

Confirmit Horizons v2020

This is revision 4 of the Confirmit Horizons v2020 Professional Authoring User Guide published in November 2020. The information herein describes Confirmit Horizons Professional Authoring and its features as of Build nr. 2020.11.60. New features may be introduced into the product after this date. Go to www.confirmit.com or check “News” on the Customer Extranet for the latest updates.

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The companies, names and data used or described in the examples herein are fictitious.

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What's New in this Revision?

The following changes have been made in this revision:

Note: Only the latest changes to this documentation are listed here. Changes made to earlier revisions are listed in the "Changes to the User Documentation" document which can be downloaded from the Confirmit Extranet at https://extranet.confirmit.com. Note that you will need to log in to the extranet to download this document.

- The default file library space allocation for new companies is increased (see Limitations on page 157 for more information).
- A Warning note is added to the Question ID section (see Question ID on page 235 for more information).
- The text and an image in the How to Upload a List of Users section are updated (see How to Upload a List of Users on page 774 for more information).

Note: The general layout and language in this document is continually being corrected, adjusted and improved to ensure the user has the best possible source of information. Only NEW information and details of functionality that has changed since the previous revision are listed here - minor corrections to the text and document layout are not listed.

Important!
We need your feedback so we can improve this document and provide you with the information you require. If you have any comments or constructive criticism concerning the content or layout of this documentation, please send an email to documentation@confirmit.com. Please include in your email the section number and/or heading text of the section to which your comment applies.

1. What is Horizons?

Confirmit Horizons is a comprehensive set of Web-based information retrieval and presentation software applications. The Horizons system comprises two main applications, and a number of “specialist” add-ons for the Authoring application to expand the system for use in specialized areas:

- **Authoring** - the application with which the user creates the survey questionnaires. Two "levels" of user are defined; Professional and Standard.
- **Reportal** - the application with which the user creates reports based on the data gathered by the questionnaires.
- **Professional Panels -** allows you to set up and manage panels (groups of people, possibly several million) who have agreed to be available to answer surveys.
- **CATI -** Computer Assisted Telephone Interviewing, for setting up and managing telephone interviews.
- **CAPI -** Computer Assisted Personal Interviewing enables the same advanced and sophisticated capabilities typical to online surveys to be used for offline face-to-face field work or for self-completion of the surveys.
- **SmartHub -** a centralized area for data management and optimization allowing multiple data sources of different types to be brought together.
- **Action Management -** a system for initiating, coordinating and accelerating organization-wide action response to survey feedback.
- **Active Dashboards -** a module for Confirmit Horizons that provides interactive, role-based dashboard technology.
- **Genius -** a text analytics application for analyzing text responses to survey questions.
- **Model Builder -** an application for creating the database (the model) used by Genius to analyze text responses.
- **Flex -** Confirmit Horizons inbuilt extensions functionality.
- **CRM Connect for Salesforce -** allows users to setup and manage data integrations with Confirmit Horizons and Salesforce through a simple graphical UI. The documentation for CRM Connect is available in the Confirmit Data Processing Manual.
- **Translator -** simplifies the translation of survey texts into other languages.

While this document describes the Professional Authoring application, the abbreviate term 'Authoring' used herein refers to both the Professional and Standard Authoring versions of the application. For further information on the other applications, refer to the specific user documentation.

1.1. About this Manual

The Confirmit Horizons software is available either as a server installation or via “log-in”. The two variants do not differ substantially, but where they do, “log-in” specifics are marked with the text “SaaS Environment only”.

This document refers to different URLs, for example http://author.confirmit.com for Authoring and http://survey.confirmit.com/... for interviews etc. These URLs refer to Confirmit's SaaS installation with Rackspace in USA. If you are a Confirmit Horizons On-Premise customer, or use another Confirmit Horizons SaaS installation, you must replace the domain name in the URL with those given to you by your server administrator.

Note that in this document the terms “question” and “form” mean the same.

1.2. Types of Confirmit User

The Horizons platform includes a wide variety of features and functionalities for survey authoring, data management, and reporting. Optional modules and features can also be enabled to enhance the core platform, providing additional functionalities. Optional modules and features include but are not limited to: Action Management, Active Dashboards, CAPI, CATI, Discovery Analytics, Genius Text Analytics, Hierarchy Management, Instant Analytics, Model Builder, Panel Management, CRM Connect and Translation.

To ensure maximum data security and guarantee your staff has access to the functionality they need, Confirmit Horizons employs an array of user roles and permissions. Note that your users will only have access to modules and features that are enabled in accordance with your Confirmit contract, regardless of all other factors.

The user roles include:

- Professional User
- Standard User
- Analyst User
- CATI Supervisor
- CATI Interviewer
- CAPI Supervisor
- CAPI Interviewer
- Translator
- System Administrator
- Report Viewer Access
- Report Analyst Access
- Survey Dashboard & Instant Analytics Access

These roles and permissions are described in more detail in the following sections and in Appendix G: User Roles and Permissions (see APPENDIX G: USER ROLES AND PERMISSIONS on page 868 for more information). In addition to the most common user types listed above, Confirmit also has Designated User roles for staff members responsible for managing the more technical aspects of your Confirmit Horizons platform.

SaaS only:
Contact Confirmit Professional Services support@confirmit.com to change the user level.

1.2.1. Professional Users

Professional users can have access to the full range of Authoring functionality, depending on the add-ons licensed by their company and the permissions allocated to them by their system administrators. Professional users must acquire the most complete knowledge of the Confirmit web application; they are typically responsible for the following areas of a survey:

- Initiating a new survey
- Programming questions and skip logic in Survey designer
- Setting up survey properties (permissions, public survey/limited survey etc)
- Handling respondents in limited surveys
- Building panels of respondents
- Compiling/generating interview files to make the survey go “live”
- Maintaining and extending the library of interview layout templates
- Extending the library of questionnaires, questions, and forms
- Creating and publishing reports
- Providing to the end users of results, access to reports online
- Professional users also have access to the File Library functionality (see File Library on page 157 for more information).

This documentation is written principally for the Professional user, as this is the "complete set" of information. Standard users will be operating from a reduced menu system, so they will find that some functionality described in this documentation will not be available to them; Standard users should ignore those parts of this documentation that do not apply to them (see Standard Users on page 3 for more information). For Express users, a separate document exists describing the Express functionality - refer to the Express User Guide for further information.

The system requirements for Confirmit users and respondents are described later in this section (see System Requirements on page 11 for more information).

1.2.2. Standard Users

The Standard user level is intended for those who use Confirmit on a less-frequent basis (weekly or monthly), and who do not need or do not have time to learn the volume of functionality and properties available to the Professional user. The menu system and functionality available for the Standard user is therefore considerably reduced from that of the Professional user, giving a tidier and easier to use screen layout.

This documentation is written principally for the Professional user, as this is the "complete set" of information. Standard users will be operating from a reduced menu system, so will find that some functionality described in this documentation will not be available to them. This will become apparent to the user as he/she uses the system, so Standard users should ignore those parts of the documentation that do not apply to them.

The functionality that is available to both Standard and Professional users operates in the majority of cases in the same way, so is described in this document only once. In these sections, where differences occur, the differences are emphasized in the text. Any functionality that is particular for the Standard user is described in separate sections in the appropriate chapters.

1.2.3. Analyst Users

Analyst users are those who need access to review or analyze system data and perform functions in Active Dashboards, Action Management and Discovery Analytics.

Refer to the appropriate user guide for further details.

1.2.4. CATI Users

CATI Supervisors are the individuals responsible for directing the day-to-day CATI operations. interviewer accounts, manage sample and quotas, review CATI reports and dashboards, monitor interviews, edit verbatims, and play back recordings.

CATI Interviewers are the individuals responsible for conducting CATI interviews. This user is only able to view the surveys and respondents that are assigned to them.

Refer to the separate CATI Supervisor Guide for further details.

1.2.5. CAPI Users

CAPI Administrators are the individuals responsible for directing the day-to-day CAPI operations. This user is able to create and manage field force interviewer accounts, and review CAPI reports and dashboards.

CAPI Interviewers are the individuals responsible for conducting CAPI interviews. This user is only able to view the surveys, respondents and quotas that are assigned to them.

Refer to the separate CAPI Administrator and Console User Guides for further details.

1.2.6. Translators

Translator is a User Role available for individuals responsible for translating surveys. Translators access Confirmit Horizons through a dedicated URL for security, and their permissions are strictly limited to viewing and translating assigned surveys.

Refer to the separate Translator User Guide for further details.

1.2.7. System Administrators

The System Administrator is an additional set of permissions that can be enabled for Professional User(s) who have decision-making authority within their company. This user is able to grant permissions to other users, and can access all enabled system features, view and edit company-wide settings, and monitor usage data for the client’s account.

Refer to the separate Administrator Manual for further details.

1.2.8. End Users

End Users are user roles that are allocated by Designated Users, and are for users who access Confirmit Horizons for end user functions such as accessing reports, dashboards and Action Management. End User roles include:

- **Report Viewer Access (RVA)** can access reports and dashboards that have been assigned to them in Reportal and Active Dashboards.
- **Report Analyst Access (RAA)** allows users to analyze existing report data and create tables.
- **Survey Dashboard & Instant Analytics Access** allows for access to Instant Analytics and Survey Dashboard.

Further information on End Users is given in the relevant user guides.

1.3. Security Issues

Use the links below to navigate to information on various issues regarding security.

1.3.1. HTTPS/HTTP

Only sites specifically configured to support HTTPS will be able to do so. On a site supporting HTTPS, users may connect using HTTPS or HTTP.

It is possible to enforce policies where only HTTPS is accepted. This can be set at site and/or company level, the priority being Site, Company, User. Any level can select to use HTTPS, but if a higher level is set to use it then it will be enforced for all lower levels.

SaaS only:
HTTPS is supported on the site. If you want to run surveys using https, simply replace http:// with https:// in the survey link, for example https://survey.confirmit.com/wix/pXXXXXXXX.aspx.
For further details about the security systems that are available, and those that are used in Confirmit, go to https://extranet.confirmit.com/library/security.aspx.

If your company became a user of Horizons after January 31st, 2016, your user account is set up by default with HTTPS enforced for surveys.

When sending emails, the option **Include link > Secure** is available (disabled until you check "Include link"). When this is checked, the URLs that are included in the emails will use https:// instead of http://. If you want the URL in the middle of the mail text, use the primitive ^secureslink^ (equivalent to ^slink^).

When you refer on your survey pages to images from non-secure sites, the respondent will be presented with a warning on every page: "This page contains both secure and non-secure items. Do you want to display the non-secure items?" To avoid this, the images must also be placed on a secure site.

Confirmit has developed the File Library functionality (see File Library on page 157 for more information), where you can store the images that you want to use in your surveys. The File Library allows you to upload, store, view and remove images in a number of web-compatible formats (see Limitations on page 157 for more information).

1.3.2. Object Security

While the previous section deals with Internet security in general, this section deals with security *inside* the Confirmit application.

A survey, a question, a report – these are all *objects* inside Confirmit's powerful object oriented database. For each object, specific permissions can be set up, including *read* and *write* permissions.

When you initiate a new survey (object) inside Confirmit, the survey is by default only visible to you because no one else has read or write permissions. However, you may specify that other users or groups of users should have these permissions.

1.3.3. Password Policy

As part of the continuous effort to ensure that Confirmit complies with the highest standards of security, the following password policy applies for end users (CAPI interviewers, report viewers, Analysts and Designers) and Authoring users (Professional, Standard and Translator).

General:

System messages are provided (with translations to the usual common languages) for these settings. The appropriate error messages will be displayed when users choose passwords that do not comply with the site settings.

Confirmit Horizons provides 'Forgotten Password' functionality. This allows end users to trigger an email so they receive an activation link that opens a page where they can reset their password (see Forgotten Password on page 18 for more information).

All passwords are hashed and are not transmitted in plain text, so passwords will not be available in plain text for any system users. Instead, users will be sent an activation link to open a page where they can choose their own password.

Panelists:

The changes to the password policy for panelists are optional, and users must actively enable the restrictions for Basic and Professional Panels (see The Panel Settings on page 589 for more information). Users may then define custom settings for a panel. Panelist passwords will be hashed, meaning that passwords will not be available in plain text. When panelists use the "Forgot password" feature, they will be sent an activation link which will open a page where they can reset their password.

Warning
The default Panelist password settings pre-set by Confirmit provide minimum security. Remember to enable suitable restrictions to ensure a satisfactory level of security for your panelists.

SaaS users:

The passwords for all areas of Confirmit must satisfy the same minimum requirements for complexity. Wherever passwords can be changed or set within the application, they will be validated against the rules listed below before the change is accepted.

- **Password history** - the user's new password must be different from his/her last **12** passwords.
- **Minimum age** - the user can change their password a maximum of three times in any 24-hour period. Note that the 24-hour time constraint is the default setting; this can be adjusted by the company administrator.
- **Maximum number of login attempts** - after **5** invalid login attempts the account will be locked. The user will then not be allowed to login again until the account is reactivated by the system administrator.
- **Non-alpha-numeric characters** - there is currently no requirement for characters that are not numbers (0..9) or letters (a..z, A..Z).
- **Uppercase characters** - the password must contain a minimum of **1** uppercase letters.
- **Non-alpha characters** - the password must contain a minimum of **1** character that is not a letter (a..z, A..Z).
- **Password length** - the password must have a minimum of **8** characters.
- **Password expiry days** - the password will expire (and the user will have to enter a new password) after **90** days. Note that this will not apply for log-ins to the CAPI console.
- **Password strength** - in addition to a combination of the above settings, a regular expression may be used to enforce an even stricter policy. This is not currently used for SaaS passwords.
- **Password Link Timeout -** the reset password link is valid for **60** minutes.

For Horizons users it is possible to enforce even stricter requirements through certain company settings. For example the administrator can specify that first name, last name and username cannot be used in passwords. Contact Confirmit support if you wish to implement a stricter policy.

On-Premise users:

The following configurable settings will be enforced for all On-Premise users. If the Company Administrator selects to use the settings, users will have to comply with these settings when changing their password:

- **Password history** - the user's new password must be different from his/her last X passwords.
- **Minimum age** - the user will have to wait X hours after changing the password before being allowed to change it again.
- **Maximum number of login attempts** - after X invalid login attempts the account will be locked. The user will not be allowed to login again until the account is reactivated by the system administrator.
- **Non-alpha-numeric characters** - the password must contain a minimum of X characters that are not numbers (0..9) or letters (a..z, A..Z).
- **Uppercase characters** - the password must contain a minimum of X uppercase letters.
- **Non-alpha characters** - the password must contain a minimum of X characters that are not letters (a..z, A..Z).
- **Password length** - the password must have a minimum of X characters.
- **Password expiry days** - the password will expire (and the user will have to enter a new password) after the specified number of days. Note that this will not apply for login to the CAPI console.
- **Password strength** - in addition to a combination of the above settings, a regular expression may be used to enforce an even stricter policy.
- **Password Link Timeout -** the reset password link is valid for X minutes.

For Horizons users, it is possible to enforce even stricter requirements through certain company settings. The server documentation that is provided with the release contains more detail.

1.3.4. 2-Step Verification

Confirmit supports 2-step verification (2-factor authentication). Download an authenticator app such as Authy, Duo, Google Authenticator, LastPass Authenticator or Microsoft Authenticator, into your mobile device to generate the required code (see Using 2-Step Verification on page 137 for more information).

1.3.5. Data Transfer Encryption and FTP

Note: Data Transfer Encryption and FTP are chargeable add-ons. If you do not have the add-ons, you will not have access to the menus and functionality.

Data transfer encryption enables you to transfer data to and from Confirmit with no risk to security. The functionality is designed specifically with respect to data and report exports, and respondent uploading and export. The following data transfer tasks support this feature:

- All the data export types
- Data Import for "Pick up files from server" option
- Report exports
- Respondent uploading
- Respondent export

If your company has licensed the add-ons, an administrator setting makes it possible to force every Confirmit user within your company to use encryption and the FTP server during data transfer. Encryption is then handled automatically on respondent upload. The encrypted files can be either ordered by email (see Handling Respondents in Limited Surveys on page 540 for more information), or sent to the Confirmit FTP server or an external FTP server for downloading (see Data Transfer on page 795 for more information). The users will then have to decrypt the files using their private PGP encryption keys.

Note: PGP enforcement does not apply to end user downloads - the export data permission allows unencrypted downloads to end users.

When downloading files from the Confirmit FTP server or an external FTP server, if your company has licensed the Encryption add-on and the file you are downloading has the file extension *.pgp, the system will treat it as being encrypted and automatically decrypt it (see Respondent Uploading with Access to Data Transfer Encryption and FTP on page 546 for more information).

The encryption algorithm used by Confirmit's public and private encryption keys is AES-128, i.e. 128 bit. Public/private encryption keys generated by our customers and used when ordering exports from Confirmit, may use another algorithm.

Before starting to use PGP, check with Confirmit Support that the user has been correctly set up with your public PGP key used for encrypted file transfers from Confirmit. Follow the procedure below to import PGP encrypted data in Confirmit using Data import:

1. Encrypt your file using Confirmit's public PGP key found in **Home > Help > Public PGP Key**.
2. Import the file to Confirmit using Confirmit Data Import (go to Imports for more information).

You can also upload PGP-encrypted data using FTP:

1. Encrypt your file using Confirmit's public PGP key found in **Home > Help > Public PGP Key**.
2. Upload the file to your FTP upload area in Confirmit using FTP in binary mode.
3. Import the file to Confirmit using Confirmit Respondent Upload (see Respondent Uploading with Access to Data Transfer Encryption and FTP on page 546 for more information).

Note: Your user key is available in the User Settings overlay (click your user name in the upper-right corner of the Authoring window).

1.3.5.1. The FTP Server - Additional Information

Note: The FTP functionality is a chargeable add-on. If your company has not licensed the add-on, you will not have access to the functionality.
This functionality allows access to external FTP sites. If an external site is to be used, additional file information and a password will be required.

FTP is a good option to use when transferring large volumes of data, since very large files can not be uploaded in the browser. Note also that picking up files from the FTP site can allow the automation of data flows, as you can set up the system to pick up files automatically at preset times. Recurring tasks can also be set up, enabling files to be updated at regular intervals.

As a user, when you access the FTP site using the user name and password supplied to you by Confirmit, you will only have access to your company's area. This will be divided into two main folders;

1. **Download**, which contains any files that have been downloaded to the FTP site by you or other users within your company.
2. **Upload**, which is for any files that are to be available for you or other users in your company to upload to Confirmit.

Each of these two main folders will be sub-divided into ProjectsData and RulesData. These folders will be further sub-divided into folders for each survey and each rule respectively, to keep the area tidy and to simplify the search and location of the files you need. The ProjectsData folders are for files used for survey data export and import, and the sub-folders within these folders are named with the Survey ID numbers (found on the **Home > Survey List** or the surveys' Overview page). The RulesData folders are for files used by data processing and panel management rules. These folders are named according to the rules to which the files apply.

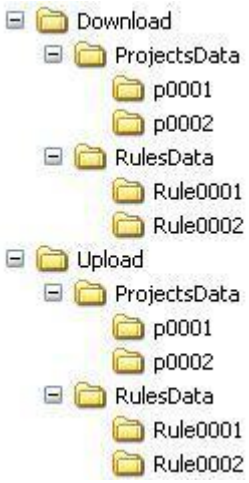


Figure 1 Example of the FTP folder structure

The survey and rule sub-folders will be created automatically as required when files are downloaded to the FTP site from Confirmit. If a file is to be uploaded to Confirmit first (before it has been downloaded to the FTP site from Confirmit), then you will need to create the folder tree manually so that the file can be saved in the appropriate location so it will be found by the Upload task.

Note that if you wish to download files to the FTP site and then upload them to for example a different survey, you will need to access the FTP site and "manually" move the files from the Download folder to the Upload folder.

If your company has licensed the FTP add-on, then in several places within Confirmit you will have the option of downloading files to FTP or uploading files from it. For example FTP will be available in data import, data export, and in data processing rules both for Authoring (refer to the Data Processing documentation) and Professional Panels (refer to the Professional Panels documentation). Below is an example of a Data Import page, where the Pick up from FTP Location is selected.

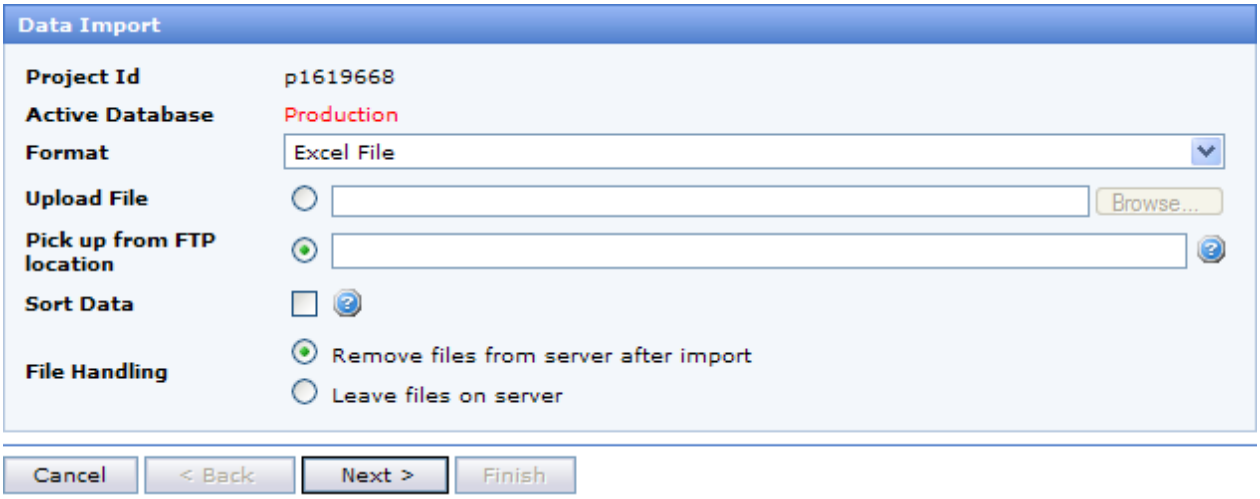


Figure 2 A Data Import page showing the Pickup From FTP Location and File Handling options

The Confirmit FTP address to be used by your company is specified as part of the setup and enabling procedure, and it cannot be changed by the user. All your FTP activity within Confirmit will therefore be directed automatically to the Confirmit FTP site. This means that you only ever need to specify the file name of the file you are interested in; a path is not required. If you wish to upload several files simultaneously, for example in connection with a survey incorporating loops, then these files must be zipped such that only one .zip file is uploaded.

When you select the Pick up from FTP Location option the File Handling options become available. These allow you to decide what to do with the original file on the FTP site; you can leave it there for later use, or delete it after it is uploaded.

When creating rules to upload files for data processing or Professional Panels, the file does not necessarily have to exist in the FTP location at the time the rule is created. If the file does not exist, you will still be able to save the rule but a message will be displayed informing you that the file cannot be found. You will then need to ensure the file is placed into the appropriate folder in the FTP location before the rule can be run successfully.

1.3.6. Personal Identifiable Information (PII)

The General Data Protection Regulation (GDPR) comes into effect on 25th May 2018. The overall purpose of the GDPR is to protect the personal data collected from within the European Economic Area (EEA), in a consistent way across the EEA countries. The GDPR provides data subjects with rights in relation to personal data they have shared with businesses and organizations that collect, store, and process such personal data. Further details are available from https://www.confirmit.com/legal.

To assist you with data security and GDPR compliance, you can remove personal data (PII), for example names and email addresses, from surveys. Using Personal Data Cleaning (see Cleaning of Personal Data on page 828 for more information), you can anonymize the data once the personal details are no longer needed and thereby "break the link" between the data and the person providing it. You can also set a date for the survey on which the databases will be deleted (see The General Tab Fields on page 175 for more information).

Warning
This action is irreversible!

1.3.7. Respondent Security and Anonymity

Web surveys can be set up to run as **public surveys**, in which anyone who tries to access the web interview page may participate.

Confirmit also supports **limited surveys**, in which only specially invited respondents are able to log on to the survey. In these surveys, a set of respondent background data may be merged with the response data to produce the final data file. It is the responsibility of the survey administrator to make sure that this information is not misused in any way (see Personal Identifiable Information (PII) on page 9 for more information). In theory, the merge may take place without the respondent's knowledge. The advantage of merging is that it allows you to produce *respondent specific questionnaires*. For example, a web panelist does not have to enter information about age or gender because this information already exists in his or her profile.

1.3.8. Backup of Meta Data

SaaS only:
"Meta Data" is all the data of a survey that is not response data. Every night, a back up copy of all meta data is saved to an external media and stored in a safe. The data is archived in a safe place, and may be restored should a system crash occur.

For server installations, your company must set up its own routines for backup.

1.3.9. Backup of Response Data

SaaS only:
The MS SQL server periodically runs full backup of all response data in the database. In most cases it is possible to restore most of the data from a recent backup. In the case of a system failure, external media backups of response data also exist.

It is possible to delete response data from the web application. You are always asked twice before doing this (“Are you 100% sure?”), but it *has* happened that a Confirmit user has accidentally deleted a running survey’s response data. It is the responsibility of the Confirmit user to make sure that this does not happen.

For server installations, your company must set up its own routines for backup.

1.3.10. Integration with Google Analytics

Confirmit can make use of Google Analytics, a web analytical service provided by Google, Inc. (“Google”), to provide a tracking facility for Confirmit activity. Confirmit server page traffic is tracked for our own use-analysis (set at system configuration), and customer (your) survey page traffic can be tracked to enable you to analyze the use and effectiveness of your surveys (set at the Company Account page).

Google Analytics uses “cookies” (see Cookies in Confirmit on page 10 for more information), which are text files placed on the respondent's computer, to help the user (Confirmit or you the customer) analyze how users use the site. The information generated by the cookie about the use of the website (including the user's IP address) will be transmitted to and stored by Google on servers in the United States. Google will use this information for the purpose of evaluating use of the pages served, compiling reports on activity for website operators, and providing other services relating to activity and Internet usage. Google may also transfer this information to third parties when required to do so by law, or when such third parties process the information on Google's behalf. Google will not associate the respondent's IP address with any other data held by Google. The respondent may refuse the use of cookies by selecting the appropriate settings on their browser, however it must be understood that if they do this some functionality may be restricted.

By using the Confirmit system or by enabling Google Analytics tracking for your company, you consent to the processing of data about you by Google in the manner and for the purposes set out above.

Note that if your company wishes to make use of the Google Analytics facility, your company must create its own Google Analytics Account. Once the account exists, enabling this feature will result in an asynchronous JavaScript code fragment being embedded on all pages of surveys launched within your company, all Panel Portal pages and all published Reportal reports. Then, activating the account will cause data to be sent to Google, Inc. (“Google”). Enabling Google Analytics should not lead to any deterioration in performance or decreased user experience.

The addition or removal of Google Analytics code will only take effect after surveys are launched or re-launched, and portals and reports are published.

Google is outside of CONFIRMIT’s control, and CONFIRMIT explicitly disclaims any warranty of this feature. CONFIRMIT will provide support for this feature at CONFIRMIT’s discretion only.

1.3.11. Cookies in Confirmit

A cookie is a small file downloaded on to a device (such as a PC or a mobile device) when the user accesses certain websites. Cookies are then sent back to the originating website on each subsequent visit. Cookies are used on the Confirmit Horizons SaaS environment to provide you with a better user experience. Confirmit Horizons does not collect or store personal data via cookies. Cookies (if any) used when you visit pages delivered by Confirmit Horizons have a low level of privacy intrusiveness.

The Confirmit Cookie Policy is provided in response to the requirements of the “Privacy and Electronic Communications (EC Directive) Regulations 2011”, referred to herein as the “Regulations”. For more information about the Regulations as implemented in the UK, visit http://www.ico.gov.uk/.

The Confirmit Cookie Policy document contains information about the cookies that may be used when you or your respondents access the Confirmit Software as a Service (SaaS) environment for the purpose of designing surveys or reports or responding to a survey or viewing a report.

The use of cookies and similar technologies has for some time been commonplace and cookies in particular are important in the provision of many online services. Using such technologies is not prohibited by the Regulations, but the Regulations requires that people are told about cookies and given the choice as to which of their online activities are monitored in this way.

You can, should you choose to do so, disable the cookies from your browser and delete all cookies currently stored on your computer. You can find out how to do this for your particular browser by clicking **Help** on your browser's menu. Note however that should you choose to disable cookies from your browser it may prevent you from taking full advantage of the SaaS service, and some functionality may fail to work.

For further details on the cookies that may be used by Confirmit Horizons, go to the Cookie Policy page on the Confirmit website at http://www.confirmit.com/Home/cookie-policy.aspx, or click the link on the Confirmit Horizons login page.

1.4. System Requirements

The system requirements and prerequisites are given in the System Requirements document that you can download from the Confirmit extranet at https://extranet.confirmit.com/.

1.4.1. Browser Settings

Important
The browser manufacturers' interpretations of web standards may vary, and this can result in slight differences across the different browsers. Confirmit therefore recommends that users test their surveys, Panel Portal surveys, and Reportal Viewer/Public Reports, on different browsers to ensure they look and function as expected/required on the different browsers.

The browser requirements for Confirmit v2020 are as follows.

Confirmit Horizons is designed for use with a 1024 x 768 screen resolution at 100% browser zoom with the quick-launch bar collapsed. If your system is set to a lower resolution or a different zoom level, this may prevent Horizons being used. If a Mac is to be used, it must have the right-click functionality available.

To allow your Internet Explorer browser to work optimally towards the Confirmit software, we strongly advise you to do the following:

- Allow for new versions of pages to be checked automatically.
    - Go to **Tools > Internet Options > General > Settings > Temporary Internet Files**.
    - In the "Check for newer versions of stored pages" list in the upper part of the dialog, select **Automatically**.
- Check the size of the Temporary Internet Files Folder (TIFF). If you allow the cache size to be too large, this will have an adverse effect on how Internet Explorer performs the automatic check in the first point.
    - If you are not already there (see above), go to **Tools > Internet Options > General > Settings > Temporary Internet Files**.
    - The default setting is 250MB; this should be enough. If it is currently much higher then you can reduce the size to around the default.
- Add the Horizons Authoring URL(s) to the Internet Explorer Trusted Sites.
    - Go to **Tools > Internet Options > Security** and in the Select a zone... area click the **Trusted sites** icon. This activates the **Sites** button; click this button to open the Trusted sites dialog.
    - Add the following two URLs: **author.confirmit.com** and **author.euro.confirmit.com** (type the addresses then click **Add**).
    - If you select not to include Horizons Authoring in your Trusted Sites, you must disable pop-up blocking for these sites under **Tools > Internet Options > Privacy > Pop-up Blocker > Settings**.

Note: When using CATI and/or CAPI installations on Windows 8, the appropriate author.confirmit.com and/or author.euro.confirmit.com URLs must be made Trusted Sites.

- Allow client cookies and session cookies from the Confirmit sites (if your browser does not accept cookies, you will not be able to log on).
    - Go to **Tools > Internet Options > Privacy > Sites**.
    - Add the following two URLs: **author.confirmit.com**, **author.euro.confirmit.com** (type the addresses then click **Allow**).
    - Alternatively, set the general cookie setting to **"Medium-High"** (a lower setting is not recommended.)

When Confirmit Horizons is updated, excessive or old versions of temporary Internet files can cause problems. Therefore the first time you start Horizons after a new version of the program has been released, you should clear the cache of all the old temporary Internet files.

- Go to **Tools > Internet Options > General**.

- In the Browsing history section, click the **Delete** button.

Note: The system-generated error messages that are presented to respondents are translated into English, Norwegian, Swedish, German, French, Spanish, Finnish, Danish, Italian, Dutch, Portuguese, Japanese, Chinese Simplified, Chinese Traditional, Korean, Arabic, Russian and Hebrew. For other languages, the error messages will be defaulted into the main category (for example: Venezuelan Spanish into Spanish). If a language is not available, the error messages will be displayed in English, which is the overall default language.

When projects are migrated from one server to another, for example if a user is changing from an On-Premise installation to SaaS, custom error messages for languages that are not covered in Horizons standard list will not be included in the migration and will have to be moved "manually".

1.4.2. Respondent Requirements

The Confirmit survey engine has been designed to comply with HTML standards so that surveys will function as intended in as many browsers as possible. Users should note however that features added to surveys, for example client side scripts, media playing, the use of certain cascading stylesheet properties etc. might alter the default requirements. These are:

- Operating system - any.
- Web browser - any browser supporting HTML 4.01/XHTML and CSS.
- Advanced WI and Dynamic Questions features (optional) - IE 8+. Firefox 10+. Safari (Mac only) 5.1+. Chrome 26+.

Some problems have been reported in which early versions of AOL (4) have corrupted the links in survey invitations sent as HTML email from Confirmit. In addition, Netscape 4.x browsers have limited support for CSS (Cascading Style Sheets) and might show pages differently than Internet Explorer. In addition, Netscape 4.x also has limited support for Unicode languages.

End Users accessing Pivot Views will need Flash 5.0 installed.

Note: "Advanced WI features" such as sliders, autosums etc. (see The Advanced WI Features Tab on page 258 for more information) are supported in IE8+ (Windows), Firefox 2.0+, Chrome 1.0+, and Safari 3.1+ on Windows and Mac. Respondents using other browsers will see the standard Confirmit survey interface, with "normal" radio buttons, with the exception of Searchable Multi questions, which have no fallback.

Note: "Dynamic Questions" (see Dynamic Questions on page 464 for more information) is supported in IE8+ (Windows), Firefox 2.0+, Chrome 1.0+, and Safari 2+ (also for Mac). This functionality is only available in surveys using "Survey Layouts" (see Survey Layouts on page 65 for more information). If Survey Layouts is not used, then the page layout will be static and the questions will appear on the same page. However as the logic is only evaluated when the page is submitted (when the respondent clicks the Forward button), an error message may result if for example one of the initially hidden questions is missing a response. There is therefore no fall-back for Dynamic Questions. However the DynamicQuestionsEnabled() function described in the Confirmit Scripting manual can be used to either screen or create an optional routing for respondents who do not have the required browser.

1.4.2.1. Respondents using AOL

Note that AOL has its own interpretation of how to display links and HTML code. The following AOL browsers/e-mail programs have been tested by Confirmit:

AOL 4, 6, 8, and AOL webmail on a Windows 2000 platform.

E-mail invitations were sent to all these versions as both plain text and HTML formatted. The test results are as follows:

- HTML formatted links do not work on AOL 4. The links are corrupted. A single quote is inserted before and after the link.
- HTML formatted links are clickable in AOL 6 and up (AOL 5 has been not tested).
- Links sent in plain text are not clickable in any client version of AOL.

- Plain text and HTML formatted mail is displayed correctly when viewed using the HTML webmail portal on AOL's website.

Note: These are known issues with AOL browsers, and are solely due to the AOL browsers' interpretation of links and HTML code.

Our proposed instructions for an AOL user are as follows:

Send the emails as HTML format. Most AOL users have probably upgraded to 6 or better, but include the following instructions for pre-6 client users:

- If you experience problems when clicking on the link provided, access the survey as follows: Copy the link and paste it into your AOL address bar, then press the [**Enter**] key on your keyboard or click [**Go**] on the address bar.

1.4.3. 3rd Party Software Components

Confirmit products use a number of 3rd-party components in the software. For attribution details refer to the Professional Authoring **Home > Help > 3rd Party Software** menu item, or the separate **3rd Party Software Components used in Confirmit Software** document that you can download from the Confirmit extranet at https://extranet.confirmit.com.

2. Starting Horizons – a General Overview

2.1. Logging into Confirmit Horizons

A valid username and password are required to log into Horizons. Once you are logged in, a "user object" controls your access to any other object in the application.

Important
You can log in to Confirmit Horizons via a number of different Internet browsers (see Browser Settings on page 11 for more information), and the browser manufacturers' interpretations of web standards may vary. This can result in slight differences across the different browsers. Confirmit therefore recommends that users test their surveys, Panel Portal surveys, and Reportal Viewer/Public Reports, on different browsers to ensure they look and function as expected/required on the different browsers.

Users log in to Confirmit from the URLs below:

- USA site: https://author.confirmit.com
- Euro site: https://author.euro.confirmit.com
- Australian site: https://idp.confirmit.com.au

SaaS only:
You can log in to Confirmit by clicking the appropriate link on the Confirmit home page, https://www.confirmit.com/.

When you access the link or the URL, the Confirmit login page opens. Here you type in your user name and password, and click **Sign in**. If your browser does not meet the browser requirements (see Browser Settings on page 11 for more information), an error message will be displayed.

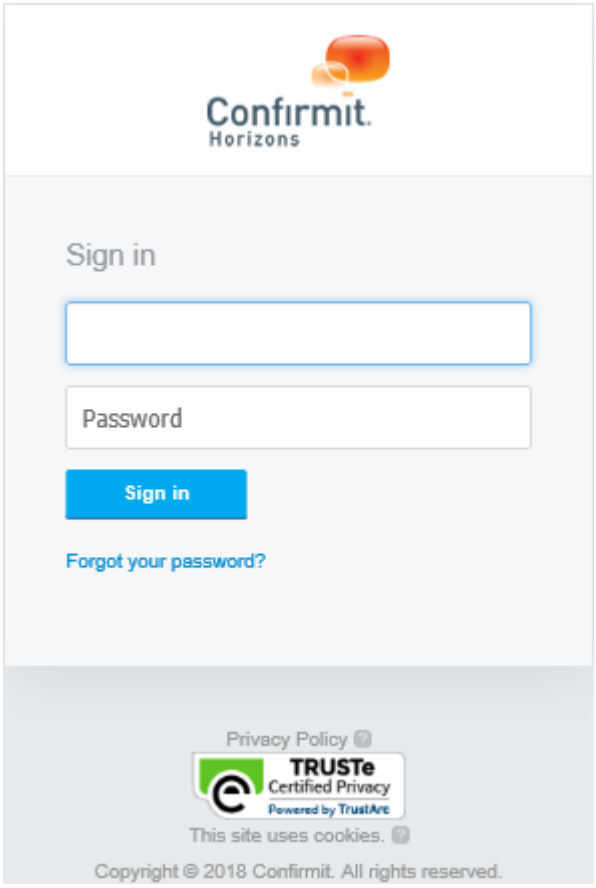


Figure 3 The Confirmit Login window

- If you are a new user entering Confirmit for the first time, you will have been given a "startup password" by your administrator. The first time you log in you will be prompted to change that password to one known only to yourself. Before your password is accepted it will be checked to ensure it meets the preset complexity requirements (see Password Policy on page 5 for more information).
- If 2-step verification is enabled for your account, input the required 6-digit code (see Using 2-Step Verification on page 137 for more information).

Important
If someone attempts to access the login page with an incorrect username and/or password, the number of attempts made is counted. When the counter reaches a preset limit (see Password Policy on page 5 for more information), Confirmit will lock for that user and a message will be displayed telling the user that they must contact their administrator to be given access. The user will not be able to log in again until the account is reopened. An email will also be sent to the user's registered email address informing them that they can use the Forgotten Password functionality to reopen their account.

Note: If you forget your password you can click the link below the login page (see Forgotten Password on page 18 for more information).

For On-Premise customers, the Confirmit system administrator can set the permitted number of attempts in the registry settings. The default number of attempts is 3.

When there are 30 or fewer days remaining to the license expiry date, a warning message will be displayed when the user logs in.

When Professional users log into Confirmit Professional Authoring, the home page opens as shown in the example below.

Initially, by default, only the Confirmit author who has created a survey has access to any information about that survey. This means that other authors will not know that a survey even exists unless they are explicitly given access to the survey by its creator. So when you log in, only the surveys that you have created or have been given access to will be listed. However your company administrator will have access to every survey created by authors in your company. So if you need access to a survey that's been created by someone else, and that person is not available, the easiest and quickest route will be to ask your company administrator to give you access.

In most cases the Confirmit Support team can also give access to surveys to "other" users if necessary. However Support must first have permission from the client company to do this as the company will probably have internal regulations governing access.

A Confirmit survey has a range of access permissions, from none to full administrative control of the survey. Refer to the Confirmit Administrator Manual for further details.

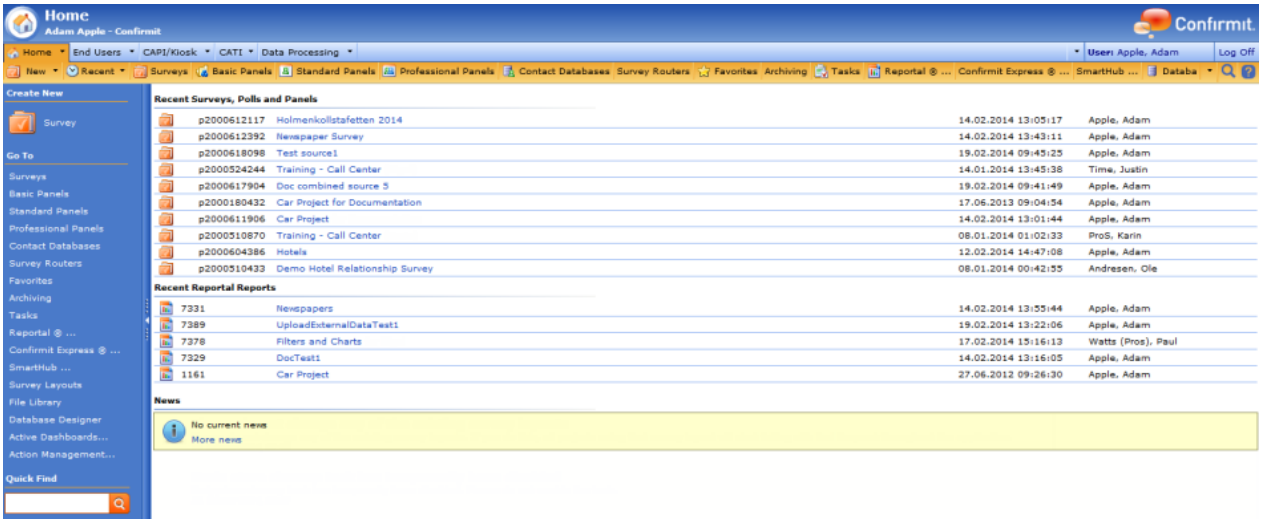


Figure 4 Example of a Professional user's Home page after logging in

Standard users will be presented with a simplified home page with a reduced menu system.

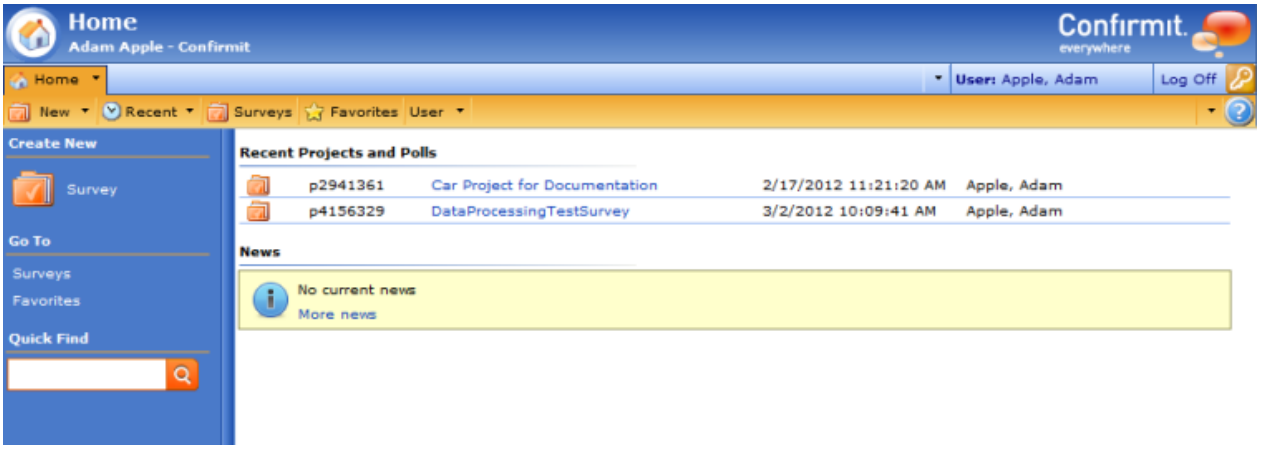


Figure 5 Example of a Standard user's home page after logging in

This user guide describes the functionality in the Professional user interface.

2.2. The Homepage

The Homepage is common to the majority of Confirmit's applications. In most applications this page opens on initial log-in, however in Professional Authoring you can open the page using the **Horizons Home** link in the Quick access column.

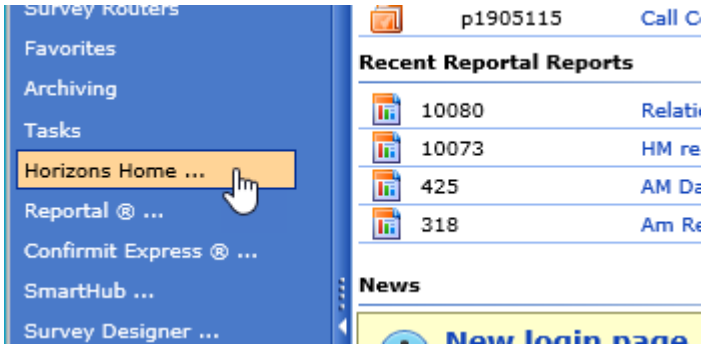


Figure 6 The Horizons Home link in the Quick access column

The Homepage provides access to all the Confirmit applications that you are licensed to use - click the appropriate icon to go to that application. Note that if you are not licensed to use an application, its icon will not be displayed in the page.

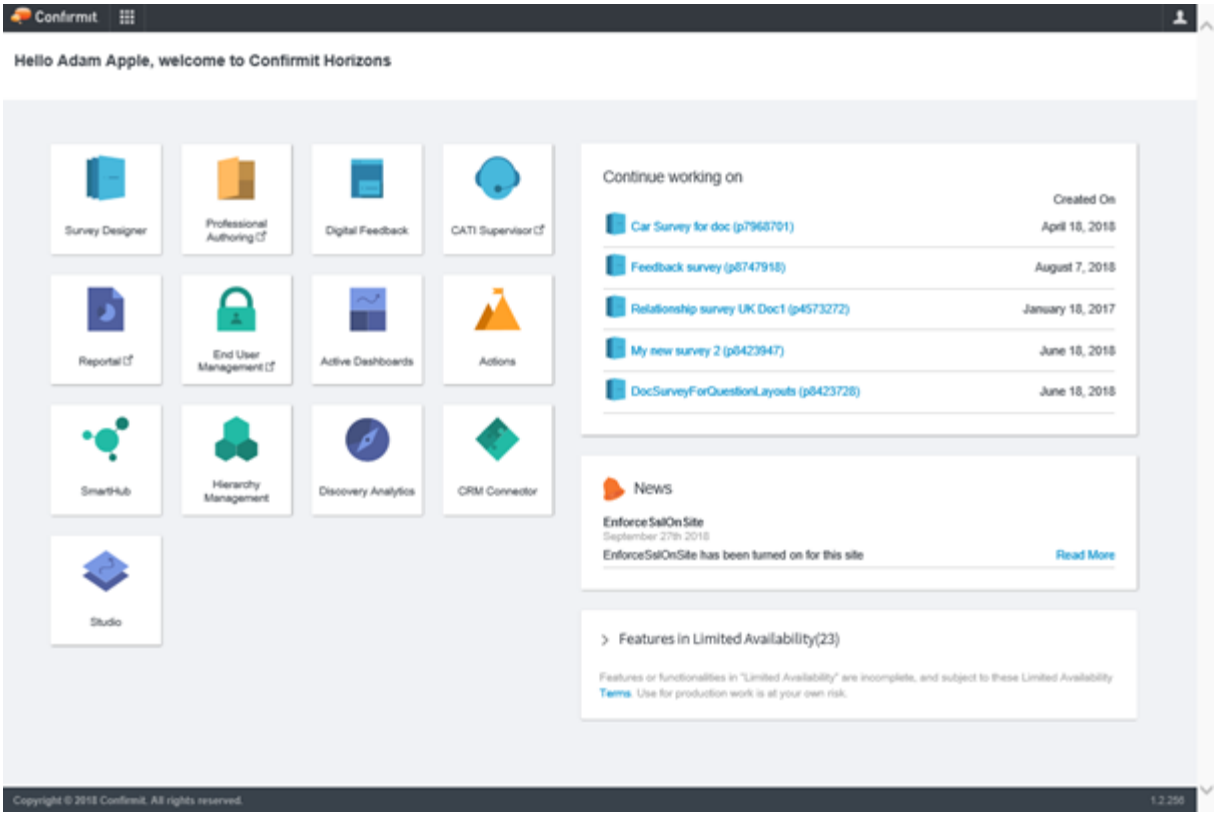


Figure 7 Example of the Homepage

Note: Applications that do not yet have a waffle icon have beside the application name. These applications will open in a new window, allowing this Homepage to remain open while you are working in the selected application.

Towards the right side of the Homepage is a list of projects you have recently been working on. In the event you wish to work with one of those projects, this list provides easy access. Click on a project to open it.

Below the recently used list is a list of news items. These news items provide information on the latest changes, and other features and functionality that have recently become available.

Towards the bottom of the page is a list of the functionality currently accessible under "Limited availability". These items are still undergoing development, but are made available for testing purposes if your company has agreed to trial them. Please note that use of this new functionality for production work is at your own risk.

2.3. Forgotten Password

Your Confirmit password is what prevents unauthorized people from using your Confirmit account and interfering with your surveys. You must therefore ensure your password is difficult to guess and is known only to you. This of course can create problems - if you should forget your password then you will not be able to use Confirmit. The Confirmit login page therefore includes the possibility for you to reset your password should you forget it. To do so:

1. Click the **Forgot your password?** link below the login page.

   The dialog shown below opens.

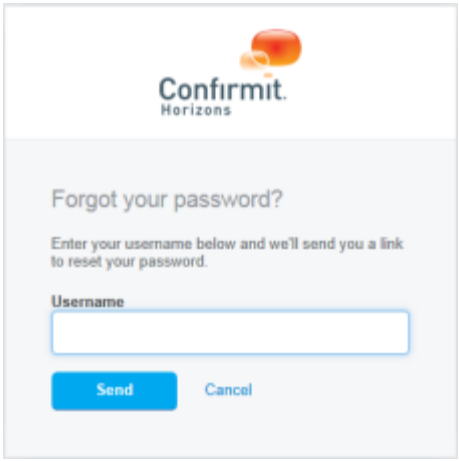


Figure 8 The "Forgot your password?" dialog

2. Type your user name into the field and click **Send**.

   An email is sent automatically to the address registered to the username you have given. The email contains a link and instructions for how you can reset your password. Note that the system is automated and "internal" to Horizons so is identical for SaaS and On-premise users.

Note: The reset password link is time-limited and is only valid for one hour. If you do not reset your password within that time then the link will expire and you must repeat the procedure to be sent a new link.

Note: When you change your password, the new password is checked against the pwned password service of haveibeenpwned.com to see if the password is one that is known to have been breached before. If your new password has been registered in previous data breaches more than a specified number of times, then it will not be accepted. The maximum number of breaches allowed is set by the system administrator - refer to the Confirmit Horizons Administrator Manual for further details.

2.4. The Timeout Overlay

Whenever a Confirmit author (not a respondent) logs on to the application, a new session object is created on the server. This object holds information about the author's state (current survey, etc), and the Web server allocates memory for this state information. By maintaining this information as you move from page to page within Confirmit, the individual requests to the server are kept small and simple. However, the Web server does not want to keep track of this information when you exit the Web application, and it is possible to exit the application without explicitly sending a 'log off' command to the Web server.

Therefore for security reasons, if the time between author-requests exceeds 60 minutes (perhaps you have gone to a meeting and left Confirmit running), an automatic time-out occurs. At this stage the login overlay is displayed on your monitor in front of the Confirmit window. If you now re-enter your password (your username will be remembered), you can continue the session where you left off.

However once the login overlay time-out is reached (after a further 180 minutes), Confirmit assumes you have logged off and frees the memory holding the state information. This is then lost, so if you log back in after the time-out you will be redirected to the first page of the Web application.

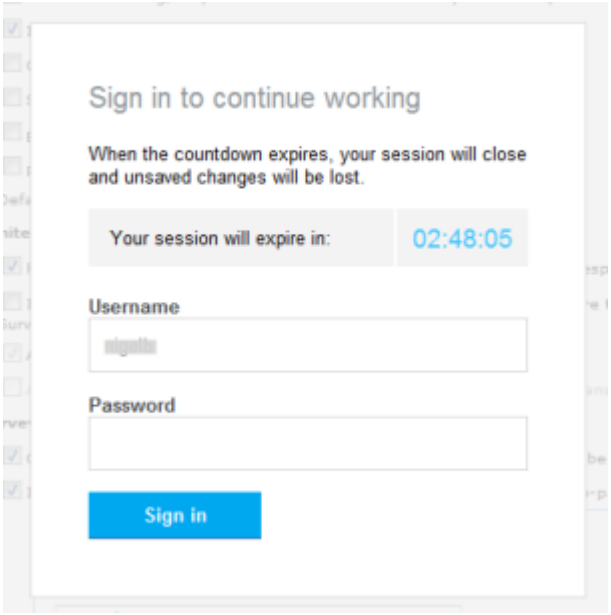


Figure 9 The login overlay that is displayed when a Confirmit session has timed-out due to inactivity

Note: If you have made some changes in your survey and the login overlay appears before you have the chance to save them, then all is not lost. If you log again in before you are locked out, Confirmit will reopen at the page you were last in and will remember the changes, allowing you to continue where you left off (and save your changes at your earliest opportunity!).

2.5. The Survey Search Facility

The Survey Search functionality uses a Lucene™ full-text search engine that allows you to search for projects and nodes in projects that contain specific words. Once you have added the search criteria, the search is conducted through all surveys to which you have access, and a list of the "hits" is presented.

Click the **Search** icon that is located in the upper-right corners of the Home window and the Survey List window. The filter panel opens.

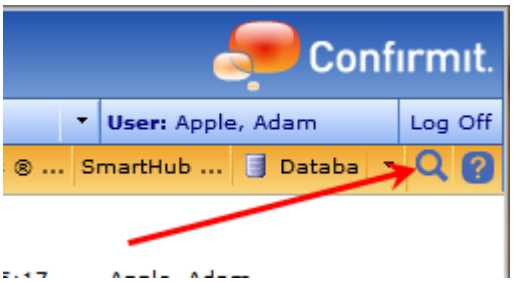


Figure 10 The survey Search icon

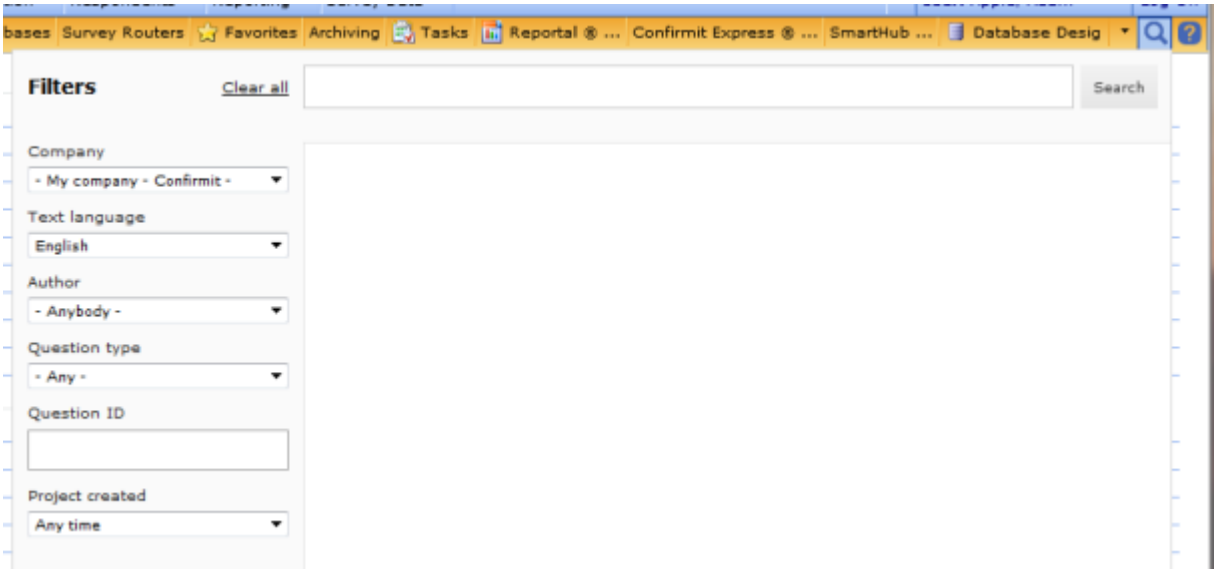


Figure 11 The filter panel

Type into the text field the question or node id or specific words that you know are included somewhere in the question or node that you are looking for. This could be for example an answer option, a word in the question text etc. you can use Boolean operators, wildcards, fuzzy and proximity searches - see below. Type in or select from drop-down lists any other search criteria to assist you with finding the survey you are looking for, then click the **Search** button to open a list of the surveys to which you have access, that contain the specified question, text etc..

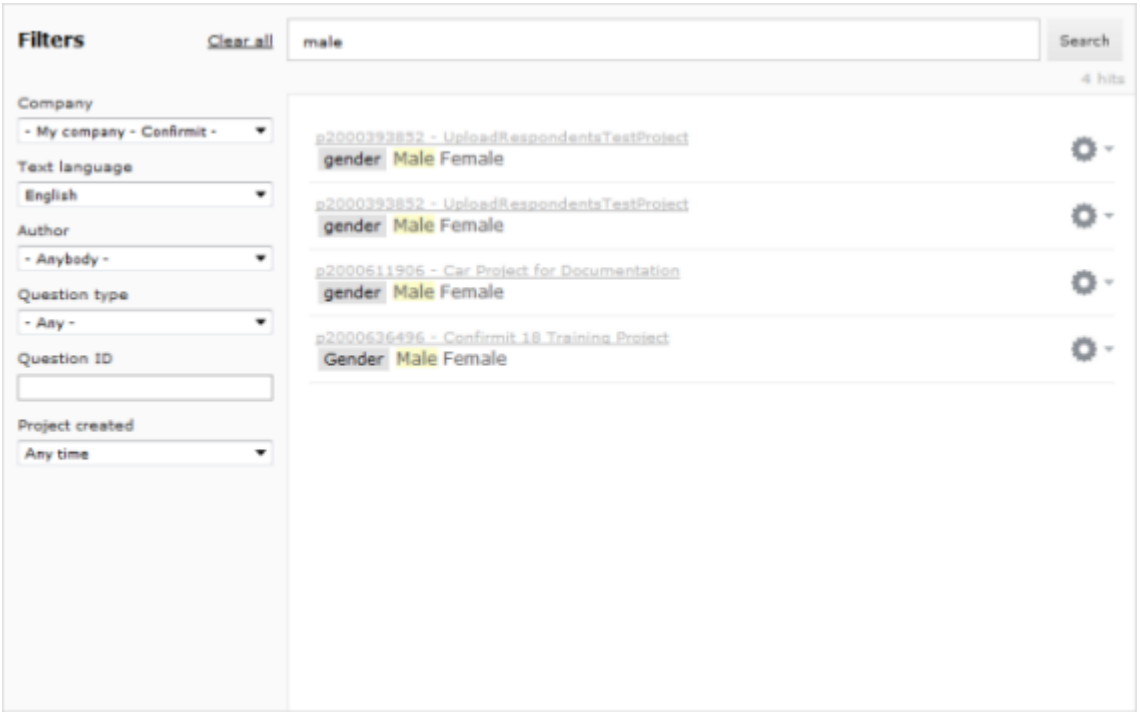


Figure 12 Example of a hit list resulting from a search

Boolean operators

You can refine the search by adding Boolean operators to the search field. The operators supported are **and**, **or**, **not**, **+** and **-**, and you type these between the words you are looking for. For example typing **gender and please** will find all nodes with both the words **gender** and **please** somewhere in the node. The **or** operator is the default conjunction operator. This means that if there is no Boolean operator between two terms, the **or** operator is used. The **or** operator links two terms and finds a matching survey if either of the terms exist. The symbol **||** can be used in place of the word **or**.

Wildcard searches

You can perform single and multiple character wildcard searches within single terms. To perform a single character wildcard search use the **?** symbol. The single character wildcard search looks for terms that match that with the single character replaced. For example, to search for **text** or **test** you can use the search **te?t**. To perform a multiple character wildcard search use the ***** symbol. Multiple character wildcard searches look for 0 or more characters. For example, to search for **test**, **tests** or **tester**, you can use the search **test***. You can also use the wildcard searches in the middle of a term, such as **te*t**.

Note that you cannot use a ***** or **?** character as the first character in the text field.

Fuzzy searches

You can perform "fuzzy" searches based on the Levenshtein Distance, or Edit Distance algorithm. To do a fuzzy search use the tilde, "**~**", symbol at the end of a Single word term. For example to search for a term similar in spelling to **roam** use the fuzzy search **roam~**. This will find terms like **foam** and **roams**.

Proximity Searches

You can find words that are within a specific distance away from each other. To conduct a proximity search use the tilde, "**~**", symbol at the end of a phrase. For example to search for instances where **near** and **far** are within 10 words of each other in a survey, use the search term **near far~10**.

Hit list tools and options

Each hit in the list has a number of options available depending on the type of hit:

- Click the survey ID link for a hit to open the Survey Management page for that survey.
- Click on the highlighted text in a hit to open a drop-down menu:
    - **Preview -** opens the preview page for that node.
    - **Add this question... -** if you have a survey open, this option copies the question into the current survey.
    - **Edit node -** opens the survey that the question is in, and opens the Question Details page for that node.
- Click the Activities icon for a hit to open a drop-down menu with items relevant to the type of hit (survey or node):
    - **Edit survey -** opens the survey that the question is in, at the Survey Designer page.
    - **Survey management -** opens the survey that the question is in, at the Survey Overview page.
    - **Duplicate survey -** creates a duplicate of the survey that the question is in, and opens the new survey at the Survey Overview page.
    - **Preview -** opens the preview page for that node.
    - **Set as secondary project -** if you have a survey open then this adds the survey in the hit list to the currently open survey as a secondary project.
    - **Edit node -** opens the survey that the question is in, and opens the Question Details page for that node.

Note: This search facility does not find archived surveys **(see Archiving on page 51 for more information).**

Click the **Search** icon again to close the filter panel.

2.6. Confirmit Learning Academy

Our training courses will help you get started on your Confirmit software, and will enable you to get the most out of the products. Whether you choose instructor-led training (in our office or yours), a recorded webinar, or self-paced e-learning, you can rest assured that you're getting the latest and greatest information.

Instructor-Led Courses

- **Public Courses -** instructor-led classes are held regularly in our offices (London, New York City, Oslo, or San Francisco). An experienced Confirmit trainer will guide you through a series of hands-on exercises designed to ensure you get the most from your Confirmit software.
- **Private Courses -** you can have an experienced Confirmit instructor conduct training at your site on a date that's convenient for you. Private courses can be tailored to meet your specific needs.

E-Learning Courses

- **Self-Paced, Interactive Courses -** our e-learning courses offer convenience and flexibility from the comfort of your own office or home. Browse the course catalog and choose the web-based interactive course that meets your needs, and learn at your own pace.
- **Recorded Webinars -** if you have a few minutes to learn what's new, watch and listen as Confirmit product experts deliver updates on new product functionality. You can pause the webinar and return where you left off.

Type or copy the URL below into your browser to see what's available.

https://www.confirmit.com/Resources/Training-Academy/#e-learning-courses

Note: Instructor-led courses and the e-learning training courses on the Confirmit Learning Management System (LMS) are chargeable. Contact your Confirmit account manager for further details.

2.7. Getting Help

Confirmit contains a built-in context-sensitive on-line help system to provide you with assistance should you require it. Click the **?** button, located in the upper right corner of most of the windows, to open the help page for that window. Most of the pages contain links to additional information and related topics – click the links to go to those pages. Use the **Back** and **Forward** buttons to navigate through previously opened pages.

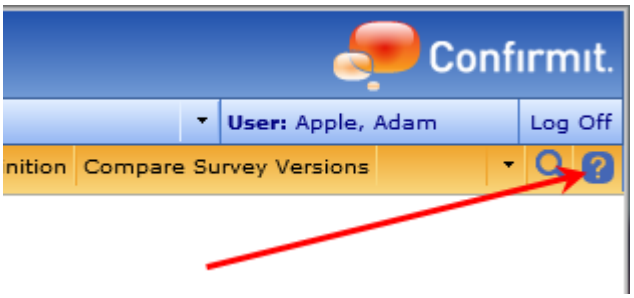


Figure 13 The User Assistance button

Many of the properties in the various property sheets also have help texts associated with them. Click the **?** button beside a property to view additional information about that particular property.

Remember that you can also download the latest revisions of all the Confirmit User Guides in .CHM and .PDF formats from the Confirmit Extranet at https://extranet.confirmit.com. You will need to log in to the extranet, then you can filter the list and search for the documents you need.

If you are experiencing problems achieving the results you want, or you have any other support-related issues such as questions concerning specific functionality, please contact the Confirmit Support team at support@confirmit.com.

3. Working in Authoring

Most operations in Authoring are performed by drag-and-drop, right-clicking and selecting from the menu, or by accessing editors by double-clicking on an item. The following sections describe the main components that are used throughout Authoring.

3.1. Frames and Panes

When working in a questionnaire, the Confirmit screen can be divided into four frames. Three of these can be opened and closed as required.

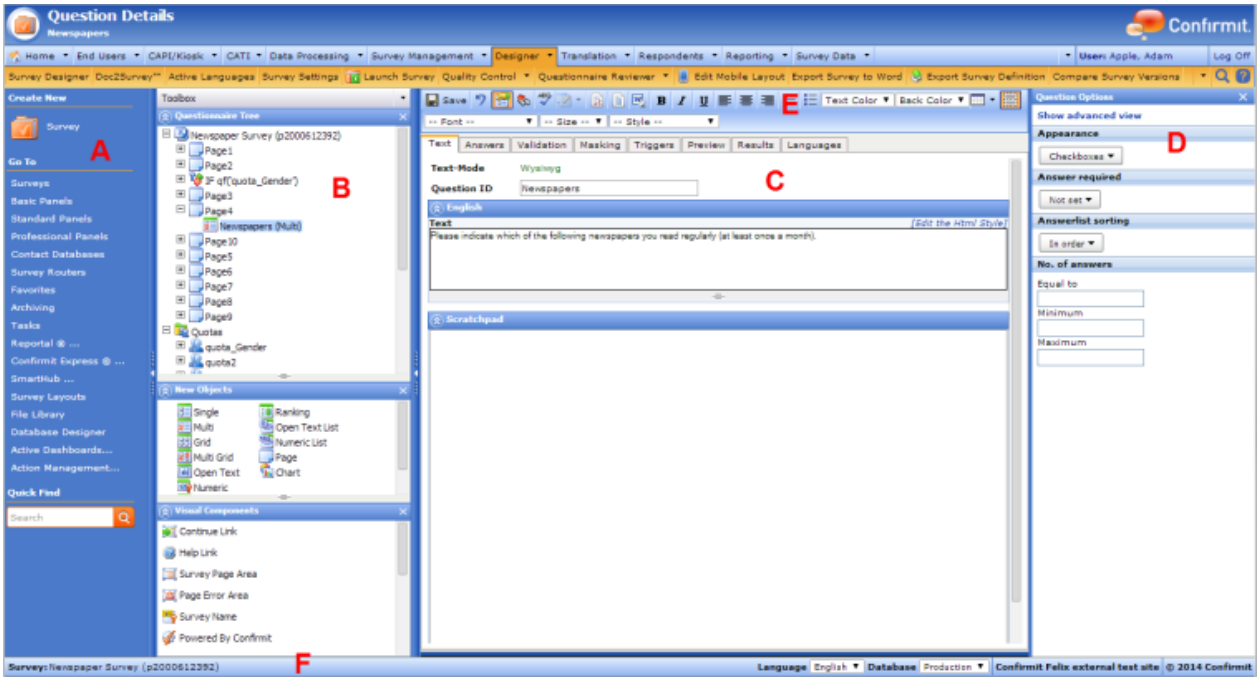


Figure 14 Panes and frames in Confirmit

The **Quick Access pane (A)** gives you access to the most frequently used functionality in Confirmit, and to the Quick Find search field. Here you can search for surveys, panels, and Reportal reports by their IDs or titles. If you have only one hit, the survey/panel/report will open instantly. If you have more than one hit, the items will be displayed in a menu allowing you to select the one you are interested in. If you have hits within different categories (survey, panels, reports) they will be grouped by category. In the event you need more space on the screen, you can open and close this frame by clicking on the **Pane Open/Close** button in the border to the right of the frame.



Figure 15 The Pane Open/Close button

When you enter Survey Designer for a survey, the **Questionnaire Toolbox pane (B)** opens displaying the Questionnaire Tree, New Objects, and Visual Components toolboxes. Open and close this frame by clicking on the **Pane Open/Close** button in the border to the right of the frame.

The editing pane **(C)** is the main frame in the Confirmit window. It is in this area that you will do most of your work on surveys etc.

The **Properties Frame (D)** displays the property sheet of the current question. Toggle this sheet by clicking on the **Show/Hide Properties** button in the Question Details page toolbar **(E)**, and see more properties by clicking the **Show advanced view** button in the Properties pane (see Property Sheets on page 31 for more information).

The lower frame of the window **(F)** displays information about the currently selected survey.

3.2. Menus

Confirmit HorizonsAuthoring is controlled by a menu system comprising a number of "top level" menus each with a number of submenus. You can customize each of the menu bars by adding and removing menu buttons. To do this, right-click on the menu bar and select/deselect menu items as required. Note that all items for a particular menu will still be available via the menu drop-down accessible by clicking the down-arrow button beside the appropriate main menu button.

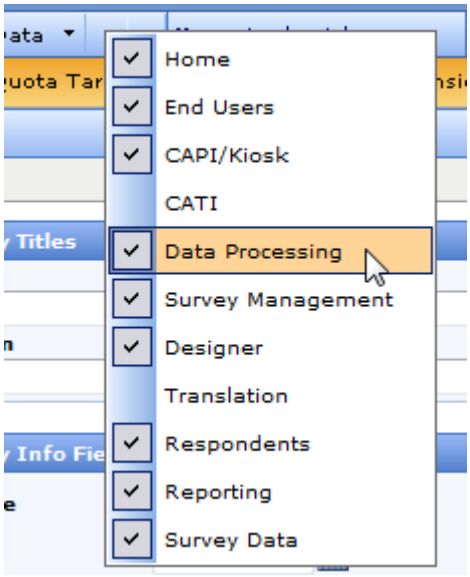


Figure 16 Customizing the menu bar

Several of the menus will only be visible if your company has licensed the add-ons to which they apply. The CAPI/Kiosk and CATI functionality is described in separate user guides; the functionality accessible via the remaining menus is described in various chapters and sections in this user guide.

3.2.1. The Home Menu

The Confirmit menu is divided into three levels. When you log into Confirmit, the Home menu is displayed as an orange bar across the top of the browser window.

Note: The illustrations show the menus as presented to a Professional user. A Standard user will be presented with a reduced set.

Note: Some of the items shown in the figure may not be displayed in your menu as they are Add-ons and may be subject to payment.



Figure 17 The Home menu

The bar in which the **Home** button is displayed is the main menu bar. The buttons in this bar will be blue when they are not selected. When you select a button, it becomes orange and the menu items within this button will be displayed in the orange menu bar under the blue menu bar. The Home menu will always be activated when you log into Confirmit.

The same menu can also be accessed if you click on the drop-down arrow on the **Home** button.

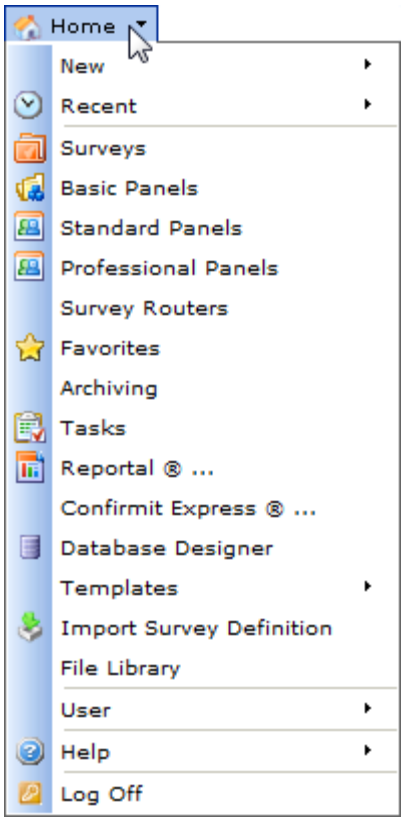


Figure 18 The Home drop-down menu

Some of the buttons in the **Home** menu also have drop-down buttons. This indicates that these menu items have sub-elements.

You can right-click on the menu bar and customize it by removing and adding menu buttons.

3.2.2. Survey/Panel Management Menu

Once you choose a survey or a panel, the Overview page and the **Survey Management** menu will be displayed.

Note: The illustration shows the menu as presented to a Professional user. A Standard user will be presented with a reduced set. Also, some of the items in the menu may not be displayed in your menu as they are Add-ons and may be subject to payment.



Figure 19 The Survey Management menu

When you enter a panel, the **Panel Management** menu will be activated. This differs slightly from the "standard" Survey Management menu because it also includes panel-specific menu items. Refer to the Professional Panels User Guide for further details.

3.3. Toolboxes

The toolboxes located towards the left side of the Designer page are displayed and available throughout the process of creating and editing a questionnaire. You can close the toolbox column by clicking the **<** icon located in the vertical frame on the right side of the toolbox column. Via the toolboxes, you have access to the current questionnaire, the objects and visual components that can be used in questionnaires, and other surveys from which you may wish to copy questions to the current questionnaire.

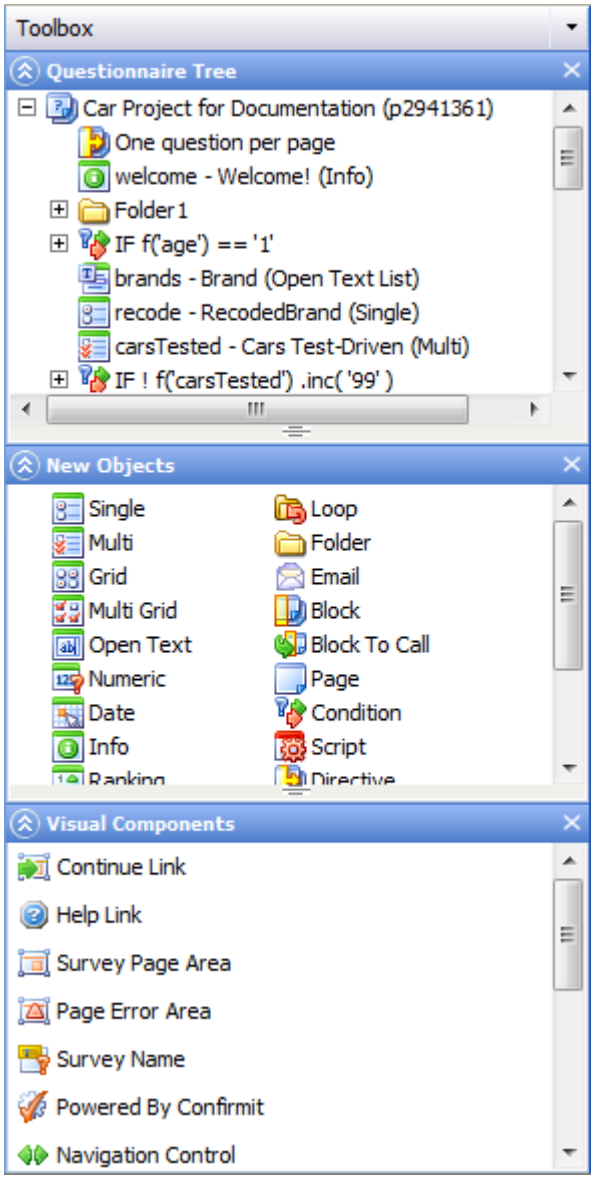


Figure 20 The Toolboxes

Click on the drop-down arrow in the upper right corner of the toolbox panel to open a menu (see the figure below). Using this menu you can add or remove the items from the toolbox as required. Alternatively, you can hide the items by clicking the **X** button in the upper right corner of each item.

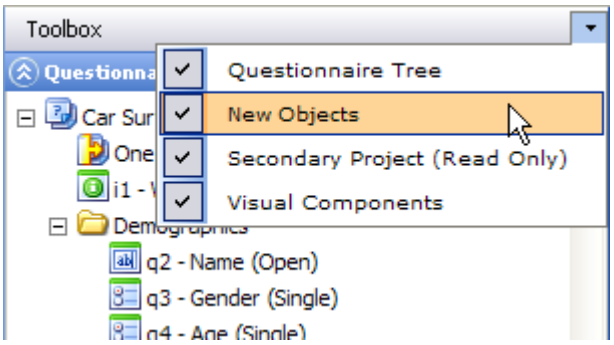


Figure 21 Removing toolboxes

The various panels in the Toolbox can also be collapsed by clicking the arrow button in the upper left corner of the appropriate panel. In the example below, the New Objects and Secondary Project items have been collapsed. Click on the **Expand** button (the downward-pointing chevrons) to reopen the panel.

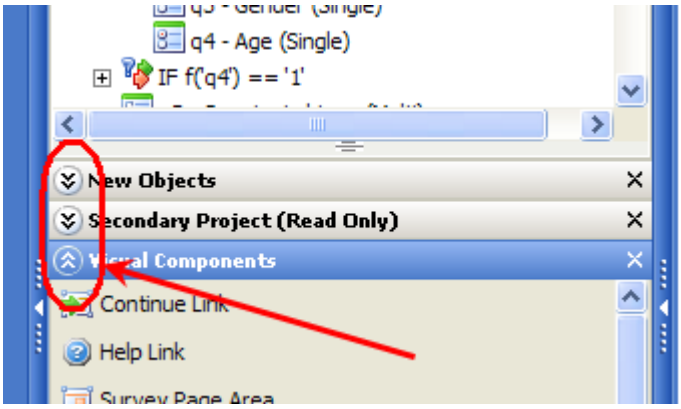


Figure 22 Collapse toolboxes

You can rearrange the panels in the toolbox. To do this, click and hold the mouse pointer on the blue header bar, then drag the panel to the desired location.

To resize the toolboxes, click on and hold the - icon located in the lower frame of each toolbox panel, then drag the frame vertically to the desired position.

To edit an object in the Questionnaire Tree, either double-click on it or right-click on it and choose **Properties** or **Edit** from the menu.

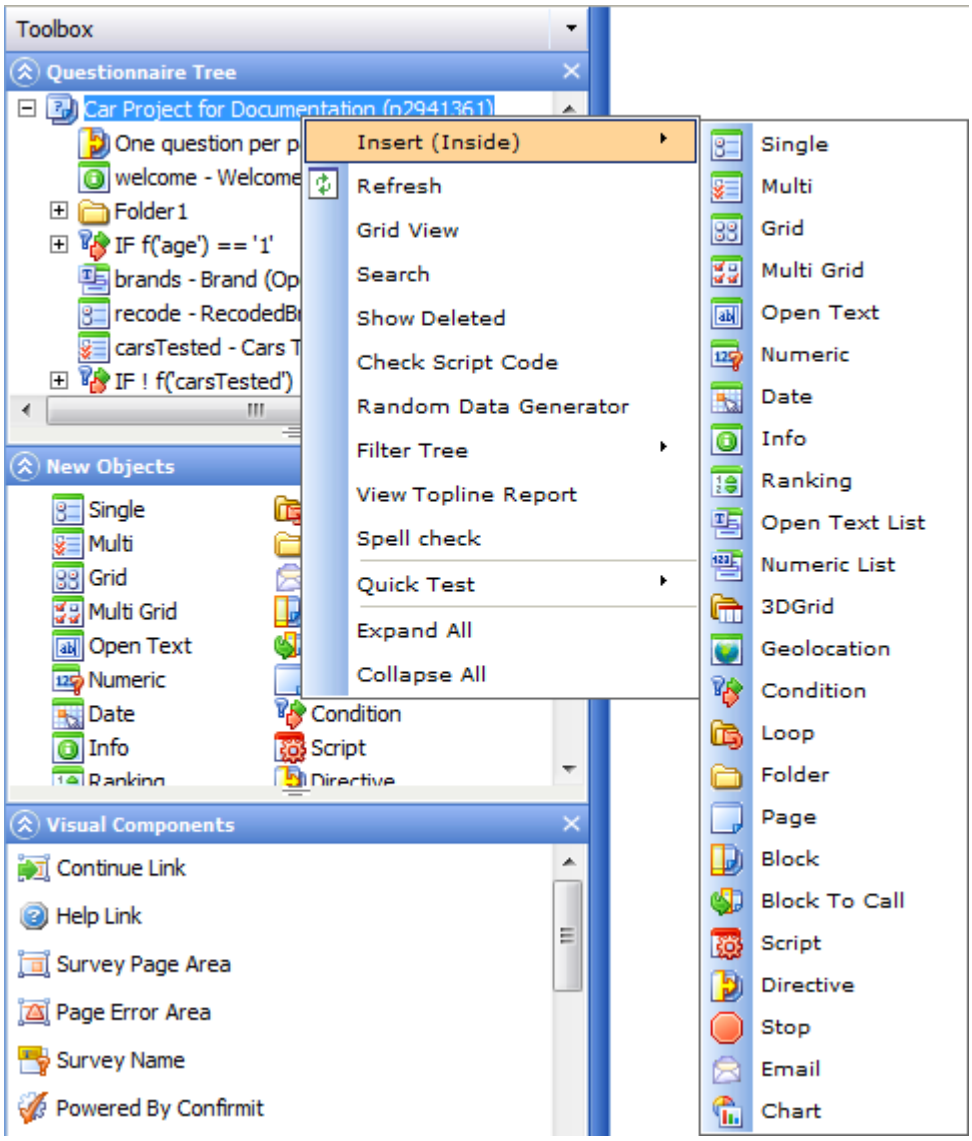


Figure 23 The survey's right-click menu

The right-click menu will contain different items depending on the object selected:

Note: Some of these menu items are not available for Standard users.

- **Edit -** opens the object's editor page.
- **Insert (After)** - displays a new menu with all the items from the New Objects toolbox. Select an object from this menu to insert it after the object that you right-clicked.
- **Insert (Inside)** - appears when you right-click on folders. A new menu is displayed with all items from the New Objects toolbox. Select an object from this menu to insert it inside (below in the tree) the object that you right-clicked.
- **Spell Check** - opens the Spell Checker for the question (see Spell Checker on page 326 for more information).
- **Refresh** - refreshes the Questionnaire Tree to reflect the recent changes.
- **Grid View** - opens the Grid View configuration page (see Grid View on page 316 for more information)

- **Search** - opens the Search Options page (see Search on page 323 for more information).
- **Convert to -** objects can in many cases be converted to another type if required. The types to which you can convert an object depend on the original object; for example a Date object can be converted to an Open Text or a Numeric object.
- **Show Deleted** - shows any nodes that have been soft-deleted (see Deleting Objects on page 315 for more information).
- **Check Script Code** - [not Standard user] checks the scripts, validation codes, masking codes and conditional expressions in the questionnaire. A list of errors (if any) is generated and displayed as clickable links in a separate pane below the Script Node Editor. Click on an error link to open the script object containing the error, and the object will also be highlighted in the questionnaire tree (see Check Script Code on page 473 for more information). Note that you do not have to compile or generate to use this feature.

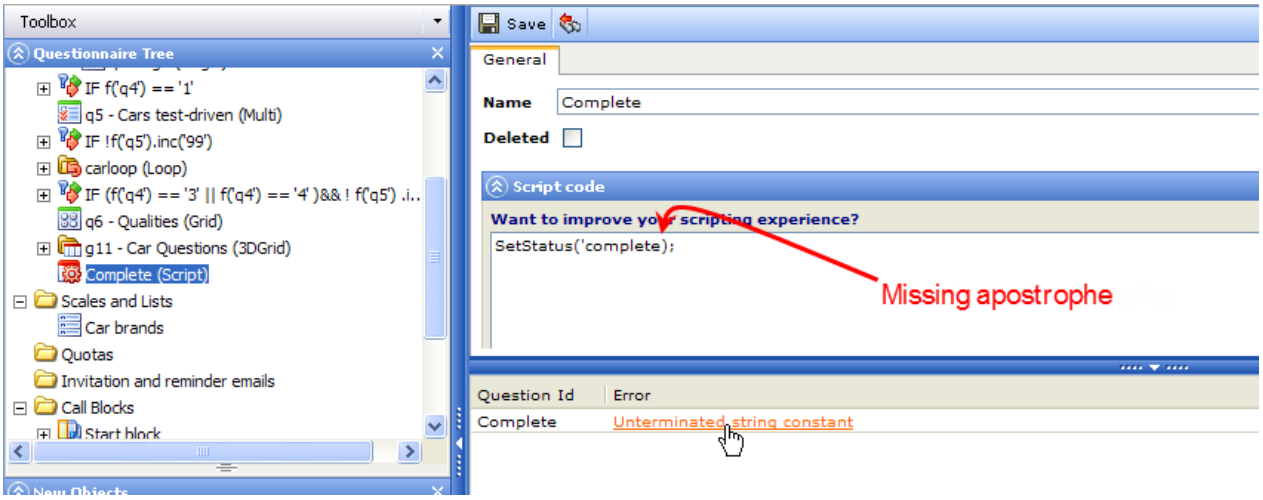


Figure 24 Checking script code

- **Random Data Generator** - [not Standard user] opens the Random Data Generator page (see The Random Data Generator on page 477 for more information).
- **Filter Tree -** displays a menu with all items from the New Objects toolbox. You can filter the tree to only display one type of objects, for example, all single questions.
- **View Topline Report** - displays the topline report for the questionnaire item (see Rapid Results on page 706 for more information).
- **Quick Test** - enables you to test the questionnaire or individual questions (see Quick Test on page 472 for more information).
- **Duplicate** - creates a duplicate copy of the selected object in the questionnaire tree.
- **Delete** - "soft-deletes" the object from the questionnaire tree (see Deleting Objects on page 315 for more information).
- **Properties** - select to open the Properties page for the object.
- **Expand All** - expands all folders and conditional expressions.
- **Collapse All** - collapses all folders and conditional expressions.

Some of the objects in the Secondary Project (see The Secondary Project Toolbox on page 312 for more information) can be right-clicked to display an action menu.

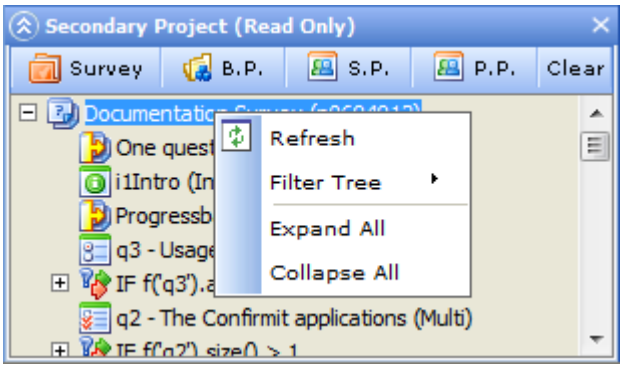


Figure 25 Menu in secondary projects

3.4. Property Sheets

Most objects in the Questionnaire Tree toolbox have a wide range of properties and settings. You can customize these via the object's property sheet. To open the property sheet, right-click on the object in the toolbox and choose **Properties**, or double-click on the object and click the **Toggle the properties for this question** button (arrowed) if the property sheet is not already displayed. The property sheet opens at the Simplified view, with a few of the most-used properties that are applicable to the question type. Click **Show advanced view** (ringed) to view the full property sheet. The full property sheet may have several tabs, but it will always display the type and name/title of the active object.

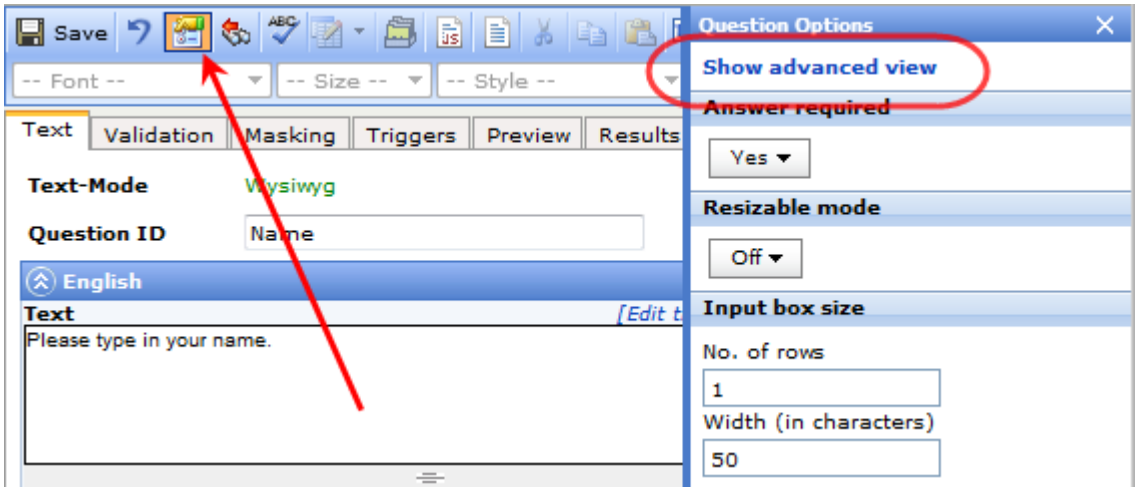


Figure 26 Example of a property sheet for a single question

The properties available for the various question types are explained in more detail in the Question Properties section.

3.5. Drag-and-Drop Operations

In Confirmit, most objects can be moved to different destinations by using the drag-and-drop method. Afterwards, they can be edited by double-clicking or right-clicking and choosing **Properties** or **Edit** from the menu.

When editing Questionnaires, you can drag the elements from the **New Objects** and **Secondary Project** toolboxes, and drop them into the questionnaire routing. The dotted line indicates where the item will be placed.

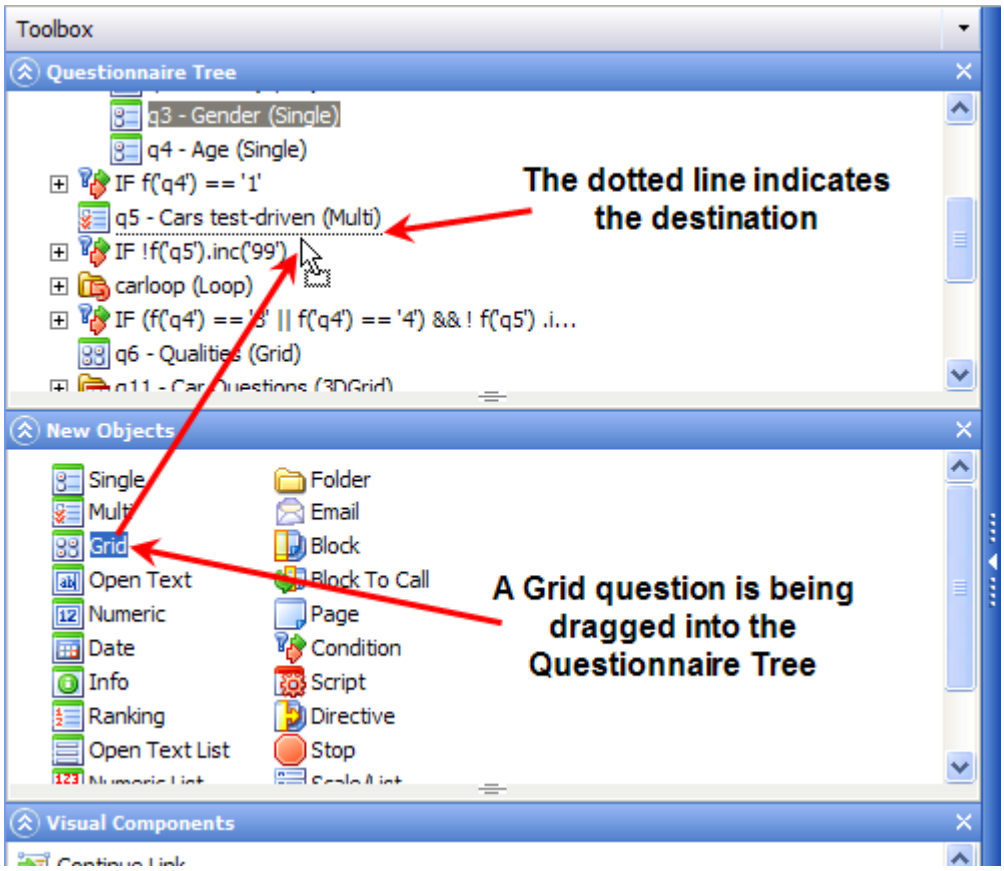


Figure 27 Drag-and-Drop operations

When inserting items into folders (usually the item that is to be the first item in the folder), you must point the mouse pointer at the folder icon itself so that the folder opens, and then drop the item in. The name of the folder will usually be highlighted. If you want to drop an item after a folder, point to the name of the folder until the dashed line is displayed underlining the folder, and then drop the item.

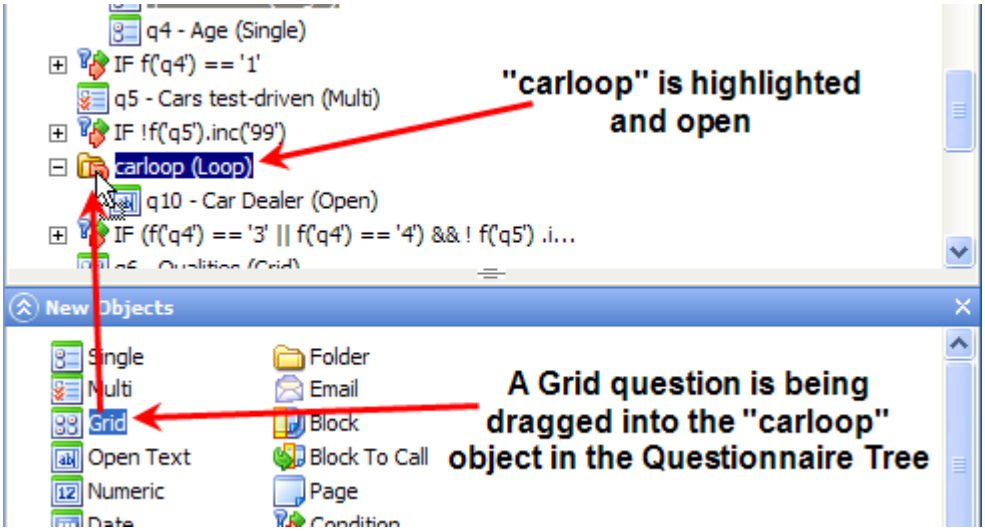


Figure 28 Drag-and-drop into folder

3.6. Keyboard Shortcuts

You can use keyboard shortcuts to copy (**Ctrl+C**), cut (**Ctrl+X**) and paste (**Ctrl+V**), and use the arrow keys (up, down, left, and right) to move around within the questionnaire tree in Survey Designer. The **Right** and **Left** keys expand and collapse folders, loops, conditions etc. respectively.

3.7. Question and Answer Editing Modes

When you are working in Confirmit Survey designer, you can switch between two editing modes: the WYSIWYG mode and the HTML (Plain text) mode. The active mode will be indicated in the Text-Mode field. See the following sections for further details.

3.7.1. Text Modes

You can use one of two modes when working in Confirmit Text tabs:

- WYSIWYG
- HTML

When you are using the WYSIWYG editor, you can format the text by using the buttons in the formatting toolbar. For example, in the picture below, the text “Please select your gender” is displayed in bold italic Verdana font.

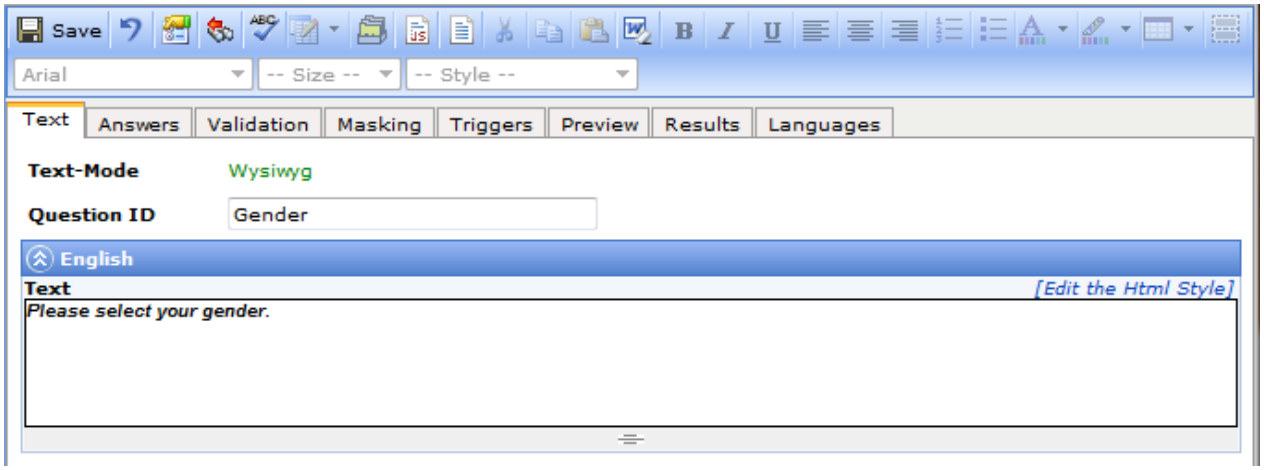


Figure 29 Working in the WYSIWYG editor

**Note: Pressing the ENTER key in WYSIWYG mode will create a paragraph break, represented by HTML code <p> in HTML (Plain text) mode. Pressing the SHIFT+ENTER keys will give a single line break, represented by
 in HTML (Plain text) mode. However, in Answer lists both ENTER and SHIFT+ENTER will give a single line break.**

When you use the HTML Source editor, you must write HTML code in the text fields to format the text. Click the **Switch between...**button (arrowed) to toggle the editor to the HTML Source mode. The layout changes to that shown below. Note that the WYSIWYG formatting toolbar is now inactive.

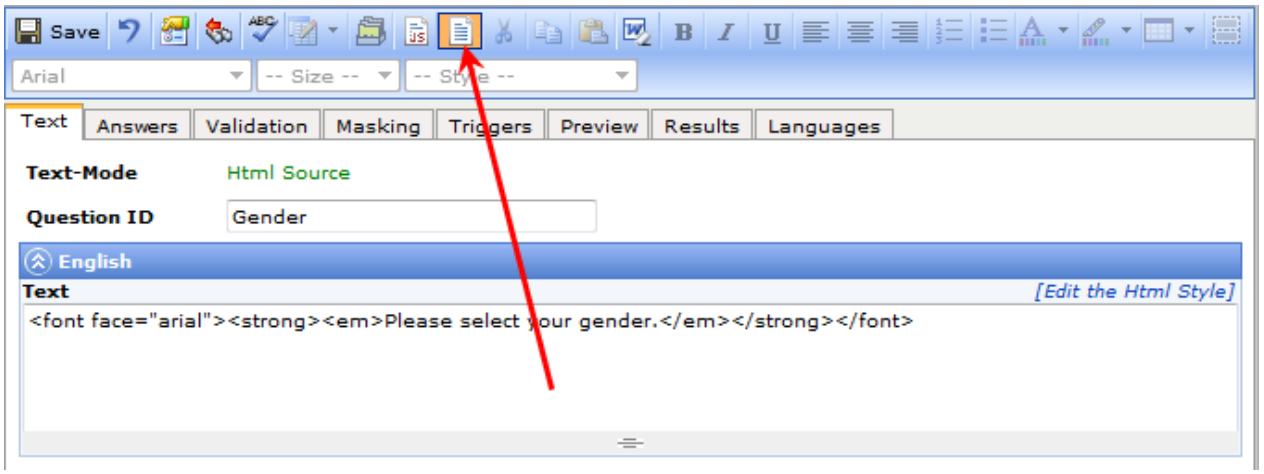


Figure 30 Using the HTML editor

3.7.2. Answer Lists and Scales

When editing Answer lists and Scales you can choose between three editing modes:

- The ActiveX answer list (you will need to download an ActiveX plug-in).
- The DHTML answer list.
- The Silverlight answer list.

Click on the **Answerlist Mode** button and select the desired mode from the drop-down (the currently selected mode is ticked). The ActiveX answer list is the default answer list if your browser supports ActiveX. If your browser does not support ActiveX, a warning will be displayed and you will have a choice of either downloading the ActiveX FlexiGrid component, or switching to one of the other modes.

The ActiveX input mode supports long answer lists. However if the answer list contains several hundred items, you are recommended to use the Silverlight mode or the Table lookup functionality that Database Designer offers (see Database Designer on page 399 for more information).

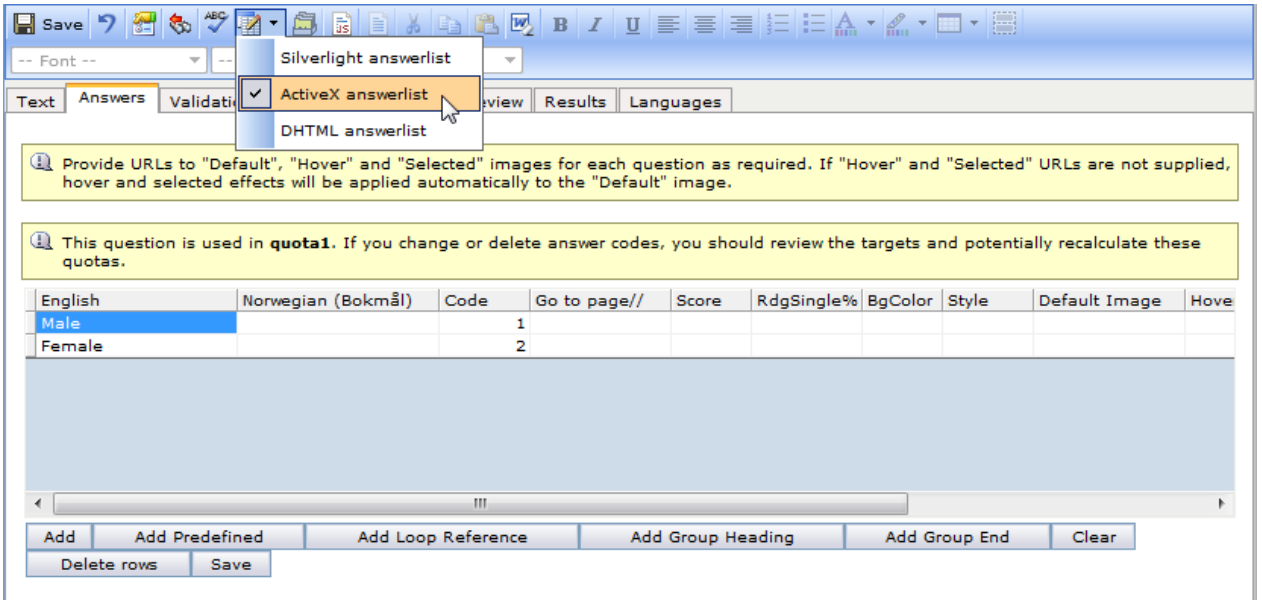


Figure 31 ActiveX answer list

The DHTML answer list does not require any plug-in downloads. The only difference between the performance of this answer list and the performance of the ActiveX answer list is that when you paste longer answer lists into DHTML, the system will be slightly slower. However, this will only occur when new rows are added, not when reopening an existing list. This input mode does not support very long answer lists.

Note: A maximum of 100 items can be added to an answer list. An error message will be displayed if you attempt to add more.

Note: If you have problems pasting answer lists into Confirmit when using Internet Explorer as your browser, go to Tools > Internet Options > Security tab, select the Trusted Sites zone and click on the Custom Level button. In the selection dialog, scroll down to the Scripting section and ensure that Allow Programmatic Clipboard Access is set to Enable.

In the picture below, the DHTML answer list and WYSIWYG editing mode are selected. If you want to remove one or more of the columns in the answer table, open the **View** drop-down and deselect the appropriate rows.

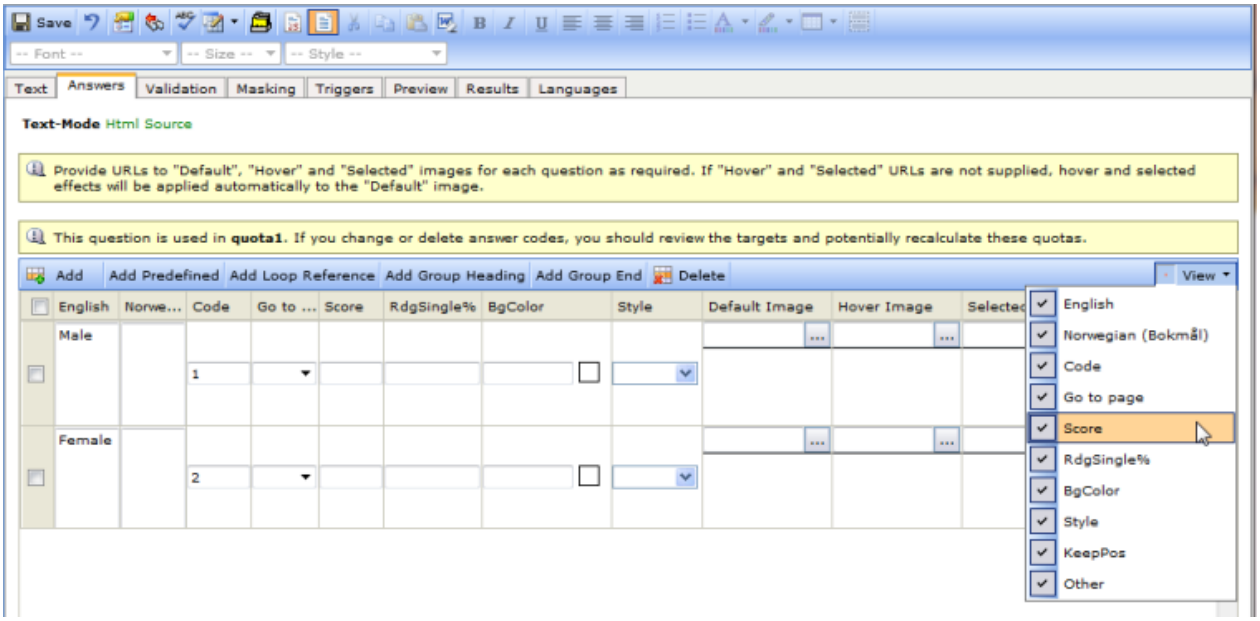


Figure 32 DHTML answer list

To copy and paste several elements from the DHTML answer list component, select the elements by ticking the checkboxes next to them, and then right-click and select **Copy** or press **Ctrl+C**. To paste these answers into another answer list, use right-click **Paste** or **Ctrl+V**.

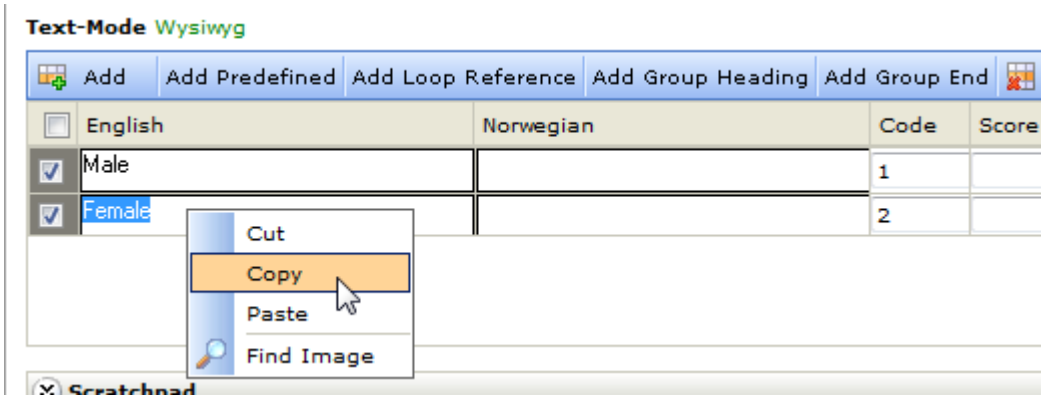


Figure 33 Copying rows in a DHTML answer list

Set Row Height opens a pop-up window in which you can define the height of the answer cell in edit mode.

The Silverlight answer list requires you to download and install the Silverlight application from Microsoft. Silverlight is a free plug-in, and is Microsoft's framework for creating rich Internet applications. It enables a more Excel-like navigation/user interface for the answer list, which supports handling long lists, the same copy/paste operations as in Excel etc. Note that Silverlight supports Japanese characters.

Note: If you select one or more cells and click Clear, any text in the selected cells will be cleared whilst text in cells that have not been selected will not be cleared. If you select one or more cells and click Delete rows, the entire row(s) containing the selected cell(s) will be deleted.

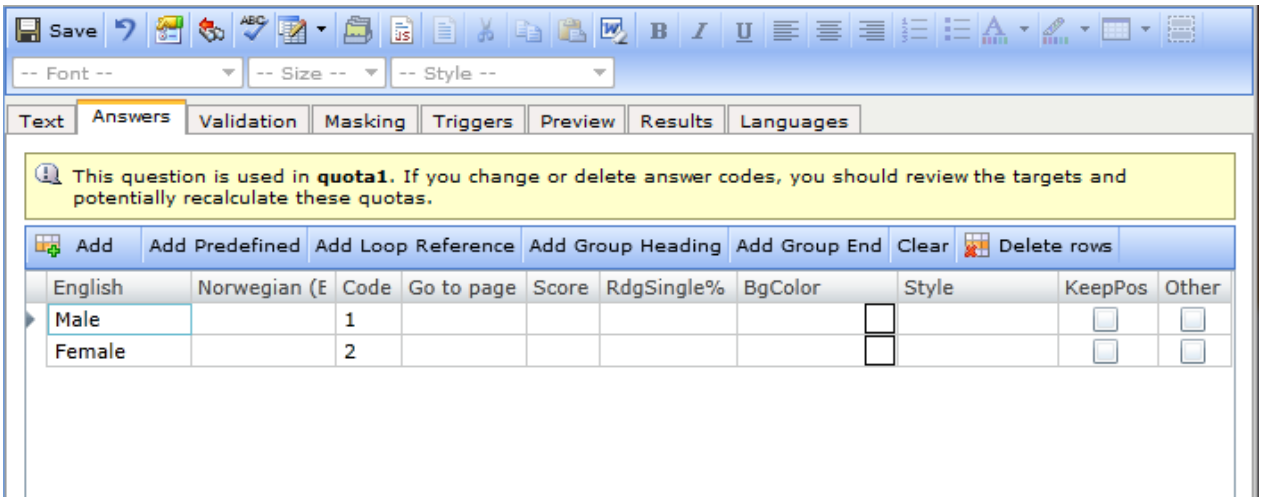


Figure 34 The Silverlight answer list

For more details about answer lists and answer list properties, go to the Answers section.

3.8. Logos

To include a logo in a question text, drag the logo, for example from a website, into the text field or answer cell. You can also copy and paste the logo into the text field. Only logos that do not point to other website pages, i.e. logos that are not links, can be inserted into Confirmit text fields by dragging them directly from a website.

In the illustration, the Confirmit logo is being dragged from the company's own web page into the text field.

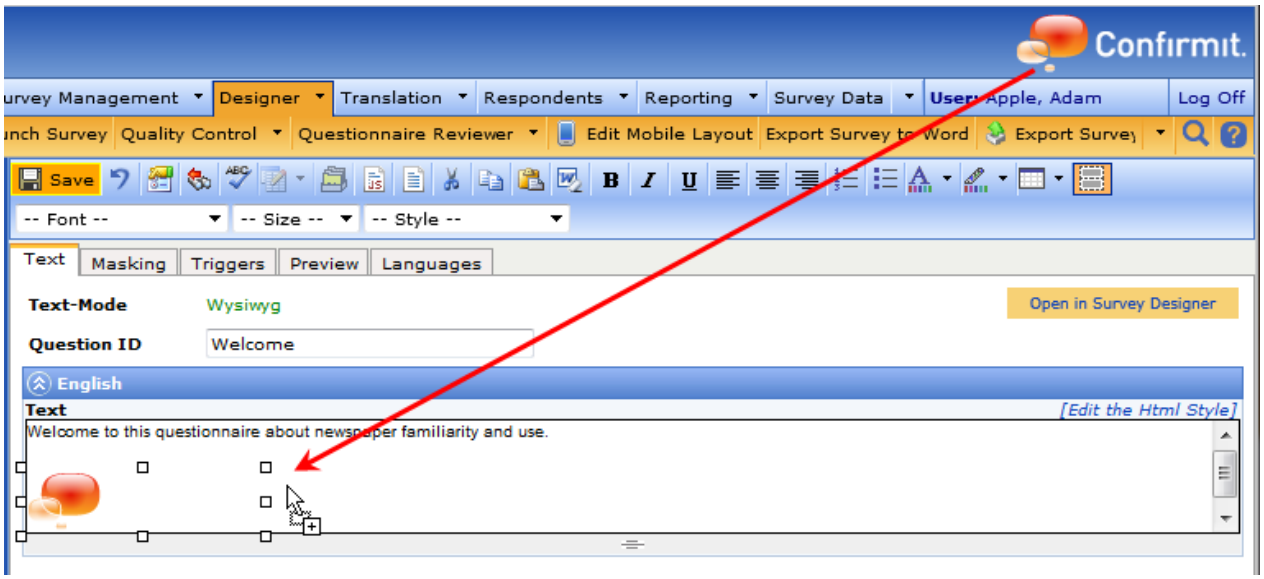


Figure 35 Dragging a logo into the text field

3.9. Languages in Confirmit

The information on this page is also provided in the relevant sections elsewhere in the manual.

When you create a survey, on the New Survey page you select the languages to be used for that particular survey (see Creating a New Survey on page 202 for more information). The default will be that selected in your User Settings page (see User Settings on page 134 for more information), but as a Professional user you can create your survey in as many languages as you need. If you wish to add more languages whilst creating the survey, click the **Add more languages** button to open a Select Languages dialog, and select the languages you wish to use. Click **Use these languages** to return to the New Survey overlay. You can add more languages at any time by going to the **Survey Management > Overview** page; scroll through the Languages list and select those you wish to use. Note that Standard users must have a special "Multilingual" permission to create multilingual surveys.

Each place in the survey when translated text will need to be available in the respondent's selected language, such as a question's Text and Answer tabs, the Email Details page etc. will have text fields for each of the languages you have selected for that survey. You can then write into the various fields the appropriate texts in those languages. A maximum of five language fields can be displayed at any time. Go to the Question Details page > Languages tab for any question to select which of the languages activated for the survey are to be displayed on the question tabs at this time. Note that the Languages page is common for all questions in the survey; the languages selected in this page for one question will be available for all the questions in the survey.

Tables created in the Database Designer are not survey-specific; they can be used in any survey. The languages available in the tables are therefore not controlled by the settings in the Languages tab. If you are using the designer to create a database table for example for use in table or hierarchical lookup, then you will need to add the required languages via the table properties (see Table Properties on page 402 for more information).

Texts and other messages that may be presented to Authoring users and respondents by the Confirmit system are translated into a number of "standard" languages. However you may wish to have the messages displayed in a language that Confirmit does not provide as standard, or you may wish to change some of the texts and messages to suit a particular survey or dialect. You can edit the messages on the Survey Messages page (see Survey Messages on page 190 for more information).

3.10. Language and Database Modes

Confirmit keeps two separate databases for each survey; a test database and a production database. When working with surveys in Confirmit, you can switch between the Test and Production modes, and also select the default survey language in multilingual surveys, at any time. Click the down-arrow beside the Database or Language fields in the lower right corner of the window, then select the appropriate option from the resulting list.

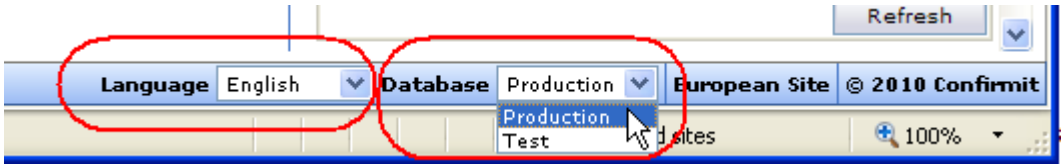


Figure 36 Language and database mode selection

In the Launch Survey and Survey Settings pages the system at all times indicates the database in which you are currently working.

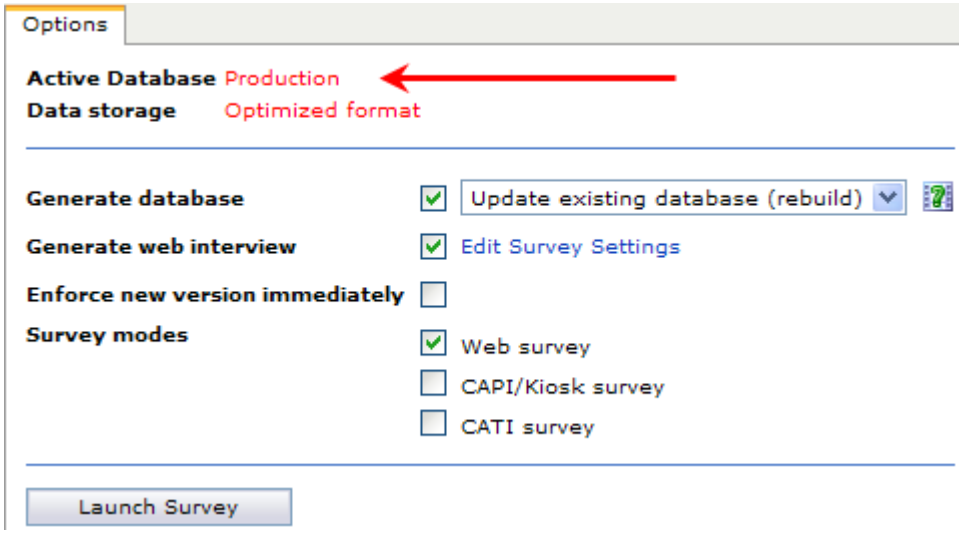


Figure 37 The active database shown in red text on the Launch Survey page

Note: Standard users must be allocated a special Multilingual permission if their surveys are to have more than one language. Unless this permission is activated, for Standard users the Language selection drop-down will display only the default survey language. Also, Standard users do not have access to the Test database, so the Database selection field is not available to them.

3.11. The Optimized Database Format

The Optimized Database Format was new in Confirmit 12.5, and is the version of a database format which forms the platform for the modern, multimodal data collection system. The optimized database format has several benefits compared to the previous format. This format will by default be selected when creating new surveys. The main benefits of the Optimized Database Format are improved scalability and performance, and some new survey functionality that will only be available when using this format.

Scalability:

- Reduced physical storage space is needed for survey databases (on the server). All variables will be stored as more appropriate data types. This will be handled automatically by the system during survey launch. The system will evaluate the actual codes and settings applied to the questions, and choose the most appropriate variable type.
- It is now possible to host several surveys on one single database instance. This is achieved by enabling the storage of response data from several surveys within the same physical database. This functionality will by default not be available, but can be enabled on request (contact support@confirmit.com) (company setting).

Performance:

- Faster data retrieval for long and complex surveys.

- Faster database generation.
- Reduced memory usage on survey engine (on server).

The Optimized Database Format provides an alternative way of storing responses from single, multi and grid questions. This enables better support for storing responses from multi and grid questions with very long answer lists. In the answer list it will be possible to refer to a loop, in which case the "loop members" (the answer list in the loop) will be used as the answer list, and the responses will be stored in the loop structure in a separate db table with one row per response per respondent. Where loop references are being used, any additional codes added after the loop reference must have an explicit code assigned. Auto-generated codes will not be allocated. This ensures that duplication of codes does not occur.

A further advantage of the loop system may be derived if the loop used in a question refers to the answer list located in the Database Designer. In this case you can add or remove answer options to/from the answer list without the requirement to regenerate (launch) the database. This means that you can for example set up a recurring task to update the answer list so that the respondents will always have an up-to-date list of options to select between.

