



# CATI Multimode Installation Guide

This is revision 2 of the Forsta Plus v2021 CATI Multimode Installation Guide published in December 2021. The information herein describes Forsta Plus CATI Multimode and its features as of Build nr. 2021.12.68. New features may be introduced into the product after this date. Go to [www.confirmit.com](http://www.confirmit.com) or check “News” on the Customer Extranet for the latest updates.

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

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## What's New in this Revision?

**Note: Only the latest changes to this documentation are listed here. Changes made to earlier revisions are listed in the "Changes to the User Documentation" document which can be downloaded from the Forsta extranet at <https://extranet.confirmit.com>.**

The following changes have been made in this revision:

- The manual is updated with new logo, company and product names. Note that images will be updated at a later date, and URLs, folder names etc. will be corrected as the changes become applicable.
- Content that is no longer relevant is removed.

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

### **Important**

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

# 1. Building a Multimode Site

The following topics take you through the site-building requirements and procedure.

## 1.1. Server Hardware

The minimum requirements are listed below. These should be exceeded considerably to allow satisfactory system performance.

- Dual CPU
- Minimum 4 GB RAM
- Installation requires approximately 500MB for the CATI Supervisor software; this estimate includes space required to deploy the backend part of the software. Available disk space should be significantly larger on a PC which hosts CATI databases. Database size will depend on usage volume; it may exceed 1 TB. We suggest using a scalable hardware solution, where you can upgrade the system by attaching additional storage capacity.

## 1.2. Prerequisites for Multimode Servers

Please refer to the Forsta Plus Server Manual.

## 1.3. SQL Prerequisites

Forsta recommends that the CATI Multimode system is run on a separate SQL Instance from that running the Forsta Plus SQL databases.

Note that the CATI system productivity will be improved if these separate SQL instances are installed on different PCs.

### 1.3.1. SQL Server where Multimode Databases are to Reside

If the Forsta and Multimode databases are to reside on different SQL servers, protocols must be enabled on both SQL servers (at least Pipes and TCP/IP). To do this, go to:

**Microsoft SQL Server 2012 > Configuration Tools > SQL Server Configuration Manager > SQL Server Network Configuration > Protocols for MSSQLSERVER**

### 1.3.2. Linked Servers

CATI Multimode relies on Linked Server to access, attach and use survey databases. The linked servers used by CATI Multimode must be created prior to the installation start.

#### **Important**

**A Linked Server entry must exist for all SQL instances used with Forsta Plus.**

Two scripts must be run to create linked servers; one script must be run on the Forsta Plus SQL instance to establish a link with the Multimode SQL instance, and another must be run on the Multimode SQL instance to establish a link with the Forsta Plus SQL instance. The image below shows an example of the PowerShell script that must be run on the Forsta Plus SQL instance.

In the script, replace <Multimode SQL Instance> with the Multimode SQL Server name, then run this script on all Forsta Plus SQL Instances.

In the event SQL 2012 server version is used, the following server option must have the following value: @provider=N'SQLNCLI11'. All server options shown in the script example must retain their default values except for the 'rpc' and 'rpc out' options - these must be set to "true".

```

USE [master]
GO

/***** object: LinkedServer [FusionLinkedServer]    Script Date: 23.03.2015 13:37:10
*****/
EXEC master.dbo.sp_addlinkedserver @server = N'FusionLinkedServer', @srvproduct=N' ',
@provider=N'SQLNCLI11', @datasrc=N'[Multimode SQL Instance]'
/* For security reasons the linked server remote logins password is changed with
***** */
EXEC master.dbo.sp_addlinkedsrvlogin
@rmtsrvname=N'FusionLinkedServer',@useself=N'True',@locallogin=NULL,@rmtuser=NULL,@rmt
password=NULL

GO

EXEC master.dbo.sp_serveroption @server=N'FusionLinkedServer', @optname=N'collation
compatible', @optvalue=N'false'
GO

EXEC master.dbo.sp_serveroption @server=N'FusionLinkedServer', @optname=N'data
access', @optvalue=N'true'
GO

EXEC master.dbo.sp_serveroption @server=N'FusionLinkedServer', @optname=N'dist',
@optvalue=N'false'
GO

EXEC master.dbo.sp_serveroption @server=N'FusionLinkedServer', @optname=N'pub',
@optvalue=N'false'
GO

EXEC master.dbo.sp_serveroption @server=N'FusionLinkedServer', @optname=N'rpc',
@optvalue=N'true'
GO

EXEC master.dbo.sp_serveroption @server=N'FusionLinkedServer', @optname=N'rpc out',
@optvalue=N'true'
GO

EXEC master.dbo.sp_serveroption @server=N'FusionLinkedServer', @optname=N'sub',
@optvalue=N'false'
GO

EXEC master.dbo.sp_serveroption @server=N'FusionLinkedServer', @optname=N'connect
timeout', @optvalue=N'0'
GO

EXEC master.dbo.sp_serveroption @server=N'FusionLinkedServer', @optname=N'collation
name', @optvalue=NULL
GO

EXEC master.dbo.sp_serveroption @server=N'FusionLinkedServer', @optname=N'lazy schema
validation', @optvalue=N'false'
GO

EXEC master.dbo.sp_serveroption @server=N'FusionLinkedServer', @optname=N'query
timeout', @optvalue=N'0'
GO

EXEC master.dbo.sp_serveroption @server=N'FusionLinkedServer', @optname=N'use remote
collation', @optvalue=N'true'
GO

```

*Figure 1 Creating a linked server on the Forsta Plus SQL instance*

The image below shows an example of the PowerShell script that must be run on the CATI Multimode SQL instance. In the script replace <Confirmit SQL Instance> with the Forsta Plus SQL Server name, then run the script on all CATI Multimode SQL instances.

