
# CONFIRMIT CATI SUPERVISOR USER GUIDE

C15 version 2

# Table of Contents

# 1 Getting started with the CATI Supervisor

## 1.1 The CATI Supervisor prerequisites overview

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

**Note: Access to the CATI Supervisor module must be made with an Internet Explorer browser version 6 or higher, other browser types are not currently supported.**

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. In Internet Explorer, click the Tools button, click Pop-up Blocker, and then click Pop-up Blocker Settings.
2. In the Address of website to allow box, type the address (or 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. In case you work in IE version 6, you should disable the usage of HTTP 1.1 protocol. On the Advanced tab. scroll the Settings list until "HTTP 1.1 settings" are reached, and disable both "Use HTTP 1.1" and "Use HTTP 1.1 through proxy connections" options (uncheck the corresponding boxes). Note that such settings affect only the work in IE version 6 - if you work in IE version 7, both options must be enabled (corresponding boxes should be checked).
11. Press OK in the Internet Options dialog box to save the Internet Explorer settings.

## 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.

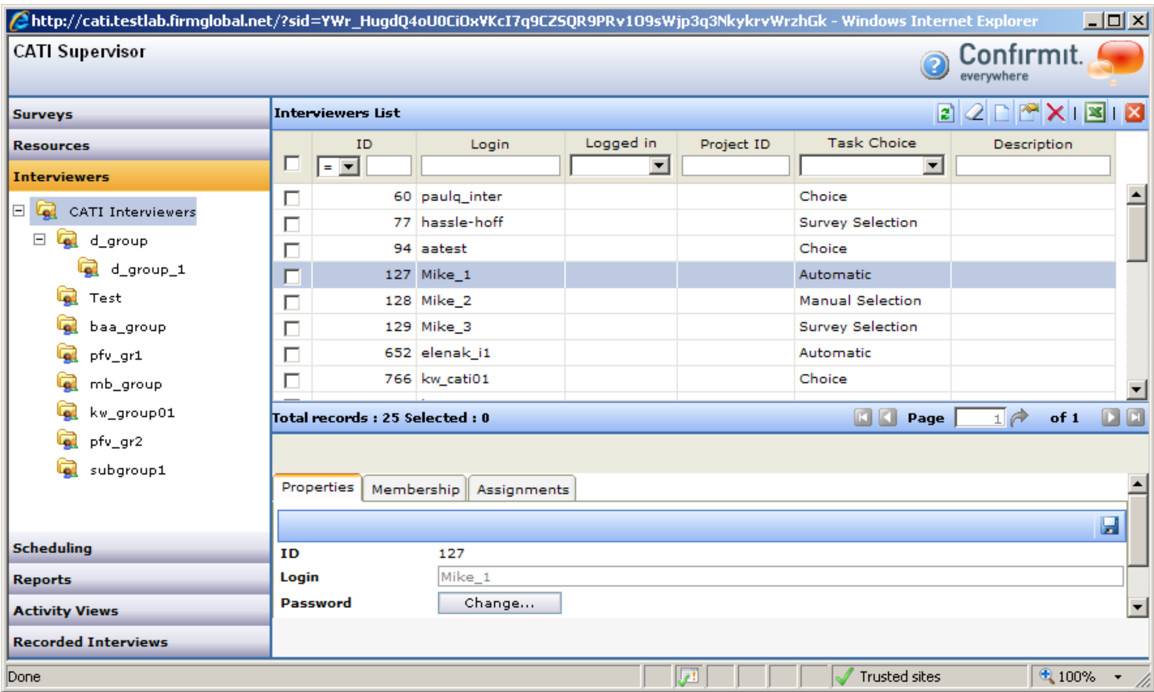



***Figure 1 The CATI Supervisor main window***

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).

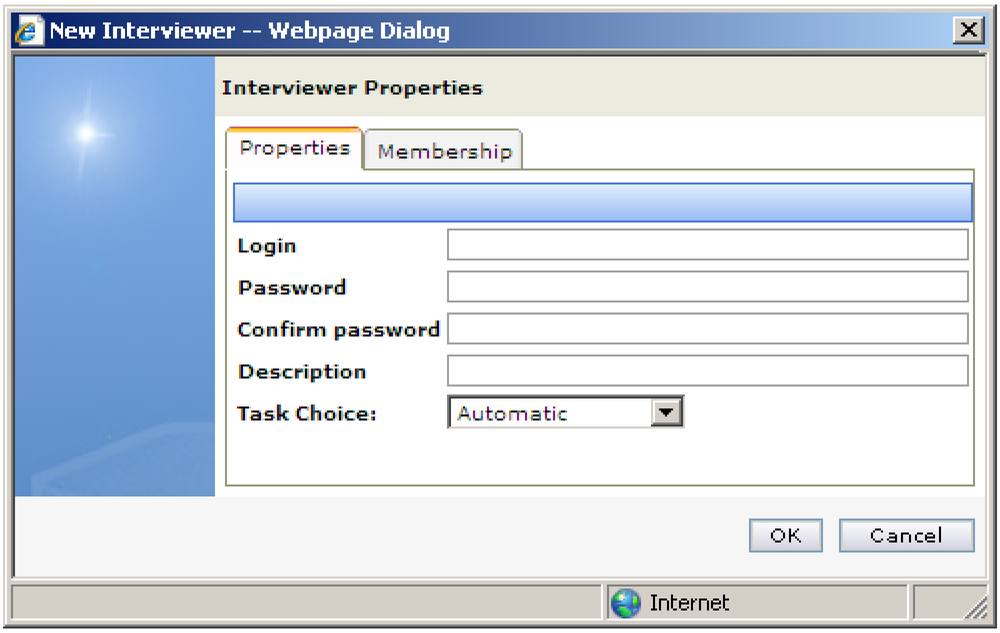



***Figure 2 The tabbed interface used with the dialog window***

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.

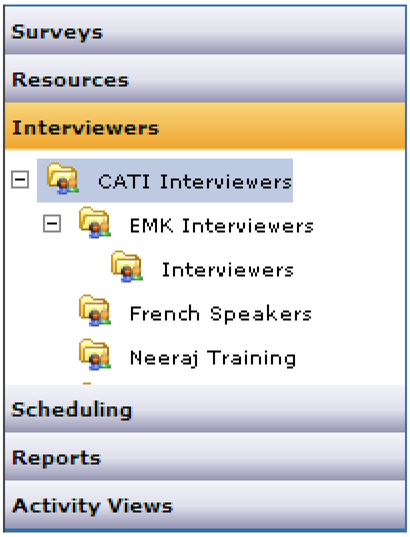



***Figure 3 The Navigation menu (the left frame)***

The following object types are accessible from the Navigation menu:

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

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

### 1.3.2 Tree lists and operations with tree elements

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

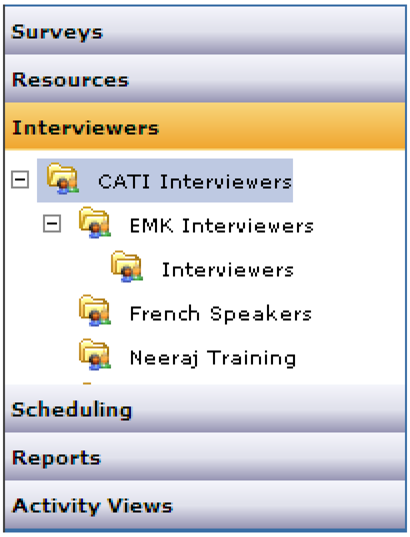



***Figure 4 Hierarchy tree in the Navigation menu***

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

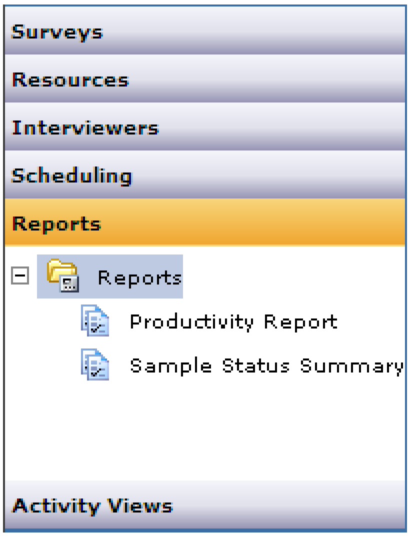



***Figure 5 Object groups in the Navigation menu***

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

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

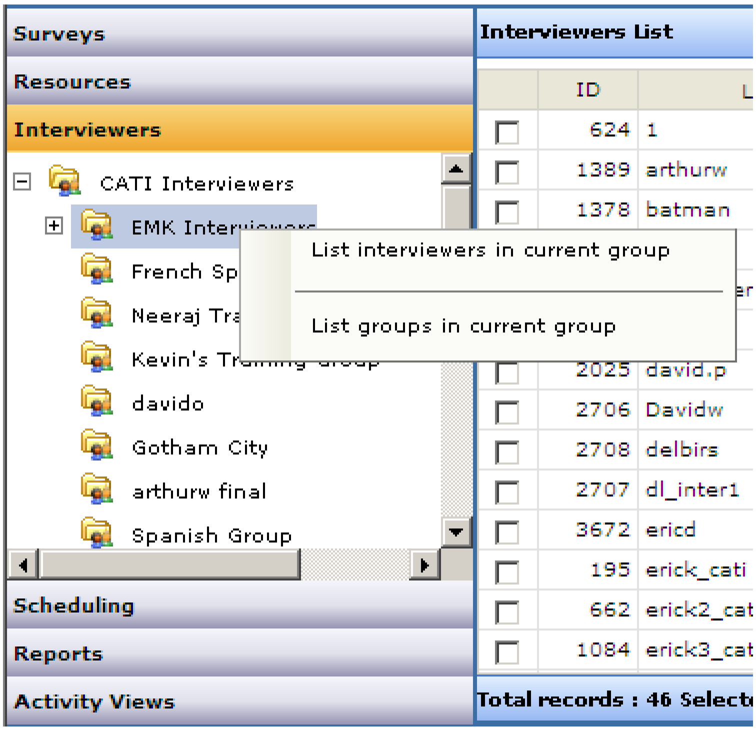



*Figure 6 Example of a context menu used with the Navigation menu items*

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

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

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

## 1.3.3 Object list

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

The top right frame contents may look somewhat like this.

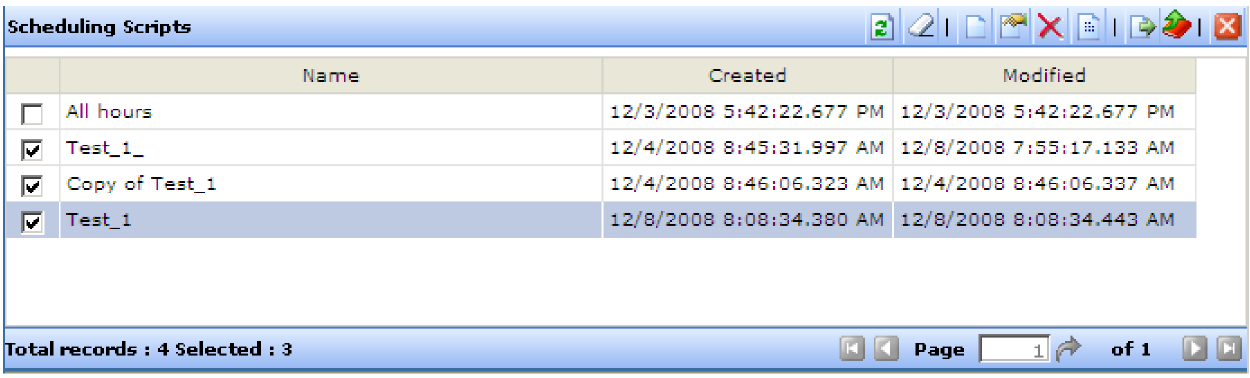



*Figure 7 Example of the top right frame contents*

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

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

The object list in the grid is refreshed automatically each time a new object is added to or deleted from the list. Alternatively the user can press the Refresh button  on the toolbar to refresh the list manually when it is required.

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

### 1.3.4 Customizing the grid layout

The grid appearance can be configured temporarily to make browsing more convenient. Columns containing particular details can be displayed or hidden, or be moved towards the grid beginning/end. Also the user can specify the number of grid rows to be displayed per page (per individual grid view). The contents of each column can also be sorted in ascending or descending order.

To access the grid display options the user should right-click the grid header row and choose Options from the shortcut menu. This will display the Options dialog window containing the corresponding options for configuring a grid containing objects of the certain type. The picture below shows such dialog used for customizing the layout of the grid displaying the interviewer groups.

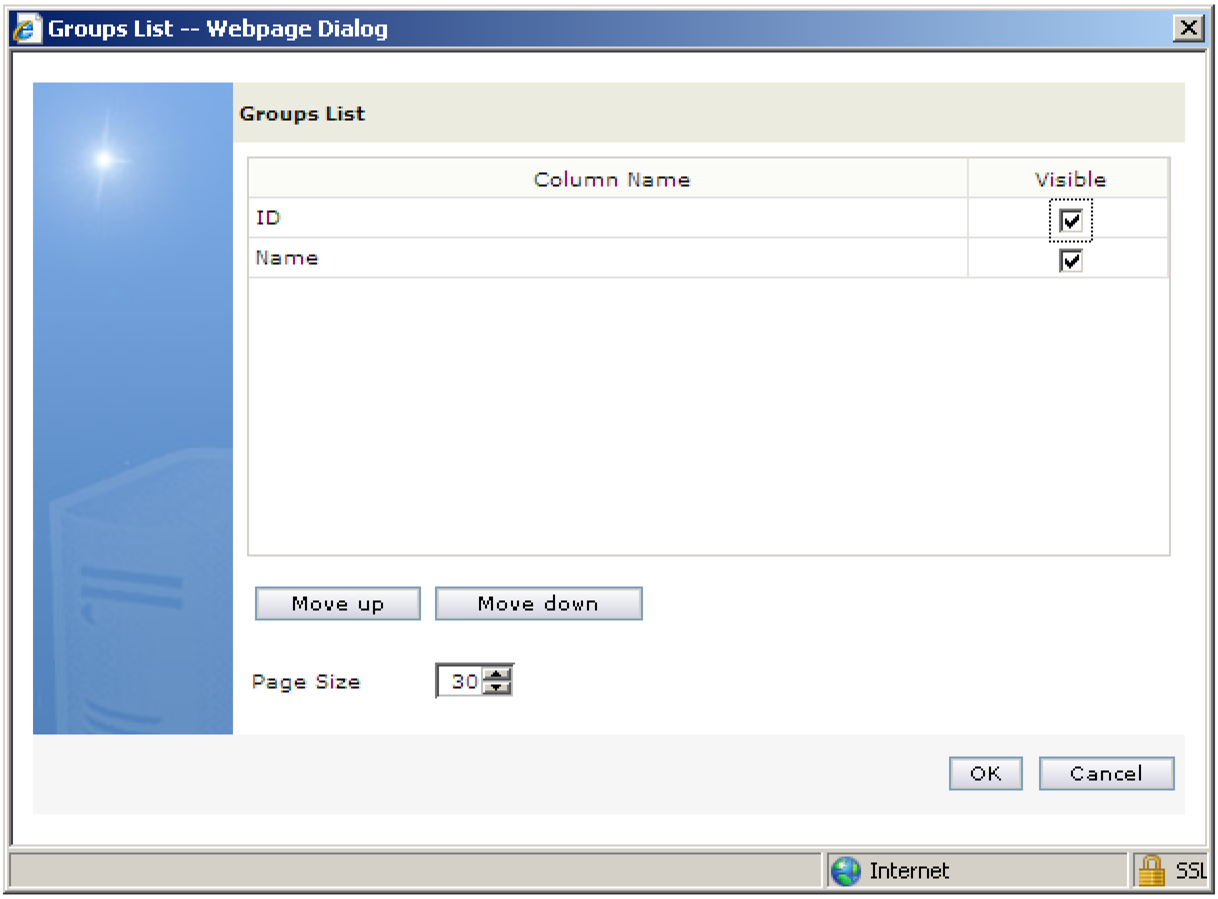



***Figure 8  The dialog window containing the grid customization options***

Choose a column name in the Column name column and either check the corresponding box in the Visible column to display it in the grid, or clear the box to hide it.

Select a column name in the Column name column and press either the MOVE UP or MOVE DOWN button to move this column, correspondingly, towards the beginning or towards the end of the grid.

Use the Page size spinbox to increase or decrease the number of rows displayed per individual grid page.

Press OK to apply the chosen settings. This will save the current grid layout as default. It will be applied any time the user chooses to display the list of objects of this type.

Press Cancel to close the window and discard any changes.

The specified settings are applied immediately after you press OK in the Options dialog window. The upper right frame is refreshed according to the new settings.

The grid column width can be altered by dragging the column border. To do so the user should position the mouse pointer on the column border in the grid header row and drag this border.

Each column contents can be sorted in ascending or descending order. To sort table contents by the column right-click the column header cell and choose Sort Ascending or Sort Descending from the shortcut menu. Applied sorting order is indicated with a triangle icon displayed in the column header.

You can also instantly sort the table contents of 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.

Grids for all object types are customized independently.

### 1.3.5 Browsing the grid

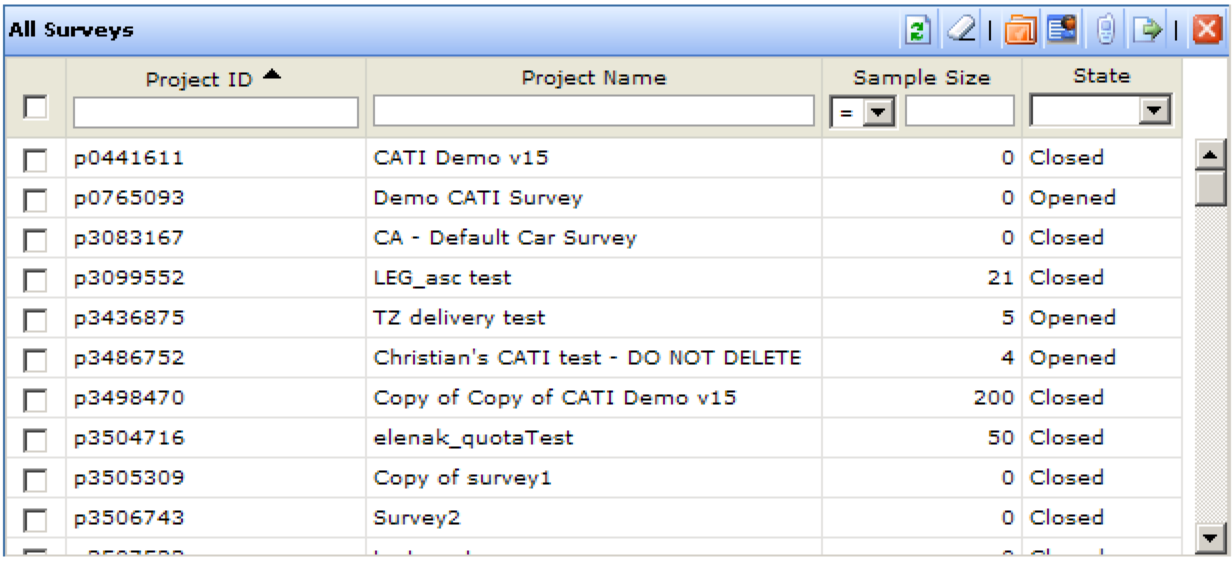
The left part of the bottom bar in the top right frame displays information on the amount of records – the total and the number of currently selected records. The right part of this bottom bar contains the grid browsing controls and also displays the number of the currently viewed grid page.

The user can browse the grid pages (if objects 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.

### 1.3.6 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. Only one

Each column contents can be sorted in ascending or descending order. To sort table contents by the column right-click the column header cell and choose Sort Ascending or Sort Descending from the shortcut menu. Applied sorting order is indicated with a triangle icon displayed in the column header.



All Surveys

| Project ID | Project Name | Sample Size | State |
|---|---|---|---|
| p0441611 | CATI Demo v15 | 0 | Closed |
| p0765093 | Demo CATI Survey | 0 | Opened |
| p3083167 | CA - Default Car Survey | 0 | Closed |
| p3099552 | LEG_asc test | 21 | Closed |
| p3436875 | TZ delivery test | 5 | Opened |
| p3486752 | Christian's CATI test - DO NOT DELETE | 4 | Opened |
| p3498470 | Copy of Copy of CATI Demo v15 | 200 | Closed |
| p3504716 | elenak_quotaTest | 50 | Closed |
| p3505309 | Copy of survey1 | 0 | Closed |
| p3506743 | Survey2 | 0 | Closed |

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

You can also instantly sort the table contents of 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.

### 1.3.7 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.

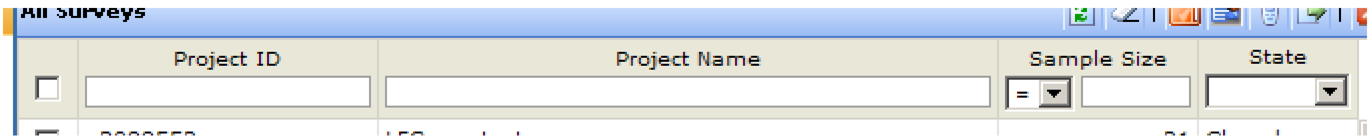



*Figure 10 Grid header row with search functionality*

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

If you enter a string into a 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 should:

- 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 See "Sorting objects in the list" on page 9) works on the filtered list.

### 1.3.8 Selecting objects in the list

Before you apply an operation to the object you should first select it. If apply an operation with no object selected, the CATI Supervisor module warns you by There are two ways to select an object - to highlight this object (corresponding row) in the list, or to check the box in the leftmost column in the corresponding row.

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.

But if you are going to select a number of objects, you can do that only by checking boxes in the rows corresponding to these objects.

All objects in the list 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.

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

### 1.3.9 Performing operations on objects contained in the grid list

Operations on particular objects can be performed in either of two ways:

- Selecting a grid row(s) (see See "Selecting objects in the list" on page 10 for instructions on how to select objects in the list), which contains particular object details, and then choosing the appropriate button in the title bar, or
- Right-clicking a grid row, which contains particular object details, and then choosing the appropriate command from the shortcut menu.

### 1.3.10 Object settings 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.

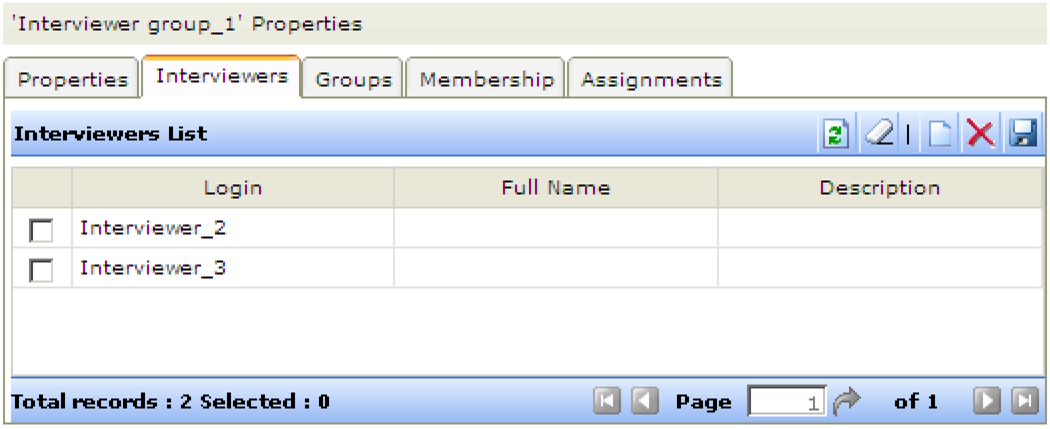



***Figure 11 Contents of the bottom right frame - an example***

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 6 section for a description of these user interface elements.

If the user modifies any setting on any tab in the bottom right frame, they should press the Save button to apply the changes. If the user chooses to view another objects 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 which 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 (please refer to The CATI Console manual for this utility description).

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

Please readManaging interviewer groups below for instructions on managing interviewer groups, and Managing interviewers on page 20 – 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.

### 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 inside this 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.

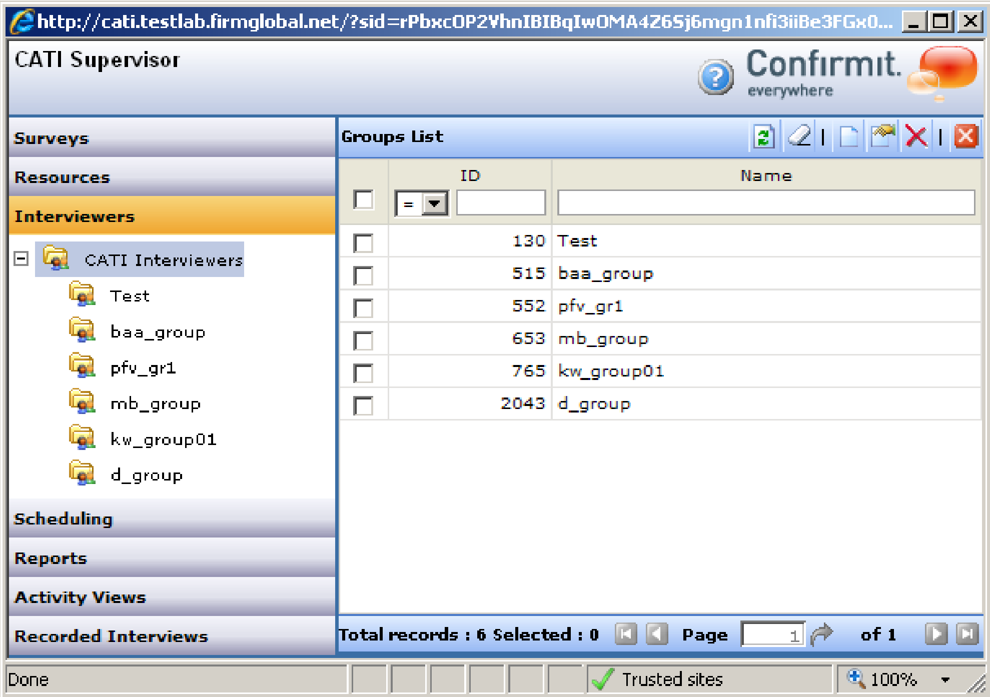



*Figure 12 Viewing the interviewer group list in the top right frame*

3. The user can perform the following operations with interviewer groups:
   - View and modify the interviewer group properties;
   - Add or delete interviewer groups;
   - Export currently displayed interviewer group list as a file in MS Excel format.

   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) |
|  | EXPORT | Allows exporting the list currently displayed in the top right frame |
|  | CLOSE WINDOW | Closes the CATI Supervisor dialog 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.

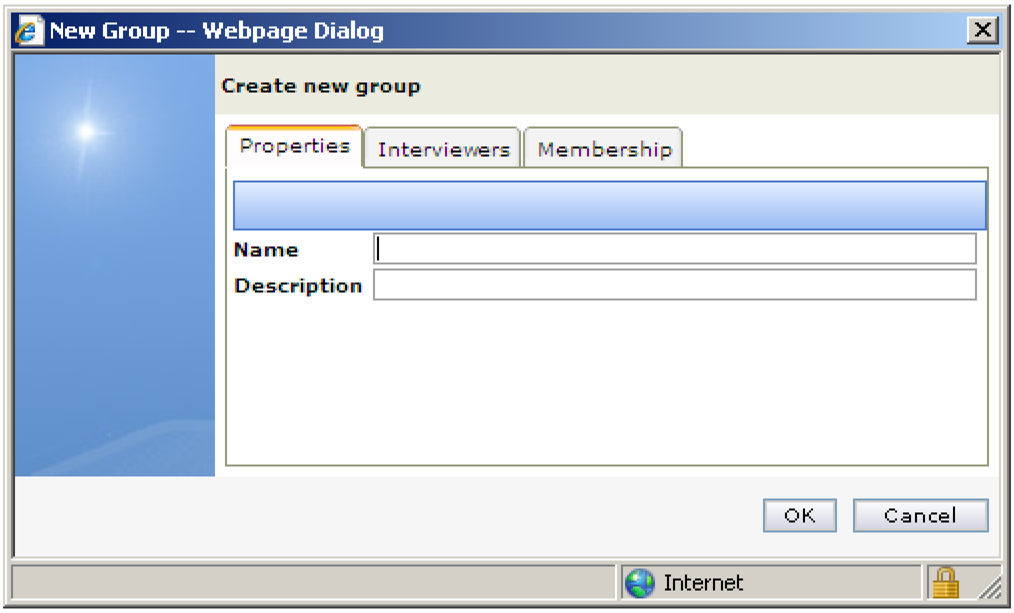



*Figure 13 New Group dialog window - Properties tab*

   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.

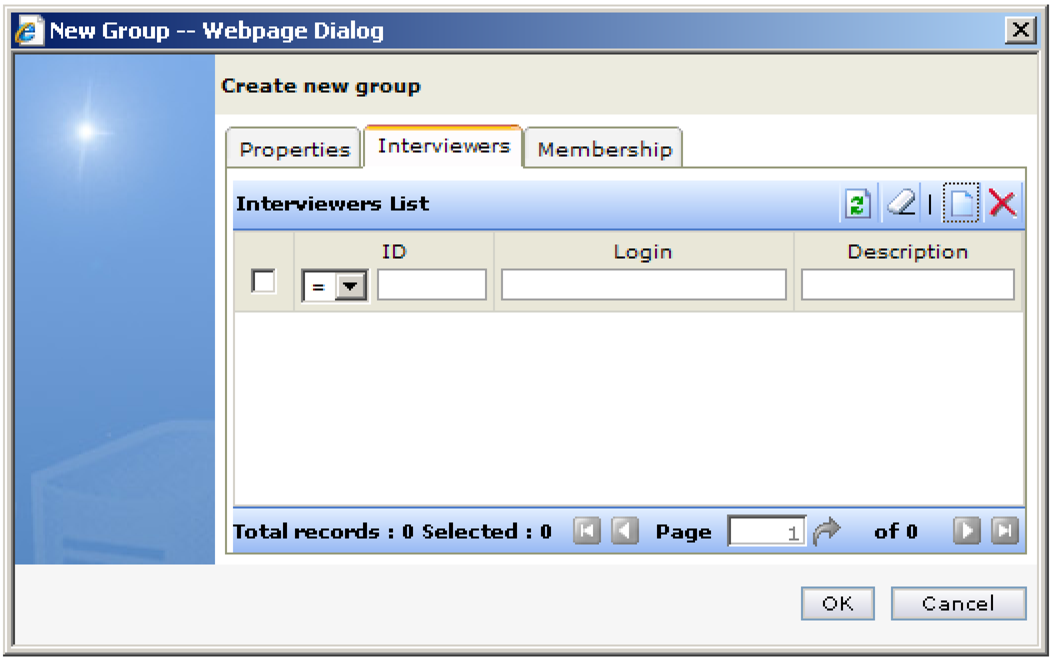



*Figure 14  New Group dialog window - Interviewers tab*

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.

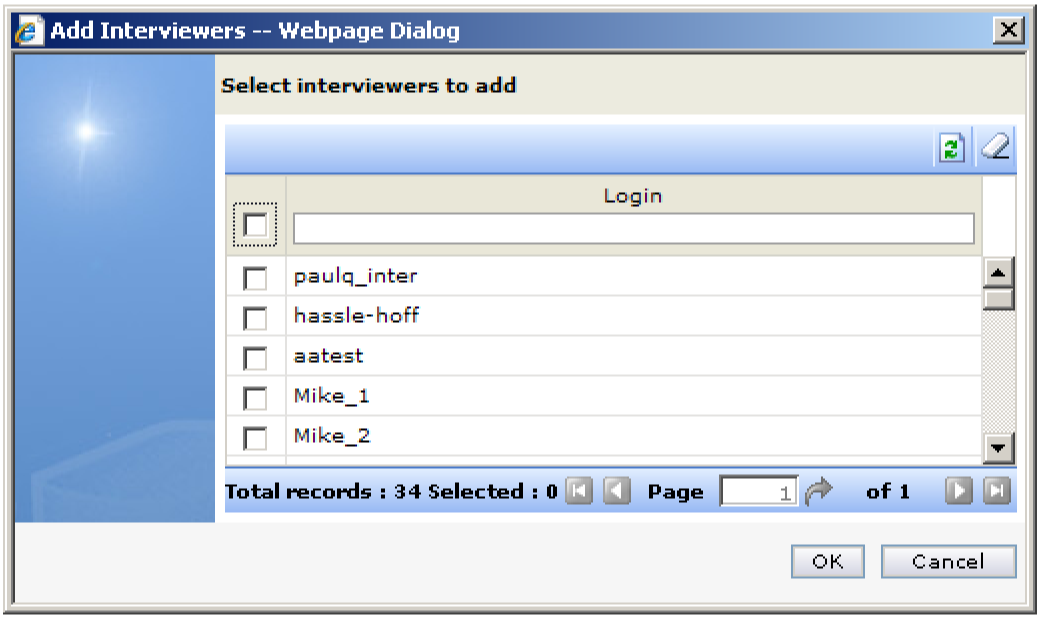



*Figure 15  Selecting interviewers to add to the Interviewers tab*

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 22 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.

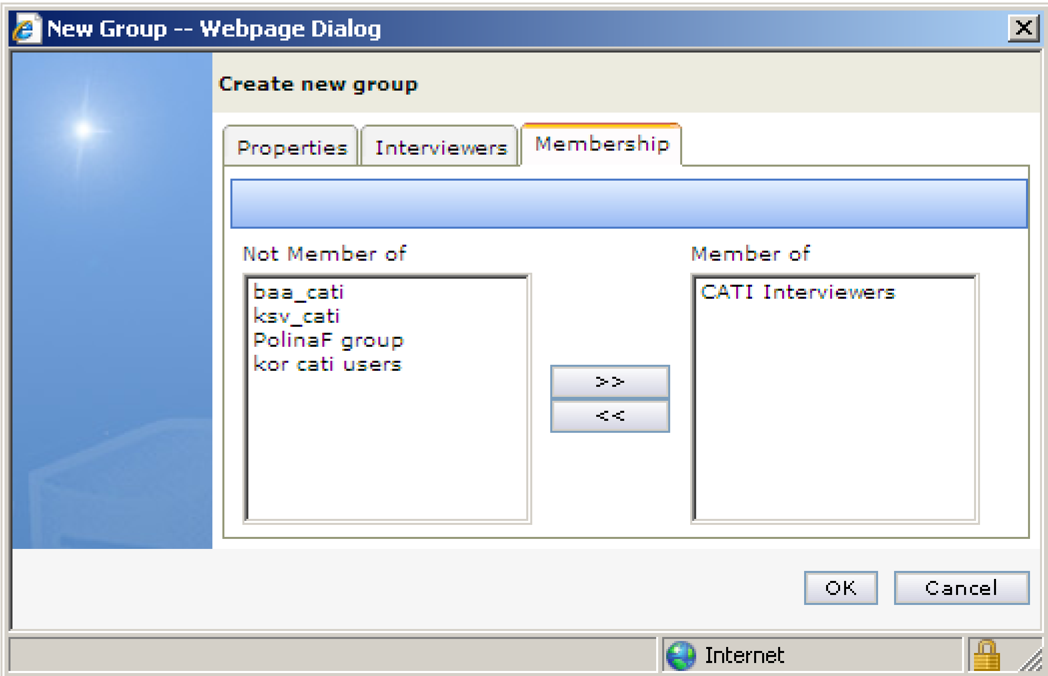



***Figure 16 New Group dialog window - Membership tab***

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 17 Interviewer group properties, Properties tab - the right bottom frame***

3. All tabs except for the Assignment tab are similar to those used with the New Group dialog window (see Adding and deleting an interviewer group on page 14 for description). The same work technique is applied with these tabs.

   Pictures below show these tabs.

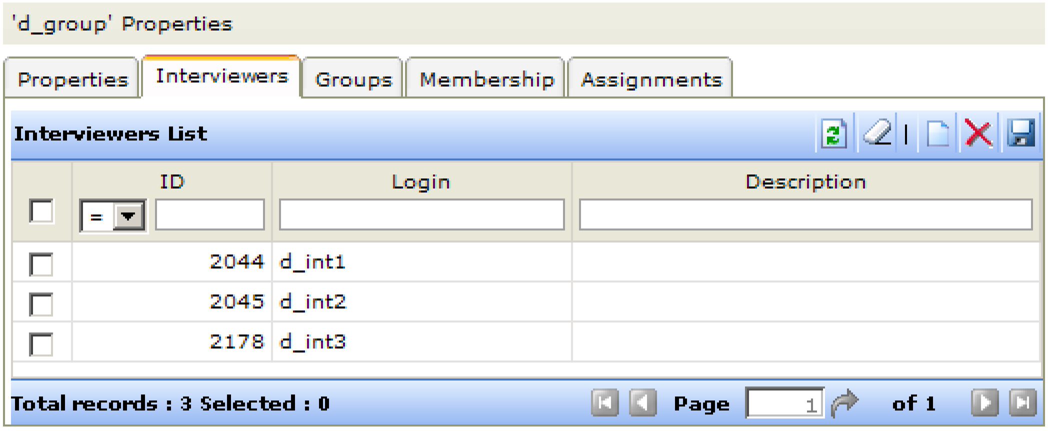



*Figure 18 Interviewer group properties, Interviewers tab - the right bottom frame*

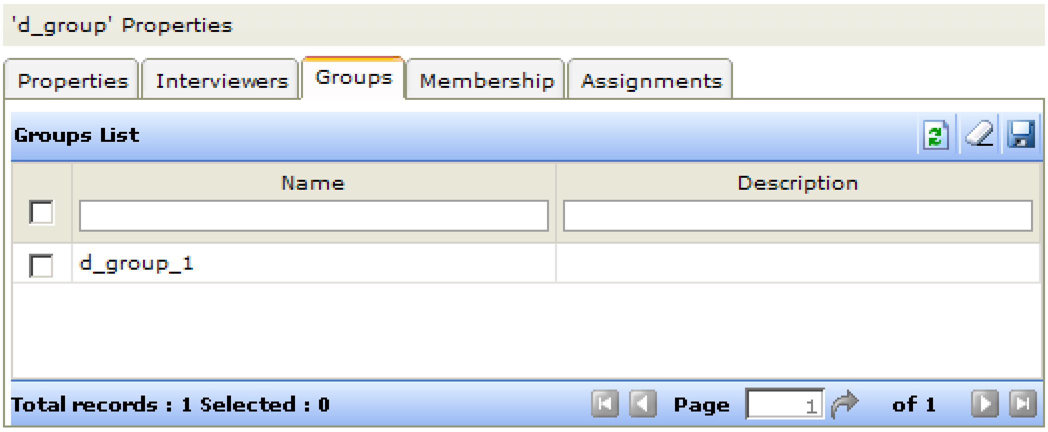



*Figure 19 Interviewer group properties, Groups tab - the right bottom frame*

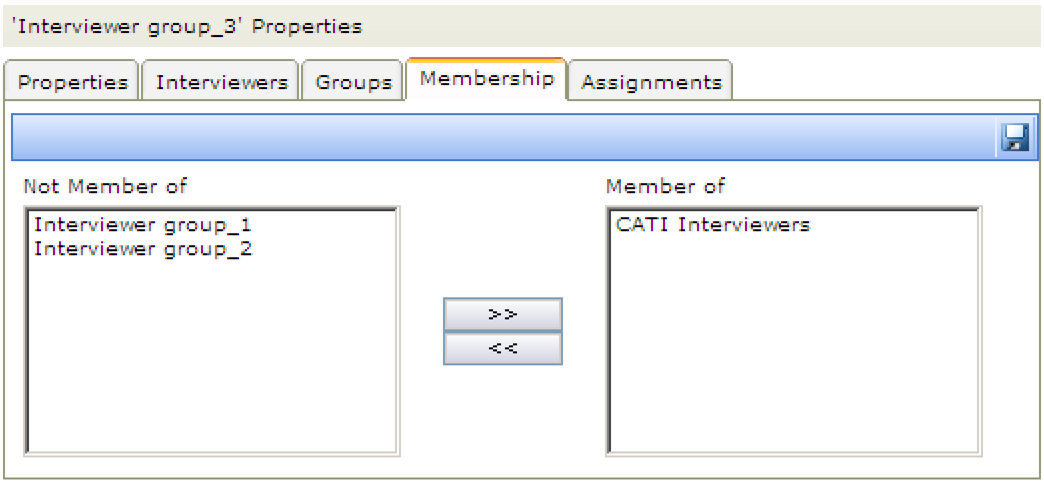



*Figure 20 Interviewer group properties, Membership tab - the right bottom frame*

Please note that all tabs contain an extra button on the toolbar – this is the Save button . The Save button starts blinking when you modify any property prompting you to save the changes. When you press this button and save the changes it stops blinking.

4. The Assignment tab allows viewing, adding and deleting survey assignments (de-assigning surveys) for the current interviewer group.

   Note that this tab displays assignments only for the current group and not for any of its members (neither for interviewers, nor for groups belonging to that group).

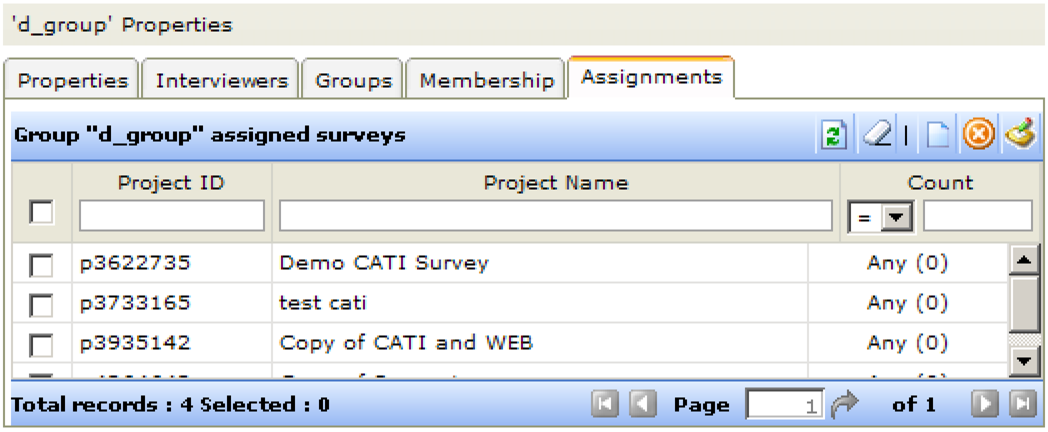



*Figure 21 Interviewer group properties, Assignments tab - the right bottom frame*

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.

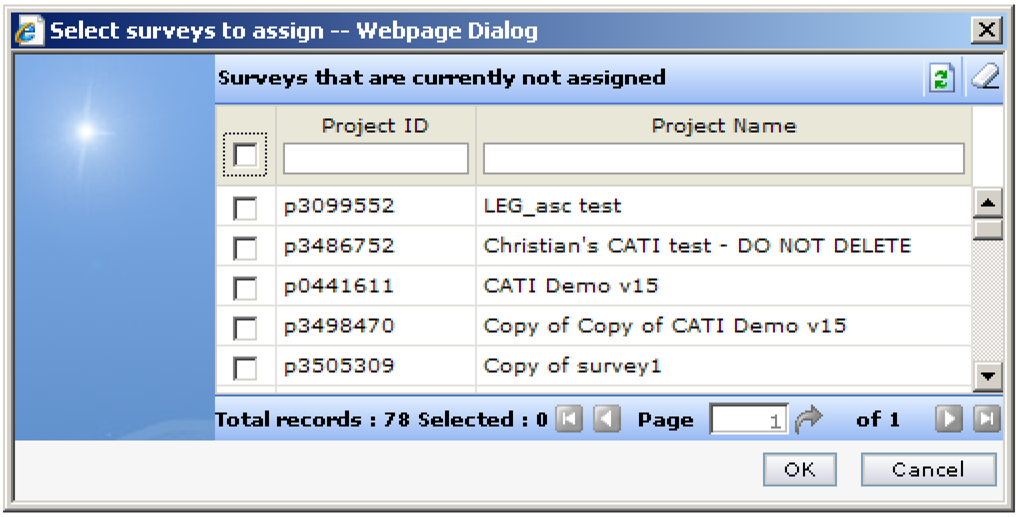



*Figure 22 Selecting a survey to assign using the Select surveys to assign dialog window*

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

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. There is also a way for Supervisor to forcibly set up a survey, on which interviewers belonging to the certain group will start interviewing the next time they log into the CATI Interviewer Console. This action can only be applied to a group that was already assigned to work in the Survey Selection mode. And only already assigned survey can be set as the Automatic Survey.

   To set an Automatic Survey for the current group select a survey in the list on the Assignments tab and press the Set Automatic Survey button in the tab toolbar.

5. Added surveys can be de-assigned (removed from the list) in the Interviewers 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.

## 2.2 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.

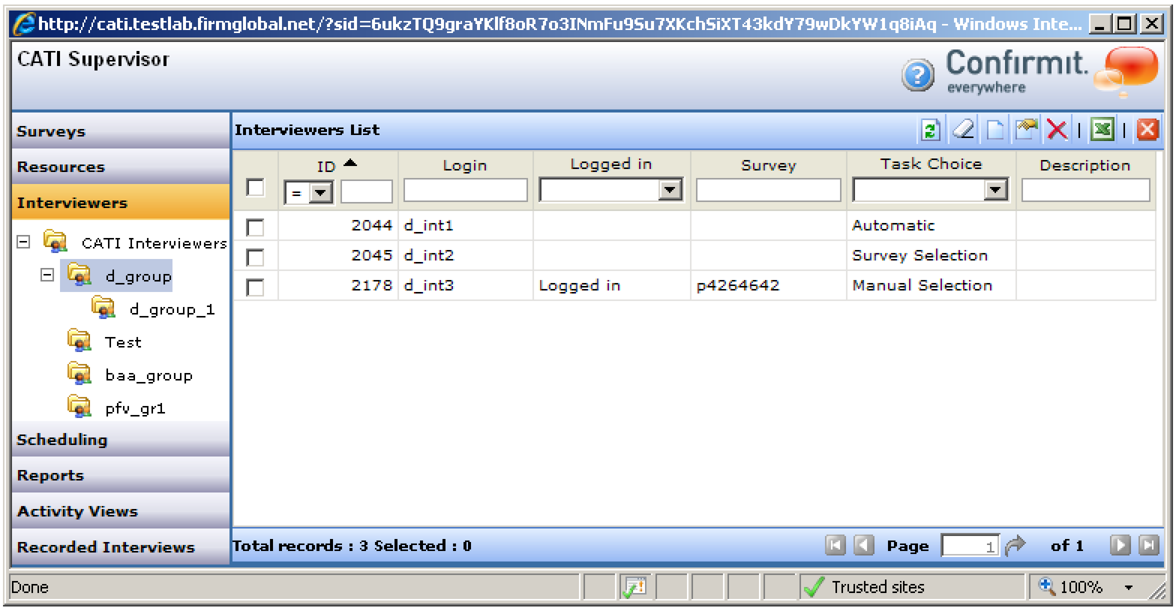



*Figure 23 Viewing the interviewer list in the top right frame*

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 page 20 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.

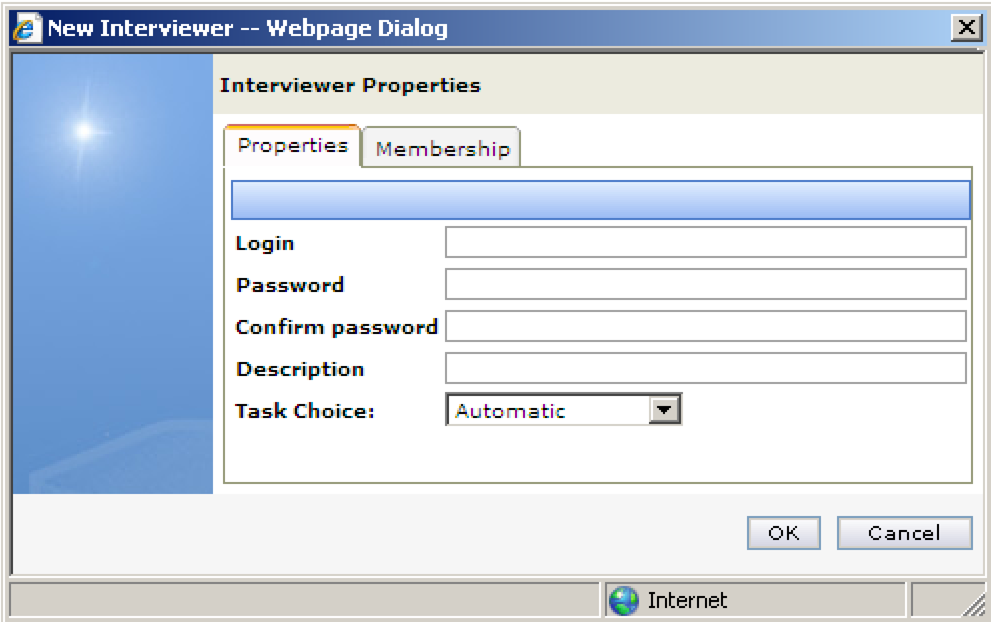



***Figure 24 New Interviewer dialog window - Properties tab***

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. 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 interviewer 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.

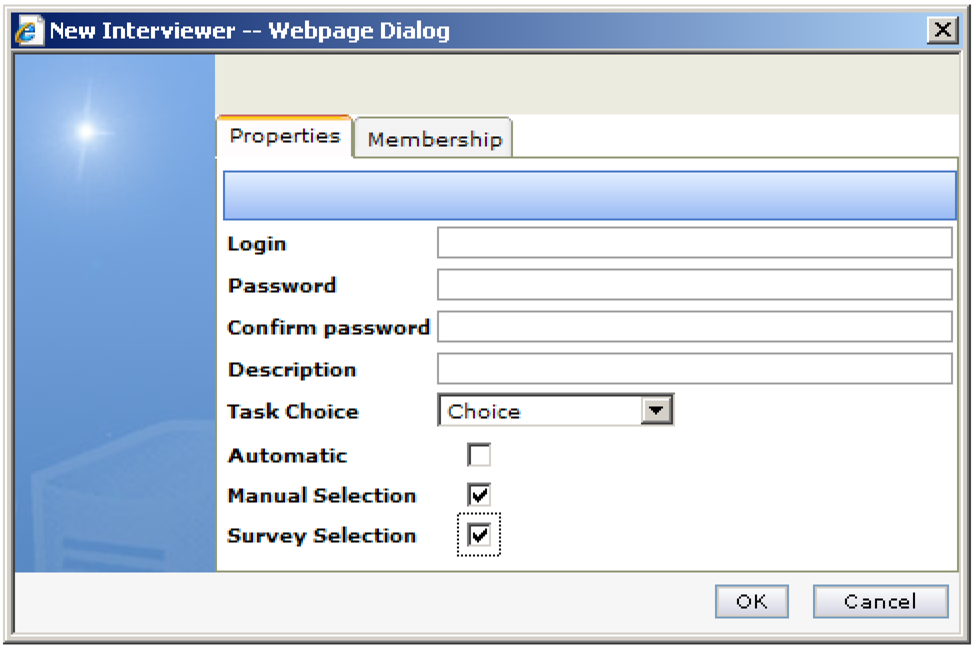



***Figure 25 Selecting the "Choice" mode***

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

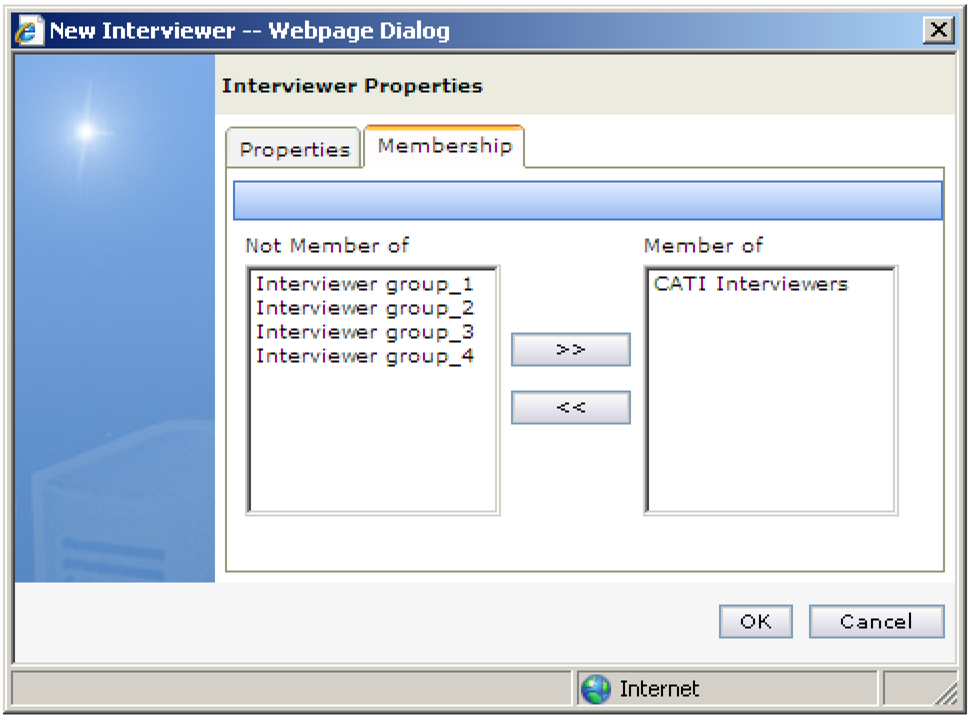



***Figure 26  New Interviewer dialog window - Membership tab***

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.

7. 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 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. All tabs except for the Assignments tab are similar to those used with the New Interviewer dialog window (see Adding and deleting an interviewer on page 22 for description). The same work technique is applied with these tabs.

   Pictures below show these tabs.

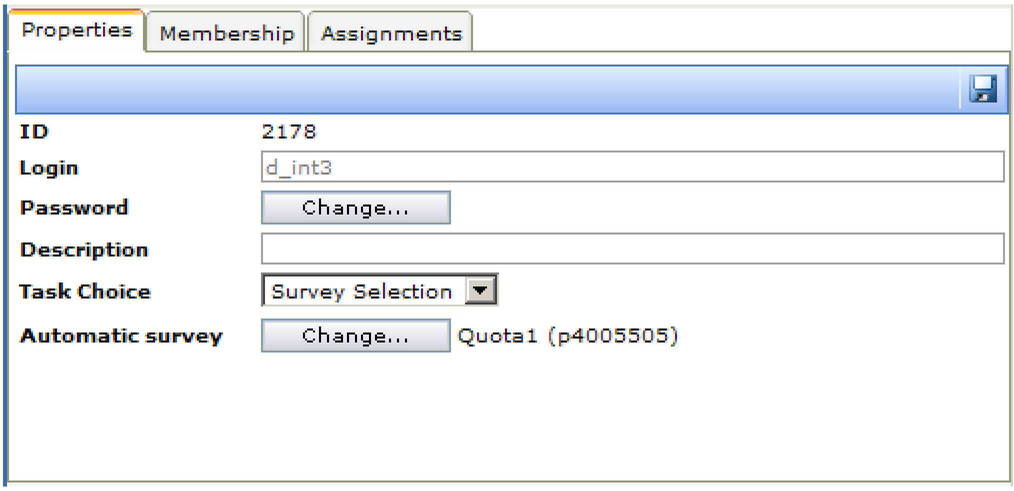



***Figure 27  Interviewer properties, the Properties tab - the bottom right frame***

You can press the Change button to change the current interviewer 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 password.

