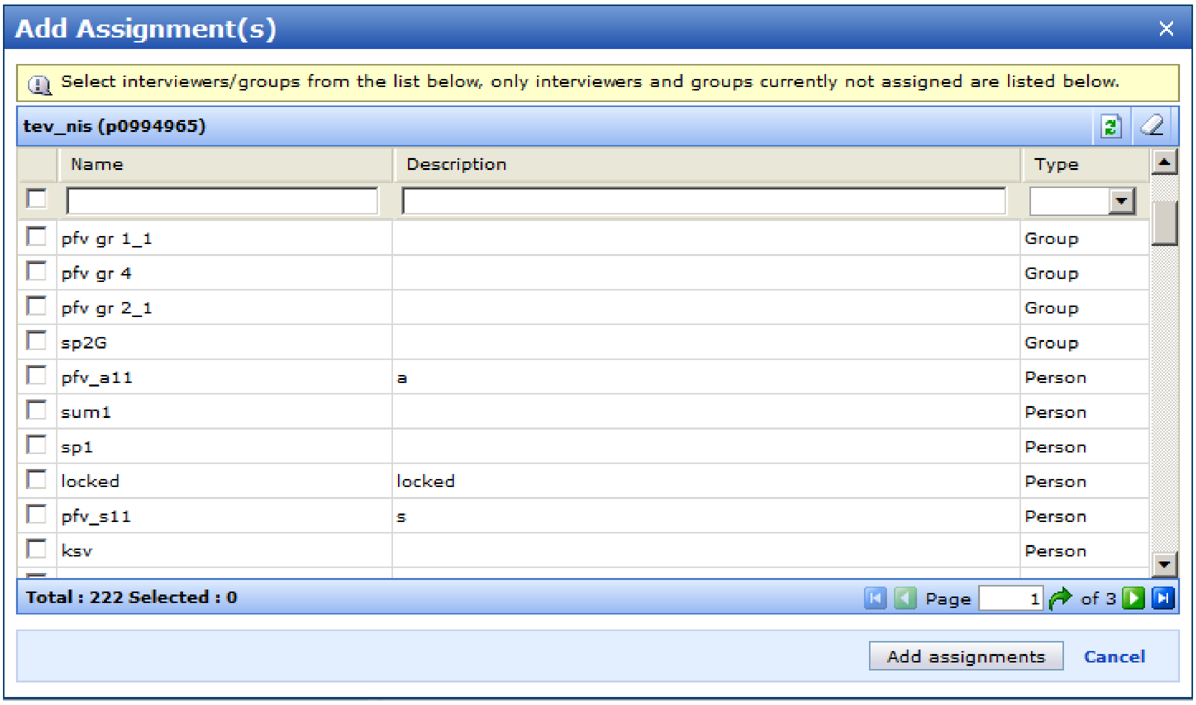


Figure 133 Selecting users and groups to assign to the survey

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 117 or in Viewing and modifying the survey assignments on page 55.

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.

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 55 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.

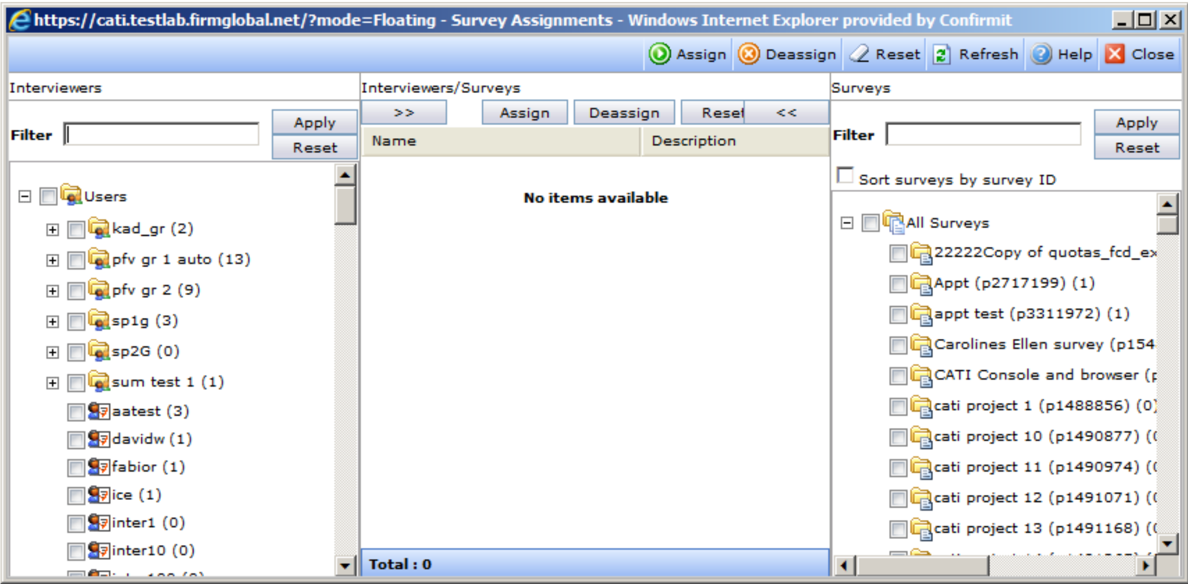


Figure 134 The Survey Assignments dialog window

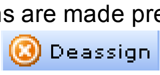
2. De-assign operation is performed in a similar way to the Assign operation.

   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 117 section.

3. Please follow the procedure described in Making assignments in the Survey Assignments dialog window on page 117 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 55 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 30 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 87 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 49 for details), press the Survey Assignments button in the top right frame toolbar.

   This will display the Survey Assignments dialog window.

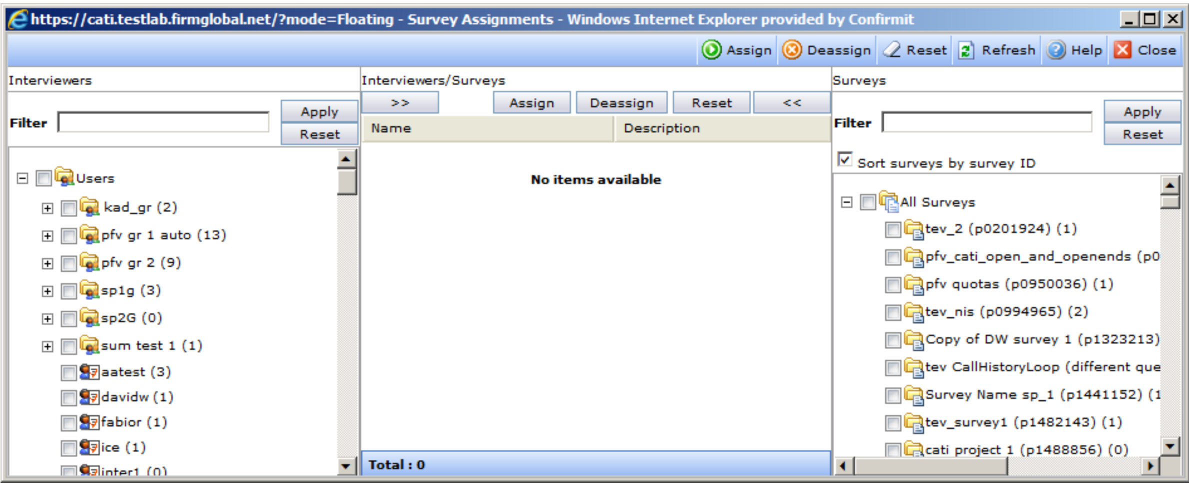


Figure 135 Survey Assignments dialog window

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;

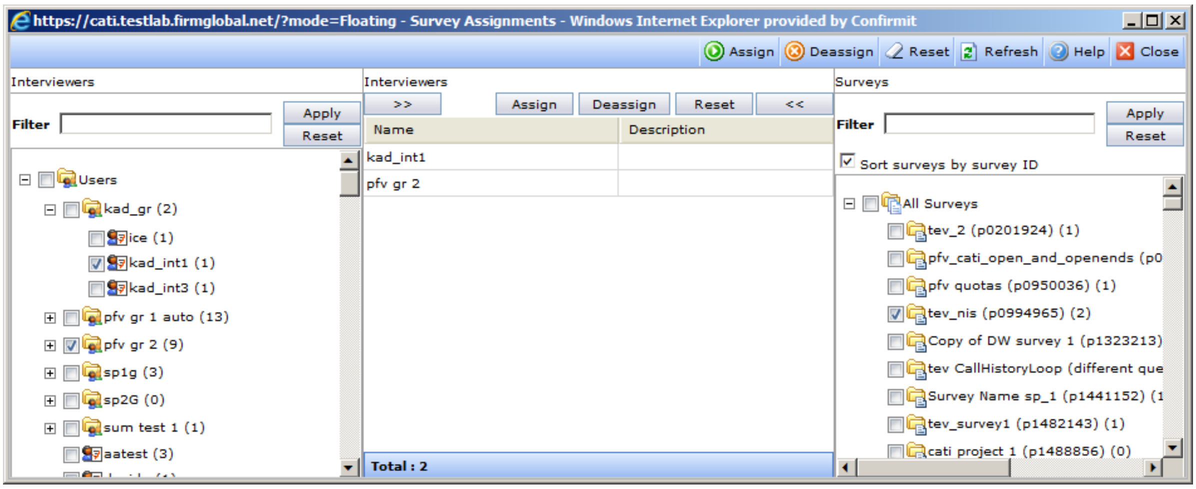


Figure 136 Survey Assignments dialog window showing assignments made for a survey

- 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.

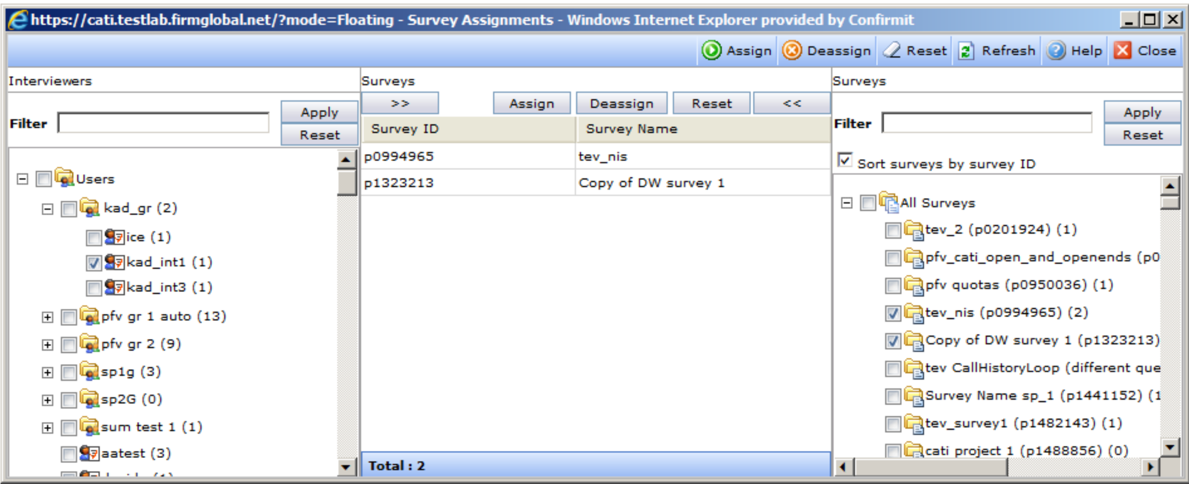


Figure 137 Survey Assignments dialog window showing assignments made for an interviewer/interviewer group

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

CATI Supervisor allows exporting the call history data. These data include a number of call properties (see the complete list below). These data can include calls made in the course of a single, or a number of surveys.

Call history data are 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.

Project ID – The Project ID (Pxxxxx) for the survey, or "BREAK" for interviewer breaks.

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).

Telephone Number – The telephone number of the respondent (blank for interviewer breaks).

Extended Status – The numeric value of the extended status for the call outcome.

Duration – The duration of the call made in seconds (blank for interviewer breaks).

Waiting time - The time spent (in seconds) waiting for the call to be delivered (blank for interviewer breaks).

Data in the file are sorted by ProjectID and then by date/time timestamp. Row headers are not included.

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. Call History data pertaining to the selected surveys will be exported then.
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.

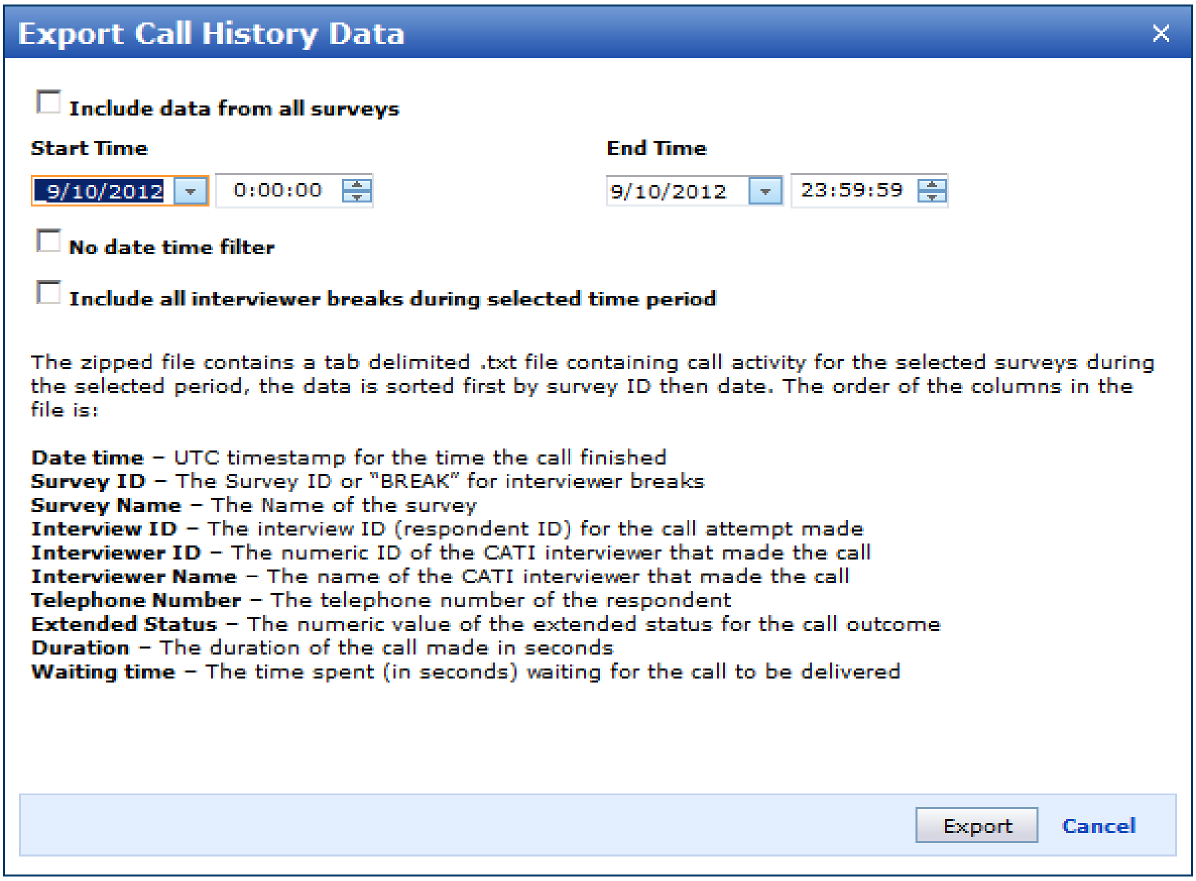


Figure 138 Selecting options for the call history data export

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, 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.
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 125 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 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 52). 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.

4.1 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.

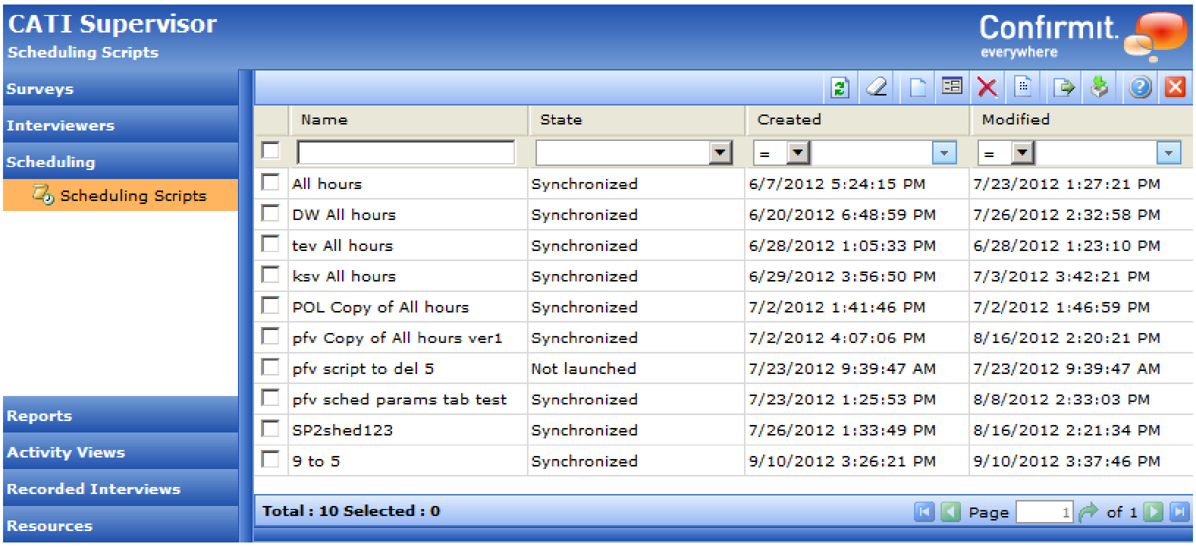


Figure 139 The Scheduling Script list

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

4.2 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.

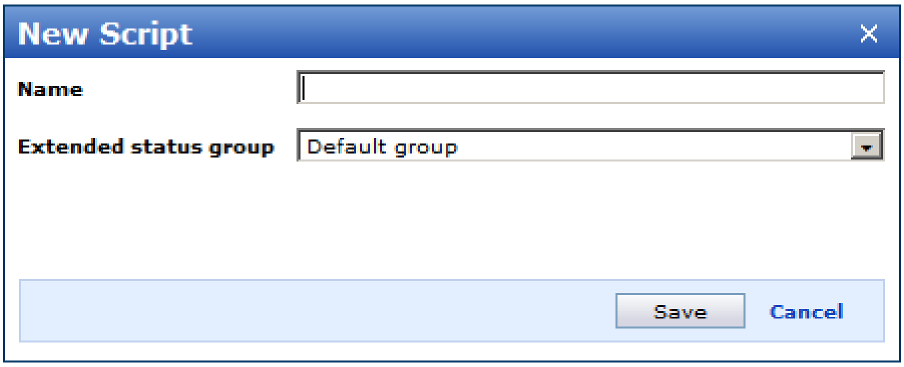


Figure 140 The New Script dialog window

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 230 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 132 for instructions on configuring the scheduling script.

4.3 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.

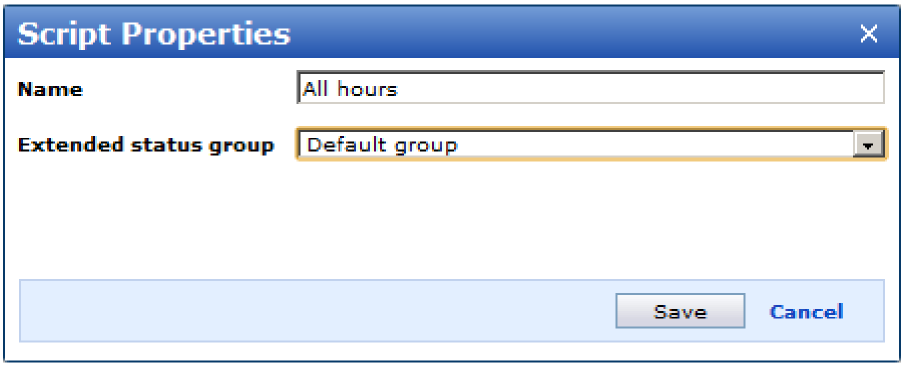


Figure 141 Renaming the scheduling script

   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.

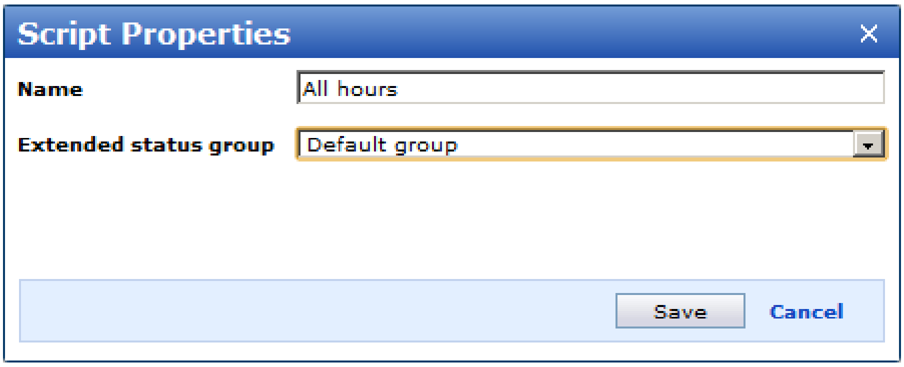


Figure 142 Changing the extended statuses group currently used with the script

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 230 for information on what are these groups 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 138).

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

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

4.4 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 138.

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.

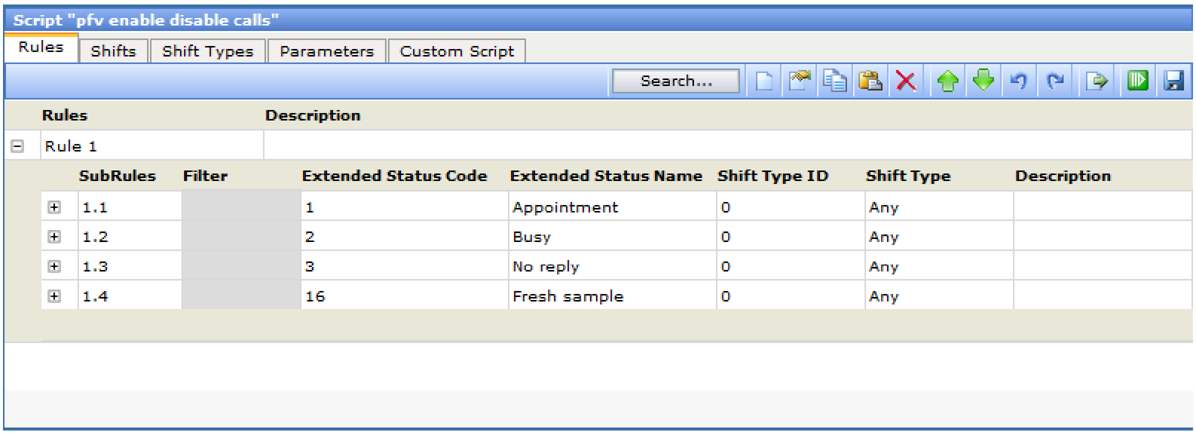


Figure 143 Viewing the script settings in the bottom right frame

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 138 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 135 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 133 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 142 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 146 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.

4.5 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 251 and Configuring the Active Timezone list on page 252 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 135.

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.

4.5.1 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 131 for details), choose the Shift Types tab in the bottom right frame. This will display the list of existing shift and exclusion types.

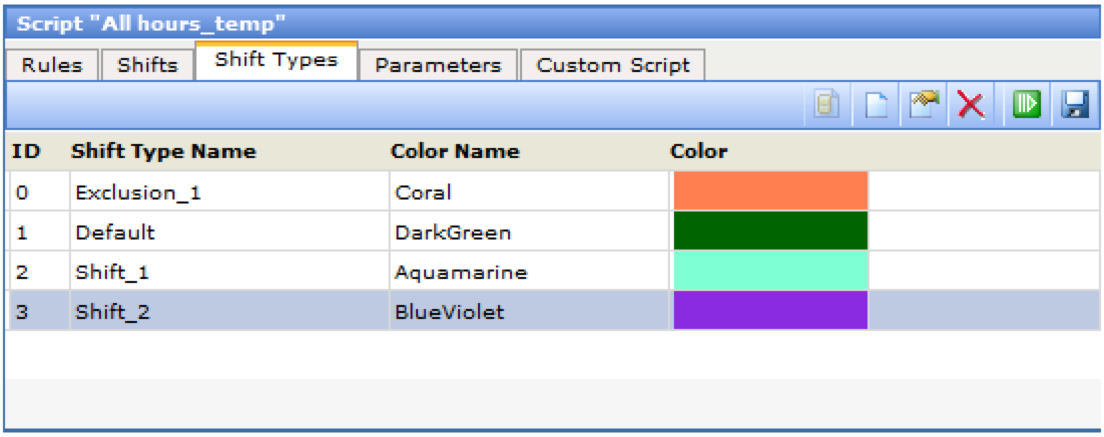


Figure 144 Creating shift and exclusion types using the Shift Types tab

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.

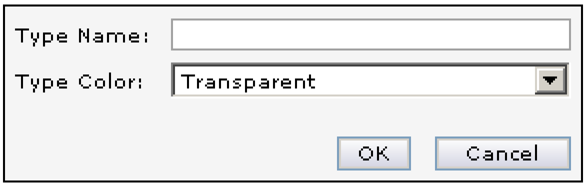


Figure 145 Adding a new shift (exclusion) type

   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 135 for instructions).

4.5.2 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 133.

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 131 for details), choose the Shifts tab in the bottom right frame. This will display the list of existing shifts.

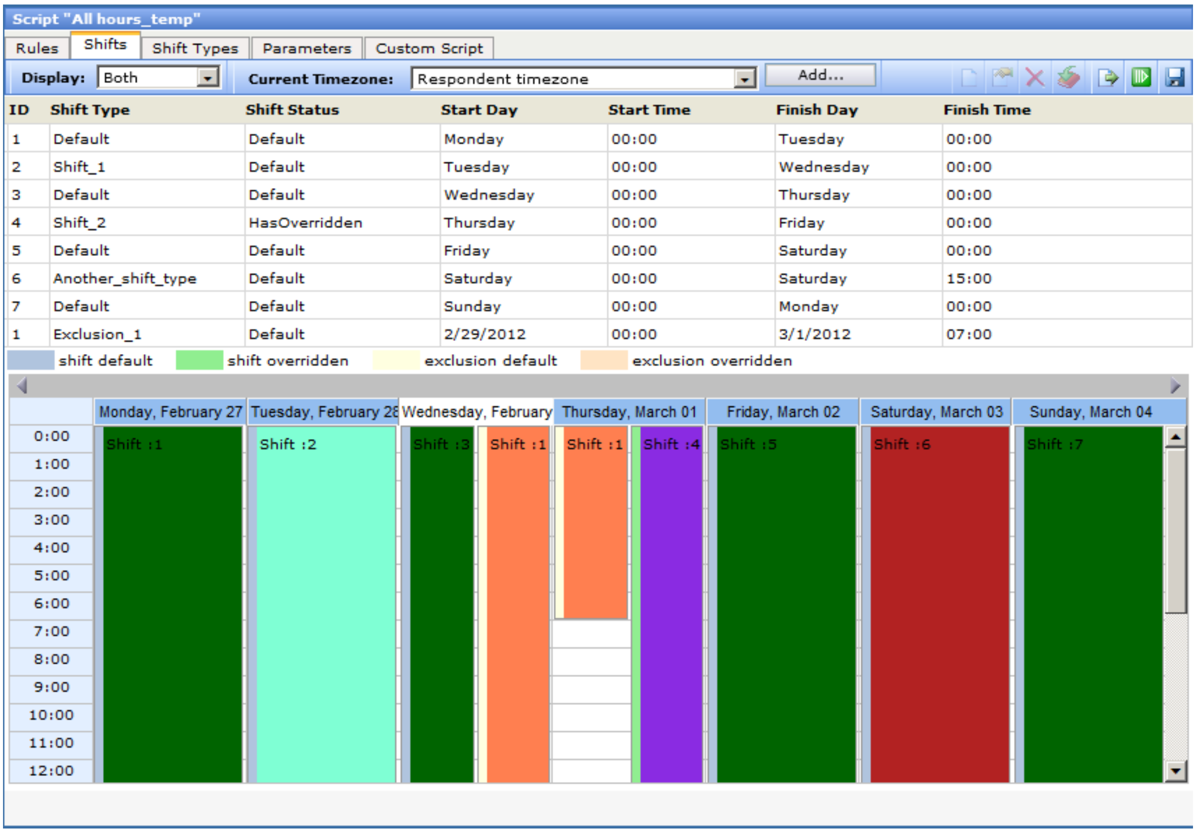


Figure 146 Specifying shifts and exclusions using the Shifts tab

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.

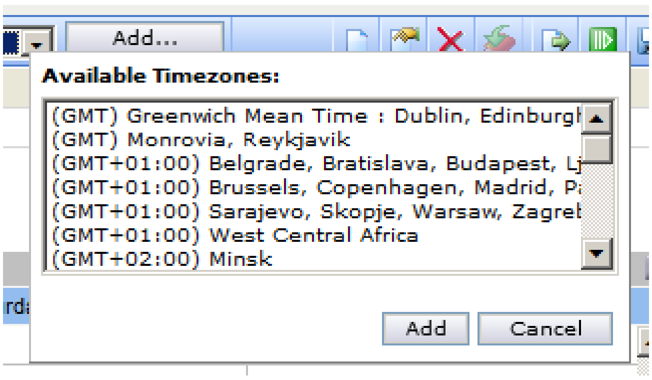


Figure 147 Adding a time zone

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 252.

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.

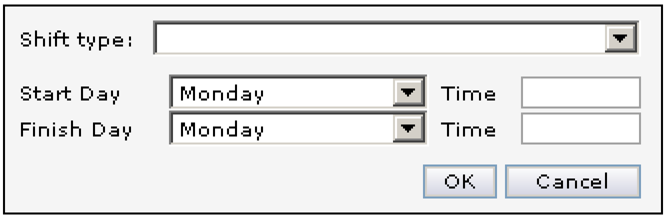


Figure 148 Adding a new shift

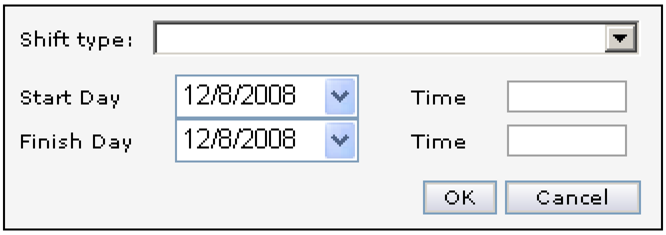


Figure 149 Adding a new exclusion

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.

4.5.3 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 142 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 131 for details), choose the Rules tab in the bottom right frame. This will display the list of existing scheduling rules.

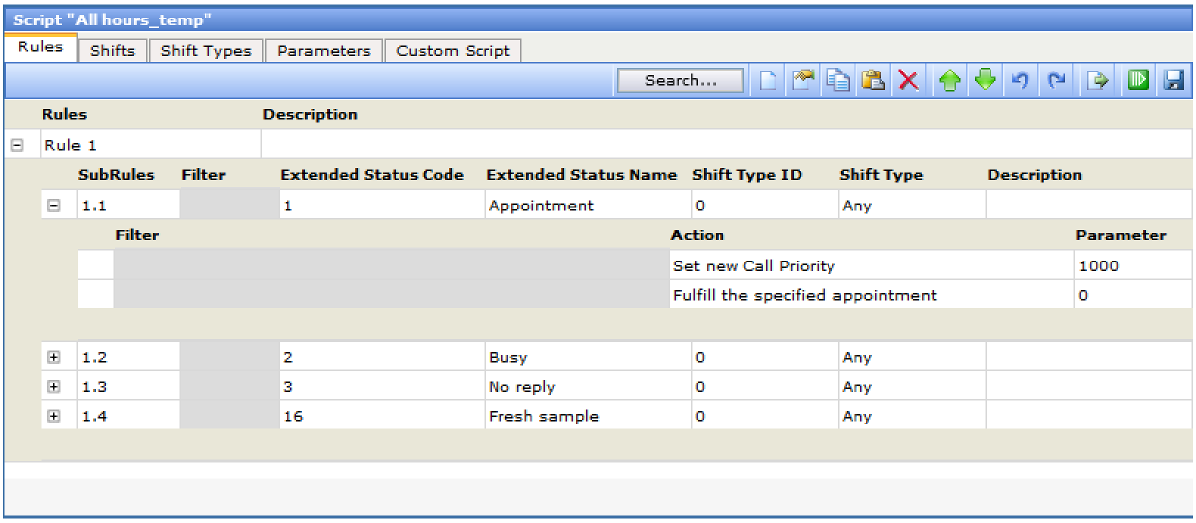


Figure 150 Viewing the scheduling rule list for the selected scheduling script

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.

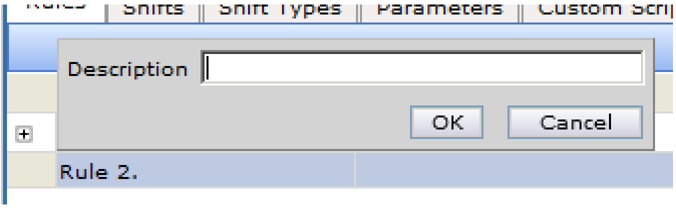


Figure 151 Adding a new scheduling rule

Enter the rule description in the Description field.

Press OK 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.

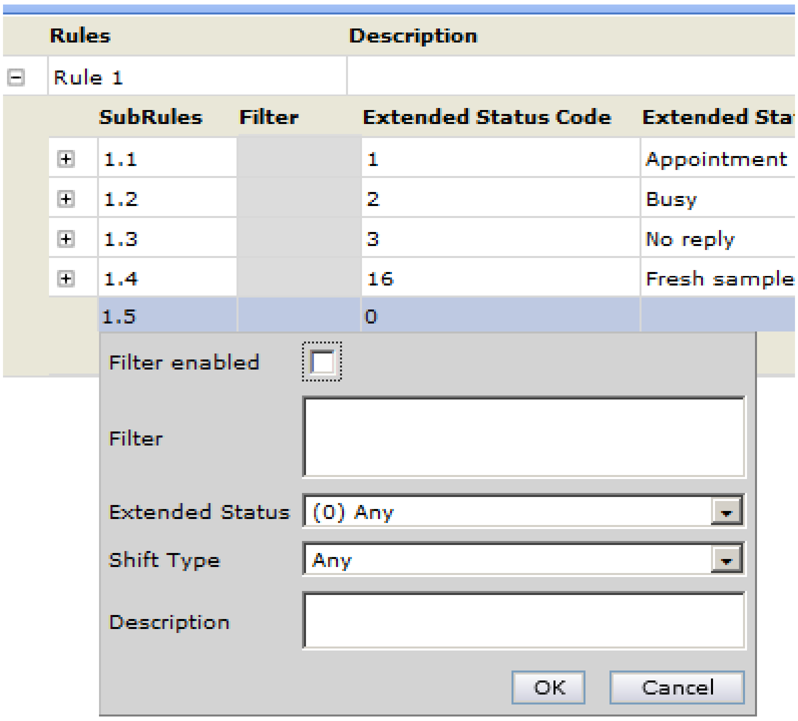


Figure 152 Adding a new subrule

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 OK 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.

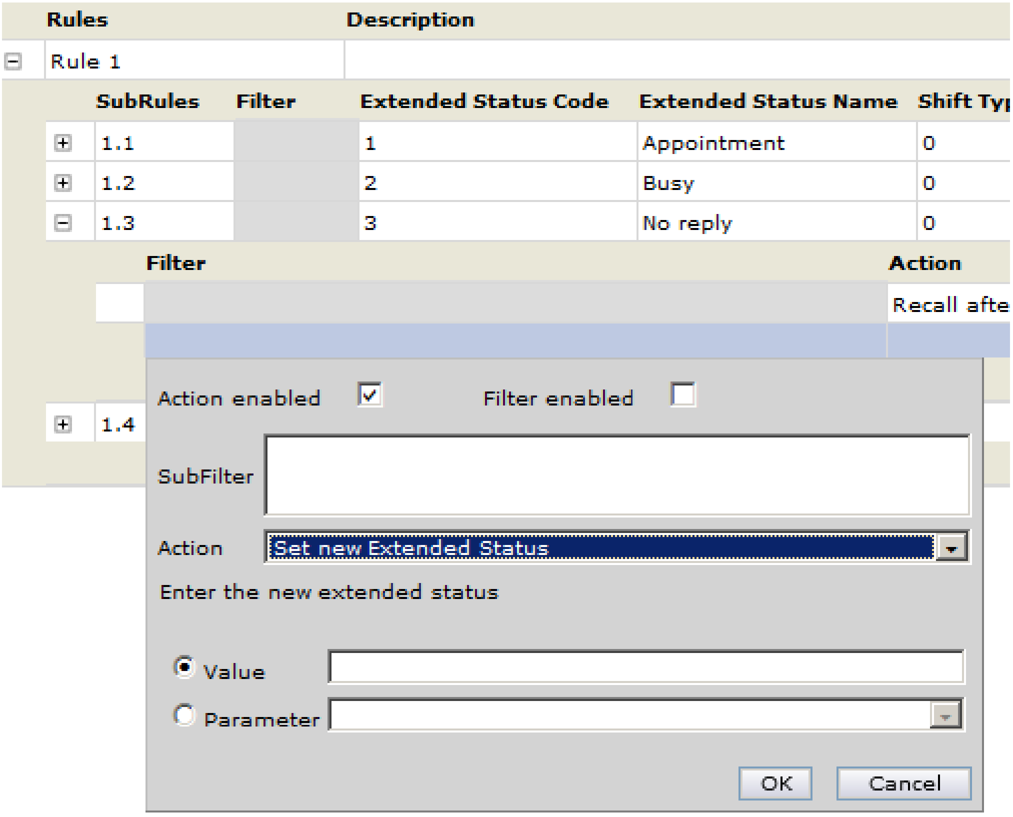


Figure 153 Adding a new action

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 142 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 OK 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.

4.5.3.1 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 131 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.

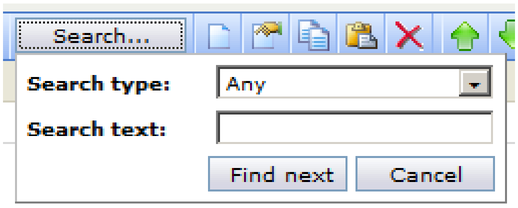


Figure 154 Searching the scheduling rule list

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.

4.5.4 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.

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 74 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 131).
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.

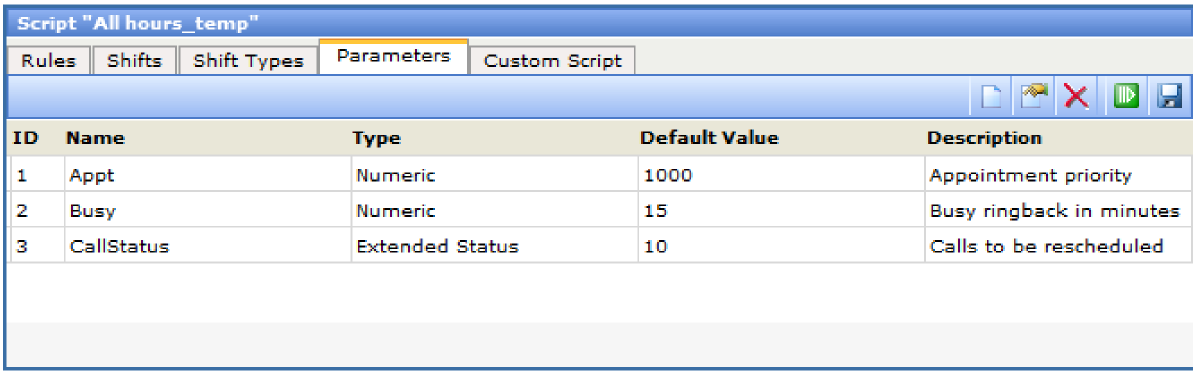


Figure 155 Viewing the scheduling script parameter set

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.

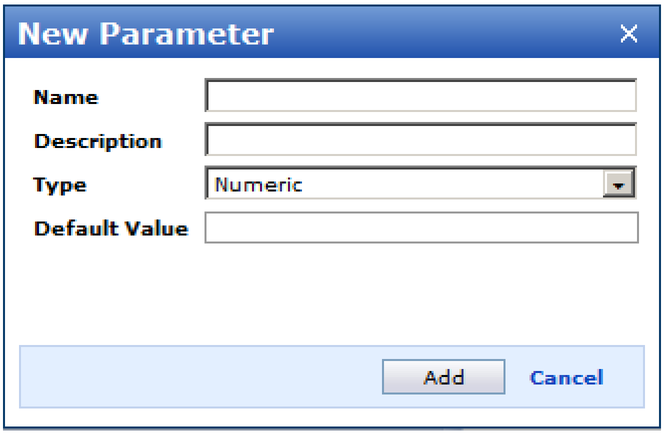


Figure 156 Adding a parameter to the scheduling script

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 291 for reference);
- Shift type - values that are supported for use with the appropriate action (see Appendix A - Action parameter descriptions on page 291 for reference);
- Assignment - values that are supported for use with the Assign User/Group action (see Appendix A - Action parameter descriptions on page 291 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 138 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 131).
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 131).
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 149 and to Launching a scheduling script on page 150 topics for more details.

4.5.5 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 131 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).

4.5.6 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 131 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 150.

4.5.7 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 131 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.

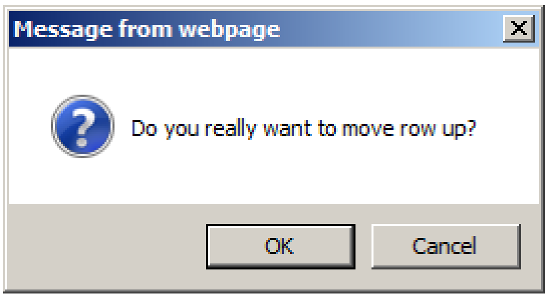


Figure 157 Confirmation dialog for Move operation

   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.

4.5.8 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 138).

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 131 for details), choose the Custom Script tab in the bottom right frame.

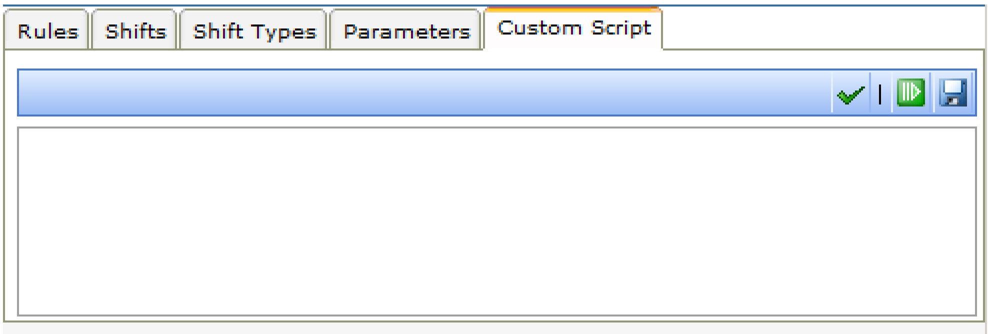


Figure 158 Adding a custom script

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 clip-board 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 146 for object description and code examples.

