



CATI Shell | TCPA |  
Dialing Features |  
DNC | AAPOR

2015 Survox Summit

# New CATI shell



## Why is this important to you?

- New users
- Existing users willing to change
- Will work with 8.6.1

## Agenda

- Data Layout
- Meta Commands
- Control Switches
- Repetitive Code
- Interviewer Verification Screen
- Targeted Dialing Methods
- Initial Contact Screen(s)
- DNC Management
- Standard Survent Blocks

# New CATI shell



## Presenters

### Jim Ratto, Customer Success

Started working for CFMC/Survox in 1981 and moved to the Support department in 1984. While in support he has not only been heavily involved with assisting clients solve their day to day issues, but has also done documentation, testing, and software design. He has always enjoyed the challenge of trying to solve clients most difficult problems.

### Jerry Pavia, Customer Success

Started working with CFMC/Survox software in 1986. He has worn many hats in his career, including IT Manager and Phone Room Manager. He joined CFMC/Survox in 2007 with the Service Bureau and has been involved in many of the more challenging studies

## Next steps

- Actively seeking a user or two to test and provide feedback





# Improved Shell

- Easier to understand/customize/add new options
- Takes advantage of new features
- Reorganized/Standardized the data layout
- Support all dialing modes
- Showcase coding techniques
- Future considerations



# Summary of Improvements



- Long Keyword for sub-types
- TR size = 100,000
- Synchronized TR and Fone file layout
- Collect “all” system information
- Created standard blocks
- All blocks are timed
- Supports “keypad” dialing



The background of the slide is a light blue color with a network diagram pattern. The diagram consists of numerous nodes (represented by circles and squares) connected by thin, dark blue lines, creating a complex web of connections. The nodes are distributed across the entire slide, with some clusters and some isolated nodes.

# Data Layout

# Data Layout



Survox  
Owned

Custom Phone  
Text

Survox Phone  
Text

Phone System

Survox Owned

1-50

51-4000

4001-4950

5000-5500

5501-8000

Scratch Shell  
Area

Scratch Data  
Area

Study Area

Text Area

Work  
Area

8001-9000

9001-10000

10001-20000

20001-32000

32001-100000



The background of the slide features a network diagram with various nodes and connecting lines. The top and bottom sections are light blue, while the middle section is black. The network diagram consists of nodes of different shapes (circles and squares) and sizes, connected by thin lines. Some nodes are larger and have more connections, while others are smaller and have fewer connections. The overall structure is a complex, interconnected web.

# Meta Commands



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# Flow Control Switches

# Flow Control Switches

- Control survey flow
- Multiple settings
- Support multiple users/clients

Which path should I take?





# Flow Control Switches

Switch	Setting
@SkipQPrompt	Never/Intro
@MaskPhoneNum	No/Yes
@IntvTargMode	Click/Keypad/Keyboard/None
@AllowGetSpecific	Never/Always/Interviewer/SpecialType
@GetSpecificType	1 to 9
@ShowDupField	Location/Variable name in the phone text area to display when there are duplicates
@DoEditBlock	
@Write_Case_Id	End/Begin/Data
@Id_Location	Location/Variable name of where existing case ID is

# Flow Control Switches

Switch	Setting
@Do_Begin_Session	Yes/No
@TrackProgress	None/Super_Dashboard/Server_Log/Both
@Sv_Save_Terminate	
@Copy_Call_Back_Name	Yes/No
@Sample_Call_Name	Location/Variable name in the phone text area of where the name of the respondent is
@DncPath	Path of where the dncfile resides
@Dnc_File_Name	Dnc file name only

# Sample code for Switches

## STEP 1: SET >DEFINE AT TOP OF RUN

```
>Define @SkipQPrompt      INTRO
```

## STEP 2: CHECK FOR VALID SETTINGS

```
>if @SkipQPrompt = "INTRO" or @SkipQPrompt = "NEVER"  
>else  
>echo  
>echo *****  
>echo  
>echo ERROR: SkipQPrompt must be INTRO or NEVER  
>echo  
>echo *****  
>echo  
>quit  
>endif
```