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

The Task Choice field allows specifying how calls will be delivered to the interviewer when he will work with the CATI Interviewer Console (the Task Choice mode - see Selecting a Survey/Interview on page 102 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 it will display the Automatic survey option. Please refer to Selecting a Survey/Interview on page 102 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.

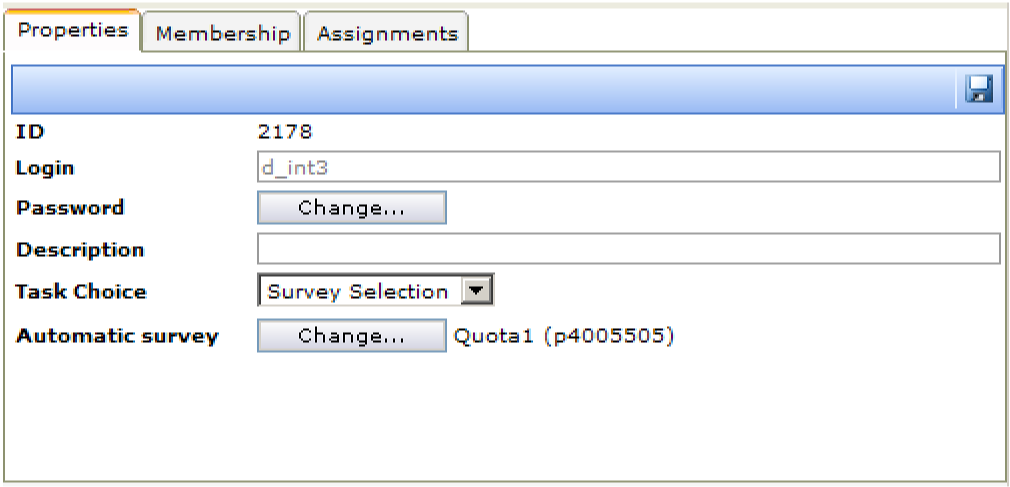



***Figure 28 Interviewer properties, the Properties tab - the Survey Selection mode is chosen***

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.

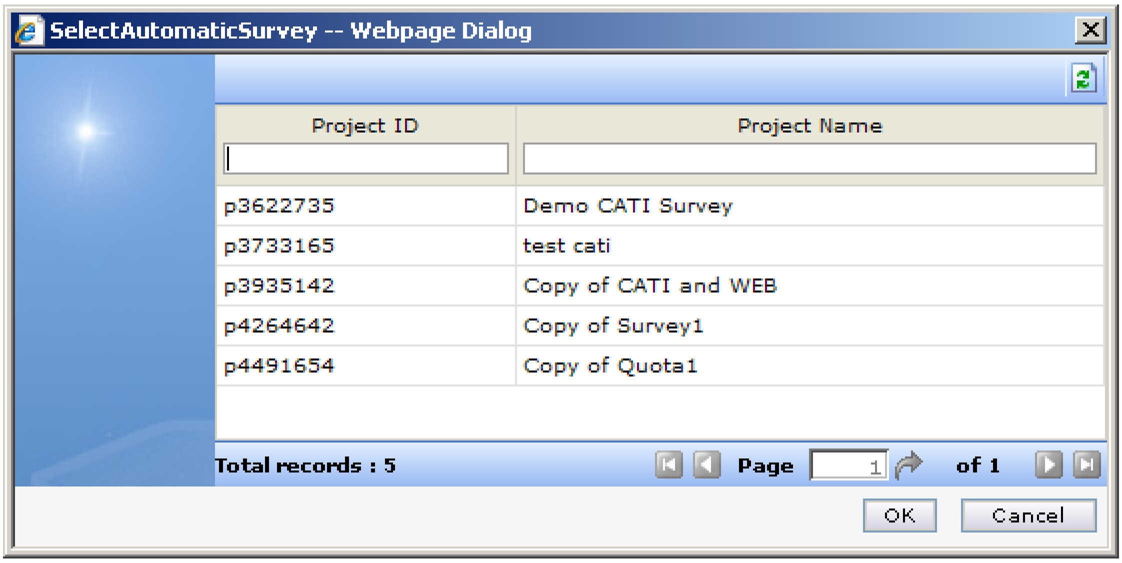



***Figure 29 Selecting an Automatic survey in the Survey Selection task choice mode***

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 See "Choice mode" on page 107 for more details on working in the Choice mode.

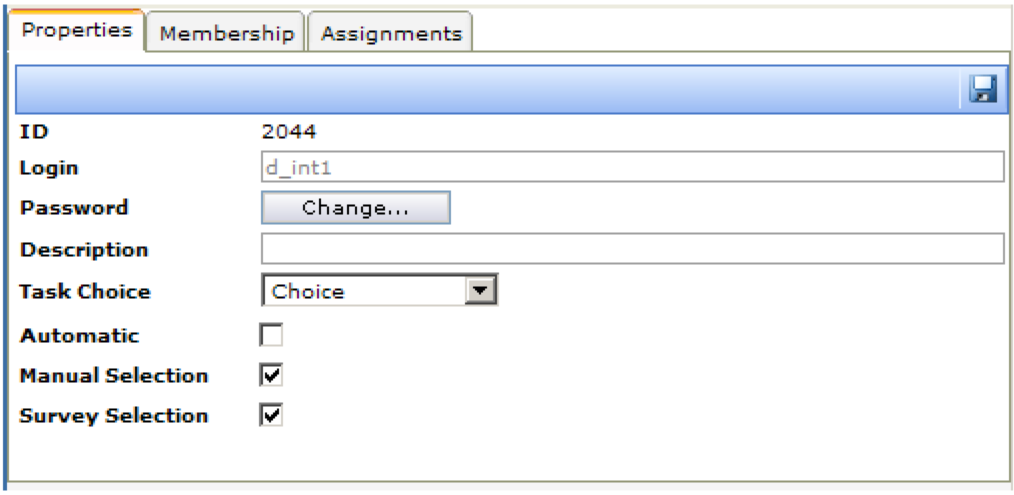



***Figure 30 Interviewer properties, the Properties tab - the Choice mode is selected***

Also a combination of the Survey Selection and Choice modes is possible. This may happen in case the interviewer was already assigned some survey to be served as an Automatic Survey in the Survey Selection mode, and the Supervisor additionally assigns him a selection of task choice modes. The picture below illustrates the situation. The mode assignment procedure in such case is similar to those described above.

If you clear the Survey Selection checkbox in such case, the Automatic Survey option will be removed, and will not be restored until you change the Task Choice mode back to Survey Selection (using the Task Choice field), and assign the Automatic Survey again.

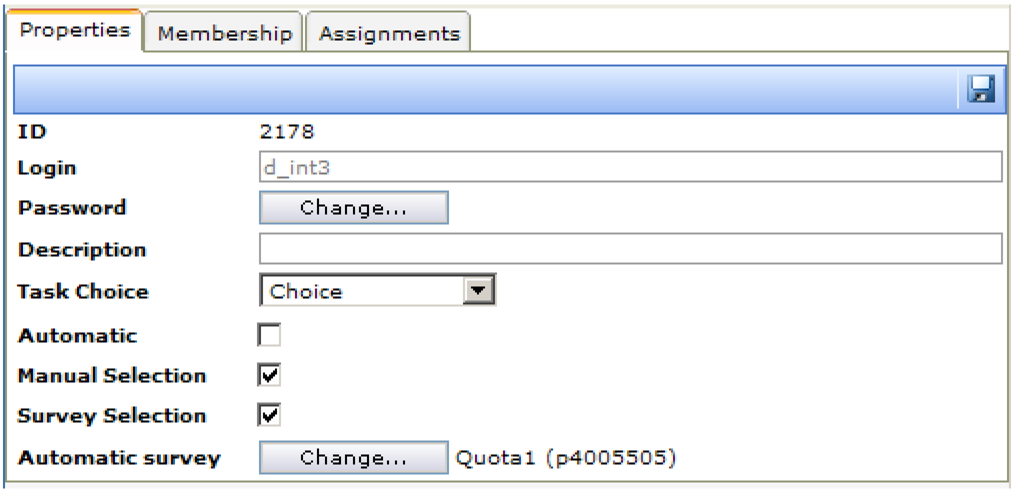



***Figure 31 Interviewer properties, the Properties tab - the Choice mode is selected for the interviewer who was already assigned to an Automatic Survey***

The Task Choice mode can also be changed from the Interviewer List (see Viewing the interviewer list on page 20 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 33 for instructions.

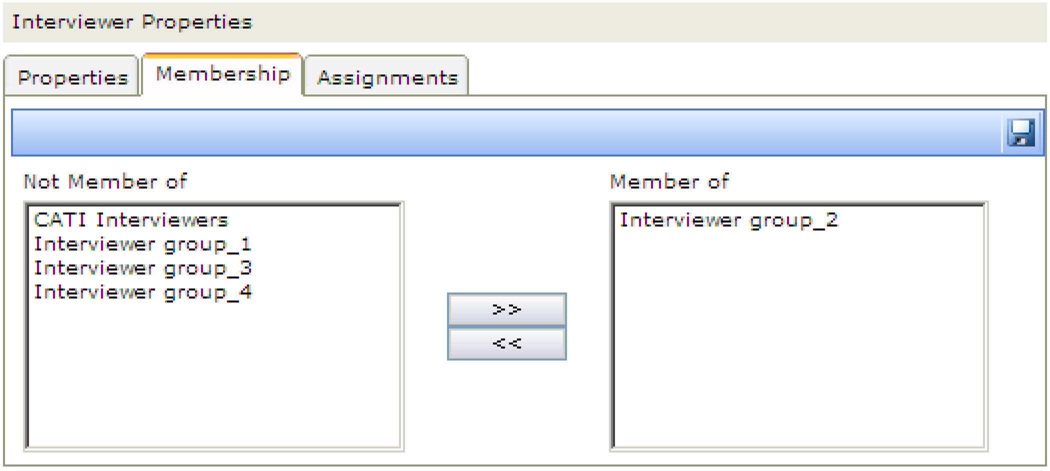



***Figure 32 Interviewer properties, the Membership tab - the bottom right frame***

Please pay attention that any tab contains an extra button in its toolbar – this is the Save button . The Save button starts blinking when you modify any property prompting you to save the changes. When you press this button and save the changes it stops blinking.

4. The Assignments tab allows viewing, adding and deleting survey assignments (de-assigning surveys) for the current interviewer.

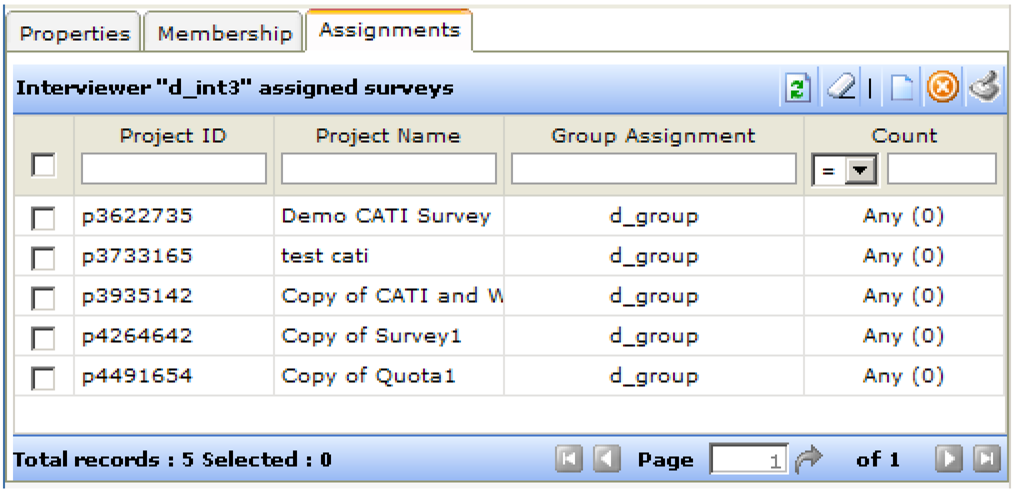



***Figure 33 Interviewer properties, the Assignments tab - the bottom right frame***

Note that this tab displays assignments made both for the current interviewer personally and also for the group he belongs to.

The list in this 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 dialog window.

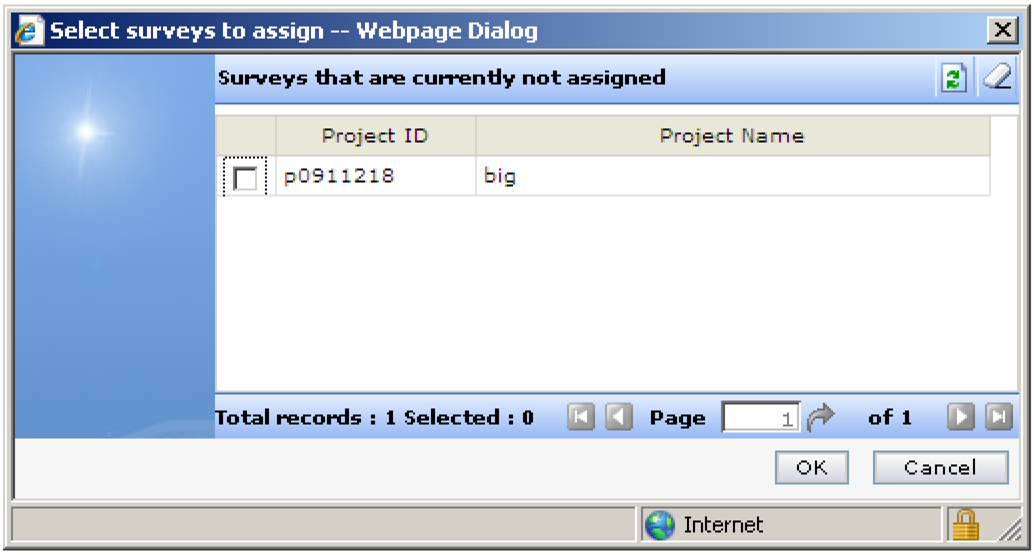



***Figure 34  Selecting a survey to assign using the Select surveys dialog window***

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. 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 change it.

   To set an Automatic Survey for the interviewer select a survey in the list and press the Set Automatic Survey button in the tab toolbar.

   This will display the Select Automatic Survey dialog window. This window allows selecting an Automatic survey. Refer to the procedure described in the previous step.

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.

### 2.2.4 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 35  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 20 for instructions).
2. Press the Import button on the toolbar. This will display the Import dialog window.

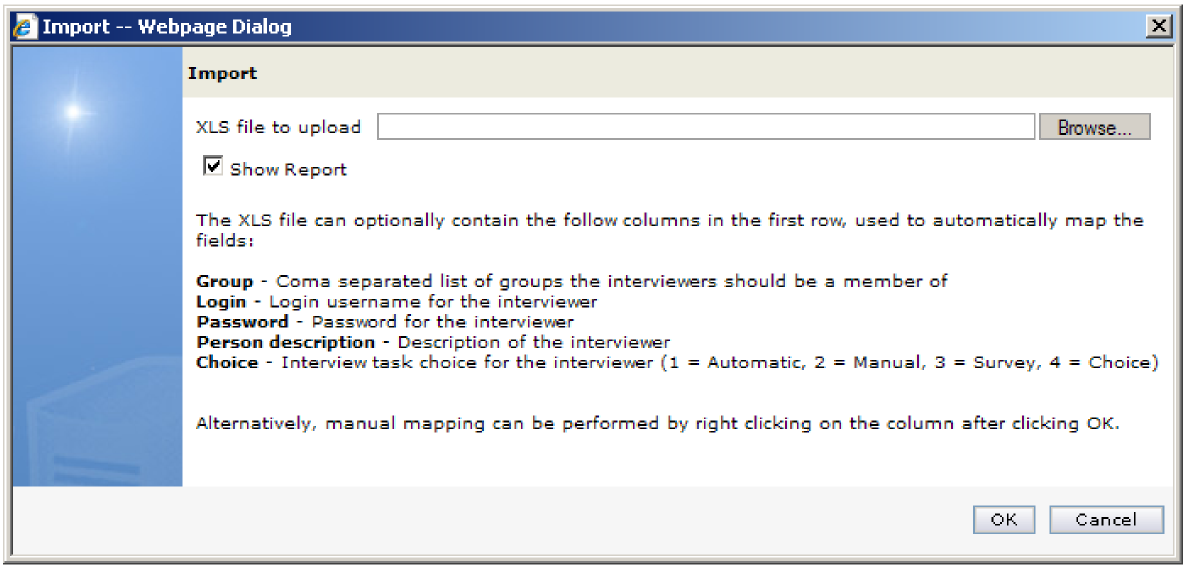



***Figure 36  Importing the interviewer list from a file***

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.

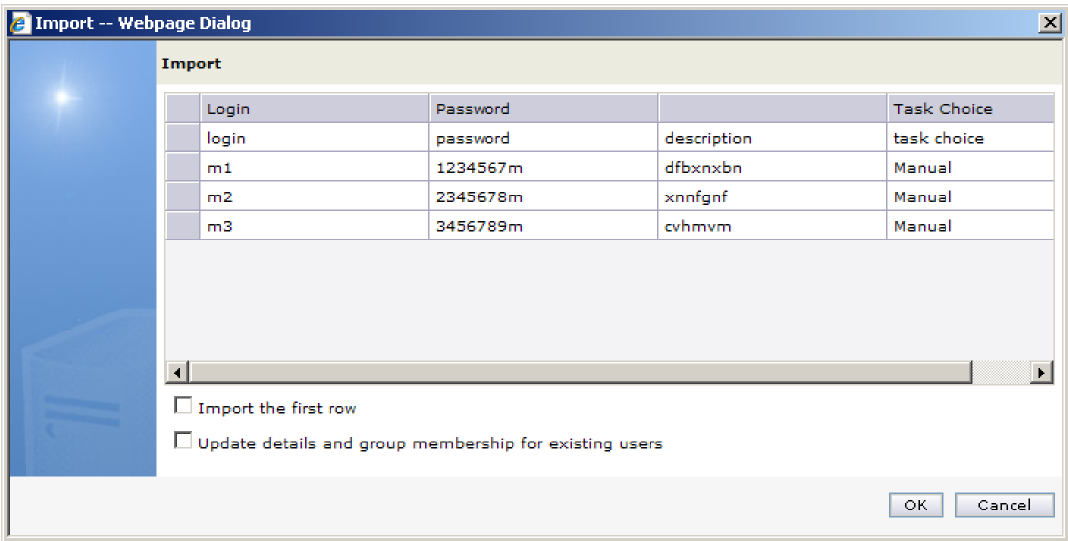



***Figure 37  Importing the interviewer list from MS Excel file***

***Figure 38***

7. You can decide whether or not you want to import the first table row (a table header row which assigns column roles). Check the Import the first row box to enable this option. Always check this box if you need to assign column roles based on values contained in the header row (see step 10 below). Never enable this option if you are going to assign the column roles manually (see step 9 below), or in case the imported file does not contain column role names in the first row. Remember to check the role name spelling - incorrect spelling will result in CATI Supervisor rejecting the imported file (character case is not checked).
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.

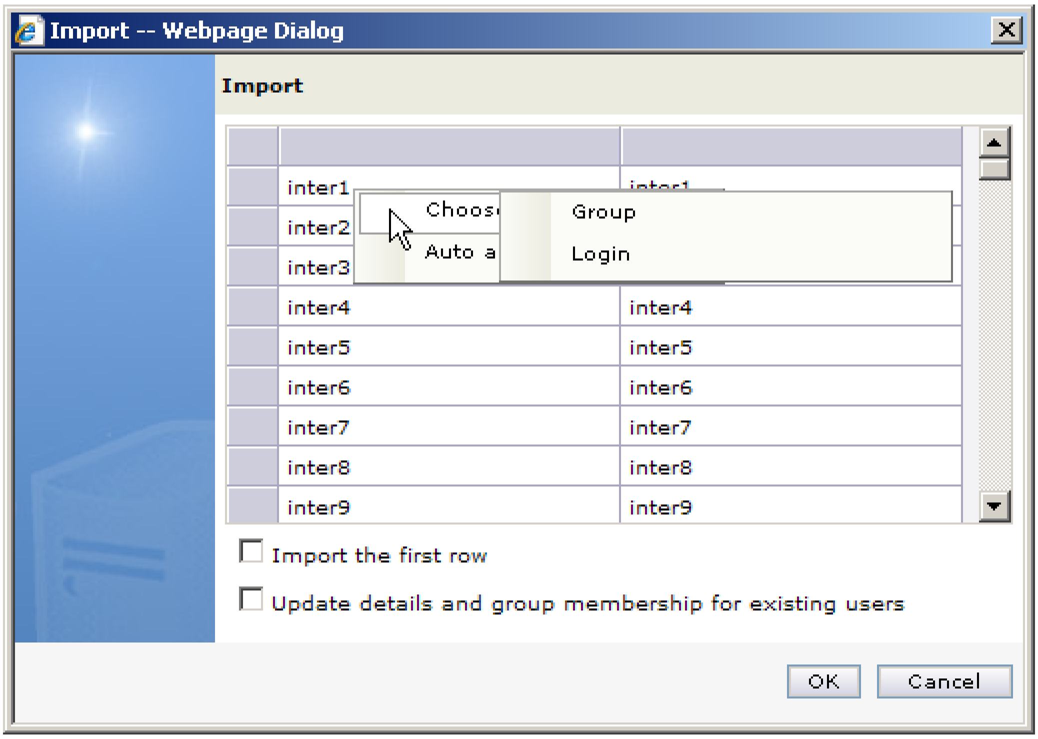



***Figure 39 Assigning column roles to the imported table containing interviewer list***

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

Remember to disable the Import the first row option when using this command (see step 7 above).

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 the values from the first row – this option will use values from the header row to assign column roles;
    - Based on the 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.

### 2.2.5 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 25 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 20 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.

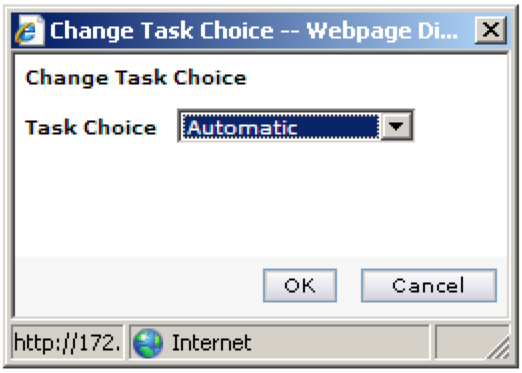



*Figure 40 Changing the task choice mode for an interviewer in a dedicated dialog window*

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).

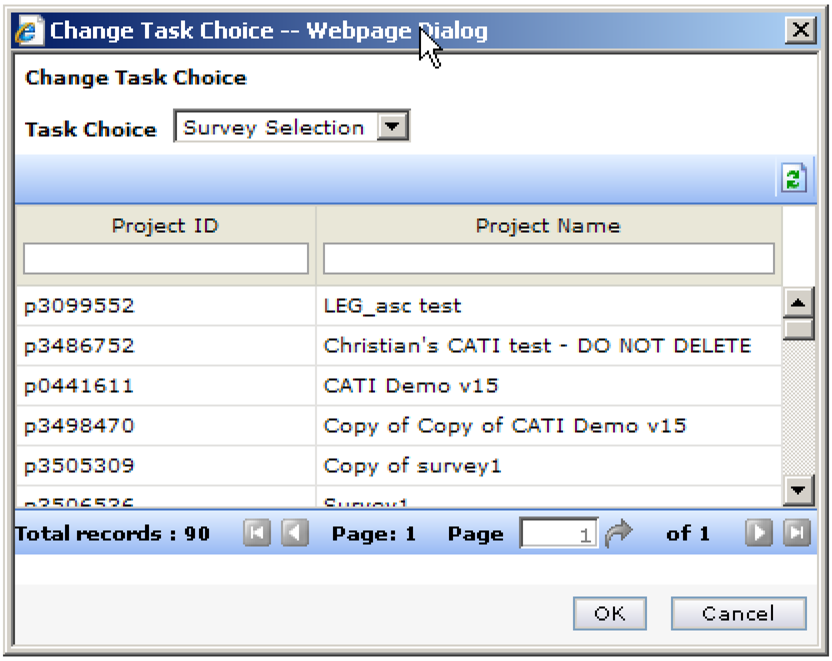



*Figure 41 The Change Task Choice dialog window with the Survey Selection mode chosen*

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).

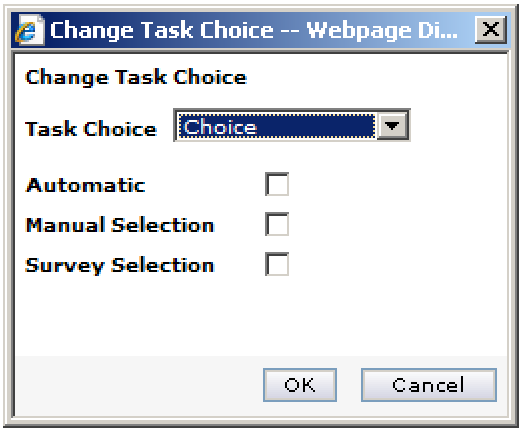



*Figure 42 The Change Task Choice dialog window with the Choice mode chosen*

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.

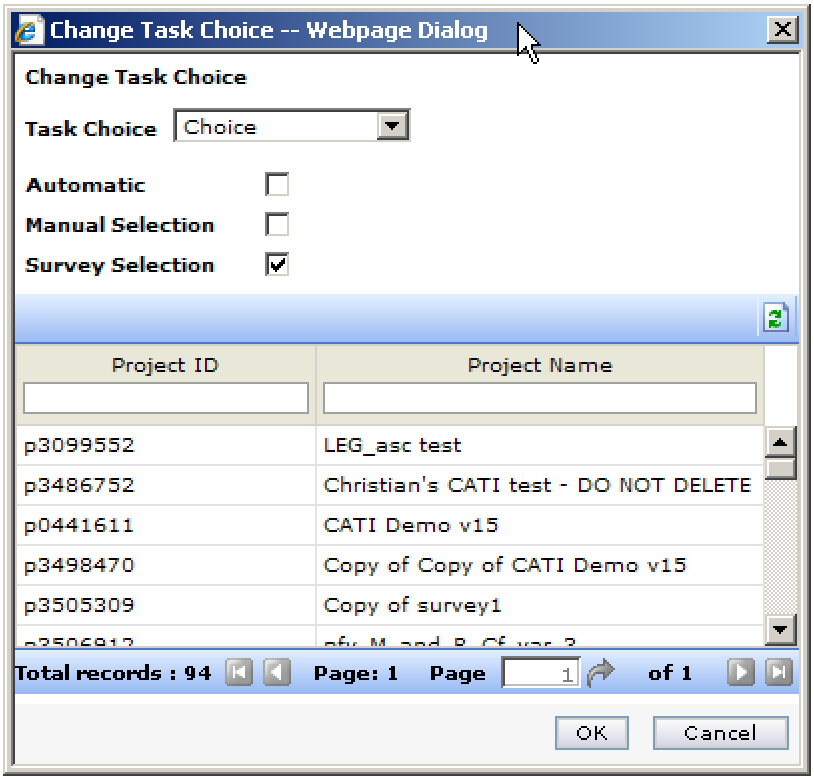



***Figure 43 The Change Task Choice dialog window with the Choice mode chosen - configuring the Survey Selection mode***

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.

# 3 Survey management

Survey management in the CATI module is a complex routine involving monitoring and management of all surveys added to the module. This includes the definition of survey properties, interview and call configuration and survey assignment.

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.

Interviews/calls 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.

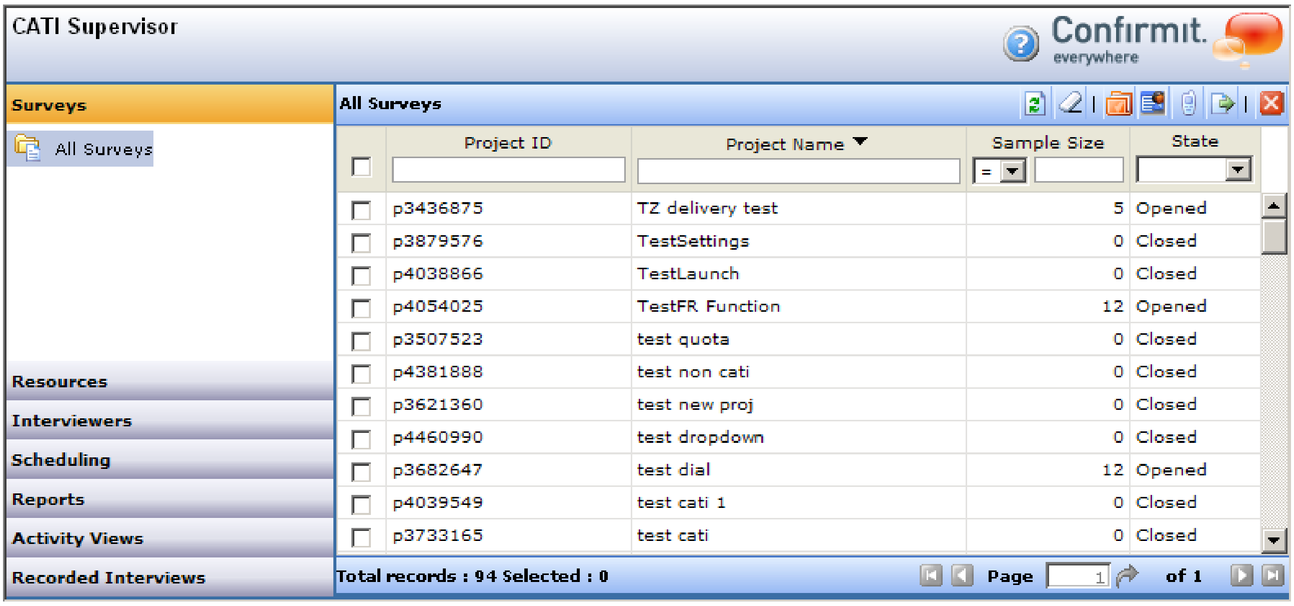



***Figure 44  Viewing the survey list***

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 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.

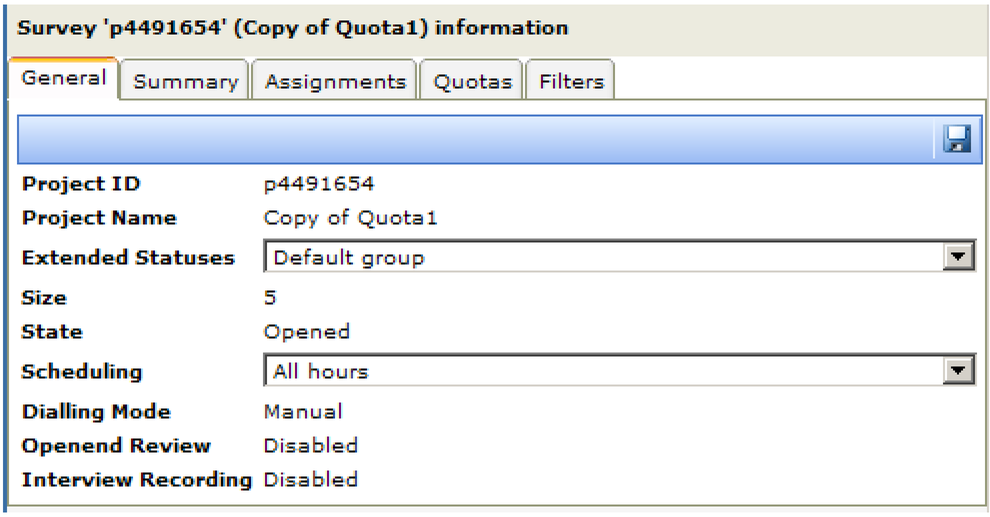



***Figure 45 Survey properties displayed in the bottom right frame***

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. 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. Survey properties are grouped using four tabs.

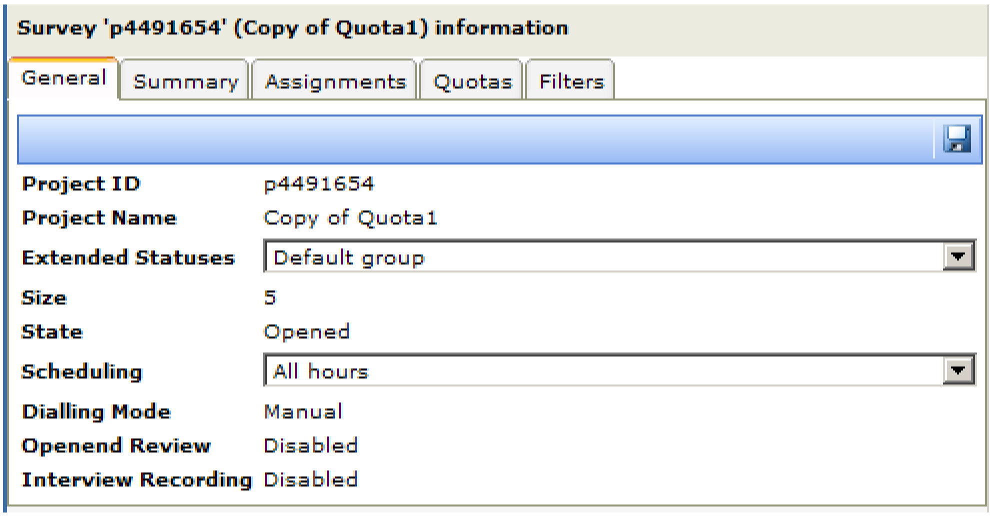



***Figure 46  Survey properties - General tab***

2. The general survey properties are contained in the General tab.

   The Project ID is the unique project identifier generated and assigned to the project when it is added to the system. It cannot be changed.

   The Project 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 Stuses group indicates the group of the extended statuses currently used with the selected survey.

   The Size field displays the current amount of sample records.

   The State field displays the current survey state. The Extended Status drop-down list 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 143. Every Extended Status group contains a number of Extended Status codes.

   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 Interview Recording field indicates whether or not the option of live interview recording is enabled. In case the interview recording option is enabled, all interviews for this survey are recorded 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 the recorded interview on page 66 for instructions on playing back the interview recording. Note that interview recording option is set up in the Confirmit Authoring module at the time the survey is added - please consult the Confirmit Authoring manual for details on setting up this option.

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

## 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. 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.

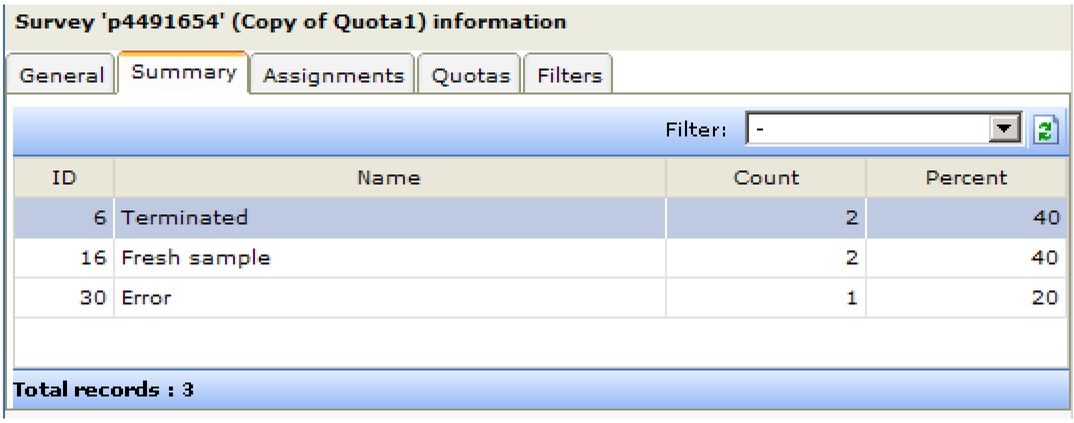



*Figure 47 Survey properties - Summary tab*

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

- ID – an interview 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.

2. 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.
3. 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 two 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 See "Viewing survey and interviewer assignments in the Survey Assignments window" on page 72 for this procedure description).

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

**To view and modify the survey assignments:**

1. 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.

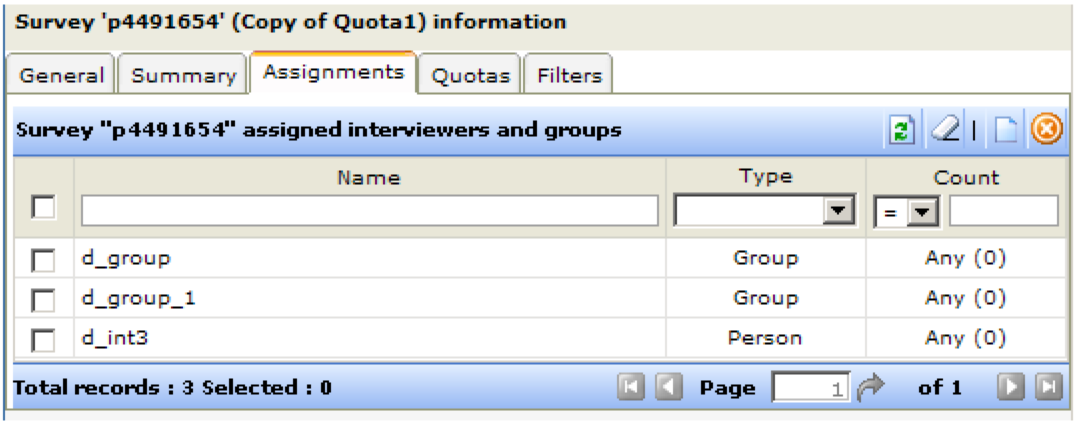



***Figure 48 Survey properties - Assignments tab***

2. List items are displayed in the grid. 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.
3. Since this tab lists persons and groups already assigned to the current survey interviews, 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 to de-assign the selected persons/groups. These persons/groups disappear from the list.
4. You can also instantly assign persons/groups to this survey.

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

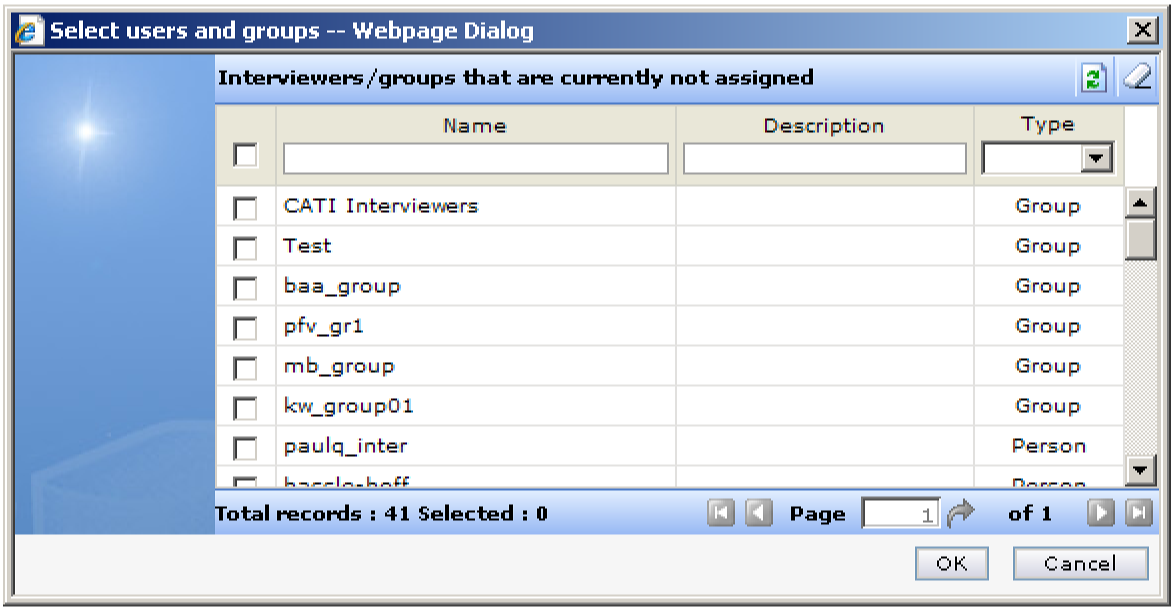



***Figure 49 Assign to survey dialog window***

This window contains a list of persons/groups that are available for assigning to the interviews.This table displays the persons/groups description in a separate column, and also indication of whether this item is a person, or a group. Check boxes in front of the required items and press OK in the bottom of the window.

You will notice that the bottom right frame in the CATI Supervisor window refreshes, and the selected persons/groups appear in the list of the assigned person/groups.

## 3.3.4 Viewing and modifying survey quota definitions

Quotas list can be specified for a survey. Quotas are specified 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 CATI Supervisor cannot change the quotas list, but he/she can view the quota list for the selected survey, and change the limit for any quota target in this list.

### To view and modifying survey quota definitions:

1. 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 top right frame toolbar.

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

   Change to the Quotas tab.

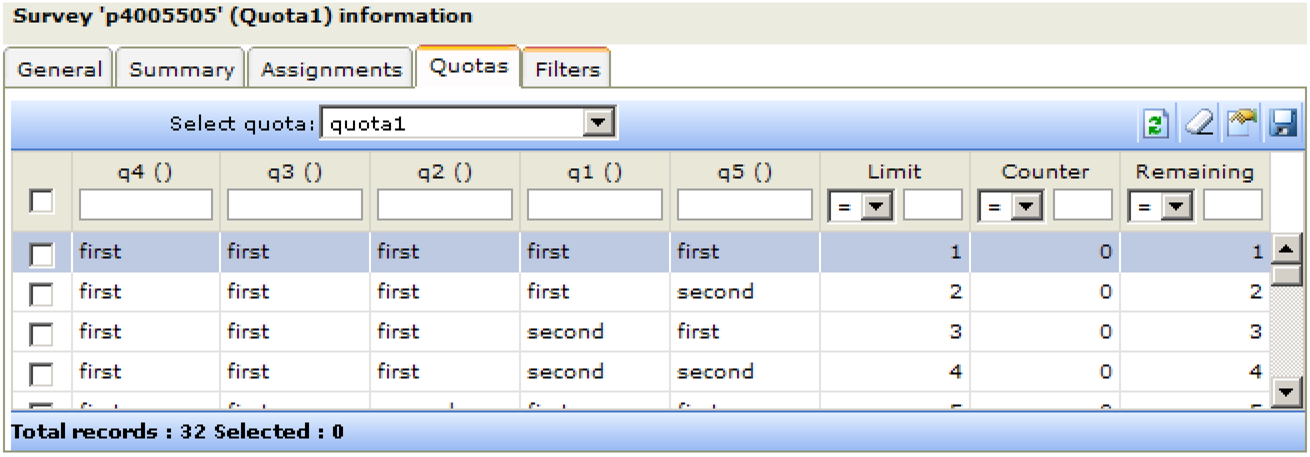



***Figure 50 Survey properties - Quotas tab***

2. To view the particular quota definition 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 targets defined for this quota.

   Particular quota target title is displayed in the column named after the interview question (there may be a number of such columns in the grid since one quota definition can include a number of targets for different questions). For each quota target the grid shows the limit (the threshold which should not be exceeded), the counter value (the current amount of completed calls for this target), and the remaining amount of calls (which can still be made for this target).

3. You can change the limit for any selected target, or simultaneously for all targets defined for the currently selected quota.
4. To change the quota target limit you should right-click the desired target in the grid and choose Change Limit from the context menu that appears. Or you can select the desired target in the grid, and press the Change limit button  in the frame toolbar. Alternatively you can select all targets and then choose any of the described actions to specify the same quota limit for all targets of the currently selected definition.
5. Any of these actions will display the Change Limit dialog window.

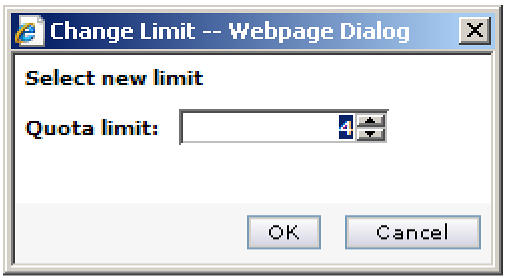



***Figure 51 Changing limit for a quota target***

Type in the new value in the Quota limit field, or use the spin control to change the displayed value. Press OK to choose the new limit value. The dialog window will close and the frame will be refreshed. The new limit value will be set for all selected targets.

Repeat the procedure for each quota target value you need to change.

6. Since the number of completed interviews changes in the course of the survey, press the Refresh button in the frame toolbar periodically to check the latest Counter value (the number of completed interviews).

7. If you make any changes to the quota definitions, do not forget to press the Save button in the bottom right frame toolbar to apply them. If you change the limit value the CATI Supervisor module will warn you by displaying the message in the frame toolbar - it will ask you to apply the changes you have made.

### 3.3.5 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 105 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 105).

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 in the right bottom frame (see Viewing and modifying general properties of a survey on page 38).
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.

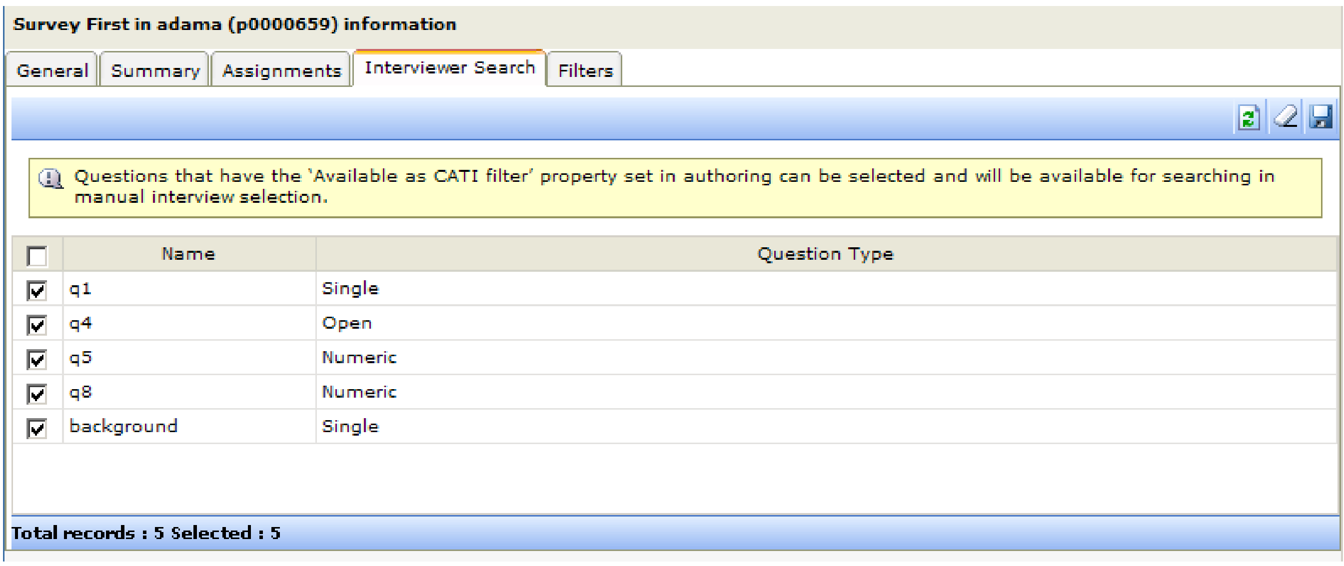



*Figure 52 Viewing the Interviewer Search tab contents*

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

## 3.3.6 Creating and modifying filters

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.

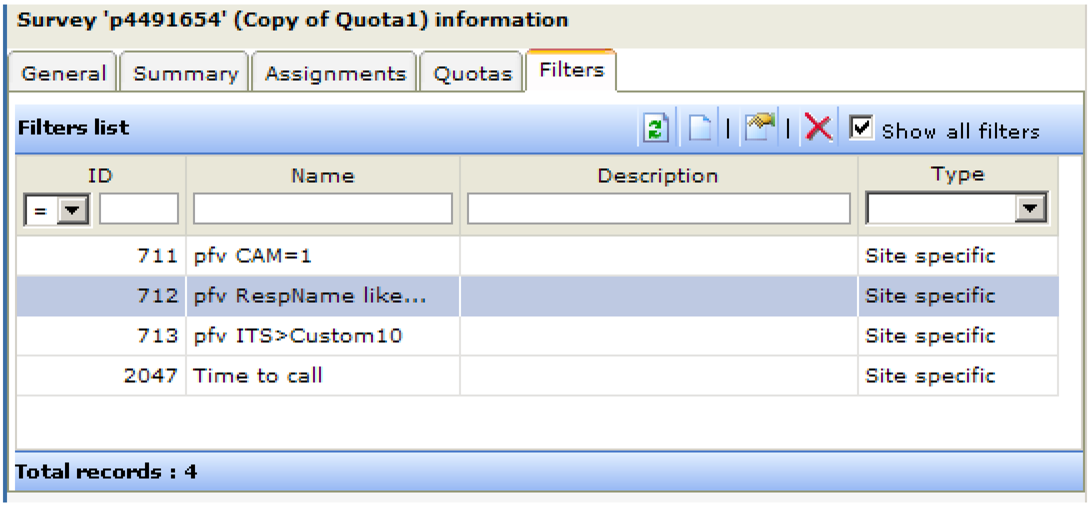



***Figure 53 Survey properties - Filters tab***

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 |
|  | 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 |

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.

### *3.3.6.1 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.

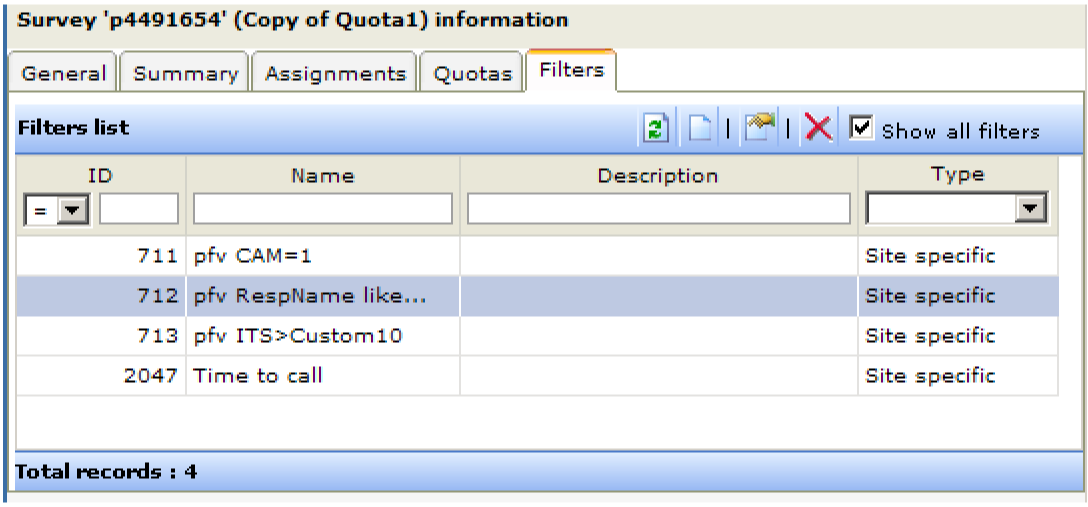



*Figure 54 Survey properties - Filters tab*

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 .

### 3.3.6.2 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.

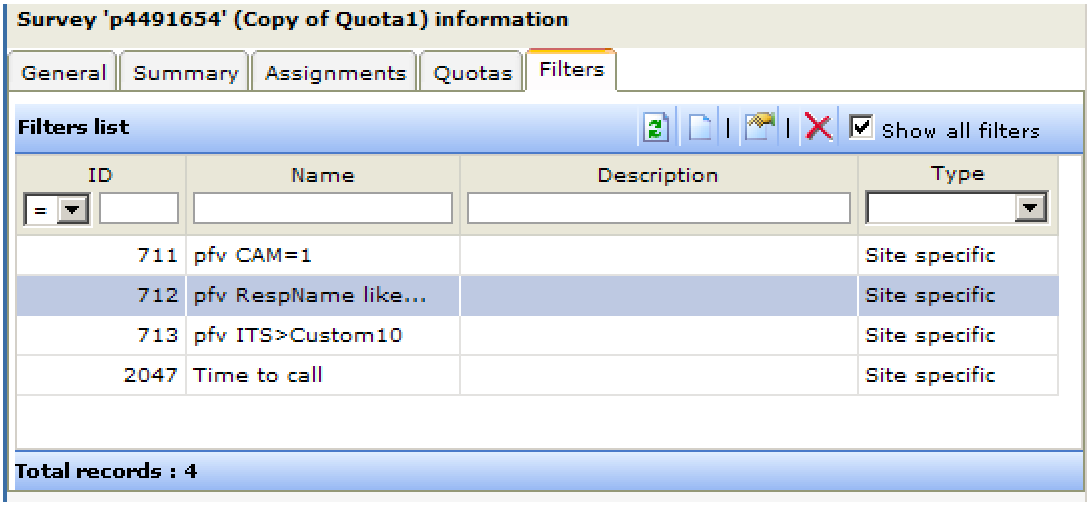



***Figure 55 Survey properties - Filters tab***

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.