In the event the SQL 2012 server version is used, the server option must have the following value: @provider=N'SQLNCLI11'. All server options shown in the script example should retain their default values except for the 'rpc' and 'rpc out' options - these should be set to "true".

```

USE [master]
GO

/***** Object: LinkedServer [ConfirmitLinkedServer]    Script Date: 23.03.2015 13:37:10
*****/
EXEC master.dbo.sp_addlinkedserver @server = N'ConfirmitLinkedServer', @srvproduct=N' ',
@provider=N'SQLNCLI11', @datasrc=N'[Confirmit SQL Instance]'
/* For security reasons the linked server remote logins password is changed with *****/
*/
EXEC master.dbo.sp_addlinkedsrvlogin
@rmtsrvname=N'ConfirmitLinkedServer',@useself=N'false',@locallogin=NULL,@rmtuser=NULL,@rmt
password=NULL
GO

EXEC master.dbo.sp_serveroption @server=N'ConfirmitLinkedServer', @optname=N'collation
compatible', @optvalue=N'false'
GO

EXEC master.dbo.sp_serveroption @server=N'ConfirmitLinkedServer', @optname=N'data access',
@optvalue=N'true'
GO

EXEC master.dbo.sp_serveroption @server=N'ConfirmitLinkedServer', @optname=N'dist',
@optvalue=N'false'
GO

EXEC master.dbo.sp_serveroption @server=N'ConfirmitLinkedServer', @optname=N'pub',
@optvalue=N'false'
GO

EXEC master.dbo.sp_serveroption @server=N'ConfirmitLinkedServer', @optname=N'rpc',
@optvalue=N'true'
GO

EXEC master.dbo.sp_serveroption @server=N'ConfirmitLinkedServer', @optname=N'rpc out',
@optvalue=N'true'
GO

EXEC master.dbo.sp_serveroption @server=N'ConfirmitLinkedServer', @optname=N'sub',
@optvalue=N'false'
GO

EXEC master.dbo.sp_serveroption @server=N'ConfirmitLinkedServer', @optname=N'connect
timeout', @optvalue=N'0'
GO

EXEC master.dbo.sp_serveroption @server=N'ConfirmitLinkedServer', @optname=N'collation
name', @optvalue=NULL
GO

EXEC master.dbo.sp_serveroption @server=N'ConfirmitLinkedServer', @optname=N'lazy schema
validation', @optvalue=N'false'
GO

EXEC master.dbo.sp_serveroption @server=N'ConfirmitLinkedServer', @optname=N'query
timeout', @optvalue=N'0'
GO

EXEC master.dbo.sp_serveroption @server=N'ConfirmitLinkedServer', @optname=N'use remote
collation', @optvalue=N'true'
GO

```

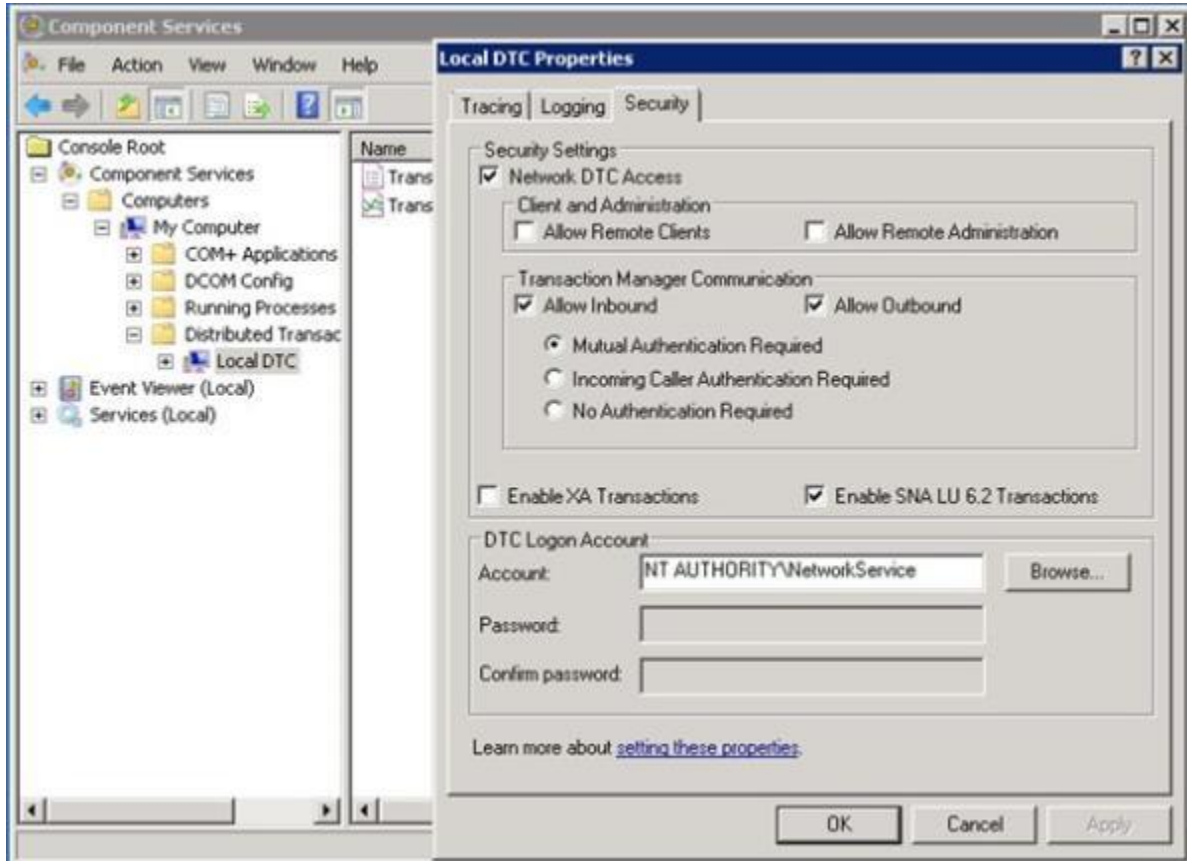
*Figure 2 Creating a linked server on the Multimode SQL instance*

### 1.3.3. SQL DTC Configuration

On all SQL servers where Forsta and Multimode instances reside, and on all CATI servers, ensure that the following properties are set:

- Enable Network DTC Access (check the corresponding box).
- Enable Allow Outbound (check the corresponding box).
- Enable Allow Inbound (check the corresponding box).
- Choose the Mutual Authentication Required option below.

- Check that the Enable SNA LU 6.2 Transactions option is marked.



**Figure 3 The Local DTC Properties dialog**

These are the recommended DTC Settings on a Standalone SQL Server Setup. The same settings apply in a clustered environment.

## 1.4. Dialer System Requirements

If your company plans to use a Dialer as part of your CATI activities via the Forsta Software, a number of additional system requirements will apply. Full system requirements are found in the Forsta Plus Local Dialer System Requirements document, available on the Forsta site, and on the Forsta Extranet.

Note that a separate dedicated Web Service server, acting as a proxy between Forsta CATI and the dialer service, is required when using a dialer.

