DialVision

Chapter 2: DialVision Basics

Overview

The DialVision dialer (and scheduler) contains all the cases you and your fellow interviewers will work. The Dialer interacts with the soft phone on your computer and can also interact with the server handling the Web Survey. DialVision places a call at the click of your mouse and you can record the outcome of that call in the record of calls by simply clicking on the button corresponding to the call outcome. DialVision records the date and time of the call and then takes you to the next call to place. You can set an appointment with DialVision, and when the time comes, the system places the call for you or a colleague. All the cases that need to be called are in the single DialVision list and all the Field Interviewers (FIs) work from the same list. Until then, any FI who is working may place a call to a respondent. More than ever, you are part of a team. There is no such thing as having a 'hard' or 'easy' caseload. Everyone chips in to help bring every respondent into the fold.

Calls are actually placed by a VoIP phone system at CHRR. As the telephone system is connecting the call, DialVision puts some 'talking points' about the case on your screen so you will be ready to deal with whoever answers the phone. If the respondent is willing to do the interview right then, the system will be ready for you to launch the interview by clicking on the DialVision "**Survey**" button and start asking questions. If you need to set an appointment, or if you have another outcome to report, you will be able to perform all those functions. These options are described in more detail in the next chapter.

You can also search for a case using a feature in DialVision called "**Search Criteria**". Search Criteria can search a case by its unique ID (in this case the phone number) and bring it up for interviewing. If you need to make an appointment, click on the DialVision "**Call Back**" tab and enter the appointment. Be sure to use "**Call Back**" unless otherwise specified.

Users and Rights

Callers / Agents / Field Interviewers (FIs) - Callers are interviewers. As a caller, you will have rights to only the calling screens, which is essentially your focus as an interviewer.

Supervisors / Managers / Field Managers (FMs) - Managers and telephone research staff. Managers have rights to the calling screens as well as manager screens in DialVision that allow them to run ad hoc reports, view reports, manage cases, and monitor the daily call activity of interviewers.

Administrators - Administrators of DialVision will be CHRR staff, and staff at DialVision who are responsible for the setup, data maintenance, and overall function of the application.

Preparing to work each day...

At the beginning of each day you will need to log in to DialVision to dial outbound calls. In fact, each time you return from a break you will need to log back into DialVision. Before leaving for break or at the end of each day you need to log out. If you don't log out properly, you will remain in the system queue and you will continue to be assigned cases throughout the break or the non-working part of the day.

1. The soft phone will start upon logging into the PC. You will need to login to the soft phone to authenticate your user name and password. You will be provided this information. The soft phone enables you to make outgoing calls and converse over the Internet.
2. After logging into DialVision, the Survey is available at the touch of a button on the DialVision Screen.

3. You are now ready to work...

Even though DialVision, the Survey, and the soft phone are separate applications, they all work together to facilitate your tasks.

Accessing DialVision

Each interviewer will have a unique address for accessing DialVision. Just follow the steps in this section to access DialVision each time to you prepare to work. To access DialVision, double-click on the DialVision shortcut icon on your desktop. When you double-click on the icon, the following Web address https://www.moonfireasp.com/mflogin/default.asp will appear in a browser and the browser will open to the screen below.

In this initial screen below you will enter the unique email address assigned to you by DialVision staff. Your manager will provide you the following personal information for access and login.