This database format has allowed a number of new features to be added to Confirmit, as listed below:

- The new database format provides a scalable solution.
- Long answer lists are supported, particularly for multi and grid questions.
- Boolean and Date data formats are supported for open text and single questions. These appear as options in the questions' property sheets.

The database format that is to be used for a survey is selected during survey creation on the Survey Name dialog (see Creating a New Survey on page 202 for more information), and can be changed on the Survey Overview page. Note that the format must be selected before the Test or Production database is generated (the survey is launched) for the first time. If the Optimized format is selected, then once the database is generated the format is fixed and cannot be changed. If the Legacy format is selected and Survey Layouts are used, then you can later change to Optimized (see the Important note below). Only users with Administrator rights to the survey can select the database type.

Note: When using Reportal with a survey that uses the Optimized format, BitStream files must be used (see BitStream Files on page 735 for more information). An error message will be presented if BitStream Files are not used.

Some functionality that is available in the older database format is not available in the Optimized format. The menu commands controlling this functionality will therefore not be accessible when the Optimized format is selected. The functionality that is NOT available in the Optimized format database is as follows:

- **Edit Templates** - Web Interface templates are not available. These are superceded by Survey Layouts (see Survey Layouts on page 65 for more information).
- **Rule-based sendouts** - this functionality is superceded by that now available in the Data Processing module. Refer to the Data Processing documentation for more information.
- **Online Reporting** - this functionality is included in and superceded by Reportal. Refer to the Reportal User Guide for further information.
- **Individual Reporting** - this functionality is included in and superceded by Reportal. Refer to the Reportal User Guide for further information.
- **Filters** - this functionality is included in and superceded by Reportal. Refer to the Reportal User Guide for further information.
- **Calculate Variables** - some of this functionality is included in Reportal. Refer to the Reportal User Guide for further information.
- **Published Reports** - this functionality is included in and superceded by Reportal. Refer to the Reportal User Guide for further information.
- **Survey Data Exports** - this functionality is now available through the Data Processing module. Refer to the Data Processing documentation for more information.
- **Survey Data Imports** - this functionality is now available through the Data Processing module. Refer to the Data Processing documentation for more information.

- **Survey Data Template Editor** - this functionality is now available through the Data Processing module. Refer to the Data Processing documentation for more information.
- **Online Coding** - this functionality will be available in the Optimized format, though with some limitations (see The Online Coding Tool on page 658 for more information).

Note: As both database formats are available for use by questionnaire designers, all functionality is described in this manual. Where functionality is not available in one or the other database format, this is noted in the appropriate section.

Important
For surveys created in the Optimized format, before you launch the survey for the first time and thereby create the database, you can change the type of database that is to be used. However once you have launched the survey and the database exists you can no longer change the type.
For surveys created in Legacy format and using a survey layout, whenever you launch the survey you can select to change the database format to Optimized. Note that once the database is in the Optimized format it cannot be changed back to Legacy again.

Note: If a survey scripter attempts to set an unknown code on a single, grid or 3D-grid, the value is ignored (not set), and a warning email is sent to the survey owner. The respondent will not see any errors. In a similar fashion, if a scripter attempts to set a value that is longer than the field width, the value is truncated and an warning email is sent to the survey owner. Again, the respondent will not see any errors.

3.12. Search Lists

You can search for existing Surveys, Panels, and Tasks. The Survey and Panel search lists function in the same way and have similar search options. Note that the Task search list is slightly different (see Tasks on page 55 for more information).

The picture below shows an example of the Survey search list (click the **Surveys** button in the main toolbar, or go to the **Home > Surveys** menu command):



Figure 38 Example of a Search list

The fields across the top of the list allow you to search by Survey ID, Survey Name, owner Company, the Creator of the survey, by report creation date in “Created”, by Keywords and by Status. When searching by Status, if Maintenance mode is selected, the status in the survey list will be the status that was selected before Maintenance mode was selected.

Note that when searching, a wildcard is automatically added after the text you enter, but not before.

- For creation dates ("Created"), you can select operators: Less than, less than or equal to, equal to, greater than, and greater than or equal to.
- Your search can produce several active links as shown in the example above. Click on a blue Survey ID link to go to open that survey and go to its Overview page. If you move the mouse pointer over a Survey ID link and click on the drop-down button that appears to the right of the link, the survey menu will be displayed. **Overview** opens the Survey Overview page, **Designer** opens the Survey Designer where you can edit the questionnaire, and **Add to Favorites** adds the survey to the Favorites list.

- If your search returns more items than can fit on one page, use the **Back** and **Next** page arrows to switch between pages and browse through the list. The default number of items displayed is set to 50.
- In this list, you can also check one or more items and delete them by clicking the **Delete** button at the top of the list. To select all, check the checkbox at the top of the list, next to "Survey ID."
- You can also move several surveys simultaneously to the Favorite surveys lists. To do this, check the checkbox next to the desired surveys and click **Add to Favorites**. To select all, check the checkbox at the top of the list, next to "Survey ID."
- To sort the list by one of the columns, click on the column header. An arrow will indicate in which direction the list is sorted, ascending or descending.
- Click on the alphabet buttons in the lower frame of the window to list only those surveys for which the name starts with the selected letter.
- In the Survey Category drop-down you can select the category of the displayed surveys. The default value is Normal, which means that ordinary surveys will be displayed. The other options are: All, Template, Benchmark, and Library.
    - The surveys that are marked with category Library will usually be surveys that you wish to keep for later reference.
    - The surveys that belong to the category Template are specially marked Library items. They will be available when you create new surveys and choose to base a new survey on an existing survey template in the step where you have to specify the survey name. Surveys that you want to store for later reuse can be stored in Library category. The surveys that belong to the Benchmark category will usually be surveys that you set up for reporting purposes in Reportal. See the Reportal User Manual for more details.

Click **Reset** to clear the search criteria and present the entire list.

3.13. Accessibility

Web accessibility refers to the inclusive practice of removing barriers that prevent interaction with, or access to websites, by people with disabilities. When sites are correctly designed, developed and edited, all users have equal access to information and functionality.

A very important question to ask is, how accessible is your website to those with disabilities and other difficulties? For example, is it easy is it to navigate your site, to read content, to perform a task? Does the site work with a screen reader, does it require the use of a mouse, was the look and feel designed for partially slighted users, etc…

Confirmit offers an accessibility functionality (the "Accessible Mode") to help achieve this (see The Accessibility Functionality on page 43 for more information). However conforming to accessibility regulations or meeting your organization's accessibility requirements is not something Confirmit can guarantee (see 508 Compliance on page 46 for more information). When this functionality is turned on, the core survey functionality has been designed to meet W3C recommendations. Nevertheless, whether or not your survey is "accessible" really depends on how you design and build your survey. If you have added custom content such as images, videos, scripting, HTML markup and styling into your survey, the accessibility functionality will not evaluate this content (see Features Not Supported in Accessible Mode on page 45 for more information).

That being said, if you have a specific set of accessibility rules and regulations to ensure your survey meets the requirements, you will need to enable the Confirmit accessibility functionality, design the survey with accessibility in mind, and then take the survey to test and assess where changes might be needed.

A survey is a web page. This section contains some tips for creating a survey with accessibility in mind.

3.13.1. Proposed Workflow

1. Make a copy of the survey layout that you plan on using and apply this duplicate to your survey

   You will need to make changes to the survey layout so it is probably best to keep a copy of your original survey layout.

2. Turn Accessibility Mode on in your themes.

   Right click on each theme and choose "Toggle Accessibility mode". You should then see (ACC) next to the theme name, signifying that it's enabled.

3. Launch the survey and check for accessibility warnings.

   Horizons will display warnings and errors for a number of different reasons. Some may require your attention.

4. Test the survey

   If you need to support a specific screen reader, run through the survey using that software. Check that the survey meets your accessibility requirements.

5. Make adjustments
6. Repeat steps 3 through 5 until no longer necessary.

3.13.2. Confirmit's Suggestions

Survey Settings - Within the Application

Depending on how strict your accessibility requirements are, you might wish to configure one or more of the following survey settings / properties:

- For each Question Skin in your layout, open the "Question Form Inputs" properties. Under the General tab, towards the bottom, you should see the following options:
  - "Question Title in Legend"
  - "Question Text in Legend"
  - "Question Instruction in Legend"

  If you want to ensure that screen readers pick up on the question title, question text and question instruction, make sure the related option is checked off here. This moves the title, text and instruction into a inside the <legend> tag. Depending on the layout you're using, this could change the look and feel of the text so you might need to adjust the CSS afterwards.
- When you turn ACC mode on, the navigation buttons should automatically change from ">>" and "<<" to something more accessible friendly i.e. "Forward" and "Back". It also arranges the buttons in a non-table based fashion. However, it is possible you have overridden this, so for each Theme in your layout, check the "Navigation Control" properties. The rendering mode should be either "Accessible" or "Inherit".
- The same applies to the progress bar; make sure you are using "Accessible" or "Inherit".
- In **Survey Settings > Layout > Accessibility Options**, set "Generate Error prefix for error messages".
- Make sure your error messages are clear and concise. You can change the error messages throughout the entire survey by going to **Survey Management > Survey Messages**. Or you can write custom validation code in each question to provide more information. For example, a grid could be missing just one answer out of say 10 rows. Instead of the default "One or more questions require further input", you can check whether the default "Missing Required" error was raised, and if so, change the message using your own text that makes more sense for the relevant question. You can even use the error template and the MISSING field to tell the respondent exactly which question/answer caused the error.

```
if(MissingRequiredError())
{
SetErrorMessage(LangIDs.en, ErrorTemplate("Please review your responses
on this page. You did not select an answer for ^MISSING_AND^."));
}
```

- You can assign certain tags to elements in the survey design. For example, if you need to ensure that header tags are used on each page, it may be best to ensure that the "Question Title" components in your skins use the "H1" tag. You can specify this in the component's properties.
- Keep it simple! Short text whenever possible and one question per page is a good approach.

Other Suggestions – Custom Content

If you have built custom objects into your survey, for example images, video players, changes to the layout, javascript, etc. here are some other things to keep in mind:

- If the image serves a purpose (for example an image in the scale label that explains to the user, this is for “not likely”) do not use the CSS Background property. Use an HTML <img> tag and make sure you have specified an “alt” attribute.
- All other HTML <img> tags need an “alt” attribute to describe the image.
- Make sure your survey layout uses colors that contrast well, and use larger than normal fonts. For example, edit your HTML Styles such as “questiontext” and “questioninstruction”.
- Depending on your requirements, you may need to ensure that elements with focus (via using the tab button for example) are addressed such that the focus is visible. For this you may need to add some code as the example below to your theme’s CSS tab.

```
a:focus, input:focus, textarea:focus { outline: 2px solid #CCCCCC
!important; }
```

- If you are using any <table> tags in your theme/page/skin layouts, give them a role attribute of “presentation”.
- Do not underline text in the question text unless it is a link to something.
- The browser’s tab shows the <title>. The title is typically the survey name, or whatever you have specified on the survey management page. Screen readers typically announce the <title> as it appears on the browser tab every time a page loads, so this can be redundant as the user is moving through the survey. Make it more meaningful by implementing the Javascript code below into your themes. This instead pipes the question title into the page’s <title> tag.

```
<script type="text/javascript">
document.title = "^f(CurrentForm()).label()^";
</script>
```

Important
As you design your survey, keep in mind that some Confirmit features are not supported in Accessible Mode. When the survey is launched you will be warned of any such issues found so you can make the necessary changes.

3.13.3. The Accessibility Functionality

Confirmit's themes have built-in "Accessibility" functionality. When this functionality is activated for a theme, a survey using that theme will be easier (more accessible) for respondents with disabilities to use. The following changes are made automatically when the functionality is activated:

- Some types of questions are laid out such that they are easier to see and the answer options are easier to move to and select.
- Navigation buttons and progress bars are adapted such that they are easier to see and can be recognized by vocalization applications. Note that these options can be set for any theme, and can be switched off if not required (see Survey Layout Component Properties on page 79 for more information).
- The button tabbing order is set such that the **Forward** (next question) button is always the first to be highlighted (see Survey Layout Component Properties on page 79 for more information).
- The question title, question text and question instruction texts can be included in the legend (see Visual Components for Question Skins on page 87 for more information).



Figure 39 Example of the navigation buttons in Accessibility mode (upper set) and normal mode (lower set)

To further improve the survey you can also set up the theme such that it uses larger text fonts, and you can ensure that the page layouts are as clear and simple as possible.

Note that some "standard" Confirmit functionality is not supported in surveys using the Accessible mode (see Features Not Supported in Accessible Mode on page 45 for more information).

You can set up both Accessible and non-Accessible themes for a survey. You can then switch between modes as required such that those respondents who would benefit from using the Accessibility functionality receive the survey in Accessibility mode (see Controlling and Switching Between Modes on page 45 for more information).

Note: When using the Accessible mode, to simplify things as much as possible for the respondent, best-practice stipulates that question texts should be as short as possible. A warning will therefore be displayed during survey launch if any question texts are found to contain over 100 characters. Note that this is not a restriction; the survey will still launch and will be usable, but the existence of "long" question texts will be brought to the designer's attention.

3.13.3.1. How to Activate the Accessibility Functionality

You can activate the Accessibility functionality for a theme wherever that theme is used, or you can activate the functionality for a specific survey. To activate it for the theme:

1. In the Quick Access pane, click on the **Survey Layouts** item.

   The Survey Layout List opens.

2. Click on the desired survey layout to open it.
3. In the Layouts and Styles toolbox, expand the **Themes** folder.
4. Right-click on the desired theme to open the drop-down menu.
5. Select **Toggle Accessibility Mode**.

   This switches on the functionality and places the notation **(ACC.)** after the theme name in the list..

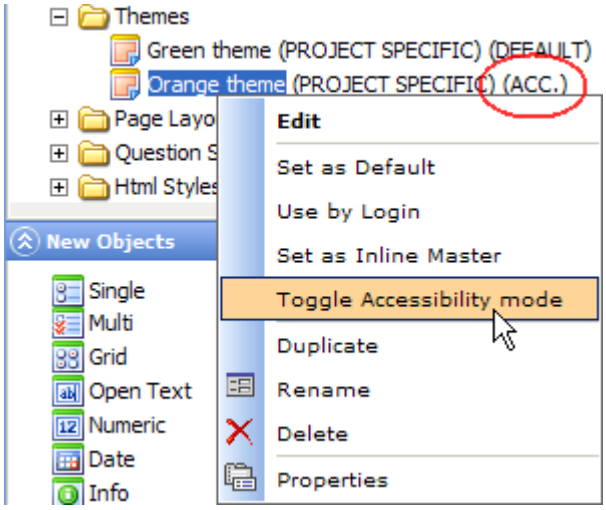


Figure 40 Toggling the Accessibility mode

To activate the Accessibility functionality for a survey:

1. Open the survey, and in the Designer page go to the Questionnaire Tree toolbox.
2. Expand the **Survey Layout** folder, then expand the **Themes** folder.
3. Right-click on the desired theme to open the drop-down menu.
4. Select **Toggle Accessibility Mode**.

Note that you can also go to the theme properties and check the Accessibility Enabled Theme property (see Theme Properties on page 81 for more information).

Now, when the theme is used for a survey, that survey will use the accessibility functionality. Note that the progress bar and the navigation controls have separate settings such that they can be presented in Accessibility format for any theme, or can be presented in standard format even when the theme is Accessibility enabled (see Survey Layout Component Properties on page 79 for more information).

In the event you wish to deactivate the Accessibility functionality, repeat the toggling procedure. The (ACC.) notation is removed.

Note: When a theme is Accessibility-activated, page titles are set from the default survey title or the theme title.

3.13.3.2. Controlling and Switching Between Modes

If your survey has themes in both the accessible and non-accessible modes, you can use the following mechanisms to control which mode is to be active for a respondent:

- Add the modifier __**acc=1** to the survey URL (note the double underline character to start).
- Set __**acc** as a background (hidden) variable (see Use of Background Variables on page 541 for more information).
- Set an "enabled" theme to be used by the survey. All receiving the survey will then see the "enabled" version.
- Use the script function **SetAccessibleMode(true/false)** as appropriate. This method can be used to convert a survey to "enabled" based on the answer to a particular question

When switching between modes, the following rules apply:

- When the mode is switched to Accessible, the default theme is selected if that is Accessible. If the default is non-Accessible, the first Accessible theme in the list will be used. If no theme is Accessible, the mode will not be switched.
- When the mode is switched to non-Accessible, the default theme will be used if that is non-Accessible. If the default theme is Accessible, the first non-Accessible theme in the list will be used. If no theme is non-Accessible, the mode will not be switched.

3.13.4. Features Not Supported in Accessible Mode

A number of "standard" Confirmit features are not supported in the Accessible mode.

In the event some features that are not supported in the Accessible mode have been used in the survey, if one or more of the themes in the survey are set to **Accessible**, then warnings will be displayed when the survey is launched. This is to bring to your attention the fact that the survey will not function correctly if the Accessible mode is used. If all themes are Accessible and some non-supported features have been used, then the launch will abort with errors instead of warnings.

The following features are not supported in the Accessible mode:

- Answer groups
- Bottom headers
- Dynamic questions
- Repeating headers
- Right-texts for grids
- Scale groups
- Show scale bars
- 3d grids

3.13.5. 508 Compliance

As with any other regulation and standard, Accessibility is open for interpretation. In the context of questionnaires, it is what the standard says regarding forms on web pages that is most relevant.

Any Confirmit survey will consist of a system-generated part and a user-generated part. The system-generated part is the HTML, scripts and styles (CSS) that Confirmit generates; the user-generated part is the question texts and labels, and also any custom HTML, scripts and styles users insert into their surveys.

We have ensured that Confirmit surveys adhere to the Web Accessibility guidelines from WAI (the Web Accessibility Initiative) level 3 (triple A), which means the survey is 508 compliant for system generated code when accessibility rendering is used.

Important
It is up to users - you - to ensure that user generated content is compliant. Confirmit provides some advice according to best practice, such as for example keeping form labels short, but the guidelines are not specific on length. And Confirmit are not accessibility experts, so we cannot make such assessments for our clients. Confirmit has relied on external expertise to advise us in this area to ensure compliance of the system-generated code, and we recommend that our clients do the same as necessary for the user-generated items if you do not have in-house expertise or defined standards.

4. Home

This section describes the functionality accessed under the **Home** menu.

4.1. Home Page

The Home page of the application indicates some natural starting points for your session.

Note: Some of the items in the picture below may not be displayed in your menu as they are Add-ons and may be subject to payment.

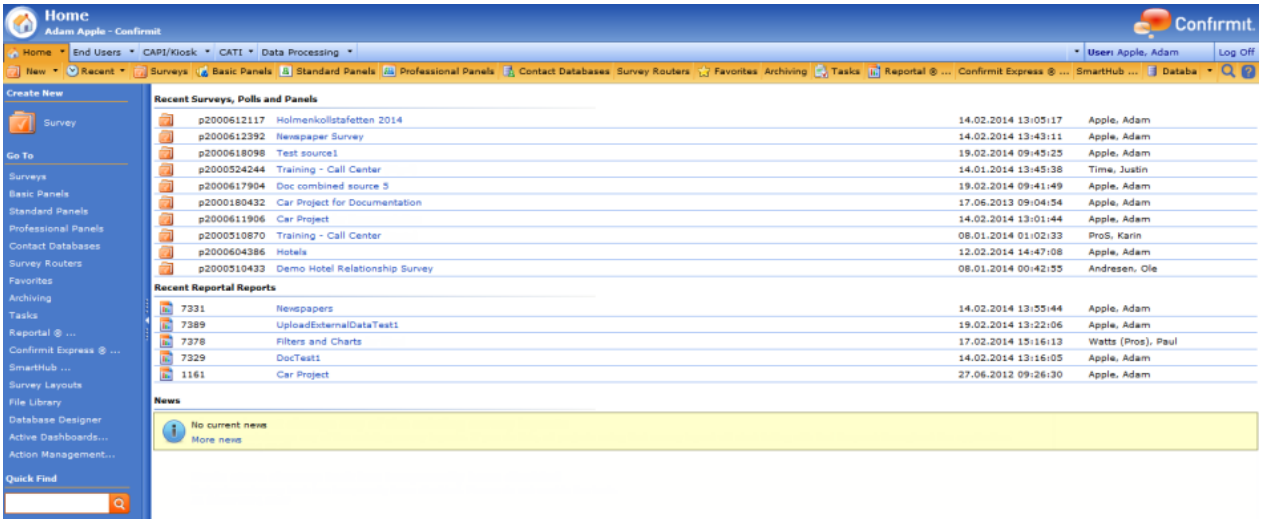


Figure 41 Example of a Professional user's Home page

Standard users are presented with a simplified GUI.

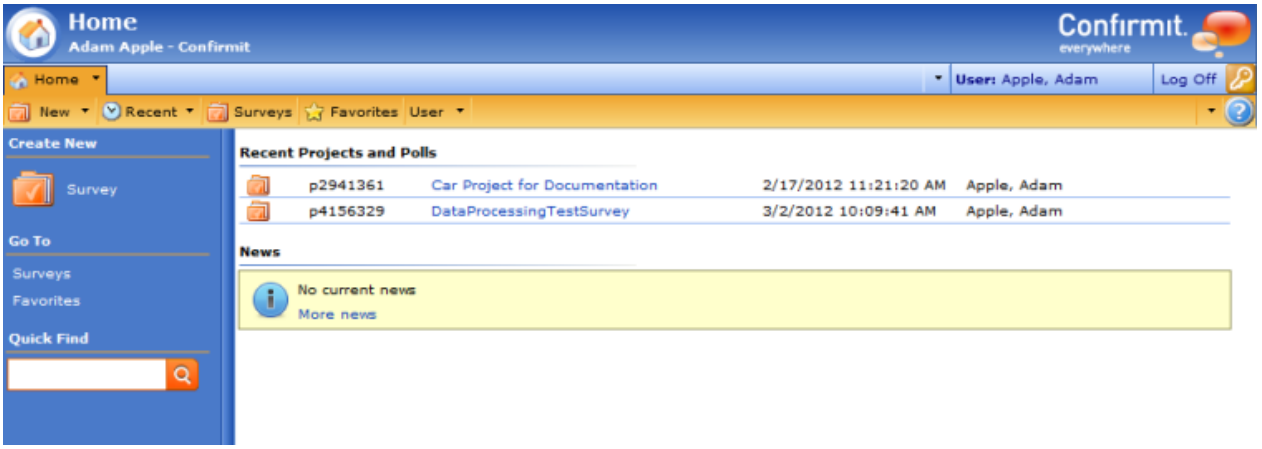


Figure 42 Example of a Standard user's Home page

- The 10 last surveys with which you have been working are displayed under **Recent Surveys, Polls and Panels**.

- The 10 last Reportal reports that you have accessed are displayed under **Recent Reportal Reports**. Click a report link to start Reportal and open the report in edit mode.
- In **News**, the latest news related to the current server is posted. The page is divided into six separate categories. The most recent changes are to be found on top. The lists are searchable. Click the subject links or the red arrows for details.

Note: On-Premise clients will post news related to their servers.

4.2. New

The **New** menu enables you to create surveys, Basic, Standard and Professional Panels, Survey Routers, Schema, Polls and Survey Layouts.

Note: Some of the items in the menu shown below may not be available in your menu depending on your user level, or because they are Add-ons and will be subject to payment.

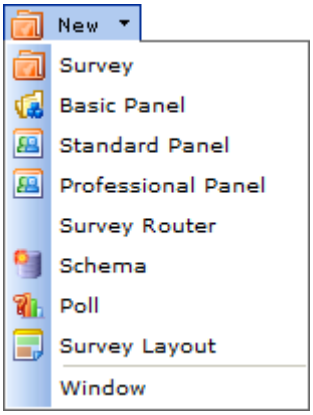


Figure 43 The New menu

You can also create new surveys by clicking the **Survey** button in the Quick Access pane.

4.3. Recent

Go to **Home > Recent** to display the 10 most recently accessed surveys and panels in a drop-down list. Click on the desired survey or panel to open it.

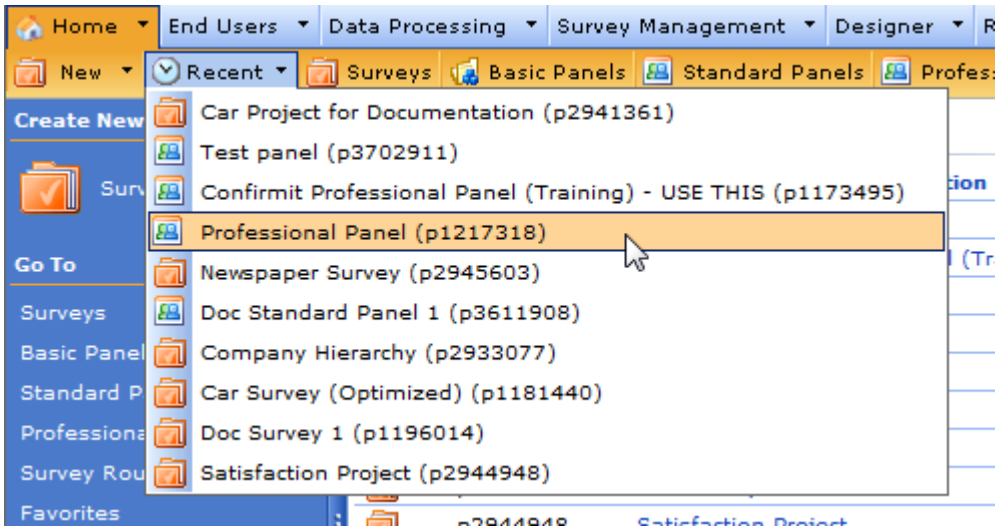


Figure 44 Example of the Recent menu

4.4. Surveys

Go to **Home > Surveys** to display a list of your surveys and the surveys to which you have been granted access by other Confirmit users. Click the blue **Survey ID** link for the desired item to open it (see Search Lists on page 40 for more information).

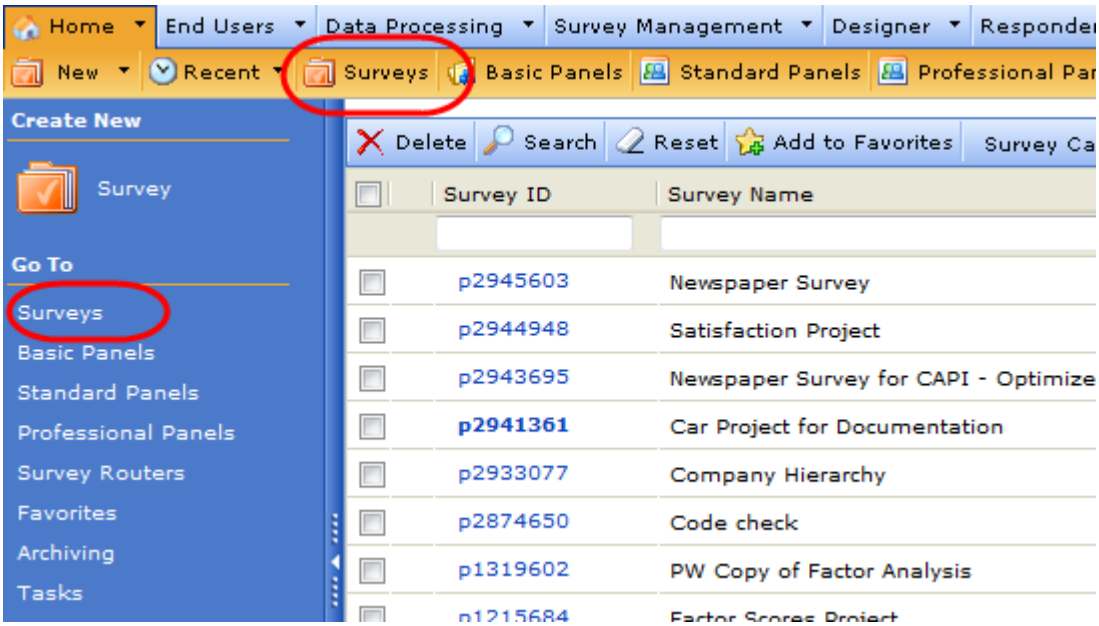


Figure 45 Accessing the Home > Surveys page

4.5. Basic Panels

Go to **Home > Basic Panels** to display a list of your panels and the panels to which you have been granted access by other Confirmit users (see Basic Panels on page 586 for more information).

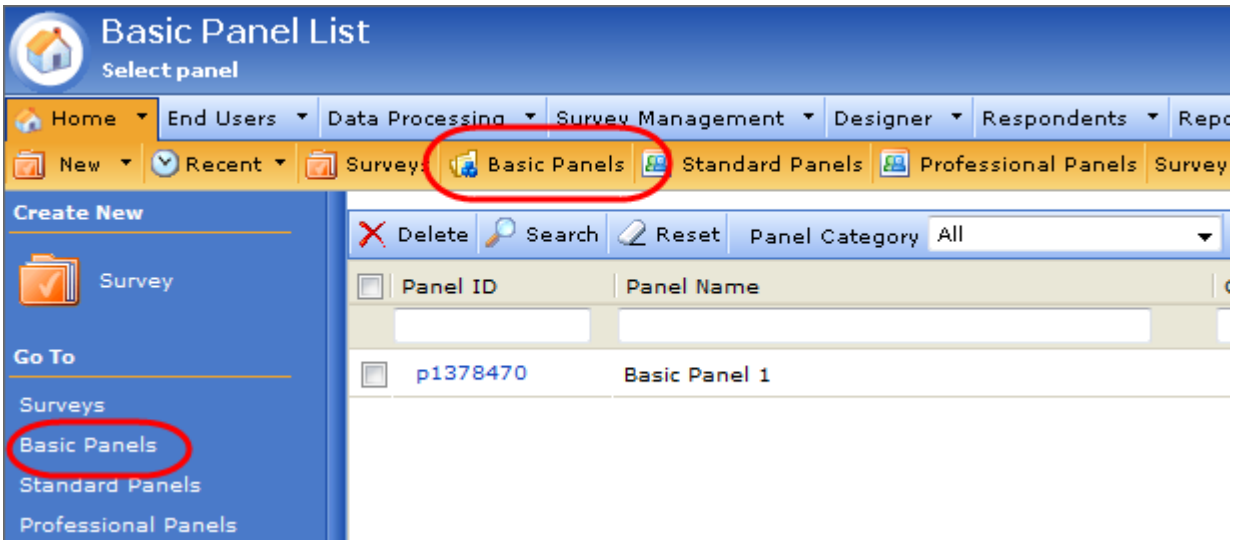


Figure 46 The Home > Basic Panels menu commands

Note: Standard users do not have access to Basic Panels.

4.6. Professional Panels

Note: Professional Panels is an add-on function and is subject to a separate license agreement. If your company has not purchased the required license then this functionality will not be available to you.

Go to **Home > Professional Panels** to display a list of your panels and the panels to which you have been granted access by other users. Click the blue Panel ID link for the desired item to open it. For more information concerning Professional Panels, refer to the separate Professional Panels documentation.

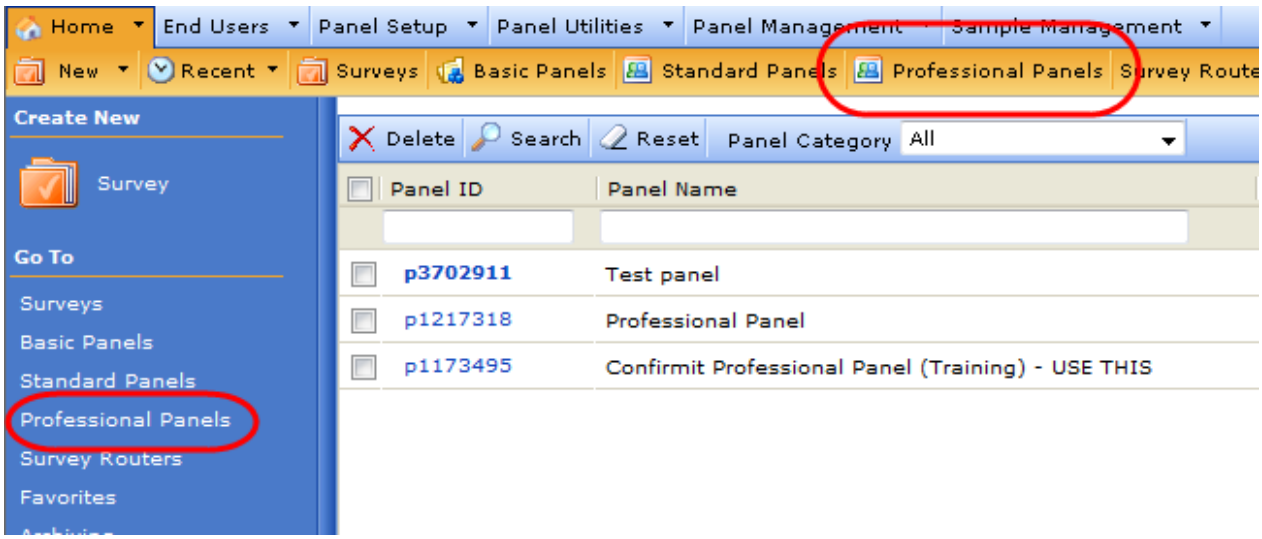


Figure 47 Accessing the Home > Professional Panels page

4.7. Favorites

Here you can shortlist up to 50 surveys for quick access. These surveys will also be available in the ordinary survey list or panel list. To add a survey to your Favorites list:

1. Go to the Survey list.
2. Right-click on the survey and select **Add to Favorites** from the menu (see Search Lists on page 40 for more information).

Or

3. Click on the checkbox beside the survey you wish to add to the Favorites list to select it.
4. Click **Add to Favorites**.

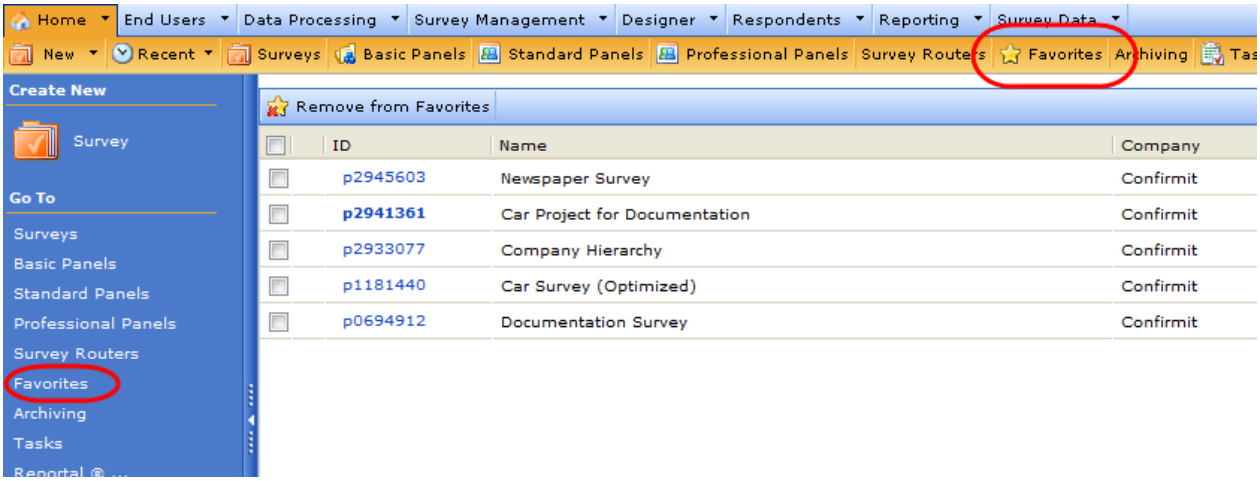


Figure 48 Selecting the Home > Favorites page

To remove a survey from the Favorites list, check the box beside the survey and click **Remove from Favorites**.

4.8. Archiving

The Archiving functionality automatically moves surveys that are inactive (no editing, respondent or associated report activity in a preset time period - default 60 days) into storage. This is done to increase space and reduce the load on the server. Prior to archiving, the survey owner and any other people who have been designated will be sent an email informing them that the survey will be archived, giving them time to delete unwanted surveys, define a new archiving date or place a “do not archive” flag on the survey as necessary. The system administrator can specify after how many days without any activity a survey is to be archived, and how many days prior to archiving the warning email is to be sent.

This functionality requires a setting to be made in the server and the appropriate user permissions must be set; you may therefore not have access to this functionality. Users who have only *Read* permission are not able to modify any data in the Archiving list. For further information, contact your system administrator.

A user can restore archived surveys for which he/she previously was the survey owner, and a company or system administrator can restore any surveys in the system(s) for which he/she is responsible (see Restoring an Archived Survey on page 53 for more information). The Confirmit Administrator Guide contains additional information.

Note that due to the practical challenges involved with testing new versions of Confirmit against old surveys, the Project Restore functionality is only supported for projects that have been launched in one of the latest three versions of Confirmit. It will normally be possible to restore older projects, but Confirmit cannot guarantee this.

Note: For multimode surveys, the multimode portion of the survey (CATI call queue, call history and CAPI productivity statistics etc...) will not be archived. These parts will just be deleted.

Note: A project will not necessarily be archived on the Expiry date (User or System); it will be archived the next time the Archiving task is run after the Expiry date is reached.

Note: When a Reportal report is viewed, the date and time that it was accessed is stored. For the survey that the report is based on, the date/time is checked when the survey is evaluated for archiving. This ensures that surveys which have active reports that have been viewed recently are not archived, irrespective of any editing or interviewing activity.

4.8.1. The Archiving Details Page

Go to the **Home > Archiving** menu command to display a list of the surveys to which you have access .

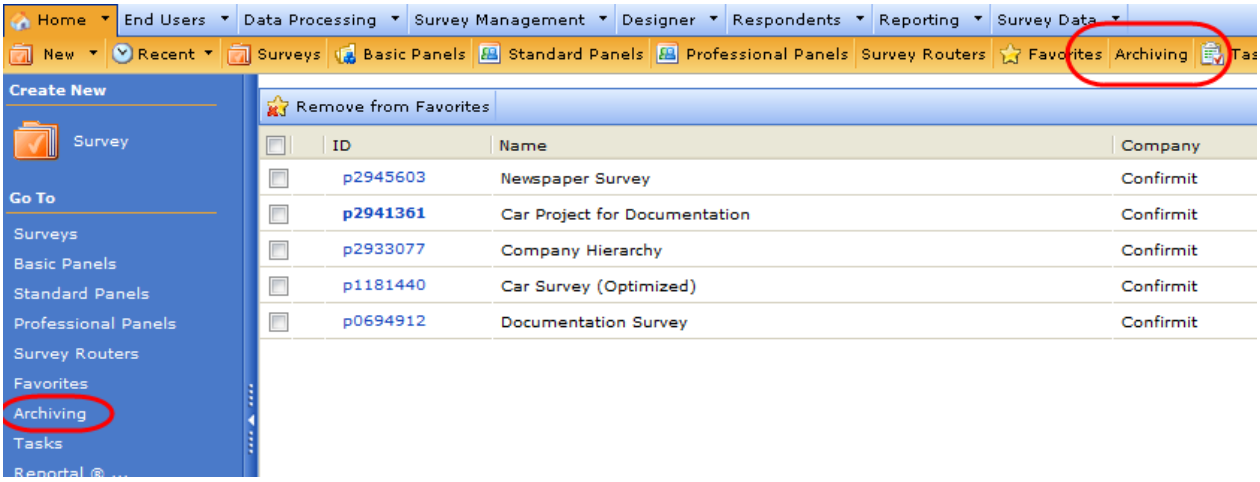


Figure 49 Accessing the Archiving list

As a normal user you can only view surveys for which you are the owner (administrators will see all surveys on the server). The search functionality in this list is similar to that for the survey list.

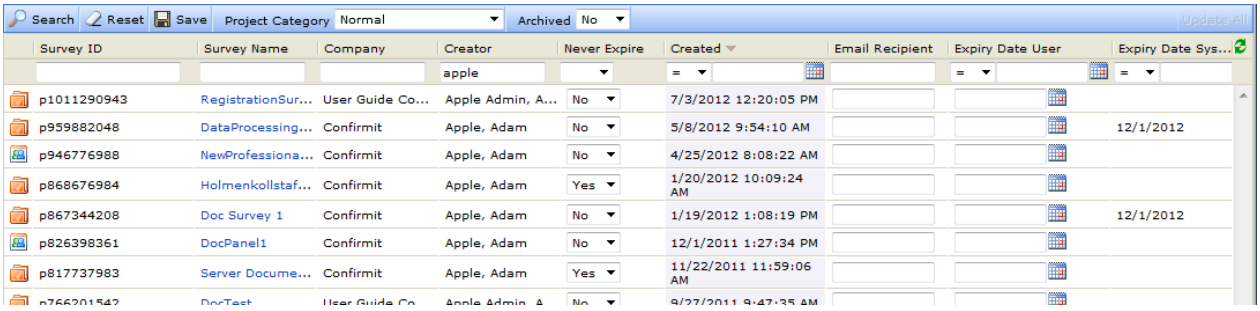


Figure 50 Example of the Survey List as displayed by the Archiving functionality

To search for specific surveys, enter values into the fields in the *Search* row, and click the **Search** button. The page is then refreshed, and will display surveys according to the search criteria. The criteria will remain in the *Search* row. The *Expiry Date* criteria searches for surveys expiring on the selected date.

Note: The *Archived* drop-down defaults to No, so initially, only surveys that have not yet been archived will be listed. To search for surveys that have been archived, change the value in the *Archived* drop-down to Yes and click the Search button.

The same search criteria are available for archived surveys.

If you are the survey owner or an administrator, you can set an archive date manually or you can set the survey such that it is never archived:

1. In the Archive Survey list, find the relevant survey.
2. As required, set the Expiry Date User to the date on which you want the survey to be archived or set the Never Expire property to **Yes**.
3. Click **Save** to save the changes.

Note: If you do not have permission to archive surveys, the Save button will not be accessible.

A project will not necessarily be archived on the Expiry date (User or System); it will be archived the next time the Archiving task is run after the Expiry date is reached.

4.8.2. Restoring an Archived Survey

In the event you find you need a survey that has previously been archived, you can restore that survey to your Survey List.

1. Go to the **Home > Archive** menu item.
2. Set Archived = "Yes" and click **Search**.

   All archived surveys for which you are the owner are listed.
3. Find the survey you wish to restore, and click the **Restore** link beside its Survey ID.

   The Restore Archived Project confirmation dialog appears.
4. Add any comments and click **OK**.

When a survey is restored it will be given the original Survey ID number, the survey link will be the same as it was before the survey was archived, and the "Owner" of the project will be set to the original owner if that user still exists or the restoring user in the event the original owner is no longer registered in the company. The restored survey will have the status Closed, so you must set the survey back to Production mode and re-launch it before it will be accessible to respondents again.

Note: The restore task will only get back the questionnaire and the survey database. All other objects, such as tasks, data templates, Rapid Result, Reportal reports, data processing rules etc must be re-generated if needed.

Due to the practical challenges involved with testing new versions of Confirmit against old surveys, the Project Restore functionality is only supported for surveys that have been launched in one of the latest three versions of Confirmit. It will normally be possible to restore older surveys, but Confirmit cannot guarantee this.

4.8.3. Archiving Questions and Answers

Below are some common questions regarding archiving, and the appropriate answers:

- What does archiving mean for you?

  Surveys that have been inactive (no editing or respondent activity) for 60 days on the Confirmit SaaS site will be archived. Survey creators will receive an email notification 30 days prior to the archiving procedure, and thus have the possibility to either set a new Archiving date (Expiry Date User) or set the survey to Never Expire on the Archiving page in Confirmit (**Home > Archiving** menu), which means that the survey will never be archived. Survey creators will also receive a confirmation email when the survey has been archived.

  If you receive an Archiving email notification for a survey that you do not need to keep for the future, we suggest you delete the survey before it is archived.

  If the survey creator is no longer employed in the company, to avoid notifications being missed there is a 'Recipients of Archiving notification e-mails' field in Confirmit. The address(es) specified in this field will receive all archive emails (both notification and archive success messages). Your company's Designated Support Contact(s) will be added to this field by us. Confirmit Software Company Administrators (a role some users in your company may have) can update this field with other email addresses.

Surveys that have been archived can easily be restored via a 'Restore' link on the Archiving page.

- What is included when my survey is archived?

  The survey's archive package includes survey definition and SQL database. Reports are not archived.

- Are reports ever archived?

  No. The survey's archive package includes survey definition and SQL database.

- What happens to a report when the survey (datasource) is archived?

  Reports are not archived. The project's archive package includes the survey definition and the SQL database. What happens to a report depends on whether the report has single or multiple datasources:

  - If your Confirmit server Administrator has enabled the Database Cleanup task, a report with a single datasource is soft-deleted a preset number of days after the survey is archived. For SaaS users in the Confirmit servers this is set to 14 days. For On-Premise users, your system administrator can adjust the system setting DaysToKeepSurveyDatabasesForDeletedProjects as required. Soft-deleted reports can be restored from the **Home > Deleted Reports** page in Reportal. If the cleanup task is not enabled then reports for archived projects will not be deleted.
  - A report with multiple datasources will not be deleted.

  Confirmit recommends using the **Export > Export Report Definition** functionality in Reportal if you need to keep the Report Definition for a report connected to a project which is going to be archived.

- What if I no longer need the survey?

  Delete surveys that do not need to be archived. You can do this from your Survey List. If you do not delete, the survey will still take up storage capacity even after it is archived.

- Why are so many emails sent?

  Every survey will get one archiving notification email, and an email when it is archived. Upon activation of archiving, a number of emails will be sent at the same time. Thereafter you will only get email whenever a survey meets the criteria for archiving.

- Who receives Archiving notification emails?

  The Survey creator, and email recipient(s) defined in Confirmit Company settings ("Recipients of Archiving notification e-mails" on the Other tab)

- When I receive an Archiving notification email, must I take any action?

  Your surveys will not be archived if they are active, so in that case no action is required. "Active" is defined below.

- I don't want my survey to be archived, what must I do?

  Set your survey to "Never expire" in the Archiving section in Confirmit. Surveys with categories Template, Benchmark or Library will never be archived.

- Why did I get an Archiving notification for my active survey?

  Your survey was marked for archiving as it did not have any activity (as defined below) within the last X days (Delay Days). The notification will be sent X days (Notification Days) before archiving.

- I just received an Archiving notification email. When will my survey be archived?

  If your survey receives no further activity (survey responses) it will be archived X days (Notification Days) after you received the notification. Note that if activity is registered for a survey, the System Expiry date will be reset and moved forward by X days (Delay Days).

- What is an active survey?

  Activity on a survey consists of respondent activity such as Completes, Incompletes and Screened within the last X days (Delay Days). Surveys with active reports (defined below) or that have had data imported through rules or custom applications within the last X days (Delay Days) are also considered active. Surveys with recurring tasks will be archived.

- What is an active Report?

  An active report is a report that has been viewed in the last X days (Delay Days). The "last viewed" timestamp will be updated when the report is opened in view mode by any user. This includes surveys used in multi data-source reports.

- What happens when a panel-linked survey is archived?

  A member of a panel will have a list of "surveys yet not taken" available to him from the survey overview page. When the survey is archived, the survey will be hidden from the survey overview page.

- How do I restore an Archived survey / Un-archive a survey?

  Go to the Archiving section in Confirmit, filter to show Archived surveys, find your Archived survey and click **Restore**.

- For how long can I restore my survey after it's been archived?

  Archived surveys are retained on disk until permanently deleted by system administrators.

Note: Due to the practical challenges involved with testing new versions of Confirmit against old surveys, the Project Restore functionality is only supported for surveys that have been launched in one of the latest three versions of Confirmit. It will normally be possible to restore older surveys, but Confirmit cannot guarantee this.

4.9. Tasks

Note: Standard users do not have access to the Task functionality.

The Task management functionality allows you to track the status of your Confirmit batch jobs, including MS PowerPoint exports, SPSS exports etc.

When placing requests for exports (for example SPSS), you can specify a time for when the task is to be started: Immediately, at midnight or at a specified hour.

To open the task management page, go to the **Home > Tasks** menu command or click the **Tasks** button in the Home toolbar.

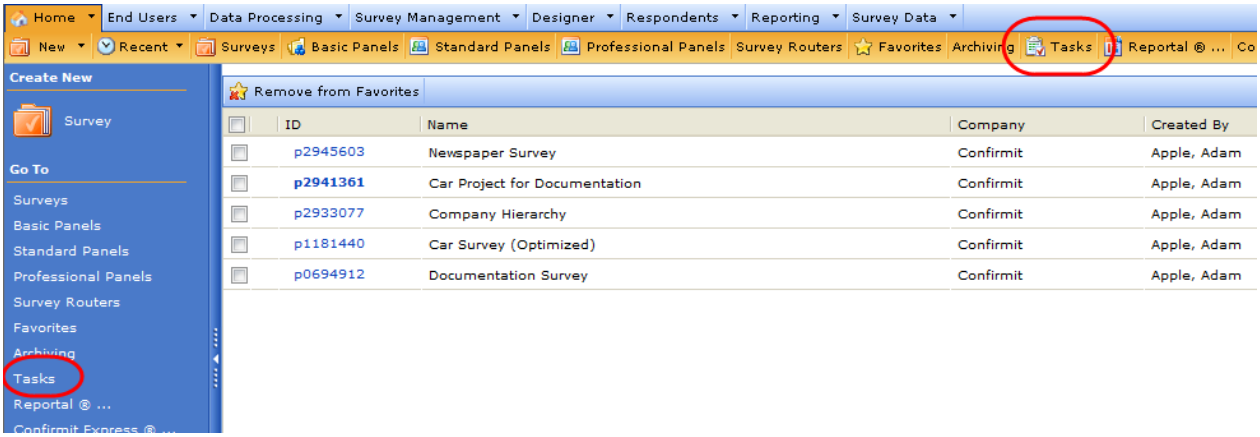


Figure 51 Opening the Tasks page

The Tasks page has six tabs:

- **Scheduled –** A list of the user's pending tasks (see The Tasks Scheduled Tab on page 56 for more information).
- **Executing –** Task currently being run on the batch server (see The Tasks Executing Tab on page 57 for more information).

- **Completed –** Tasks that did finish within the specified timeframe (see The Tasks Completed Tab on page 57 for more information).
- **Aborted –** Tasks that for some reason did not finish within the specified timeframe (see The Aborted Tasks Tab on page 58 for more information).
- **Recurring –** Tasks that have been scheduled to recur at specified time intervals (see The Recurring Tasks Tab on page 58 for more information).
- **Search –** Here you can search for your batch job to check its status (see Searching in the Task Pane on page 59 for more information).

Click on the **Task ID** number in a list to go to the Task Properties overview (see The Task Properties Page on page 60 for more information). Here is displayed information about the particular job such as the job definition, recurrence settings, parameters and the status. To edit the Recurrence pattern for the job, click the **Change** button on the Recurrence tab (see The Task Properties Recurrence Tab on page 60 for more information).

For Completed and Aborted tasks, only the tasks run during the past 7 days will be shown. Completed and Aborted tasks that are older than 7 days are deleted.

Note: Confirmit Horizons sets a limit on the time a task can run before it is aborted. This is to avoid unnecessary strain on the server if there is an error in the file. However, this may also result in heavy tasks (for example based on long questionnaires) being stopped before they are completed. In the event this becomes a problem:
On-Premise users - you can ask your Confirmit administrator to adjust the time limitation.
SaaS users - contact Confirmit Professional Services at support@confirmit.com for assistance with reducing the size of the task.

- You can disable a task while it is being executed (see How to Disable a Scheduled Task on page 59 for more information).
- You can be notified by a popup message on your screen when a task is completed (see Be Notified when a Task is Completed on page 59 for more information).
- Confirmit users who have Administrator permission to a survey will be able to see and search for all batch tasks that have been set up for this survey.

A **Survey Tasks** link is displayed at the bottom of the **General** tab under **Survey Management > Overview**. Click the link to go to the Task Management page. Here are listed all batch tasks for the current survey. When searching for tasks in Task Management, you must always specify the survey number in the Survey ID field. This search parameter can be used in combination with other search parameters to refine the search.

4.9.1. The Tasks Scheduled Tab

This tab lists all the tasks which have not yet been run, that are scheduled for all the surveys to which you have access.

To access this tab, go to the **Home > Tasks** menu command or click the **Tasks** button in the **Home** toolbar.

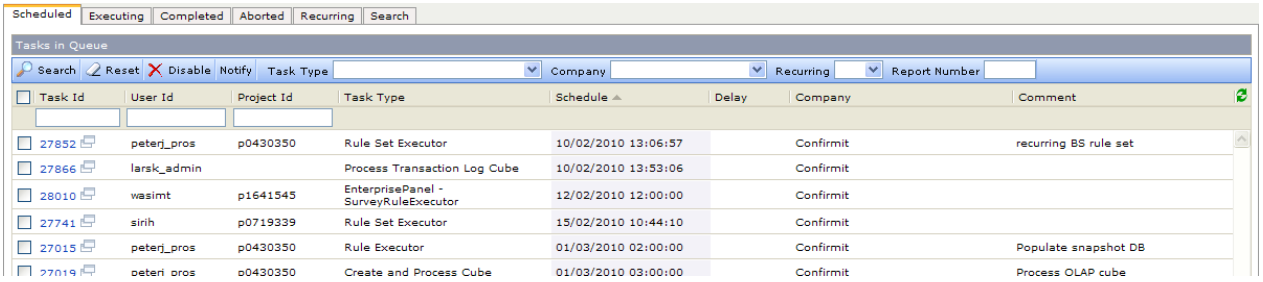


Figure 52 The Tasks Scheduled tab

- The task queue length is given at the top of the pane, along with the number of tasks that are overdue.

- In the event the list is extensive it may cover several pages. In this case, the **Page** arrows in the lower-right corner of the page will be active. Click the arrows to move to other pages. Add search criteria to the various fields above the columns to find the task you are interested in (see Searching in the Task Pane on page 59 for more information). Click **Reset** to remove all input search criteria and display the full list.
- You can disable an unwanted task (see How to Disable a Scheduled Task on page 59 for more information).
- You can be notified by a message popup on your screen when a task is completed (see Be Notified when a Task is Completed on page 59 for more information).

To access a task so you can change its details, click on its blue Task Id link.

4.9.2. The Tasks Executing Tab

This tab lists all the tasks that are currently executing - that is, actually running now.

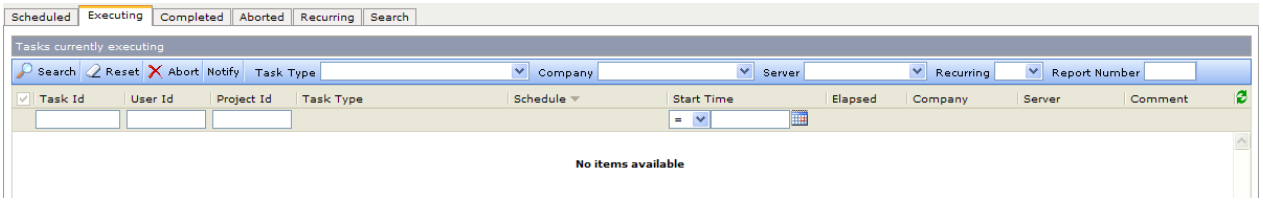


Figure 53 Example of the Tasks Executing tab

- In the event the list is extensive it may cover several pages. In this case, the **Page** arrows in the lower-right corner of the page will be active. Click the arrows to move to other pages. Add search criteria to the various fields above the columns to find the task you are interested in (see Searching in the Task Pane on page 59 for more information). Click **Reset** to remove all input search criteria and display the full list.
- You can Abort an unwanted task (see The Aborted Tasks Tab on page 58 for more information).
- You can be notified by a message popup on your screen when a task is completed (see Be Notified when a Task is Completed on page 59 for more information).

4.9.3. The Tasks Completed Tab

This tab lists all the tasks that have been completed.

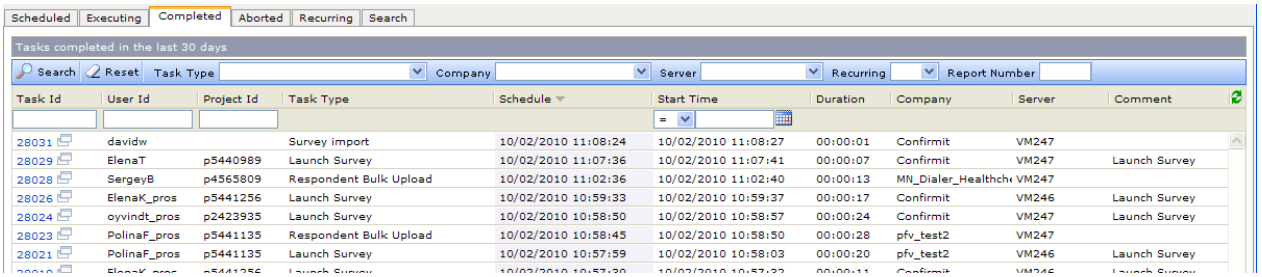


Figure 54 Example of the Task Completed tab

- Click on the blue Task Id link to open the Task Definition dialog. Note that here you can change the task settings, to for example make it recurring, even after the task has run.
- In the event the list is extensive it may cover several pages. In this case, the **Page** arrows in the lower-right corner of the page will be active. Click the arrows to move to other pages. Add search criteria to the various fields above the columns to find the task you are interested in (see Searching in the Task Pane on page 59 for more information). Click **Reset** to remove all input search criteria and display the full list.

4.9.4. The Aborted Tasks Tab

This tab lists all the tasks that have been aborted while they were running.

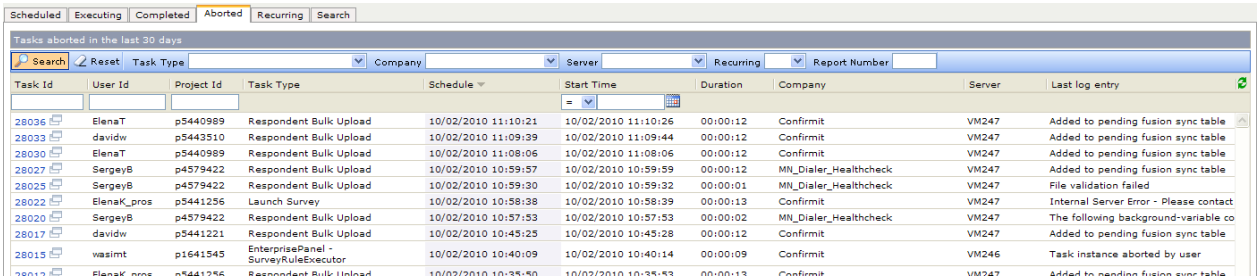


Figure 55 Example of the Tasks Aborted tab

- In the event the list is extensive it may cover several pages. In this case, the **Page** arrows in the lower-right corner of the page will be active. Click the arrows to move to other pages. Add search criteria to the various fields above the columns to find the task you are interested in (see Searching in the Task Pane on page 59 for more information). Click **Reset** to remove all input search criteria and display the full list.

Note: If the task owner's access permission has expired or has been deleted, then the task will abort. An administrator can change the task's owner (see How to Change the Task Owner on page 64 for more information).

4.9.5. The Recurring Tasks Tab

This tab lists all the tasks that are set to reoccur.

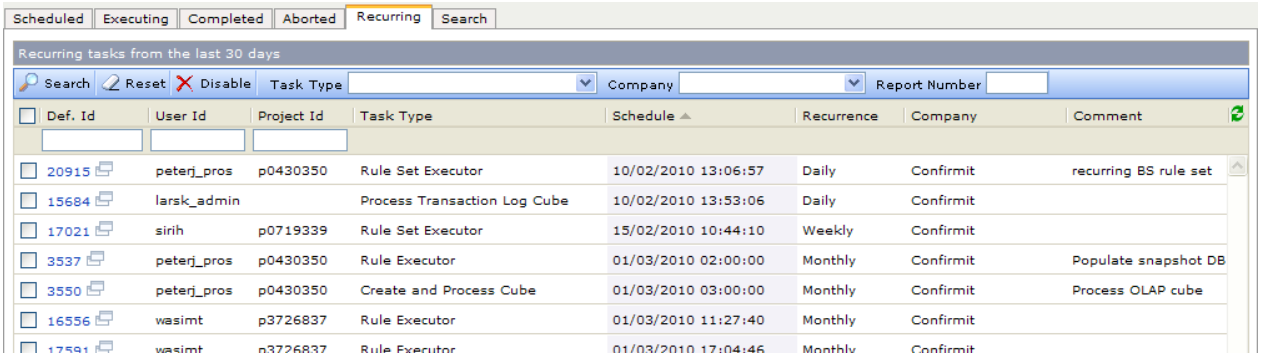


Figure 56 Example of the Tasks Recurring tab

- Click a blue Task Id link to open the Task Properties dialog for that task. In this dialog you can change the details of the task (see The Task Properties Page on page 60 for more information)
- You can Disable an unwanted task (see How to Disable a Scheduled Task on page 59 for more information).
- In the event the list is extensive it may cover several pages. In this case, the **Page** arrows in the lower-right corner of the page will be active. Click the arrows to move to other pages. Add search criteria to the various fields above the columns to find the task you are interested in (see Searching in the Task Pane on page 59 for more information). Click **Reset** to remove all input search criteria and display the full list.

Note: You can select to receive a notification email when a recurring task has run for the last time. Enable/disable the Final Recurring Task Completed option in the User Settings overlay (click your User Name in the upper-right corner of the Authoring window).

4.9.6. Searching in the Task Pane

The Search tab lists all the tasks that are associated with the surveys that you have access to (see the figure below for an example). In the event the list is extensive it may cover several pages, and in this case the **Page** arrows in the lower-right corner of the page will be active. Click the arrows to move to other pages. You can reduce the list by selecting a specific task type, company, server, whether or not the task is recurring, a particular period, report number or hub ID. You can also add search criteria to the various fields above the columns to find the task you are interested in.

The search parameters are:

- **Task type -** for example Batch Emailing, Survey Export, Survey Import, Sampling, DB Generator, WI Generator, Archiving, Project Info Collector, Project Info Exporter, etc.
- **Recurring -** you can search for recurring tasks only, for not-recurring tasks, or both types of tasks.
- **Period** - if you know when the task you are interested in was scheduled, select the period here.
- **Report Number -** if you know the report number, you can search for any tasks related to that report.
- **Hub ID -** the ID of the hub to which the task is associated.
- **Task Id** - the ID number given to the batch job by the system. Click the Task Id to open the Task Definition page.
- **User Id** - if you have several can search for all tasks initiated by a specified user.
- **Project Id -** the system generated project number.
- **Status -** any, in queue, executing, completed, aborted by user, and aborted by system.

Note that administrators have additional search criteria. Type or select the required criteria into the appropriate fields and click **Search**. Click **Reset** to remove all input search criteria and display the full list.

You can sort the list by several of the columns by clicking in the column header.

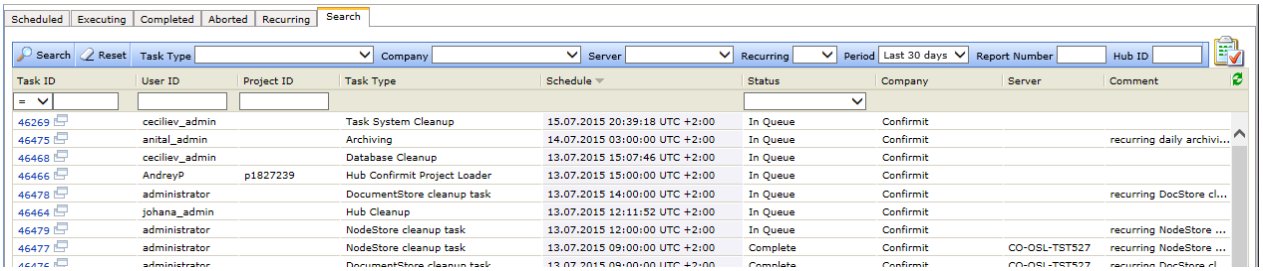


Figure 57 Example of the Task Management pane - Search tab

4.9.7. How to Disable a Scheduled Task

To disable a scheduled task or abort a task that is currently running, tick the checkbox next to the task and click **Disable** (**Abort** in the Executing tab). The task is removed from the list.

4.9.8. Be Notified when a Task is Completed

You can be notified when a selected task is completed, so you can for example continue to work in other applications while the task is running. To activate this, tick the checkbox next to the task and click **Notify**. A message will pop up on your screen when the selected task has been run.

4.9.9. The Task Properties Page

Click on the **Task ID** number in a task list to go to the Task Properties page for that task. A window opens as shown in the example below. Here is displayed information about the particular job such as the job definition, recurrence settings, parameters and the status. The window opens at the Definition tab. This tab contains the settings with which the task was set up. The options available, and their settings, will be different for each type of task, and some will be changeable whilst others will be "read-only". The example below shows the Definition tab for a Survey Launch task; see the Sending Email section for another example.

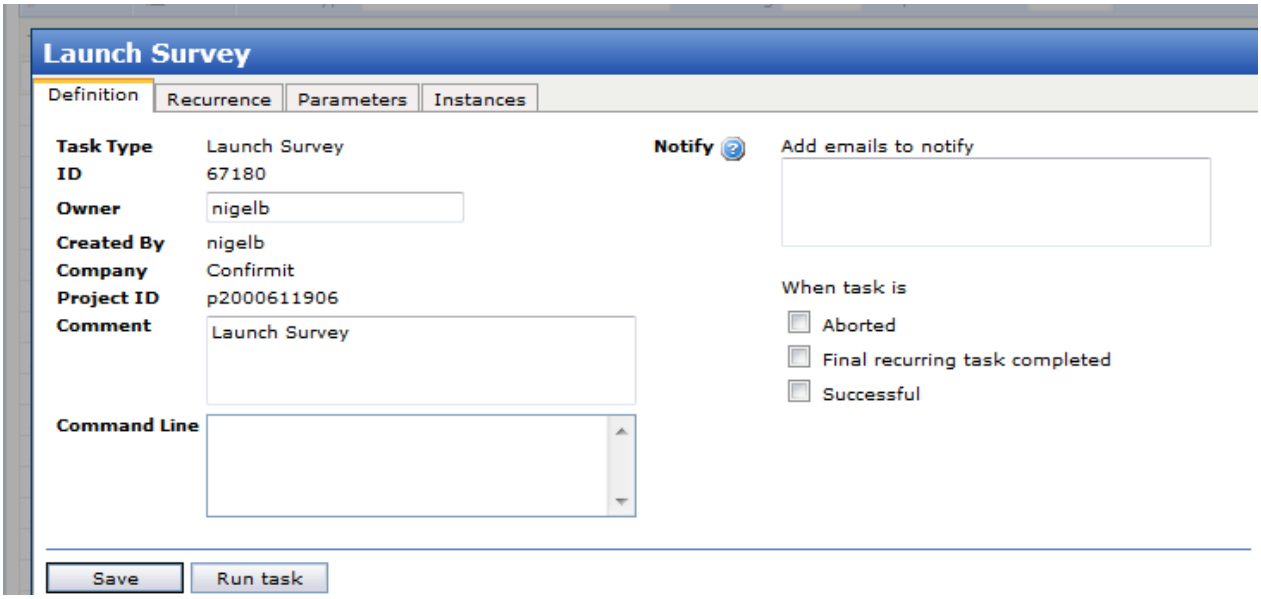


Figure 58 Example of a Task Properties page Definition tab for a Survey Launch task

Note that the information displayed here will depend on the task type.

You can run the selected task once, immediately, by clicking on **Run Task**. A confirmation dialog opens; click **OK** to run, **Cancel** to abort the operation. If the task is set to be recurring, running the task in this way will not disturb the recurrence settings. So if for example your task is set to recur every day at 23.00, if you click **Run Task** at 16.00, the task will run again at 23.00 as planned.

Notification messages for selected tasks will be sent to the email addresses listed. Multiple email addresses can be specified; separate the addresses with a comma or semicolon. Check the boxes for the desired messahes.

- **Aborted –** a message is sent if the task is aborted.
- **Final recurring task completed –** a message is sent when a recurring task is run for the last time.
- **Successful –** a message is sent if the task is successfully completed.

Click the **Close Window** button in the window's lower frame to close the window and return to the search list from which you entered the window.

4.9.9.1. The Task Properties Recurrence Tab

The Recurrence tab shows the initial starting time for the task, and any specified recurrences.

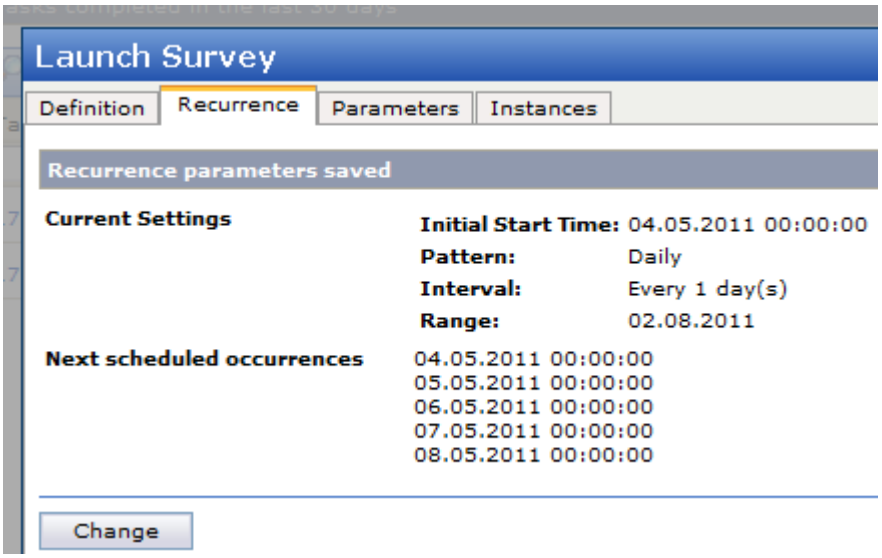


Figure 59 Example of a Task Properties page Recurrence tab

To edit the recurrence setup, click the **Change** button and set Recurring task to **Yes**. The dialog changes to that shown below.

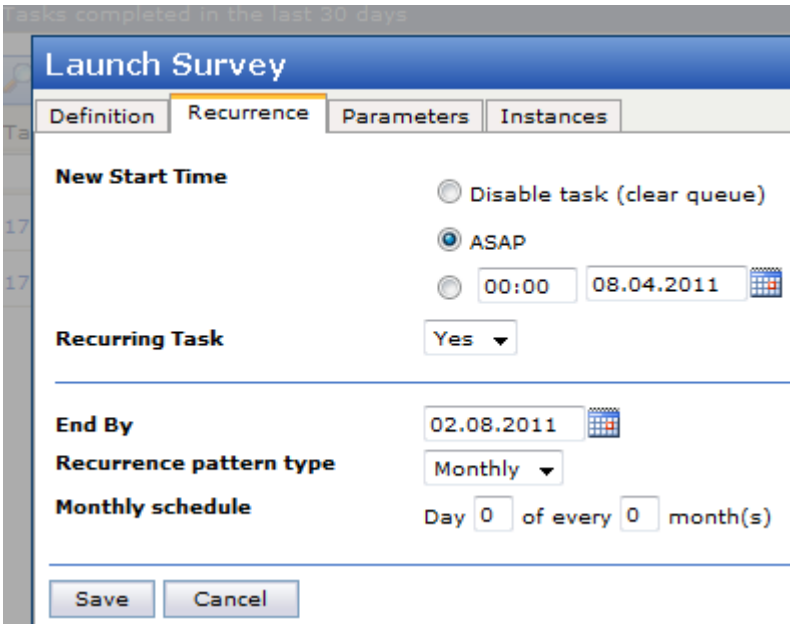


Figure 60 Changing the recurrence setup

1. In the **New Start Time** fields, set the time and date you want the task to be first performed. Note that you can set the time to the nearest minute.
2. In the **End By** field, set the date for the final recurrence. No recurrences of this task will be performed after this date.

Note: The default date set in the End By field is "current date + 3 months". You can change this date as required. When a survey is closed, any recurring tasks still running for that survey will be aborted and disabled the next time they are run. Single tasks will be executed without aborting.

1. In the **Recurrence Pattern Type** field, select the frequency required for the recurrence. The “Schedule” area below changes depending on the selection made here. In this area:

   o For hourly recurrences, type in the rate. For example, if you want the job to be executed every 4 hours, type **4** into the box. The job will then be first executed at the date and time set in the New Start Time fields, then will be repeated every four hours.

   o For daily recurrences, type in the rate. For example, if you want the job to be executed every 3rd day, type **3** into the box. The job will then be first executed at the date and time selected in the New Start Time fields, and will be repeated every third day.

   o For weekly recurrences, type in the rate and select the days of the week on which you want the job to be executed. For example, if you type **2** into the first box and click in the **Monday** and **Friday** boxes to select them, the job will be executed on alternate weeks; the first time on the Monday, the next time on the Friday, the next time on the Monday and so on.

   o For monthly recurrences, type in the day of the month and the rate. For example, if you want the job to be executed on the 10th day of every second month, type **10** into the Day box and **2** into the Month box.

6. Click **Save** to save the settings.

   The Recurrence tab changes to display the settings you have selected, as shown in the example below.

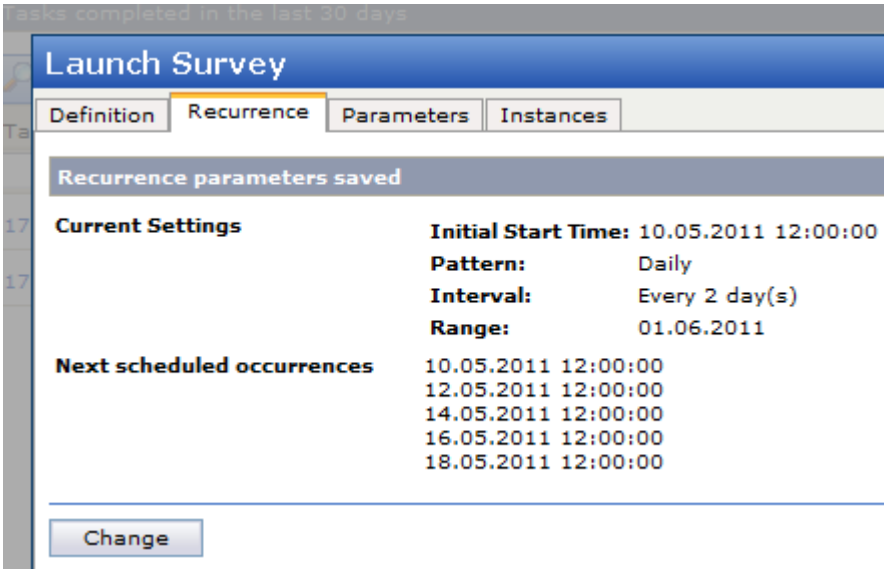


Figure 61 Example of the Recurrence Pattern with a recurrence sequence scheduled

Note: If you go out of the dialog before you save the settings, the settings will revert to their default values. Once you have saved the settings, you can return at any time to change them or halt the task.

4.9.9.2. The Task Properties Parameters Tab

This tab displays parameter information about the task. Note that the parameters listed will depend on the task type.

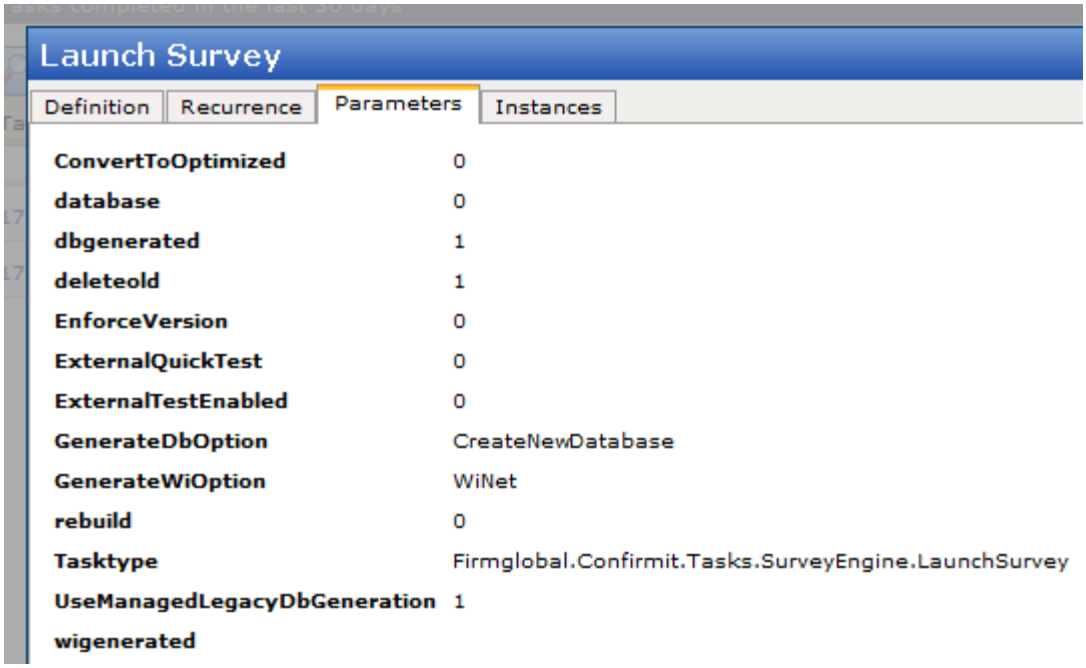


Figure 62 Example of the Task Properties page Parameters tab for a data export task

4.9.9.3. The Task Properties Instances Tab

This tab shows the various instances of the recurring task that have been run, and on first opening, the report for the latest instance. Click on the blue date/time links to view the reports for other instances of the task.

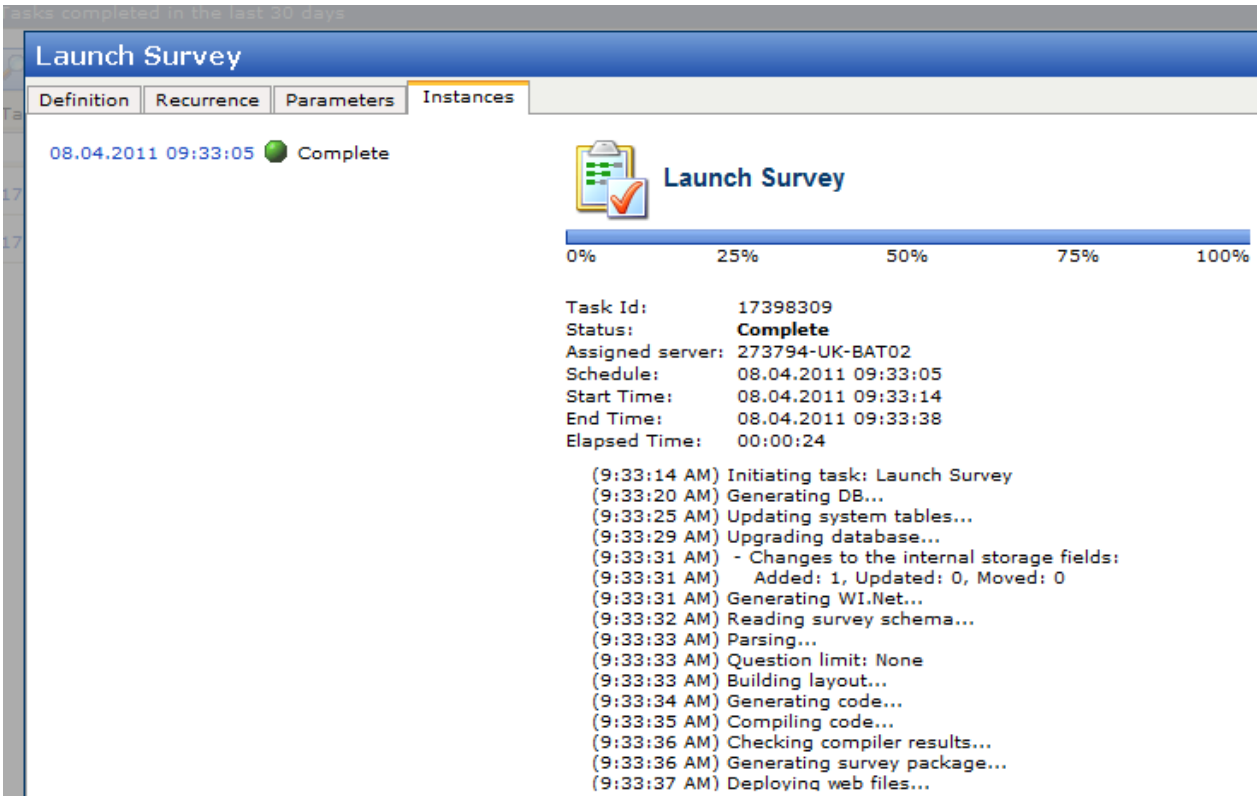


Figure 63 Example of the Task Properties page Instances tab

4.9.9.4. How to Change the Task Owner

All tasks have a specified “owner”; in most cases the user who originally created the task.However, a user’s access permission can expire or be deleted, and if a task previously created by a now-expired/deleted user attempts to run then the task will abort. In this case, the administrator has the option of changing the task’s owner.

Note: To change a task owner, the administrator must have task_admin, system_admin, system_project_admin or project_admin permission. Users with other permissions will not see the Ownership tab.

1. Go to the **Home > Tasks** menu command.

   The Task Management page opens.

2. Select the appropriate task in one of the task list, then go to the Task Definition tab.

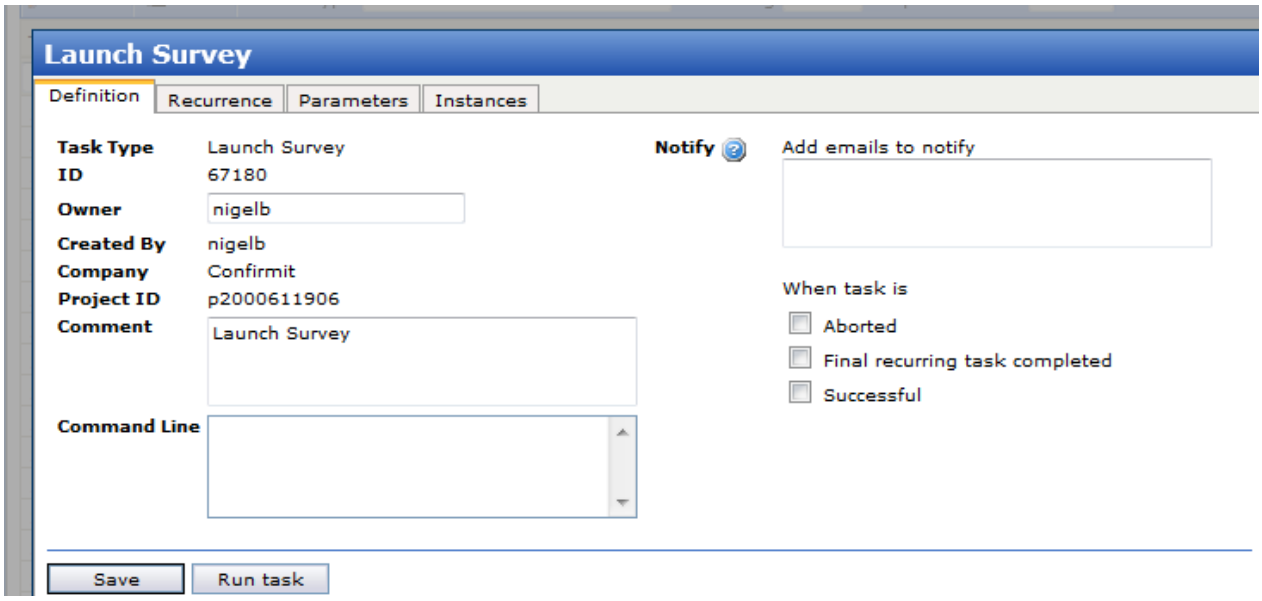


Figure 64 The Definition tab

3. Type into the **Owner** field the UserID of the new task owner and click **Save** to save the changes.

All future occurrences of the task will be run under the new owner's credentials.

4.10. Survey Layouts

Customize the look and feel of your surveys using Survey Layouts. This functionality enables you to design in detail your page and question layout. Three basic types of survey layouts are available:

- **"Standard" survey layouts.**
- **Easy Layouts -** these are simpler, and can be edited visually in Confirmit Express. They contain some specific HTML styles and settings (see How to Create an Easy Layout on page 121 for more information).
- **Responsive layouts -** allows the survey layout to automatically adapt to suit the device the respondent is using to answer the survey (see Responsive Rendering on page 131 for more information).

Note: Standard users do not have access to the Survey Layout functionality; Easy Layouts are available.

Note: Responsive rendering must be switched on for the specific company. Contact your system administrator for details.

4.10.1. Background and Benefits

Survey Layout is built using XHTML version 1.0. XHTML 1.0 is the first step toward a modular and extensible web-based XML (Extensible Markup Language). It is the reformulation of HTML 4 as an application of XML.

Note: You can still use HTML code, since browsers will also render that. However, you will then not benefit from the advantages of using XHTML.

When using XHTML the code is much stricter than with normal HTML. When working with Survey Layouts, Confirmit will automatically create code that conforms to the following:

- The document must be well formed (elements nest properly).
- All tags must be written in lowercase.
- All attributes, even numerical ones, must be quoted.

- All elements must also be closed, including empty elements such as img and br. Do this by adding a closing slash to the start tag: and
.
- Attribute minimization (for example, <option selected>) is prohibited; instead, use <option selected="selected">.

Using Survey Layouts provides many advantages:

- Complete control and full flexibility of look and feel for every interview page.
- Surveys are cross-browser compliant (Opera, Firefox, Safari +++).
- Simpler transition to other modes (for example wireless devices).
- Simpler to switch between different layouts for a survey.
- Dynamic/conditional formatting.
- Better permission control over survey layouts.

4.10.1.1. Extensibility

Under HTML, an SGML (Standard Generalized Markup Language) application, the addition of a new group of elements requires alteration of the entire DTD (language specification). In an XML-based DTD, all that is required is that the new set of elements be internally consistent and well-formed to be added to an existing DTD.

4.10.1.2. Cleaner, More Logical Markup

XHTML brings uniformity to document structure. It delivers a standardized markup that separates display and layout code from syntax, making the creation, maintenance, and analysis of documents much easier for all involved.

4.10.1.3. Increased Portability

Unlike old–style HTML pages, valid, well–formed XHTML documents can easily be “transported” to wireless devices, Braille readers, and other specialized web environments. Moreover, XHTML’s insistence on clean, rule–based markup helps avoiding the kind of errors that can make web pages fail even in traditional browsers such as Microsoft Internet Explorer, Netscape Navigator, and Opera Software’s Opera browser.

4.10.1.4. Greater Accessibility

Well-authored XHTML pages are more accessible than the old-style HTML pages because they follow strict rules and avoid non-standard markup. This helps you to comply with regulations and Web Accessibility guidelines.

The Web Accessibility guidelines are intended to enable people with physical disabilities to use the Web. More specifically, Web accessibility means that people with disabilities can perceive, understand, navigate, and interact with the Web, and that they can contribute to the Web.

Several countries have implemented policies on accessibility, for example United States (section 255 of the Telecommunications Act, Rehabilitation Act: section 504 and section 508, Americans with Disabilities Act (ADA)) and United Kingdom (Disability Discrimination Act).

W3C Web Accessibility Initiative (WAI) works with organizations around the world to develop guidelines and resources to help make the Web accessible to people with disabilities. Read more about this at www.w3.org/WAI. The WAI site includes full guidelines on accessibility (http://www.w3.org/TR/WCAG10) as well as other resources.

Accessibility functionality is available in Horizons Authoring (see The Accessibility Functionality on page 43 for more information).

4.10.1.5. CSS - Cascading Style Sheets

CSS (Cascading Style Sheets) is a standard layout language for the Web - one that controls colors, typography, size and positioning of elements and images. This technology is bandwidth-friendly - a single 10K CSS document can control the appearance of an entire website, comprising thousands of pages and hundreds of megabytes. CSS is intended by its creators (W3C) to replace HTML table-based layouts, frames, and other presentational hacks. CSS (together with other web standards such as XHTML) helps separate style from content, making the Web more accessible, and opening it up to more powerful applications and technologies to come.

Laying out pages using CSS instead of HTML tables (or using CSS simply to replace redundant, non–standard HTML hacks, such as invalid extensions to the <font> tag or the <body> tag) provides the following benefits:

- Conserve bandwidth (less markup for respondents to download).
- Reduce design/development time.
- Reduce updating and maintenance time.
- Increased accessibility (fewer, or no, HTML tables; no invalid junk markup).
- Better, more professional appearance (line–height, borders, padding, margins).
- Increased readability (line–height, borders, padding, margins).

For further information on Cascading Style Sheets, Confirmit suggests that you refer to the official World Wide Web Consortium web site at http://www.w3.org/style/css.

4.10.2. Accessing Survey Layouts

Survey Layouts can be edited in two ways:

- **Globally –** you can work on the *global* version of each Survey Layout. If you make changes to a layout globally, the changes will affect all surveys that use the layout and are re-launched after the changes have been saved.
- **Locally –** the alternative is to work on a Survey Layout on the survey level. Any changes you make at this level will be specific to the survey in which you have made the changes. Note that you can choose to save "local" changes to the global version of the layout).

4.10.2.1. How to Access Global Survey Layouts

To access the global versions of your survey layouts, go to **Survey Layouts** on the **Quick Access Pane**.

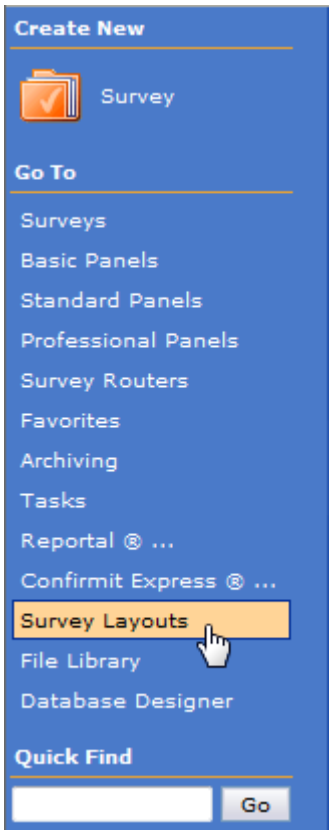


Figure 65 Choose Survey Layouts on the Quick Access Pane

Confirmit displays a list of all the Survey Layouts you have created or others have given you permission to see.

Note: You can also access the global version of a survey layout by clicking Edit Survey Layout when inside a survey. You are then taken directly to the edit mode of the survey layout used by the active survey.

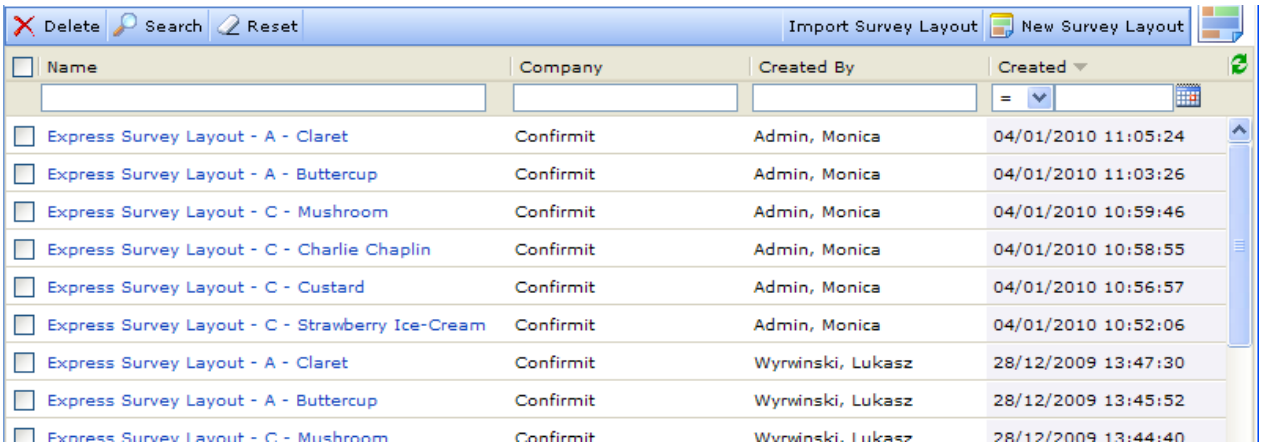


Figure 66 Example of the Survey Layout list

Note: If you are logged on to Confirmit as system / template / global / company administrator, three additional columns will be displayed in the Survey layout list. These show the Public and Company Specific checkbox settings for the layouts listed.

Click on a Name in the list to open that Global Survey Layout.

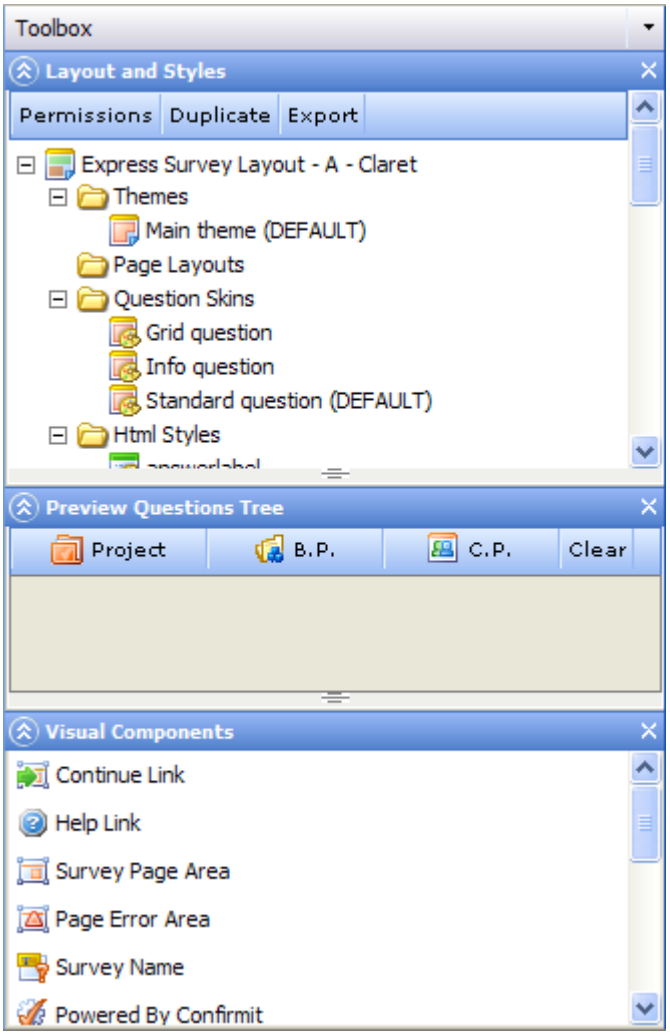


Figure 67 The Toolbox layout for a Global Survey Layout

Note: Click here Go to the Search Lists section for details on List functionality. Note also that you can transfer Survey Layouts from one Confirmit server to another by exporting the layout from the original server and then importing it to the new server.

4.10.2.2. How to Access Local Survey Layouts

Local survey layouts are specific to the individual survey.

When a survey is open, you can specify a survey layout for the survey by going to the **Layout** tab under the **Designer > Survey Settings** menu command (see Survey Settings on page 492 for more information).

If you are creating a new survey, specify the survey layout on the first page of the creation procedure. Once you have chosen a survey layout under **Survey Settings** and saved the setting, the questionnaire tree will automatically refresh and a new folder called **Themes and Skins** is created at the bottom of the tree.

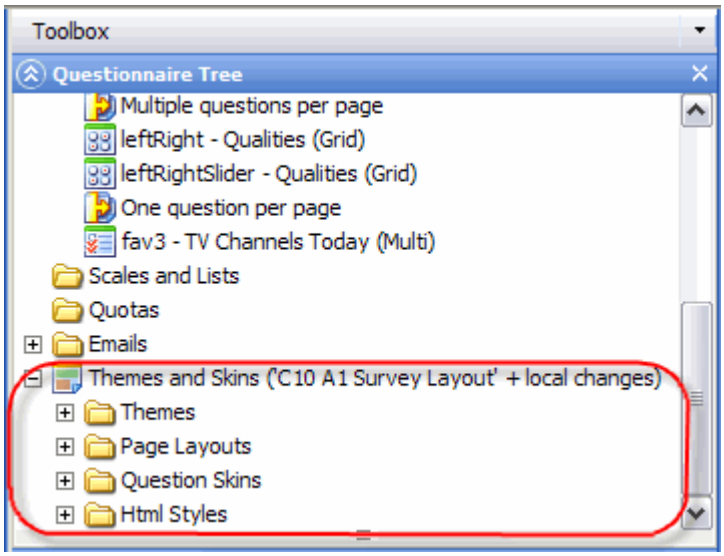


Figure 68 Direct access to Survey Layouts via the Questionnaire Tree

Confirmit indicates next to the **Themes and Skins** folder which global Survey Layout is currently used for the survey (see the figure above). Additions and changes done here are all survey-specific, meaning that no other surveys will be affected by any changes made in this Questionnaire Tree.

4.10.2.3. How to Apply a Local Layout Globally

If you have made changes to themes, page layouts, questions skins, or HTML styles, and you want to copy these changes from the local version to the global version, right-click on the layout or style you want to apply to the global version of the Survey Layout, and select **Apply to Survey Layout**.

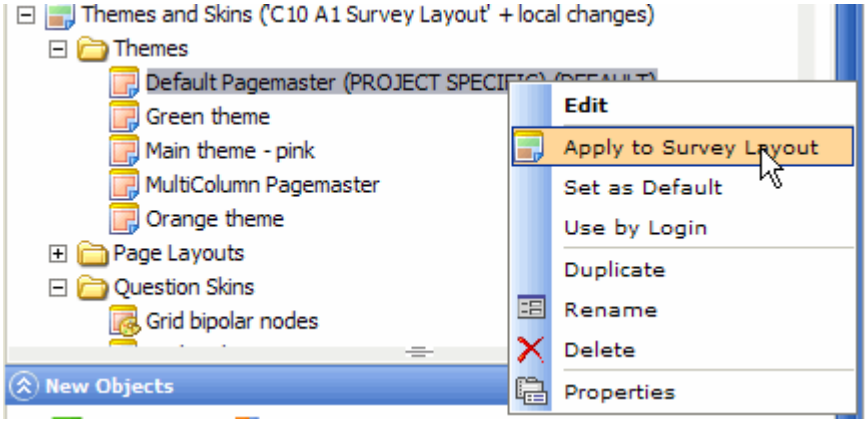


Figure 69 Applying a survey-specific layout to Survey Layout

Be aware that you can at any time right-click on the **Themes and Skins** folder and choose **Apply all changes to SurveyLayout**. This will transfer all survey-specific styles and layouts to the global Layout in one operation.

Note: "Public" survey layouts can be used by anyone logged on to Confirmit, so you will require special access permission to overwrite these. If you do not have this permission, then the Apply to Survey Layout command will not be available to you while you are in a survey that uses a public layout.

4.10.3. How to Create a New Survey Layout

Note: When you first create a new survey layout it will only be available to you. If you wish to make it available to others in your company then you must provide the appropriate levels of access to the individuals concerned via the Permissions tab.

To create a new survey layout:

1. In the **Home** menu bar, got to the **New > Survey Layout** command.

   The New Survey Layout wizard opens at step 1.

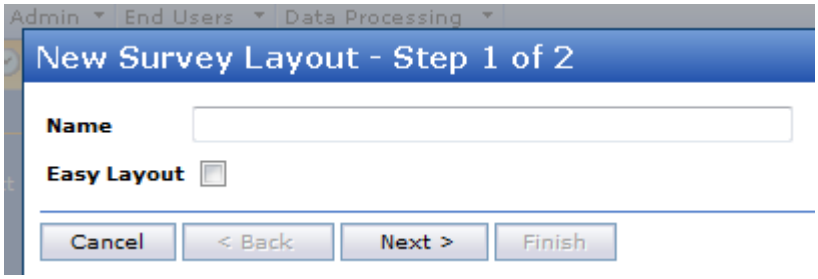


Figure 70 Step 1 of the New Survey Layout wizard

2. Type a name for your new survey layout into the Name field.

   An "Easy Layout" is a subtype of survey layout which can be edited visually in Confirmit Express, and which contains some specific html styles and settings. If you wish to create an Easy Layout, check this box. Then, only survey layouts designated as Easy Layout are displayed in the next step of the wizard. This ensures that the new easy layout will have an existing easy layout as its template, and will therefore inherit the required styles and settings.

3. Check the Easy Layout box if required (see How to Create an Easy Layout on page 121 for more information).

4. Click **Next**.

   The wizard moves to step 2 of the procedure and a list of existing survey layouts opens.

5. In the list, select the survey layout that you wish to use as the template for your new layout.

6. Click **Finish**.

   Your new survey layout is created and added to the Survey Layout List accessed via the **Quick Access menu > Survey Layouts** command. The Toolbox column opens with the Layout and Styles toolbox, containing the tree for your new survey layout.

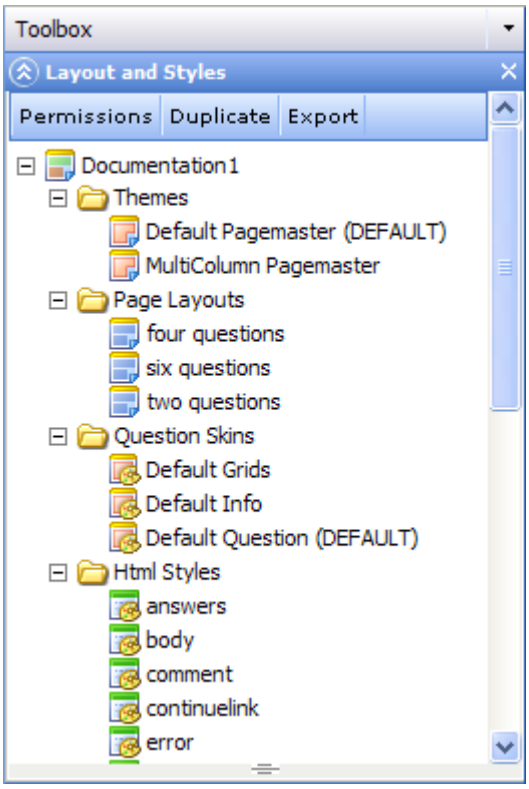


Figure 71 The Layout and Styles toolbox containing your new survey layout

This tree contains the themes, page layouts, question skins and HTML styles copied from the survey layout you used as your template. You can now edit these items as required to develop the survey layout you require.

To create a new theme in the **Themes** folder, right-click on the **Themes** folder and select **Insert Theme** from the menu (see Themes on page 76 for more information). Note that when a new theme is created in a survey layout, the default document type will be set to HTML5.

Once the survey layout is as you require, you can set the access permissions for it for the other users in your company (see Global Survey Layout Permissions on page 72 for more information).

4.10.4. Global Survey Layout Permissions

Global Survey layouts have a Permissions page. To open this, click the **Permissions** button in the Layout and Styles toolbox.

Note: If you do not have permission to change the settings then the options will not be accessible and the lower part of the screen will not be visible.

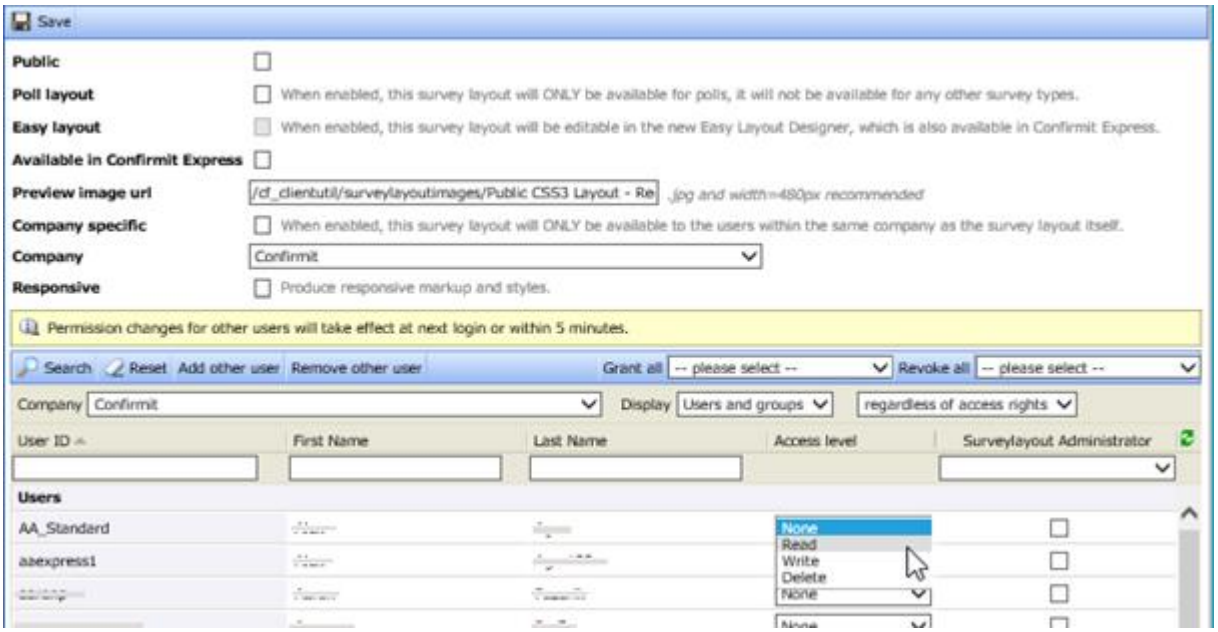


Figure 72 A Global Survey Layout's Permissions page

The Permissions page includes several checkboxes. Note that the availability of these checkboxes will depend on your permission level. For more information on permissions, refer to the Confirmit Administrator manual.

- **Public –** check this box to make the layout available to all users. If a layout is public, then all users will be able to access the layout without being given additional permissions. See also the Company Specific option below.
- **Poll layout -** when checked, the survey layout will only be available for polls (see Poll Surveys on page 335 for more information).
- **Easy Layout -** when checked, the survey layout will be editable in the Easy Layout Designer.
- **Available in Confirmit Express –** check this box to make the layout available to your company's Confirmit Express users. When you check the box, an input field appears enabling you to add a URL to a preview for the Layout. This preview is an illustration showing an Express user how an example question will look if they select this layout. To create the illustration, take a screen-shot of a survey question using the layout, and upload the screen-shot to the Confirmit File Library. Then paste the URL to the uploaded file into the Preview URL field. The screen-shot will then appear in the Express Survey Details page when an Express user selects the layout.
- **Preview image url -** a preview image of an example question using the layout can be displayed in the Survey Layout Preview frame towards the right side of the New Survey page, so a user can see roughly how the survey will look using the selected layout. Create an image of a question that uses the layout, and add the URL to that image here. For best results, the image should be in .jpg format and be 480 px wide.
- **Company Specific –** check this box if you want the layout to be available to all users within your company.

  Note that as you are within a server environment, a Public layout will be available to all users working on your server. SaaS users are therefore not allowed to make a layout Public because the layout would then be available to all SaaS users (all Confirmit's SaaS Environment customers). You can duplicate a public layout (the Public property is then removed from the copy), but not modify one. Only a system administrator can set a layout to be Public. Confirmit ProS Administrators and Company Administrators can set a layout as Public, but only within the company. A normal user can make a layout available in Express but cannot make it Public.
- **Responsive -** check to make the layout use the Responsive Rendering functionality (see Responsive Rendering on page 131 for more information). Note that this functionality must be switched on specifically for your company.
- **Rendering version -** appears when Responsive is selected. When changes are made to the layout, the edited layout is saved as a new version. Select which version of the layout you want your survey to use.

In the lower part of the window, set up permissions for the Survey Layout for users within your company. In the event a large number of users are registered in the list, use the search fields to find the user you wish to set permissions for. Once you have found the desired user:

- **Permission type -** click the down-arrow beside a user's field to open a drop-down list of the permissions, then select the appropriate permission for that user. The options are:
    - o **None -** the user does not have access to the survey layout.
    - o **Read** - the user has only Read permission, i.e. he/she can view the survey layout but is not allowed to edit it. The **Save** button is disabled.
    - o **Write** - the user has Write permission, i.e. he/she is allowed to edit the survey layout and the **Save** button is enabled. The user can delete page layouts, question skins etc. but not the entire Survey Layout.
    - o **Delete** - the user has full read, write and delete permission for the Survey Layout.
- **Survey layout Administrator –** check the box if you wish this user to be able to assign permissions to other users.
- **Add other user –** click to open a dialog that allows you to add users to the list.
- **Remove other user -** click to open a dialog that allows you to remove users that have previously been added.
- **Grant all -** select a permission from the drop-down beside this button and click the button to give that permission to all the currently listed users. Note that if you do not wish to give the selected permission to all users in your company then you must first conduct a search such that only the appropriate users are listed on the page.
- **Revoke all -** select a permission from the drop-down beside this button and click the button to remove that permission from all the currently listed users. Note that if you do not wish to remove the selected permission from all users in your company then you must first conduct a search such that only the appropriate users are listed on the page.

On completion, save any changes.

The Permissions page lists a maximum of 50 users on the current page; click the **next/previous Page** buttons in the lower-right corner of the page to move between pages. Click a letter-button (along the lower edge of the page) to list only those users who's User ID starts with that letter. The list can be sorted on the User ID, First name and Last name columns; click the appropriate column header to toggle the sort order up or down on that column.

4.10.5. How to Export a Survey Layout

Note: You can only export a survey layout if you have administrator permission for it. If you do not have the appropriate permission, an error message will be displayed.

You can transfer Survey Layouts from one Confirmit server to another by exporting the layout from the original server and then importing it to the new server. If you wish to export the survey layout that is used by for example the current survey:

1. In the Survey Designer page, Questionnaire Tree toolbox, scroll down to the survey layout (the last folder in the toolbox).
2. Right-click on the survey layout and select **Edit in Professional Layout Designer**.

   The Survey Layout Editor page opens.

If you wish to export a survey layout directly from the Survey Layout List:

1. In the **Quick Access** menu, go to **Survey Layouts**.

   The Survey Layout List opens. This page lists all the survey layouts to which you have access.
2. Find and click on the survey layout you wish to export.

   The Survey Layout Editor page opens.

The remaining steps in the procedure are identical for all 'entry methods'.

3. In the Layout and Styles toolbox, click **Export**.

The Survey Layout Export overlay opens.

4. Check that the Email recipient details are correct (default is the current user - you), then click **Export survey layout**.

   The survey layout is attached to an email and sent to the defined recipient.

4.10.6. How to Import a Survey Layout

You can transfer Survey Layouts from one Confirmit server to another by exporting the layout from the original server and then importing it to the new server. If you wish to import a survey layout that is used by for example the current survey:

1. In the **Quick Access** menu, go to **Survey Layouts**.

   The Survey Layout List opens. This page lists all the survey layouts to which you have access.

2. Click **Import Survey Layout**, located towards the upper-right corner of the page.

   The Import Survey Layout overlay opens.

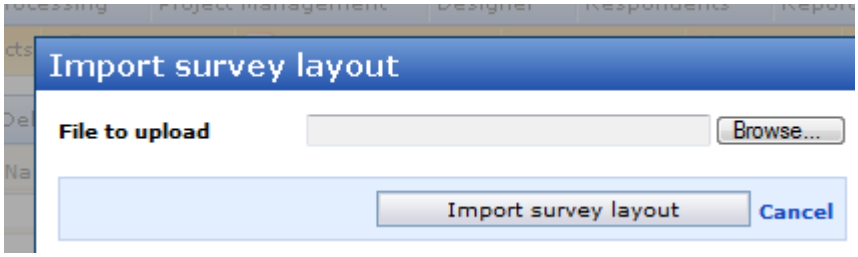


Figure 73 The Import Survey Layout overlay

3. Click **Browse** to open a standard file selection window, then browse to and select the survey layout you wish to import.
4. Click **Import Survey Layout**.

   The import task runs and the layout is imported.

5. On completion, click **OK** to close the import overlay and return to the Survey Layouts List page.

   The imported survey layout is now listed on the page. If the list is extensive, use the search and/or sorting functionality to find it. For example, sort the list by the Created date to find the most recent addition, or by your name to find the surveys that you have access to.

4.10.7. Working with Survey Layouts

An HTML table on the page will simplify positioning of the visual components on the page. However you can instead specify the positions inside the Styles directly, and this method is recommended if you want your Survey Layout to support 100% accessibility requirements (see Greater Accessibility on page 66 for more information).

For more information on working with HTML tables on a page, see the Confirmit Reportal Manual. Note that all Confirmit User Guides can be downloaded free of charge from the Confirmit Extranet at https://extranet.confirmit.com. You will need to log in to the extranet, then you can filter the list and search for particular documents.

You can set up a layout for mobile devices which will be used as default if no other mobile layouts are specified (see Mobile Layout on page 117 for more information). You can also set up a mobile layout for each theme in the Themes folder, which will be used when the respondent is using a mobile device and that theme is selected. And if your company has the Responsive Rendering functionality available, you can use a responsive layout which will present your survey in the optimum way irrespective of the device the respondent is using (see Responsive Rendering on page 131 for more information).

4.10.7.1. Themes

The overall definition of a survey page is called the Theme. Typically you would use the same theme throughout a survey, but if you want some pages to differ from the others, you can create one theme for each different look.

Confirmit's themes have built-in "Accessibility" functionality, such that the surveys using those themes are easier for respondents with disabilities to use. The functionality is activated via a menu command (see The Accessibility Functionality on page 43 for more information) or a checkbox on the theme property page (see Theme Properties on page 81 for more information).

Note that you can set a theme to be the "Inline Theme". This theme will then be used by default when the survey is displayed as an inline survey (see The Web Options Tab Properties on page 504 for more information).

To create a new theme in the **Themes** folder, right-click on the **Themes** folder and select **Insert Theme** from the menu. Note that when a new theme is created in a survey layout, the default document type will be set to HTML5.

4.10.7.1.1. How to Assign a Theme to a Survey Page

In the survey, you can specify the theme for Page objects and Directives inside the Questionnaire Tree. You can use this to change the theme used to present a particular question such that it is different from the default theme used for the survey. To specify the theme to be used for a question:

1. In the Questionnaire, place a Directive object before the question you wish to specify the theme for.
2. Double-click on the Directive object or right-click on it and select **Edit**.
3. Set the Theme as required (set also the type of Directive).
4. Save the changes.

Note: Confirmit will use the default theme for every interview page where no other theme is specified.

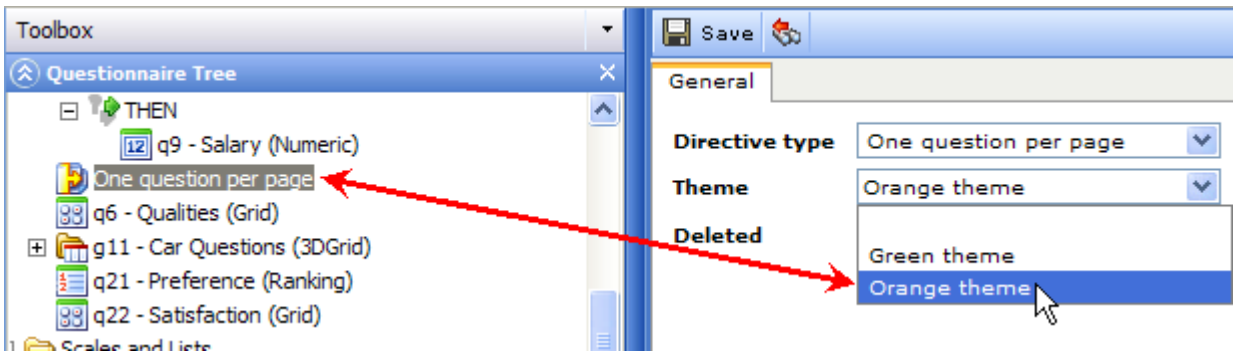


Figure 74 You can select the theme to be used by setting it on Directives and Page objects

In the figure above, a Directive is being used to specify that the Orange theme is to be used for the next interview page. The "Qualities" grid question is then presented with the Orange theme as shown in the figure below.

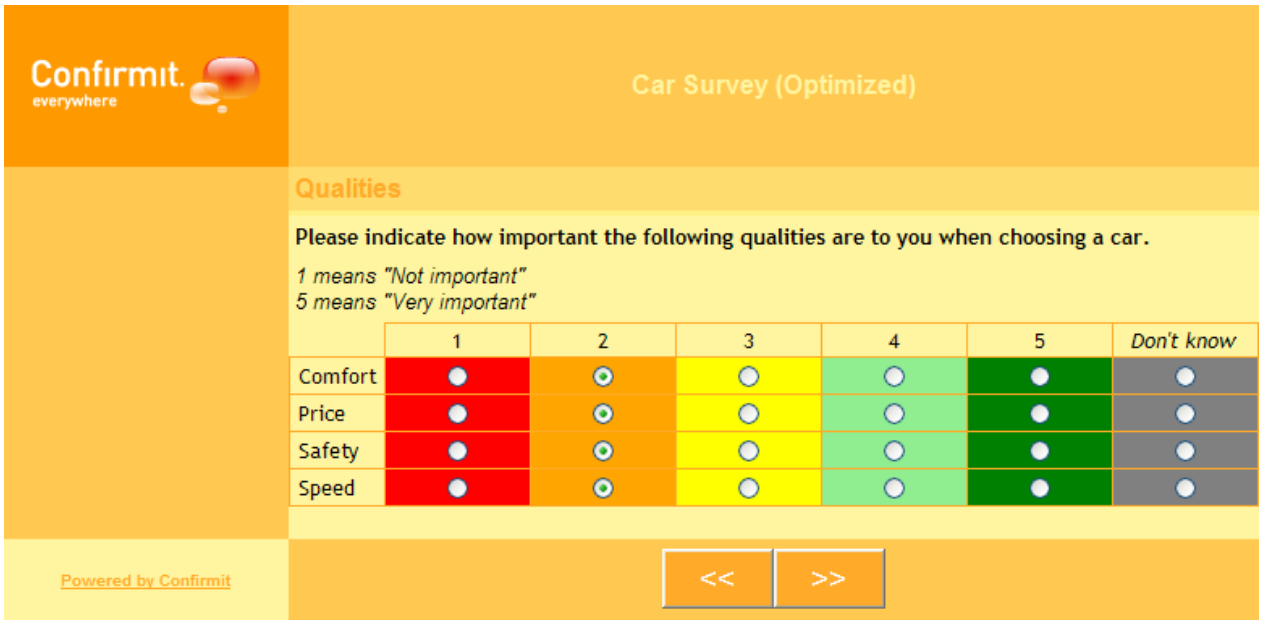


Figure 75 A grid question in the "Orange" theme

If instead the "Green" (in this case, the Default) theme is specified, the question will be presented as shown below.

