

Quota Management - .T "Switches"

Quota-Controlled Switches

Most projects are programmed with special quota entries in the QSS that act as on/off controls -- or value-based triggers -- for specific behaviors within the survey program. These are commonly referred to as "switches." Unlike standard quotas that track completes toward a target, or act as counters for various call results, switches are quota cells whose sole purpose is to signal the program to behave differently based on the value currently set. The program checks the switch value and responds accordingly -- enabling or disabling features, changing what interviewers see, or altering how the dialer and sample interact with the job. All switches are controlled via their .T (target) value.

Who Changes Them

Anyone with QSS access can modify a switch value, but changes should only be made at the direction of the PhoneOps Manager or the Project Director. Making an unauthorized or incorrect change can immediately affect interviewer behavior, dialer operation, or quota logic across the entire project.

How They Work

A switch is a named quota cell whose target value (.T) the program actively monitors at runtime. When the value is changed, the program responds by altering its behavior accordingly. Some switches use a simple two-state value where each number triggers a distinct behavior. Others accept a numeric value that sets a specific threshold or count. Each switch's behavior is defined by the programmer -- the value itself has no universal meaning across all switches.

Important: Not Every Quota Is a Switch

Because of how Survox handles quota tracking, every quota entry in the QSS -- regardless of its purpose -- automatically gets three columns: a running total counter on the left, a resettable daily counter (.R) in the middle, and a target value (.T) on the right. This means every quota has a .T field, whether or not that field actually does anything meaningful.

For standard tracking quotas -- such as complete counts by demographic group -- changing

the .T value simply adjusts the target threshold. It does not trigger any special program behavior.

Switches are a specific subset of quotas that have been programmed to watch their own .T value and act on it. If a quota is not programmed to respond to its .T value, changing it will have no effect on program behavior beyond the quota counter itself.

When in doubt about whether a quota entry is a switch or a standard tracking quota, consult the programmer or the PhoneOps Manager before making any changes.

Changing a Switch Value

Switch values can be changed through any of the following methods:

QuotaMod (via PuTTY) -- Available when the job is not actively running. Connect to the server via PuTTY and run the QuotaMod utility to directly edit quota values for the job.

Super/Boss Command Line -- While connected to the server via a super/boss session, the command `qss jobname mod` can be used to open and modify the QSS for the specified job directly from the super or boss environment.

Survox Console -- From the Console, navigate to Manage, then Quotas, then Named, and select the project from the list. This method is available whether or not the job is active and is the most accessible option for supervisors who do not work directly in the server environment.

Switch changes take effect immediately, though interviewers in the process of conducting an interview may not see them until their next call is attempted, as most quotas are only read at the start of the call. Some quotas, like TQ logic and the ASK_UP questions are real-time however.

Standard Switches

The following switches are present in all standard jobs and appear in the QSS in the order listed below.

JOBLIVE.T

Controls whether the job is open for interviewing.

- 1 = Job is active; interviewers can log in
- 0 = Job is offline; no interviewer logins are permitted

Use this to prevent early logins before a shift begins, or to close the job at the end of the night.

QVERSION.T

Tracks the current version of the survey program.

- 1 = Initial study version
- Any value greater than 1 = A subsequent updated version

When the programmer makes a live change to the survey (via the .qff file), incrementing this value signals interviewers that a new version is available. Interviewers will be prompted to log out and back in to load the updated survey. This switch should only be changed after the .qff file has already been updated on the server.

FORCE_LOGOFF.T

Forces interviewers out of the survey after their current call completes.

- 0 = Interviewers may remain logged in between calls
- 1 = Interviewers are logged off automatically after their next call finishes

This switch works in tandem with JOBLIVE.T. Setting JOBLIVE.T to 0 closes the job, and setting FORCE_LOGOFF.T to 1 ensures interviewers who are still active are properly logged out after completing their current call -- including those who may not be monitoring Slack for end-of-shift notices.

TESTING.T

Controls whether the survey is running in live or testing mode.