# Sample code for Switches

## STEP 3: SET DEFINE TO WHAT WILL BE USED BASED ON THE SETTING

```
>If @SkipQPrompt = "INTRO"  
>define @abort abort_interview_no_cr  
>Else  
>define @abort abort  
>Endif
```

## STEP 4: USAGE

```
{ SV_dial_Abort1:  
!If [sv_dial_return_status#1-799,801-999]  
!SPECIAL, @Abort }
```





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# Repetitive Code

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Block Name	Function
@ShowPhoneNumber	Standard phone number display
@Reformat/@NoReformat	Control reformatted and DB file output
@New_Error_Message	Custom error messages
CD Blocks	Standard page layouts



# >Define for a string of text or a single line

---

Define text string once

```
>Define @ShowPhoneNumber \|SV_Phone_Show.3|- \|SV_Phone_Show+3.3|- \|SV_Phone_Show+6.4|
```

Usage – Anywhere on any text line

The Phone Number being dialed is: @ShowPhoneNumber

# Custom Error Message Block



- Define error messages once
- Use at both top of questionnaire and in resume block

```
{ SV_EM1512: !ERRORMSG 1512  
FR1512 Vous devez entrer un texte  
1512 You must enter some text }
```



# >Filetodb and >Define for multiple lines of code

Define wanted error messages once using >Filetodb

```
>Filetodb new_error_message #  
{ SV_EM1512: !ERRORMSG 1512  
FR1512 Vous devez entrer un texte  
1512 You must enter some text }  
>eof
```

Use >Define to point back to the name of information saved in the dbfile

```
>define @new_error_message &&new_error_message
```

USAGE – Can have this both at top of survey and in the resume block

```
@new_error_message
```

# Screen Control Blocks (Compiler\_Directives)

CD Block Name	Description
Clear	Resets all HTML
Default	Default screen format
Rating	Attribute ratings grid
Numtab	Constant sum grid

Additional CD Blocks  
coming...  
And you can add your own

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# Interviewer Verification Screen

# Interviewer Verification Screen Before Session Block

Study Code:	joshtest_test
Employee ID:	0001
Employee Name:	Interviewer Number 1
Special Types:	No Special Type Set
Interviewer Mode:	Normal
Station Number:	10410
Dialer Number:	No Dialer
Phone Extension:	0000
Current Language:	NO LANGUAGE SET

If the above information is correct, hit next and go on, otherwise choose quit and you will need to be restarted with the correct information.

Quit! Some part of the above information is WRONG!

Next

Terminate

Special



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# Targeted Dialing Methods

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Setting	Description
Click	Dials phone number on a single click
Keyboard	Interviewer re-enters phone number on their computer keyboard
Keypad	Interviewer re-enters phone number on their phone keypad
None	No interaction necessary



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# Initial Contact Screen

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Hello my name is ?????? Do you want to do the survey?

- Yes, Continue
- No Answer
- Busy
- Call Back
- Answering Machine
- Number Change
- Hung Up
- Refused (Hard)
- Refused (Soft)
- Language Barrier
- Disconnected/Non-Working
- Non-Residential
- Non-Business
- Fax/Modem/Data Line
- Put on DO NOT CALL LIST
- Wrong Number
- Blocked Call
- Put Record Back
- Full Status List/ Change Mode

Next

Previous

Terminate

Special

GoTo a specific question

# Initial Contact Screen - Managing the response list

## Reasons to call back

101 No Answer  
102 Busy  
104 Call Back  
106 Answering Machine  
107 Number Change  
108 Hung Up  
131 Refused (Soft)  
211 Put Record Back  
  
999 Full Status List/ Change Mode  
(-mentor)^^^ Yes, Continue

## Resolved

001 COMPLETE  
002 Refused (Hard)  
003 Language Barrier  
004 Terminate in Progress  
005 Disconnected/Non-Working  
006 Non-Residential  
007 Non-Business  
008 Fax/Modem/Data Line  
096 Put on DO NOT CALL LIST  
010 Wrong Number  
011 Blocked Call