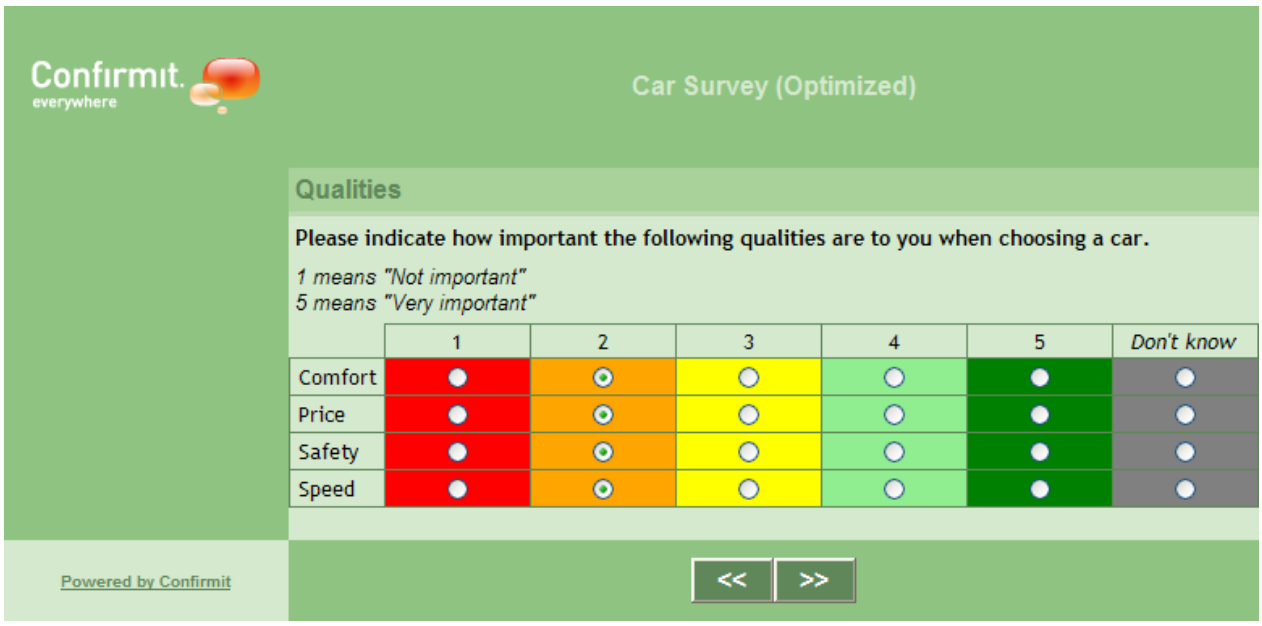


Figure 76 The same grid question using the "Green" theme

4.10.7.1.2. How to Set the Default Theme

To set one of the themes as the default for the survey:

1. In the Questionnaire Tree toolbox, go to the **Themes** folder and right-click on the theme you wish to set as default.
2. Choose **Set as Default** from the pop-up menu (point 1 in the figure below).

Confirmit will display **(DEFAULT)** after the current default theme (point 2).

In the figure below, "Green theme" is currently the default theme. However in this case if **Set as Default** is clicked now, the “Orange theme” will become the default.

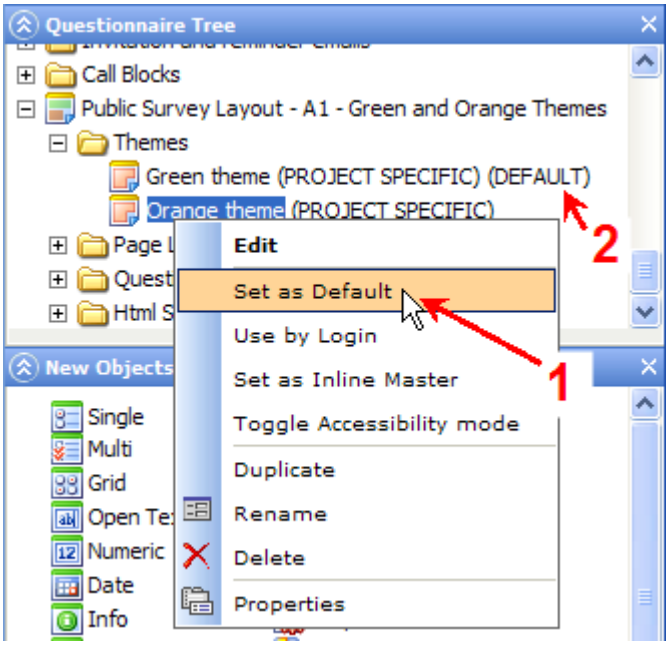


Figure 77 Setting a theme as Default

4.10.7.1.3. How to Edit a Theme

There are two methods of editing a theme:

1. You can open a theme for editing by double-clicking on its name in the **Themes** folder in the Questionnaire toolbox, or by right-clicking on it and choosing **Edit**.

   The theme's Page Editor opens with the elements laid out on the page. You can then edit the layout of the page, and double-click on an element to open its properties list to edit the properties.

Note: If your survey may be answered by users on mobile devices, then you can also set up a Mobile layout for each theme. To edit these settings, right-click on the theme and select Edit Mobile Layout Settings. The settings available are the same as those available through the Edit Mobile Layout button (see The Survey Channels Tab Mobile Phone Options on page 496 for more information). In the event no specific mobile settings are made for a theme, then the default Mobile Layout will be used.

2. You can expand the theme in the Questionnaire Tree, then right-click on the desired element in the theme and select **Properties** to open the element's properties list.

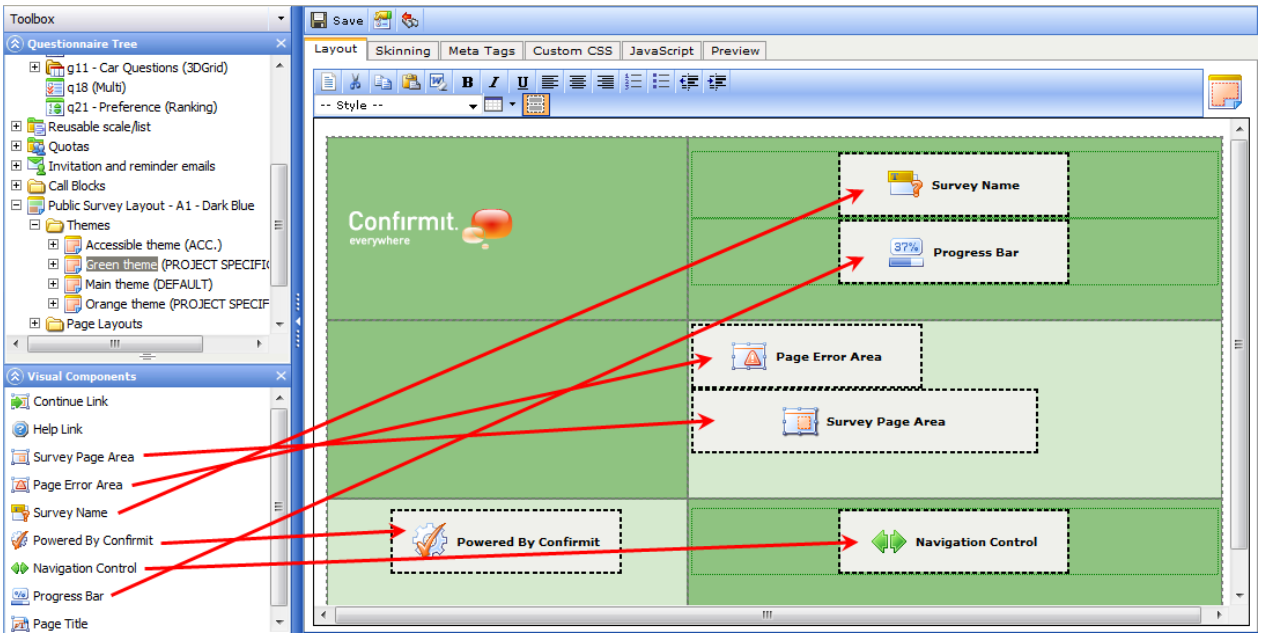


Figure 78 Editing a Theme

There are nine different survey elements that can be placed on a survey page. To edit the theme, go to the **Layout** tab and drag-and-drop elements from the Visual Components toolbox. Alternatively you can right-click anywhere on the page and choose **Insert Component** from the pop-up menu. The Layout tab lets you decide the position for each of the survey elements you want to use. The figure above shows how four elements have been dragged-and-dropped onto the page.

- Go to the **Custom CSS** tab to enter any required Cascading Style Sheet to the theme (see The Custom CSS Tab on page 81 for more information).
- Go to the **JavaScript** tab to insert JavaScript into the theme. Theme JavaScript will run when the theme is available for use on the client and before any advanced WI features have been initiated.
- Go to the **Preview** tab to preview the current theme. Note that Confirmit must display a preview of a specified question page, so you must first select a question in the questionnaire tree to see the preview.

4.10.7.1.4. The Survey Page Area Component

The **Survey Page Area** element determines where the actual question is to be placed on a page. If you are using a Page Layout, the “Survey Page Area” element functions as the placeholder for the entire Page Layout.

4.10.7.1.5. Survey Layout Component Properties

Each of the visual components used in the survey layout has a Properties page. To access this page, right-click on the component in the Layout tab and select **Properties**. The properties available depend on the component selected. The main properties are described below (note that some properties are variations of main properties):

- **Style Name –** the name of the style.
- **Main Style Name –** specifies the position and style of the progress bar (except the bar itself) including the percentage numbers.
- **Bar Style Name –** specifies the style of the bar in the progress bar.
- **Bar Background Style Name** – specifies the style for the bar’s background area.
- **Navigation Area Style Name –** specifies the position and layout of the Navigation area.
- **Navigation Control Style Name –** specifies the style of the navigation control.

- **Override Next Control Style Name –** specifies the style for the **Next** button.
- **Override OK Control Style Name –** specifies the style for the **OK** button.
- **Buttons –** specifies whether the navigation control should include only a **Back**-button, only a **Next**-button or both.
- **Tag Name –** each component generates an HTML marker, and this property allows you to select the tag type for the visual component. The options are div, span, P, H1, H2 , H3, H4, H5. This gives more flexibility, and for example allows you to specify H1 for survey titles (or other headers), and H2 for question texts if question titles aren't used (question titles already use H2).
- **Forward-first rendering -** when this property is selected, the **Forward** (next question) navigation button will be placed first in the tabbing order, even though it will still appear on the questionnaire form to come after. This is useful for accessibility surveys (see The Accessibility Functionality on page 43 for more information).
- **Rendering Mode -** [Progress Bar and Navigation Control only] the Progress Bar and the Navigation Controls (Forward and Back buttons) can be displayed such that they are easier to use for respondents with disabilities, and in addition can be recognized by vocalization applications designed for use by the visually impaired (see The Accessibility Functionality on page 43 for more information). Select between **Inherit** (the control uses the accessibility layout specified for the rest of the theme), **Accessible** (the control always uses the Accessibility, non-table-based layout) or **Legacy** (the control will always use table-based rendering, not the Accessibility layout).

4.10.7.1.6. The Skinning Tab

Use the **Skinning** tab to specify which Question Skin you wish Confirmit to use for each of the different question types (info, open, single, multi, grid, 3D-grid). You can override the default Skin when you want a specific question to have a special look, by going to the **Properties** page for the specific question.

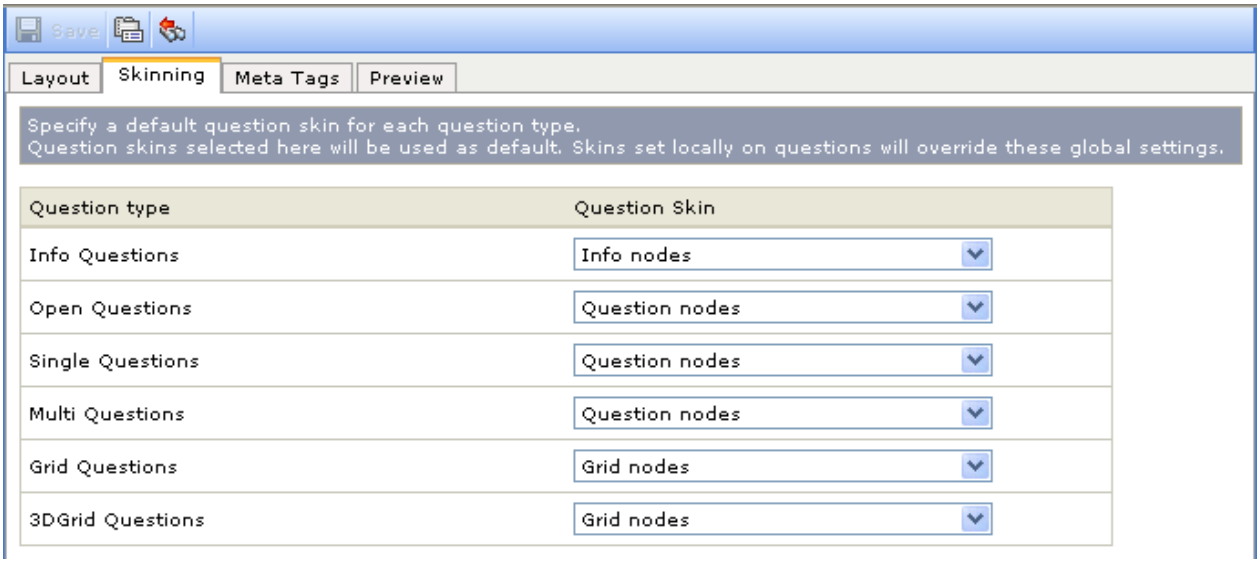


Figure 79 Example of the Skinning tab

4.10.7.1.7. The Meta Tags Tab

Use the Meta Tags tab to include additional information in Meta Tags on the HTML page. This information will not be visible on the survey page.

1. Click the **Add** button to create a new row in the tab.
2. Click the down-arrow beside the Name field to open a list of standard tags or type another tag name into the field.
3. Add the content of the tag into the Content field.

4. Click **Save** to save the changes.

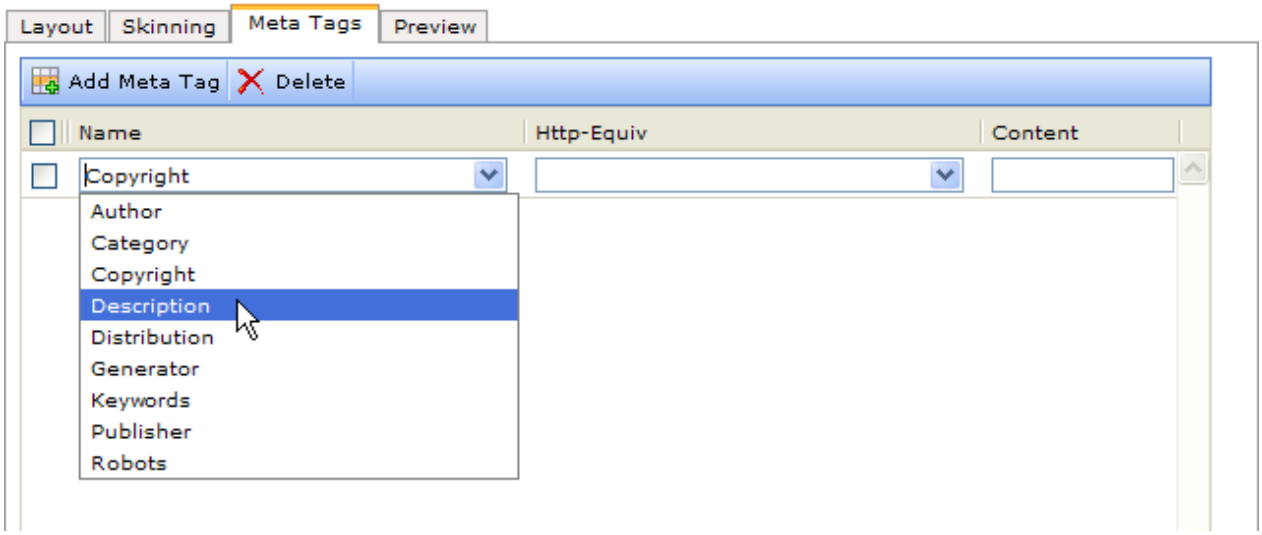


Figure 80 Example of the Meta Tag tab

- **Http-Equiv -** provides an HTTP header for the information in the Content attribute. The Http-Equiv attribute can be used to simulate an HTTP response header, and its value depends on the value of the Content attribute. If the Name attribute is set, the Http-Equiv attribute should not be set.

4.10.7.1.8. The Custom CSS Tab

The Custom CSS tab allows you to enter any required Cascading Style Sheet (CSS) to the theme. This will then be rendered inline in the survey, and will be visible in the preview. These can be used in Authoring, Panel Portals and Reportal

Surveys support project-specific changes to custom CSS, and this property is preserved on duplication and export of layouts and surveys.

4.10.7.1.9. Theme Properties

Right-click on a Theme in the Questionnaire Tree toolbox and select **Properties**, or if the theme is already open click the **Show/Hide Properties** button, to open the Properties page for that Theme.

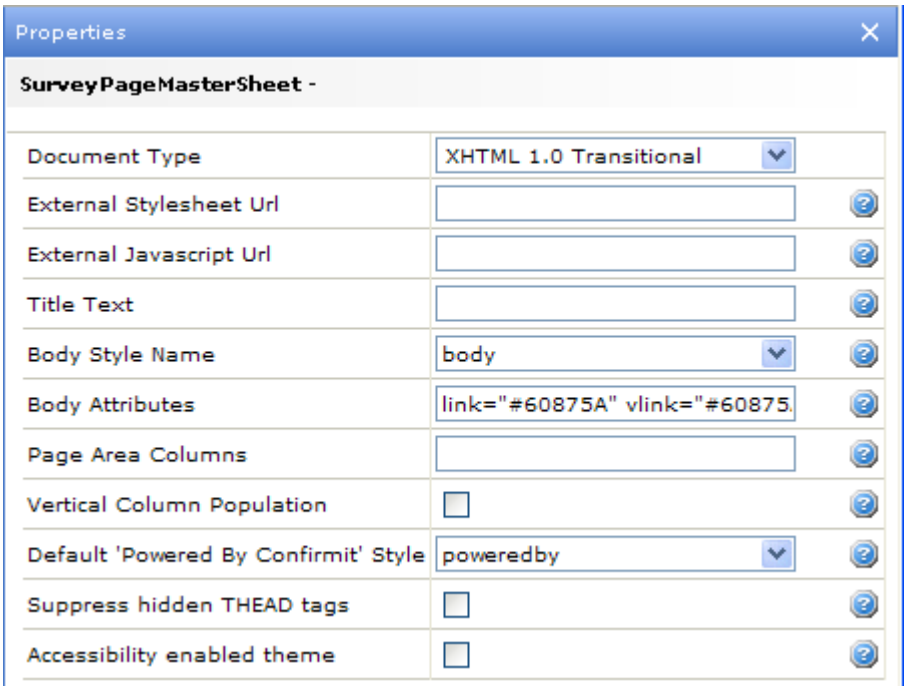


Figure 81 Example of a Theme's Properties page

- **Document Type –** choose a standard for the document type. Note that when a new theme is created in a survey layout, the default document type will be set to HTML5.
- **External Stylesheet Url –** if you already have style sheets set up outside of Confirmit, you do not have to re-define your styles inside Survey Layouts. You can enter the URL of the **.css** file that holds the definitions, and refer to the style names directly in your survey (see Using an External Style Sheet on page 83 for more information). You can add multiple URLs to the field; use a comma (,) as the separator.
- **External Javascript Url –** you can refer to an external Javascript file inside your survey. Enter the URL of the **.js** file you wish to use. You can add multiple URLs to the field; use a comma (,) as the separator.
- **Title Text –** enter a text that you want to display in the title bar of the survey browser. The field also supports the **^SNAME^** primitive should you wish to show the survey name in the title bar.
- **Body Style Name –** the style to be set for the BODY-tag in the document.
- **Body Attributes –** define the body attributes for the theme. Body attributes include link, vlink, alink, leftmargin, topmargin, marginwidth, and marginheight.
- **Page Area Columns –** a theme can automatically display questions on a page in two or more columns. For example, if you have a survey page with eight questions, if you specify **2** here, Confirmit will display the first four questions in column one, then the remaining questions in column two. This can be used in combination with the "Vertical Column Population" property.
- **Vertical Column Population –** use together with Page Area Columns. When you have several columns of questions on a page you can decide whether questions are to be populated horizontally or vertically. If selected, the questions will be displayed in vertical order.
- **Default 'Powered By Confirmit' Style –** all surveys will have the text "Powered By Confirmit" displayed on each survey page. You specify the look and feel of this text by choosing a style for the text here. Under the Layout tab in Themes you also decide where on the page to place the text.
- **Suppress hidden THEAD tags** - THEAD tags are hidden tags that are normally rendered for accessibility compliance. However the tags are not supported in all browsers (e.g. mobile browsers) and can therefore cause problems in some cases. Check this box if you wish to remove the THEAD tags from the HTML output. This property applies to non-grid questions (i.e. open, single and multi).

- **Accessibility enabled theme** - check this box if Accessibility features are to be enabled for this theme (see The Accessibility Functionality on page 43 for more information). The notation (ACC.) then appears beside the theme name in the Questionnaire Tree toolbox. Note that checking/unchecking this box has the same effect as right-clicking on the theme name in the Questionnaire Tree toolbox and selecting **Toggle Accessibility Mode** (see How to Activate the Accessibility Functionality on page 44 for more information)
- **Use newest available version of IE rendering -** Internet Explorer versions later than 7 render pages very differently from Internet 6 and 7. Therefore Confirmit runs all surveys in a compatibility mode which makes newer versions of Internet Explorer behave like Internet Explorer 7. This is to avoid the extra complexity related to creating html and css that behave the same in all versions of Internet Explorer. However it is possible to turn this compatibility mode off. This means that Internet Explorer will always run in the best available mode, based on Doctype and Internet Explorer version. Use this property in combination with the HTML5 doctype option to run Internet Explorer 8 and 9 (and later) in the most modern rendering mode available in these browsers. The article on the Microsoft URL below explains the subject in more detail:

  http://msdn.microsoft.com/en-us/library/cc288325(v=vs.85).aspx

4.10.7.1.10. Use by Login

If your survey is launched in Production as a “Limited survey with login page” each respondent is taken to a specific page where he/she must enter a valid log-in before being allowed to see the first page of the actual survey. You can create a specific look and feel for that log-in page. Right-click the Theme you want to use for the log-in page, and choose **Use by Login**. The log-in page for that survey will then be based on that Theme.

4.10.7.1.11. Using an External Style Sheet

When an item is to be displayed by Confirmit, the system looks for the HTML style definition to be used (see HTML Styles on page 102 for more information). The system checks all the style sheets available within the survey, in the specified order, and will use the 'last' version of the style definition that is found.

If you already have style sheets set up outside of Confirmit, you do not have to re-define those styles inside Survey Layouts. You can enter the URL of the .css file that holds the definitions, and then refer to the style names directly in your survey. A style sheet that is not stored within Confirmit is known as an external style sheet.

Note: An external style sheet will be checked last, so any styles defined in the external style sheet will take precedence over other "versions" of the style defined in other style sheets. In-line styles that are applied "outside" of the style sheets take final precedence and will override all other style definitions.

This process is normally used at the Theme level rather than at the individual question level, however once the URL is added to the theme Properties sheet, the styles that the style sheet contains can be used throughout the survey.

Accessing an External Style Sheet

Say for example that an externally-stored style sheet contains a style that you wish to apply to a piece of text in your survey. To use this style you must first tell the survey where the style sheet is located, and "connect" the style sheet to the survey:

1. Right-click on the Theme you are using and select **Properties** to open the Properties page for that Theme.
2. Type or copy the URL to the style sheet into the External Stylesheet URL field (see Theme Properties on page 81 for more information).

   On saving, the link will be added to the survey head tag, and you can now make use of the styles defined in the external style sheet.

There are then two main methods of telling the survey when and where a style is to be used:

Typing HTML Code Directly into the survey

As the heading suggests, with this method you need to type code directly into the survey. As an example, assume the style sheet contains the style as follows:

```
.text {font-weight : bold; color : red}
```

and assume you wish to apply that style to some text - "A piece of text" - that is to appear on a page in your survey.

1. Go to the theme's Layout tab and toggle the **Editor Mode** button until you can view the HTML Editor.

2. Type into the HTML window the code:

```
...<p class="text">A piece of text</p>...
```

as in the example shown below.

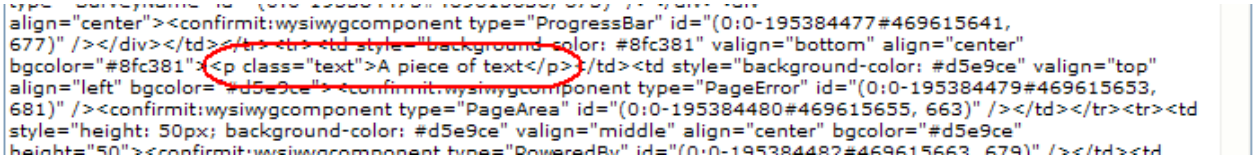


Figure 82 Example of the code to apply a style from an external style sheet

3. Save the changes.

Your "piece of text" will then be presented as defined in the external style sheet; in this case in bold, red text.

Setting an "external" Style on an Element's Properties

You can also elect to use a style from an external style sheet for any element for which a style can be selected. To do this, go to the element's Properties sheet.

The illustration below shows the drop-down list for the Style Name field for the Info nodes question skin. Note that styles defined in external style sheets are not included in the drop-down list of styles available for an element; you must type the name of the style into the appropriate field.

To use a style from an external style sheet for this element, type the name of the style "manually" into the style field (for this element, the Style Name field).

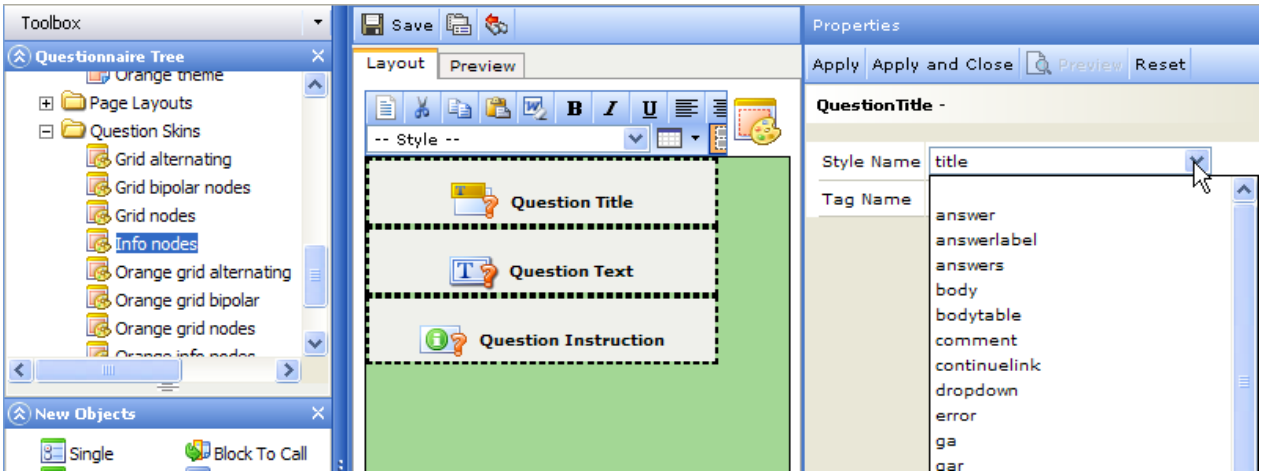


Figure 83 Selecting a style for the Info nodes question skin

For further information on style sheets and HTML coding, try searching for "css" on the Internet.

4.10.7.2. Page Layouts

Use a Page Layout when you want one or more survey pages to display questions in a particular way. Page layouts can be applied to pages (see The Page Object on page 303 for more information). In the properties of a Theme you can set a page to display questions in columns or rows. Page Layouts are used to customize pages even further, for example if you want to place one question centered across the top and then another two questions next to each other beneath the top centered one (or any other “special look”). For relatively simple surveys there is no need to use Page Layouts as Themes and Questions Skins will suffice.

To edit a Page Layout, double-click on its name in the Layout and Styles toolbox, or right-click and choose **Edit**. The page editor opens.

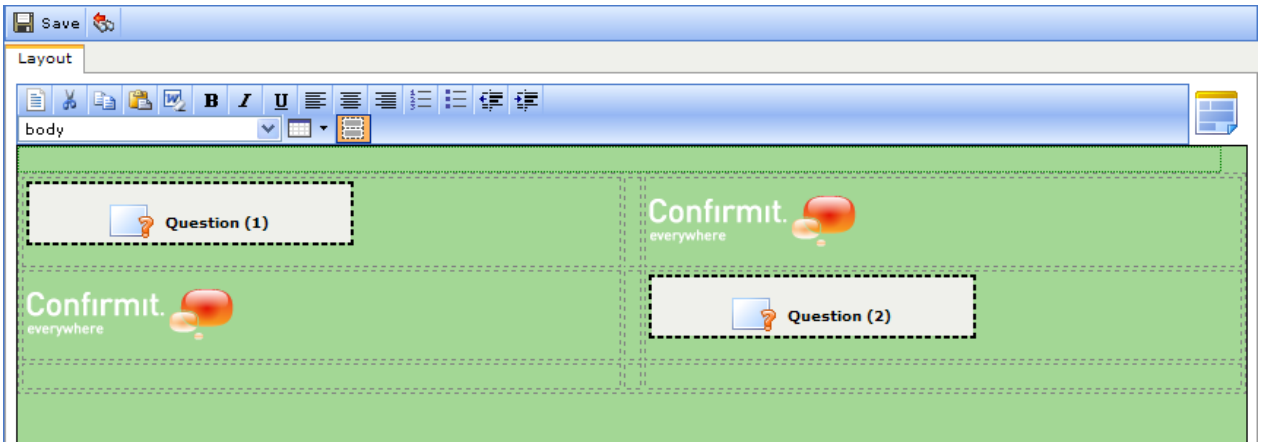


Figure 84 Example of the Page Layout

Among the Visual Components available for Page Layouts is one called “Question”. This element functions as a place-holder for a question, enabling Confirmit users to place questions anywhere on a page and show as many questions as desired on that page. The Page Layout can then for example be activated on a Page object which holds the required number of questions. If there are not enough questions on a page to fill all the question place holders, then the extra place holders will be ignored.

4.10.7.3. Question Skins

For most surveys you would probably want all the questions to have the same look and feel, so you would set up the "default" skin as you wish the questions to look, and use that default throughout the survey (see How to Set the Default Skin on page 85 for more information). However should you wish to display one or more questions differently, you can set up additional **Question Skins** and then apply a specific Question Skin to an individual question under the properties for that question (see The General Tab on page 251 for more information). If no particular question skin is specified in the properties for a question, then that question will automatically follow the look and feel defined by the default skin.

The properties (position, color, font etc.) for each item in the question skin, including the background, are defined by that item's HTML Style (see HTML Styles on page 102 for more information)

4.10.7.3.1. How to Set the Default Skin

The Default skin will be used in all cases when no other skin is specified. To select a particular skin to be the default skin:

1. In the Questionnaire Tree toolbox, expand the **Question Skins** folder.
2. Right-click on the skin you wish to define as the default, and select **Set as Default** from the menu.

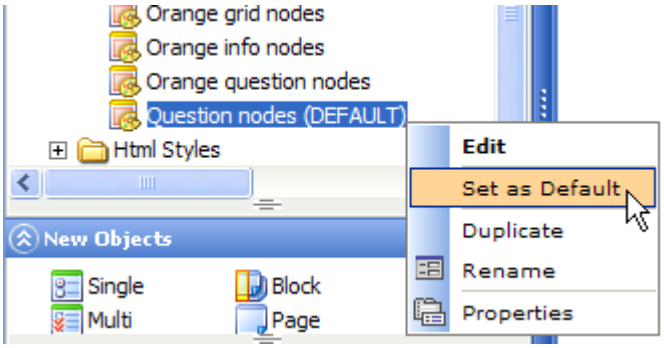


Figure 85 Setting a skin as Default

3. Save the changes.

   The text **(DEFAULT)** is displayed after the skin name.

4.10.7.3.2. How to Edit a Question Skin

There are two methods of editing a question skin:

1. You can open a question skin for editing by double-clicking on its name in the **Question Skins** folder in the Questionnaire toolbox, or by right-clicking on it and choosing **Edit**.

   This opens the Page Editor for the skin as shown below. As with Themes (see Themes on page 610 for more information), you can then double-click on a question component (or right-click and choose **Edit**) to open its properties list to change the HTML style for that component (see How to Edit the Question Components on page 100 for more information)

2. You can expand the question skin in the Questionnaire Tree, then right-click on the desired element in the skin and select **Properties** to open the element's properties list.

On the **Layout** tab you specify the positions of the question elements. Drag-and-drop elements from the “Visual Components” toolbox into the desired locations. In the example below, the question elements are placed in a column on a white background.

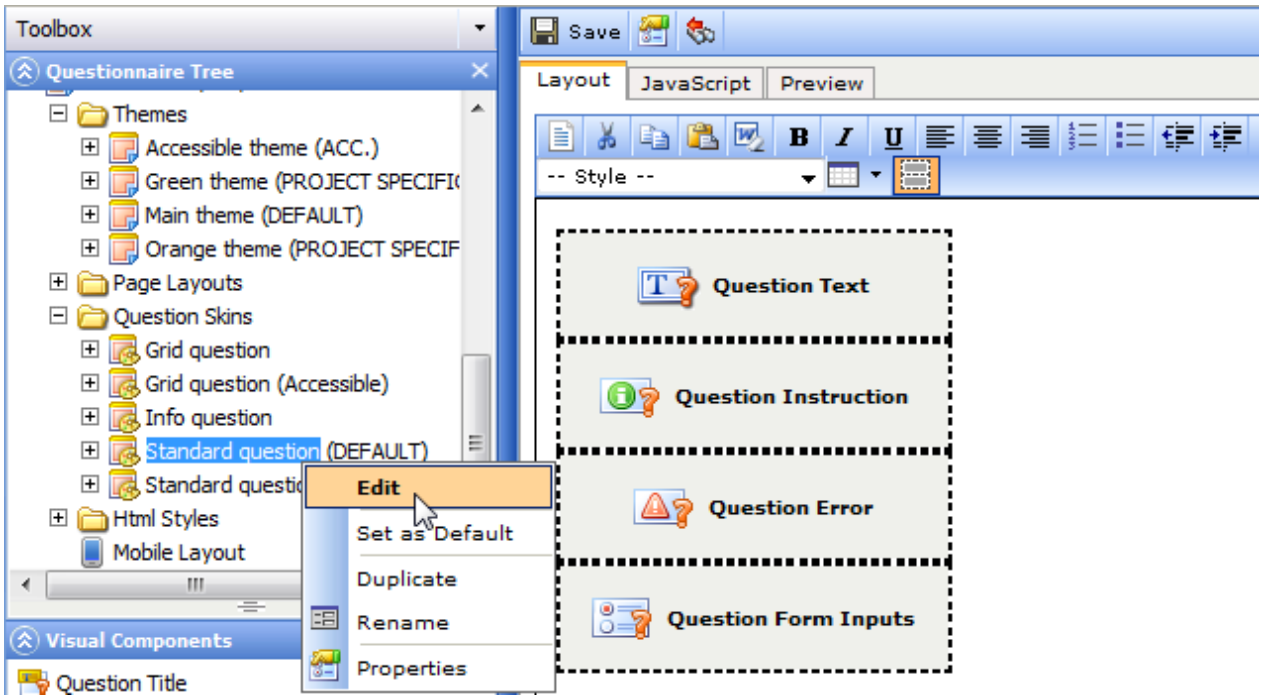


Figure 86 Editing a Question Skin

- Go to the **JavaScript** tab to insert JavaScript into the question skin. Question skin script will run after the skin is available to the client and any advanced WI features have been initiated.
- Go to the **Preview** tab to preview the current theme. Note that Confirmit must display a preview of a specified question page, so you must select a question in the questionnaire tree to see the preview.

4.10.7.3.3. Visual Components for Question Skins

You can use five different visual components inside a Skin, as follows:

- **Question Title –** this component is a place-holder for the question title.
- **Question Error –** this component is a place-holder for the error message that is displayed if the respondent does not answer the question correctly (for example does not answer the question, checks too many boxes etc.).
- **Question Text –** this component is a place-holder for the question text.
- **Question Instructions –** this component is a place-holder for the question instructions.
- **Question Form Inputs –** this component is a place-holder for the answer alternatives for the question. For open questions, this refers to the actual text-box which the respondents use to provide feedback. For single and multi questions, this component defines the layout for the answer labels, the answer inputs (radio buttons or check boxes), and headers. For grid questions, the settings also include the look and feel of the scale, and the right-side labels if these are used).

These components are listed in the Visual Components toolbox, and can be dragged into the skin Page Editor and positioned as required.

- The skin background (in this case the green area in the figure) can be given an "overall" style. Click into the background area without selecting anything and choose a style for the area from the drop-down list in the toolbar.
- If you add text to the background area, you can also select parts of that text and specify a different style, again by using the selection box in the toolbar.

The various components have different sets of property elements, as appropriate for the specific component, and each property element can be allocated a specific style. In all cases, to specify the styles that are to be used for the elements in a component:

1. Right-click on the component and select **Properties** or double-click on the component to open the Properties pane as shown below.
2. For each element, select from the drop-down list the style you wish to use.
3. Click **Apply** to apply the changes and keep the Properties pane open, or click **Apply and Close** to apply the settings and close the window.

Note: The Question Form Inputs component has a large number of properties for which you can specify styles. These are grouped into tabs as shown in the figure.

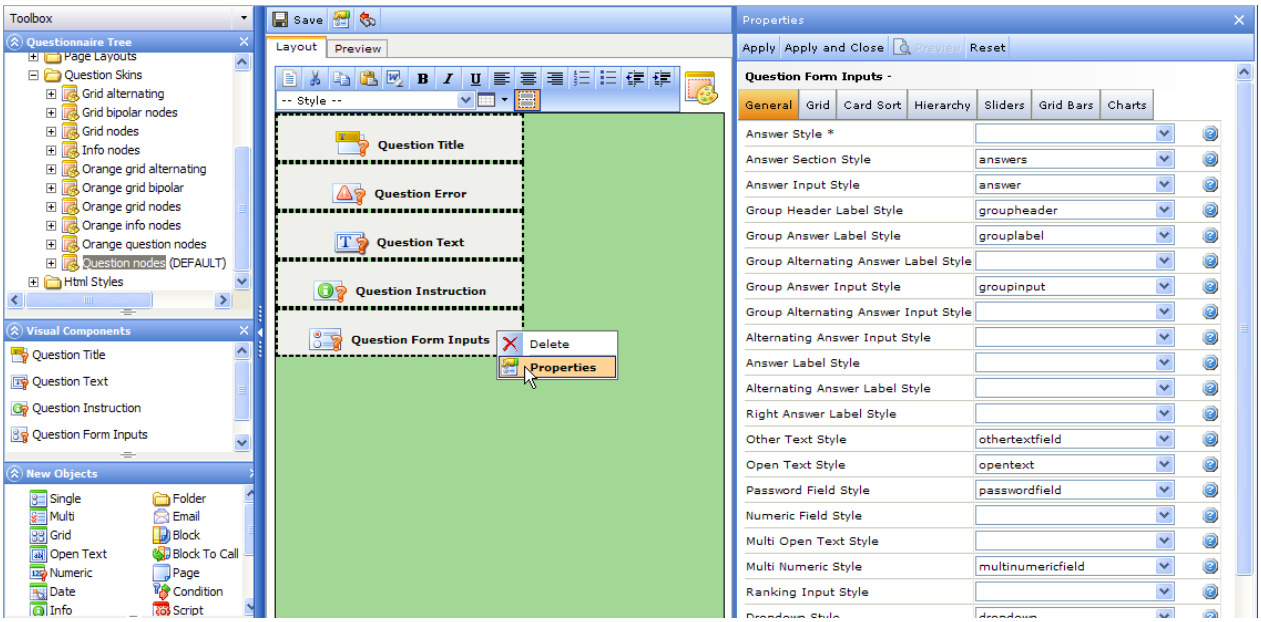


Figure 87 Example of the Question Form Inputs component's properties

Note: When you open the Properties pane for a component, the elements available for that component are listed. Any styles that have already been specified for the various elements are displayed alongside the element. If a style has not been selected for an element then that element's style box will be blank; the element will then adopt the default setting. The styles listed in the drop-down list are those contained in the HTML Styles folder in the Questionnaire Tree. All these HTML styles can be edited individually (see HTML Styles on page 102 for more information).

Note: You can also use styles that are defined in external style sheets (see Using an External Style Sheet on page 83 for more information).

The **Question Form Inputs** are the Question Skin components in which the style settings are most complex. Some of the terms are defined below:

- **Answer section** - The entire area in which answers are displayed. One answer normally consists of one or more inputs and a corresponding label.
- **Label** - The text that describes the input. For a Grid or 3DGrid question, the label is the statement (not the scale). Drop-downs do not have labels for each answer.
- **Input** - The part of the question where a user can change something (an input-field, a checkbox, a radio-button or a drop-down).

The properties elements available for the components are described in the following sections.

Answer Style

Accessibility mode only. This is the style that is set on each answer of a question when the Accessibility mode is activated. This allows you to for example set enlarged text, contrasting colors etc. on the questions specifically for this mode.

Answer Section Style

The **Answer section Style** (the area with yellow background) specifies a style for the entire answer-region of a question. Any settings for this style will be overridden by more "specific" answer-related styles, but this style can be used to complement those styles.

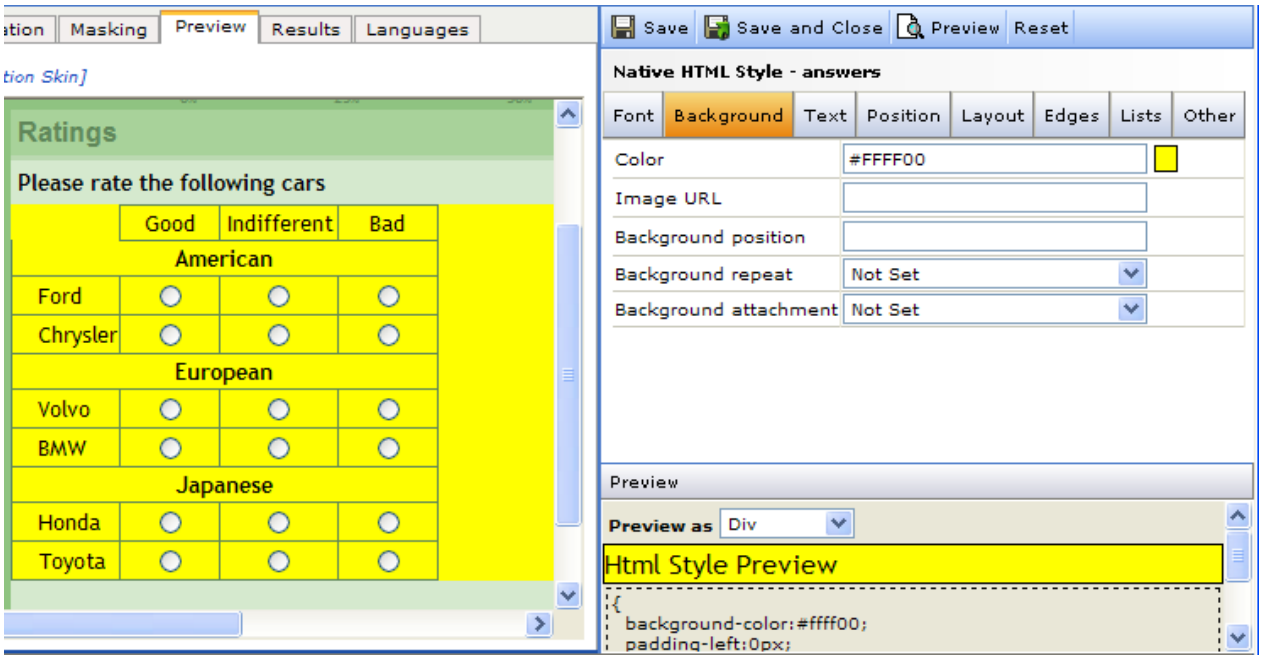


Figure 88 Example of the Answer Section style

Answer Input Style

The **Answer Input Style** specifies a style for the input cells (the areas with yellow backgrounds) . The style is set on each answer of a question (the entire row) if no other style is specified for labels or inputs.



Figure 89 Example of the Answer Input style

Group Header Label Style

This specifies the style for the group header labels, as shown below with red background. If nothing is specified, the general label style will be used. This style can be overridden by a style set directly on specific answers.

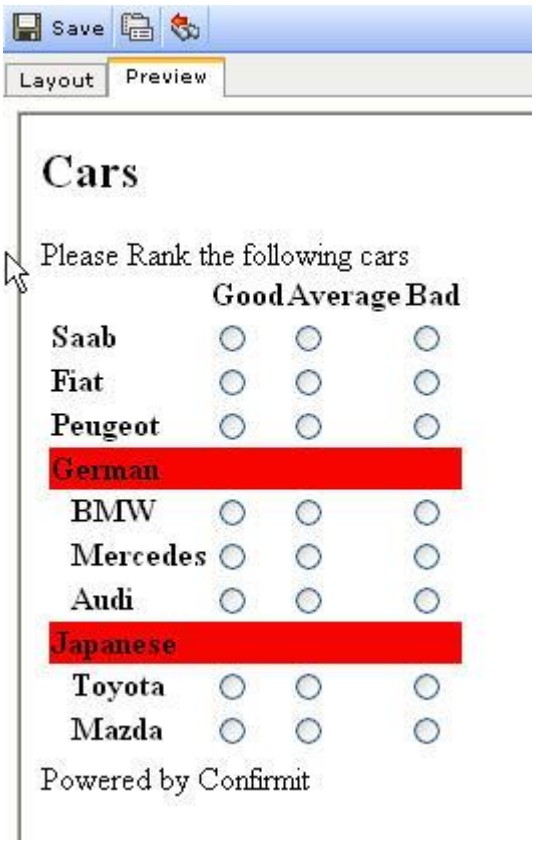


Figure 90 Example of the Group Header Label style

Group Answer Label Style

This specifies the style for the group answer labels, shown with red background below. If nothing is specified here, the general label style will be used. This style can be overridden by a style set directly on specific answers.



Figure 91 Example of the Group Answer Labels style

Group Alternating Answer Label Style

This sets the style to be used for the Label part of the group answer row within a group header, for alternating rows. If this style is not specified, the selected group label style will be used. This style can be overridden by a style set directly on specific answers.

Group Answer Input Style

This specifies the style for the group answer input areas, shown with red background below.

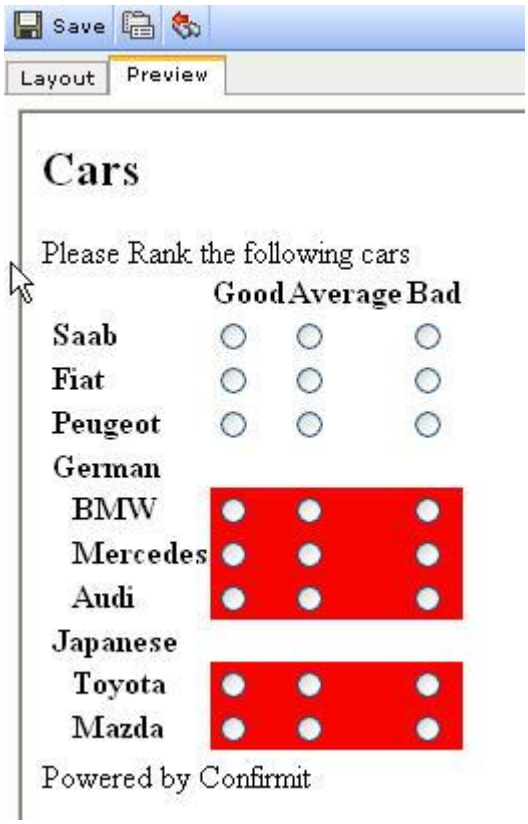


Figure 92 Example of the Group Answer Input style

Group Alternating Answer Input Style

This is the style to be used for the input part of the group alternating answer row.

Alternating Answer Input Style

In the event you wish alternate answers to have different layouts, use this style to specify the “second” layout.

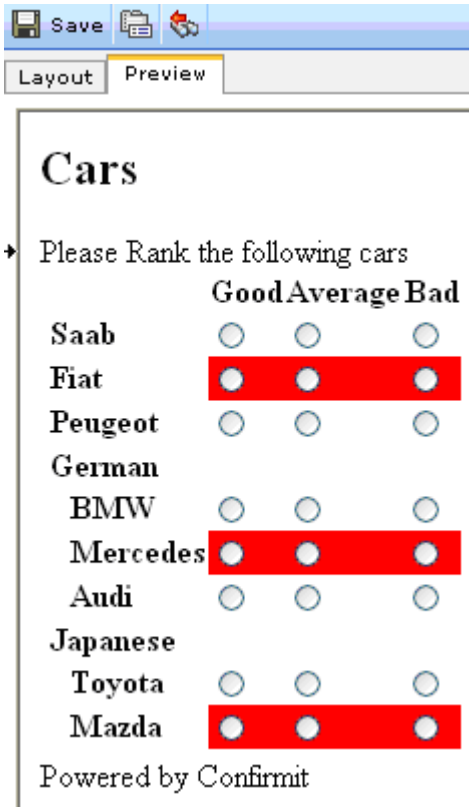


Figure 93 Example of the Alternating Answer Input style

Answer Label Style

This sets the style for the answer labels, shown in red below. In this example, no style has been specified for the group-header and group-answer styles. This style can be overridden by a style set directly on specific answers.

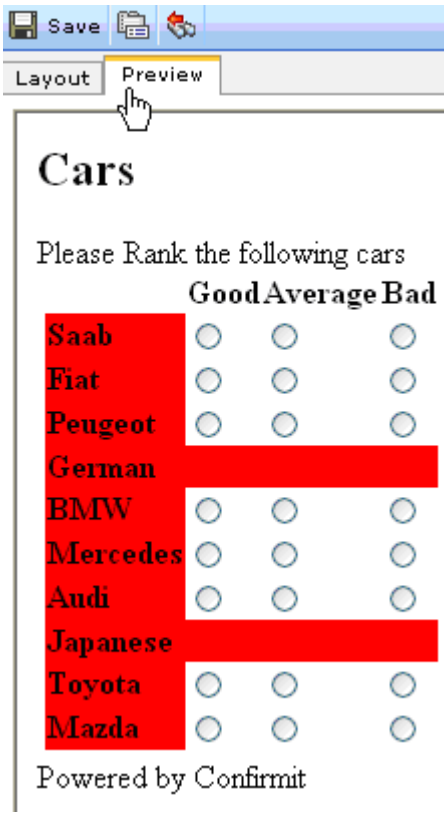


Figure 94 Example of the Answer Label style

Alternating Answer Label Style

In the event you wish alternate answer labels to have different layouts, use this style to specify the “second” layout. If nothing is specified here, the group label style will be used. This style can be overridden by a style set directly on specific answers.

Note that the ‘Alternating Answer Label Style’ setting will often be challenged by group-header and group-answer labels. In the figure below, the ‘Alternating Answer Label Style’ is set and that has affected other aspects of the style than the background-color (alignment and bold/non-bold).



Figure 95 Example of the Alternating Answer Label Style

Right Answer Label Style

Use this style to specify the layout for the answer options displayed to the right of the answer grid table as shown below, if 'left and right answer-text' is enabled.

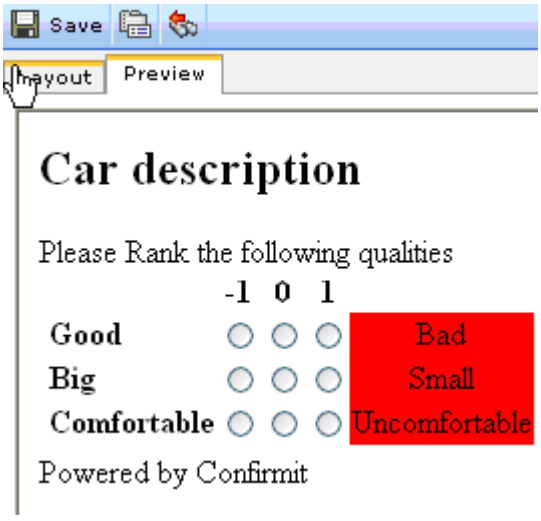


Figure 96 Example of the Right Answer Label Style

"Other" Text Style

This selects the style to be used for "Other" text input fields.

Open Text Style

This sets the properties for the text input field of the Open Text element. A similar style is available to enable you to set the properties for the OtherTextField, PasswordField, NumericField, MultiOpenText, MultiNumericField and RankingInputStyle.

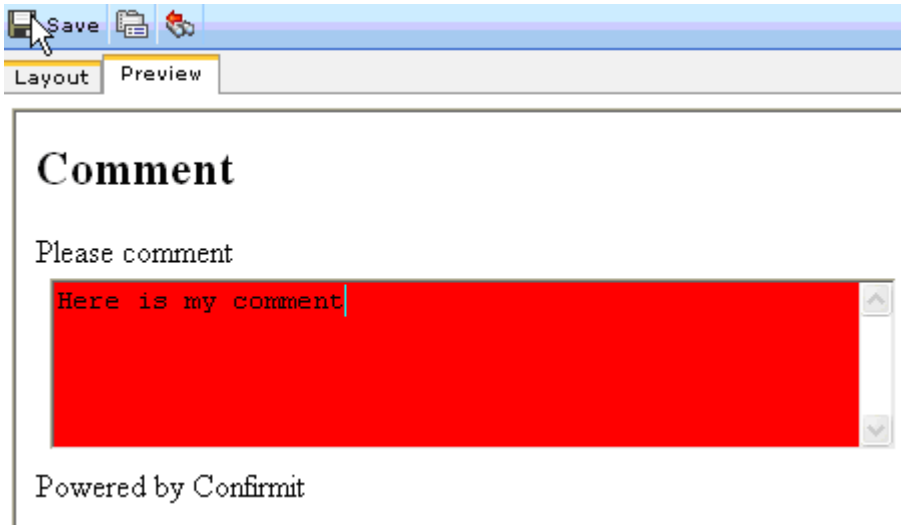


Figure 97 Example of the Open Text style

Password Field Style

This specifies the style to be used for the Password input field.

Numeric Field Style

This specifies the style to be used for Numeric input fields.

Multi Open Text Style

This specifies the style to be used for Multi Open-text input fields.

Multi Numeric Style

This specifies the style to be used for Multi Numeric input fields.

Ranking Input Style

This specifies the style to be used for the input fields of a Ranking question.

Drop-down Style

Select the style to be used for drop-down lists.

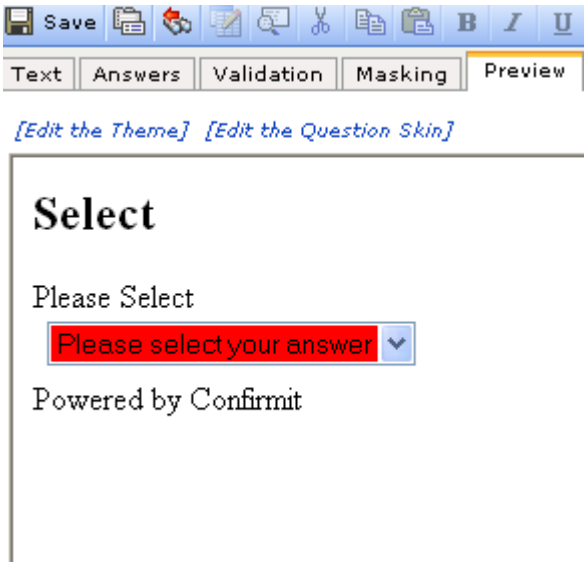


Figure 98 Example of the Drop-down style

Tag Name

To achieve better accessibility compliance, you can select the tag type for visual components in survey layouts. The options are div, span, H1, H2 , H3, H4 and H5. This allows more flexibility, and for example enables you to use H1 for survey titles (or other headers) and H2 for question texts if question titles aren't used (question titles already use H2).

Question Title in Legend

Check this box to have the question title displayed within the chart legend.

Question Text in Legend

Check this box to have the question text displayed within the chart legend.

Question Instruction in Legend

Check this box to have the question instruction text displayed within the chart legend.

Grid Table Style & Grid Table Cell Style

Grid Table Style is set once on the main table rendering a Grid or 3DGrid question (the red area below). Grid Table Cell Style is set on each non-label cell in the grid (the yellow area). Note that while only an override will prevent 'Grid Table Style' being used, 'Grid Table Cell Style' will be replaced by almost any style set on a label or input.

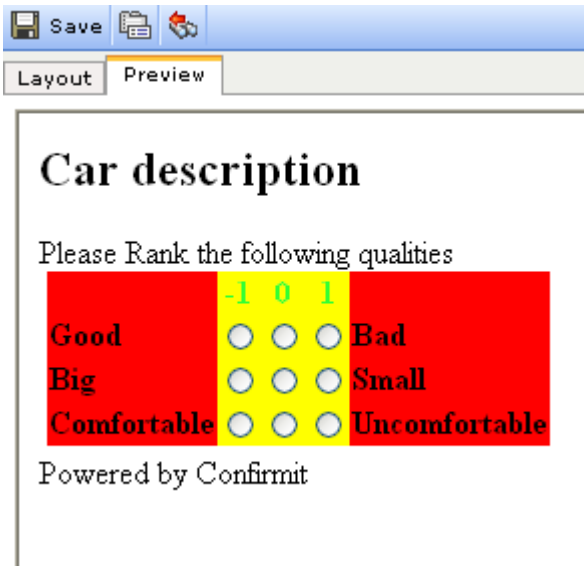


Figure 99 Example of the Grid Label Style

Grid Table Error Cell Style

This specifies the style to be used in the event the respondent makes an error when answering a grid question (see How to Highlight Error Cells on page 296 for more information).

Grid Cell Click Color

This specifies the color to be used for grid cells when they are clicked. Double-click in the color sample square to open a color selection chart.

Scale Style

This specifies a style for a question's scale header – the red-shaded area below.

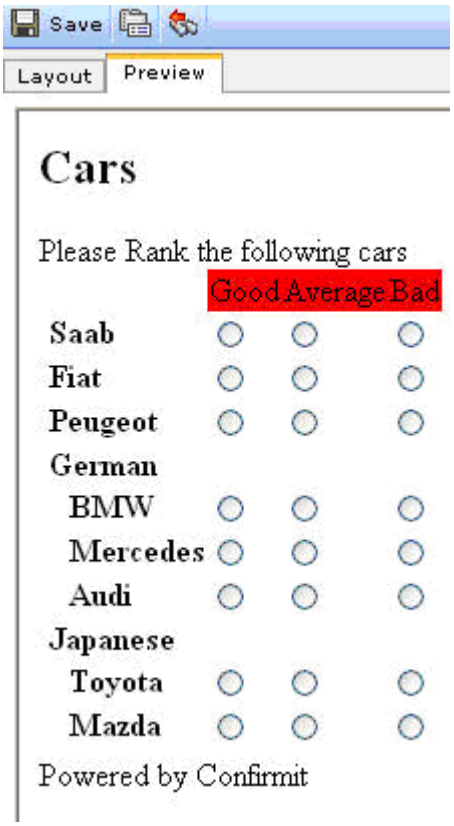


Figure 100 Example of the Scale style

Scale Group Header Label Style

This specifies the style for the group header labels for a scale. If this is not specified, then the general label style will be used.

Scale Group Answer Label Style

This specifies the style for the group answer labels for a scale. If this is not specified, then the general label style will be used. The Scale Group Answer Label Style can be overwridden by a style set directly onto specific answers.

Scale Bar Label Style

This specifies the style of a scale bar. If this is not specified, the general label style will be used. Note that scale bars should have a background color specified to be clearly visible (see Scale on page 248 for more information).

Card Sort Styles

The styles you select on this tab specify the look and layout of the card sorting functionality. When card sorting is used, the answers to the question are presented as a deck of playing cards, with the scale being represented by a series of areas. The respondent answers the question by moving the cards into the appropriate area. Use the style selection fields to specify the styles to be used for the cards before and after they are dragged, and the various parts of the Card Sort area (see The Advanced WI Features Tab on page 258 for more information).

Slider Styles

The styles you select on this tab specify the look and layout of the slider functionality.The Sliders feature allows respondents to click on and drag a slider pointer and drop it on the answer alternative of their choice, instead of selecting radio buttons (see The Advanced WI Features Tab on page 258 for more information).

Grid Bar Styles

This tab enables you to specify the styles that are to be used for the various parts of the layout when Grid Bars are selected to be used for a Grid question (see The Grid Object on page 221 for more information).

To select to use Grid Bars, go to the Advanced WI Features tab for the Properties page for the question, and check the Grid Bars box (see The Advanced WI Features Tab on page 258 for more information).

Charts Styles

The options on this tab allow you to set the styles to be used for HTML charts, and the dimensions and colors to be used for Google charts. To select the colors to be used, double-click in the appropriate color sample area to open a color selection chart, then select the color you wish to use.

Answer Buttons Styles

The options on this tab enable you to set styles for particular conditions for radio buttons and checkboxes.

Style on Specific Answer

This is not strictly part of a Question Skin, but be aware that you can override the style on specific answer alternatives by making changes in the Answers tab for the particular question.

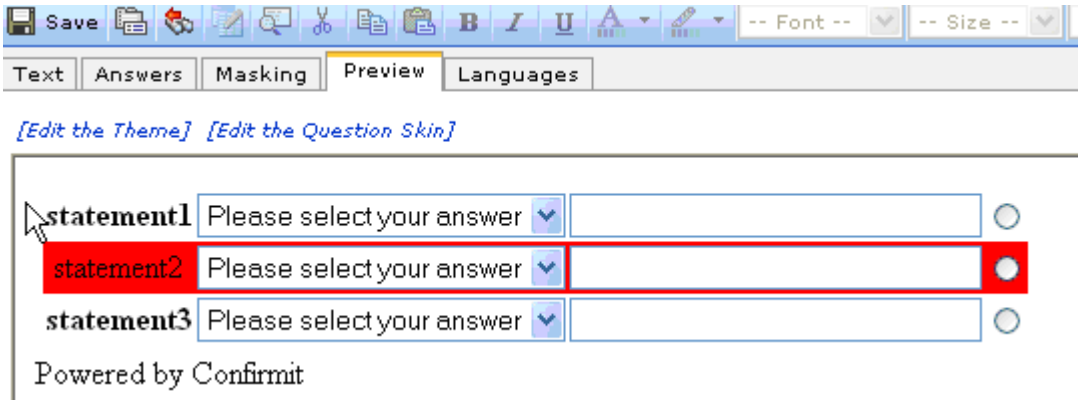


Figure 101 Example of a Style on Specific Answer

4.10.7.3.4. How to Edit the Question Components

All the visual components included in a question are set up and edited in the same way; in the Properties sheet for that component. Note that the different components have different properties listed.

To open the Properties sheet for a component, right-click on the component in the Layout page and choose **Properties**, or double-click on the component (point 1 in the figure below). To change the HTML style on which the component is based, open the drop-down list beside the Style Name field and select the desired style from the list. The definitions for all the styles in the drop-down list are stored in the **HTML Styles** folder in the questionnaire tree (point 2) (see HTML Styles on page 102 for more information)

In the example below, the HTML style specified for the Question Error component is called “error”. .

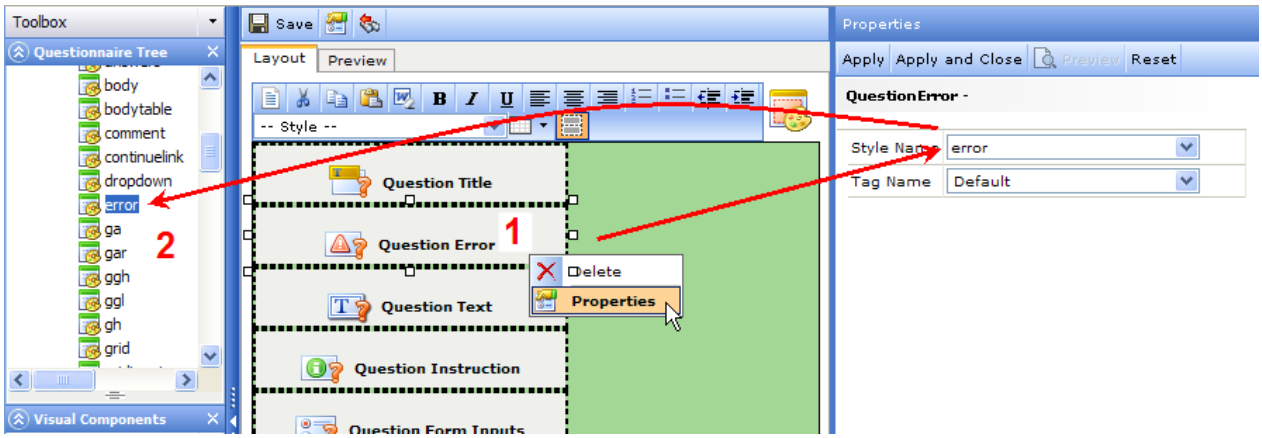


Figure 102 Editing a Question Visual Component

4.10.7.3.5. Applying Styles at Different Levels

You can apply styles to the content of the answer-section at three different levels:

1. Style applied to the entire answer section (Example: 'Answer section Style').
2. Style applied to one or more cells of the answer grid (Example: 'Answer Input Style').
3. Style applied to a specific input control within an answer grid cell (Example: 'Open Text Style').

In addition, styles can be applied to a specific answer, and these will then override (2) above.

Note: As browsers don't support styling in watermark text, HTML styling should not be applied to the labels for "Other" answers.

Styles at different levels can be applied simultaneously. However if the same style-element is specified at several levels, the most specific level will take precedence. For example, if the font size is specified in both 'Answer section Style' and 'Answer Input Style', the font size specified in the 'Answer Input Style' will be used in answer input cells.

Only one style can be applied at a time for level 2. This is because if more than one style was applied, there would be no way for the author to know which style will be used by each style-element, and there would be no way to determine which style would take precedence.

Note: Be aware that this means that a style might not be used even though it has been defined and specified. For example, if 'Answer Input Style' and 'Group Answer Input Style' are both defined, then 'Answer Input Style' will be applied to the regular answer cells and 'Group Answer Input Style' will be applied to the group answer cells. If font only is specified in 'Answer Input Style' it will not be applied to the group answer cells.

When the cell style to be used is evaluated, the following evaluation applies:

1. If a background color or width for a specific answer is specified, this will have the highest priority. Note also that this will not affect styles in general, and can be applied at the same time as other styles.
2. A style specified for an answer has the highest rank among the styles. Note that a style specified for a particular answer will apply BOTH for the label and for the input-part of the answer.
3. If no style is specified for the specific answer then 'Group Header Label Style', 'Group Answer Label Style', Right Answer Label Style' and 'Group Header Input Style' are next in rank.
4. Next are 'Alternating Answer Input Style' and 'Alternating Answer Label Style'.
5. Then 'Answer Input Style' and 'Answer Label Style'.
6. And finally (only for Grid and 3DGrid) are 'Grid Table Cell Style'.

4.10.7.4. HTML Styles

HTML Styles are applied to all elements on a survey page and to elements within other elements on a page. A style defines a specific look and feel, and includes specifications for colors, typography, size and positioning. One style can define how a question text is to look, a second how the error messages are to be displayed, a third how the question area (skin) should look etc.

You can create and use any number of styles in a survey, and each style can be used any number of times, in any number of survey pages. The HTML styles used in a survey are listed in the Questionnaire Tree toolbox's HTML Styles folder.

Note: As browsers don't support styling in watermark text, HTML styling should not be applied to the labels for "Other" answers.

To create a new style, the easiest method is to duplicate an existing style and edit the copy. To do this:

1. In the Survey Designer page, Questionnaire Tree toolbox, expand the HTML Styles folder.
2. Find a style that resembles the one you wish to create, right-click on it and select **Duplicate** from the drop-down menu.

   A copy is made of the selected style and placed in the HTML Styles folder. The new style will have the name "copy_of_<original style name>", and will be project-specific.
3. Right-click on the new style and select **Rename** from the drop-down menu, then give the style a logical name.

Note: Two or more styles can have the same name as long as the styles are of different type (class, ID, tag, complex). If you want the new style to have the same name as an existing style, you must change the style type before attempting to change the name.

4. Right-click on the style and select **Properties** to open the style's Properties page, and edit the style as required (see HTML Style Properties on page 105 for more information).

Note: All survey pages delivered will include a viewport meta tag to improve the experience on mobile devices for respondents. The following meta tag will be included in all survey pages delivered to respondents:
<meta name="viewport" content="width=device-width, initial-scale=1.0"/>

For more information on HTML Styles, visit the following websites:

http://msdn2.microsoft.com/en-us/library/ms535240.aspx

http://www.w3schools.com/css/css_reference.asp

http://www.htmlhelp.com/reference/css/properties.html

http://www.w3.org/TR/REC-CSS2/

http://www.blooberry.com/indexdot/css/propindex/font.htm

See the following sections for further information on the styles and style properties.

4.10.7.4.1. Working on an HTML Style

To change a style definition, in the Questionnaire Tree, scroll to the **HTML Styles** folder and double-click on the desired style (or right-click on the style and choose **Properties**) . You can edit several styles simultaneously by holding down the **CTRL** key on your keyboard while selecting them. While you work, an instant preview of the style based on the current settings will be displayed at all times at the bottom of the frame. Every style has a set of tabs as follows: Font, Background, Text, Position, Layout, Edges, Lists and Other.

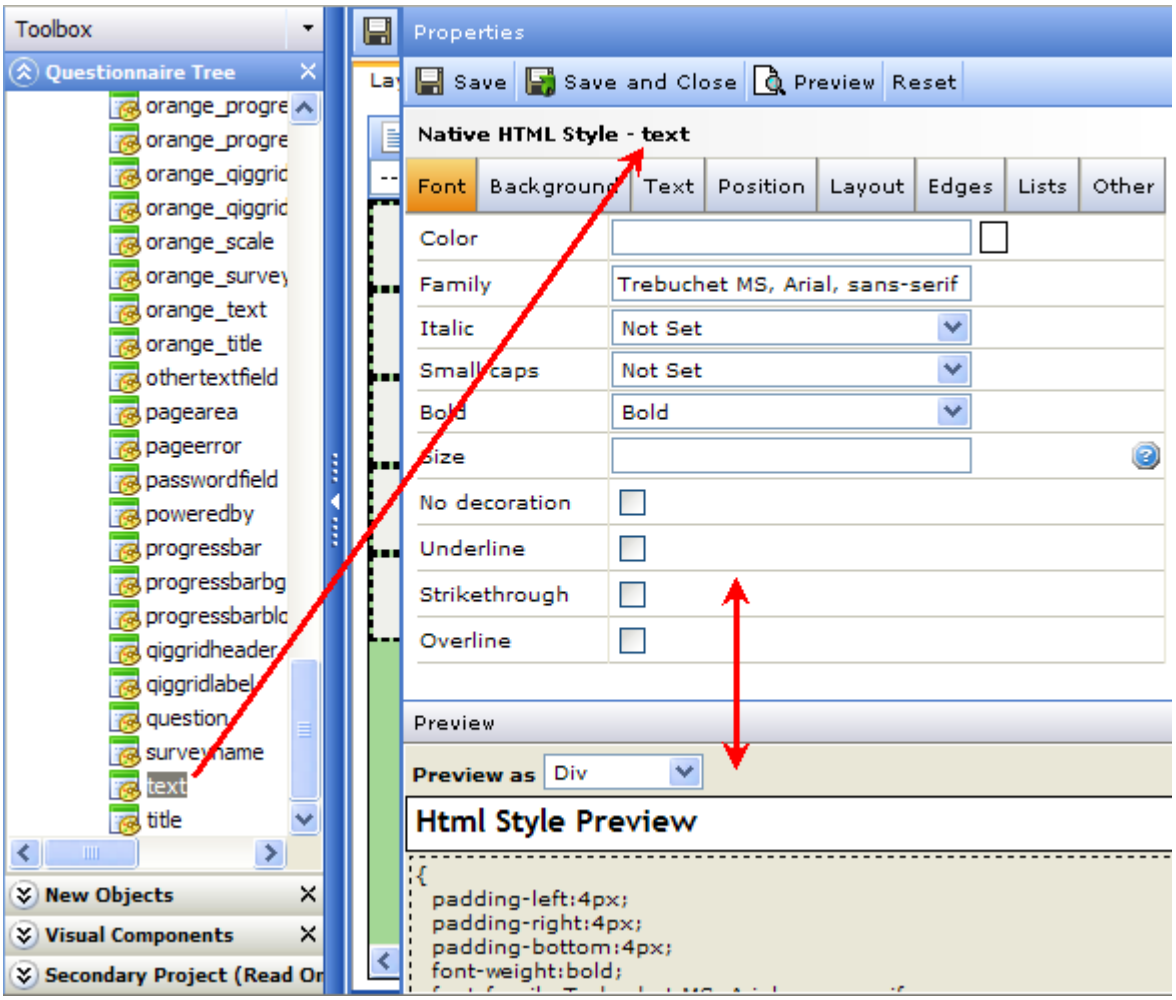


Figure 103 Working with HTML Styles

Note: The Position tab includes Minimum width and Minimum height properties. These properties ensure consistent width and height settings in different browsers and versions of browsers for surveys, portals and reports that have width and height settings specified in their styles.

4.10.7.4.2. Shortcut to Style Editing

When you are working inside your questions, you may need to change the current theme, question skin, or style. Confirmit provides a number of shortcuts directly into the areas where you will need to go. When previewing a question inside the Questionnaire Tree, you have direct access to both the current Theme and Question Skin via links at the top of the preview area.

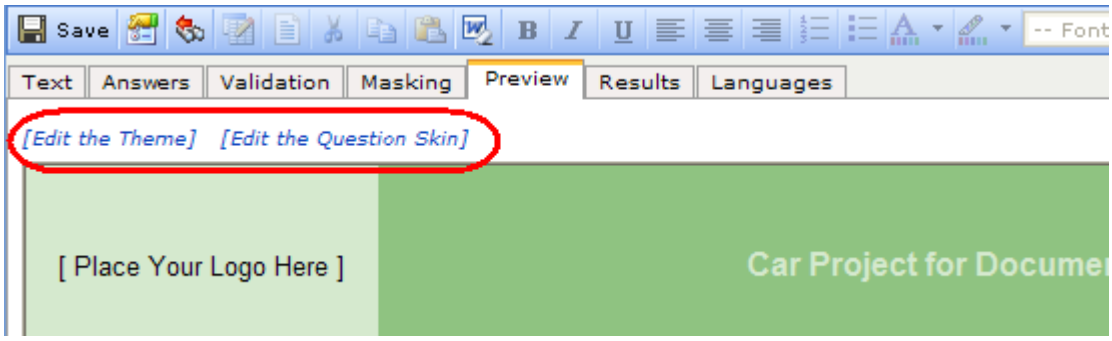


Figure 104 Shortcuts from Question Preview

When working with the question texts, you have direct access to the HTML styles for the current question title, question text, and question instructions.

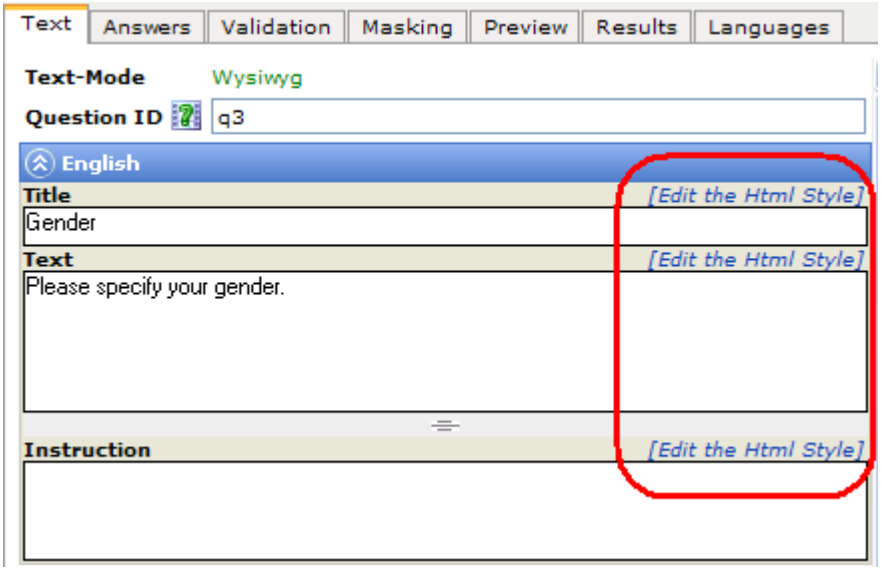


Figure 105 Shortcuts from Question Texts

When styles are specified anywhere in the style name fields, right-click on the text and choose **Edit this Question Skin** (or 'HTML Style' etc.) in the menu to go directly to the edit mode of that style.

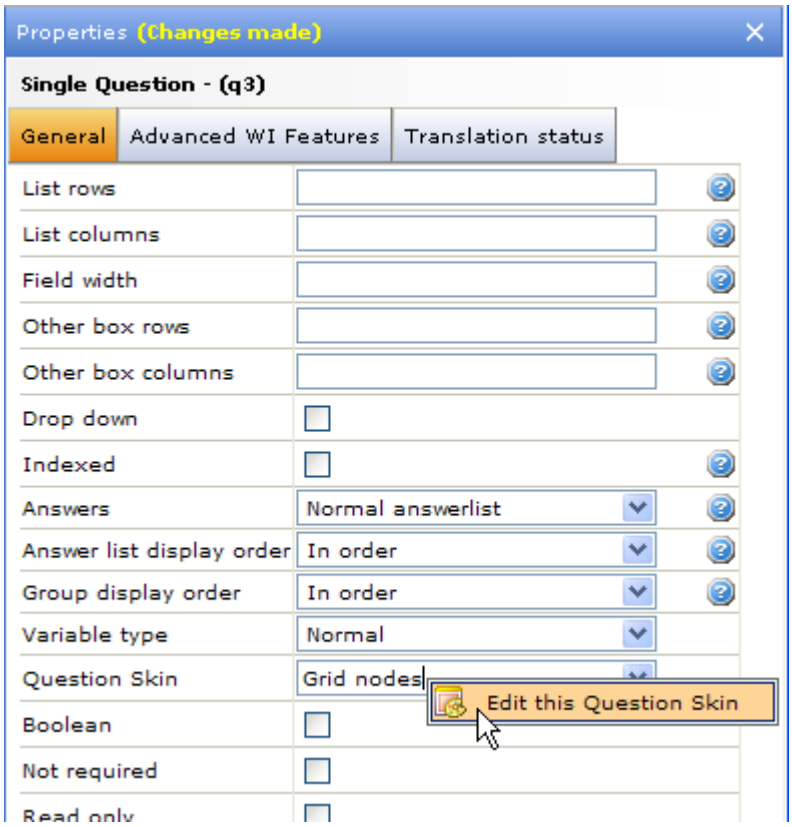


Figure 106 Shortcut to Styles

4.10.7.4.3. HTML Style Properties

The HTML Style Properties sheet contains eight tabs as follows.



Figure 107 The Style Properties sheet tabs

- **Font** - defines the font color, family, size etc. of the text used in the style (see HTML Style Properties > Font Tab on page 106 for more information).
- **Background -** defines the color and background image (if used) for the style (see HTML Style Properties > Background Tab on page 107 for more information).
- **Text** - defines letter spacing, indents, alignments etc. for any text used in the style .
- **Position** - defines the position on the page for elements using this style .
- **Layout** - defines how items using this style are to appear on the page .
- **Edges** - defines how the margins and border lines for objects using the style are to look .
- **Lists** - defines how any lists using the style are to look .
- **Other** - lists other properties that do not fall naturally under the other tabs .

The properties you set in these tabs are applied to any survey page objects to which the style you are currently editing is applied.

Note: Many of the style properties have Not Set as an option. This option will allow the property to use its default value unless the property is controlled by another style, in which case the property will use the setting specified by that style. If a setting other than Not Set is selected, then the property will be locked to the selected setting, irrespective of settings specified by other styles.

Note: The property sheet for HTML styles in Authoring, Panel Portals and Reportal now support most of the CSS3 features, such as gradients, shadows, multiple borders etc. CSS3 style properties are indicated by a 3 icon beside the property.

HTML Style Properties > Font Tab

These properties are applied to any text that the style is applied to.

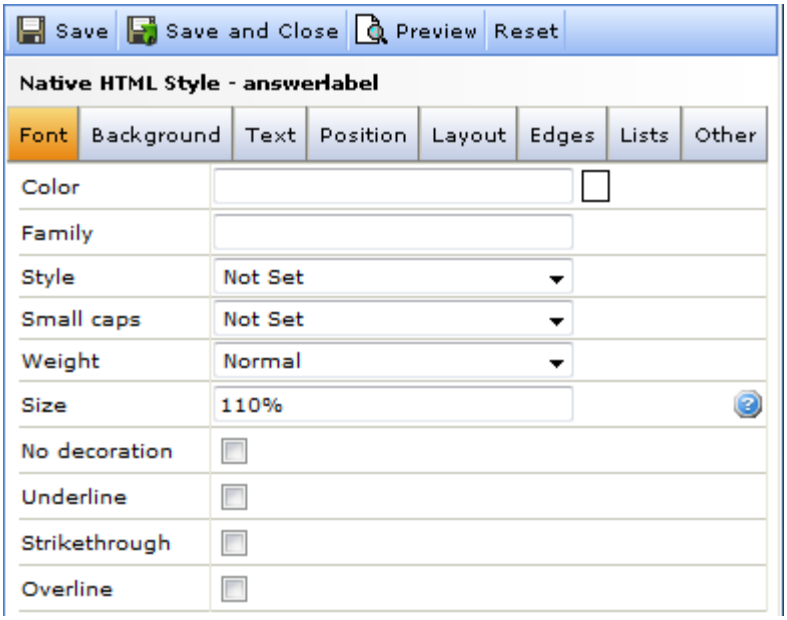


Figure 108 The HTML Style Properties > Font tab

The properties are as follows:

- **Color** - specifies the color of any text using this style. Type the color's name or code into the field or double-click on the color sample box to open a color selection window.
- **Family** - the font family of any text using this style. Type the name into the field.
- **Style**- select the desired style for the text.
- **Small caps** - applies the SMALL CAPITALS property to the selected text.
- **Weight**- select the desired font weight.
- **Size** - defines the size of the characters to be used in the text for this style. Type a size into the field and apply/save the changes.
- **No Decoration -** many sites do not for example underline links as part of their style template. Check this box to hide all text decorations (underline etc) in texts using this style.
- **Underline** - check the box to apply an underline to the text.
- **Strikethrough** - check the box to apply a ~~strikeout~~ line to the text.
- **Overline** - check the box to apply an overline to the text.

HTML Style Properties > Background Tab

The properties on this tab set the background area details for the selected object.

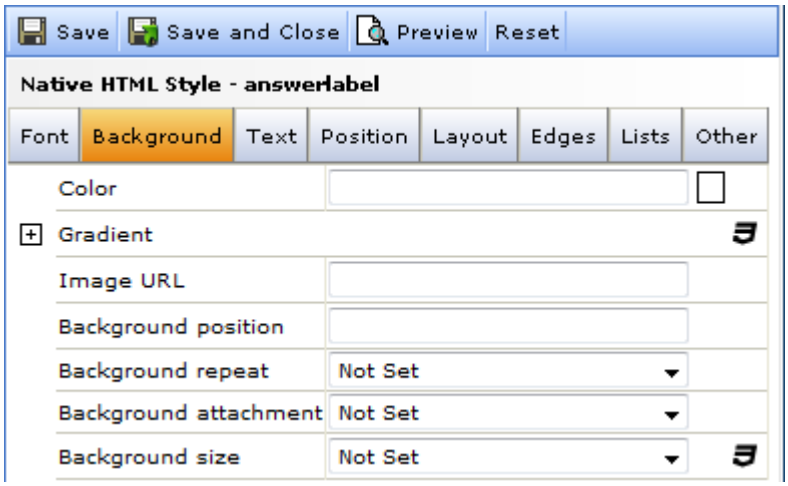


Figure 109 The HTML Style Properties > Background tab

- **Color** - specifies the color of the background.
- **Gradient -** Click the + button to expand the available properties. When options are selected for these properties, a color gradient will be applied to the style background.
- **Image URL** - if a background image is to be used, type the URL to the image here.
- **Background position** - specifies the "start" position of the background image.
- **Background repeat** - specifies if and how the background image is repeated if the image is smaller than the object it is attached to. The options are:
    - **Not set** - (default).
    - **NoRepeat** - the image is only shown once in the object.
    - **Repeat** - the image repeats in both directions.
    - **RepeatX** - the image only repeats in the X (vertical) direction.
    - **RepeatY** - the image only repeats in the Y (horizontal) direction.
    - **Inherit** - the image inherits the Repeat property from the stylesheet.
- **Background attachment** - specifies how the background image is to be attached to the object. The options are:
    - **Not set** - (default).
    - **Fixed** - the image is fixed within the viewing area.
    - **Scroll** - the image moves with the object as the respondent scrolls the questionnaire page.
    - **Inherit** - the image inherits the Attachment property from the stylesheet.
- **Background size -** sets the size of the style background.

HTML Style Properties > Text Tab

The properties on this tab set the details for text in the selected object. Note that these properties are in addition to the Font properties.

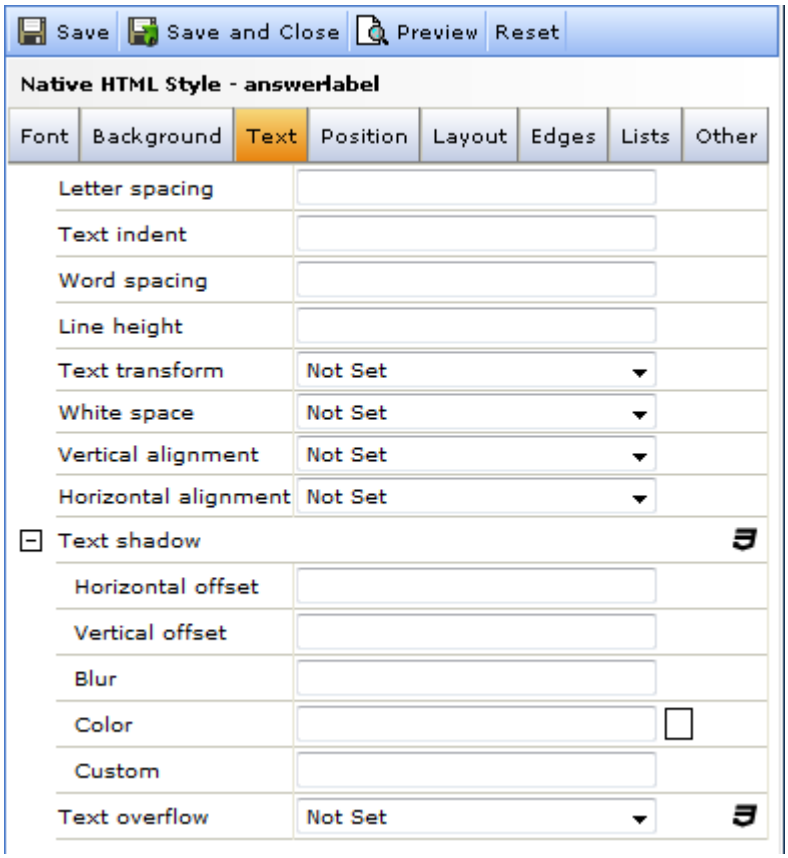


Figure 110 The HTML Style Properties > Text tab

- **Letter spacing** - specify the spacing between the letters, in pixels, for the object.
- **Text indent** - specify, in pixels, the indent to be used for the first line of text in the object.
- **Word spacing** - specify the spacing between the words, in pixels, for the object.
- **Line Height -** specify the spacing between the text baselines. The line height is calculated by multiplying the element's font size by the given value. Percentage values are relative to the element's font size. Negative values are not permitted.
- **Text transform** - specify how the text in the object is to be the rendered. The options are:
    - **NotSet** - (default) makes no specific setting at this level. This allows the next level up to specify the setting.
    - **Capitalize** - makes the first letter of every word upper-case.
    - **Lowercase** - makes all the letters lower case.
    - **Uppercase** - makes all the letters upper case.
    - **None** - text is not transformed.
- **White space** - defines how lines of text are to be wrapped within the object. The options are:
    - **NotSet**- (default) makes no specific setting at this level. This allows the next level up to specify the setting.
    - **Normal** - white space is ignored by the browser.
    - **NoWrap** - line breaks are suppressed. Content does not wrap to the next line.
    - **Pre** - white space is preserved by the browser.

- **Vertical alignment** - specifies how the text is to be positioned vertically within the object. The options are:
    - **NotSet**- (default) makes no specific setting at this level. This allows the next level up to specify the setting.
    - **Baseline** - aligns the baseline of the element with the baseline of the parent element.
    - **Bottom** - the bottom of the element is aligned with the lowest element on the line.
    - **Middle** - the element is placed in the middle of the parent element.
    - **Subscript** - aligns the element as if it was subscript.
    - **Superscript** - aligns the element as if it was superscript.
    - **Text Bottom** - the bottom of the element is aligned with the bottom of the parent element's font.
    - **Text Top** - the top of the element is aligned with the top of the parent element's font.
    - **Top** - the top of the element is aligned with the top of the tallest element on the line.
    - **Inherit** - specifies that the value of the vertical-align property is to be inherited from the parent element.
- **Horizontal alignment** - specifies how the text is to be positioned, horizontally, within the object. The options are:
    - **NotSet**- (default) makes no specific setting at this level. This allows the next level up to specify the setting.
    - **Left -** places the text at the left end of the line (see the note below).
    - **Centered -** places the text at the center of the line.
    - **Right -** places the text at the right end of the line (see the note below).
    - **Justified -** within reason, this setting spreads the text across the width of the line. If the text requires considerably less space than is available, left alignment will be used by default.
- **Text shadow -** the following properties allow you to add a shadow to the text and set the shadow's parameters.
    - **Horizontal offset -** type in a value in pixels (px) for the shadow horizontal offset. A + value puts the shadow to the right of the text, a - value puts the shadow to the left.
    - **Vertical offset -** type in a value in pixels (px) for the shadow vertical offset. A + value puts the shadow below the text, a - value puts the shadow above.
    - **Blur -** the shadow can have a hard edge, or the edge can be blurred. Type in a value in pixels (px) for the shadow blur.
    - **Color -** select the shadow's color.
    - **Custom -** you can specify any number of shadows. Write the requirements separated by commas.
- **Text overflow -** In some cases text will have to be clipped, for example when it overflows the element’s box. When this happens, you may want to leave a visual “hint” to the user that the text has been clipped. The most commonly used indicator is the ellipsis character: "…". The options are:
    - **Not set -** the indicator uses the setting of the next highest style.
    - **Clip -** the text is merely clipped; no indication is given.
    - **Ellipses -** the ellipses character is used.
    - **Other -** choose a custom character - a further field opens in which you can input the character.

Note: The Horizontal Alignment property contains two options that are dependant on the type of language in use. Left (right in RTL) and Right (left in RTL) will automatically place the text at the opposite end of the line in the event a right-to-left language is in use.

HTML Style Properties > Position Tab

The properties on this tab set the position for the element.

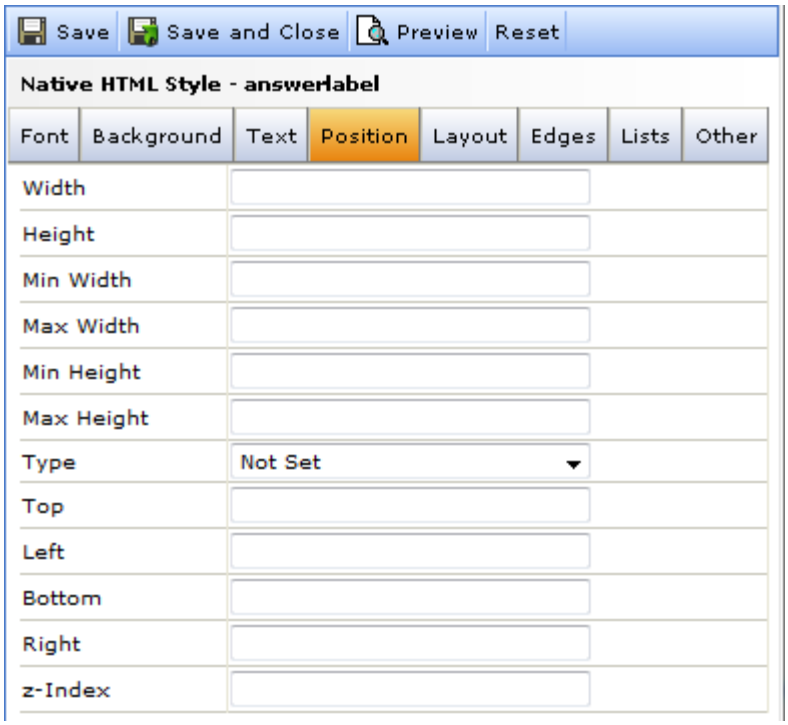


Figure 111 The HTML Style Properties > Position tab

- **Width** - sets the width of an element.
- **Height** - sets the height of an element.
- **Min Width** - type in a value. This ensures a consistent width setting in different browsers and versions of browsers for surveys, portals and reports that have width settings specified in their styles.
- **Max Width** - type in a value. This ensures a maximum width setting irrespective of the browser or browser version for surveys, portals and reports that have width settings specified in their styles.
- **Min Height** - type in a value. This ensures a consistent height setting in different browsers and versions of browsers for surveys, portals and reports that have height settings specified in their styles.
- **Max Height** - type in a value. This ensures a maximum height setting irrespective of the browser or browser version for surveys, portals and reports that have height settings specified in their styles.
- **Type** - places an element in a Static, Relative or Absolute position. When Relative or Absolute is selected, five additional properties become available.
    - **Static** - (Default) an element with this position type always has the position defined by the normal flow of the page. A Static element ignores any top, bottom, left or right declarations.
    - **Relative** - this position type moves an element relative to its normal position. Additional properties are Top, Left, Bottom, Right and z-Index. For example, "Left:20" adds 20 pixels to the element's "Left" position. The z-Index property specifies the stack order of the element; an element with greater stack order is always in front of an element with a lower stack order.
    - **Absolute** - the element is positioned at the specified coordinates relative to its containing block. The element's position is then specified with the Top, Left, Bottom, Right and z-Index properties. The z-Index property specifies the stack order of the element; an element with greater stack order is always in front of an element with a lower stack order.

HTML Style Properties > Layout Tab

The properties on this tab set the layout for the selected object.

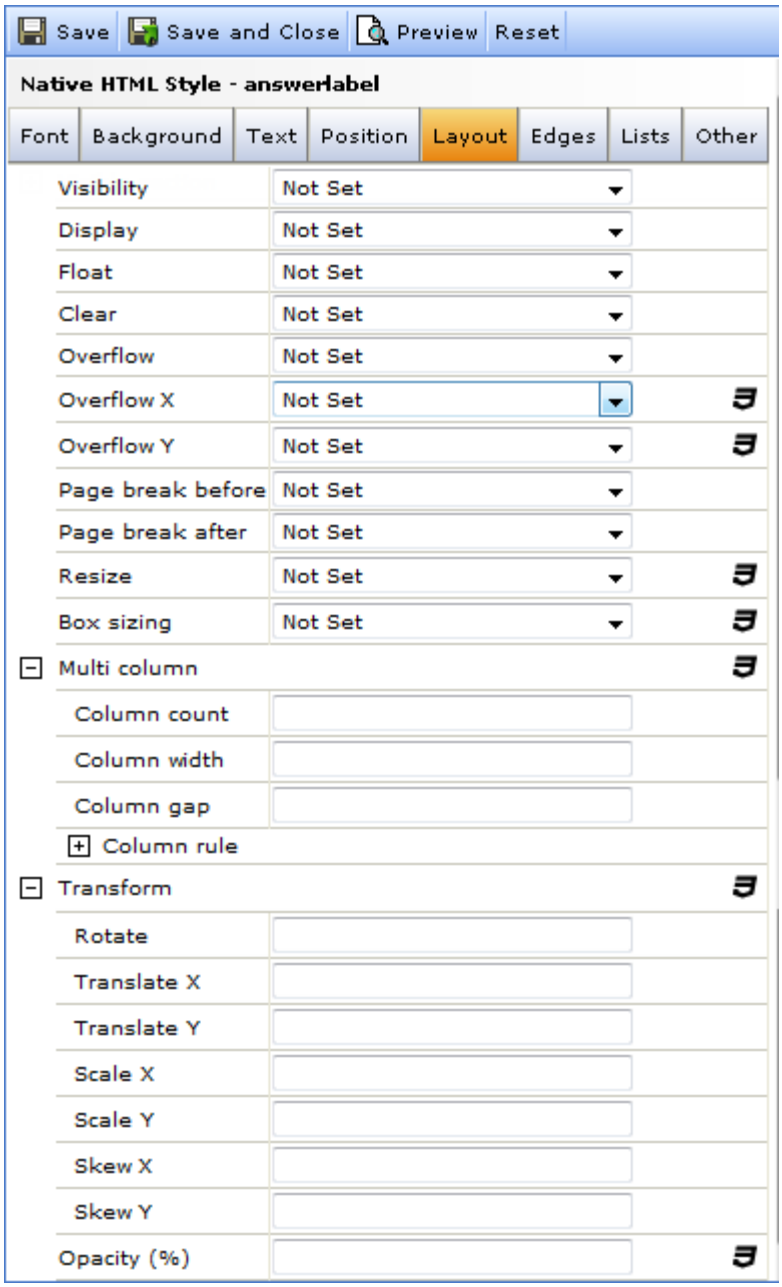


Figure 112 The HTML Style Properties > Layout tab

- **Visibility** - this property specifies whether or not the content of the object, including the borders and backgrounds, is to be displayed. The options are:
    - **NotSet**(default) makes no specific setting at this level. This allows the next level up to specify the setting.
    - **Visible** - the object content is visible.
    - **Hidden** - the object content is hidden.

- **Display** - specifies how the object is displayed. The options are:
    - **NotSet**(default) makes no specific setting at this level. This allows the next level up to specify the setting.
    - **Inline** - the object is rendered as an inline element.
    - **Block** - the object is rendered as a block element.
    - **None** - the object is not rendered.
- **Float** - sets where an image or text is to appear within another element.
    - **NotSet**(default) makes no specific setting at this level. This allows the next level up to specify the setting.
    - **None** - (Default) the image or text will be displayed where it occurs in the HTML code.
    - **Left** - the image or text moves to the left in the parent element.
    - **Right** - the image or text moves to the right in the parent element.
- **Clear** - image and text elements that appear within another element are called floating elements. The Clear property defines whether there are any sides of an element where other floating elements are not allowed to be placed.
    - **NotSet**(default) makes no specific setting at this level. This allows the next level up to specify the setting.
    - **Both** - no floating elements are allowed on either the left or right sides.
    - **Left** - no floating elements are allowed on the left side.
    - **Right** - no floating elements are allowed on the right side.
    - **None** - (Default) allows floating elements on both sides.
- **Overflow** - specifies how the content of the object is to be managed when the content exceeds the height or width of the object. The options are:
    - **NotSet**(default) makes no specific setting at this level. This allows the next level up to specify the setting.
    - **Auto** - the content is clipped and scroll bars added only when necessary.
    - **Scroll** - the content is clipped and scroll bars are added even if the content does not exceed the dimensions of the object.
    - **Visible** - the content is not clipped and scrollbars are not added.
    - **Hidden** - content that exceeds the dimensions of the object is not shown.
- **Overflow X -** specifies how the content of the object is to be managed when the content exceeds the width of the object. Note that this property only controls the horizontal details. The options are the same as for **Overflow** above.
- **Overflow Y -** specifies how the content of the object is to be managed when the content exceeds the height of the object. Note that this property only controls the vertical details. The options are the same as for **Overflow** above.
- **Page break before** - if you wish to specify whether or not the object to which this style is applied is to have a page-break before, select the appropriate item from the drop-down list. The options are:
    - **NotSet**(default) makes no specific setting at this level. This allows the next level up to specify the setting.
    - **Always** - always inserts a page break before the object.
    - **Auto** - neither forces nor forbids a page break before the object.
    - **Avoid** - does not allow a page break before the object.
    - **Left** - always inserts a page break before the object if the object will otherwise be on a "left" page. I.e. this forces the object to be on a "right" page.

  - **Right** - always inserts a page break before the object if the object will otherwise be on a "right" page. I.e. this forces the object to be on a "left" page.

- **Page break after** - if you wish to specify whether or not the object to which this style is applied is to have a page-break after, select the appropriate item from the drop-down list.
  - **NotSet**(default) makes no specific setting at this level. This allows the next level up to specify the setting.
  - **Always** - always inserts a page break after the object.
  - **Auto** - neither forces nor forbids a page after the object.
  - **Avoid** - does not allow a page break after the object.
  - **Left** - always inserts a page break after the object if the object is on a "left" page.
  - **Right** - always inserts a page break after the object if the object is on a "right" page.
- **Resize -** allows you to specify if a box is resizable, and in which directions.
- **Box sizing -** specifies how the browser is to calculating the width of an element.
  - **Not set -** box-sizing is set by the next level up.
  - **Content-box -** the browser calculates width and height, adding the border-width, border-height and padding to the size of the box.
  - **Border-box -** the browser renders the box with the specified width and height, and adds the border and padding inside the box thereby reducing the area available for the text.
- **Multi column -** text can be arranged in multiple columns, as in a newspaper.
  - **Column count -** type in the desired number of columns.
  - **Column width -** type in the desired column width.
  - **Column gap -** type in the desired gap between the columns.
  - **Column rule -** sets the color, style, and width of the dividing lines between the columns.
- **Transform -** allows you to set a number of transformations on the content of the style.
  - **Rotate -** rotates the content.
  - **Translate X/Y -** moves the content the specified distance. + values move the content to the right, - values to the left.
  - **Scale X/Y -** changes the scale of the style content in the X and/or Y directions.
  - **Skew X/Y -** allows you to change the angle of the content by moving one of the edges relative to the opposite parallel edge.
- **Opacity -** set a percent value to make the style content opaque.

HTML Style Properties > Edges Tab

The properties on this tab set the details for the selected object's edges.

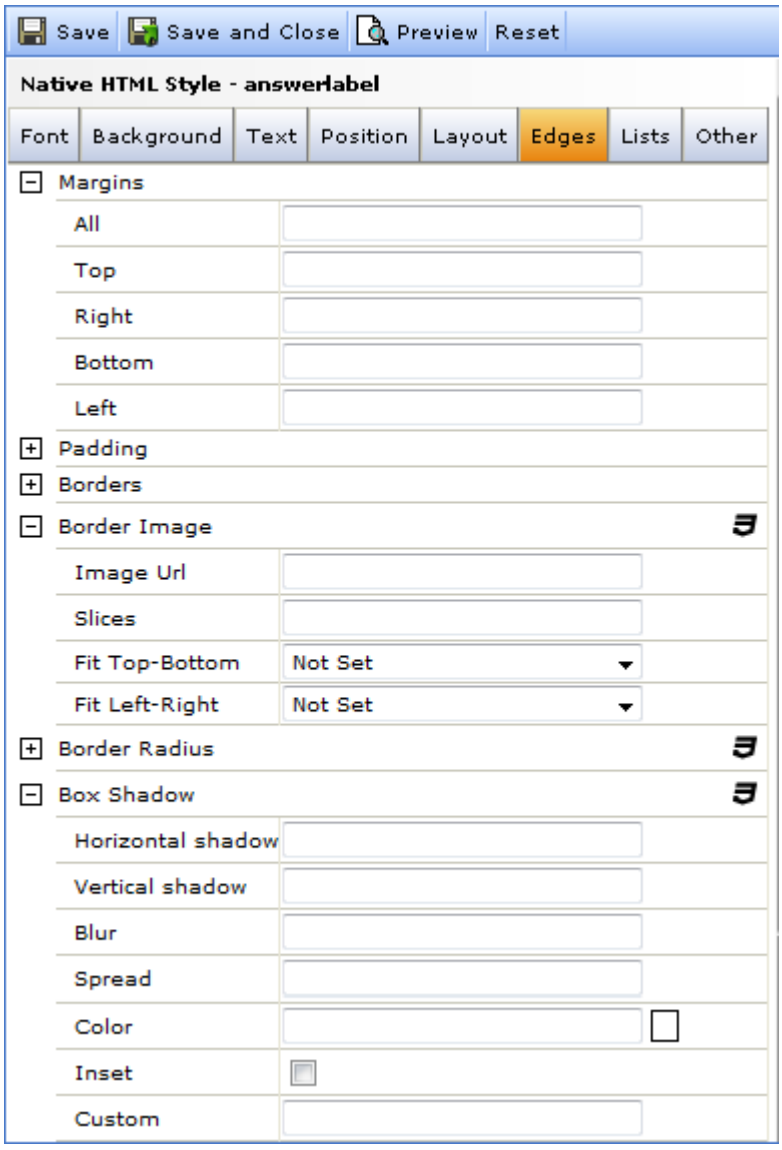


Figure 113 The HTML Style Properties > Edges tab

- **Margins** - an object can have margins around it (outside the object) to provide space between adjacent objects. Click the + icon to open the property so you can access the margin setting fields, then type a value, in pixels, into the appropriate fields. Set all simultaneously, or each individually.
- **Padding** - an object can have padding around its edges(inside the object) to provide space between the object's borders and it's contents. Click the + icon to open the property so you can access the padding setting fields, then type a value, in pixels, into the appropriate fields.Set all simultaneously, or each individually.
- **Borders** - you can set borders on an object. For each border (top, bottom, left and right) you can set the color, style and width of the line to be used. Note that you can set each individually, or if all are to be identical you can set all simultaneously.
    - **Color** - if the Border Width property is set to a value greater than 0, then the resulting border line will have the color specified here.
    - **Style** - use the Line Style property to specify the type of line you wish to use for the border; solid, dotted etc.

- **Width** - The Border Width property sets the thickness of the border line, in pixels. If you do not want the border line to be displayed, set the width to 0 or leave it blank.

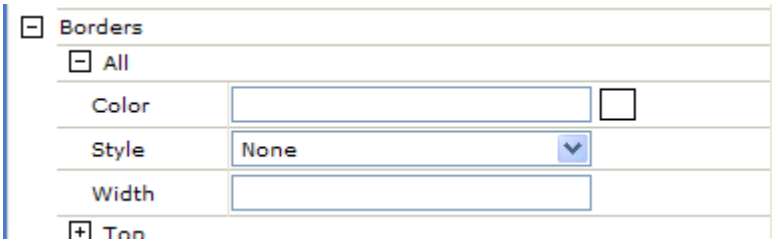


Figure 114 The Borders > All properties expanded

- **Border image -** define an image to be used instead of the normal line-border for an element.
  - **Image URL -** type in the URL to the image that is to be used.
  - **Slices -** specifies the inward offsets from the top, right, bottom, and left edges of the image, dividing it into nine regions: four corners, four edges and a middle. The middle image part is discarded (treated as fully transparent) unless the fill keyword is present.
  - **Fit... -** specify how the image is to be fitted into the border length; repeated, stretched etc.
- **Border radius -** you can apply rounded corners to the border. You can set the radii for all the corners simultaneously or each corner separately.
- **Box shadow -** you can apply multiple drop shadows (outer or inner) on box elements.
  - **Horizontal offset -** type in a value in pixels (px) for the shadow horizontal offset. A + value puts the shadow to the right of the box, a - value puts the shadow to the left.
  - **Vertical offset -** type in a value in pixels (px) for the shadow vertical offset. A + value puts the shadow below the box, a - value puts the shadow above.
  - **Blur -** the shadow can have a hard edge, or the edge can be blurred. Only positive values are allowed, and the larger the value, the more the shadow's edge is blurred. Type in a value in pixels (px).
  - **Spread -** a positive value will cause the shadow shape to expand in all directions, while a negative value will cause the shadow shape to contract.
  - **Color -** select the shadow's color.
  - **Inset -** check if you want the shadow to be drawn inside the element. An inner box-shadow casts a shadow as if everything outside the padding edge were opaque. The inner shadow is drawn inside the padding edge only: it is clipped outside the padding box of the element.
  - **Custom -** you can specify any number of shadows. Write the requirements separated by commas.

HTML Style Properties > Lists Tab

The properties on this tab set the details for how list item markers are to be displayed in the selected object.

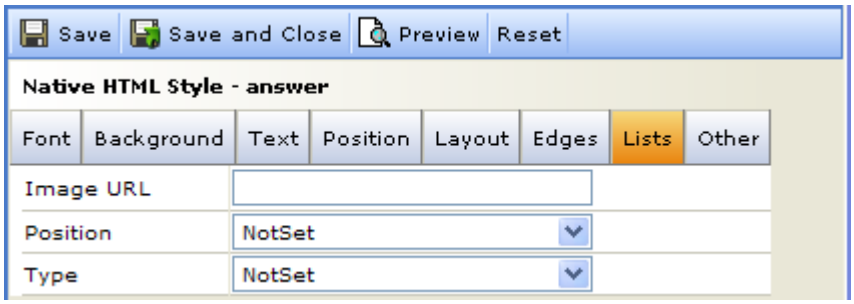


Figure 115 The HTML Style Properties > Lists tab

- **Image URL** - if a list-item marker is to be used for the object, type the URL to the image that is to be used as the marker.
- **Position** - specifies how the list-item marker image is to be positioned relative to the object's content. The options are:
    - o **NotSet**- (default) no specification is made.
    - o **Inside** - the list-item marker image is positioned inside the object and any wrapping text is aligned under the marker.
    - o **Outside** - the list-item marker image is placed outside the text, and any wrapping text is not aligned under the marker.
- **Type** - specifies the type of the line-item marker to be used for the object.

HTML Style Properties > Other Tab

The properties on this tab allow you to set additional details for the object for which the style is used.

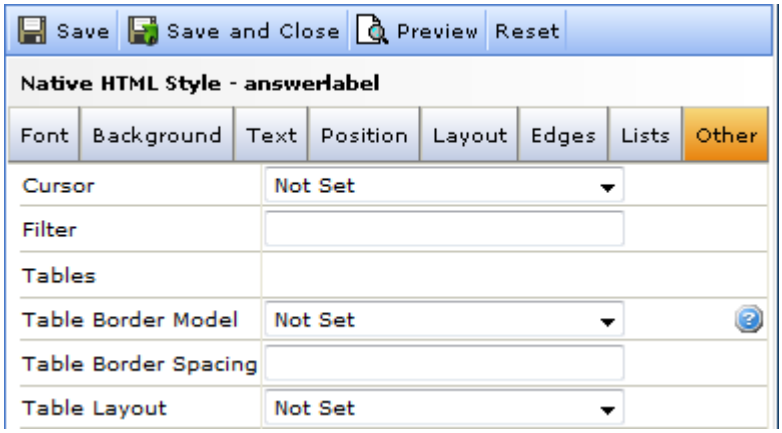


Figure 116 The HTML Style Properties > Other tab

- **Cursor** - specifies the form of cursor that is to be displayed as the mouse pointer moves over the object.
- **Filter** - used to create a gradient color "shading" on the background where the html style is used. Type the following code into this field:

```
filter:Progid:DXImageTransform.Microsoft.Gradient(endColorstr='#BDBABD',
startColorstr='#9C969C', gradientType='0'
```

and change the color codes to those you wish to use.

- **Tables Border Model** - sets whether the table borders are collapsed into a single border or detached as in standard HTML.
    - o **Not Set -** (default) makes no specific setting at this level. This allows the next level up to specify the setting.
    - o **Collapse** - borders are collapsed into a single border when possible..
    - o **Separate** - borders are detached.
- Table border spacing - specifies the table spacing.
- **Table Layout** - specifies whether the table layout is fixed or automatic. The options are:
    - o **NotSet -** (default) makes no specific setting at this level. This allows the next level up to specify the setting.
    - o **Auto** - the column width is set by the widest unbreakable content in the column cells.
    - o **Fixed** - table and column widths are set either by the sum of the widths on the column objects, or if these are not specified, by the width of the first row of cells. If no width is specified for the table, it renders by default with width = 100%.

4.10.7.5. Mobile Layout

In **Designer > Survey Settings > Survey Channels**, when the Web Survey channel is enabled, two survey renderer sub-options become available; Smartphones and Generic mobiles. These options adapt the survey layout for optimal display on mobile phones. You open the Mobile Survey Layout Editor page (within which you edit the settings for the mobile layout) by double-clicking on the **Mobile Layout** item in the **Survey Layout** folder (arrowed in the figure below) or by clicking the **Edit Mobile Layout** button in the Designer toolbar. .

This Mobile Layout is project-specific, and will it be used by default if the survey detects that a respondent is responding via a mobile device and no other mobile themes are specified.

You can also set up a mobile layout for each theme in the Themes folder. To access the mobile layout for a theme, right-click on the theme and select **Edit Mobile Layout Settings**.

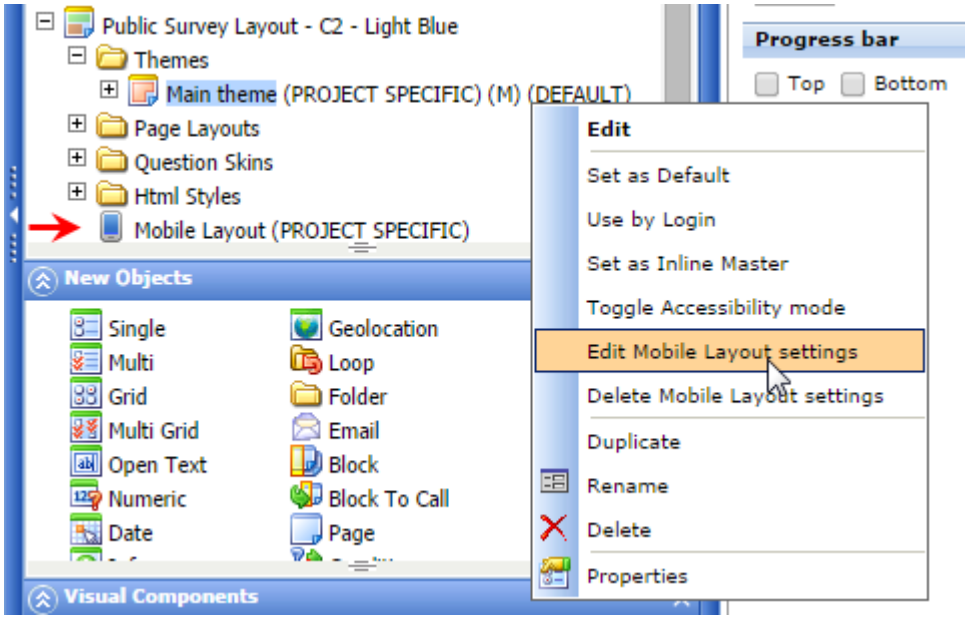


Figure 117 Accessing the mobile layout settings for a theme

Once you have set up a mobile layout for a theme, an (M) will be displayed beside the theme name in the questionnaire tree toolbox (see the figure above). This mobile layout will then be used in preference to the default Mobile Layout when that theme is selected to be used. Also, the **Delete Mobile Layout Settings** option will appear in the menu, allowing you to remove the layout for the theme and revert to the default layout.

The settings and options available are described in the Phone Options section in the Preparing for Data Collection chapter (see The Survey Channels Tab Mobile Phone Options on page 496 for more information)

4.10.7.6. Applying a Survey Layout to a Survey

When creating a new survey, you can specify the required Survey Layout on the first page of the creation procedure. For existing surveys you can specify a Survey Layout at any time under **Survey Settings**.

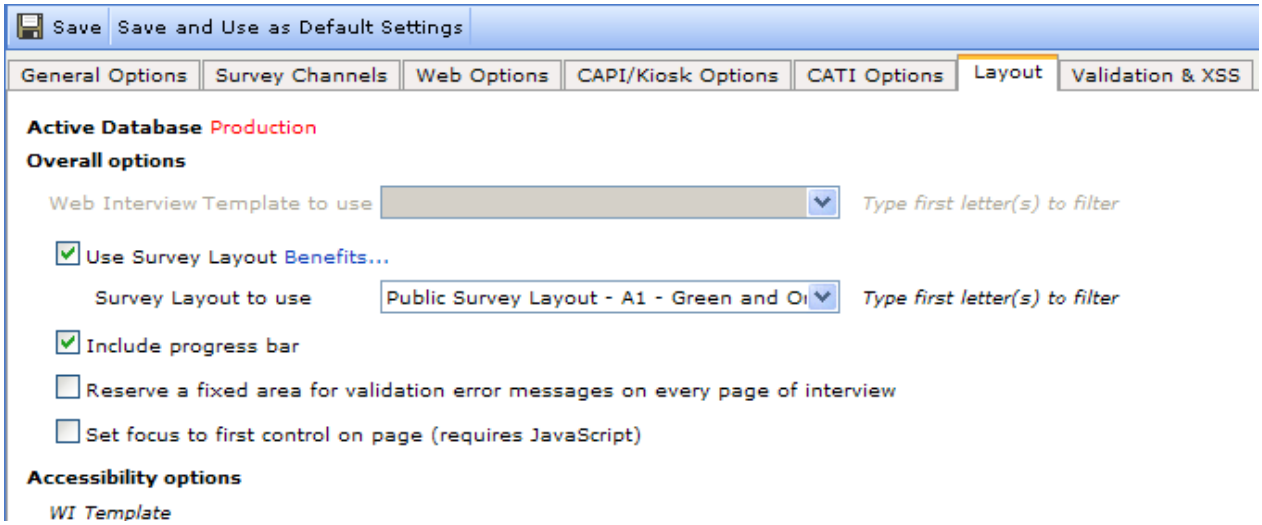


Figure 118 Apply a Survey Layout to a survey

Under the **Layout** tab, select **Use Survey Layout** and select the Survey Layout you wish to apply to the current survey from the drop-down list. Remember that you must re-launch the survey for the interview pages to be updated with the new layout.

Note that if you have Write permission for the Survey Layout, or if you have company-wide administrator permission, you can check where a survey layout has been used. To do this:

1. Open the survey layout (go to the **Home > Survey Layouts** command and click on the desired layout in the list).
2. In the Layout and Styles toolbox, right-click on the root node (the survey name at the top of the list).
3. Select **View projects using this layout** from the drop-down menu.

   A window opens listing the surveys using the selected survey layout. From here you can open the surveys using the layout by clicking on the appropriate Survey ID link.

4.10.7.7. Dynamic Survey Layout

Instead of specifying a certain Theme or Page Layout for an interview page, you can base the look and feel of that page on the respondent's answer to a previous question, or a background question, or a combination of these. As you can use the same technique on themes and page layouts, the question skin level and on the style level, this enables Confirmit users to tailor the survey layout to each individual respondent.

Note: The Dynamic Survey Layout functionality is not supported in the CAPI/Kiosk console. Surveys that include dynamic layout can be run on a CAPI/Kiosk console, but without the dynamic functionality.

In this example, the Age and Gender questions have been placed within a Page object (see The Page Object on page 303 for more information), which has been named "Age and Gender". We will use the Page Layout property of the “Age and Gender” Page object to display the Age and Gender questions slightly differently based on the respondent's region.

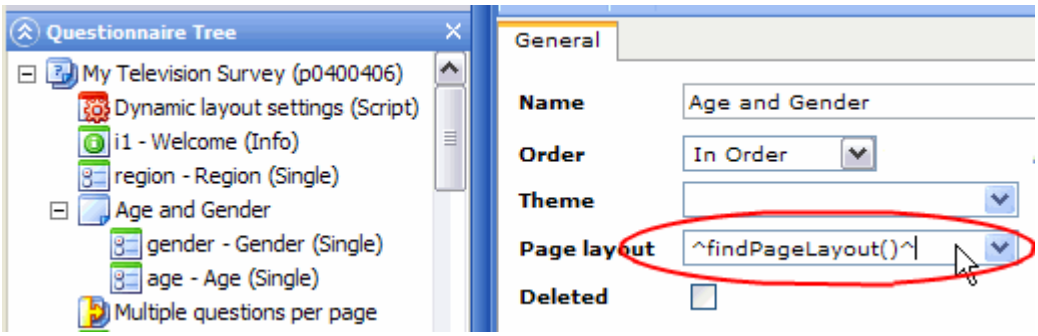


Figure 119 Setting up a dynamic survey layout

Do this by calling a function from the Page Layout field of the Page object. The carets (hats) tell Confirmit that the text between them is not the name of a layout, but is coding that is to be interpreted. In the figure above, a function called “findPageLayout” is called, which will evaluate which Page Layout is to be used for this page.

Inside the “Dynamic layout settings (Script)” object (script can be placed anywhere in the tree), type the following code:

```
function findPageLayout()
{
 if (f("region").get()=='EU')
  return "two questions diagonal"
 else
  return "two questions"
}
```

A function is a group of code lines that will execute each time the function is called. A function can perform checks or controls, and then set (normally hidden) questions based on the result. Alternatively, as in this case, the function can return the result of its evaluation to the place where the function call was made. In this example the function checks the current respondent's answer to the region question, returning Page Layout name “two questions diagonal” if the respondent is from Europe. If the respondent comes from any other region, the Page Layout name “two questions” is returned.