DialVision email address (screen 1): _____

DialVision username (screen 2):   _____

DialVision password (screen 2):   _____

NOTE: If you are in production, make sure that **Live** is selected under **Database** on the screen below so that you enter the actual production area and not the training area. Click on the "**Login**" button, to begin access.
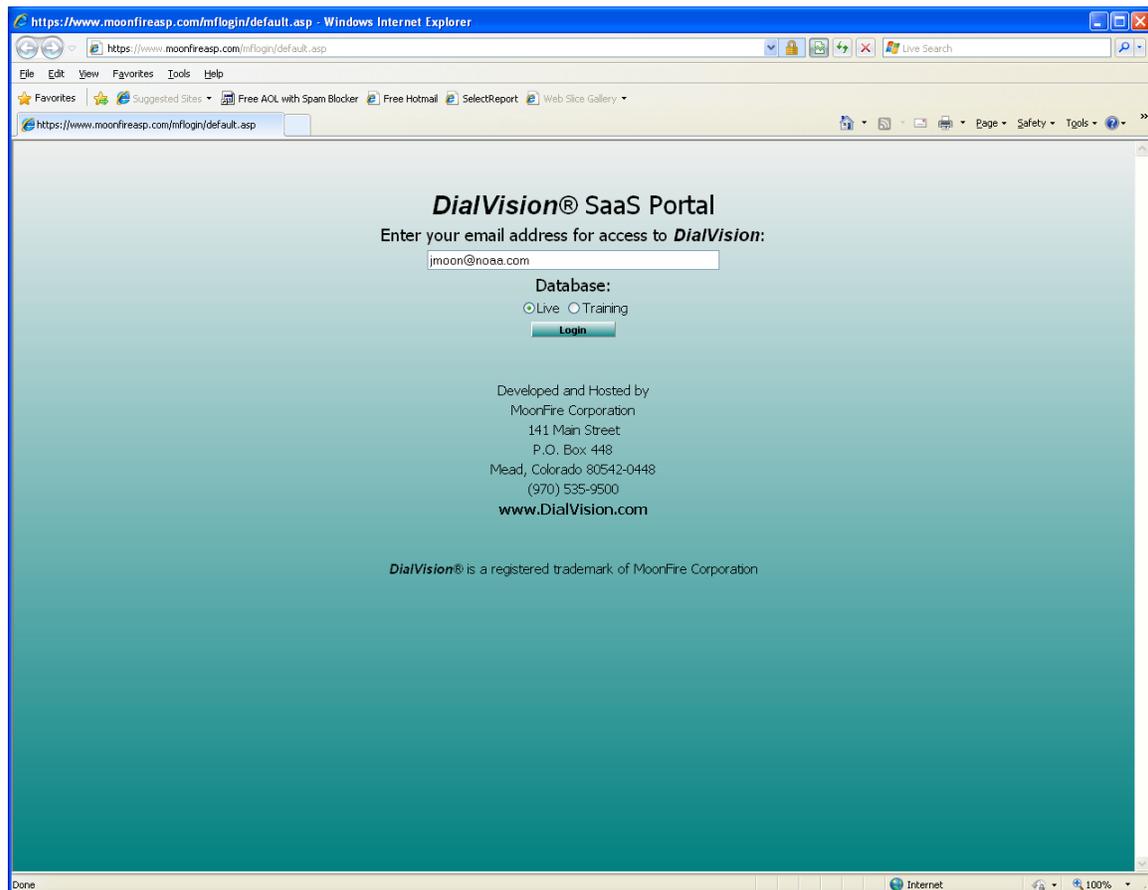
After clicking on the "**Login**" button, the screen below will appear.

Logging In to DialVision

At this login screen you will enter your assigned username and password. It is also important to make sure that the correct settings are entered before you continue. Please make sure that your login screen has the following settings before you move past this login screen. After the first time you log in, these settings will appear by default. However, please double check to make sure everything is correct before continuing.

Field	Log In
Username	*username*
Password	case-sensitive *password*
Dialing Device	TeleVantage Web
Dial Mode	Preview
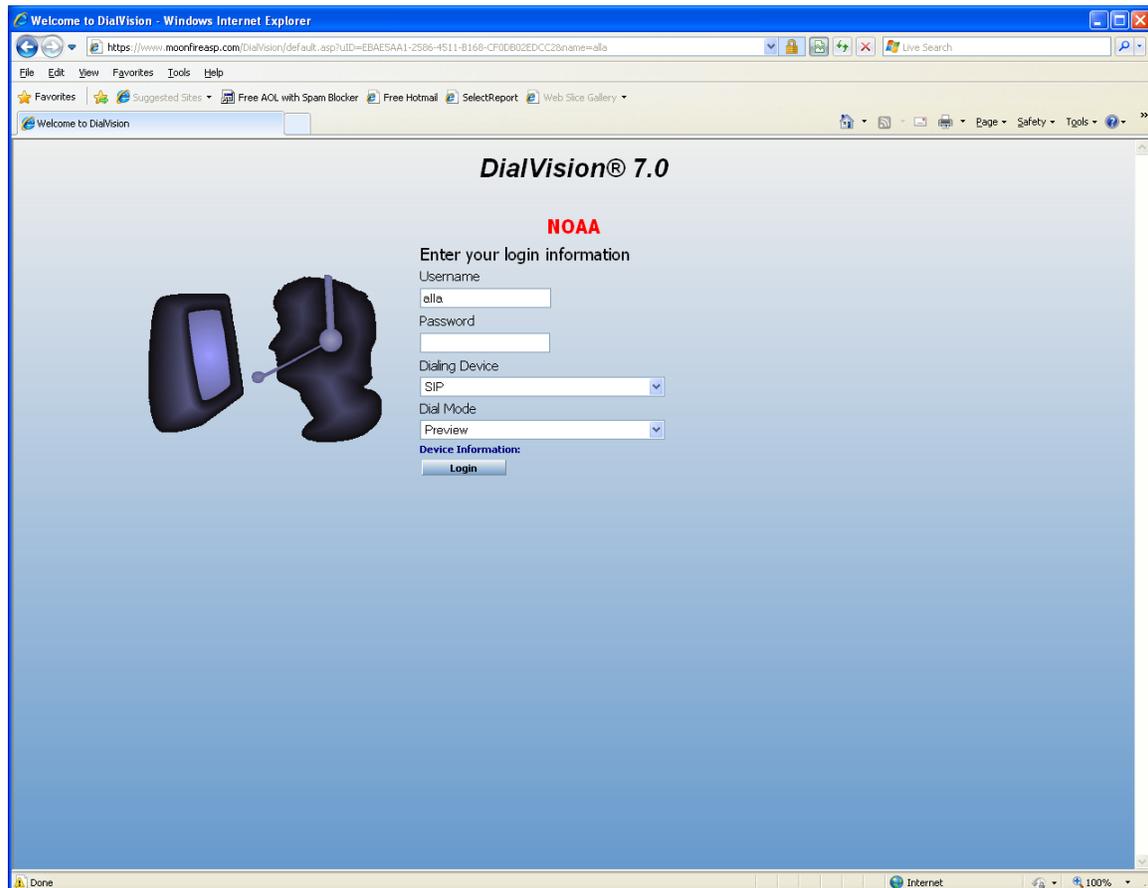
DialVision Set-Up