4.5.8.1 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 "Schedul-ing" object has the following properties:

Type	Name	Description
BvSurveyEntity	Survey	This object provides data for the survey which contains the cur-rent 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);

                }

        }

}
```

4.5.9 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 on the facing page 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.

4.5.10 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 on the previous page), 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 131 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.

4.6 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 127 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.

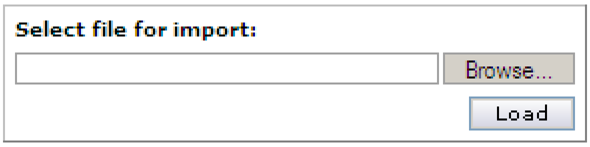


Figure 159 Selecting an XML description of a scheduling script for import

   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.

4.7 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 install-ations 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.

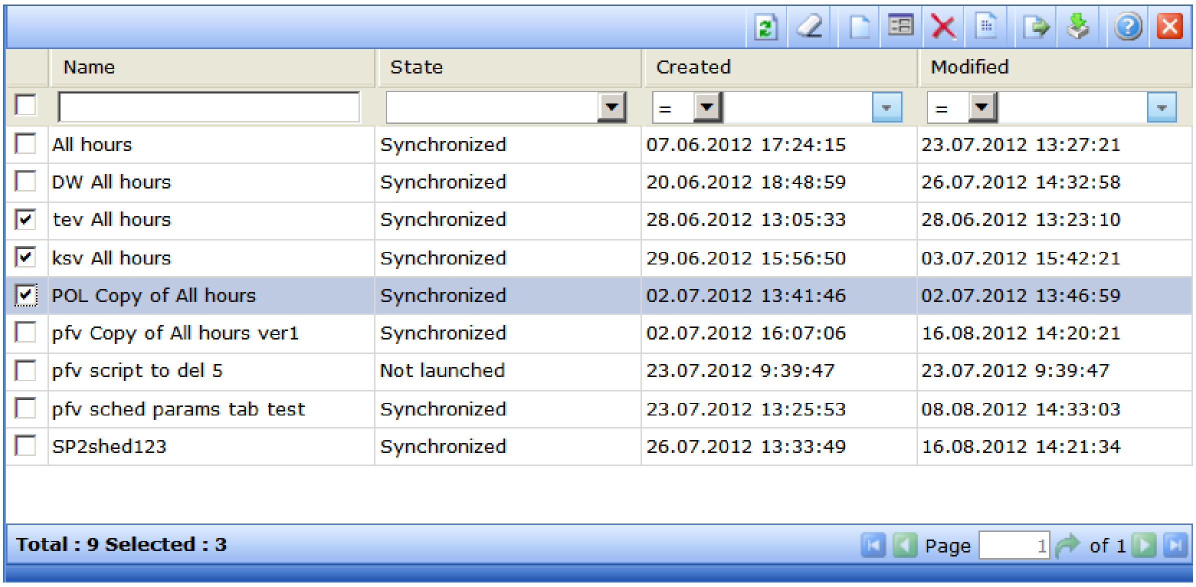


Figure 160 Multiple scheduling script selection for export

   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.

4.8 Deleting scheduling scripts

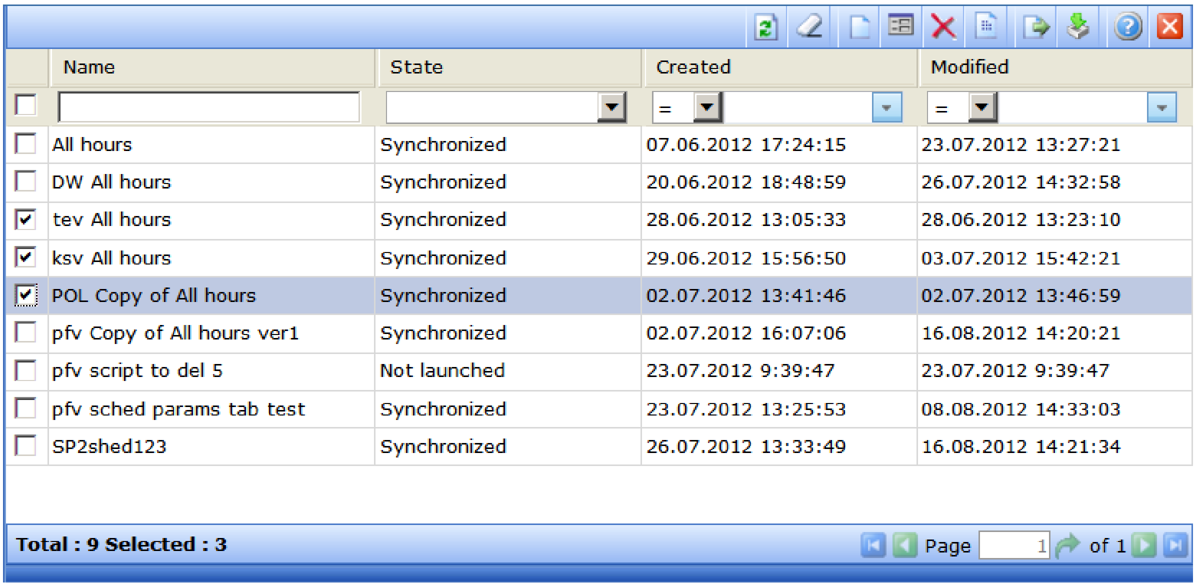
You can discard one or a number of existing scheduling scripts in case you do not need them anymore.

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

Total : 9 Selected : 3 Page 1 of 1

Figure 161 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.

5 Interviewing

Interviewer’s work is arranged and monitored by the supervisor. Supervisor specifies time intervals (shifts) when the interviews should be performed, assigns interviewers and interviewer groups to surveys and interviews, defines the task choice mode for them, and monitors their work. Supervisor is also entitled to terminate any interview, and shutdown the whole survey, if required.

An interviewer works with the separate program module which is called CATI Interviewer Console. The present section describes technique of working with the CATI Interviewer Console.

The CATI Interviewer Console software module installation kit is downloaded from the Confirmit server and CATI Interviewer Console is then installed on a computer from this kit. Installed application is available through the Confirmit group found in Windows Programs menu. Click the CATI Interviewer Console item to start the application.

Do not forget that interviewers who should log in to work with CATI Console must be added to the CATI Supervisor module prior they begin their work. Otherwise they would not be able to provide credentials required for logging in.

CATI Console allows selecting a survey/interview to work with if such is assumed by the task choice mode, or it simply takes an interviewer to the designated interview (in a fully automatic mode).

Telephone interviewing assumes dialing telephone numbers provided in the sample. The dialing routine can either be performed manually (on the side of interviewer), or it can be delegated to a company specializing in providing dialing services. Provider of the dialing services arranges a special dedicated hardware/software complex that carries out all tasks regarding establishing telephone connections that are required to conduct interviews defined by the survey parameters.

The clear and comprehensible console interface makes it easy for the interviewer to interact with the respondent. Prompts are displayed on each interview step, the interviewer can choose between entering answer variants in the text field and selecting predefined options.

On any step, the interviewer has an ability of going back to any of the preceding questions and modifying the answer, if required.

Besides the interviewer can make an appointment for a later call should the respondent ask for a delay.

5.1 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 CATI Console on the same machine you have used to download the installation files.

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 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 bypassing, 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.

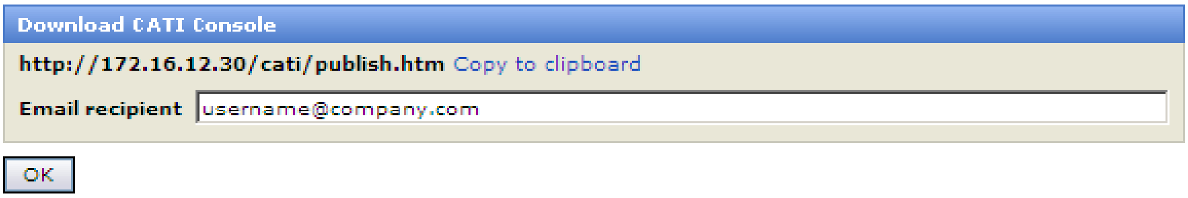


Figure 162 Fetching CATI Console download URL

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.

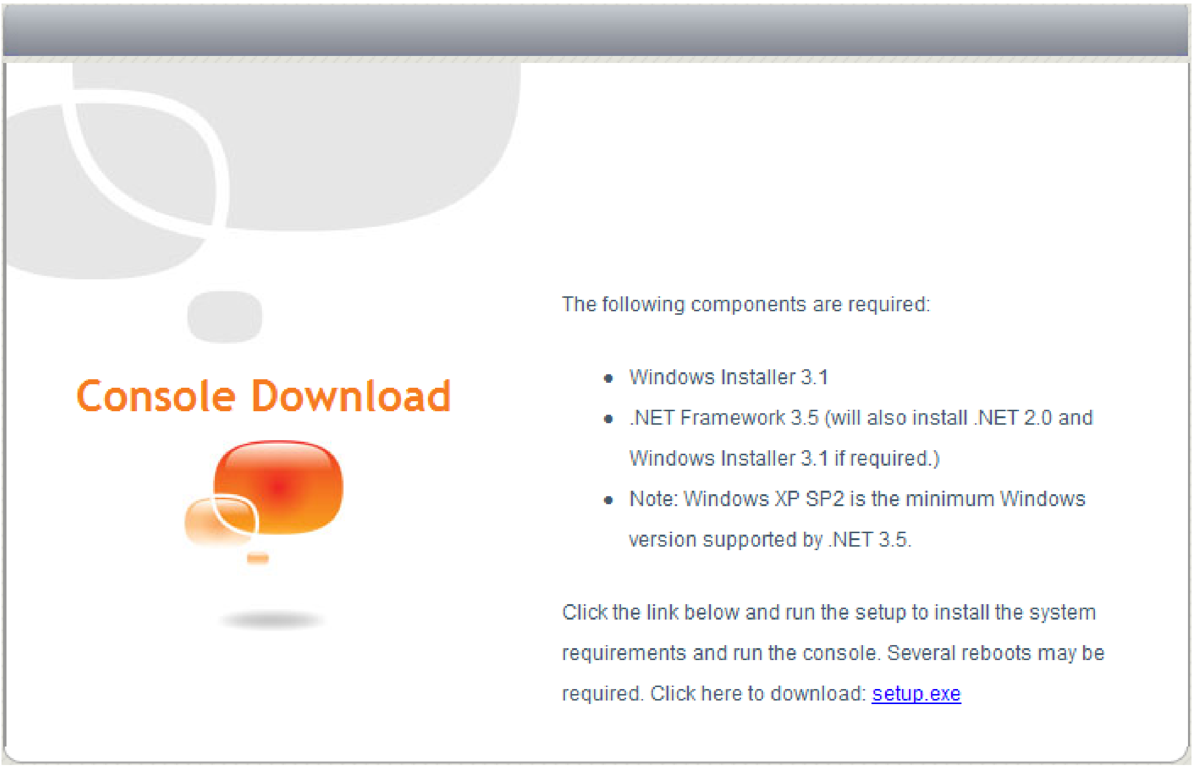


Figure 163 CATI Console download page

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 CATI Console on the next page.

   CATI Console upgrade procedure is described in Upgrading CATI Console on page 156.

5.1.1 Installing a new copy of 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 153 for details).
2. After file download is complete, read and accept the Confirmit License that appears when the installation procedure starts.

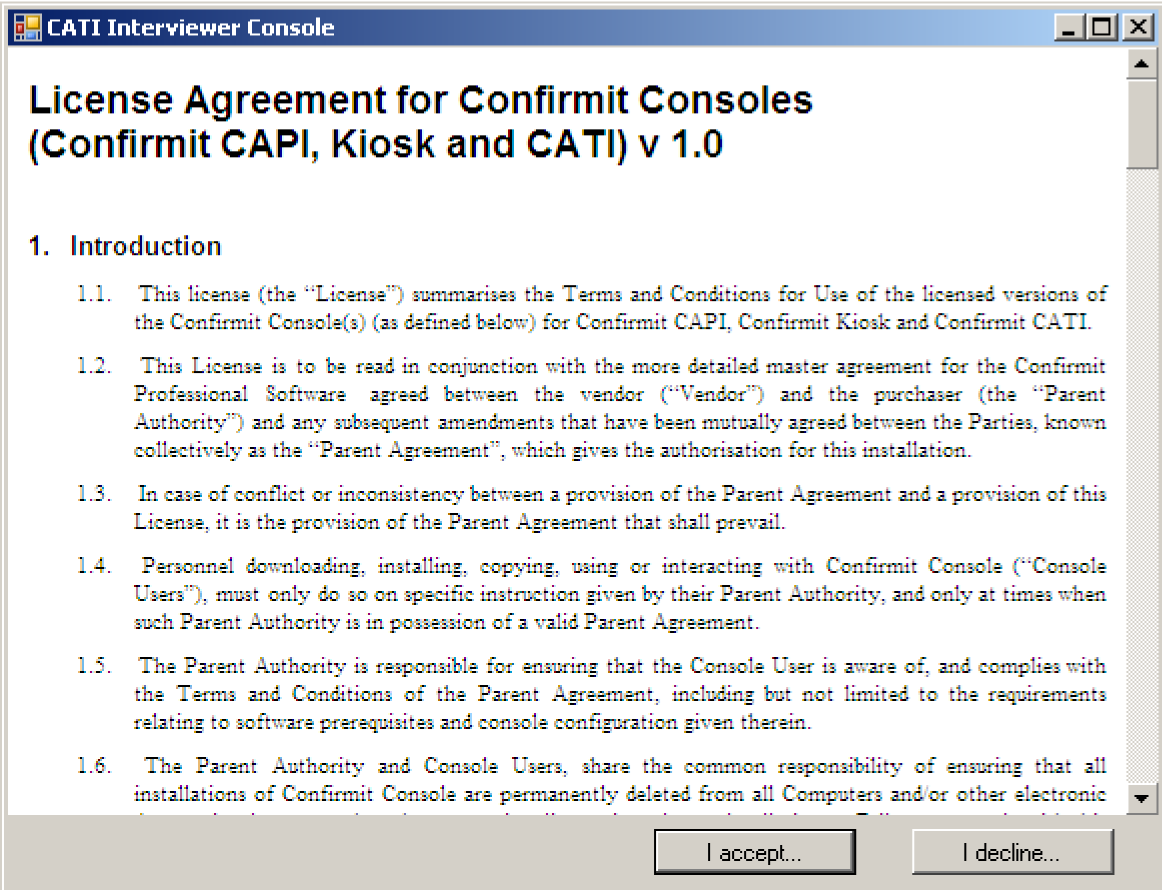


Figure 164 CATI Console License Agreement

3. The dialog window with the progress bar showing the installation progress is displayed after you press the I accept button in the Confirmit License window.

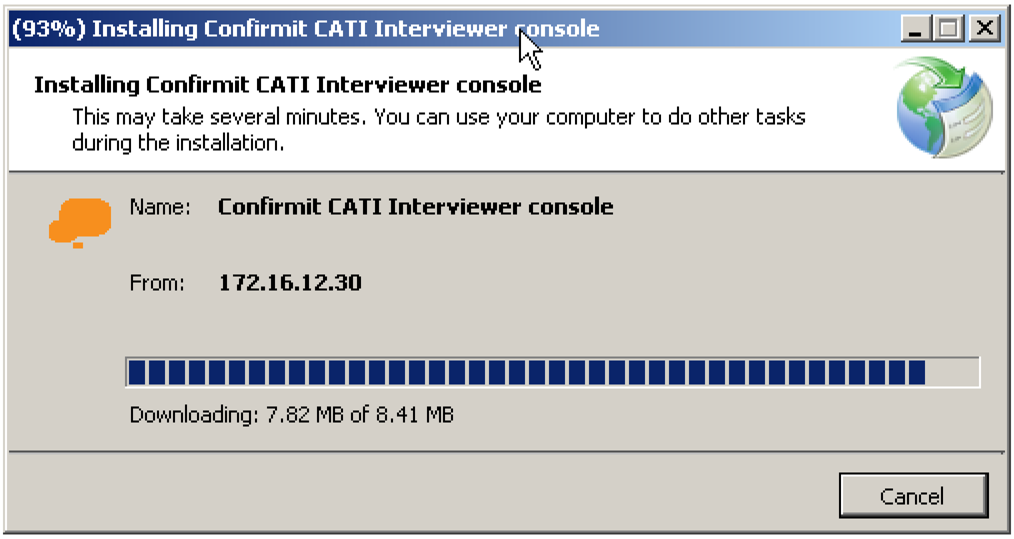


Figure 165 CATI Console installation progress

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 Vista and MS Windows 7 operating systems: C:\ProgramData\Confirmit\CATI\
- For CATI Interviewer Console installed on MS Windows XP operating system: C:\Documents and Settings\All Users\Application Data\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 on page 158 for details), or close CATI Console by pressing the cross button in the top right corner of the Log In screen.

5.1.2 Upgrading CATI Console

CATI Console will be upgraded automatically the first time you log on after the application has been upgraded on the server. The files are copied into your PC and the console is enabled for CATI operations.

How to handle the update announcements:

1. When an update is available for the CATI Console application, you will be notified and prompted to download and install it.

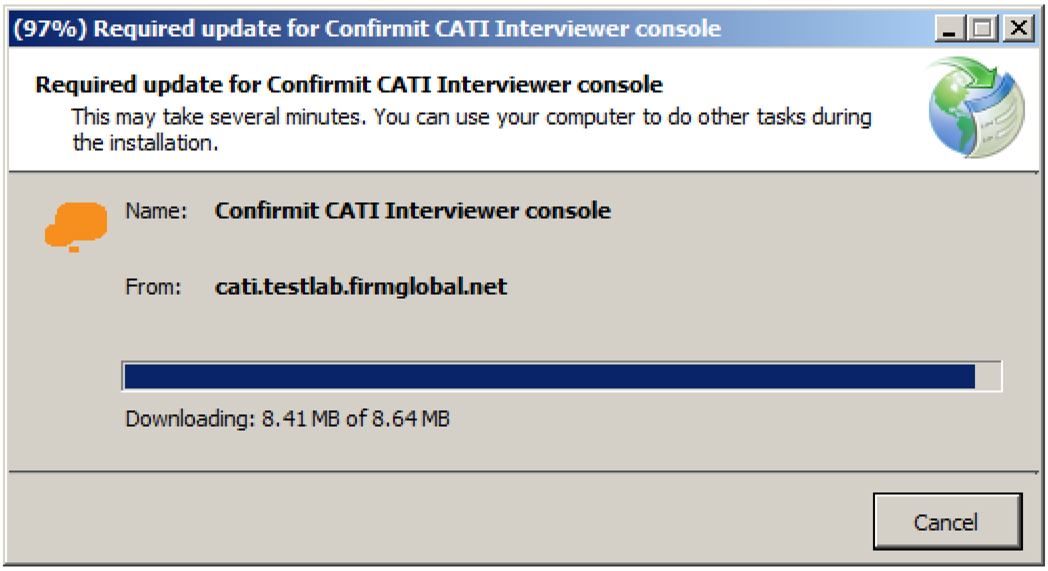


Figure 166 CATI Console update announcement

2. The normal procedure will be to approve the download, wait for the few moments it takes to download and install the update, then continue using your system. If you do not wish to download and install the update when prompted, cancel the prompt dialog.
3. Note that if you refuse the update when first notified, you will be prompted again the next time you log in to work with CATI Console.

Note: Confirmit recommends that you always install automatic updates when prompted to do so by the CATI Interviewer Console application. Confirmit reserves the right to force the installation of critical updates.

5.1.3 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 PC's Start menu > Settings > Control Panel and open the Add or Remove Programs application.
2. Using this, choose to remove the **Confirmit CATI Console** application.

   This action will display the Maintenance dialog window.

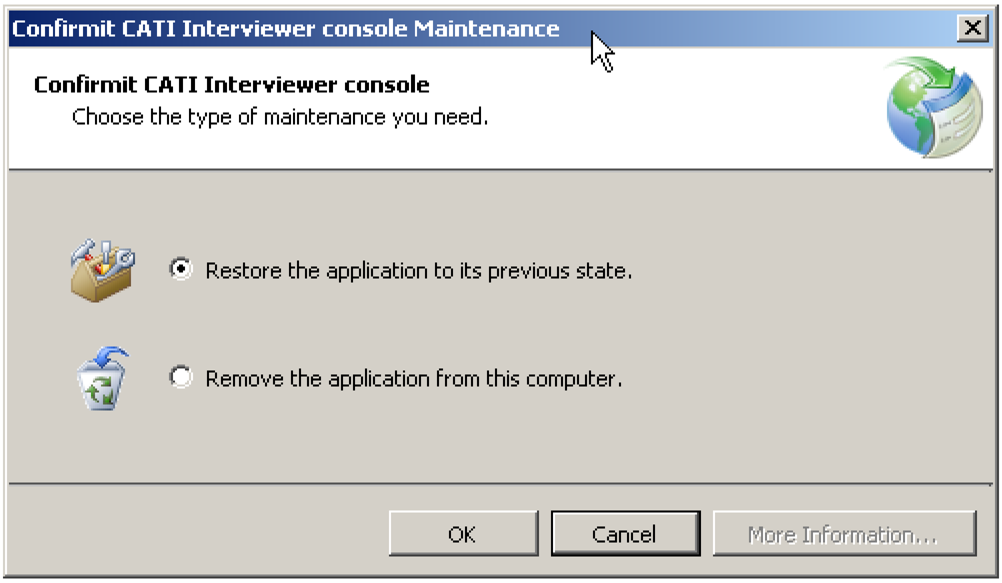


Figure 167 CATI Console maintenance dialog

3. Choose the Restore… option to roll back the previous update (if the application has not been updated, this option will be unavailable).
4. Choose the Remove… option to completely uninstall the CATI Console application from the computer.
5. Press OK to start the chosen procedure, and follow the provided instructions.

5.2 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.

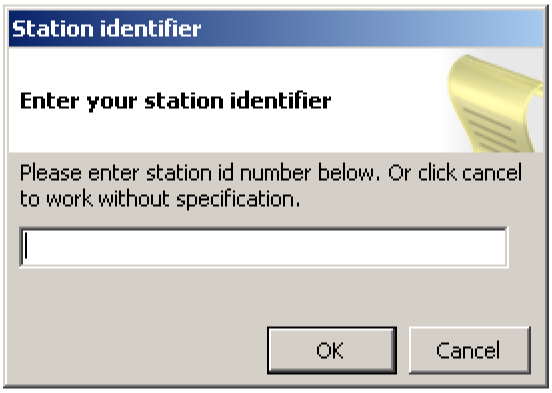


Figure 168 Entering the Station Identifier

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, CATI Interviewer Console displays the login screen.

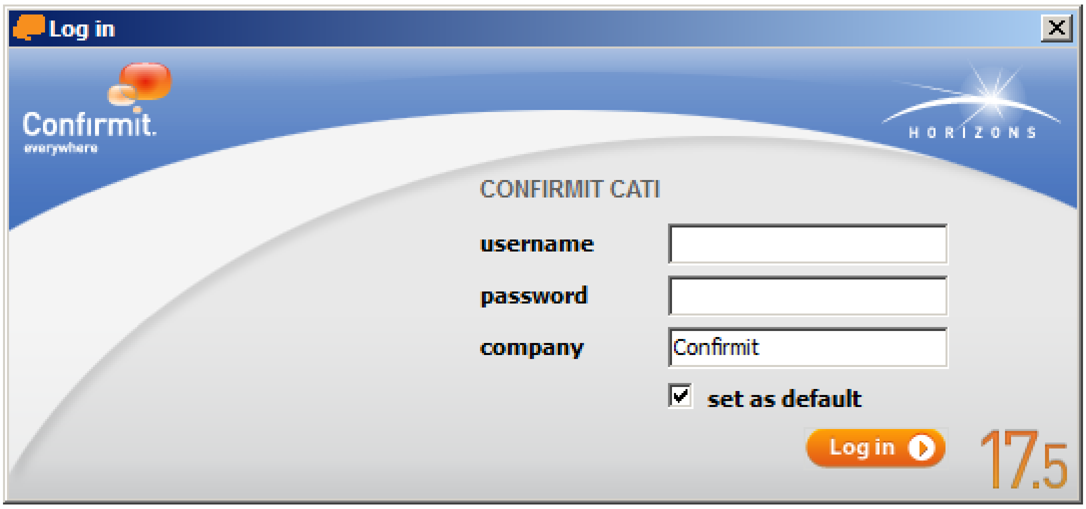


Figure 169 CATI Console - Login screen

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 field). Optionally the interviewer can decide whether this company name would be used as default each time he/she starts 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.

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 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 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 196 for more information on the intentional console shutdown and to Interview terminated by the supervisor on page 197 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 170 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.

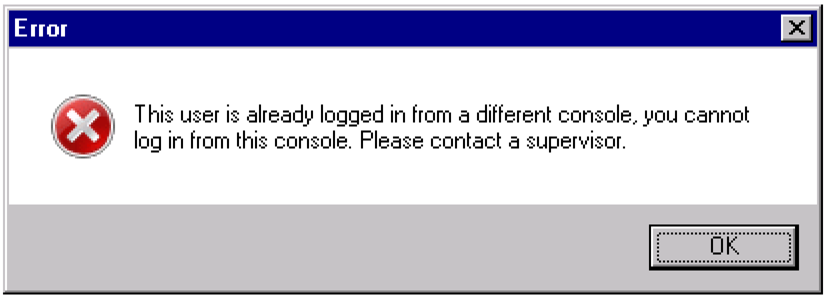


Figure 171 Warning message displayed when the interviewer performs multiple login

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 The Dialer on page 241 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 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).

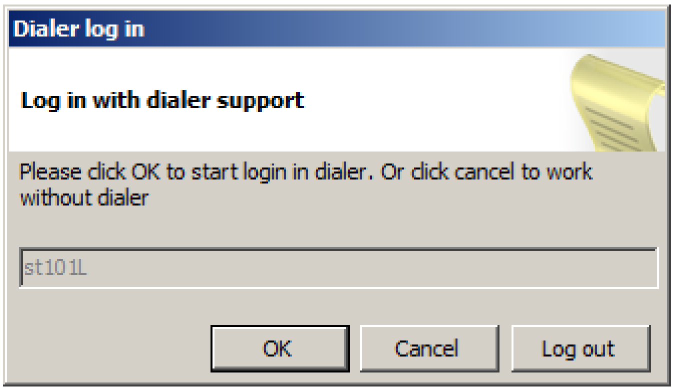


Figure 172 Logging in with or without dialer support

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.

Please mind that all digits in the telephone number must be entered together as a single line, without spaces or other symbols in between.

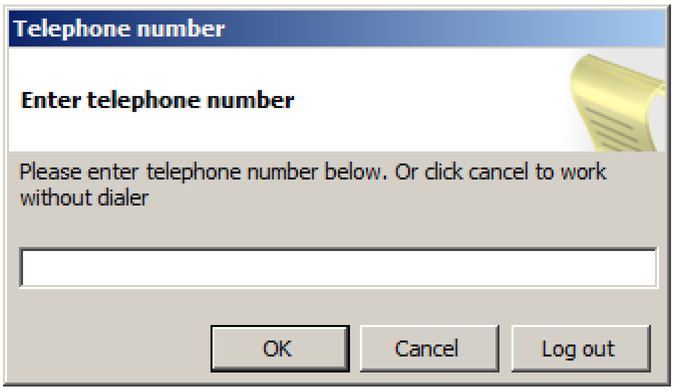


Figure 173 Entering the telephone number for work with the Dialer

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 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 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 165 and Logging Out and closing the CATI Console window on page 197 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 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 165 and Interviewing procedures on page 172 to understand how the work in CATI Console is organized.

5.3 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 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.

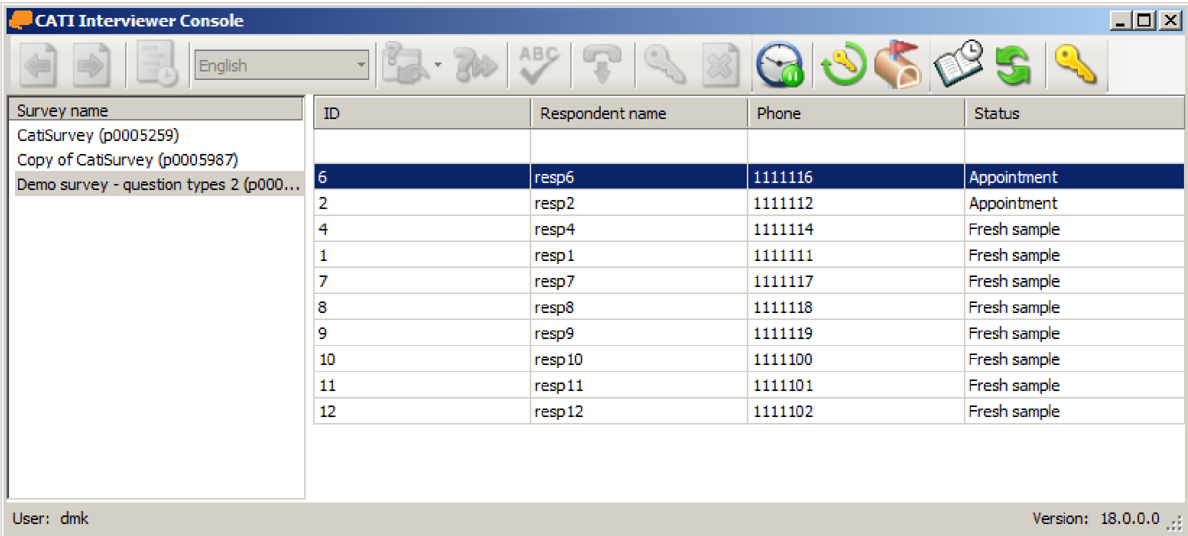
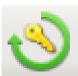
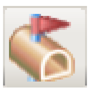
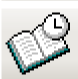


Figure 174 CATI Console - Survey/Interview selection area

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 186 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 170 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 165 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).

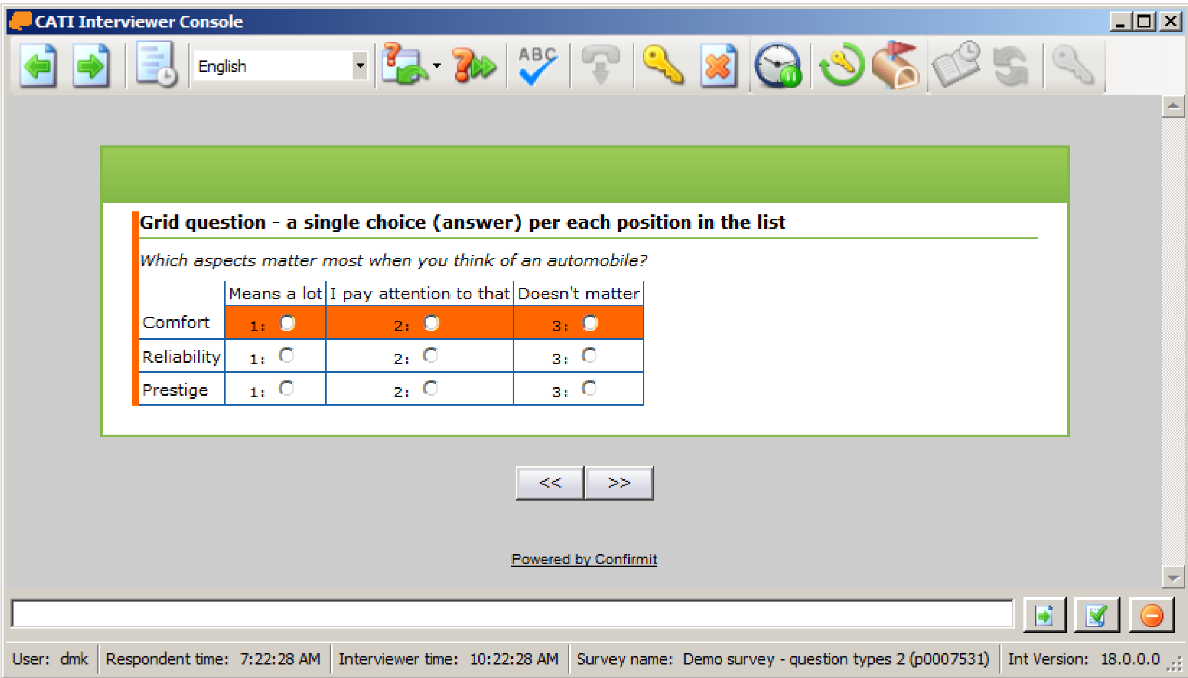


Figure 175 Interview question displayed in the work area

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.
	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 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 CATI Interviewer Console on page 181 for keyboard functionality description, and to Appendix C - The list of hot key combinations used with CATI Interviewer Console on page 297 for a list of hot key combinations available in 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
- Selected survey name and ID
- Selected 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 CATI Interviewer Console on page 181 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).

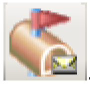
Buttons located to the right of the keyboard entry box allow for the following:

- 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.

5.4 Viewing messages

An interviewer can receive messages from the supervisor in two situations:

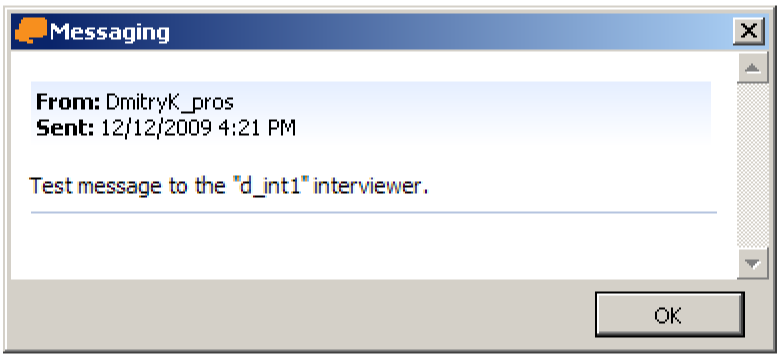
- upon successful logging into CATI Interviewer Console;
- while working with the Console.

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.

5.5 Selecting a Survey/Interview

On successful login depending on the interviewer's choice CATI Console may or may not use the dialer system in processing calls (see Starting the CATI Interviewer Console and Logging In on page 158 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 The Dialer on page 241 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 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 below 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 the next pagefor 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 168 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 170 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 The Dialer on page 241 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, 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 CATI Console after the interview was abnormally terminated, CATI Console will display the following message upon successful login.

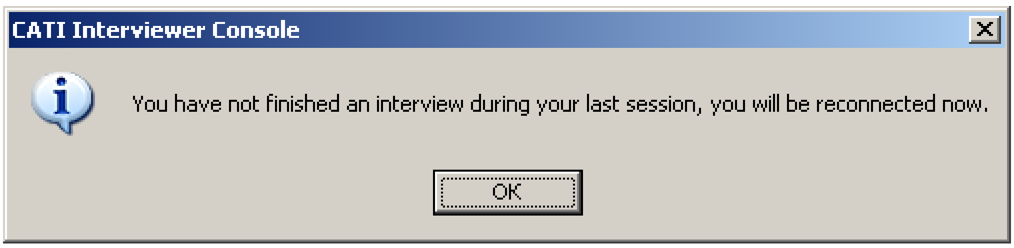


Figure 176 Warning message displayed upon logging in after abnormal application termination

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.

5.5.1 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, 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.

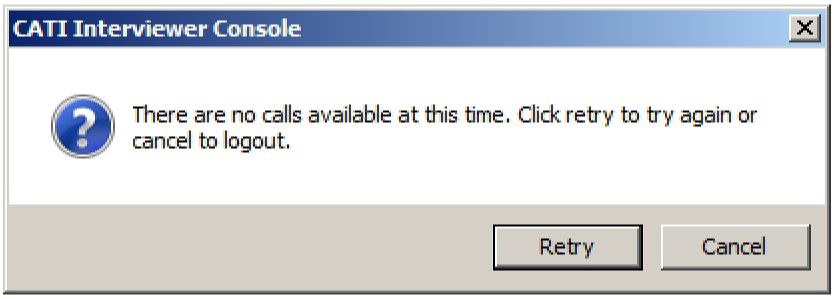


Figure 177 Message displayed upon logging in when no interviews are available

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.

5.5.2 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 CATI Console starts in Survey Selection mode the interviewer is presented with the list of all assigned surveys displayed in the work area.

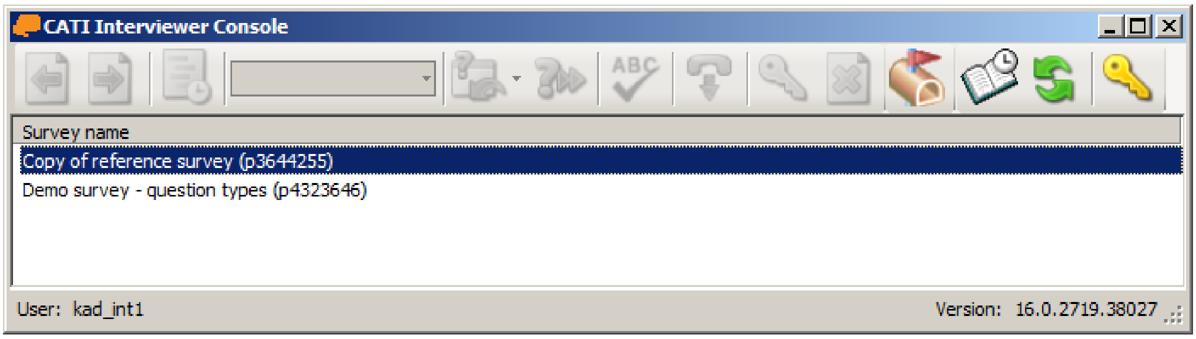


Figure 178 CATI Console - Survey/Interview selection area

The interviewer selects a survey by double-clicking its name in the list, and CATI Interviewer Console starts the first interview from that survey assigned to that interviewer. Since that moment CATI Interviewer Console operates in the Automatic mode – see Automatic mode on the previous page for details. When the first interview is finished, 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, CATI Console displays the following message.

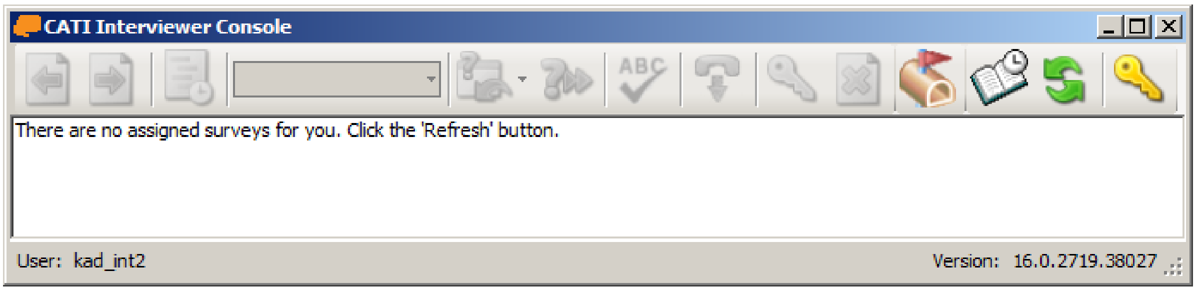


Figure 179 Warning message displayed upon logging in when no surveys are available in Survey Selection mode

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 197 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 CATI Console.

5.5.3 Manual Selection mode

In this mode the interviewer is free to choose any assigned interview from any assigned survey.

When 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.

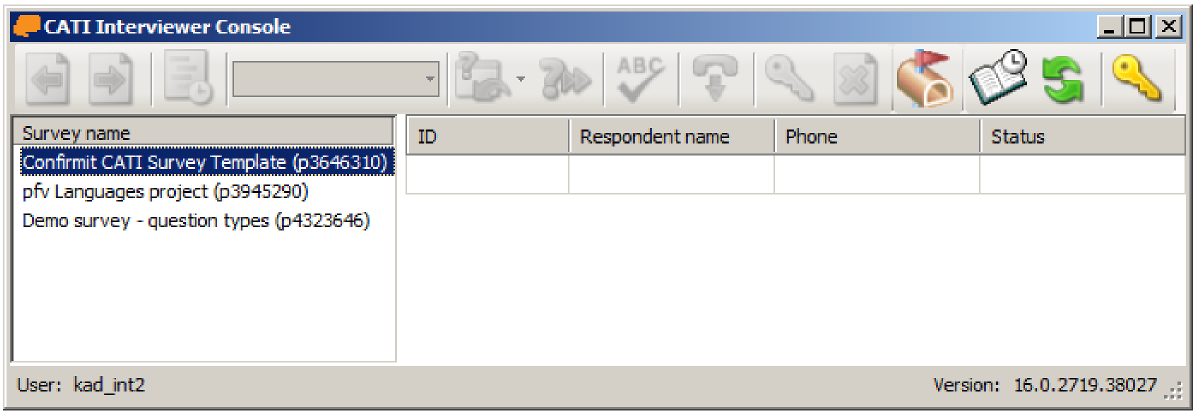


Figure 180 CATI Console - Survey/Interview selection area in the Manual Selection mode

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 73).

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, CATI Interviewer Console displays the following message.

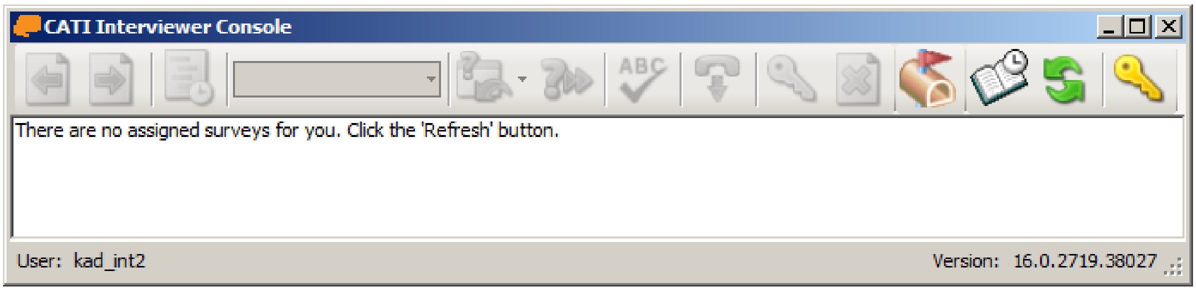


Figure 181 Warning message displayed upon logging in when no surveys are available in Manual Selection mode

At this point the interviewer can either log out of the CATI Console by pressing the Log out button  on the toolbar (please see Logging Out and closing the CATI Console window on page 197 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 CATI Console.

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).

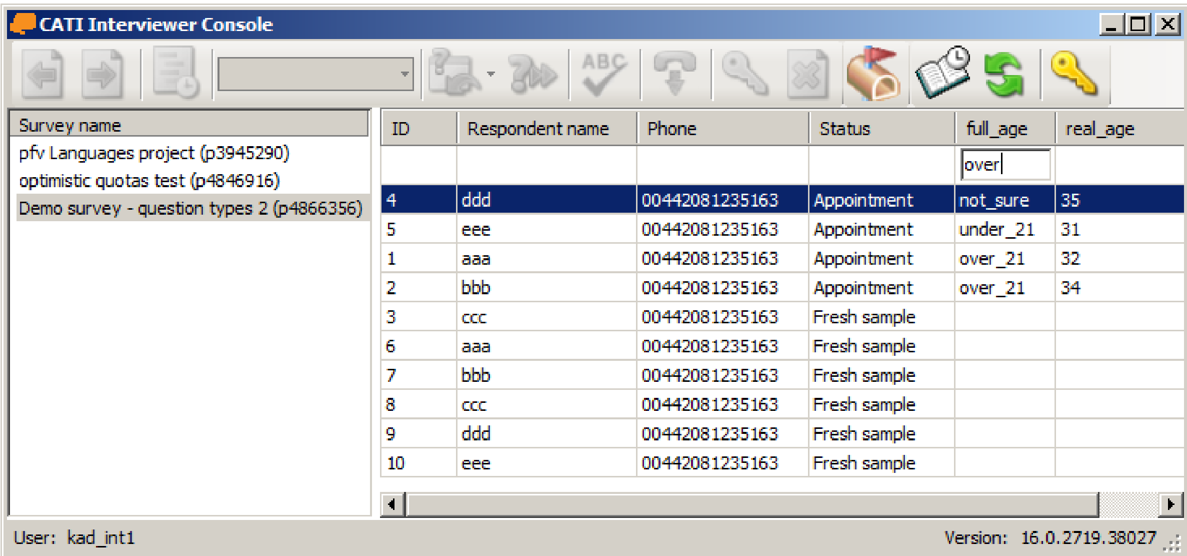


Figure 182 CATI Console - searching for the interview by its parameters

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 - 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.

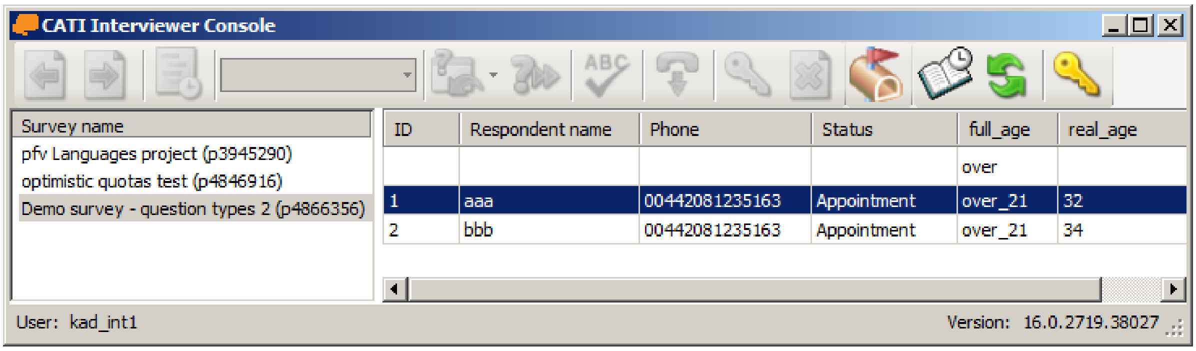


Figure 183 CATI Console displaying the search results

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.

5.5.4 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 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 CATI Console starts in the Choice mode the interviewer is presented with the Login type dialog window.