- 0 = Survey is in live mode; normal interviewing rules apply
- 1 = Survey is in testing mode; Ops staff and clients can back up through the survey in places a live interviewer could not

Testing mode makes it easier to verify skip logic, terminate conditions, and quota routing without interfering with production interviewing.

DAILYQUOTA.T

Sets a daily complete goal for the project.

- 999 = No daily limit is in effect
- Any other value = Interviewers are notified that the daily quota has been met when DAILYQUOTA.R reaches this number

Leave at 999 when no daily cap is needed.

NO_SUCH_PERS.T

Controls visibility of the "No Such Person" disposition code on the intro and disposition screen.

- 0 = The "No Such Person" code is visible and available to interviewers
- Any non-zero value = The code is hidden from the screen entirely

Use this when the "No Such Person" option is not applicable for a particular study or sample type.

TQ_NAMEFILE.T

Controls whether the survey will allow someone other than the listed contact name to complete the interview.

- 0 = Only the person whose name is on the record may complete the survey; anyone else receives a message that we can only speak with the listed individual
 - Any non-zero value = Other household members or respondents are permitted to continue past the name check
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TQ_*.T

A family of switches used to disable specific terminate questions on a per-question basis. The asterisk represents the label of the question being controlled -- for example, TQ_Q5.T or TQ_INCOME.T.

- 0 = The question follows its normal programmed terminate logic
- 1 = The terminate condition at that question is bypassed; the interview continues past what would otherwise be a disqualifying answer

These switches are used when a client requests that one or more terminating questions be disabled -- typically to improve incidence rates or to allow a broader range of respondents to complete the survey. Each TQ_*.T switch controls only the specific question referenced in its name.

DLR_GETSPEC.T

Controls whether interviewers on the predictive dialer can search for a specific phone number before it is dialed -- referred to internally as "putting the box up."

- 0 = Interviewers in predictive dialer mode receive calls as normal; no number search option is available
- 1 = Interviewers can search for and request a specific phone number prior to dialing

This switch acts as a bridge for dialer-based interviewers who would not otherwise have access to the number search function.

ALLOW_RSLV.T / ALLOW_SPCL.T / ALLOW_HDDN.T

Three separate switches that control whether interviewers can pull up Resolved, Special Type, or Hidden sample records during a number search.

- 0 = That record type is not accessible during a search
- 1 = Interviewers may retrieve that record type during a search

All three of these switches require DLR_GETSPEC.T to also be set to 1. The number search option must be active before these controls have any effect.

WEB_LASTQ.T

Used in SMS and web-based jobs only. Controls whether the final survey question -- asking respondents if they are willing to provide their name -- is displayed.

- 0 = The question is skipped; the survey ends without it
 - 1 = The final name-request question is shown to the respondent
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WEB_ALLOWBKUP.T

Used in SMS and web-based jobs only. Controls whether respondents can back up to a previous question.

- 0 = No backup option is available; respondents move forward only
 - 1 = Respondents may back up between questions
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Demographic Move-Up Switches (ASKXYZUP.T)

Some jobs include additional switches named in the format ASKXYZUP.T, where XYZ represents a specific demographic question -- for example, ASKRACEUP.T or ASKAGEUP.T.

- 0 = The question appears in its normal position in the demographic section
- 1 = The question is moved forward into the screener section

Moving a demographic question into the screener allows the system to apply quota controls on that characteristic earlier in the interview, before a full complete is recorded. This is used when tighter demographic quota management is needed on a particular study.

Conclusion

Switches are powerful tools when used correctly. A single value change can alter the experience for every interviewer on a live job, so always confirm with the PhoneOps Manager or Project Director

before making any modifications. As projects grow in complexity, the number of switches present in the QSS may expand beyond those listed here. When encountering an unfamiliar switch, always consult the programmer or project documentation before changing its value. Understanding what each switch does -- and equally important, what it does not do -- is key to managing a job effectively without introducing unintended behavior mid-shift.

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