



TELESAGE™

*The Wise Choice in Survey Systems*



DIALQUEST™

USER GUIDE

VERSION 4.0

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DialQuest User Guide

Version 4.0

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TeleSage Inc.

Seattle, Washington

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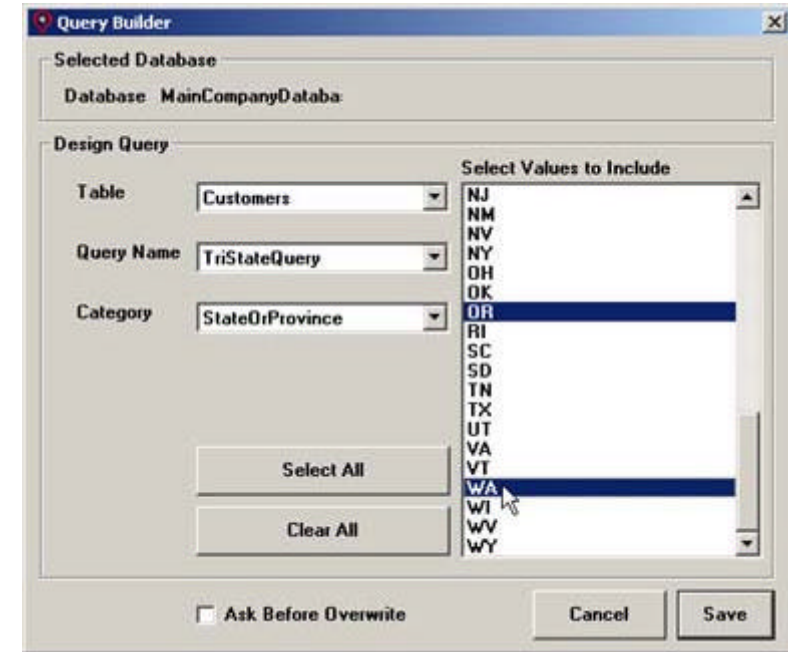
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 *Example:* You have a table named *Customers* that contains all your customers, but you only want to reach those within your tri-state area. Select Add/Modify Query from the Table or Query pull-down menu. When Query Builder opens, select *Customers* from the Table pull-down menu. Select Add New Query from the Query Name pull-down menu. When the dialog box appears, enter a name for your Query, such as *TriStateQuery*. Select the field that contains the customers' state from the Category pull-down menu. The list of values contained in the *StateOrProvince* field will appear in the box on the right. Hold down Ctrl and select the three states in the tri-state area. Click Save to return to the previous screen.



## Chapter 6

# Advanced Topic: Building a Query

### Overview

A **Query** is a database filter through which you can view, modify, and analyze data in different ways. You may want to create a query specifically for your Dialer job. The DialQuest Query Builder allows you to build Microsoft Access queries easily.

### Building A Query

1. Select **Add/Modify Query** from the Table or Query pull-down menu on the Dialer Jobs screen. This will open the Query Builder.
2. Select your **Table** from the pull-down menu.
3. Select **Add New Query** from the Query Name drop-down menu. A dialog box will appear. Enter a **Query Name**. When you are finished, click OK.
4. Select a **Category** from the drop-down menu. You will use this field to filter or sort your data.
5. From the list on the right, select the **Values** to include in your filter. DialQuest will call only the phone numbers that correspond to the values you select here. To select multiple values, hold down the Ctrl key. To select all the values, click the **Select All** button. To clear your selection(s), click the **Clear All** button.
6. Click **Save** to save the Query and return to the Dialer Jobs screen.

Note: When modifying an existing Query, checking Ask Before Overwrite will prevent you from saving changes until it is unchecked.



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# Preface

## This User Guide

This user guide will get you started on the basics of DialQuest. Later chapters will explore more advanced topics, as you need them.

## Help within DialQuest

If at any time you need assistance within DialQuest, go to the SmartQuest **Help** pull-down menu and select **Contents and Index**. You can quickly locate information using an index or browse through topics to find what you need.