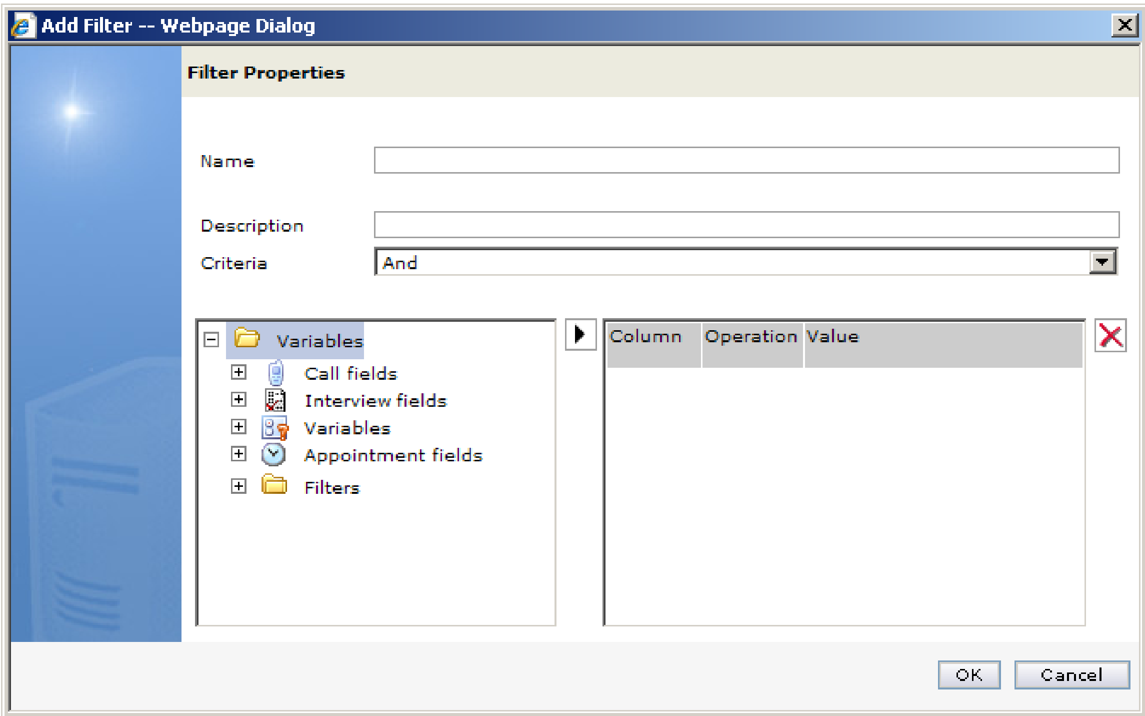



***Figure 56 The Filter dialog window (empty)***

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 – this drop-down box allows the user 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.

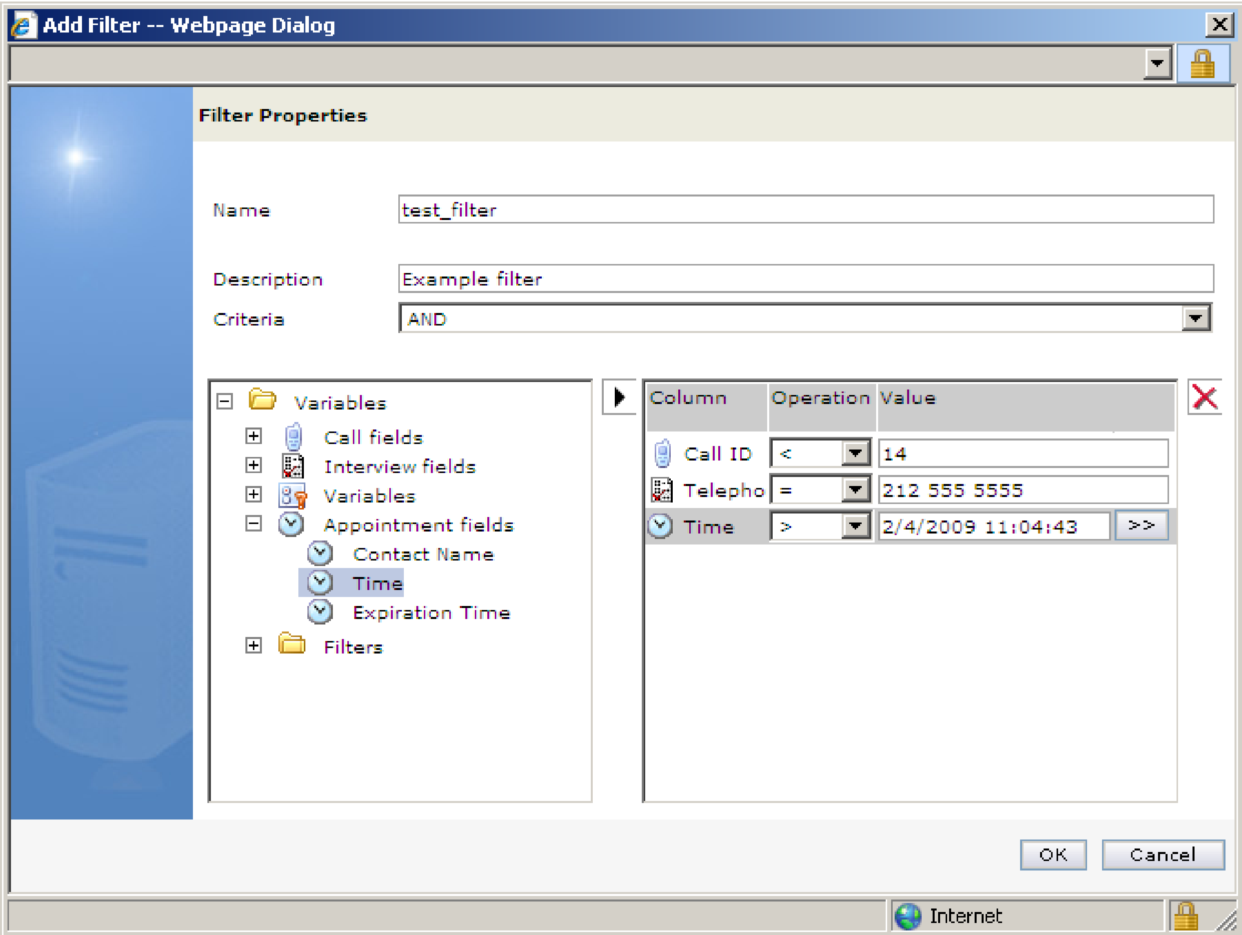



***Figure 57  The Filter dialog window containing filter parameters***

Select a variable (you can select only one variable at a time) and press the arrow button located between the panes 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 bottom pane. 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 dialog.

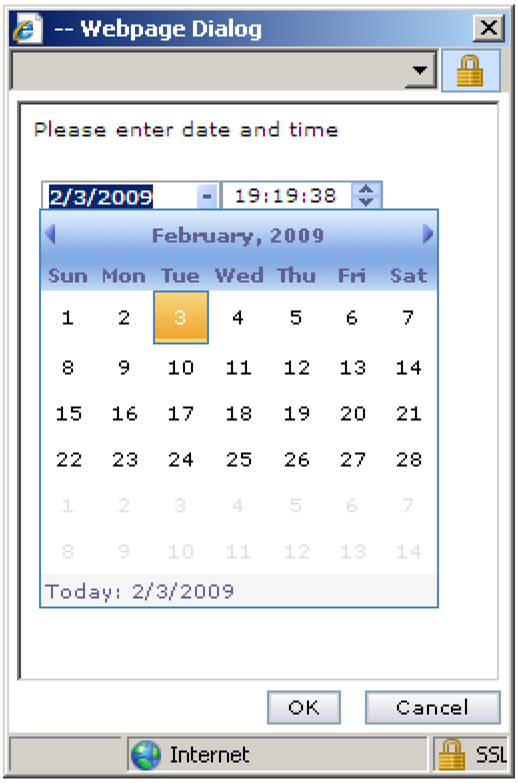



***Figure 58 The Calendar control form***

This dialog window contains the calendar with browsing controls and a clock with the spin controls. 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).

Using the dialog box 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;
- 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 are displayed in the upper left and right fields. These values 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 OK to create a filter. The created filter will appear in the filter list

### *3.3.6.3 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.

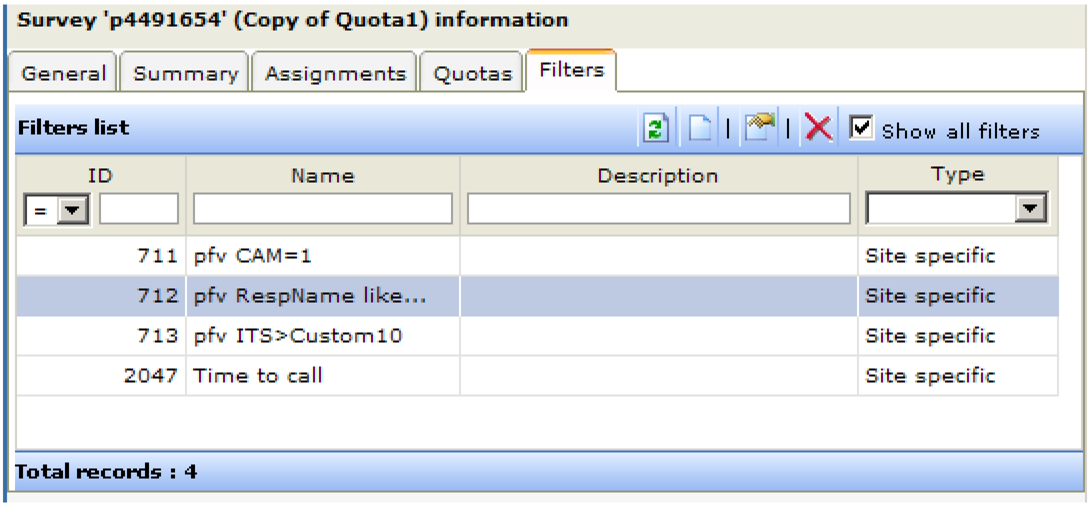



***Figure 59 Survey properties - Filters tab***

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.

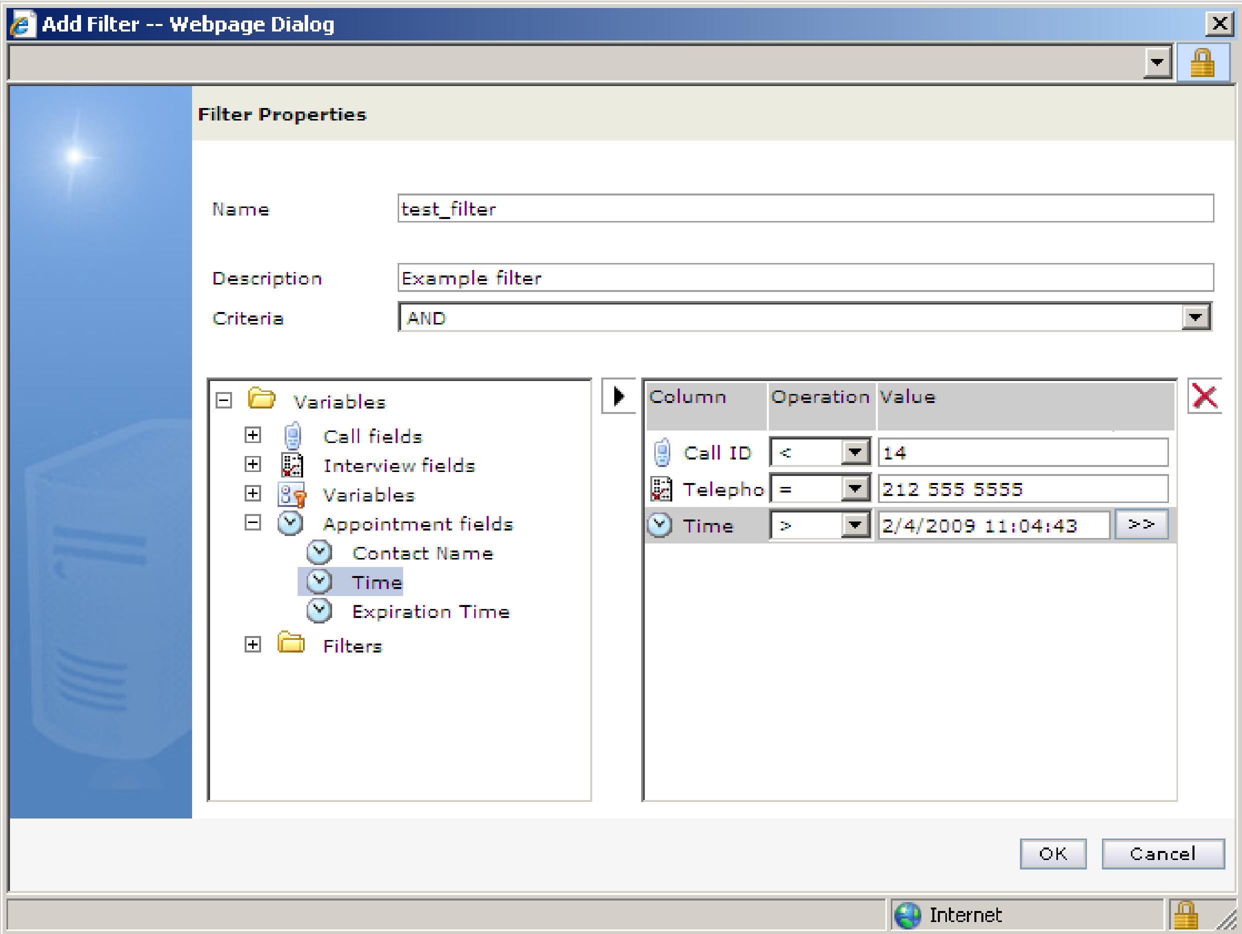



***Figure 60 The Filter dialog window containing filter parameters***

3. The process of filter parameters configuration is described in more detail in Creating a new filter on page 46. Refer to this description for instructions on modifying the filter properties.

### *3.3.6.4 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.

## 3.3.7 Call Management

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 itself from a single convenient interface – you can observe and modify the interview/call state and change different interview/call properties.

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 Please keep in mind that an "interview" and a "call" are different things though they constitute a single object in the CATI Supervisor module. A short explanation is that an interview is not always a call, but a call is always an interview. An "interview" becomes a "call" when its telephony properties pertaining to the technical side (telephony) are configured. In other words, when the set of properties pertaining to the "call" is added to the basic "interview" properties, the "interview" object becomes a "call", and when such property set is deleted, the "call" turns back into an "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.

### *3.3.7.1 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.

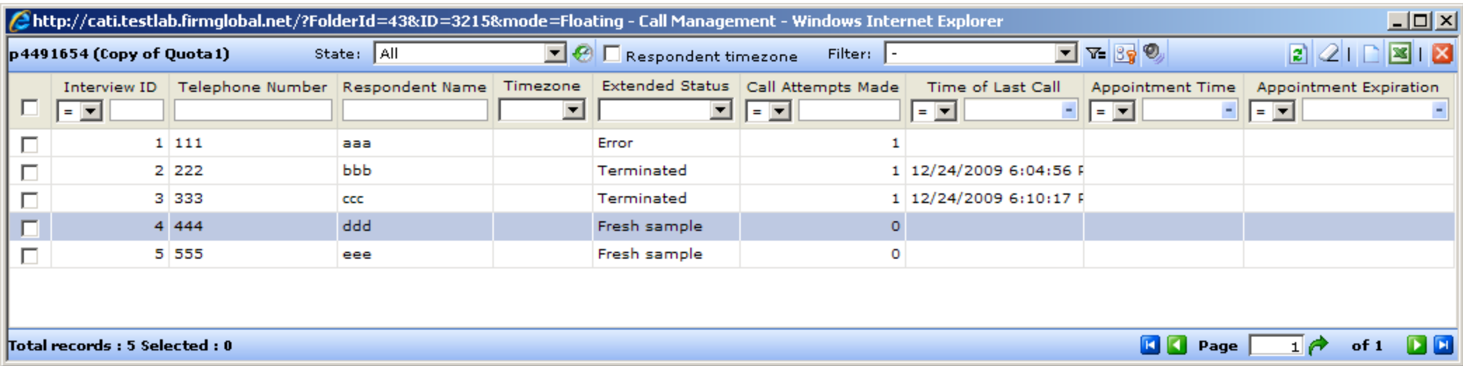



***Figure 61 The Call Management dialog window***

By default the list displays only calls in the "Active" state (this option can be selected in the State drop-down box above the list). 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 |
|  | Interview history | Displays data including all the latest changes in the call list. |
| Checkbox | Respondent timezone | When checked displays time considering the respondent time zone. |
| Drop-down list | Filter | Allows selection of an expression for filtering the displayed interviews/calls |
|  | Add filter | Allows creation of a new filter that will be available from the Filter drop-down list. |

| | | |
|---|---|---|
| | Add variable | 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 |
| | 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.

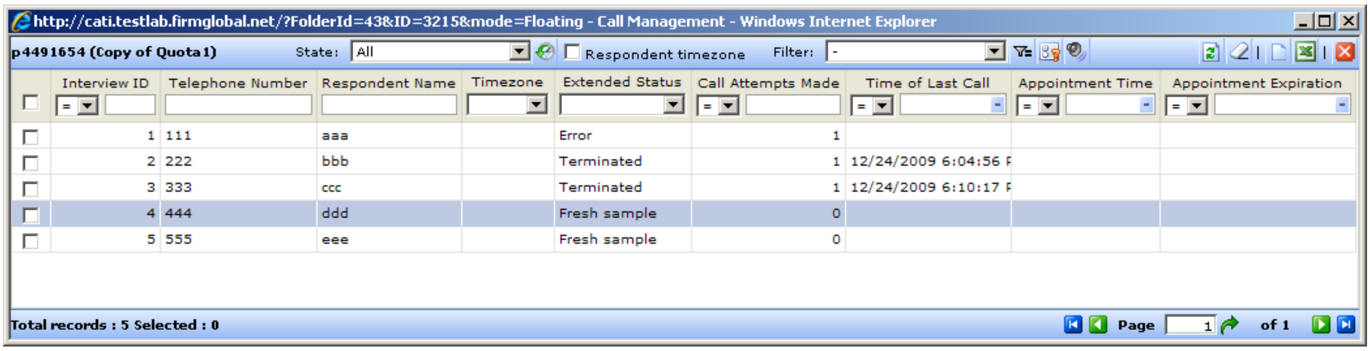



***Figure 62 The Call Management dialog window***

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.

   Since scheduling a call means configuring telephony related options of an interview, you can see that other options will show the list of calls that are currently in the chosen state – either “Active” (currently in queue for delivery), or “Scheduled” (waiting to be queued for delivery to an interviewer at the specified moment).

   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.

3. 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.

4. 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 – some interviews/calls can be deleted and new ones may be added.

### 3.3.7.2 Viewing the interview history

Interview history is a list of calls that were ever scheduled for the current interview.

The list of these calls cannot be modified; it can only be refreshed manually when required.

**To view the interview history:**

1. Select an interview in the table and choose History from the right click menu, or press the History button  on the toolbar.

   This will display the Interview History dialog window.

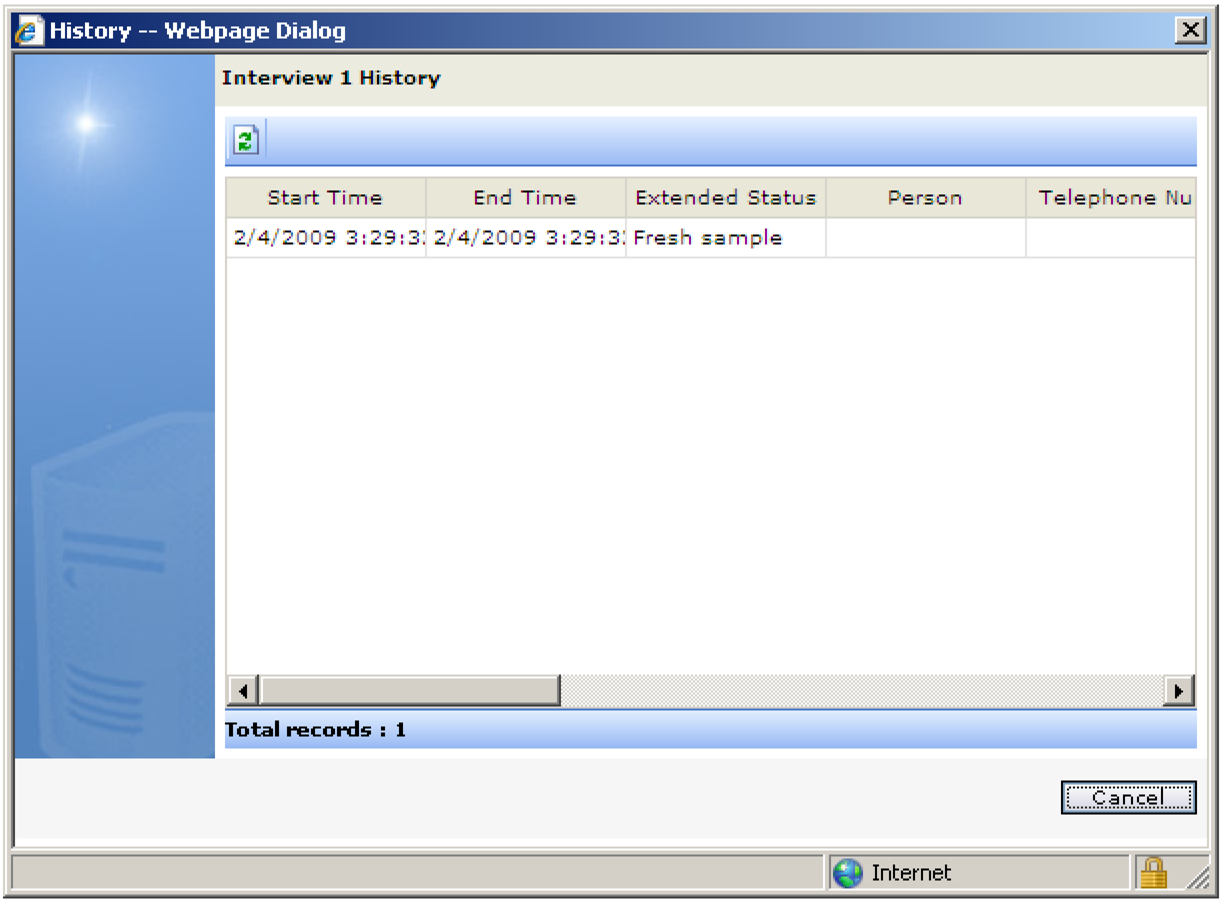



***Figure 63 The Interview History dialog window***

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

2. 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 (either made a phone call as the interviewer, or coded as the coder).
- *Telephone Number* – this is the respondent's telephone number (if known).
- *Respondent* – this is the respondent's name (if known).
- *Time zone* – this is the timezone of the call.
- *Time zone ID* – this is the timezone of the call
- *Full 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.
- *Gross Time*– this is the period of processing the call in the engine module.
- *Net Time* – this is the time of immediate interviewing.
- *Idle Time* – this is the time period between finish of the previous call and the start of the next scheduled call.
- *Contact name* – this is the respondent contact name (if known).
- *Time to call* – this is the time the call is due.

- *Time to expire* – this is the time when the call expires.

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

### *3.3.7.3 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 45 for instructions on how to perform these operations.

#### 3.3.7.3.1 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).

#### 3.3.7.3.2 Creating a new filter in the Call Management dialog window

**To create a filter:**

1. Press the Add Filter button on the toolbar.

   This will display the Add Filter dialog window.

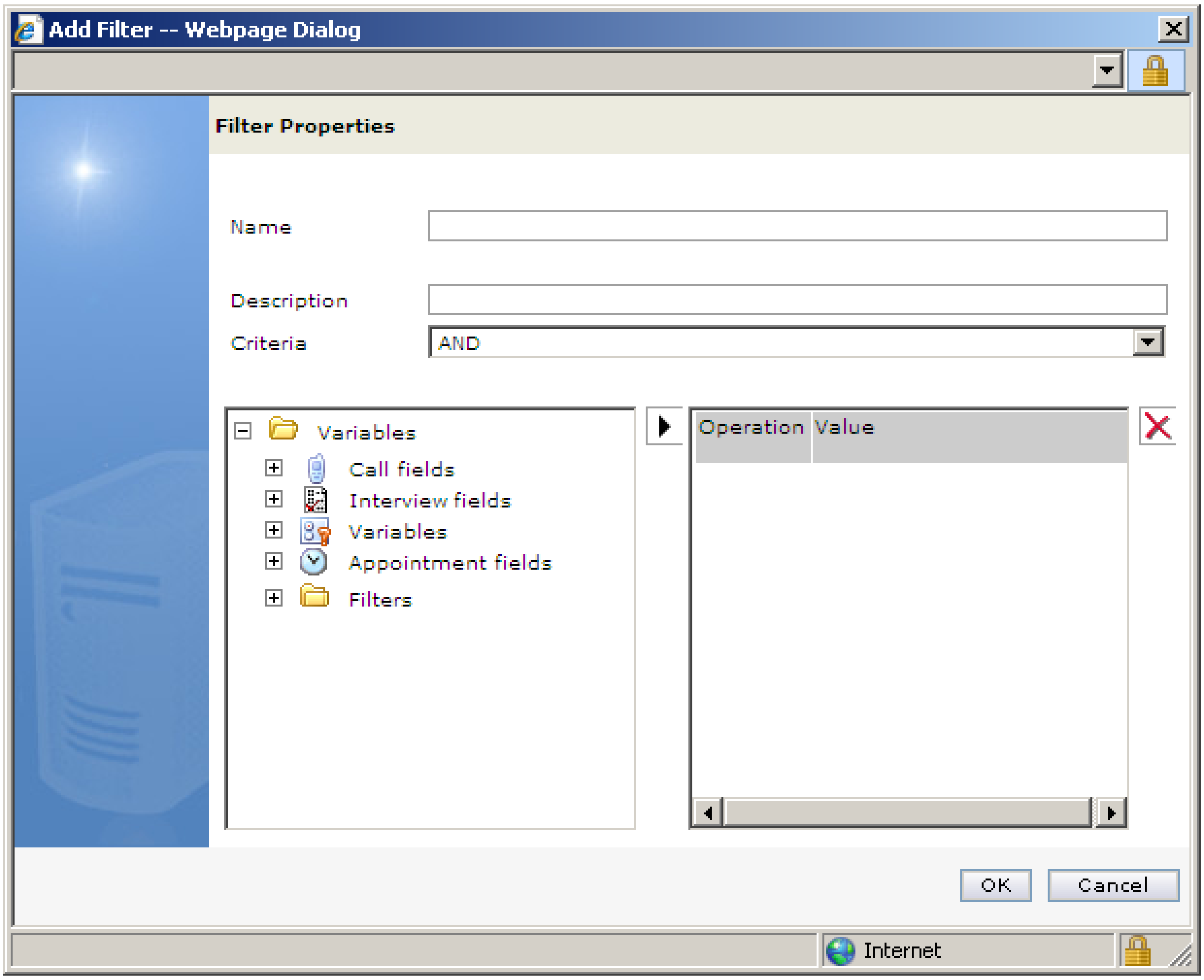



*Figure 64 The Filter dialog window (empty)*

2. Please refer to Creating a new filter on page 46 for detailed instructions on creating a new filter.

### 3.3.7.4 Displaying variable columns in the interview/call list

You can display extra columns in the interview/call list. These columns will show the particular variable values for each interview/call in the list. This can be of help when you need to filter interviews/calls according to variable values.

Variable columns are added with the help of the Select Variables dialog window.

**To display variable columns in the interview/call list:**

1. Press the Add Variable button on the toolbar.

   This will display the Select Variables dialog window.

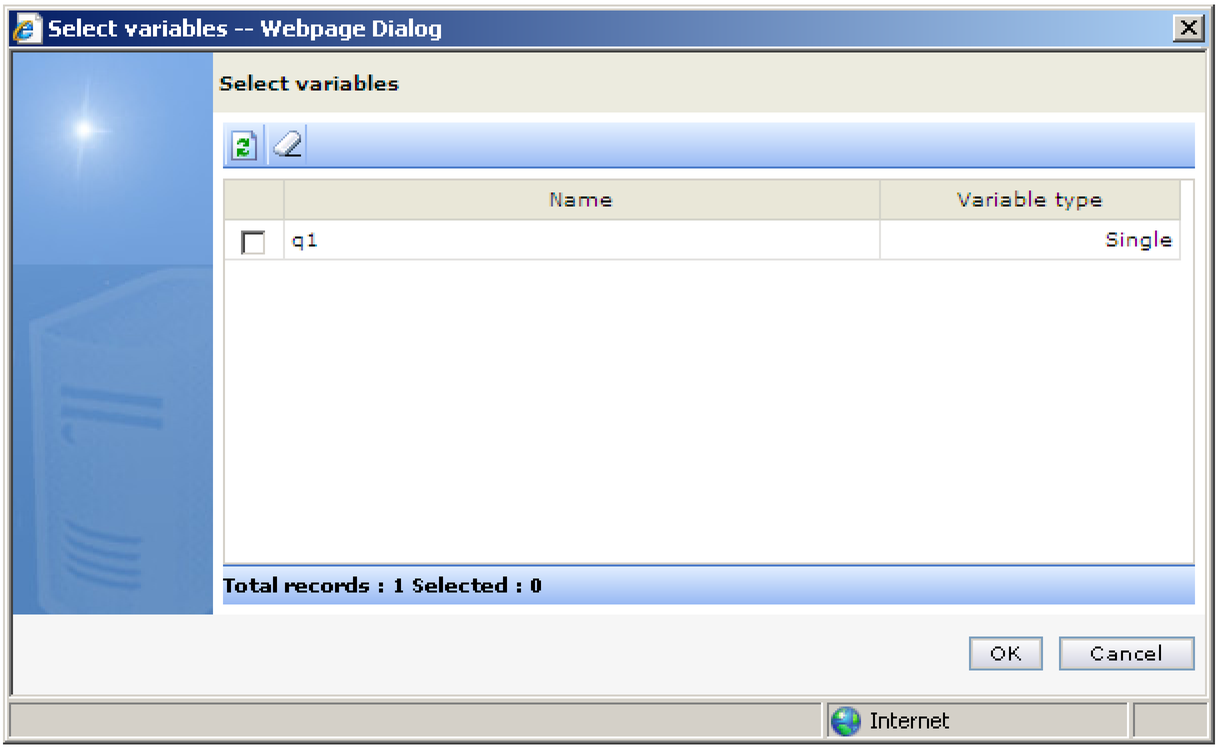



***Figure 65 Adding a variable column with the help of the Select Variables dialog window***

2. The list in this dialog window shows variables used with the current survey.
3. Grid columns display the variable name and type. Use this information to select the required variables – variables 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 variables at once.
5. Press the Refresh button above the grid to display the most recent variable list.
6. Press OK when you finish selecting variables. This will close the Select Variables dialog window and refresh the interview/call list in the Call Management window. Columns displaying the selected variable values are added to the interview/call list.

### *3.3.7.5 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.

### 3.3.7.5.1 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 only when the Call Management window displays the Scheduled call list.

You can also instantly modify separate call properties, please refer to the following topics – Changing a call priority on page 64, Changing the shift type for a call on page 64, Assigning a person/group to a call on page 65, Moving an interview/call on page 61.

**To edit a scheduled call:**

1. Open the survey containing the required call in the Call Management window (see See "Viewing the interview/call list" on page 52 for instructions).

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

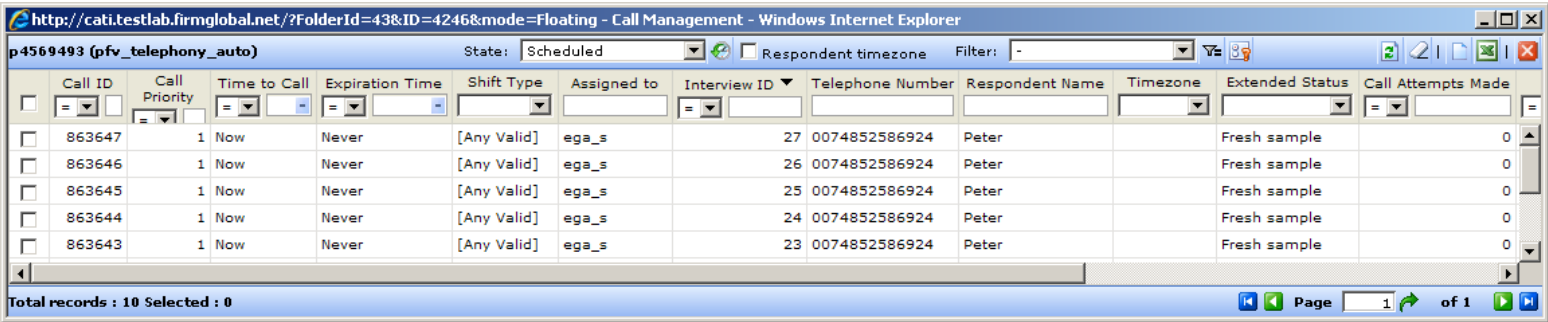



***Figure 66 Call Management dialog window displaying scheduled calls only***

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.

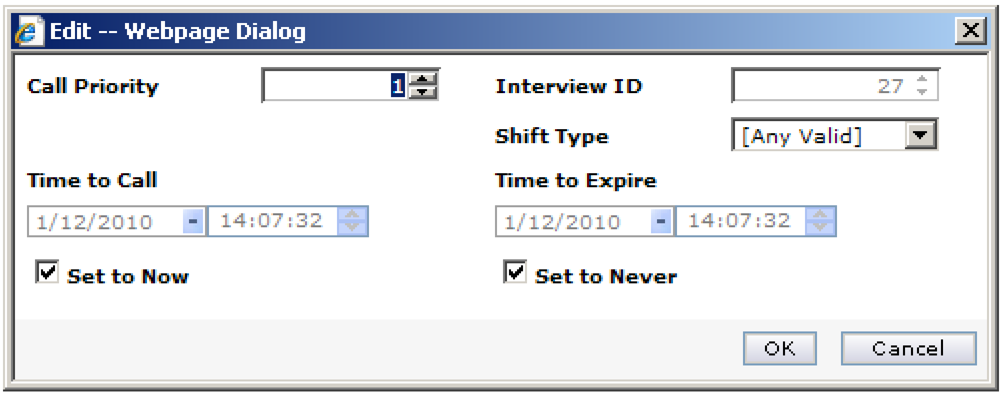



***Figure 67 Editing call properties using the Edit dialog window***

3. Using this dialog window interface you can modify the following call properties:
   - call priority

- shift type
- time to call
- time to expire

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. 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 OK 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 OK 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.

### 3.3.7.5.2 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 See "Viewing the interview/call list" on page 52 for instructions).

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

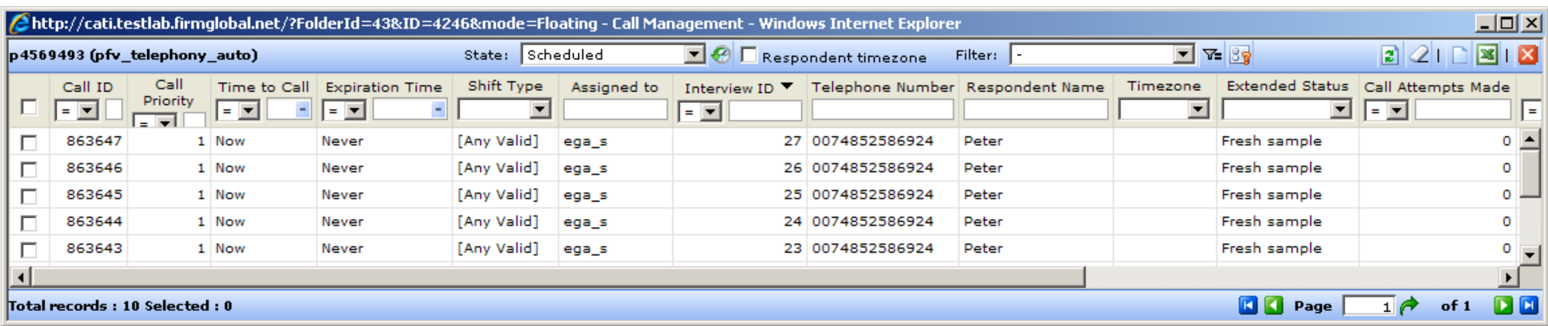



***Figure 68 Call Management dialog window displaying scheduled calls only***

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.

### 3.3.7.5.3 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.

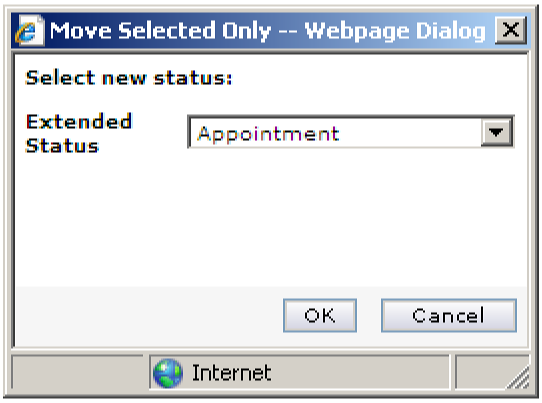



***Figure 69 Move Selected Interviews Only dialog window***

3. To move an interview into another Extended Status you should select a new Extended Status from the Extended Status drop-down list.
4. Press OK to confirm the change. This window will close, and the interview list in the Call Management dialog window will be refreshed.

### 3.3.7.5.4 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 an already scheduled call, 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.

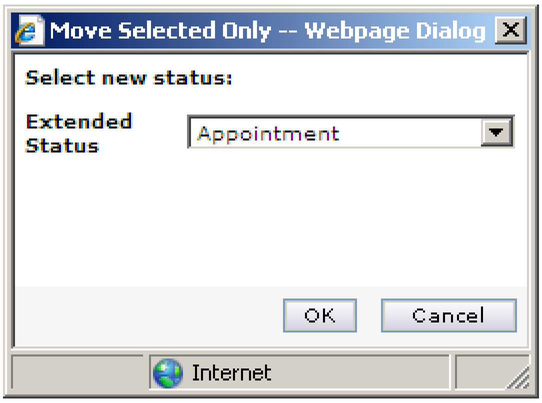



***Figure 70 The Move and Reschedule Interviews dialog window***

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.
4. Press OK 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.

### 3.3.7.5.5 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.

   Choosing the command will display the appropriate Activate… dialog window.

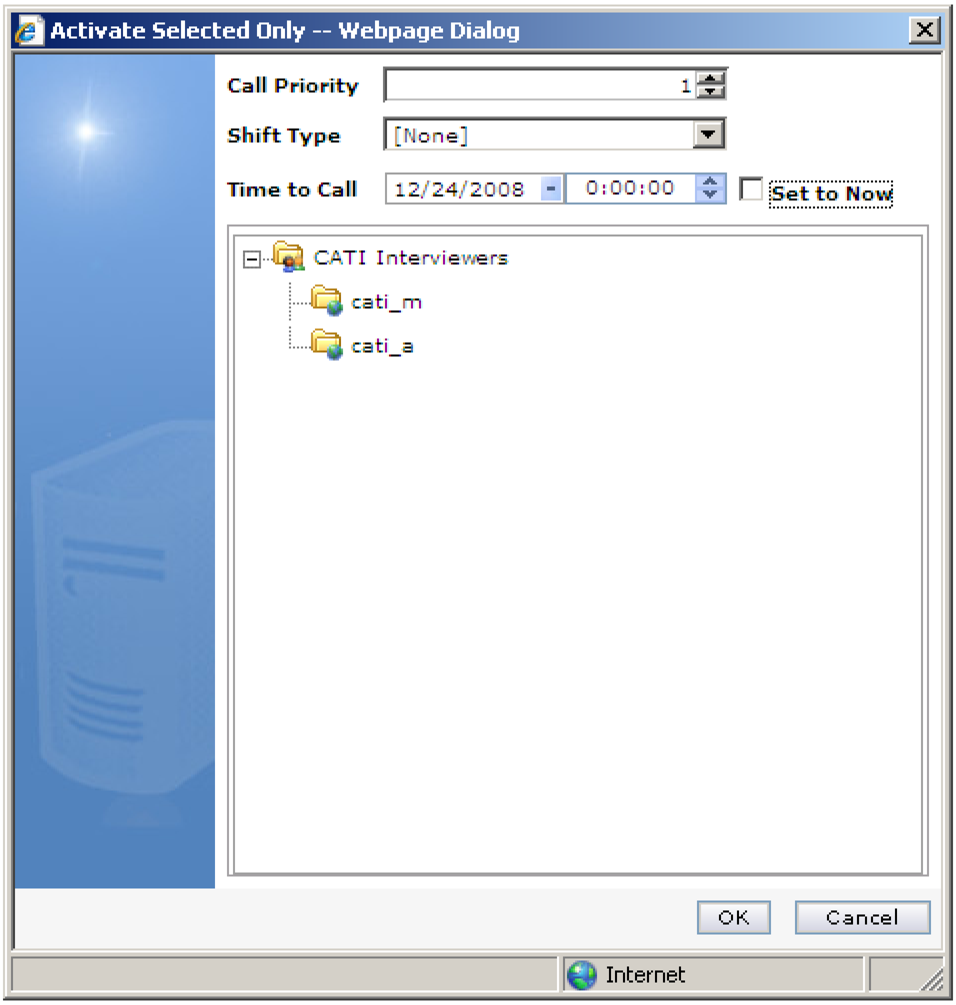



***Figure 71 Activate the Interview dialog window***

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
4. The priority of a call is modifed with the help of the Call Priority spinbox – press the Up or Down arrows in the spinbox to increase or decrease the value by one.
5. The Interview ID cannot be modified using this dialog window interface. 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 starting the call delivery the moment OK is pressed.
8. The last field contains the hierarchical tree representing the interviewer group structure.

   You can select any combination of interviewers/interviewer groups in this tree. Use the Shift key to create a multiple selection.

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

### 3.3.7.5.6 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.

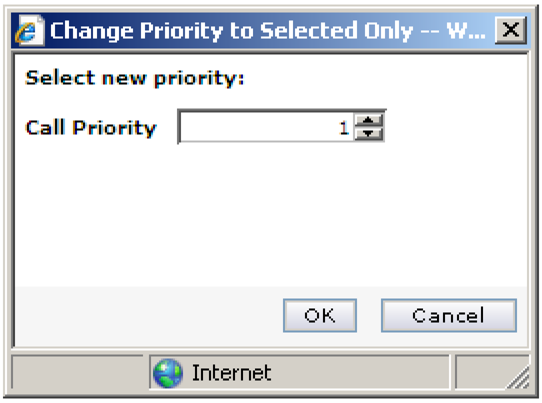



***Figure 72 Change Priority of the Interview dialog window***

4. To change a call priority you should select a new value using the Call Priority spinbox.
5. Press OK 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.

### 3.3.7.5.7 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.

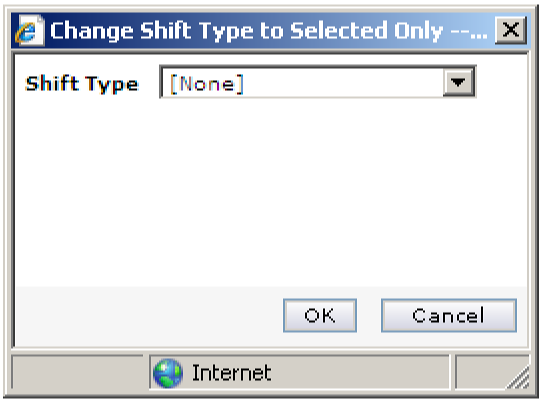



*Figure 73 Change Shift Type dialog window*

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.

### 3.3.7.5.8 Assigning a person/group to a call

You have an option of instantly assigning a person/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.

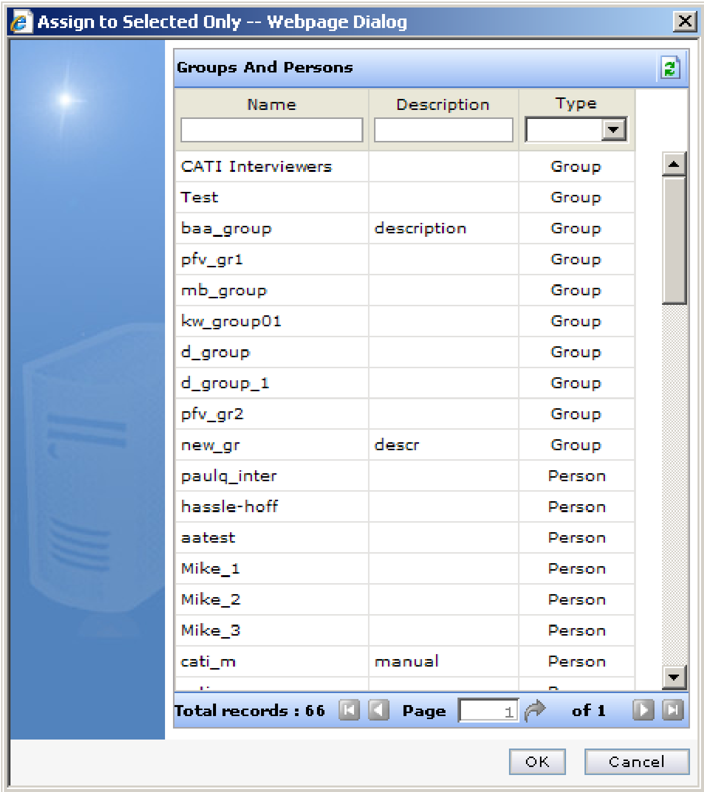



*Figure 74 Assign to a Call dialog window*

4. To assign an interviewer/interviewer group to a call you should select the required interviewer/interviewer group from a list of Groups and Persons.
5. Press OK 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.

### *3.3.7.6 Recording and playing back the recorded interview*

The CATI Supervisor module allows recording the interviewing process. In CATI Supervisor this function is called the Deferred monitoring. Please refer to See "Deferred monitoring in CATI Supervisor" on page 135 for complete description of this function. Initial steps required to enable the deferred monitoring in CATI Supervisor should be performed in Confirmit Authoring module - please 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.

Depending on the currently enabled dialer system (this can be either Magnetic North or TCI/ProTS) interviews are recorded either in the streaming audio format (files with the ASF extension), or in the Windows audio format (files with the WAV extension). So, the Magnetic North dialer system produces streaming audio tracks, which can only be played back from the server, but cannot be saved locally, while the TCI/ProTS dialer system provides audio files in the Windows audio format, which can be played back from the server and also saved locally. 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. Check if the device which is used for playback of audio recordings is properly attached to the computer and is functional.
3. 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.

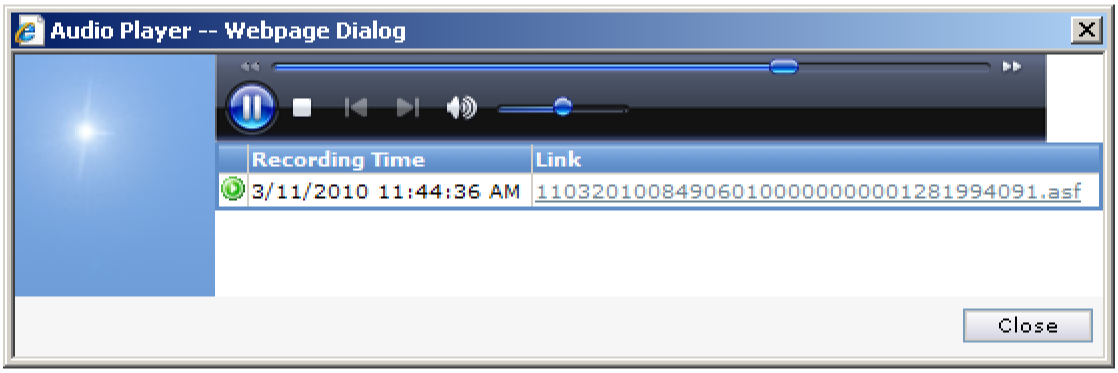



***Figure 75 Playing back the streaming audio track from the recorded interview***

The row below the standard audio player control elements displays 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.

The picture above shows the streaming audio file, which can only be played from the server. Clicking this link will start playback of the file in the default audio player application.

The picture below shows links to files in the Windows audio format. Clicking any of these links will display the standard Windows dialog prompting you to choose between saving the selected file locally, or playing it in the default audio player application.

Note that the picture contains two links, and two audio files are available for one interview. This means that the interview was paused, and then continued. Each interview chunk in case the interview was paused and then continued is stored as a separate audio file.

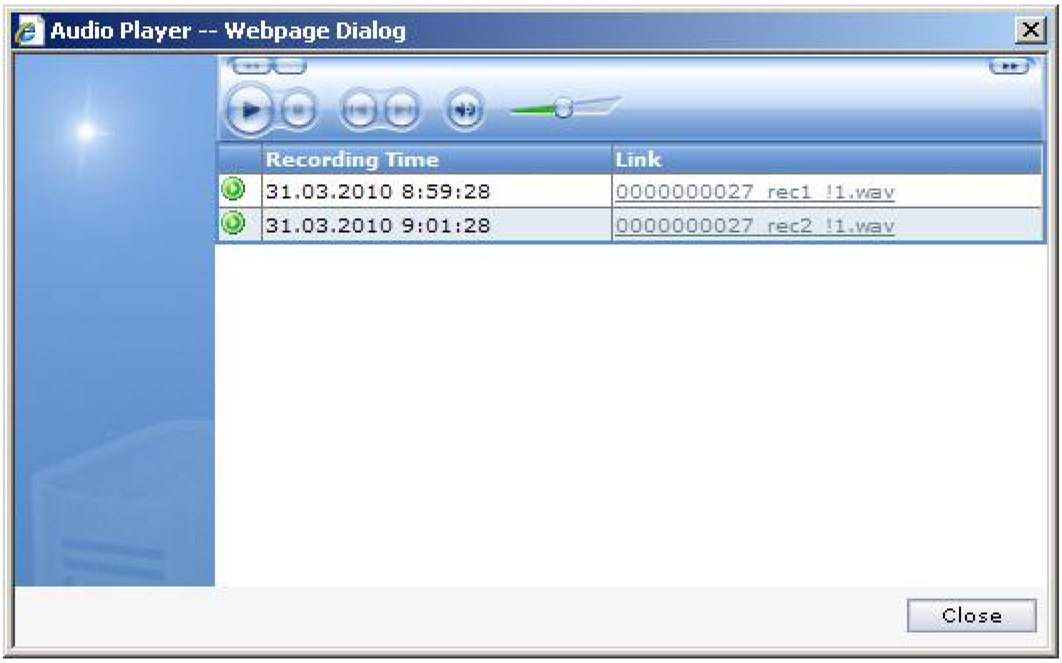



*Figure 76 Audio Player utility displaying audio files in the Windows audio format*

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

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 to play back the audio track from another interview.

## 3.3.8 Survey assignments

You, as the Supervisor, can assign users responsible for performing interviewing within a specific survey or define certain surveys for specific users (see See "Making assignments in the Survey Assignments dialog window" on page 68 for instructions).

You can also de-assign surveys or persons using a similar routine (see See "Performing De-assign operation in the Survey Assignments dialog window" on page 71 for instructions).

The CATI Supervisor provides the Survey Assignments dialog window to perform these operations. This dialog window allows for different combinations of surveys and persons/groups to be selected for making assignments and de-assignments.

Once the assignment is made, it can be viewed from the Surveys List for each survey in the bottom right frame with the help of the View operation (see Viewing and modifying the survey assignments on page 40 for instructions). Please note that this view mode also allows modifying person/group assignments, but for the current survey only. The same is true for a de-assignment operation.

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. See See "Viewing survey and interviewer assignments in the Survey Assignments window" on page 72 for this procedure description.

### *3.3.8.1 Making assignments in the Survey Assignments dialog window*

**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.

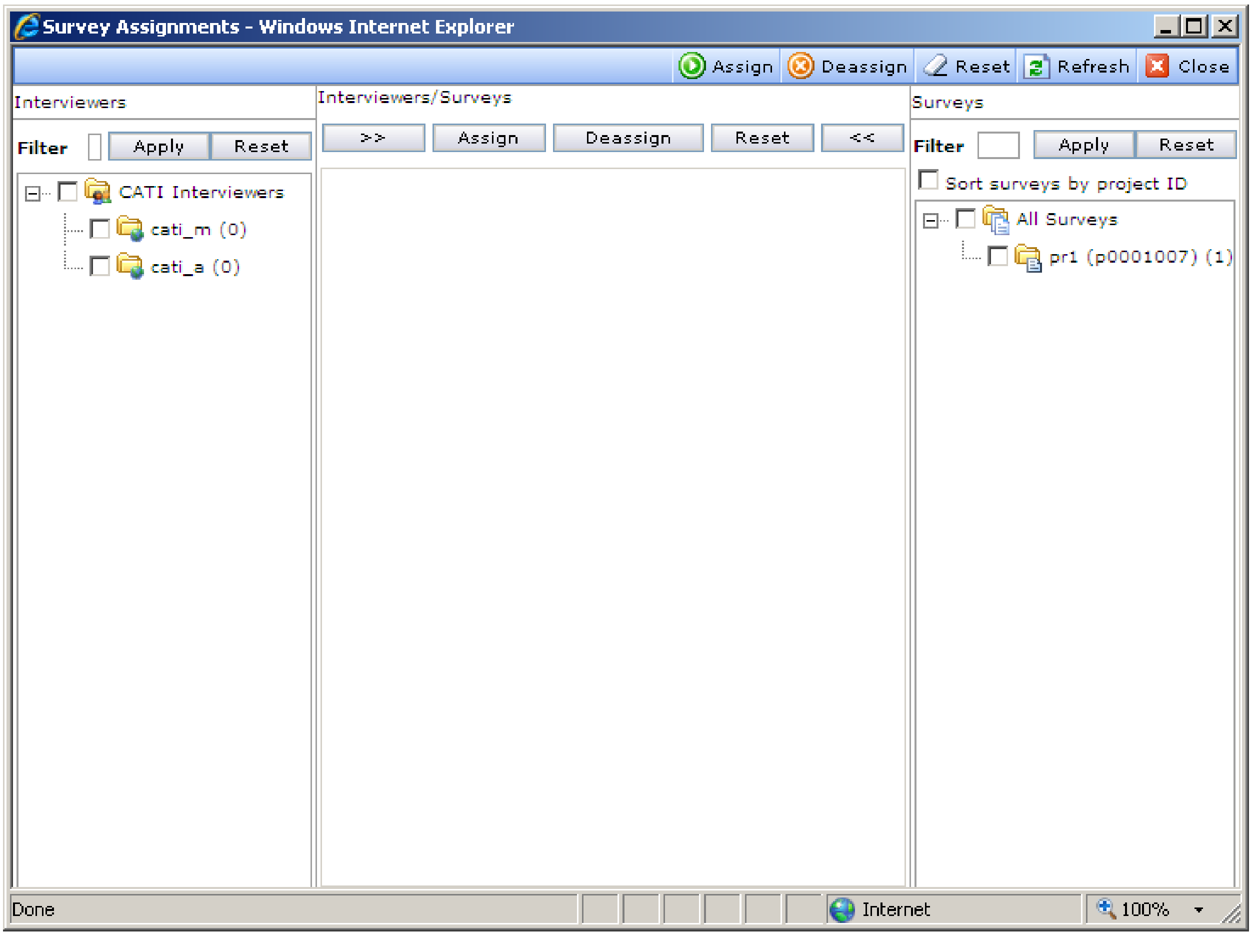



***Figure 77  The Survey Assignments dialog window***

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

   The panes include:

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

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

   Interviewers and interviewer groups displayed in the tree in the left pane 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 pane 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) pane 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) pane allows the required surveys or groups of surveys to be selected. This pane uses the same controls as the left (Interviewers) pane.

7. The middle (Interviewers/Surveys) pane 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 pane. First select the required interviewers or surveys in the appropriate pane. Press the arrow button next to the left side of the pane >> to populate the middle pane with the list of interviewers selected for assigning surveys to them. Or press the arrow button next to the right side of the pane << to populate the middle pane 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 pane, and when the selection is formed press the arrow button on the left side of the middle pane. The middle pane is then refreshed, its name changes to Interviewers and the selected interviewer list is displayed in the middle pane.