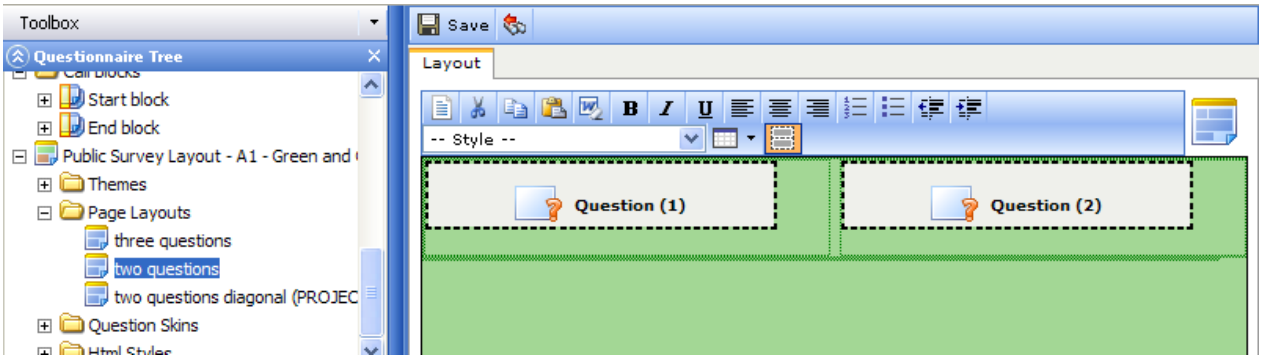


Figure 120 The "two questions" page layout

The “two questions” page layout displays two questions next to each other. This will be the layout used for all respondents who have specified a region other than Europe.

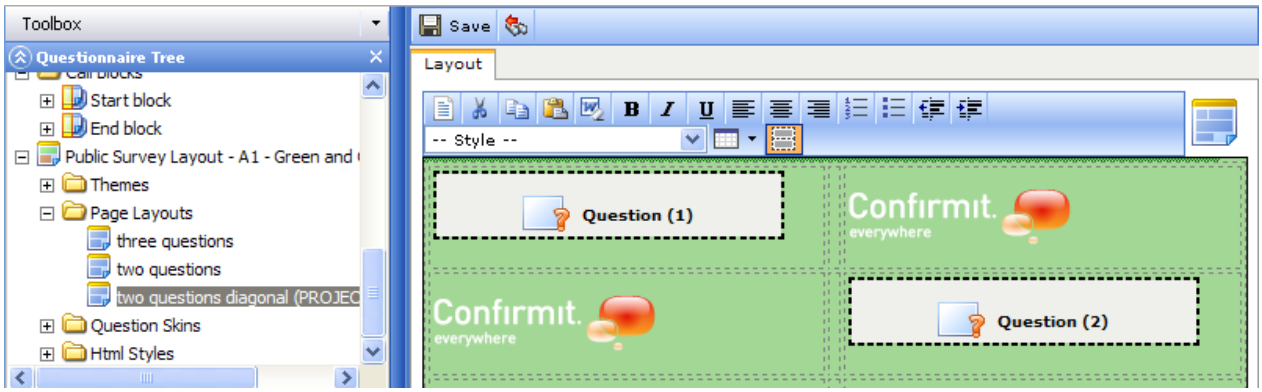


Figure 121 The "two questions diagonal" page layout

The “two questions diagonal” page layout displays the first of two questions in the upper left corner of the question area (question skin), and the second question (here Age) in the lower right corner. The Confirmit logo will be displayed in the other two cells (see the figure above). This layout is then used for all respondents who have specified the region as Europe.

For a respondent who selects any region except Europe, the Gender and Age page is displayed as below.

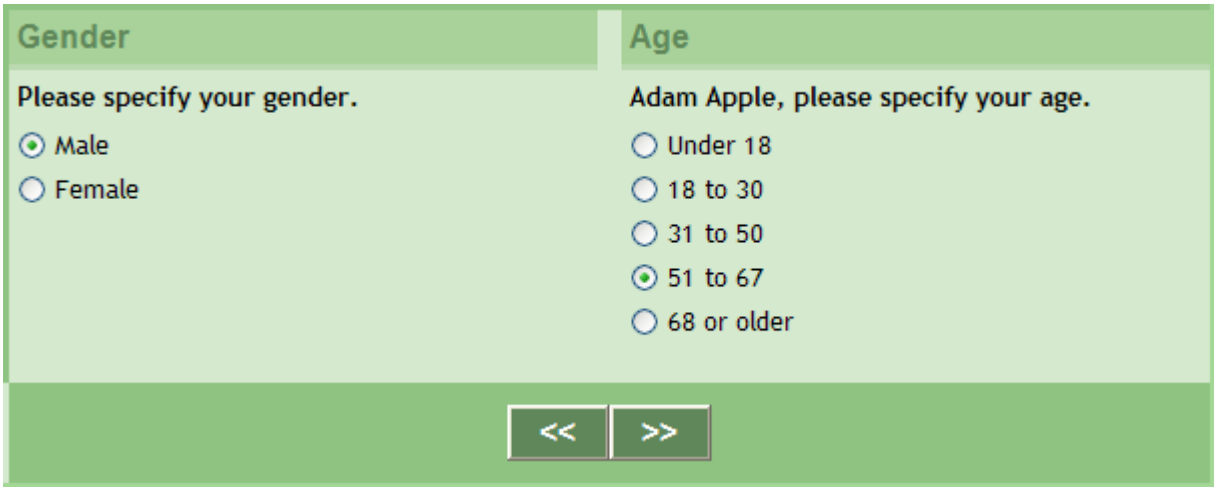


Figure 122 Gender and Age for Non-Europeans

While respondents who select Europe as their region will see the Gender and Age page displayed as below.

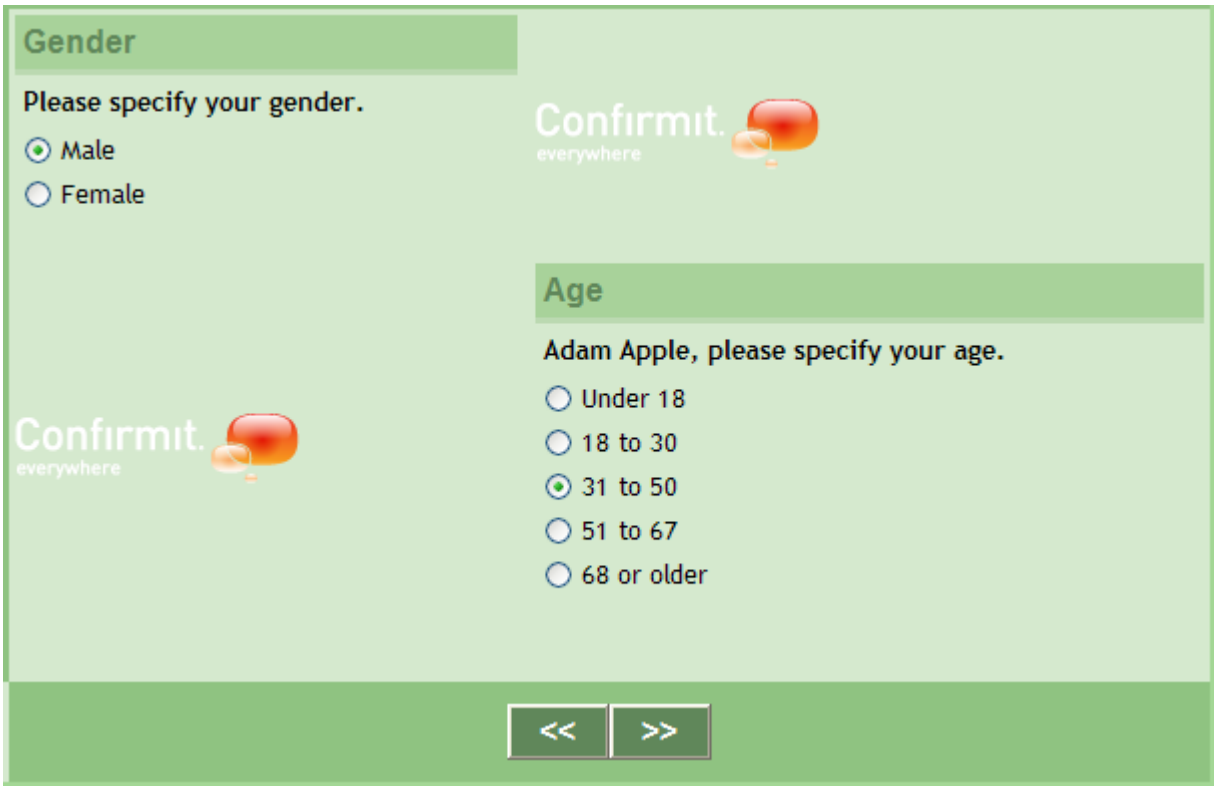


Figure 123 Gender and Age for Europeans

The options and possibilities here are limitless. You can base the layout on the respondents' answers to previous questions, and on their background and panel questions. Using scripting you can for example base the layout on time and date, or on pseudo-random selections.

4.10.8. How to Create an Easy Layout

An "Easy Layout" is a sub-type of survey layout which can be edited visually in Confirmit Express, and which contains some specific html styles and settings. When the Easy Layout box is checked (see below), only survey layouts designated as Easy Layout are displayed in the second step of the wizard. This ensures that the new Easy Layout will have an existing Easy Layout as its template, and will therefore inherit the required styles and settings.

1. In the Survey Layout List toolbar, click **New Survey Layout**.

   The New Survey Layout wizard opens at step 1.

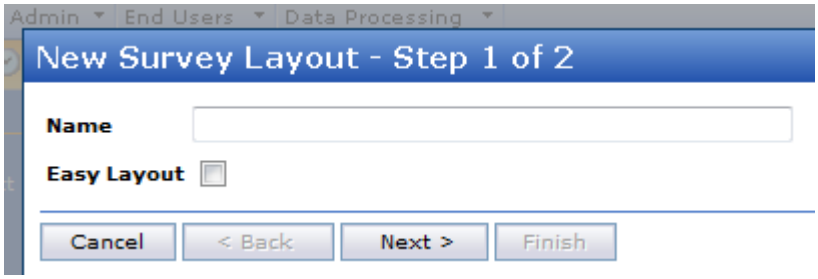


Figure 124 Step 1 of the New Survey Layout wizard

2. Type a name for your new survey layout into the Name field.

3. Check the Easy Layout box.
4. Click **Next**.

   The wizard moves to step 2 of the procedure and a new window opens containing a list of existing Easy Layouts.

5. In the list, select the Easy Layout that you wish to use as the template for your new layout (click on the appropriate radio button).
6. Click **Finish**.

   Your new survey layout is created and added to the Survey Layout List, accessed via the **Quick Access menu > Survey Layouts** command. The Toolbox column opens with the Layout and Styles toolbox, containing the tree for your new Easy Layout.

Note: Easy Layouts can only have one theme - the Main Theme. You cannot change the name of this theme, but you can edit it as necessary.

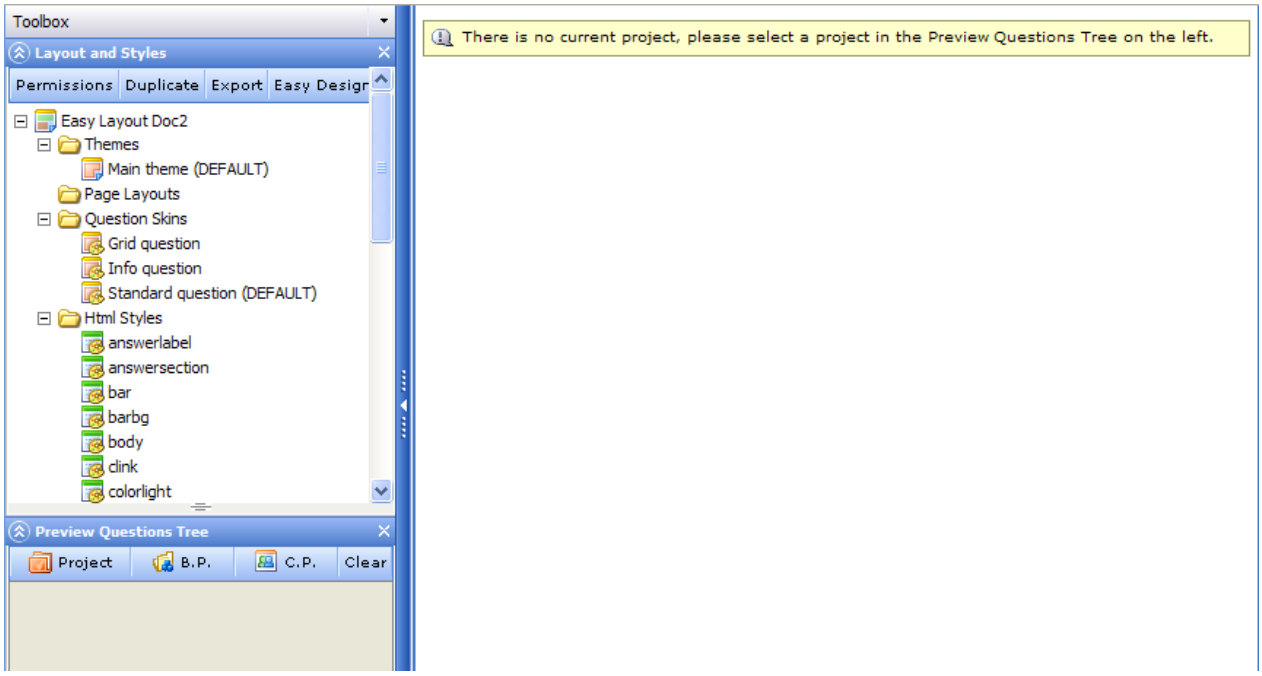


Figure 125 The Survey Layout Editor with the new Easy Layout layout in the toolbox

You can now edit your new Easy Layout and set it up as required (see Editing an Easy Layout on page 122 for more information). Note that for a preview to be displayed, a survey must be selected.

4.10.9. Editing an Easy Layout

The editing functionality available in Easy Layouts is restricted to the basic elements; if you need to perform more advanced editing then you must use the standard Designer editing options. The Easy Layout interface relies on styles having specific names, and you cannot add questions or change the object names. However you can rearrange the elements on the page.

If your survey uses an Easy Layout, then the **Edit Survey Layout** item appears in the **Designer** menu. Click this item to open the Edit Survey Layout page. Any changes made here will then be "Survey specific". Otherwise:

1. In the **Quick Access** menu, go to **Survey Layouts**.
2. Find the layout you wish to work with, and open it by clicking on its blue layout name text.

   The Survey Layout Editor page opens with the layout tree open in the Layout and Styles toolbox.

Note: Before you can edit an Easy Layout, it must be associated with a survey so that the preview can be displayed. The survey is not "saved" with the Easy Layout; the association is only temporary and exists only while the Easy Layout is open. You must therefore select a survey every time you open an Easy Layout for editing.

3. In the Preview Questions Tree toolbox, click the **Survey** button.

   The Survey List window opens, listing all the surveys to which you have access.

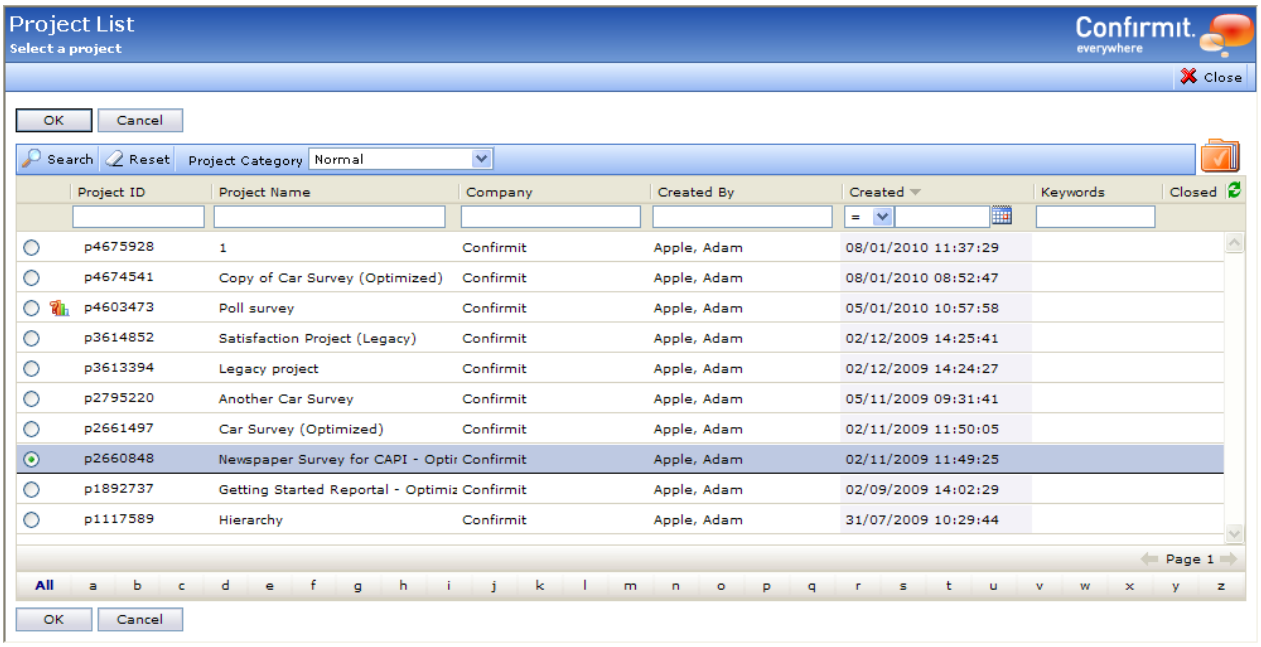


Figure 126 Example of the Survey List window

4. Select the survey to which you wish to associate the Easy Layout, then click **OK**.

   Note that you should select a survey that includes all the components that you wish to set up in the Easy Layout, such that you will be able to view the components in the preview as you are editing their properties.

   The selected survey is added to the Preview Questions tree.

5. In the Layout and Styles toolbox toolbar, click **Easy Designer**.

   The page displays the Easy Layout editing functionality with the selected survey as the preview. You can now set up the Easy layout as required.

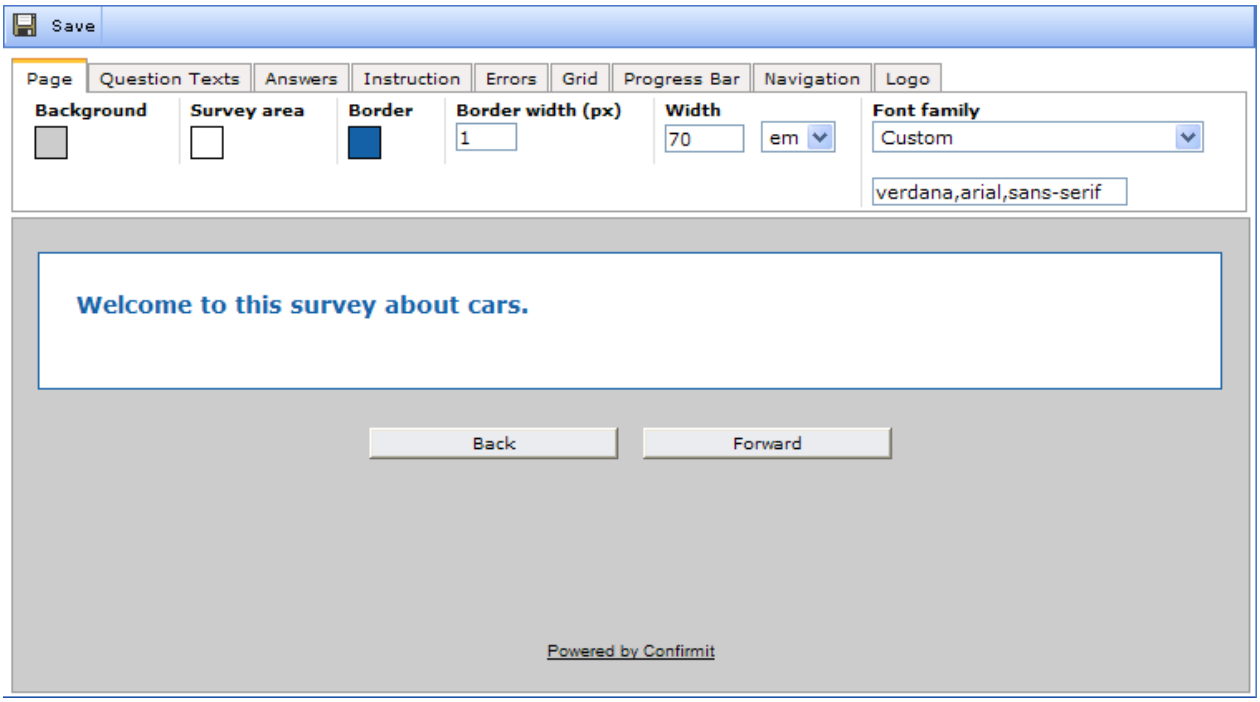


Figure 127 Example of the Easy Layout editing page

The editing page has nine tabs; one for each of the major elements in the Easy Layout. See the following sections for details.

The color selection procedure is the same for all color properties in Easy Layouts. To select a color for an item:

1. Click in the color square for the appropriate item.

   A color selection dialog opens.

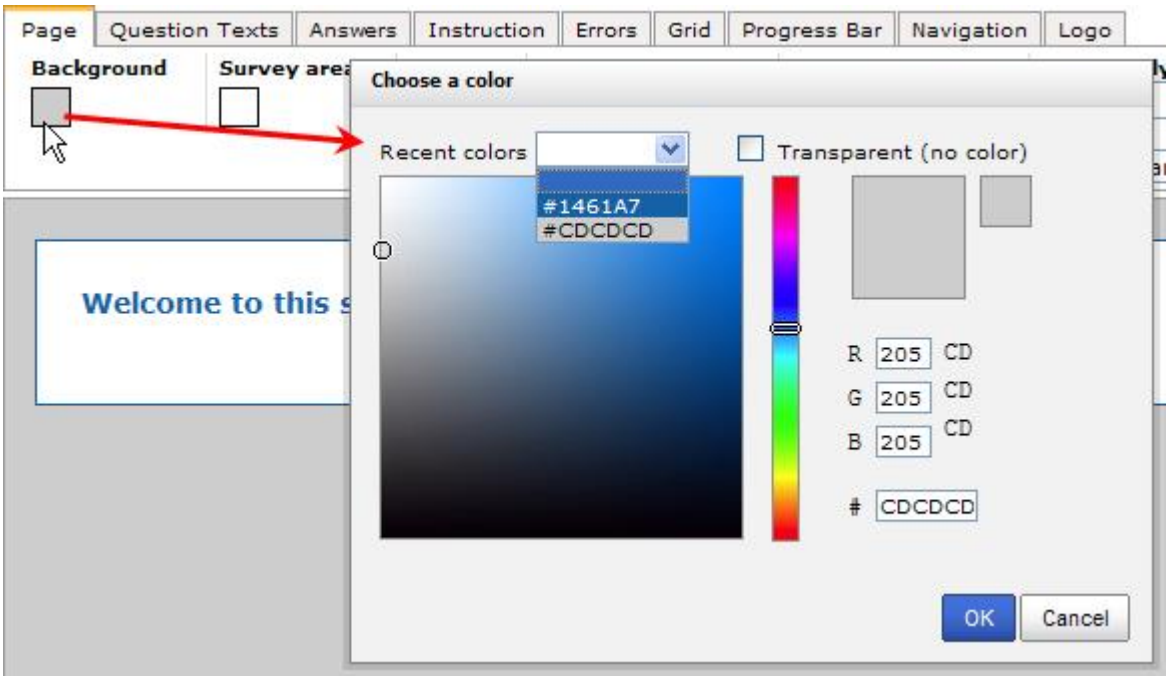


Figure 128 Example of the color selection dialog

2. Use the sliders to find the required color or type a color code into the RGB or # fields.
3. Click **OK** to use that color.

Once a color has been selected and used, it will be listed in the Recent Colors drop-down. This drop-down is available on all the color selectors for the other tabs in Easy Layouts, so you can easily use the same colors in different parts of the page.

When selecting colors, the following points should be considered:

- Strong and bright colors strain the eyes so are difficult to look at.
- About 10% of the male population are red/green color-blind, so you should avoid using combinations of red and green for area fills or emphasis.

4.10.9.1. The Easy Layout Page Tab

The properties on the Page tab control the look of the questionnaire page and the font used for the text on the page. Note that the same font will be used for all the texts on the page, but the style (bold, italics and color) and the font size can be set individually for each text item.

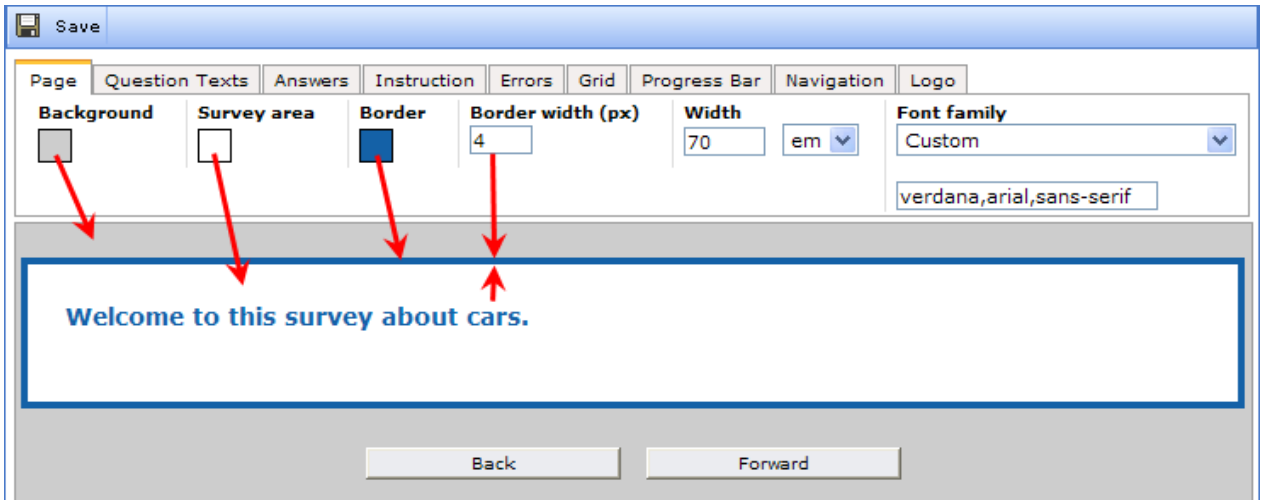


Figure 129 Example of the Page tab

When you have set up the properties on the tab as required, click **Save** to save the changes.

4.10.9.2. The Easy Layout Question Texts Tab

The properties on the Question Texts tab control the color, size and style of the text and color of the background for the questions.

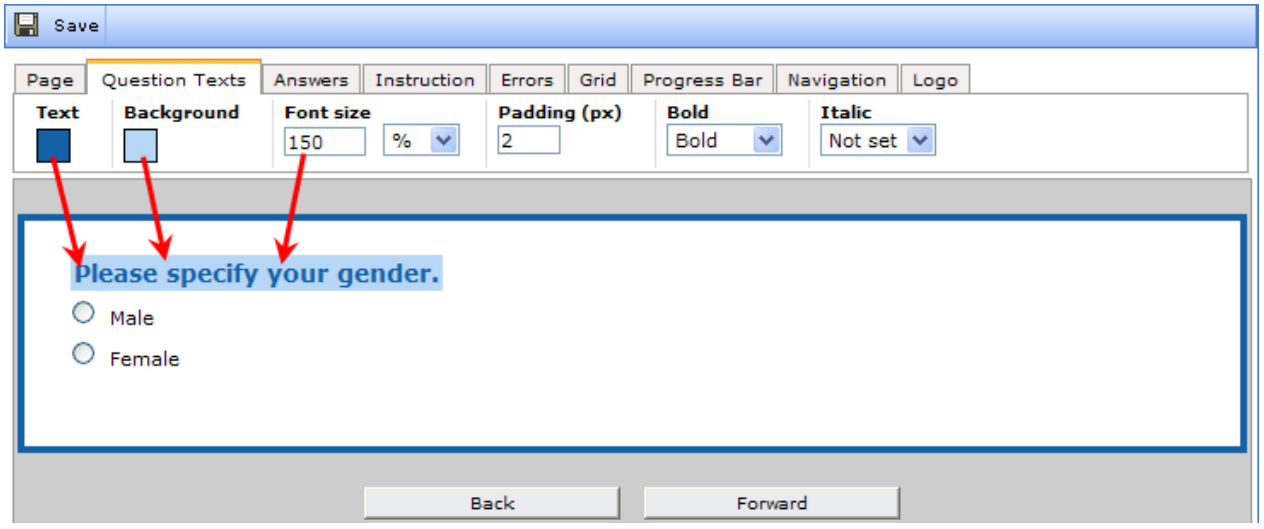


Figure 130 Example of the Questions tab

To select a color, click in the color square for the appropriate item to open the color selection dialog, then use the sliders in the dialog to find the required color or type a color code into the RGB or # fields. Once a color has been selected and used, it will be listed in the Recent Colors drop-down. This drop-down is available on all the color selectors for the remaining tabs, so you can easily use the same colors in different areas of the page.

- **Padding** - specifies the space between the top edge of the question background area and the text, and between the bottom of the text and the lower edge of the question background area.

When you have set up the properties on the tab as required, click **Save** to save the changes.

4.10.9.3. The Easy Layout Answers Tab

The properties on the Answers tab control the color, size and style of the text and color of the background for the answer option texts.

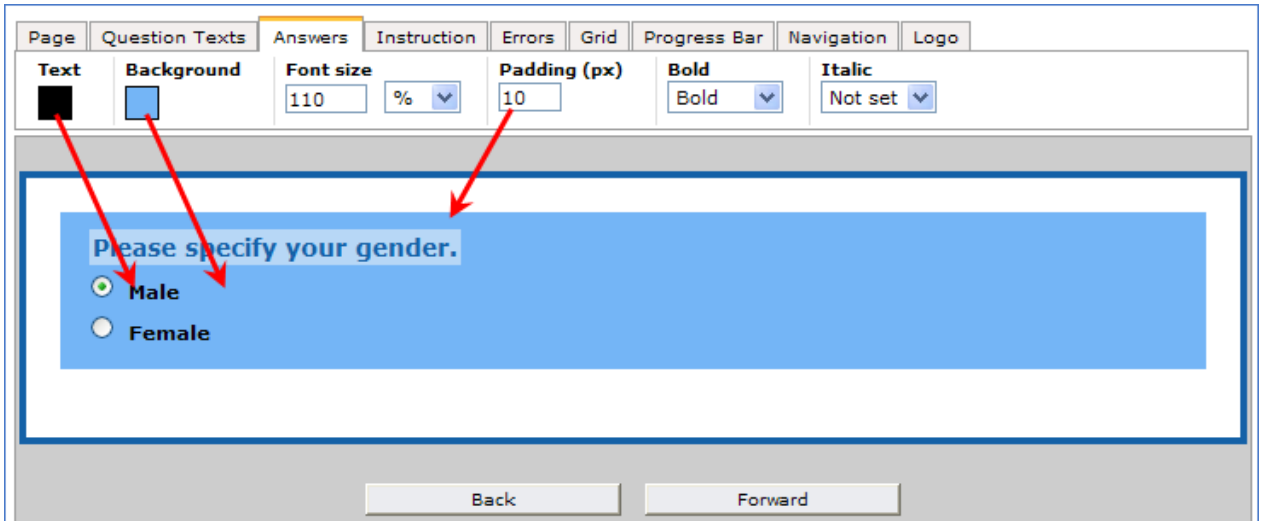


Figure 131 Example of the Answers tab

To select a color, click in the color square for the appropriate item to open the color selection dialog, then use the sliders in the dialog to find the required color or type a color code into the RGB or # fields. Once a color has been selected and used, it will be listed in the Recent Colors drop-down. This drop-down is available on all the color selectors for the remaining tabs, so you can easily use the same colors in different areas of the page.

- **Padding** - specifies the space between the top edge of the answers background area and the top of the question text area, and between the bottom of the answer text and the lower edge of the answers background area.

When you have set up the properties on the tab as required, click **Save** to save the changes.

4.10.9.4. The Easy Layout Instruction Tab

The properties on the Instruction tab control the color, size and style of the text and color of the background for the Instruction texts.

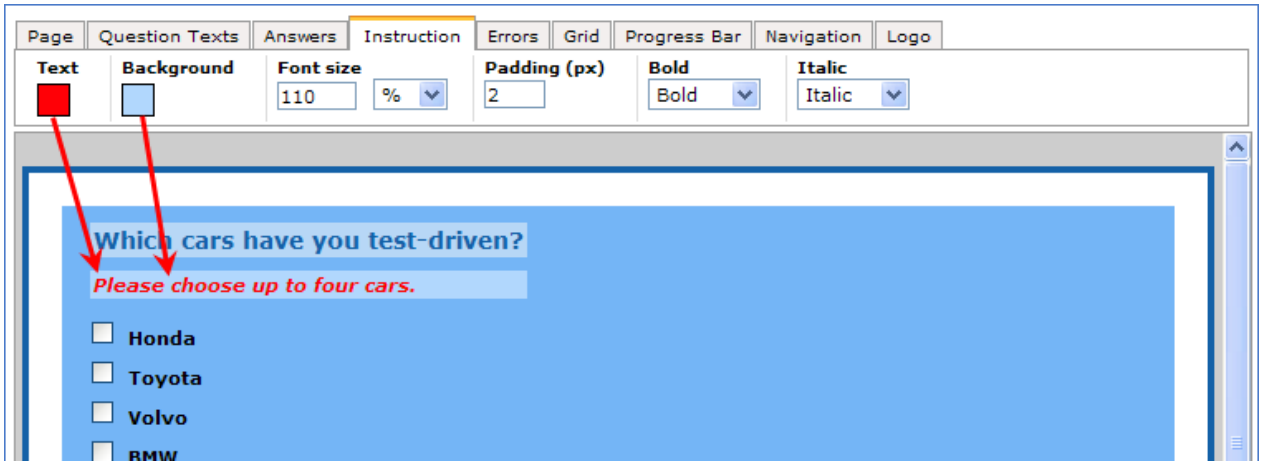


Figure 132 Example of the Instruction tab

To select a color, click in the color square for the appropriate item to open the color selection dialog, then use the sliders in the dialog to find the required color or type a color code into the RGB or # fields. Once a color has been selected and used, it will be listed in the Recent Colors drop-down. This drop-down is available on all the color selectors for the remaining tabs, so you can easily use the same colors in different areas of the page.

When you have set up the properties on the tab as required, click **Save** to save the changes.

4.10.9.5. The Easy Layout Errors Tab

The properties on the Errors tab control the color, size and style of the text, and the color of the background, for the error texts.

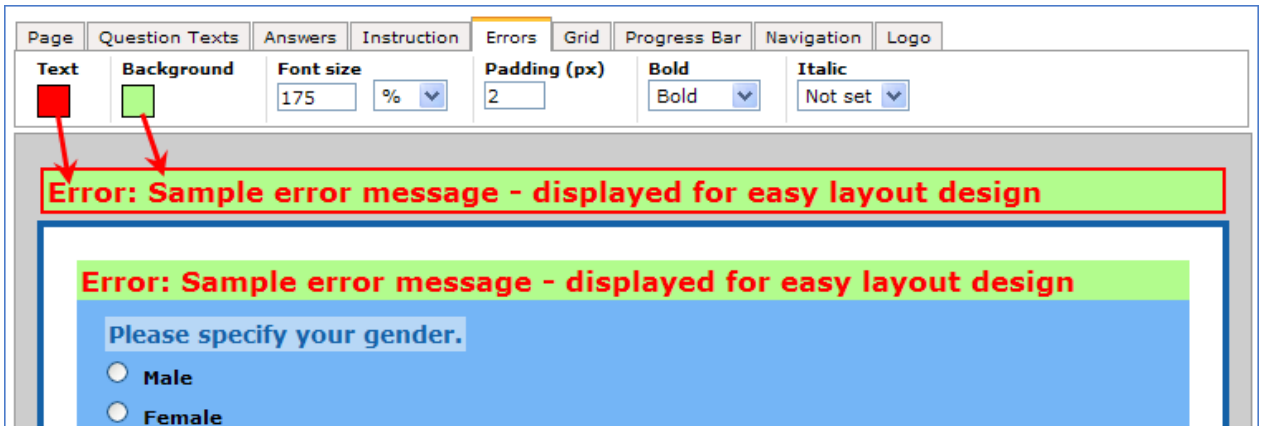


Figure 133 Example of the Errors tab

To select a color, click in the color square for the appropriate item to open the color selection dialog, then use the sliders in the dialog to find the required color or type a color code into the RGB or # fields. Once a color has been selected and used, it will be listed in the Recent Colors drop-down. This drop-down is available on all the color selectors for the remaining tabs, so you can easily use the same colors in different areas of the page.

When you have set up the properties on the tab as required, click **Save** to save the changes.

4.10.9.6. The Easy Layout Grid Tab

The properties on the Grid tab control the color and thickness of the grid border lines, and the width of the scale columns.

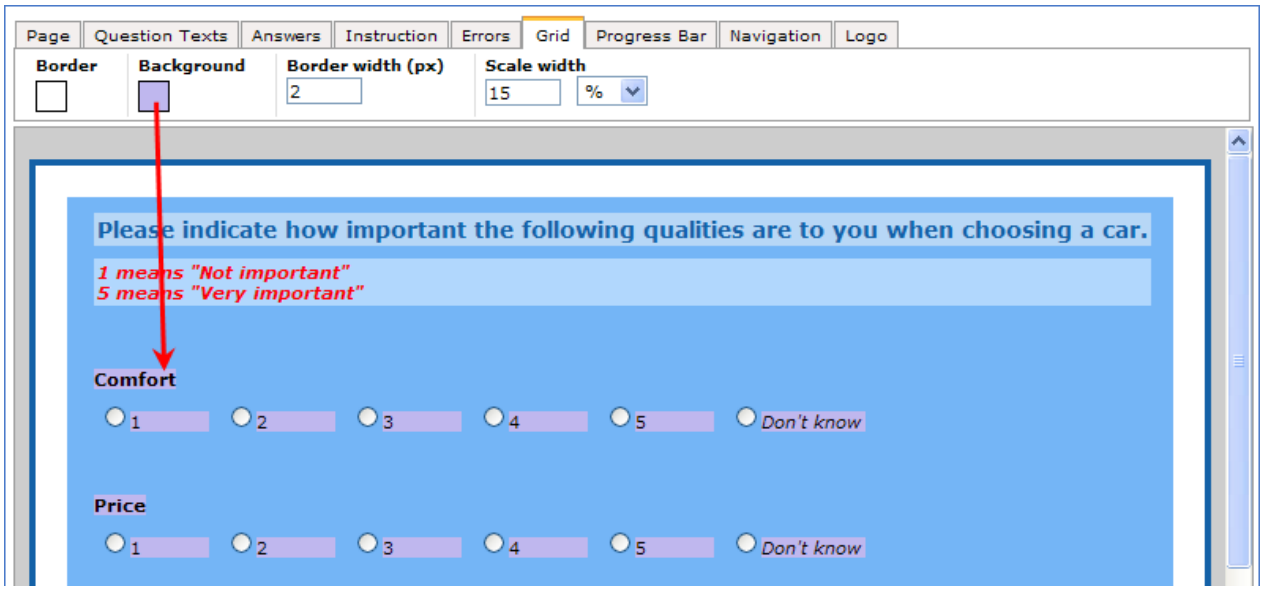


Figure 134 Example of the Grid tab

To select a color, click in the Border Color square to open the color selection dialog, then use the sliders in the dialog to find the required color or type a color code into the RGB or # fields. Once a color has been selected and used, it will be listed in the Recent Colors drop-down. This drop-down is available on all the color selectors for the remaining tabs, so you can easily use the same colors in different areas of the page.

- **Border Width -** specifies the thickness of the scale column border lines, in pixels.
- **Scale Width -** specifies the width of the scale columns, in pixels.

When you have set up the properties on the tab as required, click **Save** to save the changes.

4.10.9.7. The Easy Layout Navigation Tab

The properties on the Navigation tab control the color and font size of the text, and the background color and width, of the navigation buttons .

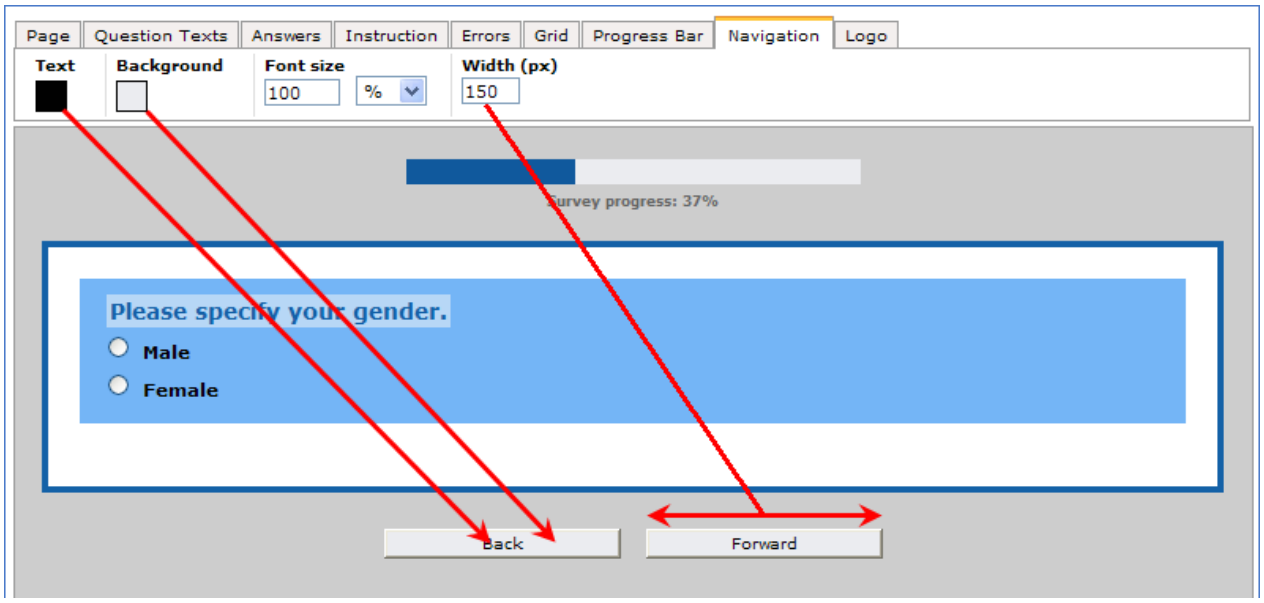


Figure 135 Example of the Layout tab

To select a color, click in the appropriate Color square to open the color selection dialog, then use the sliders in the dialog to find the required color or type a color code into the RGB or # fields. Once a color has been selected and used, it will be listed in the Recent Colors drop-down. This drop-down is available on all the color selectors for the remaining tabs, so you can easily use the same colors in different areas of the page.

- **Text** - sets the color of the text in the navigation buttons.
- **Background** - sets the color of the navigation buttons' background.
- **Font size** - sets the size of the text used in the navigation buttons (note that the buttons height is adjusted automatically to suit the text size).
- **Width** - sets the width of the navigation buttons.

When you have set up the properties on the tab as required, click **Save** to save the changes.

4.10.9.8. The Easy Layout Progress Bar Tab

The properties on the Progress Bar tab control the colors that will be used in the questionnaire progress bar. If the survey you have selected to use for the preview includes a progress bar (see Include Progress Bar on page 520 for more information), then you will be able to view the results.

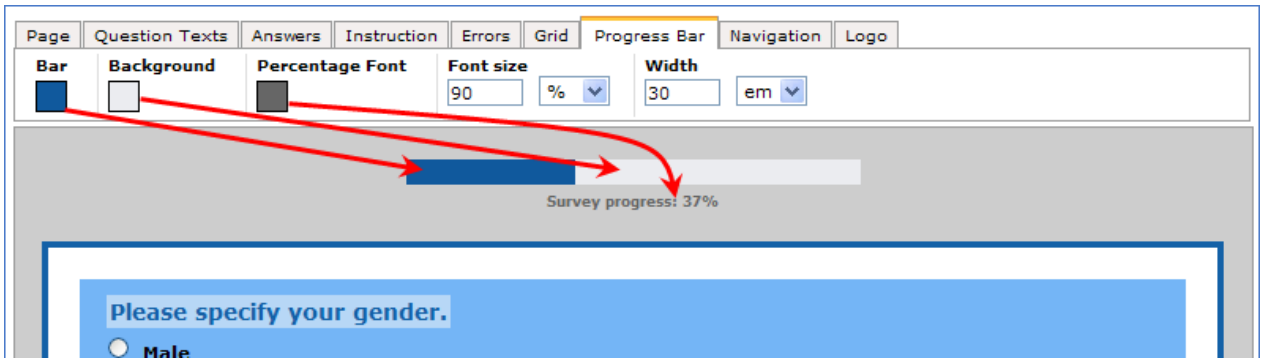


Figure 136 Example of the Progress Bar tab

To select a color, click in the appropriate Color square to open the color selection dialog, then use the sliders in the dialog to find the required color or type a color code into the RGB or # fields. Once a color has been selected and used, it will be listed in the Recent Colors drop-down. This drop-down is available on all the color selectors for the remaining tabs, so you can easily use the same colors in different areas of the page.

When you have set up the properties on the tab as required, click **Save** to save the changes.

4.10.9.9. The Easy Layout Logo Tab

The properties on the Logo tab enable you to specify the URL to the logo you wish to use in surveys using the Easy layout, and also specify where on the page the logo is to appear.

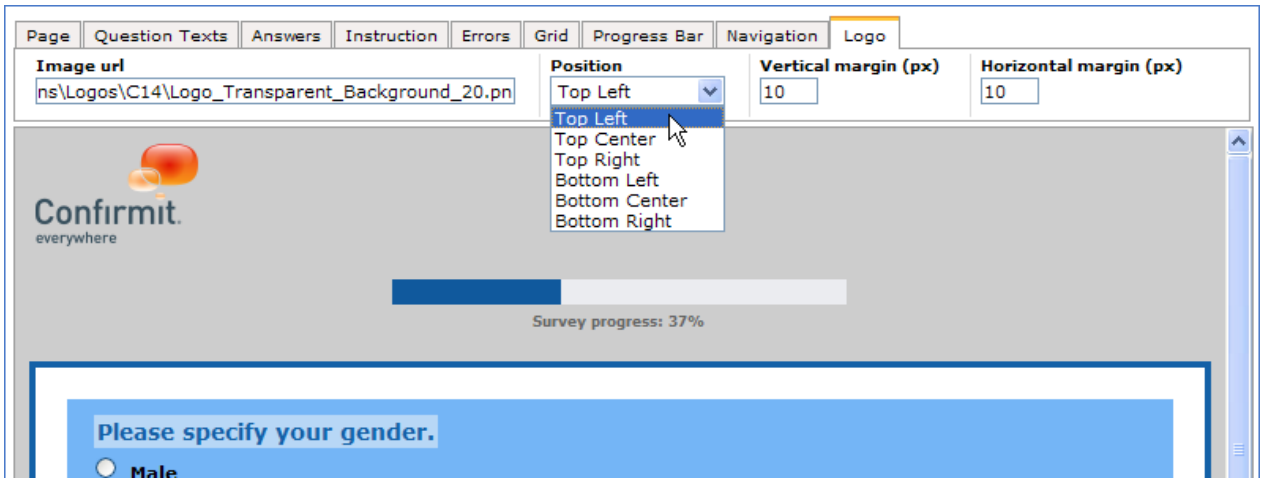


Figure 137 Example of the Logo tab

- Type or copy into the Image URL field the URL to the image file you wish to use as the logo.
- Go to the Position drop-down list to select where on the page you want the logo to appear.
- **Vertical Margin -** sets the vertical distance between the image and the edge of the page.
- **Horizontal Margin -** appears when the Position property is set to one of the "...Left" or "...Right" settings. This specifies the horizontal distance between the logo and the nearest page edge.

When you have set up the properties on the tab as required, click **Save** to save the changes.

4.10.10. Responsive Rendering

The Responsive Rendering functionality allows the survey layout to automatically adapt to suit the device the respondent is using to answer the survey. This allows a unified look-and-feel for a survey irrespective of the device used by the respondent, and ensures a good respondent experience on any device. So if you select to use a Responsive layout then you do not need to select the Smartphones or Generic mobiles survey modes before launching your survey.

Two survey layouts that are set up to use Responsive Rendering, called **Responsive Rendering Layout**and **Public Responsive Whitespace Layout**, are available. Select one of these for new surveys from the Survey Layout drop-down (see Creating a New Survey on page 202 for more information), or for existing surveys in the Survey Layout to use drop-down on the **Survey Settings > Layouts** tab . For simplicity you are advised to use these layouts and adapt them as necessary to suit your requirements. In the event you wish to create your own layout, to use Responsive Rendering check the Responsive box on the layout's Permissions page (see Global Survey Layout Permissions on page 72 for more information).

A Responsive layout is 'versioned'. That means, when changes are made to the layout, the edited layout is saved as a new version. When you create a survey and select a Responsive layout, the version of the layout that you select is then locked to the survey. This is done so that surveys using an older version of the layout will not be broken by later changes.

The Responsive Rendering functionality adds a number of features to the layout:

- If a respondent makes an error while answering; for example he/she forgets to provide an answer to a required question and attempts to move on to the next question, then an error message is displayed. In addition, both the question involved and the actual error are highlighted. As the respondent corrects an error, the highlighting for that error is switched off. When there are no more errors to correct, the respondent can move on to the next question. The error message that is displayed can be customized.
- When a grid is rendered on a smartphone, the row text is placed above the scale to ensure the scale has as much space as possible. Any hint texts are also placed above the scale, and as the respondent scrolls down through the answer rows the hint texts will remain visible at the top of the display. When the respondent scrolls further and moves to the next question, the hint texts move up off the screen. Any non-scored answer options, such as "Not applicable", are placed below the scale.

Note: Not all question types and features are supported by the Responsive layout functionality. The "Responsive Rendering Supported Features" document containing a list of the questions and features that are currently supported, can be downloaded from the Confirmit Extranet. You will need to log in to the extranet to access this document.

If you have selected a Responsive layout for your survey and you try to include a feature that is not supported, then when you attempt to launch the survey the task will fail. The 'problems' will be listed in the error list and you will have to either remove the problem feature(s) from the survey or select a different survey layout. The task will also fail if you attempt to use a Responsive layout when the functionality is not switched on for your company. In this case the message "You cannot use this layout" will be presented.

4.10.10.1. Editing a Responsive Layout

You edit a responsive layout in the same way as a "normal" layout - to make changes just for the current survey, edit the layout in the survey, to make changes to the for (see Working with Survey Layouts on page 75 for more information). However some of the styles that are most commonly edited are gathered and presented on the Style Bundle tab in the Theme editing page.

The image below shows the tab as it is set up for Confirmit's Responsive Rendering Layout.

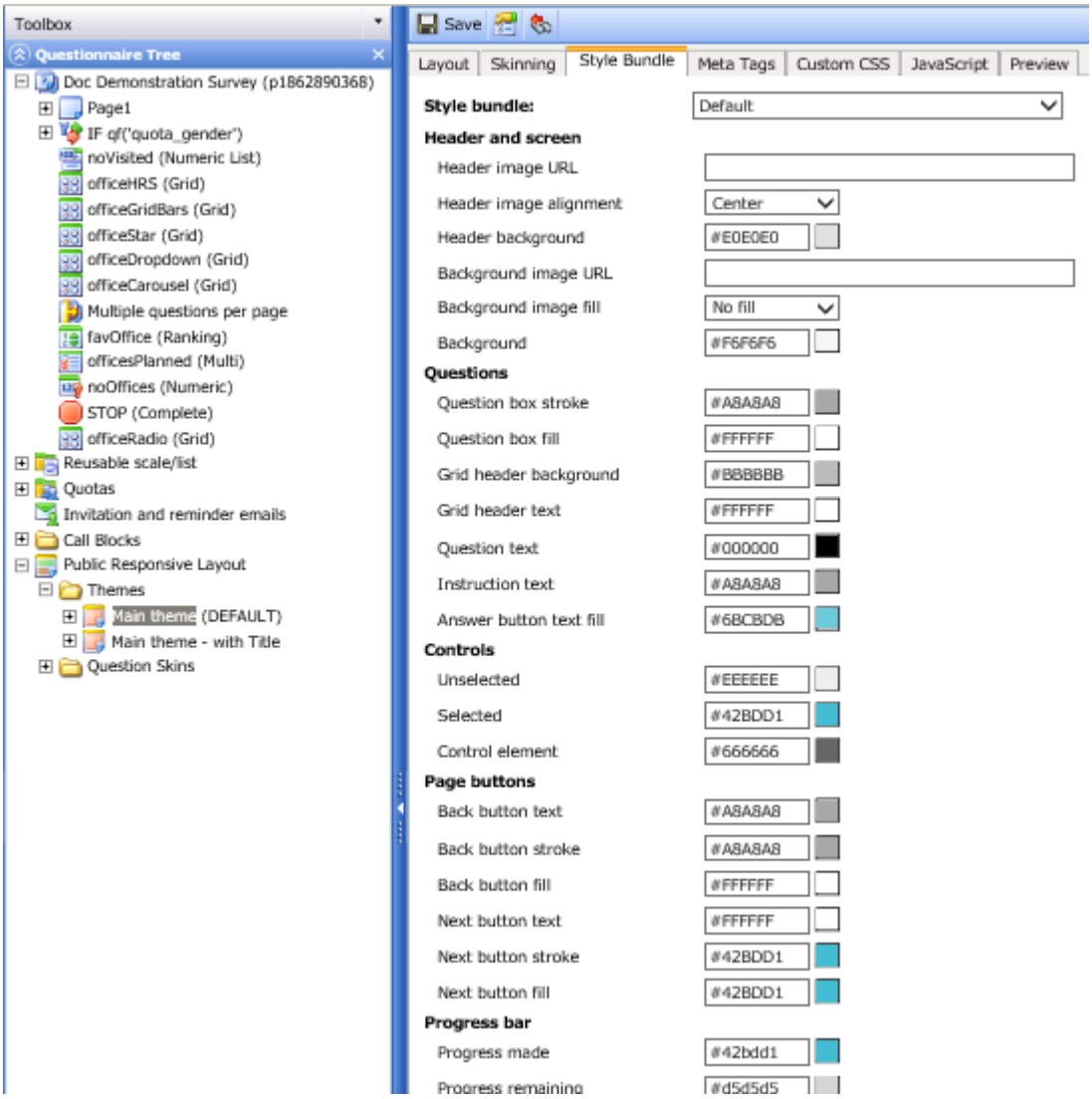


Figure 138 The Style Bundle tab for Confirmit's Responsive Rendering layout

Here you can set the colors to be used for the various question types that are supported by the Responsive Rendering functionality.

4.11. Import Survey Definition

Note: Standard users cannot import survey definitions.

Questionnaires can be exported and imported through XML. The feature allows users to transfer questionnaire definitions, report definitions and individual report definitions from one Confirmit server to another (see Export Survey Definition on page 194 for more information).

You can take advantage of Confirmit's XML Web Services directly from the output of the Survey XML Export. This makes integration of questionnaires with other systems much easier for customers developing solutions, since the Survey XML Export supports the Horizons Authoring XML Web Services' object structure.

To import a survey definition from your computer:

1. In the **Home** menu bar, click **Import Survey Definition**.

   The Import Survey Definition overlay opens.

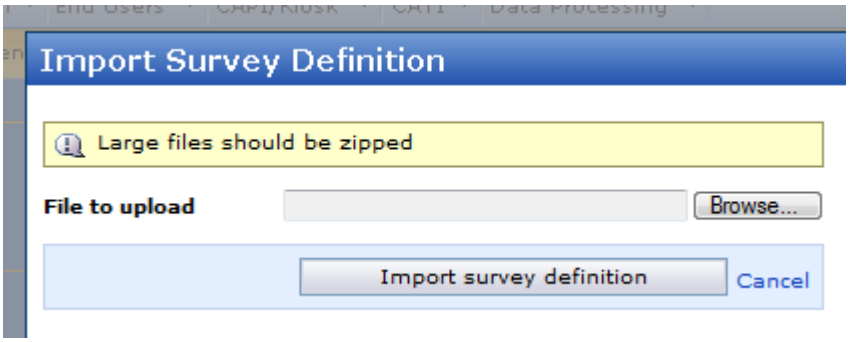


Figure 139 The Import Properties dialog box

2. Click **Browse** to open a standard Windows file selection dialog, then browse to and select the local XML file or a zipped XML file (.zip) on your computer.
3. Click **Import Survey Definition**.

   An import task is initiated.
4. On completion click **OK** to close the overlay and return to the Home page.

   The newly imported questionnaire will appear as a new survey in your survey list (you may need to click the **Refresh** button to update your list).

Note: The import/export only concerns questionnaire and report definitions, not response data.

Refer to the Data Transfer section for more information on the import or export of response data.

4.12. User Settings

Each user has a profile set up at login. The profile holds information about the user's name, email address, preferred language, and screen resolution.

You can change your user settings at any time. To do this, go to the **Home > User > Settings** menu command, or click the **User** link in the upper-right corner of the Authoring window. The User Settings window opens.

Note: Some settings are not available to Standard users.

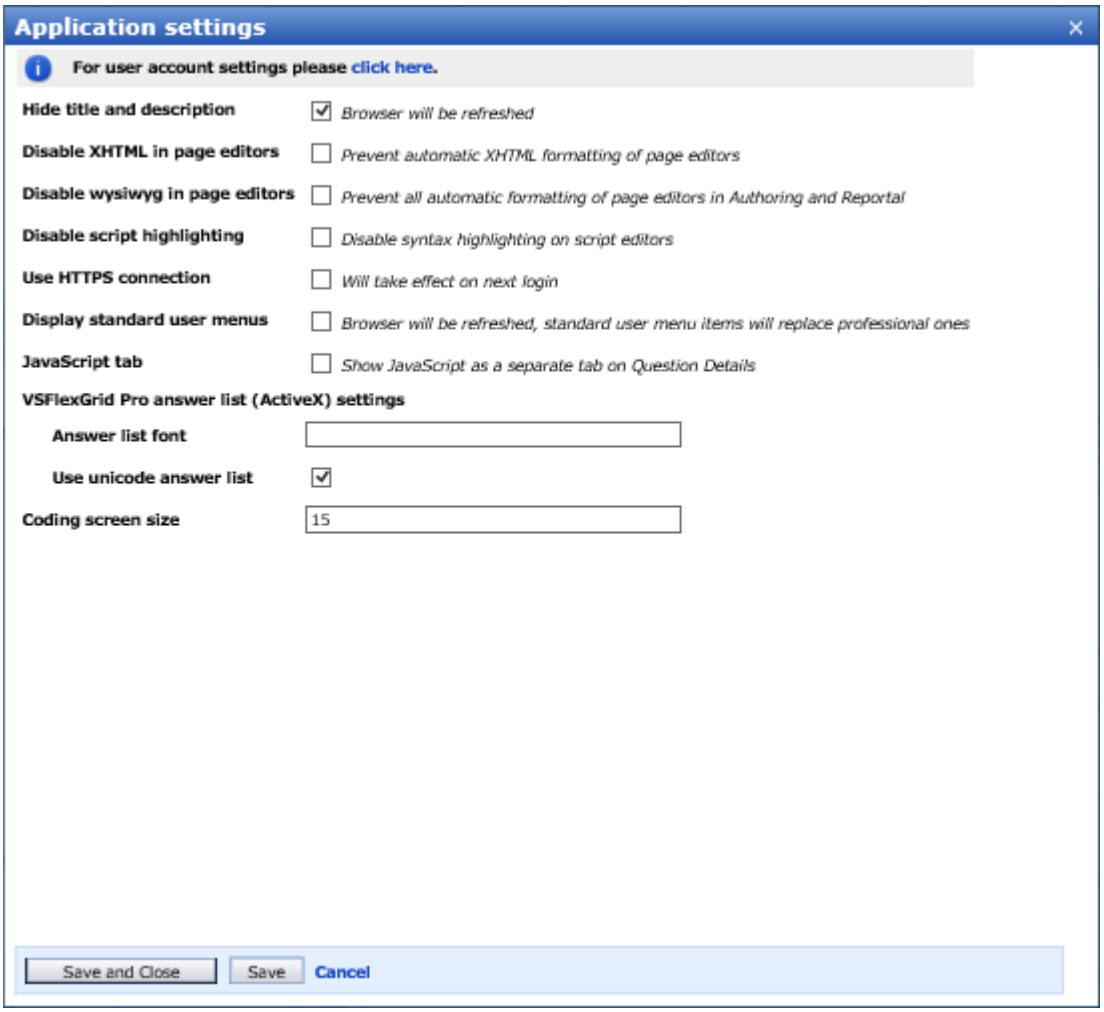


Figure 140 Example of the User Settings window

The properties and fields are as follows:

- **Hide Title and Description –** when enabled, this setting will remove the header on top of the authoring interface containing titles and descriptions of the page you have open. This will allow more space on the page when working in the authoring environment.
- **Disable XHTML in page editors -** this prevents the automatic XHTML formatting of page editors.
- **Disable WYSIWYG in page editors** - check to disable all automatic formatting of the editors (including XHTML editing). Components can still be inserted by dragging them from the toolbox or right-clicking in the editor.
- **Disable script highlighting -** a syntax highlighter is enabled by default in all areas where scripts can be written. This includes Authoring script nodes, masking and validation scripting. If the BETA CodeCompletion component is not enabled, this syntax highlighting will be used. Check “Disable script highlighting” to disable the syntax highlighting.
- **Use HTTPS connection –** users can select whether or not Authoring is to run on an HTTPS connection. Select or de-select this property as required, log off Confirmit and then log in again to effect the change. Note that this property can also be set at site and/or company level, the priority being Site, Company, User. Any level can select to use HTTPS, but if a higher level is set to use it then it will be mandatory for all lower levels.
- **Display standard user menus -** when the user has permissions for both Survey Designer and Standard user, check/uncheck this box to toggle between the two menu sets.

- **JavaScript tab -** check to show the JavaScript tab in the Question Details page for relevant question types (see JavaScript on page 249 for more information).
- **Answer list font –** if required, specify the font to be used for the entries in the Answers list. This field will usually remain empty, however in cases where for example Chinese is to be used, you must specify a font that supports the Chinese character set, for example SimSun, PmingLiu or Arial Unicode MS. A font must be specified here when “Use Unicode Answerlist” is selected, or when the default font does not support the language used when you edit the answers in the ActiveX answerlist (FlexiGrid) editing mode.
- **Use Unicode answer list –** active by default. When editing answer lists and scales in Survey Designer, you can choose between an HTML list and using a plug-in called FlexiGrid, which gives an Excel-like interface. There are two versions of this component: One which supports Unicode and can be used with Windows XP, Windows 2000 and Windows NT, and one that does not support Unicode and can be used with Windows 95, 98 and ME. You can select which version to use in your User Settings.
- **Coding Screen Size –** specify the number of answers that will be shown on the Coding Window screen. This number will also be specified on the back and forward buttons, for example **Prev 10** or **Next 10** (see The Online Coding Tool on page 658 for more information).

4.12.1. User Account Settings

To view or edit your user account settings, click the link in the Application Settings overlay. A new browser tab opens with the settings information.

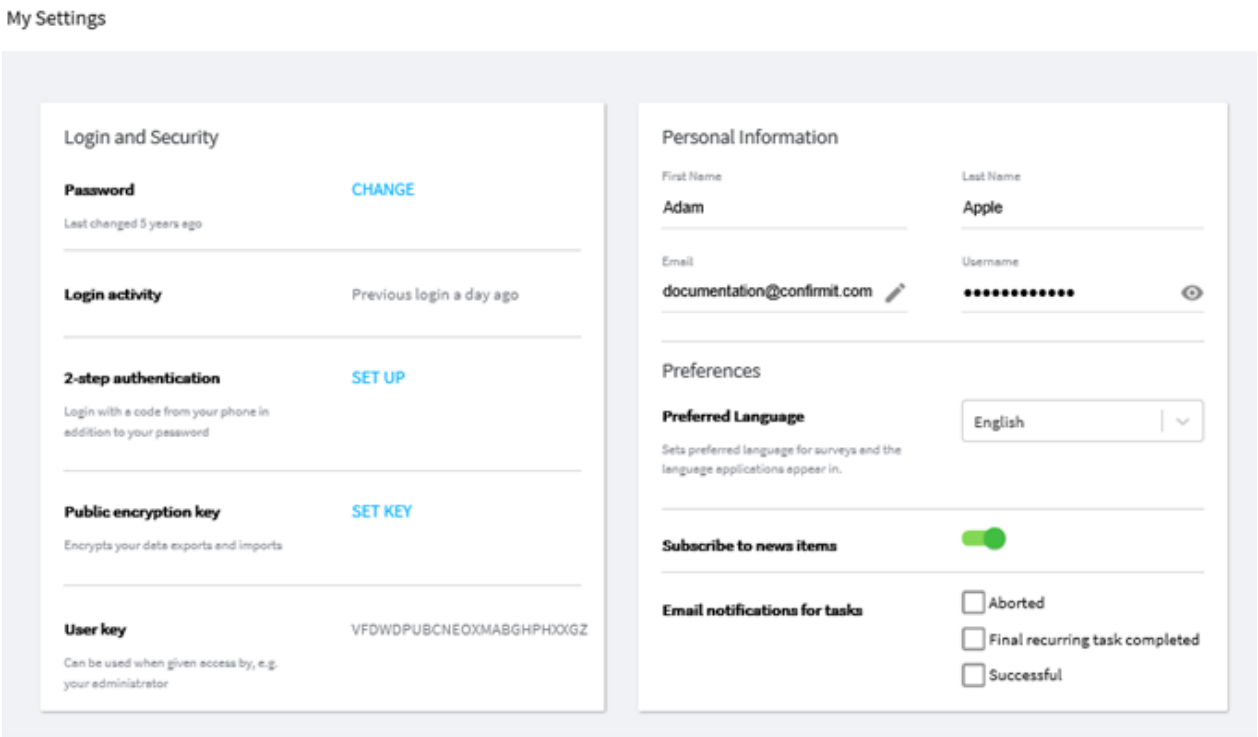


Figure 141 The User Account Settings page

- **Change password –** click the link to open the Change Password dialog (see Password Policy on page 5 for more information).
- **Login activity -** shows when the current user was last logged in.
- **2-step authentication -** an optional additional security measure that requires an authenticator app in addition to your username and password when you log into your Confirmit account (see Using 2-Step Verification on page 137 for more information).

- **Recovery Codes -** This section will automatically appear when 2-step authentication is active. In the event your 2-step authentication code generator app is unavailable, for example you forgot your phone, it's been stolen or you need to reinstall the app, then this property provides 10 randomly generated one-time codes which you can use to access your account. While you have access to Horizons you should make a note of these codes and store them in a safe location; they will then be available if required. There will be no indication of which codes are "spent" and which aren't, but you can regenerate a new set of codes at any time (all old codes including unused codes will then be invalid).
- **Public encryption key -** set public key (see Data Transfer Encryption and FTP on page 6 for more information).
- **User key –** unique to each user. To make yourself “visible” to Confirmit users outside your organization, you will have to supply them with your user key. This is a security issue.
- **First name /Last name –** the name of the user. This is the name that is presented in surveys, reports etc. and is used for interaction with other users. This can be any name.
- **Email –** the user’s email address. This address is used by the Confirmit message system to send messages to the Confirmit users. This is also the default email address where requested report and export files are sent. To assist with system security, if this email address is changed then a notification email is sent to the old address. This field can be left empty.
- **Preferred Language –** the user’s preferred language. This is the language that will be used when previewing questions and reports. This is important to note when working with multilingual surveys.
- **Subscribe to news items -** when checked, the user will receive news items as emails.
- **Email notifications for tasks -** you will be sent notification emails when specific events occur:
    - **Aborted –** you are sent a notification email when a task is aborted (export, import, etc.).
    - **Final recurring task completed -** you are sent a notification email when a recurring task has run for the last time.
    - **Successful –** [not Standard user] you are sent a notification email on the successful completion of each task.

4.12.2. Using 2-Step Verification

When 2-step verification is enabled for your Confirmit account, when you log in to Confirmit you will need your password and a code that is generated by an authenticator app.

So set up the authenticator app:

1. Download the authenticator app that you wish to use onto your mobile device.
2. In Confirmit, open your User Settings overlay (click your user name in the upper-right corner of the Confirmit window) then click the **For user account settings...** link towards the top of the overlay.

A new browser tab opens with the

1. Towards the top of the overlay, click **Enable** beside the 2-step verification option.

   A QR code is generated.

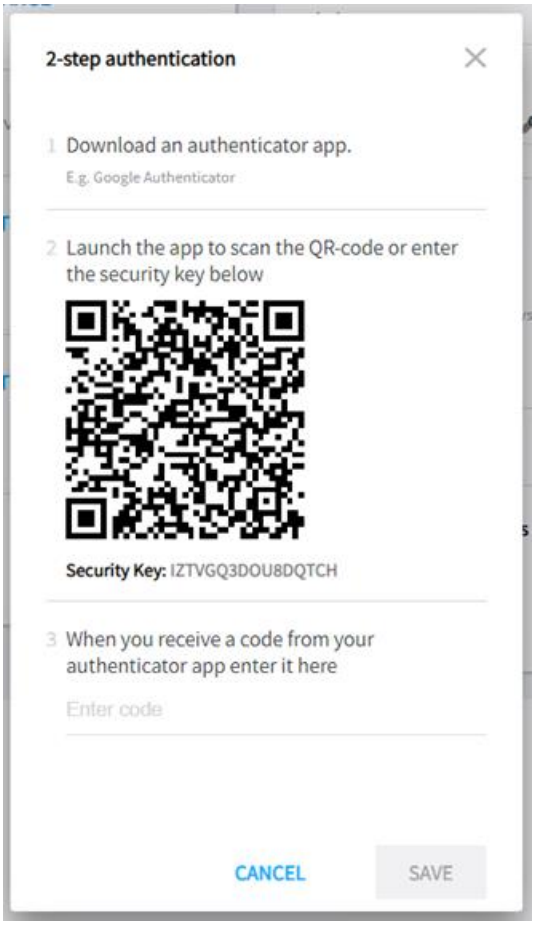


Figure 142 Example of a QR code generated by Confirmit

2. Using your mobile device, scan the QR code.

   A code number is generated and presented on your mobile device.

3. Enter the number into the field towards the bottom of the Confirmit User Settings page and click **Apply**.

   The QR code will close and you will return to the "normal" User Settings overlay. 2-step verification is now activated.

   With the current settings you will need to generate and input a new 6-digit code every time you log in to Confirmit Horizons. You can however set the browser to be "trusted"; this you can do the next time you log in. The computer and browser you use to log in to Confirmit Horizons will then allow you access for 30 days without having to input the 6-digit code. After 30 days you will need to generate and input a new code. Note that if you log in to Confirmit Horizons from any other computer or using a different browser then you will need to input a code again.

To disable 2-step verification, in the User Settings page click **Disable** beside the 2-step verification option then confirm. Note that if you for example lose your mobile device, your system administrator can access your user settings and disable this functionality for you.

Logging in to Confirmit using 2-step authentication:

When 2-step authentication is enabled, when you log in to Confirmit Horizons, after entering your username and password you will be asked for a code.

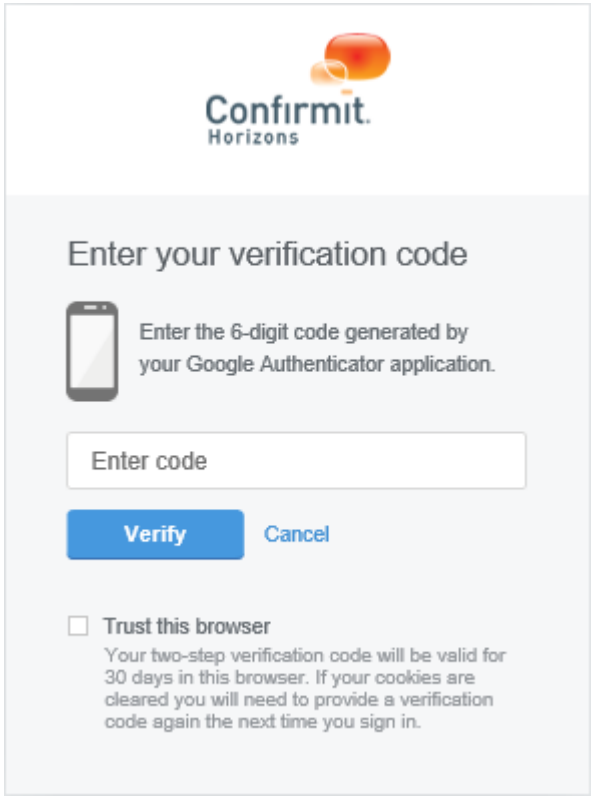


Figure 143 Logging in using 2-step authentication

1. Using your mobile device, generate the required code and enter the code into the field.
2. If you wish to "Trust this browser", check the box (see above).
3. Click **Verify**.

   Confirmit Horizons opens.

4.13. The Company Submenu

A user with the Company Administrator permission will have access to the **Company** submenu in the **Home** menu. Note that this submenu is not available through the Quick Access pane. The **Company** submenu contains logs and settings that may be useful to the company administrator, whilst not providing access to the main system setup menus.

Note: Settings and changes made to the items in this submenu will apply to all the surveys administered by the company.

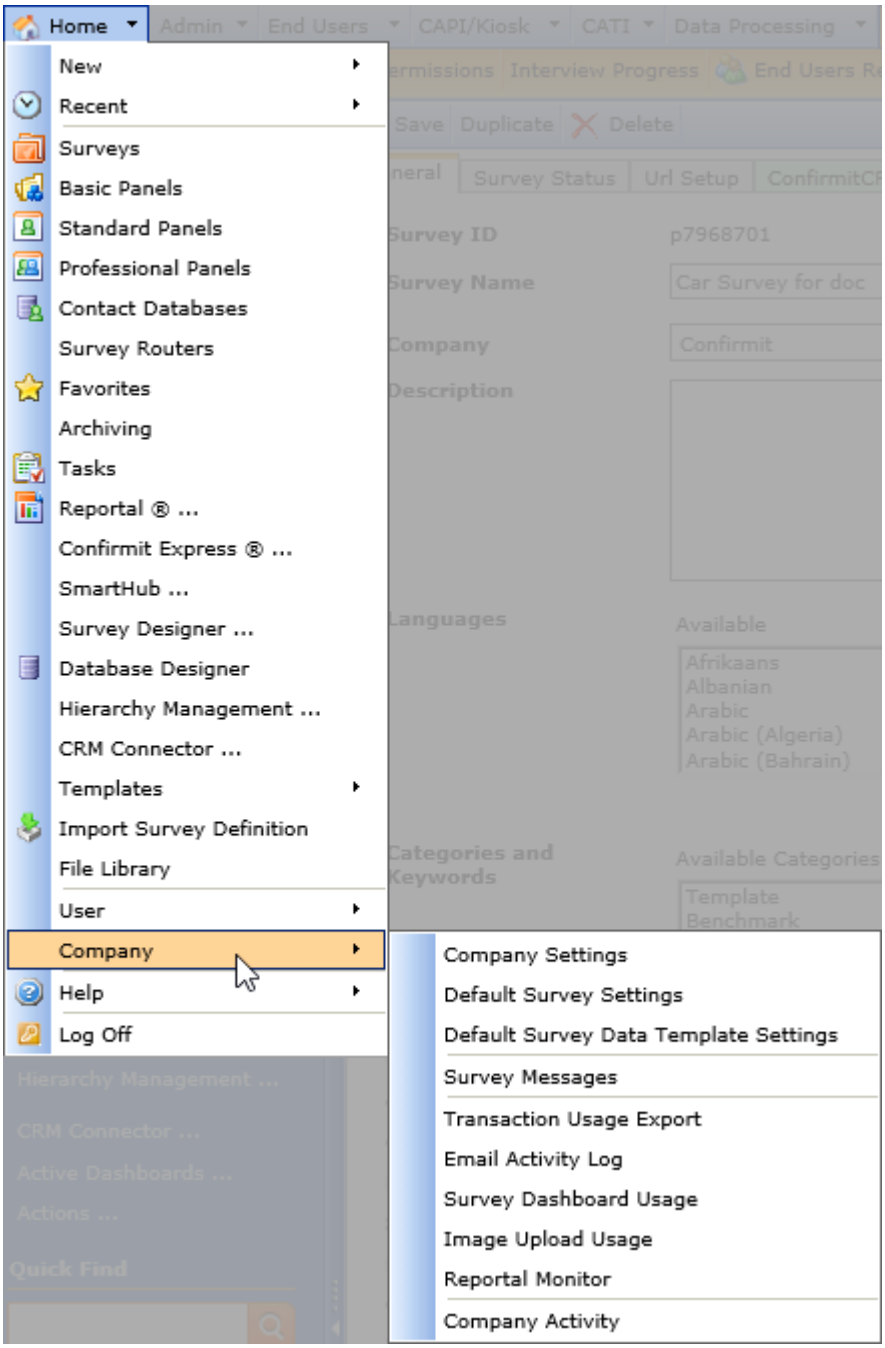


Figure 144 The Home > Company submenu

The items available in the Company submenu are as follows:

- **Company Settings -** Company administrators can now change some settings for their own companies, such as Google Analytics account id,, set up security settings, change branding settings for Reportal etc.
- **Default Survey Settings -** default survey settings templates can be created for the site, company level, or for individual users. Then for example, if the same settings are used for all surveys created by your company, users will not have to go in and set them up for every survey (see How to Create Default Survey Settings Templates on page 524 for more information). Once your company has one or more default settings templates available, the **Use system default survey settings** button becomes available to the users.

- **Default Survey Data Template Settings** - allows you to specify the default settings for new survey data templates (see The Survey Data Template Editor on page 796 for more information). Refer also to the separate Data Processing User Guide for further details.
- **Survey Messages -** Confirmit contains a large number of texts and messages of different types. These texts and messages are already translated into a number of "standard" languages (see Standard Languages on page 193 for more information), and you can specify that any of these languages are to be used by a survey. However you may wish to have the messages displayed in a language that Confirmit does not provide as standard, or perhaps you wish to change some of the texts and messages to suit a particular survey or dialect. The Company Administrator can edit the messages for the entire company here (see Survey Messages on page 190 for more information).
- **Transaction Usage Export -** enables the administrator to export a log of the transactions performed by the company (see Company > Transaction Usage Export on page 151 for more information).
- **Email Activity Log -** Company Administrators and System Administrators have access to the **Email Activity Log**. This report shows the number of emails sent for the current company per month (see Company > Email Activity Log on page 153 for more information). The report can be grouped by date, weekday, week, quarter or all.
- **Survey Dashboard Usage** - provides a report with an overview of the Survey Dashboard licenses used per company and project. A filter is first displayed to allow you to search for particular surveys, users etc.
- **Image Upload Usage** - Respondents can upload an image as the answer to a question. This item provides a log of the image upload traffic (see The Image Upload Object on page 232 for more information).
- **Reportal Monitor -** provides a report with an overview of Reportal report usage.
- **Company Activity -** provides a report with an overview of activity withing the Company Administrator's own company.

4.13.1. Company > Company Settings

Company administrators can now change some settings for their own companies, such as Google Analytics account id, enable database encryption etc.

The Company Settings window has five tabs:

- Security
- Survey Channels
- Branding
- Fiscal Calendar
- Other

4.13.1.1. The Security Tab

When you go to the **Home > Company > Company Settings** menu command, the Company Settings window opens at the Security tab.

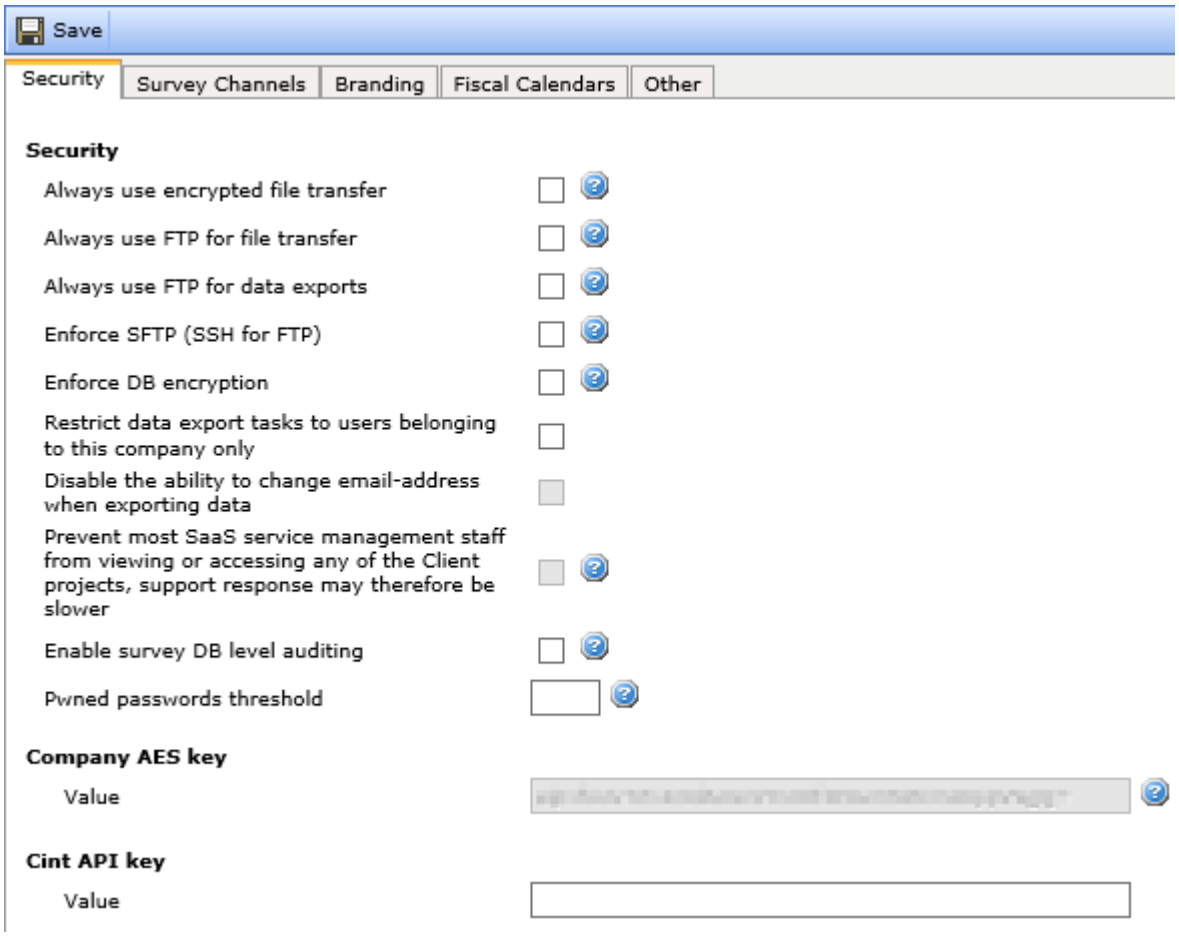


Figure 145 The Company Settings > Security tab

The options are as follows:

- **Always use SSL in surveys** - Check this box to generate all links to limited surveys as secure links, for example https://survey.yourserver.com/wix/pXXXXXX.aspx. The Respondents > Emailing > Secure option will then be chosen by default and locked to prevent changes.
- **Always use SSL in Authoring and Reportal** - Check this option to force all users in this company to use the https:// link for authoring and Reportal access.
- **Always use encrypted file transfer** - Check this box to encrypt all data exports, report exports and respondent exports. The setting forces all exports and imports that support encryption to be encrypted. The system cannot prevent the user uploading plain text data files to the client as the encryption is not checked until the import task is actually run, so unencrypted files can lie on the server. However any import tasks will fail if the data file is not encrypted. Note that when the box is checked, to be able to upload respondents for the users in this company, the respondent list must also be encrypted.

Note: PGP enforcement does not apply to end user downloads - the export data permission allows unencrypted downloads to end users.

- **Always use FTP for file transfer** - Check this option to make FTP the only option available in the “File transfer” field on the set up page for data exports, report exports and respondent export. The Email option will not then be available. Data imports and survey import and export are not affected by this setting and do not have to be to/from an FTP server.

- **Always use FTP for data exports -** check this option to make FTP the only option available in the "File transfer" field on the set up page for data and respondent exports. The Email option will not then be available. Survey import and export are not affected by this setting and do not have to be to/from a FTP server.
- **Enforce SFTP (SSH for FTP) -** Check this option to enforce SSH when using FTP for importing/exporting data.
- **Enforce db encryption** - If the Database Encryption add-on is licensed by your company, then this option will be available. Check this option to enforce encryption for all new databases created for surveys. Note that this is not retro-active and will only apply to new databases. If you want the databases to be encrypted for existing company surveys, the surveys must be re-launched and new databases must be created. Encryption only applies to the production survey database; system databases and multimode databases are not encrypted.
- **Restrict data export tasks...** - If this option is checked, only users registered to the same company as the survey owner will be able to perform exports on this customer's surveys. Even users with system_admin or company_admin permission will not be able to perform exports if they are not registered with the survey owner's company. An account administrator or system administration can edit this setting under the **Admin > Accounts > Companies** menu. Note that any changes to this property are registered in the system activity log.
- **Disable the ability to change email-address when exporting data -** check this option to prevent access to the email address field when exporting data. This is intended to reduce the risk that someone accidentally changes this field and thereby sends confidential information to someone who should not receive it. Note that the Override button is still available, however this must then be used with intent so is a more thought-through process.
- **Prevent most Saas... -** Check this option to prevent users with SYSTEM_PROJECT_ADMINISTRATE from implicitly being granted access to projects (surveys, polls and panels) in this company. Any user can still gain access to the project, but only if they are explicitly granted permission to do so. Users with SYSTEM_ADMINISTRATE can access all projects irrespective of this setting.
- **Enable survey db level auditing -** check this option to enable SQL Server auditing at the survey database level. When enabled, all surveys created for this company will have database auditing enabled. This audit log is not accessible through the Confirmit user interface.
- **Pwned passwords threshold -** specify the maximum number of times a new password can be found in previous data breaches before it will not be accepted. The recommended setting is 0, which means that if the chosen password appears in the list of breached passwords then it will not be accepted. A blank value disables the restriction. The pwned password service of haveibeenpwned.com is queried. Note that to maintain security only the first 5 HEX characters of an SHA-1 hashed password are sent.
- **Company AES key value**- If Single Sign-on or External Respondent Limited Surveys are to be used, an AES key is required. The key assigned can be viewed here. When this value is defined it allows the survey setting to be selected by users; when not defined it is grayed out.
- **Cint API Key -** The Cint API key is required if you wish to allow the survey scripting function to pass transition information over to Cint.

Note: For further details about the security systems that are available, and those that are used in Confirmit, go to https://extranet.confirmit.com/library/security.aspx.

4.13.1.2. The Survey Channels Tab

To access the options on the Survey Channels tab, go to the **Home > Company > Company Settings** menu command and select Survey Channels. The tab opens as shown below .

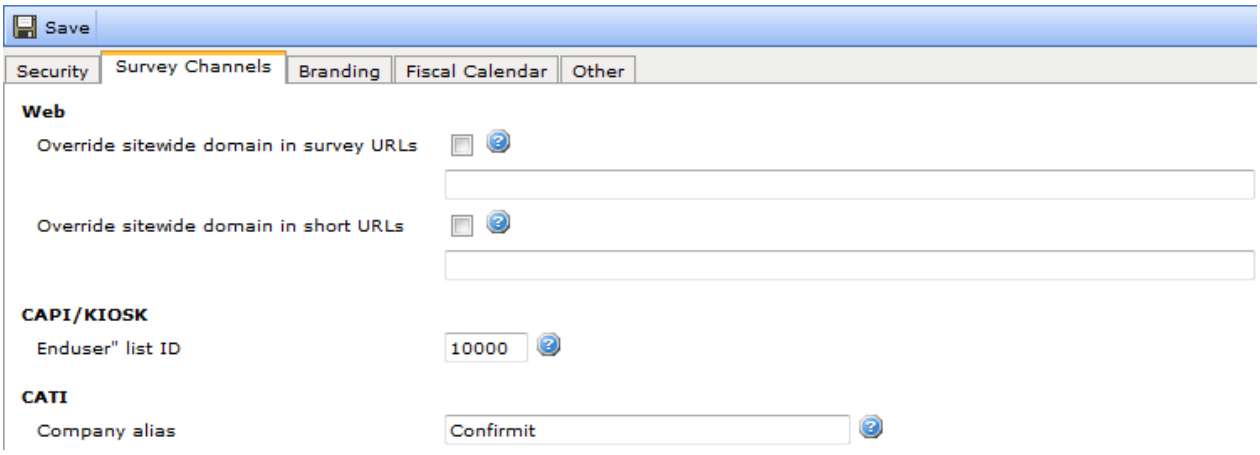


Figure 146 The Company Settings > Survey Channels tab

The options are as follows:

- **Override sitewide domain in survey URLs -** if you are running surveys for customers, the customers may not wish the links to their surveys to include another domain name, for example ....Confirmit.com. Your company may therefore set up a permanent domain override as a company-wide default setting. If you wish to use a domain other than the default in the survey links, select the "Override site-wide domain in survey URLs" checkbox and specify the new domain in the field below. You must first register the domain you wish to use (if not already done) and set up a domain record to point towards the public IP address of the interviewing server(s) in the DNS domain manager (see Using Your Own Domain Name for Confirmit Surveys on page 513 for more information).
- **Override sitewide domain in short URLs -** [The Short URLs functionality is an add-on. Contact Confirmit Support for details]. If you wish to use a domain name other than the default in short URLs for surveys, you may set up a permanent domain override as a company-wide default setting. You must first register the domain you wish to use (if not already done) and set up a domain record to point towards the public IP address of the interviewing server(s) in the DNS domain manager (see Using Your Own Domain Name for Confirmit Surveys on page 513 for more information). Once the domain is set up, select the “Override sitewide domain in short URLs” checkbox and specify the new domain in the field below.

Important:
When typing the domain link into the field for either of the above properties, ensure you do not include a trailing space (a space character at the end of the domain). A trailing space in this link will give an error during launch for all surveys, preventing any surveys from being launched by the company.

- **Enduser List ID -** The CAPI/Kiosk Interviewers must be created in an End User List. The ID of this End User List must be registered in the Enduser list ID field. Only one CAPI/Kiosk Interviewer End User list can be registered. Refer to the CAPI/Kiosk User Guide for further details.
- **Company Alias -** The CATI interviewer must log in using his/her username and password and also a company name as part of the identification. This will be the alias specified for this company, and the field cannot be empty. Refer to the CATI Supervisor’s Manual for further details.

4.13.1.3. The Branding Tab

This tab contains a number of settings and fields that allow you to set your own company branding onto the Reportal login page. All panelists and end users for your company will then see this custom login page.

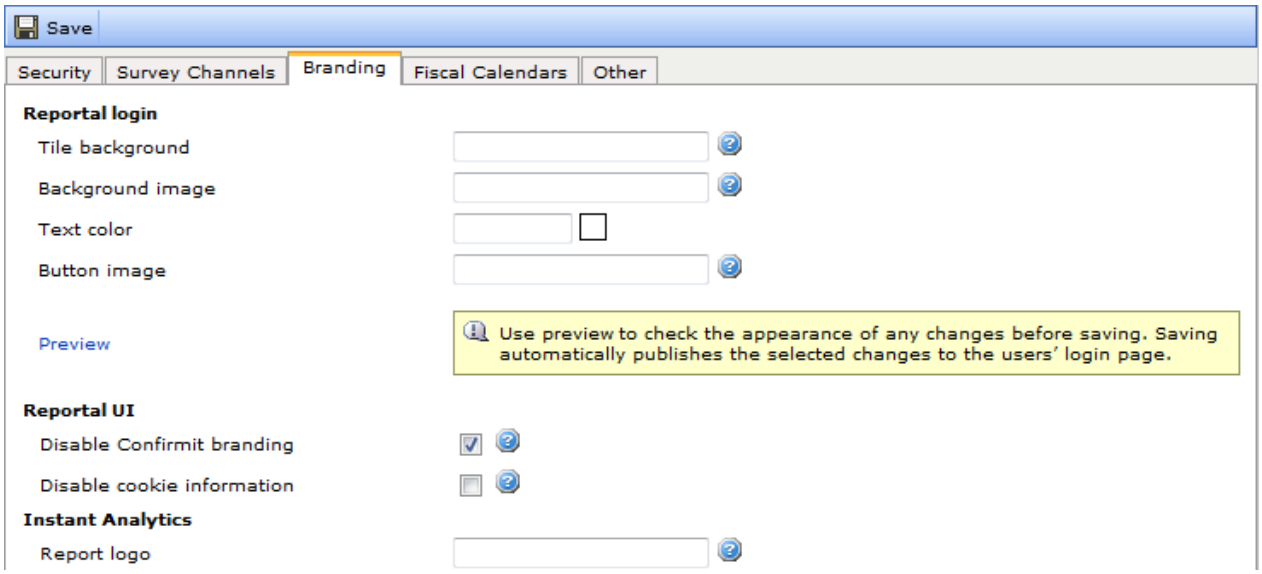


Figure 147 The Company Settings > Branding tab

- **Tile background** - enter the URL path to an image uploaded to the file library. This image will then be used as the tiled background image of the underlying page area. Note that only images hosted in the file library can be used.
- **Background image -** enter the URL path to an image uploaded to the file library. This image will then be used as the background image of the login details area. Note that only images hosted in the file library can be used.
- **Text color -** sets the color of the text used in the login page. Either type the color code number into the field, or double-click on the example square to open a color picker and select the color you wish to use.
- **Button image -** enter the URL path to an image uploaded to the file library. This image will then be used as the **Submit** button image on the login page. Note that only images hosted in the file library can be used.
- **Preview -** enables you to check the page before you save the changes.
- **Disable Confirmit Branding -** check this box to remove all references to Confirmit for Reportal users, specifically:
    - The Confirmit logo in the top right of the Report list page.
    - The Confirmit copyright text in the bottom right corner.
    - Mentions of Confirmit in Reportal export emails.
- **Disable cookie information -** check this box to remove the standard "Cookie" text from the Reportal log-in page. This text informs users that Confirmit Reportal uses cookies. Whilst removing this text may be desirable for your branding purposes, read the Important note below first.
- **Report logo -** you can add a logo to the upper-right corner of the Instant Analytics report page (see Instant Analytics on page 673 for more information). Add the URL to your logo file into the Report Logo field, then save the changes. Note than you can use files stored in the File Library (see File Library on page 157 for more information).

Important
Depending on the country in which your Reportal users are located, providing information about the use of cookies may be necessary for your company to comply with local regulations. For more information, refer to the Confirmit website at https://www.confirmit.com/Cookie-Policy/.

Important
Saving automatically publishes the changes to the users' login page.

4.13.1.4. The Fiscal Calendar Tab

This tab allows you to set up non-standard fiscal calendars such that you can later create reports based on your company's accounting time-plan.

Users with the Company Administrator permission can set up calendars through the **Admin** menu or via the **Home > Company > Company Settings** menu.

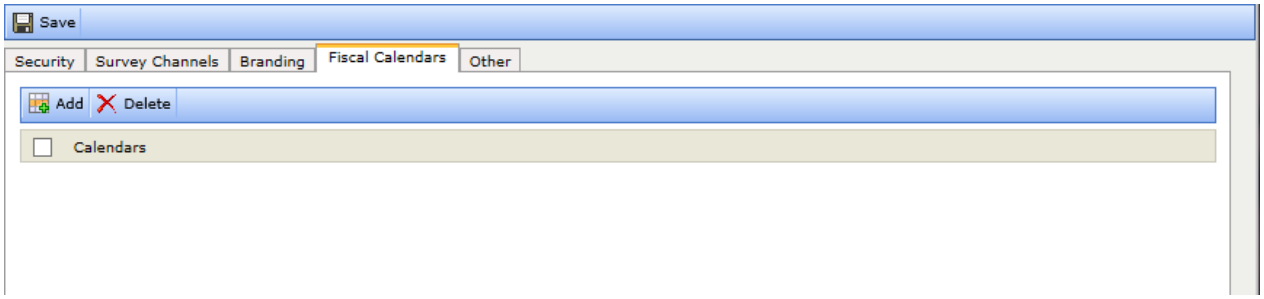


Figure 148 The Company Settings > Fiscal Calendar tab with no existing calendars

Note: The Fiscal Calendar functionality will be available only for reports using the Extended Tabulation Engine. Refer to the Reportal User Guide for further details on the Extended Tabulation Engine.

You can enter the calendar dates manually, or copy and paste from a tab-delimited .txt file created in another application such as Notepad .

4.13.1.4.1. How to Create a Fiscal Calendar Manually

To create a calendar and enter the dates manually:

1. In the Fiscal Calendars tab, click **Add**.

   A calendar is created and added to the list.

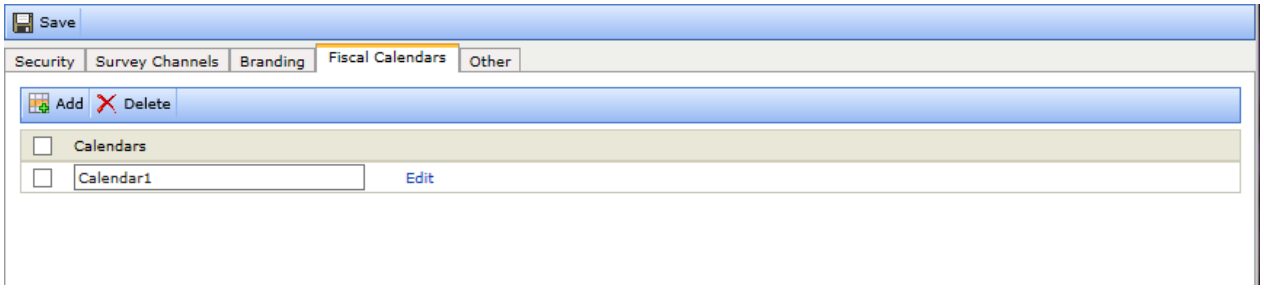


Figure 149 A new calendar is added to the list

2. Click into the calendar name field and change the name to something suitable.
3. Click **Edit** to open the calendar editing overlay.

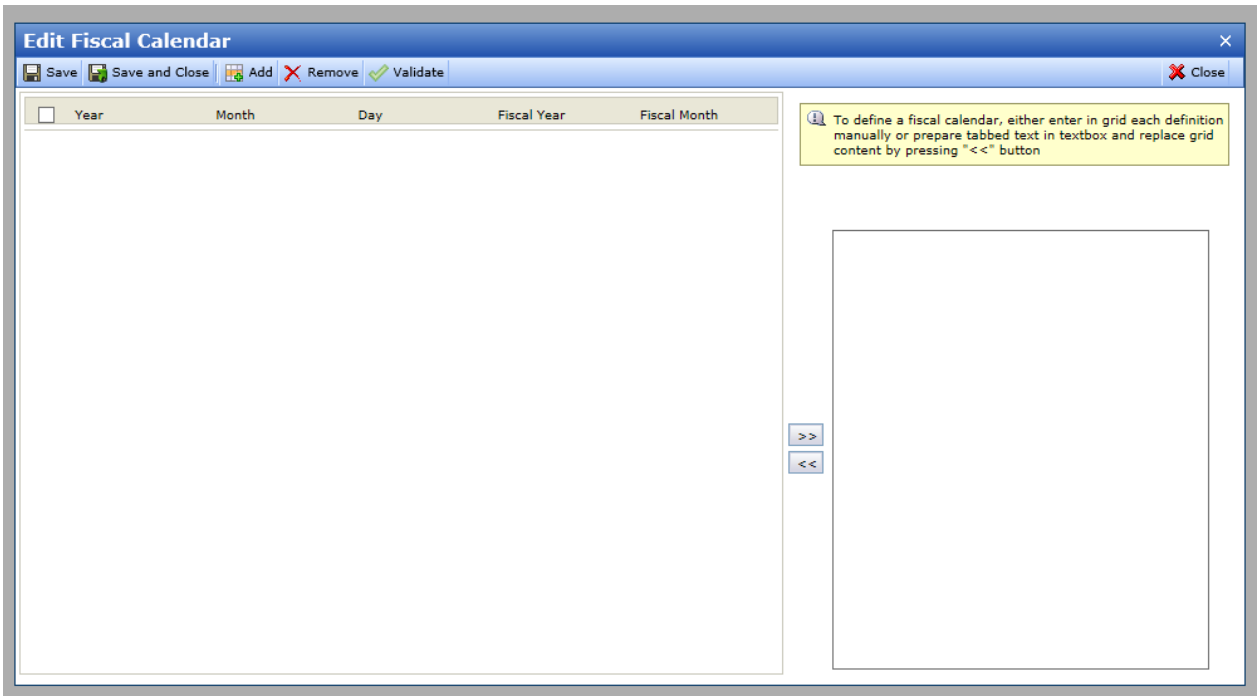


Figure 150 The empty editing overlay

4. Click **Add**.

   A default calendar is displayed.

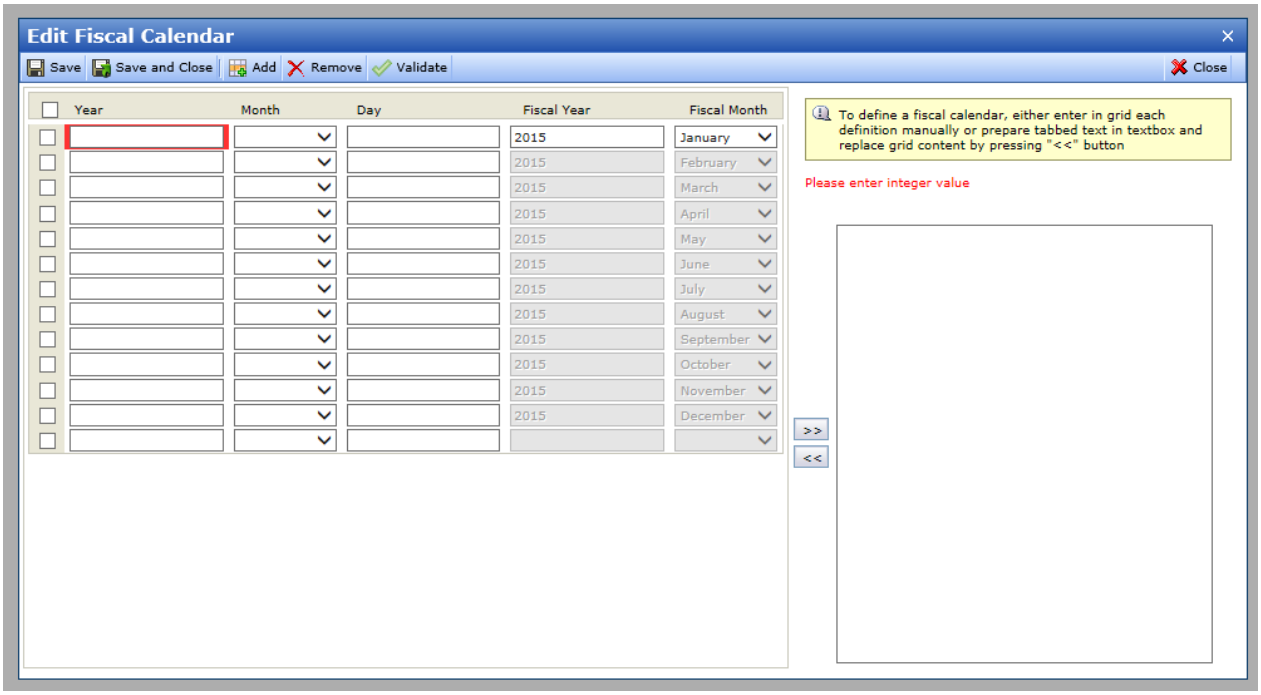


Figure 151 The default fiscal calendar that is created when you click Add

5. Fill in the year, select the month and fill in the day for each row as required.
6. On completion click **Save** to save the calendar.

To delete a row or rows from the table, check the relevant box(es) to the left of the row(s) and click **Remove**.

This calendar can now be used in your Reportal reports. Refer to the Reportal User Guide for further information.

4.13.1.4.2. How to Copy and Paste a Fiscal Calendar

Note: The data must be available as a tab-delimited txt file, with the columns in the order Year Month Day.

To copy the data into the fiscal calendar from a .txt file:

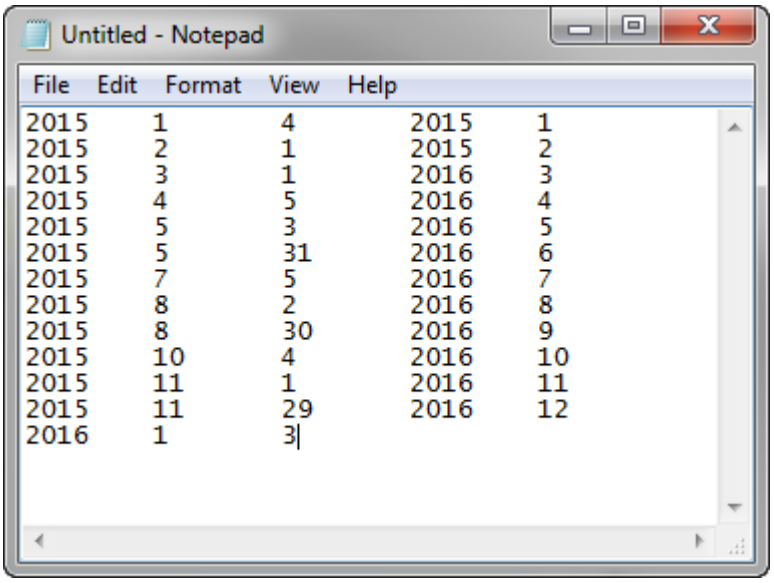
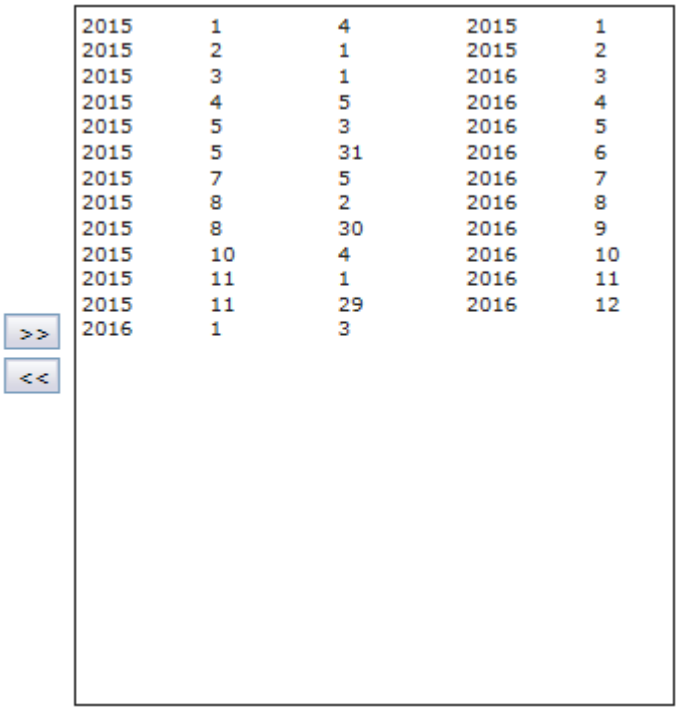


Figure 152 Example of a .txt file from which the calendar dates can be copied

1. In the tab-delimited .txt file, select and copy the required information, then return to the Fiscal Calendar tab, click into the field on the right, right-click and select **Paste**.

Note: In a FireFox browser, you must first click Add to create a row in the table, then click into the row and click Paste to copy the data in.

The data is copied into the field.



2. Edit the data if required, then when it is correct click the **<<** button.

   The data is copied into the appropriate columns of the calendar.

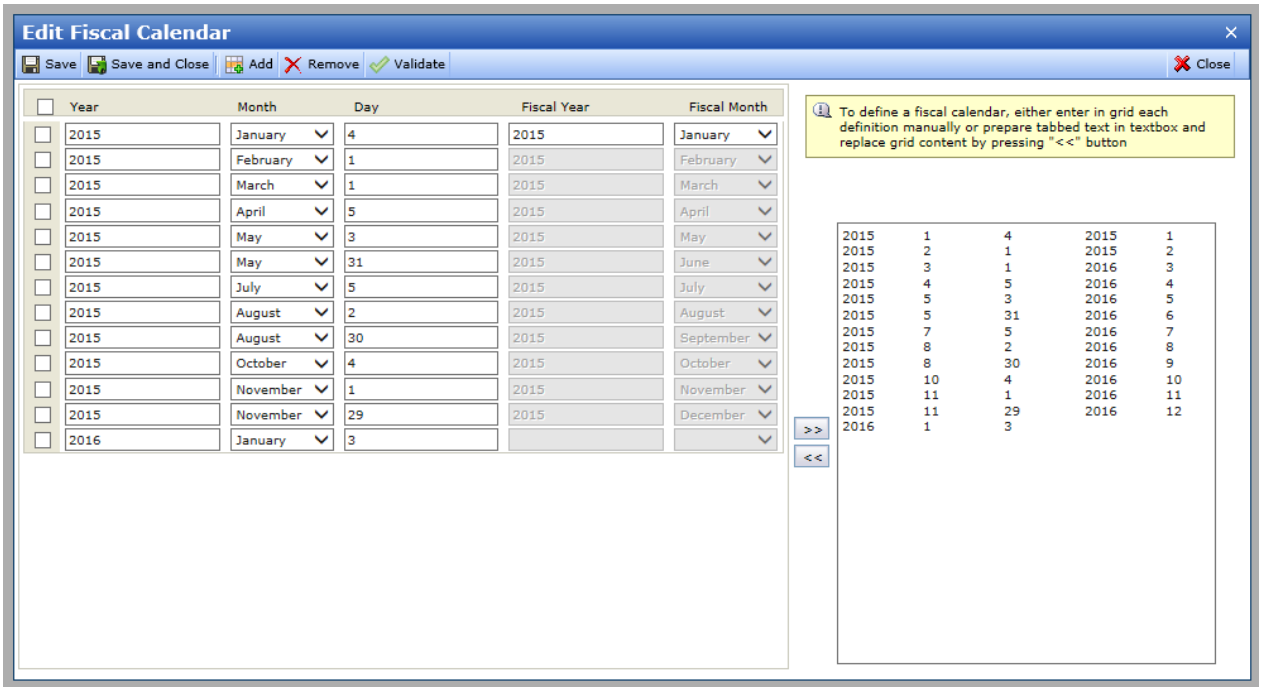


Figure 153 The data copied into the calendar

3. In the Fiscal Year column set the start year and select the start month.

For the example these are 2015 and January. The Fiscal Year and Fiscal Month columns are then populated.

4. Click **Save** to save the changes.

To delete a row or rows from the table, check the relevant box(es) to the left of the row(s) and click **Remove**.

This calendar can now be used in your Reportal reports. Refer to the Reportal User Guide for further information.

4.13.1.5. The Other Tab

To access the options on the Other tab, go to the **Home > Company > Company Settings** menu command and select **Other**. The tab opens as shown below .

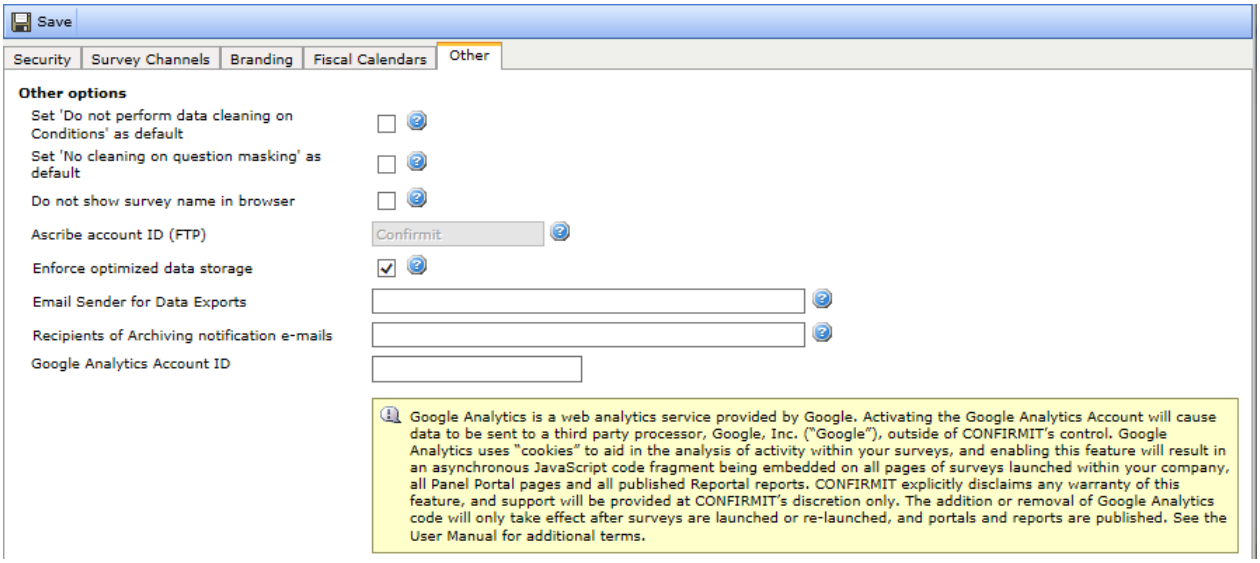


Figure 154 The Company Settings > Other tab

Note: Users with the Company Administrator permission will have access to the properties above. System Administrators will have access to some additional properties - refer to the Confirmit Administrator Manual for further details.

The options are as follows:

- **Set "Do not perform data cleaning on Conditions" as default -** In Confirmit Designer, if a condition evaluates to FALSE, the answers to all questions inside the THEN folder are deleted. (If it evaluates to TRUE and has an ELSE folder all the answers to the questions inside the ELSE folder are deleted.) This is to ensure consistency in the data if the respondent moves back and forth in the questionnaire and changes his/her answers (if you have allowed the respondents to modify their answers). However sometimes you do not want to delete the previously entered data. This could for example be in a questionnaire where the respondent is allowed to re-enter, but should only get access to some of the questions or a different set of questions than the first time. In a Condition's Details page, the author can check the "Do not perform data cleaning" property to prevent deletion of the answers inside a THEN or ELSE folder with a check that this is the first or second time the user accesses the survey. However, as the administrator you can check this box to set the property as default for the entire company.
- **Set "No cleaning on question masking" as default -** Under normal circumstances, if a Question Mask evaluates to FALSE, the question is hidden and the answers to the question are deleted. This is to ensure consistency in the data if the respondent moves back and forth in the questionnaire and changes his/her answers (if you have allowed the respondents to modify their answers). However sometimes you do not want to delete the previously entered data. The question property "No cleaning on Question Masking" will prevent this cleaning. A system or company administrator can select the company setting "Set 'No cleaning on Question Masking' as default" for the entire company.

- **Do not show survey name in browser title -** When this setting is enabled, the browser title will contain the URL for the survey and the survey name will not be displayed, irrespective of what is defined in the survey or mobile layout, for all rendering modes. This setting is only applied after launching a survey and cannot be overridden with a survey setting.
- **Ascribe account ID (FTP) -** Use this field to view the Ascribe ID used for transferring Ascribe exports. Ascribe(TM) is an application for coding open text (verbatim) responses, provided by Language Logic (http://www.languagelogic.info) and is not part of the Confirmit offering or part of any product of service provided by Confirmit Company. The Ascribe export will give an XML file with questionnaire and codebook definitions, as well as response data. It gives you a simple way to transfer the data from Confirmit to Ascribe. To use the FTP option, your company's Confirmit account must be set up with the correct FTP settings for the Ascribe FTP site. You must establish an Ascribe account by contacting Language Logics directly, and you will receive the relevant FTP account name from them.
- **Enforce optimized data storage** - Enabling this option will enforce that all survey databases created will be in the optimized database format, the legacy database format will not be available as an option. This setting applies to all new surveys created, either via the **New Survey** menu item, duplication of an existing survey or by importing of a survey XML. Any existing surveys created in the legacy format will remain in this format even if re-launched.
- **Email Sender for Data Exports** - if you wish to set up a standard Sender email address for your company, type the address here. This address will then be used throughout the company as the Sender address for data exports sent via email, FTP notifications and 'Failed import / export' emails to the user.
- **Recipients of Archiving notification emails** - notification messages regarding the archiving of projects for your company will be sent to the email addresses specified in this field in addition to the project creator (see Archiving on page 51 for more information). This allows management of archiving processes even if the person who actually created the project is unavailable or has left the company. You can specify one or several e-mail addresses on the company level, separated by semi-colon (;).
- **Google Analytics Account ID -** Use of this feature causes data to be sent to a third party processor (Google) outside CONFIRMIT's control.CONFIRMIT explicitly disclaims any warranty of this feature, and support may be provided at CONFIRMIT's discretion only (see Integration with Google Analytics on page 10 for more information).

4.13.2. Company > Transaction Usage Export

This menu item allows users with the SYSTEM_COMPANY_ADMINISTRATE permissions to export transaction usage data. A tab-delimited text file is created and zipped, then attached to an email.

1. Go to the **Home > Company > Transaction Usage Export** menu command.

   The Transaction Usage Export overlay opens.

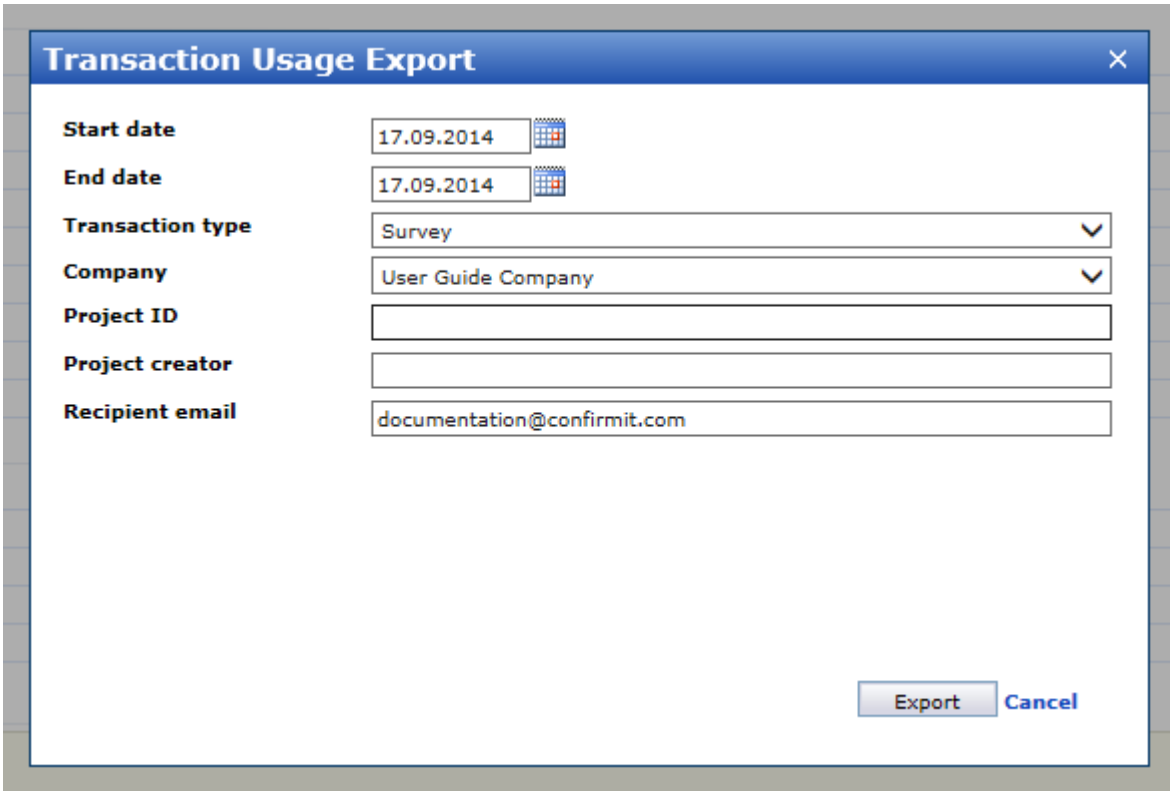


Figure 155 Example of the Transaction Usage Export overlay

2. Set the start and end dates for the transactions you wish to export.

   Note that the dates are "inclusive", that is all the transactions performed on or between the specified dates will be included, and the maximum interval can be 90 days.