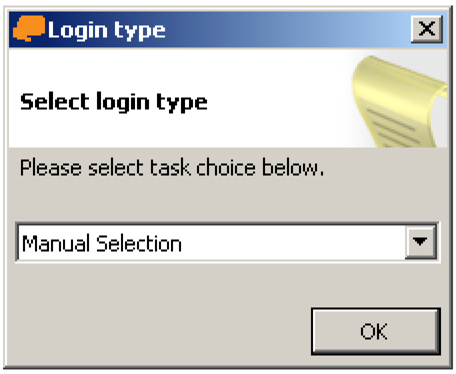


Figure 184 Selecting the task choice mode in the Choice mode

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 166, Manual Selection mode on page 168, and Survey Selection mode on page 167 for information on other task choice modes.

The procedure described above is applied when the interviewer works with the Dialer in use (see The Dialer on page 241). 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 The Dialer on page 241).

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.

5.6 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.

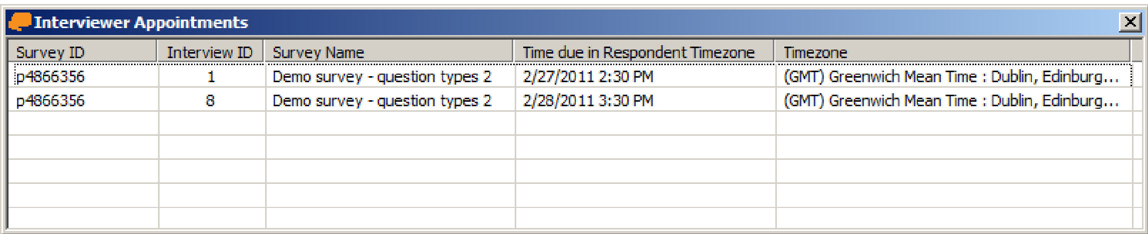
The Interviewer Appointments window shows surveys with interviews for which appointments exist. It also indicates the time on which the appointment is due (or was, in case it is currently overdue).

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.



Survey ID	Interview ID	Survey Name	Time due in Respondent Timezone	Timezone
p4866356	1	Demo survey - question types 2	2/27/2011 2:30 PM	(GMT) Greenwich Mean Time : Dublin, Edinburg...
p4866356	8	Demo survey - question types 2	2/28/2011 3:30 PM	(GMT) Greenwich Mean Time : Dublin, Edinburg...

Figure 185 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 Respondent Timezone – the time (in Respondent Timezone) on which the appointment is (was) due;
- Timezone – the Respondent Timezone name.

The Interviewer Appointments window provides only 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.

5.7 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.

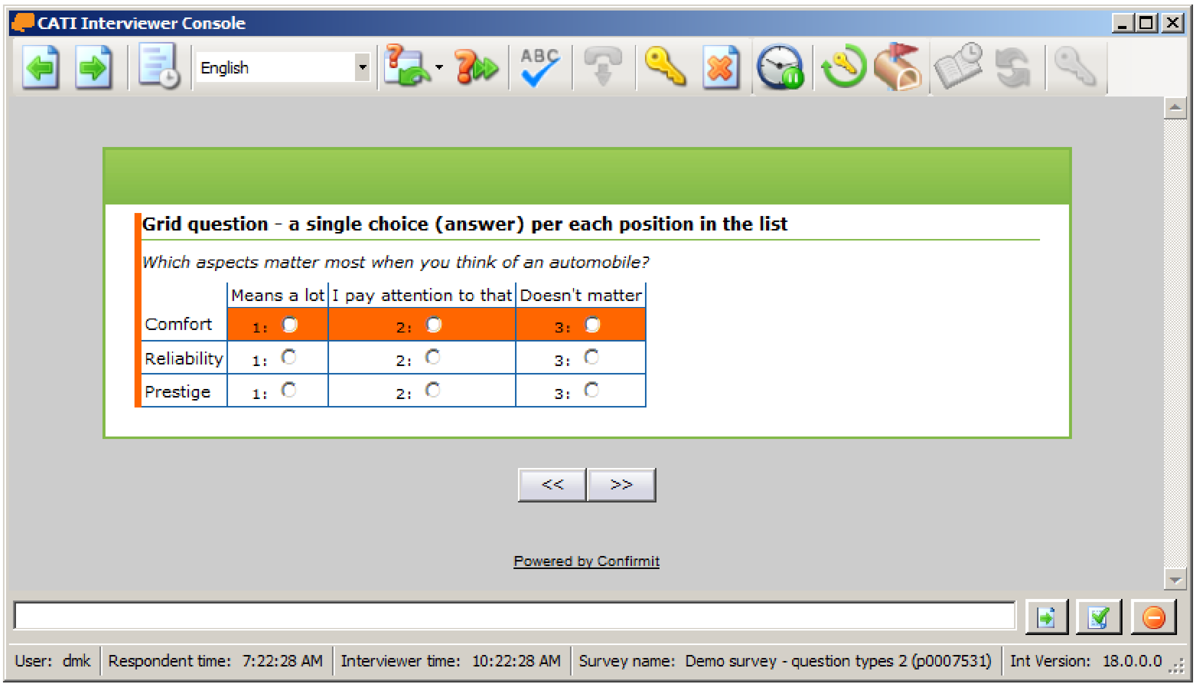


Figure 186 Example of an interview page displayed in the work area - it contains extra info, prompts and a question

Usually the interviewer goes through interview questions in the normal order. This means that he/she asks a question (and lists the answer variants, if required by the question type), 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.

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 he/she has 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).

5.7.1 Going through an Interview

This chapter provides a general description of the interviewing procedure.

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 165 for details.

After 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 can also contain 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.

The current topic describes the basic functionality provided by CATI Interviewer Console. Refer to the topics listed in the See Also section at the end of this topic for description of all available functions.

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 CATI Interviewer Console on page 181, and the basic set of hot key combinations supported by CATI Interviewer Console can be found in Appendix C - The list of hot key combinations used with CATI Interviewer Console on page 297.

In general the interviewing routine goes like this. The interviewer asks the respondent a question and lists all answer variants if needed (actually he/she reads 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.

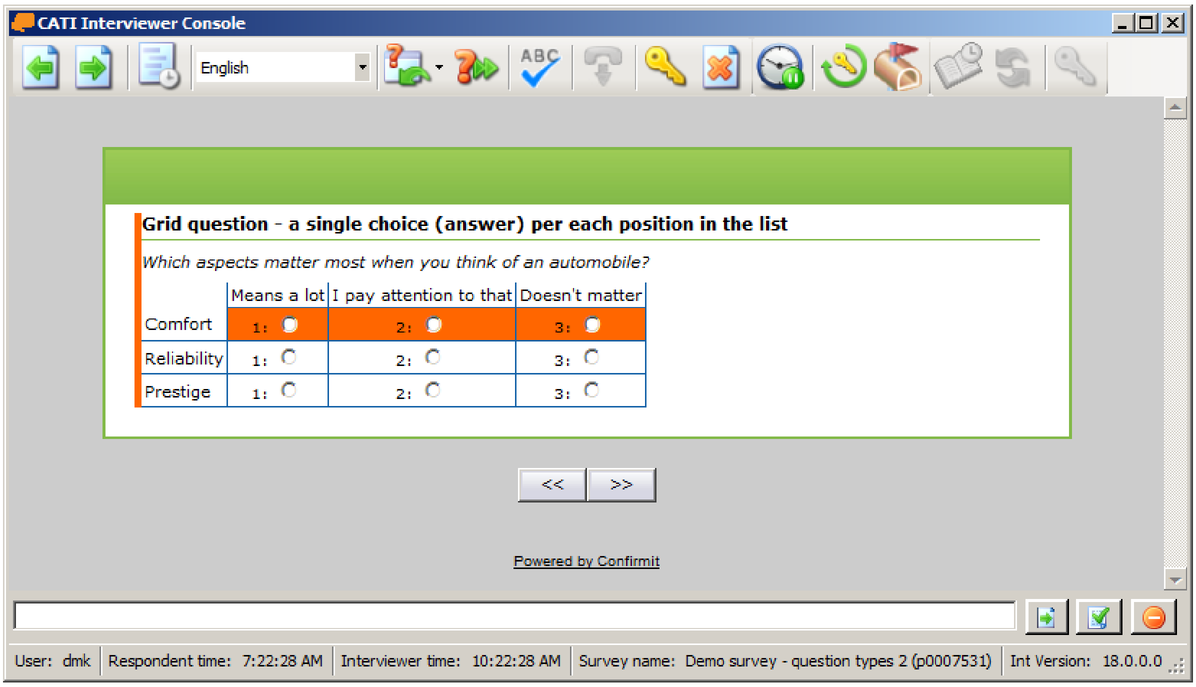


Figure 187 Selecting an answer to the question

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) 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 CATI Console marks the matching answer variant in the list.

Also 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.

To move to the next question the interviewer should press the Next button. Alternatively the following hot key combinations can be used – Right cursor key, or PgDn. CATI Interviewer Console displays the next question after the Next button is pressed.

If this is not the first question in the interview, the Back button usually appears in the work area.

Pressing the Back button will take you one question back. Alternatively the following hot key combinations can be used – Ctrl+Backspace, or Left cursor key, or PgUp.

The interviewer also has an option of returning back to one of the previous questions by pressing the Back button as much times as required to get to that question. This can be done, for example, to correct the provided answer (another way to get "n" questions back in the interview is described below).

The interviewer can also 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 located 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.

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 191 for instructions).

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 combinations can be used – Ctrl+Enter.

If a loss of connectivity occurs during the interview, CATI Interviewer Console displays the appropriate warning message in the working area, like in the picture below.

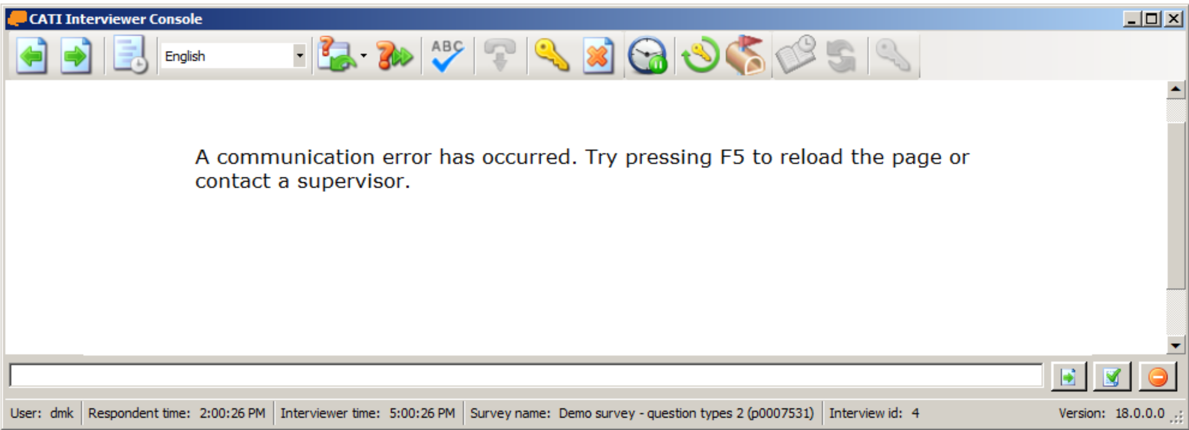


Figure 188 Warning message displayed in Console upon connectivity loss

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, making pauses 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 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 contexts. The list of the dialer related error messages can be found in Appendix G - The list of dialer related error messages on page 303.

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 is 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 186 for more information on taking a break.

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 187 for details.

Also the interviewer may decide to log out of the CATI Console after the current interview is over. To do that he/she 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 197 for details).

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 196 for details).

The interview is considered finished when all interview questions are answered – see The finished interview on page 186 for details.

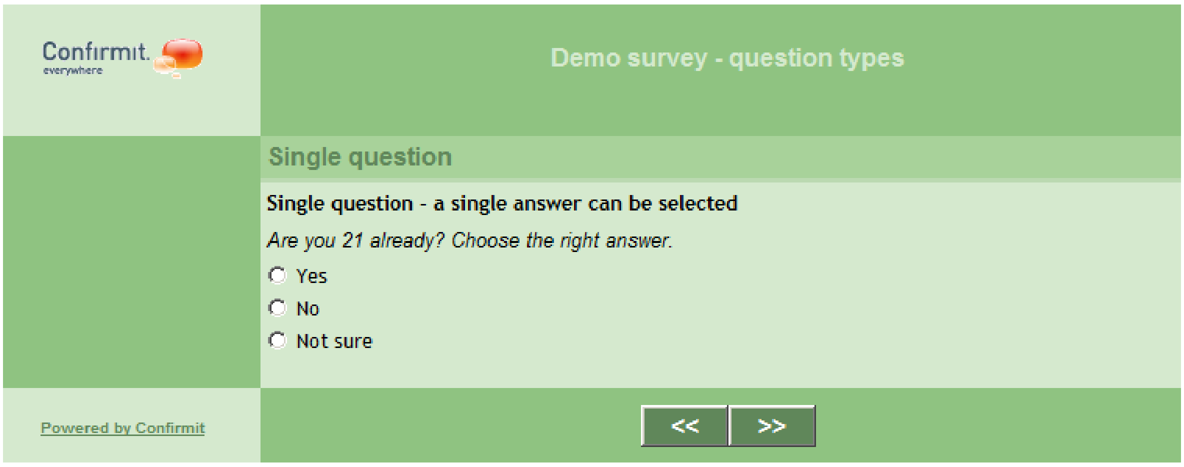
5.7.2 Question Types

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.

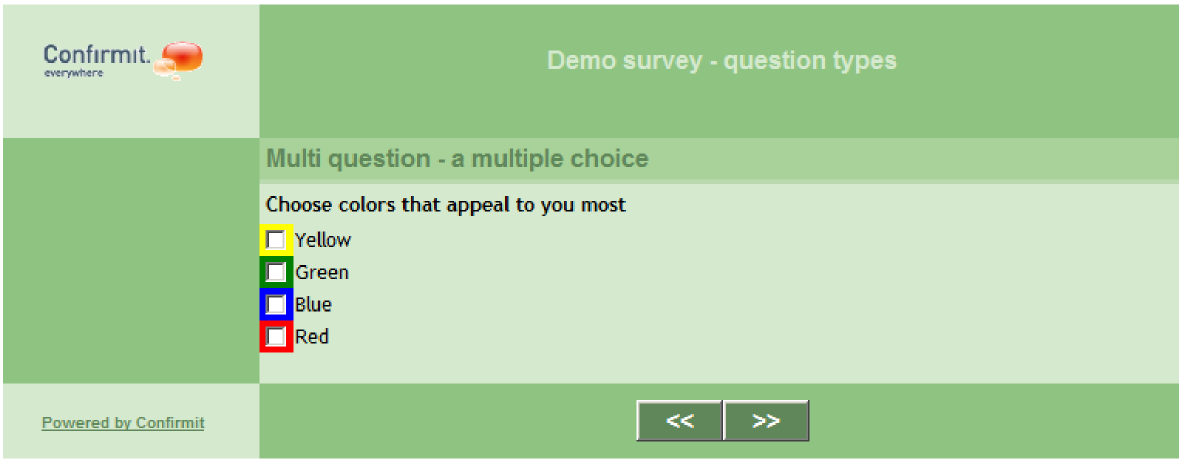
There are 10 basic question types that you can come across in an interview. Of course, not necessarily all of them can be met in a single interview.

These are the question types used in Confirmit surveys.

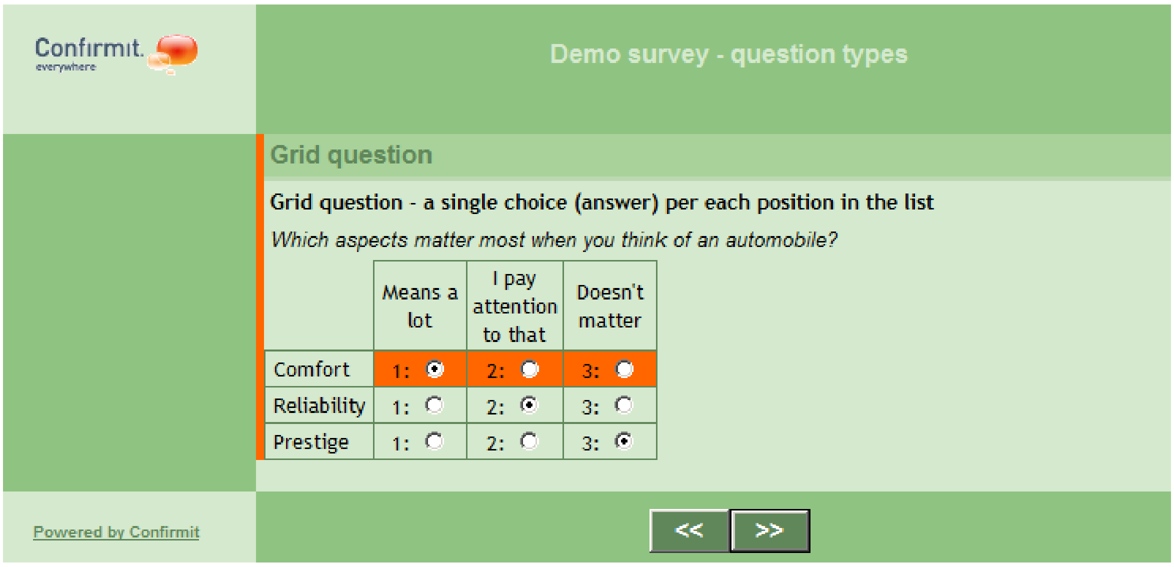
- **Single** question - a single-answer question. You can select only one answer from a list. Can be presented in a form of a radio button list, or as a drop-down list (show me);



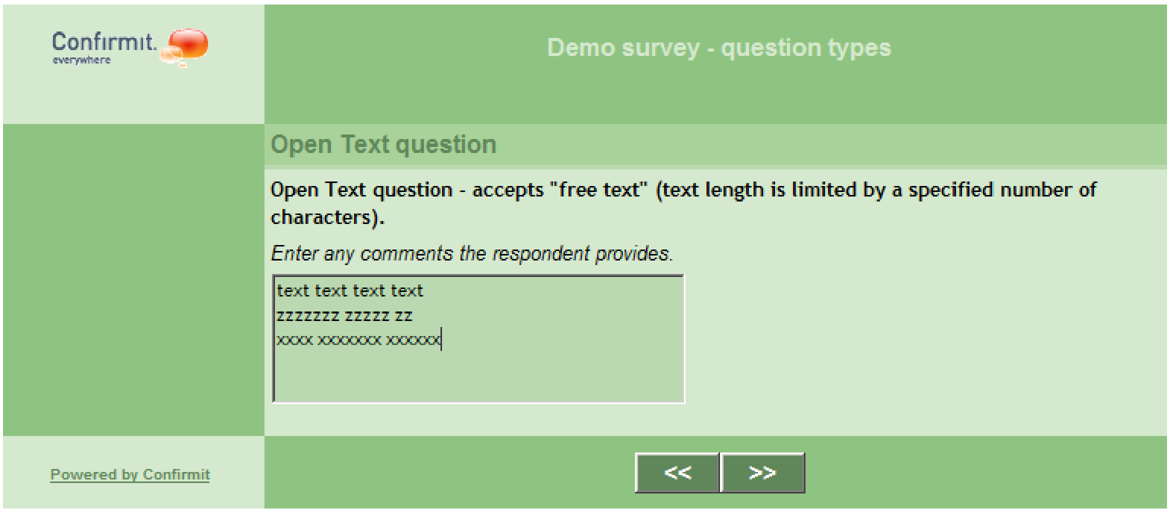
- **Multi** question - a multi-answer question. You can select several answers from a list. Usually presented as a checkbox list (show me).



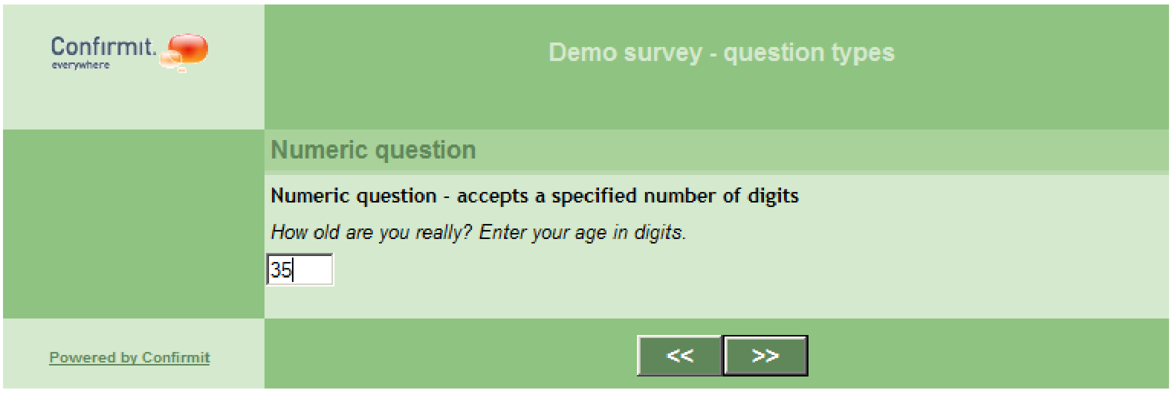
- **Grid** question - a question type that lets you evaluate a list of items along a scale. This question is presented in tabular format, where you can select an answer on a scale. This type of question is typically used to give products or statements a rank or score on a scale (show me).



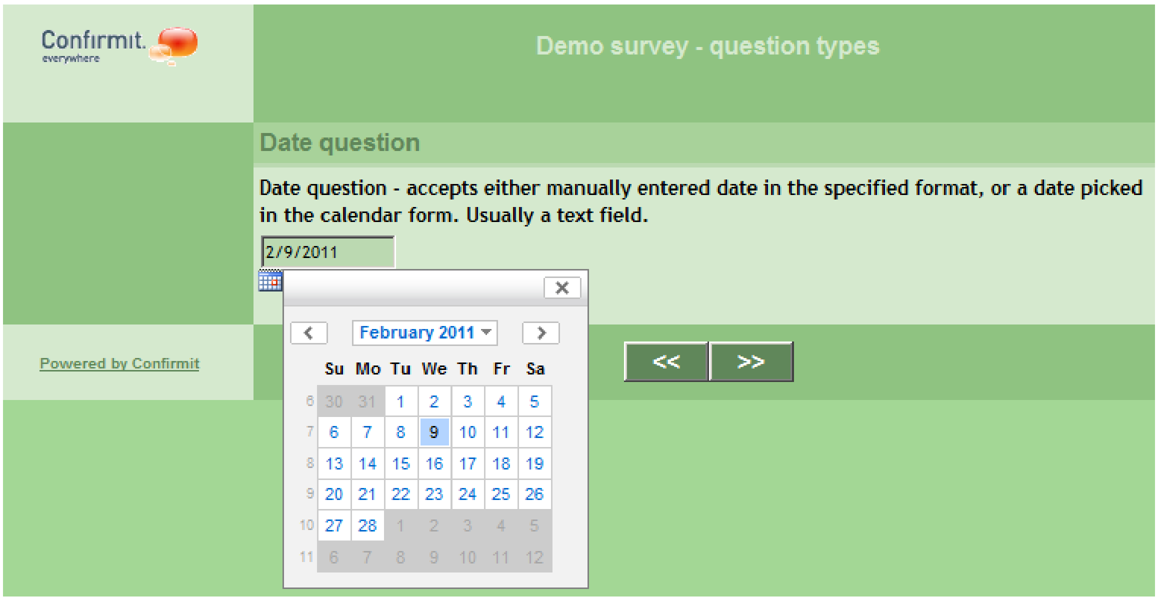
- **Open Text** question - a question type that allows you to type in the response using "free text". Simply a text box (show me).



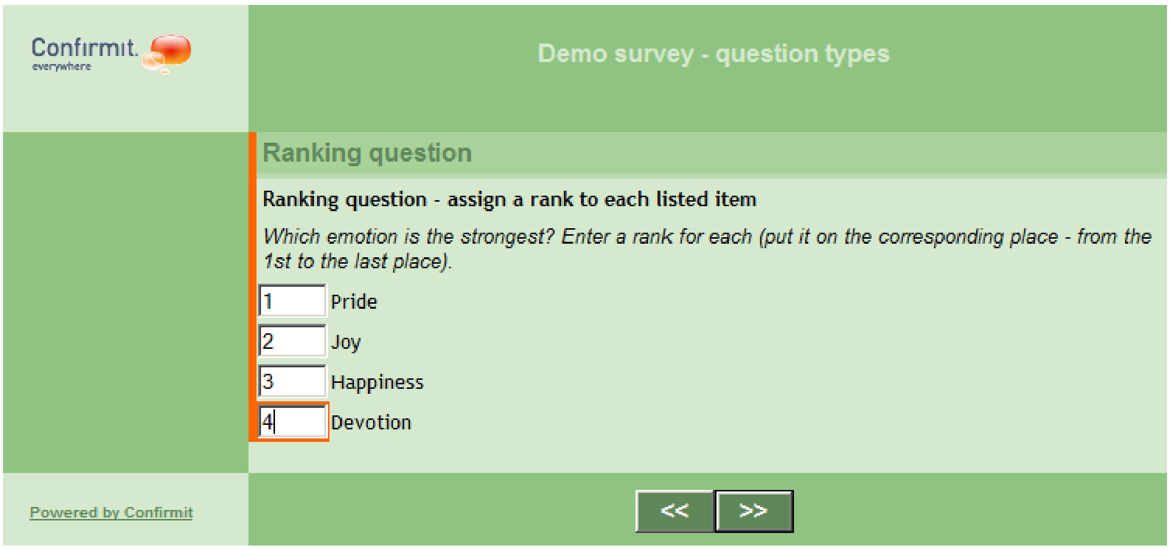
- **Numeric** question - a question type that allows you to type in numerical answers. A text box which accepts only numeric characters (show me).



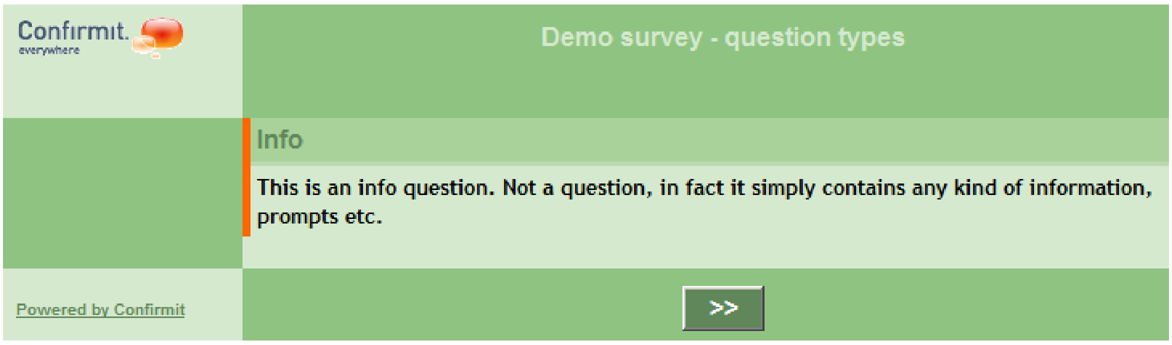
- **Date** question - a question type that allows you to input a date as the answer. A special button beside the text box displays the calendar using which you can select a date. Selecting a date using the calendar is the best way since it guarantees that the date is entered in the correct format (show me).



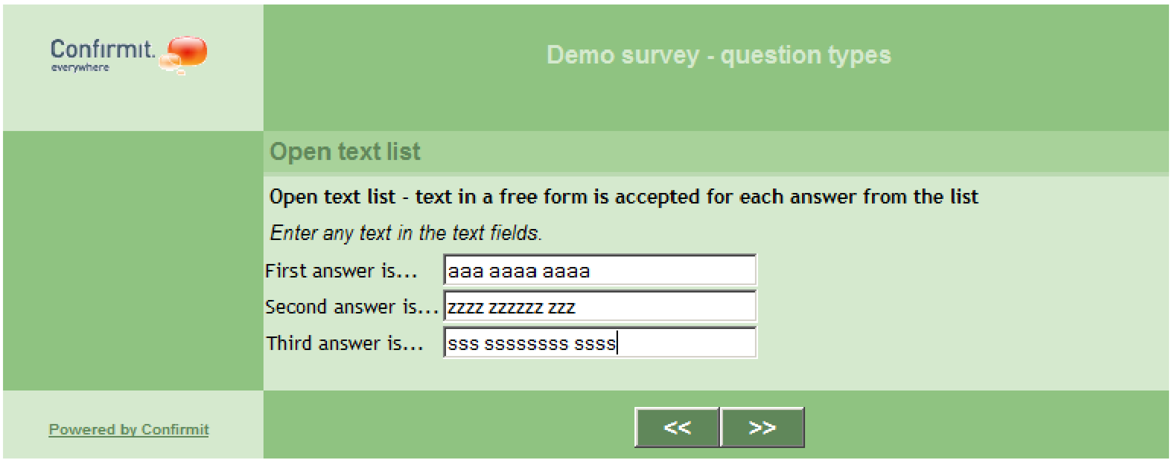
- **Ranking** question - a question type that allows you to rank a list of options, for example to place them in order of preference. A list of items accompanied by text boxes. For example, to rank a list of eight cars you must type 1 into the box beside the car you liked the most, 2 into the box beside 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).



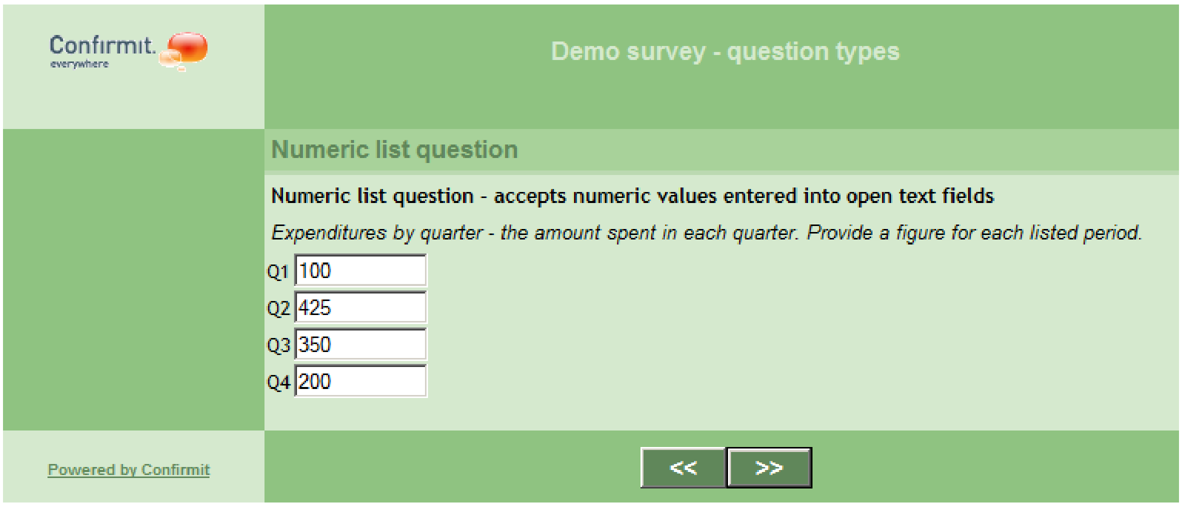
- **Info** question - not a question in fact. This is just an information area. No input is required (show me).



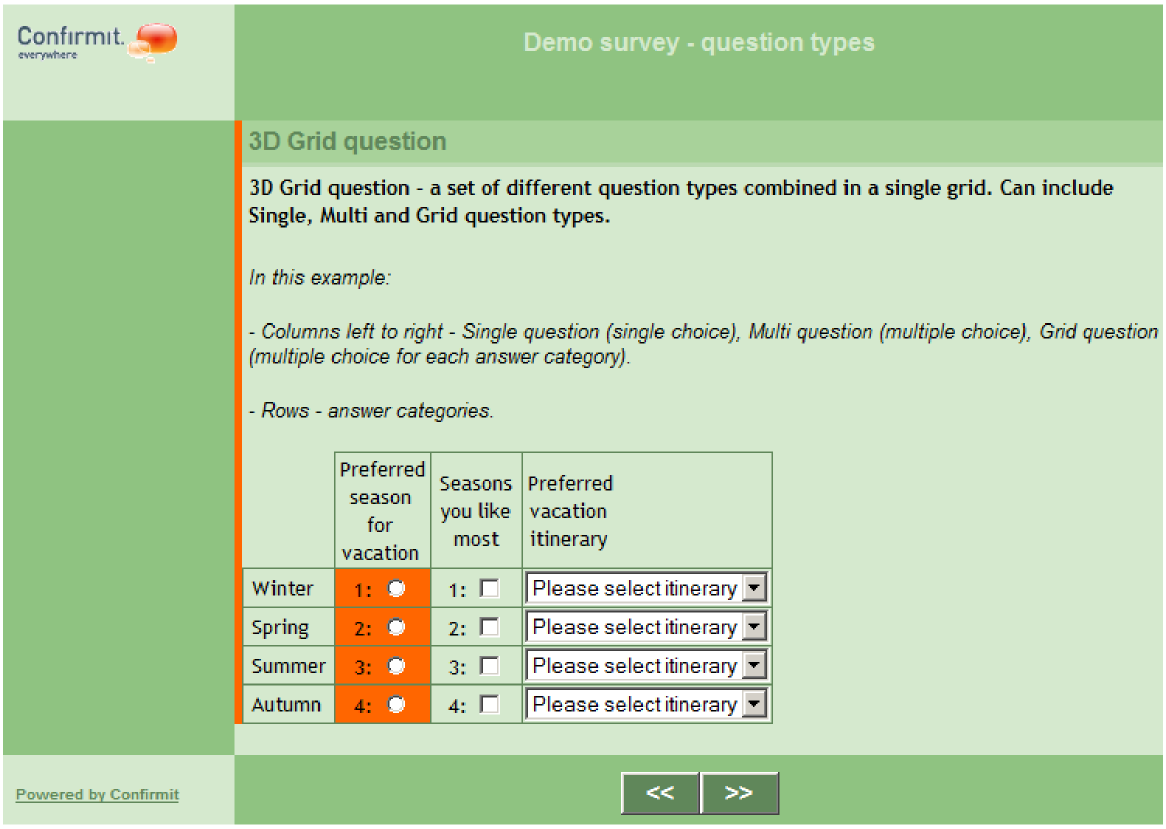
- **Open Text List** question - a question type that allows you to type "free text" against a list of options, for example to add comments to a list. This is a set of Open Text questions combined in a single question (show me).



- **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.

5.7.3 Keyboard support in 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 176.

Keyboard commands corresponding to a certain CATI Console functionality are listed in the corresponding topics.

5.7.3.1 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.

5.7.3.2 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.

5.7.3.3 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 297.

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.

5.7.3.4 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

5.7.3.5 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 186 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.

5.7.3.6 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.

5.7.3.7 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.

5.7.3.8 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.

5.7.3.9 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.

5.7.3.10 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.

5.7.3.11 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.

5.7.3.12 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.

5.7.3.13 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.

5.7.4 The finished interview

Sometimes the interviewer needs to understand that the interview he was conducting is now finished.

Most of the times the interview is considered as finished when its extended status changes to "Completed" or "Terminated".

NOTE In fact only the CATI system determines whether the interview is finished. This may depend on the survey logic designed by the survey author, or on other factors.

Basically we may say that when the next interview can be started, the previous one can be considered as finished.

For the interviewer this means that when he/she moves forward from the last interview page (presses the Next button), or terminates an interview, and CATI Interviewer Console behaves in the way that is described below, he/she can consider the interview as finished.

When the interview is finished, the CATI Interviewer Console depending on the task choice mode will display:

- The first question of another interview, if an interview is available (in Automatic and Survey Selection task choice modes);
- The Survey/Interview selection page (in Manual Selection task choice mode);
- In all task choice modes, when all interviews assigned for the current interviewer are finished, CATI Console behaves the same way as it does when the Interviewer logs in to work with the system and there are no interviews assigned for him (see Automatic mode on page 166, Survey Selection mode on page 167, and Manual Selection mode on page 168 for details).

Please see Logging Out and closing the CATI Console window on page 197 for information on logout options.

5.7.5 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 183 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 Breaks report on page 272, Generating the Interviewer Productivity Report on page 268).

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 206 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).

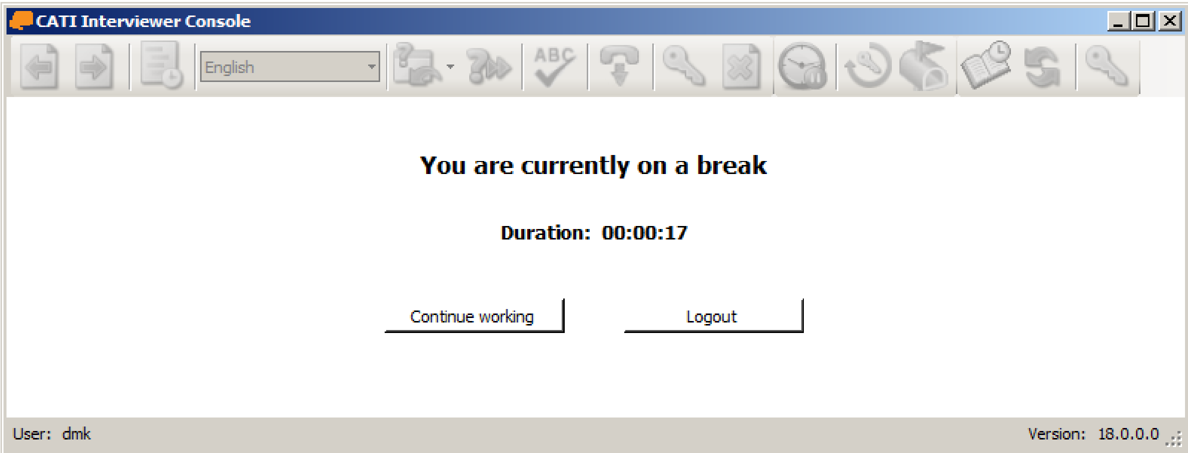


Figure 189 CATI Interviewer Console indicating the interviewer has taken a break

   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.

5.7.6 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.

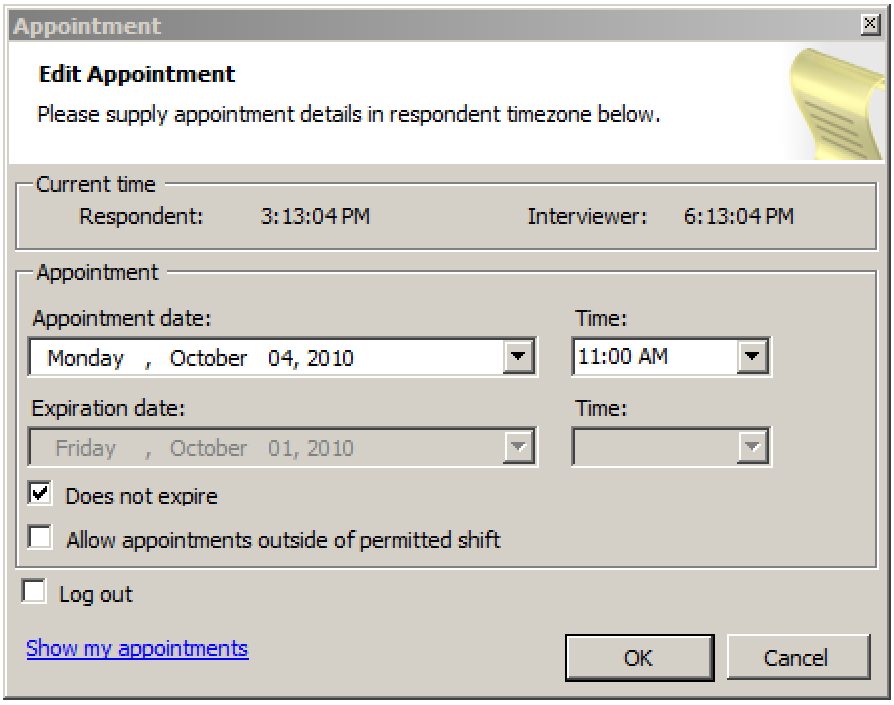


Figure 190 The Appointment dialog window

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 from.

Figure 191 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.

The Time drop-down field allows choosing from the list of predefined times in a half an hour increment.

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 he should tick the Allow appointments outside of the permitted shift checkbox. It does not matter if he/she does 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.

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 171 for information).

8. Finally press OK in the Appointment dialog window to confirm the appointment time and close this dialog window.

   After the dialog window is closed CATI Console will act the same as it does when an interview is finished (see The finished interview on page 186 for details).

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.

5.7.7 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.

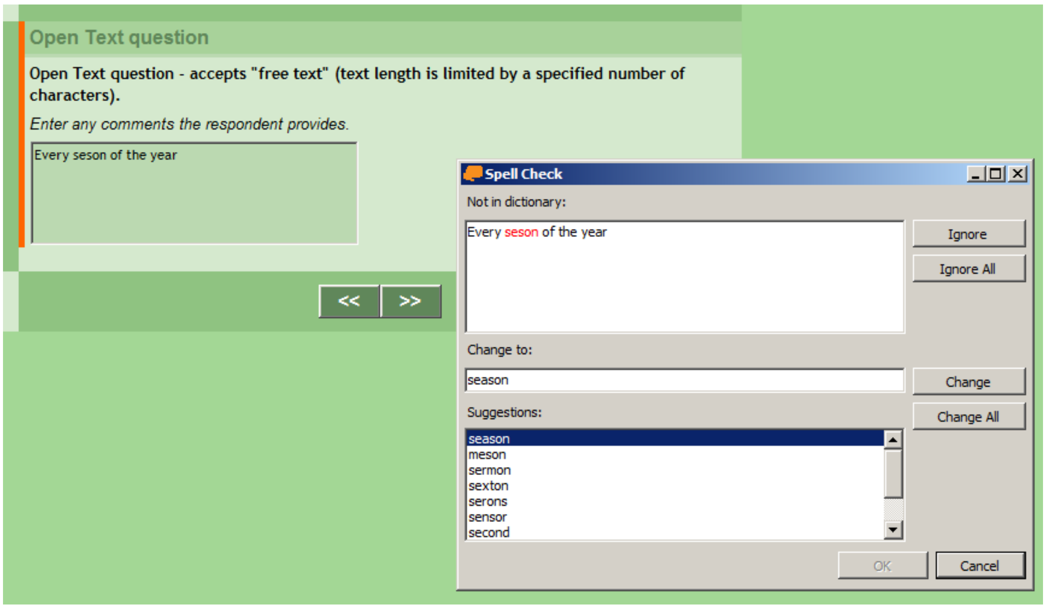


Figure 192 The Spell Check dialog window

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.

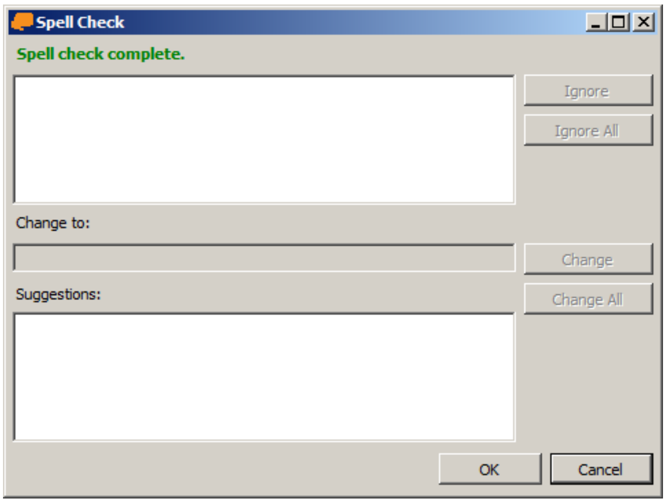


Figure 193 Spell Checker - when the spell checking procedure is completed

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).

5.7.8 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.

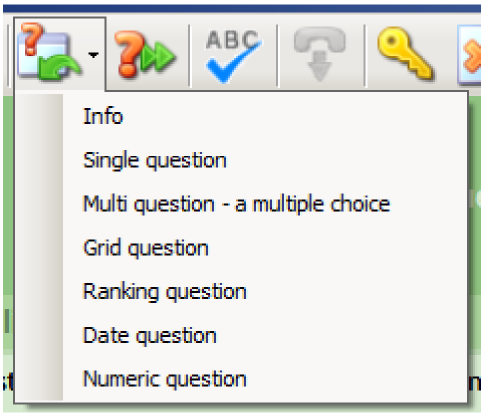


Figure 194 The Redo button drop-out menu

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.

5.7.9 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.

5.7.10 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.

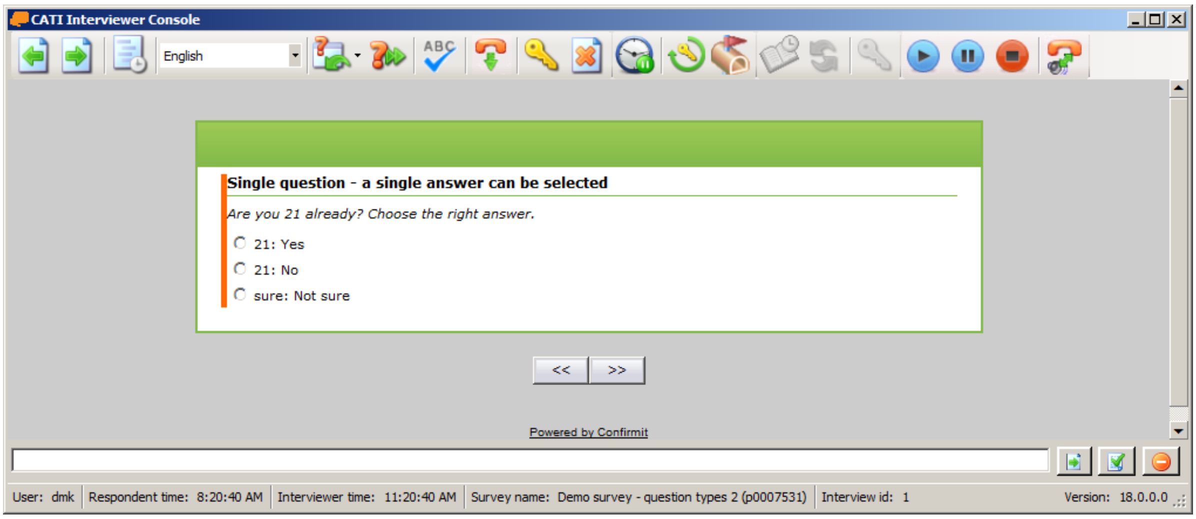


Figure 195 CATI Interviewer Console displaying an extra button set which allows controlling the audio file playback

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.

5.7.11 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.

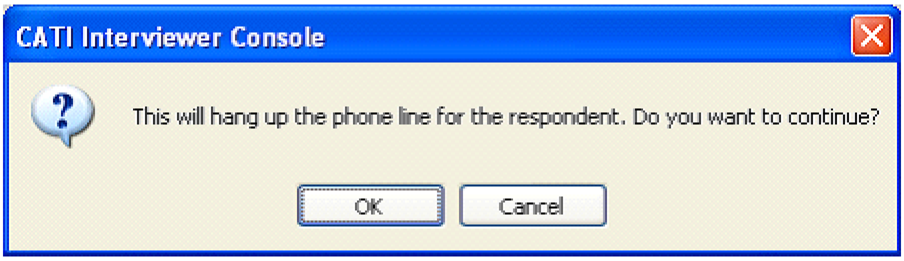


Figure 196 Confirming the respondent line hang up

Choose OK to hang up the respondent line, or choose Cancel to continue the talk.

2. Choose any applicable action after that.

5.7.12 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.

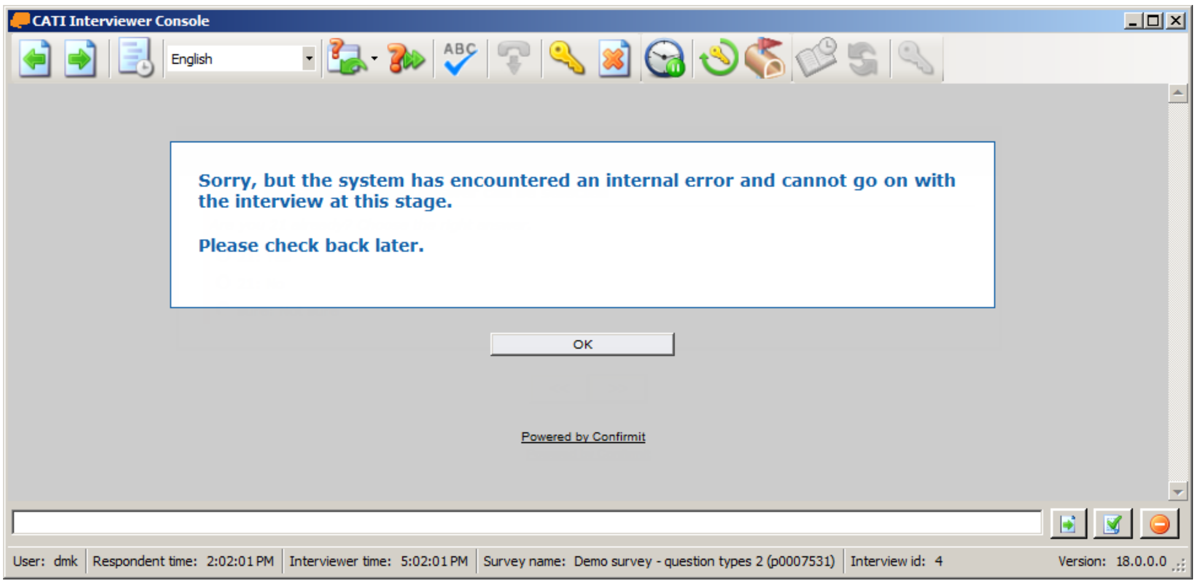


Figure 197 Error message displayed in CATI Console when a survey finishes with an error status.

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.

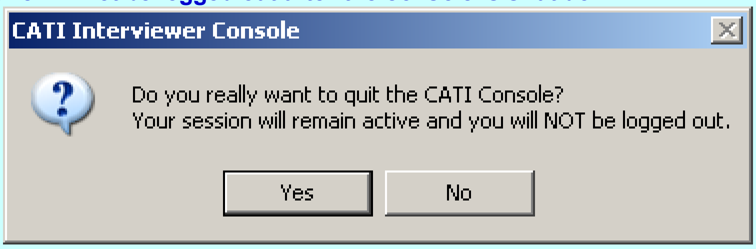
5.7.13 Terminating an interview

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.

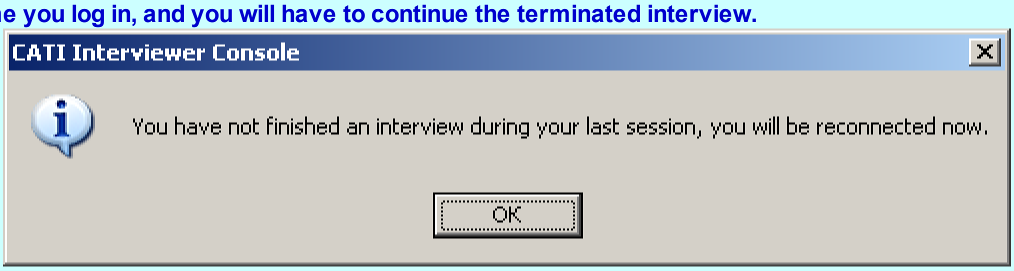
A normal procedure of terminating an interview is described in the instruction below.

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.

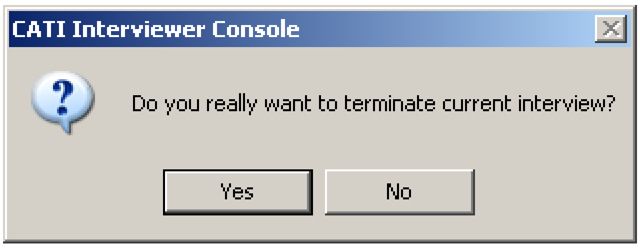


Figure 198 Warning message displayed upon intentional interview termination

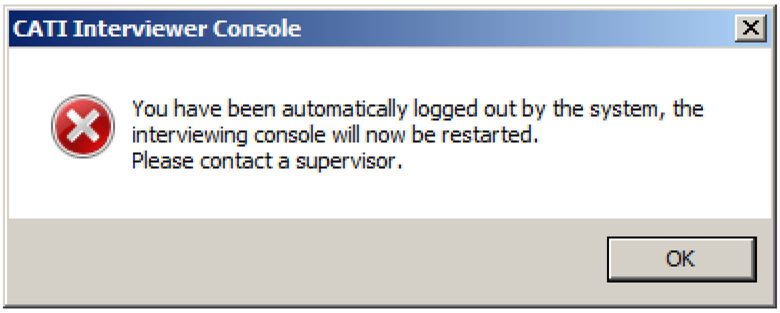
3. Press NO to close this dialog box and continue working with the interview. Press YES to terminate the current interview.
4. When the current interview is terminated, CATI Console starts the next assigned interview.

If there are no interviews left, CATI Console acts the same as it does when an interview is finished (see The finished interview on page 186 for details).

5.7.14 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.