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

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

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

   If the Assign operation is performed successfully, the dialog box informing you of the operation completion is displayed. This dialog box tells you how many surveys were assigned or de-assigned in the course of the operation. Pressing OK in this dialog box closes it, and simultaneously clears the middle pane.

9. If assigning survey(s) to interviewer(s), you should first select survey(s) in the right pane, then, when the selection is formed, press the arrow button on the right side of the middle pane. The name of the middle pane changes to Surveys and the selected survey list is displayed in the middle pane.

   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 pane 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 panes.

Next you should simply drag the selected items from one pane to another (the direction has no importance), point the cursor on any of the selected items in the opposite pane 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 40 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 See "Viewing survey and interviewer assignments in the Survey Assignments window" on page 72 for this procedure description.).

### *3.3.8.2 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 40 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.

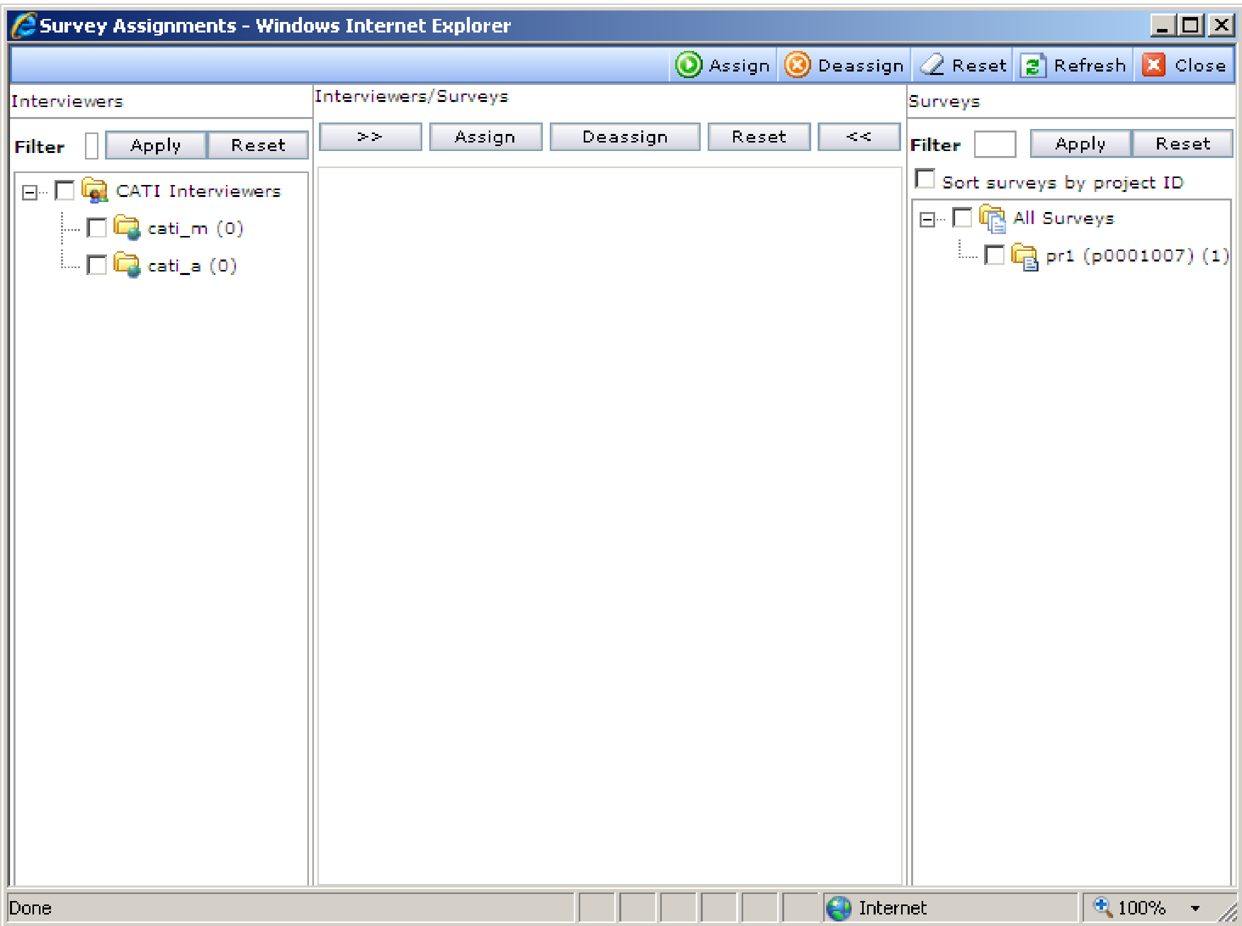



*Figure 78 The Survey Assignments dialog window*

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 68 section.

3. Please follow the procedure described in Making assignments in the Survey Assignments dialog window on page 68 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 pane, 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 pane.

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 40 for instructions).

### *3.3.8.3 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.

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 See "Viewing and modifying the interviewer properties" on page 25 for instructions), or using the Call Management window (when Scheduled or Active calls are listed in that window - see See "Viewing the interview/call list" on page 52 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 See "Viewing the survey list" on page 36 for details), press the Survey Assignments button  in the top right frame toolbar.

   This will display the Survey Assignments dialog window.

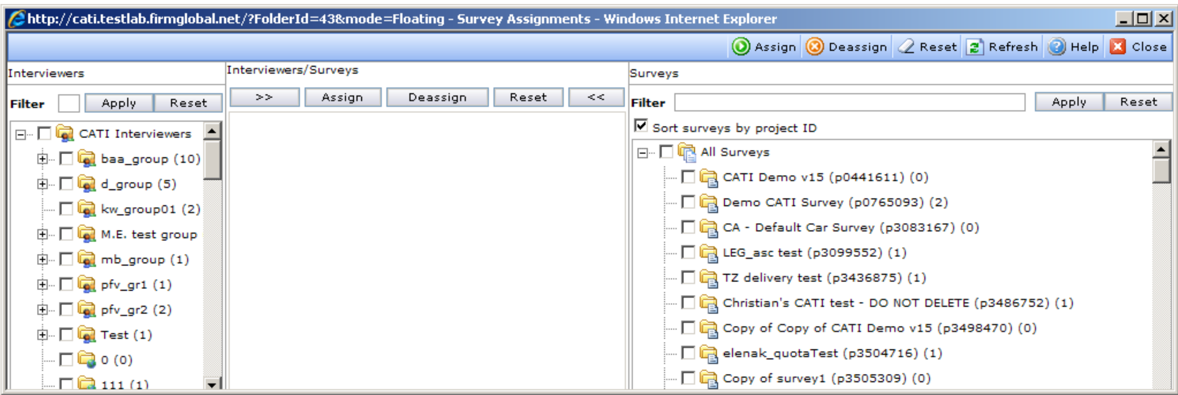



*Figure 79 Survey Assignments dialog window*

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;

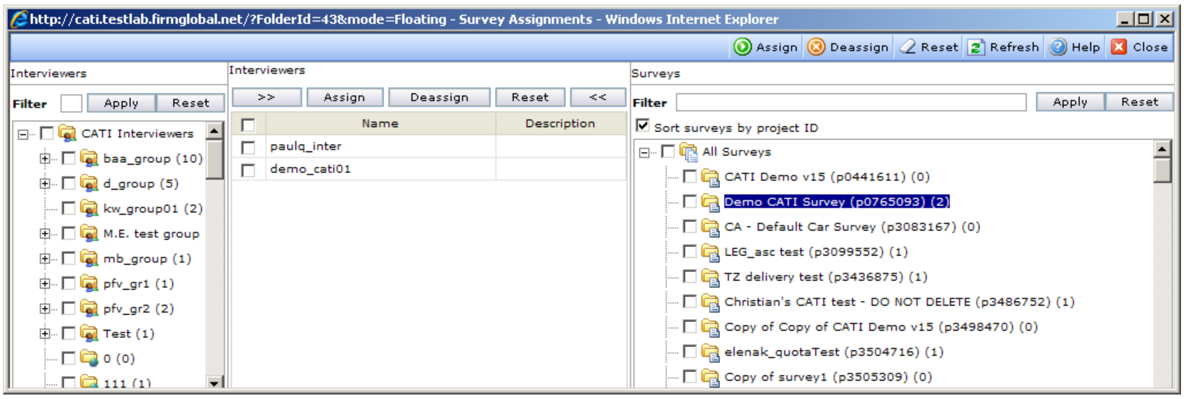


*Figure 80 Survey Assignments dialog window showing assignments made for a survey*

- 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.

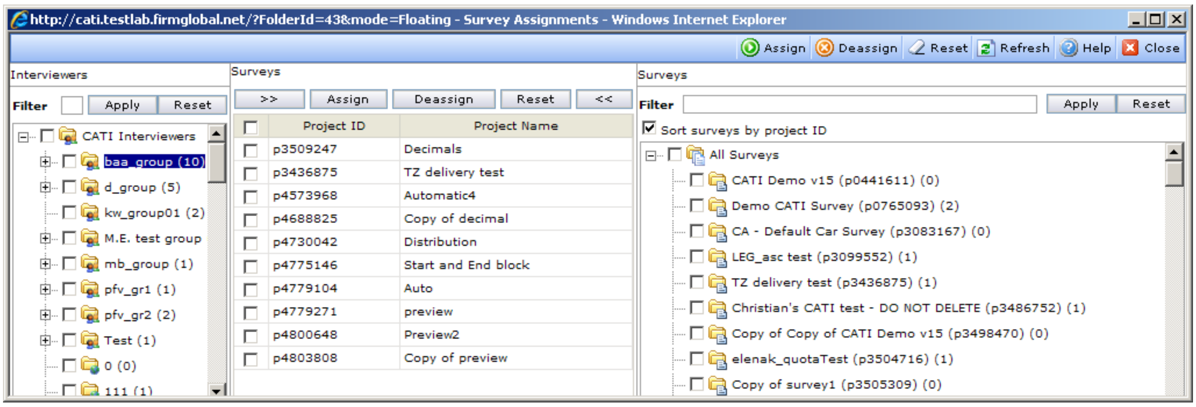


*Figure 81 Survey Assignments dialog window showing assignments made for an interviewer/interviewer group*

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

## 3.3.9 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:

Datetime – UTC datetime timestamp for the time the call finished.

ProjectID – The Project ID (Pxxxxx) for the survey.

InterviewID – The interview ID (respondent ID) for the call attempt made.

InterviewerID – The numeric ID of the CATI interviewer that made the call.

TelephoneNumber – The telephone number of the respondent.

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

Duration – The duration of the call made in seconds.

Data in the file are sorted by ProjectID and then by datetime 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.
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 is displayed then.

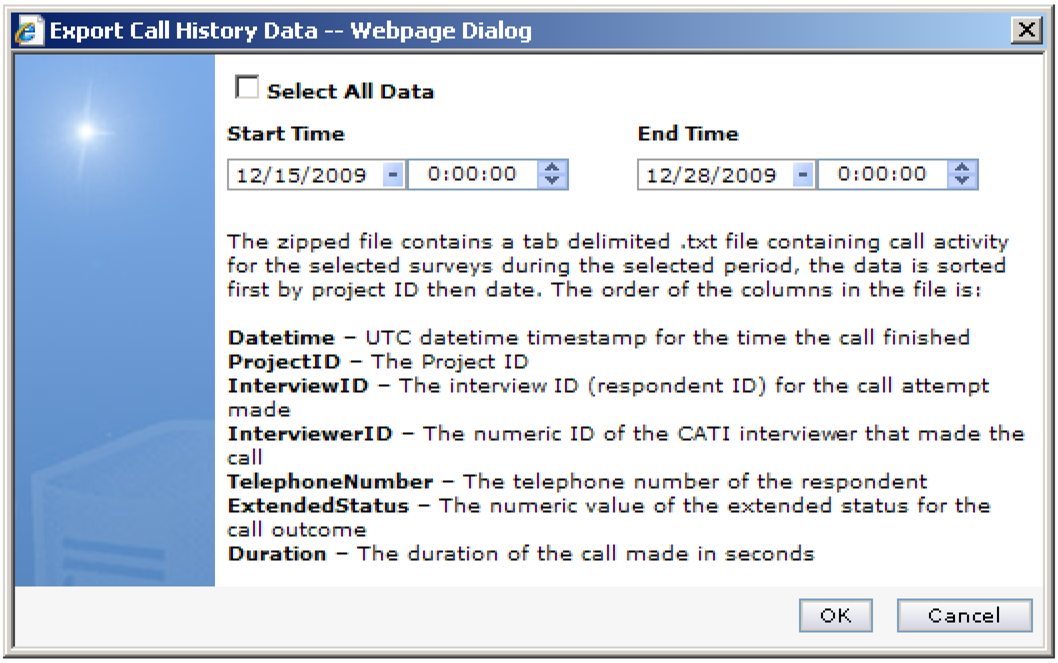



***Figure 82  Selecting options for the call history data export***

4. You can either choose to export data pertaining to all calls that have been made in the course of all the selected surveys (by choosing the Select All Data option at the top of this dialog window), 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.

5. Below the fields there is a description of the resulting file format.
6. Press OK to start the export, or Cancel to terminate the procedure.
7. When OK is pressed, the export procedure is initiated, and in a short while a 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 as a text file in the text editor, which is used by your system to open plain text files.

# 4 Scheduling Scripts

## 4.1 What is a Scheduling Script

A Scheduling Script is made up of a number of rules which are applied to the finished call. This script is typically used to reschedule the finished call according to this set of rules.

A scheduling script can consist of:

- **Shift types** - types of shifts used in the scheduling scripts
- **Shifts** – describes interviewing hours during a week
- **Rules** – it describes subrules that trigger recalls
- **Subrules** – describes actions which should be performed for a specific subrule
- **Actions** - actions which should be performed for a call
- **Time Zones** – set of timezones which are used in the scheduling script
- **Custom script** (optional) – custom script can be used to perform specific actions not available via the GUI interface

Scheduling scripts can be 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.

## 4.2 Working with 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.

### 4.2.1 Displaying the list of the Scheduling Scripts

**To display the list of the Scheduling Scripts:**

1. Click the Scheduling button in the vertical Navigation menu (which is displayed in the left frame)
2. In the list that unfolds below:
   - Either doubleclick 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 the Scheduling scripts currently stored in the database in the top right frame.

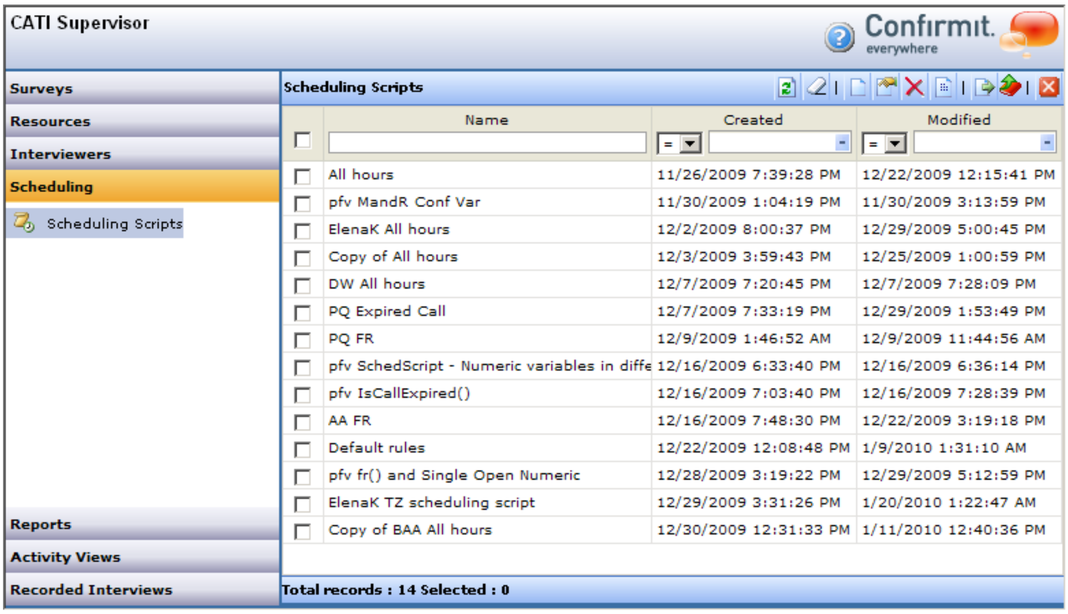



***Figure 83  The Scheduling Script list***

3. All operations are performed on objects you select in this list.

## 4.2.2 Browsing the scheduling script list

The left part of the bottom bar in the top right frame 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.

The user can browse the grid pages (if objects 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.

## 4.2.3 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.

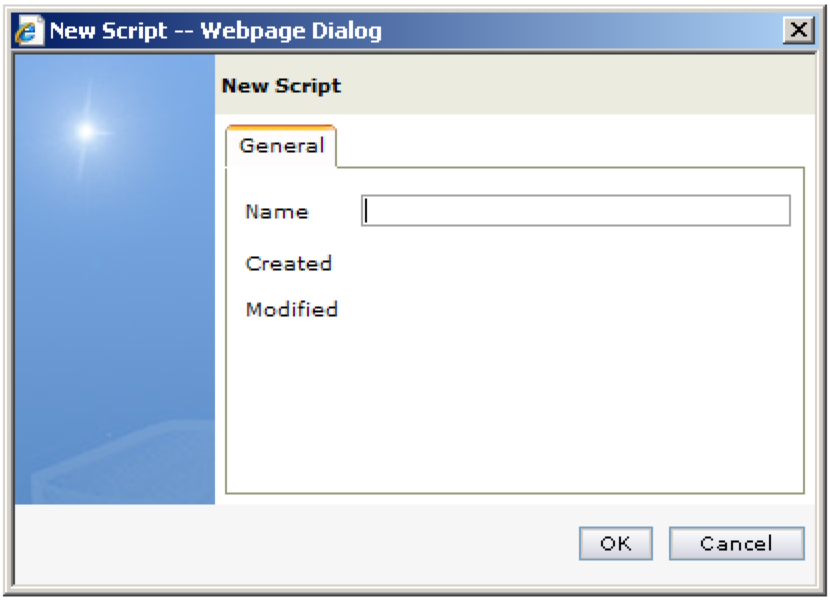



*Figure 84 The New Script dialog window*

You can specify the script name in the Name field in the General tab.

3. Press OK to add a new script to the scheduling script list.
4. The scheduling script you create this way needs to be configured. To configure a scheduling script you will have to modify its settings - see See "Modifying the existing Scheduling script settings" on page 78 for instructions on configuring the scheduling script.

## 4.2.4 Modifying properties of an existing Scheduling script

**To modify properties of an existing Scheduling Script:**

1. You can view and modify properties of any of the scripts displayed in the list in the top right frame. You can either right-click the script and choose Script properties from the shortcut menu, or select the required script in the grid and press the Script properties button  on the toolbar.

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

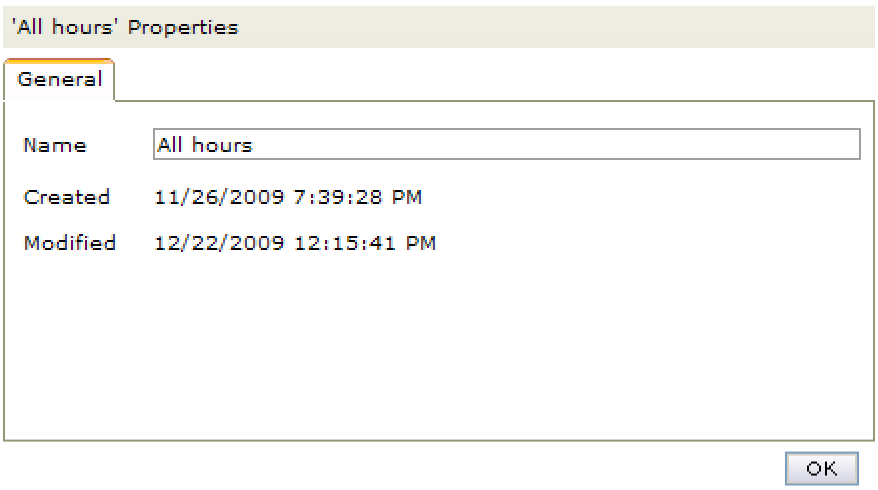



*Figure 85 Script properties - right bottom frame*

The General tab displays the current script parameters. You can modify the script name in the Name field.

2. Press OK to save changes.

### 4.2.5 Viewing the existing Scheduling script settings

**To view the existing Scheduling script settings:**

1. The user can view and modify settings of any of the scripts displayed in the list in the top right frame. The user can either right-click the script 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.

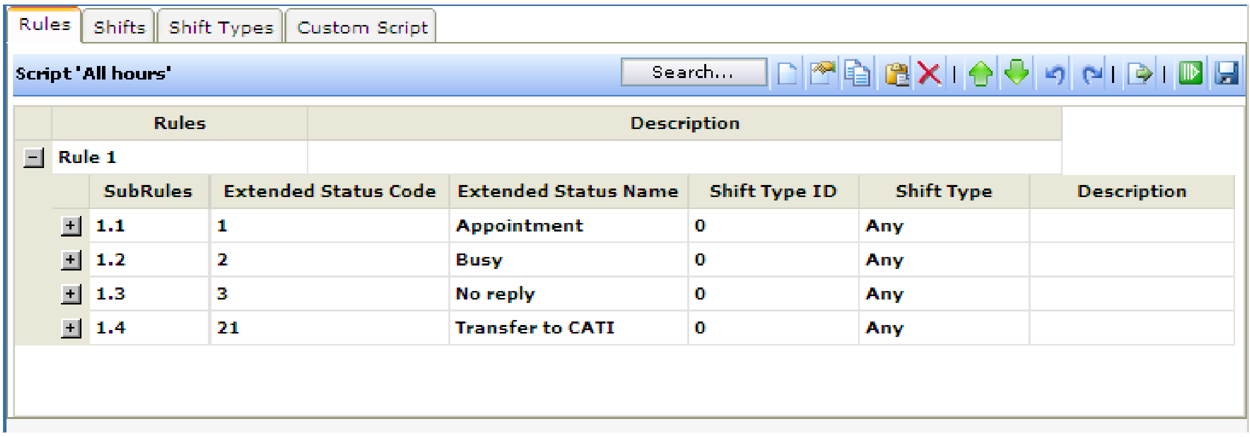



***Figure 86  Viewing the script settings in the bottom right frame***

2. The bottom right frame uses tabbed interface to display the scheduling script settings. There are four tabs that you can use to view and modify the script settings:
   - Rules – this tab is used for specifying rules to be applied to the call;
   - Shifts – this tab is used for specifying shifts during which the script should be active;
   - Shift types – this tab is used for specifying shift types (shift types are required for correct specification of the shifts);
   - 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 the custom scheduling script code on page 87 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.

### 4.2.6 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 will happen 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 146 and Configuring the Active Timezone list on page 148 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.

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.

### *4.2.6.1 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 previous page for details), choose the Shift Types tab in the bottom right frame. This will display the list of existing shift and exclusion types.

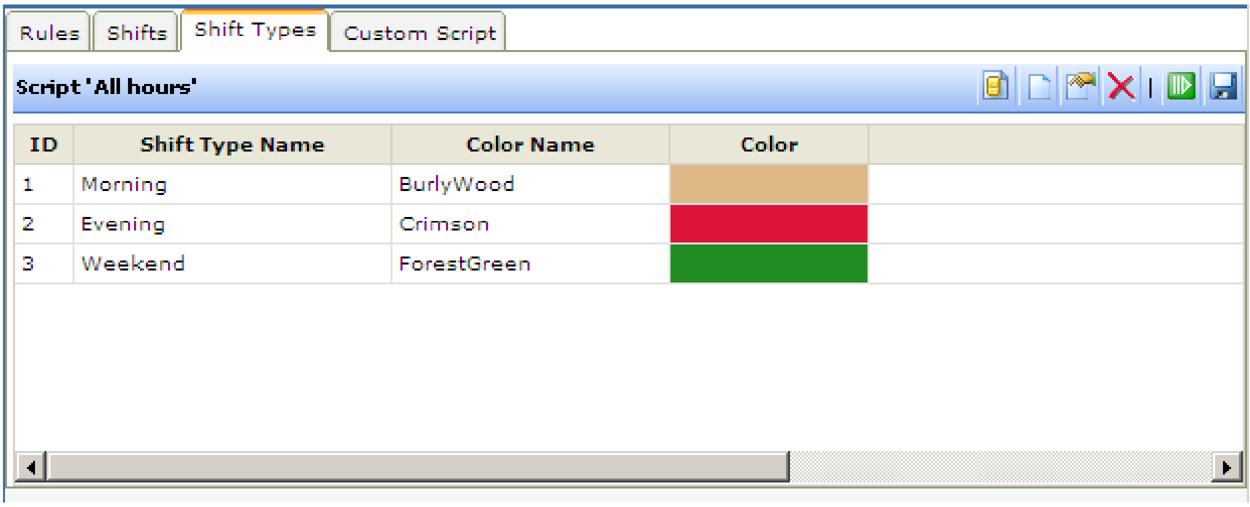



***Figure 87 Creating shift and exclusion types using the ShiftTypes tab***

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.

   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 88 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 See "Specifying shifts and exclusions for use with the scheduling script" on page 81 for instructions).

### 4.2.6.2 Specifying shifts and exclusions for use with the scheduling script

Please note that you can specify shifts and exclusions only of the existing type. To add more shift (exclusion) types please refer to Specifying the shift (exclusion) type on page 79.

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

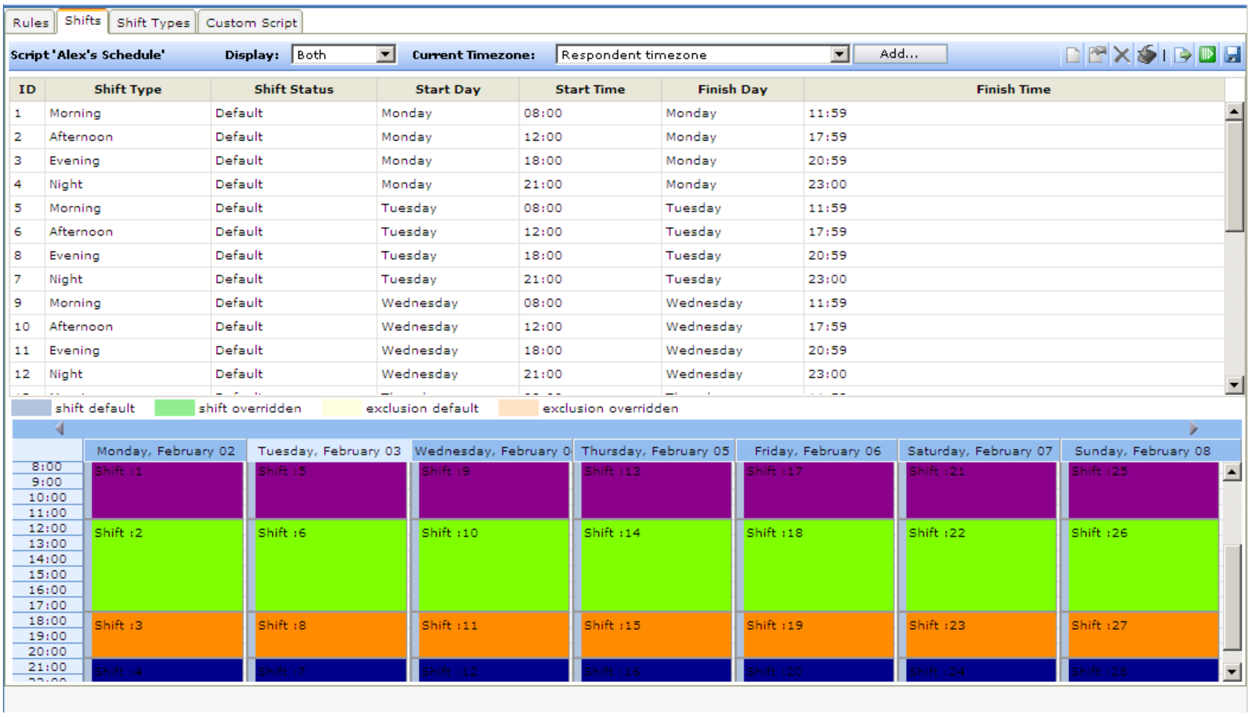



*Figure 89 Specifying shifts and exclusions using the Shifts tab*

2. The Shifts tab displays the existing shift and/or exclusion list. This depends on what mode you select using the Display drop-down box 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 below the list presents listed items visually – it uses colors assigned to the appropriate shift types and also highlights the current date and the default and overridden shifts and exclusions (as shown in the legend presented right above the diagram).

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.

   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.

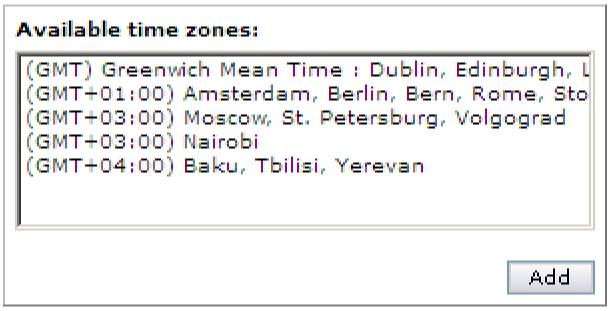



***Figure 90 Adding a time zone***

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 147.

You can set the current time zone as the default time zone. It will then be used as default each time you add a new shift or exclusion. To do so you should choose the required time zone in the Current time zone drop-down box and then press the Set Default button  on the toolbar.

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.

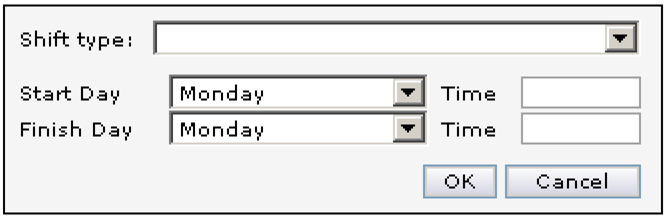



***Figure 91 Adding a new shift***

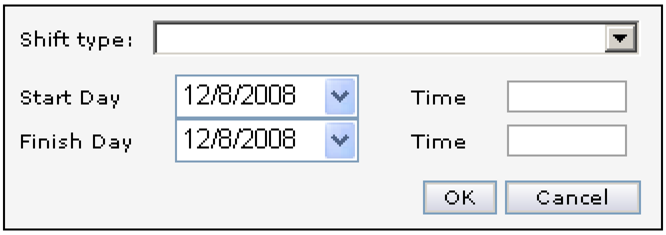



***Figure 92 Adding a new exclusion***

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 end day of the week and enter the end time. For an exclusion select the start date (pressing the down arrow in the field that displays the calendar control) and the start time (in HH:MM format), then enter the end date and the end 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. 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 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.

7. You can proceed with specifying scheduling rules using the Rules tab then.

### *4.2.6.3 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 (which tells what interview state during which shift will trigger the script), and one action for this subrule (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.

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

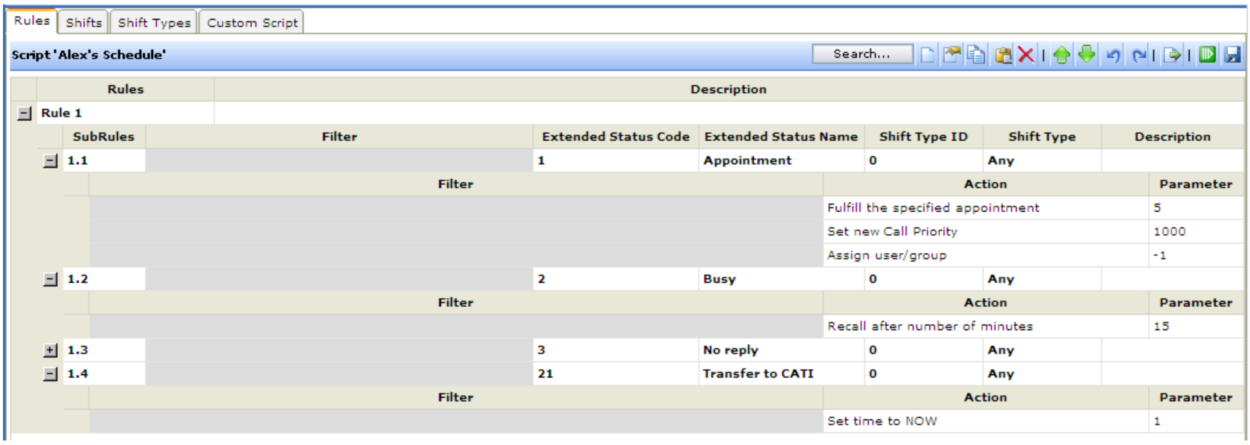



***Figure 93 Viewing the scheduling rule list for the selected scheduling script***

   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.

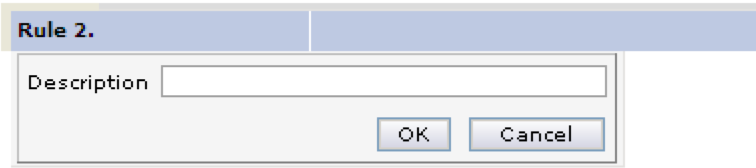



***Figure 94 Adding a new scheduling rule***

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.

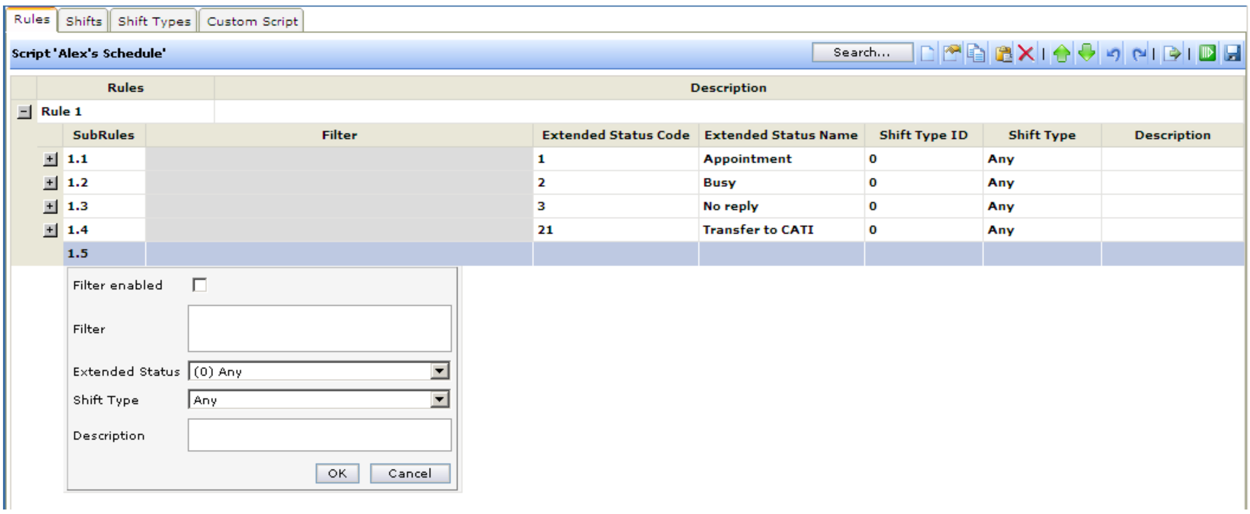



***Figure 95 Adding a new subrule***

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.

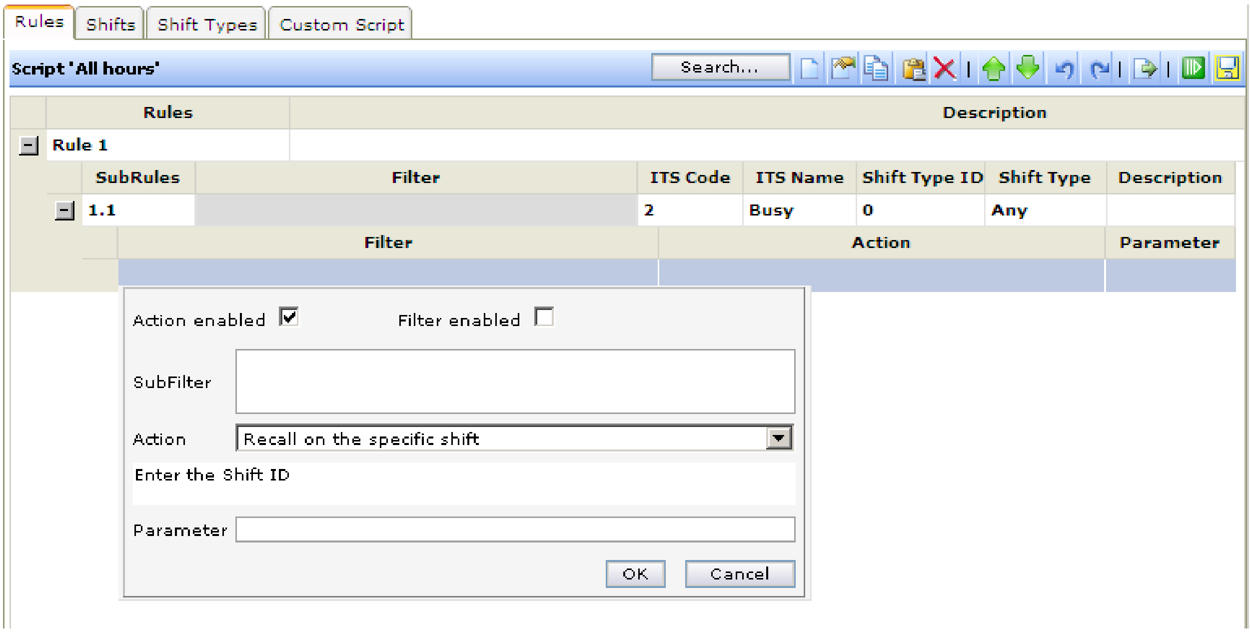



***Figure 96  Adding a new action***

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 sub-filter is applied after the subrule filter). 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 Parameter field below the Action drop-down box allows entering the parameter value in case this is required by the selected action type. 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).

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.

### *4.2.6.4 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 78 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).

### *4.2.6.5 Exporting the scheduling rule definition*

You can export the selected scheduling rule definition as a description in the XML format.

To select a rule you can choose in the list any subrule or action belonging to that rule. Whatever item you choose, the exported definition will include descriptions of all the subrules and actions belonging to the selected scheduling rule.

**To export the scheduling rule definition:**

1. With the scheduling script opened in the View mode (see Viewing the existing Scheduling script settings on page 78 for details), choose the Rules tab in the bottom right frame.
2. Select a rule, subrule, or action and 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 rule definition is then saved to a file in XML format.

### *4.2.6.6 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 78 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.

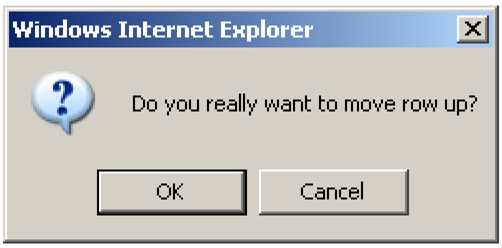



***Figure 97 Confirmation dialog for Move operation***

   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.

### 4.2.6.7 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 78 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.

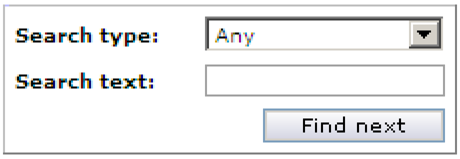



*Figure 98 Searching the scheduling rule list*

3. In the Search type drop-down box select an attribute to search. 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 the frame title bar to close this dialog box.

### 4.2.6.8 Writing the 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 83).

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

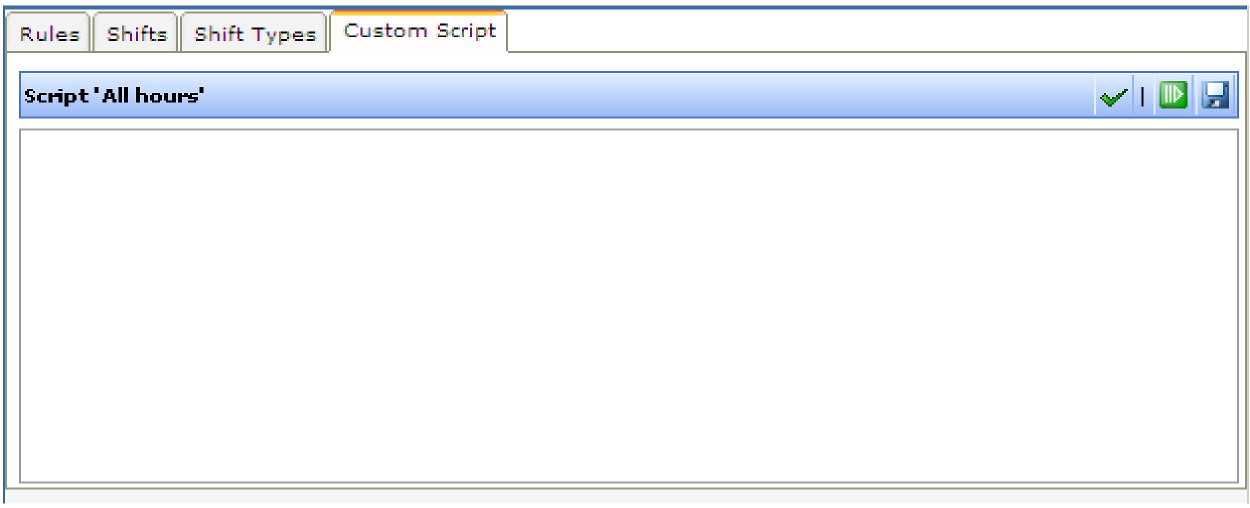



*Figure 99 Adding a custom script*

This tab contains a single text field, which you will use to enter the script code of your own.

2. Enter the script code (JavaScript.NET language is used) in the text field. You can also paste the clipboard contents into this field. Press the Parse button in the bottom right frame toolbar to check the code for correctness.

### *4.2.6.9 Saving a scheduling script*

The Save operation stores all the parameters of the scheduling scripts in Confirmit database.

The CATI Supervisor prompts you to save the scheduling script each time you modify any of its parameters using any tab in the bottom right frame – the Save button in the bottom right frame toolbar starts flashing when you do that. It is a good idea to save the script periodically while you edit it because all unsaved changes are lost in case a power failure or other problem occurs.

The Save operation does not enable the script (does not “launch” it – see Launching a scheduling script below for details). It only stores the script – as a draft, so to say. You may edit this script later on, or delete it, or use as a template for creating other scheduling scripts.

**To save a scheduling script:**

1. Open the scheduling script in the View mode (see Viewing the existing Scheduling script settings on page 78 for details), and choose any tab in the bottom right frame.
2. Press the Save 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.

### *4.2.6.10 Launching a scheduling script*

When you finish configuring and checking the scheduling script you may instantly enable it (or “launch” it in the Confirmit terms).

This operation saves the scheduling script (the way it is described in Saving a scheduling script above), and then launches it. After that the script will be triggered according to the specified rules.

**To save a scheduling script:**

1. Open the scheduling script in the View mode (see Viewing the existing Scheduling script settings on page 78 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.

## 4.2.7 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.

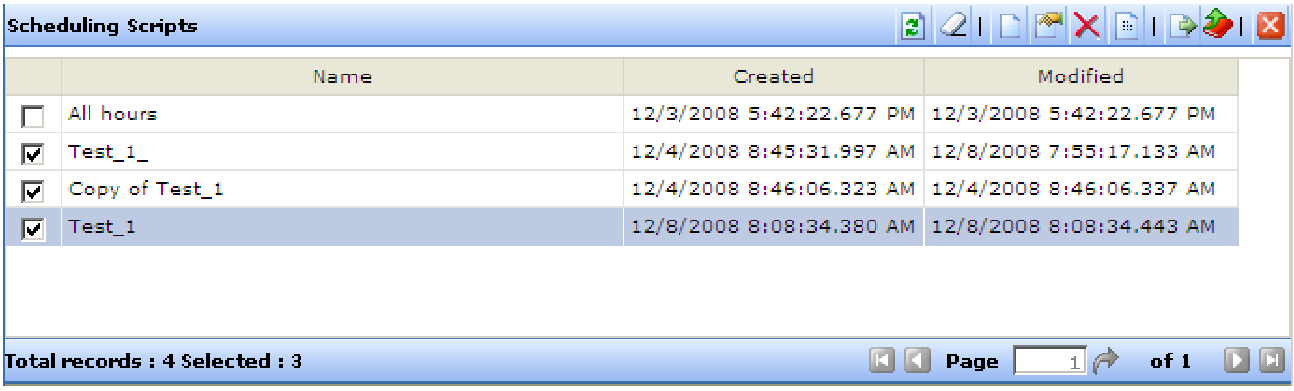



*Figure 100 Multiple Scheduling script selection*

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.

## 4.2.8 Exporting scheduling scripts

You can export descriptions of any existing scheduling script in the XML format.

This provides for the possibility of transferring scheduling script descriptions between different system installations and teams, facilitating the collaboration.

**To export the selected scheduling script(s) description(s):**

1. Select one or a number of existing scheduling scripts in the grid in the top right frame. Multiple object selection is performed by checking boxes in front of the required object names in the grid in the top right frame.

   Alternatively you can click the required scripts keeping the Ctrl or Shift keys on the pressed to select a number of items.

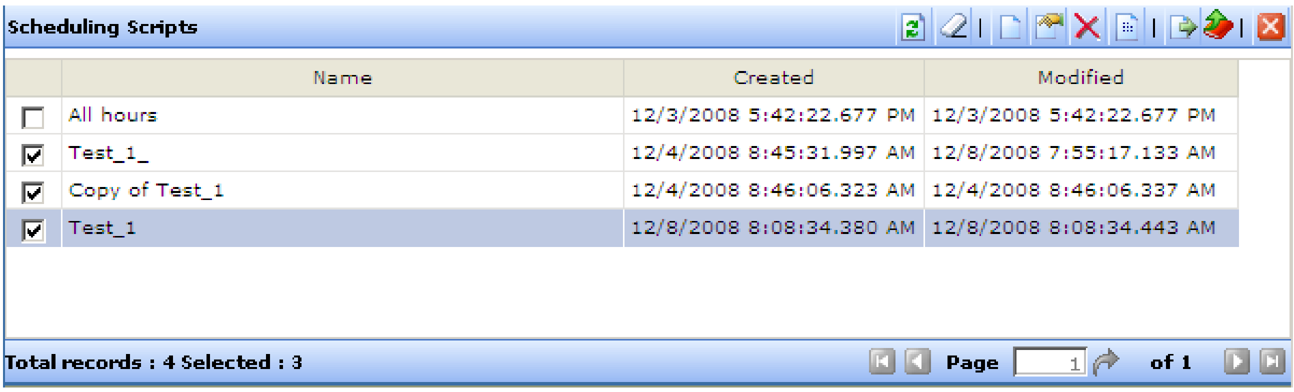



*Figure 101 Multiple scheduling script selection*

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 Export button in the top right frame toolbar. This will display the standard Windows Save As dialog box.

   You can choose any available location for saving the file in XML format.

Press Save to save the file.

## 4.2.9 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 Displaying the list of the Scheduling Scripts on page 75 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.

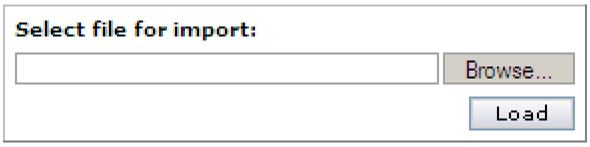



***Figure 102 Selecting an XML description of a scheduling script for import***

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

Press the Load button.

The top right frame refreshes and, if the file is in the format suitable for use with the CATI Supervisor module, the scheduling script is added to the list displayed in the top right frame.

# 5 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 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 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 by-passing, otherwise every time the URL is accessed the user will need to authenticate. Methods such as attempting to load another browser and authenticating there first, then loading the console, will not work. For further information regarding ClickOnce deployment, go to the MSDN website at http://msdn.microsoft.com/en-us/library/ms228998.aspx.**

**To download the CATI Console installation files:**

1. In Confirmit Authoring, go to the **CATI > Download CATI Console** menu command.

   The Download CATI Console dialog opens. Here you can either send the URL to a specified email address or copy it directly into your clipboard.

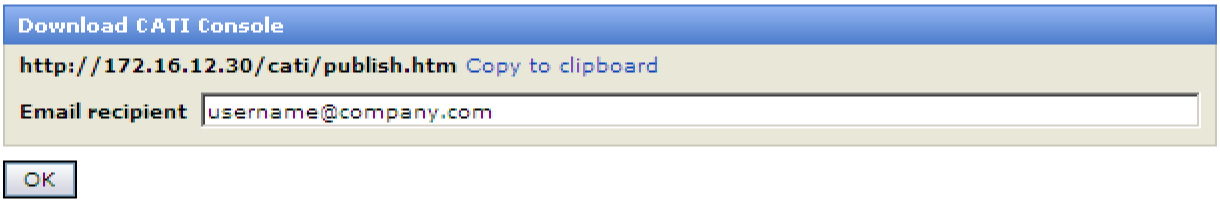



*Figure 103 Fetching CATI Console download URL*

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 104 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 facing page.

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

### 5.1.1 Installing a new copy of CATI Console

**To install a new copy of CATI Console:**

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 91 for details).
2. After file download is complete, read and accept the Confirmit License that appears when the installation procedure starts.

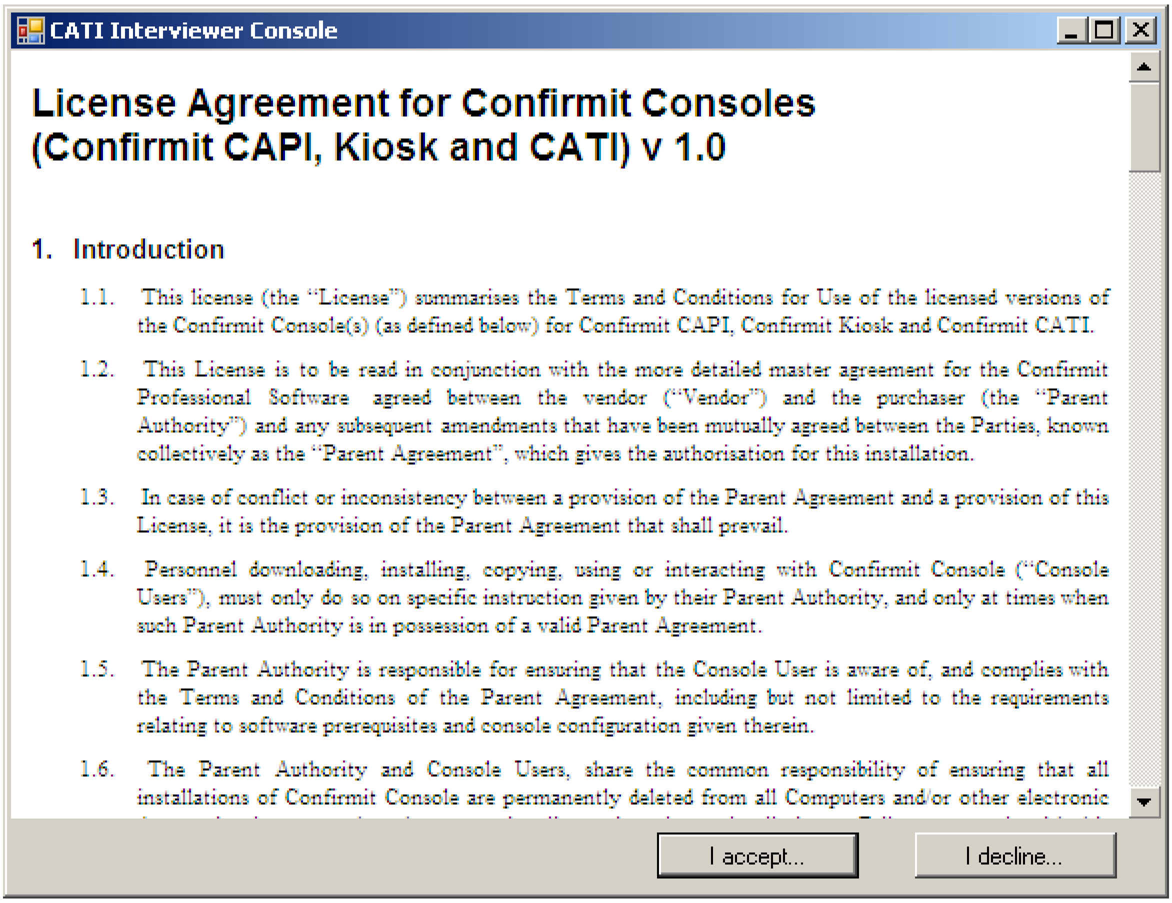



*Figure 105 CATI Console License Agreement*

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.

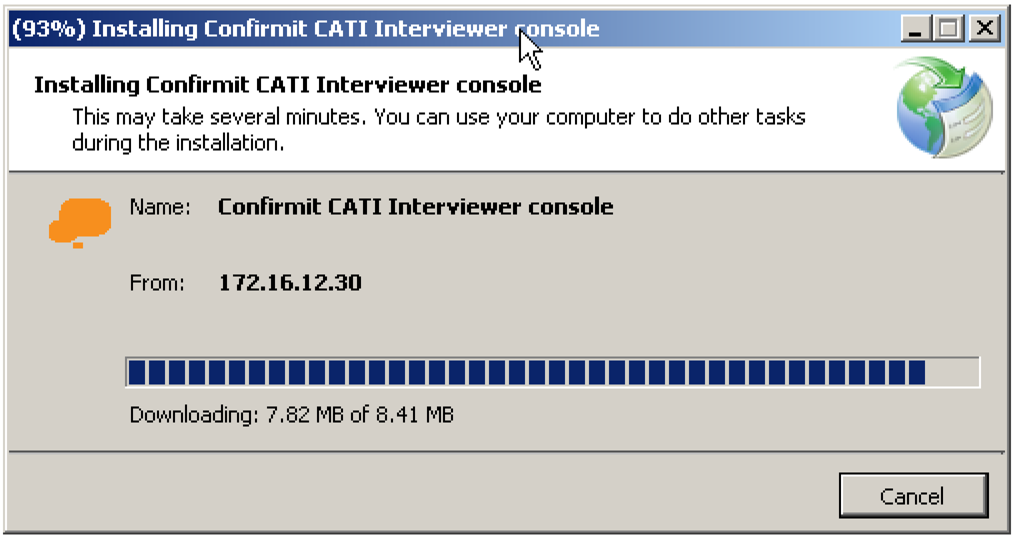



***Figure 106 CATI Console installation progress***

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:\P-rogramData\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 Console and Logging In on page 96 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 107 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.**

## 5.2 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.

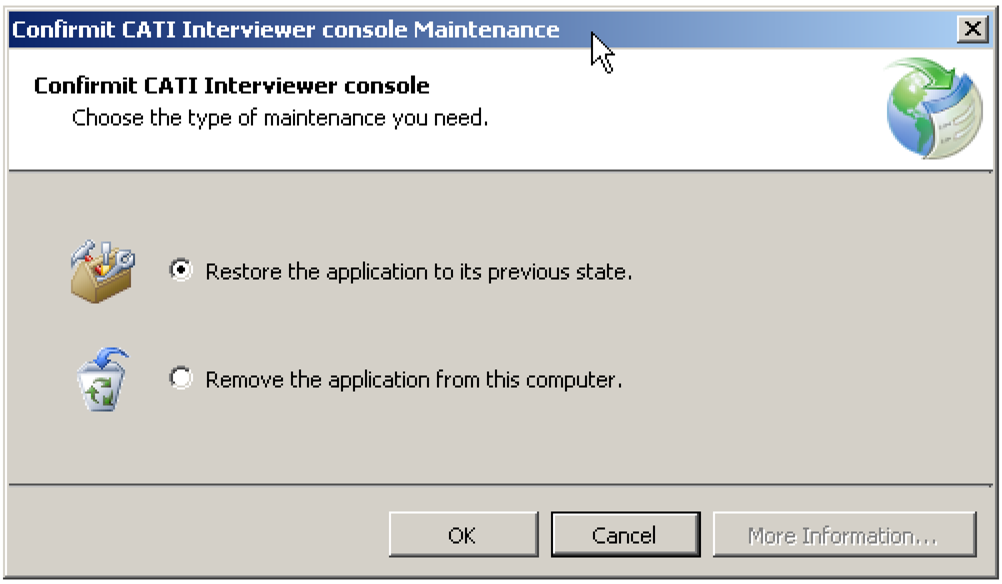



*Figure 108 CATI Console maintenance dialog*

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.