Digital Headsets / VoIP

Interviewers are provided with digital USB headsets that they will use to call each respondent in conjunction with DialVision. The technology used to place these calls is called Voice over Internet Protocol (VoIP), which means placing a call and talking with a respondent over the Internet. Using your Web connection and VoIP technology, the interview takes place directly over the Internet and the transfer of words or voice is unnoticeable to the interviewer as well as the respondent.

The USB headset you will be assigned plugs into the Universal Serial Bus (USB) port on your computer -- a rectangular hole at the rear or front of the computer. The port and plug are designed so you cannot plug it in upside down. The headsets provided should be used when interviewing live, because they have a chip in them that improves sound quality. Other headsets will produce unacceptable voice quality. You, the interviewer, might not hear the difference, but the respondent definitely will. The headset will not plug into your home phones.

During virtual training you will attend conference call from home for training. During this training you will complete exercises and will have you hands free. Regular headsets that can be plugged in to you home phone will be a must. They will also be required as backup in the event that a land-line or work phone must be used to place a call because the Internet phone system is not working well.

Dial Modes

The second DialVision login screen above allows you to choose among three dialing modes.

1. **Preview Dial Mode** - Allows the caller to preview a Prospect's record (information about a respondent) from the calling screen; the caller then dials the number when ready. This mode allows the caller to control the pace of the call.
2. **Progressive Dial Mode** - Further automates the calling process. Using this mode, the caller can review the respondent's information while the system does the dialing. You will not be using this mode.
3. **Manual Dial Mode** - Primarily used for practice and training. Also allows the interviewer to dial the 'practice' number without a preview of the Prospect's record.

Conducting an Interview

After you have logged in, you will see the "**Search Criteria**" screen shown below. If, instead, you get an error message stating **"Login is already on the system; please contact supervisor."** it means that you are already logged on to the system. If you are not sure what to do, contact your supervisor and he or she will instruct you what to do. If you want to learn what to do now, click here to go to the **Special logoff process**.

Search Information

The first screen you see when you enter DialVision is the "**Search Information**" screen. From this screen you may look up information on a case (prospect) by using various search criteria. Most often you will use the CaseID number to initiate a search, but other criteria such as Name, Address, etc. are available. When the searched prospect is located, you can select the Script to use and the List from the two drop-down menus.

The CaseID for this project is the respondent's telephone number.

Search Information   Elapsed Time (hh:mm:ss): 2:0:10

ANI Name: ANI Number: DNIS:

Prospect Search Criteria

CaseID:

Name (First, Middle, Last):   *

Address:

City, State, Zip: ** None Selected **

Phone: X: *

Employer:

Email:

Script: ** None Selected **   *

List: ** None Selected **   *

* Required Field for Adding New Prospects

| Search | Select | Take Next Call | Log Off |
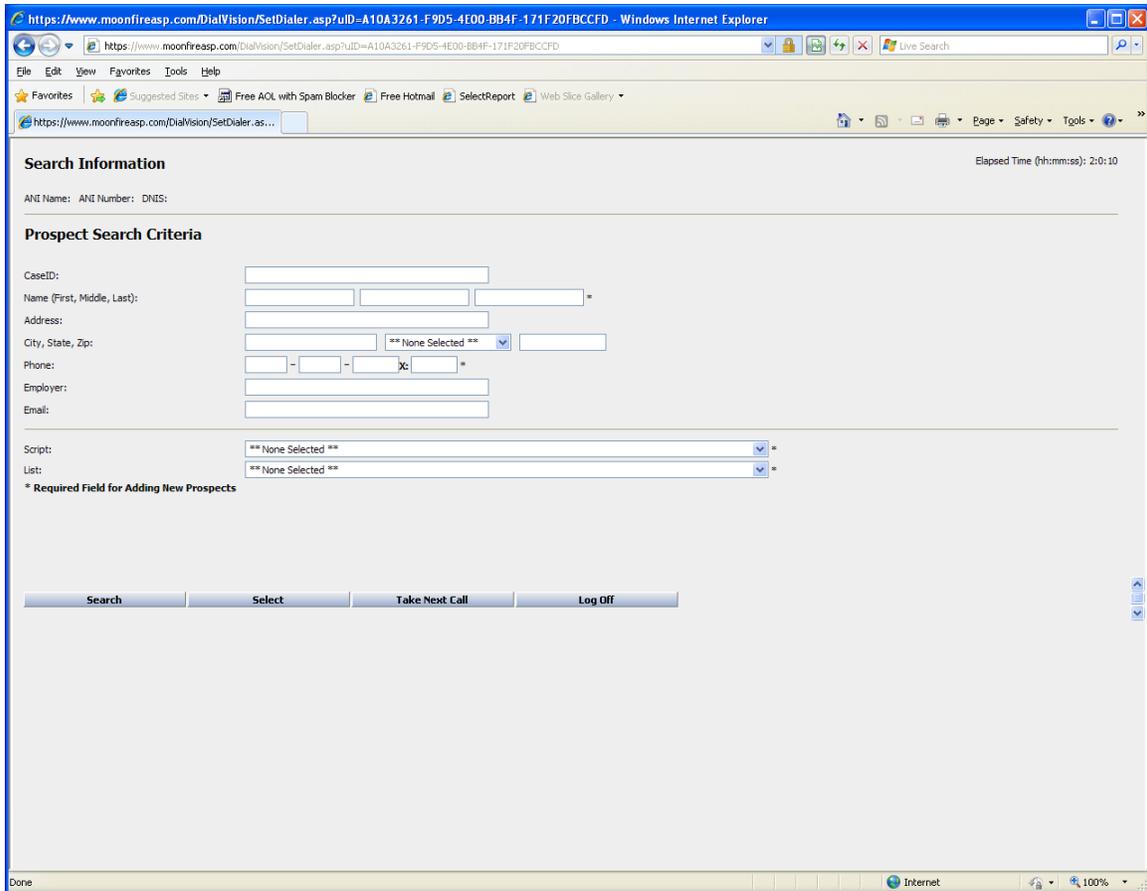
Across the lower portion of the screen there are four buttons that you can use to navigate this screen:

- **Search** initiates a search using one or more of the criteria in the Prospect (i.e., Respondent) Search Criteria.
- **Choose** allows the caller to 'choose' the prospect displayed on the Search Criteria screen above. You will not use this button.
- **Take Next Call** loads a new case selected at random, and moves to the Call Consent screen shown below.
- **Log Off** logs the caller off for a break or end of shift.

If you are ready to start a case, click on the "**Take Next Call**" button.

When you select "**Take Next Call**", DialVision will put the next case to dial up on the screen. In Preview mode you will see the prospect's case and have time to review it and the script before dialing the number. Get ready to go by putting on your headset and reviewing the fact sheet.

After the caller clicks on the "**Take Next Call**" button, the following screen appears with the Respondent's case loaded. The phone number to dial is located in the left column at the top next to **Phone1**. The respondent's demographic information is located in the middle of the larger box and the caller's script (Introduction:) is located just below that. The buttons to the right of the Introduction help move the interviewer through the introductory contact dialogue(s) depending on whom the caller is talking to.

https://www.moonfireasp.com/DialVision/SetDialer.asp?uID=89072A42-E6AC-4C6D-8154-23C4C50A52C6 - Windows Internet Explorer

https://www.moonfireasp.com/DialVision/SetDialer.asp?uID=89072A42-E6AC-4C6D-8154-23C4C50A52C6   Live Search

File   Edit   View   Favorites   Tools   Help

Favorites   Suggested Sites   Free AOL with Spam Blocker   Free Hotmail   SelectReport   Get More Add-ons

https://www.moonfireasp.com/DialVision/SetDialer.as...

Page ▾ Safety ▾ Tools ▾

Address

Phone 1:   (XXX) XXX-7322

Email:
Prospect: 9:13 AM Eastern
Employer:
Spouse Employer:

Dataset: NOAA
Campaign: ALDS
List: Sample List
Resume Script: NOAA CHTS SCRIPT

Idle...

Calling:

Last Outcome:

Hang Up   Done

NOAA SURVEYS

Project Director:
Kathleen Carr
1-800-341-3660

EMAIL CHTS & ALDS:
noaa@chrr.osu.edu

PHONE CHTS & ALDS:
1-866-563-6904

WEB SITES:
www.noaa.gov
www.chrr.osu.edu

Household ID   6144427322

Region of Residence   Northeast
State of Residence   Ohio

County of Residence   Franklin

CHRR TECH SUPPORT:
1-866-456-0506
noaatech@chrr.osu
noaahelp@chrr.osu

TOTAL INTERVIEWS
TOTAL REMAINING

Perhaps you can assist me/ Hello,
I'm calling to conduct a survey for the National Marine Fisheries Service of the U.S. Department of Commerce.

INTERVIEWER: For HAWAII please read :

Perhaps you can assist me/ Hello,
I'm calling to conduct a survey for the State of Hawaii's Division of Aquatic Resources and the U.S. National Marine Fisheries Service.

INTERVIEWER: For all states

SPEAKING TO ADULT
ADULT UNAVAILABLE SET CALLBACK

Favorites

Call Back   Last Question
Call History   Caller Notes
Rebuttals   Quick Facts
Outcome   ALDS SURVEY
PARTIAL   MAPS
Manager

Prospect   History   Financial   Info   Outcome

Done   Internet   100%

Joining (dialing) the respondent's number

When the caller is ready to dial the number, the caller should press the button located to the right of Phone1 where the 9-digit respondent's number appears. The respondent's telephone number will be dialed automatically in the soft phone. When the call has been connected, the caller may initiate the interview. If you are unable to connect with the respondent, please press the "**Hang Up**" button in DialVision to terminate the call.