### Getting Help in a Dialog

Like SmartQuest, DialQuest software includes **Tooltips**. A Tooltip is text that appears in a yellow box to give you more information about the program's features. They appear when you point to an item with the cursor of your mouse without clicking any buttons on the mouse (also called hovering).

To turn the Tooltip feature off or on again, simply uncheck or check **Show Tooltips** from the **Preferences** pull-down menu on the SmartQuest **Survey Design** or **Data** screens.

5. Click the **Import** button to import the data from the text file into your destination table and database. This will not append; it renames the existing database to a backup name and then creates a new database with only the records imported from the text file.

## Resetting Results

You may want to edit your Phone database to clear the Results Field for phone numbers that previously returned Busy or No Answer results so that DialQuest will call these phone numbers the next time you run the job. You can do this from the Dialer Jobs screen. To clear the results field of Busy results, click the **Reset Busy Numbers** button. To clear the results field of No Answer results, click the **Reset No-Answers** button. Both of these buttons are located in the Phone Number Database section.

## Exporting Data

### Table data

Using DialQuest, you can export data from the tables in your database to a text file. From the Dialer Jobs screen or the Set Job Quotas screen, click the **Import/Export** button. This will open the Database Import/Export dialog box.

1. Enter the name of your text file either by typing the path or browsing to it using the **Browse** button on the right.
2. Select the database that contains the data you want to export either by selecting it from the pull-down menu or browsing to it using the **Browse** button on the right.
3. Select the table that contains the data you want to export from the pull-down menu.
4. Select the number of backup cycles from the pull-down menu. This is the number of copies of the current database you want to create to have "just in case."
5. Click the **Export** button to export the data.

### Job results

You may want to export your job results to a tab-delimited text file. From the Dialer Job Results screen, click the **Export** button. This will open a text file named [Job ID]\_[unique two-digit number].txt that contains your job results.

## Advanced Topic: Data Management

### Overview

The Phone database that DialQuest uses to store phone numbers and the results of call attempts is independent from the Survey database that SmartQuest uses to store survey responses. To manage your Survey database, please see the **Data Management** chapter of the SmartQuest user guide.

When dialing, DialQuest looks in the Phone database at the Phone table you selected on the Dialer Jobs screen. The Phone table has a field that contains phone numbers and has an unpopulated field in which DialQuest records information about the dial attempt. DialQuest will dial each phone number that has a blank corresponding Results field. You can manipulate the contents of your Phone database by importing data or resetting some results. You can also export data if you need to transfer it to another location.

### Importing Data

Instead of entering a list of phone numbers by hand, you may want to import your phone numbers directly into your Phone database. Using DialQuest, you can import data from a text file to a table in your database. From the Dialer Jobs screen or the Set Job Quotas screen, click the **Import/Export** button. This will open the Database Import/Export dialog box.

1. Enter the name of your text file either by typing the path or browsing to it using the **Browse** button on the right.
2. Select the destination database either by selecting it from the pull-down menu or browsing to it using the **Browse** button on the right.
3. Select the destination table from the pull-down menu.
4. Select the number of backup cycles from the pull-down menu. This is the number of copies of the current database you want to create. You would set backup cycles to 0 if you didn't need to view the data again.



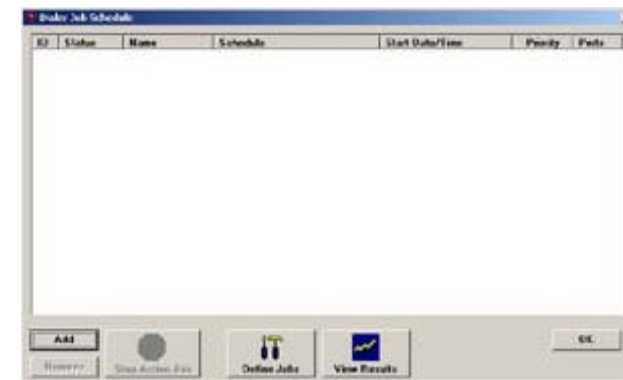
## Getting Started

### Installation

DialQuest will install with SmartQuest and has no additional system requirements. It is compatible with the Dialogic line of voice boards from Intel. For more information, please see the *Before You Begin Installation* and *Installation* sections of the **Getting Started** chapter of the SmartQuest user guide.