## 5.3 Starting the CATI Console and Logging In

The interviewer has to start the CATI Console application by choosing CATI Console in Confirmit group in the Windows Programs menu.

When the CATI Interviewer Console is started, it displays the Station ID dialog box first.

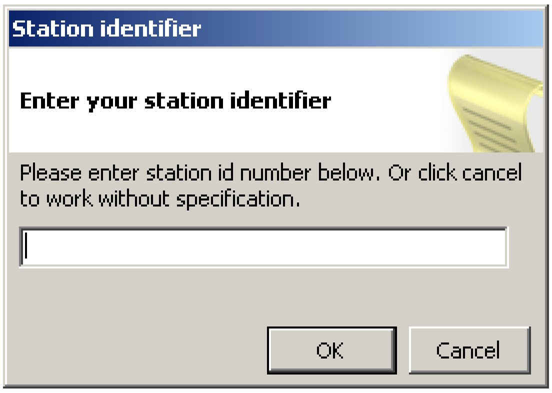



***Figure 109 Entering the Station Identifier***

This dialog box is used for entering the unique ID assigned to this particular software copy (this downloaded copy installed on this particular machine). The Station ID is provided by the software vendor and it cannot be changed. Enter the Station ID and press OK to submit it. The CATI Console will warn you if the entered ID format is incorrect.

In case this is allowed by the Supervisor (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.

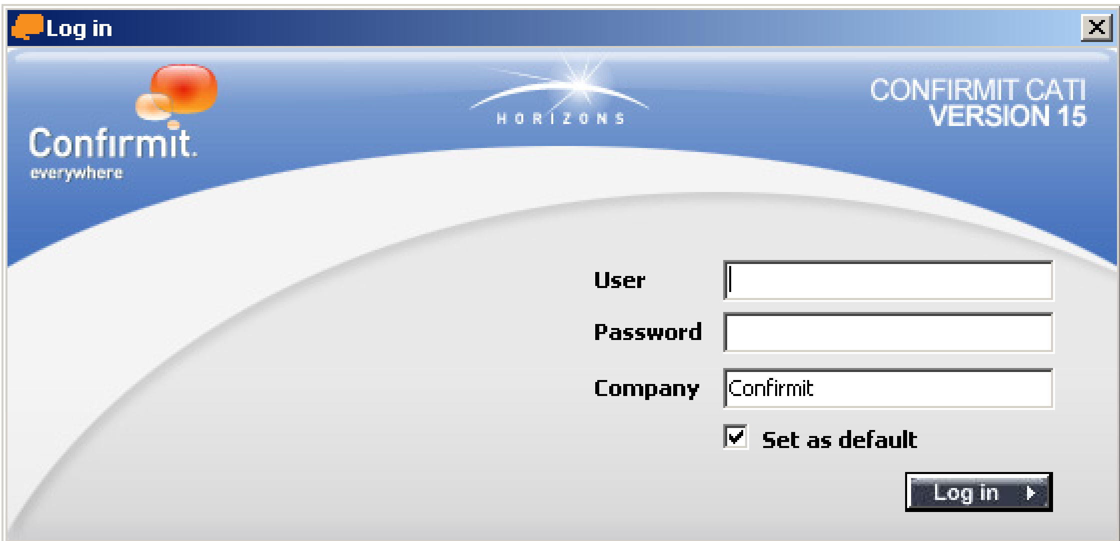



***Figure 110 CATI Console - Login screen***

The interviewer should enter his credentials into the User 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 he/she can decide whether this company name will be used as default each time he/she starts CATI Console - this is done by checking the Set as default box.

To start the login procedure the interviewer should press the Log In button.

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 111 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.

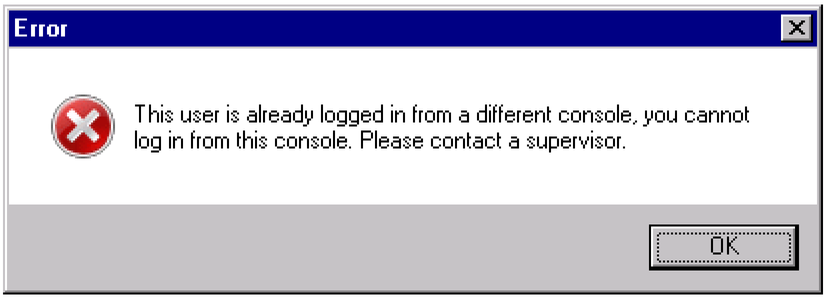



***Figure 112 Warning message displayed when the interviewer performs multiple login***

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 engage the dialing system (the "Dialer" in Confirmit terms - please refer to The Dialer on page 150 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 dialing system is used to deliver the connected calls to the interviewer automatically based on the specified set of rules.

When the CATI Console application identifies the interviewer it displays the dialog box asking to enter the telephone number which will be used by the dialing system 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.

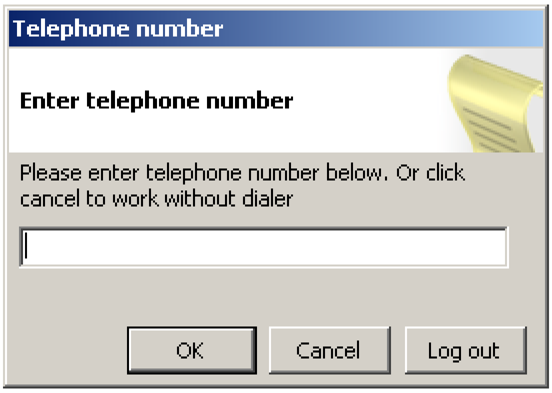



***Figure 113 Entering the telephone number for work with the Dialer***

Pressing OK will start the interviewing session and will also commence communication with the dialing system.

Alternatively the interviewer can press Cancel in this dialog window to perform all the dialing manually, without using the dialing system.

Pressing the Log out button will instantly log the interviewer out.

The difference between two methods for the interviewer is as follows - when the dialing system is being used all the calls designated for this interviewer are connected automatically in the order specified by the survey parameters and determined by the task choice mode (which is 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 dialing system, 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 dialing system was engaged.

Please read Selecting a Survey/Interview on page 102 and Logging Out and closing the CATI Console window on page 116 for information on how the work is organized in every task choice mode, provided the dialing system was or was not engaged.

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 102 and Interviewing procedures on page 108 to understand how the work in CATI Console is organized.

## 5.4 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.

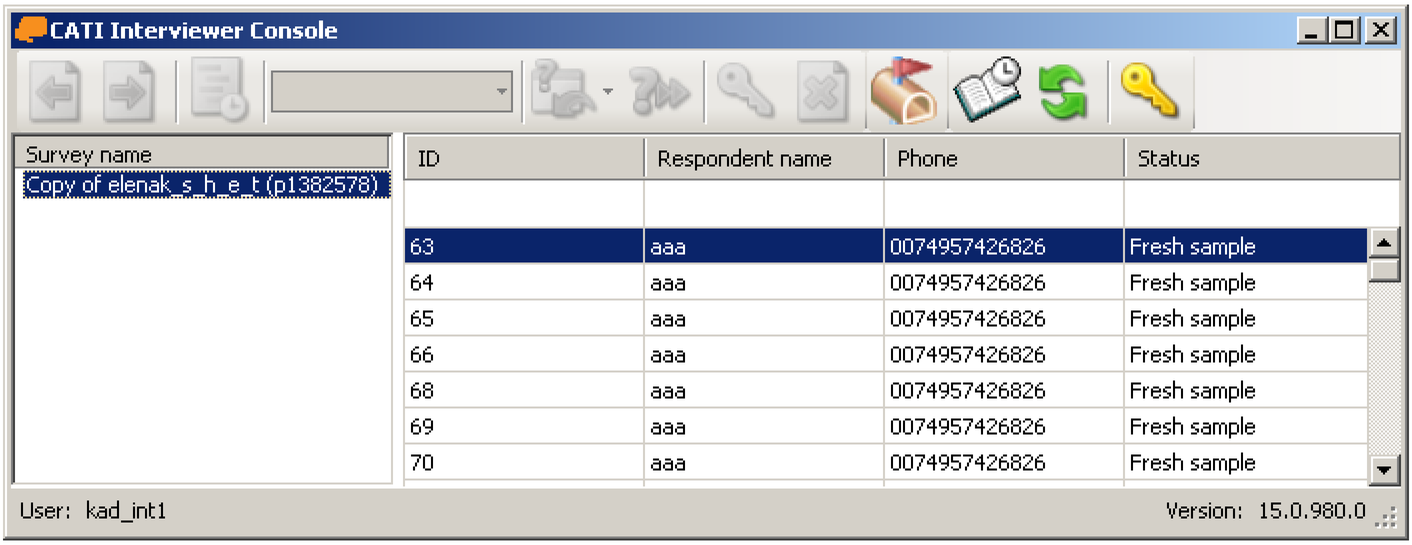
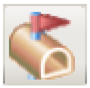
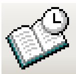



***Figure 114 CATI Console - Survey/Interview selection area***

Four buttons in the right part of the toolbar are available in this case. All these buttons but the Messaging button are disabled when CATI Interviewer Console displays the Interview Question.

| Button | Description | Function |
|---|---|---|
|  | MESSAGING | Displays the Messaging dialog box |
|  | SHOW MY APPOINT-MENTS | 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 See "Viewing messages" on page 101 for instructions 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, 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 Question in the work area. This is the case when the CATI Console is started in the Automatic mode, and when an interview is selected and started in any other task choice mode (actual layout of the answer options may vary).

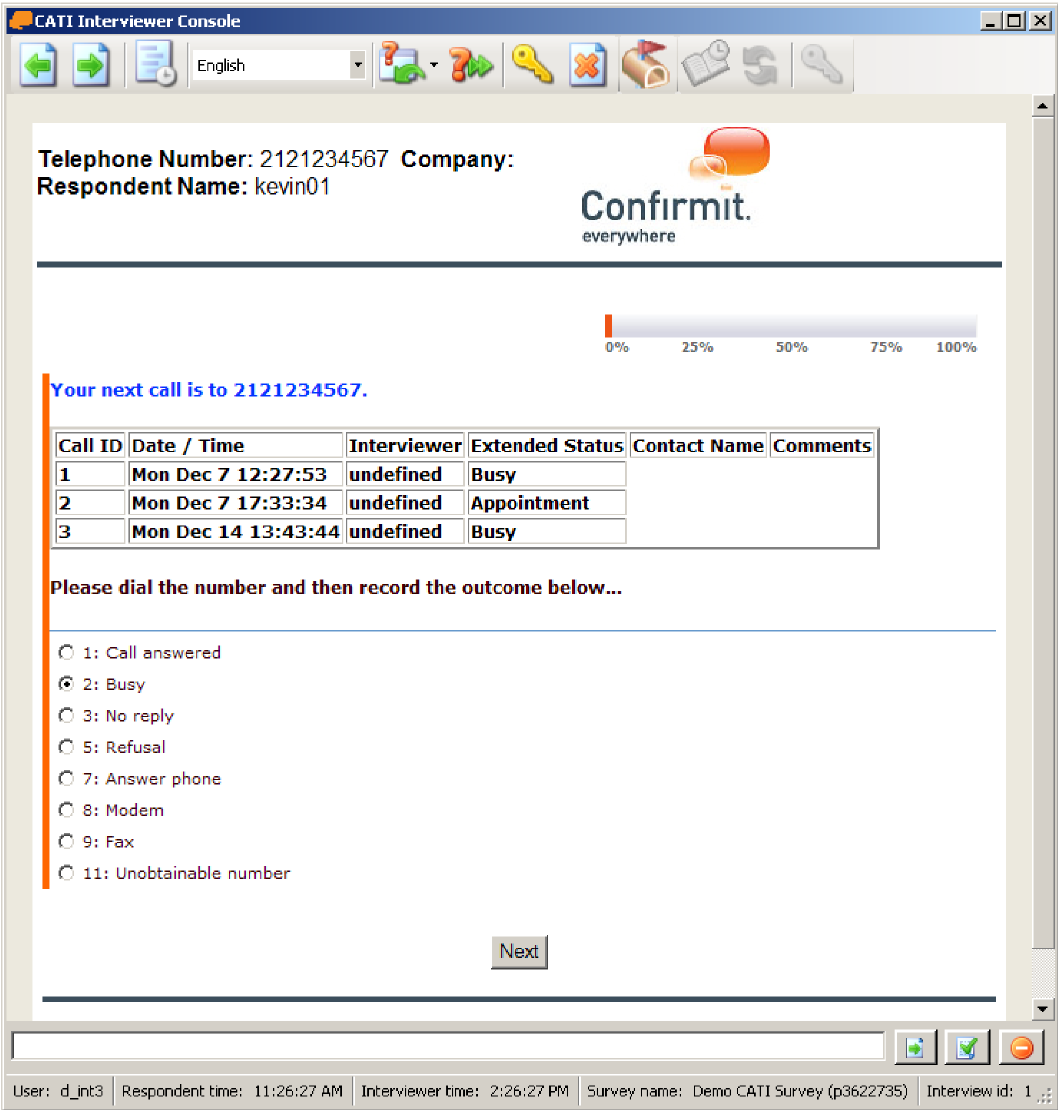
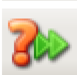



***Figure 115 Interview question displayed in the work area***

The available button set on the toolbar in this case contains the following buttons.

| Button | Hot key combinations | Description | Function |
|---|---|---|---|
|  | Ctrl+Backspace, or Left, or PgUp | PAGE BACK | Displays the previous interview question |
|  | Right, or PgDn | PAGE FORWARD | Displays the next interview question |
|  | 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 a completed interview question and modifying the entered answer variant. |
|  | Ctrl+Enter | FAST FORWARD | Takes you to the last interview question. |

| | | | |
|---|---|---|---|
|  | Ctrl+Q | LOG OUT (AFTER THE CURRENT INTERVIEW) | The toggle button. When enabled 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 the set of hot key combinations that can be used instead of buttons. Also, moving through interview questions and answer selection can be performed with the help of hot keys. Refer to Appendix C on page 179 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 a question (this template is created beforehand and is selected by the supervisor). A couple of arrow buttons below the answer variants allow moving through questions.

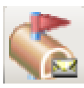
Besides the question text and answer variants the work area may display prompts, warnings and other messages which guide the interviewer.

A text field and a button set are displayed at the bottom of the work area. This text field is used to enter the answer text manually – the entered text is used to help selecting the appropriate answer variant in case the interviewer cannot locate it visually. Also, buttons in the set allow selecting the default answer variant, and the "refused" answer variant.

## 5.5 Viewing messages

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

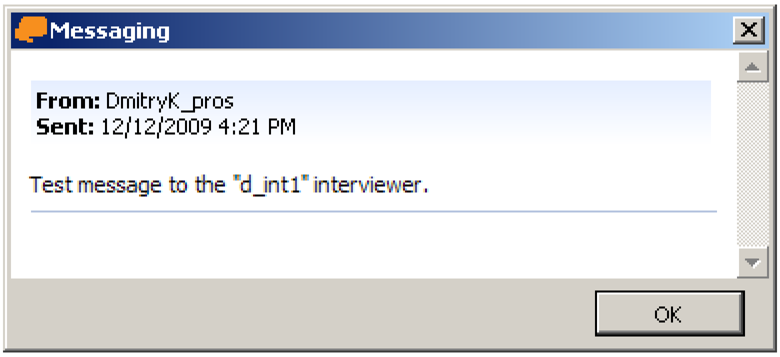
- upon successful logging into CATI Interviewer Console;
- while working with the Console.

In case the interviewer logs in and there is a message that was sent to him while he was offline, the CATI Interviewer Console starts with the Messaging button 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.

## 5.6 Selecting a Survey/Interview

On successful login depending on the interviewer's choice CATI Console may or may not engage the dialing system in processing calls (see Starting the CATI Console and Logging In on page 96 for instructions on engaging the Dialer).

In case the interviewer chooses not to engage 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 engaged all required interview calls are delivered to the interviewer already connected - he/she does not have to dial manually. Basically nothing changes in the way the interviews are delivered when the Dialer is engaged - they are delivered according to the task choice mode specified by the supervisor. Procedures corresponding to the task choice modes are described below.

After the interviewer logs in and engages or rejects the Dialer, the CATI Interviewer Console starts operating in the task choice mode that was specified for the current interviewer by the supervisor. The task choice mode defines the way in which interviews are delivered to an interviewer. The following task choice modes are available:

- Autromatic – 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 on the facing page for details).
- Survey selection – this mode provides for manual interview selection within the survey which the CATI system chooses for the current interviewer (see Survey Selection mode on page 104for 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 105 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 107 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 engaged, and it operates in the Preview mode (see The Dialer on page 150 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 it by pressing a button - usually this is the regular arrowed Next button.

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 116 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.

## 5.6.1 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, the interview is started and the first interview question is displayed on the screen immediately.

In case there are no interviews assigned, CATI 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.

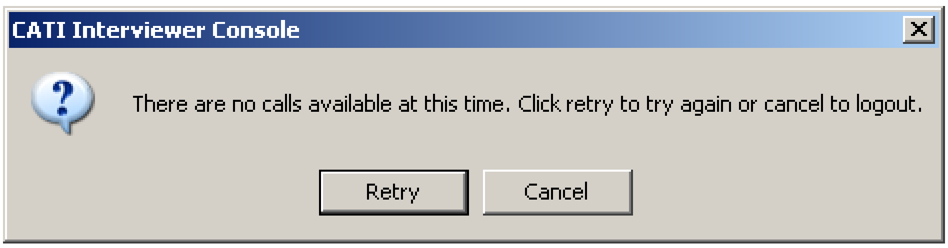



***Figure 117 Message displayed upon logging in when no interviews are available***

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.

### 5.6.2 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 left pane in the work area. He selects a survey by doubleclicking its name in the list in the left pane, and CATI Interviewer Console starts the first interview from that survey assigned to that interviewer.

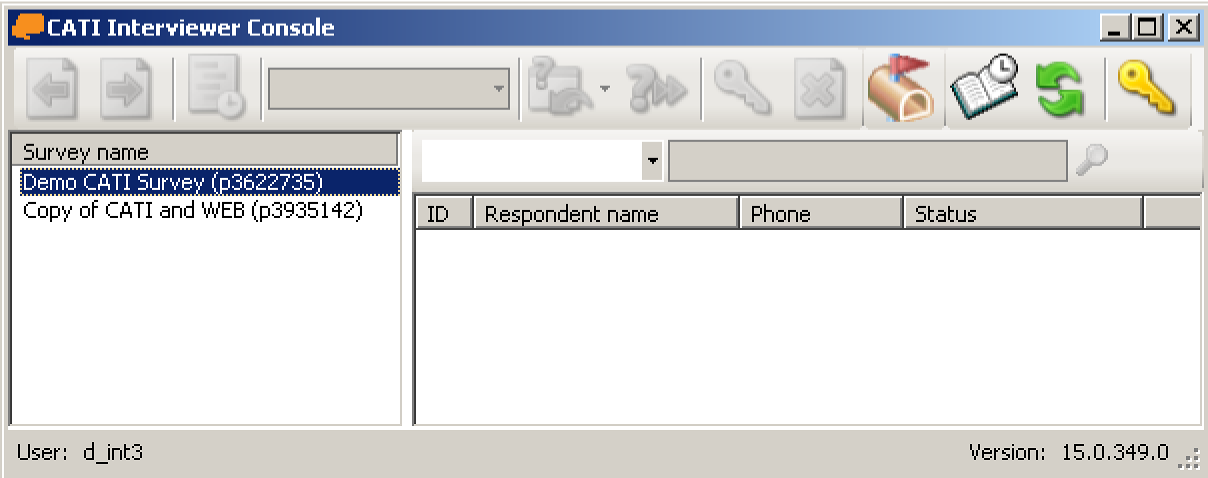



***Figure 118 CATI Console - Survey/Interview selection area***

Since that moment CATI Interviewer Console operates in the Automatic mode – see Automatic mode on previous page for details. When the first interview is finished, CATI Interviewer starts the next one and so on, until all interviews from this survey assigned to the interviewer are finished.

**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 the left frame in that case).**

In case there is no survey assigned for the current interviewer, CATI Console displays the following message.

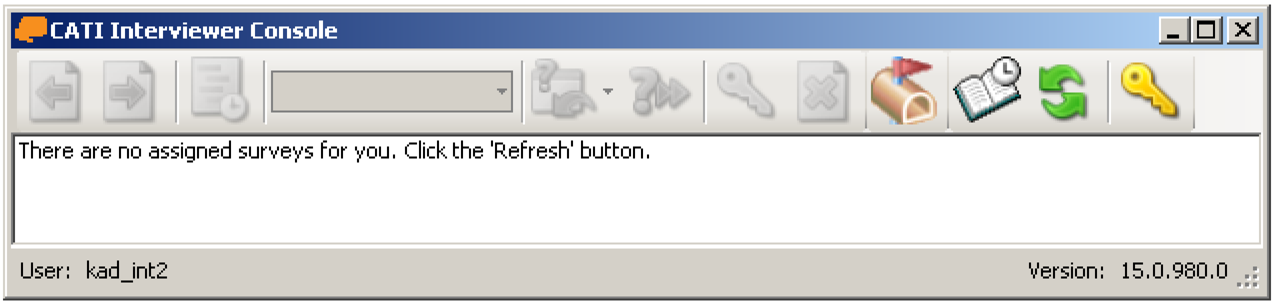



***Figure 119 Warning message displayed upon logging in when no surveys are available in Survey Selection mode***

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 116 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.

### 5.6.3 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.

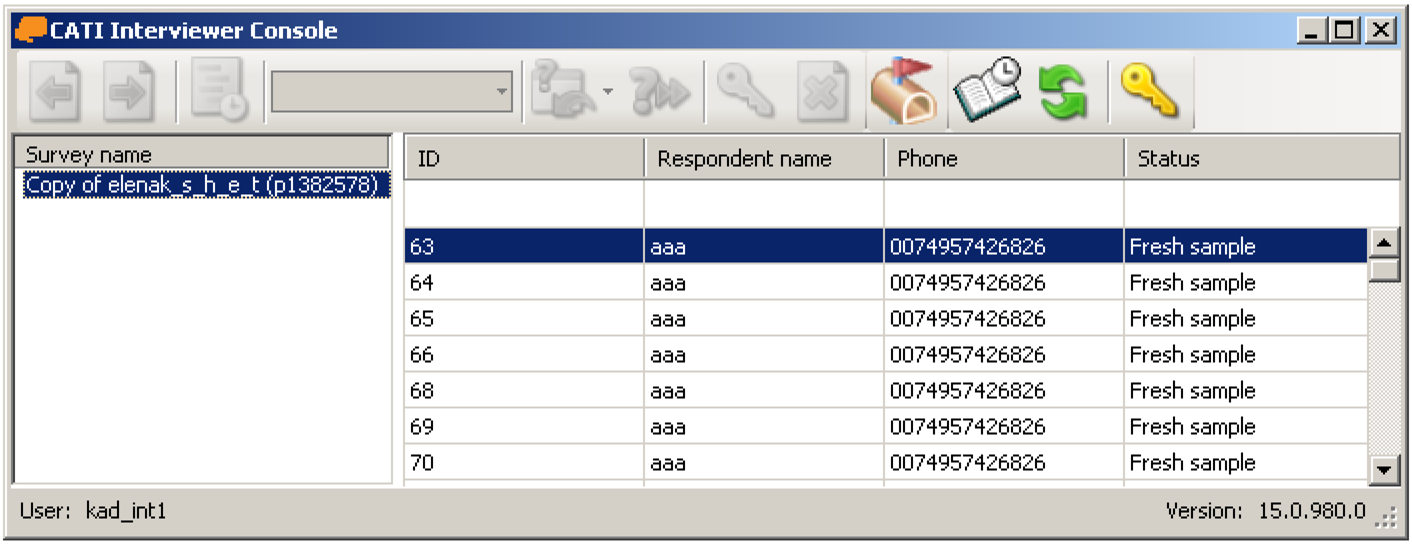



***Figure 120 CATI Console - Survey/Interview selection area in the Manual Selection mode***

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 44).

To start interviewing you have to select an interview by double-clicking its name in the list in the right pane.

In case there is no interview assigned for the current interviewer, CATI Console displays the following message.

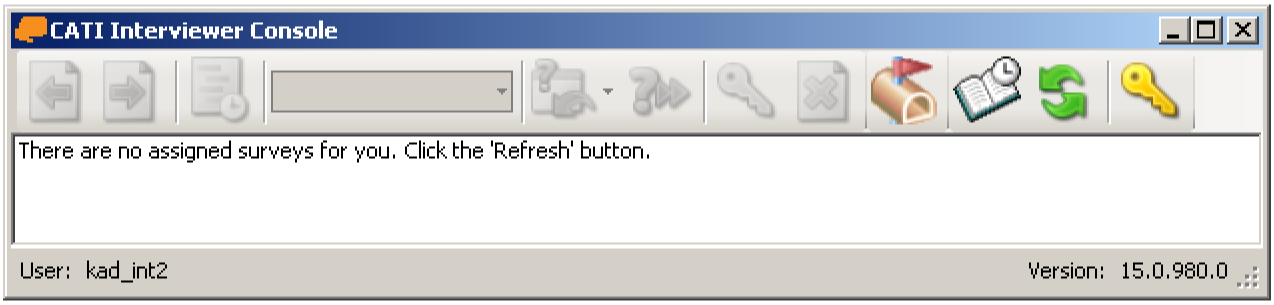



***Figure 121 Warning message displayed upon logging in when no surveys are available in Manual Selection mode***

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 116 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 details below).

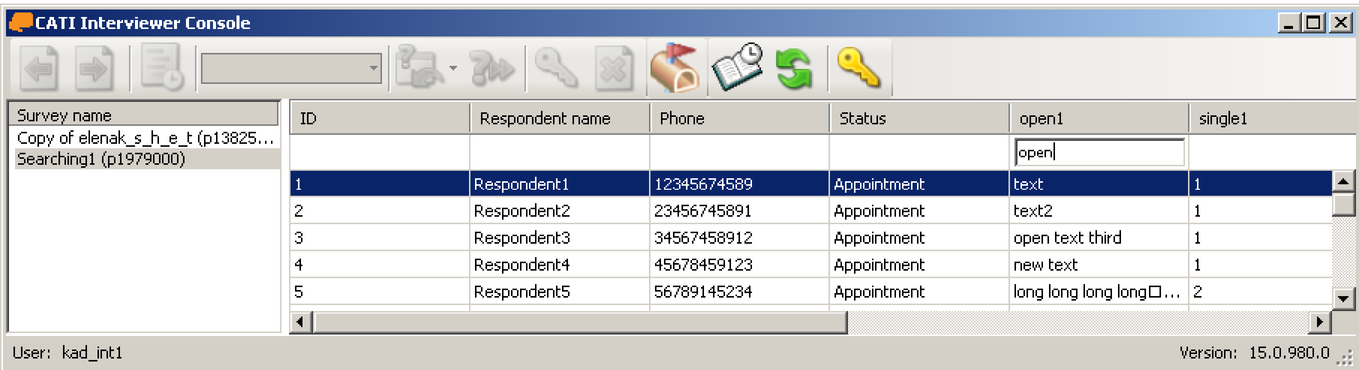



***Figure 122 CATI Console - searching for the interview by its parameters***

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 does not support wildcards.

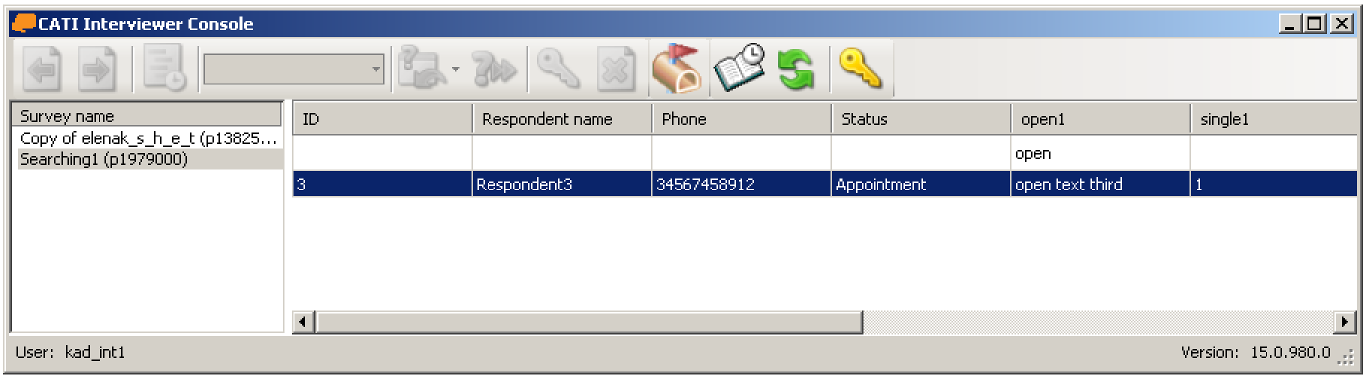



*Figure 123 CATI Console displaying the search results*

The search string will be displayed in the search cell until the interviewer opts to remove the search results and display the complete interview list again. To display the complete interview list again the supervisor has to remove the search string by deleting it and to press Enter on the keyboard. After that the interview list will show all the interviews that are available for the currently logged in interviewer.

## 5.6.4 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 a 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 he logs 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.

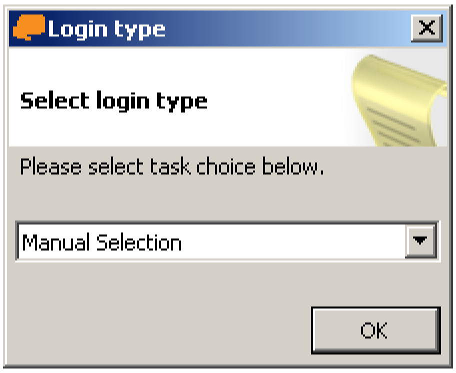



*Figure 124 Selecting the task choice mode in the Choice mode*

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 103, Manual Selection mode on page 105, and Survey Selection mode on page 104 for information on other task choice modes.

## 5.7 Viewing the list of appointments

The interviewer should keep an eye on appointments he/she made before. 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 the interview changes the extended status (from “Appointment” to any other).

**To view the list of appointments:**

1. When you are selecting an interview in either Survey Selection or Automatic mode press the Show My Appointments button  on the toolbar.

   This will display the Interviewer Appointments window.

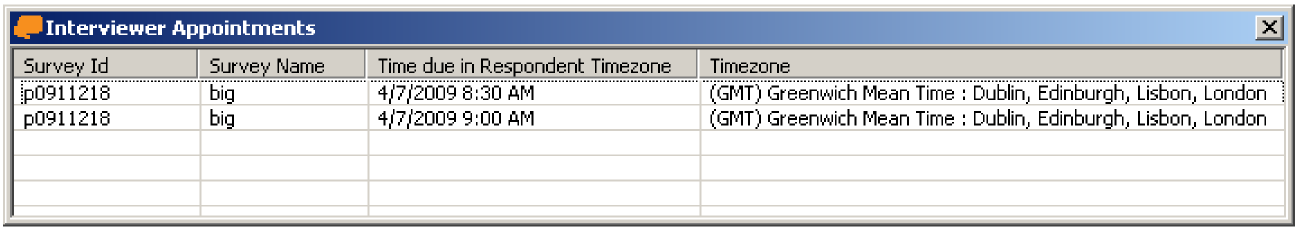



***Figure 125 The Interviewer Appointments window***

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;
   - Survey Name – 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.

## 5.8 Interviewing procedures

When an interview is started the first interview page is displayed in the work area. It may contain any kind of information - everything that the interview template implies. It may contain question along with all the answer variants, prompt for the interviewer etc.

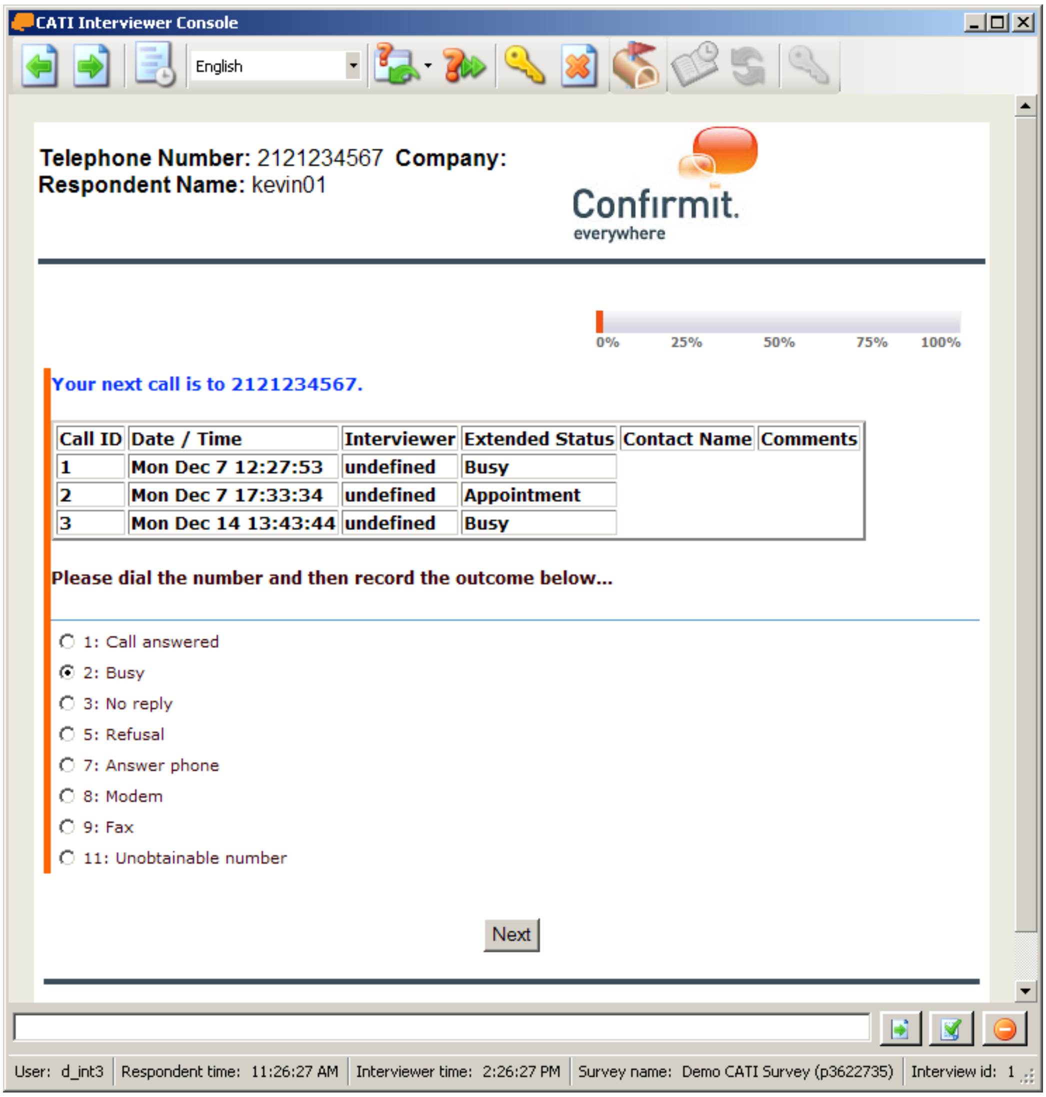



***Figure 126 The first interview question displayed in the work area***

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) and then enters the answer.

Next he/she moves to another question, selects an answer variant, 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 is able to:

- Select a language in which interview is to be conducted;
- Jump one or more questions back or forward (view one of the previous or pending questions with answer variants);
- Make an appointment according to the respondent’s will;
- Modify answers entered for previous questions;
- Skip to the last answered question;
- Terminate an interview;

- Log out (after the interview is either terminated or finished).

### 5.8.1 Going through an Interview

The interview must be selected and started before the interviewing process can begin. The interview is selected differently in different task choice modes – please refer to Selecting a Survey/Interview on page 102 for details.

After the particular interview is chosen, the work area displays the question accompanied by answer variants. The interviewer asks the respondent this question and lists all answer variants if needed. When the respondent chooses the answer variant, the interviewer marks the chosen answer (or a number of answers) in the answer list in the appropriate way. For example, in the picture shown below the interviewer has to select a radio button to mark an appropriate answer.

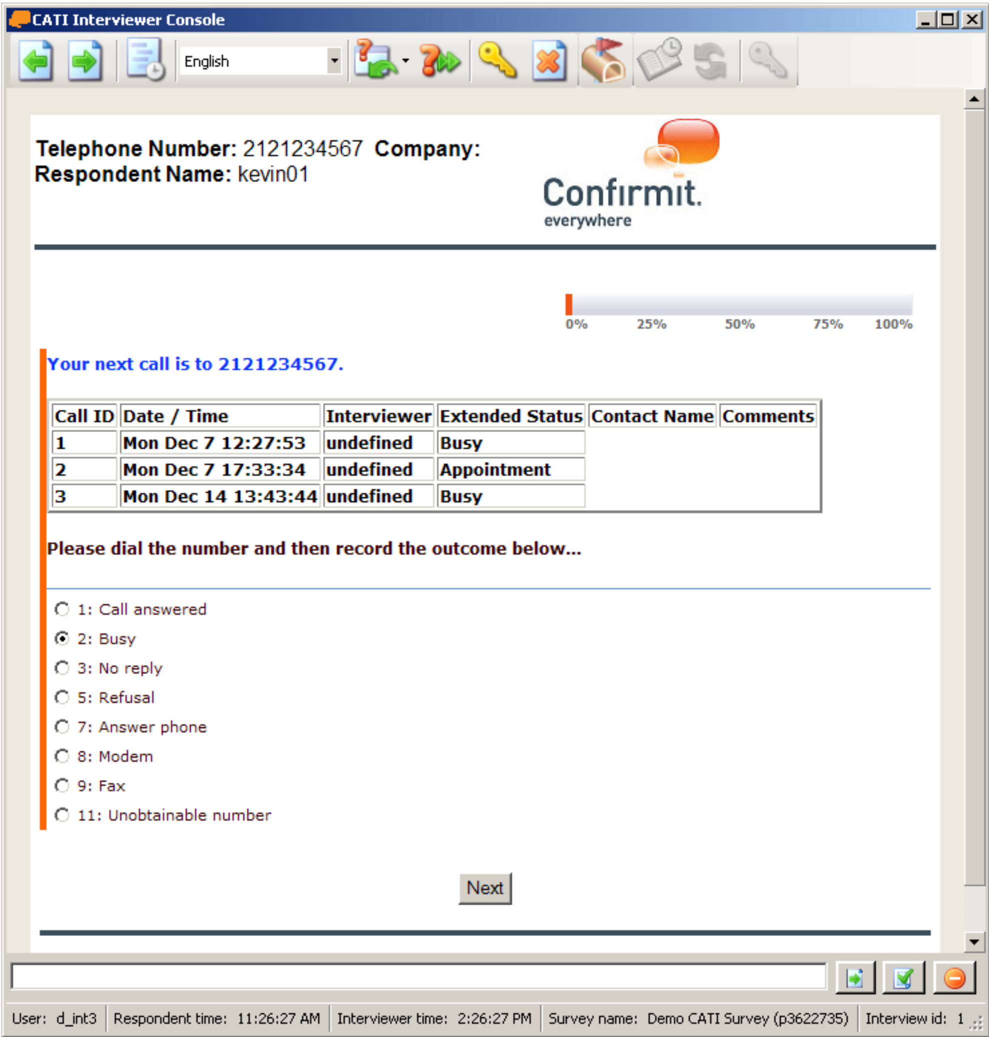
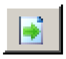
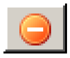



***Figure 127 Selecting an answer to the question***

In case the interviewer is unable to locate the required answer variant visually he/she can use the text field in the bottom of the question area and type that variant in the field. 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 are marked in the answer list 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.

If this is not the first question in the interview, the Back and Next buttons appear in the work area.

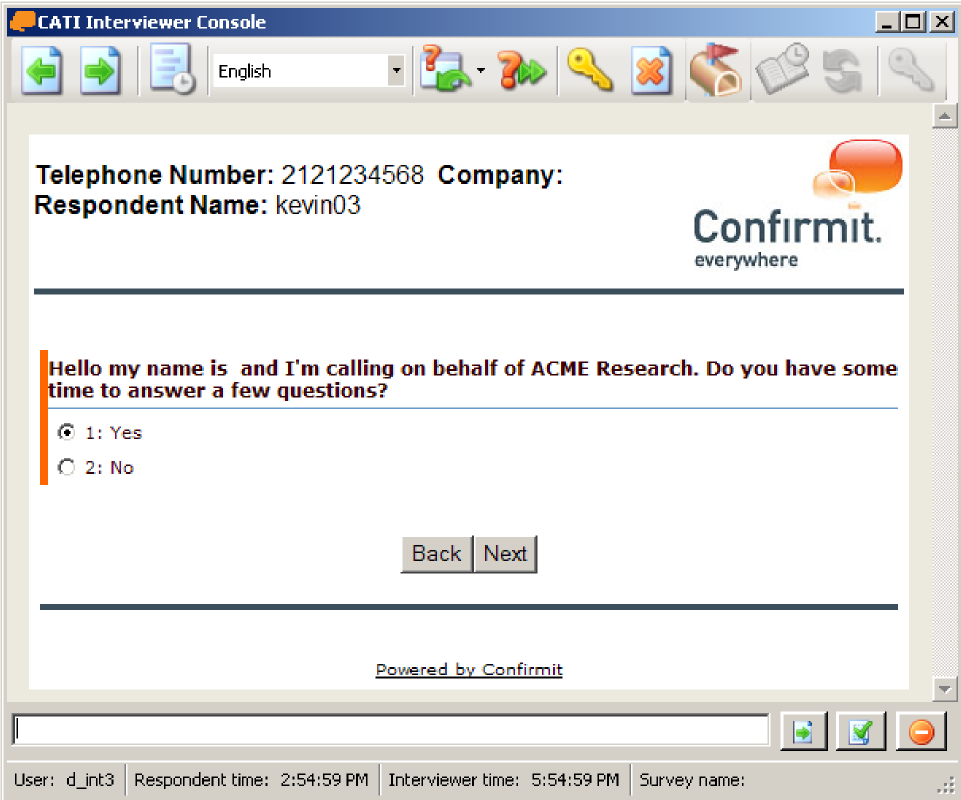



***Figure 128 Navigating through interview questions***

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.

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) and correcting the answer .

The interviewer can move one question back and one question forward. This is done 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. Note that these buttons and hot key combinations duplicate arrow buttons located on the question page below the list of the answer variants. You cannot move forward if the current question has no selected answers.

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 to the required question is to press the Redo button on the toolbar (see Modifying an already entered answer variant on page 114 for instructions).

When the interviewer moves a number of questions back, he/she gets an option of quickly returning to the last answered question without the need of going through questions one by one. To return to the last answered question 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, the interviewer can resubmit the previous interview page to the system. To do so he should press the F5 key on the keyboard.**

Also the interviewer may decide to log out of the CATI Console after the current interview is over. To do that you 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 116 for details).

The Interviewer can also terminate the current interview immediately without leaving the CATI Console. To do that you should press the Terminate current interview button on the toolbar , or press Ctrl+X on the keyboard (see Terminating an interview on page 115 for details).

The interview is considered finished when all interview questions are answered – see The finished interview below for details.

## 5.8.2 The finished interview

After all interview questions are answered that interview is considered 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 wit the system and there are no interviews assigned for him (see Automatic mode on page 103, Survey Selection mode on page 104, and Manual Selection mode on page 105 for details).

Please see Logging Out and closing the CATI Console window on page 116 for information on logout options.

## 5.8.3 Making an appointment

In case the respondent expresses his will to continue inetrview 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. Of course the postponed interview can be started only in case the interviewer is already logged into CATI Console.

An appointment can be made only for the started interview.

**NOTE 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 agreed he/she should press the Appointment button , or press Ctrl+A on the keyboard.

   This will display the Appointment dialog window.

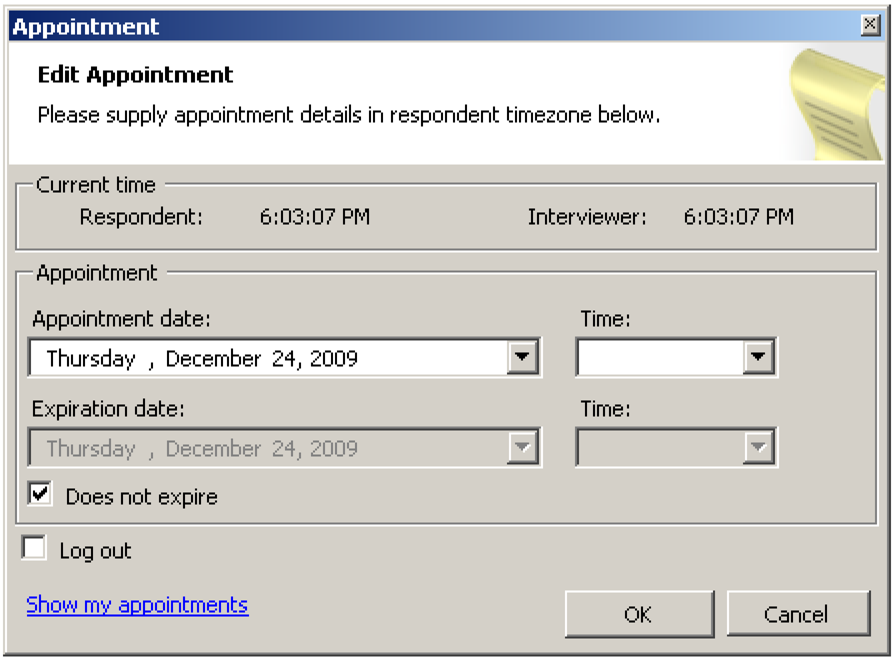



***Figure 129 The Appointment dialog window***

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 130 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. 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.

6. You can view the list of appointments you have already made. 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 See "Viewing the list of appointments" on page 108 for information).

7. 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 112 for details).

## 5.8.4 Modifying an already entered answer variant

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).

**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 from the current interview.

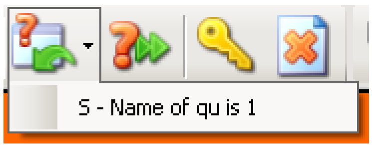



***Figure 131  The Redo button drop-out menu***

   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 arrow button, or
   - press the Fast Forward button on the toolbar, which will take you to the first question for which no answer was given (see Skipping to the first question without answer on the facing page for details).

## 5.8.5 Selecting an interview language

The interviewer can select a language in which intrview 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.

### 5.8.6 Skipping to the first question without answer

CATI Console provides the interviewer with convenient feature of instantly getting to the first question which has no answer variants selected. This feature can be very useful in case you navigate away from the last question that was displayed in the work area. 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 your last question. Instead of waisting 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 without answer:**

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 which has no selected answer is displayed. This should be the question you have left to go back to another question.

### 5.8.7 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 you can also shut down the CATI Interviewer Console, which will terminate the interview, but 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, if an interview is in progress at the moment, CATI Console first displays the dialog box asking if you want to terminate the current interview. Press Yes to terminate the interview, and close CATI Console, press No to close this dialog box and continue working in CATI Console. If you choose to terminate the interview and 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.

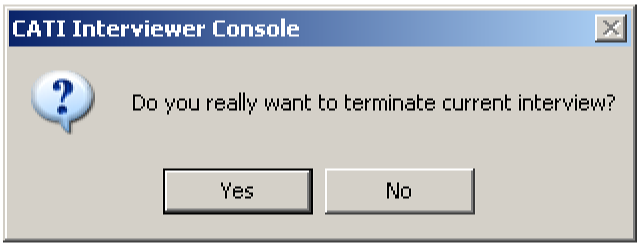



***Figure 132 Warning message displayed upon intentional interview termination***

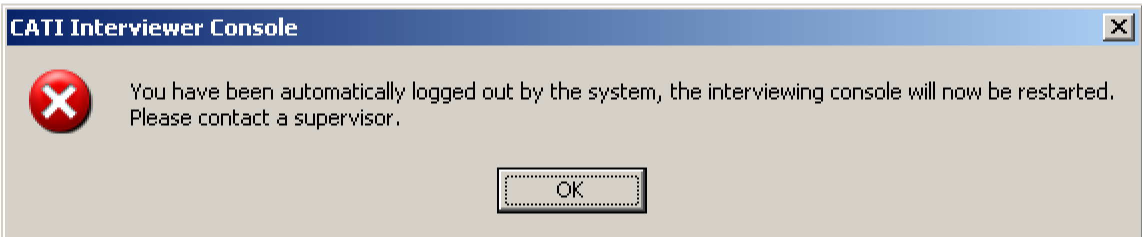
3. Press NO to close this dialog box and continue working with the interview. Press YES to terminate the current interview.
4. When the current interview is terminated, CATI Console starts the next assigned interview.

   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 112 for details)

### 5.8.8 Interview terminated by the supervisor

The supervisor can for some reason terminate an interview in progress.

In such case the following warning message is displayed.




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.

## 5.9 Logging Out and closing the CATI Console window

There are several ways the interviewer can use to log out of CATI Console.

Generally, the interviewer can log out of CATI Console after finishing any assigned interview. Although different task choice modes assume different CATI Console behaviour 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 112 chapter 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. CATI Console will instantly log you out of the current session.

**To log out when working in the Manual, or Survey task choice mode:**

1. When the current interview is finished in the Manual task choice mode CATI Console displays the Survey/Interview selection pane (this is also the case when you work in the Survey Selection task choice mode and all assigned interviews from the selected survey are finished). 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 103, Survey Selection mode on page 104, and Manual Selection mode on page 105 chapters for description of available log-out 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 112 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.

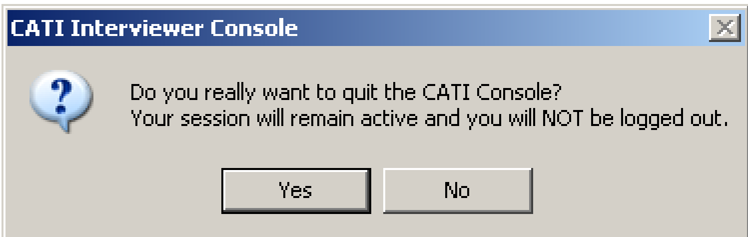



***Figure 133 Warning message displayed when the interviewer shuts the CATI Console window***

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 See "Selecting a Survey/Interview" on page 102 for details.

# 6 Monitoring in the CATI Supervisor

The CATI Supervisor module provides the possibility of monitoring all kind of activities involving CATI objects.

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.

## 6.1 Choosing an object to monitor

Supervisor can select an 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 observe and 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.

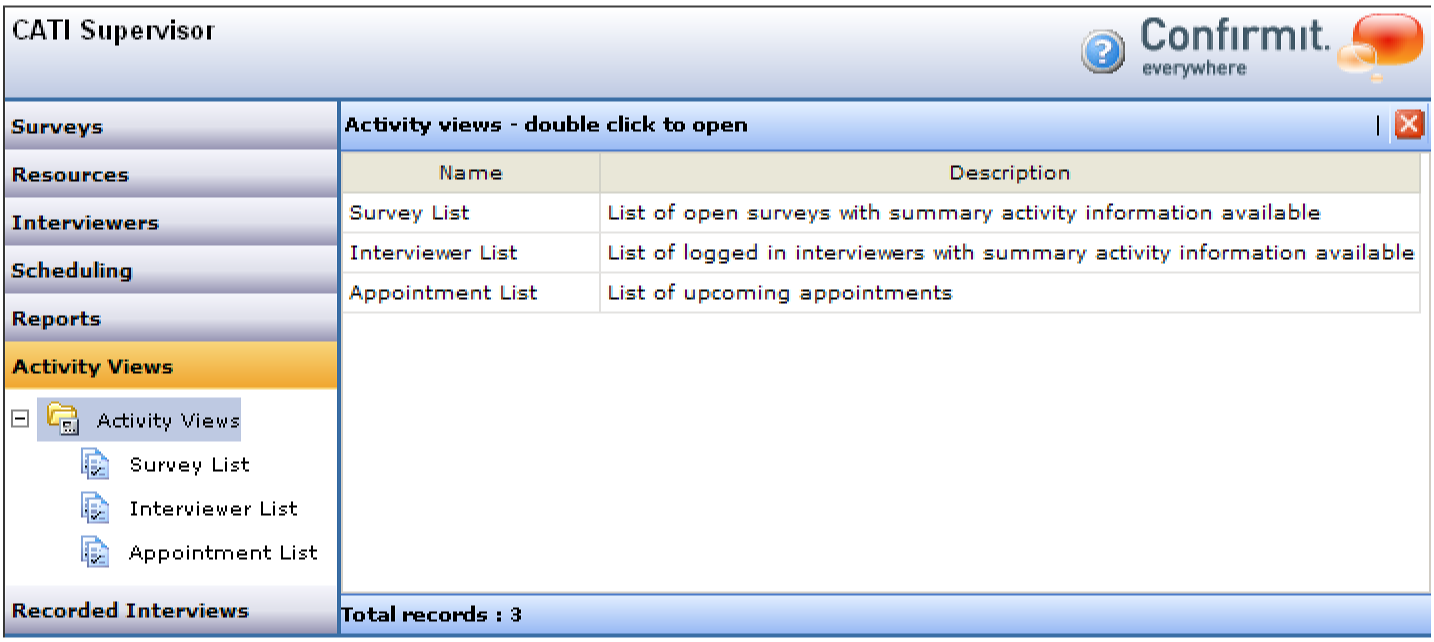



*Figure 134 Activity Views object type list*

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, See "Monitoring interviewers and their work" on page 123, and See "Monitoring appointments" on page 137 for descriptions of the procedures you can perform working with these windows.