5.8 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 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 CATI Console not to start the next interview, and to log him out after the current interview is finished. The finished interview on page 186 topic explains when an interview is considered finished, and how the CATI Interviewer Console acts in this case.

In any case, after the interviewer logs out of 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 you 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 166, Survey Selection mode on page 167, and Manual Selection mode on page 168 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 187 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.

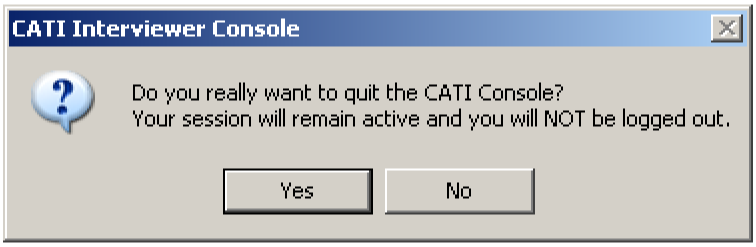


Figure 199 Warning message displayed when the interviewer shuts the CATI Console window

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 165 for details.

6 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.

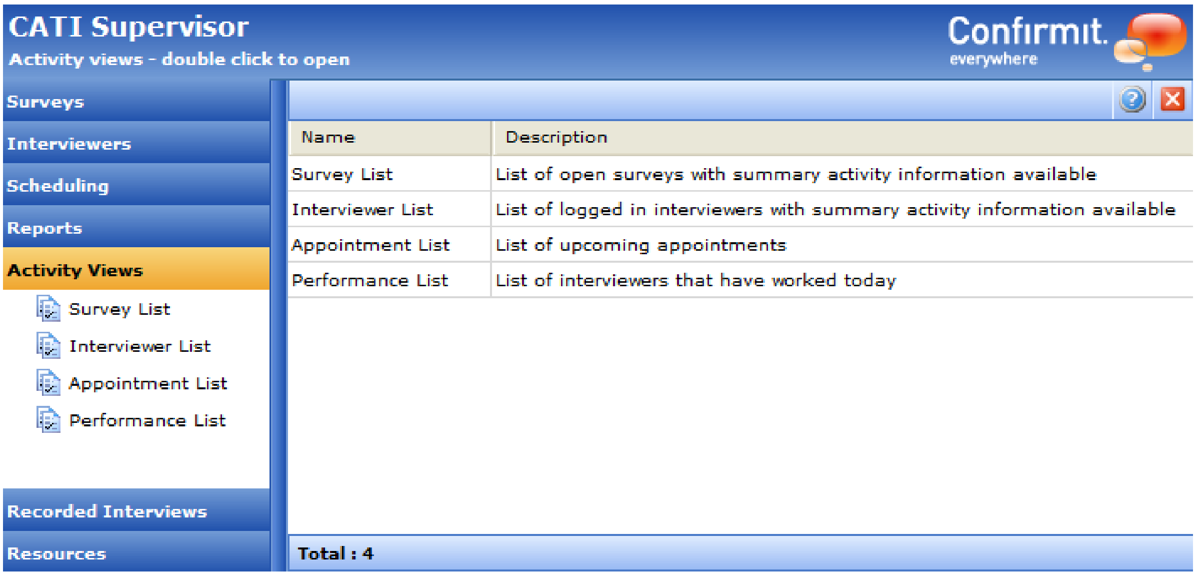


Figure 200 Activity Views object type list

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 206, and Monitoring appointments on page 224 for descriptions of the procedures you can perform working with these windows.

6.1 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. Please refer to Selecting surveys to display in the grid in the Survey List window on page 201 for description of the "Active Surveys" option.

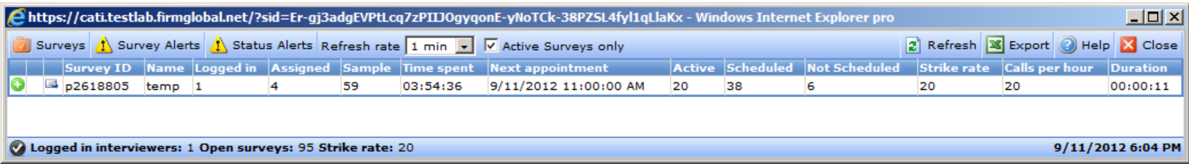


Figure 201 Activity Views - Survey List dialog window displaying the active surveys only

When the supervisor disables the "Active Surveys" option, the Survey List activity view displays all the surveys that are currently opened (refer to Selecting surveys to display in the grid in the Survey List window on page 201 for information on how to choose surveys to show in the Survey List activity view).

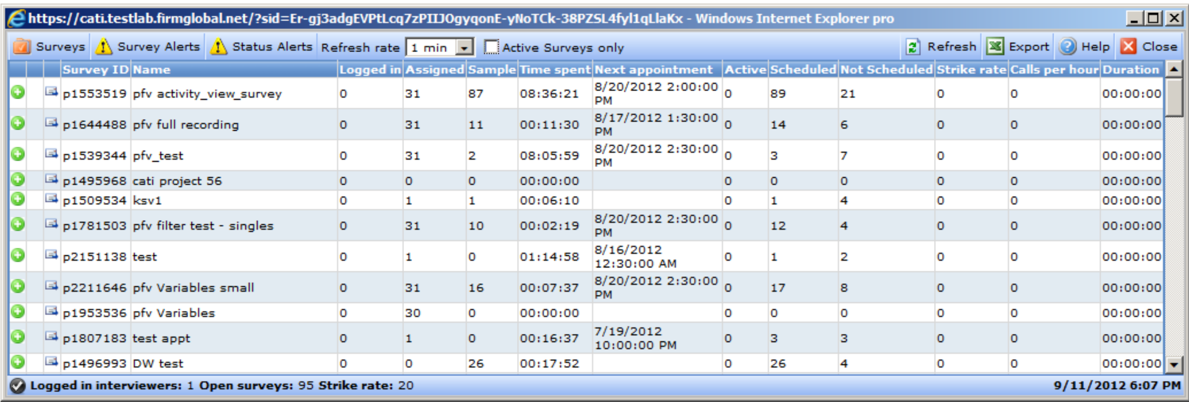


Figure 202 Activity Views - Survey List dialog window

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
- Active - The amount of active calls
- 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 204 for details). The alert indicator displays alerts pertaining to different survey parameters (see Setting up survey alerts on the facing page and Setting up extended status alerts on page 205for details). The Send Message button allows creating and sending messages to interviewers (see Sending messages to interviewers on page 217 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
Surveys	SELECT SURVEYS	Displays the survey selection form. Allows selecting surveys to display in the list in the grid.
Survey Alerts	SET SURVEY ALERTS	Displays the survey alert form. Allows specifying alert thresholds for a survey parameter.
Status Alerts	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	EXPORT	Allows exporting currently displayed survey list.
Refresh	REFRESH	Allows updating the survey list manually.
Close	CLOSE WINDOW	Closes the Survey List dialog window.

6.1.1 Selecting surveys to display in the grid in the Survey List window

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 199 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).

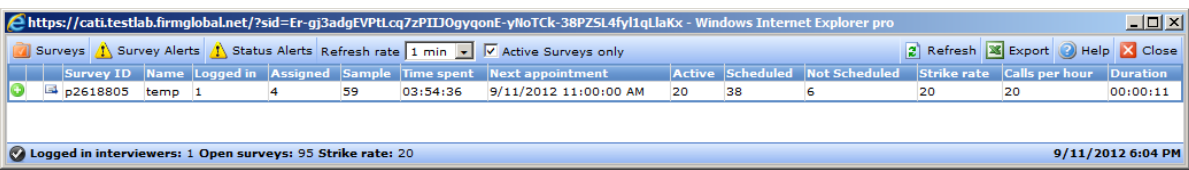


Figure 203 The default Survey List activity view

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 Survey Search form below the button.

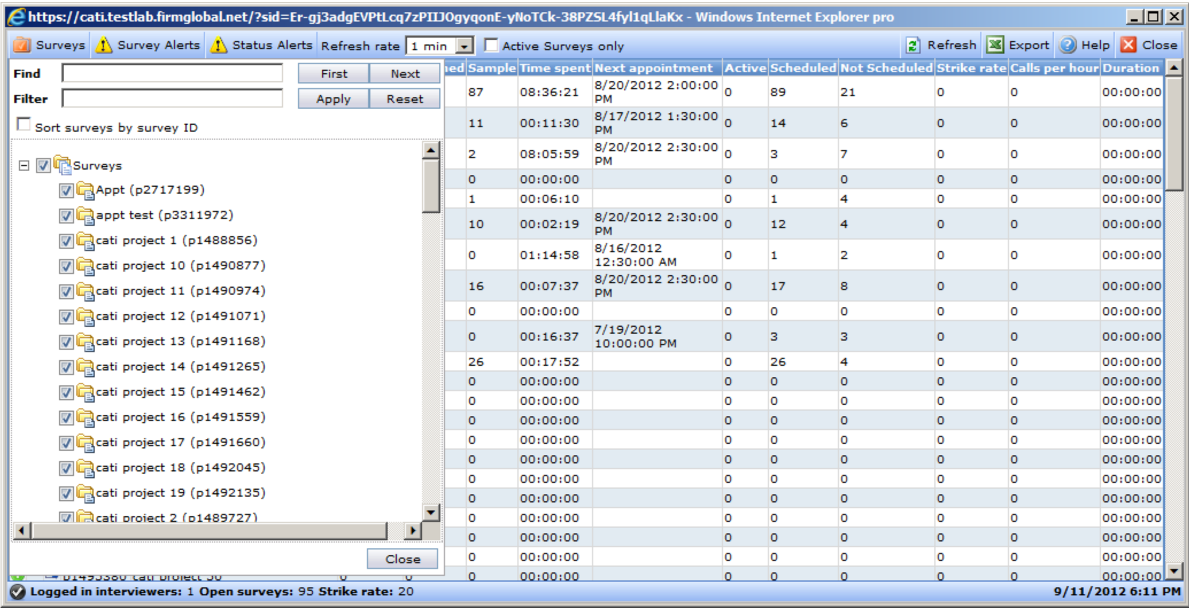


Figure 204 The Survey search form - selecting surveys to display in the Survey List

The form contains the Find and Filter fields, the Sort surveys by project ID checkbox, and the list of currently opened surveys in the form of a hieraractical tree, where each survey is accompanied by a checkbox that allows selecting that survey.

By default all boxes are checked and all surveys are selected.

4. Use the Find field to enter all or part of the survey name and press the First button to skip to the first matching survey. The survey name is highlighted in the hierarchical tree to let you locate it. Pressing the Next button will take you to the next matching survey and so on until the end of the list is reached.

   Check (or uncheck) the survey to show it in the Survey List (or hide it).

5. Alternatively you can apply a filter to select simultaneously all the surveys with the name matching the string entered in the Filter field.

   Enter the name (or part of it) in the Filter field and press the Apply button. All the matching surveys are then checked.

   Filtering results and the Filter field contents can be cleared by pressing the Reset button.

6. Press OK when you are done selecting surveys. This will refresh the survey list in the Survey List dialog window, leaving only the selected surveys and hiding all other surveys.

6.1.2 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 Survey Alerts on the window toolbar.

   This will display the Survey Alert form below the button.

Figure 205 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.

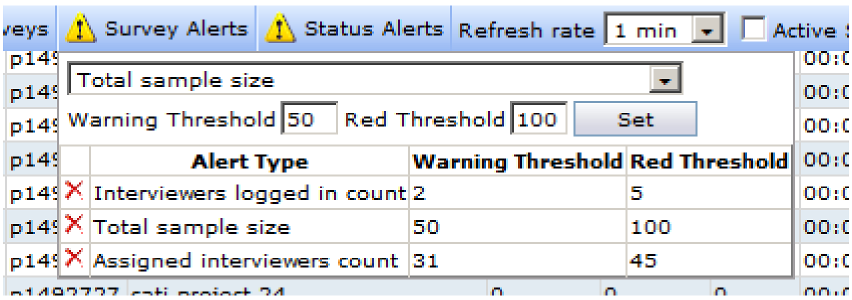


Figure 206 Setting up multiple survey alerts

4. When the grid is refreshed it will display the appropriate alert icons and highlight the corresponding cells (see the picture below).

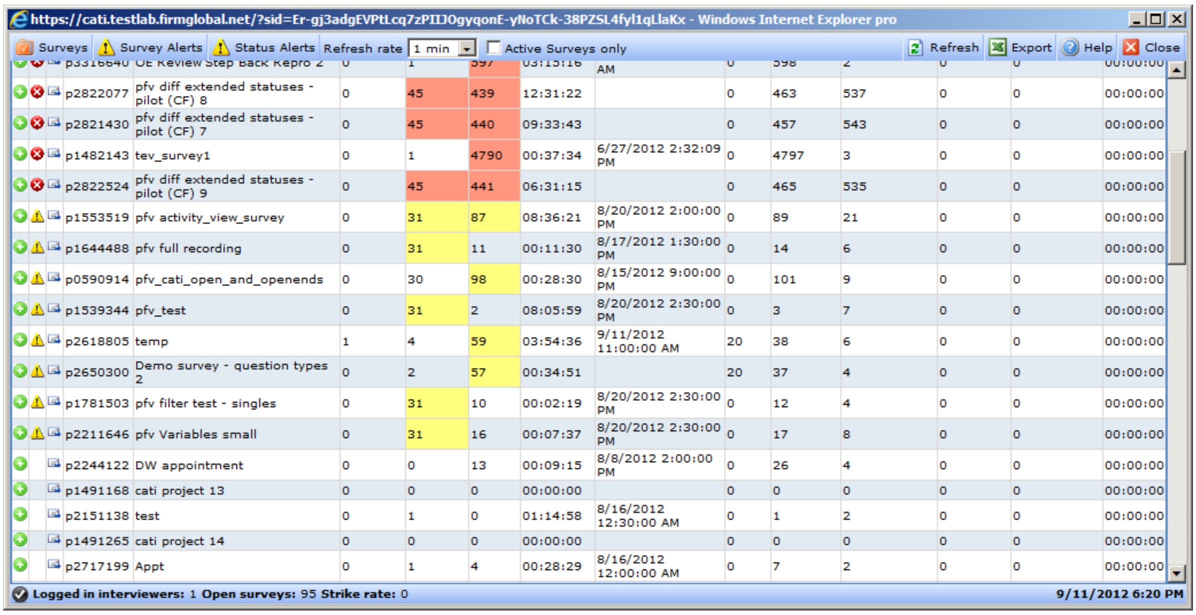


Figure 207 Survey List window displaying the configured alerts

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.

6.1.3 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.

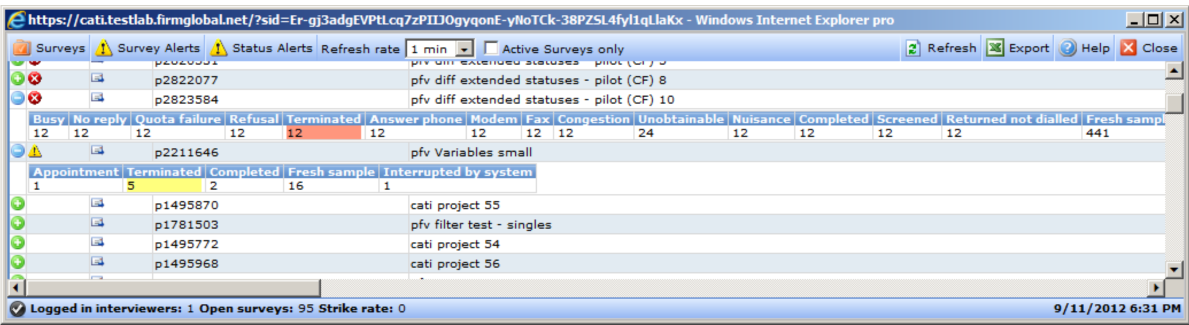


Figure 208 Displaying an extra extended status row in the survey grid

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 202 for instructions on setting up the alerts.

6.1.4 Setting up extended status alerts

Status alerts are specified and monitored almost similar to the survey alerts (see Setting up survey alerts on page 202 for instructions on configuring and monitoring alerts).

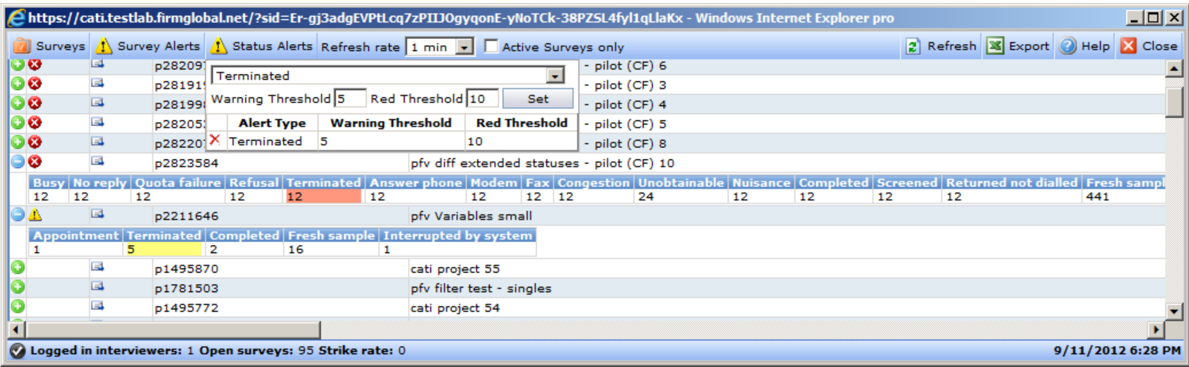


Figure 209 Setting up extended status alerts

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).

6.1.5 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 210 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.

6.1.6 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 200 for details).
2. Set the required survey filter (see Monitoring survey calls and their status on page 204 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.

6.2 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 199). 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 186for 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 211 for details.

When the monitoring Console is not started only specified alerts are displayed in the window grid.

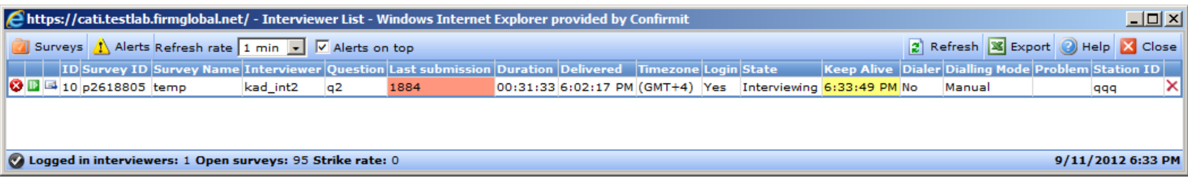


Figure 211 Activity Views - Interviewer List dialog window

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):

- ID - interviewer's ID;
- Project ID - ID of the project to which the current interview pertains;
- Project Name - name of the project to which the current interview pertains;
- Interviewer - interviewer login name;
- Question - name of the currently active question;
- Last submission - time spent to submit the last answer (in seconds);
- Duration - duration of the current interview, or of the break period (in HH-MM-SS format);
- Delivered - timestamp indicating when the current interview was delivered to the interviewer, or when the break has started (format determined by the system locale);
- Timezone - interviewer time zone;

- Login - current interviewer's status ("Yes" indicates the interviewer is logged in and working, "On break" indicates the interviewer is logged in, but has left the desk and will be back shortly);
- State - the state which CATI Interviewer Console currently is in (the interviewer may be selecting a survey/respondent, conducting an interview, waiting for a call to be assigned, etc);
- Keep Alive - timestamp of the last successful server-to-interviewer-station query, indicates that the current interviewer session is considered as still continuing (when time interval between the last successful keep-alive query and the last unsuccessful query exceeds the limit, the interviewer is automatically logged out);
- Dialer - indicates whether the dialer is used by this interviewer, or not;
- Dialing mode - the dialing mode which the interviewer currently works in;
- Problem - displays a corresponding error message in case a telephony problem occurs;
- 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 210 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 221 for the procedure description.

The alert indicator displays alerts pertaining to different interviewing parameters (see Setting up interviewer alerts on page 210 for details).

Monitoring Console Start/Stop button starts or stops (depending on the situation) interviewer work monitoring (see Monitoring interviewers’ work in the real time on page 215 for details).

The Terminate button allows for instant termination of the current interview conducted by the selected interviewer (see Monitoring interviewers’ work in the real time on page 215 for details).

The Send Message button allows creating and sending messages to interviewers (see Sending messages to interviewers on page 217 for details).

The Interviewer List dialog window also contains a toolbar with the following buttons.

Button	Function	Description
Surveys	SELECT SURVEYS	Displays the survey selection form. Allows selecting surveys for which the list of interviewers is displayed in the grid.
Alerts	SET INTERVIEWER ALERTS	Displays the interviewer alert form. Allows specifying alert threshold for one parameter.
Drop-down list	REFRESH RATE	Allows specifying how often the survey list should be updated to reflect the most recent parameter values
Check box	ALERTS ON TOP	When enabled sorts interviewers by triggered alerts (in the order of alert importance - red alerts appear on top).
Refresh	REFRESH	Allows updating the survey list manually.
Export	EXPORT	Allows exporting currently displayed list of interviewer activities.
Close	CLOSE WINDOW	Closes the Survey List dialog window.

6.2.1 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.

To select surveys for displaying in the interviewer list:

1. Press the Surveys button  on the toolbar.

   This will display the Survey Search form below the button.

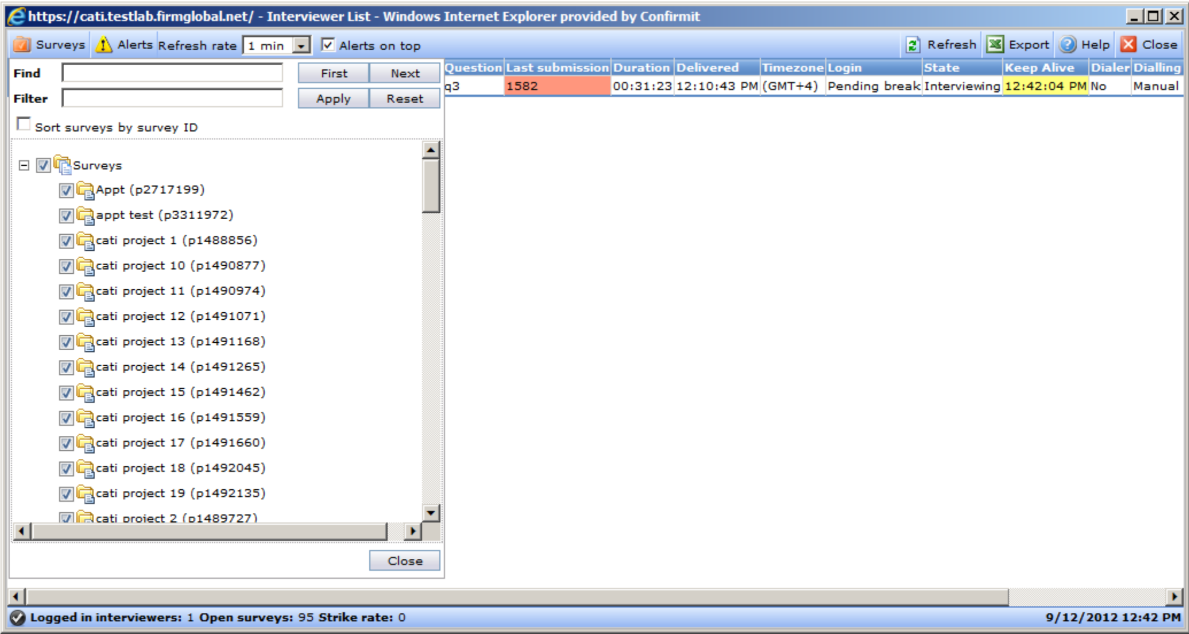


Figure 212 The Survey search form - selecting surveys for the Interviewer List

   The form contains the Find and Filter fields, the Sort surveys by project ID checkbox, and the complete survey list in the form of a hierarchical tree, where each survey is accompanied by a checkbox that allows selecting that survey.

   By default all boxes are checked and all surveys are selected.

2. Use the Find field to enter all or part of the survey name and press the First button to skip to the first matching survey. The survey name is highlighted in the hierarchical tree to let you locate it. Pressing the Next button will take you to the next matching survey and so on until the end of the list is reached.

   You can check all or part of the surveys you have found.

3. Alternatively you can apply a filter to select simultaneously all the surveys with the name matching the string entered in the Filter field.

   Enter the name (or part of it) in the Filter field and press the Apply button. All the matching surveys are then checked.

   Filtered results and the Filter field contents can be cleared by pressing the Reset button.

4. Press OK 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.

6.2.2 Monitoring interviewer performance

You may view the list of interviews performed by the interviewers today. This type of activity view is available with the use of the corresponding command in the Navigation menu in the left frame. The Interviewer performance activity view is presented as a grid in a dedicated 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). This time does not include the break time (see Interviewer on a break on page 186);
- 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 - the number of interviews completed by the interviewer during the past hour (see explanation regarding the counter refresh time and the "past hour" below).

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 199), and choose Interviewer 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 window.

Figure 213 Viewing the Interviewer Performance list

2. The Interviewer Performance view by default lists all interviewers that have worked today in the Interviewer Console and performed at least one interview.

   You can exclude from this view all the interviewers who are currently logged out leaving only those who are currently logged in. To do this check the Logged in interviewers only box. This setting is applied instantly - the grid is refreshed, and all interviewers who are currently not logged in are hidden.

3. You can refresh the view manually at any time by pressing the Refresh button  above the grid.

4. You can export the Interviewer Performance list in MS Excel format. The exported list includes retains the structure of the grid displayed in the Interviewer Performance window. 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 above the grid and choose the path to save the file.

   The name of the file containing the exported Interviewer Performance list includes the name of the activity view and the timestamp.

1. The status bar in the Interviewer 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 253 for explanation).

6.2.3 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).

In addition, to attract your attention, CATI Console automatically sorts 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 come interviewers with blank indicator cells (all parameters are normal).

To specify alert parameters:

1. Press the Alerts button Alerts on the toolbar.

   This will display the Alert form below the button. The picture below shows the Alert form with already configured values and illustrates possible alert situation.

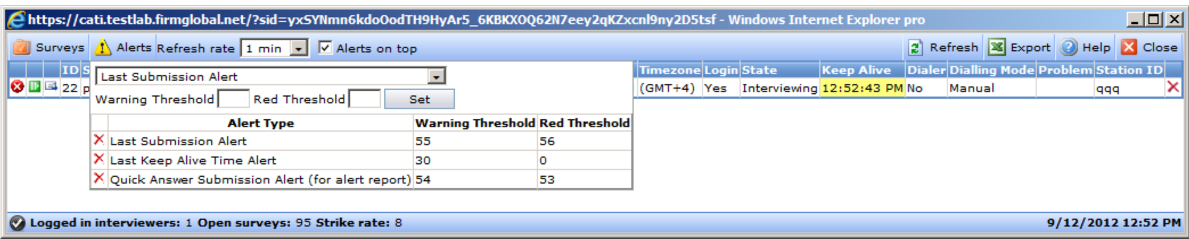


Figure 214 Setting up interviewer alerts. Amber alert is displayed.

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 critical (Red) 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.
6. The bottom form row displays the current Warning (amber) and Red threshold values. An icon to the left - ✕ - deletes these values and removes the alert.

6.2.4 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 206 for details).
2. Set the required survey filter (see Selecting surveys to display in the grid in the Interviewer List window on page 207 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.

6.2.5 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 bypassing, 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.

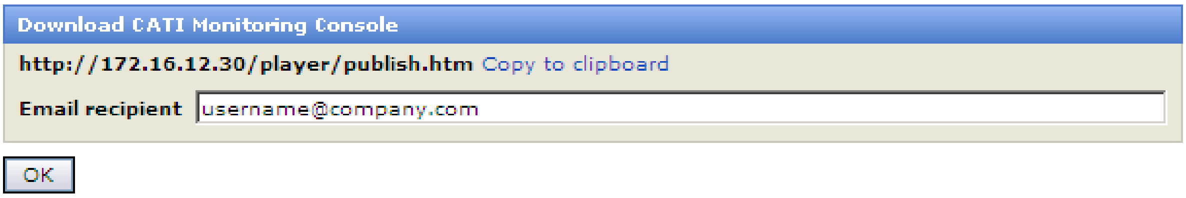


Figure 215 Fetching CATI Monitoring Console download URL

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 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.

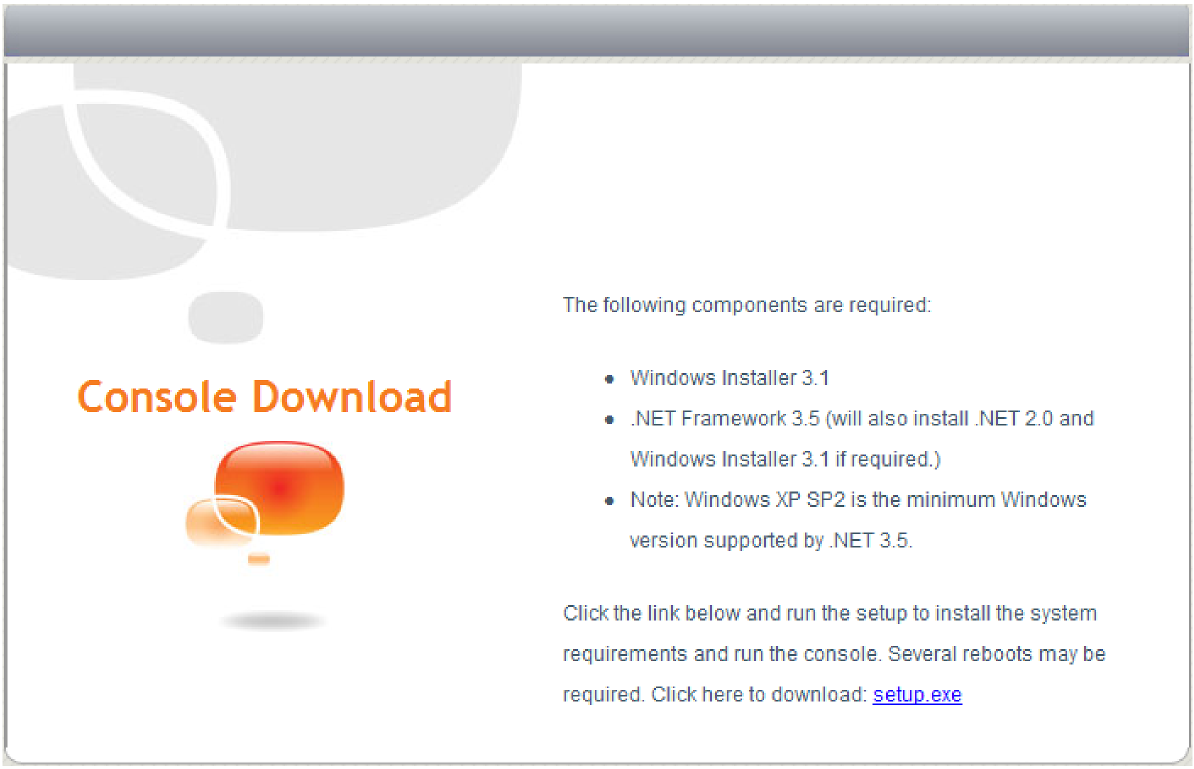


Figure 216 CATI Monitoring Console download page

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 on the next page.

   CATI Monitoring Console upgrade procedure is described in Upgrading CATI Monitoring Console on the next page.