3. Select the transaction type you wish to export - Survey or Report.

   If the selected transaction type is Survey the activities are grouped by ProjectID. If the transaction type is Report the activities are grouped by Description.

4. The Company drop-down lists all the companies to which you have access. If you administrate more than one company, select the company for which you wish to export the transactions.

5. Specify the project id and/or project creator if you wish to filter the transactions on these parameters.

6. Set the email address for the recipient (default is the current user - you).

7. Click **Export**.

   The transaction log is created as a tab-delimited .txt file, encrypted if required in the system setup, attached to an email and sent to the recipient.

The following transaction activities are exported:

- For surveys:
  - Complete - Registration Survey
  - Interview complete - CAPI
  - Interview complete - CATI
  - Interview complete - CAWI
  - Interview complete - Sample Only

- Interview Medium
- Interview Mini
- Interview Poll
- Interview Small

- For reports:
  - Open report generated
  - Reportal export
  - Respondent Report PDF Export

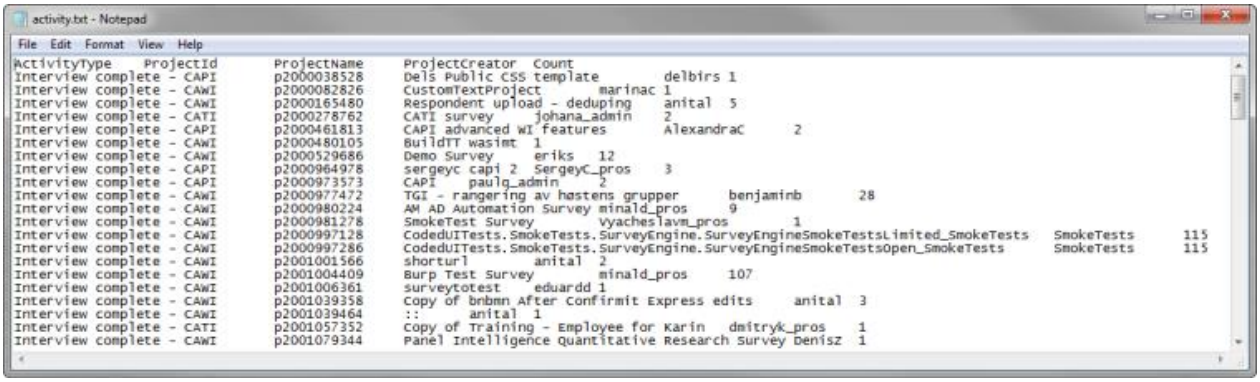


Figure 156 Example of part of a transaction log file

4.13.3. Company > Email Activity Log

Company Administrators have access to the **Email Activity Log**. This report shows the number of emails sent for the current company per survey. The report can be grouped by date, weekday, week, month, quarter or all.

1. In the Interval drop-down, select the grouping you wish to use, then click **Search**.
2. In the resulting list, click on the appropriate interval to open a table detailing the number of emails sent per survey for that interval.

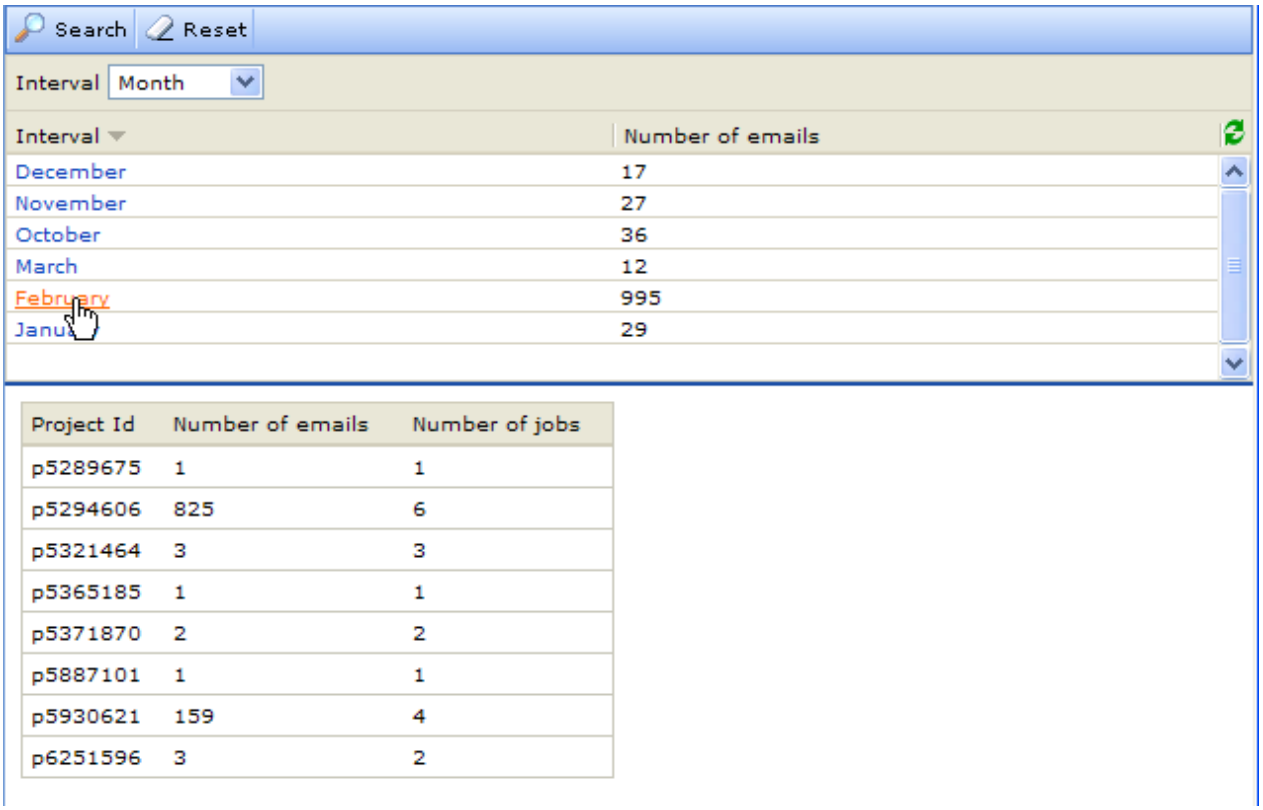


Figure 157 Example of the Email Activity Log for February

4.13.4. Company > Company Activity

This functionality enables the company administrator to track the use of all transaction types in Confirmit Horizons within their own company. Go to **Home > Company > Company Activity** to open a search form. In this window you can:

- Search for activities in a specific time period: yearly, monthly, weekly, daily, hourly.
- Filter the search on Activity type, Project ID, Project name and/or Project creator.
- Sort the result by four different levels (“Group by – then by – then by – then by”).

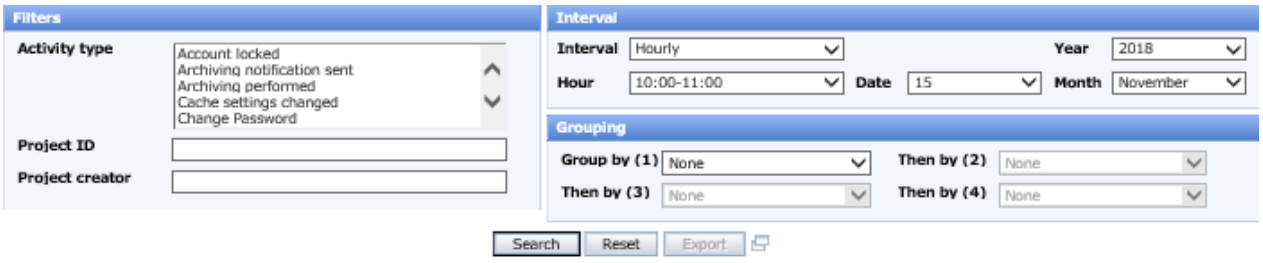


Figure 158 Company activity search fields

You can select a time interval for the search in the Interval area of the page.

You can select a specific project or all projects. To select an item, click on it with the left mouse button to highlight it. If nothing specific is selected when you click **Search**, all project creators and all projects are selected.

The Activity Type field is multiple-choice, that is, you can run a search for several activities simultaneously. Press the **Ctrl** key on your keyboard while selecting to select additional activities. The Activity types that you can search for are:

Account locked
Archiving notification sent
Archiving performed
Cache settings changed
Change Password
Cleaning of PII variables
Clear responses
Complete - Registration Survey
Create project
Create survey layout
Data Central Operation
Data cleaning delete
Data cleaning delete (panelist)
Data cleaning delete (respondent)
Data cleaning update
Database is prepared/compiled
Delete Current Response
Delete Hub
Delete Hub Source
Delete project (permanent)
Delete project (softdelete)
Delete records (from rule)
Delete Rule
Delete RuleSet
Delete survey layout (permanent)
Delete survey layout (softdelete)
Delete Triple-S Template
Delete User
Duplicate project
Duplicate survey layout
Edit survey layout
Email address of user has been changed
Email sent
External data uploaded (inserts)
Failed Login
Free Reportal Export (e.g. Single-Page Excel)
Generic SSO
Index created
Interview complete - CAPI
Interview complete - CATI
Interview complete - CAWI
Interview complete - Sample Only
Interview complete - Self-completion
Interview generated
Interview Medium
Interview Mini
Interview Poll
Interview Quota Full - CAPI
Interview Quota Full - CATI
Interview Quota Full - CAWI
Interview Quota Full - Self-completion
Interview Screened - CAPI
Interview Screened - CATI
Interview Screened - CAWI
Interview Screened - Self-completion
Interview Small
Interview Unknown - CAPI
Interview Unknown - CATI
Interview Unknown - CAWI
Interview Unknown - Self-completion
Login event
Login event - Duplicate
New user
Open report generated
Panel settings changed
Panelist registered mobile device
Project accessed
Project has been permanently deleted due to
Project has been set to delete on specific date
Push messages sent to panelists mobile devices
Recoding of variables
Removing a project from a combined source
Reportal export
Respondent Report PDF Export
Restore a soft-deleted project
Start Panelist Deletion
Start Respondent Data Deletion
Start Survey Data Deletion
System Admin Login
Task Disabled
Text Analytics entries processed (all)
Text Analytics entries processed (new)
The granted permission set does not reflect the users assigned user level.
The number of events in aggregated_activities has been changed
The number of page hits in an interview
Update User
User accesses questionnaire designer
User has started prepare/compile of database

Depending on the data that is logged for each activity type, you may have the possibility to group the results. Not all group alternatives are allowed for all activities. If an illegal selection is made, a message appears with information regarding this. In the list box “Group by” there are two permanent options: Project ID and User, and depending on the search time interval selected you will be able to group by more detailed intervals.

Note: Not all searches may be successful. In cases when you receive a Timeout expired message, try to break down your search, for example into smaller time intervals.

4.14. Help

The **Home > Help** submenu contains the following:

- **Confirmit extranet –** opens the Confirmit extranet. Here you can download the latest revisions of the Confirmit User Guides in PDF and CHM formats. Customers with On Premise installations may choose whether they want to have access to the extranet or to have the latest updated Help pages in Confirmit on their server.
- **Public PGP Key -** opens a page with the public PGP encryption key for the user (see Data Transfer Encryption and FTP on page 6 for more information).
- **Language overview –** opens a list of the languages that are available on the SaaS server. Note that the same list is included in Appendix B in this User Manual.
- **3rd Party Software -** opens a page listing the 3rd-party software components used in Confirmit, and describes the copyrights and any restrictions and attributions applicable.
- **About** – information about the Confirmit build you are using.

(see Getting Help on page 23 for more information)

4.15. Exiting Confirmit

To log off Confirmit, go to the **Home > Log Off** menu command or click on the key symbol in the upper right corner of the Confirmit window.

When you log off, you are taken to the Confirmit Login page.

5. File Library

The File Library is an area on the server where Confirmit users can be allocated their own domains in which they can store smaller files, for example image files, to be used in surveys or reports. While files are stored in the File Library they will always be available to the user and his/her surveys and reports. This will avoid the problem of for example a logo suddenly no longer being visible in a survey because a link has changed.

Confirmit offers CDN (see CDN on page 159 for more information).

Note: The file types that you can upload are restricted depending on the type of access your company has licensed (see Limitations on page 157 for more information). Note also, the File Library functionality is not available for Standard users (see Standard Users on page 3 for more information).

To access the File Library, go to the **Home > File Library** menu command or click the **File Library** link in the Quick Access pane. The folder opens as shown below.

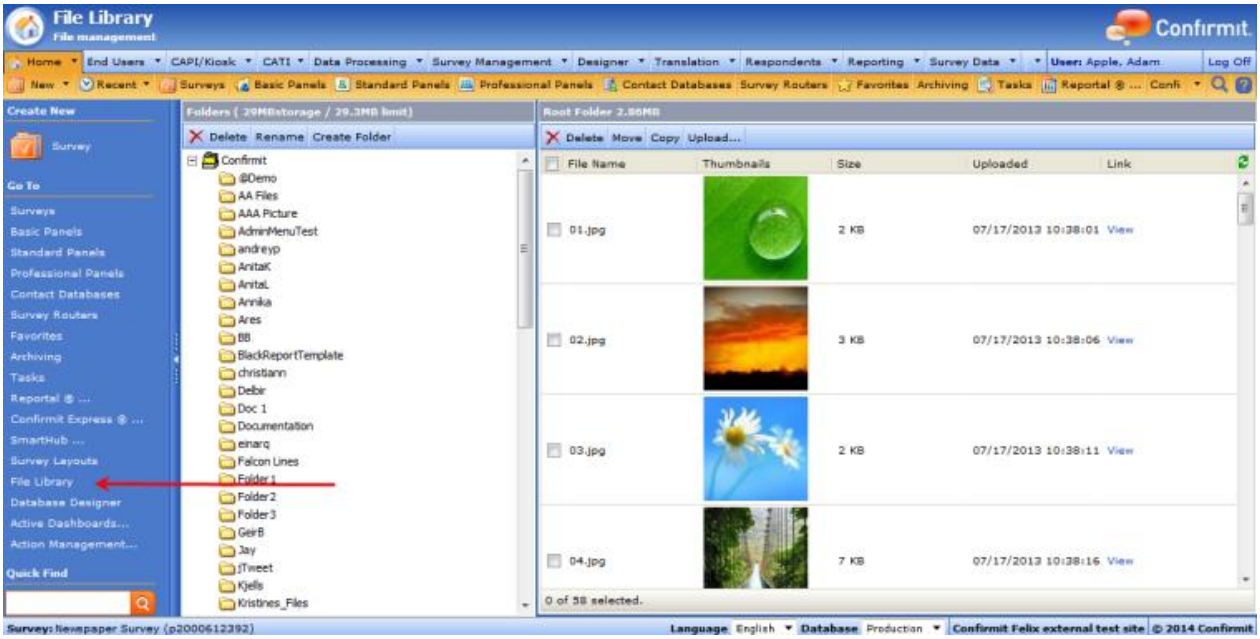


Figure 159 Example of a File Library folder

5.1. Limitations

Important
The free-of-charge storage space for the File Library for Software as a Service (SaaS) clients has been increased to 20 MB at Company level for new users; existing users' allocations remain unchanged. Additional space can be allocated if required (fees apply). If you require more space then contact your Account Manager at Confirmit or send an email to support@confirmit.com.
On-Premise clients must contact their Confirmit server manager.

The File Library has three access levels as listed below. Note that the File Library access level is a company setting, so all Confirmit Professional users in the company will have access to the same file set.

- **Standard** - allows upload of jpg, gif, bmp, jpeg, tif, png and ico files.
- **Enhanced** - allows upload of jpg, gif, bmp, jpeg, tif, png, ico, css, htm, html, js, swf, pdf, xml, txt, ppt, doc, emf, flv, zip, htc, woff, woff2, ttf, otf, svg, eot, pptx and docx files.

- **Multimedia** - allows upload of jpg, gif, bmp, jpeg, tif, png, ico, css, htm, html, js, swf, pdf, xml, txt, ppt, doc, emf, flv, zip, htc, woff, woff2, ttf, otf, svg, eot, pptx and docx, avi, mpeg, mpg, mov, rm, wmv, wma, mp3, m3u, wav, aiff, cur, mp4, ogg and webm files.

Note: The file types that can be uploaded are controlled by the system administrator. For SaaS users this will be Confirmit, while for On-Premise users this will be your local system administrator. The files available to you may therefore differ from the lists above.

In addition, the following limitations apply:

- The File Library is designed for storing images in the 10KB - 1MB range - it is not intended for uploading and storing large files. The upload limit for the server is set to 10MB, however we recommend you upload only files considerably smaller than this.
- For SaaS Clients, you are only allowed to refer to files in File Library from surveys or reports running on the Confirmit SaaS Environment.
- In the Confirmit SaaS Environment, upon request, you may be offered the ability to store file types additional to those detailed in "Standard" and "Enhanced" below. Please note that although you may be allowed to use some additional file types, such use will not fall within what is supported by Confirmit and is therefore at your own risk.
- The SaaS Environment site does not support streaming. As such, use of audio / video files (if you have been granted such ability upon request to Confirmit) will normally cause respondents to experience delays in viewing pages - potentially several minutes before the file is available to them.
- If you plan to use audio / video files in surveys and reports, Confirmit recommends that you contact a specialized streaming provider, and include a link to that site from the Confirmit survey.

5.2. General Information

The File Library can be accessed by all Professional users within a company (see Professional Users on page 2 for more information), and all users in a company will have the same access level. This means that if there are several Confirmit authors in a company, then all of them will have access to all files stored in the File Library by any of the other users. Confirmit therefore strongly recommends that to simplify navigation and file location, each user creates his/her own folder in which to store their files.

Access the File Library either via the **Home > File Library** menu command or by clicking the **File Library** link in the Quick Access pane. When you enter the File Library for the first time, you are presented with the following screen.

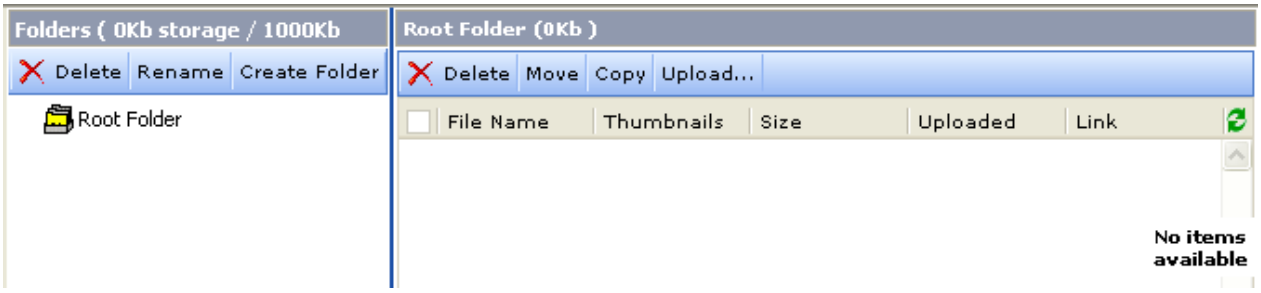


Figure 160 An empty File Repository

- The column to the left shows the folder hierarchy in which the files will be stored and displayed. You can store your files directly in the Root Folder, but we strongly recommend that you sort your files into folders. This applies especially to companies in which more than one user has access to the File Library, because all users will have access to all the files in the File Library.
- The area to the right displays the files that are stored in the selected/active folder.
- The total storage space currently used in the repository, and the total space allocated to the company, are displayed in the upper frame of the window above the left column. In the example above, the values are 0 KB and 1000 KB respectively.

- The name of the active folder, and the storage space used by the files in this folder, are displayed above the area to the right. In this example these are Root Folder (0 KB).

5.3. CDN

The Content Delivery Network (CDN) is a network of servers spread around different geographical locations that all synchronize the same content. Files that are uploaded to the Confirmit File Library are automatically synced to Confirmit's CDN servers around the world. When a respondent enters a page in a survey, any images and other content that are located in the File Library are delivered from the server closest to the respondent. This ensures the shortest possible download times and thereby the best respondent experience.

Note: Confirmit CDN is only available for SaaS clients.

How to use CDN in your surveys

All you need to do to gain the CDN performance benefits is modify the linked file's URL. Specifically, you must use absolute links and replace the first part of the URL for those files with **cdn.us** for Confirmit US, **cdn.euro** for Confirmit EURO or **cdn.confirmit.com.au** for Confirmit Australia. For example:

The URL to a file linked without using CDN could be: **/isa/<key>/<folder>/<filename>.<ext>**

The URL to the file with CDN (US Site): **https://cdn.us.confirmit.com/isa/<key>/<folder>/<filename>.<ext>**

The URL to the file with CDN (Euro Site):
https://cdn.euro.confirmit.com/isa/<key>/<folder>/<filename>.<ext>

The URL to the file with CDN (Aus Site): **https://cdn.confirmit.com.au/isa/<key>/<folder>/<filename>.<ext>**

5.4. How to Upload Files to the File Library

You can upload several image files and/or .zip files simultaneously. The files can either be dragged and dropped (Firefox, Chrome (see Uploading Using Chrome or FireFox on page 162 for more information)) or selected (IE < 10 (see Uploading Using IE on page 160 for more information)). In the event you are using IE < 10, Adobe flash player is required. If it is not installed, the old version of the uploader will be used as a fallback.

The upload process starts immediately after you have dropped (or selected) the files. A progress bar is displayed for each file in addition to a progress bar showing the total upload progress. can copy the links to all successfully uploaded files after the upload is complete and at least two files have been uploaded successfully. The files are uploaded and validated individually, so all valid files in the upload bulk will be uploaded.

A .zip file is automatically unzipped after successful upload and validation. Note that if one of the files in the .zip file is invalid (it is too large or of an unacceptable file type), then the entire zip file is rejected.

If you wish to upload some pictures into the File Library, you should first ensure that you have a "personal" folder in which to store them. Proceed as follows:

1. To create your own folder - click on the **Root Folder** icon to select it, then either click the **Create Folder** button or right-click on the **Root Folder** and choose **Create Folder** from the menu.

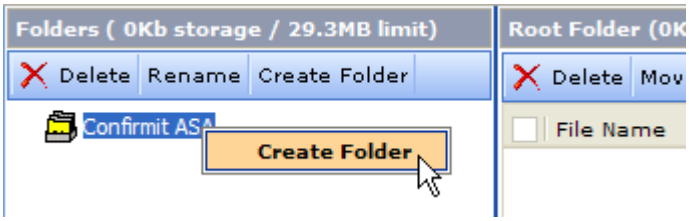


Figure 161 Creating a new folder

A new folder is created and activated.

2. Give the folder a descriptive name.

Use for example your name to indicate that your files are stored there, or your client company's name to indicate that the files used in their surveys are stored there.

To do this, right-click on the folder and choose **Rename** from the menu, or highlight the text next to the folder and press the **F2** key on your keyboard.

Note: The following characters cannot be used in folder names in the File Library: + % / \ ? # $ & * | : . , " < >. In the event you attempt to use an illegal character, a warning message is displayed and the name-change will not be allowed.

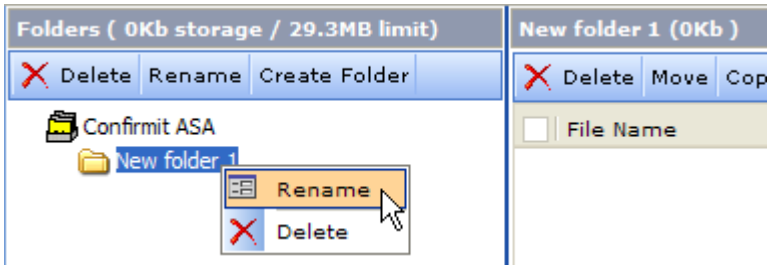


Figure 162 Renaming the new folder

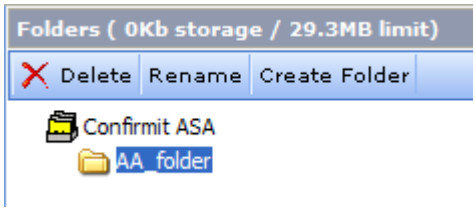


Figure 163 The renamed folder

The folders you create are displayed in the Folders frame.

5.4.1. Uploading Using IE

To upload a file into a folder when using Internet Explorer:

1. In the Folders column, double-click on the name of the folder into which you wish to upload the file to activate the folder.

   If you wish to upload a file to the Root Folder level, double-click on the Root Folder name.

2. Click the **Upload...** button.

   A third frame opens.

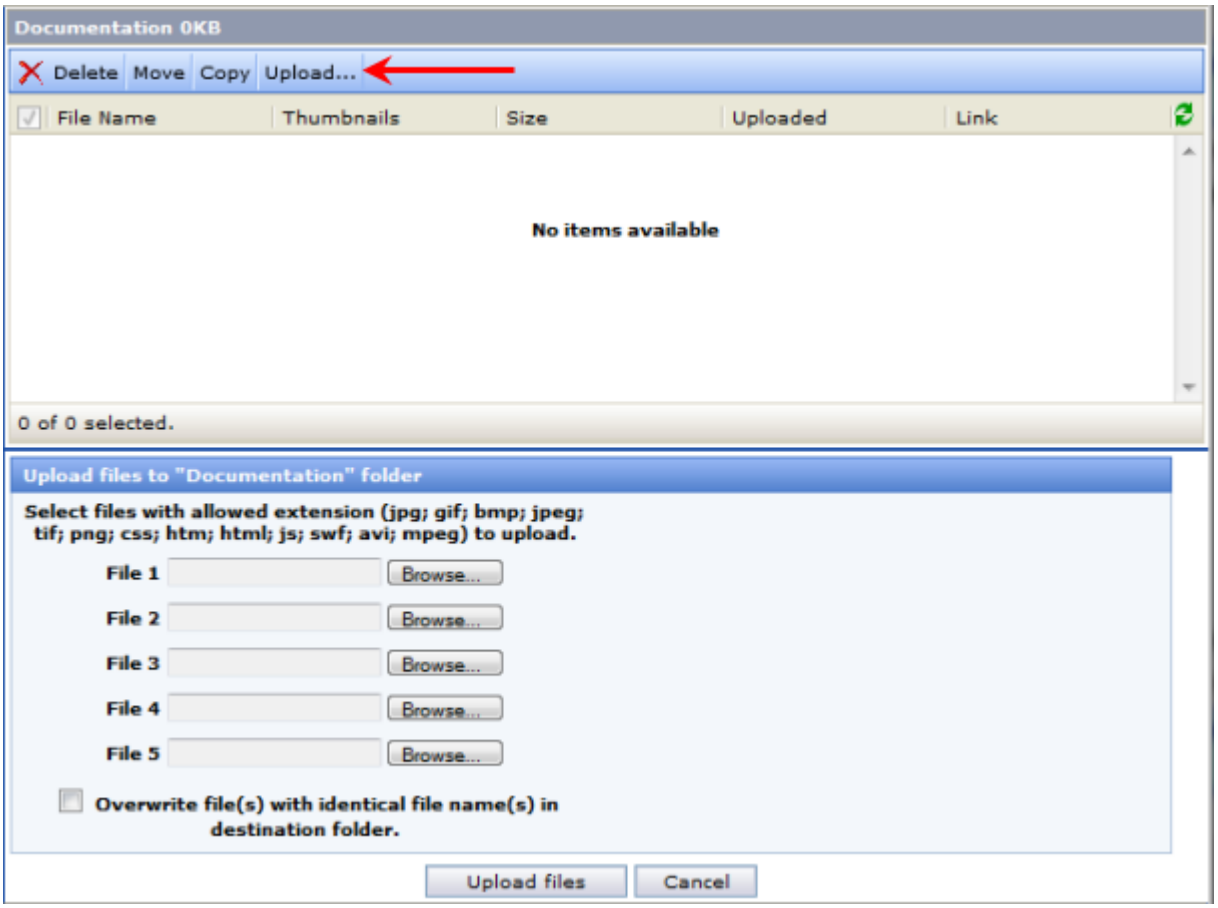


Figure 164 Uploading files in IE

3. Browse to the files you wish to upload, then click **Upload**.

   You can select and upload up to five files simultaneously.

   The uploaded files will be displayed in the File Library frame. The file name, its thumbnail view, its size, the date when the file was uploaded, and the link to the file, are displayed.

Note: Never use blank space in the file name. If you wish to create space between parts of the file name, use underscore (_).

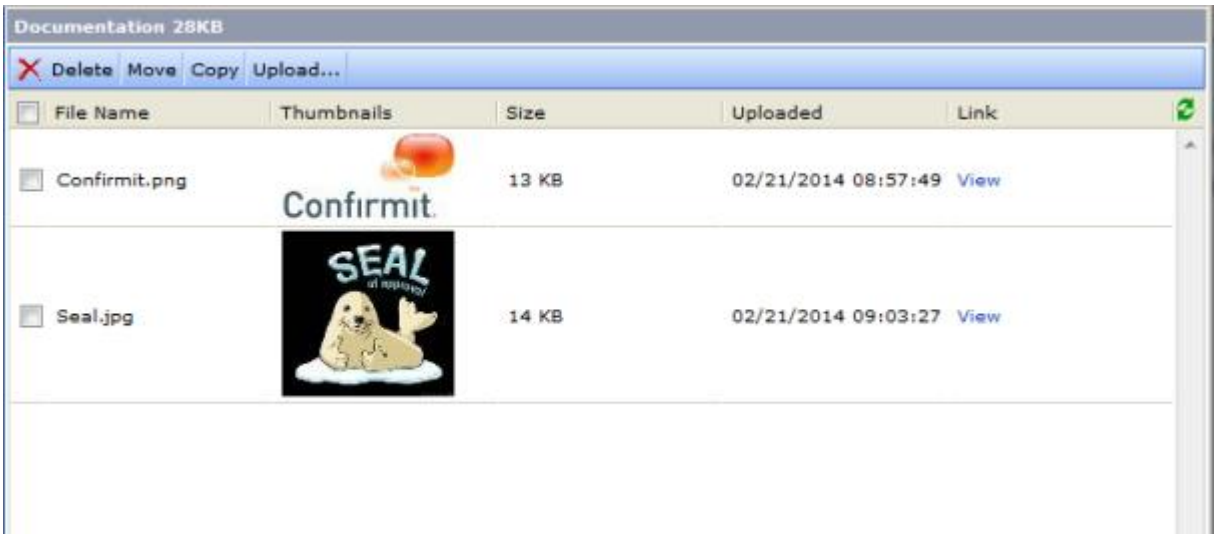


Figure 165 Example of uploaded files

The volume of the storage space used is specified in the gray bar at the top of the frame.

Click on the **View** link to display the link to the file. This is the link that you must use when referring to the file in surveys or templates.

Note: If you upload a file that has the same name and is of the same type as a file that already exists in the folder, the new file will overwrite the existing/old one.

If the files you wish to upload require more space than is currently available for your company, a warning will be displayed and any files that fit into the remaining space available, will be uploaded.

5.4.2. Uploading Using Chrome or FireFox

To upload a file into a folder when using Chrome or FireFox:

1. In the Folders column, double-click on the name of the folder into which you wish to upload the file to activate the folder.

   If you wish to upload a file to the Root Folder level, double-click on the Root Folder name.

2. Click the **Upload...** button.

   The Upload files to... frame opens.



Figure 166 Uploading files in Chrome or FireFox

3. Click **Select Files**.

   A new file selection window opens.

4. Browse to the files you wish to upload and drag them across to the "Drop files here" area.

   You can select and drag multiple files. Progress bars then open for the individual files and for the total process. On completion the appropriate messages are displayed.

   The files will be uploaded and displayed in the File Library frame. The file name, its thumbnail view, its size, the date when the file was uploaded, and the link to the file, are displayed.

Note: Never use blank space in the file name. If you wish to create space between parts of the file name, use underscore (_).

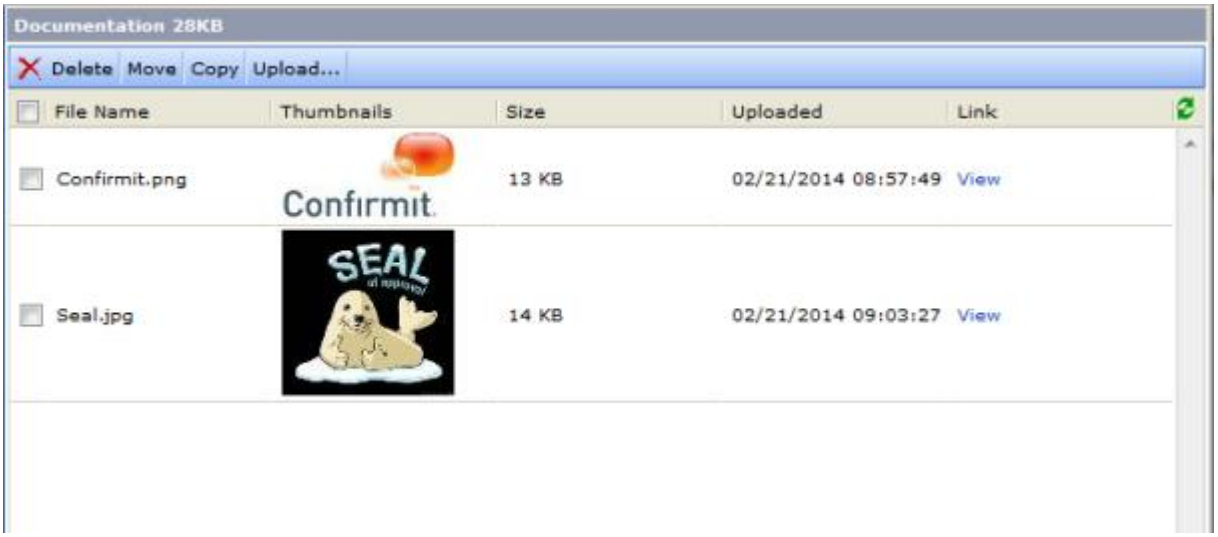


Figure 167 Example of uploaded files

The volume of the storage space used is specified in the gray bar at the top of the frame.

Click on the **View** link to display the link to the file. This is the link that you must use when referring to the file in surveys or templates.

Note: If you upload a file that has the same name and is of the same type as a file that already exists in the folder, the new file will overwrite the existing/old one.

If the files you wish to upload require more space than is currently available for your company, a warning will be displayed and any files that fit into the remaining space available, will be uploaded.

5.5. Moving and Copying Files

If you wish to move files between folders:

1. Select the files you wish to move and click the **Move** button in the button bar towards the top of the window.

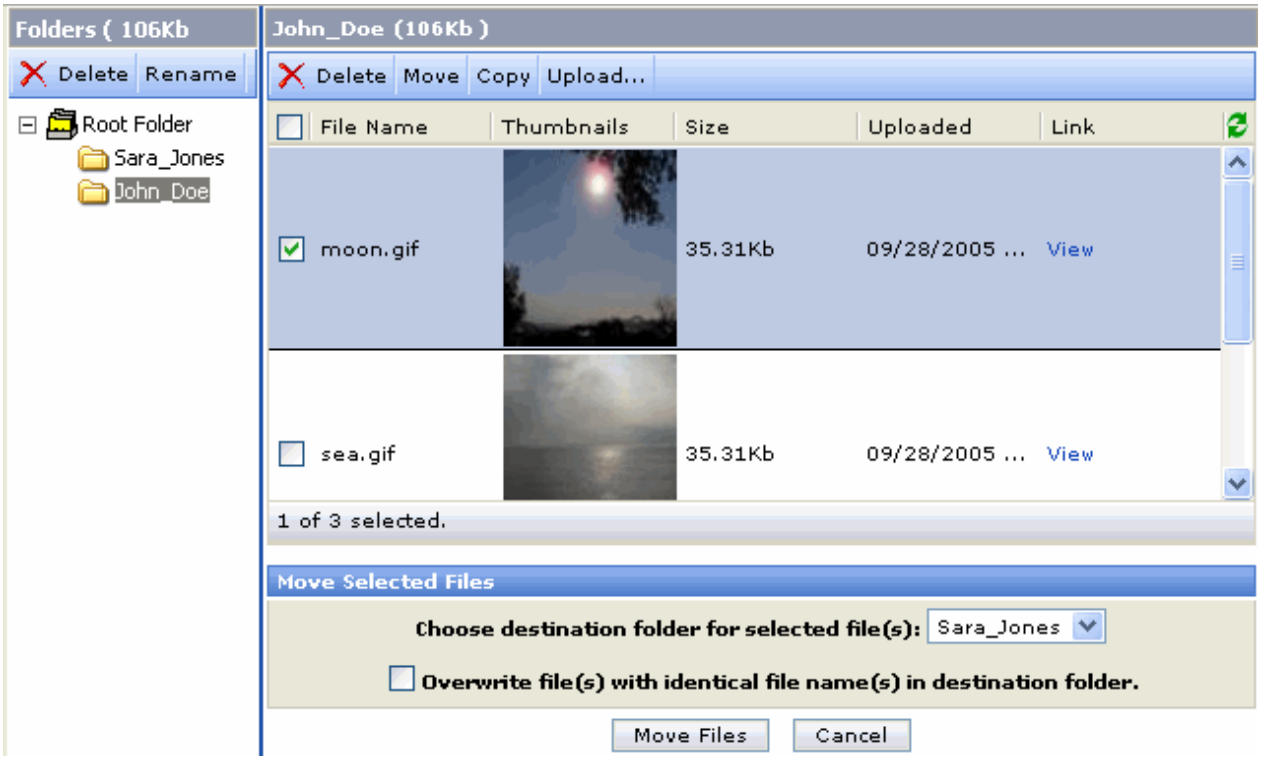


Figure 168 Moving files

2. In the Move Selected Files dialog, choose the folder to which you wish to move the selected files.
3. If files with identical names already exist in the destination folder, specify whether the files you are moving should overwrite the existing files.
4. Click **Move Files**.

The files are moved from the original folder to the destination folder. The files will only be stored in one place.

If you wish to copy a file to another destination:

1. Choose the file or files and click the **Copy** button.
2. In the Copy Selected Files dialog, choose the folder to which you wish to copy the files.
3. If files with identical names already exist in the destination folder, specify whether the files you are copying should overwrite the existing files.
4. Click **Copy Files**.

The files are copied from the original folder to the destination folder. That is, they will be stored in both places.

If a file with an identical name already exists in the destination folder and you do not choose the option “Overwrite file(s) with identical file name(s) in destination folder”, a warning is displayed informing you that the file already exists in the destination folder.

5.6. Using Images and Other Files From the File Library

Once you have stored a file in the File Library, you can safely use that file in your surveys. You can add images into all text fields in a questionnaire page (title, text, instruction and answers). For the Title, Text and Instruction fields on the Text tab, you must work in "Plain text" mode and type or copy the URL to the file into the appropriate field (see How to Include an Image in a Text Field in HTML Source Mode on page 165 for more information). For the Answer fields, you can drag-and-drop the images directly from the File library (see How to Include an Image in WYSIWYG Mode on page 166 for more information). Once an image is in a field, you can resize it and delete it as necessary (see How to Resize and Delete an Image on page 171 for more information).

Note: The drag-and-drop functionality can only be used in the answer lists, and only when you are working in the WYSIWYG mode.

5.6.1. How to Include an Image in a Text Field in HTML Source Mode

To include an image in a field on the Text tab when you are working in HTML Source mode, proceed as follows:

1. Open the page in the questionnaire into which you wish to add an image (or other file).
2. On the Text tab, click the **Switch Between Modes ...** button as necessary to go to the **HTML Source** mode.

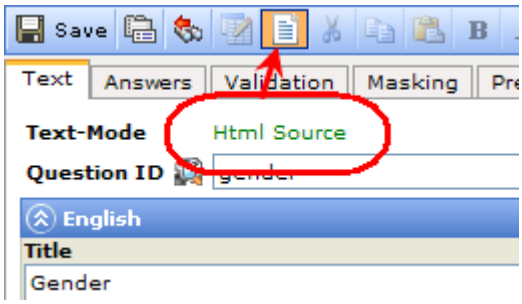


Figure 169 Select the HTML Source mode

3. In the field in which you want the image to appear, type the following:

```
<img src="/isa/<URL_of_the_image>">
```

Note that you can copy the URL from the File Library. To do this, click the **View** link for the appropriate file in the File Library folder, then in the overlay that opens, click **Copy to clipboard** and paste the link URL into the appropriate text field.

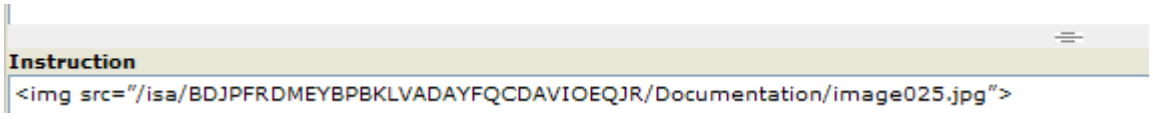


Figure 170 Example of the HTML URL code to an image in the File Library

4. On completion, save the changes.

You can now click the **Switch Between Modes** button to go to WYSIWYG mode and view the image in the text field. If you are using Internet Explorer, then in this mode you can also resize the image by dragging the resizing grips as required. If you do this and later return to the HTML Source mode, note that Height and Width codes have been added to the URL. You can alter these "manually" as necessary to specify the size of the image.

5.6.2. How to Include an Image in WYSIWYG Mode

To include an image in a field on the Text or Answer tabs when in the WYSIWYG mode, proceed as follows:

1. Open the page in the questionnaire into which you wish to add an image (or other file) and go to the appropriate tab.
2. Ensure you are in the WYSIWYG editing mode (circled to the left). If not, click the **Switch between WYSIWYG mode and HTML Source mode** button circled to the right in the figure below. If you are in the Answers tab you must be in the DHTML Answerlist mode - click the **Switch answer list mode** button (arrowed to the left in the figure) and select the mode.
3. Once you are in the WYSIWYG mode (and DHTML Answerlist if appropriate), right-click in the appropriate text field, and select **Find Image**.

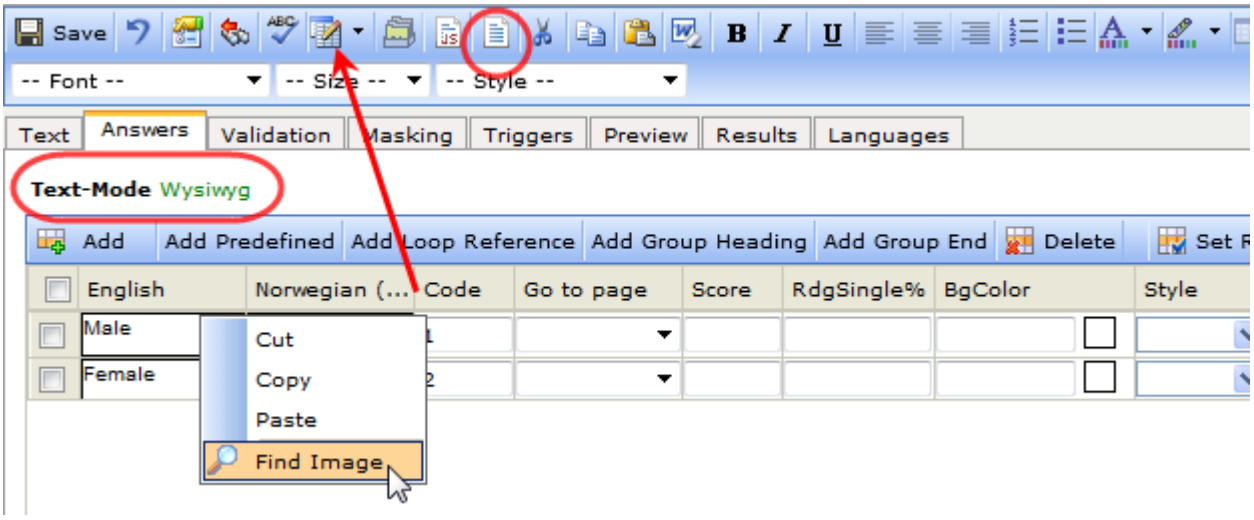


Figure 171 Select the WYSIWYG editing mode then find the image

The File Library window opens below the question form in the Root Folder, as shown below.

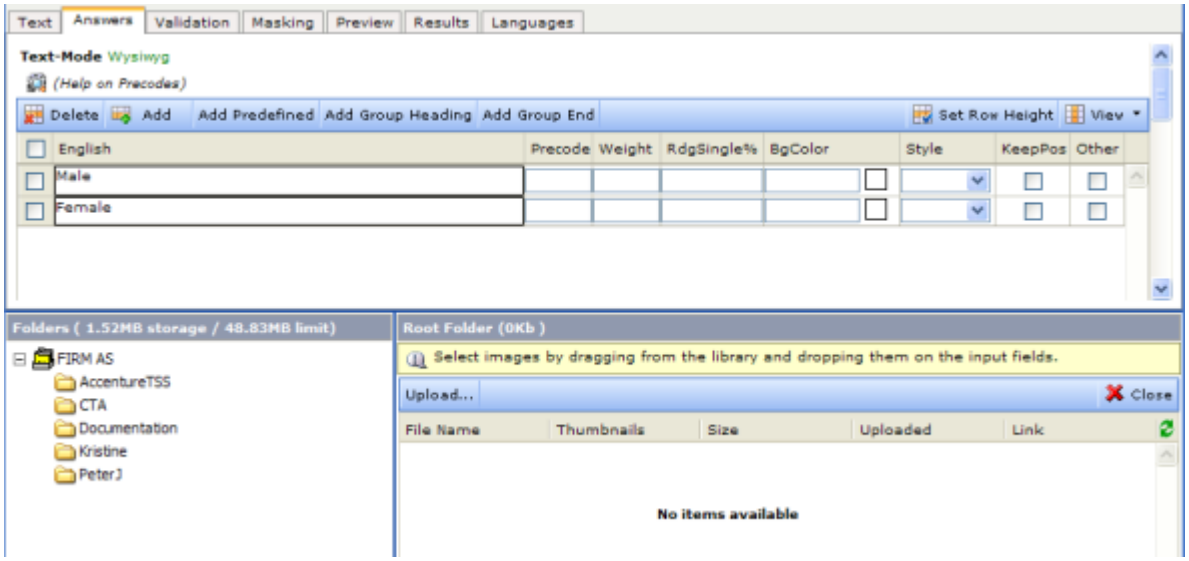


Figure 172 The question form with the File Library open below

4. In the folder tree to the left, browse to and open the folder in which the image/file is stored.
5. Click on the required image, drag it to the appropriate field, and drop it into position.

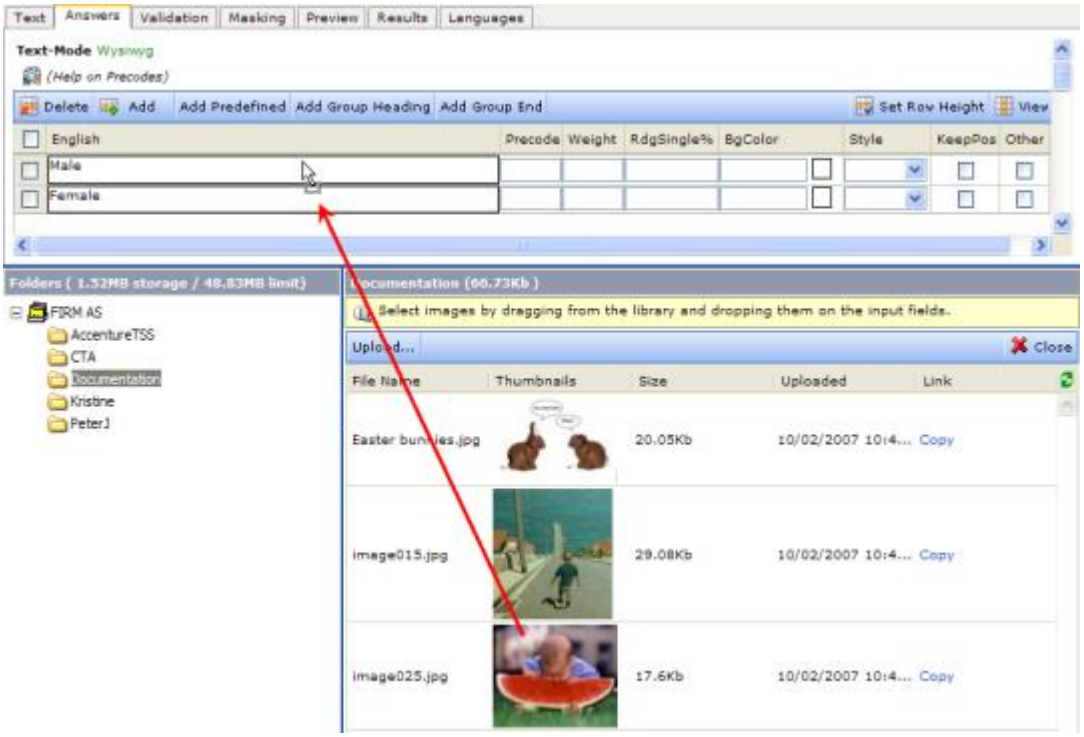


Figure 173 Dragging an image into the Answer field

6. Save the changes.

Note that you can also switch to HTML Source mode and type the URL to the image into the field manually as for the Text tab (see How to Include an Image in a Text Field in HTML Source Mode on page 165 for more information)

5.6.3. How to Add a Logo to a Theme

When you add an image to a page in your survey, the image will only be displayed on that specific page. However you may wish to have an image, for example your company logo, on every page of your survey, as shown below. To achieve this, you can add the image file to the theme that will be used for the survey.

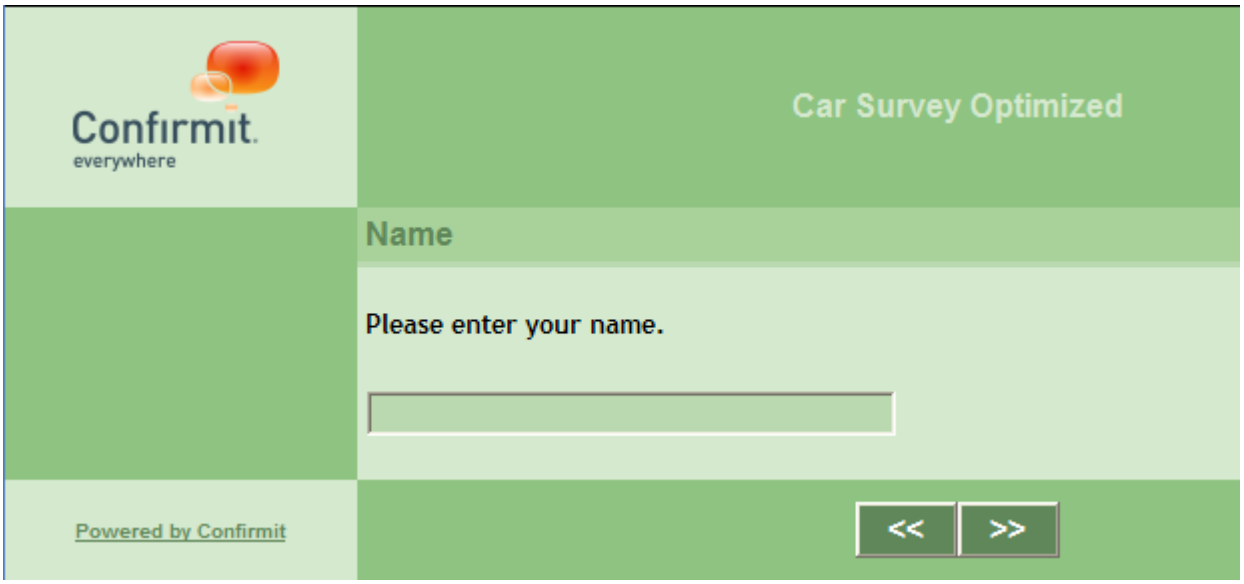


Figure 174 Example of a logo placed in a Theme such that it appears on every page of the survey

Proceed as follows:

1. To ensure the image will always be available, archive the image file in the File Library (see How to Upload Files to the File Library on page 159 for more information).
2. In the File Library folder, click the **View** link for the image you wish to add to the Theme.

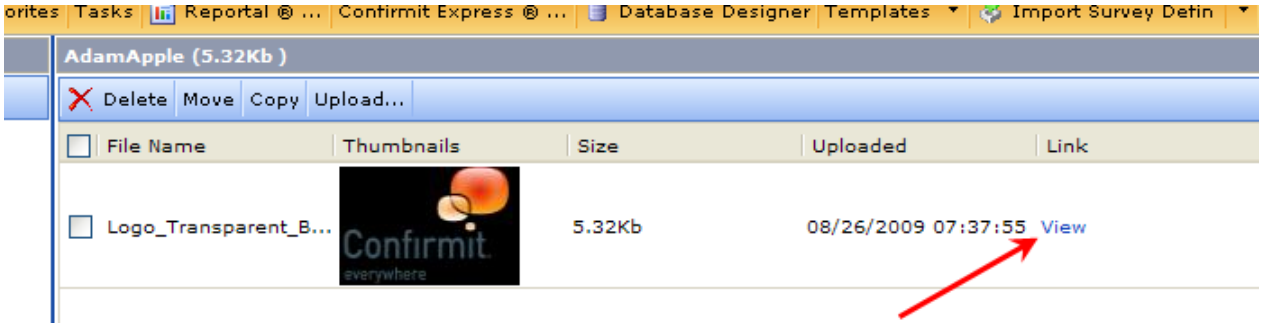


Figure 175 The View link in the File Library folder

This opens the Relative Link window.

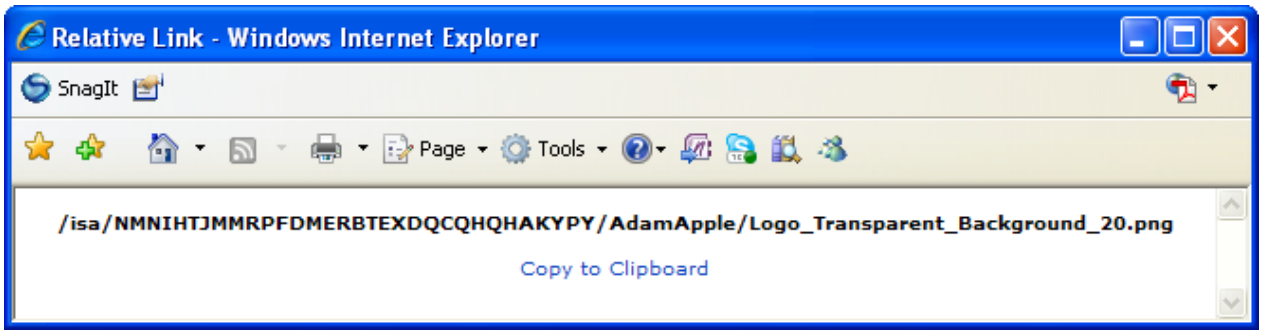


Figure 176 The Relative Link window showing the URL to the image file in the File Library

3. Click the **Copy to Clipboard** link to copy the URL to the clipboard.
4. Open the survey to which you wish to add the image file, and go to the Designer window.
5. In the Questionnaire Tree toolbox, scroll down to the theme you are using and double-click on it to open the Page Editor (see Themes on page 76 for more information).
6. Place the curser on the page where you wish to add the image (into the appropriate cell of the table), right-click, and select **Insert Image** from the menu.

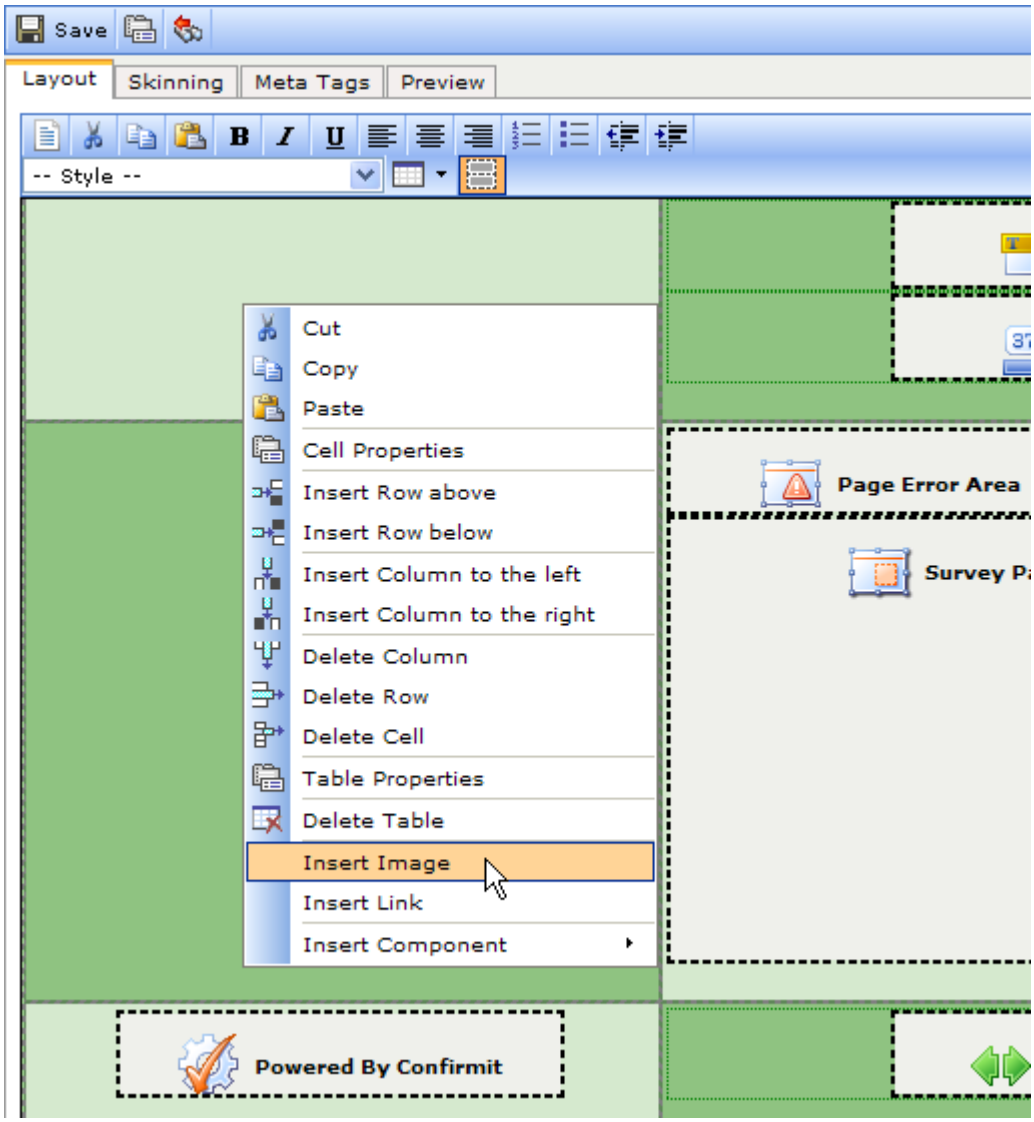


Figure 177 Selecting Insert Image

The Properties page opens.

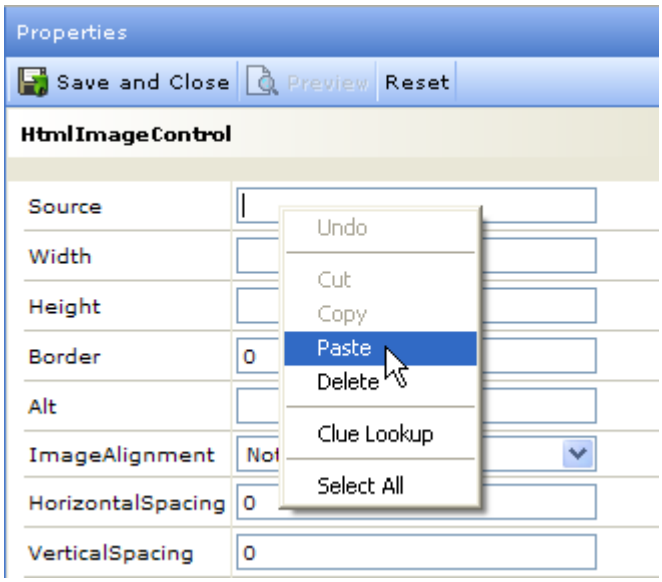


Figure 178 Pasting the URL into the Source field

7. Right-click into the Source field and select **Paste** to paste the URL into the field.
8. Type values into the Width, Height and Border fields as appropriate.

Note: If you are adding to the theme a file that is intended to give a "standardized" look to your surveys, for example your company logo, then you should ensure that the file is the correct size and resolution before you add it to the File Library.

9. Click **Save and Close** to add the image to the theme, then click Save in the Designer page to save the changes in the survey.
10. Test the survey to ensure the result is correct (see Quick Test on page 472 for more information).

Note that when the image is in a theme, you can open the properties page for the image by double-clicking on the image.

5.6.4. How to Resize and Delete an Image

To resize an image file:

1. In the text input field, click on the image in the field to select it.

   The resizing grips appear as shown in the figure below.

2. Click on a grip and drag it such that the image is resized as required.

   A dotted line indicates the frame of the image while the image is being resized.

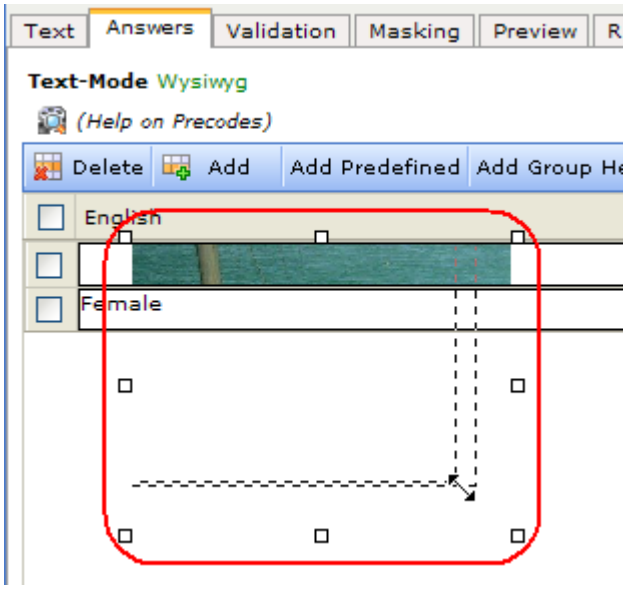


Figure 179 Resizing an image on the Answers tab

3. When the image is the desired size, release the grip and save the changes.

To delete an image/file from a field, click on the image to select it (resizing grips become visible) and press the **Delete** key on your keyboard.

5.7. Files in CAPI Surveys

Note: Confirmit CAPI is a chargeable Add-On.

If you wish to refer to images or other files in a Confirmit CAPI survey, the files must be stored in specifically named folders in the Confirmit File Library to ensure that the files are included in the survey during the synchronization process. The folder name must be either the survey number if the files are to be used only in this one survey, or "CAPICommon" if they are to be shared across several CAPI surveys. See the figure below for examples.

Note: The following characters are not allowed and must not be used in the folder names in the File Library: + % / \ ? # $ & * | : " < >.

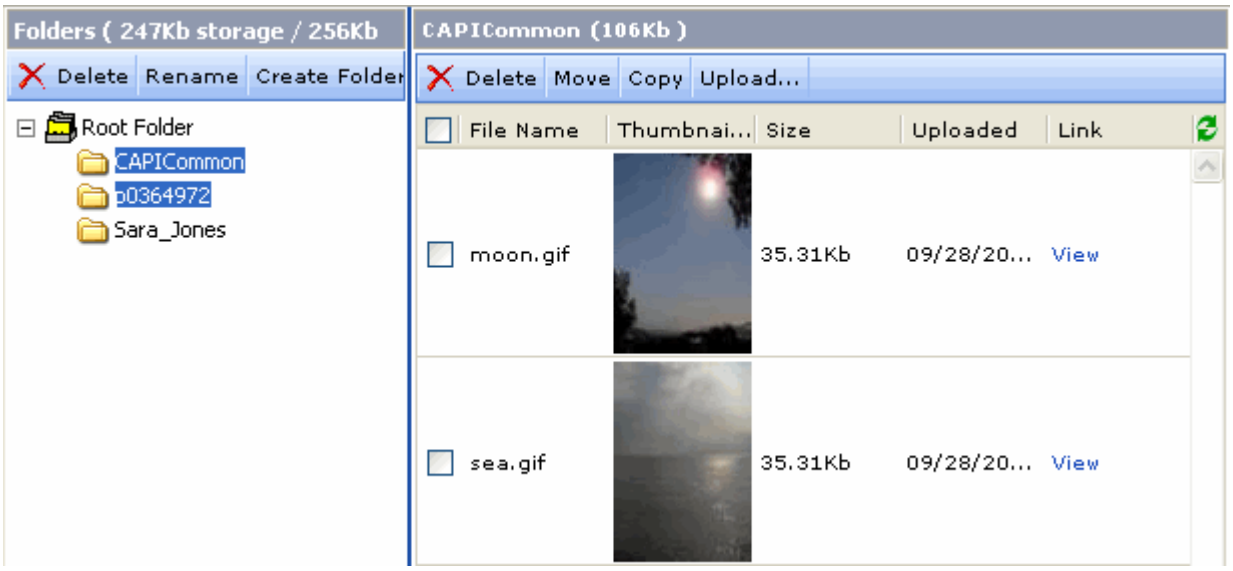


Figure 180 Files Used in CAPI Surveys

6. Survey Management

The Survey Management page and associated menu items enables you to set up your survey as required. The following sections describe each Survey Management area in more detail.

Note: The Standard user has a simplified Survey Management page (see Standard Users on page 184 for more information).

6.1. Overview

The Overview page for a survey provides you with information about the survey. This is the first page that opens when you create a new survey (see Creating a New Survey on page 202 for more information). To open the Overview page, go to the **Survey Management > Overview** menu command. The page opens at the General tab (see The General Tab on page 174 for more information).

The following sections describe the tabs on this page.

6.1.1. The General Tab

When you go to the **Survey Management > Overview** menu command, the Overview page opens at the General tab.

Note: Standard users have reduced Survey Management functionality (see Standard Users on page 184 for more information).

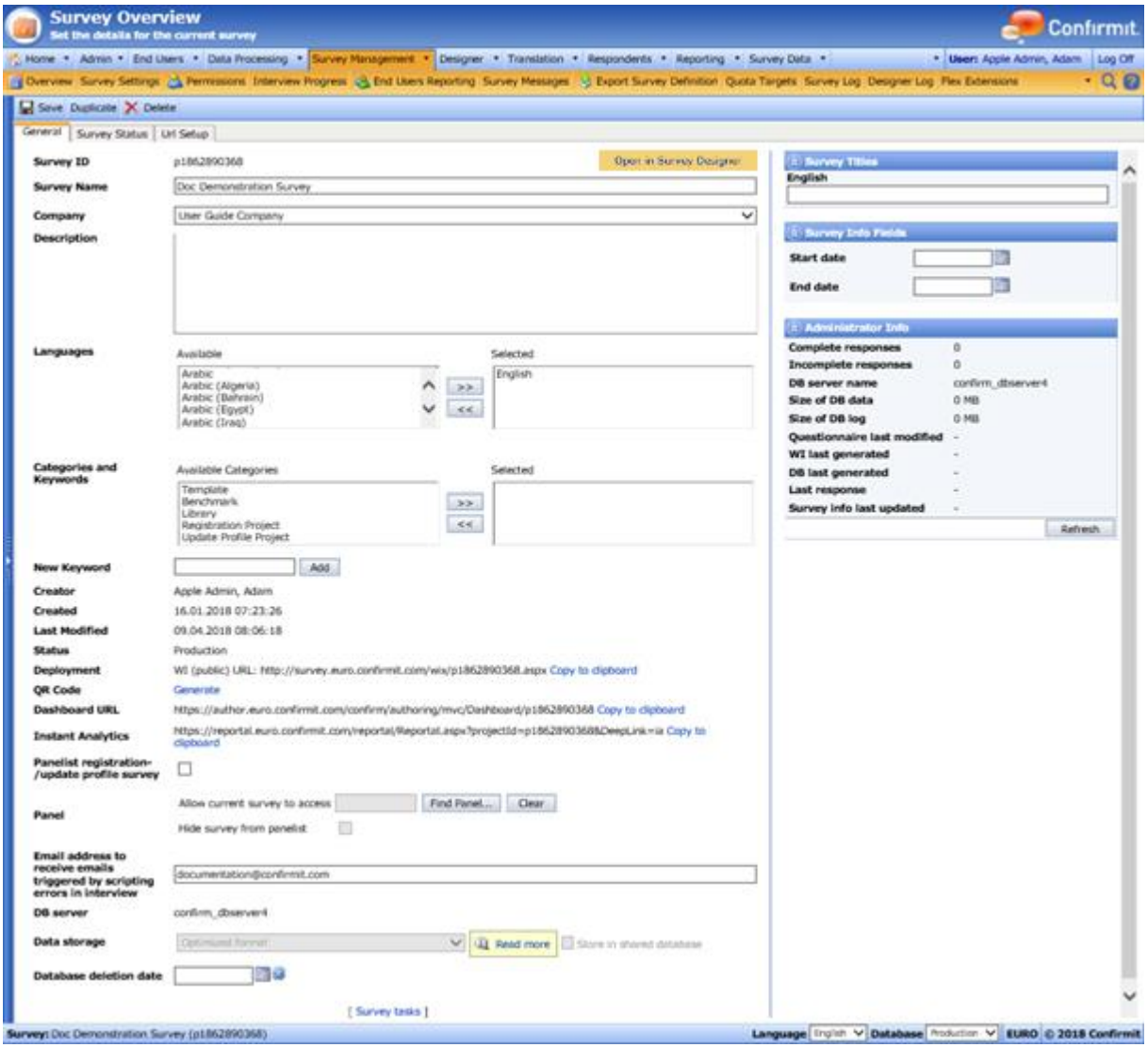


Figure 181 Example of the Survey Overview page, General tab

Note: If the survey you have selected is a Confirmit Express survey, you will also have the Convert to Survey Designer button in the toolbar. If you have opened the survey as an Approver, then the toolbar will also include the Approve Survey and Deny Survey buttons (see Confirmit Express on page 200 for more information).

The fields, links and other information presented on the General tab are described in the following pages.

A number of fields are displayed in the right column of the page. These are described in the following sub-sections.

Note: Click the Open in Survey Designer link to open Survey Designer in a new browser window and open the survey at the Survey Overview page. Refer to the separate Survey Designer User Guide for information on this application.

6.1.1.1. The General Tab Fields

The fields and other information on the General tab are as follows:

- **Survey ID –** system-generated unique identification number. This is created when the survey is created, and cannot be changed.

- **Survey name –** a title you choose for the survey. This will be the title of the browser window in a live WI survey, but it will be superseded by Survey Title if one is provided for the selected language (see The Survey Titles and Info Fields on page 178 for more information).

Note: If you are creating a CATI survey (see CATI on page 648 for more information) and you wish to create a duplicate version of the survey for testing or practice before you start collecting real data, you can add #Test to the survey name to automatically change the appearance of the interviewer UI. In Test mode the toolbars at the top and bottom of the screen are given a yellow background and the words 'TEST MODE' are included in the console window title.

- **Company –** your company's name. This will be added automatically by the system when the survey is created.
- **Description –** here you can enter a more detailed description of the survey, so it is more easily identifiable when you (or someone else) returns to it at a later date.
- **Languages –** here you can select the working language(s) of your survey. The *Available* field contains all the languages that are supported in Confirmit. The *Selected* field will contain the working languages of your survey. You highlight a language in the *Available* field and click the arrow button to add it to the *Selected* field. Once a language has been selected, you can edit the messages for that language to suit the particular survey (see How to Edit a Survey Message on page 191 for more information).
- **Categories and Keywords –** you can categorize surveys (give them tags) so you can then filter the survey list to find only surveys of particular categories. To filter, in the survey list toolbar click in the Survey Category selection field and select the category you are looking for, then click the **Search** button  towards the right end of the header bar. Three categories are predefined; Template, Library, and Benchmark, and any survey with no specific category allocated will be "Normal".

    - **Template -** The survey will be saved as a template. It will then be listed in the Select Template list that appears when you select "Make survey based on an existing template" whilst creating a survey. Note that a template cannot be used as a survey, it can only be used when creating a new survey (see How to Create a Survey Template on page 183 for more information).
    - **Library -** the surveys that are marked with category Library will usually be surveys that you wish to keep for later reference.
    - **Benchmark -** surveys given the Benchmark category will usually be surveys that you set up for reporting purposes in Reportal. Refer to the separate Reportal User Guide for further details.

Note: If you have the Professional Panel add-on, two additional Categories are available to you on the Survey Overview page. These allow you to categorize surveys that are "Registration Survey" (for panelists' initial registration to the panel) and "Update Profile Survey" (for existing panelists to update their profile).

- **New Keyword -** In addition to the predefined categories, you can add your own free text categories, for example "Demos", "E-SAT", "Brand recognition", etc. You will be able to use these categories when searching for surveys in all parts of the application (including Reportal).
- **Creator** - the name of the user who created the survey.
- **Created** - the date the survey was created.
- **Last Modified** - the date the survey was last edited.
- **Status –** the survey status (see The Survey Status Tab on page 181 for more information)
- **Deployment –** the survey type (Public/Limited/Pop-Up) Web Interview. The Open link to the survey is displayed next to the survey type, and this can be copied to your pc's clipboard so that it can be pasted into for example an email, a website etc.
- **QR Code -** click to generate a QR code for the survey. The QR code is a link to your survey. If it is printed, for example on receipts or posters, or embedded in presentations or advertisements, respondents can scan it using a QR reader, for example in a mobile app, to open the survey URL and respond to the survey. Click **Download** to create a .PNG file of the QR code and place a link to the file in the lower frame of the Confirmit window. You can then open the file or copy it to a suitable archive location.

- **Dashboard URL -** the Survey Dashboard provides information about a survey to users without them having into log in to Authoring. In this initial release, some basic statistics can be accessed through a touch device and through a standalone browser (see The Survey Dashboard on page 698 for more information).
- **Inline Survey Link -** the Inline Survey functionality allows you to embed your survey into any web page without having to use iFrames. This is the link to the survey, to be copied into the web page (see The Inline Survey Options on page 507 for more information).
- **External Test URL** - if the author has checked the Enable External Test option in the Launch Options dialog for the survey's test database, then this row will display the link to the test version of the survey (see Enabling External Test Access on page 530 for more information).
- **Test / Prod. WI in sync** - if the production and test databases are the same (both have the same "last modified" timestamp), then this line will read Yes. If the line reads No, then one of the databases has not been re-launched after changes have been made to the survey so the test and production databases are different. One of the databases will need to be re-launched.
- **Panelist registration / update profile survey** - check this box if the survey you are creating is to be used for panelist registration. Note that this box should only be checked for surveys used for panelists signing up for the panel or updating their profile. It must not be used for regular data collection surveys. If this box is checked for a survey, it will be registered in the survey log.
- **Panel - Allow current survey to access** - if the survey is to use a panel, browse to the panel here. Once a panel is selected, the "Hide survey from panelist" option (see below) and a "Go to panel" link become available. Click the link to open the panel in Confirmit.
- **Hide survey from panelist -** if a panel is selected in Panel above, this option becomes available. If this option is selected, the project will not be listed in the user's survey list when accessed from a portal.
- **Survey Router -** if the survey has been registered in a Survey Router group, the router group name will be displayed here as a link. Click the link to go to the group's Group Details overlay (see Group Details Overlay General Tab on page 393 for more information).
- **Enforce HTTPS in Advanced Reporting –** check this option to enforce HTTPS use in Advanced Reporting, accessing reports via Enduser interface, for this survey.
- **Email address to receive emails triggered by scripting errors in interview** - use this field to specify the email address to which you wish survey error notifications to be sent (see Email Address to Receive Emails Triggered by Scripting Errors in Interview on page 178 for more information).
- **Data Storage** - If you have administrator rights to this survey, and while the database has not yet been generated (launched), you can select the type of database that the survey is to use. The options are Legacy Format (the "old" format used until Confirmit 12.5), and Optimized Format (available from Confirmit 12.5) (see The Optimized Database Format on page 38 for more information).
- **Enable reusable database** - check this box to specify support for multiple surveys stored in a single database. This enhances performance for surveys and support for new features that will not be supported by legacy surveys.
- **Enable database encryption -** if your company has the required add-on, you can select this option to encrypt the production database. The same option is available on the Launch Survey page (see Enabling Database Encryption on page 531 for more information). Note that test databases are not encrypted, and it is not possible to change the encryption state of a previously launched database; once a database is launched, if you wish to change the encryption state you must create a new database.
- **Change tracking retention hours -** Change tracking is enabled for all databases on launch because the functionality is required to update the hub variants used for the metrics shown in survey list/survey overview. This property allows you to specify how long the system will keep logged changes, for example 48 hours (the default value). If you have a task that runs an incremental update every hour based on the change tracking log (as for example hub loader or text analytics task does), you could reduce the setting to for example two hours to save space. Type the required number of hours into the field.
- **Database deletion date -** to assist you with complying with GDPR (the General Data Protection Regulations), you can set a date for when the database and data records (not the survey definition - this will be kept) will be deleted. By setting a Database deletion date, the system will automatically delete the survey database and all data records on the next recurrence of the archiving task after the specified date is reached. Note that the deletion of the data is irreversible. The survey owner will be notified before the deletion takes place.

If any Recurring tasks are set up for the survey, a **Recurring tasks** link will be displayed at the bottom of this page.

The **Survey tasks** link will be displayed to users with Administrate permissions to a survey. The link gives quick access to the Task Management page that will contain all tasks for the current survey.

Note: Only users with survey administrator access or those with access to a Designer can save changes on the Survey Overview page.

6.1.1.2. Email Address to Receive Emails Triggered by Scripting Errors in Interview

Use this field to specify the email address to which you wish survey error notifications to be sent. If an error should occur in the survey, the respondent will receive a general error message in the language he/she has selected for the survey.

The person to whom the email is sent will receive a detailed description of the error and its whereabouts, for example:

```
** Error info **

Date      : Fri Apr 28 01:06:58 UTC+0200 2000

Project   : pXXXXXXX (The Name of the Project)

Respondent: 1

 ** Error description **

Problem encountered while processing question 'q22':

Error in mask:

   f("q21").add("99")

Object doesn't support this property or method
```

The error message specifies the survey ID, the title of the survey, the question, and the error, that may be in the script, code mask, condition or expressions. In Test mode, this specified error message will also be displayed in the survey, next to the general error message.

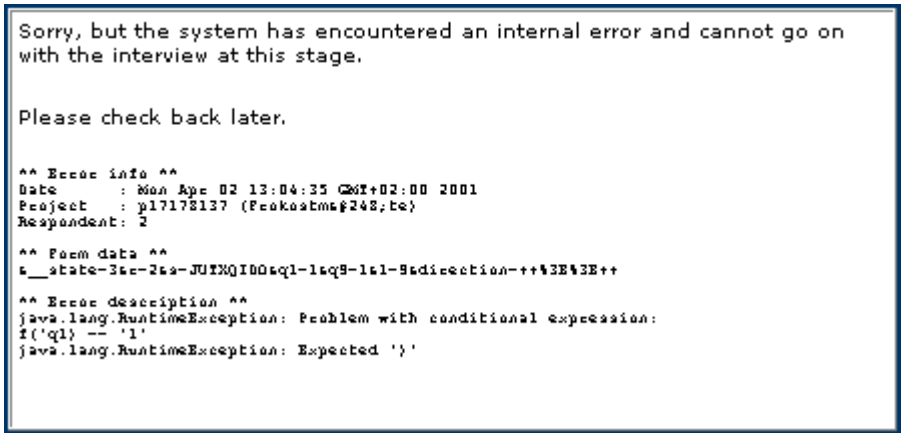


Figure 182 Example of the Test Mode error message

6.1.1.3. The Survey Titles and Info Fields

These fields allow you to edit the survey titles in the various survey languages, and to set the survey start and end dates.



Figure 183 The Survey Title and Info Fields

- **Survey Title** - The title of the survey in the various survey languages. When a Survey Title is supplied for a language, and that language is selected by the respondent, then the title will be displayed in the Survey Name visual component. Survey Title takes priority over Survey Name (see The General Tab on page 174 for more information) when Survey Title is provided for a language, but if no Survey Title is provided for a language then the Survey Name will be used.
- **Start date** - Information field stating the start date of a survey.
- **End date** - Information field stating the end date of a survey. Note that the survey will not close automatically on this date. You must close the survey manually in Survey Status (see The Survey Status Tab on page 181 for more information).

6.1.1.4. The Administrator Info Field

This field displays read-only information on the current state of the survey and data.

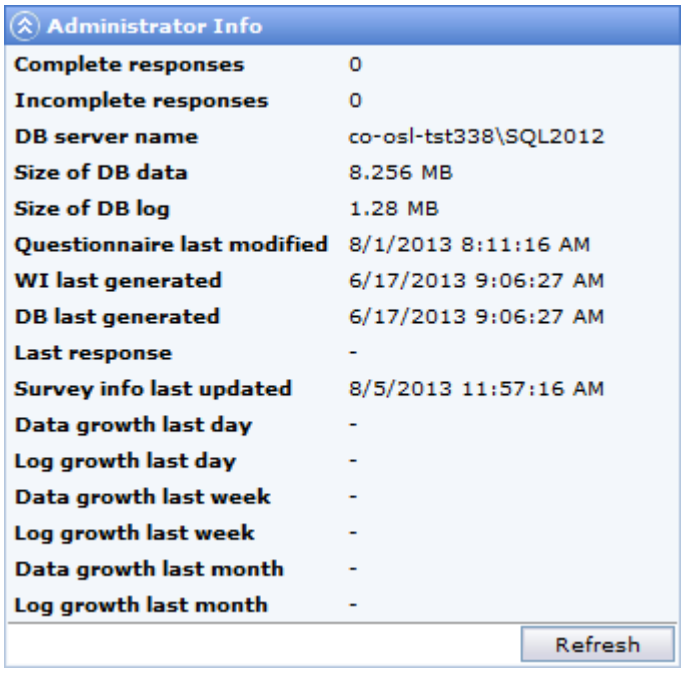


Figure 184 The Administrator Info details

The information provided is as follows:

- **Complete responses** - Number of complete responses in the survey.

- **Incomplete responses** - Number of incomplete responses in the survey.
- **DB server name -** the name of the server on which the database is stored.
- **Size of DB data** - Current size of database data.
- **Size of DB log** - Current size of database log.
- **Questionnaire last modified** - Last time the questionnaire was modified.
- **WI last generated** - Last time the web interview was generated.
- **DB last generated** - Last time the database was generated.
- **Last response** - Last time a respondent accessed an element in the survey.
- **Survey info last updated** - The last time all the survey admin information fields were updated.
- **Data growth last day** - Growth in database data size during the last 24-hour period.
- **Log growth last day** - Growth in database log size during the last 24-hour period.
- **Data growth last week** - Growth in database data during the last week (7 days).
- **Log growth last week** - Growth in database log size during the last week (7 days).
- **Data growth last month** - Growth in database data size during the last month (same day last month).
- **Log growth last month** - Growth in database log size during the last month (same day last month).

6.1.1.5. The Check Growth Field

This field enables you to check the size and growth of your survey data.

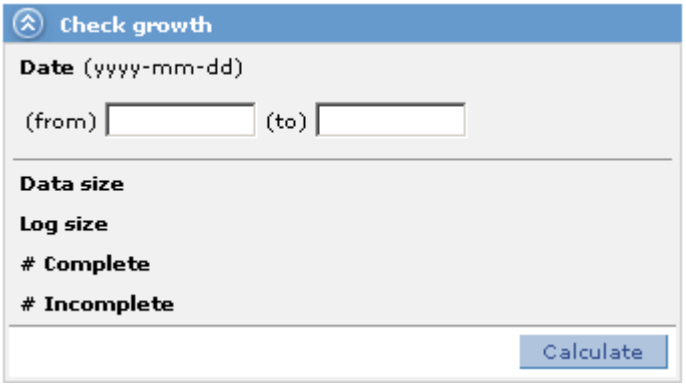


Figure 185 The Check Growth details

The information provided is as follows:

- **From date** - Use to specify the from date when checking the growth within a specified range.
- **To date** - Use to specify the to date when checking the growth within a specified range.
- **Data size** - The calculated database data growth from the range specified above.
- **Log size** - The calculated database log growth from the range specified above.
- **# Complete** - The calculated growth in complete responses from the range specified above.
- **# Incomplete** - The calculated growth in incomplete responses from the range specified above.
- **Calculate** - Perform the calculation and display the results on the page.

6.1.2. The Survey Status Tab

Use this tab to set the survey status.

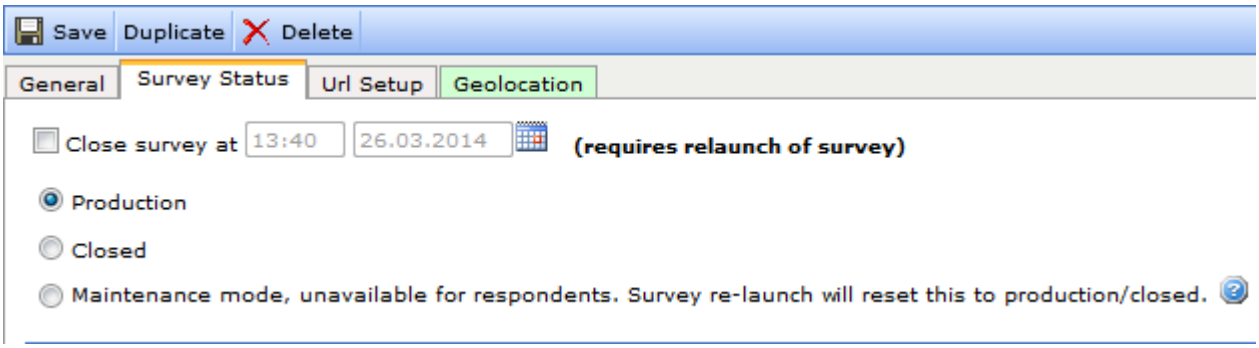


Figure 186 The Survey Status tab

The tab has four options:

- **Close survey at -** you can set the survey to close at a specific time on a specific date. The "default" date and time will be one month from when you opened this tab. Adjust as necessary then re-launch the survey to activate the setting. If the survey is live then remember to ensure you update the existing database, not create a new database! Note that the date and time are "local" for the server on which you are running Authoring.
- **Production -** the survey is running.
- **Closed -** the survey is closed. Respondents will not be able to enter the survey, and a message, for example the one shown below, will be displayed to them if they attempt to do so. The message that is displayed can be edited in the Survey Messages page (see Survey Messages on page 190 for more information).

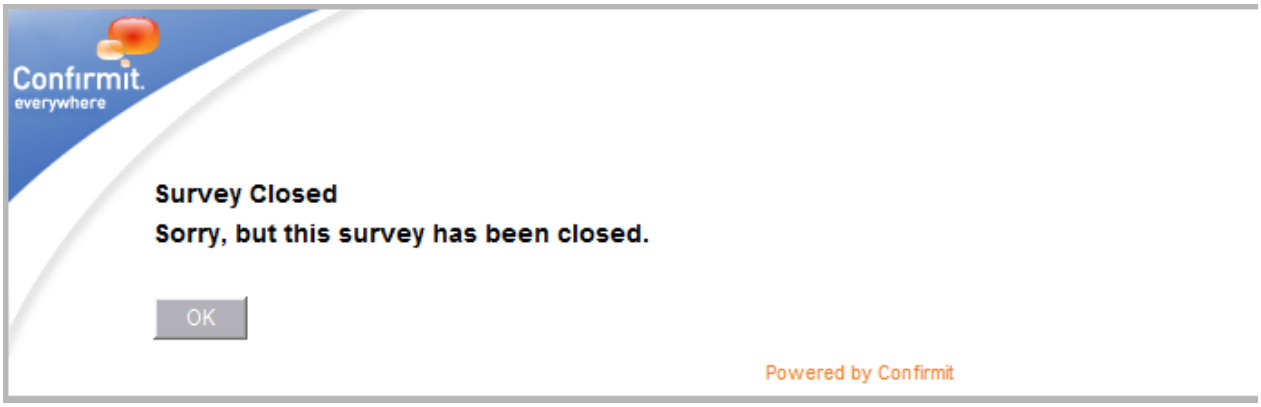


Figure 187 Example of a "Survey Closed" message

- **Maintenance Mode -** select this mode to temporarily close the survey to respondents and display a "Survey under maintenance" message.

  Imagine the situation; you have just sent your survey out to a huge number of respondents, and you notice it contains a glaring error. You have to correct the error before too many respondents see it, but you do not wish to close the survey as any respondents who attempt to enter it while it is closed will not return. Set the survey in Maintenance Mode while you are correcting the error. The message that is displayed can be edited in the Survey Messages page (see Survey Messages on page 190 for more information). Note that if/when the survey is re-launched, the survey status will automatically be returned to it's previous state; Production or Closed.

You can reopen the survey at any time as necessary. This will not have any impact on the response data in the database, unless you recompile the survey and choose *Create new database.* This action will delete all response data.

Note: When a survey is closed, any recurring tasks that are still running will be disabled (see The Task Properties Recurrence Tab on page 60 for more information). If the survey is later re-opened and the user wishes to re-start the tasks, the user must go to the tasks and re-start them as necessary. If the survey is set to Maintenance Mode, any recurring tasks will continue to run.

6.1.3. The URL Setup Tab

Use the options on this tab to specify where the respondents are sent (which website) when they have completed the survey.

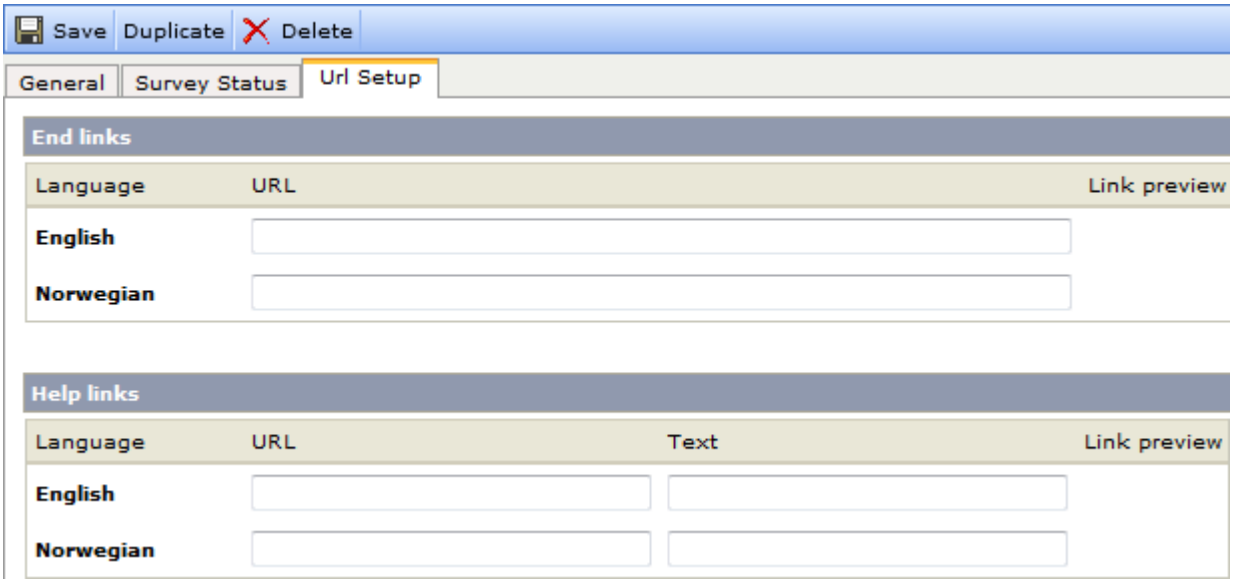


Figure 188 The URL Setup tab

The fields and check-boxes are as follows:

- **End links -** enter the URL of the website you wish the respondents to be sent to after they have finished the survey. You can add one URL for each survey language, so you can send the respondents to, for example, websites in their local languages, or the website of your company's branch office in their country. The End link must be defined before you compile the survey database.
- **Help links -** enter a URL to a website you wish to use either for additional information or for other purposes in the questionnaire. If a respondent clicks on a link in a survey, a new browser window will open. Again, you can add one URL for each survey language.
- **Text -** this field controls the appearance of the Help link. You may substitute the address with another text.
- **Link preview** - this column displays a preview of the link.

6.1.4. Duplicating a Survey

There may come a time when you need to create a questionnaire that is very similar to one that already exists. In this case, the quickest route to success may well be to make a duplicate copy of the existing questionnaire, then edit the copy. To do this:

- In the Overview page, click the **Duplicate** button in the page's toolbar.

A message appears informing you that the duplication is in progress. On completion, a copy of the original survey is created and opened. The copy is given the name "Copy of [original survey name] (new survey number)".

The system duplicates the entire questionnaire routing, but not the response data from the original survey. You can now rename and modify the questionnaire.

6.1.5. How to Create a Survey Template

If professional users in your company regularly need to create surveys that are fairly similar, you can make a survey template. This template will then be available to those users who have been given access to it (see Permissions on page 185 for more information) to use when creating surveys, thus potentially saving considerable time and effort. The survey template can be as simple or as complicated as you wish, though you should bear in mind that it is probably better to include too much in the template than too little - it will be a lot quicker and easier for future survey creators to delete irrelevant questions and nodes than create additional items.

To create a survey template:

1. Create a normal survey (see Creating a New Survey on page 202 for more information) or duplicate an existing suitable survey (see Duplicating a Survey on page 182 for more information).
2. Add and edit any required questions and nodes and set everything up as needed.
3. In the **Survey Management > Overview** page, **General** tab, go to the Categories and Keywords field and select the **Template** Category.

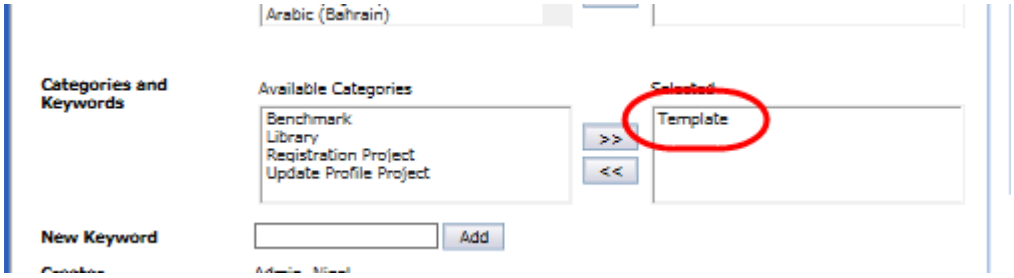


Figure 189 Selecting the Template category

4. Save the survey.

The survey will be saved as a template. It will now be listed in the Select Template list that appears when you select “Make survey based on an existing template” while creating a survey (see Creating a New Survey on page 202 for more information). Note that once a survey is categorized as a template it will no longer be listed in the normal Survey List, so it cannot later be used as a survey in its own right; it can only be used as a template to create new surveys. So if you wish to base the template on an existing survey, you should first create a duplicate of that survey and then categorize the duplicate as the Template.

6.1.6. Deleting a Survey

To delete a survey:

1. Go to the **Survey Management > Overview** menu command.

   The Overview page opens.

2. Click the **Delete** button.

   A confirmation message is displayed.

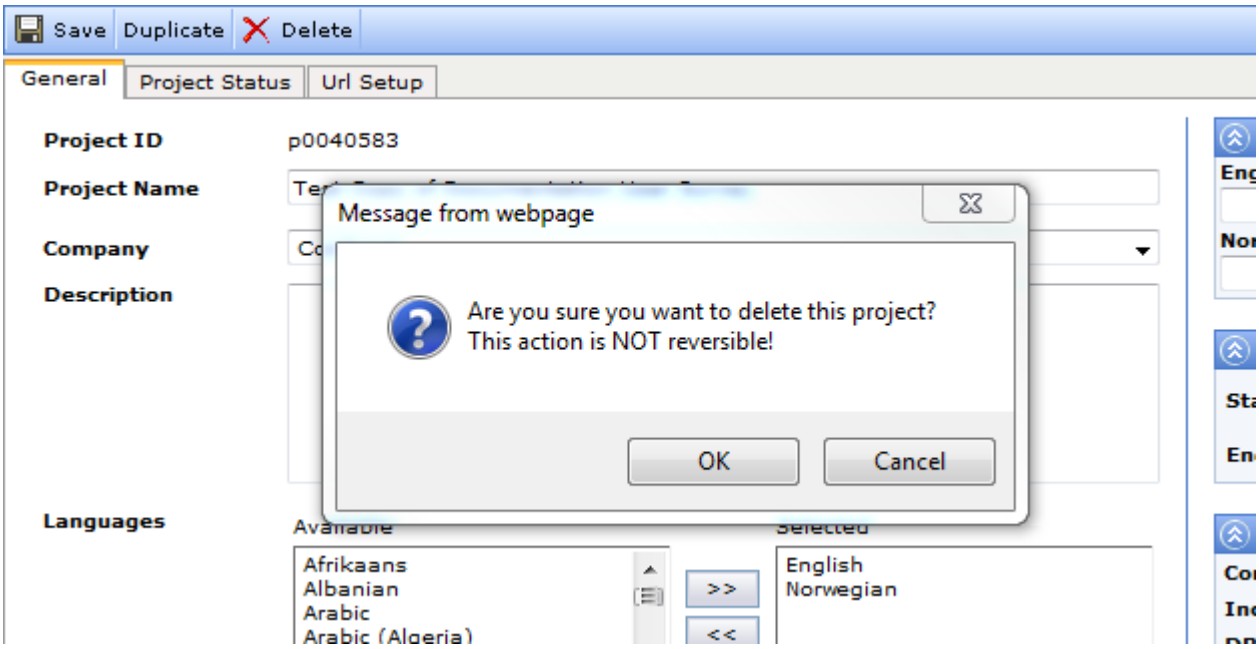


Figure 190 Deleting a survey

3. Click **OK** to delete the survey, **Cancel** to abort the process.

Note: This action cannot be reversed. Once you click OK in the confirmation box, the survey will be deleted and cannot be "undeleted".

Note: If you delete a survey in Authoring, any Reportal report that uses the survey as it's only data-source will also be deleted.

6.1.7. Recurring Tasks

If one or more recurring tasks are defined in a survey (published reports, emailing, etc.), a link leading to Task Management will be displayed. The number of recurring tasks existing in the survey will be stated.

6.1.8. Standard Users

Standard users have reduced Survey Management functionality, and see the Survey Details tab instead of the normal General tab.

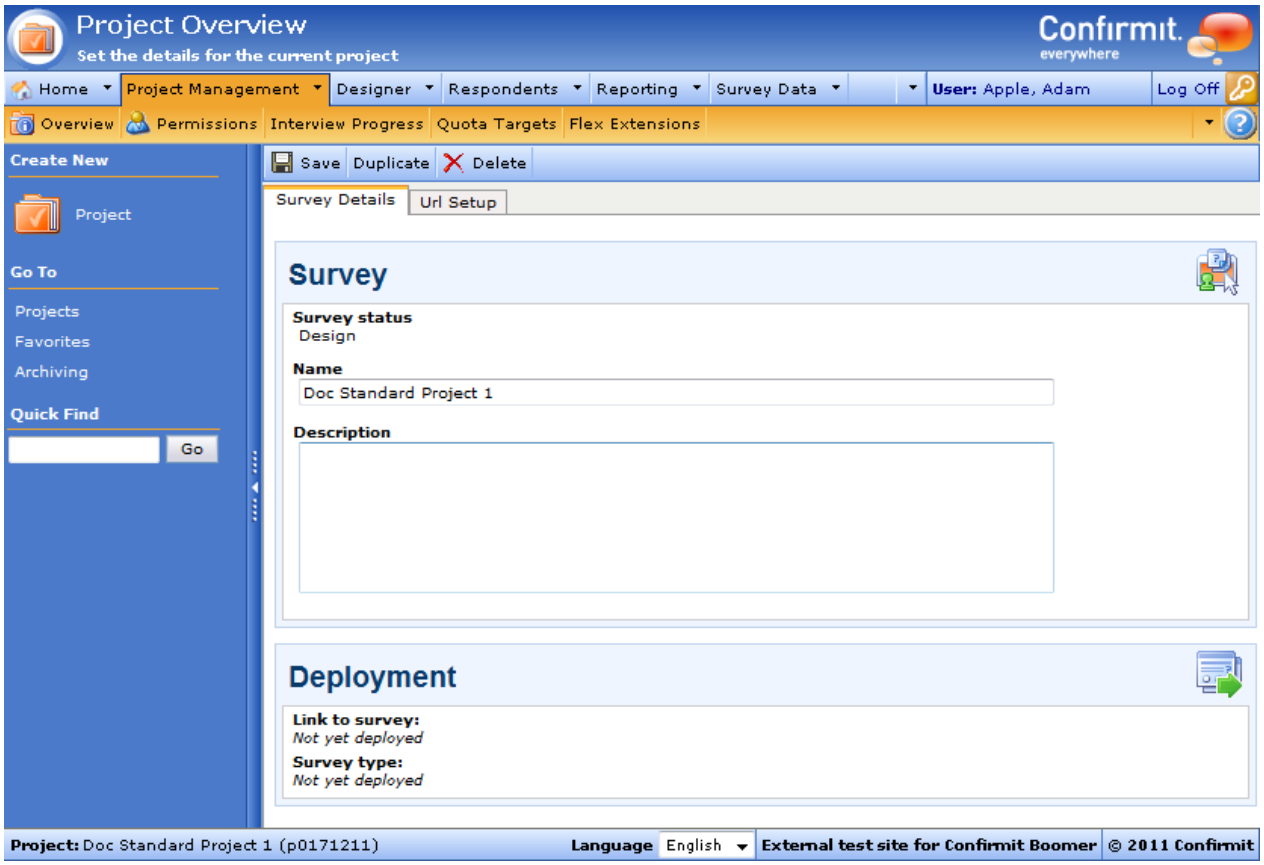


Figure 191 Example of the Survey Overview page for a Standard user

The Survey Details tab allows the Standard user to change the name of the survey as required, and add a description. The URL Setup tab is the same as that available to Professional users (see The URL Setup Tab on page 182 for more information). On this page you can also duplicate the survey (see Duplicating a Survey on page 182 for more information), and delete it (see Deleting a Survey on page 183 for more information).

Note that surveys created by Standard users will normally only have one survey language. A Multilingual permission is available as a chargeable extra for Standard users, and the language selection field on this tab will only be available if this permission is activated. The Language drop-down in the lower frame of the window will then also be available.

The procedure for launching a survey as a Standard user is different from that for a Professional user, (see Survey Deployment by a Standard User on page 535 for more information). Once the survey has been launched, the Survey Status field will be editable.

6.2. Permissions

For all surveys (survey templates are included here), the user who creates the survey is the survey administrator and owner, and a survey is initially invisible to all other Confirmit users. All Confirmit users in your organization will be listed in the Permissions page, and the survey administrator can give other users permission to view the new survey.

Note: Standard users cannot add or remove other users, and the types of permissions they can allocate are restricted.

Go to **Survey Management > Permissions** to open the page shown below.

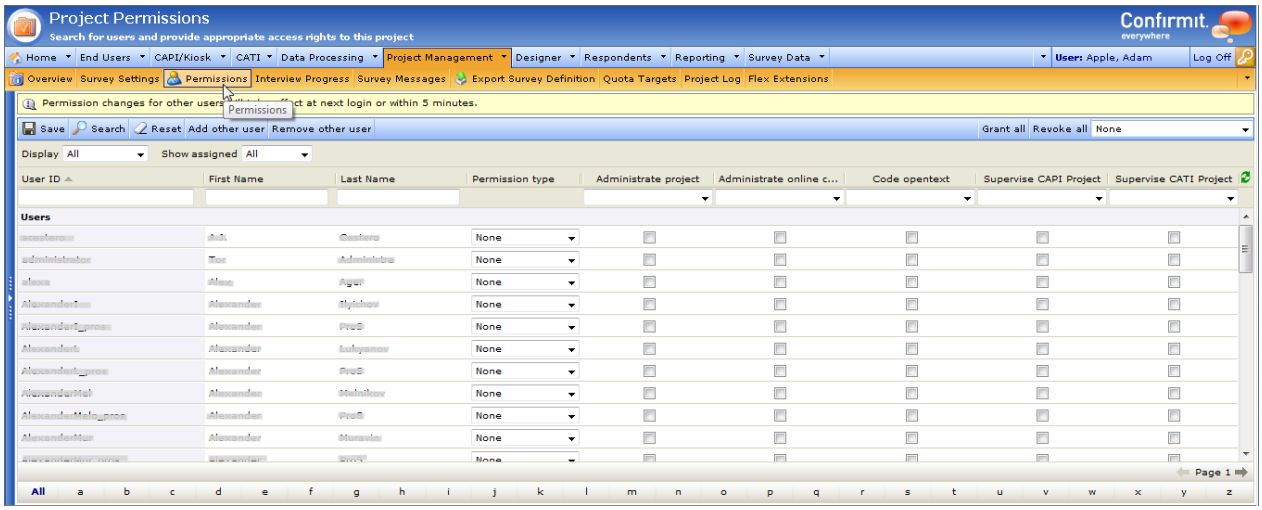


Figure 192 Example of the Permissions page

The buttons and columns are as follows:

- **Add other user –** click to open a dialog that allows you to add users to the list.
- **Remove other user -** click to open a dialog that allows you to remove users that have previously been added.
- **Grant all -** select a permission from the drop-down beside this button and click the button to give that permission to all the currently listed users. Note that if you do not wish to give the selected permission to all users in your company then you must first conduct a search such that only the appropriate users are listed on the page.
- **Revoke all -** select a permission from the drop-down beside this button and click the button to remove that permission from all the currently listed users. Note that if you do not wish to remove the selected permission from all users in your company then you must first conduct a search such that only the appropriate users are listed on the page.
- **User ID** - the user id of the user (if entered in user settings in Confirmit) is listed in this column.
- **Last Name / First Name** - the registered name of the user. This can be changed by the user in the **Home > User > Settings** page.
- **Permission type -** click the down-arrow beside a user's field to open a drop-down list of the permissions, then select the appropriate permission for that user. The options are:
    - **None -** the user does not have access to the survey.
    - **Read** - the user has only Read permission, i.e. he/she can view the questionnaire and associated reports but is not allowed to add new or delete existing elements in them.
    - **Write** - the user has Write permission, i.e. he/she is allowed to add questions to the questionnaire and reports.
    - **Delete** - the user has Delete permission, i.e. he/she is allowed to work on the questionnaire and reports, and is allowed to delete objects in them.
- **Administrate project** - The user is the administrator and owner of the survey. He/she may alter the questionnaire, set the survey live, check response status, etc., as well as delete the entire survey This is usually the person who initiates the survey.
- **Administrate Online coding** - [not Standard user] The user has permission to administer the Opentext coders for the current survey. Note that when the survey is created, this permission will be given automatically to the survey creator.
- **Code Opentext** - [not Standard user] The user has permission to code open-ended questions in the current survey (see The Online Coding Tool on page 658 for more information).

- **Supervise CAPI Project** - [not Standard user] the user is a CAPI Supervisor (see The CAPI/Kiosk Options Tab on page 515 for more information). See also the CAPI User Guide.
- **Supervise CATI Project** - [not Standard user] the user is a CATI Supervisor (see CATI on page 648 for more information). See also the CATI Supervisor's Manual.

Note: CATI, CAPI and Online Coding are all add-ons. The columns will only be visible in the tab if your company has purchased the appropriate licenses.

Other users can be added to the survey by the survey administrator. See the following section.

SaaS only:
Personnel at Confirmit ASA may be granted access for support purposes.

The Permissions page lists a maximum of 50 users on the current page; click the **next/previous Page** buttons in the lower-right corner of the page to move between pages. Click a letter-button (along the lower edge of the page) to list only those users who's User ID starts with that letter. The list can be sorted on the User ID, First name and Last name columns; click the appropriate column header to toggle the sort order up or down on that column.

6.2.1. How to Add Users

Note: Standard users cannot add or remove other users.

Initially, only users and groups within your organization are listed on the Permissions tab. However, more users may be added. To add users, you must supply Confirmit with the correct user keys for these users. Typically, an external user will send you his or her user key by email.

1. Copy this key to your clipboard, then click the **Add other users** button in the toolbar at the bottom of the Survey Permissions page.

   The Add other users overlay opens.

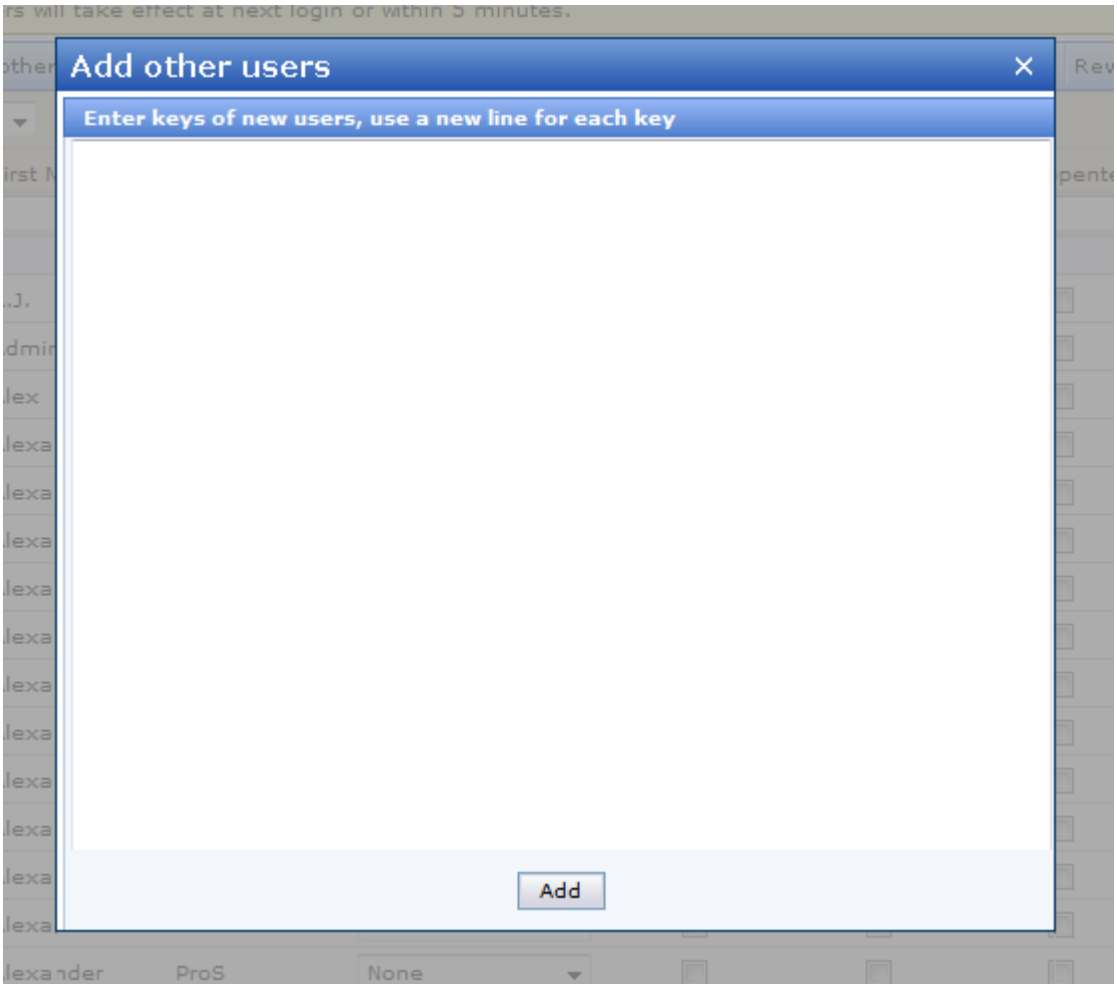


Figure 193 The User Key Entry window

2. Paste the key into the overlay window.

Note: Make sure you do not have any space after the last character in the user key.

3. Click **Add**.

   The overlay closes and you are returned to the Permissions tab. The newly added user will be listed in the **Other users** field. You can now give the new user the appropriate permissions.

To remove a user from the Other Users field, click on the **Remove users** link and then choose the users you wish to remove.

6.3. Interview Progress

The **Survey Management > Interview Progress** overlay provides up-to-date information on the current state of the survey with regards to the total number of respondents, the number of completes, incompletes, screened, quota fulls, and errors etc. The figure below shows an example of the interview progress overlay for a survey's test database.

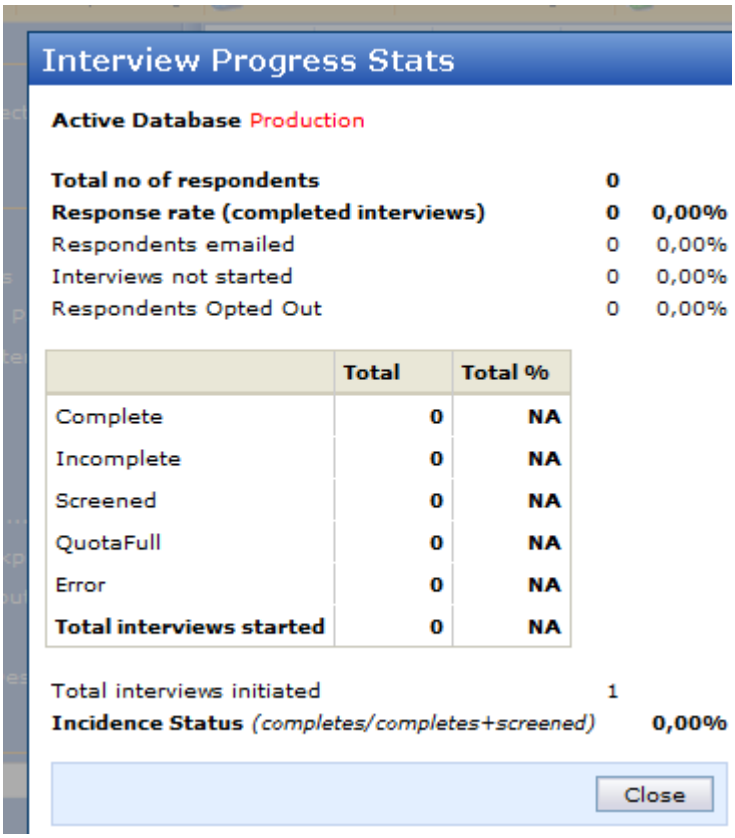


Figure 194 Example of an Interview Progress overlay

- **Total no of respondents –** for open surveys, this is the number of respondents who have accessed the interview. For limited surveys, this is the total number of respondents who have been uploaded to the survey.
- **Response rate –** the ratio of the number of completed interviews against the number of respondents invited to participate, presented as a percentage.
- **Respondents emailed –** the number of invitation emails that have been sent to respondents.
- **Interviews not started** – the number of respondents who have been emailed but who have not yet accessed the interview.
- **Complete –** the total number of interviews that have been completed.
- **Incomplete –** the number of respondents who have accessed the interview but who have not yet completed it. This does not include respondents who have been screened, who have been denied access due to the quota being full, or who have been closed out due to an error.
- **Screened –** the number of interviews where the respondent has been screened out due to constraints defined in the interview (for example the respondent's age).
- **Quota full –** the number of respondents that have been denied access to the survey due to the quota being full.
- **Error –** the number of interviews that have been stopped due to an error in the survey.
- **Total interviews initiated** - this field is the count of respondents who have received the first page of the interview irrespective of whether or not the page has been submitted. The field will only appear if the survey has the "Create database row only after first page submission" setting in the Web Options tab enabled (see The Web Options Tab Properties on page 504 for more information), and there is at least one respondent who falls into this category.

- **Incidence status –** indicates the percentage of respondents who were willing to complete the survey and who were actually qualified to do so. Incidence (the “strike rate”) is the proportion of respondents contacted in a survey who qualify to complete it.

6.4. Survey Messages

Confirmit contains a large number of texts and messages of different types; for example the message that appears when a respondent forgets to answer a required question, the message that is displayed to a respondent when a survey is closed, the text displayed on the **Cancel** button etc. These texts and messages are already translated into a number of "standard" languages (see Standard Languages on page 193 for more information), and you can specify that any of these languages are to be used by a survey (see The General Tab on page 174 for more information). However you may wish to have the messages displayed in a language that Confirmit does not provide as standard. Or perhaps you wish to change some of the texts and messages to suit a particular survey or dialect.

Confirmit provides three levels of "message editing" functionality:

- **Site-wide -** available to the Site Administrator via the **Admin > Languages and Messages > Survey Messages** menu command. This level is described in the Confirmit Administrator Manual.
- **Company level -** available to the Company administrator via the **Home** menu command (see The Company Submenu on page 139 for more information). Editing the messages is described below, and this level is also described in the Confirmit Administrator Manual.
- **Survey level -** available to the survey supervisor via the **Survey Management > Survey Messages** menu command. Editing the messages is described below.

Note: Messages edited at the Survey level override any edited at the Company or Site level.

The Survey Messages form is as shown below.

Important
This Functionality is only supported in Microsoft Internet Explorer 11.

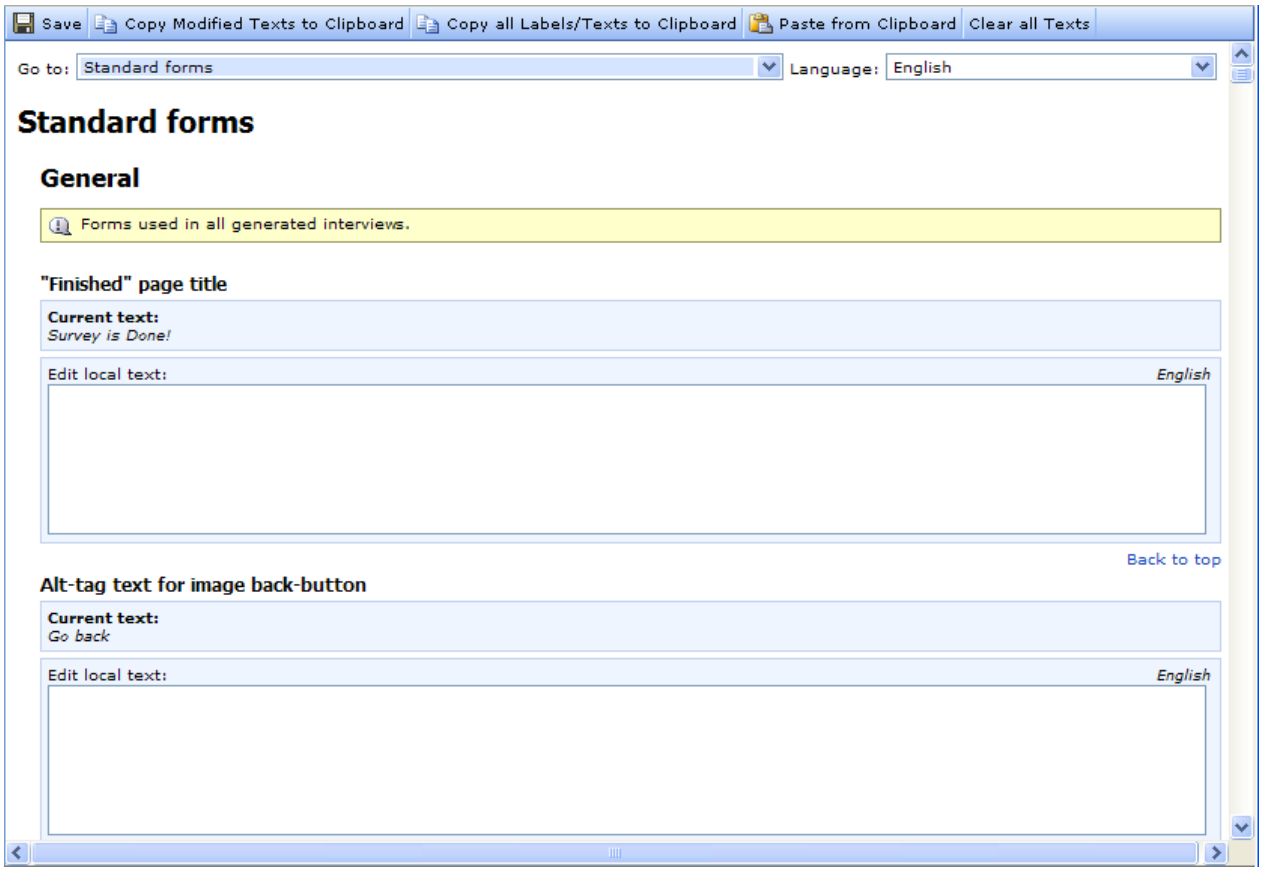


Figure 195 The Survey Messages form

The font family, size, color etc. used to display the survey messages are controlled via the HTML Styles. To adjust the font properties for the messages, in the Questionnaire Tree toolbox go to the **Survey Layout > Html Styles** folder. Note that the names of the styles that control the various messages (error messages, texts etc.) in your particular survey may vary depending on the theme that has been selected for the survey. Some experimentation may therefore be required to find the actual style that controls a specific message. Double-click on a style to open its Properties page, and here you can make the desired changes (see Working on an HTML Style on page 102 for more information).