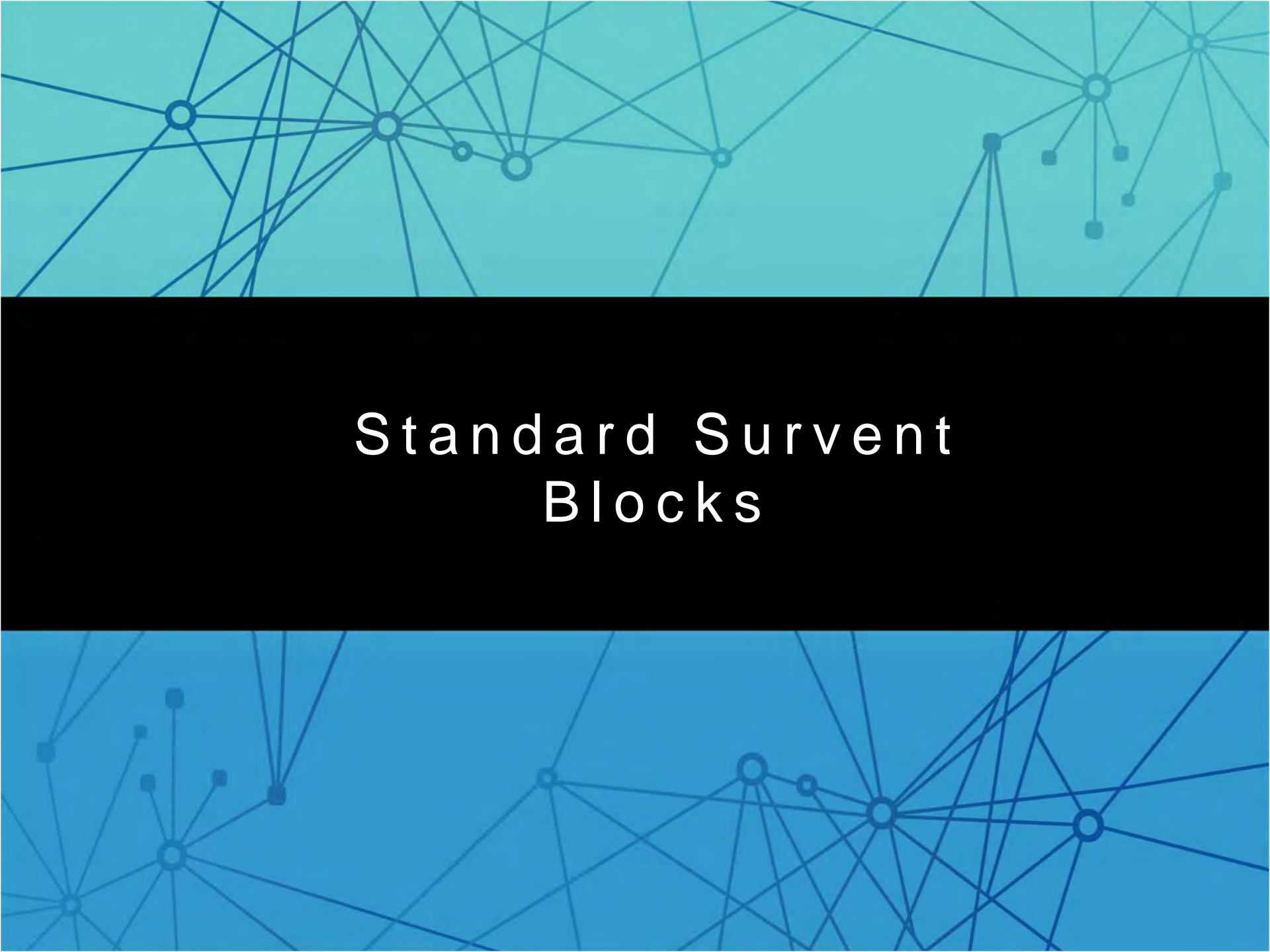
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# DNC Management

# DNC Management

- Automatically add numbers to your master DNC list
  - @DncPath
  - @Dnc\_File\_Name
- Regular DNC files
- Server DNC file