When the respondent is ready to do the interview, click on the "**Survey**" button under the Favorites list to start the web survey in the Web Survey window. The instrument will open only if you have an active call. You will then conduct the interview using the Web Survey application described in your interviewer manual.

Note: When the survey has begun, please maximize your survey screen so that the DialVision screen in the background does not distract you and so that you don't mistakenly click on a DialVision button during the Survey.

When the interview is terminated the Web Survey application will disappear and you will be returned to the DialVision screen. You will then need to press the "**Hang Up**" button in DialVision to terminate the call.
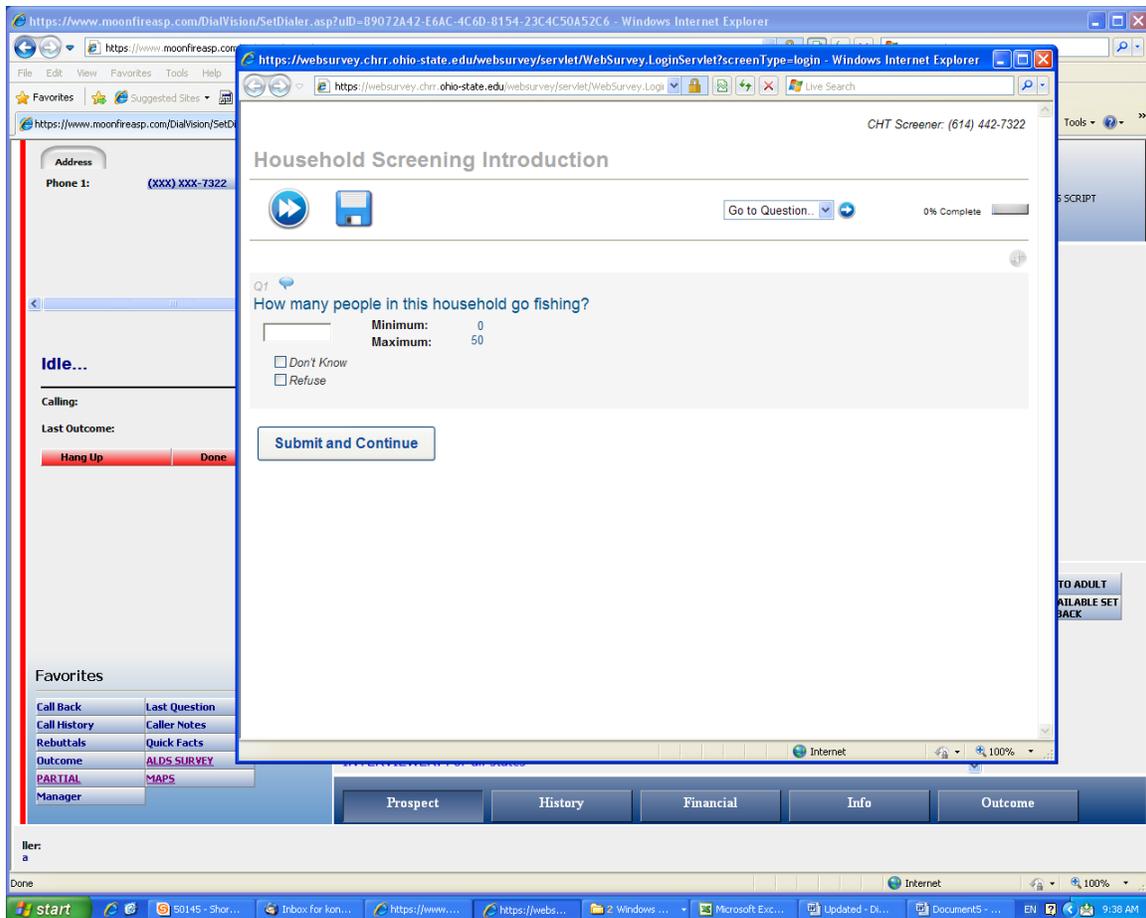
If you are logging off of DialVision, continue with the section below. Logging off of DialVision is also discussed at the end of the next chapter.

Logging off of DialVision

Logging off of DialVision is an important process. How to log off depends on where the caller is in the process. There are three distinct procedures for logging off and the procedure that should be used is dictated by where the caller is in DialVision.

1. If the caller is at the Search Criteria screen, shown below, and wants to logoff, the caller must simply click the "**Log Off**" button, which will take him or her back to the login in screen at which point they can simply X-out of DialVision. The caller is done and properly logged off.