Note: If a survey containing edited message texts is duplicated, the edited message texts will be included in the new survey.

6.4.1. How to Edit a Survey Message

To edit a survey message:

1. Open the survey you wish to work with and go to the **Survey Management > Survey Messages** menu command.

   The Survey Specific Survey Messages form opens.

2. To find a particular message, click the down-arrow beside the **Go to** field and browse to the required message.

   The messages are listed in logical groups; for example Standard - General, Standard - Login, Error - Numeric, etc.

3. If the survey is available in several languages, select the message language you wish to edit.

For example, if the survey is available in English and French, you can edit just the messages that will appear for English-language surveys, just the messages that will appear for French-language surveys, or both.

4. Edit the message text as appropriate.

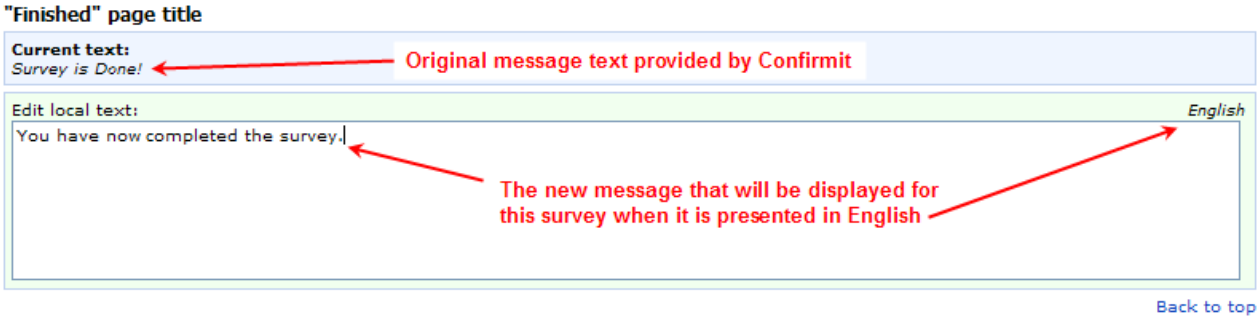


Figure 196 Editing a message text

5. Click **Save** to save the changes.

The font family, size, color etc. used to display the survey messages are controlled via the HTML Styles. To adjust the font properties for the messages, in the Questionnaire Tree toolbox go to the **Survey Layout > Html Styles** folder. Note that the names of the styles that control the various messages (error messages, texts etc.) in your particular survey may vary depending on the theme that has been selected for the survey. Some experimentation may therefore be required to find the actual style that controls a specific message. Double-click on a style to open its Properties page, and here you can make the desired changes (see Working on an HTML Style on page 102 for more information).

If/when the appropriate situation arises, your new message text will now be displayed to the respondent instead of the original text supplied by Confirmit.

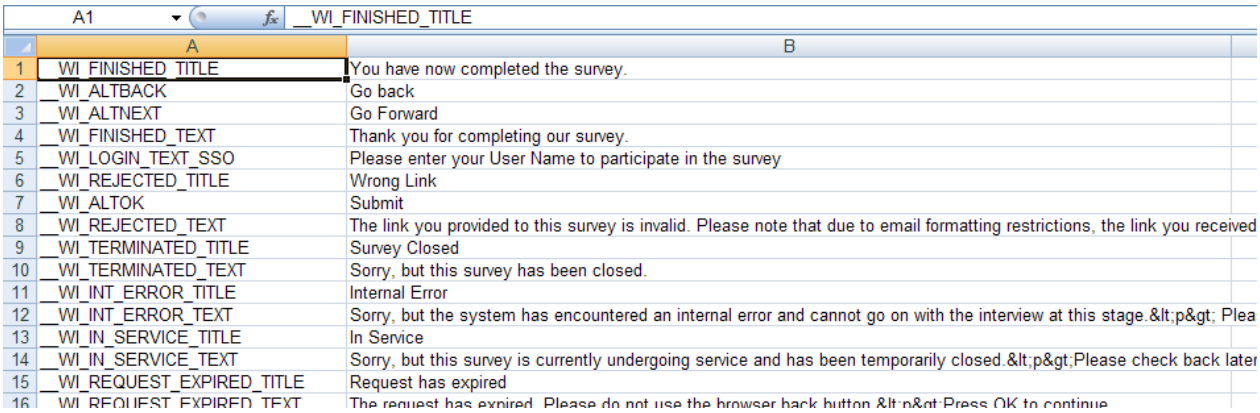
Note: If the survey is duplicated, any edited message texts will be included in the new survey.

6.4.2. Copying Survey Messages to your Clipboard

If you wish to edit a large number of survey messages, you may find it easier to do this in another application. You can therefore copy the messages to your clipboard and paste them from there into an external application, for example Microsoft Excel. Once you have made the required changes, you can them copy the data from the external application and paste it back into the Survey Messages form.

1. Click **Copy Modified Texts...** or **Copy All Texts...** as appropriate.
2. Open the external application you wish to use to edit the texts.
3. Paste the contents of the clipboard into the application.

Note: The message name code is copied along with the actual message text. This is so that when the message is pasted back into Confirmit, Confirmit will know which message is being pasted. When you copy the text(s) prior to pasting them back into Confirmit, you must therefore ensure that you also copy the message name codes.



	A	B
1	__WI_FINISHED_TITLE	You have now completed the survey.
2	__WI_ALTBACK	Go back
3	__WI_ALTNEXT	Go Forward
4	__WI_FINISHED_TEXT	Thank you for completing our survey.
5	__WI_LOGIN_TEXT_SSO	Please enter your User Name to participate in the survey
6	__WI_REJECTED_TITLE	Wrong Link
7	__WI_ALTOK	Submit
8	__WI_REJECTED_TEXT	The link you provided to this survey is invalid. Please note that due to email formatting restrictions, the link you received
9	__WI_TERMINATED_TITLE	Survey Closed
10	__WI_TERMINATED_TEXT	Sorry, but this survey has been closed.
11	__WI_INT_ERROR_TITLE	Internal Error
12	__WI_INT_ERROR_TEXT	Sorry, but the system has encountered an internal error and cannot go on with the interview at this stage.<p> Plea
13	__WI_IN_SERVICE_TITLE	In Service
14	__WI_IN_SERVICE_TEXT	Sorry, but this survey is currently undergoing service and has been temporarily closed.<p>Please check back later
15	__WI_REQUEST_EXPIRED_TITLE	Request has expired
16	__WI_REQUEST_EXPIRED_TEXT	The request has expired. Please do not use the browser back button.<p>Press OK to continue

Figure 197 Example of the messages copied into Microsoft Excel

4. When you have finished editing the text(s), copy them as appropriate, return to the Confirmit Survey Messages window, and click **Paste from Clipboard**.

   The message texts will be updated in the Survey Messages window.

5. Click **Save** to save the changes.

6.4.3. Clearing Edited Texts

In the event you wish to remove all the edited message texts for a survey and return the message texts to their "standard" forms:

1. Click **Clear All Texts**.

   A confirmation dialog box is displayed.

2. Click **OK** to confirm the deletion or Cancel to abort.

Note: Only the texts in the currently-selected language will be deleted. If the survey is available in several languages and you have edited the texts in more than one, then you will need to select each language in turn and clear its texts separately.

3. Click **Save** to save the changes.

6.4.4. Standard Languages

The texts and messages presented to users and/or respondents are translated into a number of "standard" languages. You can specify that any of these languages are to be used by a survey (see The General Tab on page 174 for more information). The languages provided by Confirmit are:

- Arabic
- Chinese simplified
- Chinese traditional
- Czech
- Danish
- Dutch
- English
- Estonian
- Finnish

- French
- German
- Hebrew
- Italian
- Japanese
- Korean
- Norwegian
- Polish
- Portuguese
- Russian
- Spanish
- Swedish
- Thai

Note: The system-generated error messages that are presented to respondents are translated into English, Norwegian, Swedish, German, French, Spanish, Finnish, Danish, Italian, Dutch, Portuguese, Japanese, Chinese Simplified, Chinese Traditional, Korean, Arabic, Russian and Hebrew. For other languages, the error messages will be defaulted into the main category (for example: Venezuelan Spanish into Spanish). If a language is not available, the error messages will be displayed in English, which is the overall default language.

When projects are migrated from one server to another, for example if a user is changing from an On-Premise installation to SaaS, custom error messages for languages that are not covered in Horizons standard list will not be included in the migration and will have to be moved "manually".

6.5. Export Survey Definition

Questionnaires can be exported and imported through XML. The feature allows users to transfer questionnaire definitions, report definitions and individual report definitions from one Confirmit server to another.

You can take advantage of Horizons' XML Web Services directly from the output of the Survey XML Export. This makes integration of questionnaires with other systems much easier for customers developing solutions as the Survey XML Export supports Authoring XML Web Services' object structure.

To export a questionnaire:

1. Activate the survey (select it from the survey list).
2. In the Designer menu, click **Export Survey Definition**.

   The Survey Definition Export overlay opens as shown below.

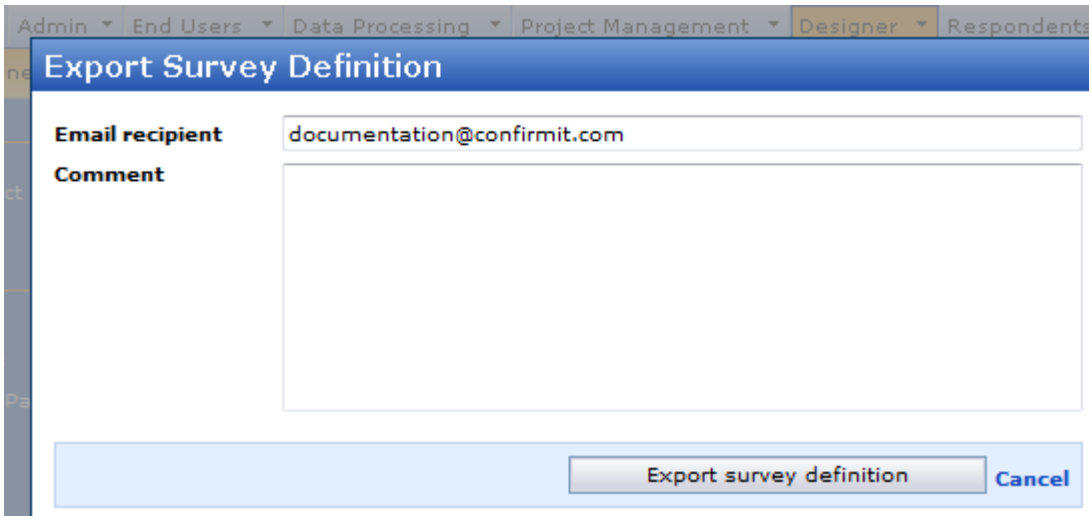


Figure 198 The Export Properties dialog

3. Set the recipient's email address as required (default is the current user (you)) and add a comment as necessary, then click **Export Survey Definition**.

The Survey Definition will be sent in the format of a zipped XML file (.zip) attached to an email, to the address specified.

6.5.1. Some Details on XML Export

- The XML format does not allow the use of <![CDATA[ ]]> tags.
- The top level nodes in the XML file are now <Project><ProjectInfo> (earlier they were<CONFIRMIT><STUDY><PROJECTINFO>).

6.6. How to Export a Survey to Word

This allows you to export a survey to MS Word format, such that it can for example be printed out for proof-reading, copied into a document etc. Note that to export a survey to word, the survey's database must have been launched. To export a survey to word:

1. Go to the **Designer > Export Survey to Word** menu command.

   The Export Survey to Word dialog shown below is displayed.

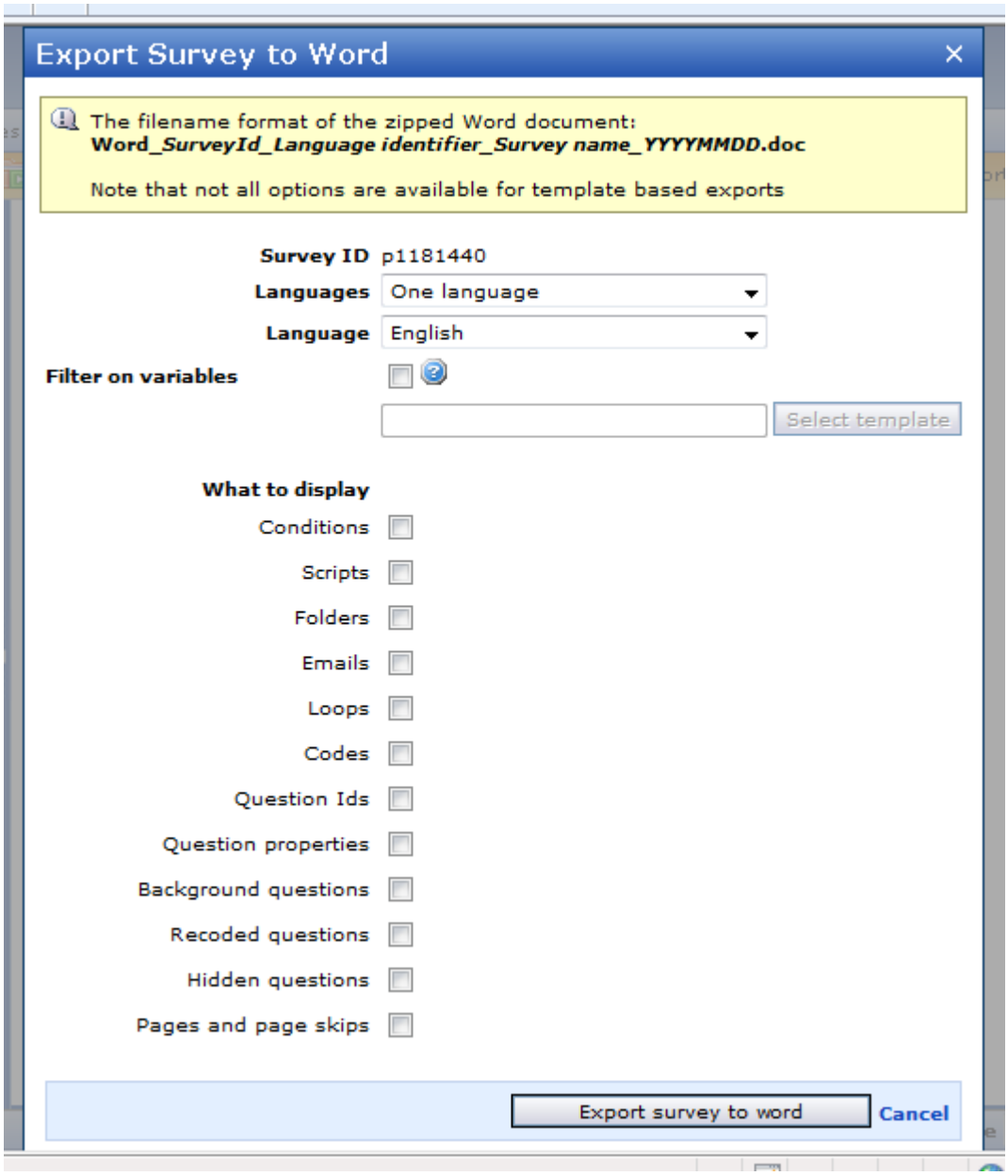


Figure 199 The Export Survey to MS Word dialog

The fields are as follows:

- **Languages -** select which languages you wish to export. If you select One Language, then you can go to the Language drop-down and select the desired language from the list.
- **Filter on variables -** check the box if you wish to filter the export on specified variables. You must then select a template, and you can then select which variables are to be included in the export. To create a new template, go to the **Survey Data > Templates** menu. Note that when using a template, only those variables included in the template will be included in the export; no other nodes will be included. Also, the template will not affect the order of the variables, nor the categories to be included/excluded. Note also that if any variables are selected from a grid, then the entire grid will be exported to Word. When a template is selected, several of the export options will no longer be available. These will be unchecked automatically and will not be selectable.

- **What to display -** select which items from the project you wish to include.

2. Check the boxes for the items you wish to include in the export file.
3. Click **OK**.

   Confirmit generates the document and presents a File Download question dialog.

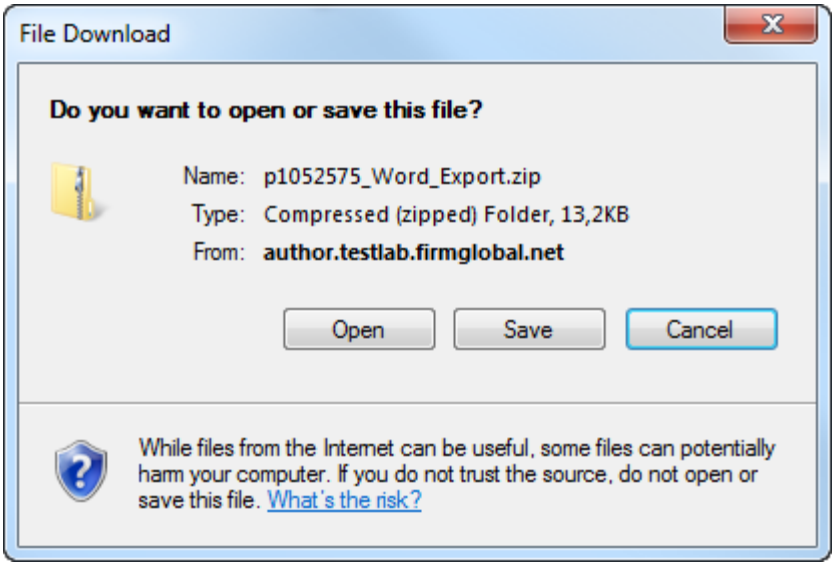


Figure 200 The File Download Question dialog

4. Select **Open** to open the file, **Save** to save it (whereupon you will be asked to specify the file name and location in which it is to be saved), or **Cancel** to cancel the export.

   If you save the file, a File Download Progress window opens.

5. On completion of the operation, if the window does not close automatically, click **Close**.

You can now open the file in MS Word, attach the file to an email etc.

6.7. Single Page Survey Export

This functionality enables you to export an entire survey with all the questions on a single page, using the survey's default survey layout. This is intended only as a tool to simplify reviewing of the survey before going live, and cannot be used in connection with data capture or later presentation.

The export creates a web page with the survey questions listed one after the other on the page, displayed as they will appear to the respondent and rendered as for desktop presentation.

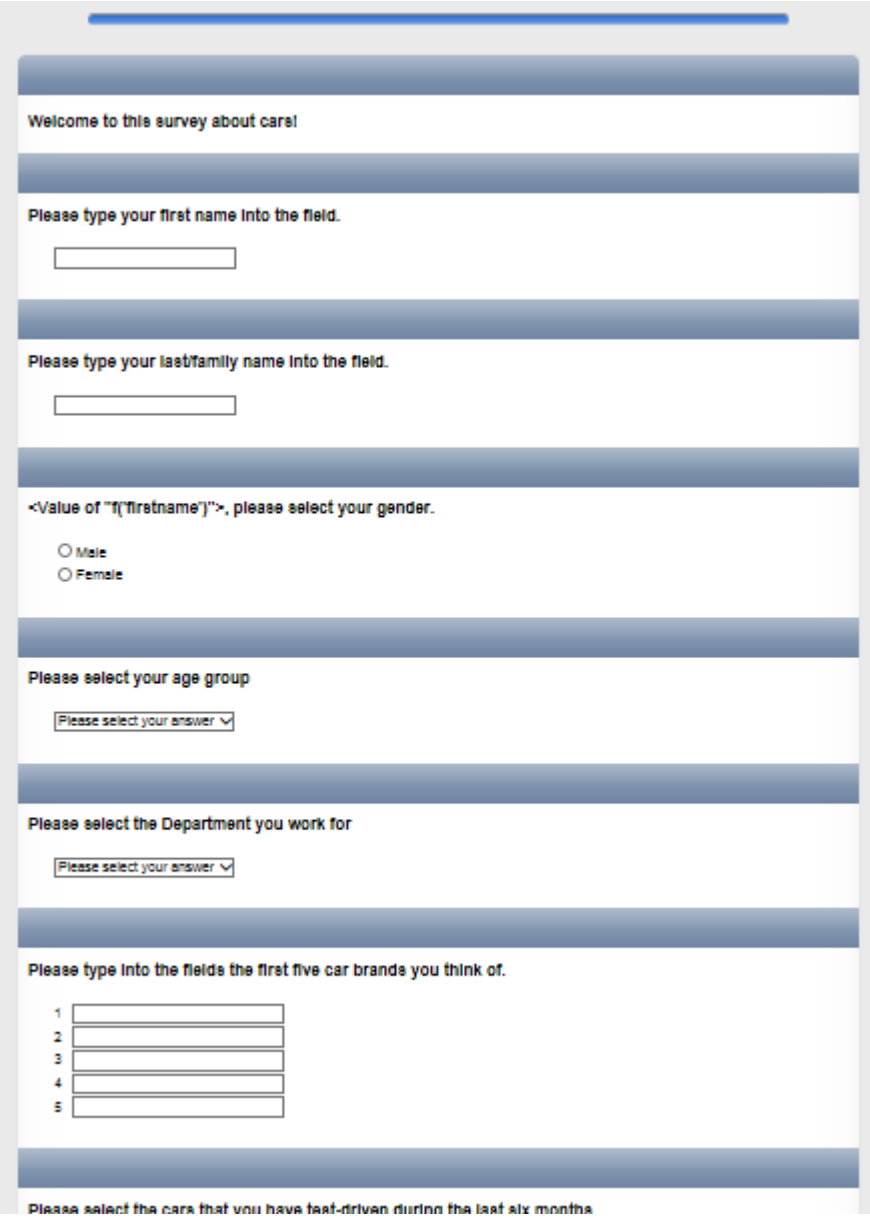


Figure 201 Example of a single page export

The URL to the page is presented on the survey Overview page > General tab (see The General Tab on page 174 for more information), and can be copied from here into for example an email so it can be distributed to reviewers for assessment. The URL will remain valid through subsequent launches of the survey, but will be renewed and changed the next time the Single Page Export task is run (the menu option is used).

When creating the single page survey export you can select which of the survey languages is to be used, and whether or not conditions are to be included.

To create a single page export:

1. In the survey, go to the **Designer > Single Page Survey Export** option or in the **Designer** menu bar click **Single Page Survey Export**.

   The Single Page Survey Export overlay opens.

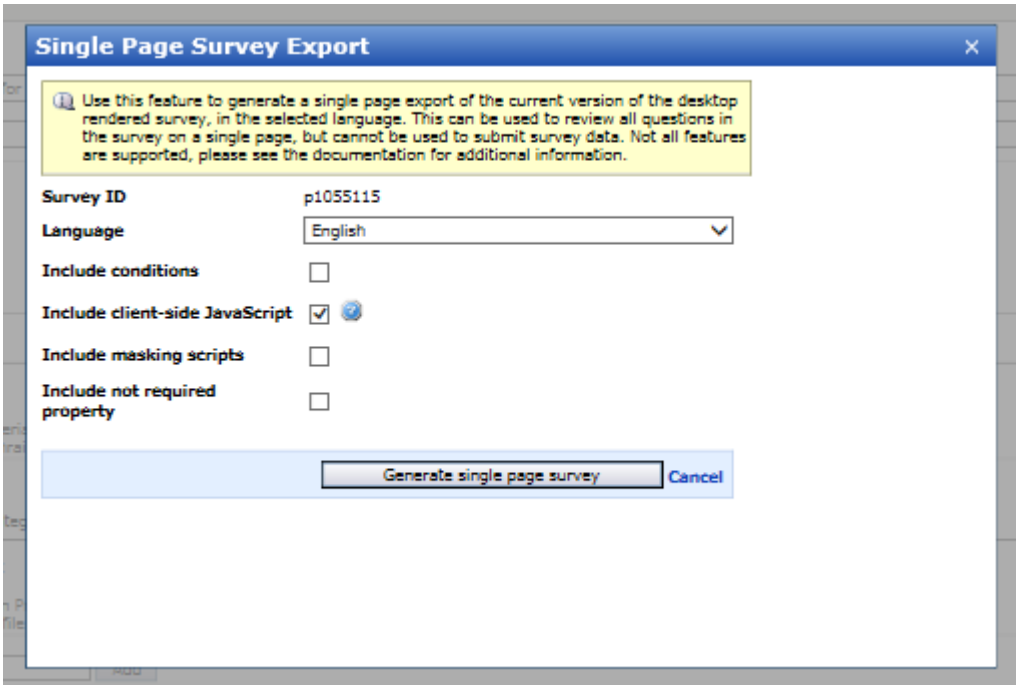


Figure 202 The Single Page Survey Export overlay

2. For a multi-language survey select the language to be used, and include conditions if required.
3. If you wish to include client-side JavaScript, check the box.

   Note that when this box is checked, any script code contained within the JavaScript property/tab for the question will be included in the page. Be aware that including this code can lead to undesirable behavior when the survey is rendered on a single page. This option does not control the inclusion of any inline scripting embedded in text fields; any such script will always be included.
4. If you wish to include masking scripts and/or the “Not required” property in the export, check the appropriate boxes.
5. Click **Generate...**

   The generation task is run, and on completion the URL is displayed towards the bottom of the task page along with a Copy to clipboard link. The URL is also placed on the General tab of the survey’s Overview page.

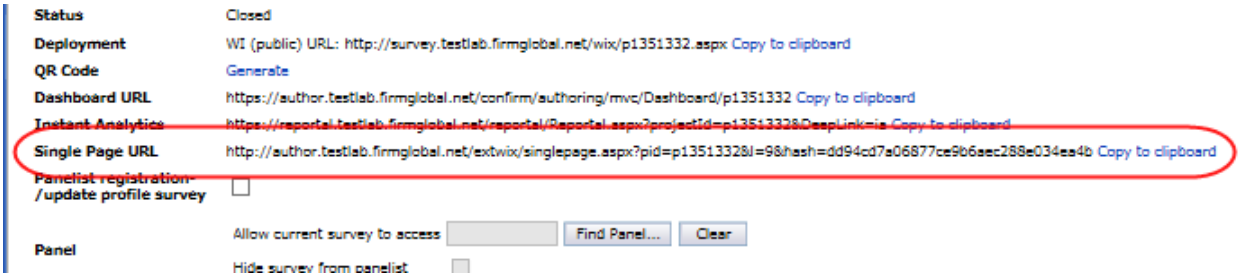


Figure 203 The URL now available on the Overview > General tab

You can now copy this URL to the clipboard and paste it into your browser, an email etc.

6.8. Designer Log

Confirmit records all actions executed on a survey, and the Designer Log provides you with an overview of all the changes that have been made to the survey. The system records the date and time when a change was made, the user who made the change, and provides a brief description of the change .

You can undo any changes that have been made - click the **Undo** link towards the right side of the window for the relevant change. A confirmation message appears; click **OK** to confirm the operation.

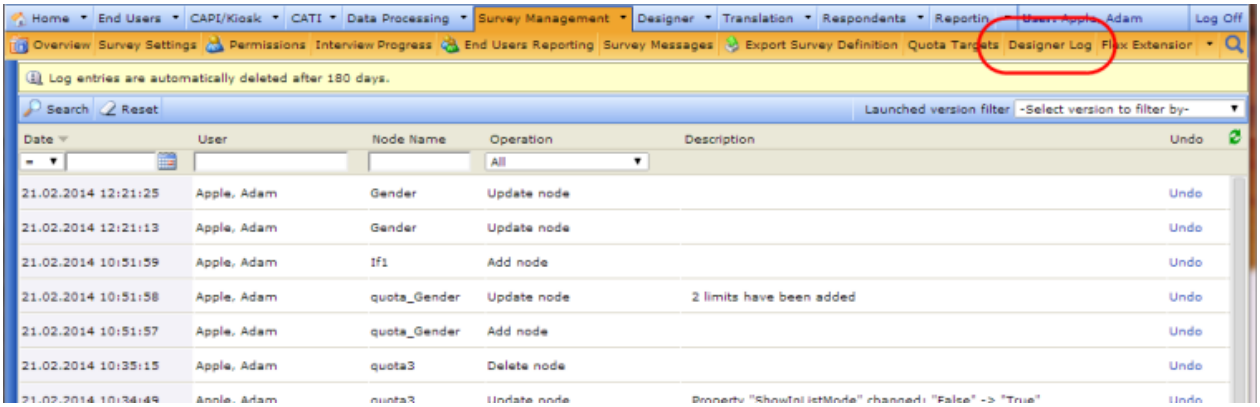


Figure 204 Example of a Designer log

6.9. Confirmit Express

If the survey you have selected is a Confirmit Express survey, you will also have the **Convert to Survey Designer** button in the toolbar. If you have opened the survey as an Approver, then the toolbar will also include the **Approve Survey** and **Deny Survey** buttons (see the figure below).

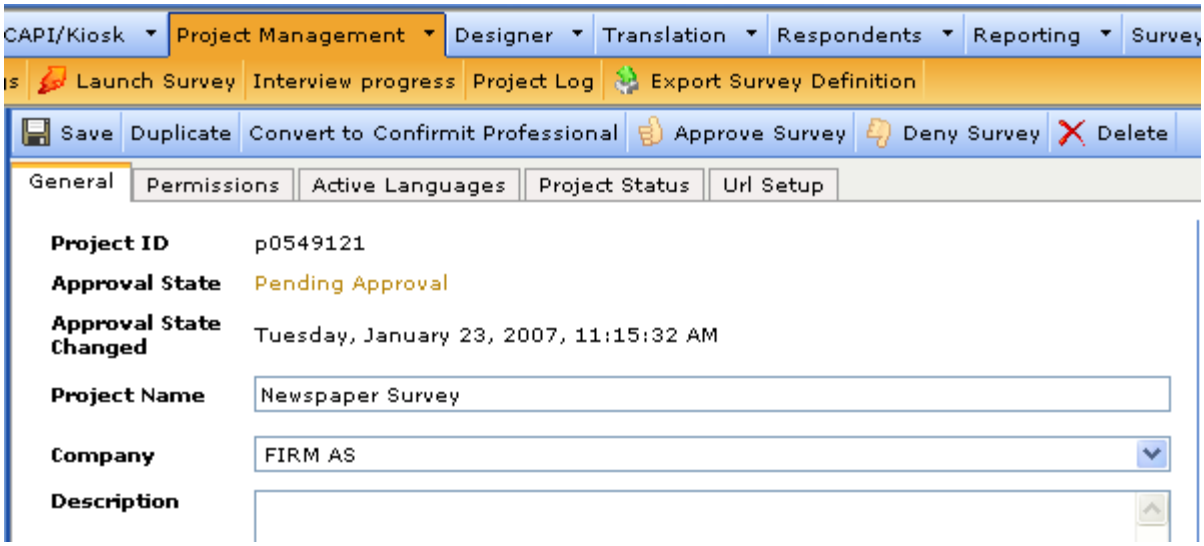


Figure 205 The Survey Overview General tab for an Express survey

For further information about Confirmit Express, refer to the Express User Guide.

6.9.1. How to Convert a Survey from Express to Designer

Confirmit Express surveys can be converted to Survey Designer. You will need a Designer user login to do this. To convert a survey:

1. Log on to Survey Designer and open the survey.
2. Go to the **Survey Management > Overview** menu command.
3. In the page's toolbar, click the **Convert to Survey Designer** button.

   A warning message is displayed.
4. Confirm the conversion.

Important
Be aware that once an Express survey has been converted to Survey Designer it can no longer be opened in Express and cannot be converted back to Express. The conversion will also remove any skip logic that was in the survey.

6.9.2. How to Approve an Express Survey

Supervisors who have the Approver permission may be asked to approve surveys for Express users within the company. All those with the Approver permission will be listed in the Approver drop-down that appears as a step in the Express survey deployment procedure (see the Express User Guide for further details), and if selected, will receive an email containing a link to the survey to be approved.

1. In the email, click the link to open a web browser window with the survey.
2. Work through the survey and ensure it looks and functions as it should. You will be required to add information to the survey and make selections just as a "normal" respondent will be once the survey is published and on-line.
3. On completion, assuming the survey functions as required and does not need any changes, log on to Confirmit (not Confirmit Express), open the survey, and click the **Approve** button. You must also reply to the email, to inform the Express user that the survey has been approved. Once the survey has been approved, it will be given a green icon in the Approval Status column in the survey list.

   In the event changes to the survey are required, click the **Deny Survey** button and inform the user. The survey will then be given a red icon in the Approval Status column in the survey list. The Express user will then have to edit the survey, before re-sending it for approval.

Note: When an Approver is allocated a survey to approve, he/she will automatically be given full editing rights to that survey.

7. Designing Questionnaires

In Confirmit Horizons Professional Authoring there are two types of questionnaire designer available: Standard Designer and Professional Designer. Standard Designer is intended for simple questionnaires with no advanced scripting or routing. This manual describes Professional Designer.

7.1. Creating a New Survey

Note: This topic describes the procedure for a Professional user. Standard users have some reduction in functionality and options.

To create a new survey:

1. If you have not already done so, log in to Confirmit .
2. In the Home page left column, under **Create New**, click the **Survey** icon, or, go to the **Home > New > Survey** menu command.

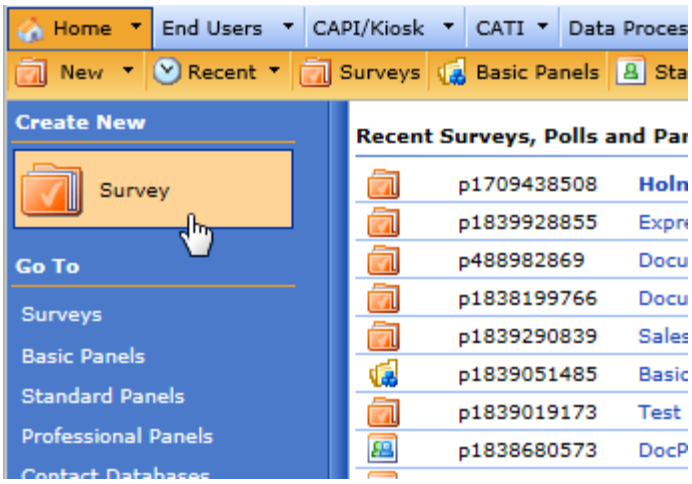


Figure 206 The Create New Survey icon

The New Survey overlay opens.

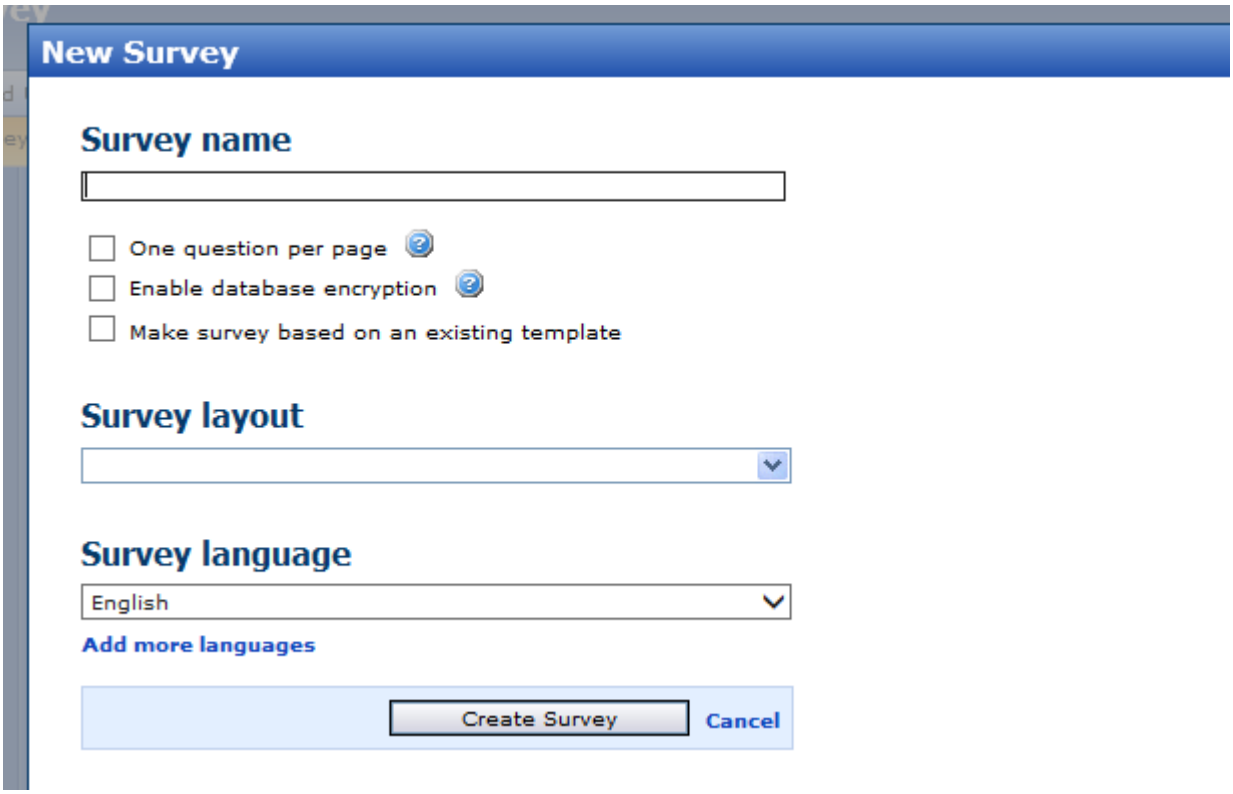


Figure 207 The New Survey overlay

3. Type the desired name of your survey into the Survey Name field.
4. Check the boxes as appropriate:

   a) to specify one question per page.

   b) to enable database encryption. If your company has licensed the database encryption add-on, then when this option is checked the survey database will be encrypted. The encryption will include Response, Respondent and Hub data. Note that database encryption cannot be changed after initial launch (in either test or production mode).

   c) to base the survey on an existing template (see How to Create a Survey Template on page 183 for more information) [Professional users only]. If you select to base the survey on an existing template, a **Find Template** link appears. Click this to open a Select Template page, and select the template you wish to use.
5. Click the down-arrow beside the Survey Layout field to open the drop-down list of the survey layouts available to you, and select the Survey Layout you wish to use (see Survey Layouts on page 65 for more information).
6. Select the survey language you wish to use. By default Confirmit suggests the language selected in your User Settings, in this case **English**.
7. If you wish to add more languages, click the **Add more languages** button to open a Select Languages dialog , select the languages you wish to use and click **Use these languages** to return to the New Survey overlay. Note that Standard users must have a special "Multilingual" permission to create multilingual surveys.

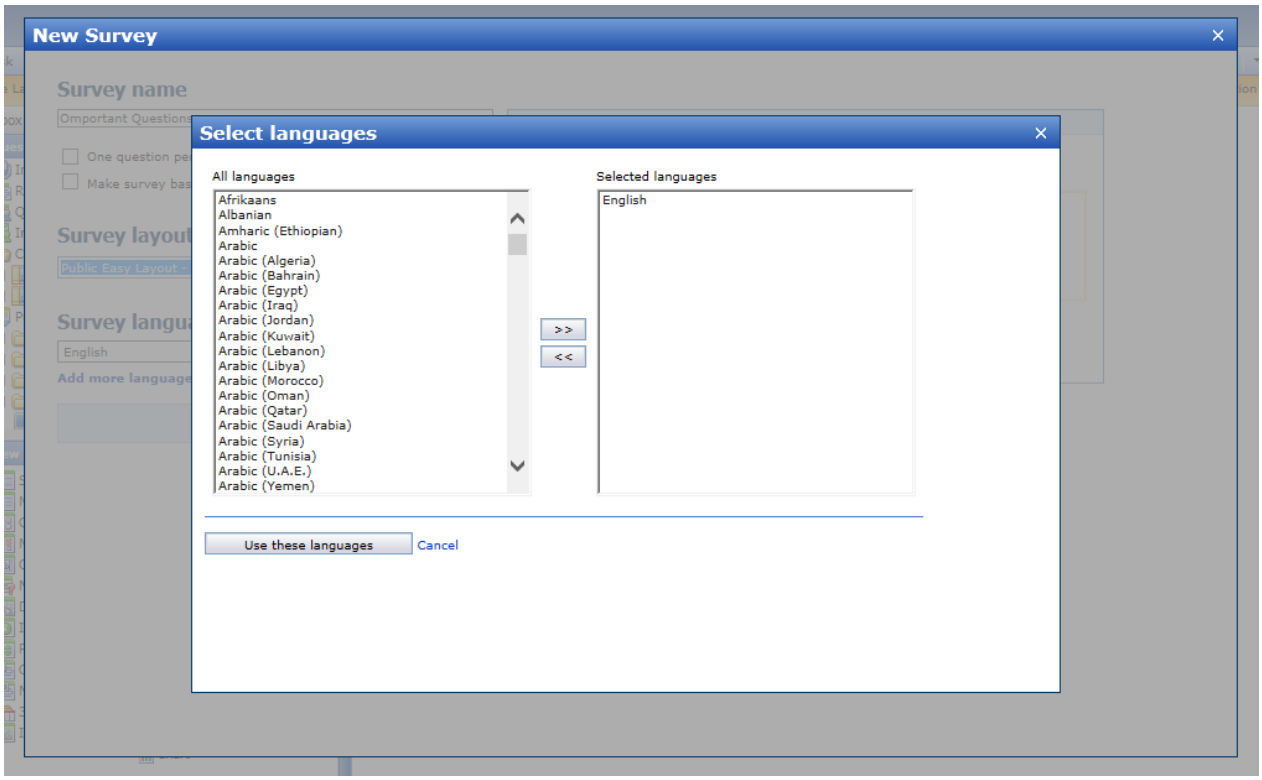


Figure 208 The Select Languages dialog

8. Click **Create Survey** to complete the procedure.

   The survey is created and the Survey Designer page for the survey opens. If you wish to add details such as a description, additional languages and categories to your survey, go to the **Survey Management > Overview** menu item.

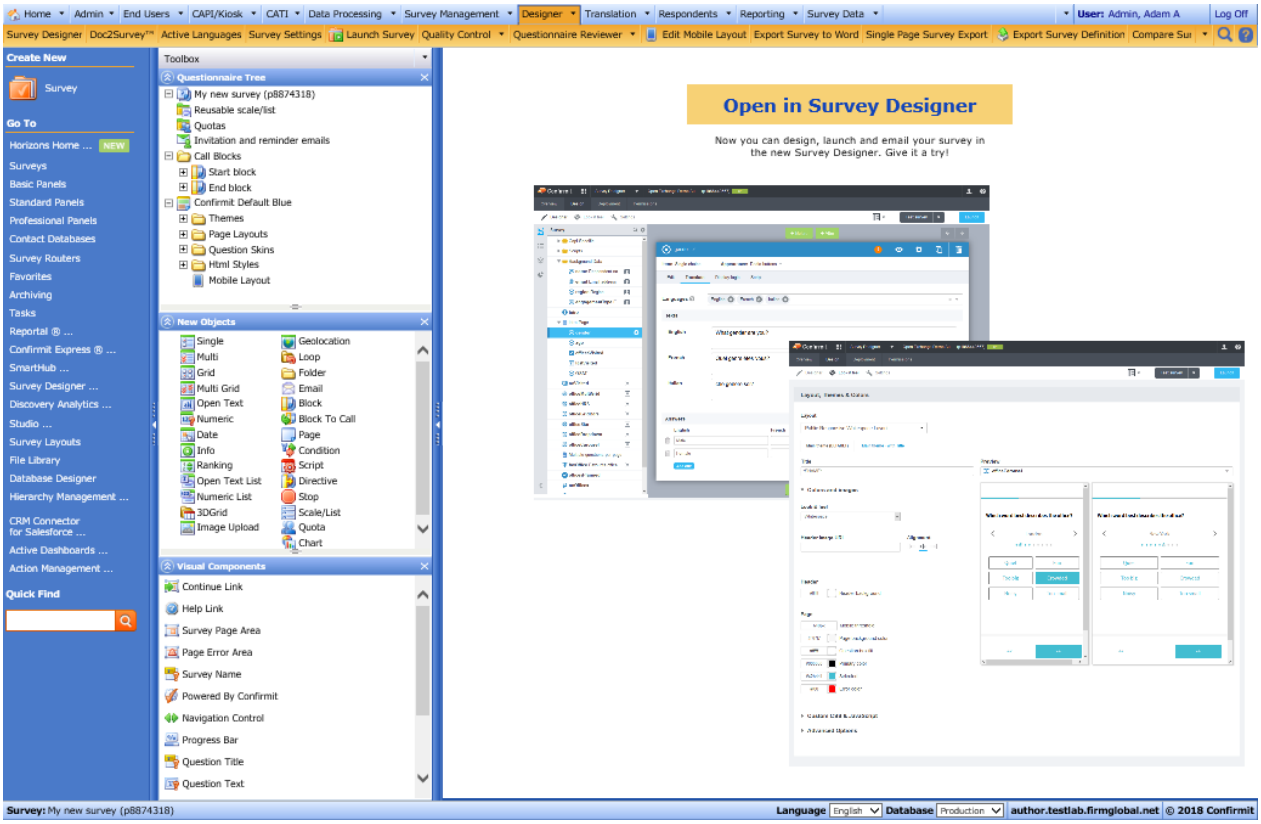


Figure 209 The Survey Designer page

The survey now exists, and you can add the question you wish to ask your respondents. Note that Confirmit has given the survey a unique Survey ID - the pxxxxxxxx number beside the survey name at the top of the Questionnaire Tree toolbox, and also located in the bottom-left corner of the Confirmit window.

Note: Click the Open in Survey Designer link to open Survey Designer in a new browser window and open the survey at the Design page. Refer to the separate Survey Designer User Guide for information on this application.

7.2. Doc2Survey

Many survey designers like to (or would like to be able to) design their survey first in MS Word, then copy the texts over to Confirmit to build the actual survey. Up to now this has been a relatively cumbersome process, requiring constant switching from Word to Confirmit and back as you copy one piece of text over at a time. The Doc2Survey functionality enables you to copy a Word document into a scratch-pad-like browser. From here you can then select the texts you wish to use for questions, answers etc. and convert them directly into a Confirmit survey.

When you copy a Word document into the Doc2Survey browser, all Word formatting (layout, text highlighting such as bold and italics, tables, numbered lists and bullets etc.) is retained. The document in the browser therefore looks just like the original Word document, so it is easy for you to keep track of where you are. As you convert the text into the survey however the formatting is removed to ensure you don't carry in spurious background code that might interfere with the Confirmit layouts. All text formatting within Confirmit therefore remains under the control of the Confirmit styles and property settings.

Doc2Survey is based on a reduced functionality questionnaire tree. It is available to all types of user, and requires no installation - it is not an MS Word or browser plugin.

Once you have built a questionnaire using the Doc2Survey functionality, the survey is a standard Confirmit survey and can be edited in Survey Designer. You can switch backwards and forwards between Doc2Survey and Survey Designer at any time, so you can for example take an existing questionnaire and edit it in Doc2Survey.

Note that the editing and formatting possibilities in Doc2Survey are limited - you cannot for example create conditions or loops here. If you add a condition or a loop to the questionnaire in Survey Designer, the node will be visible in the Doc2Survey Questionnaire Tree but you will not be able to edit it there. You will however be able to edit a question within the node. Any question types that are added to the survey in Survey Designer that are not supported by the Doc2Survey functionality will appear in the Doc2Survey Questionnaire Tree with the text "Unsupported question type".

Predefined scales and answer lists can be created from the Word document, then used in the survey.

When you select the **Designer > Doc2Survey** menu item for the first time, the information page shown below opens.

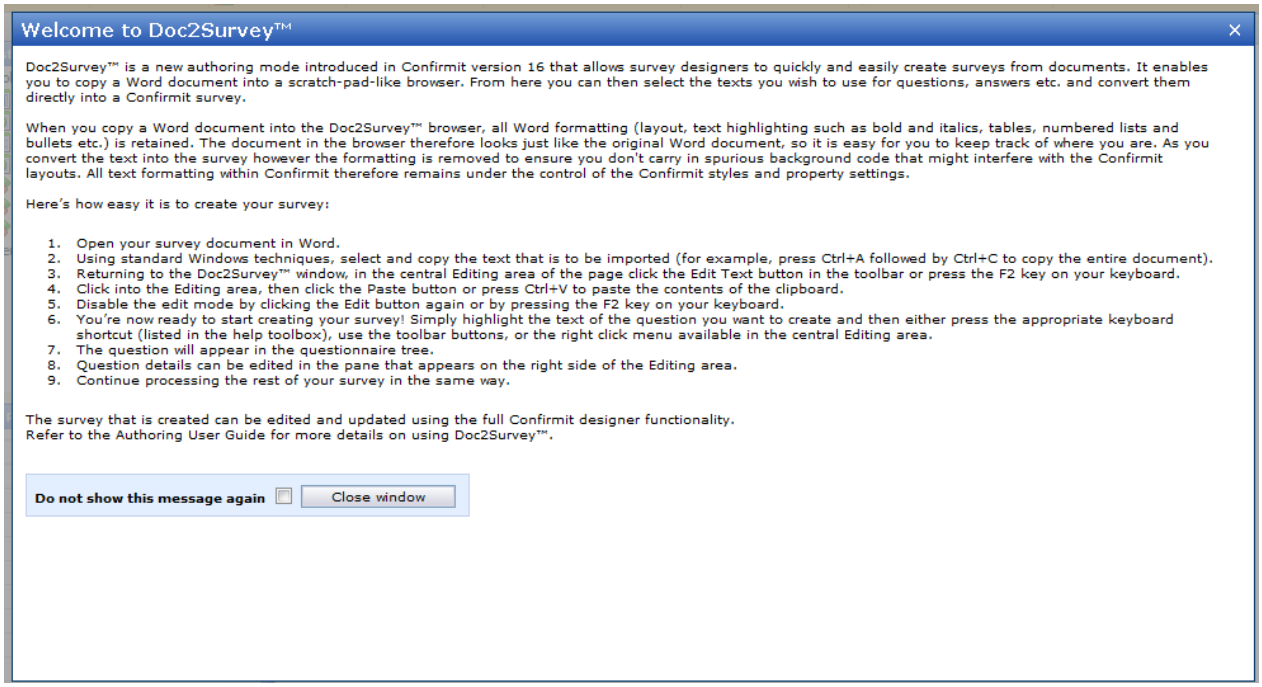


Figure 210 The Doc2Survey information page

Once you have read the information, if you do not wish to view the page again check the box, then click **Close Window**. The Doc2Survey page opens.

7.2.1. Doc2Survey Functionality

The Doc2Survey page comprises three panes.

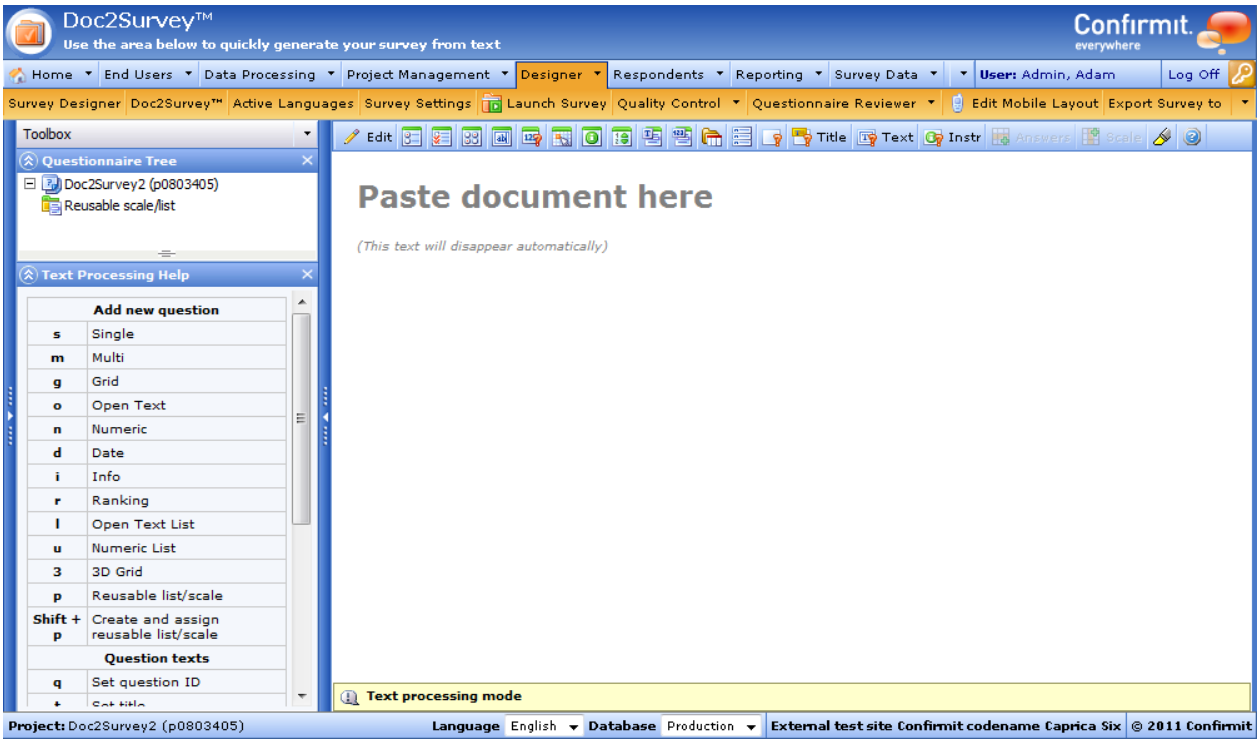


Figure 211 The Doc2Survey page

The pane on the left is the toolbox. This contains the Questionnaire Tree as you build it, and the Text Processing Help list. The central area is the text editing area into which you copy the text from your Word file, and can include two toolbars. The area to the right is the Question Details pane. Once you have created a question (or selected an existing question), the Question Details pane lists details such as the Question ID, Title, Text, answers etc.

Note that any text remaining in the central text editing area when you close the Doc2Survey window will be saved with the survey and will be available to any user who edits the survey.

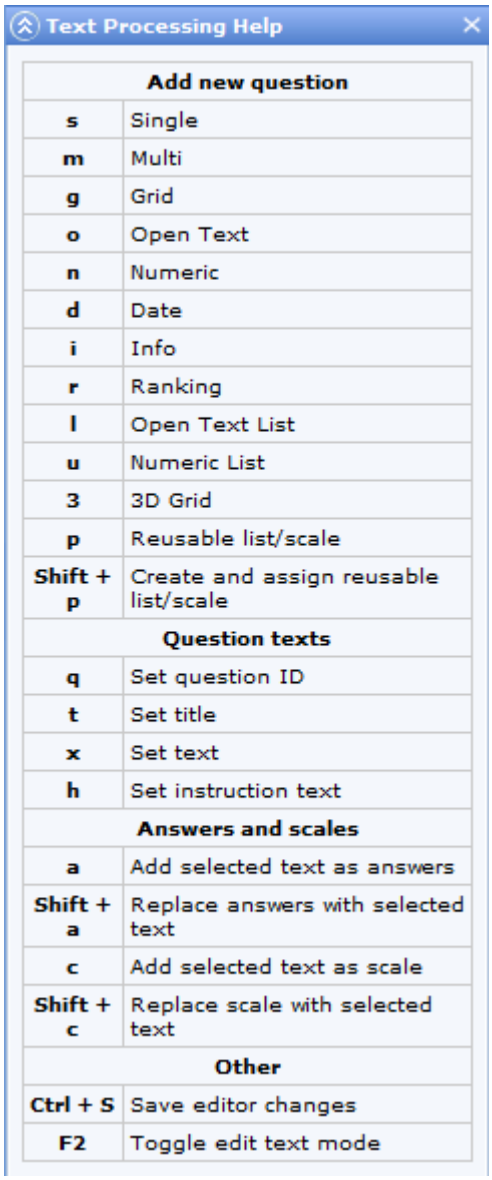
You can use the cursor (arrow) keys on your keyboard to move the cursor around the Editing area and to select text. To select text, press and hold the **Shift** key while you move the cursor using the arrow keys.

Once you have some questions in the Questionnaire Tree, you can right-click on a question to open a context menu. Here you can edit the question, insert additional questions using standard Confirmit procedures, convert the question to a different type, preview it, duplicate or delete it etc.

Note that some buttons in the toolbar and some items in the right-click drop-down menu are only available when an appropriate question is selected in the Questionnaire Tree. For example the **Text** and **Title** buttons are available when any question is selected, while the **Scale** button is only available when a Grid question is selected.

7.2.1.1. The Doc2Survey Toolbox

In the Toolbox pane, the Text Processing Help area shows a list of the keyboard keys you can use to create the respective questions, texts, answers etc. This is purely to assist you; there are no buttons or links here.



Add new question	
s	Single
m	Multi
g	Grid
o	Open Text
n	Numeric
d	Date
i	Info
r	Ranking
l	Open Text List
u	Numeric List
3	3D Grid
p	Reusable list/scale
Shift + p	Create and assign reusable list/scale
Question texts	
q	Set question ID
t	Set title
x	Set text
h	Set instruction text
Answers and scales	
a	Add selected text as answers
Shift + a	Replace answers with selected text
c	Add selected text as scale
Shift + c	Replace scale with selected text
Other	
Ctrl + S	Save editor changes
F2	Toggle edit text mode

Figure 212 The Text Processing Help toolbox

For example, to create a single question, place the cursor in a word in the Editing pane, then press the **S** key on your keyboard; to set a word as the question ID for a question, place the cursor in the desired word in the Editing pane, then press the **Q** key.

7.2.1.2. The Doc2Survey Editing Modes

The Doc2Survey functionality has two modes:

1. The **Text Processing mode**, in which you can create questions, answers, question texts etc. by selecting text and pressing the appropriate key on your keyboard, by clicking on the question type in the toolbar or by the right-click menu. When you are in this mode, the secondary Editing toolbar is not available and the text "Text processing mode" is displayed in the lower-left corner of the editing pane

2. The **Edit mode**, in which you can edit the text you have copied from the Word file into the Doc2Survey page. When you are in this mode the secondary Editing toolbar is available and the text "Edit mode" is displayed in the lower-left corner of the editing pane. Any changes made to the copied-in text and saved will be remembered and will be available to any user with permission to access this survey.

Toggle the modes by clicking the **Edit Text** button or pressing the **F2** key on your keyboard.

7.2.1.3. Methods for Creating Questions

There are several methods available to you for creating questions:

Whilst in the **Text processing mode** (the secondary toolbar is not visible):

- Put the cursor in the middle of a word and press the appropriate character key on your keyboard (see the list of available keys in the Text Processing Help toolbox). The question will be created using the word in which the cursor is located as the Question ID, and all the text in the row as the question text.
- Select a word and press the appropriate character key on your keyboard. The question will be created using the selected word as both the Question ID and the question text. Note that if you select more than one word, the selected text will be used as the question text, and the Question ID will be the appropriate "q" number, for example "q10".
- If you select all the text in a table and press **G**, the first row will be set as the scale, and the first column will be set as the answers (see How to Create a Grid Question on page 213 for more information). You will then also need to go into the Question Details to add the title, text etc.
- In addition to the keyboard keys, you can also use the question buttons in the Doc2Survey primary toolbar or the right-click menu in the central text area to create the questions.
- Put the cursor in the middle of a word, right-click, and select the question type that you wish to create from the drop-down list. You can also use this "right-click" method to create Titles, Text, Instructions, Answers and Scales, or mark the selected text or row.

Whilst in the **Edit mode** (the secondary toolbar is visible), only the question buttons in the Doc2Survey primary toolbar, and the right-click drop-down menu, are active; you cannot now use the alphanumeric keys on your keyboard as these are now available for editing the text.

7.2.1.4. Marking Text

Click the **Mark Text** button to automatically give processed text a gray background. Click the button again to switch off the functionality.

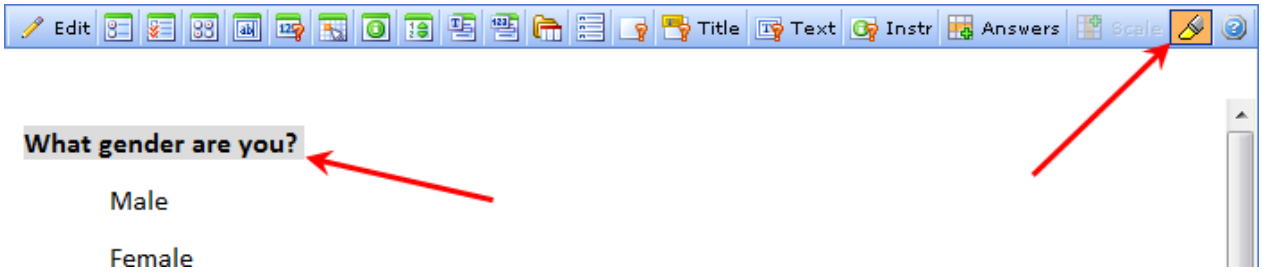


Figure 213 Marking processed text

You can also "manually" mark text: select the text to be marked, then right-click and select **Mark Selected Text** from the drop-down menu. To remove marking, select the text, right-click and select **Unmark Selected Text**.

7.2.2. How to Import a Word Document into the Doc2Survey Functionality

To import a Word document into the Doc2Survey functionality to build a new Survey, proceed as follows:

1. Create a new survey in the normal manner (see Creating a New Survey on page 202 for more information).

   Once Confirmit has created the survey, the Survey Designer page opens.

2. Click the **Doc2Survey** button in the Designer toolbar.

   The Doc2Survey page opens.

3. Open MS Word, and open the Word document that you wish to import to the survey.
4. Using standard Windows techniques, select and copy the text that is to be imported (for example, press **Ctrl+A** followed by **Ctrl+C** to copy the entire document).
5. Returning to the Doc2Survey window, in the central Editing area of the page click the **Edit** button in the toolbar.

   This opens the Edit Mode toolbar, and the remaining steps in the procedure are explained using the toolbar buttons. However note that the standard copy, cut and paste keyboard shortcuts can also be used here.
6. Click into the Editing area, then click the **Paste the contents of the clipboard** button.

Note: You can paste the contents of the clipboard into the editing area without going to the Editing mode.

The selected text is copied into the editing area.

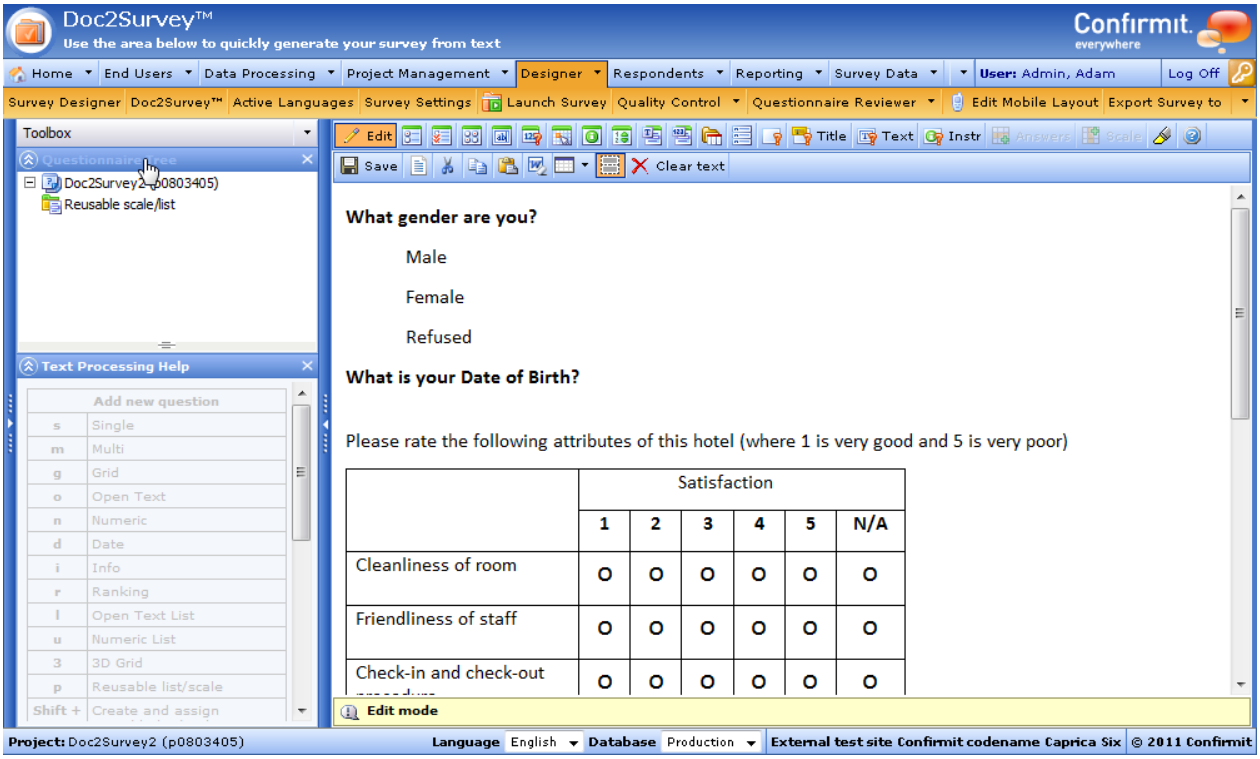


Figure 214 The text to be imported is copied into the central Editing area

7. Disable the edit mode by clicking the **Edit** button or by pressing the **F2** key on your keyboard.

You are now in a position to convert the text to questions.

To clear all the text from the editing area, click the **Clear text** button. Note that any text remaining in the central text editing area when you close the Doc2Survey window will be saved with the survey and will be available to any user who edits the survey.

7.2.3. How to Create a Single Question

The first question in the example survey is to be Gender, which will be a single question with three answer options. The procedure below describes using the toolbar buttons. However note that the keyboard keys listed in the Text Processing Help toolbox can also be used if you go to the Text Processing mode (see Doc2Survey Functionality on page 206 for more information), and standard copy, cut and paste keyboard shortcuts can also be used here.

To create the Gender question:

1. In the Editing area, click in the word **gender**. Note that you do not need to select the word; just click in it such that the cursor is located somewhere within the word.

   If you select some text, for example a word, then the selected text will be used as the Question Text and the Question ID will be for example q1. If you wish to change the Question ID, then place the curser in the desired word and press the **Q** key on your keyboard or click the **Set qid for current question** button in the toolbar.

2. In the toolbar above the Editing area, click the **Create a Single question** button.

   A single question with the name **gender** is added to the questionnaire tree, and the question details are posted in the column to the right. Note that the entire line of text "What gender are you?" is used as the question text, while the Title and Answers fields remain empty. Note also that the Text Marking functionality has been used here.

Note: A new question will always be positioned immediately below the selected question in the Questionnaire Tree.

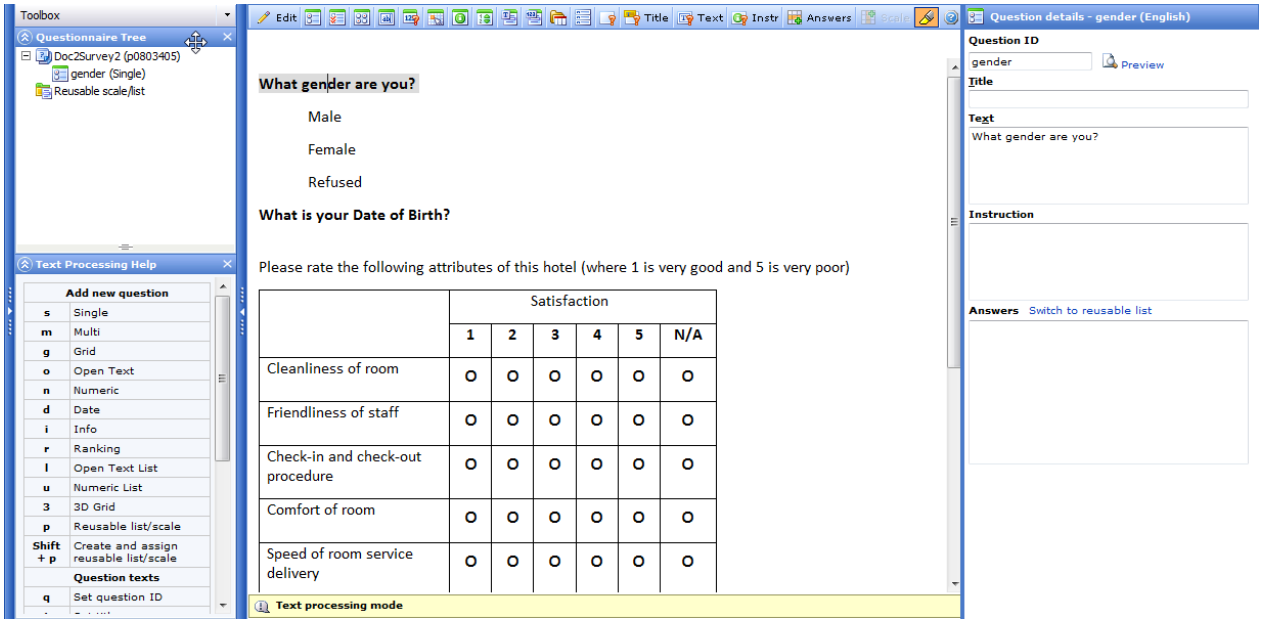


Figure 215 The gender question is created

3. Add a title for the question if required, either by selecting the appropriate text and clicking the Title button or by typing the desired text "manually" into the field.
4. In the editing area, select the three answer options (these can be selected as one block of text).
5. Click the **Answers** button in the toolbar.

   The three answer options are pasted into the Answers field.

Note: Text selected for Answers and Scales is given special treatment to remove any leading or trailing spaces, underscores, tabs etc. such that the resulting options reside on consecutive rows in the list. Sets of answer that are contained with tables in the basis Word document, will be treated such that for each row, the first cell containing text will be considered the answer text. Subsequent cells in the same row containing text will be ignored, as will any "trailing" empty cells.

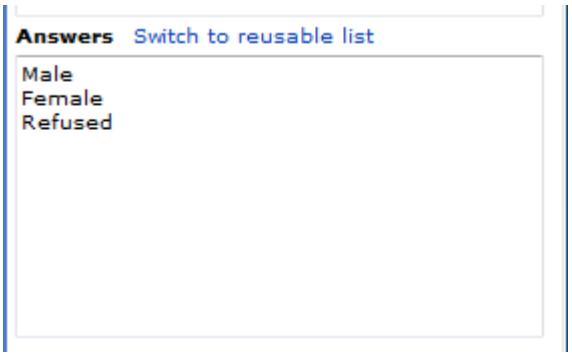


Figure 216 The answer options

You can also add an Instruction text if desired using the same procedure, but otherwise the Gender question is now complete. You can preview the question by clicking the **Preview** button beside the Question ID field in the Question Details column.

Note: Changes made to the Questionnaire Tree and the Question Details fields are saved automatically as they are made - there is no Save button for that functionality. If you edit the text in the Editing area, you can save those changes for future use by clicking the Save button in the Editing toolbar or by clicking the Ctrl+S keys on your keyboard.

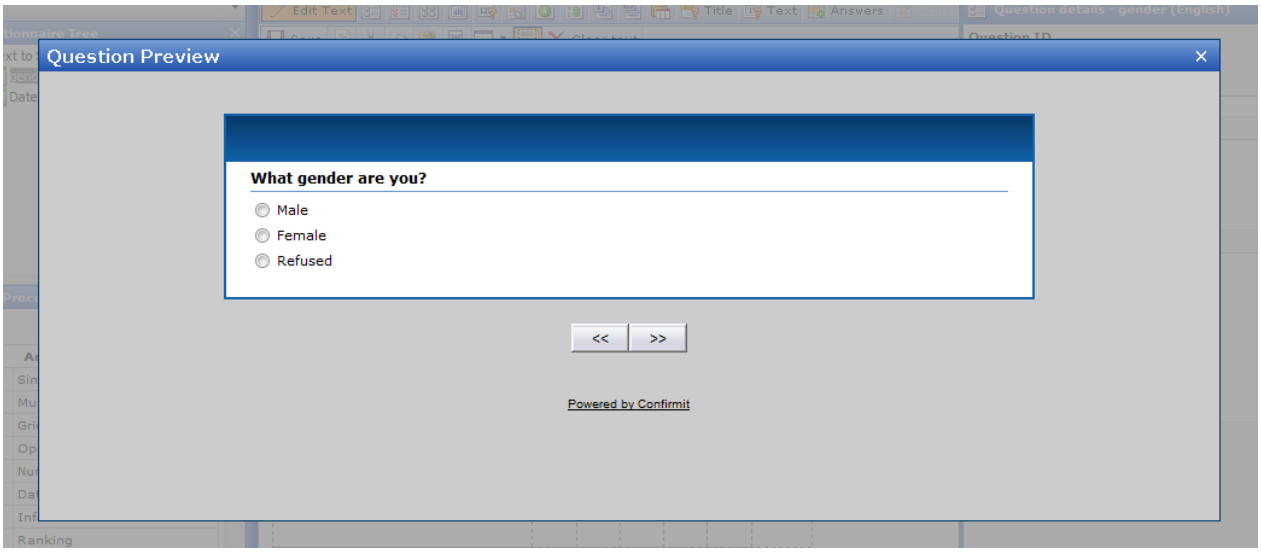


Figure 217 Previewing the question

7.2.4. How to Create a Date Question

The next question will ask the respondents for their date of birth. To create this Date question:

1. In the Editing area, click into the word **Date**, then click the **Create a Date question** button.

   A Date question is created in the Questionnaire Tree, and the Question Details are posted in the right column.

Note: A new question will always be positioned immediately below the selected question in the Questionnaire Tree.

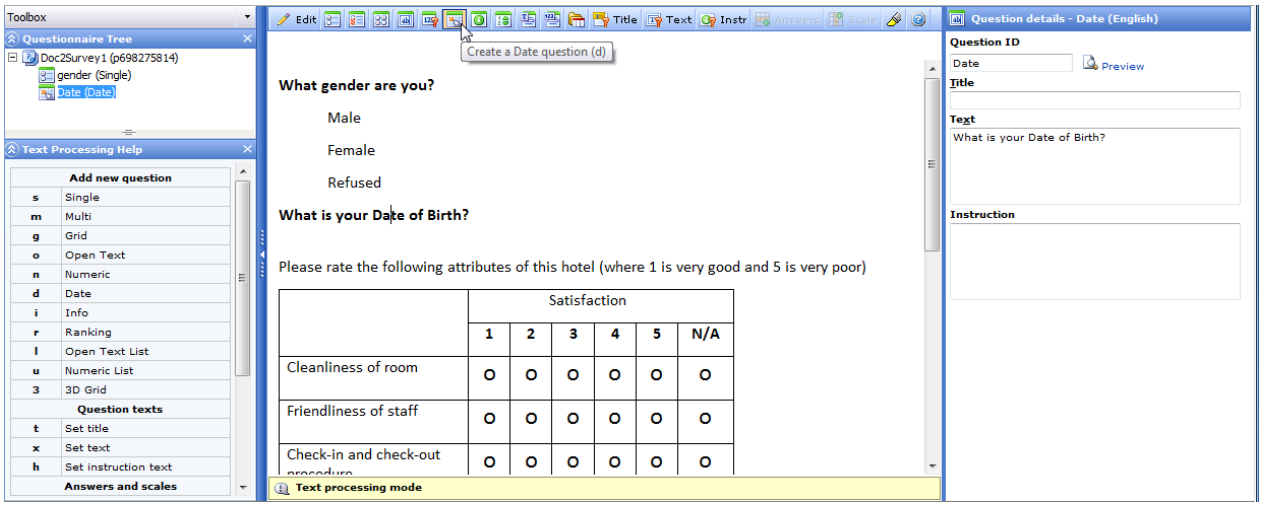


Figure 218 Creating the Date question

2. Add a Title and/or Instruction as necessary.

   Note that there is no Answers field for this type of question. To preview the question, click the **Preview** button beside the Question ID field in the Question Details column.

7.2.5. How to Create a Grid Question

The next question will ask the respondents to rate the attributes of a hotel.

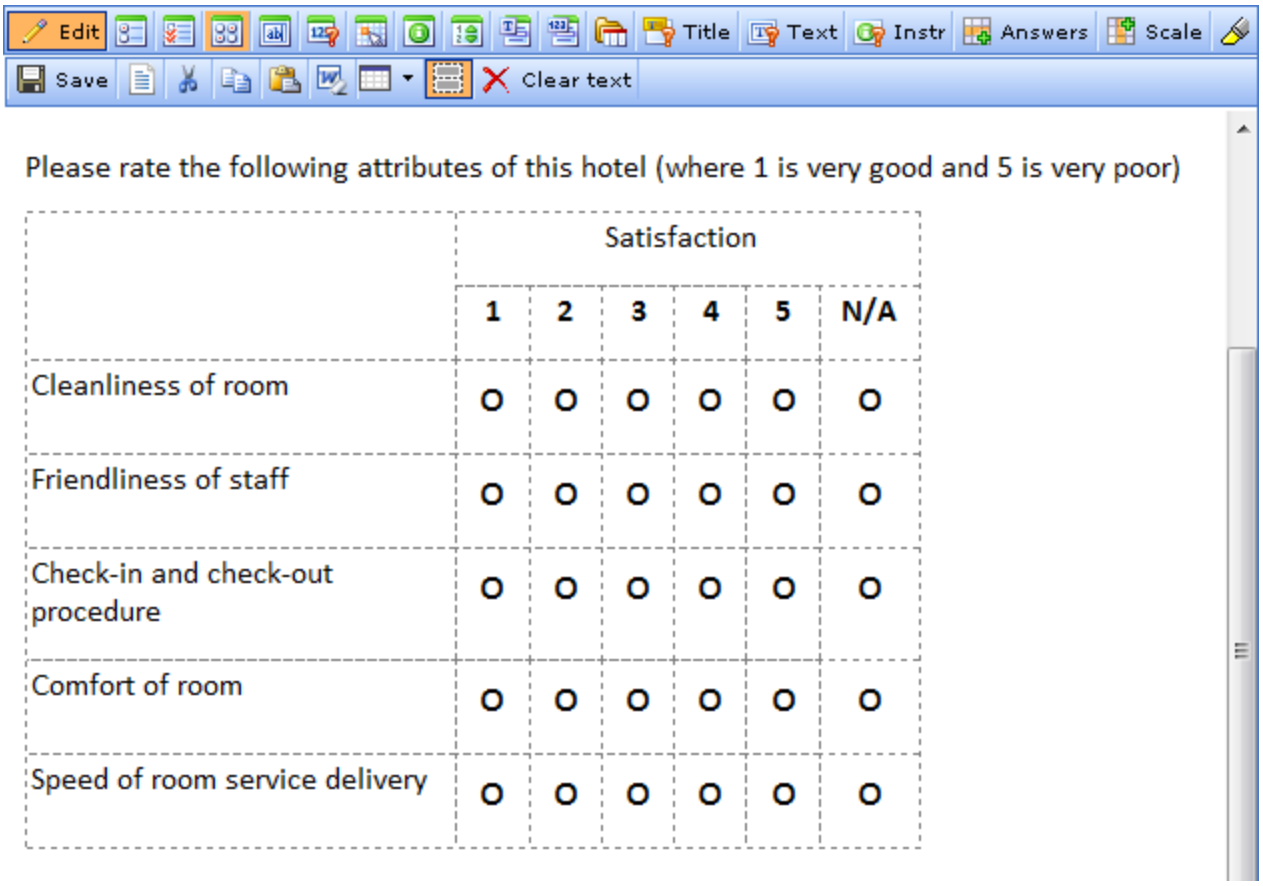


Figure 219 The Grid question to be imported

To create this Grid question:

1. Select the rows and columns in the grid that are to be imported.

Note: When the columns have a common header, as in the grid here (Satisfaction), select only the numbered headers (1 to 5 and N/A) and the rows. The rows will then become the Answers while the number and N/A columns will become the Scale. If you select the complete table including the Satisfaction header, the rows will still become the Answers but Satisfaction will be the only Scale option.

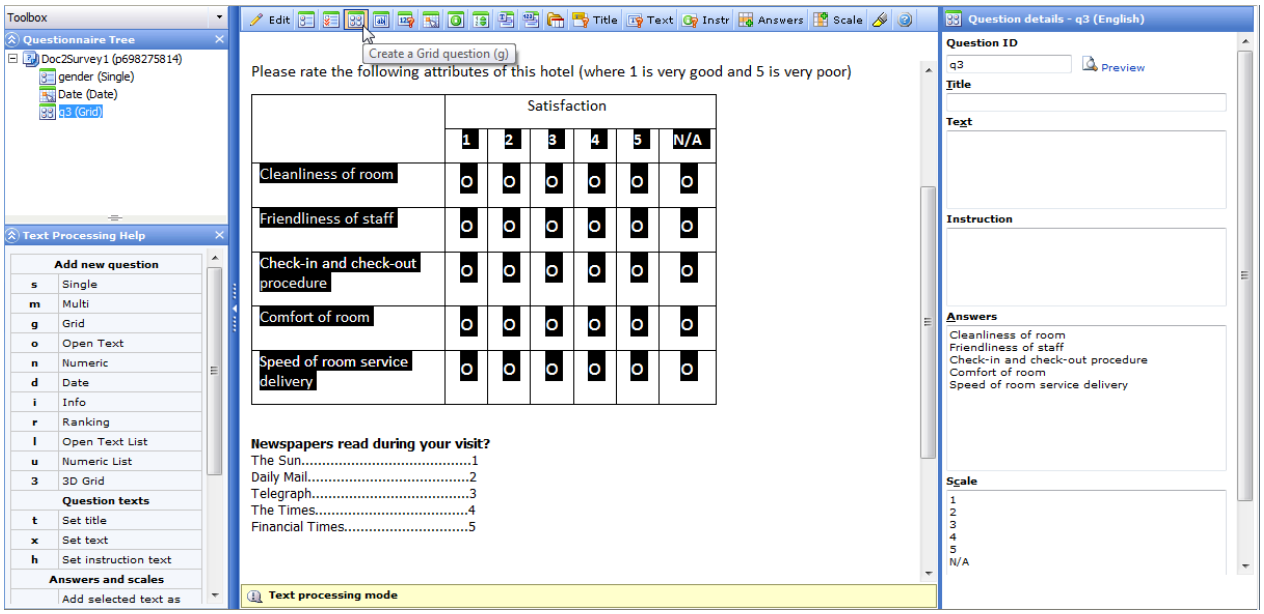


Figure 220 Creating the Grid question

2. Click the **Create a Grid question** button.

Note: A new question will always be positioned immediately below the selected question in the Questionnaire Tree.

The question is created in the Questionnaire Tree, and the Answers and Scale are added to the Question Details. Note that Answers and Scales are given special treatment to remove any leading or trailing spaces, underscores tabs etc. In this case you will now also need to create the question Title, Text and Instruction if necessary.

3. Select the text **Please rate the following attributes of this hotel**, then click the **Text** button.

   The selected text is copied into the Text field.

4. For the Title for this example, select the word **attributes** then click the **Title** button.
5. For the Instruction, select the text **(where 1 is very good and 5 is very poor)** and click the **Instr** button.
6. You can preview the question by clicking the **Preview** button in the Question Details column.

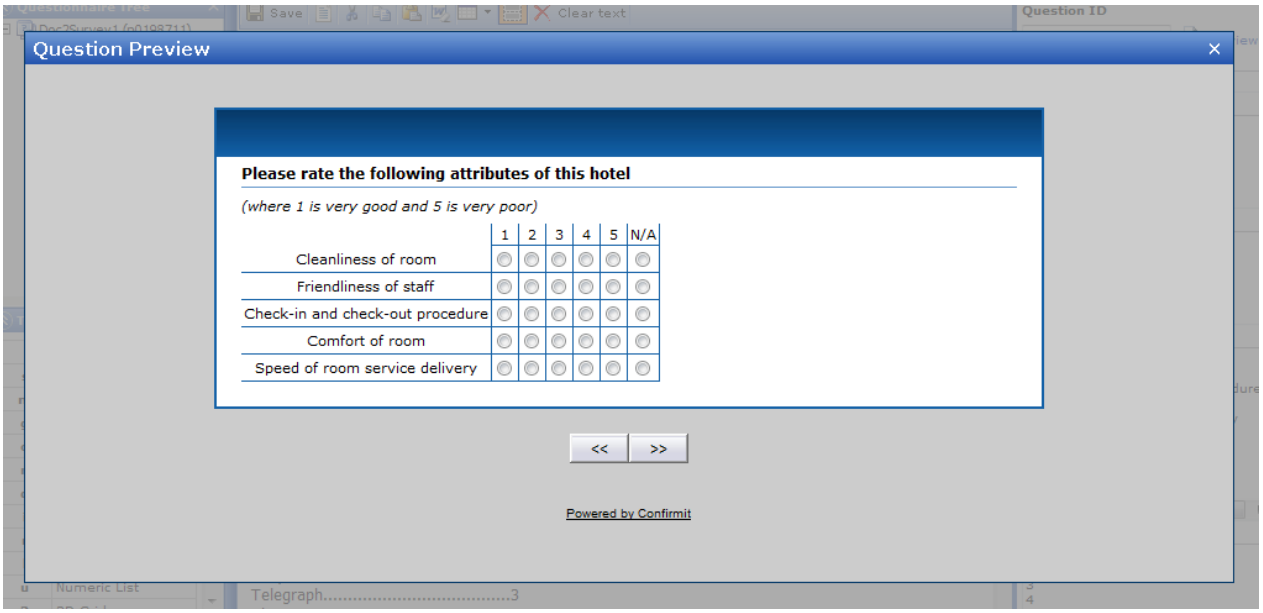


Figure 221 Previewing the Grid question

7.2.6. Editing Texts in Doc2Survey

When you have copied a Word document into the Doc2Survey Editing page, you can edit the text as necessary in both WYSIWYG and HTML format. You can add and delete, copy and paste, and create tables. Note that the editing functionality is limited (for example there is no possibility for formatting the text), because all formatting etc. is removed anyway before the text is used in the questionnaire.

Note: The Questionnaire Tree and the Question Details columns are synchronized; changes made to one will be reflected in the other. The central Editing area however is independent; it is not synchronized with either of the two side columns or any texts in the survey. So changes made to the text in the Editing area will have no affect on any text that might be in the Question Details fields or the survey itself.

When unsaved changes exist in the text in the Editing area, the **Save** button will flash - click the button to save the changes. A maximum of 5mb of text can be saved. In the event the text that has been copied into the editing area comprises more than 5mb, only the first 5mb will be saved and a message will be displayed informing you of this. Note that any text remaining in the central text editing area when you close the Doc2Survey window will be saved with the survey and will be available to any user who edits the survey.

To permanently remove all text from the Editing area, click **Clear Text**. Once this button is clicked, if you later find you need some of the text you will have to re-copy it from the original Word document.

7.2.7. How to Create a Predefined List

When you are working with Doc2Survey, you can easily create reusable lists.

1. In the Editing area, select the answers that you wish to create the predefined list from.
2. Click the **Create a reusable scale/list** button, or press the **P** key on your keyboard.

   The details for the predefined list component are displayed in the column to the right of the Editing area, and the list component is added to the Questionnaire Tree.

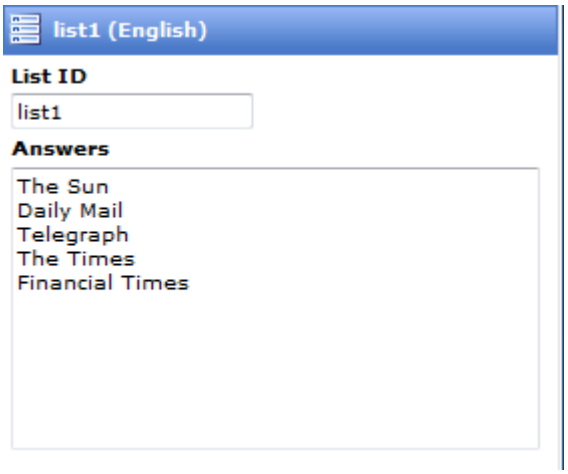


Figure 222 Example of a reusable list

When you have selected a question, you can now assign the predefined list as answer or scale.

When you are creating a predefined list, press the **Shift+P** keys to automatically assign the predefined list being created to the question that was previously loaded.

Note: It is not possible to mix regular (individual) answers and predefined lists in a question; a question can use only pure answer lists or one predefined list.

Once several predefined lists have been created, press **Ctrl+1** to automatically assign the first reusable list to the selected question, press **Ctrl+2** to add the second list etc. (up to **Ctrl+9**).

7.2.8. Adding Different Languages in Doc2Survey

If your survey is to be available in more than one language, you can easily add text to questions in other languages than the default using the Doc2Survey functionality.

1. Click the down-arrow beside the Language field located towards the center of the lower frame of the Confirmit window.

   The drop-down lists all the languages currently selected for this survey (see Creating a New Survey on page 202 for more information).

2. Select the language you wish to work in.

   The Title, Text and Answers fields in the Question Details column will be emptied (assuming nothing has previously been added in the selected language). You can then import a Word document in the appropriate language (see How to Import a Word Document into the Doc2Survey Functionality on page 209 for more information) and proceed with copying the translated texts etc. into the questions.

7.3. The Active Languages Page

This page lists all the languages selected for a multilingual survey. You can work with up to five languages at one time. Select and deselect the languages you wish to work with at this time, by checking/unchecking the checkbox. Note that the maximum of five languages only refers to what you see whilst working in the Authoring system; the respondents will be able to select from all the languages selected for the survey.

7.4. How to Add New Objects to the Questionnaire Tree

There are two methods of adding new objects to the questionnaire:

- **Drag and drop** – drag objects from the New Objects toolbox, and drop them into the survey folder in the Questionnaire Tree toolbox (the survey folder is the top item in the Questionnaire Tree toolbox). Once an object is created in the tree, you can drag it to the desired location.

For example, if you click on the **Single** object in the New Objects toolbox to select it, then drag it from New Objects into the survey folder and drop it there, a new single question will be inserted as the first question in the survey.

- **Right-click the destination** – right-click on the destination for the new object (the survey icon, folder or the object after which you wish to place the new object), then select **Insert > (Inside)** or **Insert (After)** (depending on the type of object you have clicked on) and choose the required object-type. The new object will be placed after or inside the destination object.

After you have inserted an object into the tree, it will appear in the tree as a new icon. To open the object for editing, double-click on it or right-click on it and choose **Edit** or **Properties** from the menu. **Edit** will open the Details page for the object (the same effect as double-clicking), while **Properties** will open the Details page and also the Properties pane. Note that you can open and close the Properties pane for a Details page by clicking the **Show/Hide Properties** button in the Details page toolbar.

Note that when editing a question object, clicking to a different tab will automatically save any changes you have made to the object.

7.4.1. The Object Types

All the objects that you can add to a questionnaire are stored in the New Objects toolbox.

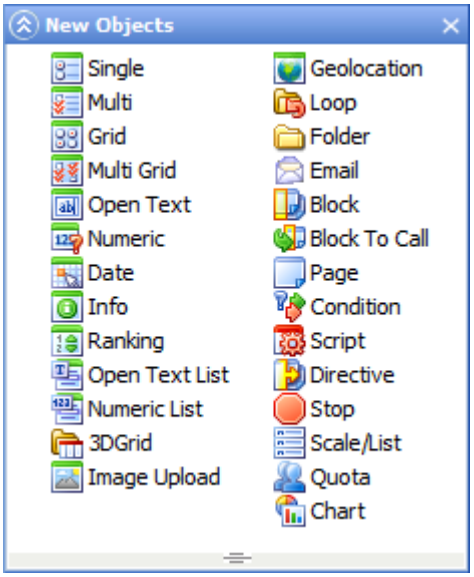


Figure 223 The objects available in the New Objects toolbox

The actual question forms that will be seen by the respondent are those in the left column, while the remainder enable you to set up the questionnaire to function as you wish.

The forms are as follows:

- **Single** – Single-answer question. The respondent can select one answer from a list (see The Single Object on page 219 for more information).
- **Multi** – Multi-answer question. The respondent can select several answers from a list (see The Multi Object on page 220 for more information).
- **Grid** – A question type that lets the respondent evaluate a list of variables along a scale (see The Grid Object on page 221 for more information).
- **Multi Grid -** a 3D-grid object in which the Multi questions comprise the rows of the grid rather than the columns (see The Multi Grid Object on page 222 for more information).

- **Open Text** – A question type that allows the respondent to type in his or her response using "free text"(see The Open Text Object on page 224 for more information).
- **Numeric** - A question type that allows the respondent to type in numerical answers (see The Numeric Object on page 224 for more information).
- **Date** - A question type that allows the respondent to input a date as the answer (see The Date Object on page 226 for more information).
- **Info** – Used for information pages in the survey (see The Info Object on page 227 for more information).
- **Ranking** - A question type that allows the respondent to rank a list of options, for example to place them in order of preference (see The Ranking Object on page 227 for more information).
- **Open Text List** - A question type that allows the respondent to type 'free text' against a list of options, for example to add comments to a list (see The Open Text Object on page 224 for more information).
- **Numeric List** - A question type that allows the respondent to add numerical answers to a list of options (see The Numeric Object on page 224 for more information).
- **3DGrid -** A folder object which allows you to combine various question types into one object with a grid layout (see 3D Grid on page 293 for more information).
- **Geolocation** - Used to capture the longitude and latitude values (the global location) of the respondent's browser (see The Geolocation Object on page 232 for more information).
- **Image Upload -** Allows respondents to upload an image as the answer to a question (see The Image Upload Object on page 232 for more information).

Note: When CATI Survey is selected in the Survey Settings > Survey Channels tab, an additional "Telephony" object becomes available in the New Objects toolbox. Refer to the CATI Supervisors manual for further information on this object.

7.4.1.1. The Single Object

In a Single question, the respondent can select only one answer from a list of suggested answers. Examples of use could be asking for the respondent's gender or age group. In theory, the answer list can be of any size, however Confirmit recommends a maximum of 200 answers in the list. In the event you require more than 200 answers then you should use Database Designer (see Database Designer on page 399 for more information).

In the Questionnaire Tree toolbox, the object looks as shown below. In this case the object is being used to elicit the respondent's gender.



Figure 224 A Single object in the Questionnaire Tree

The list of answer options can be presented to the respondent in the form of a labeled list of radio buttons, or as a drop-down list from which he/she can select one option.

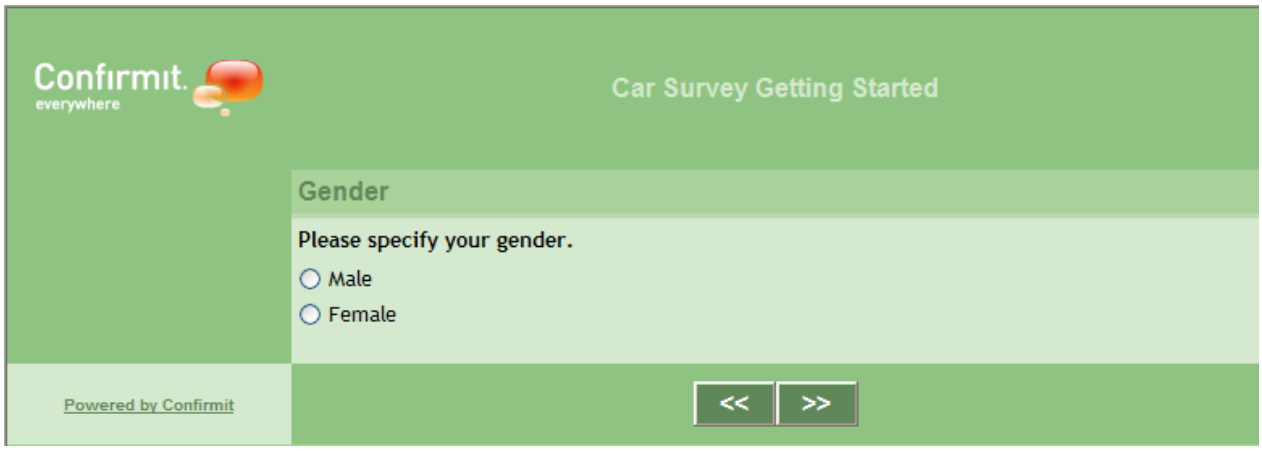


Figure 225 Example of an answer list in the form of radio buttons

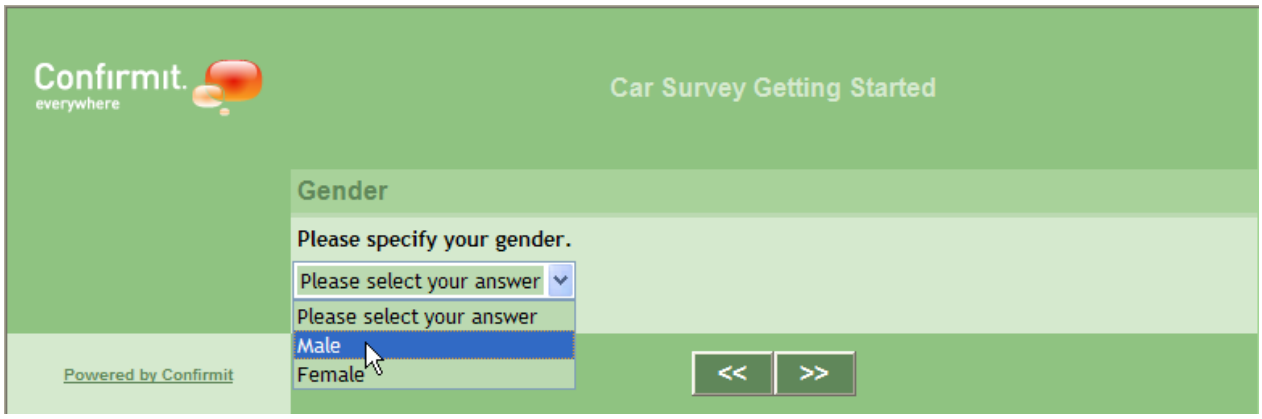


Figure 226 Example of an answer list in the form of a drop-down list

You can convert a Single question to a Multi if you need to; to do so right-click on the object in the Questionnaire Tree and select **Convert to Multi** (see The Multi Object on page 220 for more information). The various properties and settings available for this form are listed in the Properties page (see Question Properties on page 251 for more information).

7.4.1.2. The Multi Object

With a Multi question, the respondent can select any number of answers from the answer list. This could for example be the types of products he/she has tested or heard about. The answer list can be of any size.

In the Questionnaire Tree toolbox, the object looks as shown below. In this case the question is asking the respondent which cars he/she has test-driven.

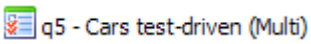


Figure 227 A Multi object in the Questionnaire tree

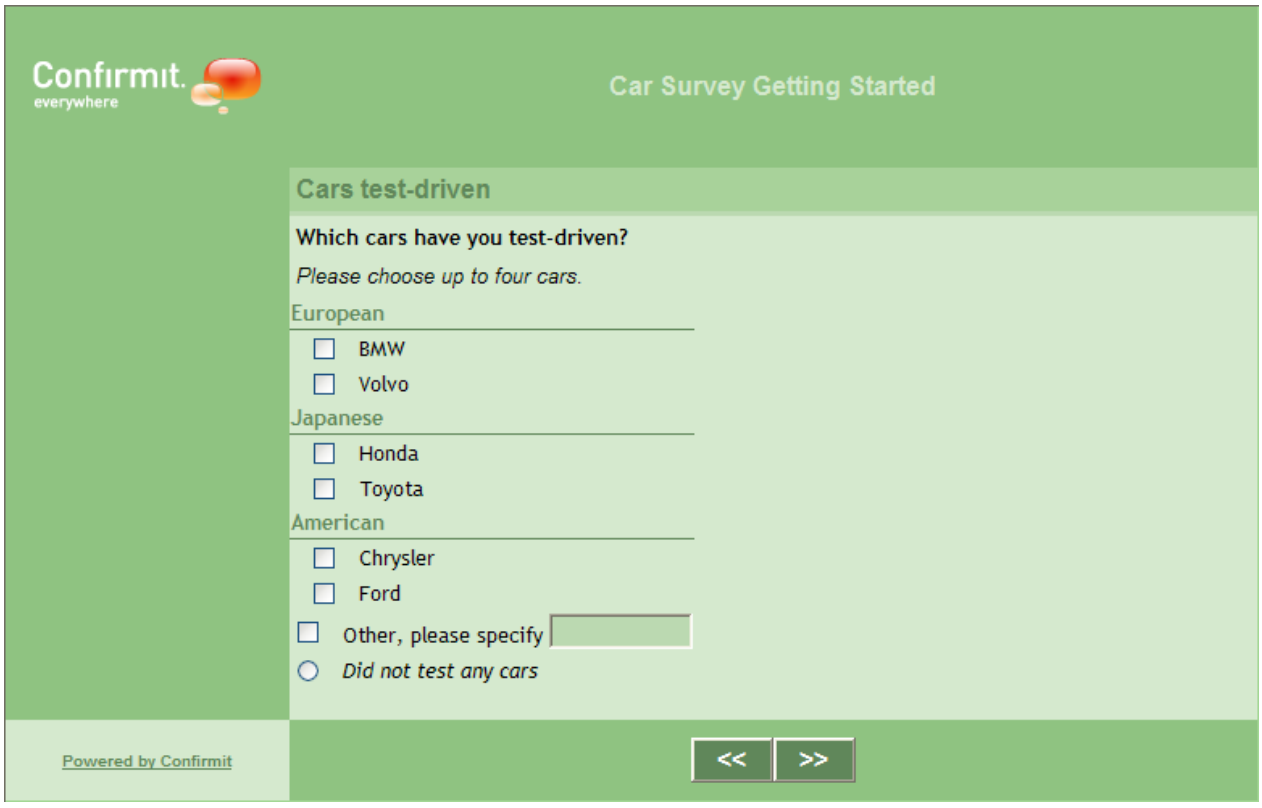


Figure 228 Example of a multi question as the respondent could see it

You can convert a Multi question to a Single, Ranking, Open Text List or Numeric List if you need to; to do so right-click on the object in the Questionnaire Tree and select **Convert to**. The various properties and settings available for this form are listed in the Properties page (see Question Properties on page 251 for more information).

7.4.1.3. The Grid Object

A Grid question is a question in tabular format, where the respondent can select an answer from a scale. This type of question is typically used to give products or statements a rank or score. In the Questionnaire Tree toolbox, the object looks as shown below. In the example, the question is asking the respondent to grade a number of properties for importance .

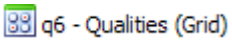


Figure 229 A Grid object as it appears in the Questionnaire Tree

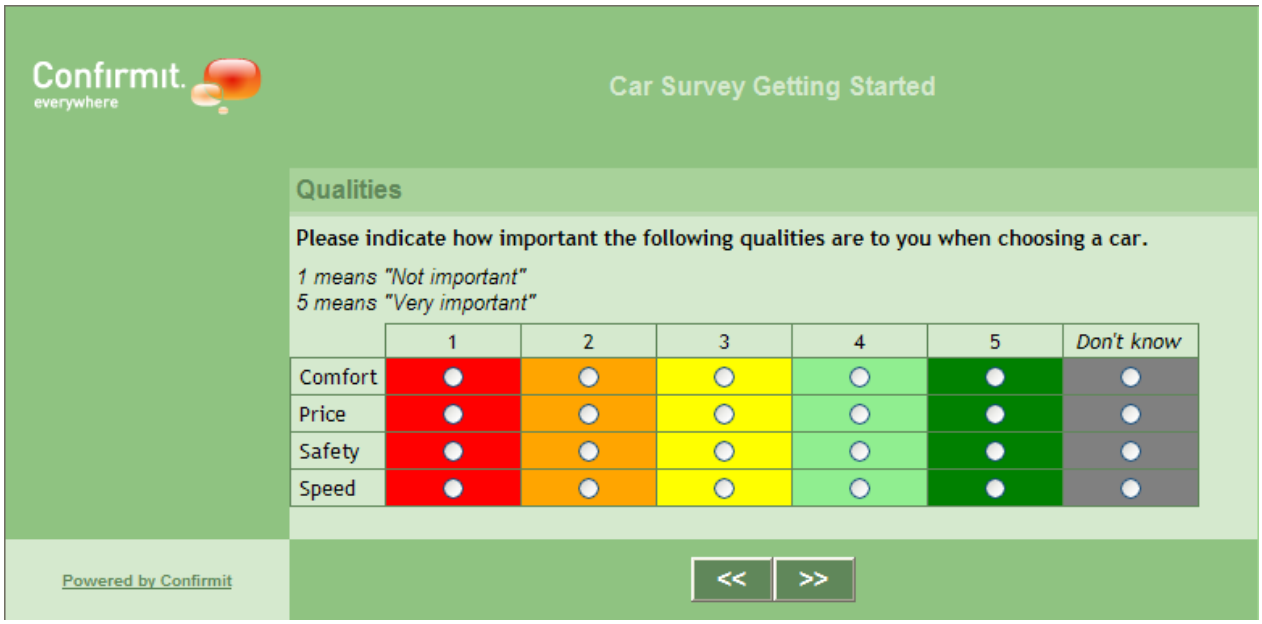


Figure 230 An example of a Grid question with the standard tabular layout

The various properties and settings available for this form are listed in the Properties page (see Question Properties on page 251 for more information).

You can allow the respondents to select an answer option in the grid by clicking within a grid cell area rather than having to click exactly on a button, and you can change the color of selected grid cells (go to Cell - area Click for Grid under The layout Tab Properties for more information.

Settings in the Advanced WI Features tab (see The Advanced WI Features Tab on page 258 for more information) allow you to change the layout of the form to Grid Bars (see Grid Bars on page 264 for more information), Card Sort (see Card Sort on page 262 for more information) or Slider (see Slider on page 262 for more information).

A variation of the Grid object is the 3D-Grid (see 3D Grid on page 293 for more information).

7.4.1.4. The Multi Grid Object

The standard 3D-grid object has multi questions as the columns. It is therefore normally inadvisable to use the standard 3D-grid in surveys that are intended for mobile responses, as the rendition may cause problems for the respondent.

The Multi Grid object is a 3D-grid object in which the Multi questions are the rows of the grid – it is effectively a transposed 3D-grid. The Multi Grid object is supported in all rendering modes; desktop, mobile, CATI and CAPI. The Multi Grid object is available to Standard users and can be added/edited in Doc2Survey. In the Questionnaire Tree toolbox, the object looks as shown below.

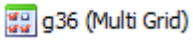


Figure 231 A Multi Grid object as it appears in the Questionnaire Tree

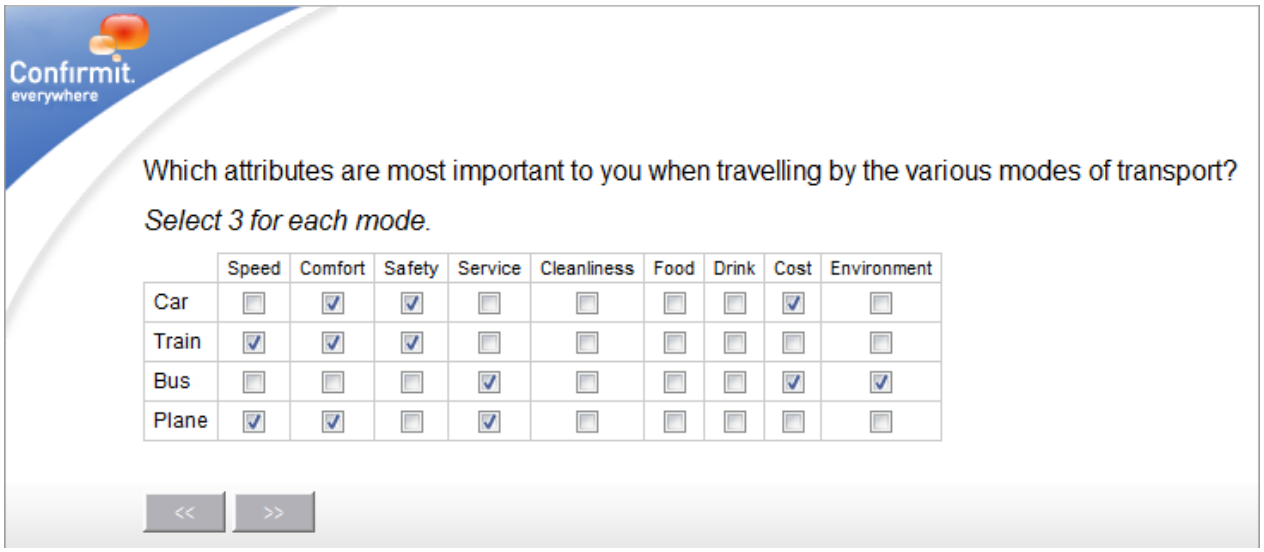


Figure 232 Example of a Multi Grid in use

The various properties and settings available for this form are listed in the Properties page (see Question Properties on page 251 for more information). Note that the question type is always “normal” and this cannot be changed. This means that a Multi Grid cannot be set to for example Hidden or Background.

Outside of Authoring, (in Reportal, Data Editing/Exporting, Data Processing etc…) this node appears as a clickable node that expands to the individual multi questions contained within the grid. There is no special handling of the Multi Grid question types in Reportal; it behaves the same as a 3D grid containing multis. From a data perspective, Multi Grids are treated as a set of individual multi questions.

The naming convention used for the labeling is:

Multi Grid question id + underscore + code in the “questions” list.

For example; if the Multi Grid is “g1”, the underlying multi questions in the multi grid are “g1_q1”, “g1_q2”, “g1_q3” etc. and the answer codes are 1, 2, 3, etc. then the columns in the database for the individual answers will then be:

g1_q1_1, g1_q1_2, g1_q1_3 …

g1_q2_1, g1_q2_2, g1_q2_3 …

g1_q3_1, g1_q3_2, g1_q3_3 … etc.

The Multi Grid object supports the following question/answer properties and options:

- Order of the questions/answers (rows/columns)
- Keep position for questions (rows)
- Exclusive answers (columns)
- Other answers (these appear in the column headers)
- Answer buttons (Advanced WI setting)
- Column, row and question masking
- Can be used in the condition builder
- Repeat headers (entry of answer Others is only possible in the first header row)
- Bottom headers (entry of answer Others is only possible in the first header row)

The following functionality is not supported:

- Answer group support
- Loop reference lists

7.4.1.5. The Open Text Object

An Open Text question is a “free text” field - it provides the respondent with a text field into which he/she can type any answer. This type of question form would be used when asking the respondent for comments or explanations.

In the Questionnaire Tree toolbox, the object looks as shown below. In this case the object is being used to elicit the respondent's name.

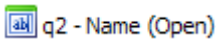


Figure 233 An Open object in the Questionnaire Tree

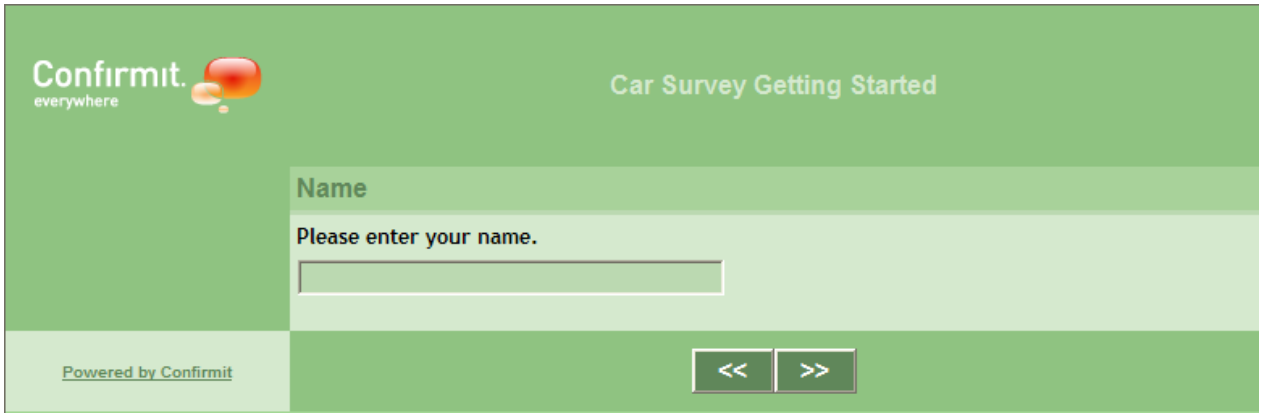


Figure 234 Example of an Open question

You can convert an Open Text question to a Numeric question if you need to; to do so right-click on the object in the Questionnaire Tree and select **Convert to**.

A variation on this question type is the Open Text List object. This object provides the respondent with a list of answer options, and allows him/her to type 'free text' into a text field beside each option. This can for example be used to ask for comments on a number of related items. An Open Text List question can be converted to a Single, Multi, Ranking or Numeric List question; right-click on the object in the Questionnaire Tree and select **Convert to**.

The various properties and settings available for these forms are listed in the Properties page (see Question Properties on page 251 for more information).

7.4.1.6. The Numeric Object

A Numeric question is a “free text” question with a text field for numeric answers (non-numeric characters are not accepted). This type of question form could be used for example when asking the respondent for a value or a quantity.

In the Questionnaire Tree toolbox, the object looks as shown below.

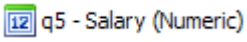


Figure 235 A Numeric object in the Questionnaire Tree

In this case the object is being used to elicit the respondent's salary.

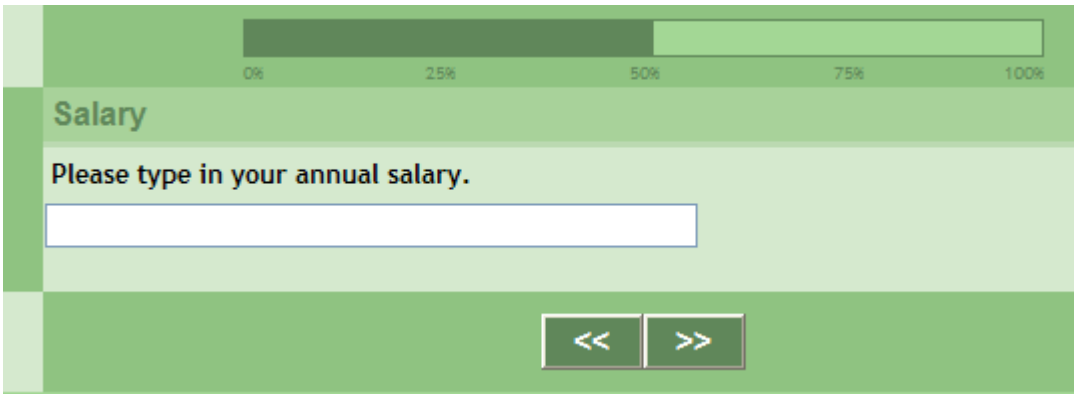


Figure 236 Example of the Numeric question

You can convert a Numeric question to Open or Date if you need to; to do so right-click on the object in the Questionnaire Tree and select **Convert to**.

A variation on this question type is the **Numeric List** object. This object provides the respondent with a list of answer options, and allows him/her to type numeric information into a text field beside each option. This could for example be used to ask for values for a number of related items, such as previous salary rates as shown below.



Figure 237 Example of a Numeric List question

You can convert a Numeric List question to a Single, Multi, Ranking or Open Text List. To do this, right-click on the object in the Questionnaire Tree, select **Convert to**, then select the question type you require.

The various properties and settings available for these forms are listed in the Properties page (see Question Properties on page 251 for more information).

Note: For Numeric and Numeric List nodes, the default Column width of the respondent's input box is calculated from the constraints placed on the node by the max/min/decimals/total digits property settings (see The General Tab on page 251 for more information). If the max/min/decimals/total digits settings are altered then the default setting will be updated automatically when the survey is launched. The default setting will be overridden if you type a specific value into the Column field.

7.4.1.7. The Date Object

A Date question provides the respondent with a field specially designed to hold a date. This could be used for example to ask for the respondent's date of birth, the date of a particular event etc.

In the Questionnaire Tree toolbox, the object looks as shown below.

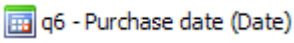


Figure 238 A Date object in the Questionnaire Tree

In this case the object is being used to discover when the respondent made a particular purchase.

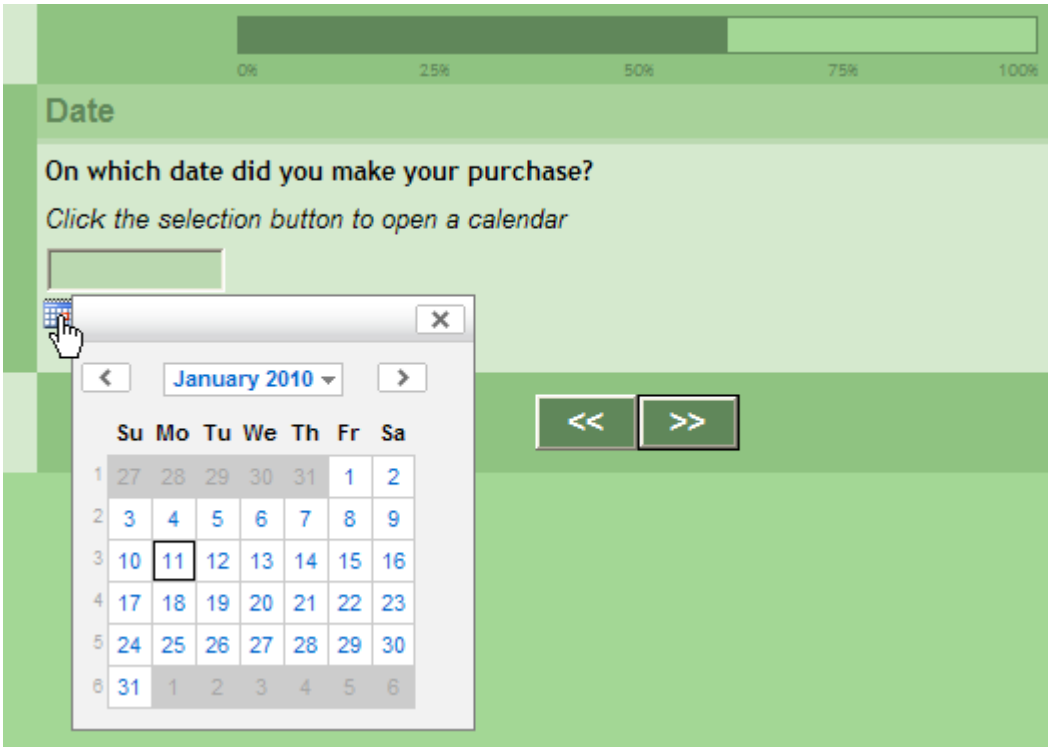


Figure 239 Example of a Date question in use

When the respondent clicks on the button below the date field, a calendar opens enabling him/her to select the desired date. This ensures the format of the date input is correct.

Note: The format of the date displayed in the input field when the date picker has been used will depend on the standard format used in the language selected for the survey. For example, if the survey language is English (United Kingdom), the format is DDMMYYYY, while if English (United States) is chosen, the format is MMDDYYYY.

You can convert a Date question to Open or Numeric if you need to; to do so right-click on the object in the Questionnaire Tree and select **Convert to**.

Note: When a date object is used in a survey, it will be available (as all other objects) in the survey data. When editing the respondent data you will be able to select the date as a column and search for respondents based on the date.