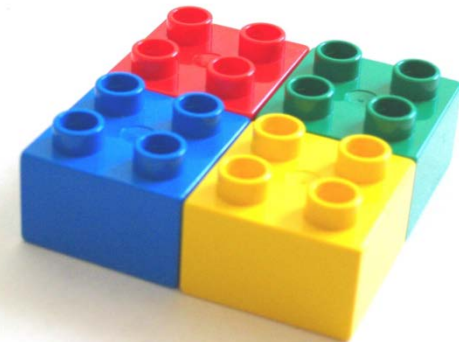


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# Standard Survent Blocks

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- Edit Open-Ends
- Quota Increment
- Terminate
  - Non-Qualified/Overquota
  - Terminate in Progress
- Special
  - Comment
  - Re-Dial
  - Change Language
- Suspend
- Resume







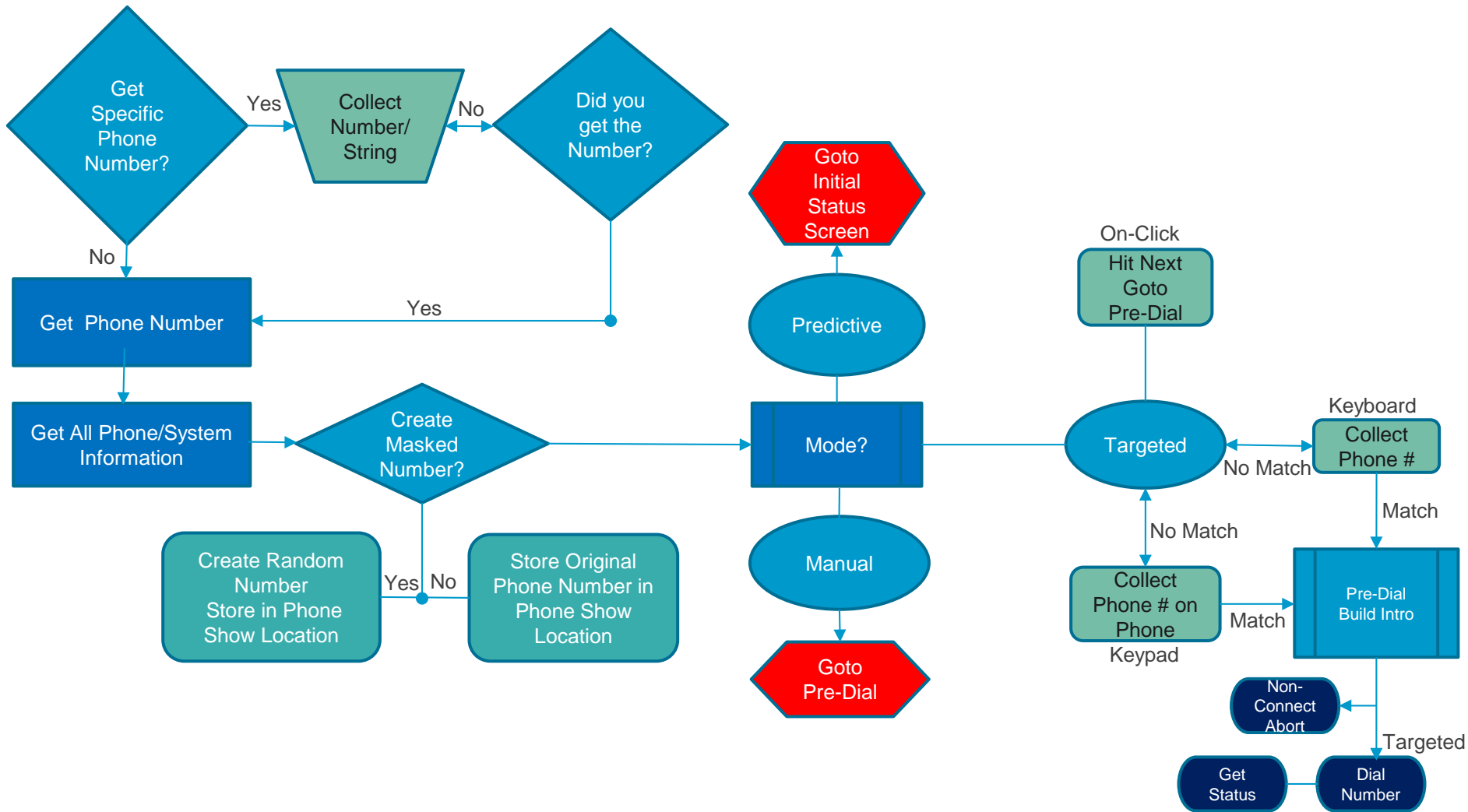
At the End ...