The following bandwidth requirements for Dialer service hosting are applied:

- A persistent connection to the Forsta platform is required;
- Interviewing involves data exchange on a page-by-page basis.
- Connection reliability is essential;
  - o Low latency and high quality of service
- Recommended line types:
  - o Leased line.
  - o Fiber.

- Minimum recommended connection bandwidth is 2 Mbps.

The CATI Solutions Team can provide more details about bandwidth requirements and configurations.

## 2. The Octopus-Aided Setup Procedure

The following topics describe the setup procedure using Octopus.

### 2.1. Understanding the Octopus-Aided CATI Multimode Setup Process

The CATI Multimode system is set up with the use of the convenient and reliable release management software system called the Octopus Deploy server.

The current manual only deals with procedures that are performed in the course of the CATI Multimode system deployment. It merely lists the parameters required to install the CATI Multimode system correctly on the specified machines. This User Guide is not meant to explain how the Octopus Server should be installed, prepared or configured to perform the CATI Multimode deployment. Please refer to the Octopus Deploy software documentation for any question concerning Octopus software installation, configuration and functions.

The Octopus Deploy Server is a friendly deployment and release management automation system. Use of the Octopus Deploy server helps to facilitate the deployment process. A flawless and trouble free deployment and update routine is created by saving and reusing the deployment configurations, steps and environments to which the Forsta software is deployed.

#### **Important**

**Normally the CATI Multimode system deployment procedure does not require any changes in setup configuration - merely follow the prompts that appear in the course of the installation. The complete instruction can be found in (go to CATI On-Premise Deployment Procedure on page 12 for more information). Proceed directly to this section if you do not intend to make changes to the Octopus Deploy Server account.**

Any necessary updates of the Forsta software are also performed using the Octopus Deploy software. As a rule, any update is performed quickly and without problems using templates. The person initiating the update procedure must only select from a number of preset configurations and start the process; the rest happens automatically.

Note that any new CATI Multimode version is installed into a separate, freshly created folder; this is true for all machines included in the chosen environment. When deployment is successfully completed, the newly created folders containing the latest CATI Multimode version are specified as the working folders. No folders containing previous CATI Multimode versions are deleted, although they are no longer used.

### 2.2. General Procedures Required to Configure the CATI Multimode Setup

The deployment process performed with the help of the Octopus Server involves a number of "stages" which are configured separately.

Usually you will be provided with access to a previously-configured Octopus Deploy Server account, although you may need to reconfigure some of the settings. The following descriptions will point you to the correct deployment parameter.

#### **Important**

**If you have been provided with access to a configured Octopus Deploy Server account, you can start to deploy the software (go to CATI On-Premise Deployment Procedure on page 12 for more information). The instructions provided in that section are all that you need to complete the CATI Multimode software installation.**

#### **Important**

**Do not alter any Octopus account settings unless you are fully aware of the consequences. You will not normally need to change any setting except for in cases described in Step 6 of the procedure (adding new roles + adding new tentacles) (go to CATI On-Premise Deployment Procedure on page 12 for more information).**

The instructions provided below help you understand the main steps required to configure the Octopus Deploy Server account.

If you must manually change any settings in the Octopus Deploy Server account configuration, follow the instructions below.

We strongly encourage reading the Octopus Deploy Server documentation prior to performing any operation that is described in the present section. You should make yourself familiar with the Octopus software GUI before you perform any operation with its help. Current manual does not provide any instructions on how to work with the Octopus Deploy GUI: you have to study and understand the corresponding software instructions before you begin.

In general the Octopus account configuration routine is.

1. Compose the "Environment" by adding different local and remote servers to the list on the Environment tab. The CATI Multimode system will be installed on these added machines. You should choose and assign a "Role" to each of the added machines: different CATI Multimode components will be installed on each of the listed machines according to the selected "role". Available roles are: the CATI Backend server, the CATI Supervisor server, the CATI Interviewer Console, the CATI Monitoring Console, the Dialer Web Service.

Whenever you need to add, or exclude a machine from the environment, or change a role of any machine in the environment, you should do so on the Environment tab.

2. Specify the deployment "Process" by adding and configuring consequent "Steps" on the Process tab. Each step can include an action (or a number of actions): running a PowerShell script or deploying a NuGet Package (or any other required action). Once you create and configure a Process (along with all its Steps) it can be saved and reused, or edited before it is used.

Note that the Step that specifies running of the PowerShell script should be performed first. All other Steps should follow it.

Whenever you need to change the order in which the setup actions are performed, or add, or exclude a step, you should do so on the Process tab.

Whenever you need to write or edit a script that should be used on some step of the setup procedure you should do so on the Process tab by adding or editing a Step. Mind that you cannot extract and edit PowerShell scripts from a NuGet package in the same way.

Each NuGet package can include components pertaining to a server which should play one of the assigned "Roles". NuGet packages are composed beforehand and can include different components required to run the software as well as a set of PowerShell scripts needed to deploy and configure these components.

NuGet packages are shipped by Forsta along with the PowerShell script and should be uploaded to Octopus Deploy Server prior to creating Steps that involve deployment of these packages. NuGet packages can be uploaded through the "Library" page.

3. PowerShell scripts included in the NuGet packages contain a number of variables which are used as deployment configuration parameters. Such variables are listed on the "Variables" tab. These variables are utilized at the moment when NuGet packages are being deployed. The "Variables" tab also contains a short description of each variable which helps in understanding its purpose and possible values (please refer to List of Variables used in the PowerShell scripts on the facing page for the complete list of variables). Variables from this list can have similar names but can be used for different "Scopes" (for example, one can be used simultaneously for deployment of the CATI Dialer Web Service, and of the CATI backend server). You can change the Scope for any variable by assigning it to a different Environment, or Role, or Step (mind the variable name - it should not be similar for variables with similar Scopes).

Whenever you need to change the deployment parameters of any CATI Multimode component it should be done by altering the corresponding variable value on the Variables tab. The Scope can also be edited on the Variables tab.

4. Each separate set of NuGet packages forms a "Release". You can save all your current updates (updates that were introduced during the current session) on this tab. Usually the list of saved items includes:
  - the list of NuGet packages which you have included in this release;
  - the current state of Processes;
  - the current state of variables.

Note that if any changes are introduced to the variables after the Release is saved, the variable list should be updated on the "Releases" tab.