6.2.5.1 *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 211 for details).
2. The dialog window with the progress bar showing the installation progress is displayed.

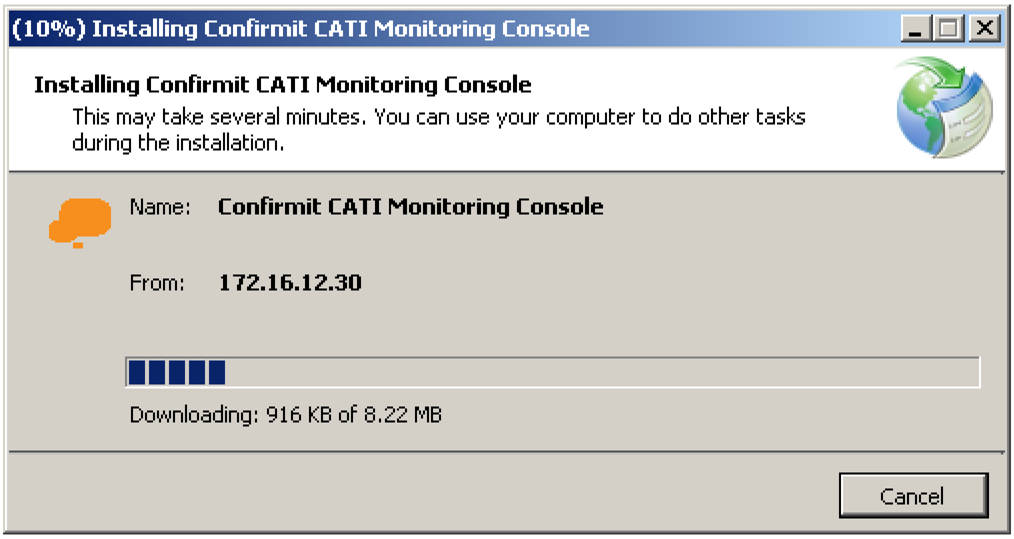


Figure 217 CATI Monitoring Console download progress

The CATI Monitoring Console is installed into the default destination. You cannot change the installation path.

3. You will have to run the CATI Monitoring Console application after it is installed to use its features.

6.2.5.2 *Upgrading CATI Monitoring Console*

CATI Console will be upgraded automatically the first time you log on after the application has been upgraded on the server. The files are copied into your PC and the console is enabled for CATI operations.

How to handle the update announcements:

1. When an update is available for the CATI Monitoring Console application, you will be notified and prompted to download and install it.

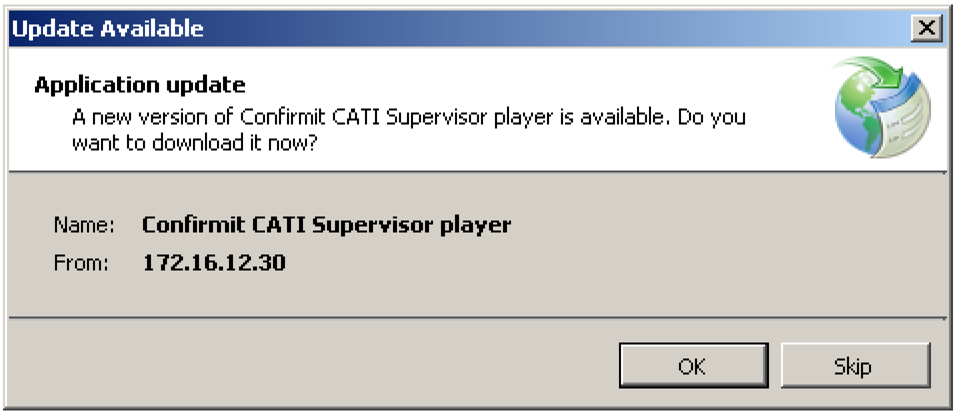


Figure 218 CATI Monitoring Console update announcement

2. The normal procedure will be to approve the download, wait for the few moments it takes to download and install the update, then continue using your system. If you do not wish to download and install the update when prompted, cancel the prompt dialog by pressing the Skip button.
3. Note that if you refuse the update when first notified, you will be prompted again the next time you log in to work with CATI Monitoring Console.

6.2.5.3 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 PC's Start menu > Settings > Control Panel and open the Add or Remove Programs application.
2. Using this, choose to remove the **Confirmit CATI Monitoring Console** application.

   This action will display the Maintenance dialog window.

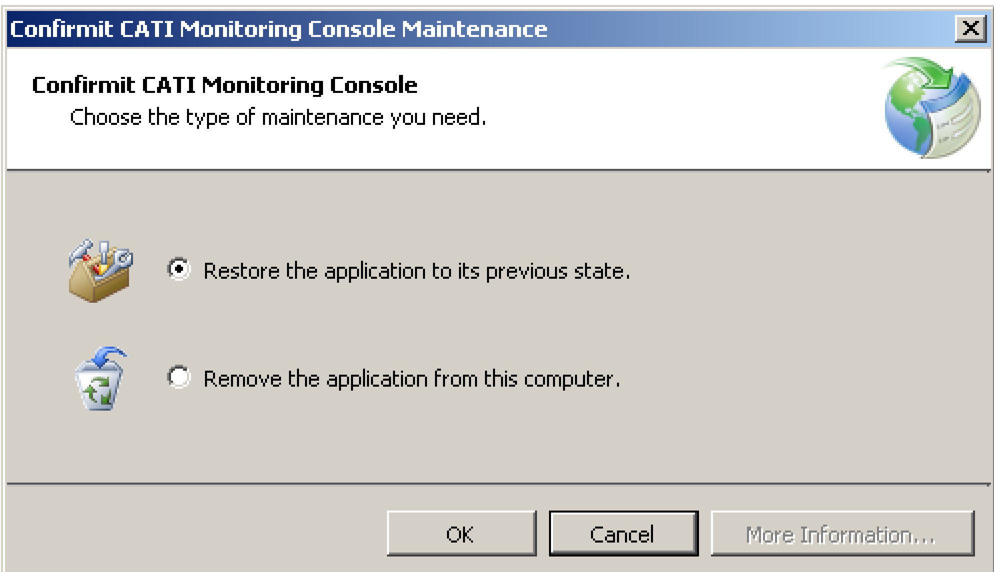


Figure 219 CATI Monitoring Console maintenance dialog

3. Choose the Restore… option to roll back the previous update (if the application has not been updated, this option will be unavailable).
4. Choose the Remove… option to completely uninstall the CATI Monitoring Console application from the computer.
5. Press OK to start the chosen procedure, and follow the provided instructions.

6.2.6 Monitoring interviewers' work in the real time

The CATI Supervisor module allows for live monitoring of the interviewing process.

To monitor interviewers' 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 211 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 222 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.

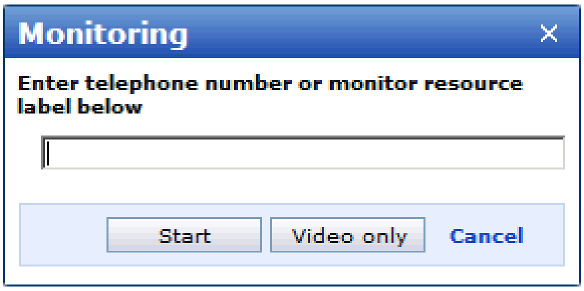


Figure 220 Choosing the monitoring option - with or without listening

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.

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.

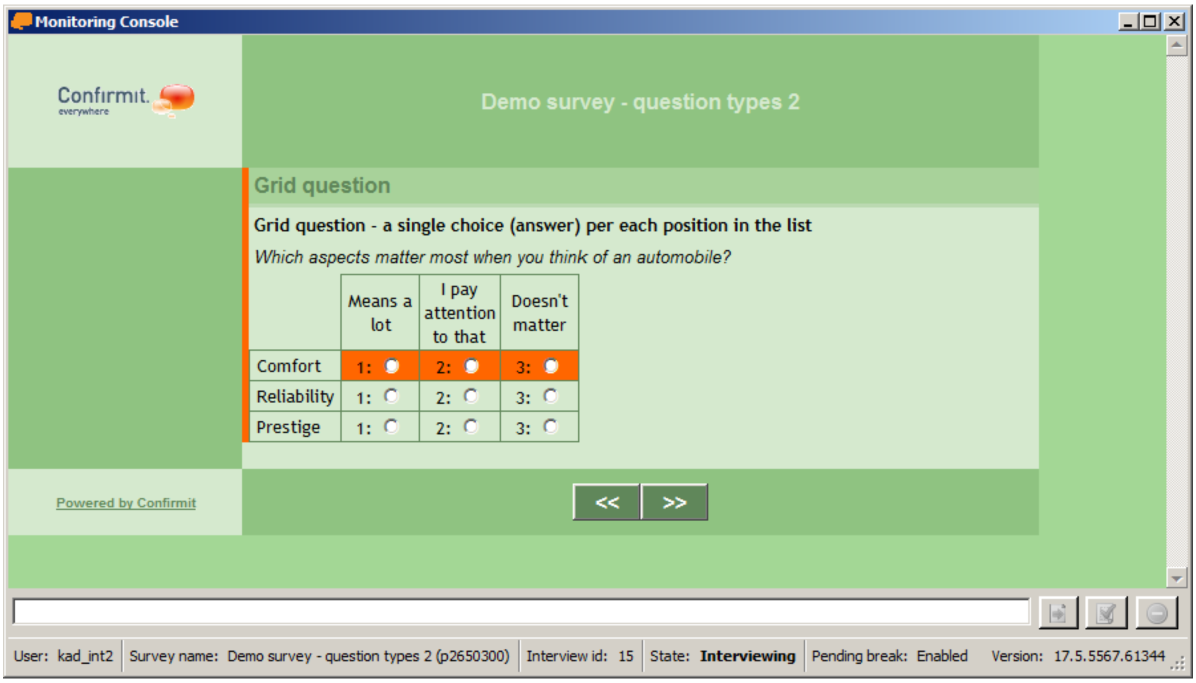


Figure 221 The Monitoring Console window displaying the monitored interview

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 <file-name> 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 193 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.

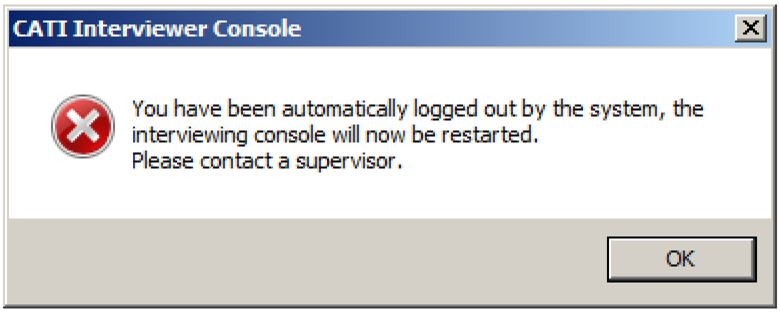


Figure 222 Warning message displayed to the interviewer after the interview has been terminated by the supervisor

   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 197 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.

6.2.7 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 165 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 13 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.

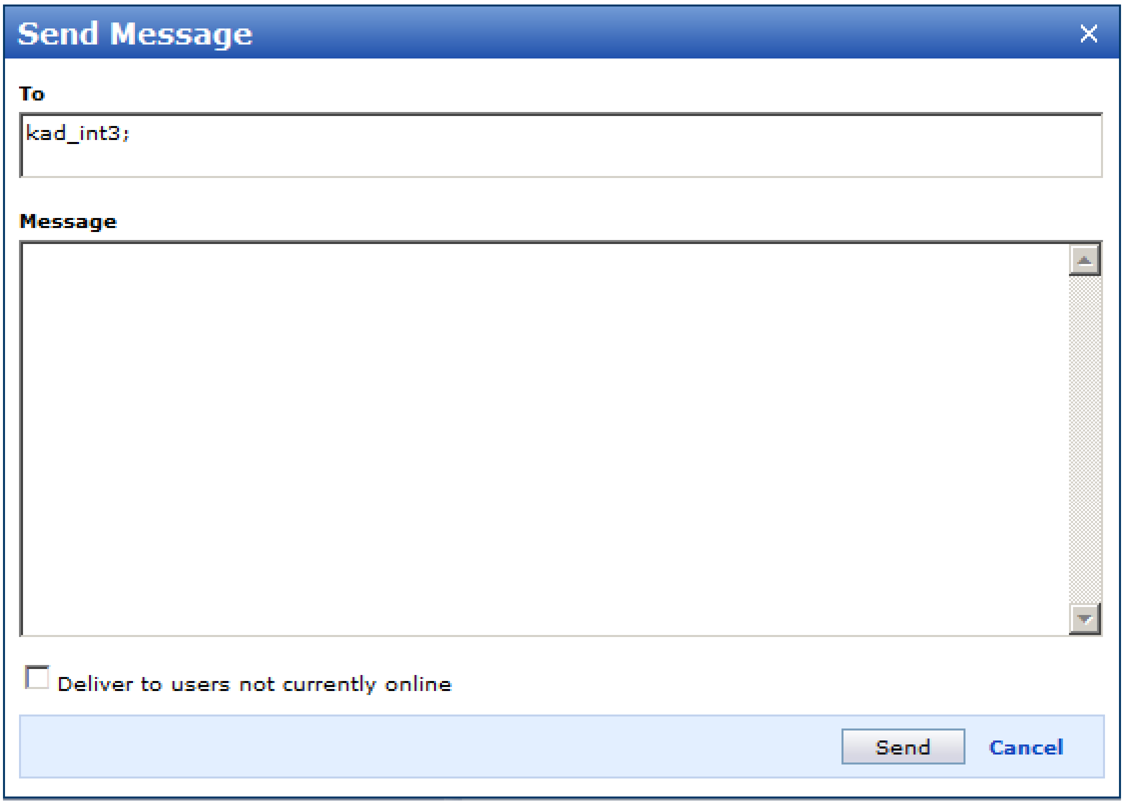


Figure 223 Sending message to interviewers

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.

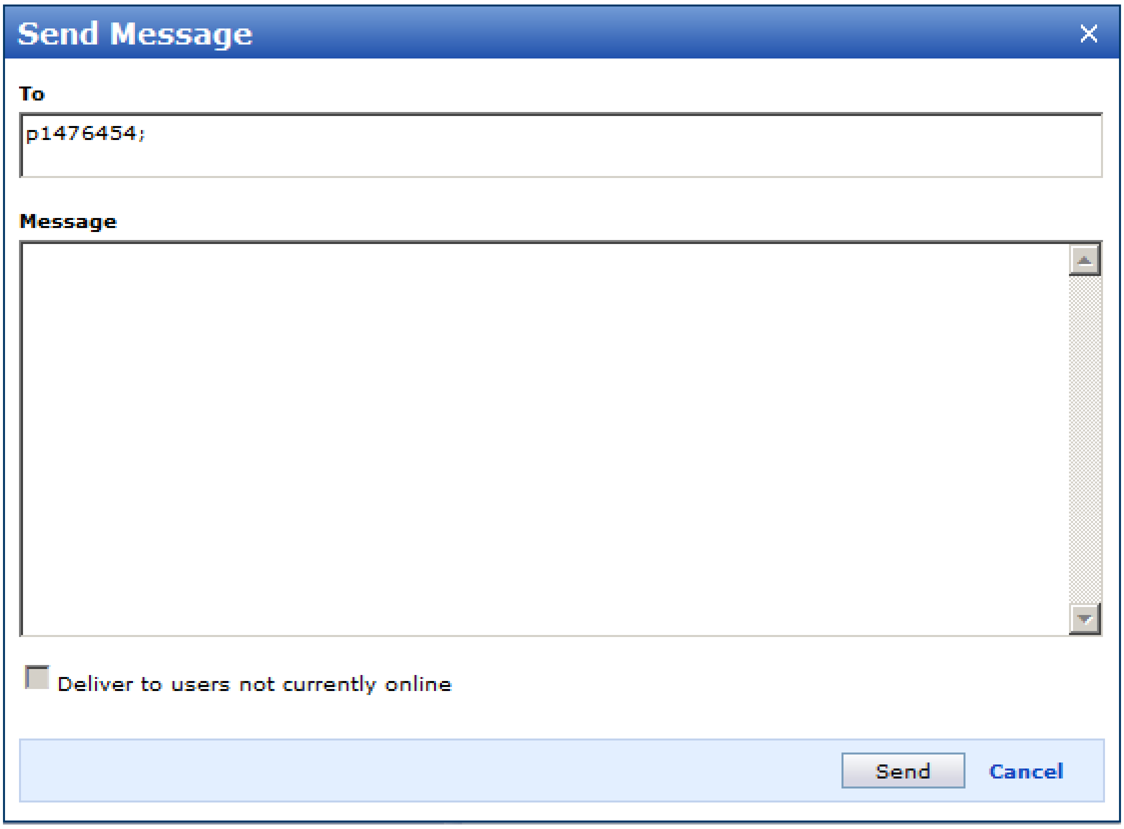


Figure 224 Sending message to interviewers assigned to the selected survey

4. Selected survey names will all be displayed in the To field separated by semicolons.
5. See Send Message dialog window. on page 218 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 206).
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 218 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 200).
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 218 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.

6.2.8 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.

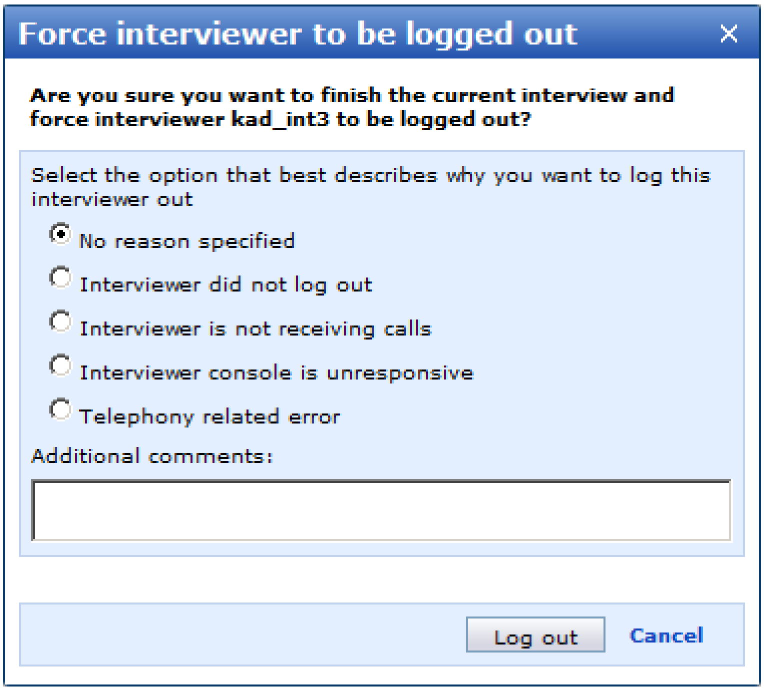


Figure 225 A dialog displayed when the supervisor tries to terminate the interview (force the logout)

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 206 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.

6.2.9 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 interviewers' work in the real time on page 215 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 114 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 Confirmit Authoring module. Please refer to Confirmit Authoring manual for 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 52). The status of both options is displayed on this tab.

Please refer to Enabling and configuring the Dialer on page 244 for instructions on enabling the Dialer and checking its current state.

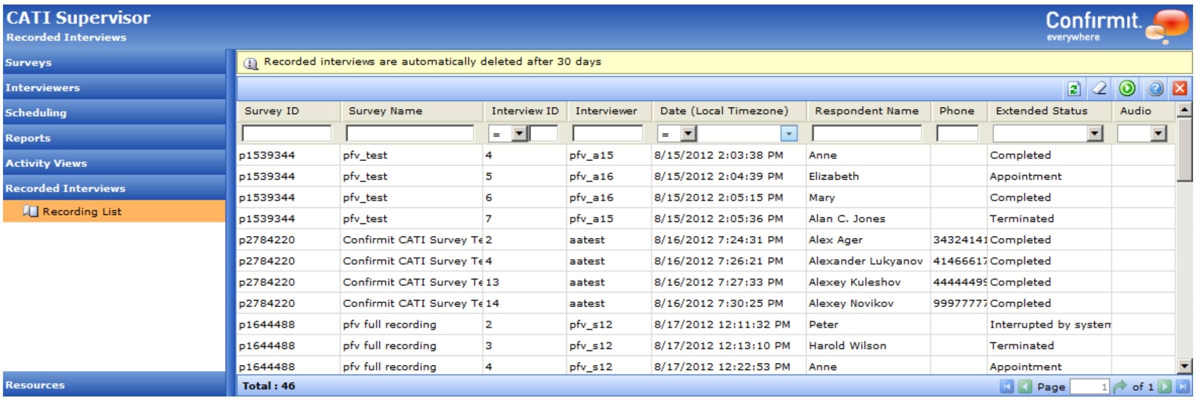
After the **Enable whole interview screen recording** option (in Confirmit Authoring) is enabled, all interviews would be recorded and added to the Recorded Interviews list automatically.

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 which accompany these video files.

Note that the *Enable whole interview screen recording* and *Enable whole interview audio recording* options are managed independently. 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 114 for details).

To play a recorded interview:

1. First check if CATI Monitoring Console is installed on your computer - the appropriate program group should be present in the Start/Programs menu. This module is required to perform all kinds of interview monitoring. Please refer to Downloading the CATI Monitoring Console Installation Files on page 211 for information on how to download and install the CATI Monitoring Console.
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 recording has ended
- Audio - audio recording availability

4. In case you have applied a filtering criteria using the searchable column header (see Searching for objects in the list on page 9), 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 press the Play button in the toolbar above the list.
6. This will initiate download of the file containing the recording of the selected interview. The standard MS Windows file download dialog box will appear, asking you to choose whether you want the file to be opened from its location, or to be downloaded on your computer. It is up to you to decide on how to act, still we recommend running the file from its location on the server - this will speed up the process.

   If you decide to download 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 procedure will be the same as described in the next step.
7. After the file is opened either from the server, or from your local computer, the CATI Supervisor Player starts.

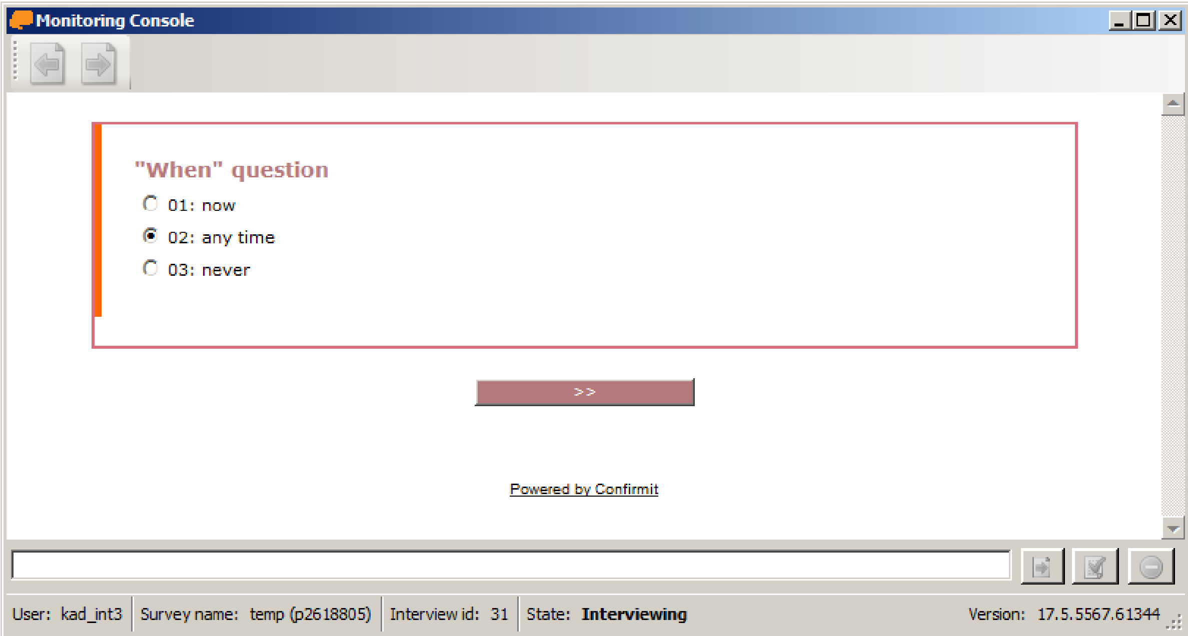


Figure 226 Recorded interview displayed in the CATI Supervisor Player

Recorded interview is displayed in the CATI Supervisor Player window starting from the very first interview page that the interviewer got 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.

If there is an audio track present, it is played in sync with the video. Sometimes audio and video tracks may become desynchronized. Then you can adjust the gap between tracks by jumping about 2 seconds back or forth in the audio track. To jump back and forth 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 forth in the audio track.

When the playback finishes, the Supervisor Player window closes.

8. 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.

6.3 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 199). It is then opened in the Appointment List dialog window.

Appointment list shows the amount of appointments for each survey which are due in the specified short and long period.

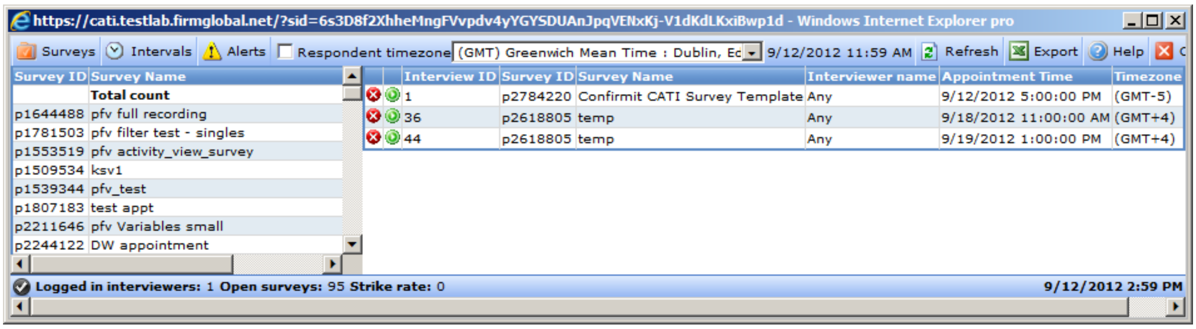


Figure 227 Activity Views - Appointment List dialog window

The Appointment List dialog window provides the Supervisor with the following information (presented in the grid columns):

- Interview ID
- Survey ID
- Survey Name
- Appointment time
- Timezone

The Appointment List dialog window also contains a toolbar with the following buttons.

Button	Description	Function
Surveys	SELECT SURVEYS	Displays the survey selection form. Allows selecting surveys for which the list of appointments is displayed in the grid.
Intervals	SET APPOINTMENT INTERVALS	Displays the monitoring intervals for appointments and allows specifying appointments.
Alerts	SET APPOINTMENT ALERTS	Displays the appointment alert form. Allows specifying alert threshold for one parameter.
Checkbox	RESPONDENT TIMEZONE	Allows specifying that time values for the appointments should be shown for the corresponding respondent timezone.
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	REFRESH	Allows updating the appointment list manually.
Export	EXPORT	Exports current appointment list in MS Excel format.
Close	CLOSE WINDOW	Closes the Appointment List dialog window.

6.3.1 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 Surveys on the toolbar.

   This will display the Survey Search form below the button.

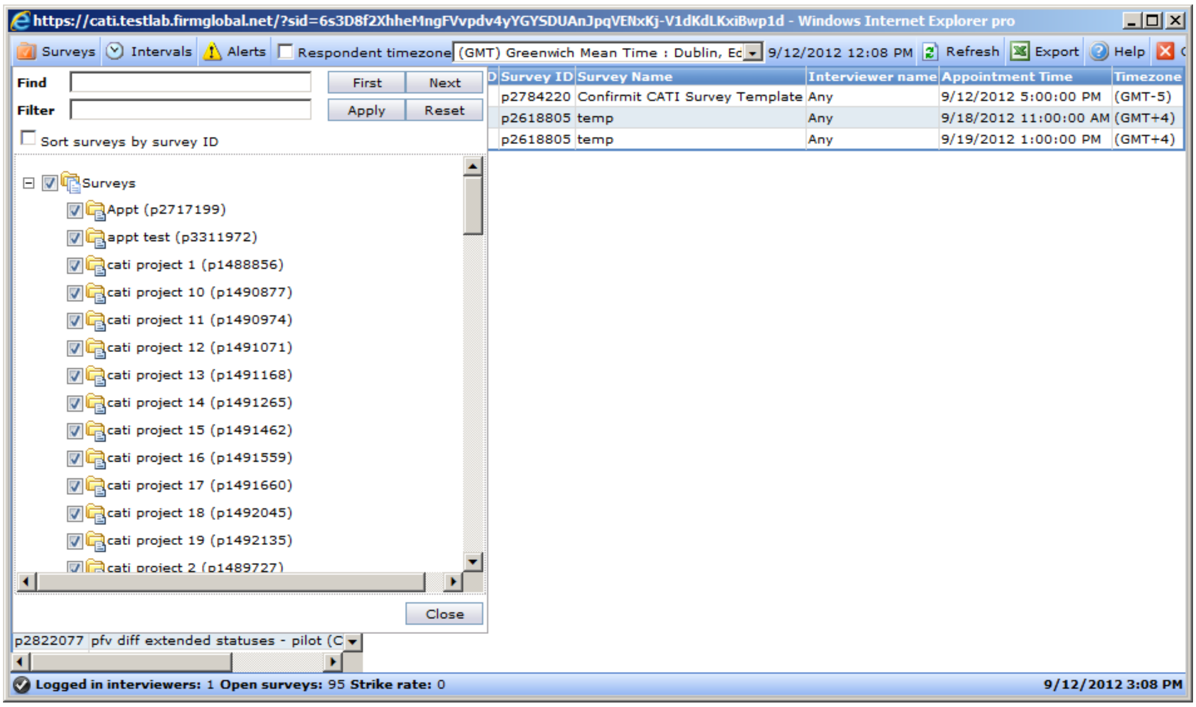


Figure 228 The Survey search form - selecting surveys for the Appointment List

The form contains the Find and Filter fields, the Sort surveys by project ID checkbox, and the complete survey list in the form of a hierarchical tree, where each survey is accompanied by a checkbox that allows selecting that survey.

By default all boxes are checked and all surveys are selected.

2. Use the Find field to enter all or part of the survey name and press the First button to skip to the first matching survey. The survey name is highlighted in the hierarchical tree to let you locate it. Pressing the Next button will take you to the next matching survey and so on until the end of the list is reached.

   You can check all or part of the surveys you have found.

3. Alternatively you can apply a filter to select simultaneously all the surveys with the name matching the string entered in the Filter field.

   Enter the name (or part of it) in the Filter field and press the Apply button. All the matching surveys are then checked.

   Filtering results and the Filter field contents can be cleared by pressing the Reset button.

4. By default all surveys are sorted alphabetically by the title. To facilitate visual search you can turn on sorting by project ID instead - check the Sort surveys by project ID box to do this.

5. Press OK 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.

6.3.2 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.

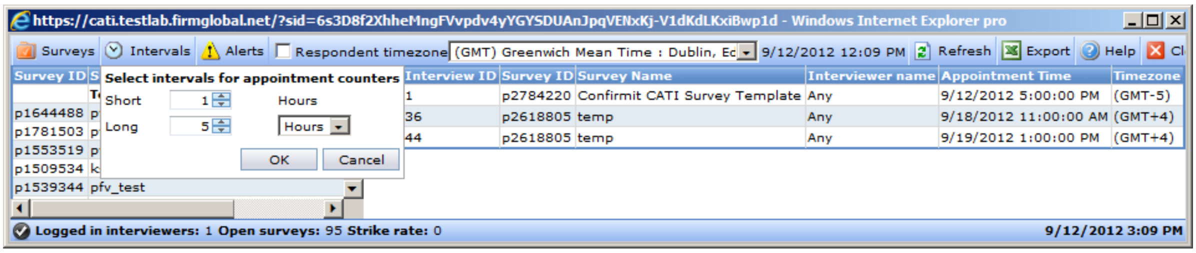


Figure 229 Setting up intervals for appointment counters

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 fall within specified periods.

6.3.3 Setting up alerts for monitoring appointments

Alert is set up in order to warn supervisor of appointments that are due in a very short time period. Also the alert can warn in case some of the appointments are overdue. This is a single alert that is used to monitor all the appointments.

Sometimes the situation may require switching the interviewer to another job, which makes impossible conducting the appointed interview at the specified time. Supervisor can handle such situation by modifying parameters of the appointed interview. He can change the interview start time, its priority, or even reassign this interview to another person/group. In the CATI Supervisor module parameters of the appointed interview can be changed with the help of the Activate dialog window (see Activating an interview on page 106). The Appointment List dialog window provides instant access to the Activate dialog window in such situation – see Activating the alerted interview on the facing page for details.

To set up the appointment alerts:

1. Press the Alerts button 

on the toolbar.

   This will display the Time form right below this button.

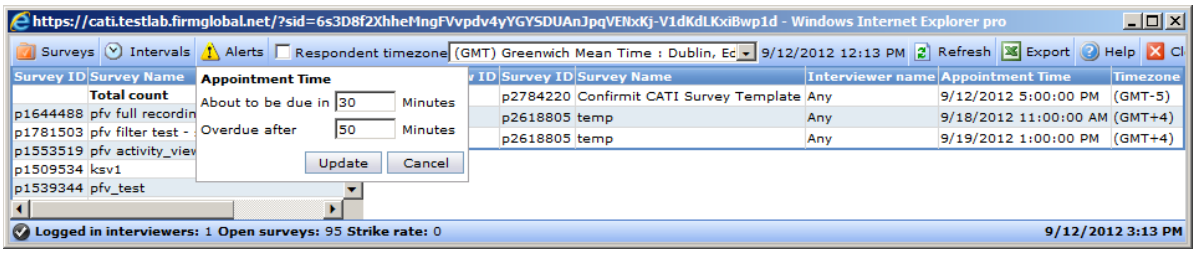


Figure 230 Setting up appointment alerts

2. Enter the 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 for this number of minutes.
4. Press the Set 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 regular survey alert grid. 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).

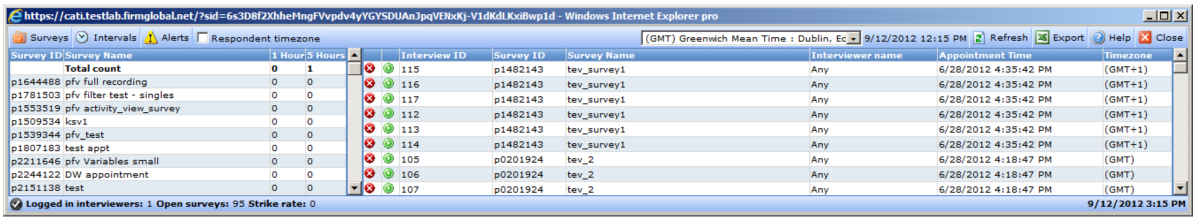


Figure 231 Monitoring the appointment alerts

The leftmost column of this grid displays the alert indicator – the yellow triangle in case the appointment is still due and the red crossed circle in case the appointment is already overdue.

6. 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).

[Comments concerning this topic? Send an email]()

6.3.3.1 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. This procedure is the same Activate procedure as described in Activating an interview on page 106.

Such 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 on page 106 for detailed instructions on activating the interview.

6.3.4 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 224 for details).
2. Set the required survey filter (see Selecting appointments to display in the grid in the Appointment List window on page 225 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.

6.4 Viewing the interviewer performance list

The supervisor can view the summary regarding performance of all interviewers that have worked today.

To view the interviewer performance list supervisor has to choose the Appointment List from the Activity Views object in the Navigation frame (see Monitoring in the CATI Supervisor on page 199). It is then opened in the Interviewer Performance List dialog window.

The list displays the following data for each interviewer:

- Interviewer name
- Interviewing time - total time spent on interviewing today
- Interviews - total amount of interviews started today
- Completes - the number of interviews completed today
- Strike rate - the number of completed interviews per past hour

Supervisor can perform no actions in the Interviewer Performance List dialog window except for exporting the contents of this activity view (see Exporting the interviewer performance list on page 229 for details).

6.4.1 Exporting the interviewer performance list

You can export the interviewer performance list as an MS Excel sheet.

To export the interviewer performance list:

1. Display the Interviewer Performance List window (see Viewing the interviewer performance list on page 228 for details).
2. 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 interviewer performance list is then saved to a file in MS Excel format.

   If you press the Open button, theinterviewer performance list is opened in the application which is used by your system by default to view files in MS Excel format.