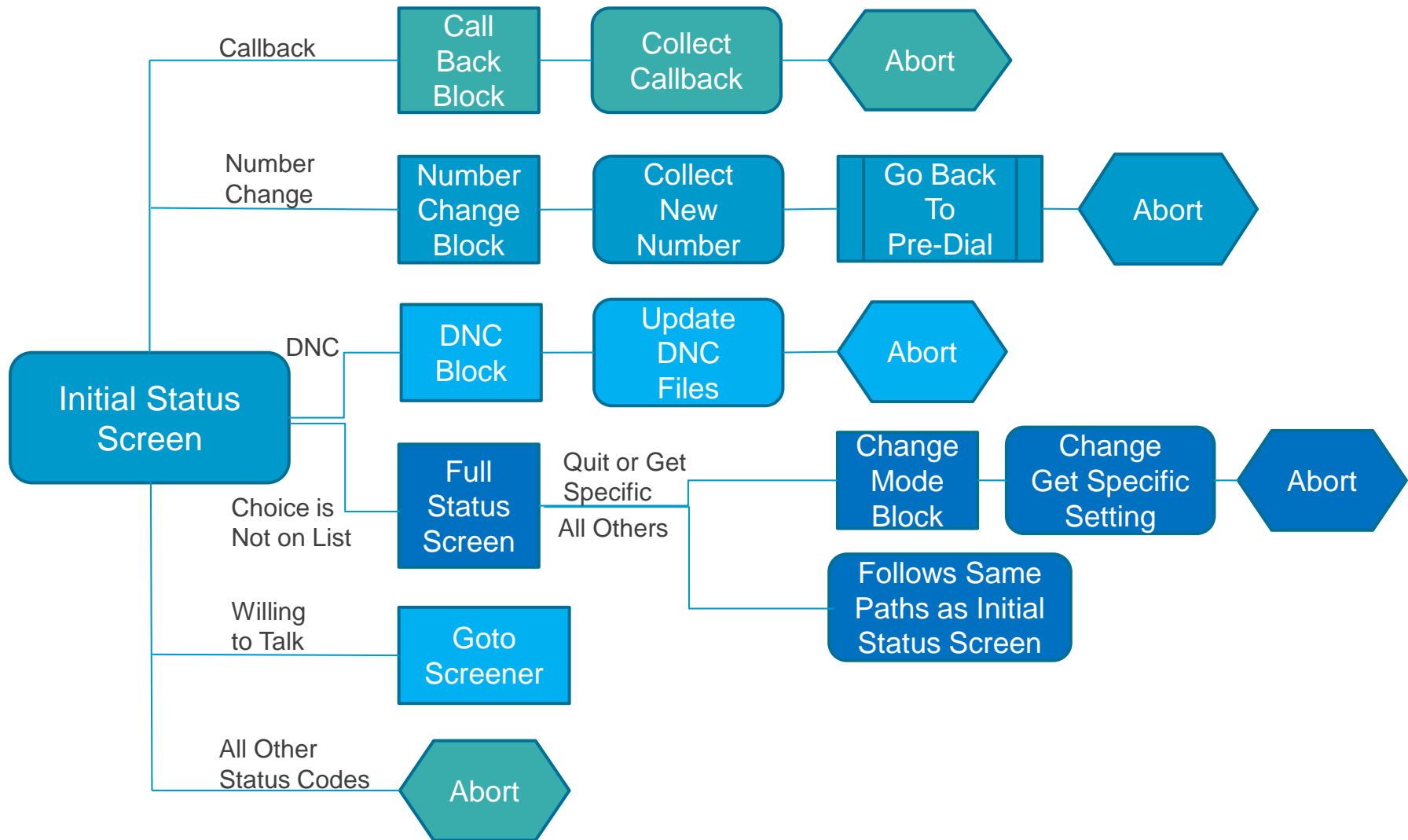
# At the End...