X-out means using the 'X' button in the top right corner of the Internet Explorer browser to close it.
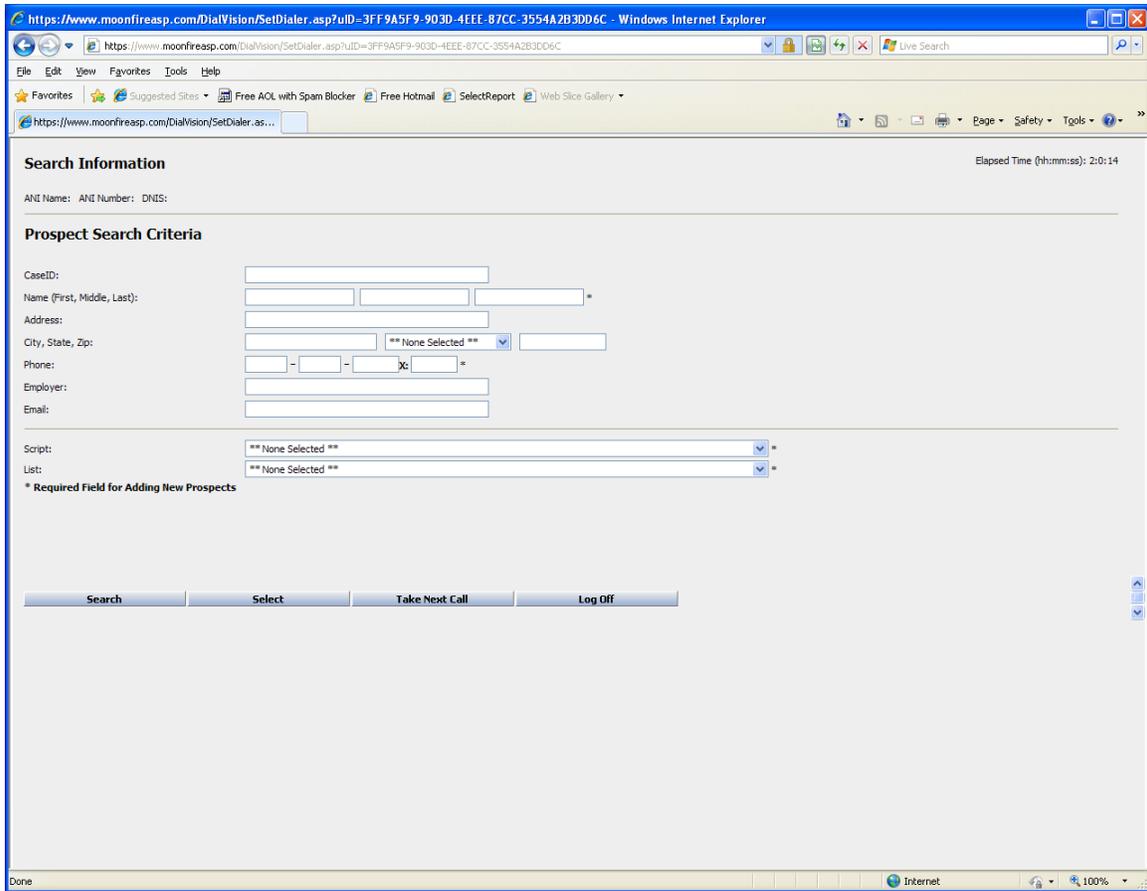
2. If the caller is in the process of making calls and has just finished with a case, the caller will be asked if he or she 'wants to take the next call', shown below. If the caller wants to log out and not take any more calls, he or she must simply click on the red "**No**" button which will take them back to the DialVision login screen at which point they can simply X-out of DialVision. The caller is done and properly logged off.
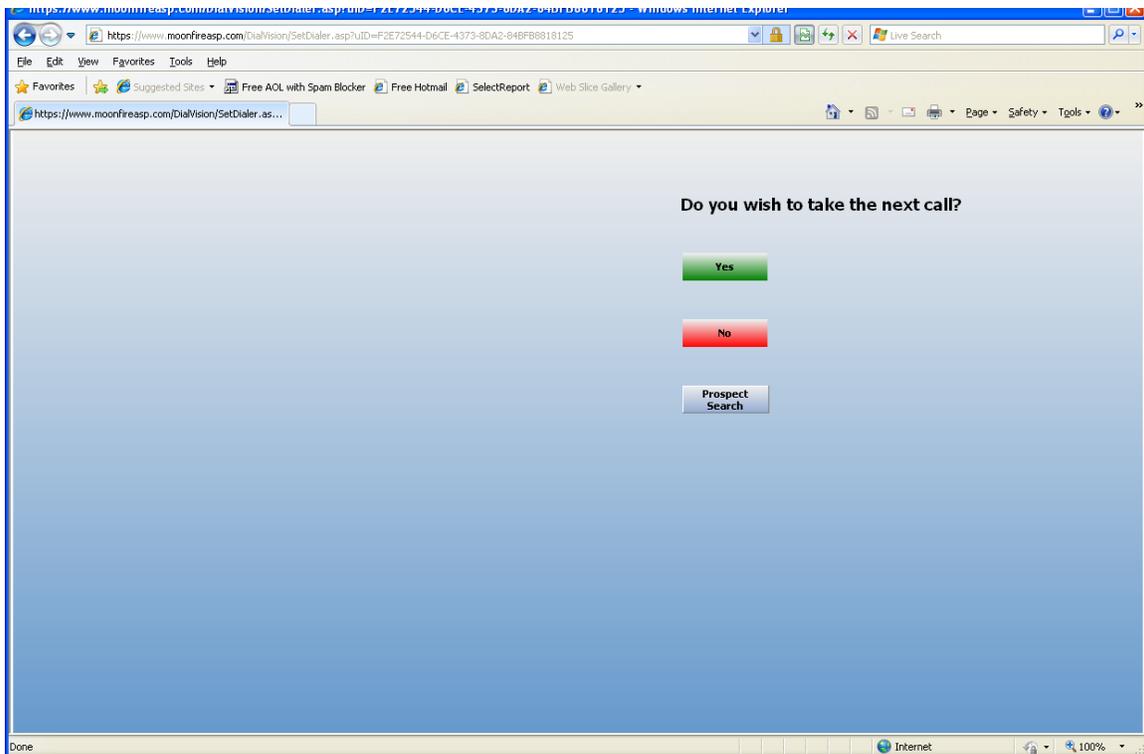
3. If the caller does not log out properly by using either of the two above procedures, it means the caller mistakenly used the X-out method of closing the browser's window from a screen other than the login screen. This breaks the browser's connection to the software, but does not disconnect the caller from the DialVision software. In this situation, the system thinks the caller is still logged in even though DialVision is closed out. To remedy this situation, the caller must go through a special process in order to logoff properly.