Each Release is assigned a specific number which you compose yourself. You can apply any existing Release to a different environment using a different deployment pattern: choose another Environment, or change the current one, choose from the existing Processes or edit any Process Step before you apply the Process.

All information regarding all the releases that have been deployed can be found on the Releases tab. You can also start deployment of any release on the Releases tab.

## 2.3. List of Variables used in the PowerShell scripts

Name of Parameter	Used in Roles			Possible values	Description
	Backend	Super-visor	Consoles		
Cati.Database.ServerName	X	X	X		Name of the SQL server containing CATI databases.
Cati.Database.UseSimpleRecoveryMode	X			True/False	Use 'simple' or 'full' mode for new CATI databases.
Cati.Database.Server.DataPath	X				Local path where mdf files of CATI databases will be stored.
Cati.Database.Server.LogPath	X				Local path where ldf files of CATI databases will be stored.
Cati.Parameters.ValidWCFIpAddresses	X			IP addresses separated by semicolon	Valid IP address list for WCF (all IPs are used in CATI system).
Cati.Parameters.NotificationEmailBcc	X				Notification email BCC. Used to get email about errors in CATI system.
Cati.LoadBalancer.UseLoadBalancer	X			True/False	Will load balancer be used in CATI system or not.

Cati.LoadBalancer.UseNonDisruptiveUpdateMode	X			True/False	Type of installation - non-disruptive or disruptive.
Cati.LoadBalancer.IsAlivePageUrl	X				URL path to IsAlive.htm file.
Cati.LoadBalancer.IsAlivePageRenameTimeout	X			Number	Timeout after renaming the sAlive.htm file.
Cati.SSL.GenerateTestCertificate	X			True/False	Generate a test certificate or use a real one. Makes sense if load balancer isn't used.
Cati.SSL.TestCertificateName	X				Certificate name of generated certificate. Makes sense if test certificate will be generated.
Cati.SSL.CertificatePath	X				Path to a certificate file. Makes sense if a test certificate will not be generated.
Cati.SSL.CertificatePassword	X				Password for a certificate. Make sense if a test certificate will not be generated.
Cati.SessionState.Mode		X		SQLServer- /InProc/Redis	Session state mode.

Cati.SessionState.Database.ServerName		X			Name of the SQL Server containing ASPState database. Makes sense if session state mode is set to "SQLServer".
Cati.SessionState.Database.UserName		X			Name of the user account on the SQL server used to connect to SQL server with ASPState database. Makes sense if the mode is set to "SQLServer".
Cati.SessionState.Database.Password		X			Password to the user account on the SQL server used to connect to SQL server with ASPState database. Makes sense if the mode is set to "SQLServer".
Cati.SessionState.Redis.HostName		X			Name of the server containing the redis service. Makes sense if the mode is set to "Redis".
Cati.SessionState.CookieName		X			Session state cookie name.

Cati.Parameters.IsEventlogLoggingEnabled	X	X		True/False	Can be used for testing the system (DO NOT use for production).
Cati.Console.Parameters.InterviewerVirtualDirectoryName			X		Virtual directory name for Interviewer Console (slashes allowed).
Cati.Console.Parameters.MonitoringVirtualDirectoryName			X		Virtual directory name for Monitoring Console (slashes allowed).
Cati.Console.Parameters.DeploymentServerName			X		Deployment server name.
Cati.Console.Parameters.CatiServerName			X		Cati server name (or load balancer name).
Cati.Console.Parameters.InstallConfirmitBrandedPage			X	True/False	True - will install files for the Forsta Plus default page. False (the page does not exist) will install regular publish.html page.
Cati.Console.Certificate.Path			X		Path to the certificate file. Any certificate type will do. Must be valid for code signing.
Cati.Console.Certificate.Password			X		Certificate password. Can be blank.

## 2.4. CATI On-Premise Deployment Procedure

**Important**

Note that the procedure described here applies only to the Continuous Deployment version.

1. Log in to the On-Premise Octopus server with Remote Desktop.
2. Open a PowerShell command prompt as Administrator.

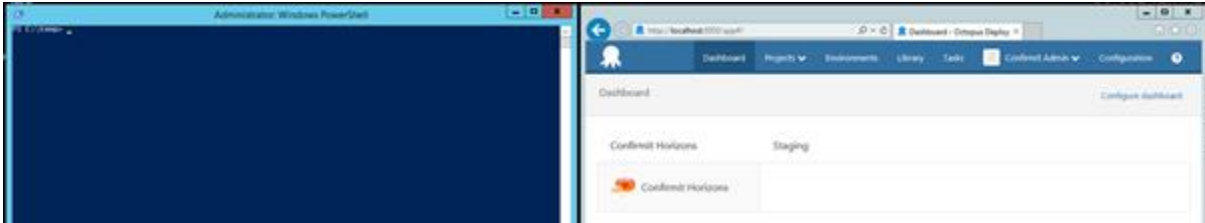


Figure 4 Opening PowerShell as Administrator

3. Type the command to begin the Octopus Installer. In this example we have an Octopus server where a Forsta CD is used.

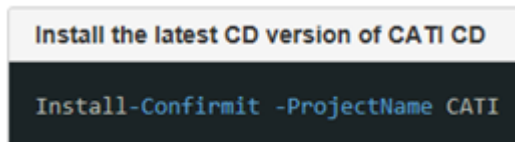


Figure 5 Installing the latest version

Note that the latest CATI version is installed by default. If you want to perform the initial installation using an older version of CATI then you must specify the version number.

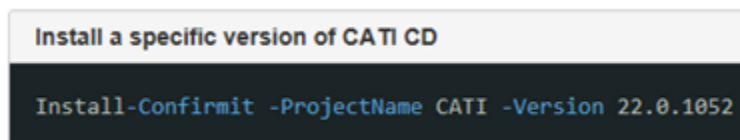


Figure 6 Installing a specific version

The installer dialog opens.