7 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 inter-view/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 situ-ations 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** - options which are used for locking of the interviewer account and configuring a set of reports that can be emailed to the interviewers on a daily basis (available for users with administrative per-missions only - refer to Confirmit Authoring User Guide for details);
- **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.

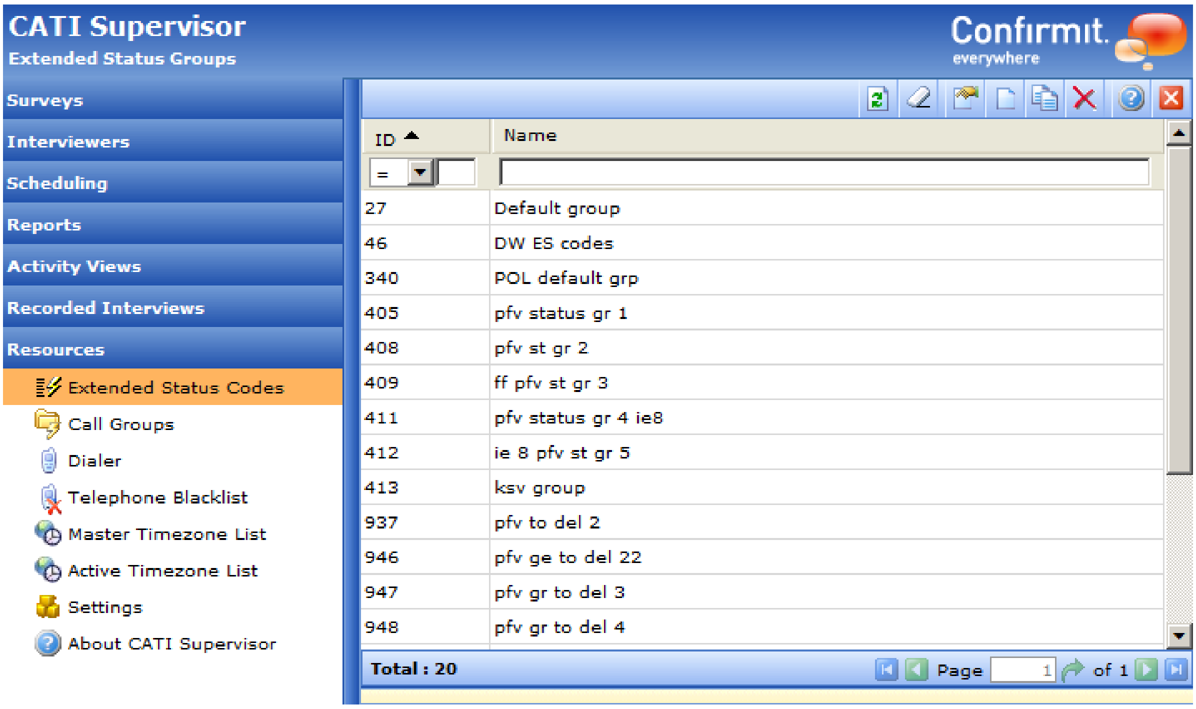


Figure 232 The Resources object type list (Extended Status Codes object list is displayed)

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.

7.1 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 97 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 302 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 set into a group of Extended Status Codes. Furthermore, custom extended status codes can be configured individually for each group.

A certain Extended Status Code Group must be selected as a survey property - see Viewing and modifying general properties of a survey on page 52.

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.

7.1.1 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.

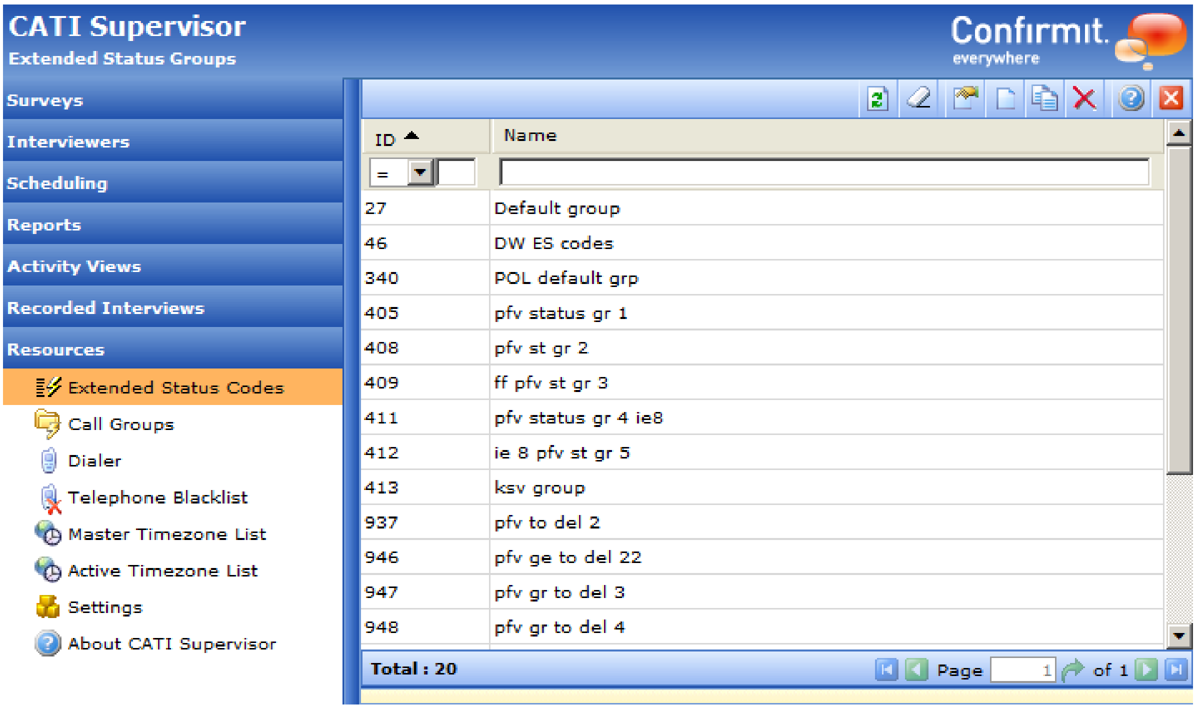


Figure 233 Viewing the Extended Status Code group list in the top right frame

2. The user can perform the following operations with the Extended Status Code groups:
   - View and modify the Extended Status Code group properties;
   - 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
	CLOSE WINDOW	Closes the CATI Supervisor dialog window

7.1.2 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 toolbar, or right-click any row in the list in the grid and choose New from the shortcut menu. This will display the New state group dialog window.

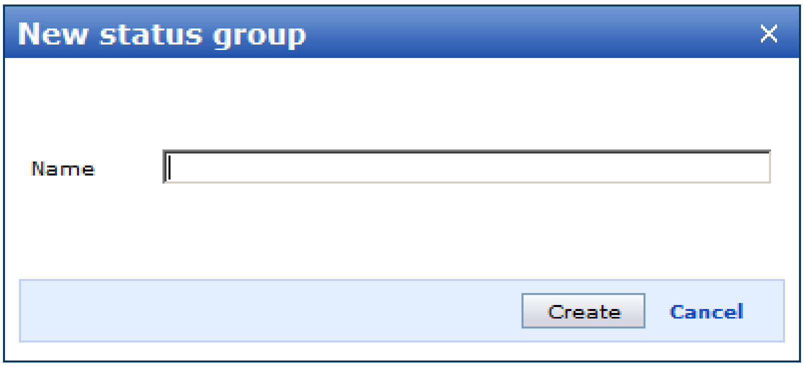


Figure 234 Adding a new extended status group to the list

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 below for details.

7.1.3 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 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 Extended Status Code group in the bottom right frame.

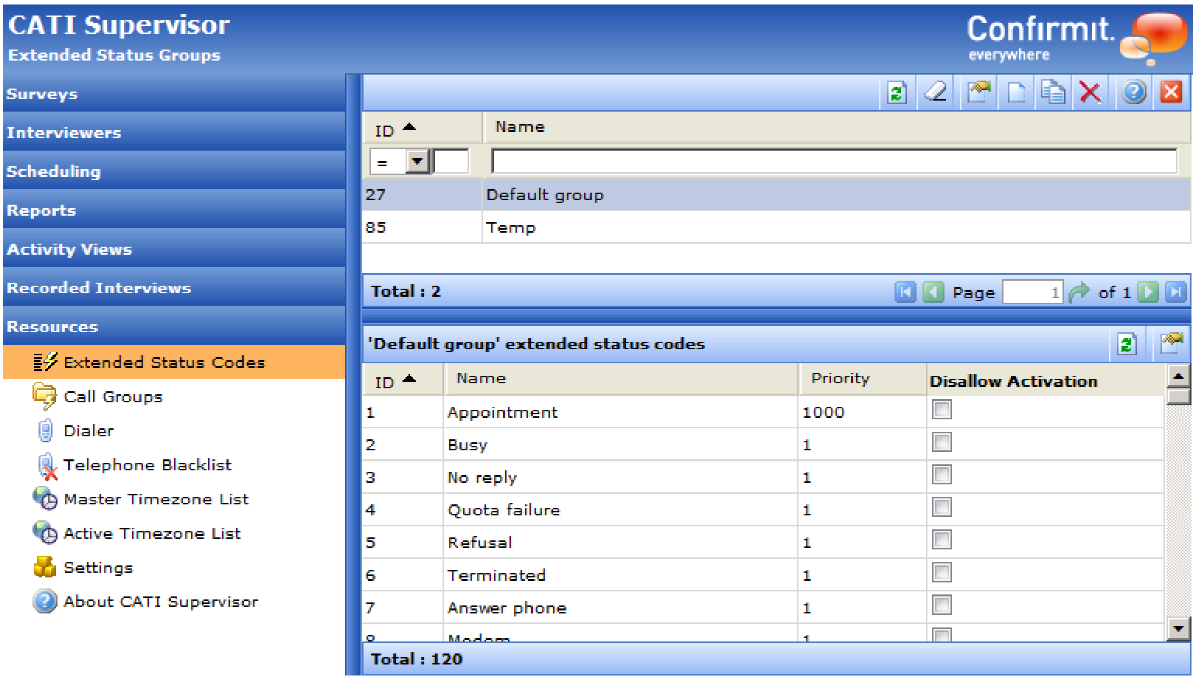


Figure 235 Viewing the extended status list

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 form containing current status properties right below the selected extended status.

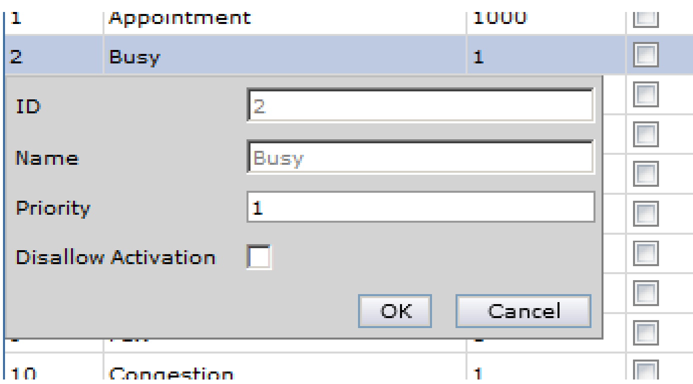


Figure 236 Modifying the extended status properties

Use this form to modify extended status properties.

2. For the first 30 statuses 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 87 section for description of this state).

   Press OK in the status edit form to confirm property changes.

3. Repeat the procedure to modify properties of other extended statuses.

7.1.4 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.

7.2 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 30 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 52 for instructions on how to enable the Call Group mode for a survey.

The interviewer working in the Survey Selection task choice mode will receive calls in the following order.

- First come calls with extended statuses listed in the Call Group assigned to that interviewer - these 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;
- All the rest calls would be delivered only after all calls matching the Call Group condition are delivered;
- Calls assigned to the interviewer group are not delivered in case the interviewer works in the Call Group mode.

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 30 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.

7.2.1 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.

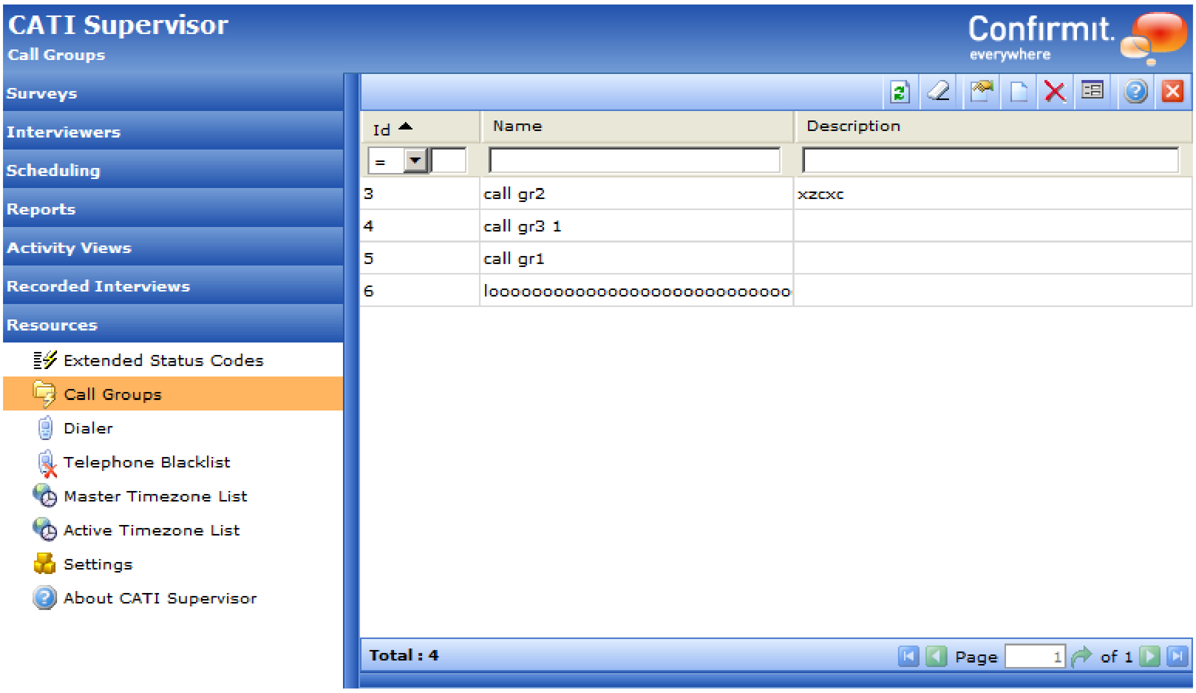


Figure 237 Viewing the Call Group list

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

.

7.2.2 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 dialog window.

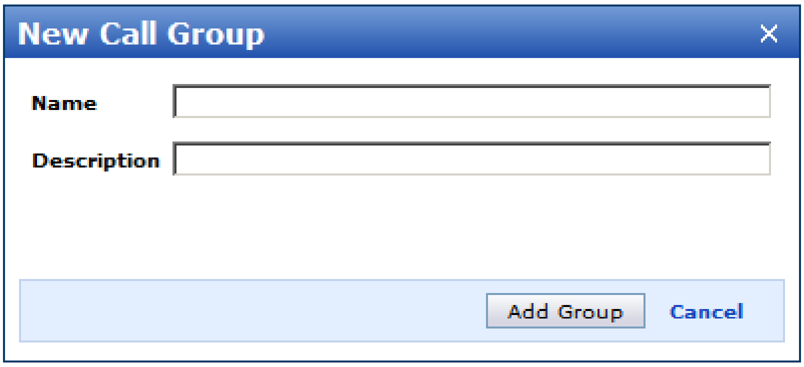


Figure 238 Adding a new call group to the list

2. Enter the name for the new group in the Name field and optionally a description of this group in the Description field and press Add Group.
3. The list in the top right frame refreshes, and the new call group appears in that list.
4. Each new call group is created empty, you should define extended statuses and configure other group properties – please refer to for instructions.

7.2.3 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 dialog window.

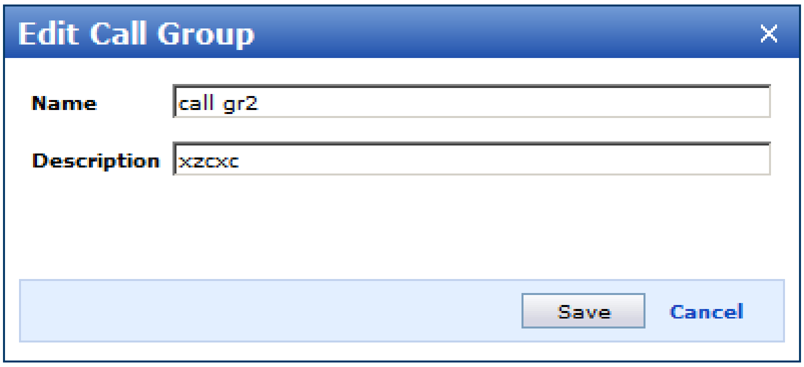


Figure 239 Modifying the call group properties

2. Edit the name of the call group in the Name field and the description in the Description field and press Save.
3. The list in the top right frame refreshes, and the call group with modified properties appears in that list.

7.2.4 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 234 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 97 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 302.

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.

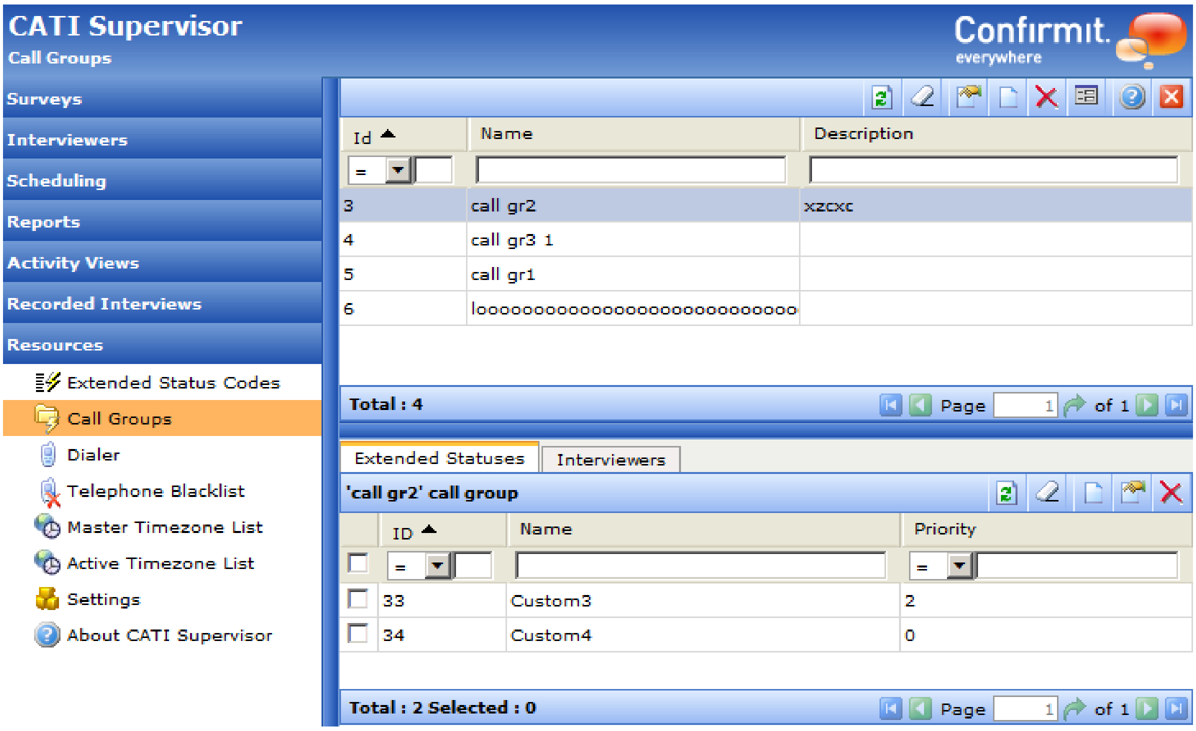


Figure 240 Viewing the Call Group parameters

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.

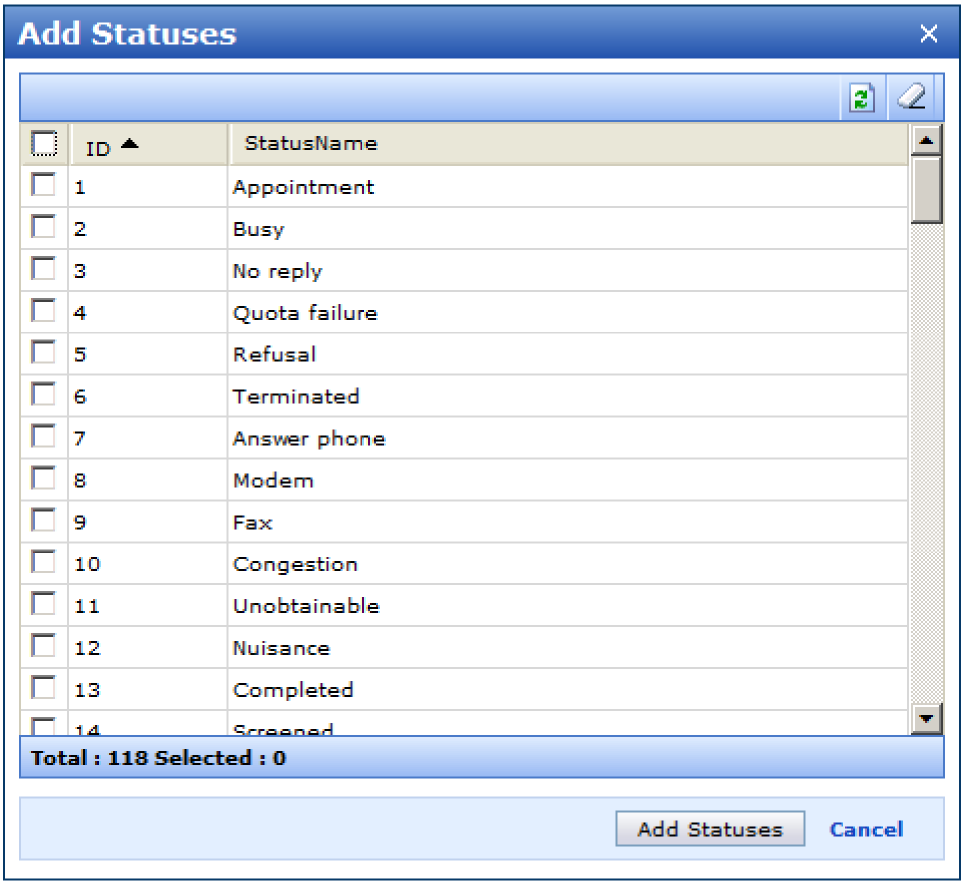


Figure 241 Adding extended statuses to the Call Group

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.

   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.

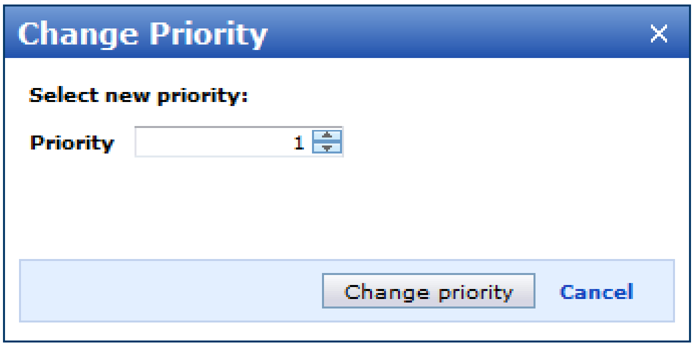


Figure 242 Changing the priority value of the selected extended status in the Call Group

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.

4. Next you can assign interviewers to the call group. Change to the Interviewers tab in the right bottom frame.

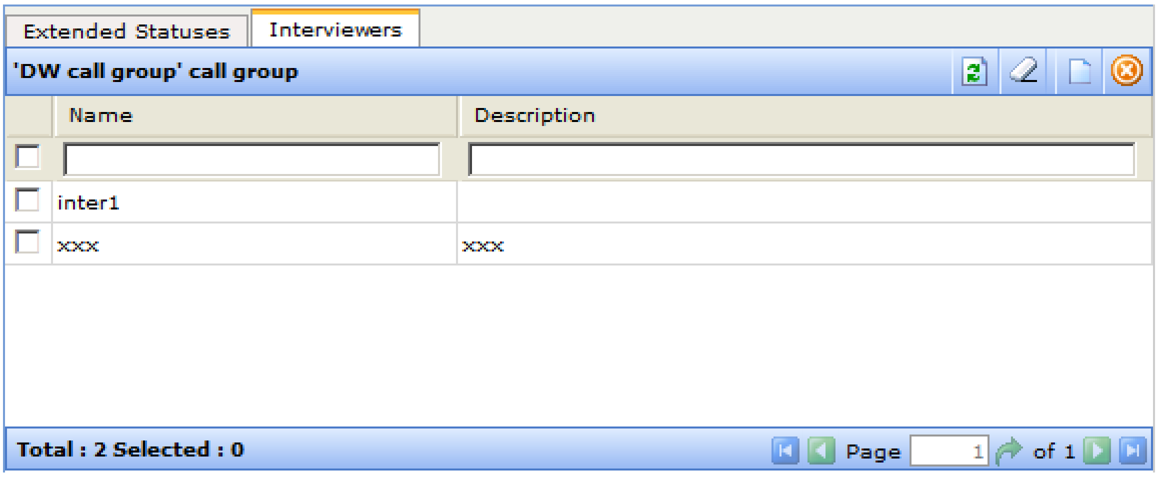


Figure 243 Managing interviewers assigned to call groups

To add an interviewer to the call group press the New button  on the toolbar. This will display the Add Assignment dialog window.

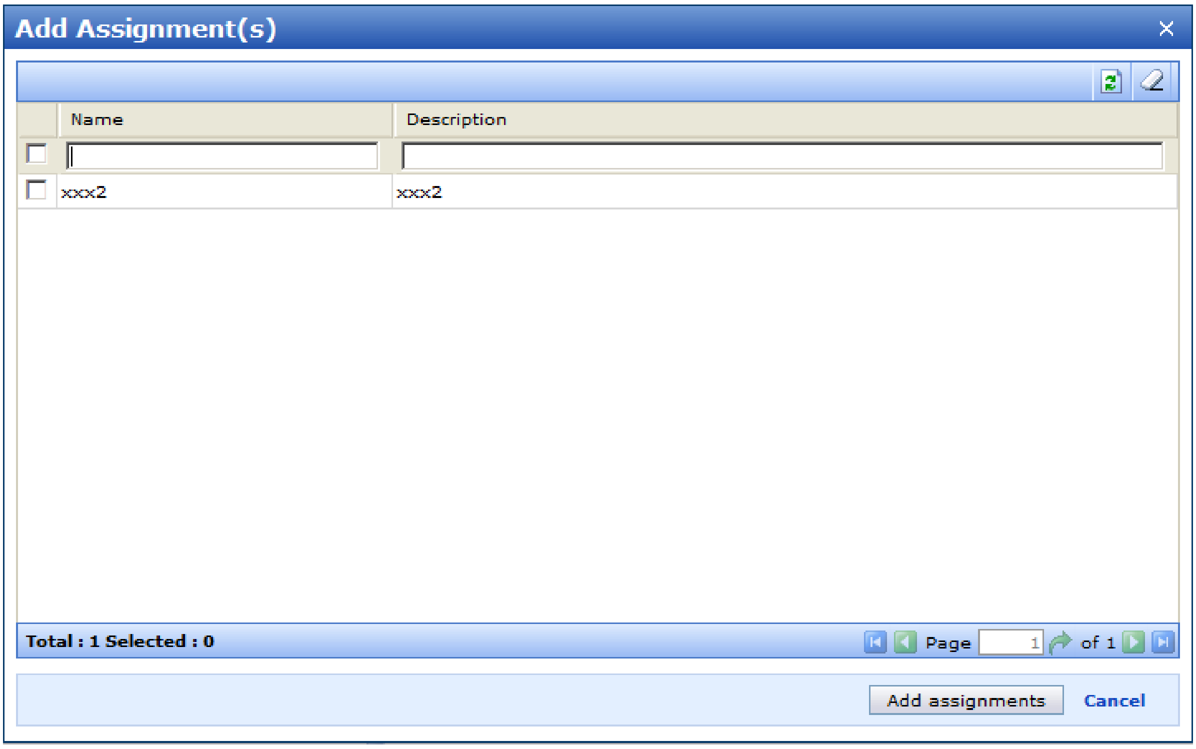


Figure 244 Assigning a new interviewer to the call group

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.

7.3 The Dialer

The Dialer in Confirmit terms stands for the dialing system. The 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 the connected calls to him in the way specified by the CATI Supervisor. In case the 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 the dialer is not involved in the interviewing process (all dialing tasks are carried out manually), and is not supposed to be available at all.

The 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 two dialer types - it can be either TCI, or ProTS. The difference between the dialer types is mostly in the service functions they provide. Please refer to the present chapter and to Enabling and configuring the Dialer on page 244 for descriptions of all dialer type related 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 247 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 two different types simultaneously.

The 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 enable it first (see Enabling and configuring the Dialer on page 244 for instructions).

The CATI Supervisor module monitors the current state of each Dialer and displays this information (see Enabling and configuring the Dialer on page 244 for details).

When the Dialer is enabled, any interviewer belonging to a company monitored by the supervisor can perform interviews using the 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 158 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 mix the "dial mode" and the "task choice mode" terms. 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 the surveys/interviews he will work with (see Selecting a Survey/Interview on page 165 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 138 for information on how to configure a scheduling script rule, and Appendix A - Action parameter descriptions on page 291 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 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 dialing mode for an interview on page 113. No other actions should be performed in that case.

7.3.1 Enabling and configuring the Dialer

The supervisor can perform the following operations with any dialer that is currently on the list:

- enable the dialer;
- configure the dialer settings.

The Dialer should be enabled to allow interviewers to engage it when they log in to work with the CATI Interviewer Console.

The CATI Supervisor is capable of working with a number of dialers concurrently. All available dialers are listed in the grid in the top right frame (each dialer is shown in a row). The supervisor can monitor the current status of each dialer, and enable the selected dialer (or a number of selected dialers at once) should the situation require such action.

Normally the Dialer is enabled once, and it remains enabled no matter if the CATI Supervisor module is launched or not. Current Dialer status is displayed in the State column in the grid in the top right frame - see the picture below.

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 the 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 75 for information).

The set of dialer settings is different for the TCI and Pro-T-S dialer types - see the pictures below.

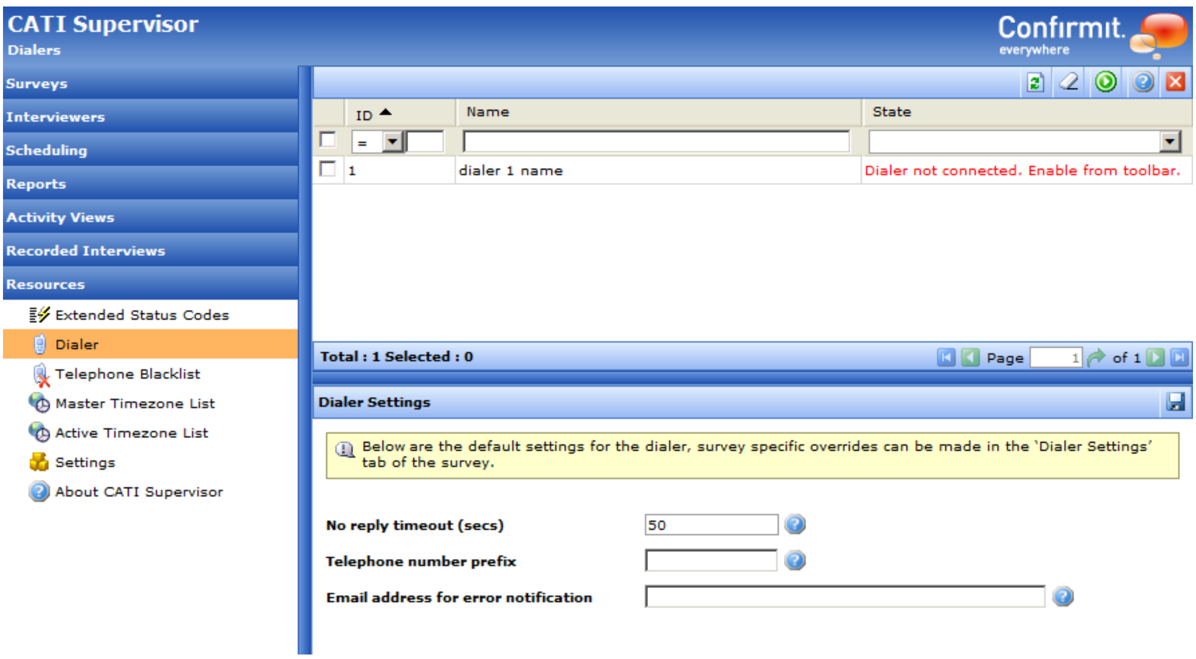


Figure 245 The Dialer object tab with the TCI type of dialers

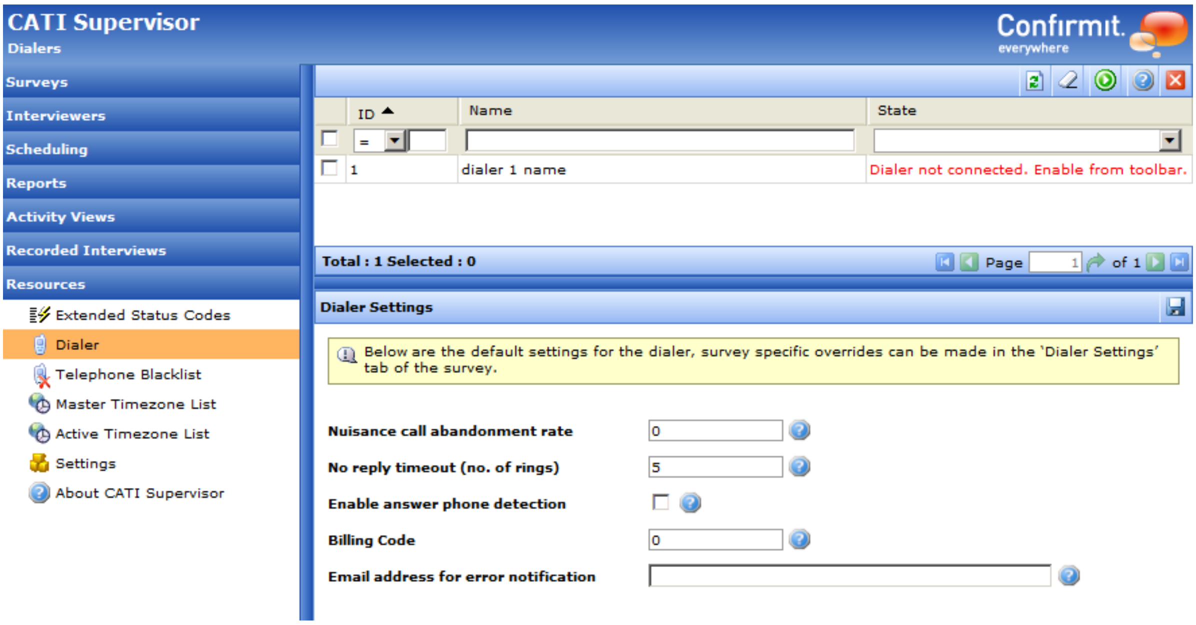


Figure 246 The Dialer object tab with the Pro-T-S type of dialers

The State column of the grid in the top right frame allows monitoring whether the Dialer is enabled, or whether the connection was lost for some reason and the Dialer requires enabling again. A situation is possible when the Dialer could not be accessed and, therefore, fails to be enabled.

The following messages displayed in the top right frame indicate Dialer's accessibility and status. Message descriptions explain the required action on the supervisor's side:

- This system is not connected to a dialer - means that the current company do not use a dialer to conduct surveys. The dialer is not supposed to work and, thus, is not accessible and cannot be enabled. No action is required.
- The Dialer is available and operational - the Dialer is enabled. This is a normal status - interviewers can engage the dialer in such case. No action is required.
- The Dialer is not connected. Enable the Dialer using the toolbar button - connection with the Dialer has been lost for some reason and should be restored. The supervisor should enable the dialer as soon as he gets this message.

The supervisor should monitor the Dialer status and perform the appropriate action if required.

To enable 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 enable in the grid. Normally the supervisor can enable only dialers with the "Not connected" state ("The Dialer is not connected. Enable the Dialer using the toolbar button" message is displayed in the State column for such dialers).
3. Press the Enable Dialer button  on the toolbar.
4. The top right frame refreshes and the Dialer status message should change to "The Dialer is available and operational". If the message in the State column does not change press the Refresh button on the toolbar. If the status is still set to "The Dialer is not connected..." even after you have tried to enable it, or if you receive an error message (for example "The Dialer initialization failed") you should contact the system administrator to make sure the connection with the service provider exists.

   Normally the Enable Dialer button should become inaccessible and should be grayed out when the Dialer status is set to "Available and operational".

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 you have made changes.

7.3.2 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 either TCI or ProTS dialer type. These two dialer types cannot be combined for simultaneous use.

The dialer settings are displayed in the bottom right frame which is named correspondingly. These settings pertain to all dialers that are currently used with the company (see Enabling and configuring the Dialer on page 244 for instructions on how to configure the dialer settings).

The picture below shows the list of dialers that are used with the current company.

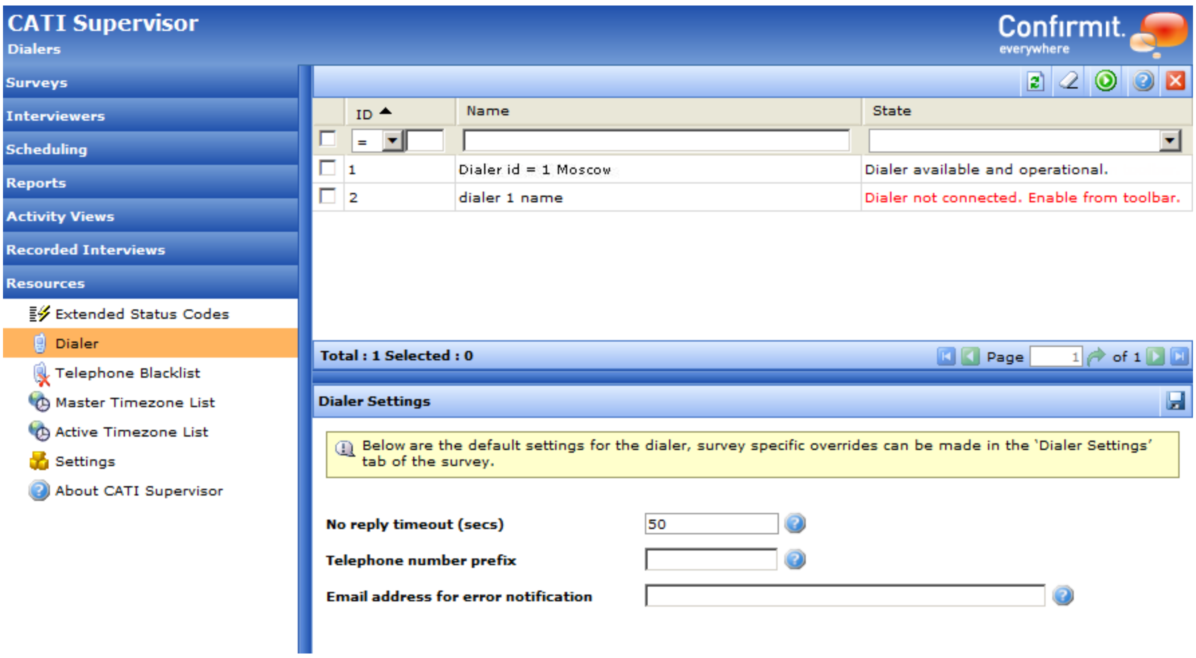


Figure 247 Multiple dialers used with a single company

The supervisor can enable the selected dialer(s) in case the connection with the dialer is lost - see Enabling and configuring the Dialer on page 244 for instructions on how to enable the dialer. But he/she cannot add or remove a dialer from the list.

The supervisor must be aware that dialers are added or removed, and all the 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. This dialer is specified for each interviewer by the administrator, and this information is also 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 158 for details).

In case the dialer which the interviewer currently works with becomes unavailable, 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 re-addressed to continue his work with another dialer.

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 206 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.

7.4 Creating 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 52).

To facilitate the blacklist creation the supervisor can import a file containing 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.

To create/edit a telephone number blacklist:

1. In the left navigation frame choose the Telephone Blacklist tab (in the Resources object tab). 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.

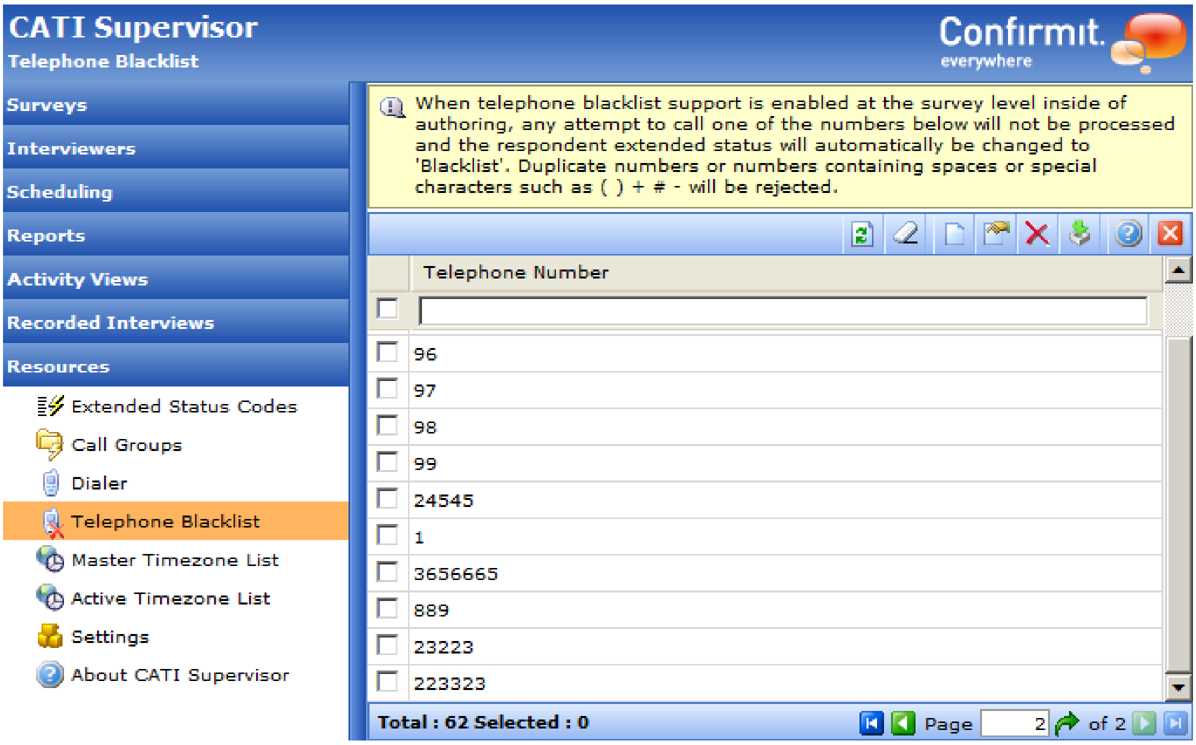


Figure 248 The Telephone number blacklist displayed in the right frame

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.

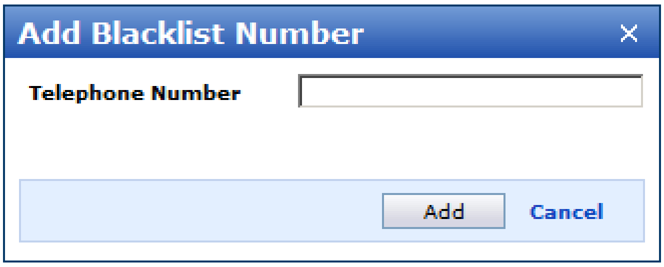


Figure 249 Adding the telephone number to the blacklist

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.

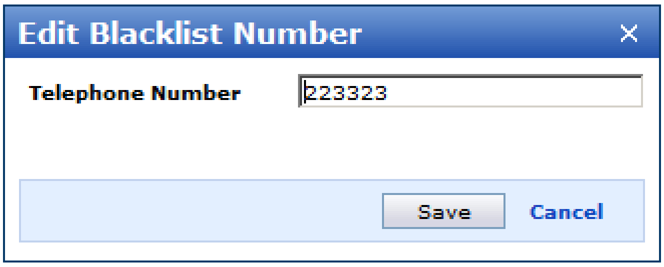


Figure 250 Editing the telephone number from the blacklist

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.

5. 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.

   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.

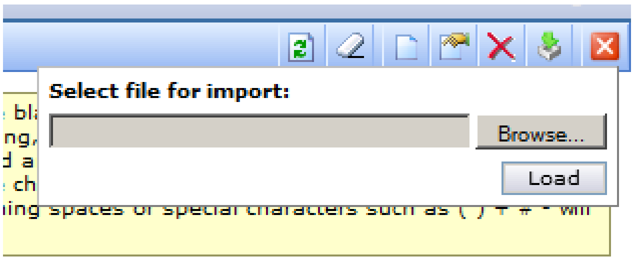


Figure 251 Importing the file containing telephone number list

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.

7.5 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 the facing page 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 299.

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.

7.5.1 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.

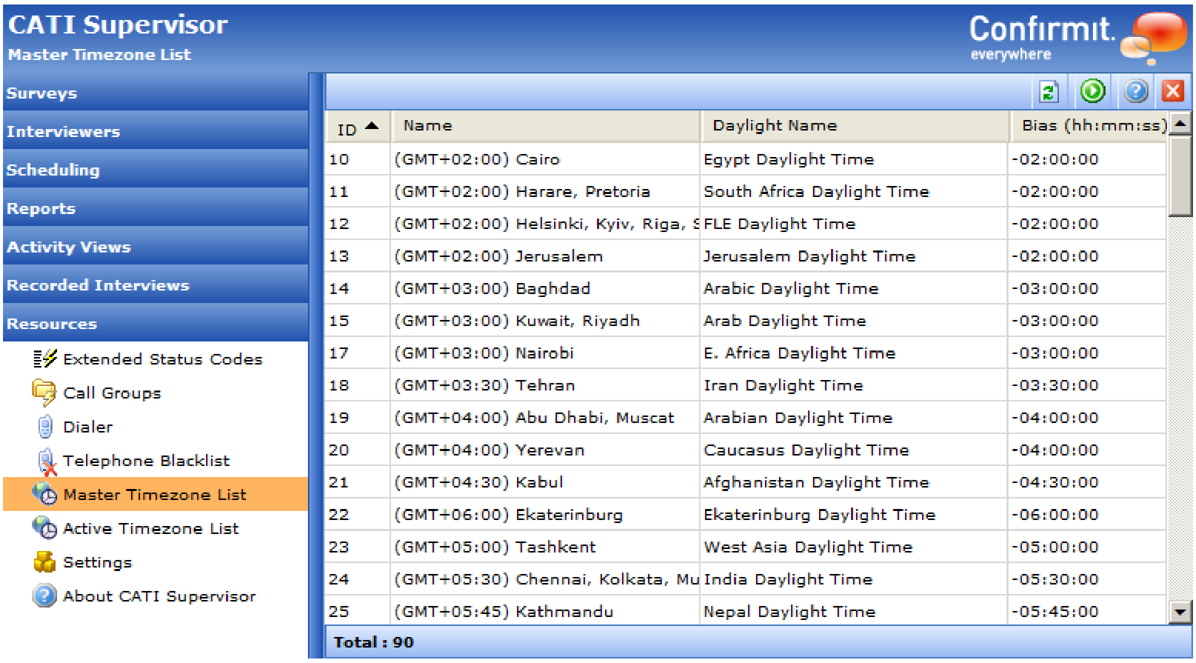


Figure 252 Viewing the Master Timezone list in the top right frame

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

7.5.2 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.

7.6 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 the previous page 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 299.

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.

7.6.1 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.

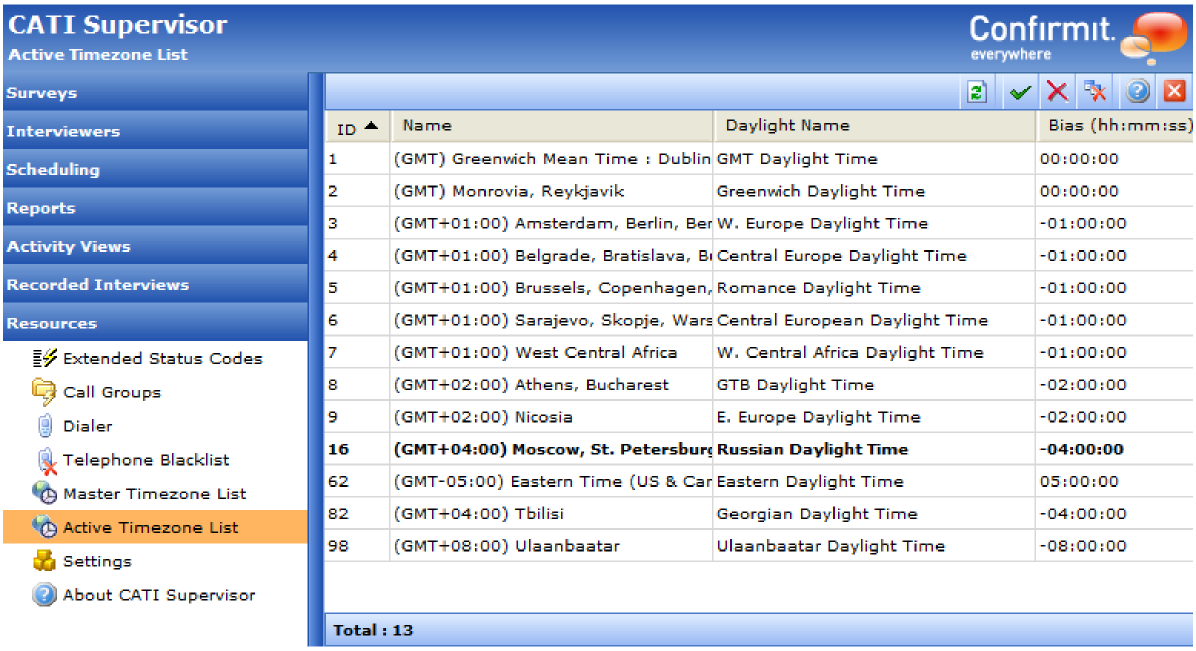


Figure 253 Viewing the Active Timezone list in the top right frame

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

7.6.2 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.