## 6.2 Monitoring surveys and survey related events

To monitor surveys and survey related events supervisor has to choose the Survey List object (see Choosing an object to monitor on previous page). It is then opened in the Survey List dialog window.

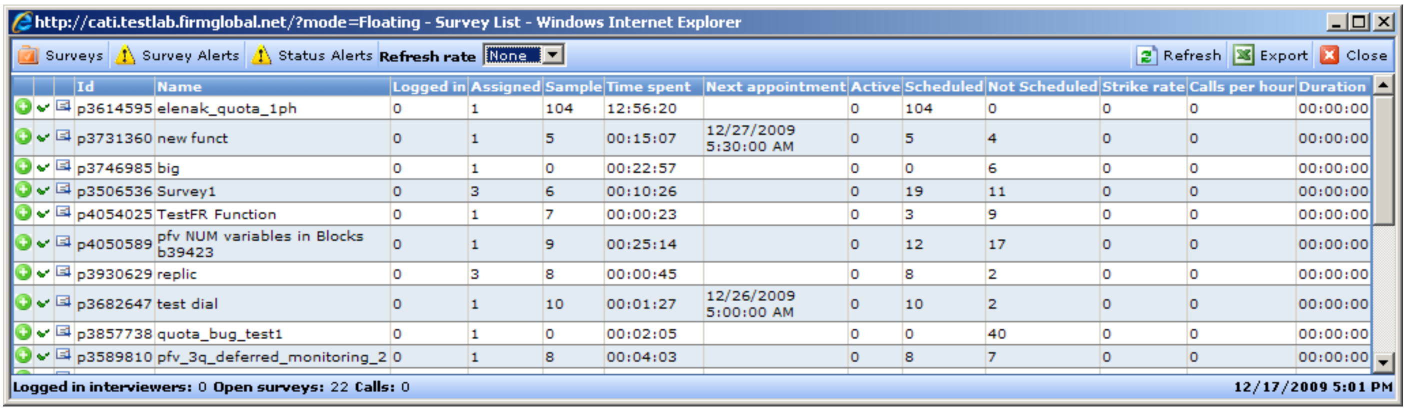



***Figure 135 Activity Views - Survey List dialog window***

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

- Survey ID
- Survey Name
- The amount of currently logged in interviewers
- The amount of interviewers this survey is assigned to
- The sample size
- Total amount of time spent since the first interview was started
- Next appointment time
- The amount of active calls
- The amount of scheduled calls
- The amount of not scheduled interviews
- Strike rate
- 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 122 for details). The alert indicator displays alerts pertaining to different survey parameters (see Setting up survey alerts on page 121 and Setting up extended status alerts on page 121for details). The Send Message button allows creating and sending messages to interviewers (see Sending messages to interviewers on page 133 for details).

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. |
| 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. |

## 6.2.1 Selecting surveys to display in the grid in the Survey List window

Supervisor can choose what surveys should be displayed in the survey list. This can be done with the help of the Survey Search form using which supwervisor can search for surveys by their names, or can apply filter to the survey list.

**To select surveys for displaying in the survey list:**

1. Press the Surveys button Surveys on the toolbar.

   This will display the Survey Search form below the button.

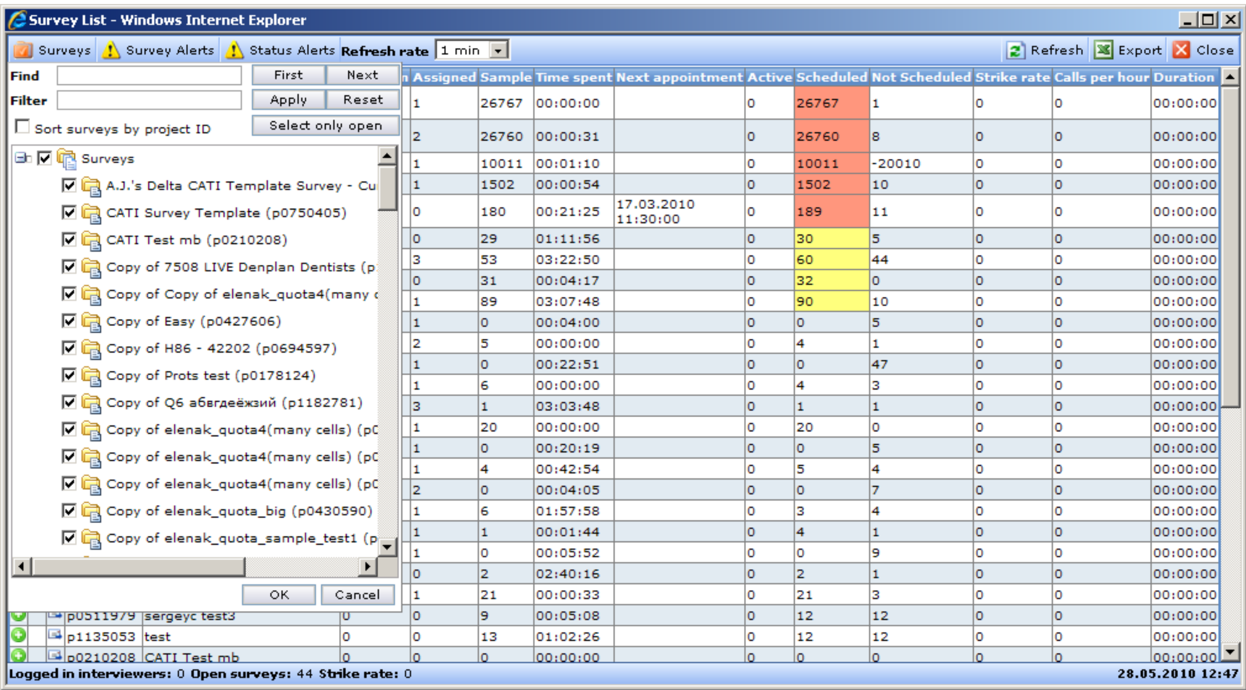



*Figure 136 The Survey search form - selecting surveys to display in the Survey List*

The form contains the Find and Filter fields, the Sort surveys by project ID checkbox, and the complete survey list 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.

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. Or you can select only "open" surveys (surveys with their state set to "Open"). To do this press the Select only open button.
5. 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.

### 6.2.2 Setting up survey alerts

Monitoring is about observing the state of a number of survey parameters. CATI Console automates monitoring process by providing configurable visual alert facility.

Second to left column contains the alert indicator which shows whether some survey parameter has reached or even exceeded the threshold you have specified for that parameter.

Parameter thresholds are specified in the dedicated form.

Normally, when the parameter value does not near, or exceed the specified threshold, the alert indicator in the grid for the corresponding survey stays green - .

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 triangle color changes to red. The affected parameter cell is highlighted in the corresponding color – amber, or red.

In addition, to attract your attention, CATI Console 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 with normal green indicators (all parameters are normal).

**To specify alert parameters:**

1. Press the Survey Alerts button Survey Alerts on the toolbar.

   This will display the Survey Alert form below the button.

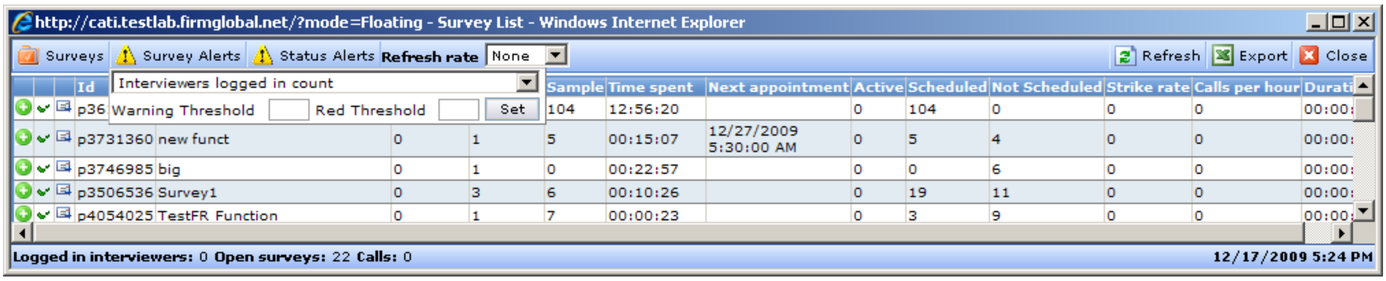



*Figure 137 Setting up survey alerts*

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.
5. Repeat the procedure to specify thresholds for other parameters.

### 6.2.3 Setting up extended status alerts

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

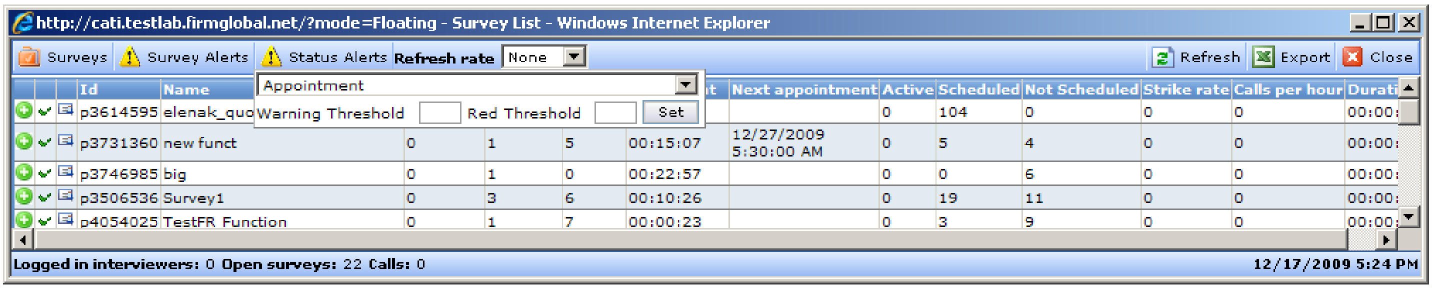



*Figure 138  Setting up extended status alerts*

The only difference is that CATI Console highlights cells in the extra grid containing survey calls information, and you have to expand this extra row to observe the situation (see Monitoring survey calls and their status below for details).

## 6.2.4 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.

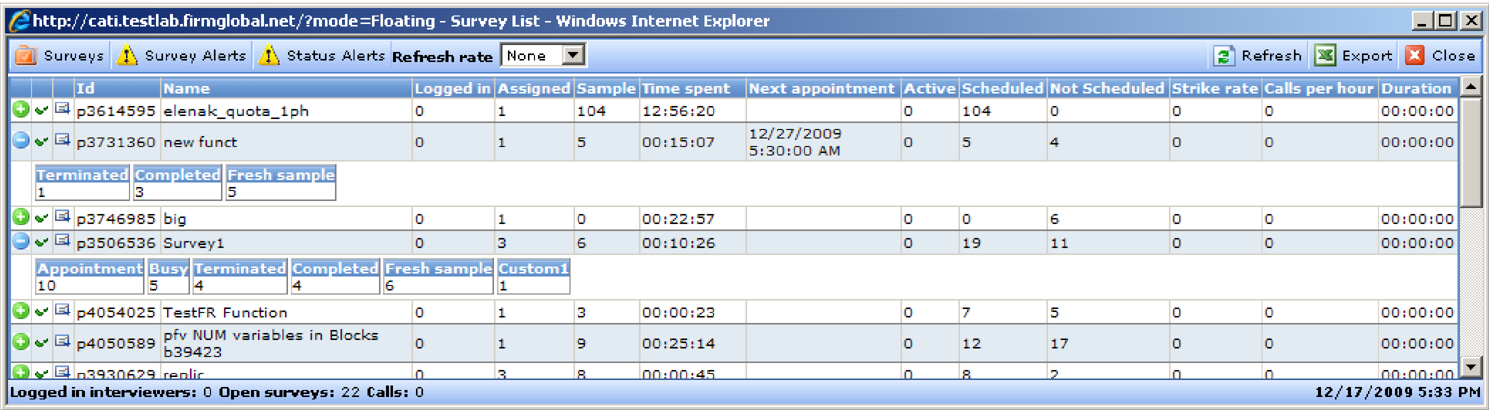



*Figure 139  Displaying an extra extended status row in the survey grid*

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 toSetting up extended status alerts on previous page for instructions on setting up the alerts.

## 6.2.5 Setting up the survey list refresh rate

Supervisor can instruct CATI Console to automatically uipdate the survey list and get the latest parameters.

To do this you can select the required increment value from the Refresh rate drop-down list.

Alternatively you can always refresh the survey list manually by pressing the Refresh button Refresh on the toolbar.

## 6.3 Monitoring interviewers and their work

To monitor interviewers and their work supervisor has to choose the Interviewer List object (see Choosing an object to monitor on page 118). It is then opened in the Interviewer List dialog window.

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 126 for details.

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

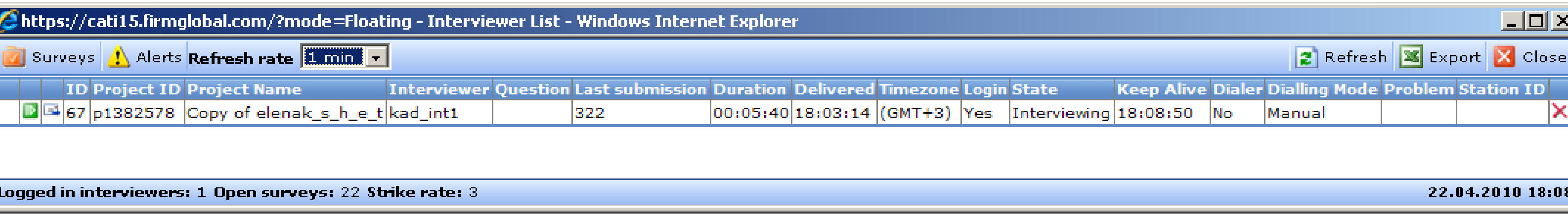



*Figure 140 Activity Views - Interviewer List dialog window*

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

- ID
- Project ID
- Project Name
- Interviewer
- Question
- Last submission
- Duration
- Delivered
- Timezone
- Login
- State
- Keep Alive
- Dialer
- Dialling mode
- Problem
- Station ID

Three leftmost grid columns are occupied by the alert indicator (blank in case no alerts are triggered), Monitoring Console Start/Stop button , and the Send Message button .

The last (rightmost) column is occupied by the Terminate button .

The alert indicator displays alerts pertaining to different interviewing parameters (see Setting up interviewer alerts on page 125 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 130 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 130 for details).

The Send Message button allows creating and sending messages to interviewers (see Sending messages to interviewers on page 133 for details).

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

| Button | Description | Function |
|---|---|---|
|  | SELECT SURVEYS | Displays the survey selection form. Allows selecting surveys for which the list of interviewers is displayed in the grid. |
|  | 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 |
|  | REFRESH | Allows updating the survey list manually. |
|  | EXPORT | Allows exporting currently displayed list of interviewer activities. |
|  | CLOSE WINDOW | Closes the Survey List dialog window. |

### 6.3.1 Selecting interviewers 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 supervisor can search for surveys by their names, or can apply 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.

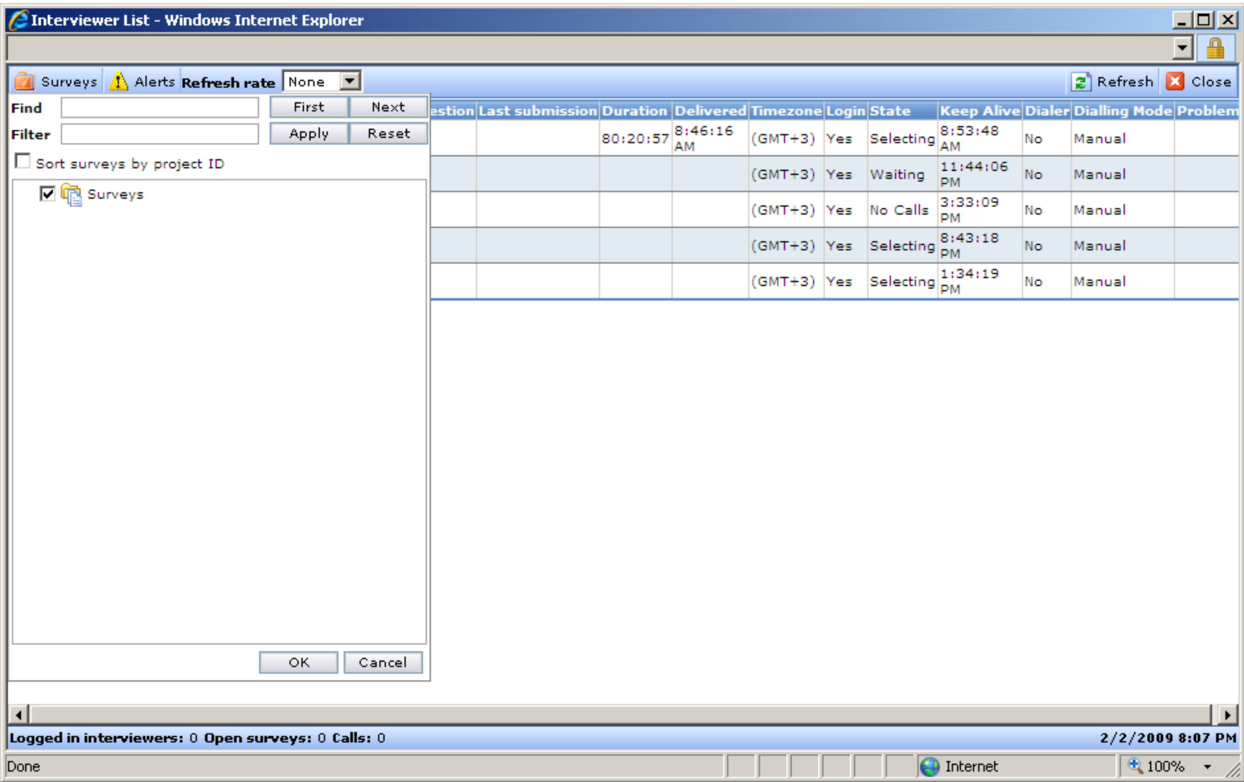



***Figure 141 The Survey search form - selecting surveys for the Interviewer List***

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 hierarachical tree, where each survey is accompanied by a checkbox that allows selecting that survey.

By default all checkboxes are cleared and no survey is 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. 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.

## 6.3.2 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 (red 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 (warning value exceeded for any of the monitored parameters) come first, then come interviewers with the amber indicator (red 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 

on the toolbar.

   This will display the Alert form below the button. Pictures below show the Alert form with already configured values and illustrate possible alert situations.

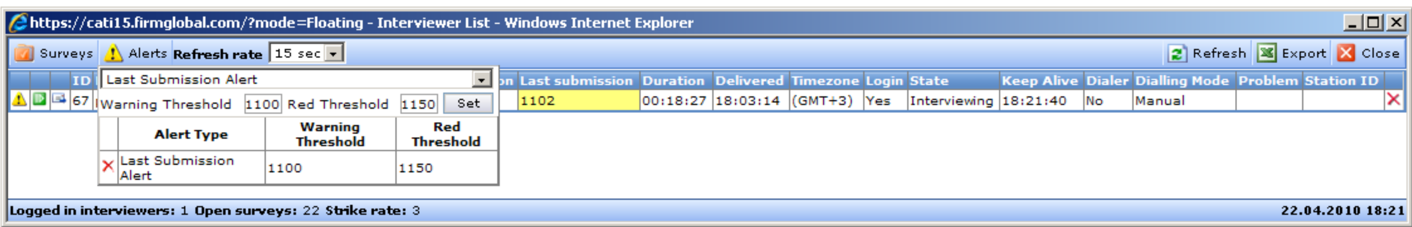



*Figure 142 Setting up interviewer alerts. Amber alert is displayed.*

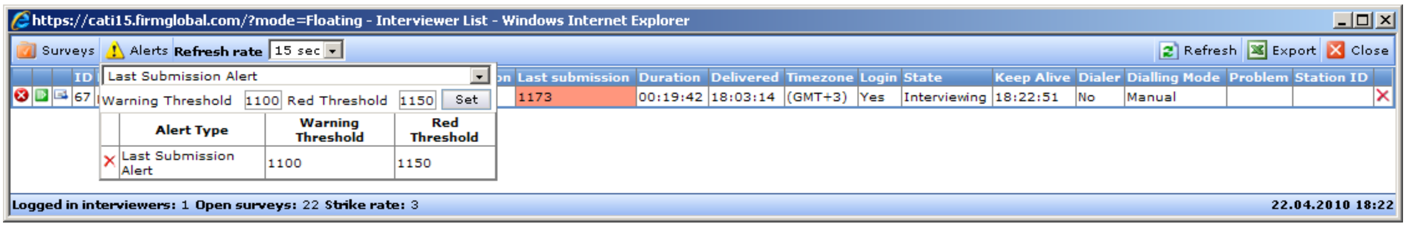



***Figure 143 Setting up interviewer alerts. Red alert is displayed.***

2. Choose the interviewer parameter to monitor from the drop-down list. This list includes parameters displayed in the grid columns.
3. Enter the warning and the critical (Red) threshold values in the fields below.
4. The bottom form row displays the current Warning and Red threshold value. An icon to the left - - deletes these values and removes the alert.
5. Press Set to activate the specified threshold.
6. Repeat the procedure to specify thresholds for other parameters.

## 6.3.3 Downloading the CATI Monitoring Console Installation Files

**Note: Please check the following setting in the MSIE options - it is required for the CATI Monitoring Console to work properly. Run the MSIE browser and select Tools on the MSIE menu bar. Choose Internet Options from the Tools menu. This will display the Internet Options dialog box. Choose the Security tab. In this tab choose the Trusted Sites zone and press the Custom Level button in the bottom of this tab. This will display the Security Settings dialog box. Scroll down the list in this dialog box until you reach the Downloads group. Choose the Enable radio button for the "Automatic prompting for file downloads" option. Press OK in each dialog box to confirm changes and close these dialog boxes.**

Note that the download and installation procedures described herein are performed on the same machine – you should always install CATI Monitoring Console on the same machine you have used to download the installation files.

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

**IMPORTANTThis note is intended for users who work behind proxy. ClickOnce is the mechanism that is used for the CATI console installation. ClickOnce provides support for Windows Integrated proxy authentication. ClickOnce does not provide support for other authentication protocols such as Basic or Digest. Users who run the installation behind a proxy server where that proxy server uses Basic authentication will be presented with an error message stating that the URL cannot be reached as proxy authentication is required. Console installation and console running will therefore not work through a Basic authentication proxy server. For Basic authentication, the only solution is that the user allows for proxy by-passing, otherwise every time the URL is accessed the user will need to authenticate. Methods such as attempting to load another browser and authenticating there first, then loading the console, will not work. For further information regarding ClickOnce deployment, go to the MSDN website at http://msdn.microsoft.com/en-us/library/ms228998.aspx.**

**To download the CATI Monitoring Console Installation Files:**

1. In Confirmit Authoring, go to the **CATI > Download CATI Monitoring Console** menu command.

   The Download CATI Monitoring Console dialog opens. Here you can either send the URL to a specified email address or copy it directly into your clipboard.

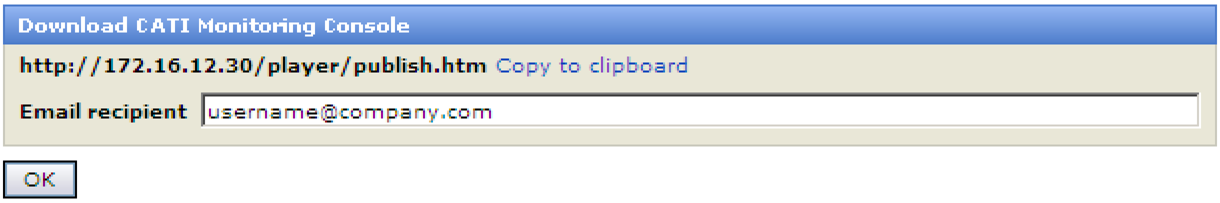



*Figure 144 Fetching CATI Monitoring Console download URL*

The default email address, to which the download URL will be sent, is that specified for the currently-logged-on user - 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 145 CATI Monitoring Console download page*

4. Click the link and follow the instructions to download the file.

   In case prerequisites mentioned in the dialog window shown above are not installed on your machine, they will be downloaded and installed automatically prior to the Console installation. CATI Console installation procedure will commence right after all the prerequisites are successfully installed.

5. For instructions regarding CATI Monitoring Console installation please refer to Installing a new copy of CATI Monitoring Console below.

   CATI Monitoring Console upgrade procedure is described in Upgrading CATI Monitoring Console below.

### 6.3.3.1 *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 126 for details).
2. The dialog window with the progress bar showing the installation progress is displayed.

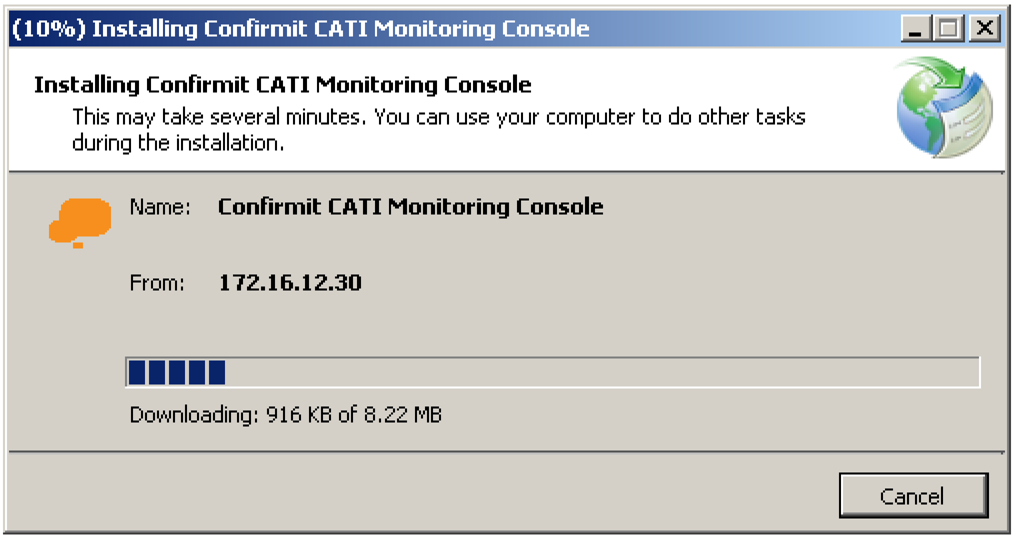



***Figure 146 CATI Monitoring Console download progress***

   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.

### 6.3.3.2 *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.

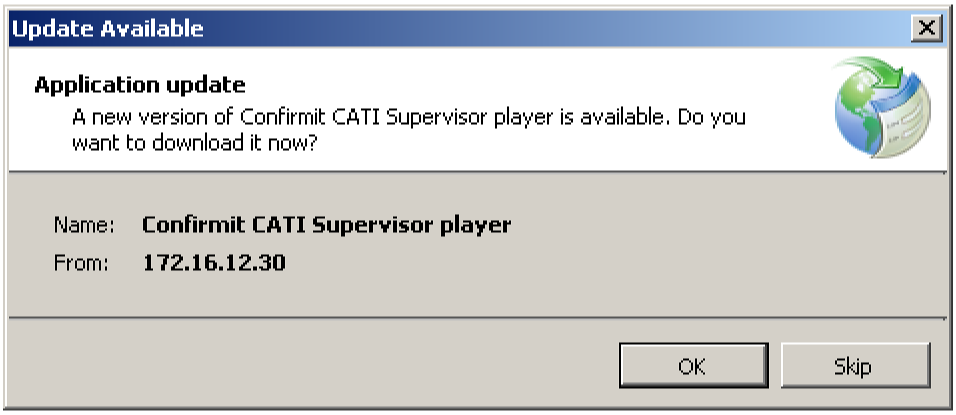



*Figure 147 CATI Monitoring Console update announcement*

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.

### *6.3.3.3 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.

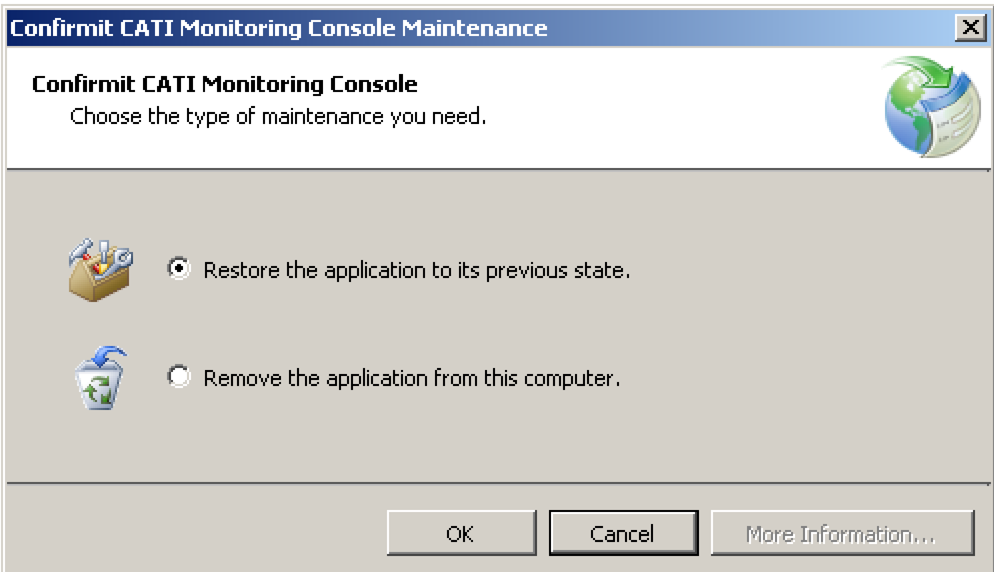



*Figure 148 CATI Monitoring Console maintenance dialog*

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.

### 6.3.4 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 you should install and launch the CATI Monitoring Console application. Refer to Downloading the CATI Monitoring Console Installation Files on page 126 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.

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 126 for description of the CATI Monitoring Console application download and installation procedures.

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 observe 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 135 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 feature is 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.

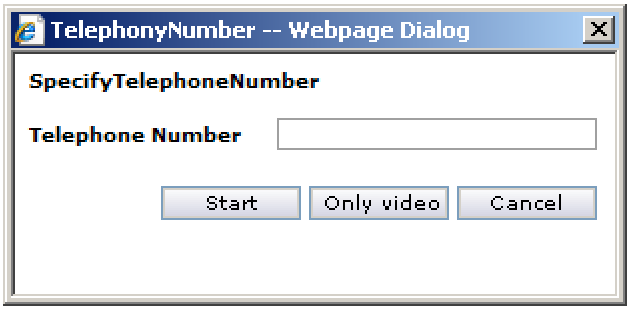



***Figure 149 Choosing the monitoring options - with or without listening***

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.

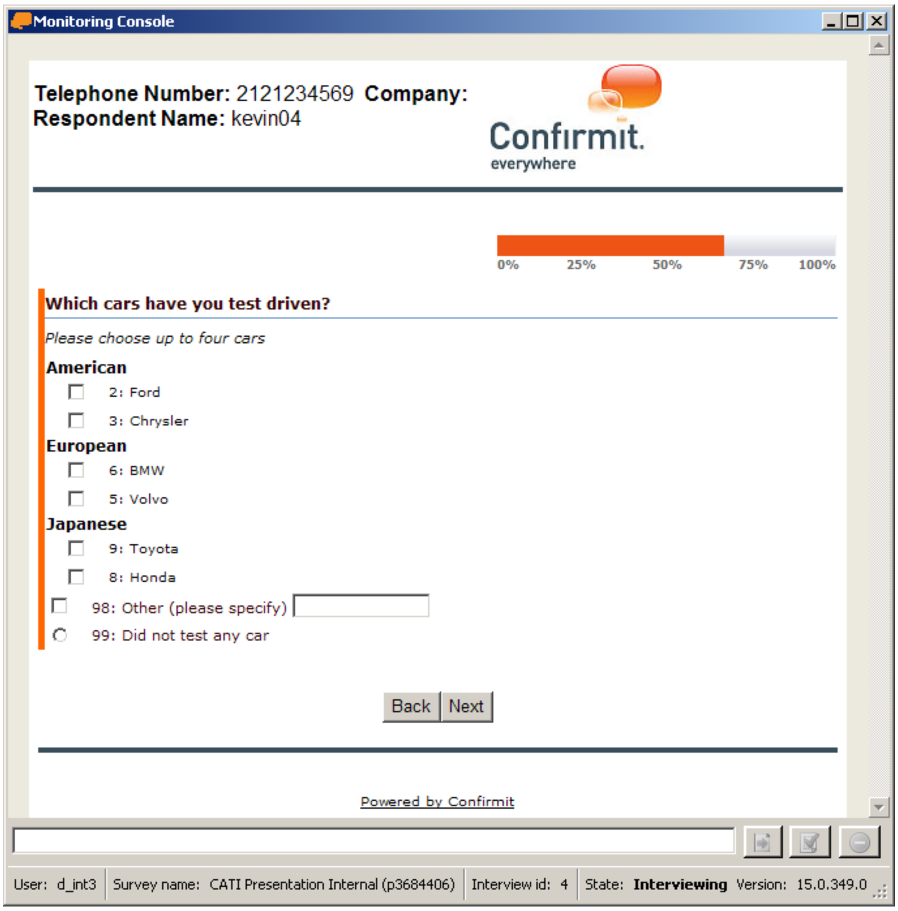



***Figure 150 The Monitoring Console window displaying the monitored interview***

The supervisor cannot perform any action in this window. He/she can only watch how the interview proceeds.

3. Press the Stop monitoring button 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.

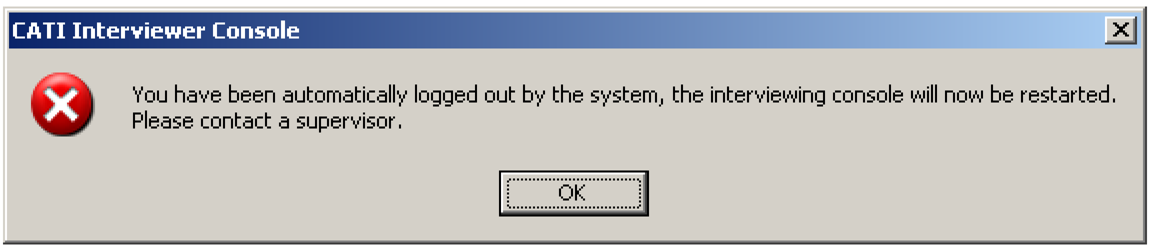



***Figure 151 Warning message displayed to the interviewer after the interview has been terminated by the supervisor***

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.

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.

## 6.3.5 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 depending on which object he works with in the CATI console. Messages can be sent in the following situations:

- from the Interviewers tab - to the selected interviewers, or to the selected interviewer groups;
- from the Surveys tab - to all interviewers assigned to the selected project;
- from the Interviewer List window (Activity Views object) - to the particular interviewer;
- from the Survey List window (Activity Views object) - to all interviewers assigned to the selected project

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.

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;
- 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.

Basically there are two ways you can create and send a message to the interviewers:

- from the Surveys and Interviewers tabs, by using the context command
- from the Activity Views tab, when the corresponding icon is pressed in the Interviewer or Survey list

Please refer to 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 Interviewer object in the list in the Navigation frame (see See "Interviewer management" on page 12 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.

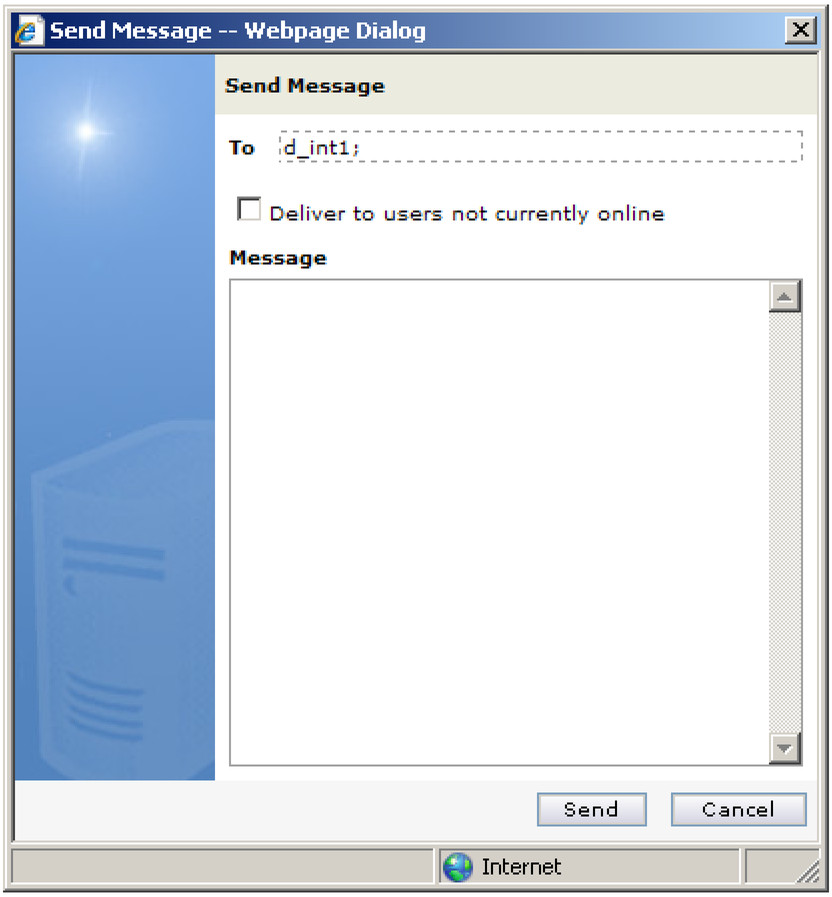



***Figure 152 Sending message to interviewers***

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.
4. Selected survey names will all be displayed in the To field separated by semicolons.
5. See See "Send Message dialog window." on page 133 for this dialog window description. The procedure used to send a message is similar to the one described there.

**The message you send from the Surveys tab is sent to ALL interviewers assigned to the selected survey(s) regardless of whether they are currently logged in or not - such option is not available in this situation.**

**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 See "Monitoring interviewers and their work" on page 123).
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 See "Send Message dialog window." on page 133 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 See "Monitoring surveys and survey related events" on page 119).
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 See "Send Message dialog window." on page 133 for this dialog window description. The procedure used to send a message is similar to the one described there.

**The message you send from the Surveys List dialog window (in Activity Views) is sent to ALL interviewers assigned to the selected survey regardless of whether they are currently logged in or not - such option is not available in this situation.**

## 6.3.6 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, 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.

**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 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 recording* option should be enabled in Confirmit Authoring module. If this option is not enabled, the interview process will not be recorded at all. The Dialer should be in the "*available and operational*" state. If the Dialer is not in the "*available and operational*" state, telephone conversations held in the course of the interviews would not be recorded.**

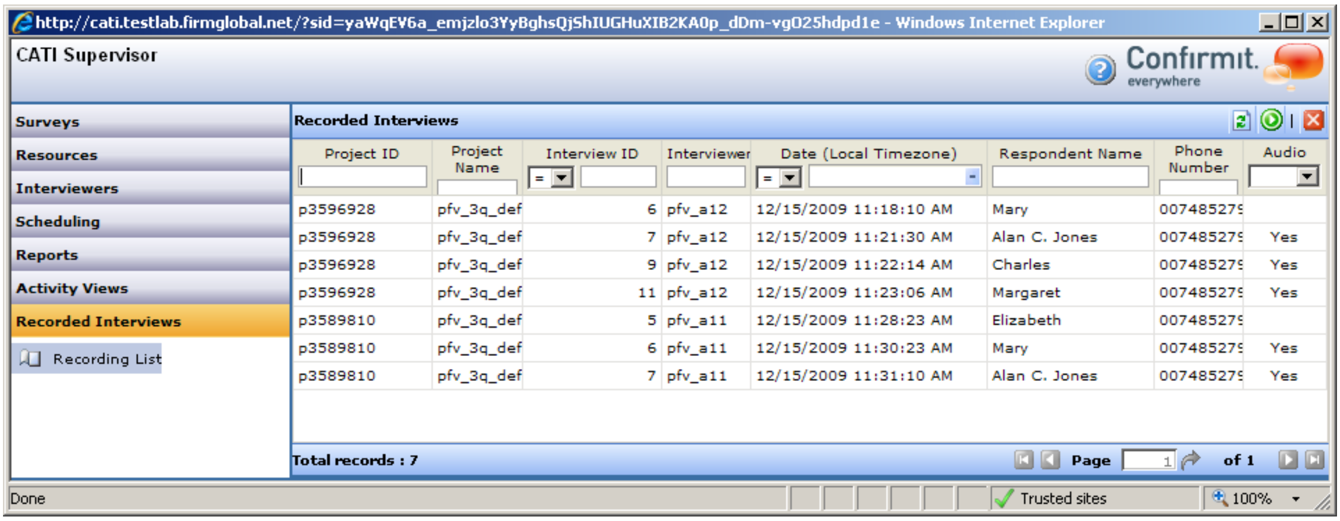
Please refer to Enabling the Dialer on page 151 for instructions on enabling the Dialer and checking its current state.

After the **Enable whole interview recording** option (in Confirmit Authoring) is enabled, all interviews would be recorded automatically.

Recorded interviews are stored on the server for 30 days, and they are deleted after this period expires.

**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 126 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 top 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:

- Project ID
- Project name
- Interview ID
- Interviewer name
- Interview date (for the local timezone)
- Respondent name
- Respondent phone number
- Audio recording availability

4. To start playing the recorded interview you should select it in the list of the Recorded Interviews and either right-click the selected interview and choose Play from the context menu, or press the Play button  in the toolbar above the list.
5. 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.
6. After the file is opened either from the server, or from your local computer, the CATI Supervisor Player starts.

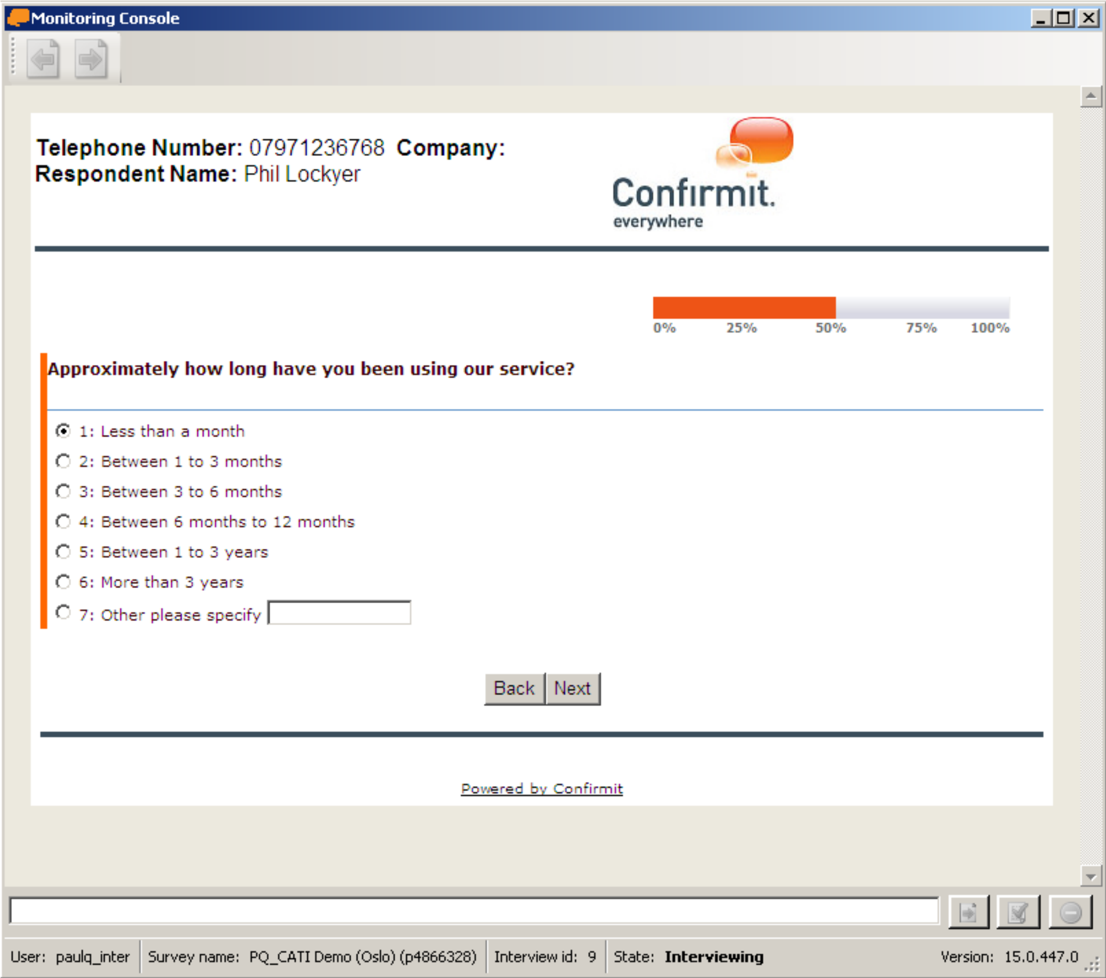



***Figure 153 Recorded interview displayed in the CATI Supervisor Player***

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. One stroke takes you about 2 seconds correspondingly back or forth in the audio track.

When the playback finishes, the Supervisor Player window goes blank.

7. 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.

## 6.4 Monitoring appointments

To monitor appointments supervisor has to choose the Appointment List object (see Choosing an object to monitor on page 118). 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.

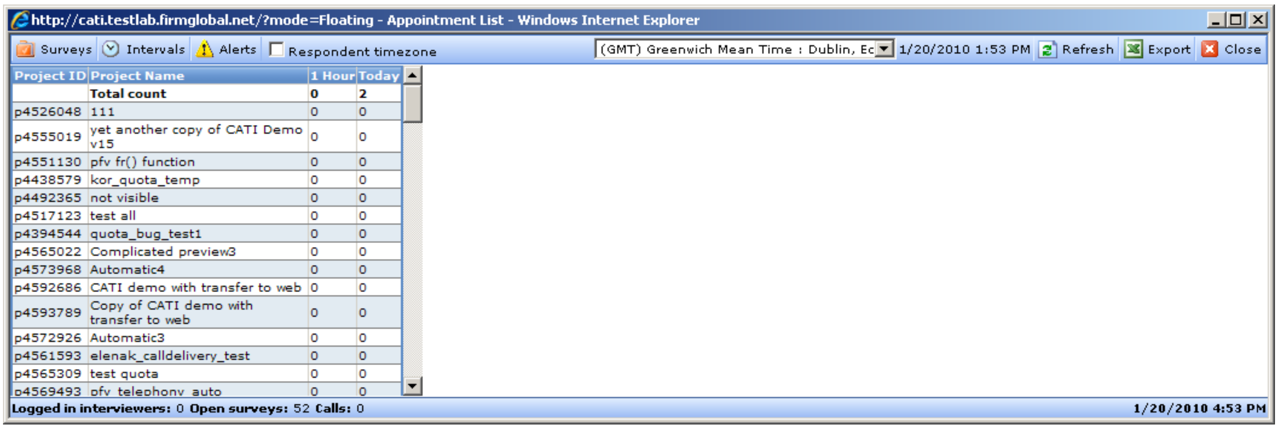
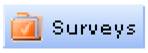



*Figure 154 Activity Views - Appointment List dialog window*

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

- Project ID
- Project Name
- Short period value
- Long period value

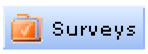
The Appointment List dialog window also contains a toolbar with the following buttons.

| Button | Description | Function |
|---|---|---|
|  | SELECT SURVEYS | Displays the survey selection form. Allows selecting surveys for which the list of appointments is displayed in the grid. |
|  | SET APPOINTMENT INTERVALS | Displays the monitoring intervals for appointments and allows specifying appointments. |
|  | SET APPOINTMENT ALERTS | Displays the appointment alert form. Allows specifying alert threshold for one parameter. |
| Checkbox | RESPONDENT TIME-ZONE | 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. |
|  | REFRESH | Allows updating the appointment list manually. |
|  | EXPORT | Exports current appointment list in MS Excel format. |
|  | CLOSE WINDOW | Closes the Appointment List dialog window. |

## 6.4.1 Selecting appointments to display in the grid in the Appointment List window

Supervisor can choose surveys for which the list of appointments should be displayed in the grid. This can be done with the help of the Survey Search form using which supervisor can search for surveys by their names, or can apply filter to the survey list.

**To select surveys for displaying in the appointment list:**

1. Press the Surveys button  on the toolbar.

   This will display the Survey Search form below the button.

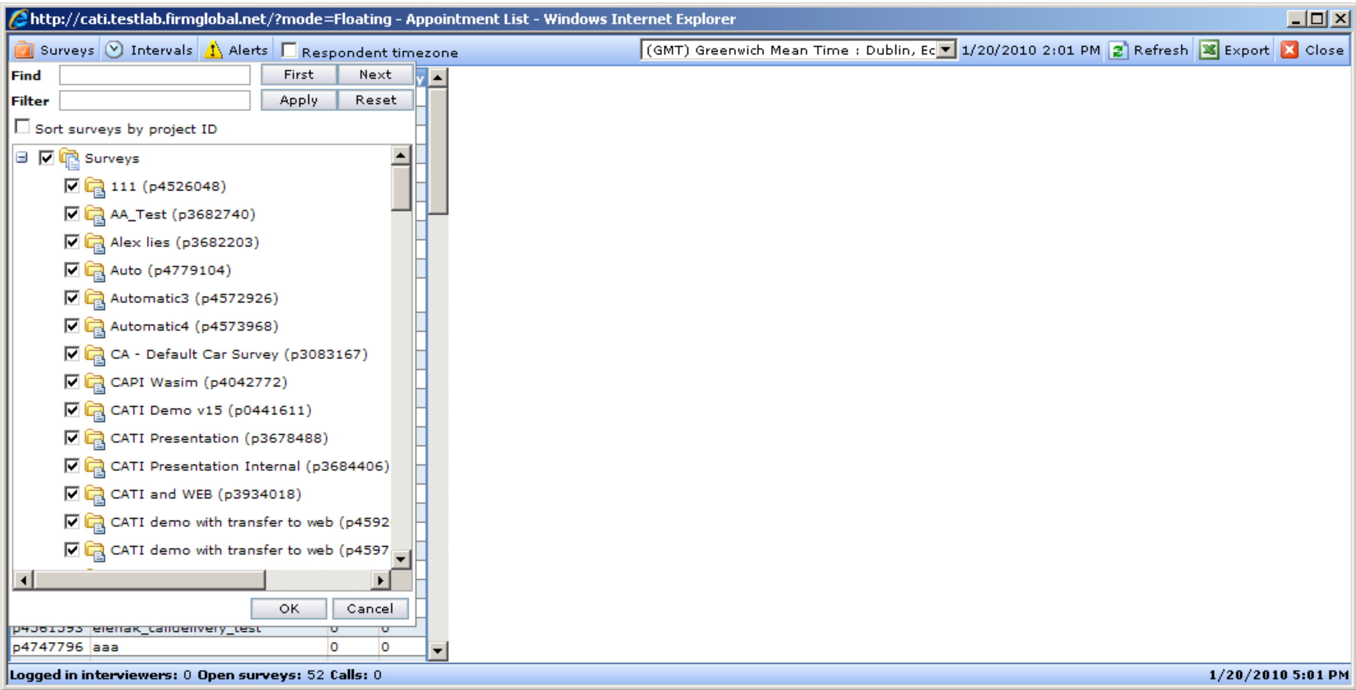



*Figure 155 The Survey search form - selecting surveys for the Appointment List*

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.

## 6.4.2 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.

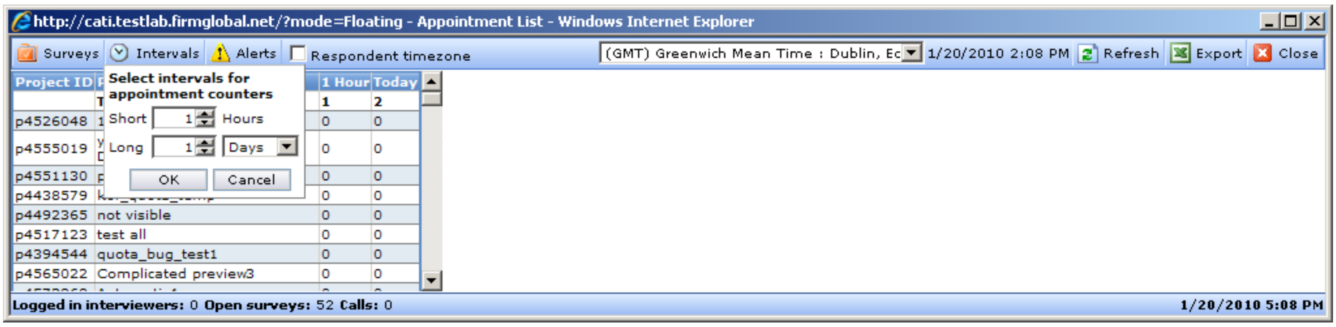



*Figure 156 Setting up intervals for appointment counters*

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 the amount of appointments for each survey that fall within specified periods.

## 6.4.3 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 62). 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.

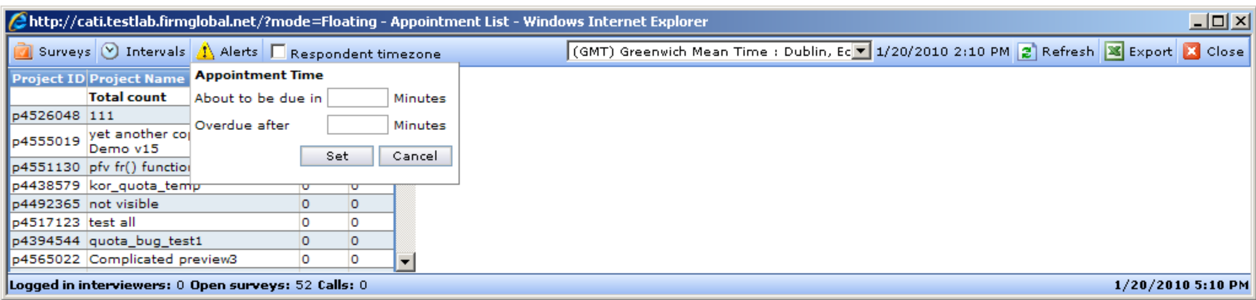



*Figure 157 Setting up appointment alerts*

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).