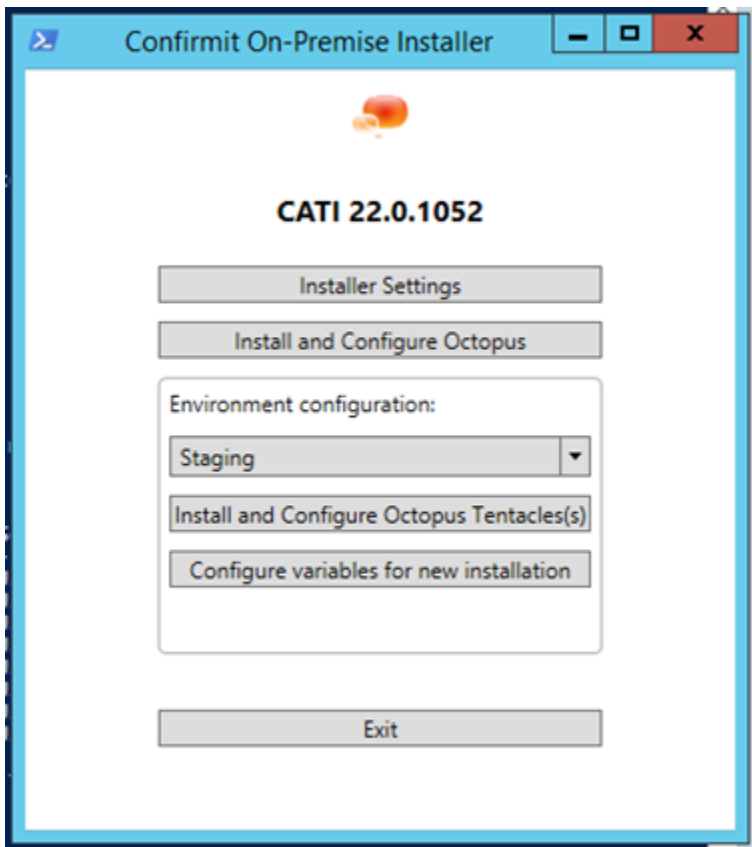


Figure 7 The installer dialog

- 4. Click on **Install and Configure Octopus**.

**Note:** The Installer Settings are shared between all Forsta Plus and application (CATI, AM, Flex) installations and should normally NOT be changed/used.

The installation script completes and you will now see the CATI project in Octopus.

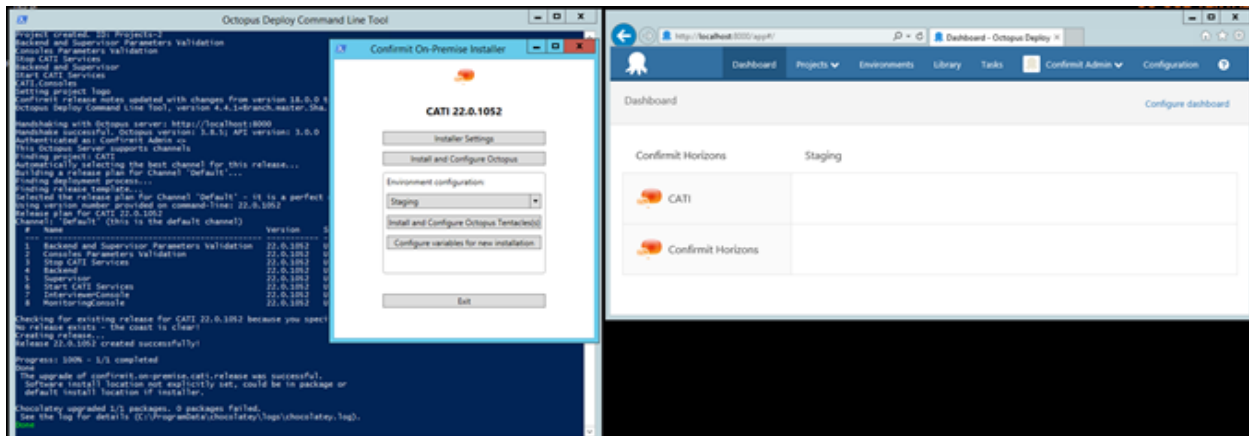
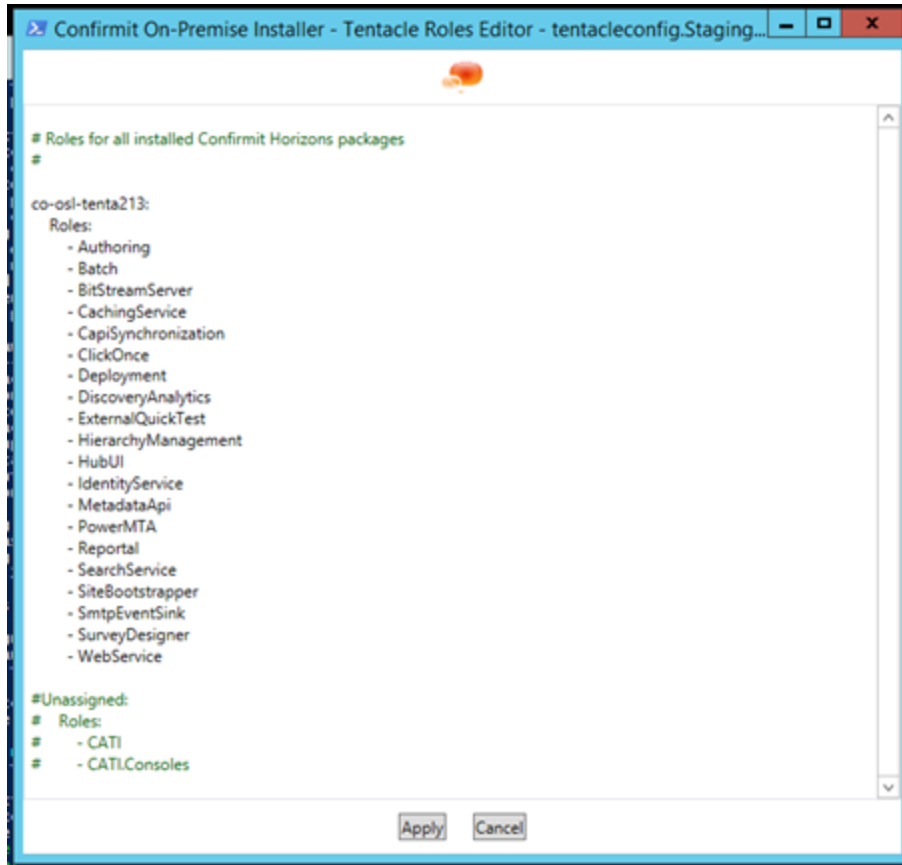