7.6.3 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.

7.6.4 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).

7.7 Configuring the interviewer related settings

CATI Supervisor module provides the following interviewer related configurable settings:

- a security feature that helps locking an interviewer account;
- a facility that allows sending out a configurable set of interviewer activity and productivity reports on a daily basis.

Note that these facilities (and the corresponding user interface described in the present topic) are available only for supervisors who are granted the CATI Administrator rights (the corresponding option is configured in Confirmit Authoring module - please consult the Confirmit Authoring manual). In case the supervisor who was not granted the CATI Administrator rights logs in to work with the CATI Supervisor module he would not be able to see the Settings tab at all.

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 29 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 29.

Automatic account locking option setup is performed on the Settings tab of the Resources object.

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 29 for instructions. Manual account unlocking is the only way to unlock the interviewer account that has been locked automatically.

The supervisor can schedule emailing of the call activity and productivity reports to the selected interviewers 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. 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 filtering and can be enabled for delivery once per day.

File attachment size for each email is limited to 10Mb, if the email attachment exceeds this limit the email will not be delivered, instead an error email will be sent.

To configure interviewer account locking settings:

1. Choose the Settings tab in the Resources object menu in the Navigation frame. Choose the Settings object. This will display the interviewer related settings in the top right frame.

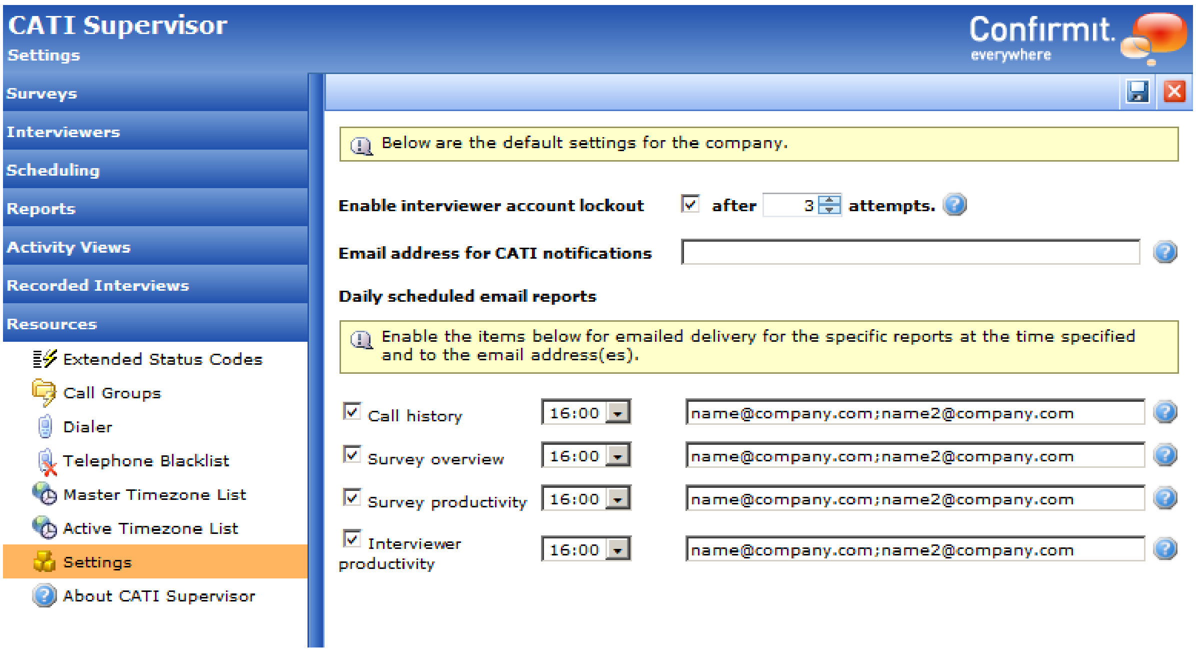


Figure 254 Configuring interviewer account locking settings

2. Interviewer account locking settings are enabled after you check the corresponding box - "Enable interviewer account locking".

   Next you should choose the amount of consecutive unsuccessful login attempts after which the account will be locked automatically. Use the spin control to specify the attempt amount.
3. The "Email address for CATI notifications" field is used for entering the email addresses to which the notification will be sent each time any interviewer's account is locked. Email addresses are separated by a semicolon.

To configure report emailing settings:

1. Choose the Settings tab in the Resources object menu in the Navigation frame. Choose the Settings object. This will display the interviewer related settings in the top right frame.

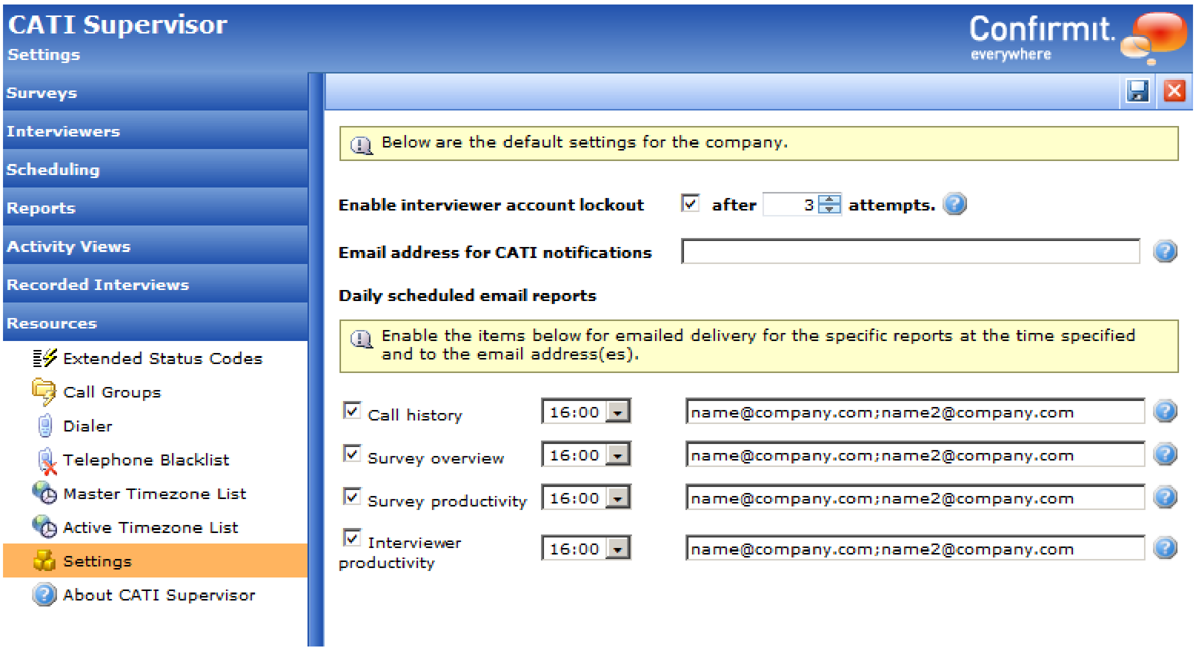


Figure 255 Configuring reports to be emailed to the interviewers

2. Check the box in front of the corresponding report type to enable emailing of this report. Clear the box to disable emailing of this report.
3. From the drop-down list choose the time at which the email will be sent each day.
4. Finally enter the email addresses to which the report will be sent. Email addresses are entered separated by a semicolon.

7.8 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 256 Viewing the general software information

8 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 262)
- Survey Productivity report (see Generating the Survey Productivity Report on page 259)
- Sample Status Summary (see Generating the Sample Status Summary report on page 266)
- Call Attempts Log (see Viewing the Call Attempts report on page 279)
- Interviewer Productivity (see Generating the Interviewer Productivity Report on page 268)
- Interviewer Breaks (see Generating the Interviewer Breaks report on page 272)
- Attempts by Disposition (see Generating the Attempts by Disposition report on page 275)
- Number of Attempts (see Generating the Number of attempts report on page 277)
- Interviewer Submission Details (see Viewing the Interviewer Submission Details Log on page 281)
- Aggregated Interviewer Submission (see Generating the Aggregated Interviewer Submission Report on page 284)

Reports can be configured with the help of interface provided by the Reports 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.

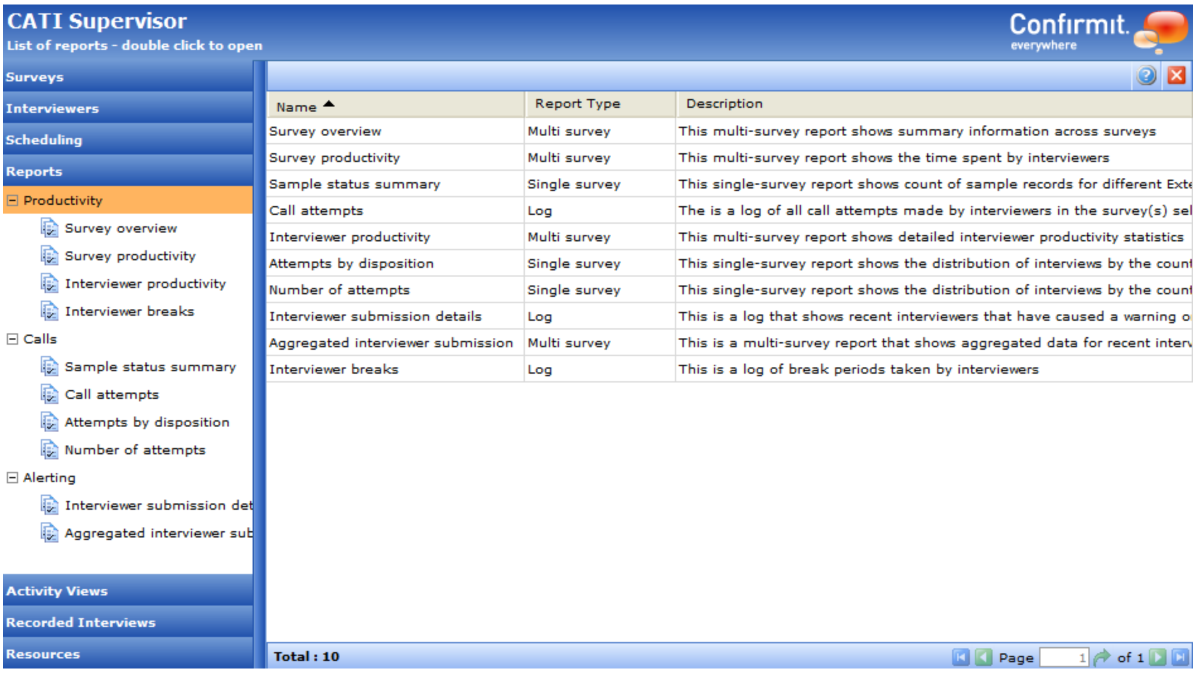


Figure 257 The Reports object list

8.1 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.

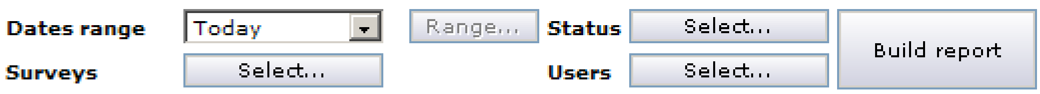


Figure 258 Configuring the Survey Productivity Report

This window interface lets you configure all the parameters required to generate the Productivity Report.

2. The Date Range drop-down box allows selecting the time period for which the report should be generated. You can select a period from the drop-down list, or you can choose to define the period manually (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.

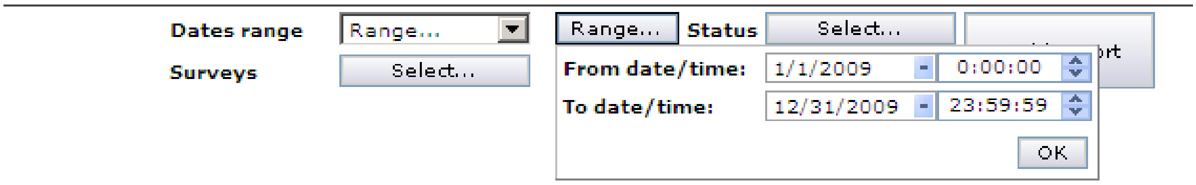


Figure 259 Choosing the date range for the Survey Productivity Report

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.

3. 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.

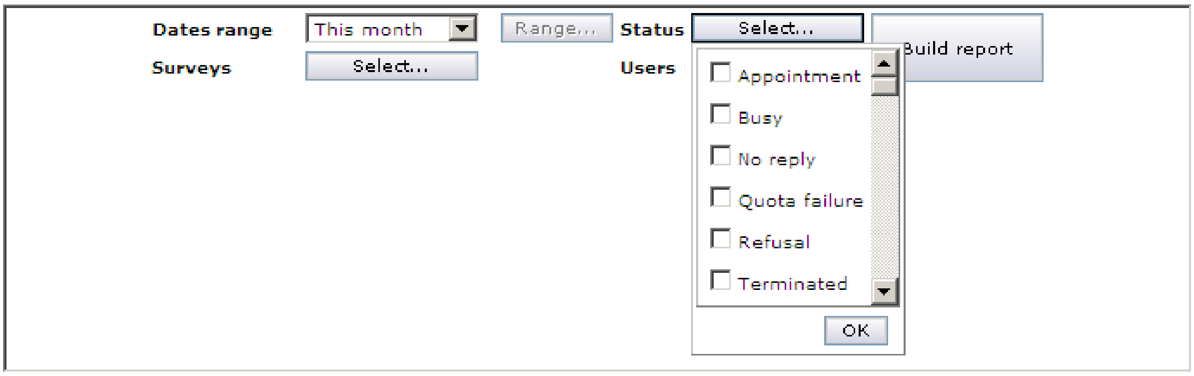


Figure 260 Selecting extended statuses to include into the Survey Productivity Report

4. The Productivity Report allows selecting a number of surveys 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 window on page 201). Press OK in the form to save this setting.
5. Finally you should select users for which this report will be generated. Press the Select button to display the User Search form.

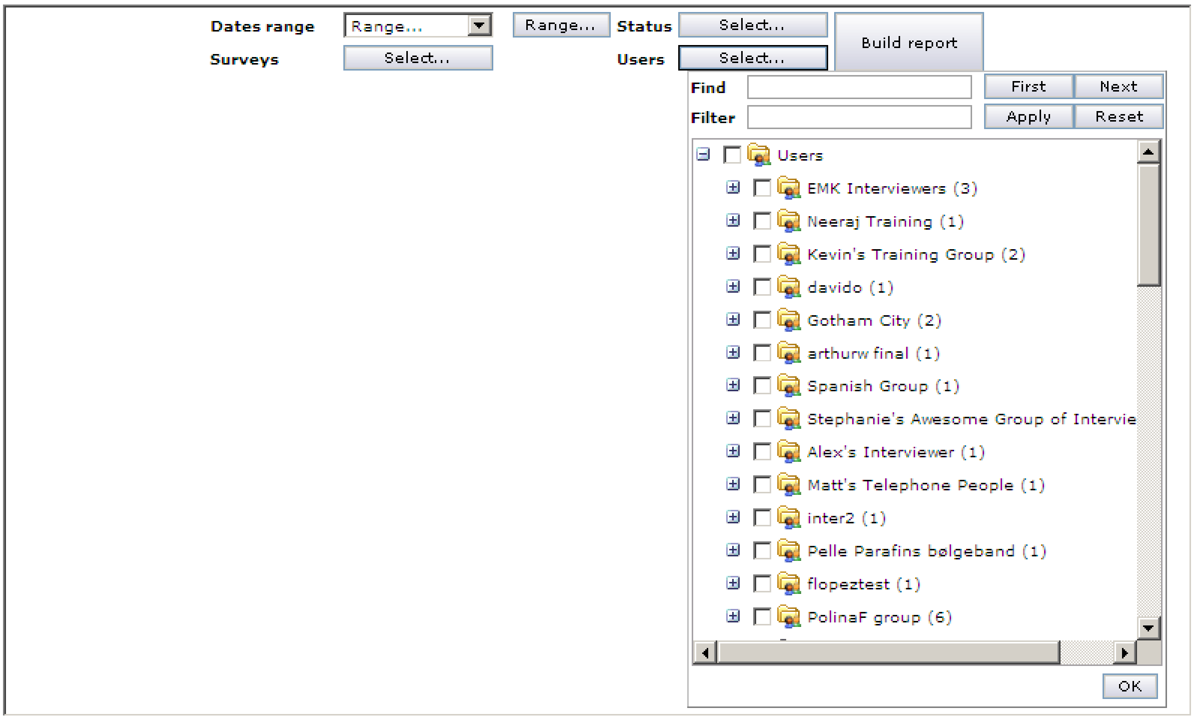
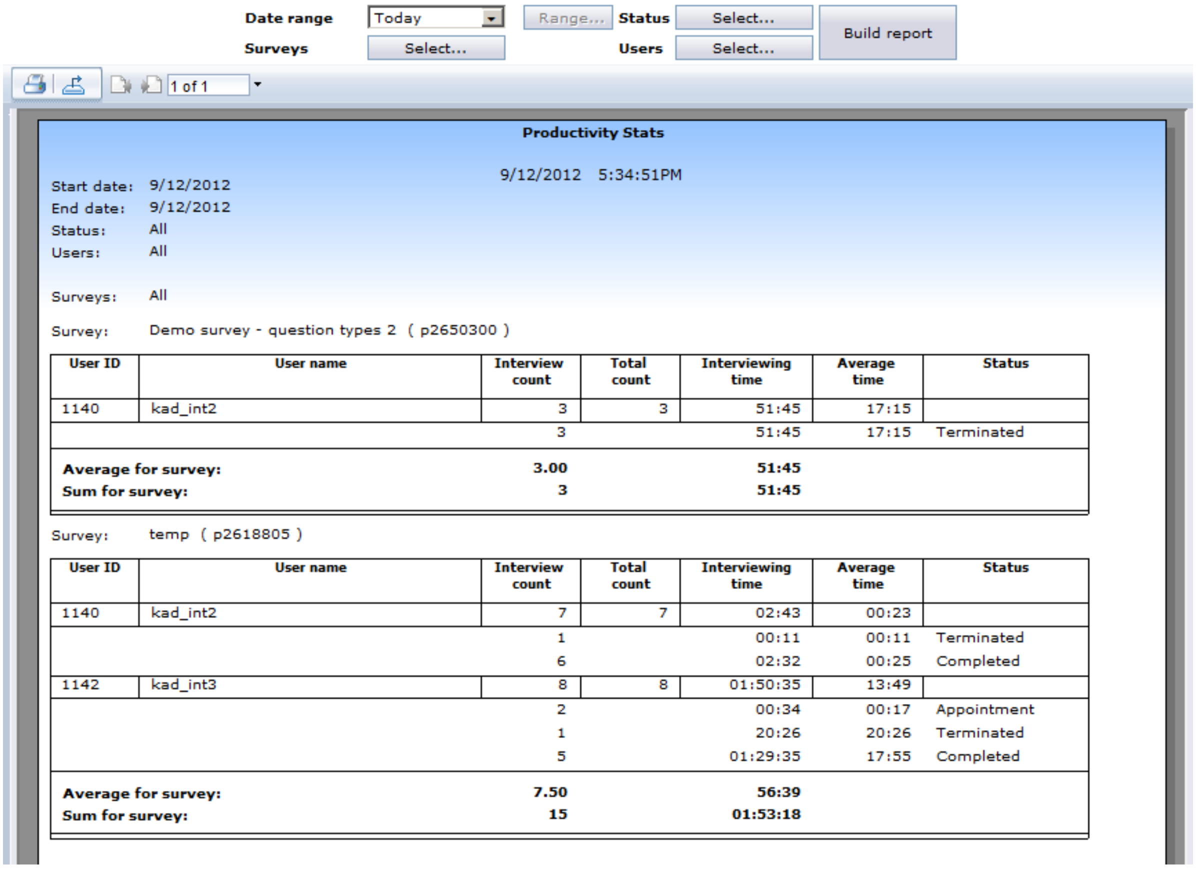


Figure 261 Selecting users to include into the Survey Productivity Report

This form uses the same approach to selecting users as the Survey Search form described on the previous step. Press OK to save this setting.

6. Press the Build Report button to generate the Survey Productivity Report.



Productivity Stats

9/12/2012 5:34:51PM

Start date: 9/12/2012
End date: 9/12/2012
Status: All
Users: All

Surveys: All

Survey: Demo survey - question types 2 (p2650300)

User ID	User name	Interview count	Total count	Interviewing time	Average time	Status
1140	kad_int2	3	3	51:45	17:15	
		3		51:45	17:15	Terminated
Average for survey:		**3.00**		**51:45**		
Sum for survey:		**3**		**51:45**		

Survey: temp (p2618805)

User ID	User name	Interview count	Total count	Interviewing time	Average time	Status
1140	kad_int2	7	7	02:43	00:23	
		1		00:11	00:11	Terminated
		6		02:32	00:25	Completed
1142	kad_int3	8	8	01:50:35	13:49	
		2		00:34	00:17	Appointment
		1		20:26	20:26	Terminated
		5		01:29:35	17:55	Completed
Average for survey:		**7.50**		**56:39**		
Sum for survey:		**15**		**01:53:18**		

Figure 262 The generated Survey Productivity 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 arrow button in the drop-down box and choose Go to First page to jump to the first report page, or choose Go to Last page to jump to the last report page.

8. The generated report can be exported and printed out – refer to Exporting the generated report on page 288 and Printing out the generated report on page 289 for instructions.

8.2 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).

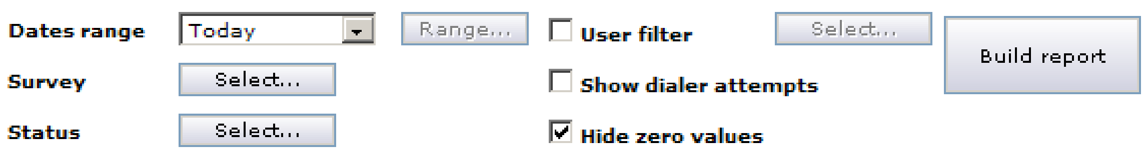


Figure 263 Configuring the Survey Overview Report

This interface lets you configure all the parameters required to generate the Survey Overview Report.

2. The Date Range drop-down box allows selecting the time period for which the report should be generated. You can select a period from the drop-down list, or you can 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.

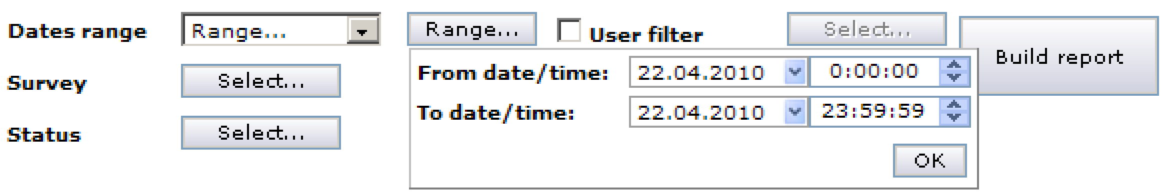


Figure 264 Choosing the date range for the Survey Overview Report

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.

3. 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.

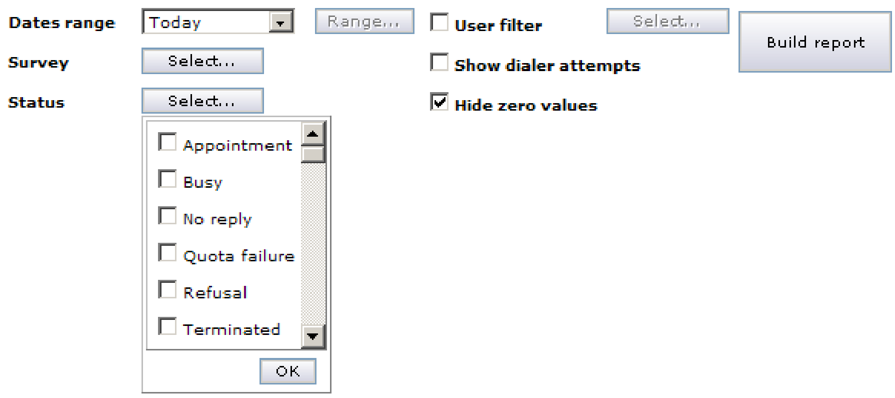


Figure 265 Selecting extended statuses to include into the Survey Overview Report

4. The Survey Overview Report allows selecting a number of surveys for which it will be 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 window on page 201). Press OK in the form to save this setting.
5. 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.
6. 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.
5. Finally you can select users for which this report will be generated. Check the User filter box and press the Select button to the right of this box to display the User Filter form.

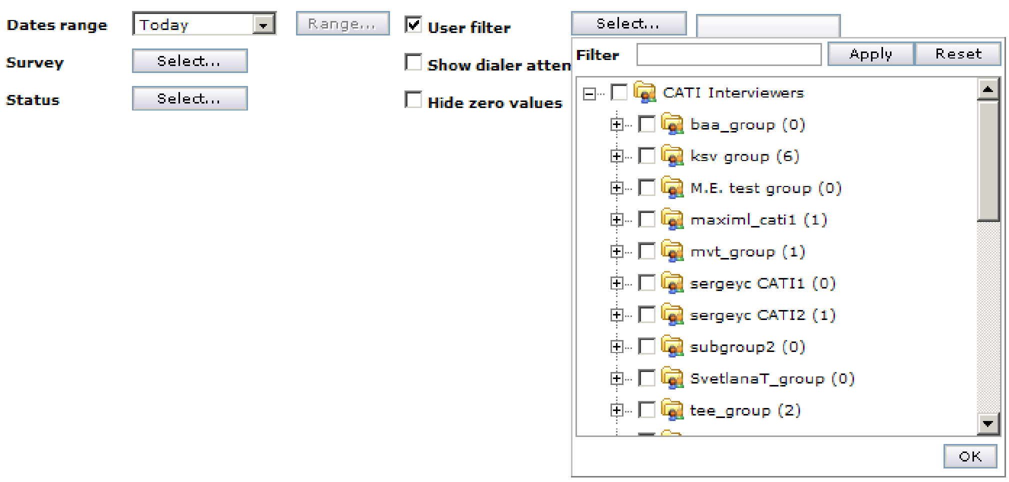


Figure 266 Selecting users to include into the Survey Overview Report

This form uses the same approach to selecting users as the Survey Search form described in step 4. Press OK in the form to save this setting.

6. Press the Build Report button to generate the Survey Overview Report.

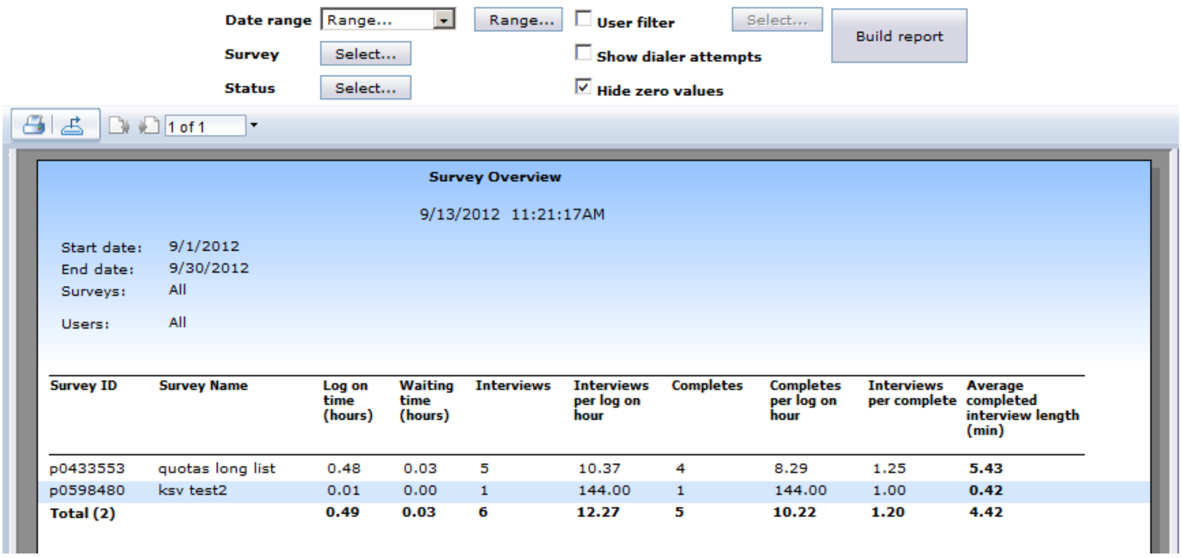


Figure 267 The generated Survey Overview Report

7. 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

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 arrow button in the drop-down box and choose Go to First page to jump to the first report page, or choose Go to Last page to jump to the last report page.

9. The generated report can be exported and printed out – refer to Exporting the generated report on page 288 and Printing out the generated report on page 289 for instructions.

8.3 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).

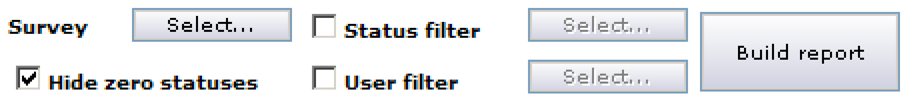


Figure 268 Configuring the Sample Status Summary Report

This window interface lets you configure all the parameters required to generate the Sample Status Summary Report.

2. The Sample Status Summary Report allows selecting a single 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 window on page 201). Press OK in the form to save this setting.
3. 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.

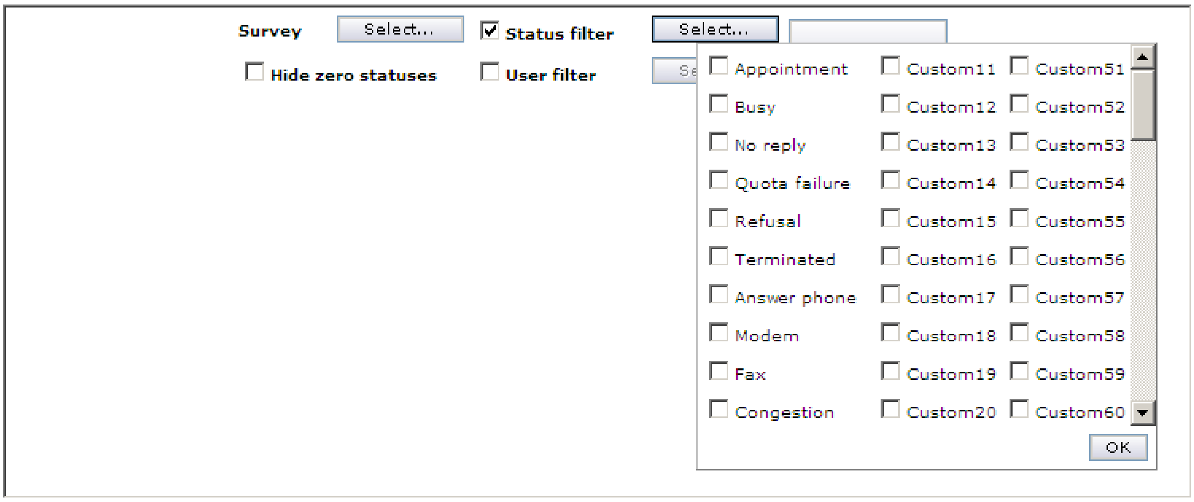


Figure 269 Applying extended status filter to the Sample Status Summary Report

Put a check in front of extended statuses you want to include in the Sample Status Summary Report. Press OK to save this setting.

4. Check the Hide zero statuses box to apply this option. If there are no interviews in some extended status, this status will automatically be excluded from the report.
5. Check the User filter option to select users for inclusion into the Sample Status Summary Report.

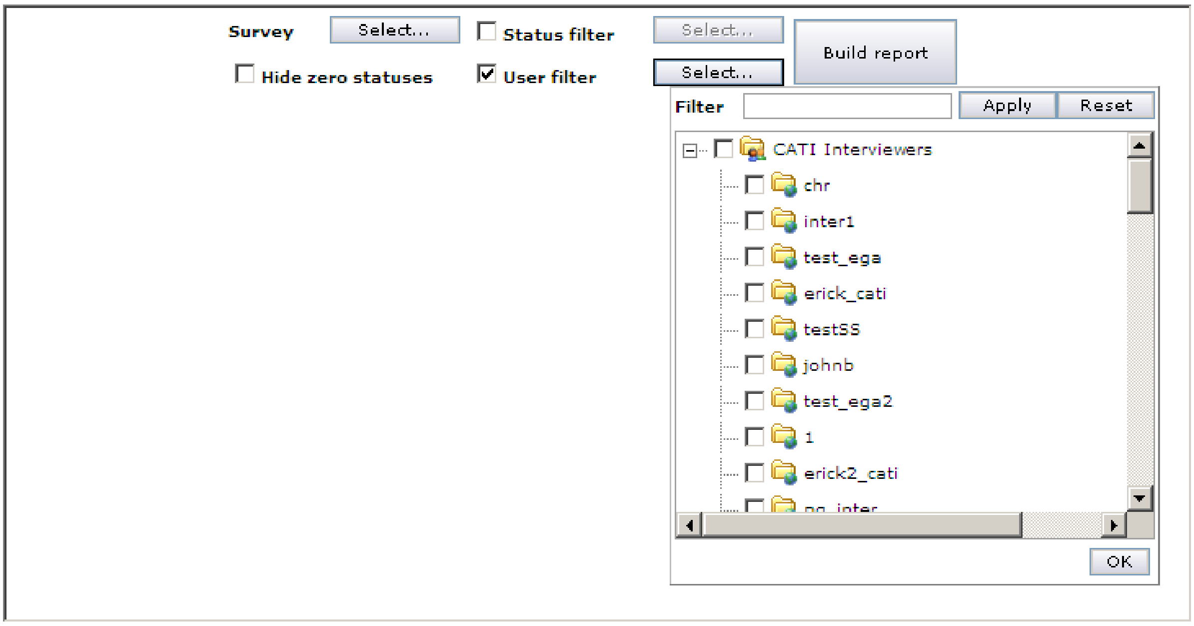


Figure 270 Applying the user filter to the Sample Status Summary Report

This form uses the same approach to selecting users as the Survey Search form (see description of this form here - Selecting surveys to display in the grid in the Survey List window on page 201). Press OK to save this setting.

6. Press the Build Report button to generate the Sample Status Summary Report.

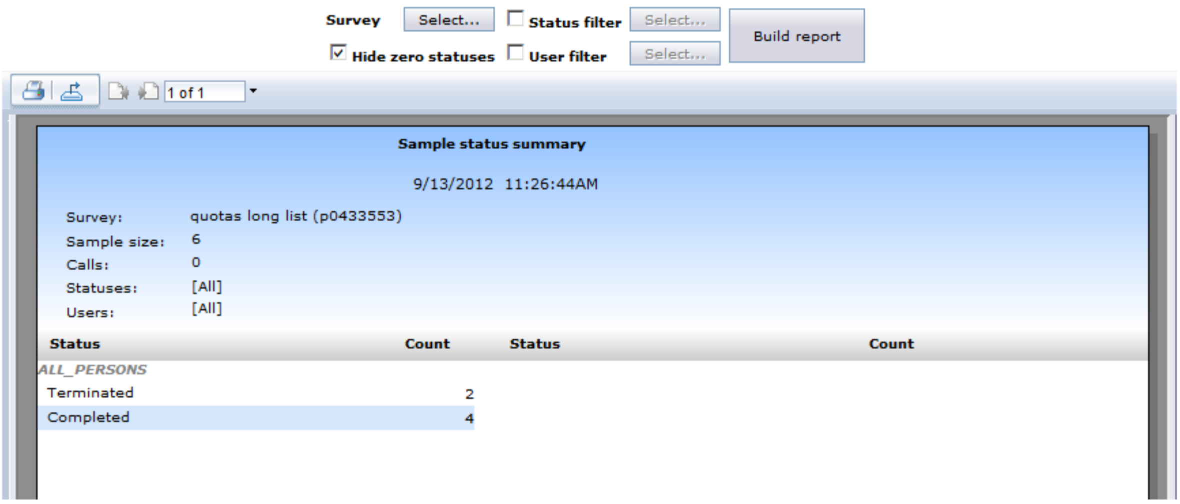


Figure 271 The generated Sample Status Summary Report

7. In case the generated report is large enough and occupies more than one page you can navigate through its pages using the browsing controls displayed above the report header.

   If the current report page does not fit into the application window it can be scrolled with the help of the scroll bar displayed on the right side of the frame.

   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 arrow button in the drop-down box and choose Go to First page to jump to the first report page, or choose Go to Last page to jump to the last report page.

8. The generated report can be exported and printed out – refer to Exporting the generated report on page 288 and Printing out the generated report on page 289 for instructions.

8.4 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).

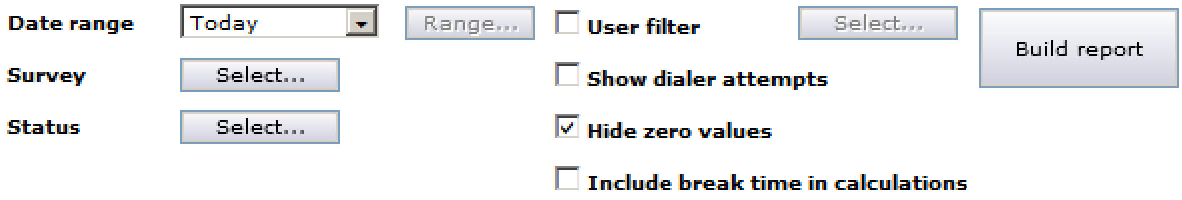


Figure 272 Configuring the Interviewer Productivity Report

This interface lets you configure all the parameters required to generate the Interviewer Productivity Report.

3. The Interviewer Productivity 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 window on page 201). 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.

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.

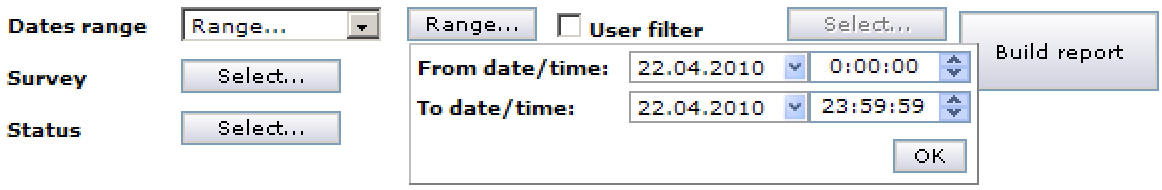


Figure 273 Choosing the date range for the Survey Overview Report

   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. 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.

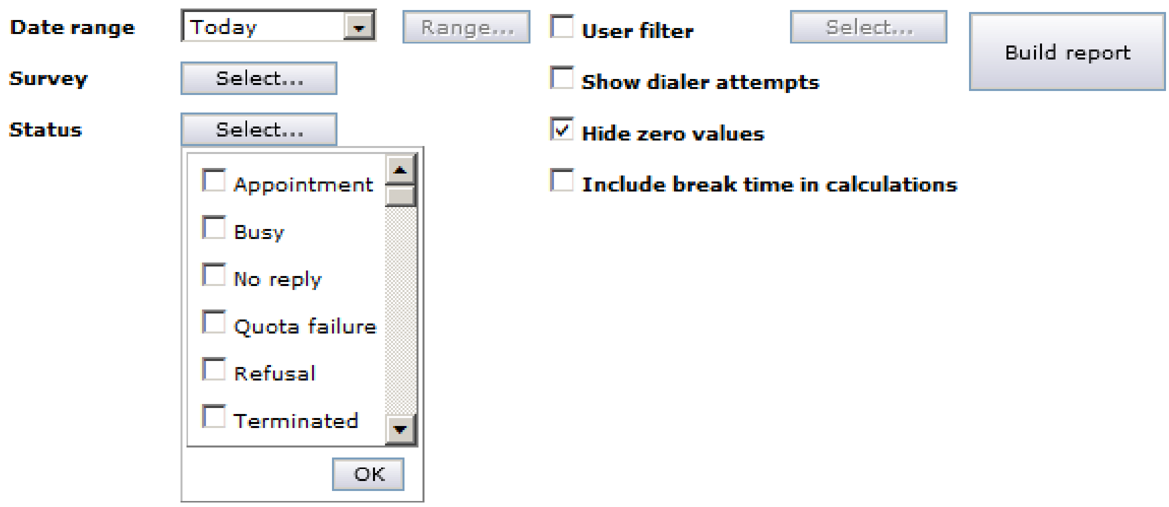


Figure 274 Selecting extended statuses to include into the Interviewer Productivity Report

6. The Interviewer Productivity Report allows selecting a number of surveys for which it will be 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 window on page 201). Press OK in the form to save this setting.
7. You can select interviewers for which this report will be generated. Check the User filter box to enable this option, and press the Select button to display the Interviewer Search form.

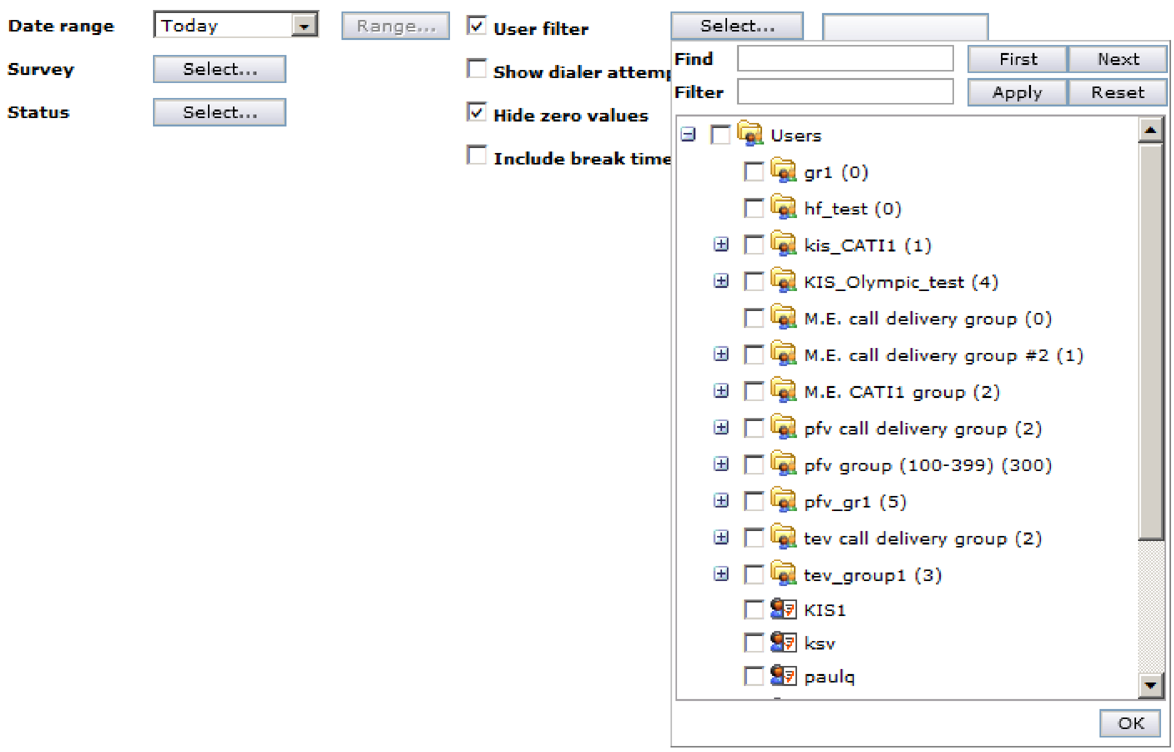


Figure 275 Selecting interviewers to include into the Interviewer Productivity Report

This form uses the same approach to selecting users as the Survey Search form described in step 5. Press OK in the form to save this setting.

8. 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.
9. 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.
10. 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, it won’t.
11. Press the Build Report button to generate the Interviewer Productivity Report.

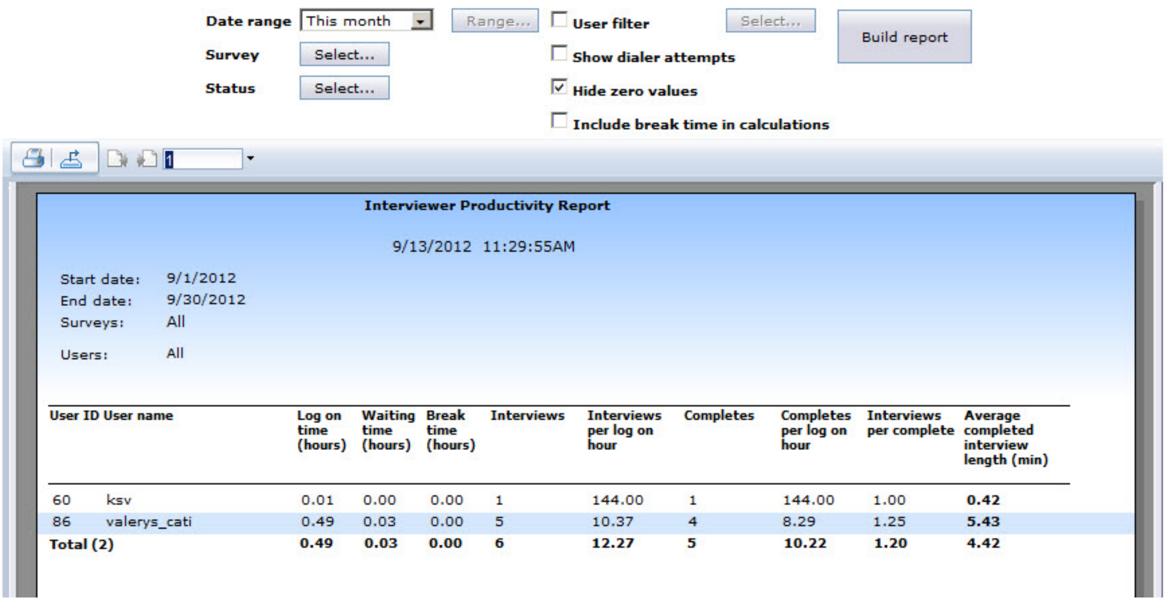


Figure 276 The generated Interviewer Productivity Report

12. 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
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) in the date range selected
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

13. 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 arrow button in the drop-down box and choose Go to First page to jump to the first report page, or choose Go to Last page to jump to the last report page.

14. The generated report can be exported and printed out – refer to Exporting the generated report on page 288 and Printing out the generated report on page 289 for instructions.

8.5 Generating the Interviewer Breaks report

The Interviewer Breaks Report is a log listing all breaks taken by all interviewers over the selected period of time.

For more information regarding the interviewer breaks please refer to Interviewer on a break on page 186.

The Interviewer Breaks Report report contains the following data displayed in columns:

- Interviewer - the login name of the interviewer;
- Date (local timezone) - the date on which the break was taken (interviewer's time zone);
- Duration (mm:ss) - the duration of the break in minutes and seconds (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).

After the Interviewer Breaks report is generated and displayed, supervisor can filter the report contents by any column shown in this report.

To generate the Interviewer Breaks report:

1. Choose the Reports object tab in the left Navigation frame.