### Launching DialQuest

From the SmartQuest program, click the **Dialer** button on the left-hand menu. This will open DialQuest and take you to the Dialer Job Schedule screen.



### How DialQuest Works

#### Overview

1. You design a Dialer Job on your PC by selecting a set of phone numbers in a database and specifying dates, times, and quotas to call.
2. At the specified date and time, your PC begins calling your list of phone numbers.
3. SmartQuest, your automated survey system, will administer a survey you created or leave a message on an answering machine.

## Chapter 2

# Creating A Dialer Job

### Overview

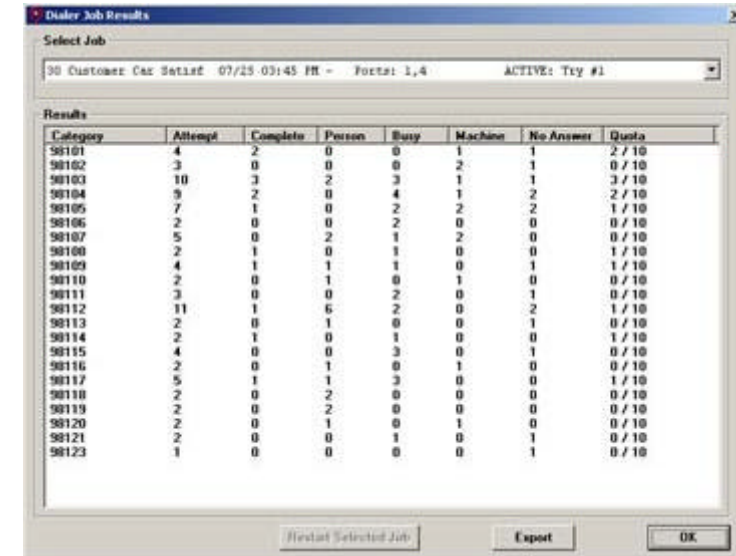
This chapter will show help you set up a Dialer Job in DialQuest. For each job, DialQuest dials a set of phone numbers. When a live person answers, the designated SmartQuest survey will begin. The survey logic will continue as you have set it up in SmartQuest. See the **Survey Design** chapters in the SmartQuest user guide for instructions on setting up your survey.

### The Five Basic Steps of Job Designing

Click on the **Define Jobs** button to see the Dialer Jobs screen. Here you will see the five basic steps of designing a job:

- 1. Select Job** Create, delete, or modify a Dialer Job.
- 2. Select Phone Number Database** Choose the database, table, and fields where your phone numbers and results are stored.
- 3. Set Dialing Specifications** Specify how to dial out, which survey to give, and what to do in case of a busy signal, no answer, or an answering machine.
- 4. Set Job Schedule** Choose the times and days of the week that your job will run.
- 5. Set Job Quotas** Specify whether DialQuest should dial all of the numbers in your database or only numbers that meet certain requirements.

At any time, you can click **OK** to save changes and return to the Dialer Job Schedule screen. Click **Cancel** to return to the Dialer Job Schedule screen without saving changes. Click **Apply** to save changes and continue working in the Dialer Jobs screen. Click **Refresh** to add any new databases, tables, fields, or surveys to the pull-down menus.



The screenshot shows a window titled "Dialer Job Results" with a "Select Job" dropdown menu set to "30 Customer Car Setlat 07/25 03:45 PM - Fortsi: 1,4" and "ACTIVE: Try #1". Below the menu is a "Results" table with the following columns: Category, Attempt, Complete, Person, Busy, Machine, No Answer, and Quota. The table contains 23 rows of data for categories 98101 through 98123.