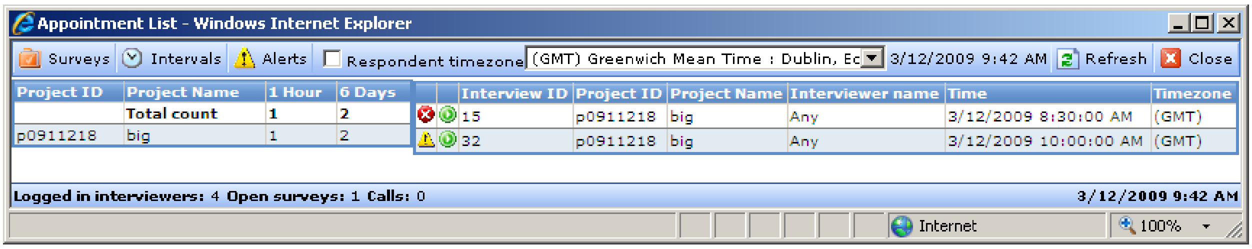



***Figure 158 Monitoring the appointment alerts***

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).

### *6.4.3.1 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 62.

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 62 for detailed instructions on activating the interview.

# 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
- Dialler
- Master Timezone List
- Active Timezone List
- About CATI Supervisor (only 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. See See "Displaying the list of the Resources objects of the particular type" on page 142 for instructions on viewing the Resources objects list.

## 7.1 Displaying the list of the Resources objects of the particular type

**To display the list of the Resources objects:**

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 item, or
   - Right-click the Resources item 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.

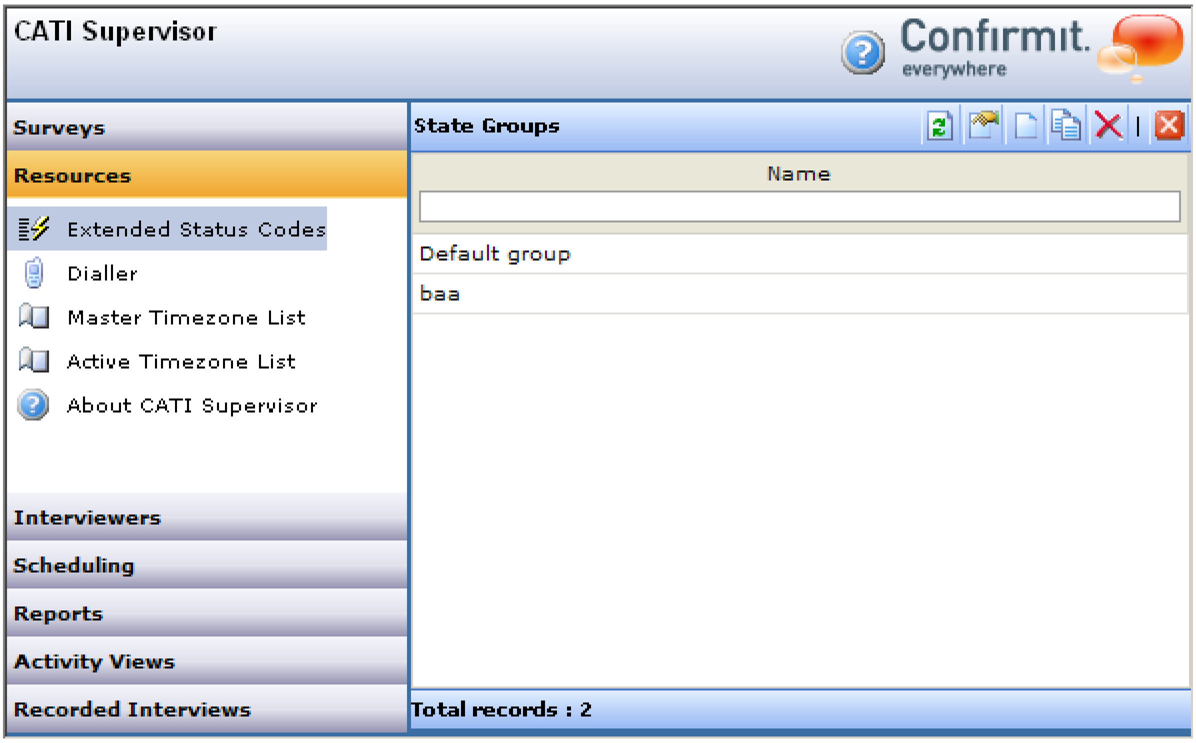



*Figure 159 The Resources object type list*

## 7.2 Configuring the Extended Status Codes

Extended Status Codes are used to indicate current status of an interview/call. Please see Call Management on page 51 for information on how Extended Status Codes are used with interviews and calls.

The CATI Supervisor module allows separating Extended Status Codes into groups for conveniency. Usually status codes are applied as a set containing all the required statuses. It is convenient to separate such set into a group of Extended Status Codes.

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.

### 7.2.1 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.

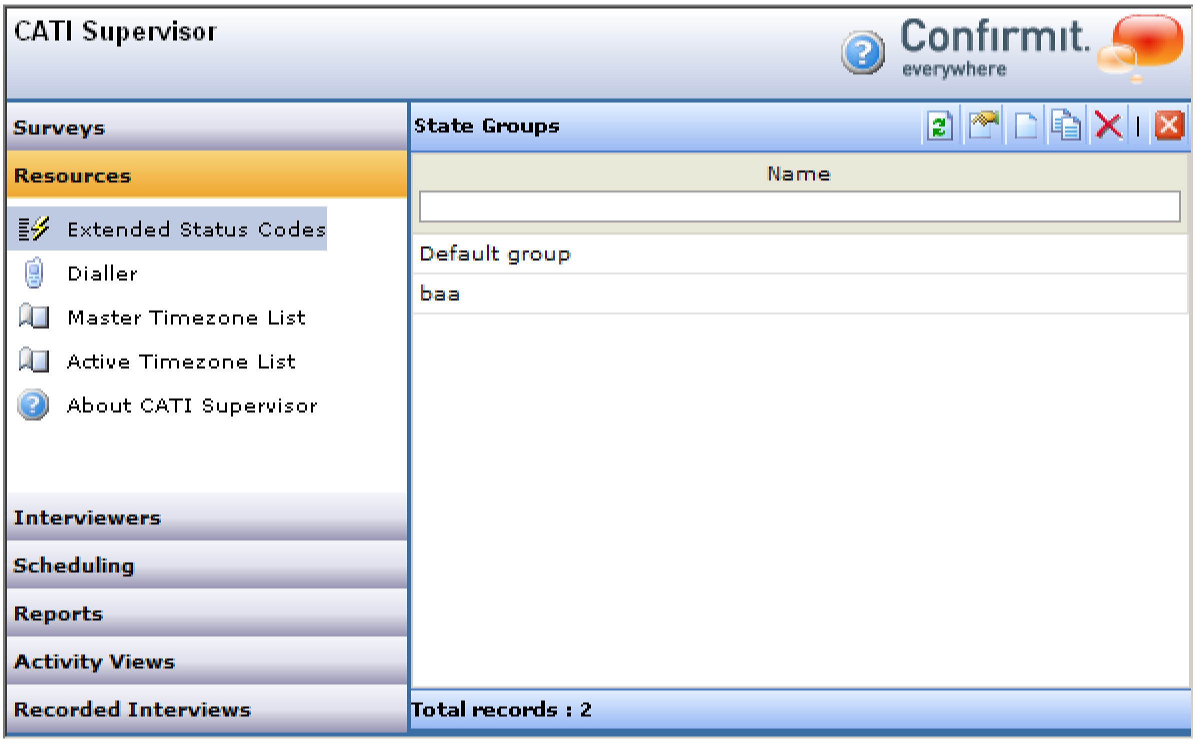



*Figure 160 Viewing the Extended Status Code group list in the top right frame*

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 |

### 7.2.2 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.

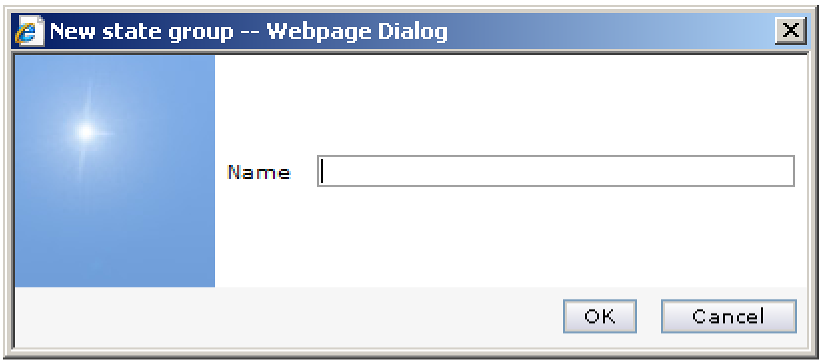



*Figure 161 Adding a new extended status group to the list*

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 Status Codes – you cannot change this set contents using the CATI Supervisor interface. Only some of the Extended Status Code properties are editable – see Viewing and modifying the Extended Status Code group properties on the facing page for details.

## 7.2.3 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.

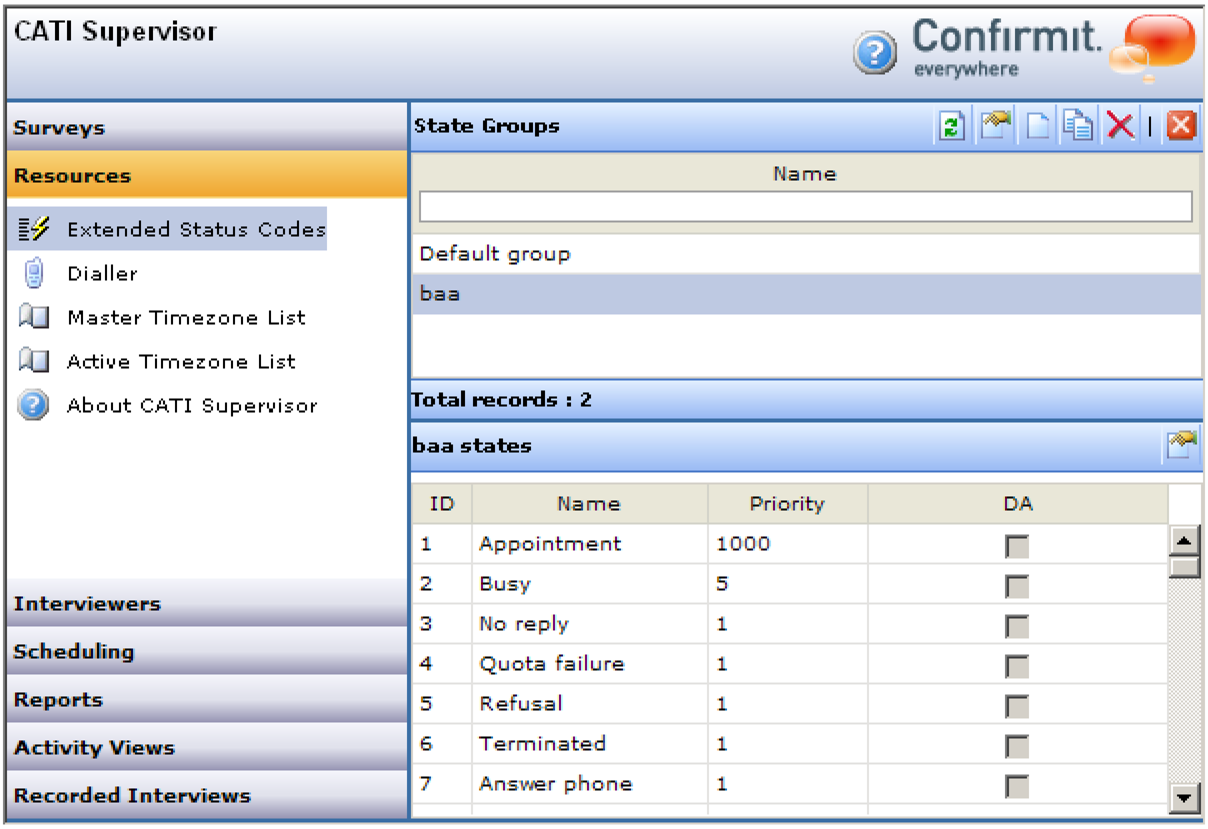



***Figure 162 Viewing the extended status list***

The list of extended statuses normally contains a set of 30 predefined statuses, which ID and name cannot be changed. These statuses are contained in each extended status group, and each new group added to the list already contains such a set. Predefined extended statuses are assigned ID of 1 through 30. All the rest statuses can be edited – with the exception of ID value.

**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.

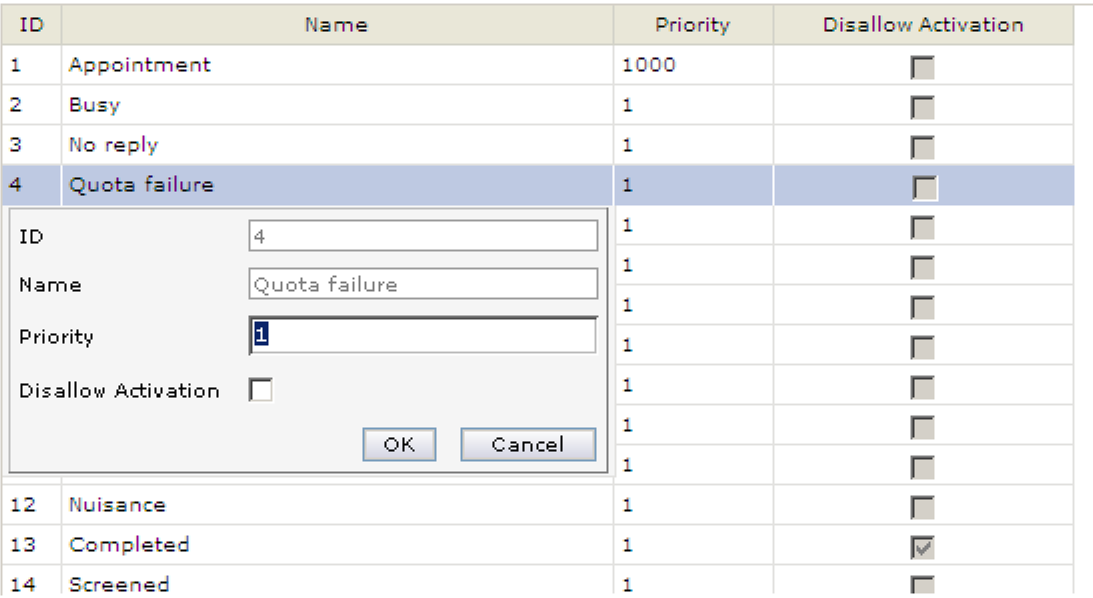



***Figure 163 Modifying the extended status properties***

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 52 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.

### 7.2.4 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.

## 7.3 Configuring the Master Timezone list

Master Timezone list includes officially used timezones that are available for activation in the CATI Supervisor module, i.e. that are not directly used with any other CATI object. Supervisor can quickly select a timezone from this list and make it “active”. Active timezones can be used as object properties – for example, an active timezone can be specified as the respondent timezone. Also refer to Configuring the Active Timezone list on page 148 for instructions.

For information on the bias offset for a timezone and for a complete reference list of timezones please see Appendix E on page 181.

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.

## 7.3.1 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.

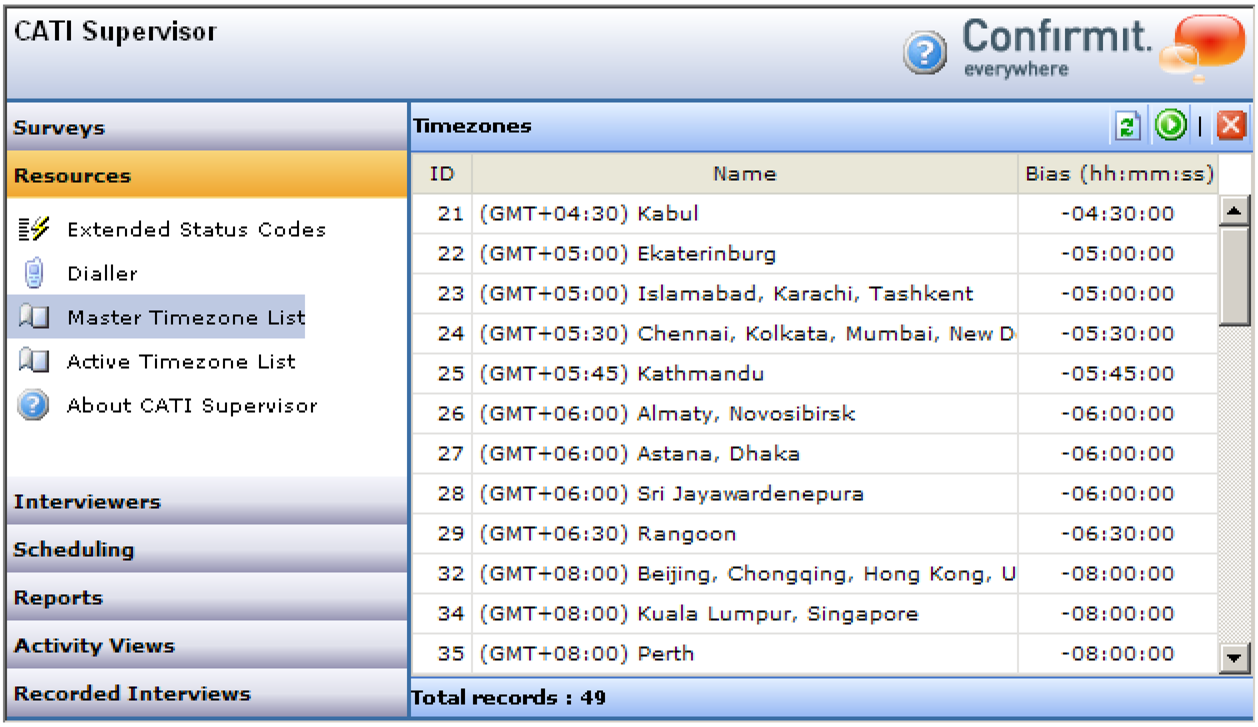



***Figure 164 Viewing the Master Timezone list in the top right frame***

The grid contains the following columns:

- ID
- Name
- Bias

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 |

## 7.3.2 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.

## 7.4 Configuring the Active Timezone list

Active Timezone list includes timezones that are activated, i.e. they can be directly used with any other object. Supervisor can quickly select an active zone from the list and use it as an object property – for example, an active timezone can be specified as the respondent timezone. Also refer to Configuring the Master Timezone list on page 146 for instructions.

For information on a timezone bias and for a complete reference list of timezones please see Appendix E on page 181.

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.

### 7.4.1 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.

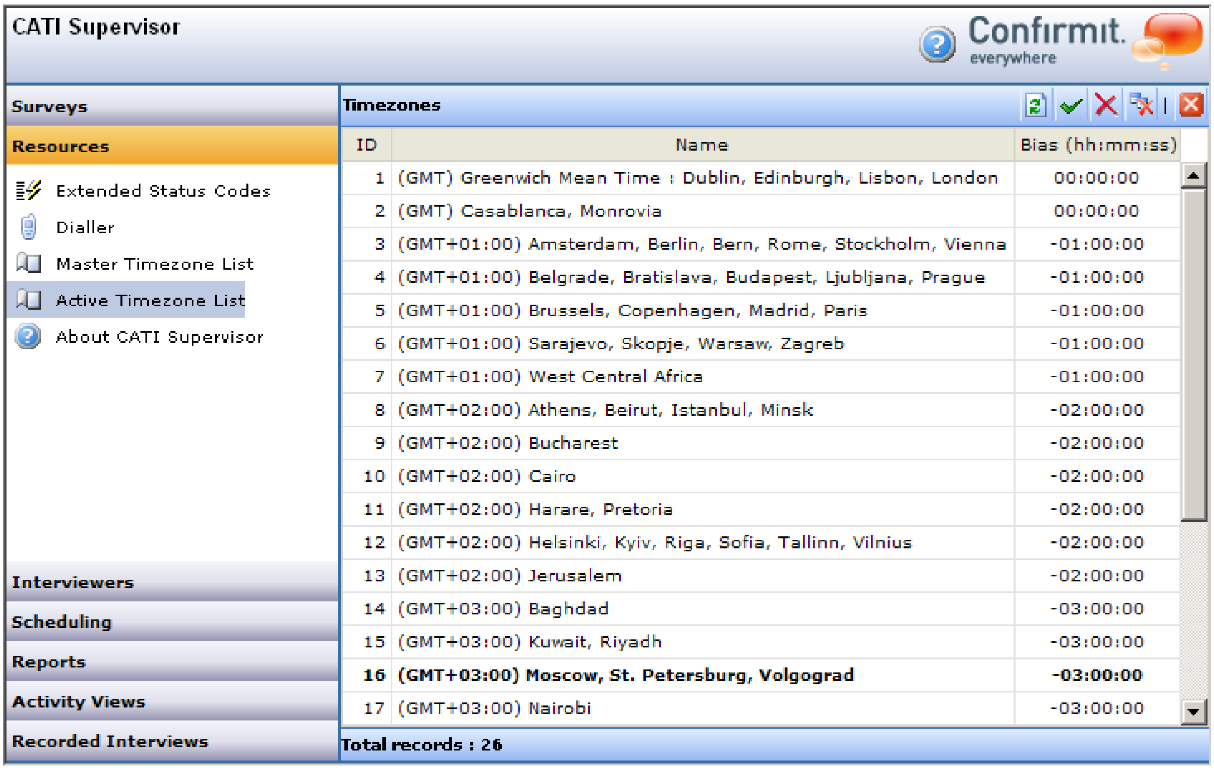



*Figure 165 Viewing the Active Timezone list in the top right frame*

The grid contains the following columns:

- ID

- Name
- Bias

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 |

### 7.4.2 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.

### 7.4.3 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.

### 7.4.4 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).

## 7.5 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.

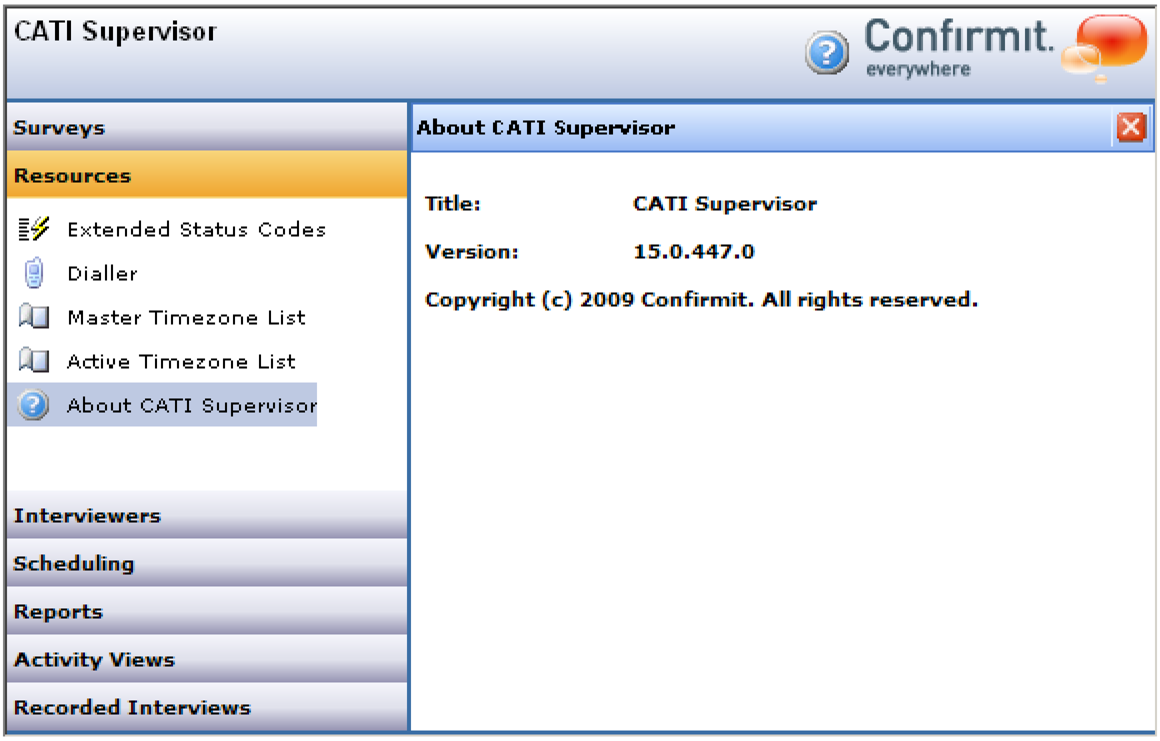



*Figure 166 Viewing the general software information*

## 7.6 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 the dialing system is a third party service provided by a telephone company, an internet service provider etc.

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.

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 the Dialer on the facing page for instructions).

The CATI Supervisor module monitors the current Dialer state and displays this information (see Enabling the Dialer on the facing page 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 Console and Logging In on page 96 for instructions.

The Dialer operates in one of the four dialing modes. Such 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, the Dialer will operate only in this mode with this survey until the dialing mode is changed.

The following dialing modes are available:

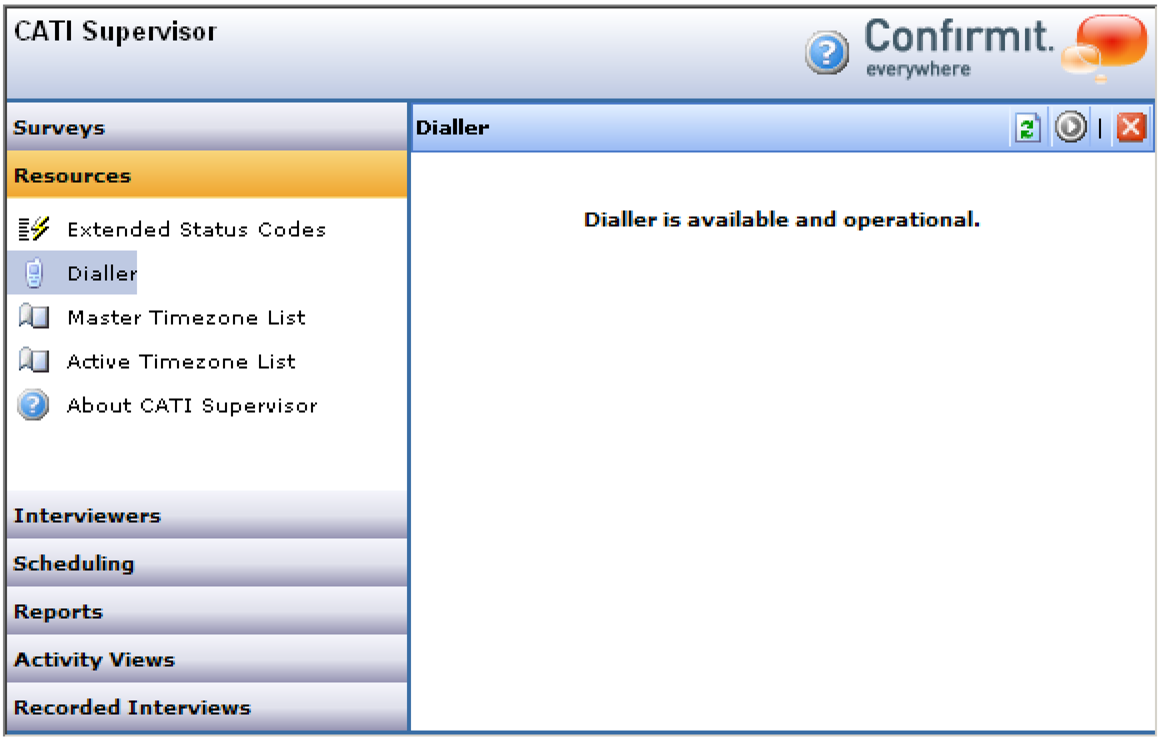
- Manual - assumes that the dialer dials only the number corresponding to the interview manually selected by the interviewer;
- Preview - assumes that the CATI Interviewer Console displays some information for the interviewer which he should view before proceeding, and the Dialer dials the number corresponding 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 - 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 it could be delivered to the interviewer precisely after he finishes the previous interview.

### 7.6.1 Enabling the Dialer

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

The Dialer is enabled by the Supervisor - see instructions below.

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 top right frame of the CATI Supervisor module when the Dialer object is selected (in the Resources object group in the Navigation Menu) - see the picture below.




This status 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, could not 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:

- Available and operational - the Dialer is enabled and accessible. Normal status - interviewers can engage the dialer. No action is required.
- Not available and not operational - the Dialer is inaccessible and cannot be enabled at the moment. The Supervisor should wait until the status changes to "Available but not operational", and then enable the dialer.
- Available but not operational - the Dialer is accessible but is not enabled. 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.
2. If the message in the top right frame says "Available but not operational" press the Enable Dialer button  on the toolbar.
3. The top right frame refreshes and the Dialer status message should change to "The Dialer is available and operational". If the message does not change press the Refresh button on the toolbar. If the status is still set to "Available but not operational" 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 state is set to "Available and operational".

# 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
- Survey Productivity report
- Sample status summary report
- Call Attempt Log

- Interviewer Productivity Report
- Attempts by Disposition report
- Number of attempts report

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 and simultaneously in the top right frame. The same 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.

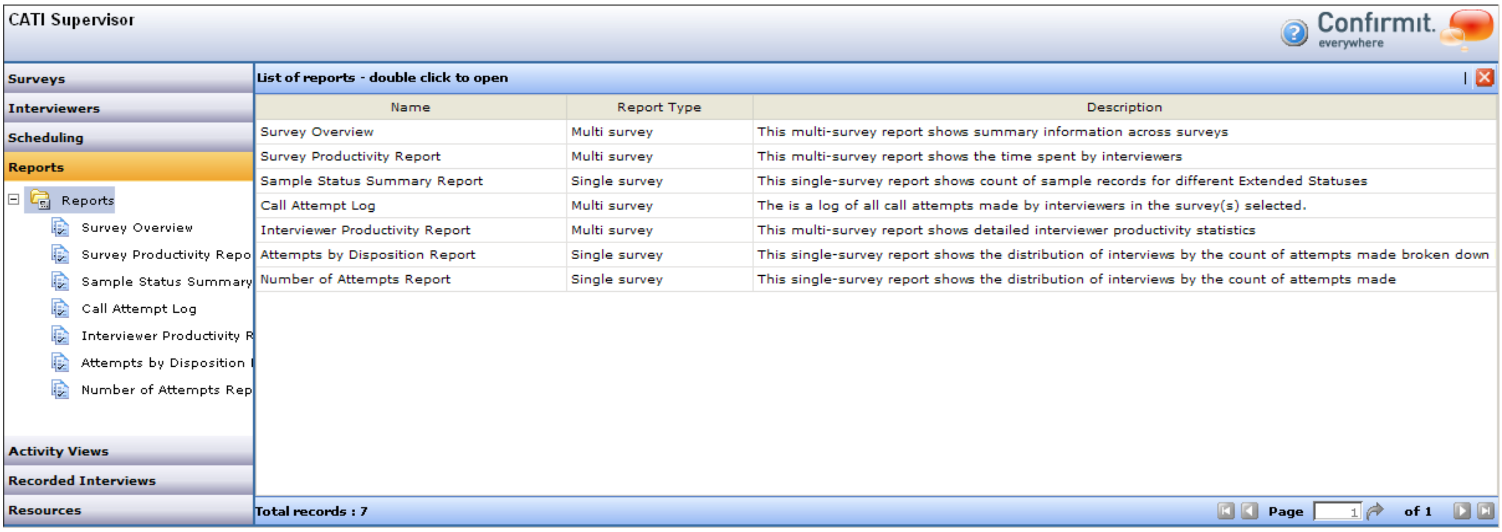



*Figure 167 The Reports object type list*

## 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.

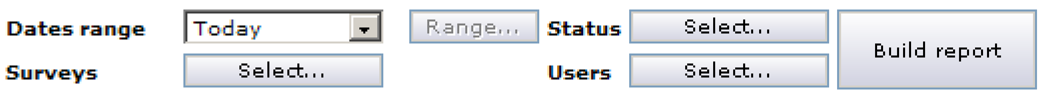



***Figure 168 Configuring the Survey Productivity Report***

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.

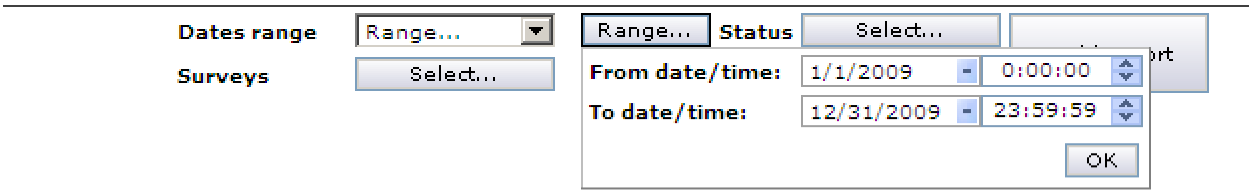



***Figure 169 Choosing the date range for the Survey Productivity Report***

   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.

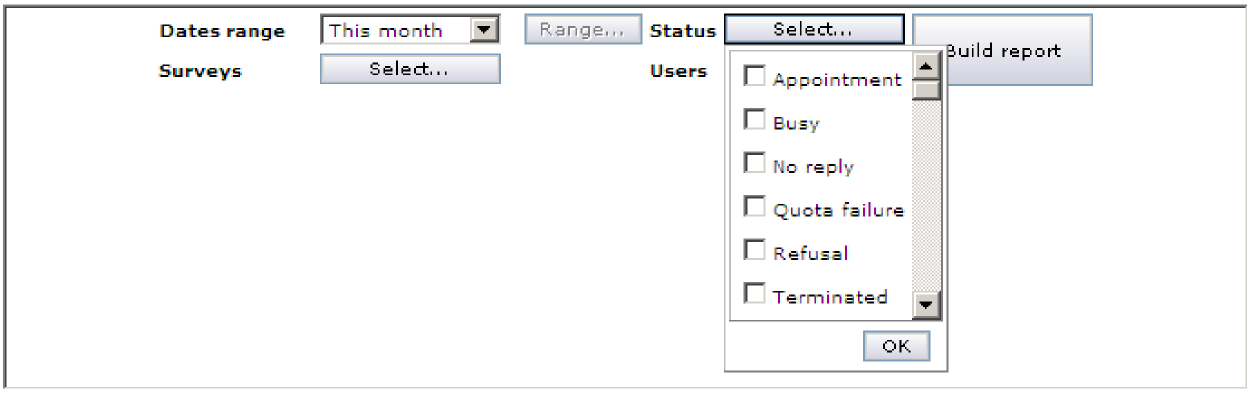



*Figure 170 Selecting extended statuses to include into the Survey Productivity Report*

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 120). 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.

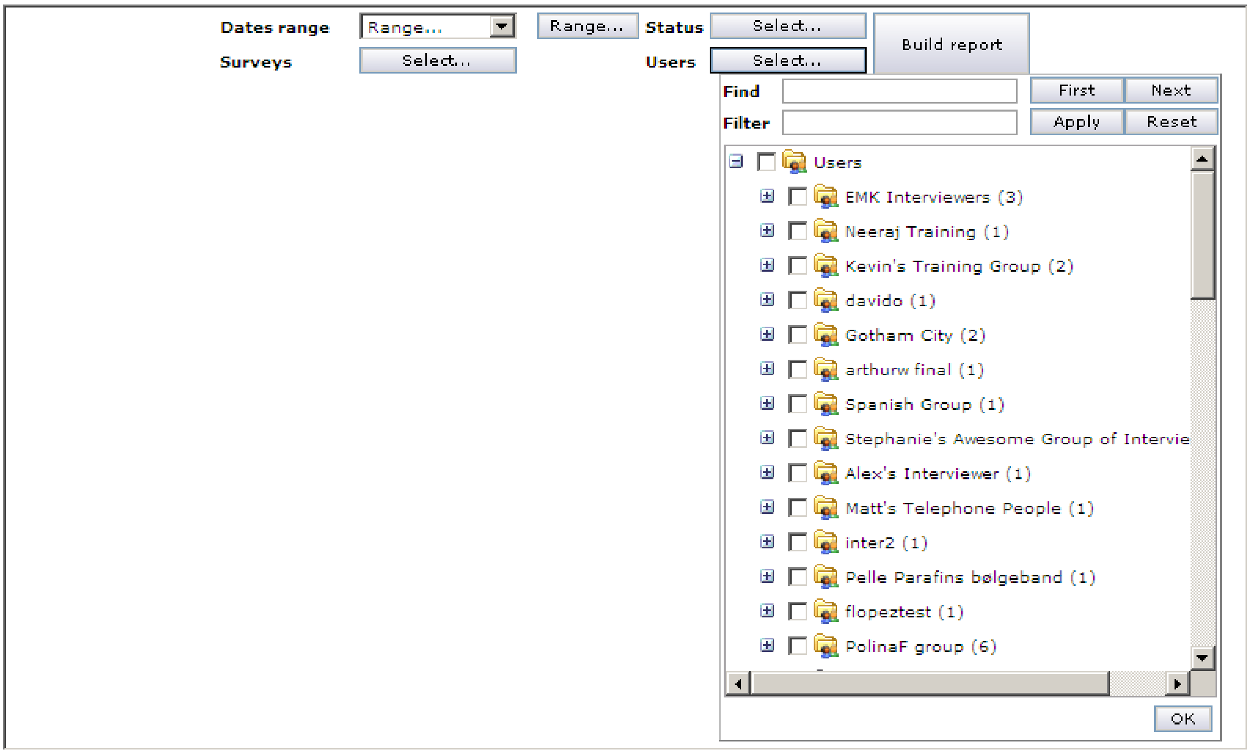



*Figure 171 Selecting users to include into the Survey Productivity Report*

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.

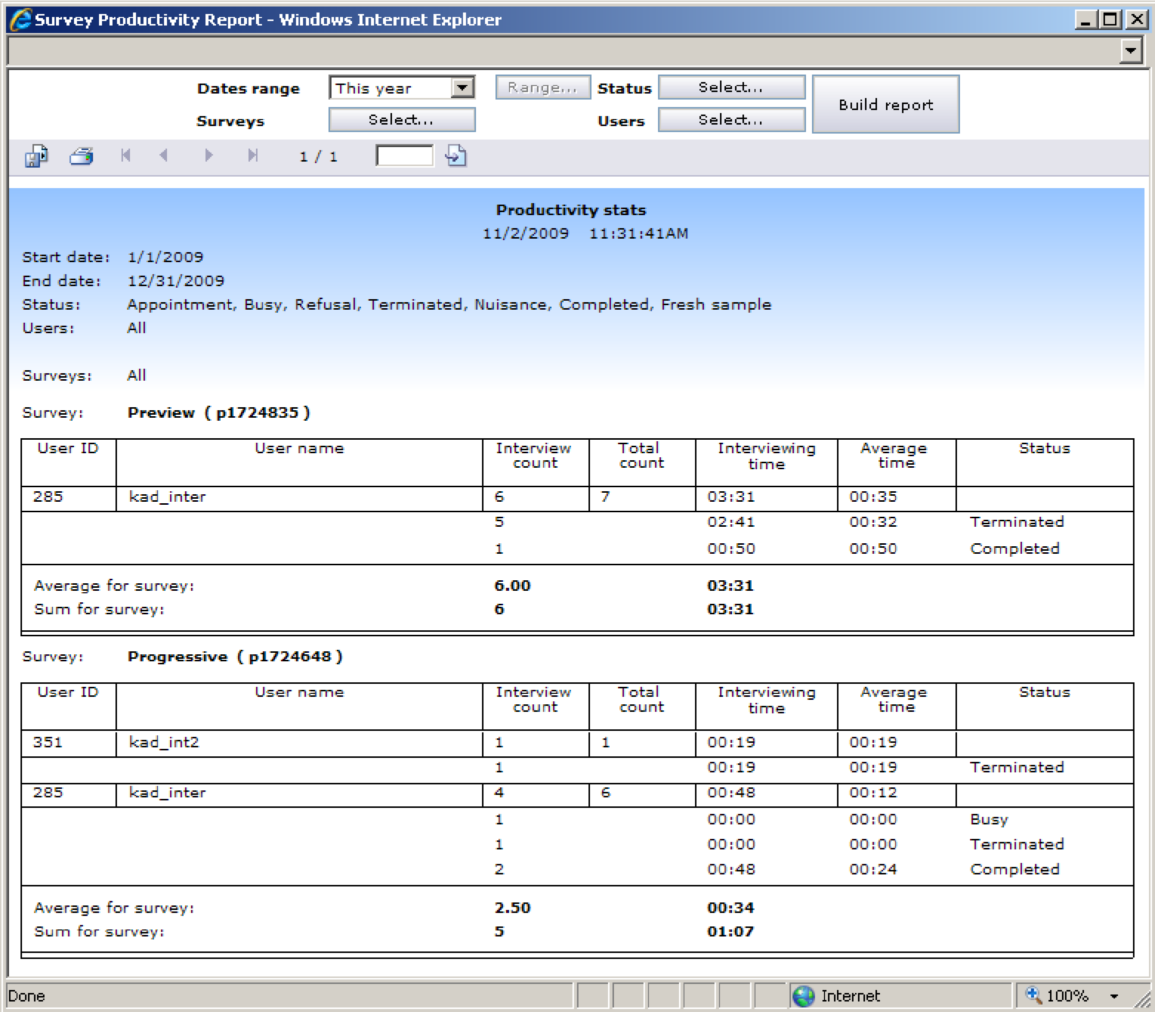



***Figure 172 The generated Survey Productivity Report***

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 First button to jump to the first report page, press the Previous button to jump one page back, press the Next button to jump one page forward, or press the Last button to jump to the last report page.

   Numbers to the right of these buttons show the current page number and the total number of pages in the report.

   You can also jump to the specified report page – enter the page number in the Go To field and press the Go To button to do this.

8. The generated report can be exported and printed out – refer to Exporting the generated report on page 172 and Printing out the generated report on page 173 for instructions.

## 8.2 Generating the Survey Overview Report

The Survey Overview 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 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 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 Overview from the context menu that appears.

   This will display the Survey Overview Report settings in the top right frame.

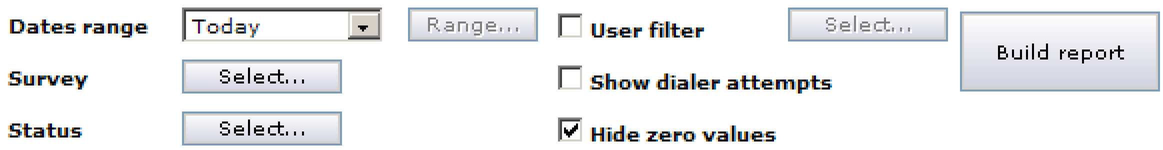



***Figure 173 Configuring the Survey Overview Report***

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.

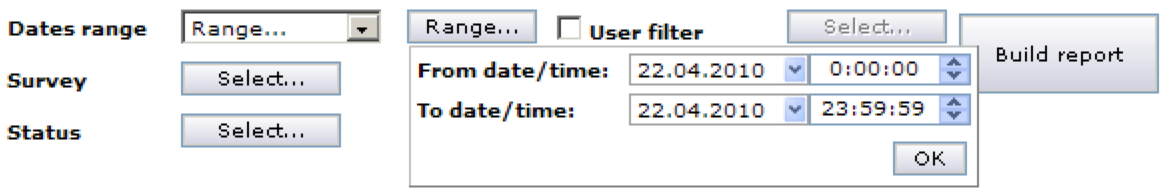



***Figure 174 Choosing the date range for the Survey Overview Report***

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.

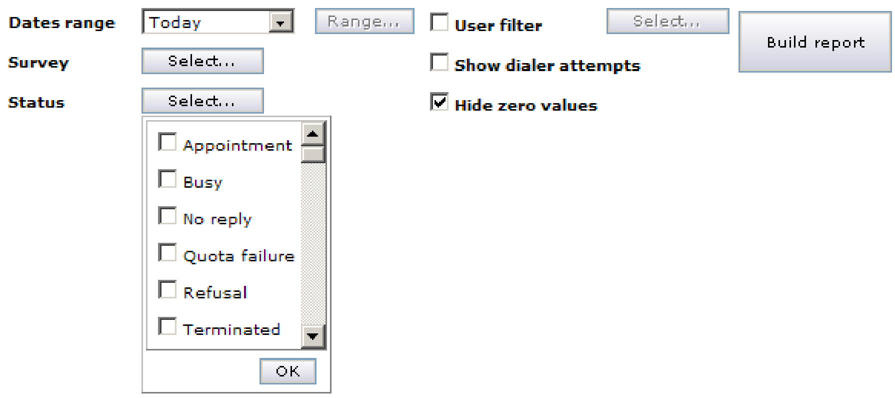



***Figure 175 Selecting extended statuses to include into the Survey Overview Report***

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 120). 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.

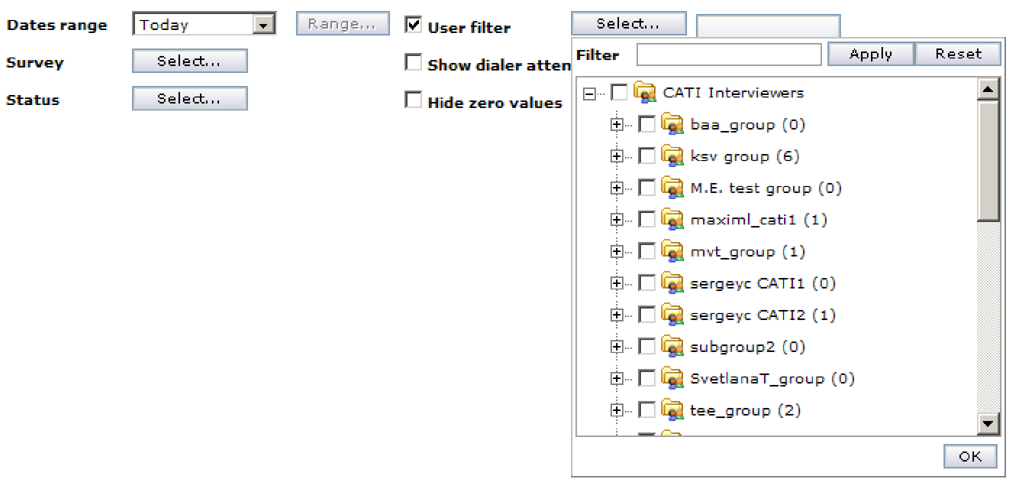
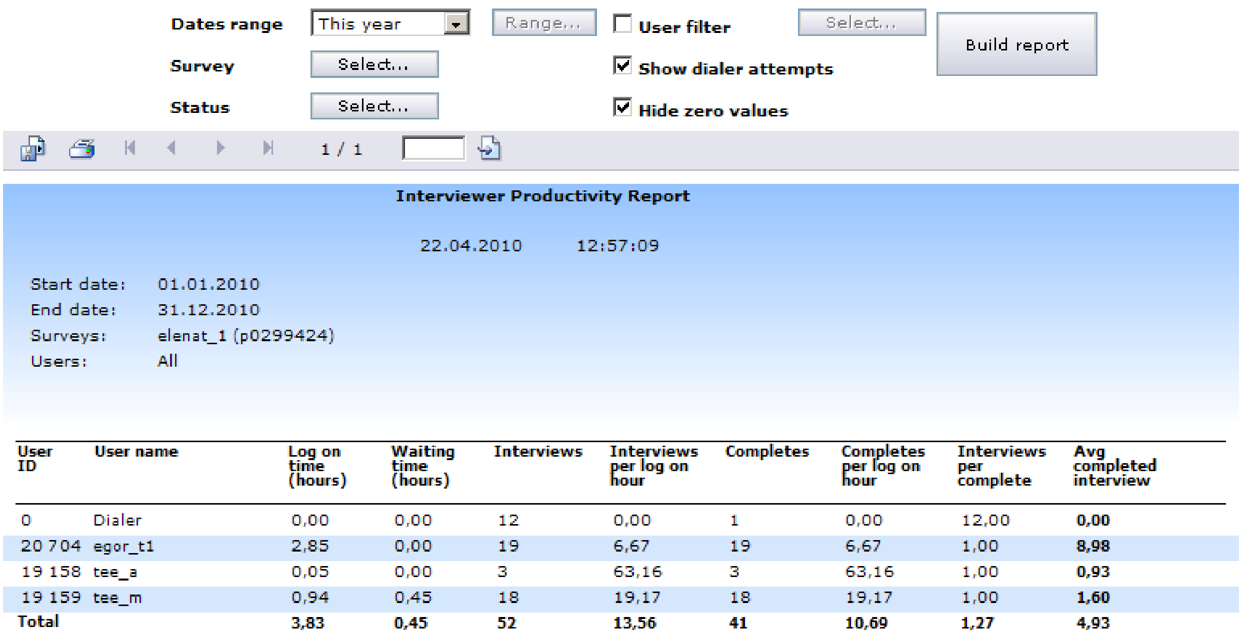



***Figure 176 Selecting users to include into the Survey Overview Report***

   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.




| User ID | User name | Log on time (hours) | Waiting time (hours) | Interviews | Interviews per log on hour | Completes | Completes per log on hour | Interviews per complete | Avg completed interview |
|---|---|---|---|---|---|---|---|---|---|
| 0 | Dialer | 0,00 | 0,00 | 12 | 0,00 | 1 | 0,00 | 12,00 | 0,00 |
| 20 704 | egor_t1 | 2,85 | 0,00 | 19 | 6,67 | 19 | 6,67 | 1,00 | 8,98 |
| 19 158 | tee_a | 0,05 | 0,00 | 3 | 63,16 | 3 | 63,16 | 1,00 | 0,93 |
| 19 159 | tee_m | 0,94 | 0,45 | 18 | 19,17 | 18 | 19,17 | 1,00 | 1,60 |
| Total | | 3,83 | 0,45 | 52 | 13,56 | 41 | 10,69 | 1,27 | 4,93 |

*Figure 177 The generated Survey Overview Report*

7. 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 First button to jump to the first report page, press the Previous button to jump one page back, press the Next button to jump one page forward, or press the Last button to jump to the last report page.

   Numbers to the right of these buttons show the current page number and the total number of pages in the report.

   You can also jump to the specified report page – enter the page number in the Go To field and press the Go To button to do this.

8. The generated report can be exported and printed out – refer to Exporting the generated report on page 172 and Printing out the generated report on page 173 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 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/Sample Status Summary Report from the context menu that appears.

   This will display the Sample Status Summary Report settings in the top right frame.


***Figure 178 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 120). 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.

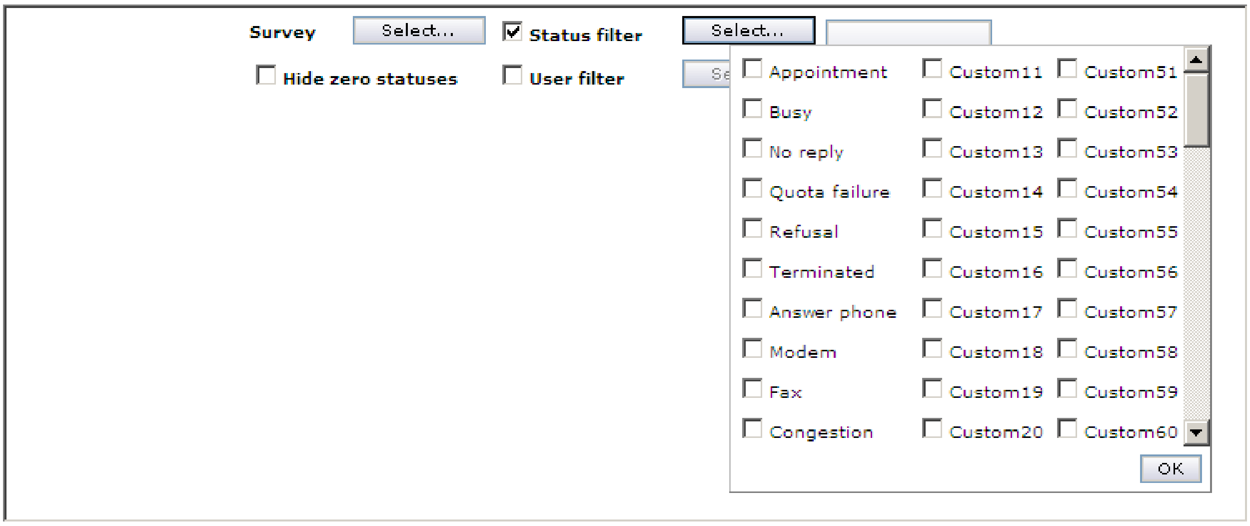



***Figure 179 Applying extended status filter to the Sample Status Summary Report***

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.

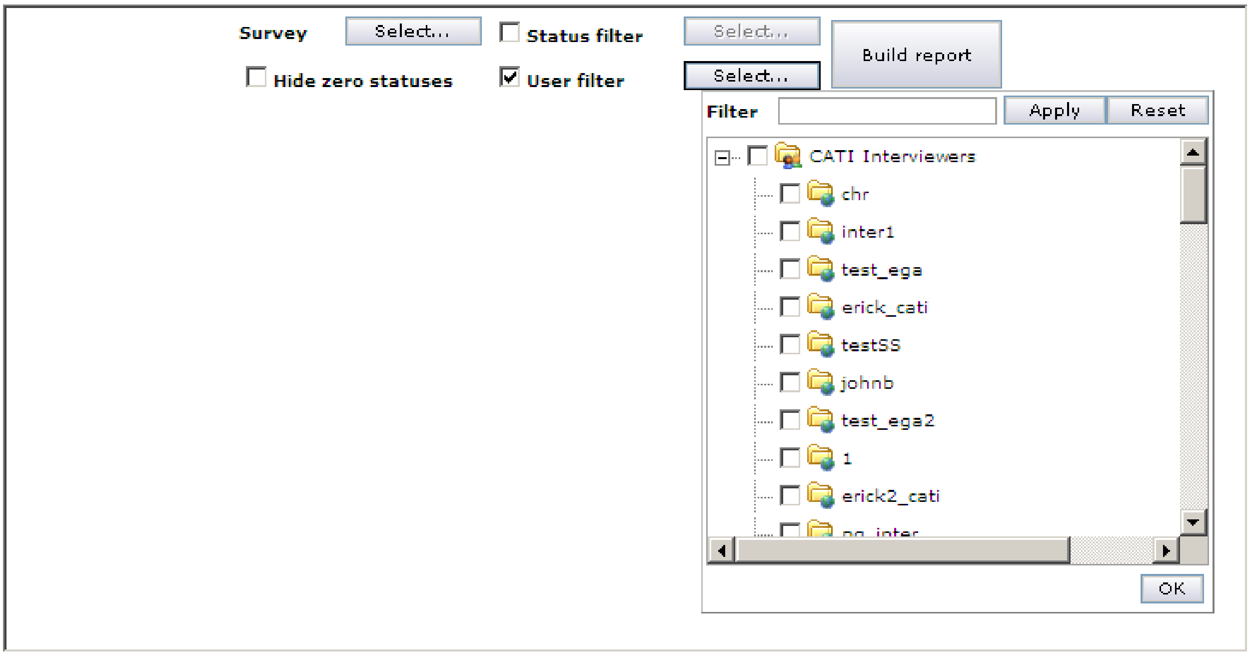



*Figure 180 Applying the user filter to the Sample Status Summary Report*

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 120). Press OK to save this setting.