7.4.1.8. The Info Object

The Info object is used to display information text to the respondent. Typical uses would be to welcome the respondent to the survey, thank them for participating, or explain different survey sections.

In the Questionnaire Tree toolbox, the object looks as shown below. In this case the object is being used as a Welcome page.

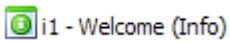


Figure 240 A Welcome Info object in the Questionnaire Tree

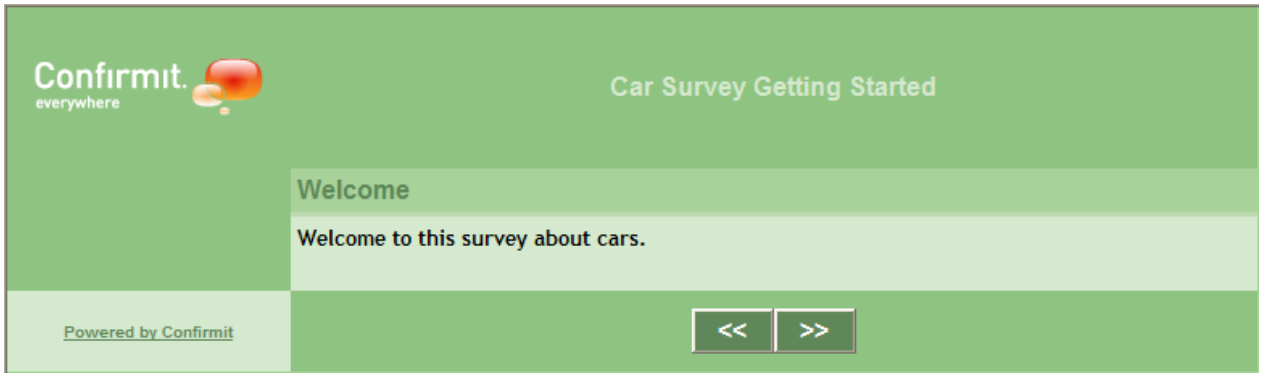


Figure 241 Example of an Info page as the respondent might see it

This object has Text, Masking, Preview and Languages tabs (see Editing a Form on page 234 for more information).

7.4.1.9. The Ranking Object

A Ranking question presents the respondent with the list of answer options which they are asked to rank or grade, giving the answers a score from 1 to the total number of answers.

Note: A Ranking object cannot be made "required".

In the example below the respondents are asked to rank the list of cars. In this case they must type 1 into the box beside the car they liked the most, 2 into the box beside the car they thought was second-best, and so on until they have typed 8 into the box beside the car they liked the least. The ranking must be indicated using numbers, the numbers must start from 1, and they must be consecutive.

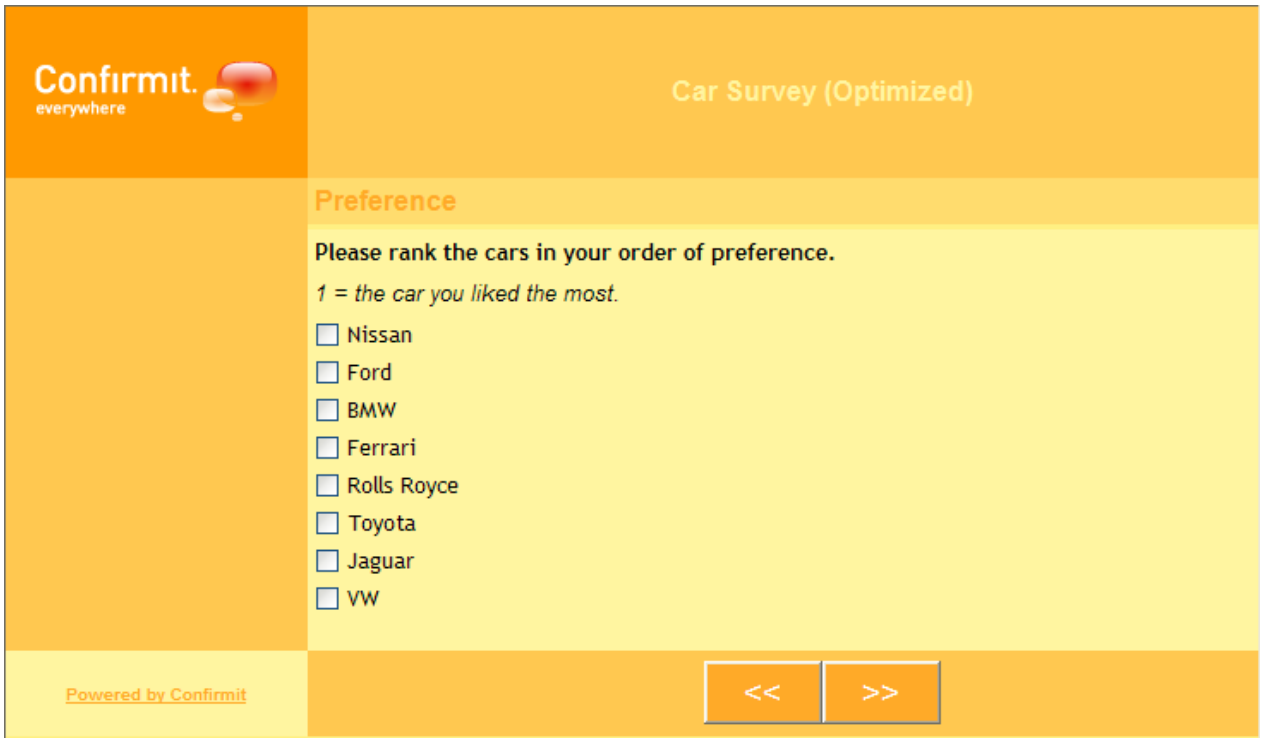


Figure 242 Example of a Ranked multi

You can convert a Ranking question to a Single, Multi, Open Text List or Numeric List if you need to; to do so right-click on the object in the Questionnaire Tree and select **Convert to**.

7.4.1.9.1. Drag-n-Drop Ranking

In a Ranking question's Properties page, the Advanced WI Features tab includes the Drag-n-Drop Ranking option (see The Advanced WI Features Tab on page 258 for more information). This changes the layout of the list, presenting it as two columns. The column on the left is the list of items that are to be ranked, and the column on the right is the "finished" ranked list.

Note that this option is only available if Rank by Click is not selected.

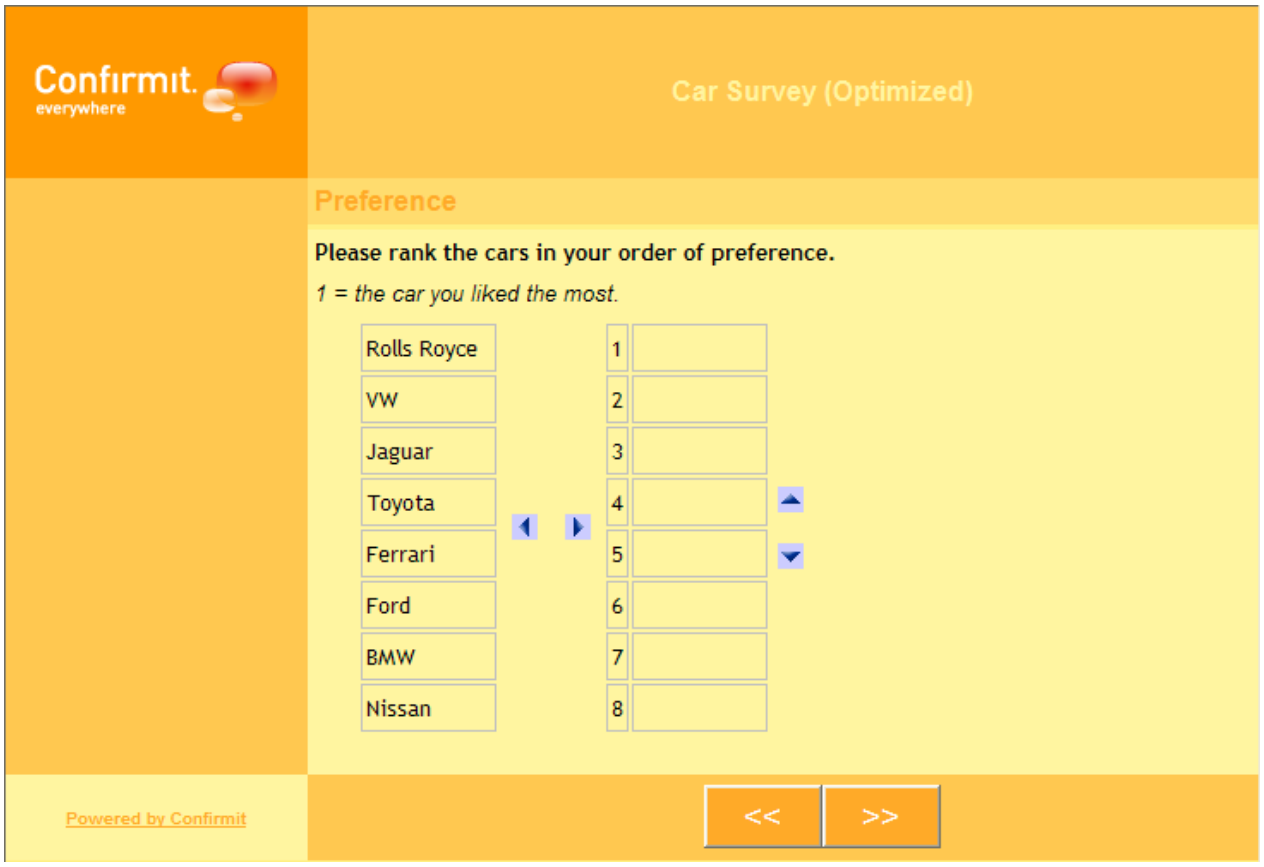


Figure 243 The same ranked multi but using the Drag-n-Drop option

Now, instead of the respondents having to click into the boxes and type the appropriate numbers, they can drag a car from the list on the left and drop it into the desired numbered box in the column on the right. The objects can be dragged in any order, and they are moved rather than copied so there is no possibility of repeat entries in the "ranked" column. The respondent can also move the objects by first clicking on them in the list on the left to select them, then clicking the **>** arrow button. In this case the objects fill the "ranked" column from the top down. However once an object has been moved into the "ranked" column, it can be moved up and down in the list, either by dragging or by clicking the up and down arrow buttons.

Note that you can replace the arrow button images with your own customized images (see Overriding the Button Images on page 231 for more information).

Note: When using right-to-left (RTL) languages, the > and < buttons are automatically reversed.

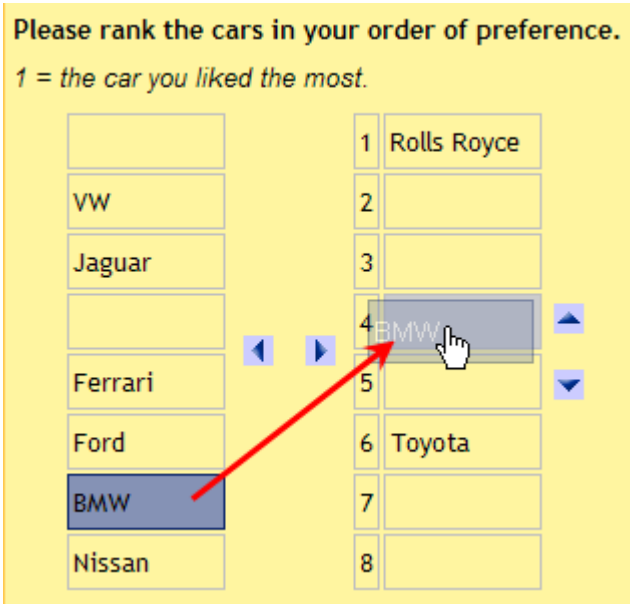


Figure 244 The items in the process of being ranked

Once the respondent has moved all the items into the column on the right, and is happy with the order, he/she clicks **>>** / **Next** in the normal manner to move on to the next question.

7.4.1.9.2. Rank By Click

In a Ranking question's Properties page, the Advanced WI Features tab includes the Rank by Click option (see The Advanced WI Features Tab on page 258 for more information). This presents the list as one column, and allows the respondent to merely click in the boxes in the desired order. The appropriate rank number will be placed in the box as the respondent clicks.

Note that this option is only available if Drag-n-Drop Ranking is not selected.

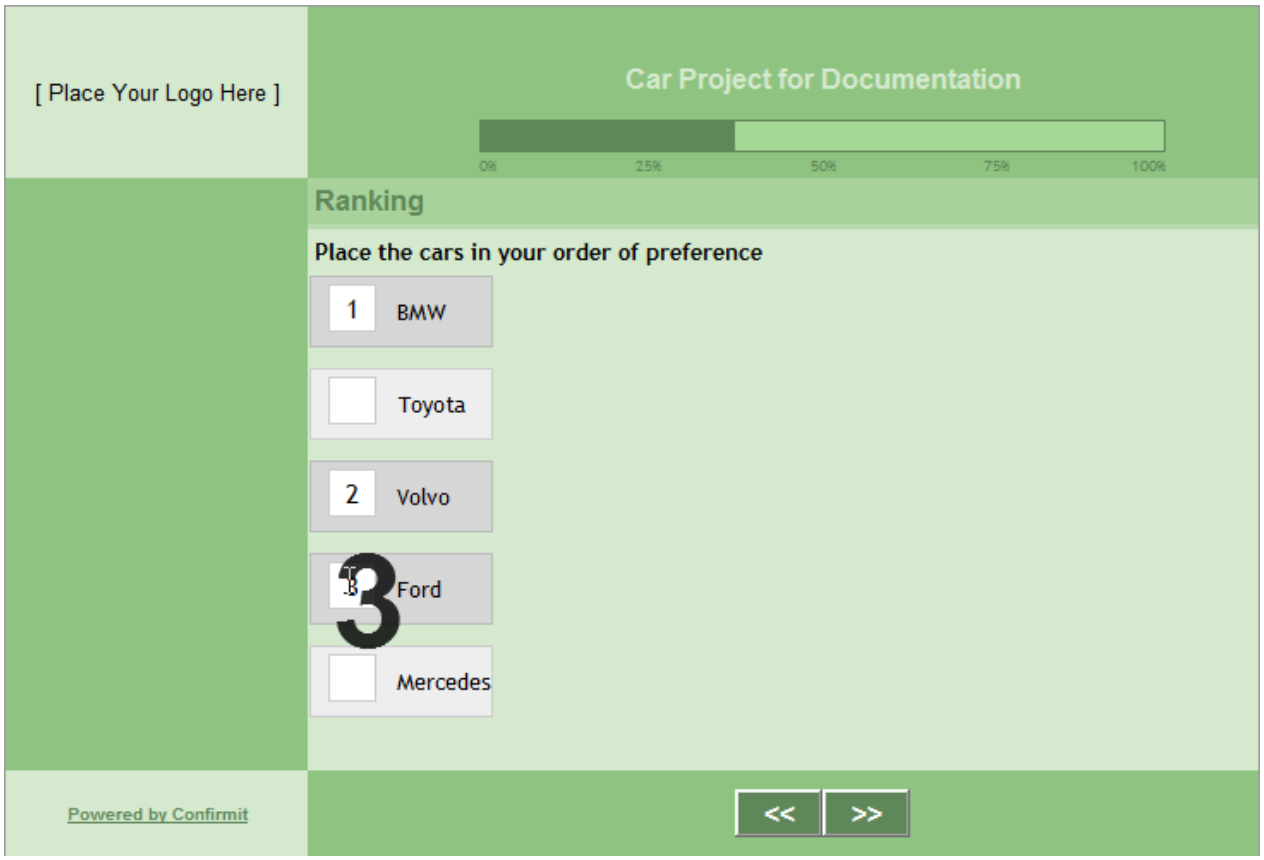


Figure 245 Using the Rank by Click functionality

If the respondent changes his/her mind and wishes to change the ranking order, they click again on the box containing the error and that ranking number is removed. The sequence of selections is remembered, and any remaining ranked boxes are then re-numbered to take into account the rank of the box that was de-selected.

Note: For interviewers using the CAPI system, the animation/transition functionality is not available.

7.4.1.9.3. Overriding the Button Images

The button images in the Ranking question (default is arrows) can be overridden using styles. To do this:

1. Upload the custom images that you wish to use to the File Library (see File Library on page 157 for more information).
2. Create four new HTML styles with the type "Class", using the names:
    - confirmit-rankedorder-add
    - confirmit-rankedorder-remove
    - confirmit-rankedorder-up
    - confirmit-rankedorder-down
3. For each style, add the link to your custom image (in the File Library) as the Background Image URL.

Note that if your custom images differ in size from the default images, you will also need to adjust the height and width (under Position) for each style accordingly.

7.4.1.10. The Geolocation Object

Important
From Chrome 50, Chrome no longer supports obtaining the user's location using the HTML5 Geolocation API from pages delivered by non-secure connections. This means that any survey not running on https will not be able to use the Geolocation functionality in Chrome. Confirmit recommends that https is used for all surveys. The ability to enforce https access to the survey is controlled from survey settings, and can be enforced at the company level (contact your system administrator).

Note:
1) To capture this data, a minimum of Internet Explorer 9, Firefox 3 or any WebKit-based browser is needed.
2) For respondents using Internet Explorer, the survey layout must use the newest available version of Internet Explorer rendering. Existing layouts will be rendered as Internet Explorer 7 compatible html, and in this mode geolocation functionality is not available. To avoid the Internet Explorer 7 compatibility checkbox, the "Use newest available version of IE rendering" should be checked in the Survey Layout's theme property (in SurveyPageMasterSheet).

The Geolocation node is used to capture the longitude and latitude values (the global location) of the respondent's browser. This object is available for both normal (full professional) and standard users, and is added to the questionnaire tree in the normal manner.

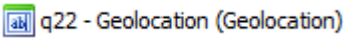


Figure 246 A geolocation node in the Questionnaire Tree

The location data is retrieved from the respondent's browser client geolocator object. When the respondent passes the geolocation object in the survey, the respondent will normally be requested to confirm that the web page is allowed to access this location data (this request is beyond Confirmit's control and it cannot be disabled). The respondent must confirm the access before the data can be copied. If the respondent refuses access, or if JavaScript is disabled, the geolocation data value for this respondent will be blank.

The Geolocation object acts basically in the same way as a "hidden" question, but in this case the object must go to the respondent's browser to gather the information (normal hidden questions do not do this). The object will be "carried" to the browser by attaching itself to the next interactive question that is sent (that is, the next form collecting interactive data, for example a single, multi, numeric etc...). The location data will therefore only be submitted to the server when the page carrying the next interactive question is posted back to the server. In the event the next interactive page is some distance later in the survey, the respondent may have left the survey, been screened for some reason etc. before the location data is returned, and the data will then be lost. It is therefore recommended that a Geolocation object is placed on the same page as the next interactive question.

You can add a question text to a Geolocation node. Then, if the Geolocation node is followed by something that results in a page break appearing before the next interactive question, the node will act as an "Info" node and will display the node's question text along with the Confirm and Deny buttons.

In the Random Data Generator, Geolocation nodes will be assigned random data within the valid geopoint coordinate range. Reporting and Rapid Results will treat this node as if it were an Open Text node.

Note that the Geolocation object has the following limitations:

- It is not supported by Panels.
- It is not supported by the Doc2Survey functionality.

A geolocation node value for a respondent cannot be edited, and the node will not be visible in the left tree view under **Survey Data > Edit** (see Edit Survey Data on page 785 for more information). The value can however be viewed in the Edit page's lower-right frame once the respondent has been selected.

7.4.1.11. The Image Upload Object

The Image Upload object allows respondents to upload an image as the answer to a question. Note that the object will only accept image files.

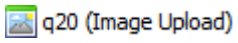


Figure 247 An image Upload object in the Questionnaire Tree

Set up the question title and text as for any other question.

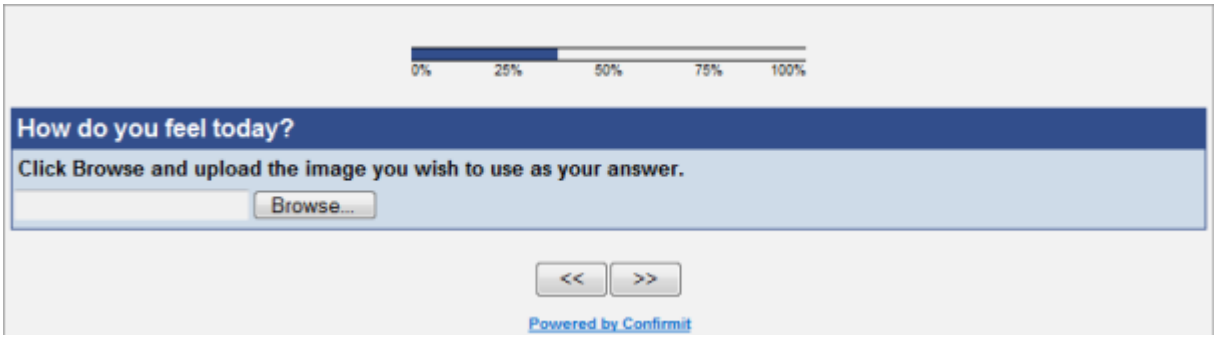


Figure 248 Example of a question asking the respondent to upload an image

The respondent can then browse to the image he/she wishes to upload. Photos can only be uploaded on supported devices and browsers. The maximum size of an image file that can be uploaded is 1024kb, with dimensions 1280 x 1280 pixels, maintaining the aspect ratio. These limits are configured for the Confirmit installation so can be changed, and are set so that respondents don't experience delays.

Only one file can be uploaded in an object. If the respondent attempts to upload a second file, the first will be overwritten. Note that when the respondent can see the thumbnail image in the question form, the image is finished uploading. The image is uploaded to the server on which the survey is located.

Note that a number of restrictions apply:

- This functionality is not supported for Internet Explorer versions less than 10.
- This functionality is not supported on Windows phone devices.
- The Image Upload question type is never mandatory.
- No scripting check is run to check whether the device is supported, and there is no fallback mode.

To view the images that respondents have sent, export the survey data as "Delimited text file" and in the second step of the process, in the Export dialog, select to Include Uploaded Media Files.

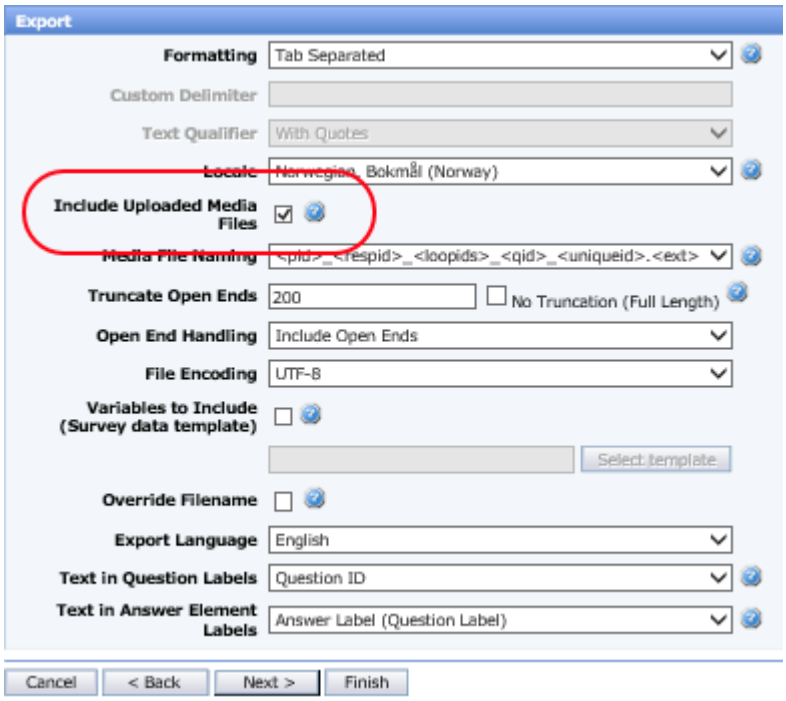


Figure 249 Including media files in the data export

When this option is selected, images, photographs or videos captured as upload question types will be included in the generated exported file. This option is only available for delimited file exports. The media filenames are the same name as that stored in the data record for that question. In the event a large number of images are to be exported, FTP delivery should be used.

Note: If you are using the required version of Internet Explorer (as described in the System Requirements section (see System Requirements on page 11 for more information)) but your browser is emulating an earlier version, the Image Upload functionality will not work. In this case you must enable the "Use newest available version of IE rendering" property in the theme that you are using.

7.4.2. Read-Only Access to a Survey

If a user has Read-only access to a survey, the **Save** and **Delete** buttons will be inactive on the **Survey Management > Overview** page and only the General and Active languages tabs will be displayed.

7.4.3. Editing a Form

To edit a question form, either double-click on the question's icon in the Questionnaire Tree, or right-click on the icon and choose **Edit** or **Properties** from the menu that appears. All these methods open a Question Details page on the right side of the Confirmit window, while clicking Properties also opens the Properties pane (see Question Properties on page 251 for more information). The Question Details page consists of several separate pages, described below. Click the tabs along the top of the frame to access the different pages. Information is saved whenever you move to a new page (you click on one of the tabs).

The toolbar across the top of the Question Details page contains the tools required to edit the question and answer texts. Note that you can undo changes made to the question, either via the **Undo** button in the toolbar, via the designer log (see Designer Log on page 200 for more information), or by using the keyboard shortcut **CTRL+SHIFT+z**.

Note: If you have made modifications in one of the Question Details tabs and the next action will take place outside the Question Details frame, you must click Save to save the changes. Not all tabs are available for all question types.

7.4.3.1. Question ID

The Question ID is the survey-unique ID of the form (questions). This is an automatically generated, alphanumeric string with no white space, starting with a letter. You may replace the system-generated ID with your own. Note that the maximum length for question IDs is 50 characters.

Important
Do not use reserved keywords as question IDs (see APPENDIX C: RESERVED KEYWORDS on page 860 for more information).

The data is stored in the database with variable names constructed in the following fashion:

- **Single -** One column with a tag identical to the question id, and with answer codes as contents.
- **Open -** One column with a tag identical to the question ID, and the answer text is the content.
- **Multi -** One column per answer alternative. The tag equals the question id_code of the answer alternative. The contents are either 0 (not selected) or 1 (selected). For Open Text Multi questions the contents will be the entered text. For Ranked and Numeric Multi questions the contents will be the number answered.
- **Grid -** A column for each sub question (answers). The tag equals the question id_code of the answer alternative. The contents are the codes of Scales.
- **Other -** "Other: specify" in single, multi or grid questions is represented in data files in the following way: The tag equals question id_code_other. The contents will be the answer text.

To avoid unnecessary issues a number of points should be noted:

1. You do not have to change the default ID of a form, even if you introduce the form between other existing forms (for example at a late stage of the questionnaire construction). If you do change the ID, be very careful to give it a unique ID! For example, if you introduce a new form between forms q5 and q6, where q5 is a multiple question, do not label the new form q5_2 as this will already be the code for the second alternative in the original question q5.
2. If the survey uses the Optimized Database format (see The Optimized Database Format on page 38 for more information), then the use of the underscore character (_) in question IDs and codes is restricted (see Underscore Character Limitations in Question ID on page 236 for more information).
3. If you change a question ID when the survey is live, a new column is created in the database. However the old column will remain with its original name and any data that was gathered up to the point of the ID change. If a survey has been previously launched to production then it is not recommended to later reuse the same question ID for a different question type, or change the case of any characters in an existing question ID. Doing this can cause problems when exporting the data because the question in the database will still exist under the previous question ID. If you intend to relaunch the survey using the Create New Database option then this is not an issue because the database is created anew.

Warning!
If you change a qid when the survey is live then any data already gathered by that question may be lost. In this event the data will not be retrievable, even if the qid change is reverted.

4. A question ID cannot have the same ID as a weight model in the survey. If a question ID has the same ID as a weight model used in the survey, the weight model generation will fail and an error will be generated (see The Weight Model > Overview Tab Properties on page 731 for more information).

   These variable names will be used as column titles when survey data is exported to SPSS Excel, or ASCII Tab separated or comma separated files. For Fixed-width ASCII files, these variable names will be used in the definition file.

5. Restrict the length of the ID to 8 characters if you wish to use the ID as the column-name in SPSS when exporting data to this format. For multi-questions and grids, you should try to restrict the length to 5 or 6 characters depending on the length of the codes, because column names are constructed as follows:

   question id_code

   and this construction will quickly use up the 8-character restriction for column names.

6. Use **invalidResp** as the qid to exclude certain records from reporting, for example if you suspect the survey respondent has just provided random answers (see APPENDIX C: RESERVED KEYWORDS on page 860 for more information). See also the separate SmartHub User Guide.

7.4.3.1.1. Underscore Character Limitations in Question ID

When using the **Optimized Database format**(see The Optimized Database Format on page 38 for more information), Question-IDs and codes are allowed to contain the underscore (_) character, though with some restrictions.

If the underscore is used, a situation can easily arise where the system is not able to tell whether a database field belongs to one question type or another. For example, imagine the situation: You have collected data for the Single question called 'q1_5', then the survey is edited. During the editing process, this Single is deleted and a new Multi is created with the name 'q1'. If the Multi has more than five answer options, then one of the options will automatically be given the code '5'. You then have a serious problem - existing data from the old question q1_5 will be mixed with new, different data from the new question that is also called q1_5.

For this reason, for Multi and Grid questions that use a loop reference answer list (see Linking a Question to a Loop on page 245 for more information):

- You cannot use the underscore character in the question name (the question ID).
- You cannot allow any other variables to have a question ID starting with the name of the loop reference.

7.4.3.2. Text

Note: Click the Open in Survey Designer link to open Survey Designer in a new browser window and open the survey at the selected question. Refer to the separate Survey Designer User Guide for information on this application.

On this page, you specify the text of the form and other related information. If you work in two or more languages at the same time, there will be a separate set of fields for each active language (see Languages on page 250 for more information). Go to the Question and Answer Editing Modes section for information about the two editing modes for text fields and answers.

Field	Description
Title	The title of the form. The title appears in the routing-tree. It also functions as a heading for the form when used in a web-survey, and as a descriptive label for the form when used in Reportal. The length of the title can be maximum 255 characters, otherwise it will be truncated. When a title is not provided, Text will be used as a title. (In templates, you may use the primitive ^FTITLE^ where you want to insert this text (go to Templates for more information).
Text	The form text. (In templates, you may use the primitive ^FTEXT^ where you want to insert this text (go to Templates for more information).
Instruction	Use this field to give descriptive instructions or comments. (In templates, you may use the primitive ^FCOMMENT^ where you want to insert this text (go to Templates for more information).
Scratchpad	The scratchpad is a text editor, and is available in a number of the screens (see Scratchpad on page 316 for more information).

You can format the text layout (for example underline the text) by adding HTML codes directly into the text fields or answer cells in the HTML editor mode. In WYSIWYG editor mode you can format the text by using the tools in the toolbar.

You can copy and paste text directly from MSWord into the text fields. Note however that this copying process can take with it considerable amounts of unnecessary HTML formatting code, and this code will increase the file size and can create problems for later text formatting within Confirmit. Click the **Clean HTML...**button  to remove this unnecessary code. Note that this functionality will keep intact the majority of "desirable" formatting code, such as bold, italics, text color etc. This button is available on all WYSIWYG components such as the Theme Editor, Survey Layout Editor, Predefined lists etc.

You can add images into all text fields in a questionnaire (title, text, instruction and answers). For the Title, Text and Instruction fields, type or copy in the URL to the file you wish to use (see How to Include an Image in a Text Field in HTML Source Mode on page 165 for more information). For the Answer tab text fields, you can drag-and-drop images directly from the File Library (see How to Include an Image in WYSIWYG Mode on page 166 for more information). You can for example make a reference to an image by including the following tag in a text field's or an answer's cell:

<img src=" http://<URL_of_the_image>">.

To include a logo in a question when working in WYSIWYG editor, drag the logo into the text field or answer cell. You can also copy and paste the logo into the text field. In the figure below, the Confirmit logo has been dragged into the Text field of a question.

To delete an image or logo, click on it to select it (the frame grips appear around the logo), and press the **Delete** key on your keyboard

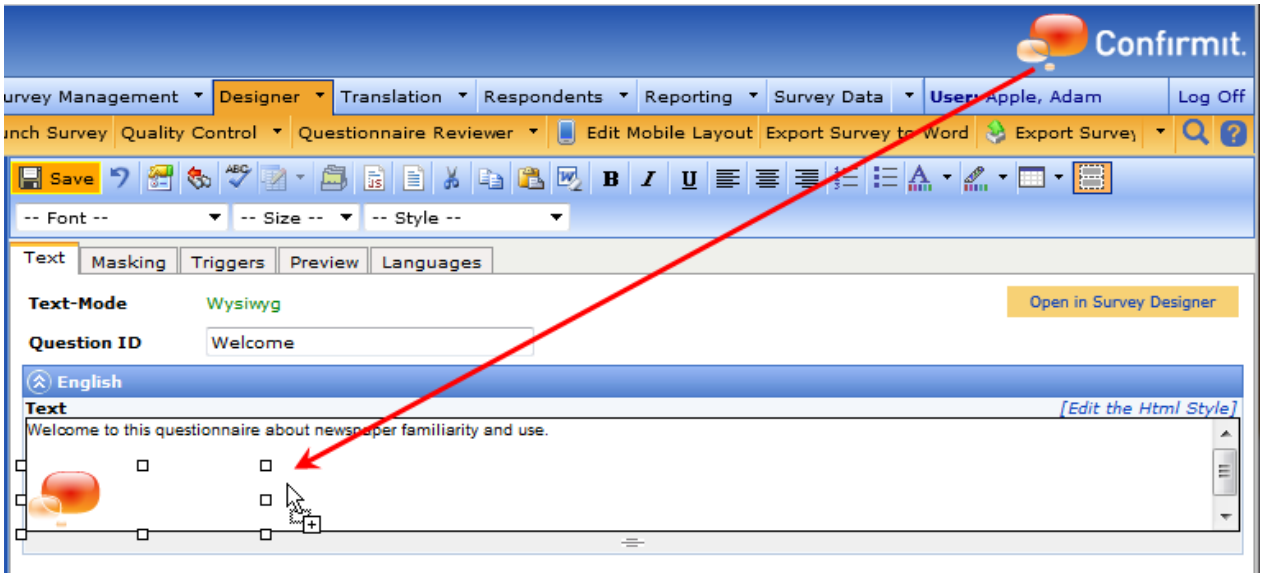


Figure 250 Dragging a logo into the text field

Note: When you run a survey from a secure site using HTTPS, and refer in the survey pages to images that are located in a non-secure site, the respondent will be presented with a warning on every page as follows: "This page contains both secure and non-secure items. Do you want to display the non-secure items?" To avoid this message, the images must also be placed on a secure site.

7.4.3.3. Answers

A list of answer options from which the respondent can select the desired answer to the question, is required for all question types except Info and Open questions. Use this tab to define the list of answers, or categories, for a question.

Note: If the questionnaire is using the Optimized database format (see The Optimized Database Format on page 38 for more information), then you can link an answer list from a loop into the question (see Linking a Question to a Loop on page 245 for more information). For multi questions you can also make the answer list searchable for the respondent - see below.

The main characteristics of an answer are its *text*, which is what the respondent or interviewer will see on the screen, and its *code*, which is the underlying code stored in the database (see Codes on page 240 for more information).

Note: This tab is not available for Info-objects and Open-objects.

The ActiveX answer list will be the default answer list if the user's browser supports ActiveX. If the user's browser does not support the ActiveX answer list, a warning will be displayed and the user will have two choices: to download the FlexiGrid component, or to switch to the DHTML answer list.

Note: ActiveX input mode supports long answer lists. However, if the answer list contains several hundred items, Confirmit recommends using the Table lookup functionality that Database Designer offers (see Database Designer on page 399 for more information).

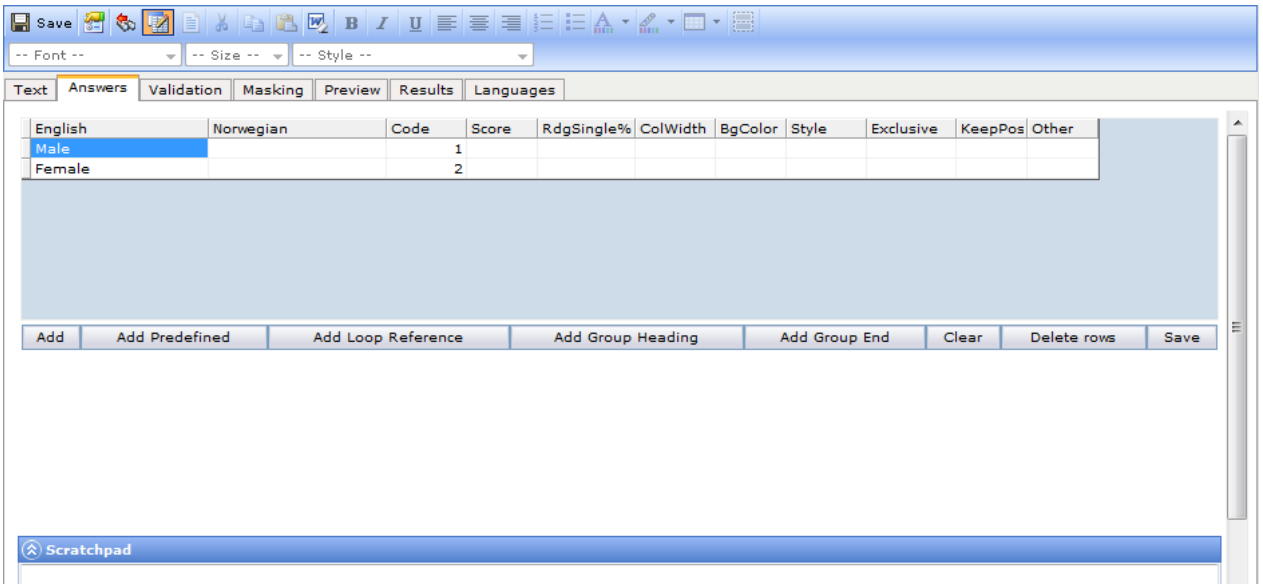


Figure 251 Example of an Answers page in FlexiGrid Component

In DHTML mode, one can also switch between the HTML and the WYSIWYG editors.

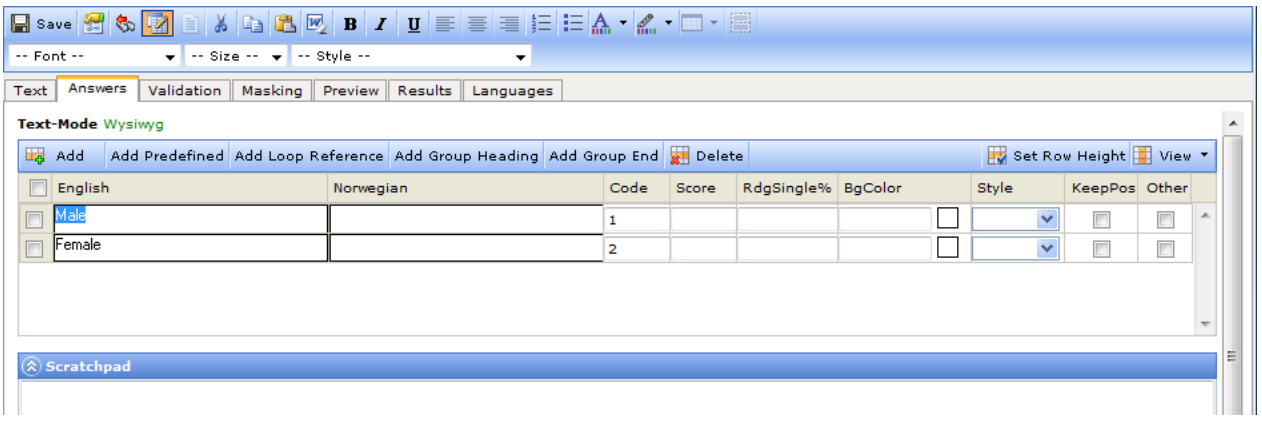


Figure 252 Example of the Answers page in DHTML input mode

Note: The DHTML input mode does not support long answer lists. The maximum number of items in this mode is 100. An error message will be displayed if you attempt to add more than 100 items to the list.

Note: For all questions where radio buttons or check boxes are normally used, such as single, multi and grid questions, you can replace the normal answer option format of button/box and text with images (see How to Use Images as the Answer Options on page 247 for more information).

If you are using the Optimized Database format (see The Optimized Database Format on page 38 for more information), and in the event the answer list for a Multi question is very long, for example hundreds of options, you can provide the respondents with the possibility to search the answer list so they can more easily find the answers they wish to use (see Searchable Answer Lists (Searchable Multis) on page 271 for more information). To do this, go to the Multi question's **Properties > Advanced WI Features** tab and check the **Searchable answer list** box (see The Advanced WI Features Tab on page 258 for more information).

7.4.3.3.1. How to Create a List of Answers

When the question is newly created, the list of answers will be empty. You now need to add the answers that you wish to be available to the respondent.

1. Click the **Add** button or press the **CTRL+N** keys on your keyboard to create a new answer row in the list.

   The cursor is located in the first column.

2. Type the desired answer option into the field.

   When you start typing, the active column will be put in editing mode, and a cursor will appear. If there is already text in the column, your new text will be added to the end of the existing text.

3. Create a new row (see below) and continue with the list until it is complete.
4. Save the changes.

When in Editing mode, you can move to the next field by using the tab-button, or by clicking in the column with the mouse. You can move directly to an adjacent row by using the up and down-arrow keys on your keyboard. If you are at the bottom of the list, click the down-arrow key to create a new row.

When you are not in editing mode (no cursor), you may use the left and right arrow-keys on your keyboard to move horizontally around in the list. Press <**F2**> to enter editing mode.

In the ActiveX answer list, you can copy rows from the list by pressing <**CTRL+C**>, and paste rows by pressing <**CTRL+V**>. You also can drag-and-drop or copy the entire answer list from the scratchpad and paste it into the Answer list in one operation. To do this, go to the Answers tab in your question and click **Add**or **CTRL+N** to create an answer row in the question's Answer list, then select in the scratchpad all the rows you wish to copy. Then either copy them and paste them into the Answer row, or drag-and-drop the selected answers into the row. Each row of text in the scratchpad that is selected will become a separate answer option in the answer list (additional rows will be created automatically in the list to accommodate the answers) (see Scratchpad on page 316 for more information).

You can copy and paste text directly from MSWord into the text fields. Note however that this copying process can take with it considerable amounts of unnecessary HTML formatting code, and this code will increase the file size and can create problems for later text formatting within Confirmit. Click the **Clean HTML...**button  to remove this unnecessary code. Note that this functionality will keep intact the majority of "desirable" formatting code, such as bold, italics, text color etc.

The **Add predefined** button allows you to add a predefined list or scale to the answer list (see Predefined Lists on page 269 for more information). This is a very useful functionality when you need to reuse, for example, brand lists or scales in the survey. In a predefined row, the first column will become a drop-down-list when activated, giving you the opportunity to choose between the different predefined scales and lists.

Important
Codes are mandatory for all the answers in predefined lists. If a predefined list is added to another list that contains additional answers then the codes used by the two lists may conflict. In this event a message will be displayed and you will be given the opportunity to resolve the conflict (see Conflicting Answer Codes on page 242 for more information).

Note: While a predefined answer list is being used in one or more questions it cannot be deleted from the Questionnaire Tree. If you attempt to delete a list while it is in use, a warning will be displayed containing the question IDs of those questions in which the list is being used.

Click the **Add Group Heading** button to create a group within the answer list and insert a sub-header for the group, and click the Add Group End button to end the group. For example, if you have a list of six elements and want to divide them into two groups with three elements in each, each with its own sub-header, proceed as follows:

1. Add a sub-header line by clicking the **Add Group Header** button.
2. Enter the sub-header text (in the example, the first group header is **French Cars**).
3. Format the text as required (in this case it has been made Bold).
4. Enter the first three answer alternatives (three car makes that originate in France).
5. Click **Add Group End** (this closes the group, allowing you to create another group afterwards).

Repeat the procedure for the next group. The result will be something like the picture below:

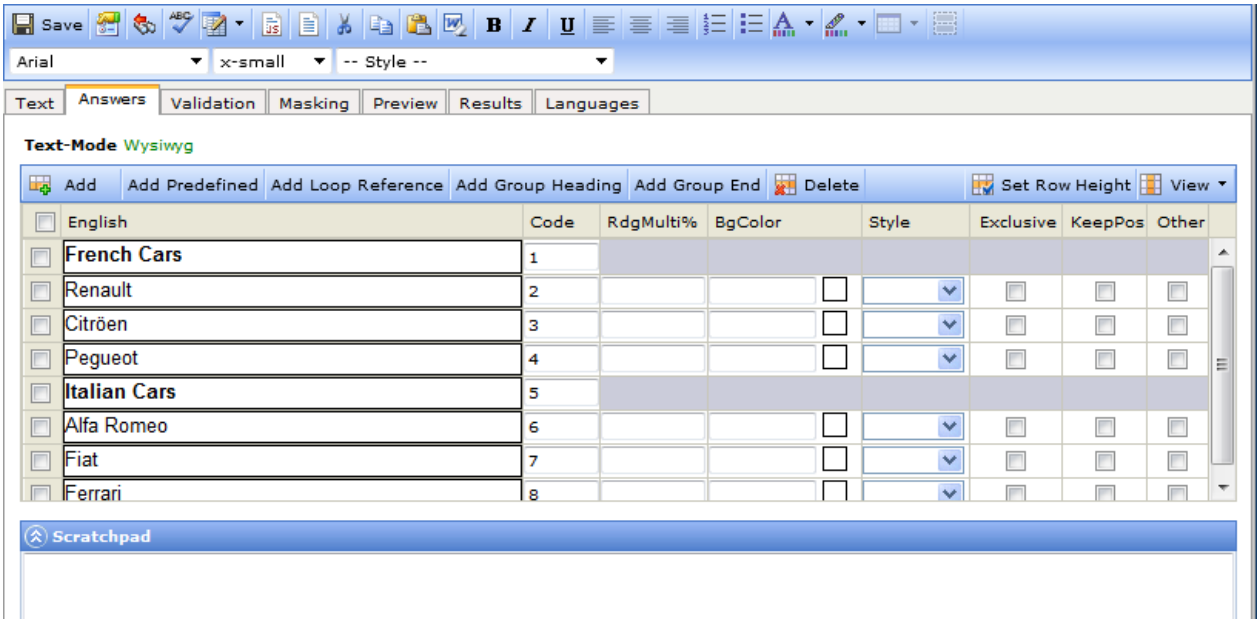


Figure 253 Adding Group Headings

You can set the background colors and/or set styles for the rows, and you can also randomize, rotate, flip, and sort alphabetically the items in each group (see Question Properties on page 251 for more information).

7.4.3.3.2. Codes

When designing a questionnaire, the options available for you to use as the answers to your questions are limited only by your imagination. To simplify the data processing therefore, rather than using the "user-defined" question and answer texts in the database, Confirmit allocates codes both to each question and to each answer option. The code used to identify a question is the "Question ID" (see Question ID on page 235 for more information), and that used to identify an answer option is termed the "Code". Each Question ID MUST be unique for the survey, and each answer code MUST be unique for a question.

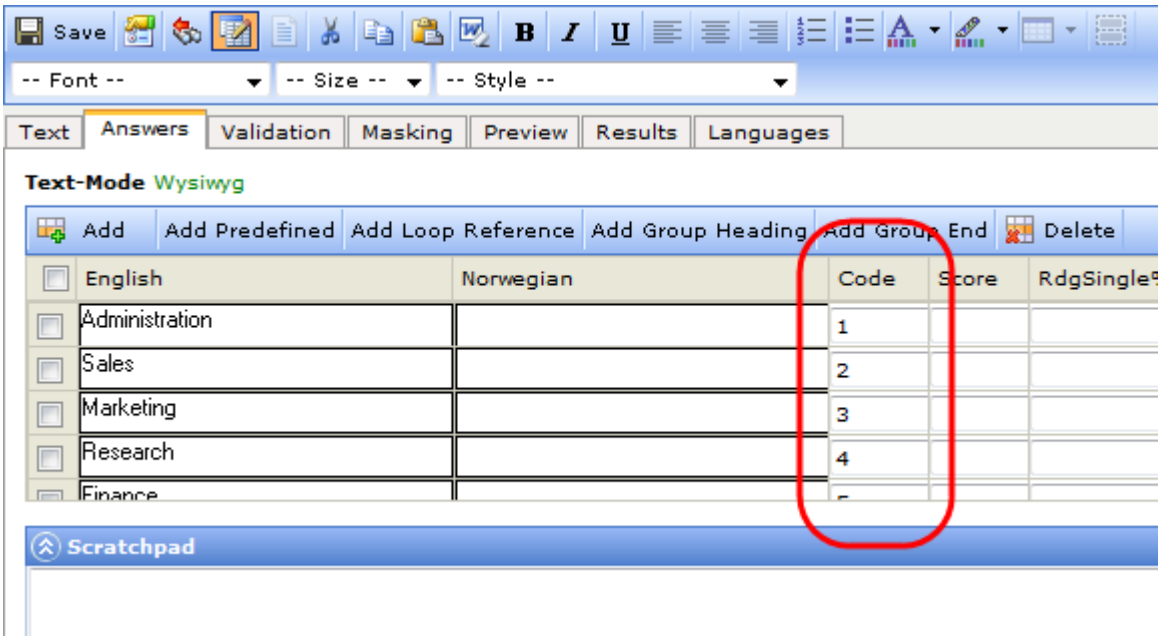


Figure 254 Examples of codes for the answers for a Single question

For single questions and the items of a grid, the codes are stored in the database as string values. For multi questions the codes are used together with the Question ID as the variable name. For example a multi question q1 with three answer alternatives with the codes 1, 2 and 3 will give the three variables q1_1, q1_2 and q1_3 in the database. The same logic applies for the elements of a grid.

When creating the answers for a question, you can apply codes to the answer options manually by typing the desired codes into the fields in the Code column on the question's Answers tab. If a code is not supplied manually, then in most cases one will be allocated automatically when the question is saved. This automatic code will be equal to the answer's position in the list, starting from 1. However in some cases the codes will not be allocated automatically until the survey is launched (see Generating the Response Databases - Launching on page 525 for more information). Cases where codes will NOT be allocated automatically include:

- Answer lists in the “Scales and Lists” folder because these may be used in different contexts, before or after other elements, and may also contain one or more “Scales and Lists” objects.
- Answer lists that contain a reference to one or more reusable scales or lists, for the same reason as above.
- Answer lists containing a reference to a “Loop Reference” list because the content of these can be dynamic.

Note that in all these cases you can set the codes manually.

Note: When creating codes manually the ampersand character (&) must not be used as this can cause problems with scripting.

Important
If you change the answer list while a survey is running, you MUST ensure that the codes follow the original answers.

Codes can only contain alphanumeric characters, with no white space. The default maximum length is 32 characters, though you can change this by typing a value (maximum 50) into the Field Width field in the question's Properties sheet. Illegal characters will cause the database compilation to abort. A maximum of 50 characters will not be a problem for single questions, however problems will arise during launch if grid and/or multi questions use the full 50-character codes - see the note below.

Note: In the database, the column headers are constructed as a combination of the question id and the code, and are limited to 50 characters. If this limit is exceeded for a header, then an error message will be displayed when you attempt to launch the survey. Care must therefore be taken when allocating codes for grid and multi questions if the code maximum has been increased above its default setting.

Note: When using the Legacy database format (see The Optimized Database Format on page 38 for more information), the underscore (_) character can be used, though this is not recommended.

Important
For a question that includes a loop reference (see Linking a Question to a Loop on page 245 for more information), any non-loop reference answers must be given codes manually. These answers cannot be allocated codes automatically as the loop reference will very likely cause duplicate codes to be generated.

7.4.3.3.3. Conflicting Answer Codes

As from Confirmit v18, codes are mandatory for all the answers in predefined lists. If you do not add codes manually when you create the list then consecutive numerical codes (e.g. 1, 2, 3, 4 etc.) will be added automatically to the list when it is saved. If the predefined list is later added to another list that contains additional answers then the codes used by the two lists may conflict. In this event a message will be displayed and you will be given the opportunity to resolve the conflict.

For example:

You have created a reusable list that uses the answer codes 1,2,3 and 4.

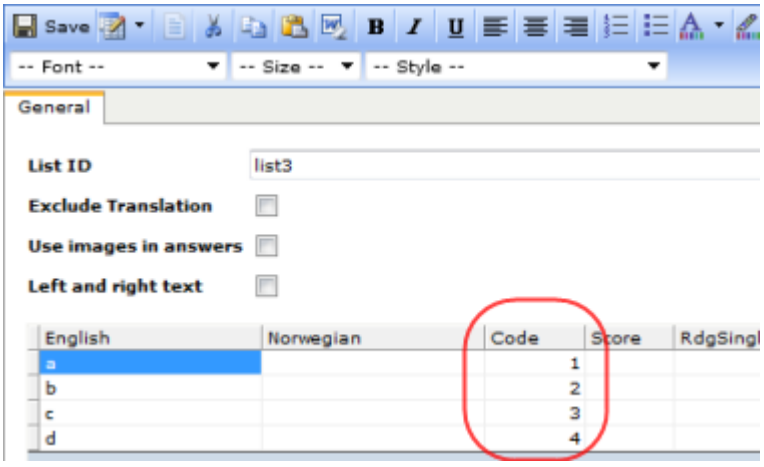


Figure 255 The codes in the reusable list

You later use this list in a question along with other answers.

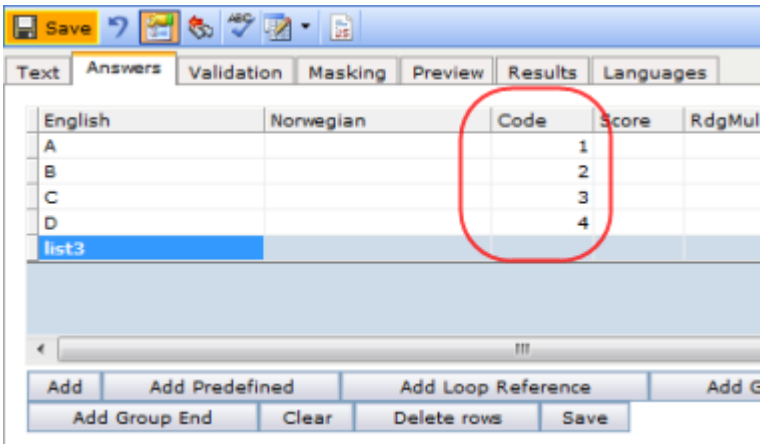


Figure 256 The answer codes in the question along with the reusable list

When you attempt to save the list, the codes will be checked and the duplicate codes will be detected and a message is displayed.

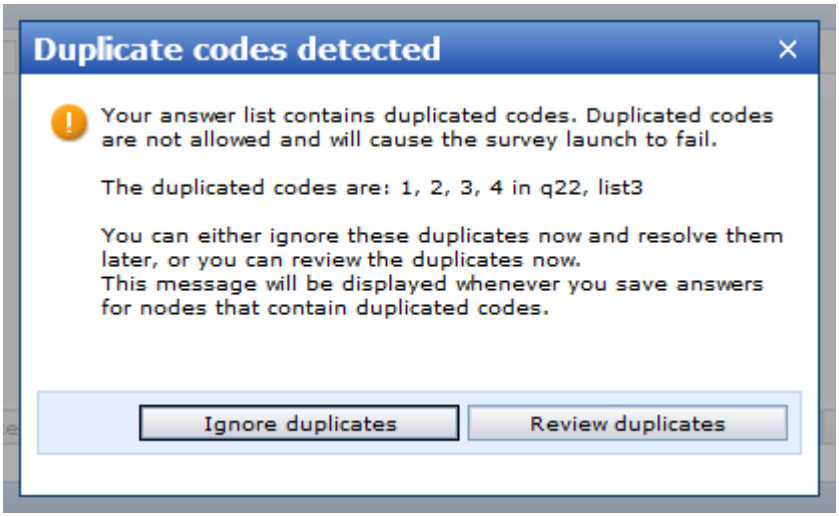


Figure 257 The duplicate code message

You can choose to ignore the conflicting codes at this time. Note however that while the conflict exists you will not be able to launch the survey; the launch will fail with an error message warning you of these conflicting codes.

Click Review duplicates to open a grid view showing the conflicting codes.

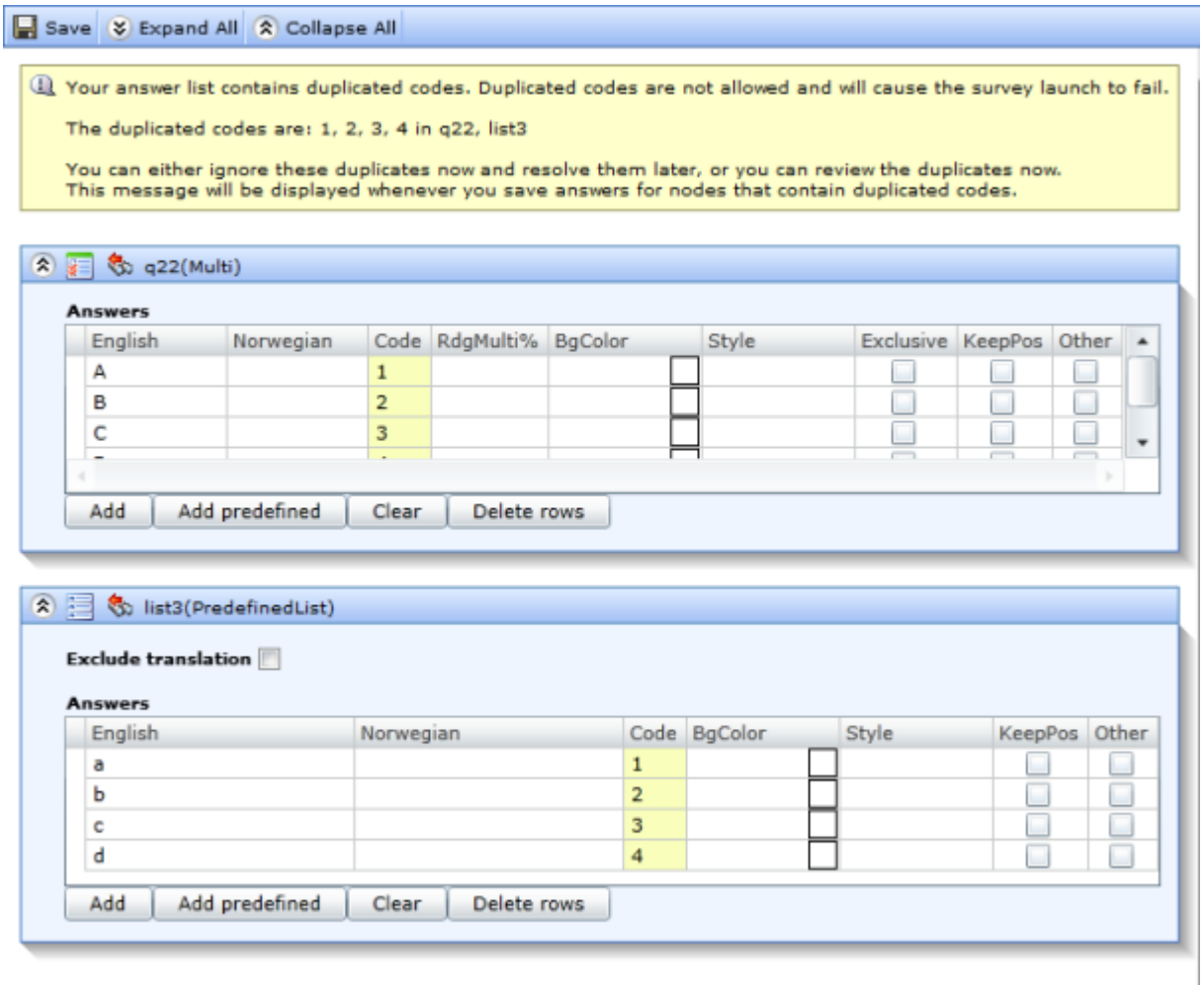


Figure 258 Resolving the conflict in the grid view

In the grid view you can now edit the codes in the question and/or the reusable list as appropriate to ensure they no longer conflict. Bear in mind that if the reusable list has been used in other questions then you will not want to create conflicts in those other questions - it may well be easier to edit the codes in the question rather than the reusable list.

7.4.3.3.4. The Answer List Columns

The list consists of one row for each answer or category, and each row consists of the following columns:

- **Language fields –** The first columns in the list contain the text of the answer. There is one column for each active language (see Languages on page 250 for more information), simplifying translation to other languages.
- **Right Text fields** - in Multi questions, you can add text in a column to the right of the answer fields. This requires the **Open Text** and **Left and Right Multi Text** properties to be set in the question's Properties page. When these properties are set, an additional **[Language] (right)** column appears in the Answers tab (one column for each survey language). Type the text you wish to appear to the right of the answer fields, into these columns.
- **Code –** this is a code given to the particular answer option, which enables Confirmit to find and process the answers (see Codes on page 240 for more information). Each code MUST be unique for a question, and each "Question ID and Code" combination MUST be unique for the questionnaire.

Note: When using the Optimized Database format (see The Optimized Database Format on page 38 for more information), codes are allowed to contain the underscore (_) character.

- **ColWidth –** [Only relevant for scale of grids] Defines the specific minimum width, in pixels, of a scale element in grids. Applied primarily to eliminate width-differences between scale-elements, to create an unbiased scale.
- **Score –** A numeric value for the answer. Use this field to define the individual value/score of each category. You must define values/scores to be able to calculate averages for the question in Rapid Results and Reportal. The average will only be calculated from answers with assigned values/scores. If for example you have “Do not know” as a possible answer, but want the averages to be calculated only from the other answers, you could leave the value/score of “Do not know” blank. The values/scores can be defined at any stage of the survey. Note that you will have to recompile the survey if you define values in an ongoing or closed survey.
- **RDG % –** When you use the Random Data Generator (see The Random Data Generator on page 477 for more information) to test your survey and the survey includes a screening question, use this column to specify a percentage of respondents you want to be screened. This will prevent the system from inserting too many or too few respondents in this group when generating test data. The RDG % numbers must be integers from 0 to 100. You do not have to specify values for all the items in the answer list. Any items without specified values will be given a value according to the remaining percentage, evenly distributed. Note that the RDG% column is only available when you have the RDG add-on enabled. Contact your system administrator for further details.
- **Background color property –** This property makes it possible to have color variations inside a grid, and answer lists in Single and Multi questions.
- Style - select an HTML style for the answer option. The drop-down list contains all the styles available in the **Themes and Skins > HTML Styles** folder (see HTML Styles on page 102 for more information).
- **Image columns -** [only accessible when Use Images in Answers is selected in Advanced WI Features tab] For all questions where radio buttons or check boxes are normally used, you can replace the normal answer option format of button/box and text with images (see How to Use Images as the Answer Options on page 247 for more information).
- **Exclusive –** [Applies to Multi questions only] This gives you the ability to define one or more elements in a multi-punch list as single-punch (for example: “None of the above”). The respondents cannot choose elements defined as multi-punch and elements defined as single-punch simultaneously. If the default validation is used, the respondents must pick either one or more multi-punch elements or one single-punch element.

  The list elements take a standard color string as input. Example: White may be specified as "white" or "#FFFFFF". A list of the color codes is to be found under *Layout.*This property will not be applied when the Drop-down property is selected.
- **KeepPos –** Set this property to “Yes” if you want a variable keep its position when randomizing or rotating a list (for example “*none of the above*” will normally always be last in a list).
- **Other –** Set this property to "Yes" if you want an open-ended text box after the answer alternative.

Note: It is not possible to combine the drop-down option (see Question Properties on page 251 for more information) and Other in Single questions. The Other option overrides the Drop-down option.

If you have checked off this option for several elements of a Grid question, these elements will automatically be marked as Not required (see Question Properties on page 251 for more information), i.e. it will be sufficient to answer the other elements in the Grid.

Click on the **View** button to deselect and add columns.

7.4.3.3.5. Linking a Question to a Loop

Note: This functionality is only available for the Optimized Database format, and is not available for Info and Open question types.

If the Optimized database format has been selected for the questionnaire(see The Optimized Database Format on page 38 for more information), then you can link a loop to the question and use the loop to provide the list of answers presented to the respondent. This reduces the size of the resulting database when the answer list is long, and also keeps the answer list "outside" the question, thereby allowing you to update the answer list without having to regenerate the database. You can also add other answers to the list in the normal manner in addition to the loop. Any settings applied to the answers, for example Randomization, will be applied to all the answers equally, irrespective of where they come from.

Note: Loop reference lists cannot be used in Open text lists, Numeric lists, Ranking questions, or Multis with Capture Order set.

To add a loop, proceed as follows:

1. If the required Loop object does not yet exist, create it and add the desired answers (see Loops on page 289 for more information).
2. Create the question to which you wish to add the loop.
3. In the Answer tab for this question, click **Add Loop Reference**.

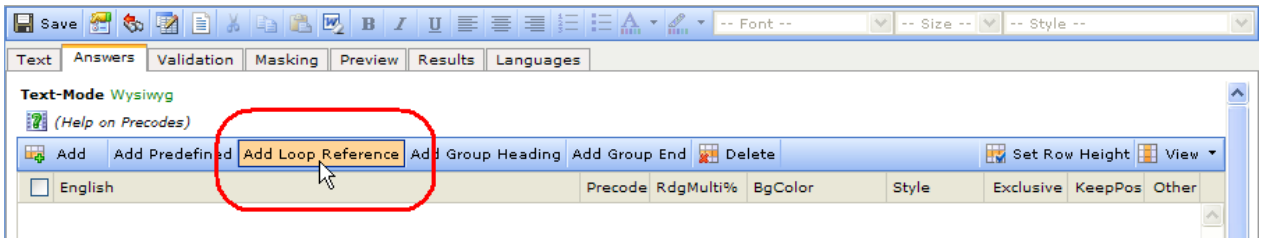


Figure 259 Adding a loop reference to a question's answer list

A row is added to the answer list, including a drop-down list of the available loops.

4. Click the down-arrow beside the answer field to open the drop-down list of the loops available, and select the desired loop from the list.

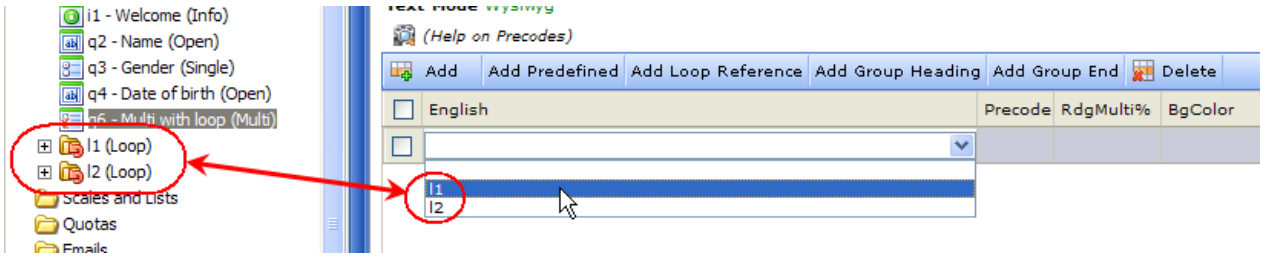


Figure 260 Selecting the desired loop from the list of those available

Note: The list will only include loops that are at the same level in the questionnaire as the question to which you are linking the loop. I.e. You cannot link to a "loop within a loop".

Important
A question can link to at most one loop. An error message will be displayed when you launch the survey if you attempt to link to more than one loop.

5. Add any other required answers in the normal manner.

Important
For a question that includes a loop reference, any non-loop reference answers must be given codes manually (see Codes on page 240 for more information). These answers cannot be allocated codes automatically as the loop reference will very likely cause duplicate codes to be generated.

6. Save the changes.

7.4.3.3.6. How to Use Images as the Answer Options

For all questions where radio buttons or check boxes are normally used, such as single, multi and grid questions, you can replace the normal answer option format of button/box and text with images. For example, in a Gender question, instead of using radio buttons and the texts "Male" and Female" as the answer options, you can use images of a man and a woman. Note that if other options such as "Open text" or "Drop-down list" are selected which would make the use of images illogical, then the option will not be available.

Note: Use Images in Answers will not display a scale label for grid and multi grid questions in Mobile rendering as these question types will be split up into single or multi questions. If you use "Global button images" in Survey Settings then both images and labels will be displayed on desktop rendering, and on mobile rendering only the label will be displayed (Global button images are not supported on mobile).

To use images in place of text answer options:

1. Go to the Question Details page for the question, go to the **Answers** tab and set the Switch Answerlist Mode to **DHTML answerlist**.
2. Open the Properties page for the question and go to the **Advanced WI Features** tab (see The Advanced WI Features Tab on page 258 for more information).

   If this tab is empty then you probably have another option such as "Open text" or "Drop-down list" selected on the General tab. Deselect these options to activate the Advanced WI Features options.
3. Select the **Use Images in Answers** box.

   Three additional columns become available in the Answers list and two additional fields appear in the Advanced WI Features tab, as shown below.

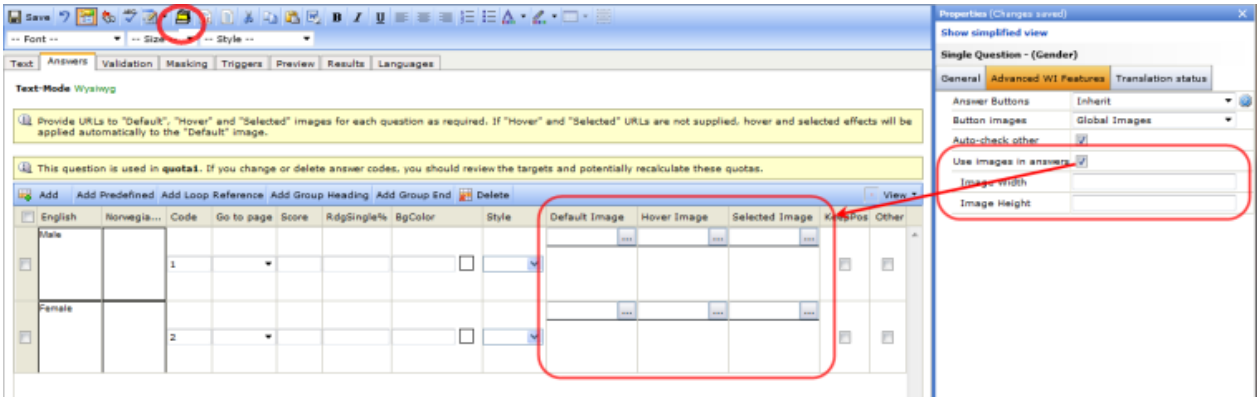


Figure 261 Using images in answers

The three additional columns allow you to add up to three separate images for each answer option; for when the option is not selected (Default Image), for when the respondent's mouse cursor is over the image area (Hover Image), and for when the option is selected (Selected Image).

Note: If you do not wish to add URLs for Hover and/or Selected Images here, then Confirmit will automatically use variations of the Default Images when the respondent hovers over or selects one of the answer options in the survey. In this case, when the user hovers their cursor over the answer option, the image will expand slightly and be given a "3D" frame. And if the option is selected then the image will be given a "selected radio button" or a "checked checkbox" depending on whether the question is a single or multi.

4. To add an image to an answer, click the **...** button beside the appropriate link field (these buttons only appear in DHTML answerlist mode), or click the **Choose image from File Library** button in the toolbar (ringed in the image above).

   The File Library screen opens in the lower part of the window (see File Library on page 157 for more information).

5. Drag and drop the required image from the File Library into the appropriate field.

   A link to the image is added to the field, and a thumbnail image is displayed in the area below the link field.

6. In the Advanced WI Features tab set the desired height and width for the images.
7. Save the changes.

You can go to the **Preview** tab to view the results.

7.4.3.4. Scale

Note: This page is only available for grids.

This page defines the *scale* dimension of a grid. The page is functionally similar to the *Answers* page and includes many of the same columns (see The Answer List Columns on page 244 for more information), and can include the following additional column:

- **Bar Height –** allows you to specify the height in pixels of a bar to be placed above the scale column. For example, in a "Please indicate on a scale of 1 to 10, the importance…." question, you can add a small bar to the "1" column, a bit larger bar to the "2" column, a bit larger bar to the "3" column etc. to give a ramp effect. This column is only visible if the **Show Scale Bars** property is selected in the Properties page for the question (see The General Tab on page 251 for more information). You can set the color of the border and fill for the bars in the Question Form Input Properties form (see Scale Bar Label Style on page 99 for more information).

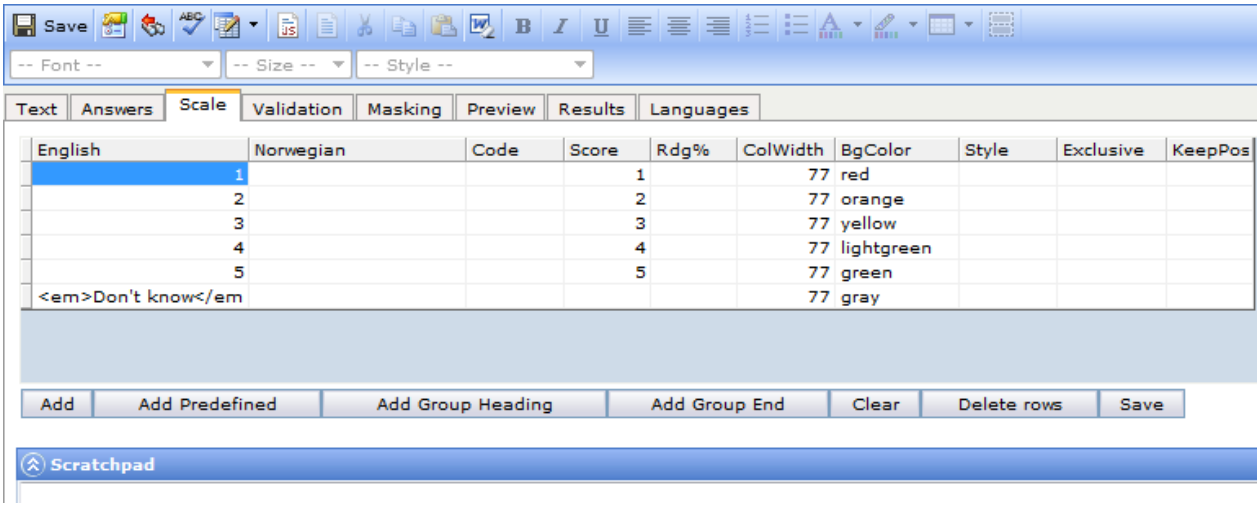


Figure 262 Example of a Scale page for a grid question

Note: It is not possible to have a header in a scale of a grid inside a 3DGrid. If you include a header in a predefined list and that list is used in a scale, then the header is ignored.

7.4.3.5. Triggers

The Dynamic Questions functionality enables you to refresh parts of a page depending on changes made in other parts of the same page. For example, you can specify that the text piping in question 2 is refreshed whenever the respondent changes the response given to question 1.

Use this tab to specify which question is to trigger the refresh action for the current question.

Note: This functionality only applies when there is more than one question on a page. Triggers are not available for Chart nodes.

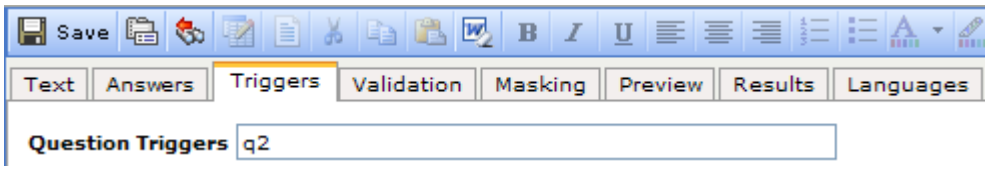


Figure 263 Example of the Triggers tab

Go to Dynamic Questions for further information.

7.4.3.6. Validation

For unlimited flexibility in question-validation, you can use JScript-code to validate your answers (see Confirmit Scripts on page 448 for more information).

7.4.3.7. Masking

Depending on the object type, this tab can include one or more of the following masking fields:

- Code mask.
- Question mask.
- Column mask.
- Scale mask.

If you want to dynamically exclude one or more of the answers, scale items, 3D Grid columns or entire questions, use this field to create a JScript-expression (see Confirmit Scripts on page 448 for more information).

7.4.3.8. JavaScript

The JavaScript tab is displayed when the Coding Screen Size option on the User Settings page is checked (see User Settings on page 134 for more information). This tab allows you to add client-side JavaScript to questions, and have it executed once the question has been rendered and any Advanced WI Features have been initialized. The JavaScript tab is available for Info, Single, Multi, Open, Grid and 3D-Grid questions (not the questions inside a 3D-Grid).

A button is available on the Question Details page for the relevant question types to open the editor.

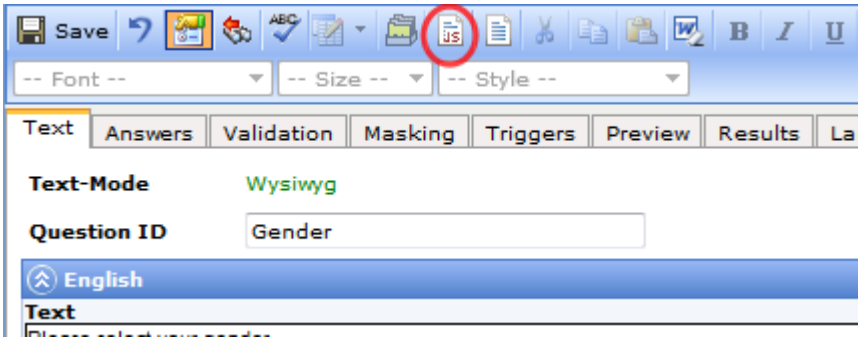


Figure 264 The button to open the JavaScript Editor overlay

Note: The script is also run for dynamic questions and inline surveys. This does not happen when script is added directly in the Question Title/Text/Instruction fields.

Important
Custom client-side code added into the JavaScript tab is treated as Advanced WI code. If a respondent accesses a survey containing such code via a browser that does not support Advanced WI Features (see The Advanced WI Features Tab on page 258 for more information), then the custom JavaScript code will not run.

7.4.3.9. Preview

The Preview page will give you an idea of the respondent's view of the question. The question is displayed using a standard web-interview template. Once you generate the WI for the first time, either in Test mode or in Production mode, the template you have chosen will also be applied in Preview.

Note: Hidden questions (see The General Tab on page 251 for more information) are shown in Preview and Quick Test, with the text "HIDDEN DATA" alongside to identify them, so you as the author can ensure they function correctly.

Note: Internet Explorer cannot render the iPhone/Android preview correctly. When previewing the questions in these modes you must therefore use either Chrome or Firefox.

7.4.3.10. Results

This page displays the Rapid Results report page for the current question (see Rapid Results on page 706 for more information).

The date and time when the BitStream files were last updated is displayed above the chart. If the data in the response database has changed since the last time the BitStream files were updated, then the message shown in the example will be displayed. Click the link to update the BitStream files, and thereby the date presented on the page.

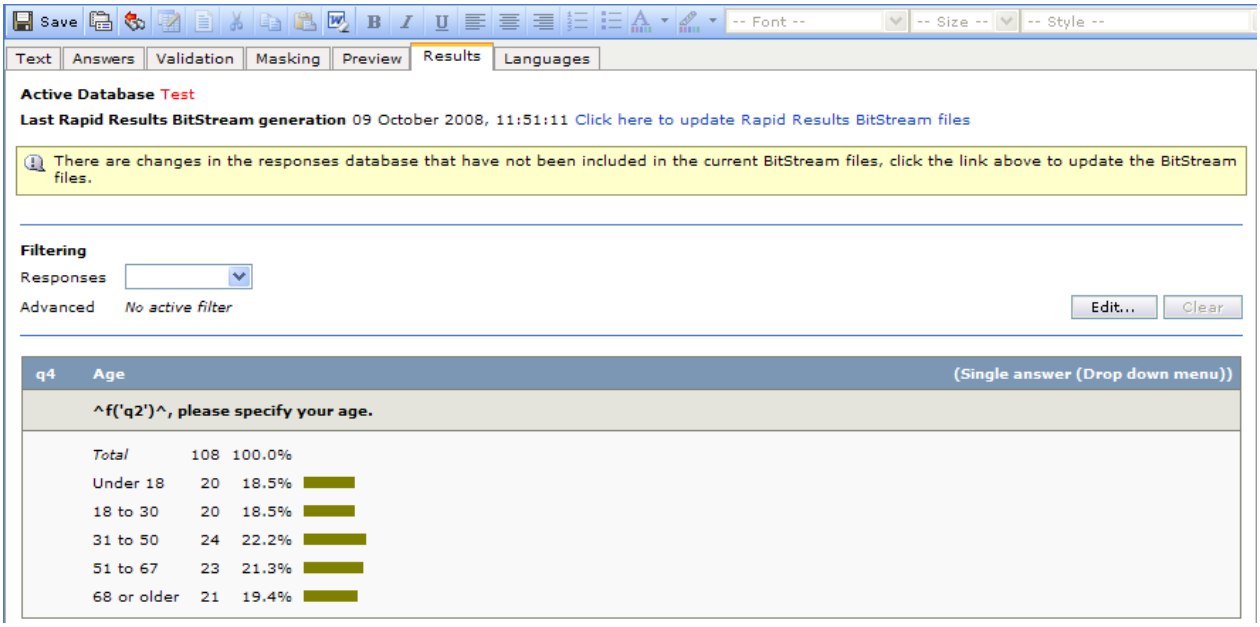


Figure 265 Example of the Results tab for a question

Note that while you are creating the survey and before you have any "genuine" data in the database, if you wish to see how the results will be displayed then you can go to the Test database, add random data, then update the BitStream files.

7.4.3.11. Languages

In a multilingual survey you can have as many languages as you wish. However due to the space available, a maximum of five language fields can be available for editing at any time. The Languages page allows you to specify which languages you wish to be visible while you are working. Check or uncheck the language boxes so the languages you wish to work with are selected, then go to the other tabs where the selected language fields will be displayed. Note that the Languages page is common for all questions in the survey; the languages selected in this page for one question will be available for all the questions in the survey.

The languages selected here will also be remembered by Confirmit such that when you move out of the survey, upon return, the active languages selected in the previous session will be re-selected. You will therefore not have to reselect the languages every time you enter a particular survey.

Note: Survey languages are selected on the Overview page (see Overview on page 174 for more information)

7.4.3.12. Question Properties

To display a question's property list while the Question Details page is open, click the **Show/Hide Properties** button on the toolbar.

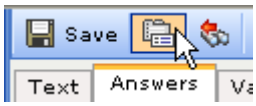


Figure 266 The Show/Hide Properties button

If you want to open the Question Details page for a question and its property list simultaneously, right-click on the question's icon in the Questionnaire Tree toolbox and choose **Properties** from the menu that appears.

The properties list opens in a new frame (see Frames and Panes on page 24 for more information).

The property sheet opens with a few of the most-used properties; click **Show advanced view** towards the top of the sheet to view the full list of properties. Click **Show simplified view** to return to the reduced list.

The different question types have different properties available to them. All the possible properties are listed in the following sections.

7.4.3.12.1. The General Tab

Note: Row and column settings also apply to mobile touch rendering. This affects the following question types: Open, Open text list, Numeric, Numeric list, and the Other box for all types. For mobile touch rendering, the maximum Rows value is 5, and maximum Columns value is 50.

- **List Rows/Columns –** [Single, Multi, Ranking, Lists] Divides the answer list into several columns and/or rows. If you specify only the number of rows, the answers will be distributed evenly across the columns and vice versa.

Note: For a Single question which is set to Slider in the Advanced WI Features tab (see The Advanced WI Features Tab on page 258 for more information), the slider will be displayed vertically by default. To change the slider to horizontal, set the List Rows property to 1.

Note: For Numeric and Numeric List nodes (see The Numeric Object on page 224 for more information), the default Column width of the input box is calculated from the constraints placed on the node by the max/min/decimals/total digits settings (see lower on this page). If the max/min/decimals/total digits settings are altered then the default setting will be updated automatically when the survey is launched. The default setting will be overridden if you type a specific value into the Column field.

These options have no effect on Single drop-down questions.

If you have specified both options, Columns will be preferred as an option in cases where the number of elements is higher than specified.

In Grids, if you have chosen Drop-down as an option, List Rows/Columns may be used to specify the number of rows and columns for the drop-downs.

- **Answer Column Width** – [Grid, Multi Grid, Lists] Defines a width, in specified units, of the answer column in grid and list questions. This allows you to align the answer options in the event HTML tables are not being used due to the Accessibility functionality.

- **Rows/Columns –** [Open Text, Lists] You can control the size of Open Text question boxes. The default size for Rows = 1 and Columns = 50. The Open Text questions may appear as text areas or as single line input boxes. Rows = Height (number of lines), Columns = Width (number of characters). To produce a single-line input, set "Rows" to 1.
- **Field width –** [Not Numeric, Date, Info] Number of characters assigned to this question in the database and when exporting to fixed width ASCII files. The default FieldWidth for Single and Grid questions is 32 characters. The default FieldWidth for ordinary Multi questions is 1 character.

  In one-row text boxes, it will not be possible to enter more characters than specified in Field width. If the text box has several rows, an error message will be generated, and the answer will be truncated.

  If you specify FieldWidth for Open Text questions, you will be able to use them in crosstabs. Note that the maximum field width for Open Text questions is 8000.

  For Open text and Multi questions, if you specify a field width that is shorter than the responses in the database, you will receive a warning that the data will be truncated.

- **Single in reporting -** [Open text and multi open text, when the field width is set to 150 or less] If this property is selected, this question will be treated as a single choice question when used in reports. The open text field width must be 150 characters or less for this setting to be effective. If the field width is greater than 150, a warning will be given when the survey is launched. Note that reporting on Open text as singles is by default limited to the first 200 aggregated counts (calculated during hub processing). This limit can be increased if necessary, though there may be performance implications; contact Confirmit Support for further information. Note also that certain special characters, if used for open text questions that are set to "Single in reporting" in Authoring, will cause issues in Reportal. These special characters must therefore be avoided in the text of such open text responses. The system will accept the characters, both on respondent upload and in the survey, however Reportal may encounter problems when the responses are used for example in aggregated tables and filters. These special characters are:
  - , (comma)
  - &xxxx; (HTML character references)
  - <>
  - ' (apostrophe)
  - \"
  - Space
  - &
  - \n

  Note that the main use case for the "single in reporting" feature is not for open text questions where the respondent is filling in free text, because that is almost never categorical (due to typos etc.). It is for background open text questions, where data comes from for example a CRM system and is categorical in nature, for example City, Department, Product name etc.

- **Keep Position -** [3D Grid] If this property is chosen, the item will keep its position in the 3DGrid when Column Display Order is set to be randomized, rotated, flipped, or alphabetically sorted.
- **Password –** [Open, Numeric] makes it possible to collect data from the screen in a password style. The letters will appear as **** on screen. In addition, you can validate the password, or use screening:

  If *the password question* has question id q1 you could use the following condition in your validation code:

  IF (f('q1') == "*secret_password")*

  THEN (the questionnaire)

  For organizations that want to do internal surveys but do not want that their employees log on with personal passwords and userids or unique urls, this may be a solution. The survey password must then be distributed within the organization and be the same for all respondents.

  Rows are always forced to 1 for questions with password property, no matter what you specify in Rows in Properties.

- **Other box rows –** [Single, Multi, Grid, Multi Grid, Ranking, Lists] defines the number of rows for the 'Other' input box. This only takes effect if set to larger than 1. Note that when using styles, the vertical alignment of the other-input determines the vertical alignment of the associated label.
- **Other box columns –** [Single, Multi, Grid, Multi Grid, Ranking, Lists] defines the number of columns for the 'Other' input box.
- **Dropdown –** [Single, Grid] Singles and grids are normally represented as rows and columns of radio buttons. This flag will generate drop-down-boxes instead.
- **Use title in dropdown –** [Single, Grid] appears when “Dropdown” property is selected. Choose this property if you want to use the question title as the drop-down title instead of the default “Please select an answer”.
- **Capture Order -** [Multi, Lists, only for Optimized db] check this box to allow the order in which categories are selected to be accessed using scripting functions. The Confirmit Scripting manual describes the use of these functions: AnswerOrder() First() and Nth(). Note that when this property is enabled, at least one category must be selected to continue past the question. Capture order relies on client side scripting. If the browser you are using does not support this, the question will default to a ranking question (input number rank values). To the respondent, the question will appear as a normal multi/list. This feature is primarily for use in the CATI environment.

Note: Capture order is not supported when using answer buttons.

Important
Once a survey containing a Capture Order Multi is launched, if you wish to change the question back to a regular Multi you must create a new database. You can however change the question to a Ranked Multi. Also, if a survey is live and you check the Capture Order option for a question and relaunch the survey, any existing data gathered for that question will be invalidated. In this case, once you have confirmed the launch, it cannot be stopped.

- **Opentext coding –** [Single, Multi, Ranking] Check this flag to specify that this question will be used for coding of an Open-Text question. Remember to check **Hidden**, too! (see The Online Coding Tool on page 658 for more information).
- **Coding of –** appears when Opentext Coding is selected. Here you specify the Question ID of the Open-Text question that will be coded in the Multi question (see The Online Coding Tool on page 658 for more information).
- **Indexed –** [Single, Numeric, Date] If this property is selected, an index will be created on this field in the database next time you generate the database. Indexes in databases are similar to indexes in books. In a book, an index allows you to find information quickly without reading the entire book. In a database, an index allows the database program to find data in a table without scanning the entire table.

  Indexes improve performance in areas such as 1) aggregated and verbatim reporting when filtering on fields with indexes 2) searching in individual reporting and in survey data editing (when search fields are indexed) and 3) data imports where the key field is indexed.

Note: Indexes should be used only when needed since responses take longer to store the more indexes there are. This can lead to slightly poorer performance in interviewing. Also, the database will be unavailable for other processes the first time it is regenerated after the index property is set. We therefore recommend against setting new indexes and regenerating the survey while respondents are answering the survey. Note also however that some functionality in Reportal, for example Hitlists and hierarchies, require the question to be indexed.

- **Answers –** [Single] Choose between using a “Normal answerlist”, setting up the answer texts and codes in the answers tab (see Answers on page 237 for more information), or getting the answer from table(s) set up in “Database Designer” either as “Table lookup” or “Hierarchy lookup” (see Database Designer on page 399 for more information). This functionality is an add-on to Confirmit, so it may not be enabled for your company.

  If Hierarchy Lookup is selected (see Using Table or Hierarchy Lookups in the Questionnaire on page 425 for more information), then two additional properties become available:

- **Force lowest level selection -** check this box to allow the respondent to select only from the lowest level of the hierarchy. For example, if the hierarchy comprises Continents and Countries, and the question asks the respondent to select his/her country of residence, then you can allow the respondent only to select from the Countries list, not from the Continents.
- **Hierarchy UI Mode -** select the user interface mode to be used for rendering a hierarchy question. The options are Drilldown and Dropdown. Drilldown is the original experience for displaying the hierarchy lookup. When Dropdown is selected, each level is displayed as a drop-down. As an answer is selected, if a lower hierarchy level exists a new drop-down appears below. Dropdown is set by default for new Hierarchy lookups. Dropdown does not offer search capabilities. Note that this property applies to desktop rendered surveys only. When respondents use the iPhone/Android optimized rendering mode, Hierarchy questions are always displayed as drop-downs.

- **Answer list/Scale display order –** [Single, Multi, Grid, Multi Grid, Ranking, Lists] these properties control the display order of the answer list [all specified] and scale [Grid only]. The items can be displayed:
  - **In order –** in the order that they appear in the list.
  - **Randomized –** in pseudo-random order (see Randomization on page 275 for more information).
  - **Rotated –** the list is shifted and rotated by one position for each new response.
  - **Flipped -** will alternate between displaying the list top-bottom or bottom-top for different respondents.
  - **Alphabetically sorted -** will sort the list alphabetically based on the labels (in the current language).

  When the answer list contains Group headings, the Answer list display order controls the order in which the items inside each group are displayed. If the list does not contain any Group heading items, then the Answer list display order controls the order of all the items in the list. The order of the groups is controlled by the Group display order.
- **Questions display order -** [Multi Grid] controls the display order of the answer list.
- **Group display order –** [Single, Multi, Grid, Ranking, Lists] This property controls the display order of the answer list elements in a subgroup, i.e. when Group Headers have been used. The items can be displayed:
  - **In order –** in the order that they appear in the list.
  - **Randomized –** in pseudo-random order (see Randomization on page 275 for more information).
  - **Rotated –** the list is shifted and rotated by one position for each new response.
  - **Flipped -** will alternate between displaying the list top-bottom or bottom-top for different respondents.
  - **Alphabetically sorted -** will sort the list alphabetically based on the labels (in the current language).

  When the answer list contains Group headings, the Group display order controls the order in which the groups are displayed. The items inside each group are controlled by the Answer list display order. If the list does not contain any Group heading items, then the Answer list display order controls the order of all the items in the list.
- **Column display order –** [3DGrid] This property controls the display order of the columns in the 3DGrid. The columns can be displayed:
  - **In order –** in the order that they appear in the grid.
  - **Randomized –** in pseudo-random order (see Randomization on page 275 for more information).
  - **Rotated –** the order is shifted and rotated by one position for each new response.
  - **Flipped -** the order will alternate between displaying the columns left-to-right and right-to-left for different respondents.
  - **Alphabetically sorted -** will sort the columns alphabetically based on the labels (in the current language).
- **Total digits** - [Numeric, Numeric List] specifies the maximum total number of digits that can be stored, both to the left and to the right of the decimal point). Input an integer 0<p<=28.

- **Decimal places** - [Numeric, Numeric List] specifies the maximum number of decimal digits that can be stored to the right of the decimal point. Input an integer 0<=s<=p.
- **Upper / Lower limit / type** - [Numeric, Numeric List] (float) and “Upper Limit” (float) are available to define the scope of the entry. For “Lower limit”, there is a drop-down “Lower limit type” containing the choices “>” and “>=”. For “Upper limit”, there is a drop-down “Upper limit type” containing “<” and “<=”. Note that these properties must be defined for the Slider option to be available on the Advanced WI Features tab.

Note: For Numeric questions, the respondent can use either comma (,) or point (.) as the decimal separator according to his/her language standards. The respondent can also write a decimal number with a value less than 1 without the leading zero, for example ".35", and the negative sign (-) can be input as the first character; no other non-numeric characters will be accepted.

- **Variable type** [not Info]

  - **Normal –** An ordinary question object.

  - **Hidden –** [Single, Multi, Open, Grid] A hidden question ("dummy question") is hidden from the interviewer/respondent, i.e. it is never displayed. However its value may be set on the fly from script-objects, making, for example, “on-the-fly”-recoding possible. It is used for internal programming purposes or for reporting when you need to store a calculated variable which is used for example as a filter in a question or for some arithmetic calculations on some of the respondent's answers.

Note: Hidden questions are shown in Preview (see Preview on page 250 for more information) and Quick Test (see Quick Test on page 472 for more information), with the text "HIDDEN DATA" alongside to identify them, so you as the author can ensure they function correctly.

  - **Background –** [Single, Multi, Open Text] Treat this form as a background variable. Background variables are by default Hidden. The form will not be displayed in the interview, but will obtain its value from the respondent list. This functionality can be very useful when you have information about your respondents which you want to apply in the skipping-logic of your questionnaire. A column with a name equal to the form-ID is required in the respondent list (see Handling Respondents in Limited Surveys on page 540 for more information).

  - **Recoded variable -** [Single, Multi, Open Text] Used in Reporting. Turns this form into a recoded variable, which will not be displayed in the interview. You can predefine complex recoding rules in SQL or JScript (see Recoding Data on page 750 for more information).

  - **Panel variable (hidden) –** Treat this question as a Panel variable, and hide it from the panelist. This variable type can be used to pull values from the corresponding field (with the same variable name/type) in the panel database. This is automatically done at the point in the survey where the variable is placed. Hidden panel variables will not push any data back to the panel, so in the event you need to set different values for these hidden fields, you will have to write a script to submit those values to the panel database (see Basic Panels on page 586 for more information). Note that this setting cannot be applied to Grid and 3D-Grid questions.

  - **Panel variable (visible) –** Treat this question as a Panel variable, and leave it visible to the panelist. This variable type will pull the value that is stored in the panel database (if there is a value there). The question will be displayed to the respondent with this value, and the respondent can modify it and submit a different response as necessary. For surveys linked to a Professional Panel the new value will automatically be submitted to the panel database when the respondent moves to the next page, if the panelist exists in the panel database. For panelist “registration” surveys, this means that the panelist must be added to the panel first (with the CreatePanelist function call), before the visible panel variables will be able to push data to the panel. For profile update or regular surveys, the panelist will already exist. For Basic Panel, no data will be submitted back to the panel database (see Basic Panels on page 586 for more information). Note that this setting cannot be applied to Grid and 3D-Grid questions.

- **Level –** appears when Variable Type above is set to Recoded Variable. Defines the order in which the recoded variables will be calculated.
- **Question Skin** - [All] allows you to select a different question skin for the particular question. If no skin is specified here, then the default skin for the survey will be used (see Question Skins on page 85 for more information).

- **Answer Required -** [Multi] replaces the Not Required checkbox that is available for the other question types (see below). Multi questions are by default not required. However Multi questions with a single punch item will be required as long as the default exclusivity validation is used. The drop-down contains three options:
    - **Blank –** Replicates previous “Not required” behavior.
    - **Required –** Forces the question to be mandatory.
    - **Not required –** Allows the question to be left blank.
- **Boolean** - [Only Optimized DB, Single] check this box if you wish the system to store the data as 1-Bit (in the old database it is stored as 1-Byte (8-Bits)), thereby using 1/8 the amount of storage space.
- **Ranking –** [Grid - supports touch devices] Check this flag if you wish the generator to produce code that ensures that the inputs in Grid questions are unique and consecutive (ranked) for each alternative in the list (see The Ranking Object on page 227 for more information).
    - **Gray out selected -** [Grid] when Ranking is selected, this option appears. If you check this option the "unselected" answers in the grid column will be grayed out.
- **Not required –** [Not Info, Multi (see above), Ranking] Normally, all questions require an answer if you have checked off the option Answer Required in Survey Settings (see Preparing for Data Collection on page 492 for more information). Check this flag to turn off this validation for the particular question.

  [Questions in 3D Grids] When the 3D Grid object is required, i.e. the questions inside it may be required or they can be set to Not required. When Not required property is selected for the 3D Grid, all questions inside it will be Not required.
- **Bitstream Variable** - [Open Text, Date] check to include the responses in the BitStream file. In the case of Open questions, Confirmit recommends that you select this setting only when you know that there will not be many different answers for the open question. If the question will or is likely to receive many different answers, then the resulting BitStream files can be very large and cumbersome and may cause problems.
- **Read only –** [Not Info] used to display questions to respondents as read only, usually displaying pre-selected answers set by a script (see the Confirmit Scripting Manual). For example, a respondent goes to the next page of the survey where a single question is displayed. This question has one of the answers already selected, and the respondent is not allowed to modify the answer. Select this property if respondents should not be allowed to modify the pre-selected/preset answers.

Note: When a question with the Read Only property enabled is set by script within a condition, and the respondent backtracks so that the condition later evaluates to False, off-path data cleaning is not performed on the Read Only question within the condition that now evaluates to False.

- **Default Answer Code** - [if CATI, Single, Multi] if a survey is CATI enabled (see CATI on page 648 for more information) then you can allocate an additional code attribute to single and multi questions. If the Default answer code is applied to a question, then during CATI interviewing the CATI interviewer can use the **Default** button or keyboard shortcut (**Ctrl+d**) to select the default answer.
- **Refused Answer Code** - [if CATI, Single, Multi] if a survey is CATI enabled (see CATI on page 648 for more information) then you can allocate an additional code attribute to single and multi questions. If the Refused answer code is applied to a question, then during CATI interviewing the CATI interviewer can use the **Refused** button or keyboard shortcut (**Ctrl+r**) to select the Refused category.
- **Available as CATI filter -** [if CATI, Single, Numeric, Open Text] if checked, the variable will be available in the CATI Supervisor with the following properties: it can be used in filter creation, it can be selected and viewed in Call management, it will be visible in the interviewer console as a searchable variable (if set by the Supervisor), and in CATI scheduling rules, if it is a background variable it can be referenced via the fr() function. Note that variables with this property checked cannot be inside a loop, and Open Text questions must be fixed width <=255. Note also that by default a maximum of 40 questions per survey can have this property enabled. For On-Premise users this value is configurable by the system administrator.
- **Repeat Headers –** [Grid, Multi Grid] When this property is selected, the grid headers will be repeated for every N rows. N is the number of repetitions specified in the Header Frequency property.
    - **Header Frequency –** appears when Repeat Headers is selected. When using Repeating Headers, this property specifies the number of rows between headers. For example with Header Frequency set to 10, you would get a row of headers, then 10 data rows, headers again, and then more data rows.

- **Bottom Headers –** [Grid, Multi Grid] When this property is selected, the grid headers are also shown at the bottom of the grid.
- **Left and Right Grid Text –** [Grid] When this property is enabled, you can specify answer texts for both sides of the grid (bipolar scales). When adding or editing answers you will notice one extra column for each language in your survey, for example the column 'English (right)'. This column is for filling in the texts to be shown on the right hand side of the grid.
- **Show Scale Bars –** [Grid] you can use bars to visualize the scale. When checked, a box is placed above each scale column, and you can set the height of the box in pixels in the Scale tab for the question (see Scale on page 248 for more information). This allows you to add for example a “ramp” above the scale columns to illustrate the value of the scale.
- **Force Number of Items –** [Multi] You can force respondents to select a specific number of answers, define the minimum number of answers, and define the maximum allowed number of answers.
    - **Equal to -** This property is used to specify the exact number of answer items to be selected by a respondent taking the interview. Here you must take into account the number of answer items available, especially when using masking.
    - **Min -** This property is used to specify the minimum number of answer items to be selected by a respondent taking the interview. Here you must take into account the number of answer items available, especially when using masking.
    - **Max -** This property is used to specify the maximum number of answer items to be selected by a respondent taking the interview.
- **Force Sum of Answers** - [Multi, Open Text, Numeric] if you add numerical values to these fields (you can use decimal places), Confirmit will require that the sum of the answers to the question is the appropriate value. If, when a respondent attempts to proceed to the next question, the sum of the replies to this question is not as required, a warning message will be displayed and the respondent will have to adjust their answer(s) before proceeding to the next question.
    - **Equal to** - type in a numerical value here to make Confirmit require that the sum of the answers to the question is this specified value. Note that any value you enter here must correspond logically with any values you may enter in the 'Total Digits' and 'Decimal Places' fields. Note also that if you enter a value here then the Min and Max parameters described below will be redundant and will be hidden automatically.
    - **Min** - Confirmit will require that the sum of the answers given by the respondent to this question is at least this specified value. Note that if a value is entered here then the Equal To parameter will be redundant and will be hidden automatically. Note also that if you specify both a Min and a Max value, then the Min value must be less than the Max value.
    - **Max** - Confirmit will require that the sum of the answers given by the respondent to this question is not greater than this specified value. Note that if a value is entered here then the Equal To parameter will be redundant and will be hidden automatically. Note also that if you specify both a Min and a Max value, then the Max value must be greater than the Min value.
- **Left and right multi text** - [Lists] allows you to place additional texts after the question's answer fields. Additional columns are added to the Answers tab for each selected language. Note that in the event a respondent fails to provide an answer to a list question where this property is selected, then the resulting error message will indicate which answer(s) is missing, using the right text if no left text is provided.
- **Input Prefix -** [Open text list, Numeric List] the text entered here will appear as a prefix to the numeric or open text list. For Numeric List questions, if the Auto Sum feature in the Advanced WI Features tab is enabled, the text will also appear as a prefix in that field. This property can include scripting functions, so for example different currency characters can be displayed for different survey languages.
- **Input Suffix -** [Open text list, Numeric List] the text entered here will appear as a suffix to the numeric or open text list. For Numeric List questions, if the Auto Sum feature in the Advanced WI Features tab is enabled, the text will also appear as a suffix in that field. This property can include scripting functions, so for example different currency characters can be displayed for different survey languages.
- **Question Category** - [Not Info] defines a category for the question. A Reportal user can then filter on the question categories when using hit lists in single view in Reportal. Refer to the Reportal User Guide for further details. Type the category name (or names) into the field. Multiple categories can be entered; separate using the semi-colon character. For example Food;Drink.

Note: You are advised to use a maximum of 164 characters for individual category names. You can exceed this limit, but single file exports and export templates will then not function.

Note: The number of categories that can be viewed in the translator interface is limited to 1300.

- **Exclude Translation –** [All] allows you to exclude certain questions from the translator interface (see Translator on page 433 for more information). This gives you the possibility to hide nodes that are used for internal programming purposes from the translators in Confirmit Translator.
- **Exclude from reporting -** check if you wish to prevent report designers using this question in a report. Note that this also includes Instant Analytics reports (see Instant Analytics on page 673 for more information).
- **Deleted –** [All] When you delete an object from the routing, it is not permanently deleted, but the “deleted” flag is set. If you turn on *Show deleted nodes*(see Editing the Routing on page 313 for more information), you can undelete the object by unchecking this flag.
- **No cleaning on question masking -** [All] If you have selected to allowed the respondents to modify their answers, the respondents can move back and forth in the questionnaire and change their answers. In this case, to ensure consistency in the data, if a question is masked (Question Mask evaluates to TRUE), the question is hidden and any answers to that question (they may be derived from the answers to other questions) are deleted. However sometimes you may not want to delete the previously entered data. The question property "No cleaning on Question Masking" will prevent this cleaning procedure being performed on this question. Note that a system or company administrator can select the company setting "Set 'No cleaning on Question Masking' as default" for the entire company.

7.4.3.12.2. The Advanced WI Features Tab

The properties available on this tab depend on the type of question selected.

Note: In Confirmit Horizons Version 18, "advanced WI features" such as sliders, drag'n'drop ranking and answer buttons are no longer supported on Internet Explorer 6 or 7, Firefox versions below 10, Chrome versions below 26, Safari on Mac below 5.1 and any version of Safari on Windows. For survey respondents using these older browsers the default fallback rendering will be used for these question types.

Advanced WI Features are not supported in Opera browsers.

Important
Custom client-side code added into the JavaScript tab (see JavaScript on page 249 for more information) is treated as Advanced WI code. If a respondent accesses a survey containing such code via a browser that does not support Advanced WI Features (see Note above), then the custom JavaScript code will not run.

- **Searchable answer list** - [Multi, only with Optimized Database format] Check this box to enable respondents to search in answer lists for the desired answers (see Searchable Answer Lists (Searchable Multis) on page 271 for more information).
- **Answer buttons** - [Single, Multi, Grid, Multi Grid] when “Answer buttons” is enabled, respondents will be presented with a question interface where the answer options are clickable, labeled buttons instead of radio-buttons/check-boxes. This can be enabled for an entire survey by selecting “Answer Buttons” in Survey Settings. It can also be enabled (“On”) or disabled (“Off”) for specific questions through a question property. The property by default is set to “Inherit”, which means it will be controlled by the Survey Settings.

Note: When using Answer buttons, Capture Order is not supported (see The General Tab on page 251 for more information).

- **Button images –** [Single, Multi, Grid if "Use Images in Answers" (see below) is not selected] Allows you to specify images to be used instead of the standard radio buttons or checkboxes. Note that the type of question you have created, for example Single or Multi, specifies whether the images will replace radio buttons or checkboxes. Note also that these images may also be defined globally from the **Survey Settings > Layout** page. See Global Button Images in the Layout Tab Properties section for further information. For the Button images field, three options are available:

    - **Global Images –** a default value. The image URLs that are specified on the **Survey Settings > Layout** page will be used (see above).

- **No Images –** this setting overrides the setting from the **Survey Settings > Layout** page. Regular radio buttons and checkboxes will now be used for this question irrespective of the settings in Global button images (see above).
- **Custom Images –** this setting overrides the setting from the **Survey Settings > Layout** page, and allows you to specify image URLs for this specific question. When you select this option, additional input fields become available to enable you to input the URLs to the desired images (see below).

- **Image URLs –** These fields appear only when **Custom Images** is selected. Enter the URLs of the images you wish to be used instead of the standard radio buttons and .
  - **Default –** this image will be displayed when the mouse pointer is not over the image area and an answer alternative is not selected.
  - **MouseOver –** this image will be displayed when the respondent points the mouse at the button image.
  - **Selected –** this image will be displayed once the respondent has selected an answer alternative.
  - **Width, Height –** define the width and height of the images, in pixels.

Note: To ensure that any images used here are always available, you are recommended to store the images in the File Library (see File Library on page 157 for more information).

- **Auto-check Other –** [Single, Multi] The Other-Specify answer alternative will be selected automatically when the respondent starts entering text in the textbox. The feature:
  - Automatically switches on the radio button/checkbox when the respondent types text in the other-specify field
  - Automatically switches off the radio button/checkbox when the respondent clears the text from the other-specify field
  - Saves the text of the other-specify field when the respondent switches off the radio button/checkbox, displaying the text again when the radio button/checkbox is re-activated
- **Vertical Scrollbar –** [Grid, 3D-Grid] This feature will enable the respondent to scroll long grids without loosing sight of the column headers.
  - **Off –** Default. The feature is turned off.
  - **Automatic –** Confirmit will automatically assign an appropriate height to the grid and the scrollbar is active if necessary.
  - **Fixed –** This enables the survey author to specify the height of the grid in pixels and the scrollbar is active if necessary.
- **Horizontal Scrollbar –** [Grid, 3D-Grid] This feature will enable the respondent to scroll wide grids.
  - **Off –** Default. The feature is turned off.
  - **Automatic –** Confirmit will automatically assign an appropriate width to the grid and the scrollbar is active if necessary.
  - **Fixed –** This enables the survey author to specify the width of the grid in pixels and the scrollbar is active if necessary.
- **Slider –** [Single, Numeric, Numeric List, Grid - supports touch devices] This feature allows respondents to click and drag a slider bar and drop it on the answer alternative of choice, instead of selecting radio buttons (see Slider on page 262 for more information). When you select this option, you can then customize the look of the slider in the Question Inputs control in the Question Skin (see Question Skins on page 85 for more information). Note that for Numeric and Numeric List questions, the Slider option only becomes available once Upper and Lower limits have been defined in the Question Properties (see The General Tab on page 251 for more information). Selecting this option prevents the other options in Advanced WI Features being used. Additional slider-related selections become available:
  - **Slider Color -** [Single, Grid] appears when Slider above is selected. Allows you to select a color for the slider rows. Type a color code into the field or double-click on the color marker and select a color from the dialog box.

- **Size -** [Numeric, Numeric List] sets the size (width or height as appropriate) of the slider bar.
- **Vertical -** [Numeric, Numeric List] check to display the slider bar vertically.

Note: For a Single question which is set to Slider, the slider will be displayed vertically by default. To change the slider to horizontal, go to the Single question's General tab (see The General Tab on page 251 for more information) and set the List rows property to 1.

- **Card Sort** - [Grid - supports touch devices] activates the Card Sort functionality. The answers to the question are then presented as a deck of playing cards, with the scale being represented by a series of areas. The respondent answers the question by moving the cards into the appropriate area (see Card Sort on page 262 for more information). The various styles for the cards and drop areas are set up in the **Question Skins > Grid Question > Question Form Input** properties pane (see Question Skins on page 85 for more information). Selecting this option prevents the other options in Advanced WI Features being used. Additional card-sort-related selections then become available:
  - **Card Offset -** the offset for the stack of "unused" cards.
  - **Card Dropped Offset -** the offset for the cards once they have been dropped onto the "answer" areas.
  - **Card Layout -** specifies where the card deck is located relative to the answer areas. For example, Top-Bottom places the deck at the top of the page and the answer areas at the bottom.
- **Use Images in Answers** - [Single, Multi, Grid, depending on other selections] Check this box to use images for the answer options, instead of buttons or selection boxes (see How to Use Images as the Answer Options on page 247 for more information). Checking this box opens two further options:
  - **Image Width -** Specify the width of the image used.
  - **Image Height -** Specify the height of the image used.

Note: Use Images in Answers will not display a scale label for grid and multi grid questions in Mobile rendering as these question types will be split up into single or multi questions. If you use "Global button images" in Survey Settings then both images and labels will be displayed on desktop rendering, and on mobile rendering only the label will be displayed (Global button images are not supported on mobile).

- **Auto Scale Width** - [Grid] check this box if you want the scales of the grid to be adjusted automatically to the same width. The width adopted will be that of the widest scale label.
- **Star rating -** [Grid] select to display star shapes instead of a grid (see Star Rating on page 263 for more information).

Note: For Star Rating and Grid Bars - due to space limitations, for mobile rendering a maximum of 11 stars/boxes will be displayed. If more than 11 options are used in the grid, then when the question is displayed on a mobile unit it will default to normal mobile grid rendering.

- **Grid Bars** - [Grid - supports touch devices] check this box to change the answer layout from a tabular format to grid bars (see Grid Bars on page 264 for more information).
  - **Exclude non-weighted elements from bars -** this enables you to "exclude" specific scale elements from the grid bars for easier identification. If this box is unchecked, when the respondent hovers over or selects a scale element in the grid bar, all elements in the grid bar up to and including the selected item will be given the appropriate color. When this box is checked, if a scale element has no score, then when the respondent hovers over or selects that element in the grid bar, only that element will be colored. When the respondent hovers over or selects any other element in the grid bar, all the elements up to and including the selected item will be colored except the element with no score. This enables you to for example highlight a "Don't know" element in the scale.
- **Carousel -** [Grid] check this box to change the answer layout from a tabular format to Carousel format (see Carousel on page 265 for more information).
- **Horizontal rating scale -** [Single, Grid] check this box to present the answer options as a horizontal rating scale (see Horizontal Rating Scale on page 266 for more information).

- **Resizable mode** - [Open, Date, Open Text List - supports touch devices] you can allow the text fields to be automatically or manually resized while the respondent is typing text if the amount of text typed is greater that the current area will allow. The options are:

    - **Off** - resizing of the field is not allowed, the text field will remain at the specified size. In the event the respondent writes more text than can be displayed within the field, vertical scroll bars will be activated.

    - **Auto and manual** - in the event the respondent writes more text than can be displayed within the field, the height of the field will automatically be increased so the text can be viewed. In addition, grab-points are displayed so the respondent can resize the field as desired. Vertical scroll bars will be activated if required.

    - **Auto** - in the event the respondent writes more text than can be displayed within the field, the height of the field will automatically be increased so the text can be viewed. Vertical scroll bars will not be activated.

    - **Manual** - the text field has resize grab-points such that in the event the respondent writes more text than can be displayed within the field, he/she can adjust the height and width of the field manually so the text can be viewed. Vertical scroll bars will be activated if required.

- **Auto sum –** [Numeric List] this feature will automatically total the answers in a numeric list question. Note that with the Auto Sum property set, the numbers in the text boxes will be right-aligned regardless of the alignment in the HTML style setting for the input. The symbol displayed against this total field is by default the = sign. The default can be changed if desired; go to the Survey Messages page and change the "Auto sum equals sign" item (see How to Edit a Survey Message on page 191 for more information). To change the sigh for just one question, see Total Label below.

    - **Total label -** the text entered here will override the “Auto sum equals sign” survey message text for just this question. The field can contain piped-in text to allow for dynamic content.

- **Formatting Assistance** - [Numeric, Numeric List] check this box if you want the numerical answers to be formatted with the thousand separator and decimal symbol added automatically. The characters used will be dependent on the respondent's language standards. For example, if the question requires a numerical answer comprising 9 digits, 2 of which are decimals, it will be displayed as 1,234,567.89 (total digits and decimal places are specified on the General tab). Use the minus (-) character for negative numbers.

- **Drag-n-Drop ranking –** [Ranked - not supported on mobiles/tablets] enables drag-and-drop functionality for Ranked questions (see Drag-n-Drop Ranking on page 228 for more information). Note that if a Maximum or Equal value is specified for the question, only the allowed number of drop locations will be displayed.

- **Rank by click -** when this option is selected, the answers will be displayed as answer buttons. When an answer is selected, its rank order will appear on the left side of the answer button (see Rank By Click on page 230 for more information).

Note: Sliders are not supported for RTL (Right-To-Left) languages. Respondents viewing surveys in RTL languages will see the standard Confirmit survey interface.

Note: “Advanced WI features” such as sliders, autosums etc. are supported in IE8+ (Windows), Firefox 10+, Google Chrome 26+ and Safari 5.1+ on Mac, and "Dynamic Questions" is also supported on Safari 2 for Mac. Respondents using other browsers will see the standard Confirmit survey interface, with "normal" radio buttons.

7.4.3.12.3. The Translation Status Tab

For multi-lingual surveys, the Translation Status tab allows you to set the status of the translations for the page. This may be useful for example if you need to modify questions after they have been translated. A field is displayed for each language selected for the survey. Click the down-arrow beside the appropriate language field to open a drop-down list of the options, and select the required option. Note that this is merely a manual indication to the user of the current state of the question text - it is not updated automatically.

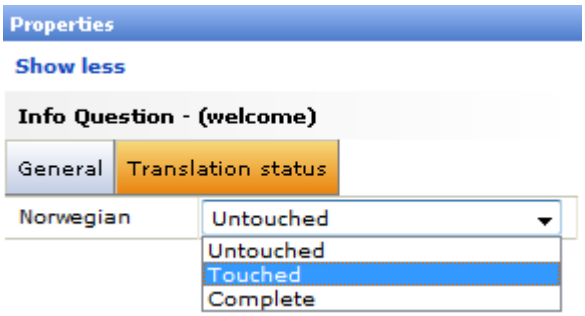


Figure 267 Example of the translation Status properties tab for a question

7.4.3.12.4. Slider

For Single, Numeric, Numeric List and Grid questions, a setting in the Advanced WI Features tab allows you to change the layout of the form to Sliders as shown below (see The Advanced WI Features Tab on page 258 for more information).

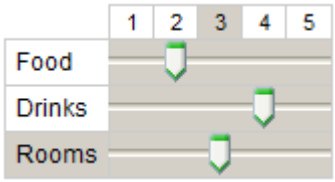


Figure 268 Example of sliders

To answer a question, the user either drags the slider pointer to the desired value, or they click in the slider row below the desired value and the pointer will move to that value.

When Slider is selected, additional properties become available depending on the question type:

- **Slider Color -** [all] allows you to specify the background color for the slider rows. Type a color code into the field or double-click on the color marker and select a color from the dialog box.
- **Size -** [Numeric, Numeric List] sets the size (width or height as appropriate) of the slider bar.
- **Vertical -** [Numeric, Numeric List] check to display the slider bar vertically.

Note: For a Single question which is set to Slider, the slider will be displayed vertically by default. To change the slider to horizontal, go to the Single question's General tab (see The General Tab on page 251 for more information) and set the List rows property to 1.

7.4.3.12.5. Card Sort

A setting in the Advanced WI Features tab allows you to change the layout of the form to Card Sort as shown below (see The Advanced WI Features Tab on page 258 for more information).

The answers to the question are then presented as a deck of playing cards, with the scale being represented by a series of areas. The respondent answers the question by dragging the cards into the appropriate areas.