Category	Attempt	Complete	Person	Busy	Machine	No Answer	Quota
98101	4	2	0	0	1	1	2 / 10
98102	3	0	0	0	2	1	0 / 10
98103	10	3	2	3	1	1	3 / 10
98104	9	2	0	4	1	2	2 / 10
98105	7	1	0	2	2	2	1 / 10
98106	2	0	0	2	0	0	0 / 10
98107	5	0	2	1	2	0	0 / 10
98108	2	1	0	1	0	0	1 / 10
98109	4	1	1	1	0	1	1 / 10
98110	2	0	1	0	1	0	0 / 10
98111	3	0	0	2	0	1	0 / 10
98112	11	1	6	2	0	2	1 / 10
98113	2	0	1	0	0	1	0 / 10
98114	2	1	0	1	0	0	1 / 10
98115	4	0	0	3	0	1	0 / 10
98116	2	0	1	0	1	0	0 / 10
98117	5	1	1	3	0	0	1 / 10
98118	2	0	2	0	0	0	0 / 10
98119	2	0	2	0	0	0	0 / 10
98120	2	0	1	0	1	0	0 / 10
98121	2	0	0	1	0	1	0 / 10
98123	1	0	0	0	0	1	0 / 10

### Permanent Storage of Dialer Results

The result of each call attempt is permanently stored in your database. You can open your database easily from DialQuest.

1. Click on the Define Jobs button to open the Dialer Jobs screen.
2. Click on the **Open Database** button in the Phone Number Database section. This will open the database and table selected in the pull-down menus above.

### Viewing Survey Results

The responses to your Survey are stored in your database using SmartQuest. Please see the *Viewing Data* section in the **Data Management** chapter of the SmartQuest user guide.

## Chapter 4

# Viewing Results

## Viewing Dialer Job Results

### Temporary Viewing of Dialer Results

Dialer job results are stored in your database, but you may occasionally want to check your progress. The **Dialer Job Results** screen allows you to view the results from previous or current jobs.

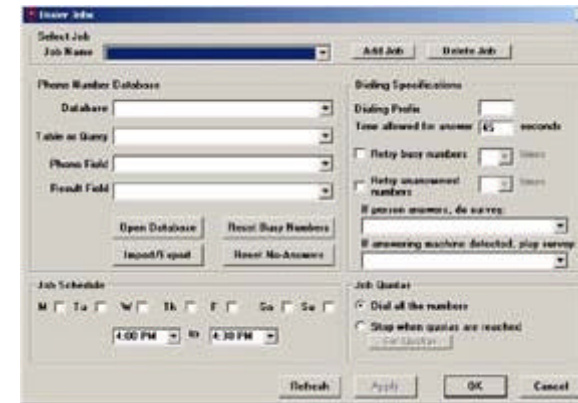
1. On the Dialer Job Schedule screen, click on the **View Results** button to see the Dialer Job Results screen.
2. Select a job from the **Select Job** pull-down menu at the top of the screen.

Job details are listed in the **Select Job** box. After the job name, you can see the date and time the job ran, which ports were used, and the status of the job (e.g. Active, Finished, Cancelled).

Results are listed in the **Results** box by Category (if no categories were defined, all results are listed in the category “ALL”). For each category, you can see the number of Attempts, Complete calls, answers by a live Person, Busy signals, answers by a Machine, and calls with No Answer. Note that a Complete call is defined when you set quotas. If no quotas have been set, then Complete calls will equal 0. The Quota and number of calls made toward the quota are also listed.

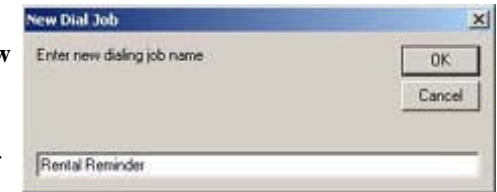
If you wish to see results sorted by a column, click on the column heading. To view results in a tab-delimited file, click the **Export** button.

When you are finished viewing results, click **OK** to return to the Dialer Job Schedule screen.



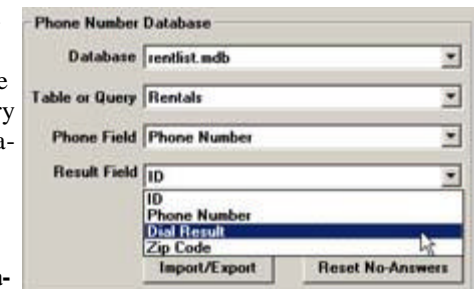
### Step 1. Select Job

1. Click on the pull-down menu under Select Job and select **Add New Dial Job**. You can also click the **Add Job** button.
2. A dialog box will ask you to enter a name for your job. When you are finished, click OK.