Figure 8 The CATI project in Octopus

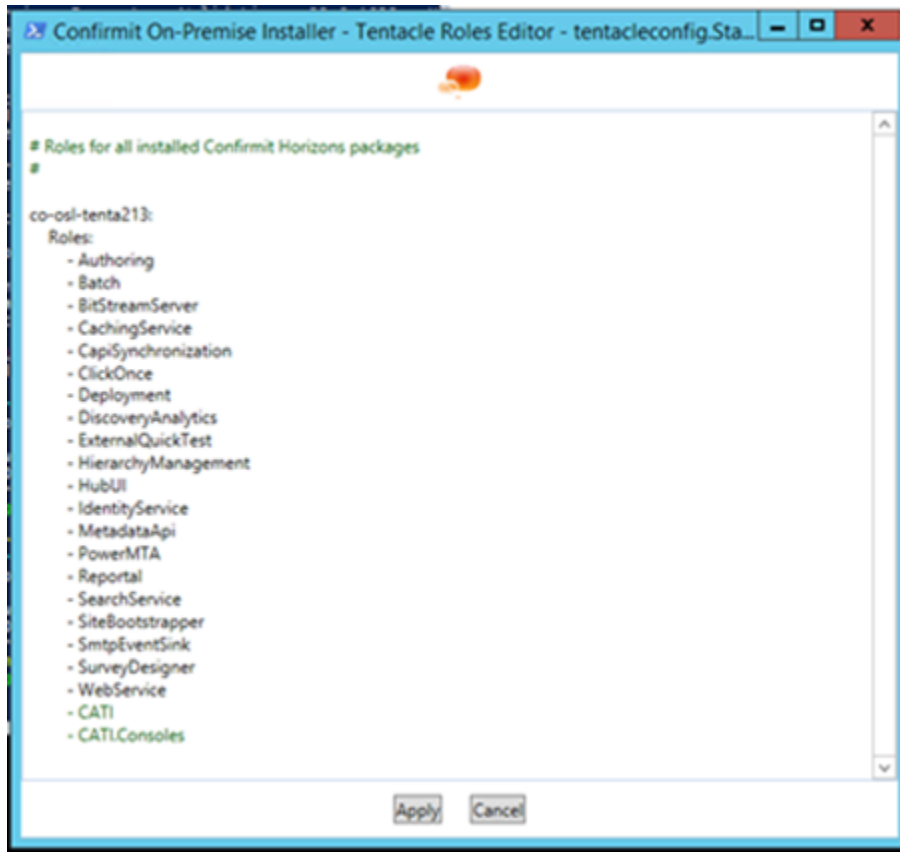
For each of the environments where you want to deploy CATI, the tentacles must be installed and configured, and the Octopus variable set for CATI must be initialized with the correct values.