Special logoff process

A caller will know that he or she did not log out properly during the last session because when the caller attempts to log in to a new session, he or she will get a message that says: "Login is already on the system; please contact supervisor".
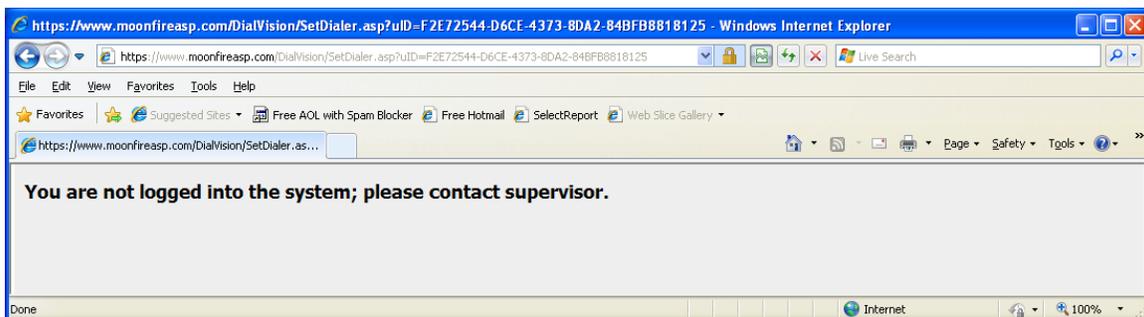

The process to log off and log on again involves a series of steps. From the above message, press the "**Back**" button on the browser to view the screen below. You just used this screen, but you must now use it differently to terminate the current connection.

- Delete your user name and type "**logoff**" in the Username field.
- Then type your personal user name (the one you just deleted) in the Password field.
- Press "**Login**".

You will then get the message shown below. Even though you think you have just accessed DialVision, in the steps above you just terminated the DialVision connection and must re-establish it again. Click on "**Take me there**".
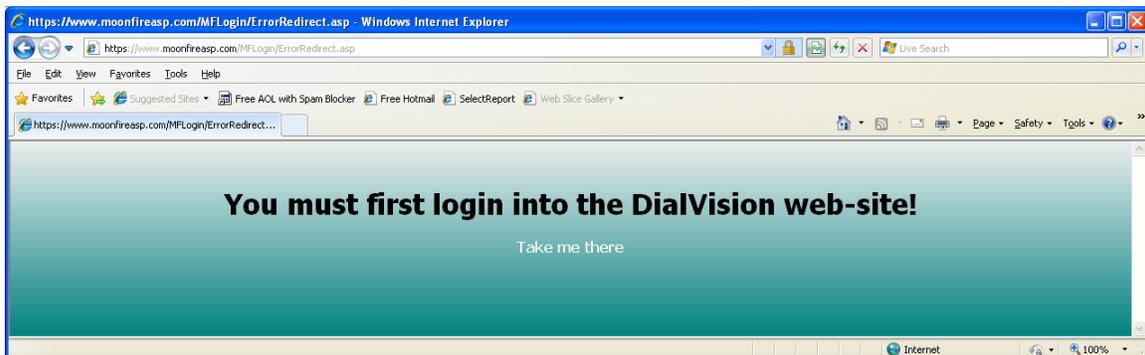
The DialVision ASP portal page will appear and you can begin the normal access DialVision and login procedure all over again. To review the access and login screens and procedures, click here.