### Step 2. Select Phone Number Database

1. First, you will need to create a database and a table that contains your set of phone numbers. This database must be located in the same directory as SmartQuest (in a standard installation, this directory will typically be C:/Program Files/TeleSage).
2. On the Dialer Jobs screen, use the pull-down menu to select your **Database**.
3. After you have selected your database, the tables and queries your database contains will appear in the **Table or Query** pull-down menu. Select the table or a query that contains your set of phone numbers. Importing data and building a query are discussed in Chapters 5 and 6.

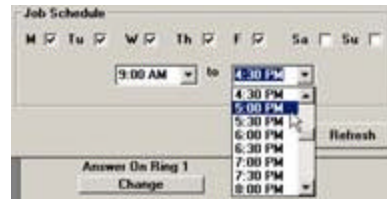


- After you have selected your table or query, the fields that the table contains will appear in the **Phone Field** and **Result Field** pull-down menus. For the Phone Field, select the field that contains the phone numbers to be dialed. For the Result Field, select the field reserved for DialQuest to report the result of each dial attempt.

*Tip:* In the database, the Phone Field should be populated with phone numbers and the Result Field should be blank so that DialQuest can write information about the dial attempt. If the Result Field is not blank, DialQuest will not call the corresponding number in the Phone Field.

### Step 3. Set Job Schedule

This feature allows you to choose when DialQuest will make calls. Use the check boxes to select which days of the week calls will be made. Use the pull-down menus to set the range of hours calls will be made.

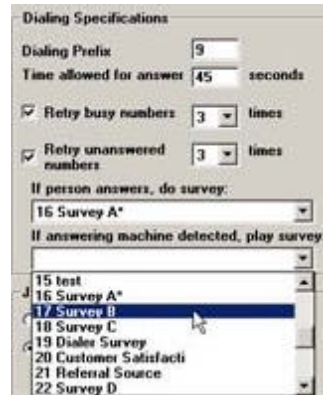


*Tip:* If your database contains phone numbers from across the country, schedule different jobs for different time zones. All times refer to the real-time clock on your PC.

### Step 4. Set Dialing Specifications

You can specify settings for your dial job, such as which survey to administer and how to dial out of your phone system.

- Enter any prefix your phone system requires to dial out (such as a 9) in the **Dialing Prefix** box. If all the numbers in your database are in the same area code, you can leave out the area code in the database and enter it here in the Dialing Prefix box instead. If you need a prefix to dial out and you also wish to use an area code, simply separate with a comma (example: 9,206).
- In the **Time Allowed for Answer** box, enter the number of seconds you would like DialQuest to try each number. If no busy signal, answering machine, or live person is obtained, DialQuest will continue to ring for the number of seconds you enter here.



- When you are finished, click **OK**.

### Removing a Job

- On the Dialer Job Schedule screen, select the job you wish to remove by clicking on its ID number.
- Click **Remove**. This will not delete the job; it will remove the job from the schedule.

### Stopping or Pausing an Active Job



- When a job is active, the **Stop Active Job** button will become visible. Clicking the red stop sign will stop the active Dialer job.
- You may want to pause an active job. You can pause jobs in SmartQuest by clicking the Stop Calls button on the main left-hand menu. To restart the job, click the Start Calls button.

### Restarting a Job

You may wish to restart a cancelled or interrupted job.

- On the Dialer Job Schedule screen, click on the View Results button to open the Dialer Job Results screen.
- On the Dialer Job Results screen, select the job you wish to restart from the pull-down menu at the top of the screen.
- Click the **Restart Selected Job** button. This will open a dialog box that will ask if you would like to restart job #[Job ID]. Click **OK**.