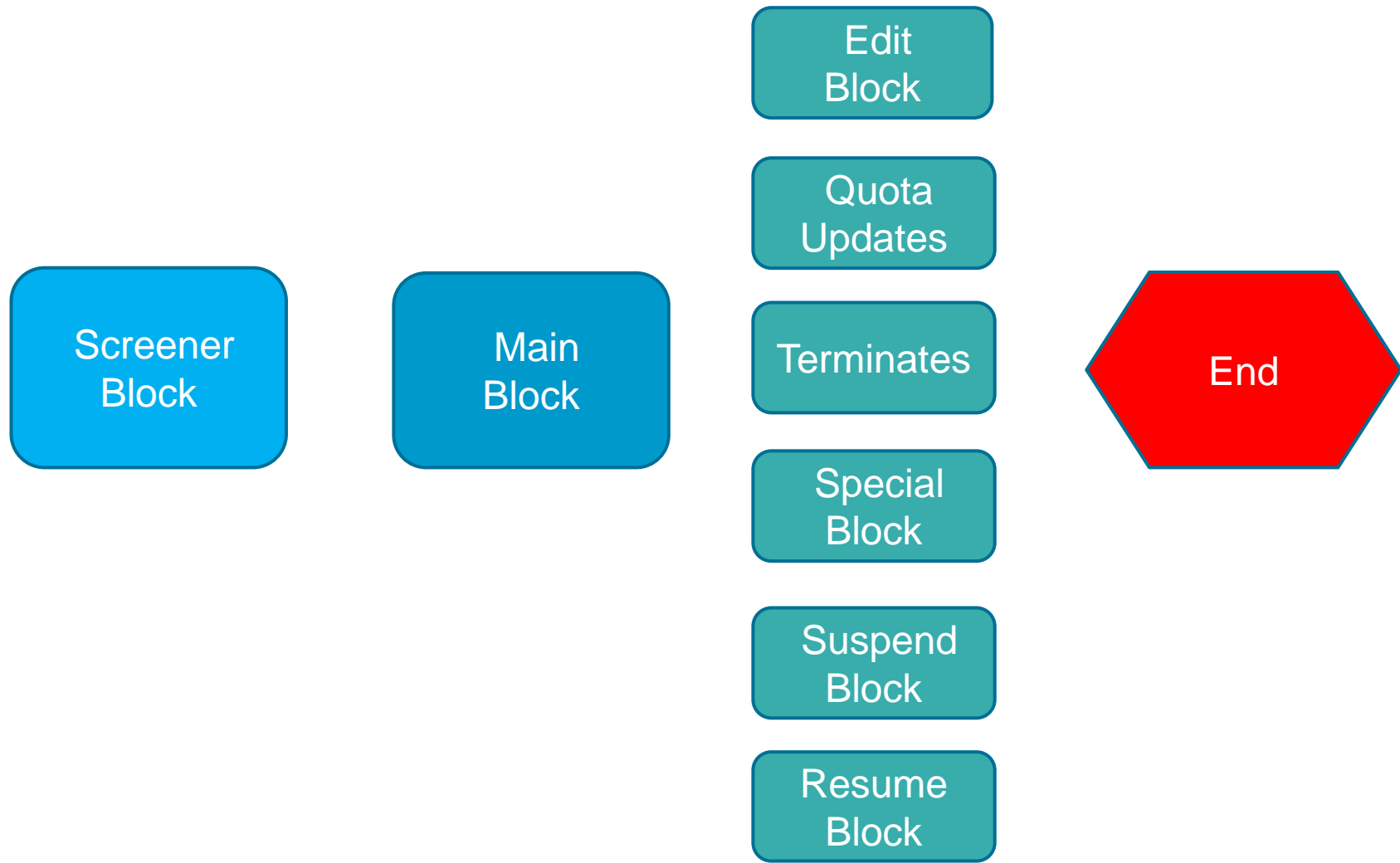
# Pre Status Screen Flow



# Status Screen Flow



# Regular Survey Flow (Includes Survox Blocks)



# Next Steps

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- We are actively looking for someone to do a “live” test. *Of course, any “tester” would get priority on any additional customizations that are wanted.*
- Learn more at [docs.Survoxinc.com](https://docs.survoxinc.com)
- Visit [Survox Services Center](#)
  - Request a demo
  - Request training
  - Request a quote for services





[WWW.SURVOXINC.COM](http://WWW.SURVOXINC.COM)