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

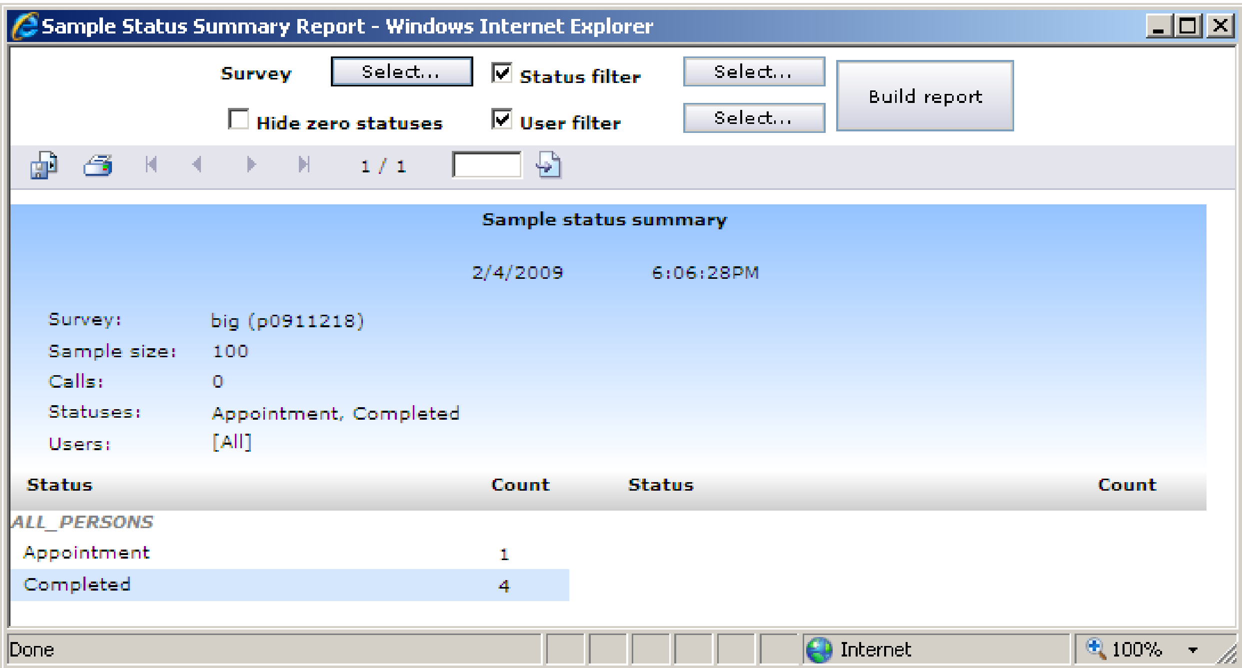



*Figure 181 The generated Sample Status Summary Report*

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 First button to jump to the first report page, press the Previous button to jump one page back, press the Next button to jump one page forward, or press the Last button to jump to the last report page.

Numbers to the right of these buttons show the current page number and the total number of pages in the report.

You can also jump to the specified report page – enter the page number in the Go To field and press the Go To button to do this.

1. The generated report can be exported and printed out – refer to Exporting the generated report on page 172 and Printing out the generated report on page 173 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 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.

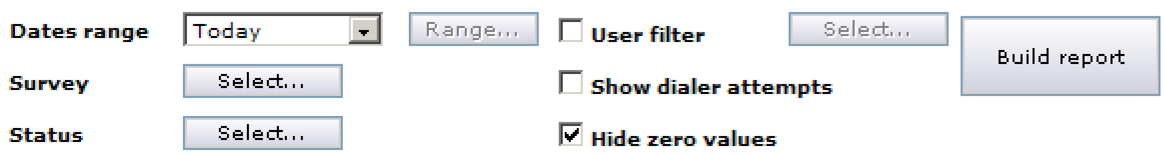



***Figure 182 Configuring the Interviewer Productivity Report***

   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 120). 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.

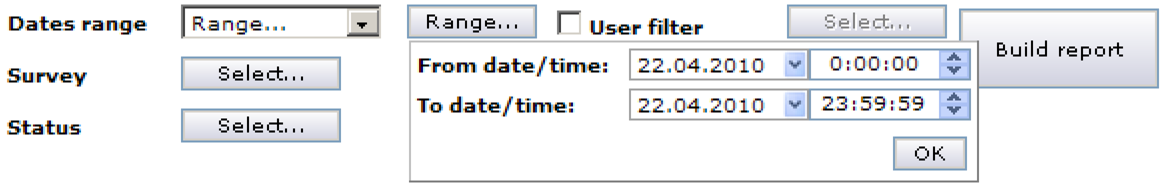



***Figure 183  Choosing the date range for the Survey Overview Report***

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.

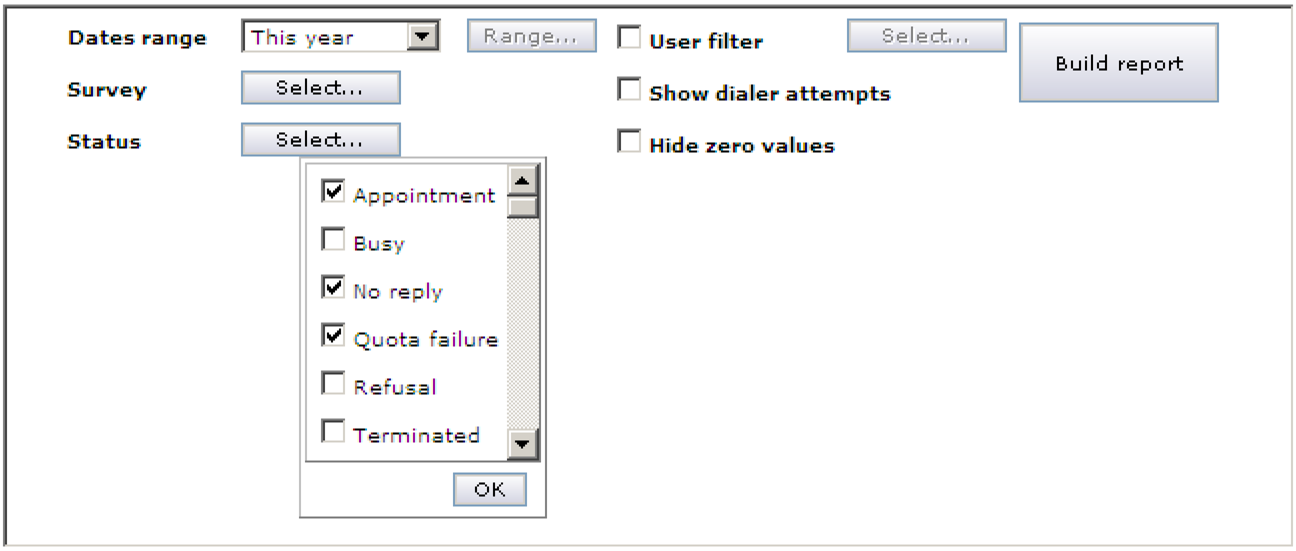



***Figure 184  Selecting extended statuses to include into the Interviewer Productivity Report***

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 120). 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.

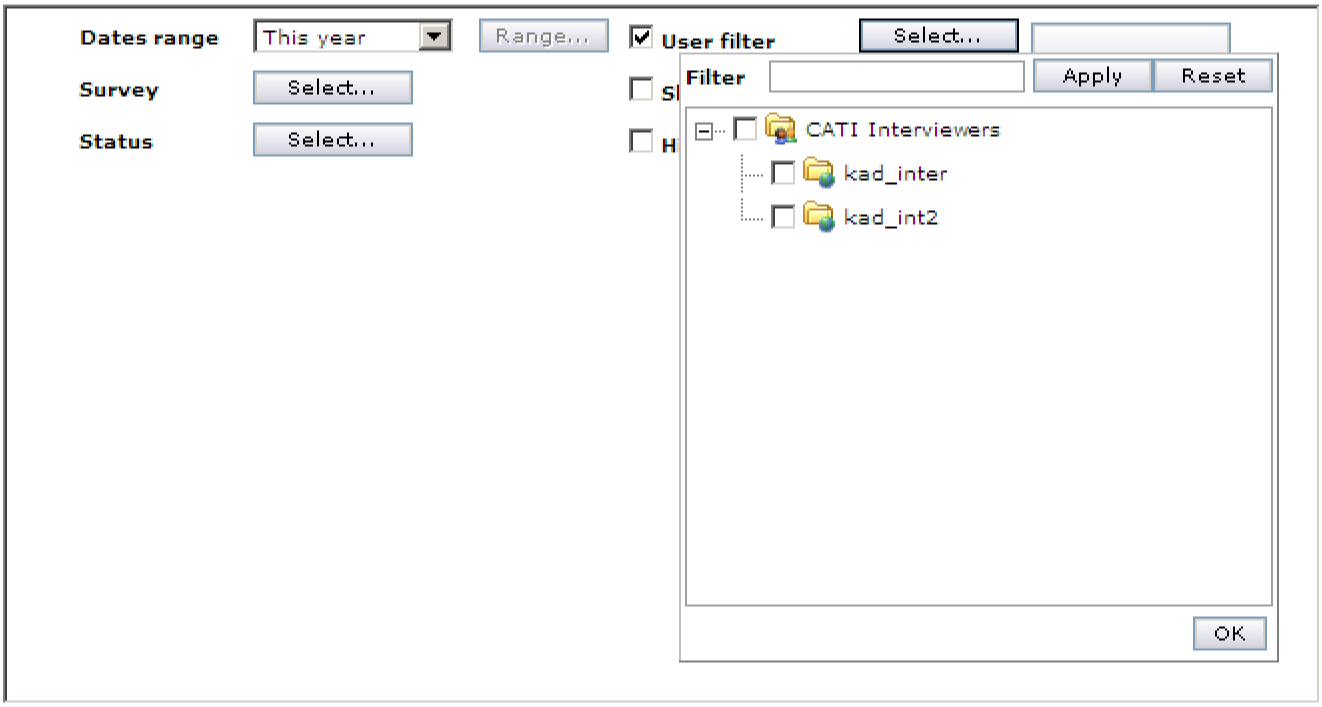
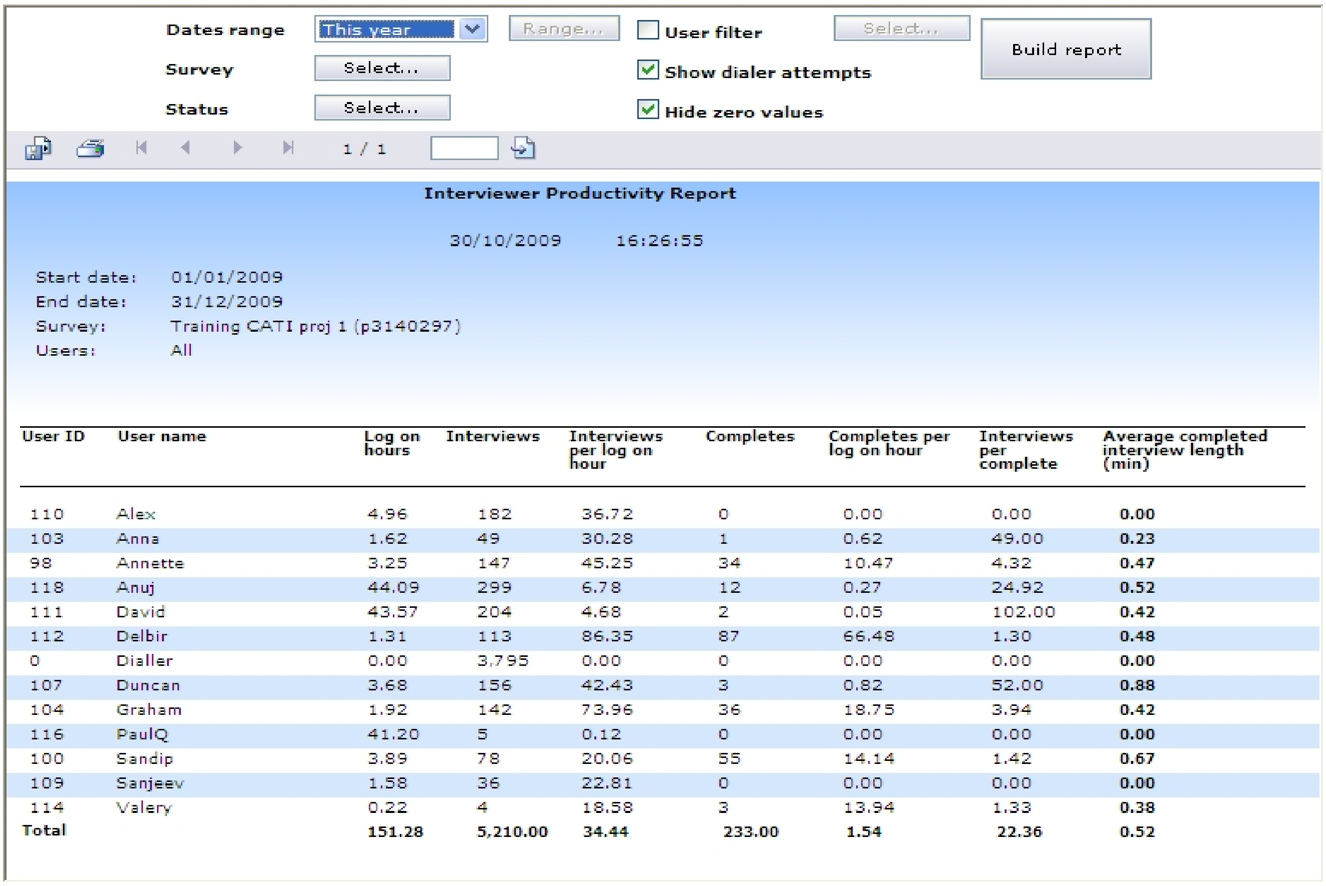



***Figure 185 Selecting interviewers to include into the Interviewer Productivity Report***

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. Press the Build Report button to generate the Interviewer Productivity Report.




| User ID | User name | Log on hours | Interviews | Interviews per log on hour | Completes | Completes per log on hour | Interviews per complete | Average completed interview length (min) |
|---|---|---|---|---|---|---|---|---|
| 110 | Alex | 4.96 | 182 | 36.72 | 0 | 0.00 | 0.00 | 0.00 |
| 103 | Anna | 1.62 | 49 | 30.28 | 1 | 0.62 | 49.00 | 0.23 |
| 98 | Annette | 3.25 | 147 | 45.25 | 34 | 10.47 | 4.32 | 0.47 |
| 118 | Anuj | 44.09 | 299 | 6.78 | 12 | 0.27 | 24.92 | 0.52 |
| 111 | David | 43.57 | 204 | 4.68 | 2 | 0.05 | 102.00 | 0.42 |
| 112 | Delbir | 1.31 | 113 | 86.35 | 87 | 66.48 | 1.30 | 0.48 |
| 0 | Dialler | 0.00 | 3,795 | 0.00 | 0 | 0.00 | 0.00 | 0.00 |
| 107 | Duncan | 3.68 | 156 | 42.43 | 3 | 0.82 | 52.00 | 0.88 |
| 104 | Graham | 1.92 | 142 | 73.96 | 36 | 18.75 | 3.94 | 0.42 |
| 116 | PaulQ | 41.20 | 5 | 0.12 | 0 | 0.00 | 0.00 | 0.00 |
| 100 | Sandip | 3.89 | 78 | 20.06 | 55 | 14.14 | 1.42 | 0.67 |
| 109 | Sanjeev | 1.58 | 36 | 22.81 | 0 | 0.00 | 0.00 | 0.00 |
| 114 | Valery | 0.22 | 4 | 18.58 | 3 | 13.94 | 1.33 | 0.38 |
| **Total** | | **151.28** | **5,210.00** | **34.44** | **233.00** | **1.54** | **22.36** | **0.52** |

***Figure 186 The generated Interviewer Productivity Report***

11. 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 hour | This is the total time (in hours) spent logged into the system 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 |

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

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

    Press the First button to jump to the first report page, press the Previous button to jump one page back, press the Next button to jump one page forward, or press the Last button to jump to the last report page.

Numbers to the right of these buttons show the current page number and the total number of pages in the report.

You can also jump to the specified report page – enter the page number in the Go To field and press the Go To button to do this.

13. The generated report can be exported and printed out – refer to Exporting the generated report on page 172 and Printing out the generated report on page 173 for instructions.

## 8.5 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 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/Attempts by Disposition Report from the context menu that appears.

   This will display the Attempts by Disposition Report settings in the top right frame.

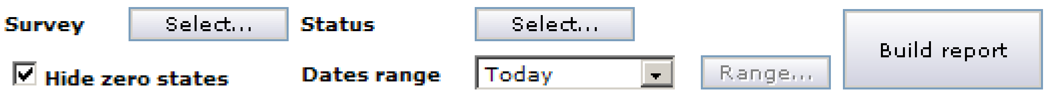



*Figure 187 Configuring the Attempts by disposition Report*

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 120). 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.

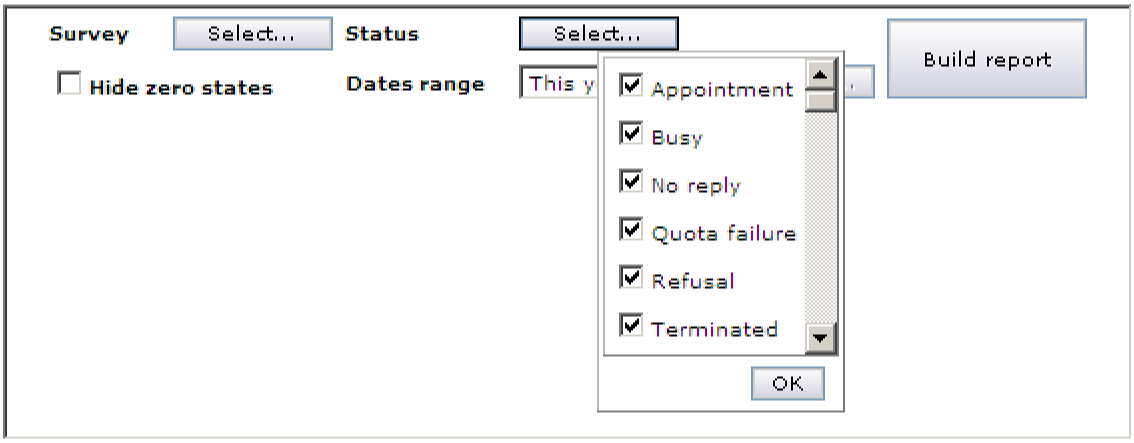



***Figure 188 Selecting extended statuses to include into the Attempts by disposition Report***

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.

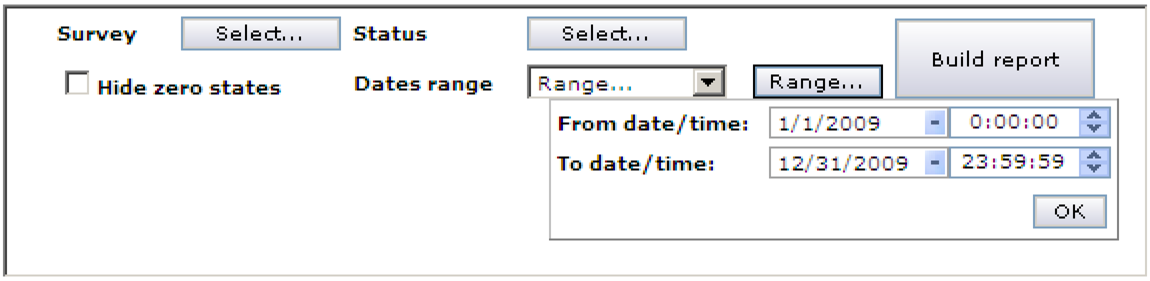



***Figure 189 Choosing the date range for the Attempts by disposition Report***

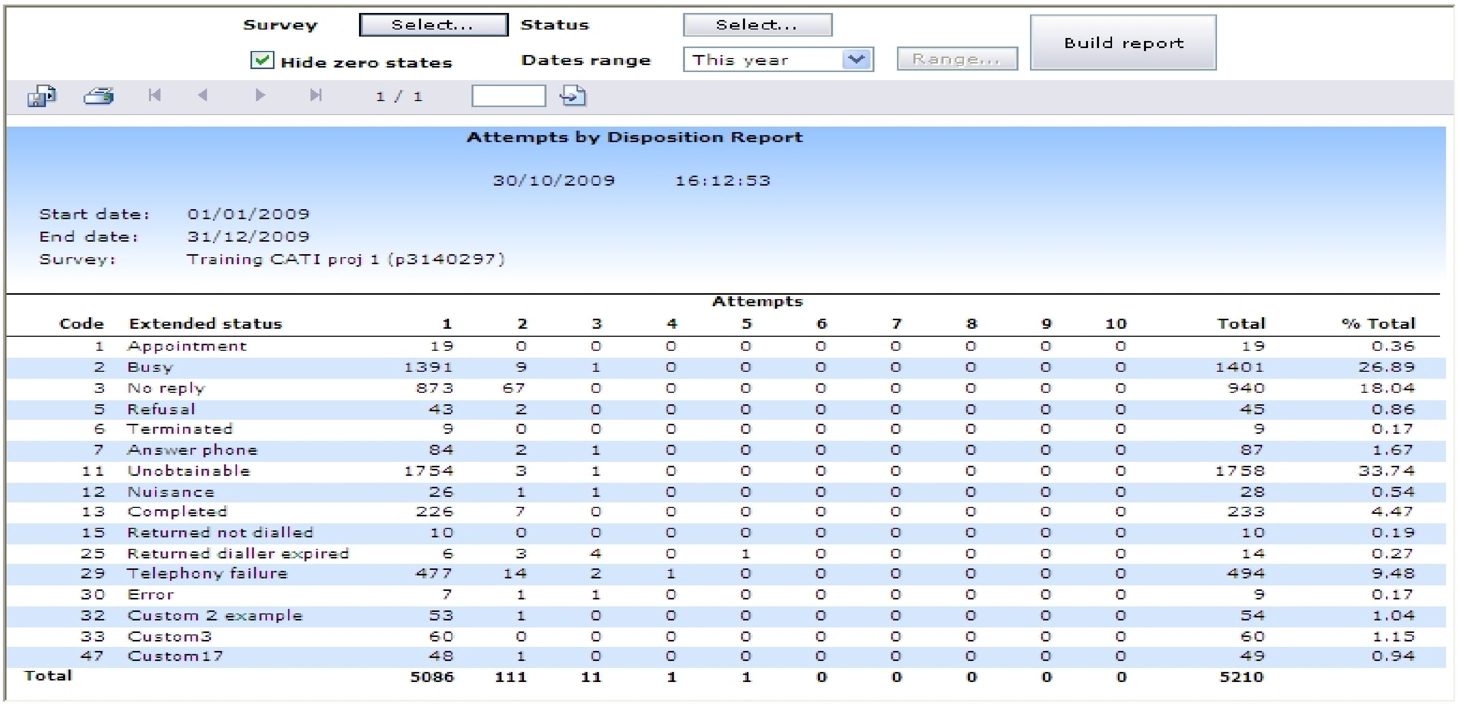
Specify the start and finish time of the desired period using the From and To fields. These fields include the calendar form which opens when you press the arrow button in the date field, and the time spinbox which allows increasing and decreasing value with the help of the buttons, or entering the value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

30/10/2009 16:12:53

Start date: 01/01/2009
End date: 31/12/2009
Survey: Training CATI proj 1 (p3140297)

| | | Attempts | | | | | | | | | | | |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Code | Extended status | 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | 10 | Total | % Total |
| 1 | Appointment | 19 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 19 | 0.36 |
| 2 | Busy | 1391 | 9 | 1 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 1401 | 26.89 |
| 3 | No reply | 873 | 67 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 940 | 18.04 |
| 5 | Refusal | 43 | 2 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 45 | 0.86 |
| 6 | Terminated | 9 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 9 | 0.17 |
| 7 | Answer phone | 84 | 2 | 1 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 87 | 1.67 |
| 11 | Unobtainable | 1754 | 3 | 1 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 1758 | 33.74 |
| 12 | Nuisance | 26 | 1 | 1 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 28 | 0.54 |
| 13 | Completed | 226 | 7 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 233 | 4.47 |
| 15 | Returned not dialled | 10 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 10 | 0.19 |
| 25 | Returned dialler expired | 6 | 3 | 4 | 0 | 1 | 0 | 0 | 0 | 0 | 0 | 14 | 0.27 |
| 29 | Telephony failure | 477 | 14 | 2 | 1 | 0 | 0 | 0 | 0 | 0 | 0 | 494 | 9.48 |
| 30 | Error | 7 | 1 | 1 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 9 | 0.17 |
| 32 | Custom 2 example | 53 | 1 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 54 | 1.04 |
| 33 | Custom3 | 60 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 60 | 1.15 |
| 47 | Custom17 | 48 | 1 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 49 | 0.94 |
| Total | | 5086 | 111 | 11 | 1 | 1 | 0 | 0 | 0 | 0 | 0 | 5210 | |

***Figure 190 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 First button to jump to the first report page, press the Previous button to jump one page back, press the Next button to jump one page forward, or press the Last button to jump to the last report page.

   Numbers to the right of these buttons show the current page number and the total number of pages in the report.

   You can also jump to the specified report page – enter the page number in the Go To field and press the Go To button to do this.

8. The generated report can be exported and printed out – refer to Exporting the generated report on page 172 and Printing out the generated report on page 173 for instructions.

## 8.6 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 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/Number of Attempts Report from the context menu that appears.

   This will display the Number of Attempts Report settings in the top right frame.

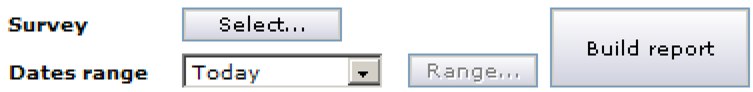



***Figure 191 Configuring the Number of attempts Report***

   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 120). 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.

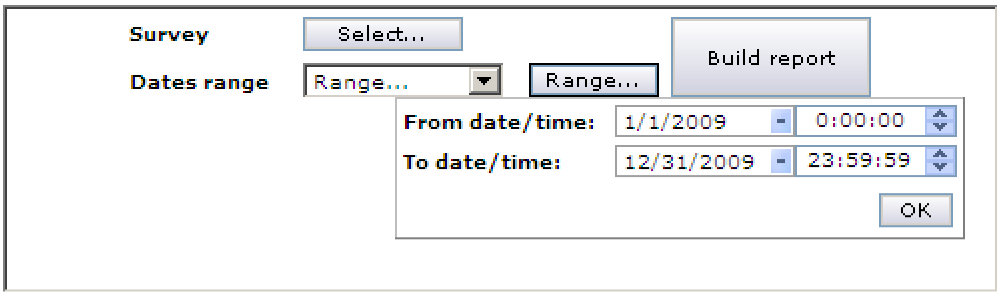



***Figure 192 Choosing the date range for the Number of Attempts Report***

   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.

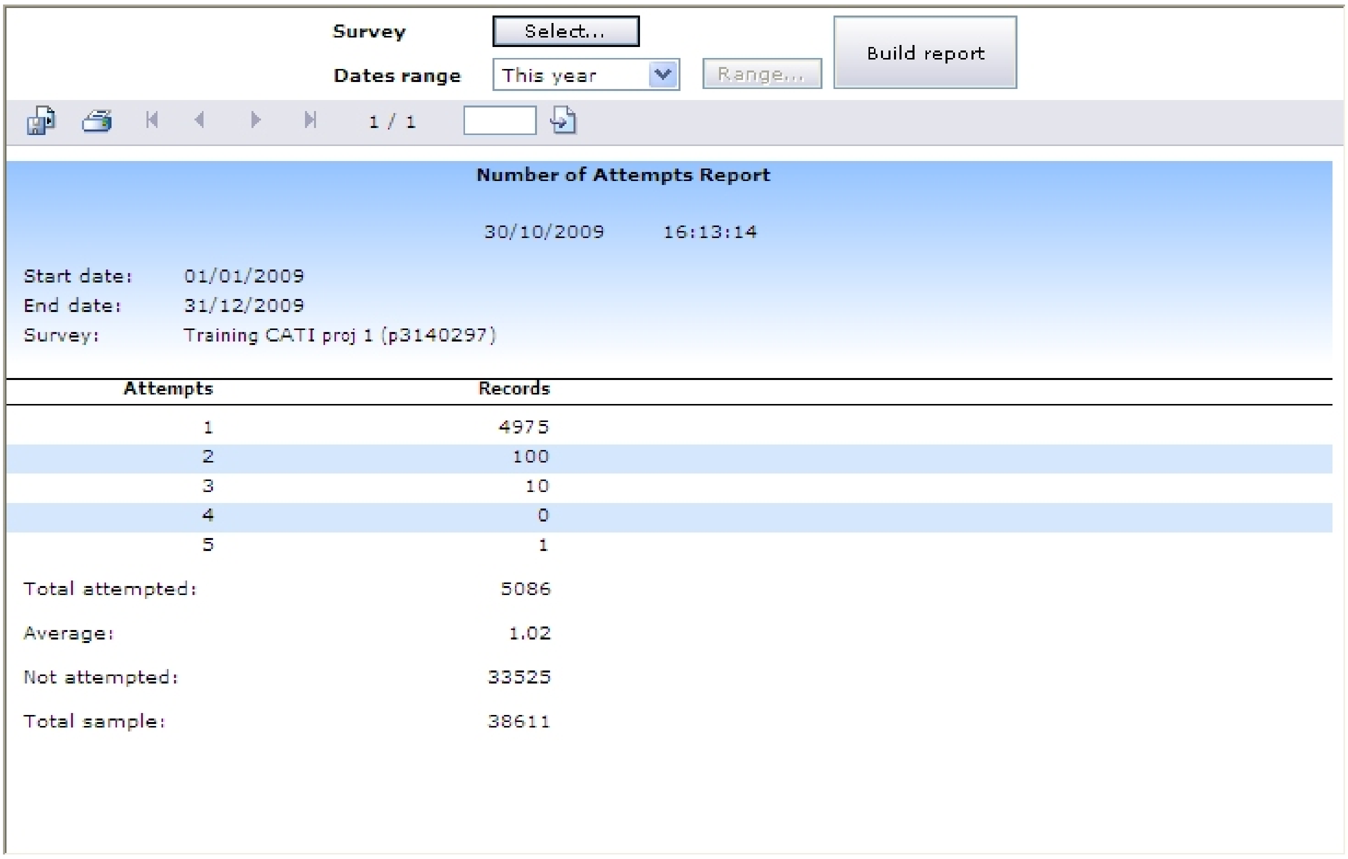



***Figure 193 The generated Number of Attempts Report***

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 First button to jump to the first report page, press the Previous button to jump one page back, press the Next button to jump one page forward, or press the Last button to jump to the last report page.

   Numbers to the right of these buttons show the current page number and the total number of pages in the report.

   You can also jump to the specified report page – enter the page number in the Go To field and press the Go To button to do this.

7. The generated report can be exported and printed out – refer to Exporting the generated report on page 172 and Printing out the generated report on page 173 for instructions.

## 8.7 Generating the Call Attempts log

The Call Attempts log lists and details all calls that were made for a selected survey, or for all surveys.

The Call Attempts log contains the following data displayed in columns:

- Date - the date and time the call was made (displayed for the local time zone);
- Project ID - ID of the survey for which the call was made;
- Project 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 number - 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 log is generated and displayed, supervisor can filter the log contents by any column shown in this log.

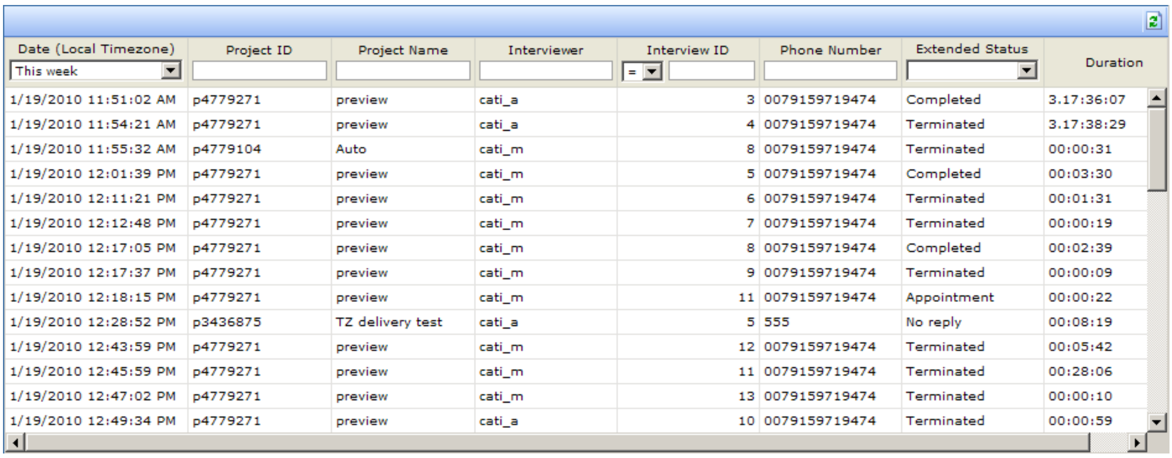
The Call attempts log can be generated from the Reports tab for all surveys, or from the All Surveys list for a certain survey.

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 log 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 log in the top right frame of the CATI Supervisor window.



| Date (Local Timezone) | Project ID | Project Name | Interviewer | Interview ID | Phone Number | Extended Status | Duration |
|---|---|---|---|---|---|---|---|
| This week | | | | = | | | |
| 1/19/2010 11:51:02 AM | p4779271 | preview | cati_a | 3 | 0079159719474 | Completed | 3.17:36:07 |
| 1/19/2010 11:54:21 AM | p4779271 | preview | cati_a | 4 | 0079159719474 | Terminated | 3.17:38:29 |
| 1/19/2010 11:55:32 AM | p4779104 | Auto | cati_m | 8 | 0079159719474 | Terminated | 00:00:31 |
| 1/19/2010 12:01:39 PM | p4779271 | preview | cati_m | 5 | 0079159719474 | Completed | 00:03:30 |
| 1/19/2010 12:11:21 PM | p4779271 | preview | cati_m | 6 | 0079159719474 | Terminated | 00:01:31 |
| 1/19/2010 12:12:48 PM | p4779271 | preview | cati_m | 7 | 0079159719474 | Terminated | 00:00:19 |
| 1/19/2010 12:17:05 PM | p4779271 | preview | cati_m | 8 | 0079159719474 | Completed | 00:02:39 |
| 1/19/2010 12:17:37 PM | p4779271 | preview | cati_m | 9 | 0079159719474 | Terminated | 00:00:09 |
| 1/19/2010 12:18:15 PM | p4779271 | preview | cati_m | 11 | 0079159719474 | Appointment | 00:00:22 |
| 1/19/2010 12:28:52 PM | p3436875 | TZ delivery test | cati_a | 5 | 555 | No reply | 00:08:19 |
| 1/19/2010 12:43:59 PM | p4779271 | preview | cati_m | 12 | 0079159719474 | Terminated | 00:05:42 |
| 1/19/2010 12:45:59 PM | p4779271 | preview | cati_m | 11 | 0079159719474 | Terminated | 00:28:06 |
| 1/19/2010 12:47:02 PM | p4779271 | preview | cati_m | 13 | 0079159719474 | Terminated | 00:00:10 |
| 1/19/2010 12:49:34 PM | p4779271 | preview | cati_a | 10 | 0079159719474 | Terminated | 00:00:59 |

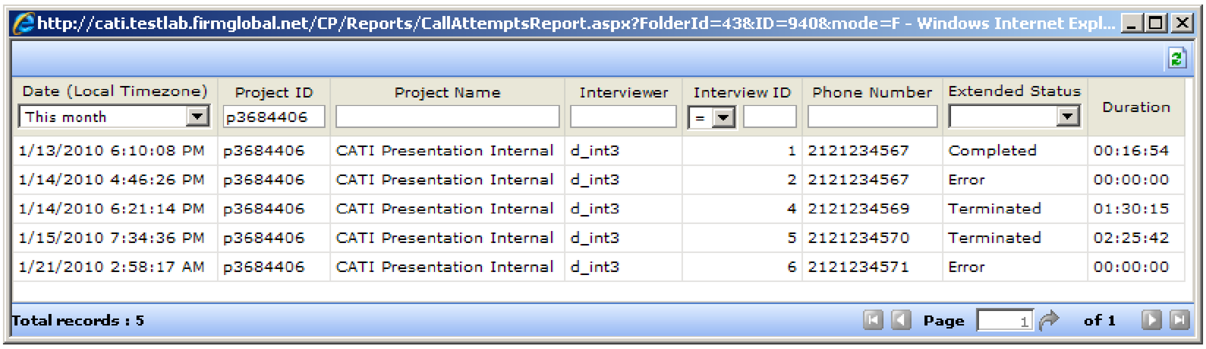
***Figure 194 Call Attempts log displayed in the top right frame of the CATI Supervisor window***

3. You may want to update the log - press the Refresh button in the top right corner of the frame to do it.
4. You can filter records displayed in the log - use the header row controls to do this. If you apply a filter (or a number of filters) you have to press the Refresh button to update the log.

#### To generate the Call Attempts log 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 log for and right-click this survey. Choose Reports/Call Attempts Log from the context menu that appears.

   This will display the Call Attempts log in a separate window.


http://cati.testlab.firmglobal.net/CP/Reports/CallAttemptsReport.aspx?FolderId=43&ID=940&mode=F - Windows Internet Expl...

| Date (Local Timezone) | Project ID | Project Name | Interviewer | Interview ID | Phone Number | Extended Status | Duration |
|---|---|---|---|---|---|---|---|
| This month | p3684406 | | | = | | | |
| 1/13/2010 6:10:08 PM | p3684406 | CATI Presentation Internal | d_int3 | 1 | 2121234567 | Completed | 00:16:54 |
| 1/14/2010 4:46:26 PM | p3684406 | CATI Presentation Internal | d_int3 | 2 | 2121234567 | Error | 00:00:00 |
| 1/14/2010 6:21:14 PM | p3684406 | CATI Presentation Internal | d_int3 | 4 | 2121234569 | Terminated | 01:30:15 |
| 1/15/2010 7:34:36 PM | p3684406 | CATI Presentation Internal | d_int3 | 5 | 2121234570 | Terminated | 02:25:42 |
| 1/21/2010 2:58:17 AM | p3684406 | CATI Presentation Internal | d_int3 | 6 | 2121234571 | Error | 00:00:00 |

Total records : 5 Page 1 of 1

*Figure 195 Call Attempts log displayed in the separate window when generated from the All Surveys list*

3. You may want to update the log - press the Refresh button in the top right corner of the frame to do it.
4. You can filter records displayed in the log - use the header row controls to do this. If you apply a filter (or a number of filters) you have to press the Refresh button to update the log.

## 8.8 Exporting the generated report

The generated report can be exported and saved as a file 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.

**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 the report dialog window.

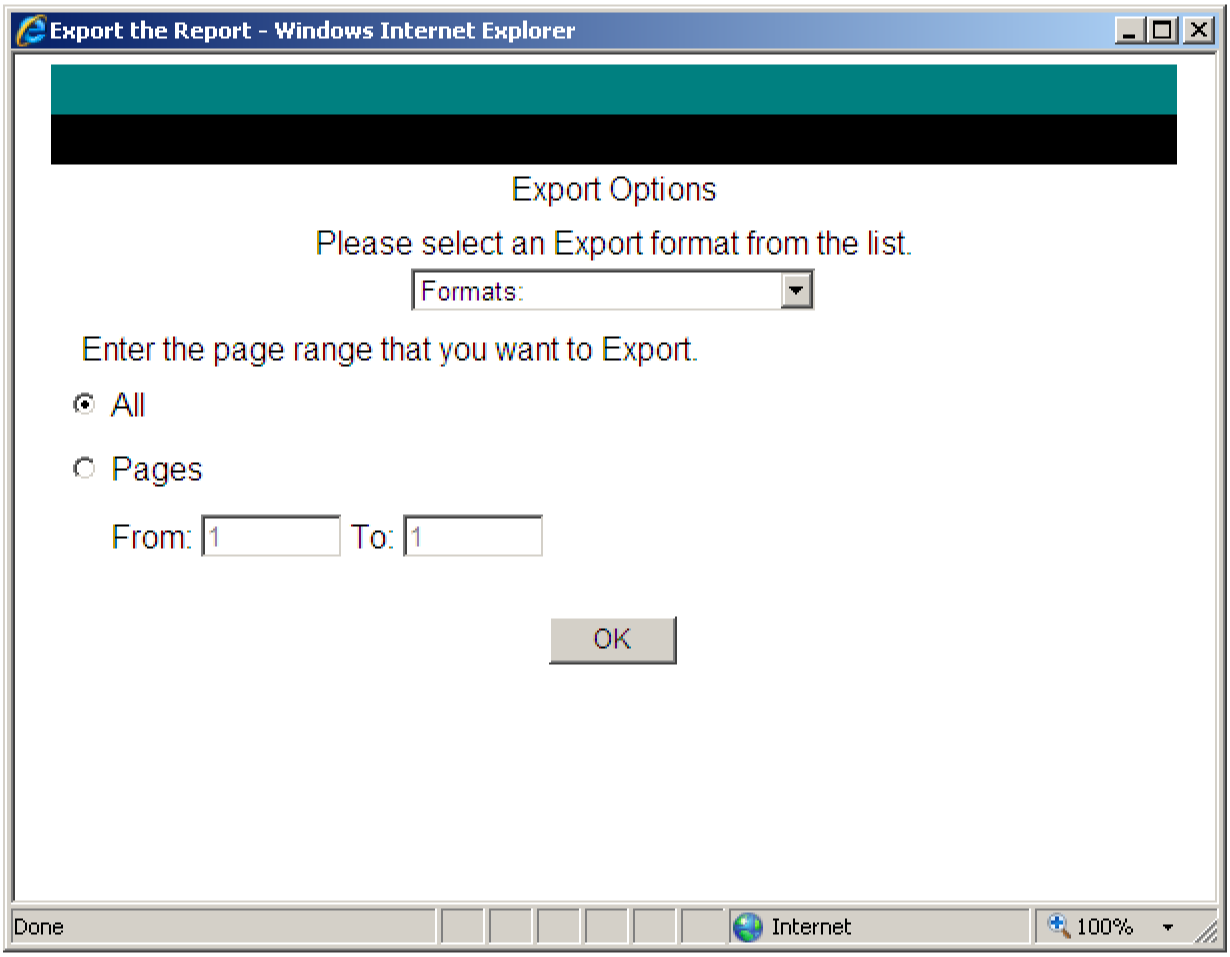



***Figure 196 Export the Report dialog window***

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

2. From the Formats 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)
   - Acrobat format (file with PDF extension)
   - MS Word
   - MS Excel 97-2000
   - MS Excel 97-2000 (data only)

3. Choose whether you want to export the whole report (by selecting the All option), or selected pages (by entering the page range to be included in the exported report)

4. Press OK to start the export procedure. This will display the standard MS Internet Explorer dialog box using which yiou 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.

## 8.9 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 Acrobat format, and can be opened for printing only in case an application capable of reading files in the Acrobat format is installed on your machine.

**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 Print the Report dialog window.

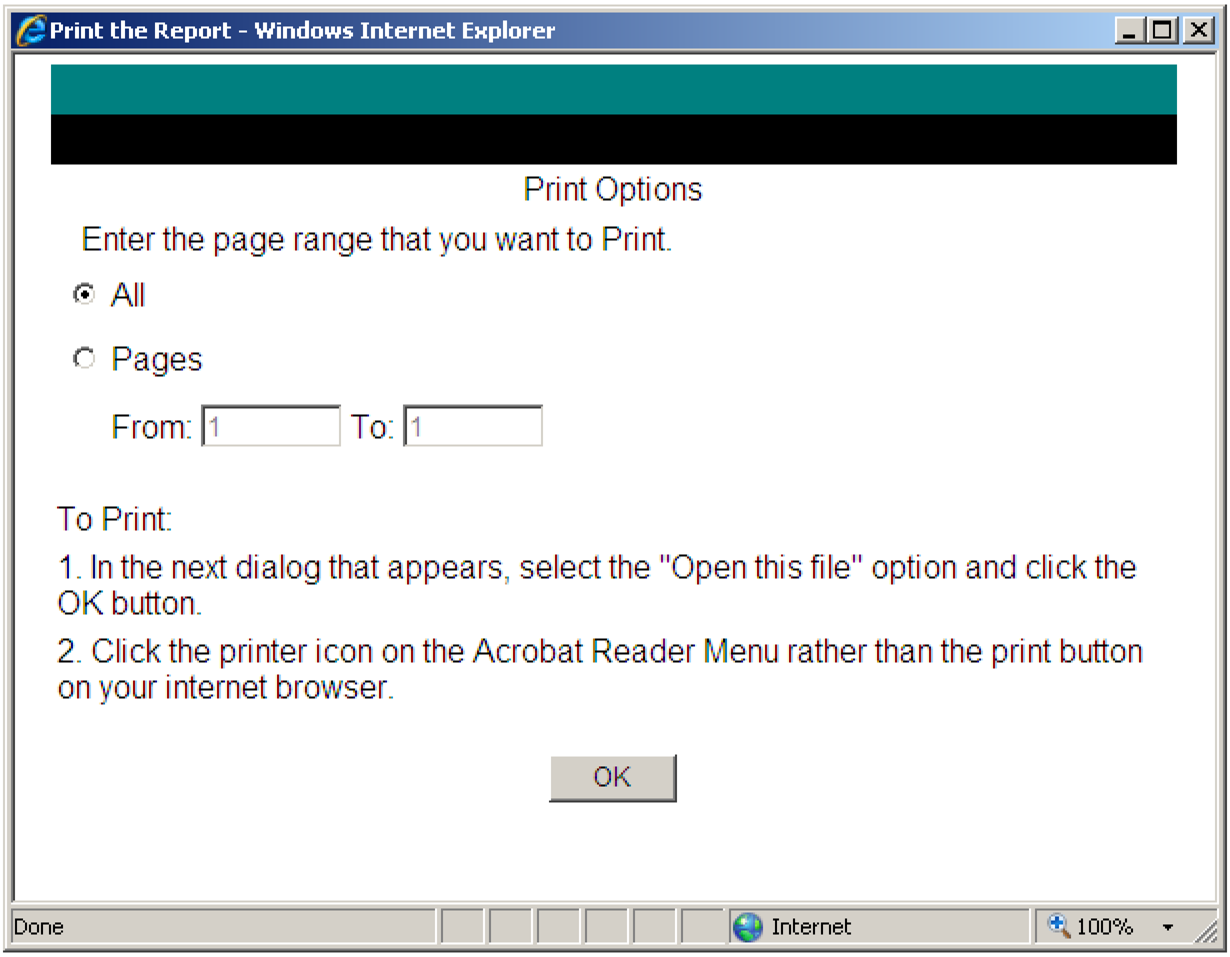



*Figure 197 Print the report dialog window*

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

2. Choose whether you want to print out the whole report (by selecting the All option), or only selected pages (by entering the page range to be printed).
3. Press OK. This will display the standard MS Internet Explorer dialog box using which yiou can select whether the file should be saved or opened. Select the Open this file option and press OK. This will open the file in the application capable of reading files in Acrobat format.
4. Print out this file using the standard application Print procedure.

# 9 Appendix A

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 Resource | number, Person ID or Group ID, -1, -2 | Enter Interviewer ID or Group ID, -1 for " Unchanged ", -2 for " Last Person " | Assigns a specified person/group to a specified interview. | 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.<br>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 date-time, dd/mm/yyyy hh:mm | Time format: **dd/mm/yyyy hh:mm** | Sets the expiration time of a call.<br>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. | |

# 10 Appendix B

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.

# 11 Appendix C

Below is the list of hot key combinations used to perform actions in CATI Interviewer Console.

| Action | Hot key combinations | Comment |
|---|---|---|
| One page back | Ctrl+Backspace, or Left cursor key, or PgUp | |
| One page forward | Right cursor key, or PgDn | |
| Make an appointment | Ctrl+A | |
| Fast forward | Ctrl+Enter | |
| Log out after the current interview is finished | Ctrl+Q | |
| Terminate an interview | Ctrl+X | |
| Choose the default answer | Ctrl+D | |
| Choose the refused answer | Ctrl+R | |
| 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 to the keyboard entry text box (and select this box) | F2 | Used with the Open/Multi question types |
| Move focus back from 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.

| ID | Name | Bias |
|---|---|---|
| 1 | (GMT) Greenwich Mean Time : Dublin, Edinburgh, Lisbon, London | 0 |
| 2 | (GMT) Casablanca, Monrovia | 0 |
| 3 | (GMT+01:00) Amsterdam, Berlin, Bern, Rome, Stockholm, Vienna | -1 |
| 4 | (GMT+01:00) Belgrade, Bratislava, Budapest, Ljubljana, Prague | -1 |
| 5 | (GMT+01:00) Brussels, Copenhagen, Madrid, Paris | -1 |
| 6 | (GMT+01:00) Sarajevo, Skopje, Warsaw, Zagreb | -1 |
| 7 | (GMT+01:00) West Central Africa | -1 |
| 8 | (GMT+02:00) Athens, Beirut, Istanbul, Minsk | -2 |
| 9 | (GMT+02:00) Bucharest | -2 |
| 10 | (GMT+02:00) Cairo | -2 |
| 11 | (GMT+02:00) Harare, Pretoria | -2 |
| 12 | (GMT+02:00) Helsinki, Kyiv, Riga, Sofia, Tallinn, Vilnius | -2 |
| 13 | (GMT+02:00) Jerusalem | -2 |
| 14 | (GMT+03:00) Baghdad | -3 |
| 15 | (GMT+03:00) Kuwait, Riyadh | -3 |
| 16 | (GMT+03:00) Moscow, St. Petersburg, Volgograd | -3 |
| 17 | (GMT+03:00) Nairobi | -3 |
| 18 | (GMT+03:30) Tehran | -3.5 |
| 19 | (GMT+04:00) Abu Dhabi, Muscat | -4 |
| 20 | (GMT+04:00) Baku, Tbilisi, Yerevan | -4 |
| 21 | (GMT+04:30) Kabul | -4.5 |
| 22 | (GMT+05:00) Ekaterinburg | -5 |
| 23 | (GMT+05:00) Islamabad, Karachi, Tashkent | -5 |
| 24 | (GMT+05:30) Chennai, Kolkata, Mumbai, New Delhi | -5.5 |
| 25 | (GMT+05:45) Kathmandu | -5.75 |
| 26 | (GMT+06:00) Almaty, Novosibirsk | -6 |
| 27 | (GMT+06:00) Astana, Dhaka | -6 |
| 28 | (GMT+06:00) Sri Jayawardenepura | -6 |
| 29 | (GMT+06:30) Rangoon | -6.5 |
| 30 | (GMT+07:00) Bangkok, Hanoi, Jakarta | -7 |
| 31 | (GMT+07:00) Krasnoyarsk | -7 |
| 32 | (GMT+08:00) Beijing, Chongqing, Hong Kong, Urumqi | -8 |
| 33 | (GMT+08:00) Irkutsk, Ulaan Bataar | -8 |
| 34 | (GMT+08:00) Kuala Lumpur, Singapore | -8 |
| 35 | (GMT+08:00) Perth | -8 |
| 36 | (GMT+08:00) Taipei | -8 |
| 37 | (GMT+09:00) Osaka, Sapporo, Tokyo | -9 |
| 38 | (GMT+09:00) Seoul | -9 |
| 39 | (GMT+09:00) Yakutsk | -9 |
| 40 | (GMT+09:30) Adelaide | -9.5 |
| 41 | (GMT+09:30) Darwin | -9.5 |
| 42 | (GMT+10:00) Brisbane | -10 |

| | | |
|---|---|---|
| 43 | (GMT+10:00) Canberra, Melbourne, Sydney | -10 |
| 44 | (GMT+10:00) Guam, Port Moresby | -10 |
| 45 | (GMT+10:00) Hobart | -10 |
| 46 | (GMT+10:00) Vladivostok | -10 |
| 47 | (GMT+11:00) Magadan, Solomon Is., New Caledonia | -11 |
| 48 | (GMT+12:00) Auckland, Wellington | -12 |
| 49 | (GMT+12:00) Fiji, Kamchatka, Marshall Is. | -12 |
| 50 | (GMT+13:00) Nuku'alofa | -13 |
| 51 | (GMT-01:00) Azores | 1 |
| 52 | (GMT-01:00) Cape Verde Is. | 1 |
| 53 | (GMT-02:00) Mid-Atlantic | 2 |
| 54 | (GMT-03:00) Brasilia | 3 |
| 55 | (GMT-03:00) Buenos Aires, Georgetown | 3 |
| 56 | (GMT-03:00) Greenland | 3 |
| 57 | (GMT-03:30) Newfoundland | 3.5 |
| 58 | (GMT-04:00) Atlantic Time (Canada) | 4 |
| 59 | (GMT-04:00) Caracas, La Paz | 4 |
| 60 | (GMT-04:00) Santiago | 4 |
| 61 | (GMT-05:00) Bogota, Lima, Quito | 5 |
| 62 | (GMT-05:00) Eastern Time (US & Canada) | 5 |
| 63 | (GMT-05:00) Indiana (East) | 5 |
| 64 | (GMT-06:00) Central America | 6 |
| 65 | (GMT-06:00) Central Time (US & Canada) | 6 |
| 66 | (GMT-06:00) Guadalajara, Mexico City, Monterrey | 6 |
| 67 | (GMT-06:00) Saskatchewan | 6 |
| 68 | (GMT-07:00) Arizona | 7 |
| 69 | (GMT-07:00) Chihuahua, La Paz, Mazatlan | 7 |
| 70 | (GMT-07:00) Mountain Time (US & Canada) | 7 |
| 71 | (GMT-08:00) Pacific Time (US & Canada); Tijuana | 8 |
| 72 | (GMT-09:00) Alaska | 9 |
| 73 | (GMT-10:00) Hawaii | 10 |
| 74 | (GMT-11:00) Midway Island, Samoa | 11 |
| 75 | (GMT-12:00) International Date Line West | 12 |

# 14 Index