DialVision® SaaS Portal

Enter your email address for access to *DialVision*:

jmoon@noaa.com

Database:

○ Live ⦿ Training

Login

Developed and Hosted by
MoonFire Corporation
141 Main Street
P.O. Box 448
Mead, Colorado 80542-0448
(970) 535-9500
www.DialVision.com

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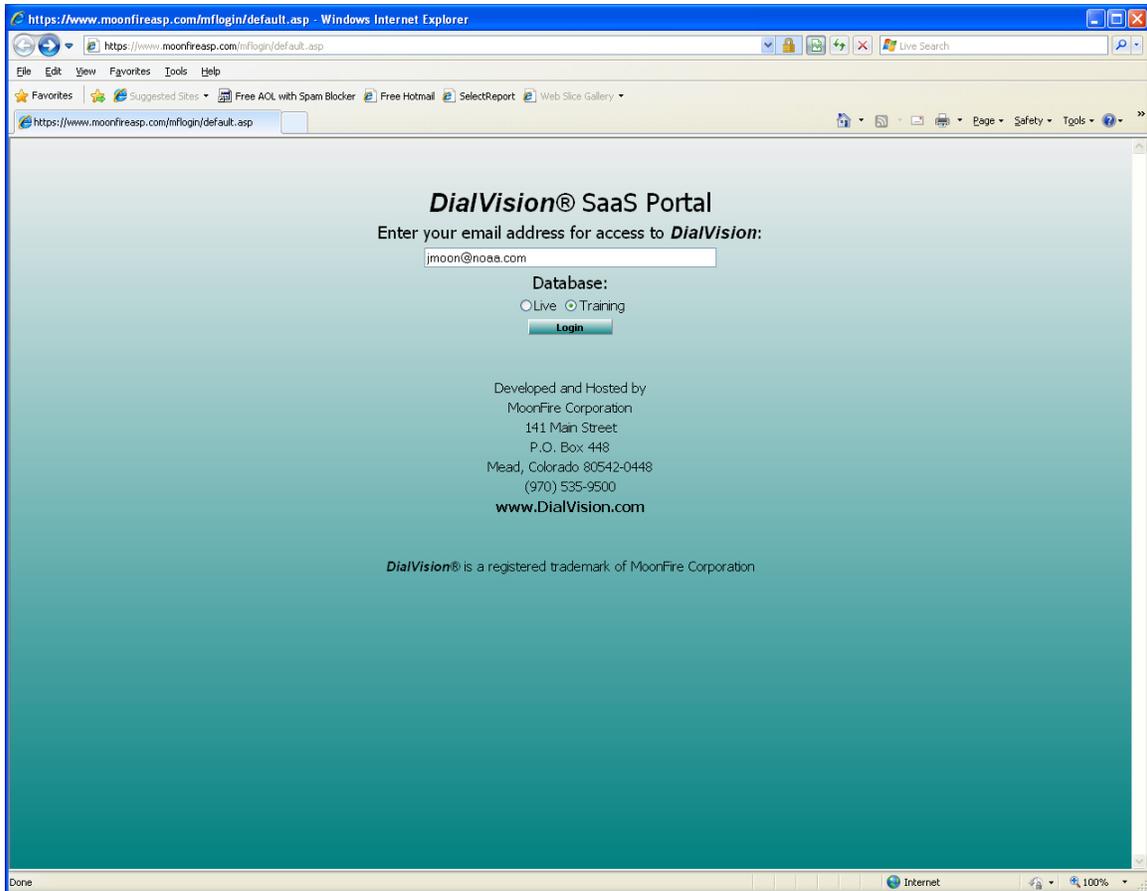
If, for some reason, you get the message shown below, during any of the login or logoff processes mentioned in this chapter, you probably typed your user name or password incorrectly when logging in or you are not cleared to use "Live" database mode; or when doing the special log off procedure, you typed something other than "logoff" or mistyped your user name in the password field. You should, then use the "**Back**" button on your browser and retype the information.

Login and password combination not found; please try again.
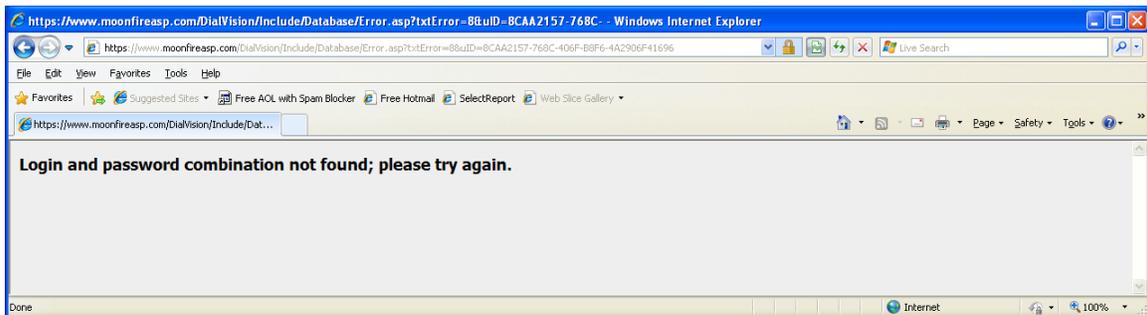
It is important to logoff correctly from DialVision when you take a break or are finished working for the day. If you are not logged off correctly, DialVision will assume that you are available to make calls and continue to assign you calls. If you are not sure if you've logged off correctly please alert your supervisor, who can assist you

Go to: Quiz for DialVision®: Chapter 2:
DialVision® Basics
Chapter 3: DialVision® Functions