5. Select the environment in the dropdown.
6. Click **Install and Configure Octopus Tentacle(s)**.



*Figure 9 Configuring the Octopus tentacles*

7. Add the unassigned roles to the existing server or specify a new tentacle.

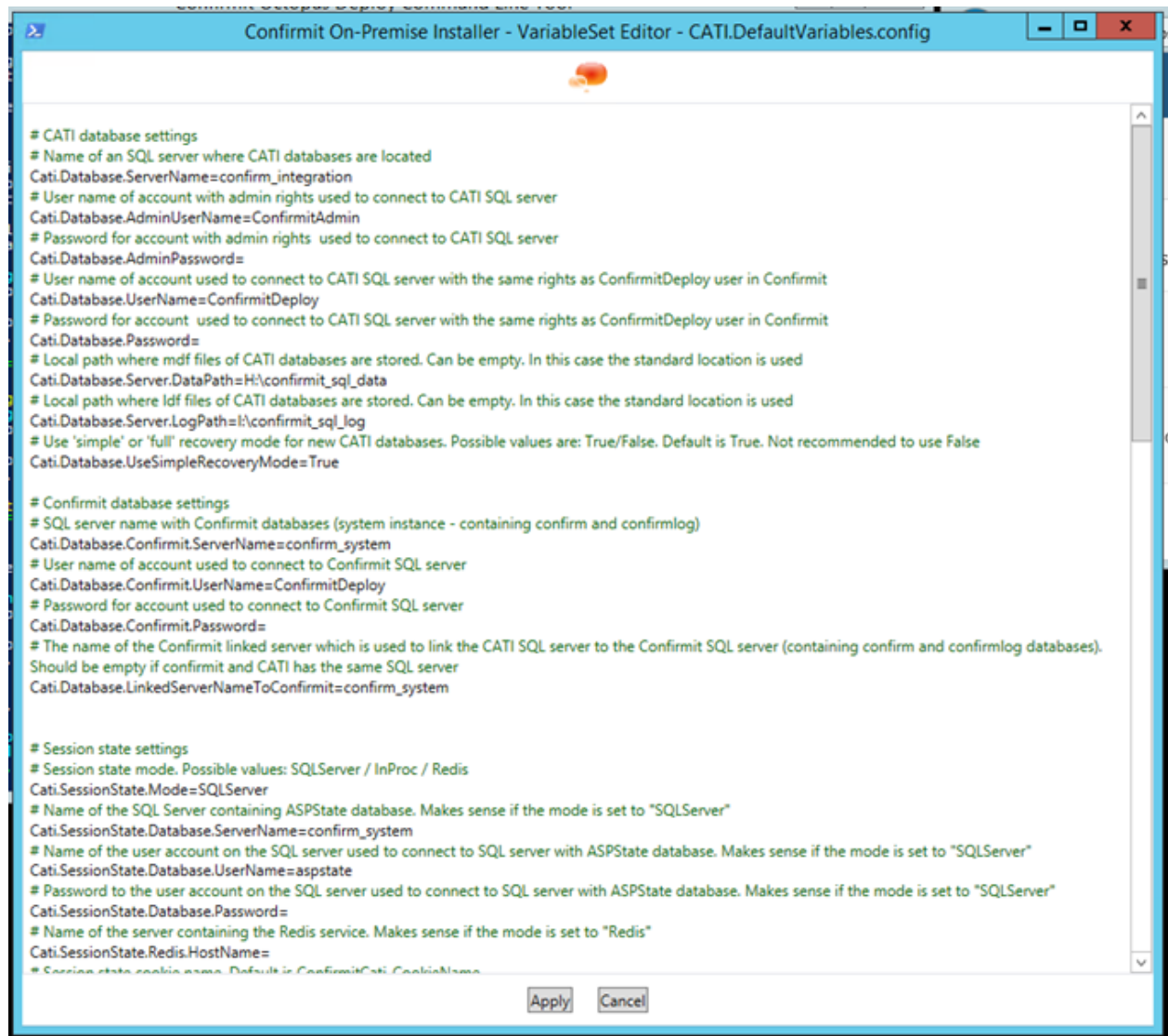


*Figure 10 Configuring the Octopus tentacles*

8. Click **Apply**.

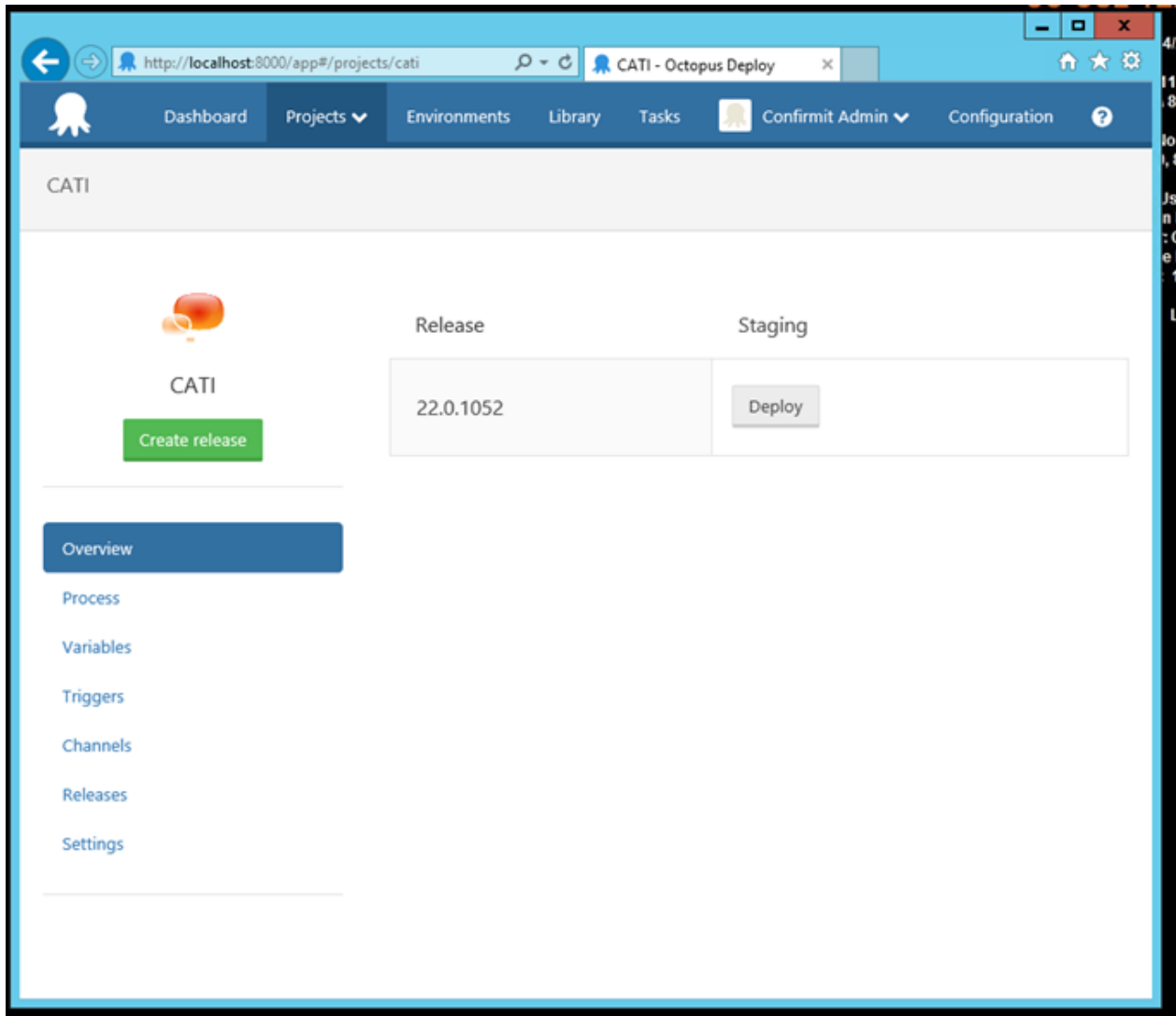
**Note: If you want to delete a tentacle from any machine, just remove it from the environment.**

9. Click **Configure variables for new installation**.



*Figure 11 Configuring the variables*

10. Update the file with correct values for the target environment and click **Apply**.  
The window closes and the Installer window becomes active.
11. Click **Exit** in the Installer window and you are done.



**Figure 12 Installation finished**

The CATI release is now ready for deployment. Any new releases that are published to the On-Premise feed in Artifactory will now automatically be imported into Octopus and will appear in the release list ready for deployment.

## 3. Post-Installation Steps

The following steps are to be conducted after the installation.

### 3.1. Post-Configuration Using Forsta Plus

Set a link from Forsta Authoring to the Multimode component.

1. Open Professional Authoring.
2. In Authoring, go to **Admin > System Configuration > Multimode**.

#### Important

**When enabling Multimode in Forsta Plus Authoring, launch of the Multimode-enabled Surveys will fail if the Company is not Multimode Enabled. Refer to the Serarate Professional Authoring User Guide for instructions on how to manage the Company properties.**

3. In MultimodeBaseURL, enter the URL to the Supervisor application: **http://ServerName/Supervisor**. The default name is Supervisor.Rel unless this is changed during setup.
4. In MultimodeWebServiceURL, enter the URL to the Multimode Server: **http://ServerName/Rel/ManagementMultimodeInstance**.

Use a Fully Qualified Domain name for URLs.

5. On a multi-server site, go to **Security Settings** and check SetConfermitCookieDomain. ensure the ConfermitCookieSuffix is set.

In most cases, EnableMultimodeWebservicesIPLockdown must also be checked for CATI to function correctly.

Multimode	
EnableMultimodeWebservicesIPLockdown	<input checked="" type="checkbox"/>
MultimodeBaseURL	http://CO-OSL-TNME06.firmglobal.com/Supervisor
MultimodeCAPIConsoleDownloadURL	http://localhost/CapiInterviewerConsole/publish.htm
MultimodeCATIConsoleDownloadURL	http://CO-OSL-TNME06.firmglobal.com/CATI/CatiConsole/publish.html
MultimodeCATISupervisorPlayerDownloadURL	http://CO-OSL-TNME06.firmglobal.com/CATI/SupervisorConsole/publish.html
MultimodeWebServiceURL	http://co-osl-tnme06.firmglobal.com/Rel/ManagementMultimodeInstance
ReplicatedVariablesMaxFieldWidthOfOpenText	255
ReplicatedVariablesMaxNumber	20

Figure 13 Examples of the domain names in the System Configuration > Multimode section

### 3.2. Post-Installation Setup

1. Ensure the CATI add-on has been assigned to your company .
2. In the **Company Details > Add-Ons** tab, select CATI to enable the CATI add-on.