## Chapter 3

# Scheduling a Dialer Job

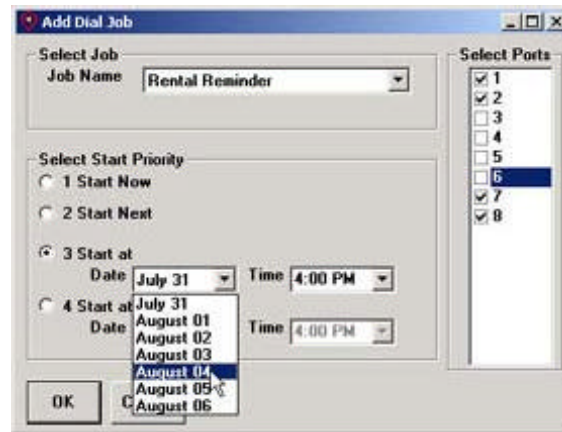
### Overview

After you have defined your job, add it to the **Dialer Job Schedule**.

### Adding a Job

1. On the Dialer Job Schedule screen, click **Add**.
2. Select the job you wish to add from the Job Name pull-down menu.
3. Select a starting time and priority for your job. Options include:

- **Start Now:** Begin the job, interrupting all active jobs.
- **Start Next:** Begin the job as soon as the ports are available, but do **not** interrupt any job.



- **Start At:** Begin the job at the specified date and time, interrupting all active jobs. You will need to select a date and time from the pull-down menus.
- **Start At or After:** Begin the job at the specified date and time and as soon as the ports are available, but do **not** interrupt any job. You will need to select a date and time from the pull-down menus.

4. Select the **port(s)** DialQuest will use for your job.

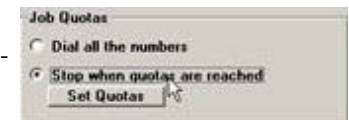
3. You may want DialQuest to redial phone numbers that initially return busy or unanswered results. Simply check the box next to **Retry Busy Numbers** and/or **Retry Unanswered Numbers** and then use the pull-down menu to select the number of times you would like DialQuest to redial the phone numbers.
4. Select the survey you want SmartQuest to administer when a person answers the phone. Use the pull-down menu under **If Person Answers, Do Survey** to select your survey. If you do not select a survey here, SmartQuest will administer its current Lead Survey.
5. You may want SmartQuest to play a different survey if an answering machine is detected. Use the pull-down menu under **If Answering Machine Detected, Play Survey** to select the survey you would like to play when a machine answers the phone. If you do not select a survey here, DialQuest will hang up when a machine answers the phone.

### Step 5. Set Job Quotas (Advanced Feature)

You may want DialQuest to stop dialing when a certain number of calls have been placed, a certain number of surveys have been completed, or other criteria have been fulfilled. For instance, you may have a job that consists of phone numbers across a city, and you want to make sure you get 10 completed surveys from each zip code. Defining quotas can help you reach your specific goals.

If you want DialQuest to dial all the numbers in your table as per your dialing specifications (described in the previous section), regardless of the result of the calls, select **Dial All the Numbers**.

If, however, you want DialQuest to stop dialing when certain criteria have been fulfilled, select **Stop When Quotas Are Reached**, and then click the **Set Quotas** button. This will take you to the Set Job Quotas screen to define your criteria. Note that once your quota has been met, busy and unanswered numbers will not be retried, regardless of the Dialing Specifications you set in **Step 4**.



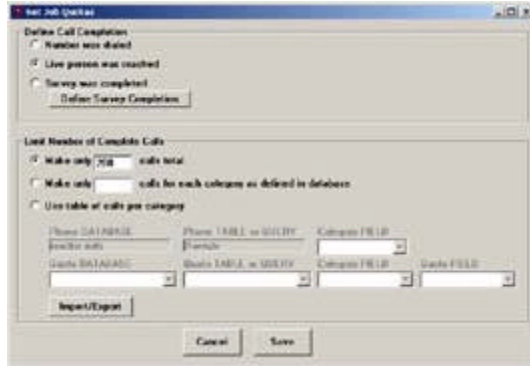
#### 1. Define A Complete Call

DialQuest can consider a call complete if the **Number Was Dialed**, a **Live Person Was Reached**, or the **Survey Was Completed**:

- **Number Was Dialed:** If you want DialQuest to call a set of phone numbers and count all outcomes (live person, answering machine, busy signal, etc.) toward meeting the quota, choose Number Was Dialed.
- **Live Person Was Reached:** If you want DialQuest to call a set of phone numbers and count only responses where a live person was reached toward meeting the quota, choose Live Person Was Reached.