2. Double-click the Interviewer Breaks 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 right frame of the CATI Supervisor window.

   By default the Call Attempts report displays all breaks for all interviewers logged during the current day - "Today" option is selected in the Date column. The picture below shows the Interviewer Breaks report generated for the current month.

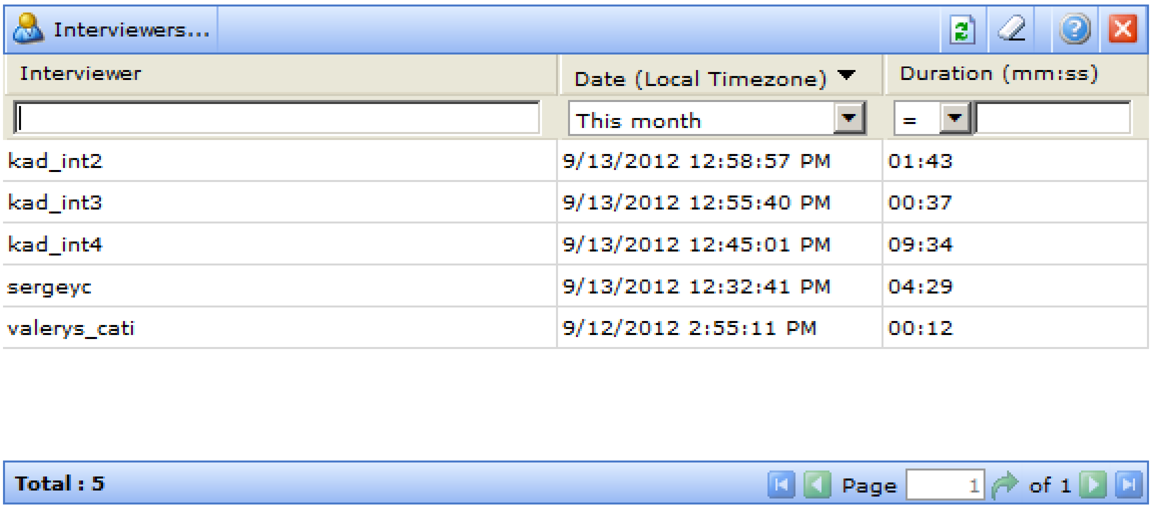


Figure 277 Interviewer breaks report generated for the current month

3. You can choose to generate a report for selected interviewers only.

   To select interviewers press the Interviewers button 

 on the frame toolbar. This will display the Interviewer search form right below this button.

   The form contains the Find and Filter fields, and the complete list of interviewers and interviewer groups in the form of a hierarchical tree with checkboxes that allow selecting the interviewer/interviewer group.

   By default all boxes are checked and all items are selected.

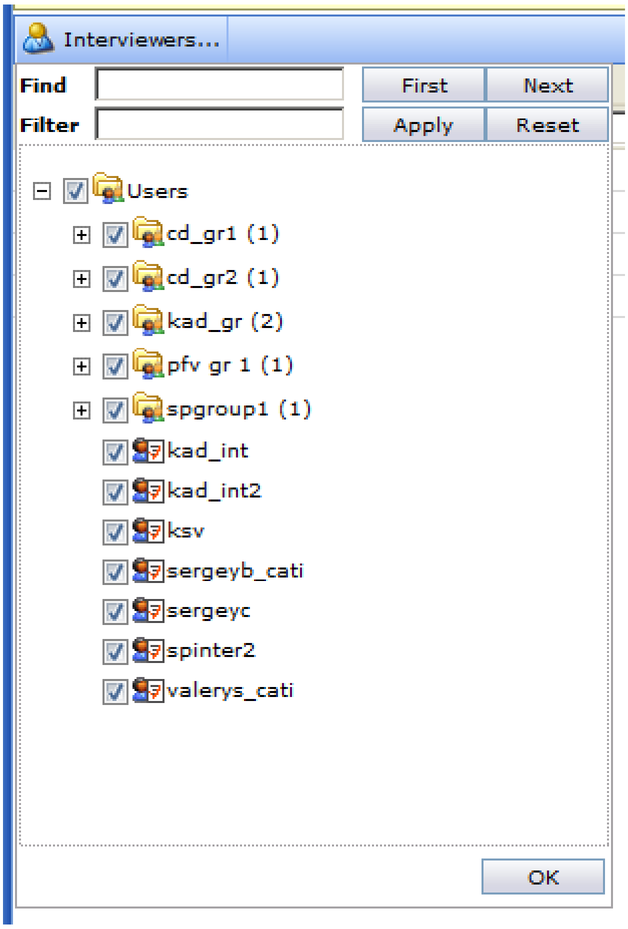


Figure 278 Selecting interviewers to include in the Interviewer Breaks report

Use the Find field to enter all or part of the interviewer name and press the First button to skip to the first matching interviewer. The interviewer's name is highlighted in the hierarchical tree to let you locate it. Pressing the Next button will take you to the next matching interviewer and so on until the end of the list is reached.

You can select all or part of the interviewers you have found (by checking boxes next to their names).

Alternatively you can apply a filter to select simultaneously all the interviewers with the name matching the string entered in the Filter field. Enter the name (or part of it) in the Filter field and press the Apply button. All the matching interviewers are then checked.

Filtered results and the Filter field contents can be cleared by pressing the Reset button.

Press OK when you are done selecting interviewers. This will update the interviewer break list in the top right frame, generating it for selected interviewers only.

4. You can generate a report for a period you select in the drop-down list in the Date column header. All available periods are fixed periods - you cannot select 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 the Refresh button in the frame toolbar. The frame contents are then 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 Date, 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.

8.6 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).

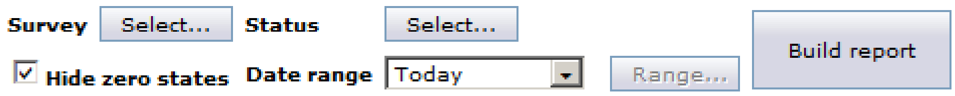


Figure 279 Configuring the Attempts by disposition Report

   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 window on page 201). 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.

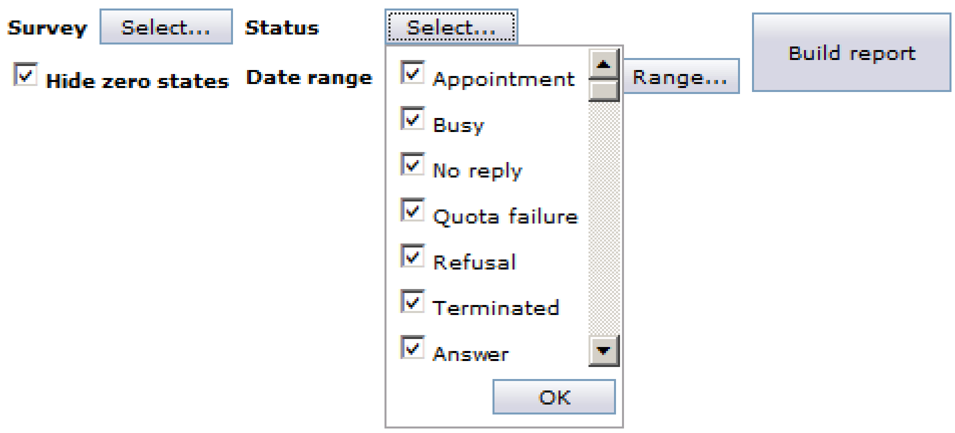


Figure 280 Selecting extended statuses to include into the Attempts by disposition Report

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.

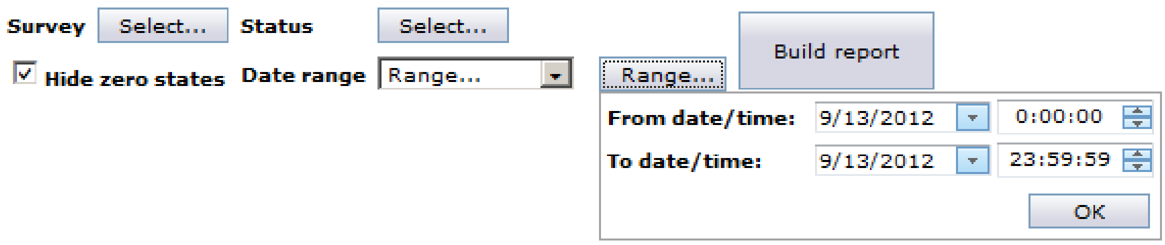


Figure 281 Choosing the date range for the Attempts by disposition Report

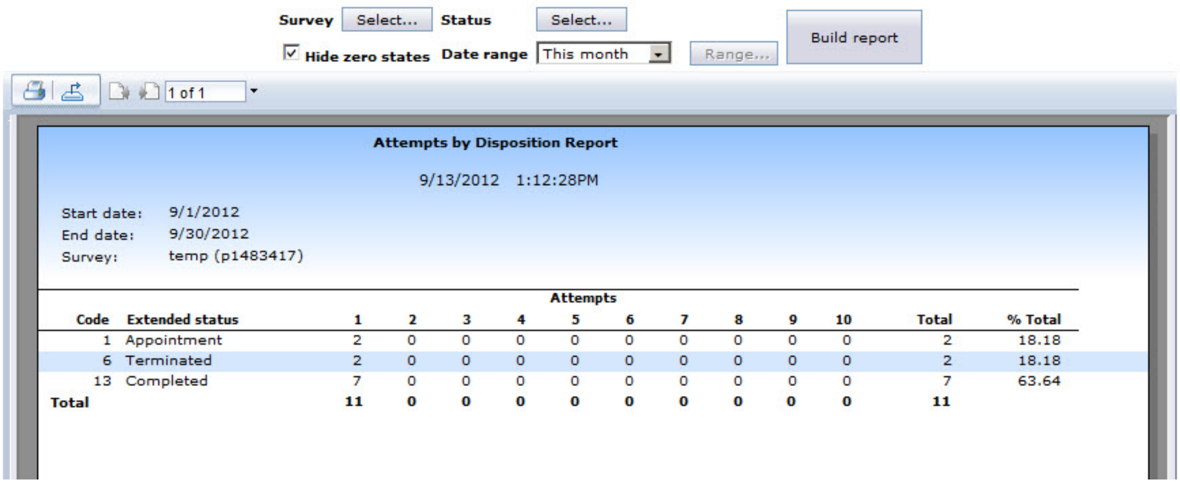
Specify the start and finish time of the desired period using the From and To fields. These fields include the calendar form which opens when you press the arrow button in the date field, and the time spinbox which allows increasing and decreasing value with the help of the buttons, or entering the value 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.



		Attempts											
Code	Extended status	1	2	3	4	5	6	7	8	9	10	Total	% Total
1	Appointment	2	0	0	0	0	0	0	0	0	0	2	18.18
6	Terminated	2	0	0	0	0	0	0	0	0	0	2	18.18
13	Completed	7	0	0	0	0	0	0	0	0	0	7	63.64
Total		11	0	0	0	0	0	0	0	0	0	11	

Figure 282 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 arrow button in the drop-down box and choose Go to First page to jump to the first report page, or choose Go to Last page to jump to the last report page.

8. The generated report can be exported and printed out – refer to Exporting the generated report on page 288 and Printing out the generated report on page 289 for instructions.

8.7 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).

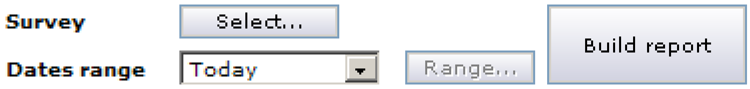


Figure 283 Configuring the Number of attempts Report

This window interface lets you configure all the parameters required to generate the Number of attempts Report.

3. The Number of attempts 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 window on page 201). 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.

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.

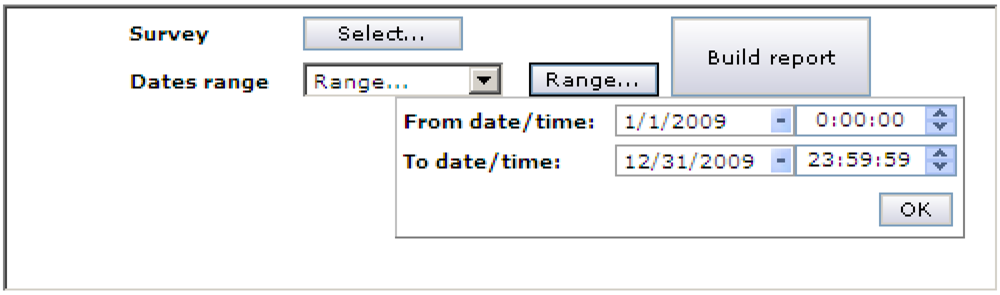


Figure 284 Choosing the date range for the Number of Attempts Report

   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.

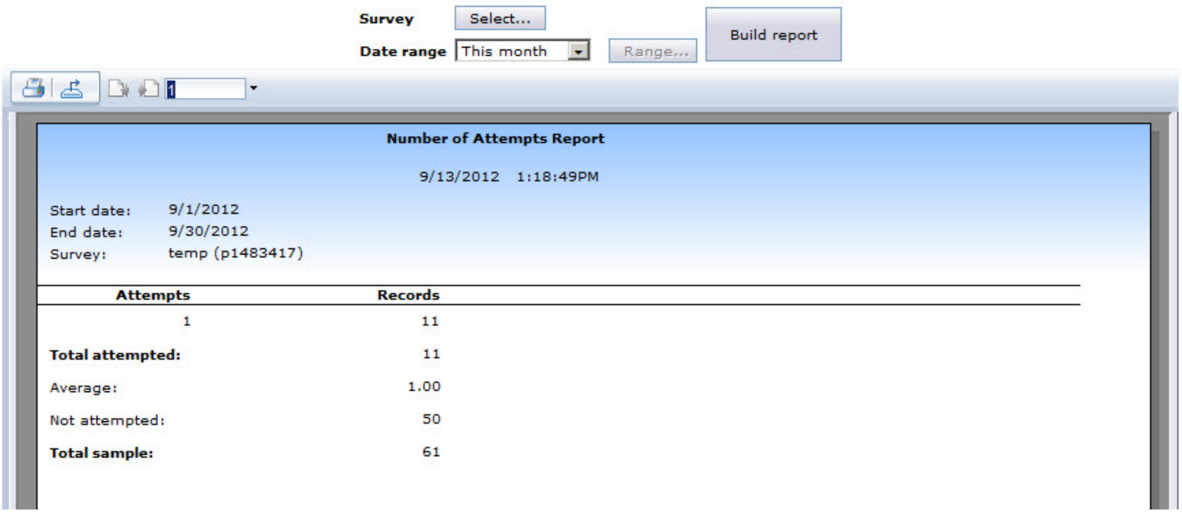


Figure 285 The generated Number of Attempts Report

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 arrow button in the drop-down box and choose Go to First page to jump to the first report page, or choose Go to Last page to jump to the last report page.
7. The generated report can be exported and printed out – refer to Exporting the generated report on page 288 and Printing out the generated report on page 289 for instructions.

8.8 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).

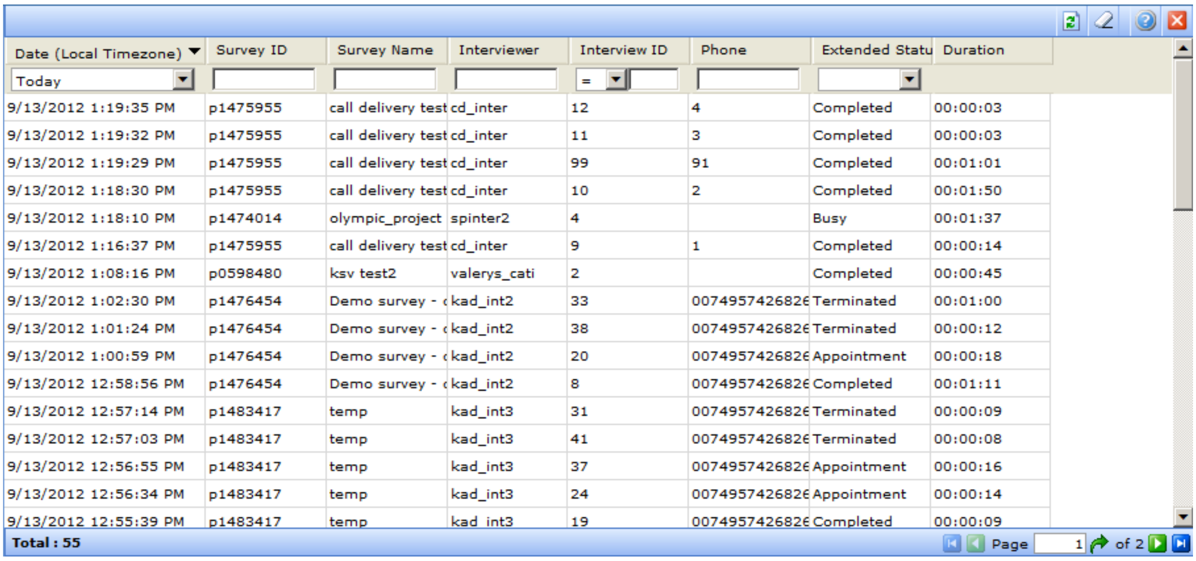
The Call attempts report can be generated from the Reports tab for all surveys, or from the All Surveys list for a certain survey.

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	007495742682	Terminated	00:01:00
9/13/2012 1:01:24 PM	p1476454	Demo survey - (	kad_int2	38	007495742682	Terminated	00:00:12
9/13/2012 1:00:59 PM	p1476454	Demo survey - (	kad_int2	20	007495742682	Appointment	00:00:18
9/13/2012 12:58:56 PM	p1476454	Demo survey - (	kad_int2	8	007495742682	Completed	00:01:11
9/13/2012 12:57:14 PM	p1483417	temp	kad_int3	31	007495742682	Terminated	00:00:09
9/13/2012 12:57:03 PM	p1483417	temp	kad_int3	41	007495742682	Terminated	00:00:08
9/13/2012 12:56:55 PM	p1483417	temp	kad_int3	37	007495742682	Appointment	00:00:16
9/13/2012 12:56:34 PM	p1483417	temp	kad_int3	24	007495742682	Appointment	00:00:14
9/13/2012 12:55:39 PM	p1483417	temp	kad_int3	19	007495742682	Completed	00:00:09

Total : 55 Page 1 of 2

Figure 286 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.

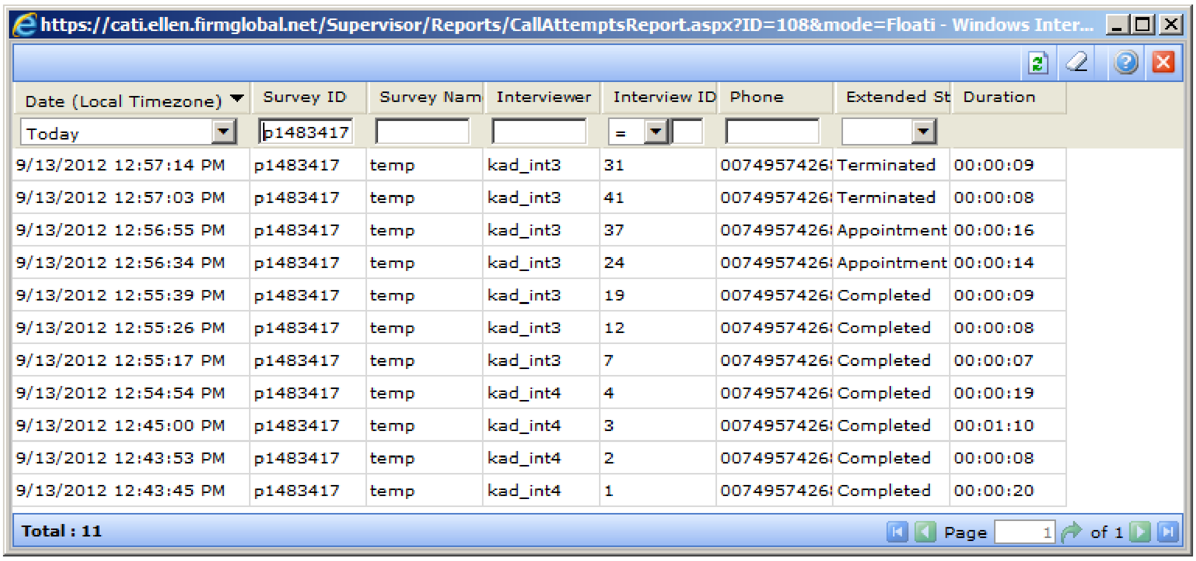


Figure 287 Call Attempts report displayed in the separate window when generated from the All Surveys list

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.

8.9 Viewing the Interviewer Submission Details Log

The Interviewer Submission Details Log lists all CATI interviewer alerts that have been raised based on the "Last Submission Alert" and "Quick answer submission Alert (for alert report)", both warning and red alert thresholds.

The purpose of this log is to track alerts that have been raised by interviewers who are either speeding through the survey or spending large amounts of time on certain questions.

The toolbar allows for filtering on the survey(s) and interviewer(s) that are to be viewed and the searchable headers allow filtering of the list created.

The Interviewer Submission Details Log contains the following data displayed in columns:

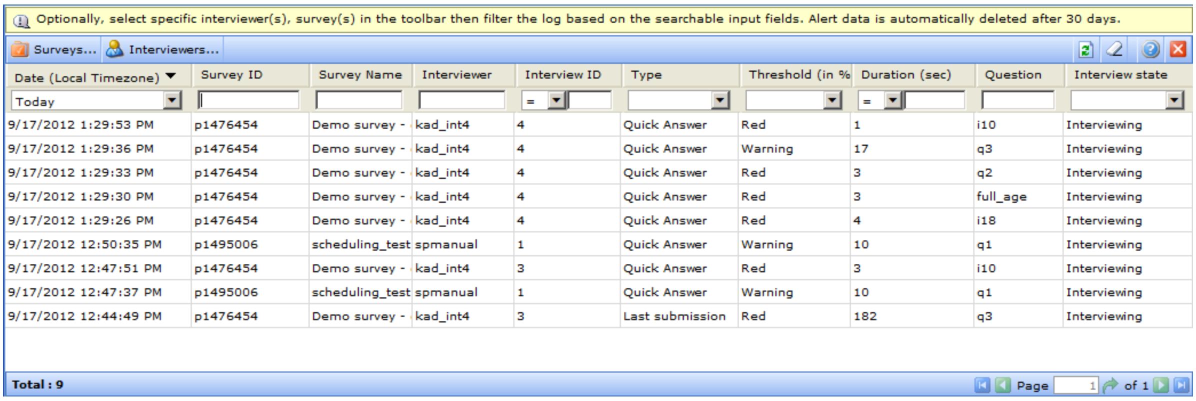
- Date (local timezone) - the date when the alert was raised (in the local timezone),
- Survey ID,
- Survey Name,
- Interviewer - interviewer name,
- Interview ID,
- Type - type of the alert raised (either Last Submission, or Quick answer),
- Threshold - the threshold type that was reached (or exceeded),
- Duration - how long had it took for the interviewer to submit the answer (shown in seconds),
- Question,
- Interview state - what state the interview had been in when the alert was raised (either Interviewing or Openend reviewing).

This data is captured ONLY if the alerts are set. If no alerts are set, no data is captured. If alert thresholds are changed the historic alert data is not retrospectively changed. Alert data is deleted after a system configured number of days (30 days by default).

To view Interviewer Submission Details log for all surveys:

1. Choose 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 288 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 reveal the Survey Search form. This will allow to specify particular surveys for which the log will display information.

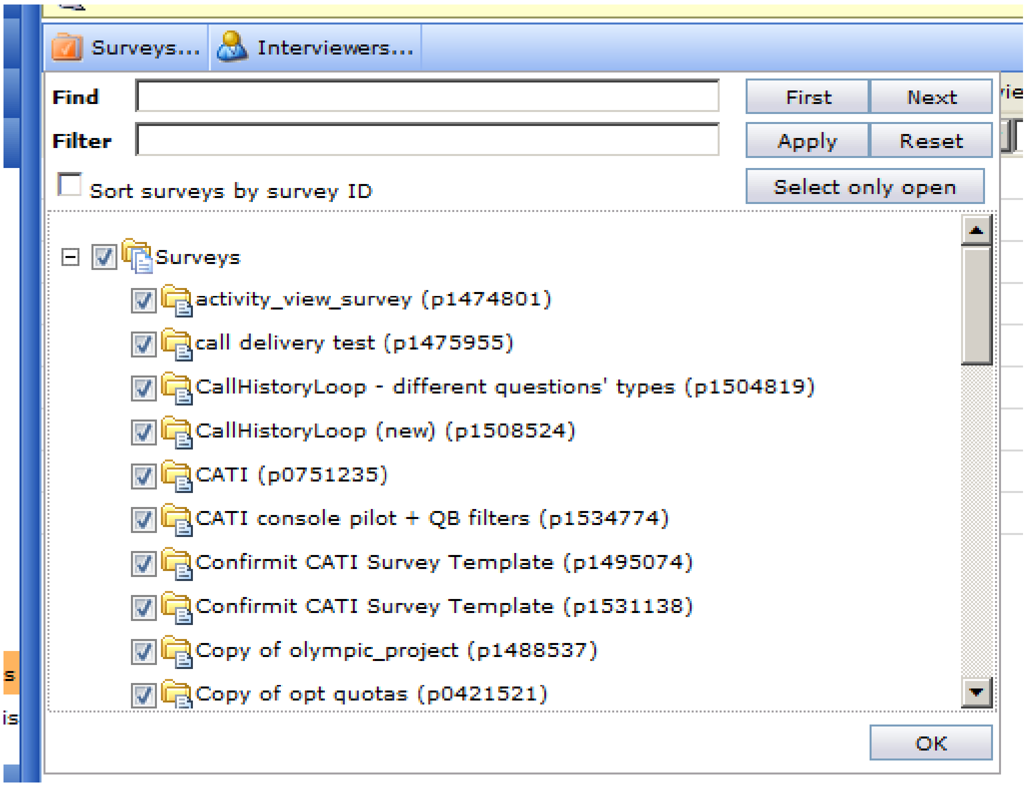


Figure 289 The Survey Search form displayed for the Interviewer Submission Details Log

To generate the log for particular interviewers press the Interviewers button 

in the upper left corner of the frame to reveal the Interviewer Search form. This will allow to specify particular interviewers and interviewer groups for which the log will display information.

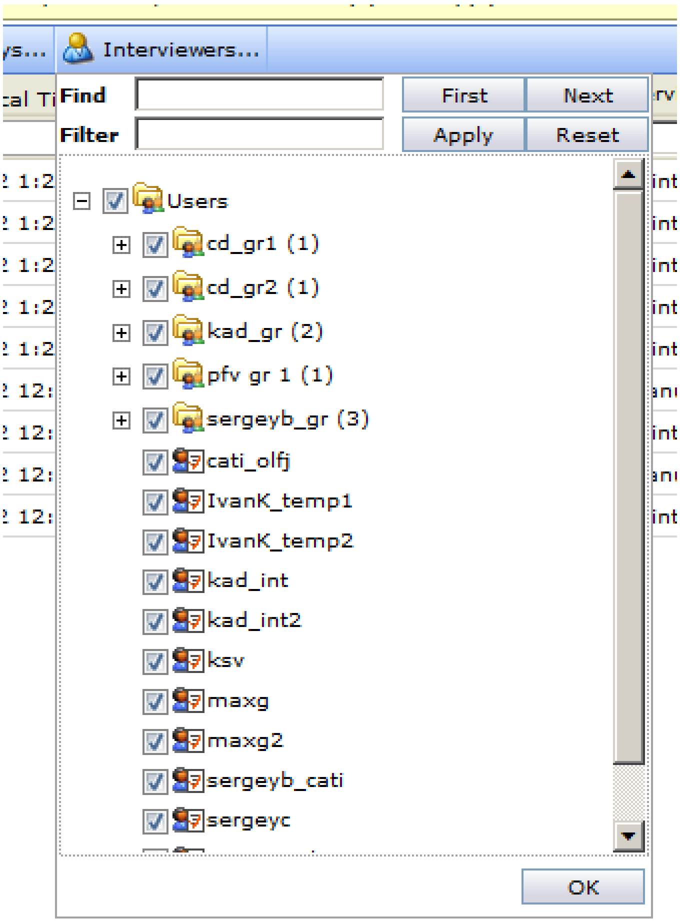


Figure 290 The Interviewer Search form displayed for the Interviewer Submission Details Log

Please refer to Selecting surveys to display in the grid in the Survey List window on page 201 for description of the Surveys Search form. The Interviewer Search form assumes using the same technique as it is used with the Surveys Search form.

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.

8.10 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 281 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.

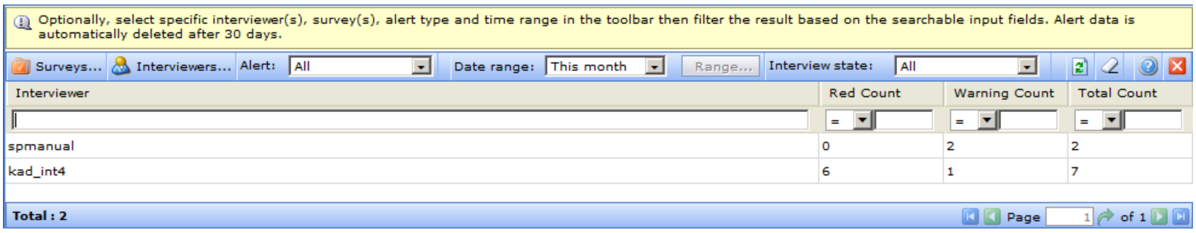
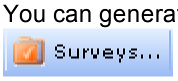


Figure 291 Viewing the Aggregated Interviewer Submission Report

3. You can generate the report for particular surveys, or interviewers. Press the Surveys button  in the upper left corner of the frame to reveal the Survey Search form.

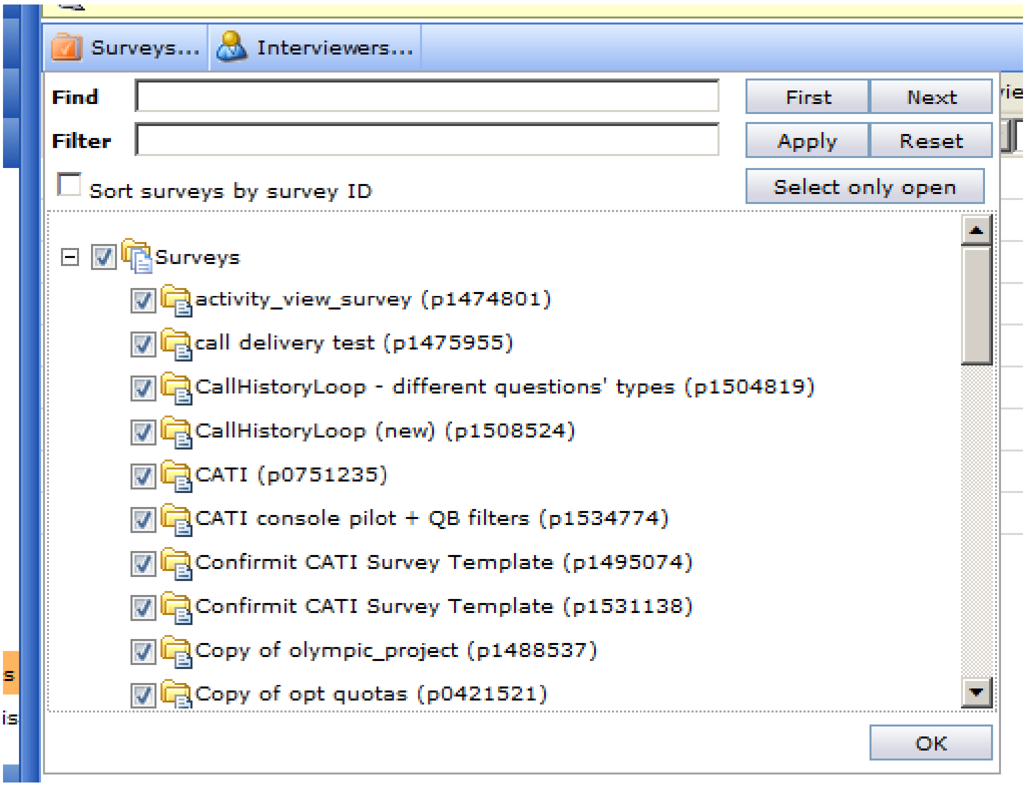


Figure 292 The Survey Search form displayed for the Aggregated Interviewer Submission Report

To generate the log for particular interviewers press the Interviewers button 

in the upper left corner of the frame to reveal the Interviewer Search form.

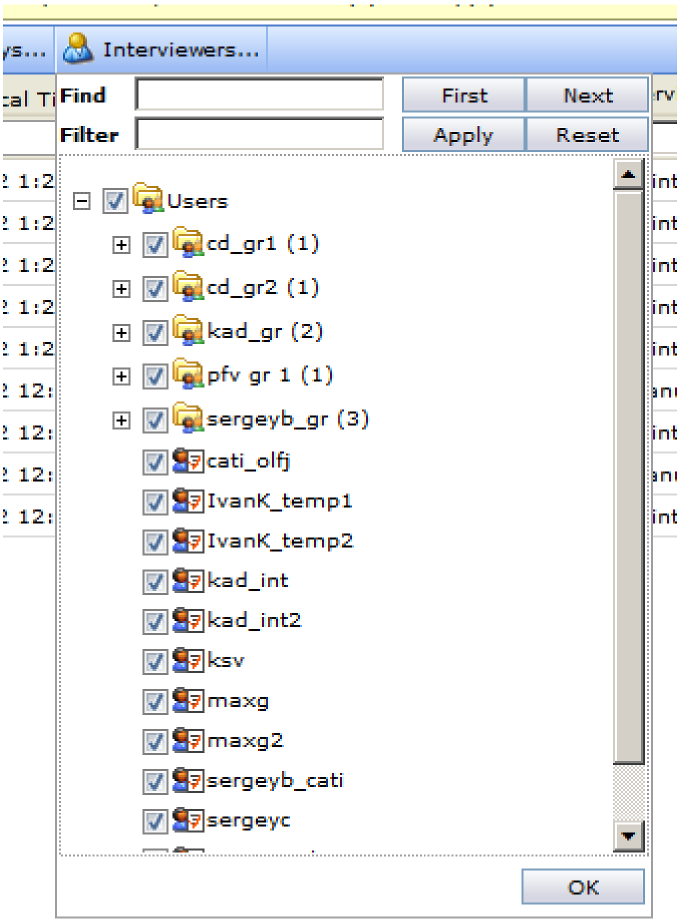


Figure 293 The Interviewer Search form displayed for the Aggregated Interviewer Submission Report

Please refer to Selecting surveys to display in the grid in the Survey List window on page 201 for description of the Surveys Search form. The Interviewer Search form assumes using the same technique as it is used with the Surveys Search form.

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 259 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.

8.11 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 press the Export button  located above the report header. This will display the Export dialog window.

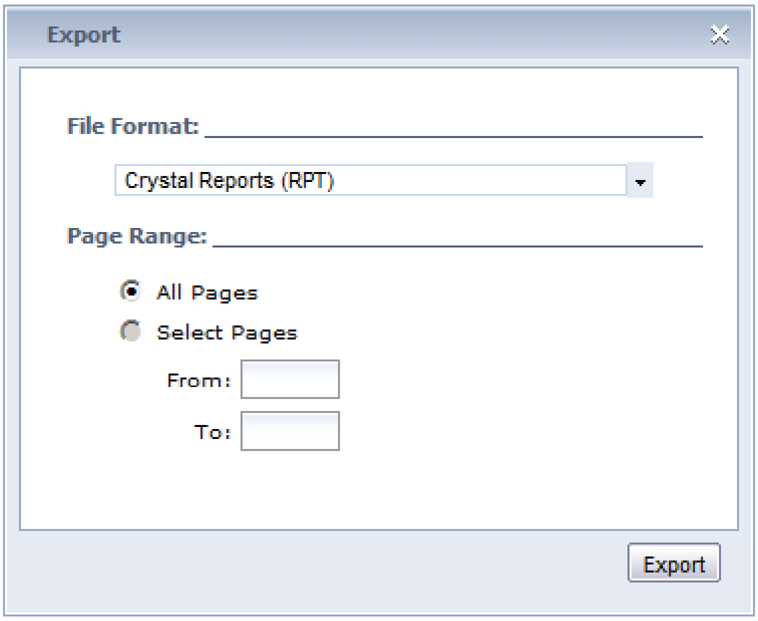


Figure 294 Export the Report dialog window

This dialog window allows setting up options required to export the generated report.

2. From the File Format drop-down list select the format of the file to which the report would be saved.

The following formats are available:

- Crystal reports (file with RPT extension)
- PDF format;
- MS Excel 97-2003;
- MS Excel 97-2000 (data only);
- MS Excel Workbook (data only);
- MS Word 97-2003;
- MS Word 97-2003 (editable);
- Rich Text Format (file with RTF extension);
- Character Separated Values (file with CSV extension);
- XML.

3. Choose whether you want to export the whole report (by selecting the All Pages option), or Select Pages (by entering the page range to be included in the exported report in the From and To fields).

4. Press Export to start the export procedure. This will display the standard MS Internet Explorer dialog box 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 box will be displayed, and you will have to enter the name and path to the file you want to save.

8.12 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 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.

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. 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.

9 Appendix A - Action parameter descriptions

Below is the list of the action parameter descriptions.

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	number, Person ID or Group ID, -1, -2, -3	Enter Interviewer ID or Group ID, -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.	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
Place call history bookmark	number, min=0	Enter a new history bookmark value	Places a new call history bookmark in the call history list.	Updates the call properties
Place call history bookmark to NOW	n/a		Places a new call history bookmark in the call history list.	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

10 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.

11 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 CATI Interviewer Console on page 181 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 186 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

12 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 were 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.

13 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

14 Appendix F - The list of the predefined Extended Statuses

Below is the list of the predefined Extended Status names, codes, and descriptions.

Cod-e	Extended Status name	Description
1	Appointment	Interview abandoned with an appointment time captured to call the respondent back
2	Busy	Respondent already on a call
3	No reply	Respondent not answering
4	Quota failure	Quota target for the respondent already fulfilled
5	Refusal	Respondent refused to be interviewed
6	Terminated	Call abandoned
7	Answer phone	Call answered by answer phone (voicemail)
8	Modem	Call to modem number
9	Fax	Call to fax number
10	Congestion	Call reported congestion on the line (telephony specific)
11	Unobtainable	Invalid number
12	Nuisance	Respondent hung up call before being delivered to the interviewer
13	Completed	Interview completed
14	Screened	Respondent screened out by interview condition(s)
15	Returned not dialed	The call was returned from the dialer without having a dial attempt (predictive dialing mode specific)
16	Fresh sample	Respondent contact awaiting interview
17	Blacklist	Respondent's number is on the telephone blacklist
18	Not automatically dialed	Manually dialed call.
19	Status not sensed	Automatic dialer unable to identify call type
20	Transfer to Web	Respondent assigned for Web interview
21	Transfer to CATI	Respondent assigned for Computer Assisted Telephone Interview
22	Transfer to CAPI	Respondent assigned to Computer Assisted Personal Interview
23	Transfer to IVR	Respondent assigned to Interactive Voice Response system
24	Interrupted by interviewer	The call was aborted by the interviewer.
25	Returned dialer expired	Call was returned from the dialer due to its dialer call expiration time being reached (predictive dialing mode specific)
26	Interrupted by system	Call was interrupted by the system
27	Filtered by call delivery	Call was removed from the call queue due to its quota being full
28	Stopped	Call was stopped by the dialer (telephony specific)
29	Telephony failure	Technical fault with telephone system, unable to contact respondent
30	Error	Fault occurred during call

15 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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