*Figure 14 Enabling the CATI add-on - 1*

3. Save the changes.
4. On the Company Details page, click the **Add Instance** button.  
This verifies that a new Service called Confirmit.CATI.Backend.Rel\$[CompanyID], and on the SQL Instance a new database named ConfirmitCATIV15\_[CompanyID], are created.
5. Create a user in the new company (for example Company Admin) with the Normal role, and grant the user the SYSTEM\_CATI\_SUPERVISOR permission.
6. Log in as Company Administrator.

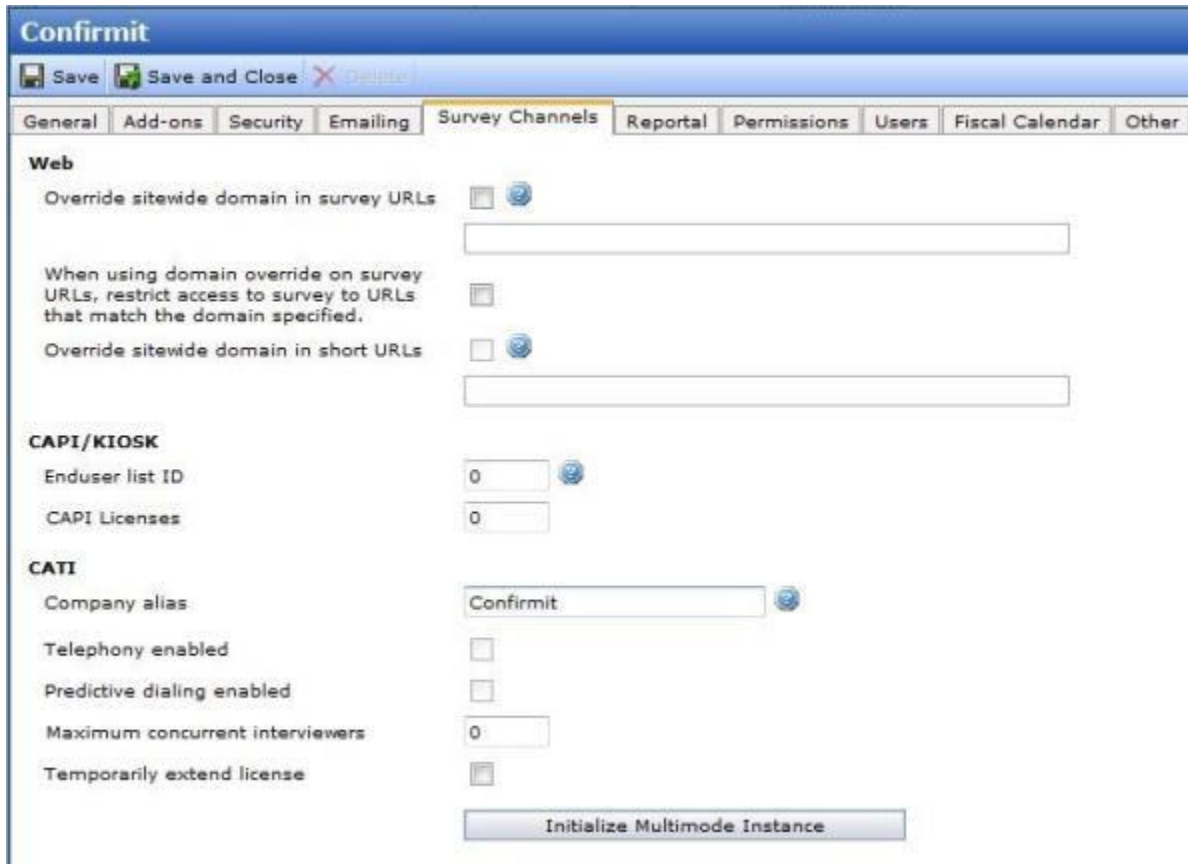


Figure 15 Enabling the CATI add-on - 2

7. In the **Survey Channels** tab, click the Initialize Multimode Instance button to initialize a Multimode instance for the company.

The Multimode instance will initialize.

### 3.3. Caution when Enabling Multimode in Forsta Plus

When entering the MultimodeWebServiceURL and MultimodeBaseURL in Professional Authoring, all Multimode Surveys (CATI and CAPI) will start to use the Multimode components. You must initialize Multimode for all companies that use CAPI, and companies that are going to use CATI.

If you do not initialize Multimode, then CAPI surveys will fail to launch. Note that this will also affect existing surveys. CAPI surveys launched prior to installing Multimode must be re-launched so that databases can be updated.

Data collection for CAPI will NOT stop if this is not done, but the surveys will not log productivity statistics until this is done. It is therefore recommended to initialize the Multimode Component during a maintenance window.

### 3.4. Create a CATI Survey

Refer to the Forsta Professional Authoring User Guide and the Forsta CATI Supervisor manual for information on using the applications.

1. Log into Forsta Authoring.
2. Create a new survey (Optimized DB format).
3. Add a Single question.
4. Launch the survey, ensuring that the 'CATI survey' survey mode is checked.

5. Create a respondent data file (simple file with telephone number as a header and then a list of telephone numbers).
6. Load the respondent data using **Respondent > Upload**.
7. Load the CATI Supervisor.
8. Go to **CATI > Interviewer Management**.
9. Add a new interviewer and ensure that it has a manual task choice.
10. Click on the Surveys tab.
11. Verify the survey appears with the sample loaded (size is given on right). Right-click on the survey and select **Open**.
12. Double-click on the survey.
13. Towards the bottom of the page, go to the Assignment tab and click **Add**.
14. Add your new interviewer.
15. Install the console (go to **CATI > Download CATI Console**).
16. Log in as the interviewer you created in point 9 in this procedure using the appropriate username and password.

Note that "company" is typically the name of your company. This is configured in the **Admin > Accounts > Companies** property tab.

17. Verify that you can log in and perform an interview, and that afterwards the summary tab of the survey in the supervisor has more than just fresh sample (some completes).

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