*Example:* You want to reach 200 live people. Choose Live Person Was Reached and enter 200 in the Make Only \_\_\_ Calls Total box below. After DialQuest has detected 200 live people answering the phone, DialQuest will consider the quota met and stop dialing. Over 200 calls will be placed overall since DialQuest will not count answering machines, busy signals, etc. toward the 200 call quota.



- **Survey Was Completed:** If you want DialQuest to call a set of phone numbers and count only the outcomes in which your survey was completed, choose Survey Was Completed. If the person completes the survey logic, the call will be counted toward the quota total. If no one picks up, a busy signal is returned, an answering machine picks up, or the person answers some questions but does not reach the end of the survey, the call will not be counted toward the total.



*Tip:* If the call is only useful to you if a particular survey question is answered, you can define the call as complete if the person answered that particular Item. Click **Define Survey Completion**. Select your survey in the right-hand column and select the Item in the left-hand column, then click OK.

## 2. Limit Number of Complete Calls

Next, tell DialQuest how to limit the number of complete calls. Options include:

- **Make Only \_\_\_ Calls Total:** If you want DialQuest to make a certain number of calls from your database, choose Make Only \_\_\_ Calls Total and enter the number of completed calls you need.
- **Make Only \_\_\_ Calls for Each Category as Defined in the Database:** If you have several categories and need a certain number of calls for each one, choose Make Only \_\_\_ Calls for Each Category as Defined in the Database and enter the number of completed calls you need per category. The Phone Database and Phone Table or Query are filled in according to what you have selected on the Dialer Jobs screen (see **Step 2**). Select your **Category Field** from the pull-down menu.



*Example:* You want to survey 15 households in each zip code in your database and you have a field named *Zip Code* in your table. Enter 15 in the text box to indicate that you want 15 completed surveys from each category. Below, select *Zip Code* from the Category Field pull-down menu to indicate that you want DialQuest to categorize your records by zip code.

- **Use Table of Calls Per Category:** If you have several categories and need a different number of complete calls made in each category, choose Use Table of Calls Per Category. In your database, you will need to create a table that links each category with a quota. Before each call, DialQuest will check this table and determine if the quota has been met for the category. DialQuest will meet the quota for each category before considering the Dialer Job complete. Point DialQuest to the Quota database, Quota table or query, Category field and Quota field by selecting them from the pull-down menus. Use separate tables for the phone numbers and the quotas.



*Example:* You want to survey households in several zip codes, but want to survey a different number of households in each zip code.

1. In your database, create a table called *quotas* that has two fields: *Zip Code* and *Quota*. The name *Zip Code* should correspond to the *Zip Code* field in your Phone table.
2. In the *Zip Code* field in your new table, enter each unique zip code from your Phone table.
3. In the *Quota* field, enter the number of surveys you need from each zip code.
4. On the Set Job Quotas screen, the Phone Database and Phone Table or Query are filled in according to what you have selected on the Dialer Jobs screen. Select *Zip Code* from the first Category Field pull-down menu.
5. From the Quota Database pull-down menu, select the database in which your new *quotas* table is contained.
6. Select *quotas* from the Quota Table or Query pull-down menu.
7. Select *Zip Code* from the second Category Field pull-down menu to indicate the field in which the category is contained.
8. Select *Quota* from the Quota Field pull-down menu to indicate the field in which the quota is contained.

When you are finished, click **Save** to return to the Dialer Jobs screen.

**Note:** If there are not enough available numbers to meet the quotas you establish, the job will finish without meeting the quota. For example, if you establish your quota as 1000 complete calls but there are only 500 numbers in your table, the quota will not be met.