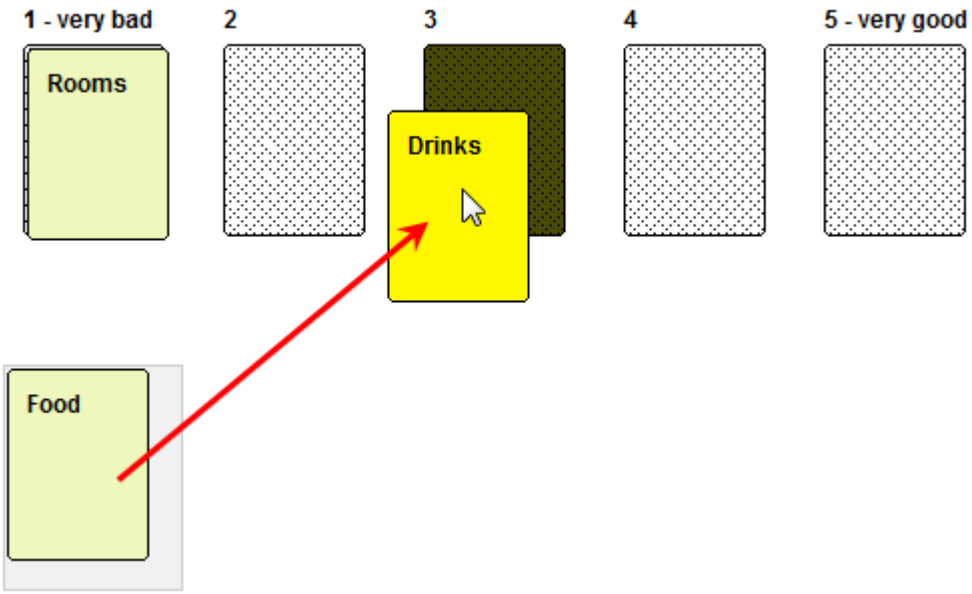


Figure 269 Dragging the question cards into the answer areas

The various styles for the cards and drop areas are set up in the **Question Skins > Grid Question > Question Form Input** properties pane (see Question Skins on page 85 for more information). Selecting this option prevents the other options in Advanced WI Features being used. Additional card-sort-related selections then become available:

- **Card Offset -** sets the offset for the stack of "unused" cards, such that the edges of unused cards lower in the pack are visible.
- **Card Dropped Offset -** sets the offset for the cards once they have been dropped onto the "answer" areas.
- **Card Layout -** specifies where the card deck is located relative to the answer areas. For example, Top-Bottom places the deck at the top of the page and the answer areas at the bottom.

7.4.3.12.6. Star Rating

Select the Star rating box to display stars instead of the boxes as below.



Figure 270 Example of using Start Rating

Any number of stars can be used; one will be displayed for each answer option in the grid.

Note: Due to space limitations, for mobile rendering a maximum of 11 stars will be displayed. If more than 11 options are used in the grid, then when the question is displayed on a mobile unit it will default to normal mobile grid rendering.

7.4.3.12.7. Grid Bars

A setting in the Advanced WI Features tab allows you to change the layout of the form to Grid Bars as shown below(see The Advanced WI Features Tab on page 258 for more information).



Figure 271 An example of a Grid question with the grid bars layout

As a special case:

If you wish to include "hint" texts at the ends of the grid bar rows, add your desired text separated from the scale values by <space><hyphen><space>. If for example you have the Answers and Scale set up as shown below (note the "- very bad" and "- very good" texts for the 1 and 5 grades in the scale):

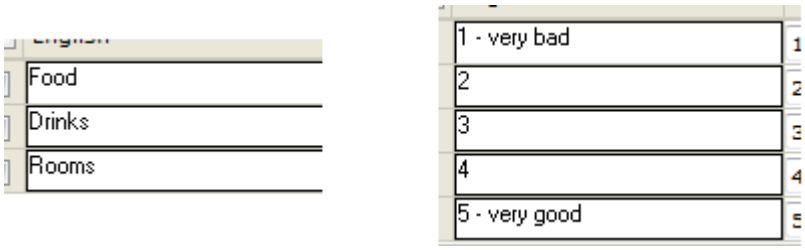


Figure 272 Answers and Scale setup

Then the layout will automatically be arranged as shown below, with the "very good" and "very bad" texts placed at the ends of the rows of selection boxes. Note that this also works with the Star rating box layout.



Figure 273 Resulting layout

Any number of grid boxes can be used; one will be displayed for each answer option in the grid.

Note: Due to space limitations, for mobile rendering a maximum of 11 boxes will be displayed. If more than 11 options are used in the grid, then when the question is displayed on a mobile unit it will default to normal mobile grid rendering.

When Grid bars is selected, an additional property becomes available in the Advanced WI Features tab:

- **Exclude non-weighted elements from bars -** this enables you to "exclude" specific scale elements from the grid bars for easier identification. If this box is unchecked, when the respondent hovers over or selects a scale element in the grid bar, all elements in the grid bar up to and including the selected item will be given the appropriate color. When this box is checked, if a scale element has no score, then when the respondent hovers over or selects that element in the grid bar, only that element will be colored. When the respondent hovers over or selects any other element in the grid bar, all the elements up to and including the selected item will be colored except the element with no score. This enables you to for example highlight a "Don't know" element in the scale.

7.4.3.12.8. Carousel

A setting in the Advanced WI Features tab allows you to change the layout of the grid form to Carousel as shown below(see The Advanced WI Features Tab on page 258 for more information). Note that if Carousel is selected, several of the other options that are normally available to grids will be hidden.

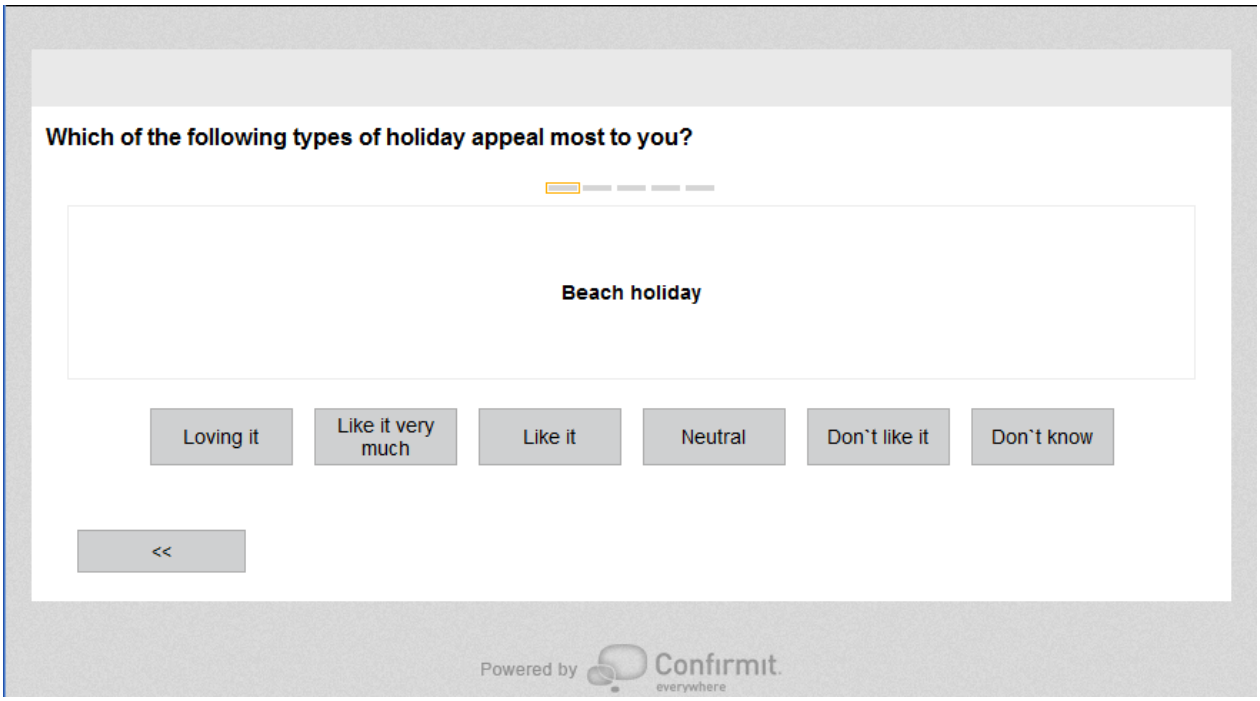


Figure 274 An example of a Grid question with the Carousel layout

The Carousel setting results in each grid statement being split into a separate view. The question text appears towards the top of the page, the first answer is presented, and the scale is presented below. The respondent selects their desired answer from the scale, and the next answer is then presented. A progress bar indicating the respondent's progress through this grid question is displayed below the question text. The survey's **Next** navigation button is displayed when the Carousel is completed.

The Star rating or Grid bar options can be used in combination with the Carousel to vary the layout.

7.4.3.12.9. Horizontal Rating Scale

This property is available in the Advanced WI Features tab for Single and Grid questions, as long as no other answer display options (such as Slider, card sort, images etc.) are selected.

When this property is selected, the answers for the question are displayed as a rating scale.



Figure 275 Example of a Single question using the Horizontal Rating Scale option

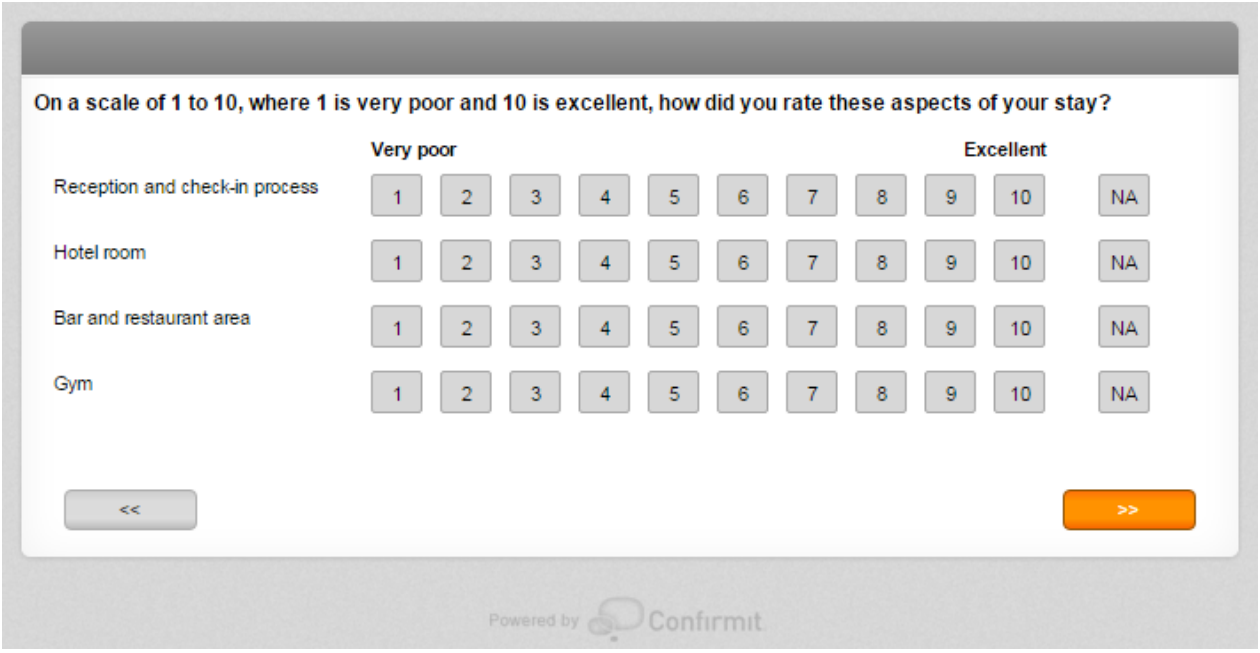


Figure 276 Example of a Grid question using the Horizontal Rating Scale option

If you wish to include "header" texts over the first and last answer options, add your desired text separated from the scale values by <space><hyphen><space>. If for example you have the answers set up as shown below (note the "- Poor" and "- Good" texts for the 1 and 10 grades in the scale), then the layout will automatically be arranged as shown in the Single question example above. Note that header texts can only be added to the first and last scored answer options.

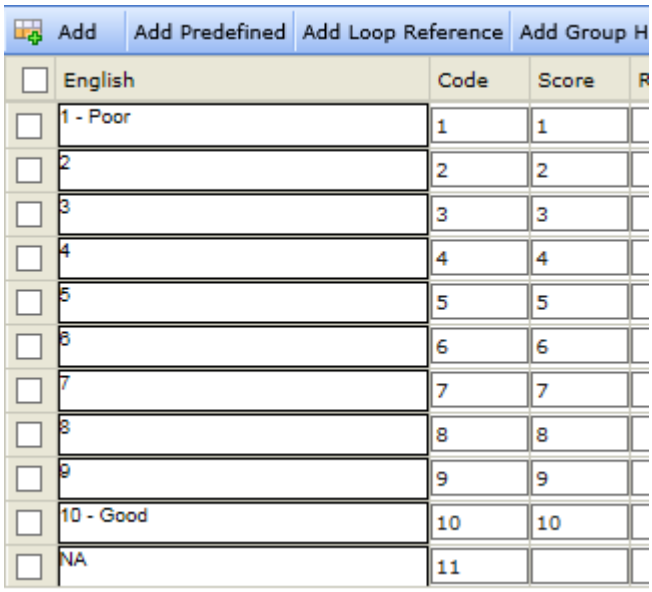


Figure 277 The question's Answers list

When the Horizontal Rating Scale property is selected, the "Exclude non-scored elements from scale" sub-option becomes available. This removes any answer options that do not have a score (see The Answer List Columns on page 244 for more information) from the list of answers available, and places them separately. This allows you to include for example a "Not applicable" option in the answer list, and as it does not have a score (see **NA** in the figure above) it will not affect your results.

In desktop rendering, any answer options with undefined score values are displayed to the right of the answer list, whilst in mobile rendering any answer options with undefined score values are displayed below the answer bar as radio buttons.

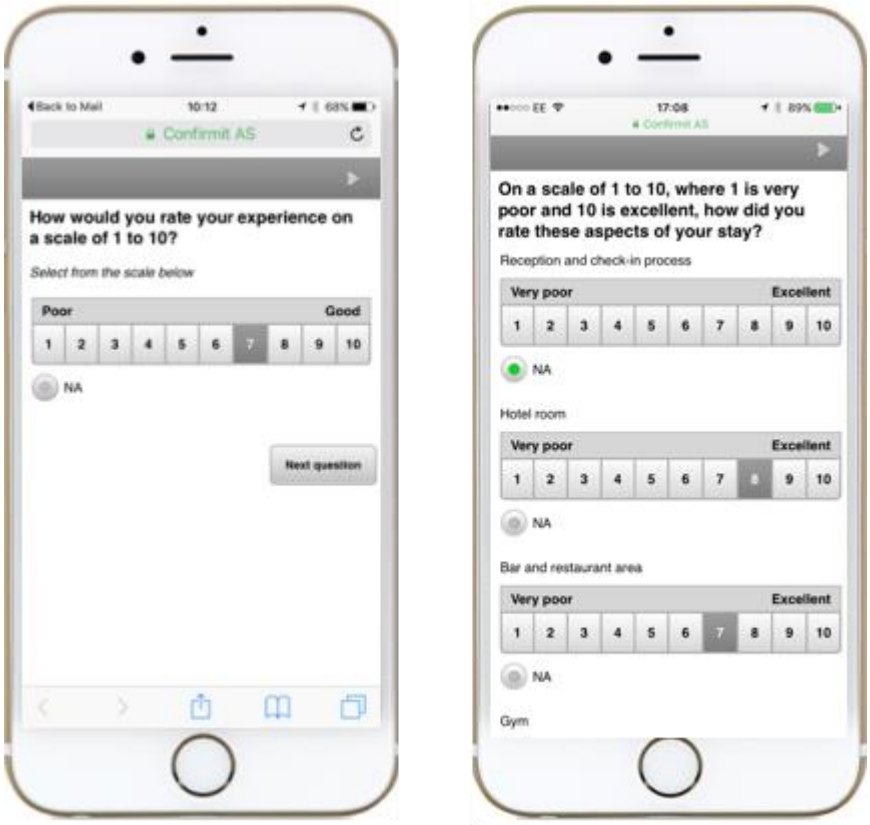


Figure 278 The same Single and Grid questions rendered on mobile

In mobile rendering, the space allocated to the answers is divided evenly between the options, so if there are fewer answer options then the answer buttons will be wider.

Note: If the question is to be presented in mobile rendering, then there can be a maximum of 11 answer options (for example, options 1 to 10, and N/A). In the event the question has more than 11 options, it will be rendered as a standard single question.

Note: Internet Explorer cannot render the iPhone/Android preview correctly. When previewing the questions in these modes you must therefore use either Chrome or Firefox.

7.4.3.13. Predefined Lists

Cases may well arise in which you wish to reuse one or more scales, or one or more brand-lists, product-lists, etc. several times in a questionnaire. Confirmit allows you to predefine such lists, and reuse them in forms (see Answers on page 237 for more information), or even in other lists (nested lists). If you change the contents of a list, this change will be reflected in all questions that use the changed list.

To create a predefined list:

1. Drag a Scale/List object from the **New Objects** folder to the **Reusable scale/list** folder, or right-click on the **Reusable scale/list** folder and select **Insert Scale/List** from the drop-down menu.

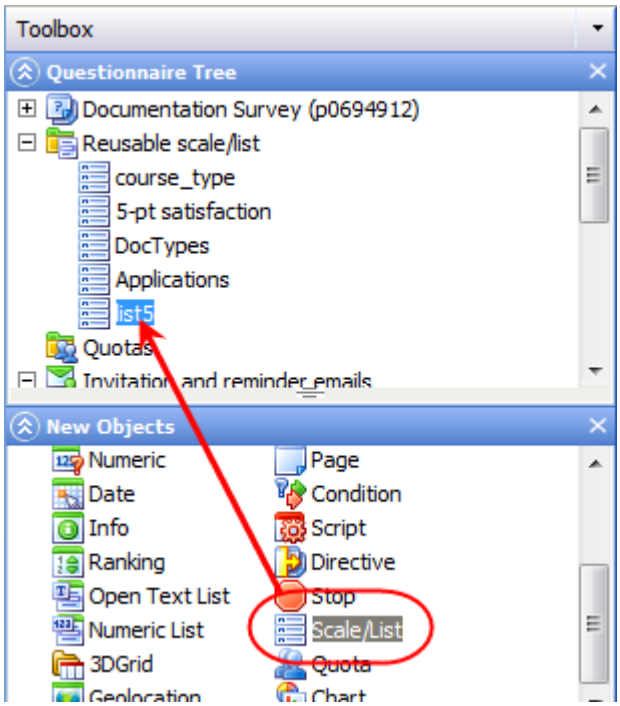


Figure 279 Inserting a Scale/List object into the Scales and Lists folder

A new list is created in the **Reusable scale/list** folder and its Details page opens. If you wish to return to a list at a later time, double-click on the list in the **Questionnaire Tree > Scales and Lists** folder to open its Details page.

2. Create the list in the same way as for a standard answer list.

- **List ID** - a descriptive name for the list. The List ID is the text that is displayed in the drop-down list when inserting the predefined-list in another form or list. Note that the List ID cannot contain Unicode characters.
- **Exclude Translation -** check to exclude the list from the translator interface (see Translator on page 433 for more information).
- **Use Images in Answers -** check this box if you wish to use images for the answer options, instead of buttons or selection boxes (go to How to Use Images as the Answer Options for more information).
- **Left and right text -** check to allow right-texts in the predefined list. Note that these will only be used when the question using the predefined list is enabled as a right-text question.
- **Answers** - The answer-list behaves like the list in forms and loops (see Answers on page 237 for more information).
- **Scratchpad** - The scratchpad is a text editor available in several screens (see Scratchpad on page 316 for more information).

Important
As from Confirmit v18, codes are mandatory for all the answers in predefined lists. If you do not add codes manually when you create the list then consecutive numerical codes (e.g. 1, 2, 3, 4 etc.) will be added automatically to the list when it is saved.
If the predefined list is added to another list that contains additional answers then the codes used by the two lists may conflict. In this event a message will be displayed and you will be given the opportunity to resolve the conflict (see Conflicting Answer Codes on page 242 for more information).

You can copy and paste text directly from MSWord into the text fields. Note however that this copying process can take with it considerable amounts of unnecessary HTML formatting code, and this code will increase the file size and can create problems for later text formatting within Confirmit. Click the **Clean HTML...**button  to remove this unnecessary code. Note that this functionality will keep intact the majority of "desirable" formatting code, such as bold, italics, text color etc.

Note: It is not possible to have a header in a scale of a grid inside a 3DGrid. If you include a header in a predefined list and that list is used in a scale, then the header is ignored.

Note: While a predefined answer list is being used in one or more questions it cannot be deleted from the Questionnaire Tree. If you attempt to delete a list while it is in use, a warning will be displayed containing the question IDs of those questions in which the list is being used.

7.4.3.14. Searchable Answer Lists (Searchable Multis)

In the event the answer list for a Multi question is very long, for example hundreds of options, you can provide the respondents with the possibility to search the answer list so they can more easily find the answers they wish to use. To do this, go to the question's **Properties > Advanced WI Features** tab and check the **Searchable answer list** box (see The Advanced WI Features Tab on page 258 for more information). The functionality then available to the respondent is as follows (note that in this example the answer list is not very long, but the principles are the same).

Important
This functionality relies on JavaScript. If JavaScript has been disabled on the respondent's PC, or if the survey is being rendered in the Generic Mobiles mode (selected in the Survey Settings > Survey Channels page, then this question type should not be used. It is possible to test if JavaScript is enabled and also if the rendering mode supports this question type by using the following expression:

DynamicQuestionsEnabled() && GetRenderingMode()=="desktop"

If the above code is added to the Question Mask of a searchable multi, then the question will be skipped if it is not possible for the searchable multi question to function correctly.

When the relevant Multi question is presented to the respondent, it will include a "Search" field above the answer list and a "Selected" field below, as shown below.

Note: In the event the answer list is very long, the list will initially display the first 100 answers with the option to search (through all the answers, displayed or not). In addition, below the list will be a Load More link. Click this link to load the next 100 answers into the list. The link will remain visible until there are no more answers to load.

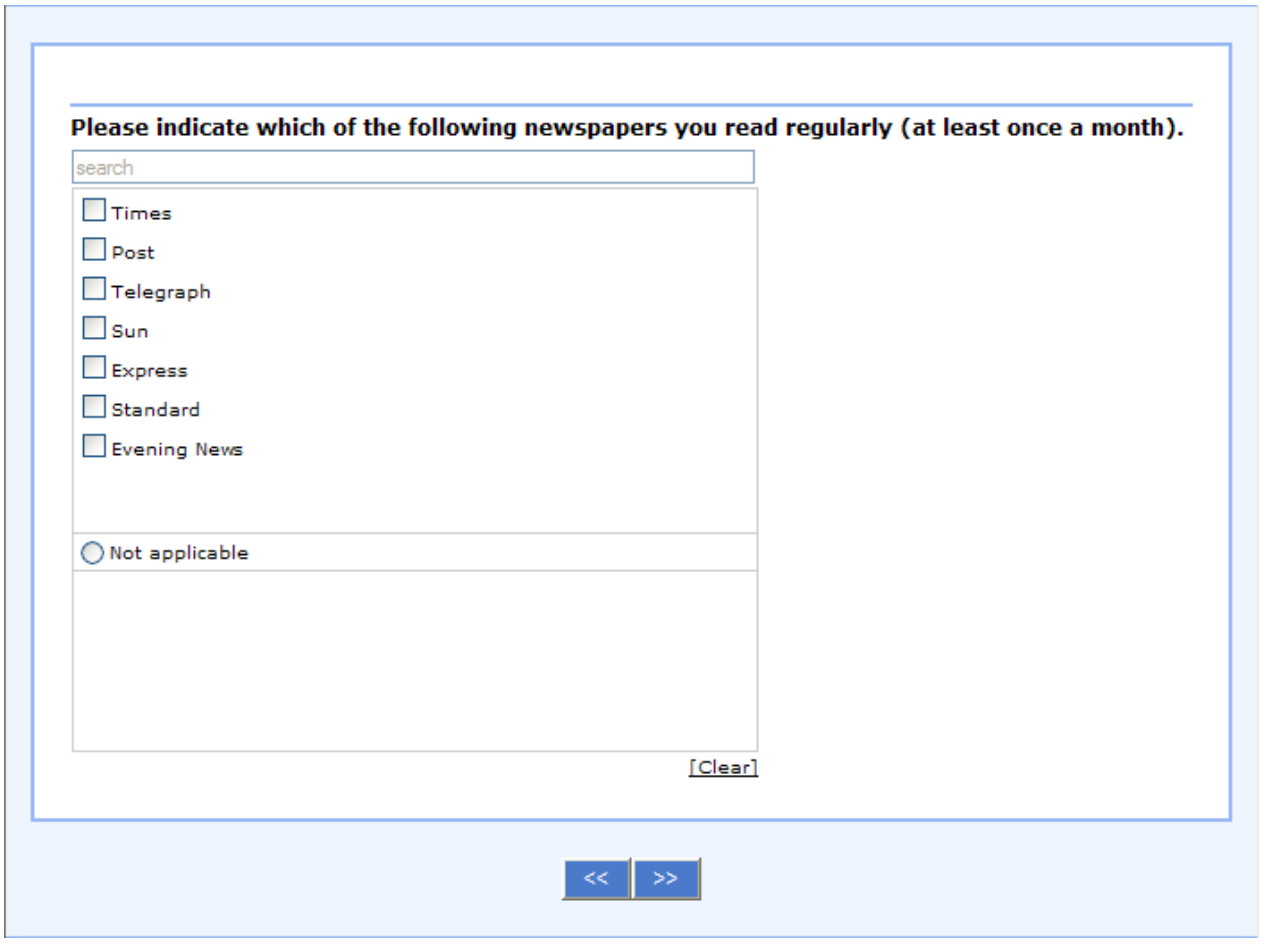


Figure 280 Example of an answer list with the Searchable property activated

The respondent can start to type the first characters of the desired answer into the Search field, and the answer list will reduce to include only those answers that correspond to the characters typed. In this example the respondent has typed the letter "t" into the search field, so all answers that do not start with the letter "t" have been removed from the list .

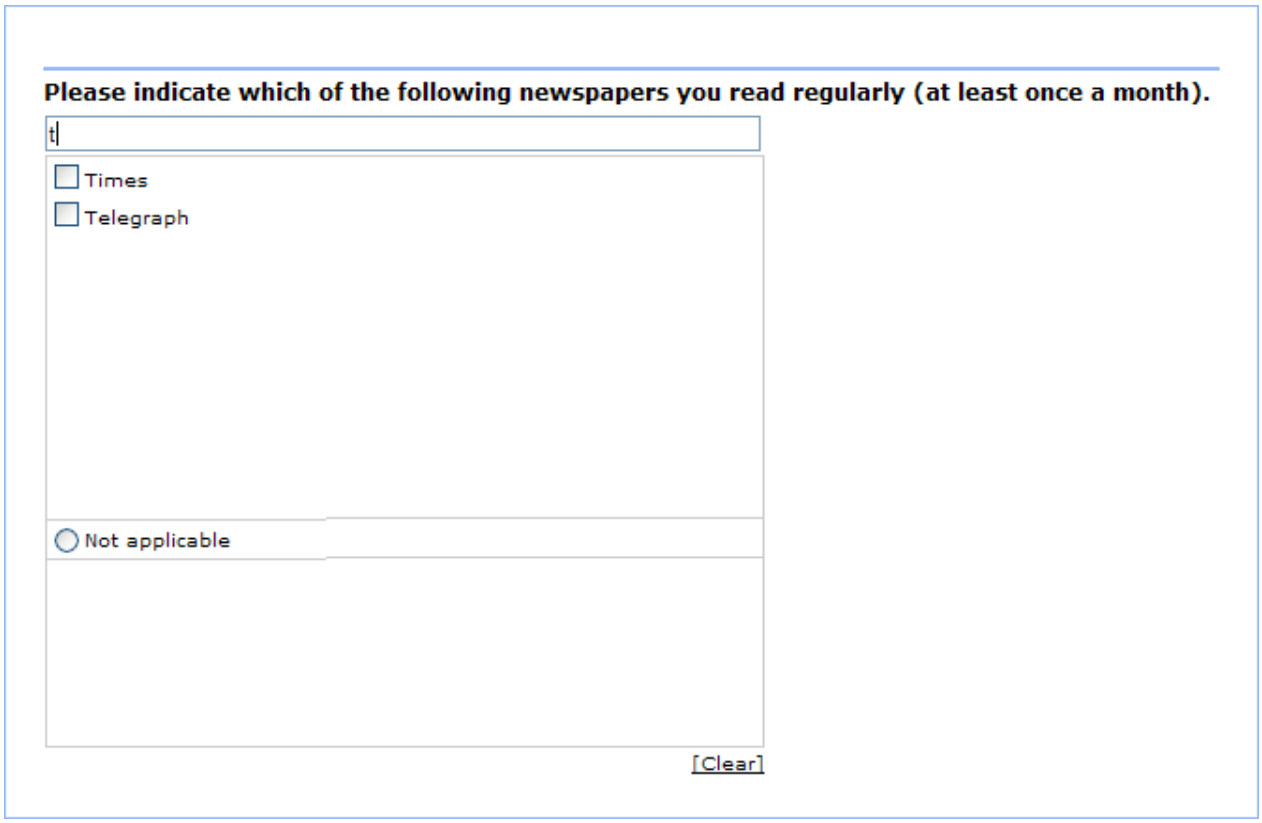


Figure 281 The answer list reduces as characters are typed into the search field

When the list is reduced enough that the respondent can find the desired answer easily, he/she can select that answer and it will be copied to the Selected field below the answer list.



Figure 282 An answer is added to the Selected Answers field

The respondent can then return to the search field, clear it and type in new search characters to find more answers as required.

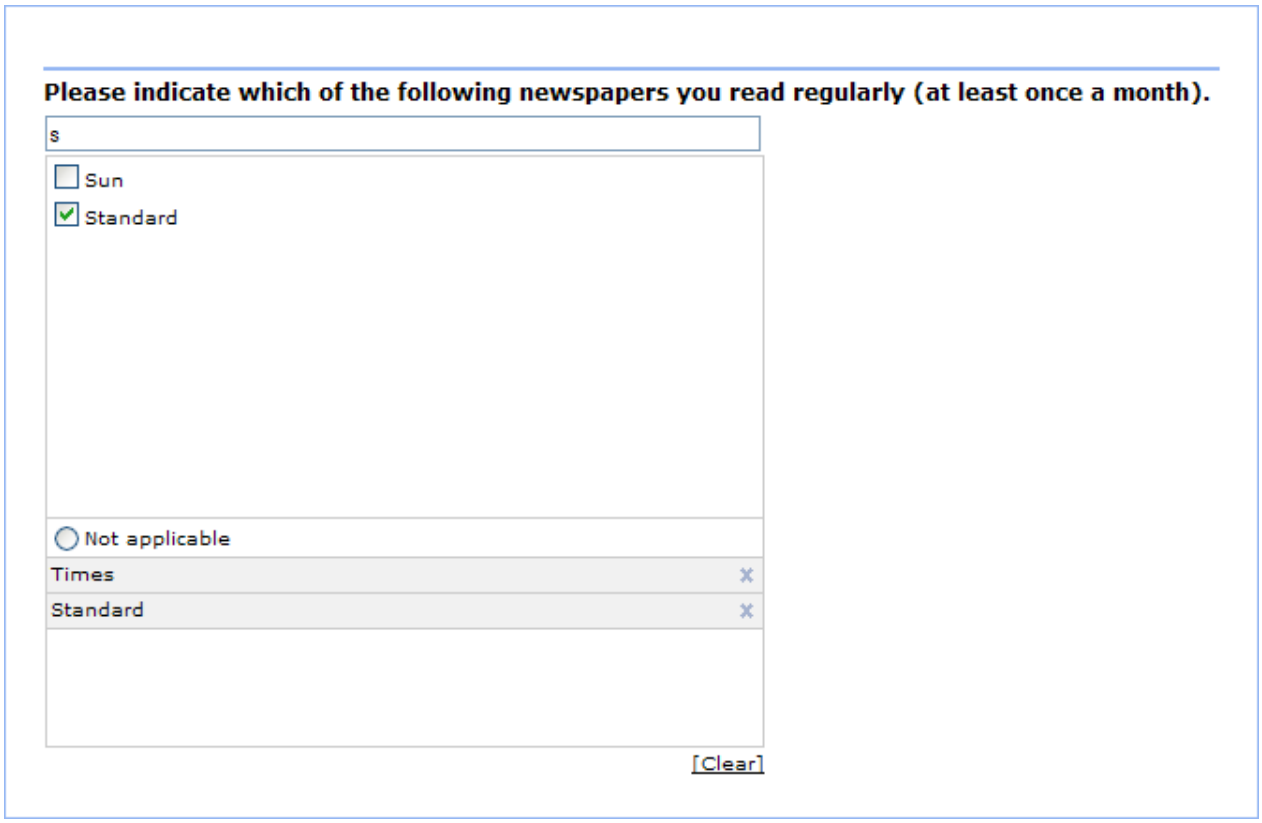


Figure 283 Finding further answers using other search characters

Once the respondent has found and selected all the desired answers, they merely click the **Next** button as normal to progress to the next question.

7.4.3.15. Randomization

Randomization in computers is actually "pseudo-random" – it is based on an algorithm that when given a seed will return a seemingly random order. Normally, time is used to provide the seed-aspect. However in Confirmit the responseid value is used (this being the unique system id that is assigned to a respondent the first time he/she opens the survey). This means that the order for a given respondent will be the same every time such a randomization takes place. For example, if the order of some questions on a page is randomized and the user re-opens the page, or clicks **Next** and then **Back**, the order of the questions is preserved for that user.

The same randomization pattern is also used when an answer-list is reused in several questions. For a given respondent, the answers listed will therefore be presented in the same randomized/rotated/flipped order for all questions when you use the same answer-list. It is the number of items in the answer-list that determines the randomization pattern.

Confirmit has several areas in the functionality where "answer-list randomization" is used. These areas include answer list display orders for all question types, column display orders for 3D-Grid questions, loops and blocks, rotation and flip.

Rotation displays answers in a rotated order – for example 3,4,5,1,2, and the start number will be random. Flip displays answers either incrementally or decrementally (i.e. either 1,2,3,4,5 or 5,4,3,2,1) – which of the two orders is selected for a particular instance is random.

If the user wishes to create his/her own randomization, or for example randomly pick x number of respondents, this can be done through scripting with the Math.random() method. Refer to the Confirmit Scripting manual for examples.

7.4.4. Conditions

Using Condition objects, you can create "Skip logic" in your questionnaire. To create and edit a Condition, insert it into the questionnaire tree, and then double click it. You insert conditions wherever you want to alter the flow of a survey.

A condition object consists of three parts; an IF condition, a THEN clause and an optional ELSE clause.

The flow is controlled by a Boolean expression in the IF condition. The expression evaluates to either TRUE or FALSE. If the expression evaluates to TRUE, the survey-mechanism will execute the routing objects in the THEN node. If the expression evaluates to FALSE, the objects in the ELSE node are executed (when the ELSE node exists). The example below shows a conditional object in the questionnaire tree.

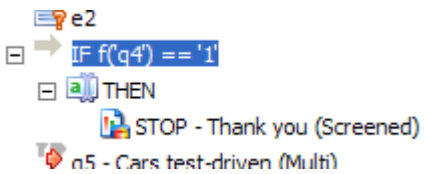


Figure 284 A Conditional node

The expressions in the IF condition are written using JScript (see Confirmit Scripts on page 448 for more information). To help to build expressions Confirmit has included a Expression Builder tool (see How to Use the Expression Builder on page 277 for more information).

Note: If you change a condition from IF-THEN-ELSE to IF-THEN, any questions remaining in the ELSE branch will be deleted. If you wish to keep these questions, move them elsewhere in the Questionnaire Tree before you save the condition.

7.4.4.1. Description of Fields

- **Expression –** a JScript-expression evaluating to *true* or *false* (see Confirmit Scripts on page 448 for more information).
- **Branches –** select whether or not the condition should include an *ELSE* branch.
- **Deleted –** used the same way as in forms. When you delete a condition from the questionnaire tree, it is not permanently deleted, but the “deleted” flag is set. If you turn on *Show deleted nodes* (see Editing the Routing on page 313 for more information), you can undelete the object by unchecking this flag, or delete the object permanently.
- **Do not perform data cleaning –** you may wish to allow the respondents to modify their answers. If a respondent takes advantage of this and moves back and forth in the questionnaire and changes his/her answers, then answers already given later in the survey may not be consistent with the changed answers. To ensure consistency in the data, if a condition evaluates to FALSE, any answers previously given to all questions inside the THEN folder are deleted. (If the condition evaluates to TRUE and has an ELSE folder, all the answers to the questions inside the ELSE folder are deleted.) However sometimes you may not want to delete the previously entered data. This could for example be in a questionnaire where the respondent is allowed to re-enter, but will only be given access to some of the questions or a different set of questions than the first time. Check this property to prevent deletion of the answers inside a THEN or ELSE folder. A check will be run to discover whether this is the first or subsequent time the user accesses the survey.

Note: From Confirmit v15, Hidden questions in Conditions are also "data cleaned".

Important
If you change the "Do not perform data cleaning" property on a condition, the setting is NOT passed on through all nested conditions - you must change the setting separately for each nested condition.

Note: The default setting for the "Do not perform data cleaning" property (checked or unchecked) can be set at the company level by the system administrator.

7.4.4.2. How to Use the Expression Builder

The Expression Builder helps you to build JScript expressions. To use the Expression Builder:

1. Activate a condition object either by double clicking on its IF branch, or by right-clicking it and selecting **Edit** from the menu.

   The Expression Details form opens.

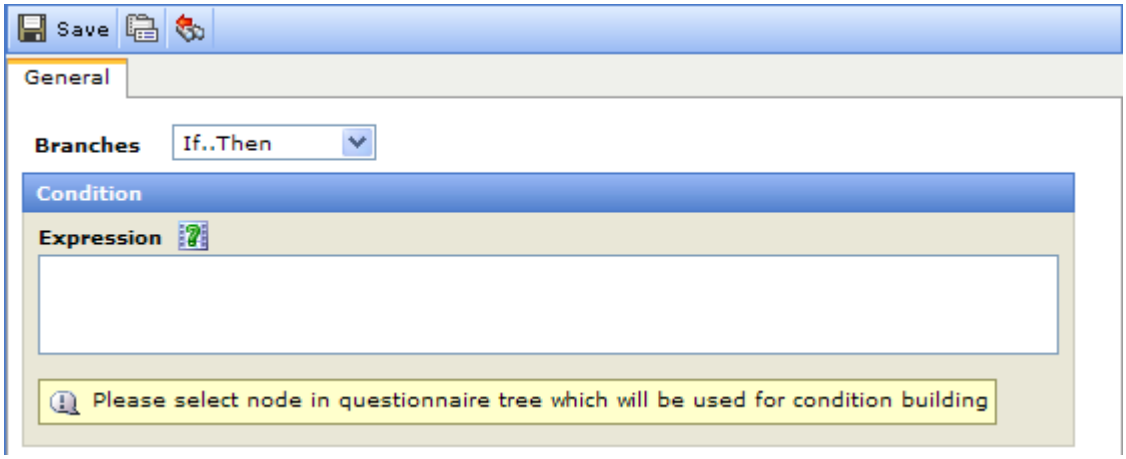


Figure 285 Example of the Expression Builder

   The expression must be based on a question, so:

2. Single-click on the question in the Questionnaire Tree on which you want to base your expression (double-clicking will activate form-edit mode).

   The Expression Builder for the chosen question opens.

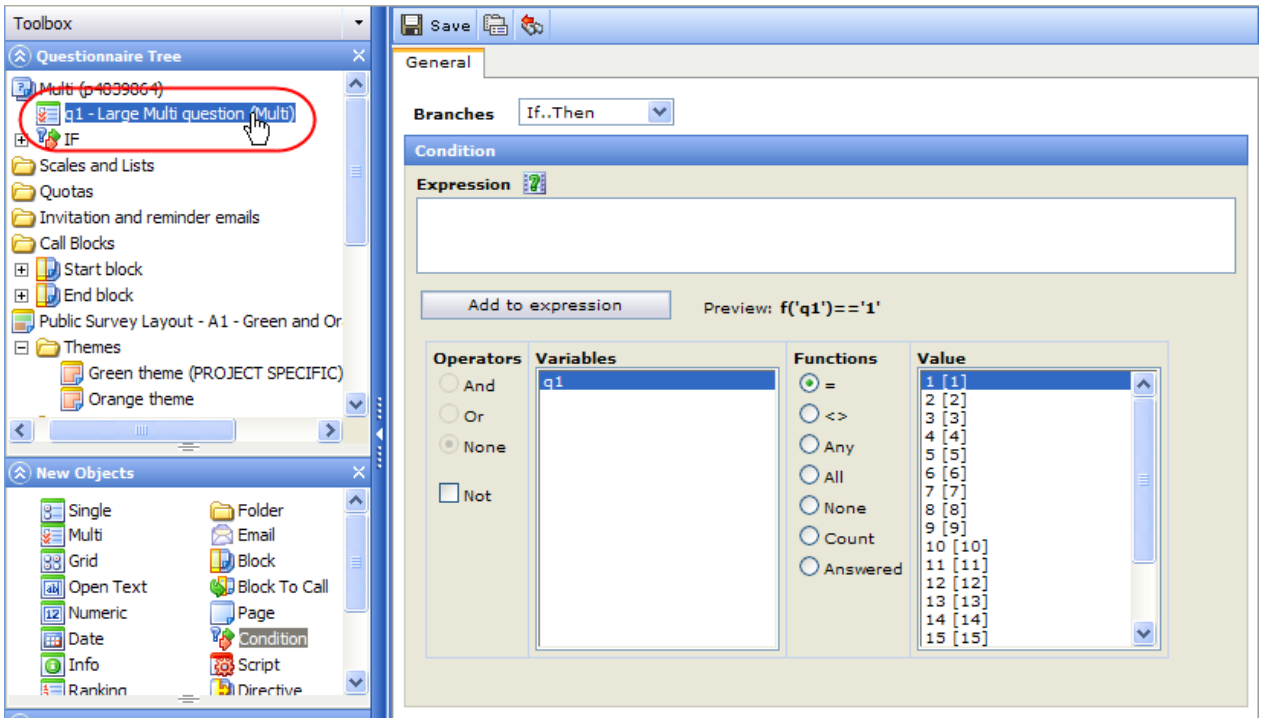


Figure 286 The Expression Builder form for the multi question

Note: If you select a question type that is not supported in the Expression Builder, for example a Date object, then the message "Enter expression in the area above" is displayed. You can then type your expression into the field "manually".

You can now build the expression in the Preview area. Once the expression (or part of the expression) is as required in the Preview area, click **Add to expression** to add it to the Expression field. Note that the Preview expression will be added to the Expression field at the cursor position.

The Expression Builder consists of four columns:

- **Operators -** This lists the operators you can apply to the question object in focus. Only those operators that are valid for the current cursor position in the expression will be available. The list will be different for each type of question because the various question types support different methods. Click on an item in the list to insert the operator into the preview.
- **Variables** - This shows the question ID of the selected question. If the question is a grid, each of the answers in the grid (which are themselves single questions) will be shown. Click on an item in the list to insert a reference to the question in the preview.
- **Functions** - This is a list of the functions you can apply to the question in focus. The list will be different for each type of question because the various question types support different methods. Click on an item in the list to insert the function into the preview. Note that only functions that are applicable to the current cursor position will be available; all others will be grayed out. Function inputs are restricted to logical values; for example, a Length value must logically be numerical, so only numerical values can be input. Hover the cursor over a function to show a tool-tip describing the function.
- **Value** - This list shows the answers for the selected question, with the code in square brackets. Click on an item in the list to insert the code into the preview.

These lists allow you to build complex expressions without having to remember the JScript-syntax. You can at any time single-click another question in the Questionnaire Tree to expand your expression.

Note: The symbols listed in the Functions column and the symbols used in the expression may differ. Those shown in the Functions column are generally recognized as being the "international standards" for the relevant functions, whereas the symbols used in the Preview and Expression fields are those used in JScript.

The single/grid operators are as shown in the table below:

Description	Symbol
Logical NOT	!
Less than	<
Greater than	>
Less than or equal to	<=
Greater than or equal to	>=
Equality	==
Inequality	!=
Logical AND	&&
Logical OR	||

The multi operators/methods are as shown in the table below:

Description	Method/operator
Includes	.inc(
Union	.union(
Intersection	.isect(
Difference	.diff(
Logical AND	&&
Logical OR	||
Logical NOT	!
End parenthesis	)
Comma	,

To build effective conditions you must be aware of operator precedence. When Confirmit evaluates conditions, the operations are performed in a controlled order. Operations with a higher precedence are performed before those with a lower one. The table below shows this order from highest to lowest.

Precedence	Operator
7	()
6	!
5	<, <=, >, >=
4	==, !=
3	&&
2	||
1	=

Use parentheses to change the order of evaluation of operations. Expressions in parentheses are fully evaluated before the value is used in the rest of the expression. Each part in a condition must be a complete statement. For example: Assume you have an age question with five answer alternatives and you want to include a condition that selects only respondents who have answered '1' or '2'.

The correct condition is:

```
IF f('q3') == '1' || f('q3') =='2' THEN…
```

The condition below does not use the correct syntax:

```
IF f('q3') == '1' || '2' THEN…
```

Note: You can see from the expressions above that the codes 1 and 2 have apostrophes before and after. This is because the "codes", i.e. the answers to questions, are always stored as strings in the database. You must therefore be careful when using the greater than (>) or less than (<) operators in expressions.

Consider how you sort items alphabetically (as in a dictionary). When treated as strings, a sequence of numbers 1,2,3,…,10,11 will be sorted as: 1,10,11,2,3,…,9. So f('q1')<'3' will be TRUE for the numbers 1,10,11 and 2. If you are constructing an expression with greater than or less than you should convert the codes to numbers. Use a method called .toNumber() to convert.

Example:

```
f("q1").toNumber()<3
```

Using this, the expression will be true for 1 and 2, as expected (see Confirmit Scripts on page 448 for more information).

Always test your survey to see whether the condition works as intended.

7.4.5. Directives

Directives contain instructions to the WI generator. Six different directives exist, which are used to control page break insertion, navigation and progress bar start and end points. By default, a Directive will be set to Multiple questions per page.

- **Multiple questions per page** - Confirmit groups as many questions on a page as possible.
- **One question per page** - Confirmit inserts a page-break between each question, so only one question appears on each page .
- **Progress bar begin** - the progress bar starts from this point. This allows you to have some questions or pages, for example information or personal questions, before the progress bar starts, so you can keep the progress bar just for the "survey questions".
- **Progress bar end** - defines the end point of the progress bar. This allows you to place information or other pages, for example a "thank you" page, outside of the progress bar, keeping the bar only for the "survey questions".
- **Forward navigation only -** a theme can be used to remove the **Back** button from the interview pages, but this method is not fool-proof; it is possible to work around it. This directive removes the **Back** button from subsequent interview pages irrespective of whether or not the button is included in the survey's layout, if the condition logic is met. Note that if the interview's survey settings require the browser **Back** button to act like the survey **Back** button, when this directive is in use the browser **Back** button will not function for the survey. Use the Survey defined navigation directive to re-display the **Back** button. Note also that this directive will take effect even if it is located inside a condition that is skipped.
- **Survey defined navigation -** when a Forward navigation only directive had been used to remove the **Back** button, use this directive to re-display the button according to the survey settings and theme currently in use.

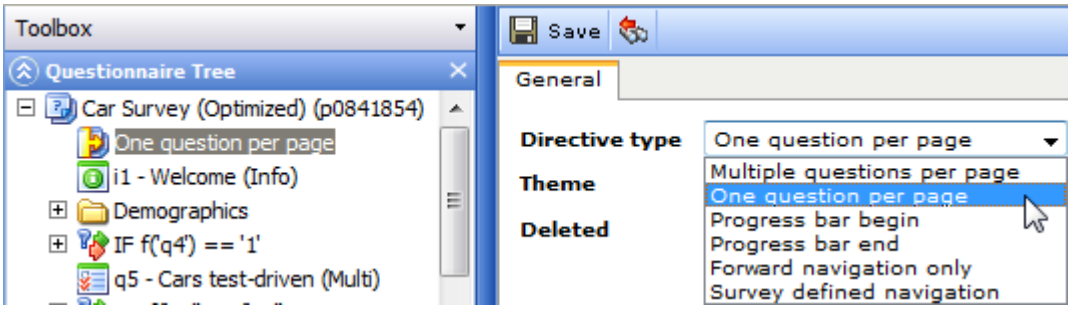


Figure 287 Selecting a Directive type

Confirmit evaluates all logic on the server. When the “multiple questions per page” directive is in effect, forms will be grouped on the same page unless the WI generator:

- encounters a condition, script node, or a new directive in the survey definition,
- detects a dependency between two forms as a result of text piping that prevents them from being displayed on the same page, or
- is unable to determine whether there could be a dependency between a form and those that have already been added to a page.

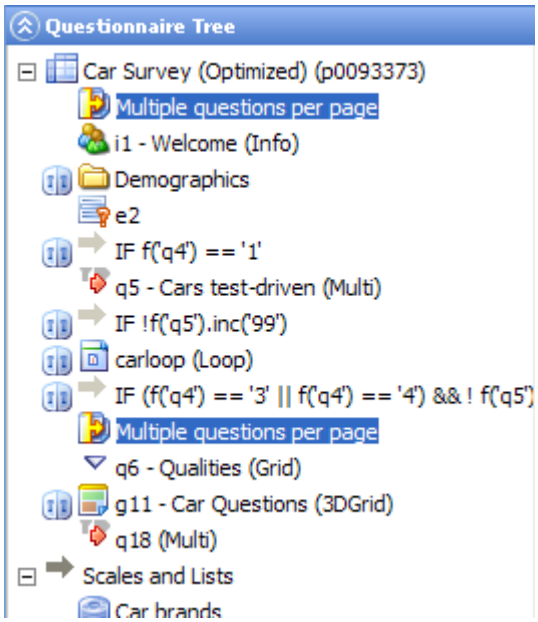


Figure 288 Example of a multiple questions directive

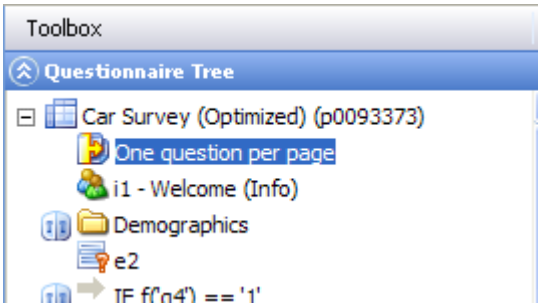


Figure 289 Example of a single question directive

Progress bars are displayed if the Web interview is generated with the Include Progress Bar option selected in the **Designer > Survey Settings > Layout** tab. The progress bar will display as a fraction of the number of questions displayed on pages up to and including the current page relative to the total number of questions between the progress bar start and end points. If a survey contains no progress bar directives, then the progress bar start and end points are the beginning and end of the survey. Progress bar directives give the survey author the ability to insert multiple progress bars in the survey, which is useful if the questionnaire consists of several distinct sections and only a small fraction of the questions apply to each individual respondent.

Note: Progress bar directives cannot be nested. A "Progress bar begin" directive that appears after a previous unmatched Begin directive will be ignored, as will a "Progress bar end" directive that is not preceded by a Begin directive. No progress bar is displayed before the initial Progress bar begin directive and no progress bar is displayed after the final progress bar end directive.

7.4.6. Stop-Nodes

A Stop node in the questionnaire will end the interview. This is mainly used for screening-purposes, and to end the interview at various places in the routing.

- **Interview status after stop code** - select the appropriate code to set on the Stop object. The options are:
    - **Complete** - the web interview is to be considered a completed interview. The respondent data status is set to "Complete", and the end time of the interview is registered.

- **Screened** - use this status-code to mark the interview as "Incomplete due to screening". The respondent data status is set to "Screened" and the end time is set.
- **Quota full** - the interview is stopped for a certain group of respondents as the quota for that group is full (see Quotas on page 356 for more information).

Note: If the CATI channel is selected for the survey, an additional option becomes available.

- **No change** - allows for Stop nodes to be issued that do not change the current Confirmit Status value. In a CATI interview this is essential as the Extended status codes are used to classify call outcomes, for example No reply, Busy, appointment etc. In the Confirmit Status list these are all "Incomplete". The "No change" option therefore allows the status to be left "as-is" - Incomplete. When operating in a multimode context the "No change" value is applicable to ALL modes. If the CATI mode is disabled for the survey, then the value is automatically changed to "Complete".

- **Extended Status** - available only when CATI is selected. This allows the 'stop' status to be defined more accurately, and is intended primarily for use with CATI interviews that store the outcome of the call for the interview record. The extended status is a numeric value corresponding to the 'Extended status' list within the CATI Supervisor. Refer to the CATI Supervisor's Manual for further details.
- **Deleted** - check and save to delete the node. Right-click on the survey name, select Show Deleted and uncheck the box, to reinstate the node in the survey.
- **Exclude Translation** - check to exclude the node from the translator interface (see Translator on page 433 for more information). This allows you to hide nodes that are used for internal programming purposes from the translators in Confirmit Translator.
- **Theme** - the themes available to the survey are listed in the drop-down list. For the Theme setting to be applied, you must specify your own title and text in the appropriate fields.

The Stop node can also be used at the end of the survey, if you want to customize the last survey page instead of using the system-generated "Thank you" page.

Note: This functionality will work only when the WI is generated with a .NET interview engine (see Preparing for Data Collection on page 492 for more information).

The title and the status set on the stop node will be displayed in the questionnaire tree in the same ways as question IDs and titles are displayed. The message presented to the respondent can be presented in the selected language if it is translated in the node fields.

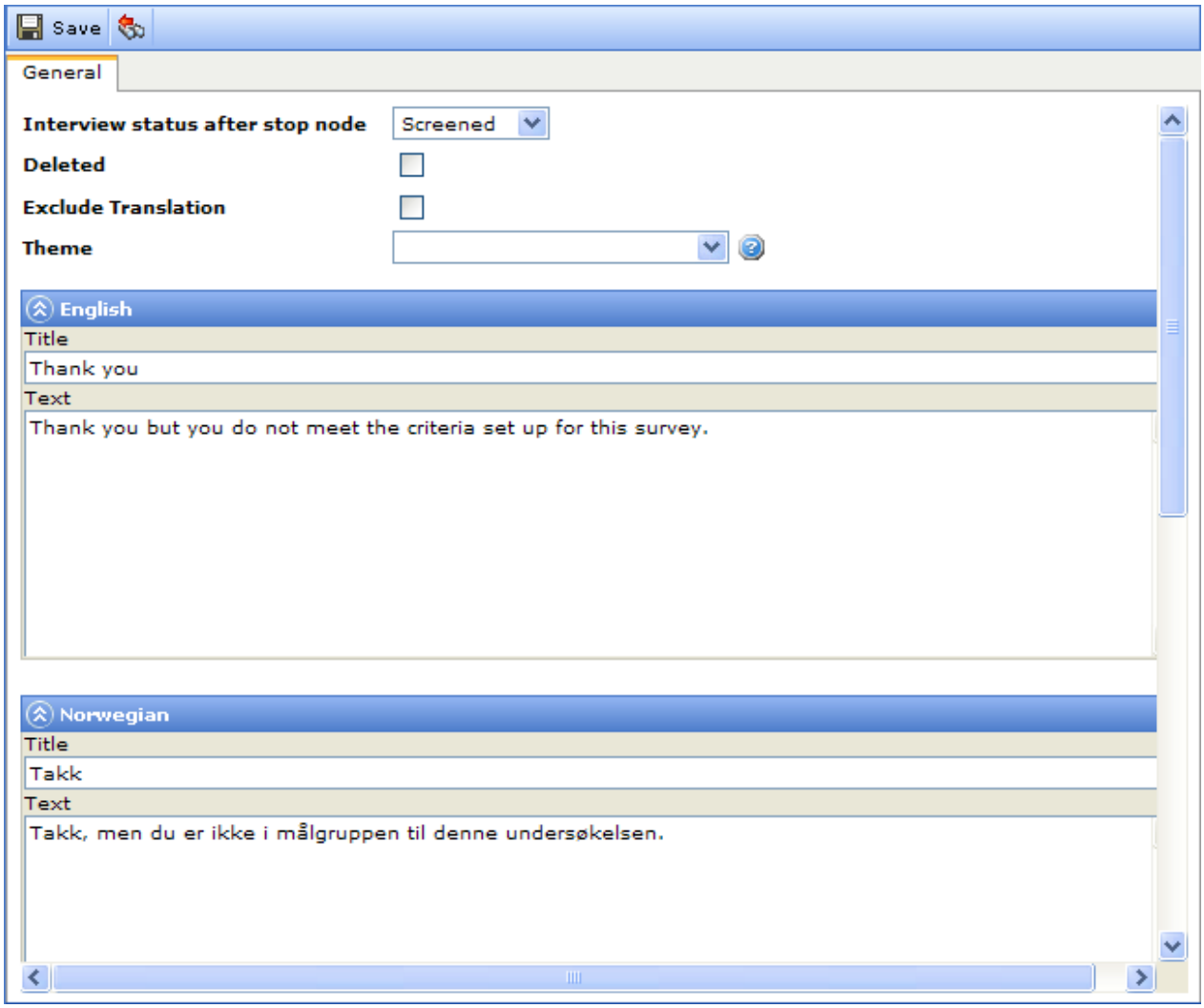


Figure 290 Editing the text in a STOP node

7.4.7. Script Objects

For advanced routing, on-the-fly recoding, redirects, calculations on answers to questions or other programming efforts, you can insert script-objects that will run JScript-code when executed. When using script objects, care must be taken to create codes that will run without errors. JScript is an interpreted programming language, which means that the code will only be checked at run-time. You should always perform thorough testing of questionnaires that include script objects (see Confirmit Scripts on page 448 for more information).

Example:

You can use a script object to for example change the status for the respondents before they have actually finished the interview. You may have some pages at the end of your interview after the final "data question", and it would then be possible for a respondent to end the interview by closing their browser after having answered all your questions but before the final page is reached. This could result in an "incomplete" status for the respondent even though you have got a full set of data from them. To avoid this you can include a SetStatus script in the survey immediately after the last question but before the additional pages. The script required in this case would be:

```
SetStatus('complete');
```

As the respondents pass the script node their status will then be set to Complete even if they end the interview before reaching the last page.

Refer to the Confirmit Scripting Manual for further details.

Note: For Optimized database surveys, if a survey scripter attempts to set an unknown code on a single, grid or 3D-grid, the value is ignored (not set), and a warning email is sent to the survey owner. The respondent will not see any errors. In a similar fashion, if a scripter attempts to set a value that is longer than the field width, the value is truncated and an warning email is sent to the survey owner. Again, the respondent will not see any errors.

7.4.7.1. Predefined Scripts

In a Script object and the Masking tabs for many of the question types, you have the option of using predefined scripts. These are scripts that have been developed and tested by Confirmit, and are intended to simplify scripting operations for the users. In the Script object, the predefined scripts available can be used as they are, or you can convert them to script code and use them as the start point for more complicated scripts. In the Masking tabs, the predefined scripts are used "as-is".

1. In the script object, or on the Masking tab when available, click the down-arrow beside the Select Predefined Script field, and select the script you wish to use.

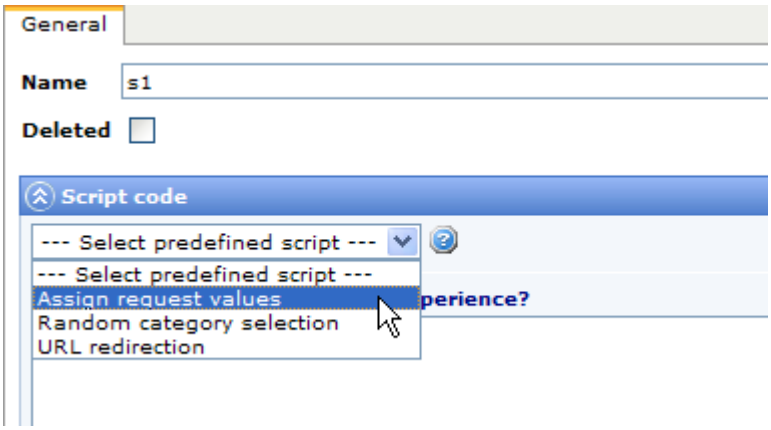


Figure 291 Selecting a predefined script for a Script object

Note: The list of predefined scripts available in the Script nodes and Masking tabs will be expanded as commonly-used scripts are developed and tested. Note that some scripts may not be available in both places.

2. Fill in the input fields as required.
3. Click **Save** to save your changes.

Click **Append to Script Code** if you want to use the selected predefined script as the basis of a more in-depth script that you wish to develop yourself.

In the figure below the URL Redirection predefined script was selected on a Script object, a URL was entered, and the **Append...** button was clicked. This has added the script code to the scripting field, allowing you to edit the code as required.

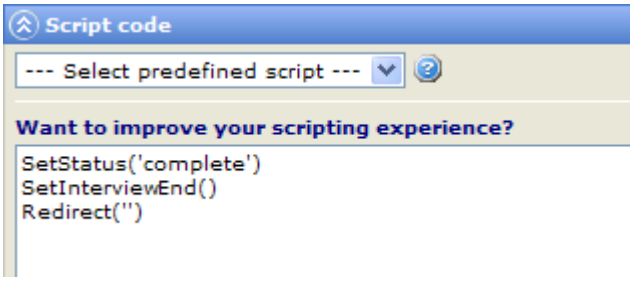


Figure 292 Appending the script ready for further editing

Note: If you wish to use the predefined script "as-is", then you do not need to click the Append... button.

7.4.7.1.1. Random Category Selection Script

This predefined script is available in Script objects. It selects a specified number of options, at random, from the overall list of answer options included in the specified question. This can be used for example if you have a multi question with 10 answer options, and you want to present the respondents with 5 of those options selected randomly from the list, such that they can perhaps choose 3 preferred items from the 5 that are selected .

In the figure, when the respondent arrives at the Cars Tested question, he/she will be presented with 5 answer options that have been selected from the list of options that are available in the question.

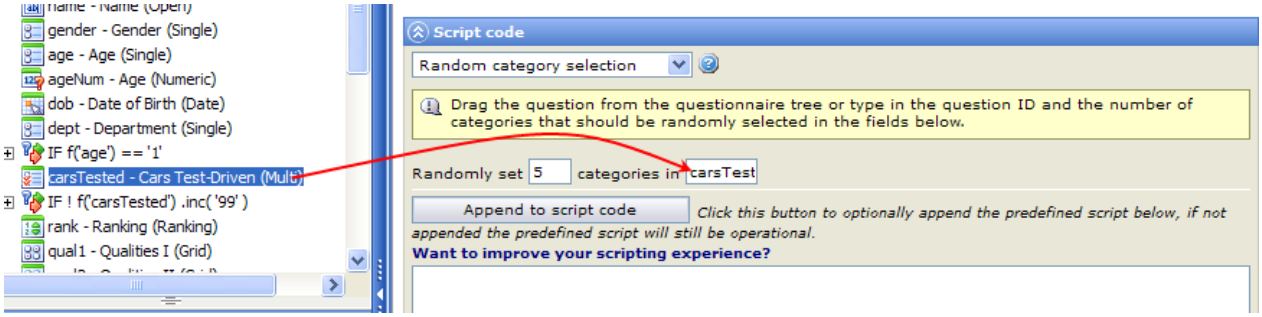


Figure 293 Using the Random Category Selection predefined script

Click **Append to script code** if you want to use the selected predefined script as the basis of a more in-depth script that you wish to develop yourself.

7.4.7.1.2. URL Redirection

This predefined script is available in Script objects and is used to redirect the respondents to a different URL. This is similar to the End Link property (see The URL Setup Tab on page 182 for more information), however this predefined script can be expanded to send different respondents to different URLs.

Type the desired URL into the field using the format specified. Leave the "Close survey..." box checked if you wish to prevent the respondent from returning to the survey after he/she has been redirected.

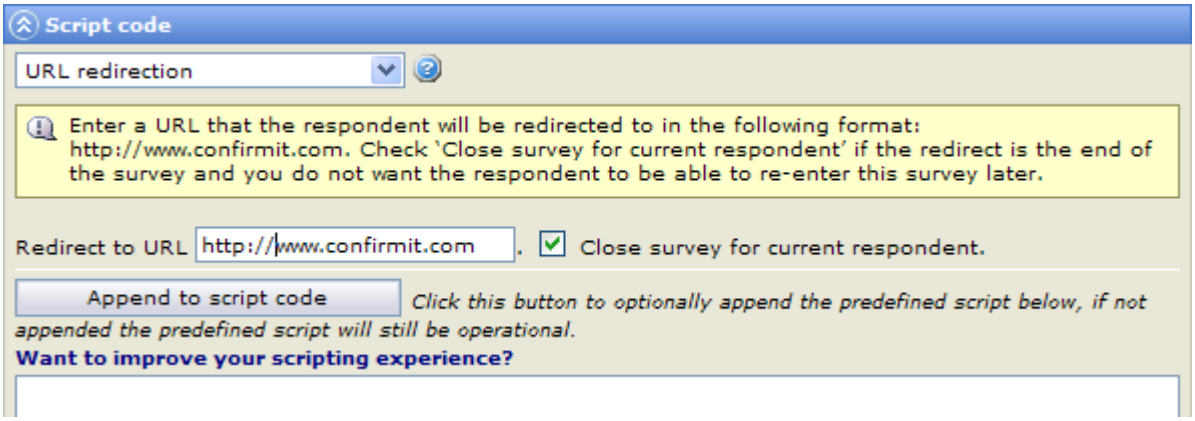


Figure 294 Using the URL Redirection predefined script

Note: This predefined script will also set the current date/time in interview_end and the respondent's status to 'complete'. So the settings in the figure above are equivalent to:
SetStatus('complete')
SetInterviewEnd()
Redirect('http://www.confirmit.com')

Click **Append to script code** if you want to use the selected predefined script as the basis of a more in-depth script that you wish to develop yourself.

7.4.7.1.3. Include and Exclude

The Include and Exclude predefined script is available in the Masking tab for Single, Multi, Ranking, Grid, Numeric List and Open Text List questions.

A mask will be applied to this question, whereby when you type question IDs or drag questions into the two fields, the script either includes or excludes (selected in the drop-down) all categories selected for the specified questions.

1. Drag the questions from the Questionnaire Tree toolbox and drop them into the fields, or type the question IDs into the fields.
2. For each field, click the down-arrow beside the drop-down box and select whether you wish to include or exclude the categories associated with the question.
3. Save the changes.

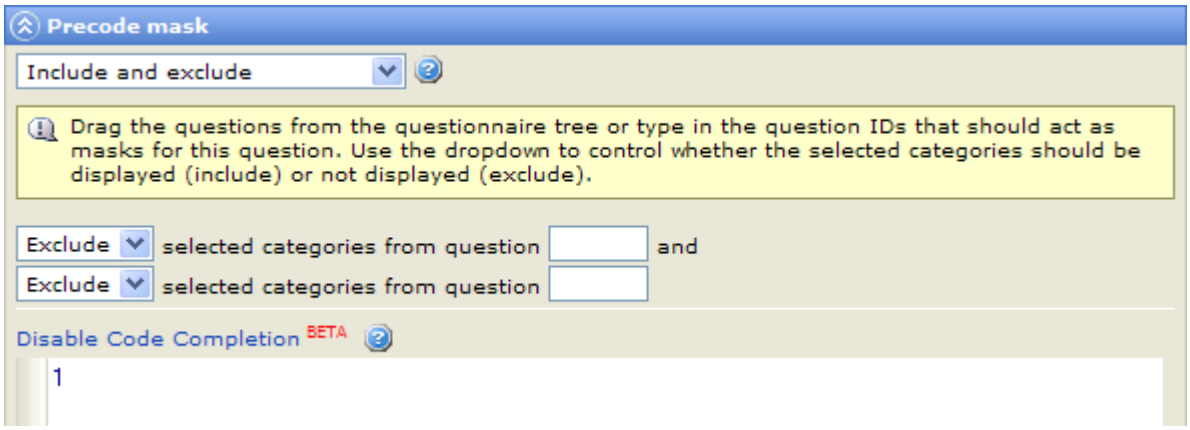


Figure 295 The Code Mask area when the Include and Exclude predefined script is selected

Only one question can be dragged or typed into each field.

7.4.7.1.4. Mask on Question

The Mask on Question predefined script is available in the Masking tab for Single, Multi, Ranking, Grid, Numeric List and Open Text List questions.

A mask will be applied to this question whereby, when you type a question ID or drag another question into the Filter by... field, the script either includes the selected categories in the question that is added, or excludes those categories from the question (as selected in the drop-down box).

1. Drag the question from the Questionnaire Tree toolbox and drop it into the Filter by... field, , or type the question ID into the field.
2. Click the down-arrow beside the Include/Exclude field and select as appropriate.
3. Save the changes.

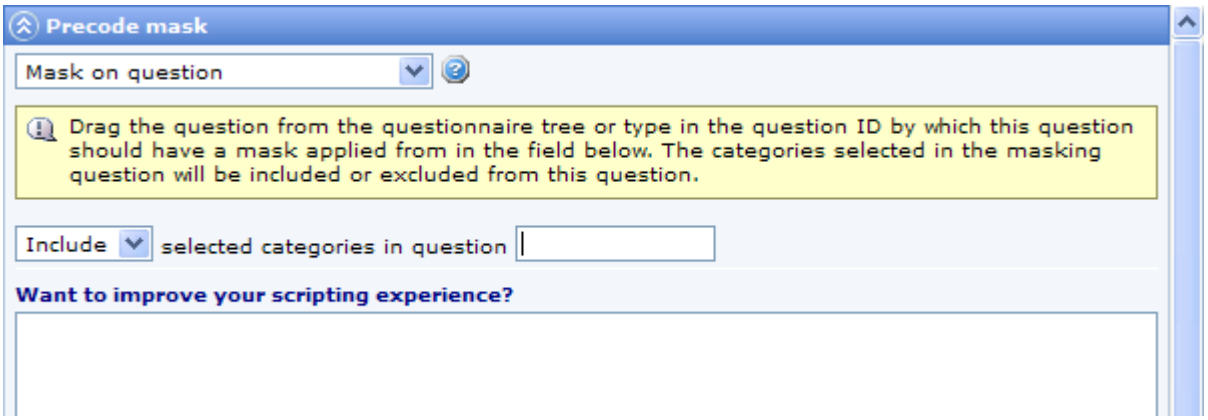


Figure 296 The Code Mask area when the Mask on Question predefined script is selected

Only one question can be dragged or typed into the field.

7.4.7.1.5. Assign Request Values

The Assign Request Values predefined script is available in Script nodes. When you use this script, you need to supply a comma-separated list of question IDs. These IDs will have their values pulled from the URL querystring and assigned to a variable with the same name. The question IDs will not be case-sensitive.

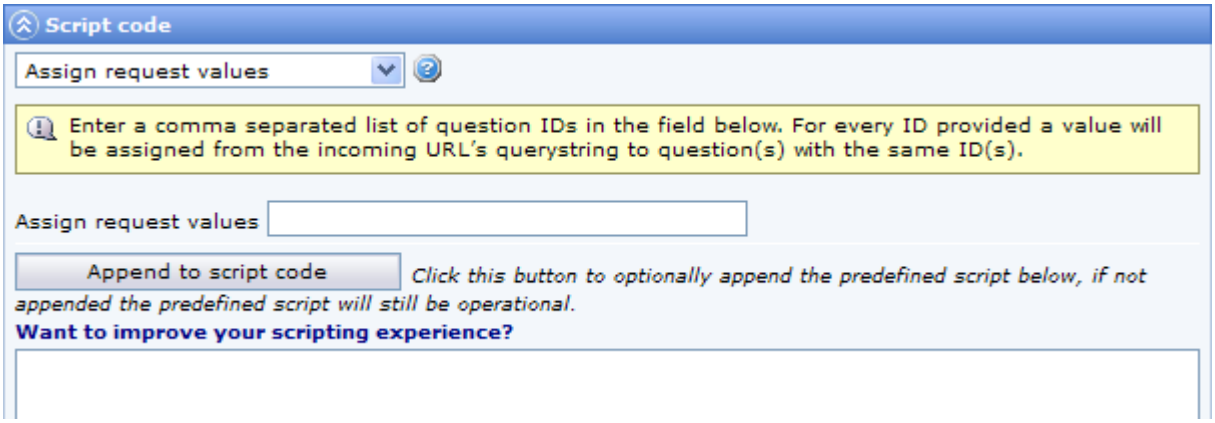


Figure 297 Using the Assign Request Values predefined script

Click **Append to script code** if you want to use the selected predefined script as the basis of a more in-depth script that you wish to develop yourself.

7.4.7.1.6. Include or Exclude With Codes

The Include or Exclude With Codes predefined script is available in the Masking tab for Single, Multi, Ranking, Grid, Numeric List and Open Text List questions.

Drag the questions from the questionnaire tree or type in the question IDs that are to act as masks for this question. Use the dropdown to control whether the selected categories are to be displayed (Include) or not displayed (Exclude) . If required, enter a comma-separated list of codes to force Include and/or Exclude.

The format is: [Include/Exclude] selected categories from [question A] but force category(ies) [x,y,z] to be included and [a,b,c] to be excluded.

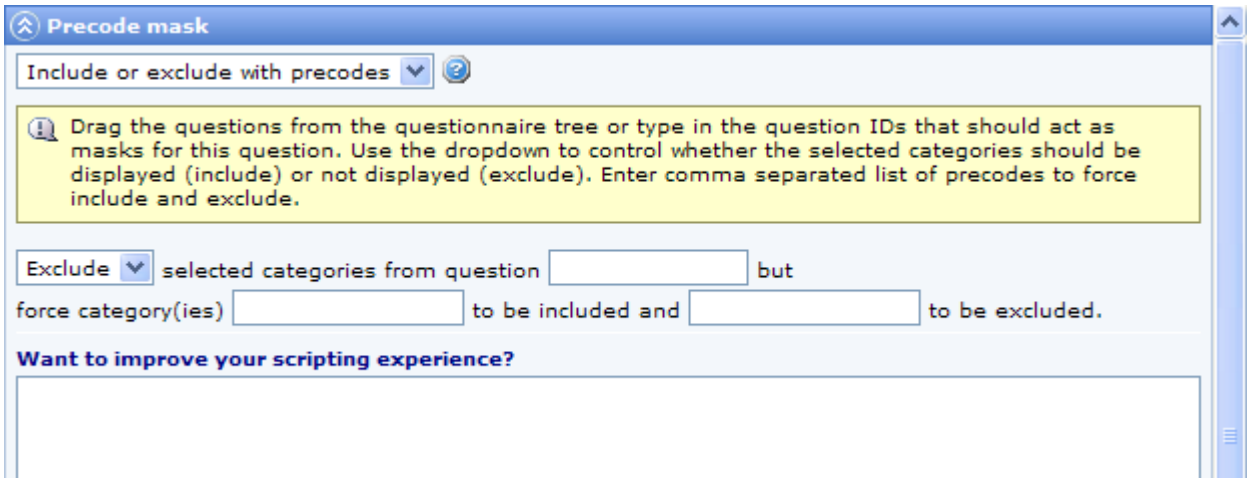


Figure 298 The Code Mask area when the Include or Exclude With Codes predefined script is selected

7.4.8. Loops

A loop is a special type of folder, where the routing inside the loop will be repeated for a number of iterations.

You may want respondents to provide feedback on a number of items (a list of products perhaps), using the same questions for each item. To do this, you put the question inside a Loop. If the respondent has previously selected the items from a longer list, then you can base the loop on the items the respondent has selected. When the respondent reaches this question, Confirmit will ask the same questions for each item that the respondent has selected, and will move on to the next question once it has received answers for each item.

For example, assume you wish to repeat a block of questions for a list of car makes. Instead of defining the same block of questions for each car, only replacing the car name for each block, you can simply create a loop that iterates through the list of cars asking the same question(s) for each.

You can also use nested loops (loops within loops).

Note: If the questionnaire uses the Optimized database format (see The Optimized Database Format on page 38 for more information), then you will be able to use the loops as answer lists in other questions.

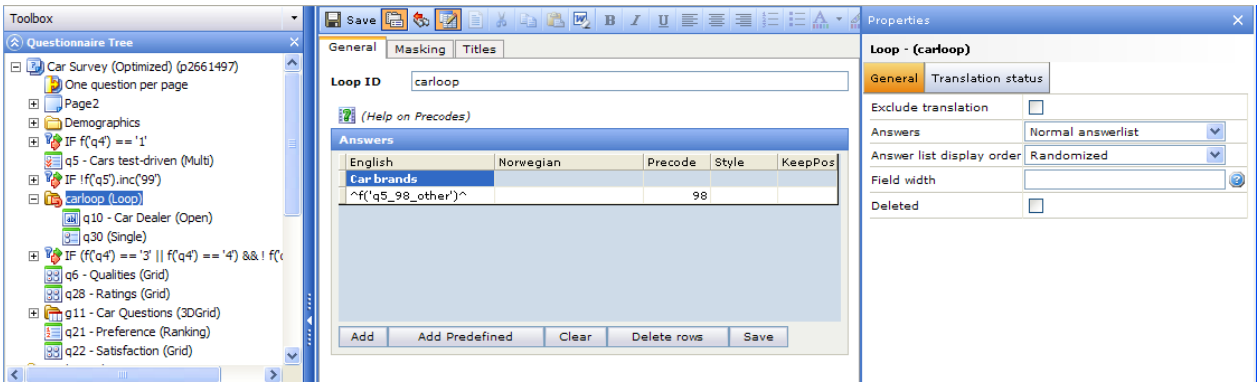


Figure 299 Example of a Loop object

7.4.8.1. Defining a Loop in the Legacy Database Format

To define a loop in the Legacy database format:

1. Create a Loop object in the Questionnaire Tree in the normal manner.

2. Double-click on the Loop object in the Questionnaire Tree to open its Details page.
3. Give the loop a unique ID within the survey (note that the text is not case-sensitive).
4. Create a list of loop-iterations in the same way as you would create an answer list in a form (see Answers on page 237 for more information).

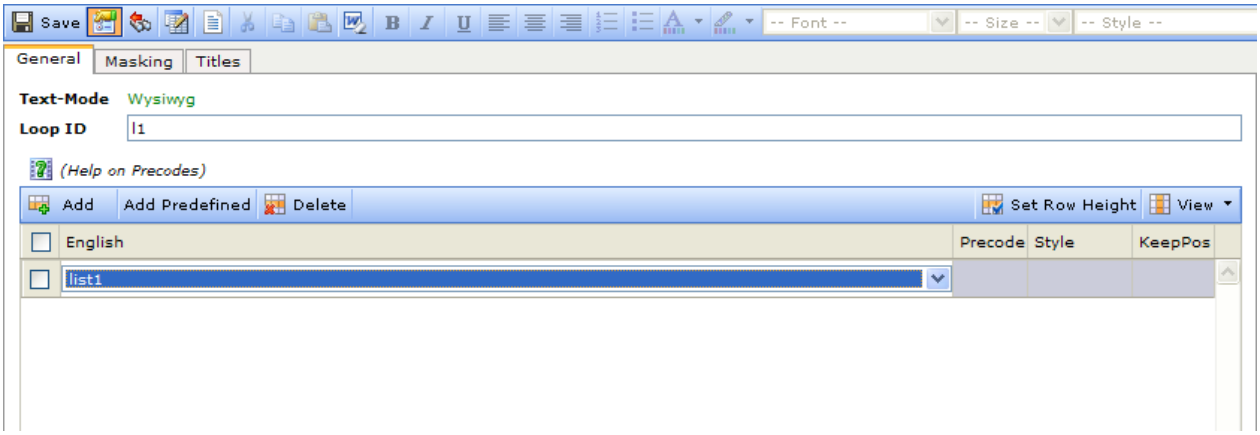


Figure 300 Example of the Loop Details page in DHTML mode

5. If required, apply masking such that the loop only operates under specified conditions (see Masking on page 249 for more information).
6. Open the loop's Properties page and set the properties as required (see The Loop Properties Page on page 292 for more information).
7. Save the changes.

You can now link the loop into another question such that the question is repeated for all the answers specified in the loop.

7.4.8.2. Defining a Loop in the Optimized Database Format

To define a loop in the Optimized database format:

1. Create a Loop object in the Questionnaire Tree in the normal manner.
2. Double-click on the Loop object in the Questionnaire Tree to open its Details page.
3. Give the loop a unique ID within the survey (note that the text is not case-sensitive).
4. Open the loop's Properties page and select the type of answers that you wish to use (see The Loop Properties Page on page 292 for more information).

Note: When the Optimized Database format is selected for the questionnaire, you can select between Normal answer list and Table Lookup (see Using Table or Hierarchy Lookups in the Questionnaire on page 425 for more information).

Note: In the Optimized Database format, loop-reference answers (answers defined in a loop but used by another question) cannot be added to Hitlists, nor will it be possible to filter on these answers in Hitlists.

5. If you select **Normal answer list**, create a list of loop-iterations in the same way as you would create an answer list in a question (see Answers on page 237 for more information), then save the changes.

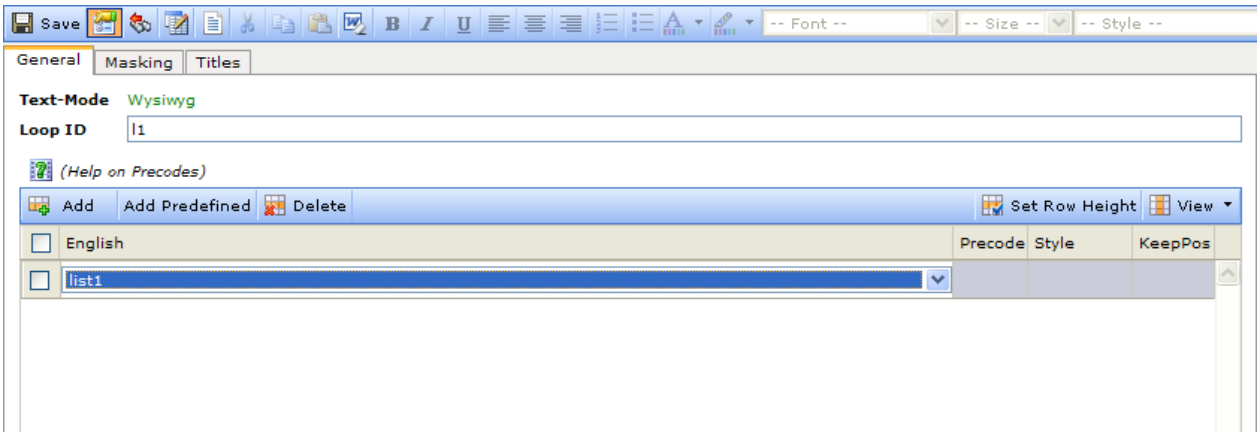


Figure 301 Example of the Loop Details page in DHTML mode with Normal Answer List selected

6. If you select Table Lookup, then the Schema Name page opens.

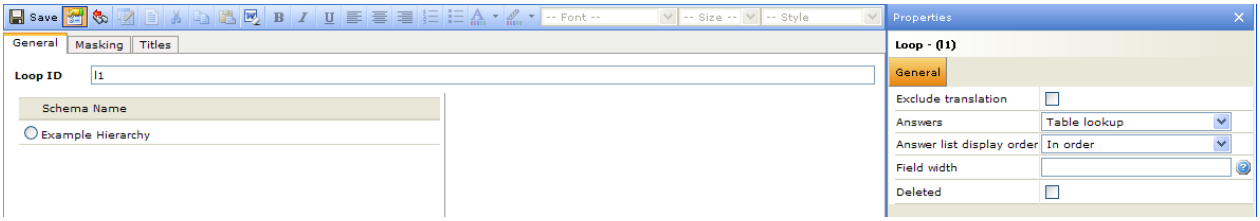


Figure 302 Example of the Loop Details page when Table Lookup is selected.

The Schema Name column lists all the available database schema. When you select the desired schema, a Table Selection field opens in the area to the right of the Schema Name column.

7. Select the table you wish to use.
8. If required, apply masking such that the loop only operates under specified conditions (see Masking on page 249 for more information).
9. Save the changes.

You can now link the loop into another question such that the question is repeated for all the answers specified in the loop.

7.4.8.3. Auto Increment Loops

An Auto increment loop is a loop that will continue asking its questions until specifically told to stop. These loops require a script node with a TerminateLoop() function call to end the loop. This can for example be placed inside a condition following a question on whether there are more items to fill in. Without this script node, the loop will continuously create new loop iterations, and the respondent will never be able to finish the loop.

You specify this loop type in the loops node's Properties panel by selecting Auto increment as the Answer type.

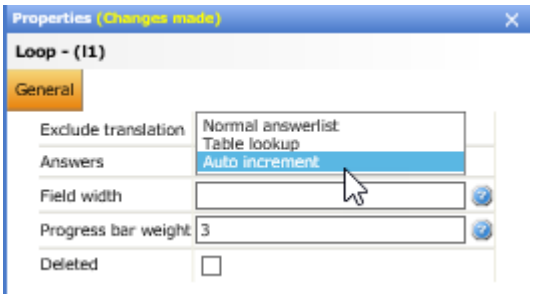


Figure 303 Specifying an Auto increment loop

An auto increment loop iteration requires some interactive content for the respondent, for example a question, info node etc. If the loop contains nothing interactive then the interview will be terminated with an error status and an error notification will be sent via email.

Note: For Auto increment, if the Random Data Generator is used, after 50 iterations the RDG will stop any further increments of this loop even if the TerminateLoop() call has not been initiated. If it is a nested loop, it will be terminated after 50 iterations per loop iteration.

Note: TerminateLoop() can be called multiple times to exit loop levels in a nested loop. Calls to TerminateLoop() in the middle of a loop will have no effect.

Note that it is not possible to flatten data collected in an auto increment loop. This applies when using Templates, the Data Central Flatten operation, and when exporting with the 'single file' option.

7.4.8.4. The Fields and Columns in the Loop Details Page

The various fields and columns in the loop-details page are:

- **Loop ID -** a unique ID of the loop within the survey. The maximum length is 50 characters and it can contain only alphanumeric characters.
- **Add** - adds a row to the answer list for the loop.
- **Add Predefined** - enables you to add a predefined list to the loop answer list.
- **Set Row Height** - opens a pop-up window in which you can define the height of the answer cell in edit mode.
- Click on the **View** button to add and remove columns from the table.
- **Language columns** - the first columns in the list contain the text of the loop-iteration. There is one column for each active language (see Languages on page 250 for more information).
- **Code** - defines the code of the iteration. If a code is not supplied, the code will be equal to the position in the list, starting from 1. Codes can only contain alphanumeric characters, and underscore (_), with no white space. The default maximum length is 32 characters (can be increased to max. 50). Illegal characters will cause the database compilation to abort (see APPENDIX A: LIMITS on page 848 for more information).
- **Style** - select a style in which the various items in the list are to be presented. The styles available are those contained in the **Themes and Skins > HTML Styles** folder in the Questionnaire Tree toolbox (see HTML Styles on page 102 for more information).
- **KeepPos** - set this property to “yes” if you want an item to keep its position when randomizing or rotating the list of iterations.

Masking - if you want to filter the list of iterations, use this field to create a JScript-expression resulting in a set of codes to include or exclude (see Code and Scale Masks / Filtering Answer Lists / Scales on page 456 for more information).

7.4.8.5. The Loop Properties Page

Loops have a Properties page.

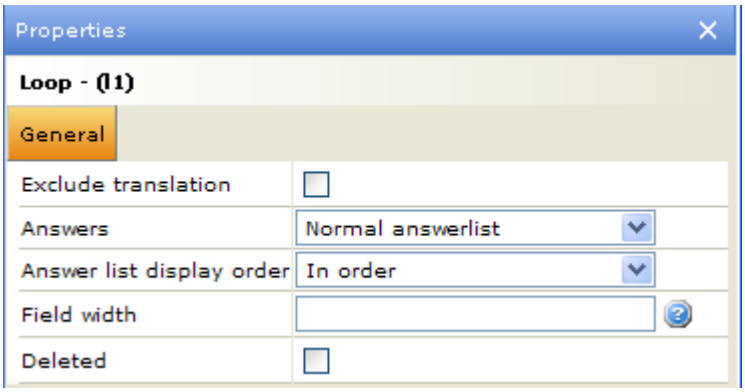


Figure 304 The Properties list for the Optimized Database format

The properties available for loops are as follows:

- **Exclude Translation** – Allows you to exclude certain questions from the translator interface (see Translator on page 433 for more information). This property gives you the possibility to hide nodes that are used for internal programming purposes from the translators in Confirmit Translator.
- **Answers** - [Only for loops in Optimized Database format] select answers for the loop:
    - **Normal Answer List** (default) - a normal list of answers is used.
    - **Table Lookup** - Table Lookup answers are used (see Using Table or Hierarchy Lookups in the Questionnaire on page 425 for more information).
    - **Auto Increment -** an answer list is not used. Instead of predefined answers, it automatically increments the loop identifier until a script function is called to terminate the loop (see Auto Increment Loops on page 291 for more information).
- **Answer list display order** - this property controls the order that the list items appear in:
    - **In order** – in the order that they appear in the list.
    - **Randomized** – in pseudo-random order (see Randomization on page 275 for more information).
    - **Rotated** – the list is shifted and rotated by one position for each new response.
    - **Flipped** - will alternate between displaying the list top-bottom or bottom-top for different respondents.
    - **Alphabetically sorted** - will sort the list alphabetically based on the labels (in the current language).

  Any answer alternatives that have the KeepPos property set to **Yes** will keep their original position in the list.
- **Field width -** the number of characters assigned to the iteration code in the database and when exporting to fixed width ASCII files.
- **Deleted -** when you delete a loop from the routing, it is not permanently deleted, but the “deleted”-flag is set. If you turn on *Show deleted nodes*(see Editing the Routing on page 313 for more information), you can undelete the object by unchecking this flag.

7.4.9. 3D Grid

A 3D Grid is a type of folder. It allows you to combine several questions, which can be of different types, into one object, and presents these questions to the respondent in a grid layout. This enables a more compact presentation than can be achieved when presenting the questions separately. In a 3D Grid, all the questions share the same answer list. In the example below this is the list of possible problem areas in the first column. The questions added to the 3D Grid are then presented as the remaining columns.

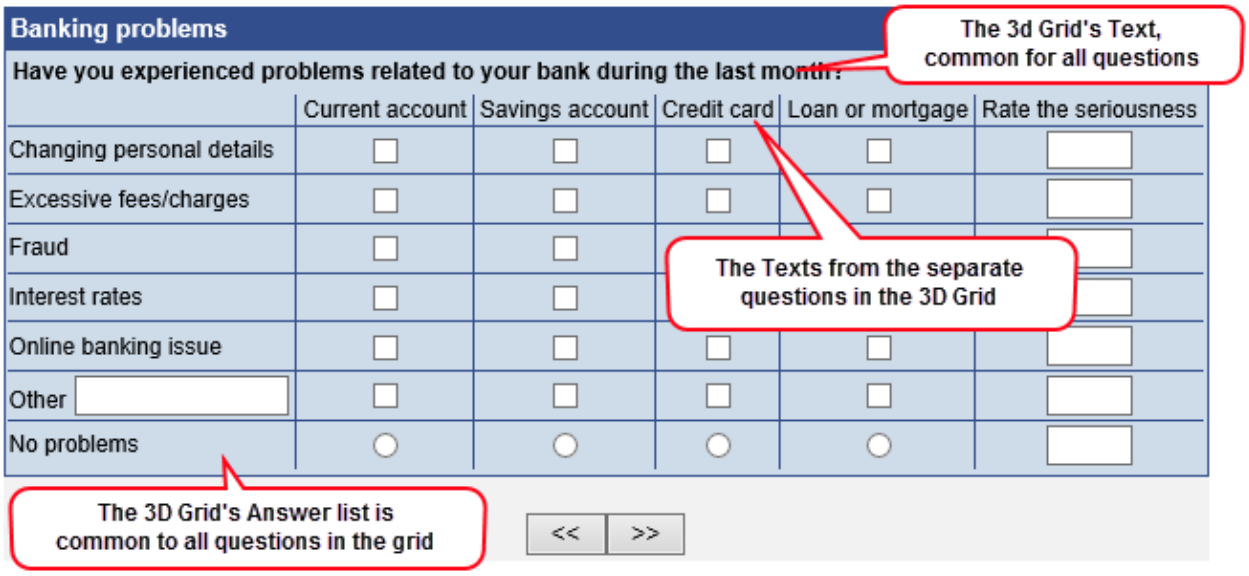


Figure 305 Example of a 3D grid object in a survey

The 3D Grid object can contain the following question types:

- Single.
- Multi.
- Grid.
- Ranking.
- Open text list.
- Numeric list.

Note: The standard 3D Grid object has multi questions as the columns. It is therefore normally not advisable to use the standard 3D Grid in surveys that are intended for mobile responses as the rendition may cause problems for the respondent. The Multi Grid (see The Multi Grid Object on page 222 for more information) can however be used in this situation.

7.4.9.1. How to Add a 3D Grid Object to a Questionnaire

To add a 3D Grid object to your survey, drag the object from the **New Objects** toolbox or right-click in the Questionnaire Tree where you want to place the object and select **3D Grid** from the **Insert** menu. The 3D Grid object is added to the Questionnaire Tree.

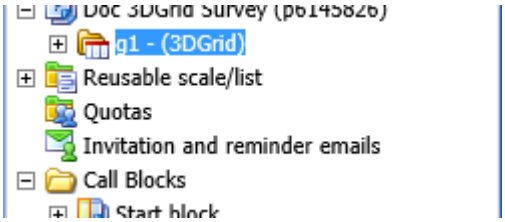


Figure 306 A 3D grid in the questionnaire

You now need to add the questions that are to be included in the grid - go to the next section for details. The 3D Grid properties are described with the other object properties (see Question Properties on page 251 for more information).

Note: Other settings are available. For example you can highlight unanswered cells if the respondent attempts to move on to the next question before completing all the answers in the grid **(see How to Highlight Error Cells on page 296 for more information).**

7.4.9.2. How to Edit a 3D Grid

Once you have added a 3D Grid object to your survey, edit it in the normal manner by double-clicking on it or right-clicking it and choosing **Edit** or **Properties** from the menu.

- In the **Answers** tab, enter the answer list that will be shared by all the questions that will be added to the 3D Grid. In the question as seen by the respondent, these will be the row headers.
- In the **Text** tab, enter the question text that will also be common for all the questions. This will be positioned above the column headers. The menu and properties are the same as for the other types of question (see The Object Types on page 218 for more information).
- You can now add your questions (the columns' headers) to the 3D Grid. Do this in the normal manner; drag the questions from the New Objects toolbox and drop them into the 3D Grid, or right-click on the 3D Grid and choose from the **Insert (Inside)** menu. Note that you can only add Single, Multi, Grid, Ranking, Open Text List and Numeric List questions to a 3D Grid object.

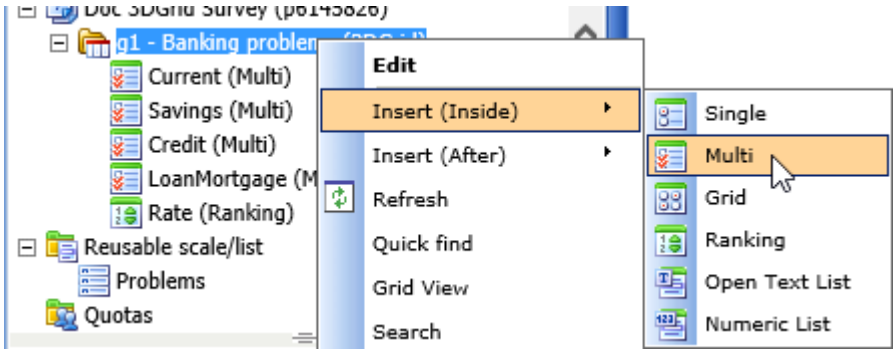


Figure 307 Questions added to the 3D Grid

Edit the questions in the 3D Grid by double-clicking on them or right clicking and choosing **Edit** from the menu.

You will notice that there is no **Answers** tab for questions added to the 3D Grid. The answers for all the included questions are common for the 3D Grid, and provided by the 3D Grid itself (see the Answers tab description above). In the Text field for each of the questions you add to the 3D Grid, enter the text you wish to appear as the header text above that question column, for example *Current account, Savings account, Credit card* etc. (see the figure below).

The figure below shows how a 3D Grid consisting of a series of Multi questions and a Rating question could look in a survey.

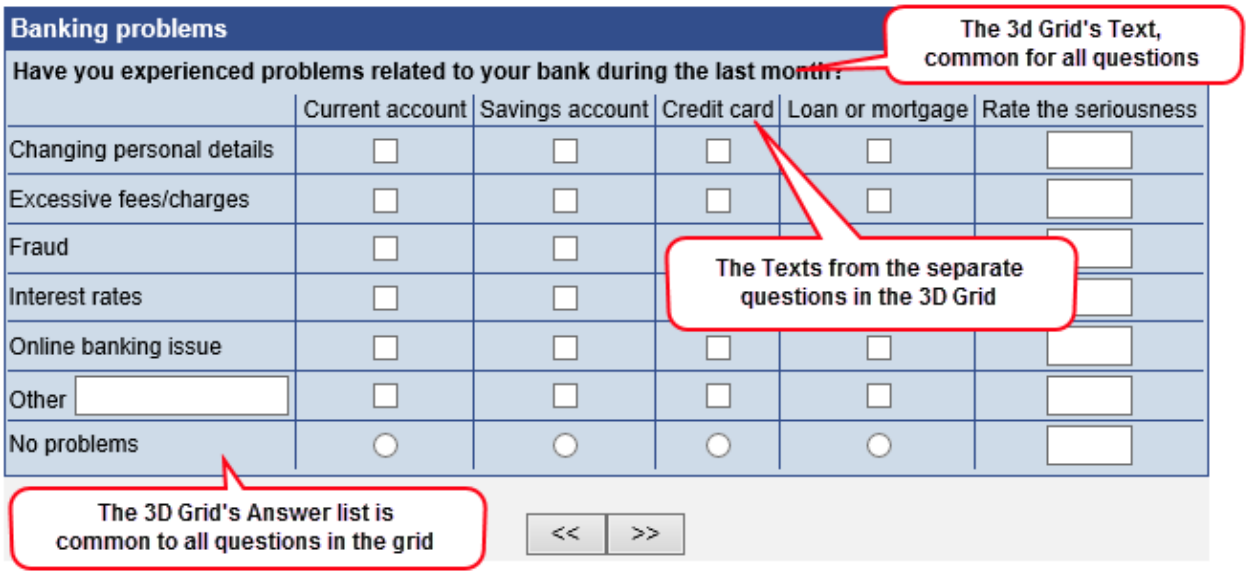


Figure 308 Example of a 3D Grid object in a survey

7.4.9.3. How to Highlight Error Cells

When providing answers to a Grid or 3D Grid question, the respondent can easily miss a cell and attempt to move on to the next question. In this case, a message will be displayed informing the respondent of the error and asking him/her to answer all the questions. However, if the Grid / 3D Grid question has a large number of rows and columns, it may be difficult and time-consuming for the respondent to find the cell(s) that have not yet been given answers. You can therefore set a property such that "error" cells are highlighted in another color, thus making them stand out. Proceed as follows:

1. In the survey, create the Grid / 3D Grid question.
2. In the Questionnaire Tree, right-click on the **HTML Styles** folder and select **Insert Style (Class)**.
3. Give the new style a logical name, for example "griderrorcell", and click **Save**.

   The new style is created and saved in the HTML Styles folder. Note that this new style will be survey-specific - it will only be available in this survey.
4. Double-click on the new style or right-click and select **Properties** to open the style's Properties page.
5. Go to the **Background** tab and set a color for the Color property.

   Here you can type a color code into the Color field, in this example, #FFFF00, or double-click on the color example square (the yellow square to the right of the field) to open the color selector dialog and select a color.

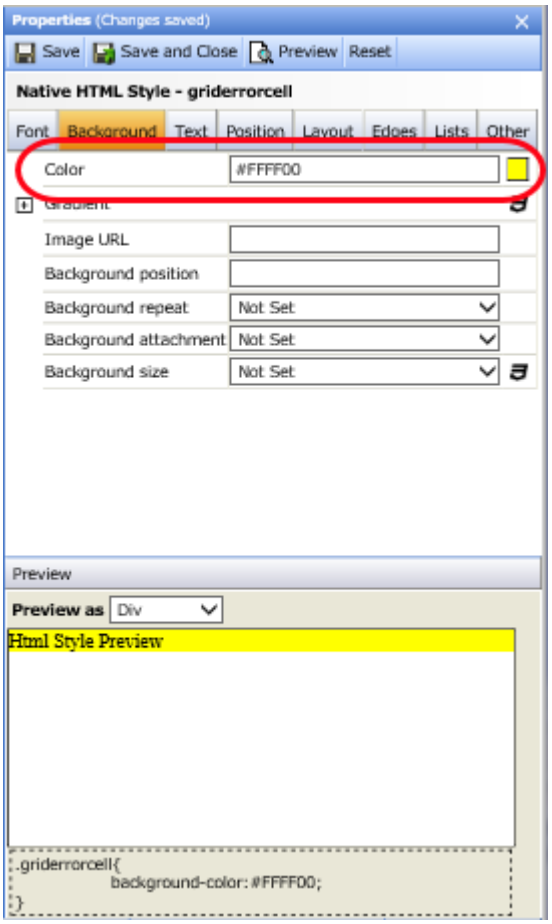


Figure 309 Setting the background color for the style

6. Click **Save and Close**.
7. In the Questionnaire Tree, open the Grid/3D Grid question and go to the **Preview** tab.
8. Click the **Edit the Question Skin** link to open the Question Skin Editor page (see Shortcut to Style Editing on page 103 for more information).
9. Double-click the **Question Form Inputs** element or right-click on it and select **Properties** to open the element's Properties page.
10. Go to the **Grid** tab, and for the Grid Table Error Cell Style field, click the down-arrow to open the drop-down list and select the style you have created above.

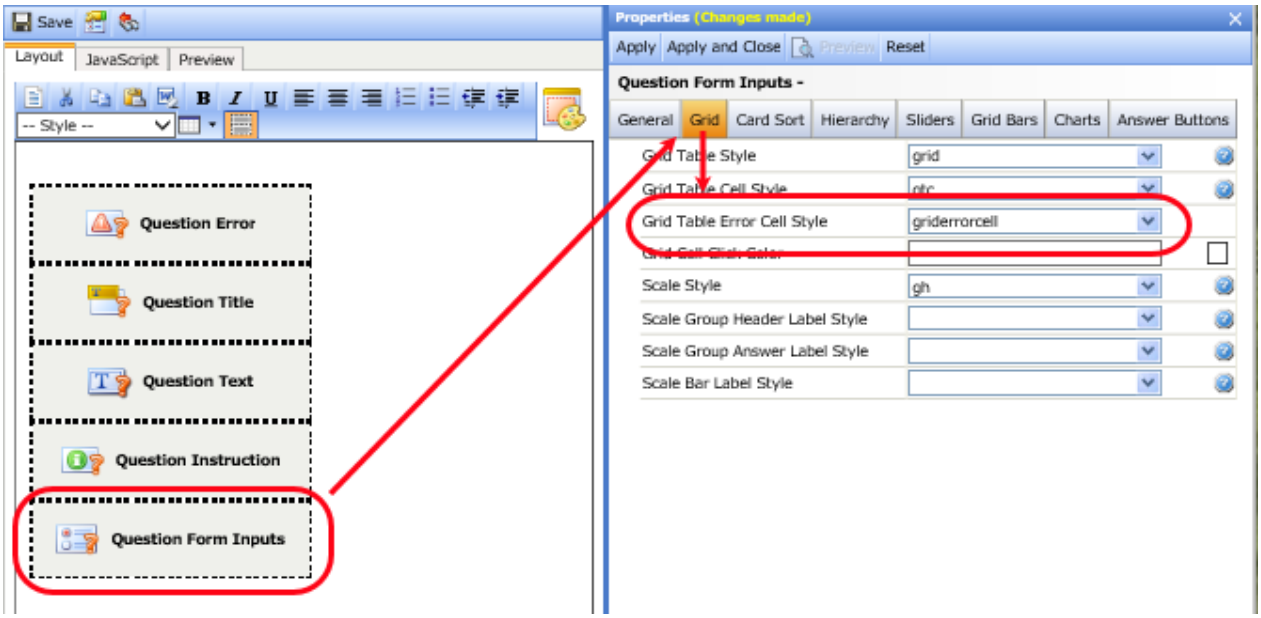


Figure 310 Specifying the Grid Table Error Cell Style

11. Click **Apply and Close** for the Properties page, then save the changes for the question skin.
12. Now go to **Survey Settings**, and in the Layout tab check the **Highlight cells in grid that fail "Answer required" checks** box (located towards the bottom of the page).
13. Save the settings.

Now, if a respondent misses an answer in the grid, when he/she attempts to go on to the next question, the error message will be displayed and the relevant cells in the grid will be highlighted with the selected "error" background color.

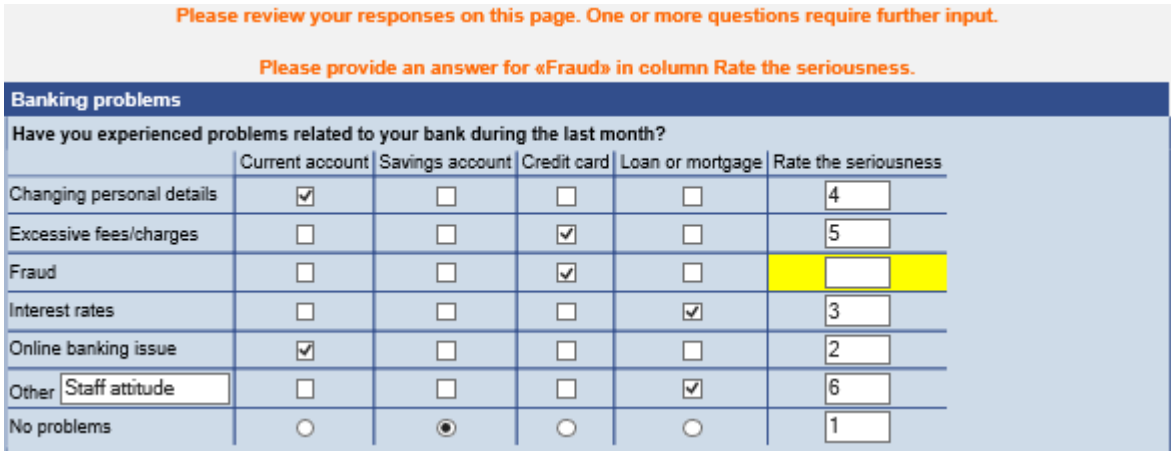


Figure 311 Example of a highlighted error as presented to the respondent

7.4.10. Call Blocks

Call Blocks are elements that enable you to group questions and other objects together such that the grouped objects can be processed specially or separately within the questionnaire tree. Several types of Block element are available in Confirmit:

- **Blocks** - Confirmit has two types of Blocks; those that are located within the questionnaire routing and which are used to group questions for processing, and those that are placed outside the questionnaire routing which contain sets of questions that are called by Call blocks.

  o The Block element within the routing enables you to group questions together and apply for example randomization and/or rotation to the questions within the block. This is standard survey functionality that is used frequently in market research to avoid bias in responses, which can arise as a result of the order in which the questions are presented. In addition to normal questions. Blocks can contain complex structures such as conditions and loops, and it is also possible to nest Blocks, as shown in the example below. Here the Entertainment block contains three other blocks, each with questions in them. The blocks will have single page breaks.

  o The Call Blocks folder in the Questionnaire Tree allows you to set up groups of questions outside of the questionnaire routing. These blocks are similar to the blocks described above and are intended to contain individual questions or sets of questions, but they are not part of the standard questionnaire routing. This means that these blocks and their contents will not be executed automatically when a respondent answers the survey, but must be activated by a Call Block object placed in the questionnaire tree. When the respondent works their way through the questionnaire and they come to a Call Block object, the Call Block will divert the survey flow to the specified Block. Once the contents of the Block have been processed, the questionnaire routing will return automatically to the point in the routing immediately after the Call Block, and the questionnaire will continue.

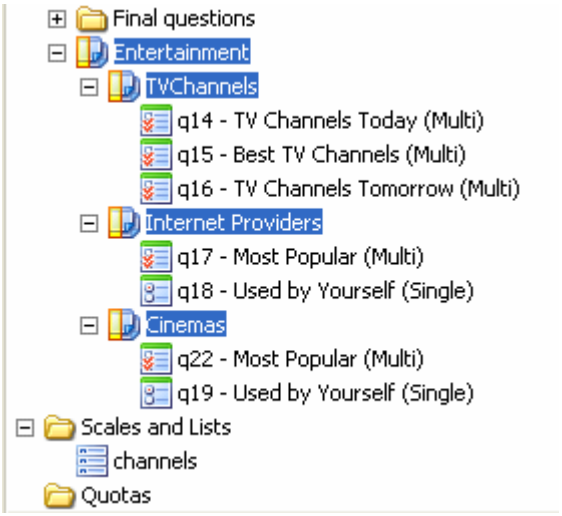


Figure 312 Blocks within blocks

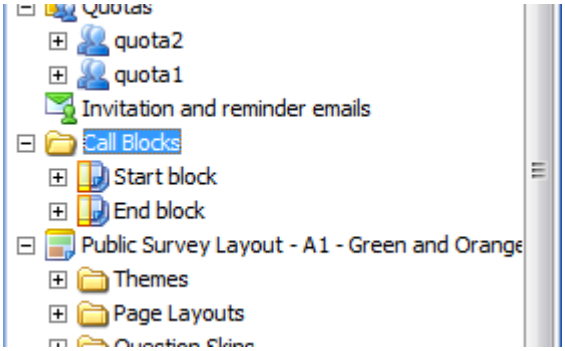


Figure 313 The Call Blocks folder in the questionnaire tree

Any number of "external" Blocks can be added to the routing (see How to Create an External Block on page 301 for more information), these can be called at any time during the survey, and the same Block can be executed any number of times by different Call Blocks in the questionnaire tree. For the questions inside the block, any answers entered during previous executions of the block will remain. The Call Block objects can themselves be activated by for example scripting within other questions in the tree. The Call Blocks folder in the routing contains two "special case" blocks by default: Start Block and End Block - see below for descriptions.

Note: The use of scripted Redirect() to jump into or out of questions that are in Call Blocks will cause problems and should not be attempted. A key attribute of Call Blocks is that they can be entered from multiple points in a survey (see above), so the survey engine will not have a specific "entry-point" that has been used to enter that Call Block. Therefore when the Call Block finishes it does not know where in the main body of the survey to return to, and the survey will simply error.

- **Start Blocks** - a Start Block is a special type of Block that will ALWAYS be activated at the beginning of a survey/interview. Any questions or other objects located within the Start Block will always be the first things that are processed when the respondent starts the questionnaire. The Start Block will be presented to the respondent whenever he/she enters the questionnaire for first time, and whenever the respondent returns to the questionnaire after a postponement unless the Web Option "Allow respondents to change their original answers" is disabled (see The Web Options Tab Properties on page 504 for more information). On returning to the questionnaire, the Start Block will present the answers that the respondent has entered previously. The respondent can then change those answers as required. A Start Block cannot be deleted from the Questionnaire tree. If no questions are added to the Start Block, then it will be ignored.
- **End Blocks** - an End Block is a special case Block that will ALWAYS be activated at the end of a survey/interview. Any questions or other objects located within the End Block will always be the last things that are processed when the respondent completes the questionnaire. The questions contained within the End Block will be presented to the respondent whenever he/she leaves the interview, either due to postponement or because the questionnaire is completed. If the respondent returns to the interview later, and again leaves it for any reason (perhaps this time the questionnaire is completed), then the questions in the End Block will present the answers that the respondent has entered previously. The respondent can then change those answers as required. An End Block object cannot be deleted from the Questionnaire tree. If no questions are added to the End Block then it will be ignored.
- **Call Blocks** - Call Blocks are used to call or activate a Procedure Block. You can place a Call Block anywhere within the questionnaire routing. When the respondent works their way through the questionnaire and reaches the Call Block, the Call Block diverts the routing to the specified Procedure Block and the questions within that Procedure Block are presented to the respondent. Once the respondent has answered the questions in the selected Procedure Block, he/she is returned to the questionnaire, to the point at which they left it to process the Procedure Block. The respondent can then continue with the questionnaire. You can add as many Call Blocks as you wish to a questionnaire. These Call Blocks can then refer to any Procedure Blocks, and can specify the same Procedure Block more than once.

Important
Background variables (see Use of Background Variables on page 541 for more information) only have "values" once the respondent has passed them in the survey (and provided the necessary answers). Until this point, the variables are regarded as being empty if they are used in text substitution or scripting. Special care must therefore be taken when creating surveys that include a Start Block if background variables are needed in the Start Block. The background variables MUST then be placed at the beginning of the Start Block such that they are passed first when the interview opens.

Note: The Block, Start Block, End Block and Call Block functionality is only available when the survey uses the Optimized Database format (see The Optimized Database Format on page 38 for more information).

7.4.10.1. How to Create a Standard Block

Use this type of block to group questions together and apply for example randomization and/or rotation to the questions within the block. These blocks are inserted directly into the questionnaire tree:

1. Right-click in the appropriate place in the questionnaire tree and select **Insert (After) > Block** from the menu, or drag a **Block** object from the New Objects toolbox and drop it into the questionnaire tree.
2. Insert into the Block object the questions you wish to rotate or randomize.

3. Double-click on the Block element or right-click on it and choose **Edit** from the menu to open the Block's Properties page.

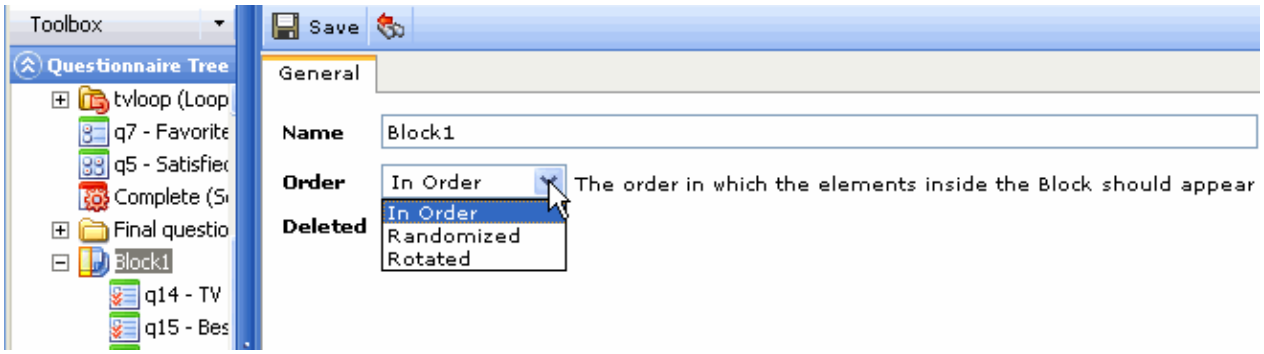


Figure 314 Setting up a Block object

Here you can rename the block object and choose the order in which the elements within the block are to appear: In Order, Randomized, or Rotated. Note that in this case, pseudo-randomization is used.

7.4.10.2. How to Create an External Block

You can create Blocks outside the questionnaire routing in the **Call Blocks** folder in the Questionnaire Tree. You can then call these blocks by adding a Call Block to the appropriate place in the questionnaire (see How to Create a Call Block on page 302 for more information). You can create any number of Blocks.

1. Right-click on the **Blocks** folder and select **Insert Block** from the menu.

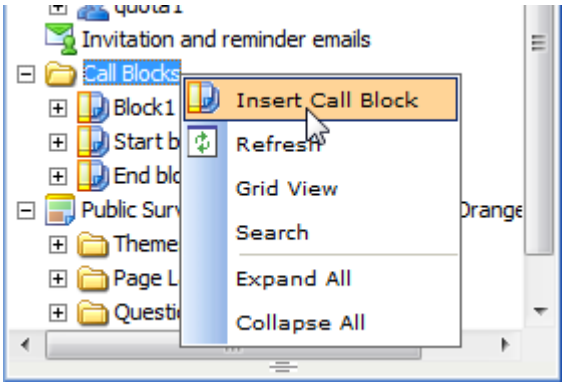


Figure 315 Inserting a new Block into the Call Blocks folder

2. Add objects (questions, loops etc.) to the Block as required, using the same methods as when adding objects to the questionnaire (see How to Add New Objects to the Questionnaire Tree on page 217 for more information).

   Any objects added to the Block will be run when the Block is activated by a Call Block in the questionnaire.

3. Double-click on the Block to open its properties page.

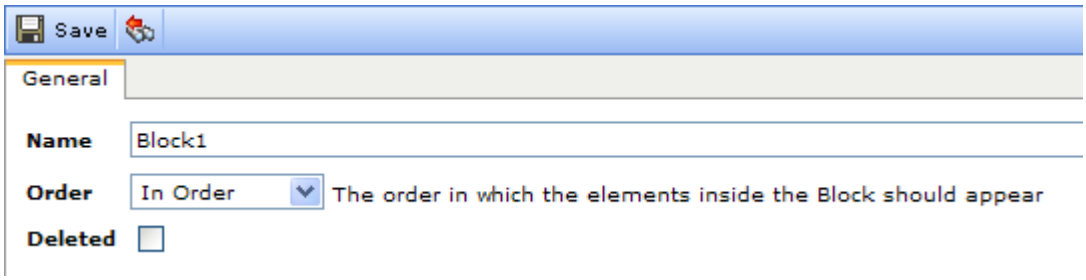


Figure 316 The Block Properties page

4. Edit the settings as required then click **Save** to save the changes.

The properties are as follows:

- **Name** - the name of the block. By default the blocks will be named BlockX where X is the order number in which it was created. You can rename the block as desired.
- **Order** - the order in which the elements within the block are to be presented to the respondent. Click in the field and select the desired order from the list. Note that this property only applies to the objects inside the selected block. Note also that in this functionality, pseudo-randomization is used.
- **Deleted** - if the block has been deleted from the tree and you wish to reinstate it, undelete it by un-checking the box (see Deleting Objects on page 315 for more information).

7.4.10.3. How to Create a Call Block

Block to Call nodes are used to call or activate Blocks that have been created in the Call Blocks folder external to the questionnaire tree (see How to Create an External Block on page 301 for more information). You can create Block to Call nodes anywhere in the Questionnaire tree.

1. Right-click in the appropriate place in the questionnaire tree and select **Insert (After) > Block To Call** from the menu.

   A Block to Call object is added to the tree.

2. Double-click on the Block to Call object in the tree to open its properties page.

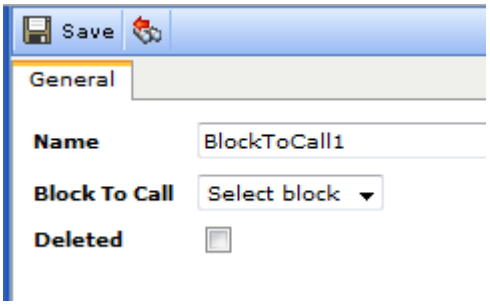


Figure 317 The Block to Call Properties page

3. Edit the name if required and select the Block that is to be called, then save the changes.

The properties are as follows:

- **Name** - the name of the Block to Call object. By default the blocks will be named BlockToCallX where X is the order number in which it was created. You can rename the block as desired.
- **Block to Call** - the Procedure Block that is to be activated by this node. Click in the field and select the desired Procedure Block from the list. All Procedure Blocks in the Call Blocks folder are listed.

- **Deleted** - if the Block to Call node has been deleted from the tree and you wish to reinstate it, undelete it by un-checking the box (see Deleting Objects on page 315 for more information).

7.4.11. The Page Object

The Page object enables randomization and rotation of simple elements (questions) within a page, and enables you to specify themes and/or page layouts for specific pages. Objects that will cause a page break, for example conditions, loops and blocks, are not allowed within a Page. You can also use dynamic answers within pages, enabling parts of the page to be updated based on responses to one or more questions on the same page (see Dynamic Questions on page 464 for more information).

Pages can be used inside Blocks. Pages can also be used in combination with Question masking (see Confirmit Scripts on page 448 for more information) if there are some questions that are to be displayed only under certain conditions.

To insert a page in your questionnaire:

1. Drag a Page object from the New Objects toolbox and drop it into the questionnaire tree.
2. Insert into the Page folder the questions you want to rotate or to randomize.

   To edit the page item, double-click it or right-click it and choose **Edit** from the menu. The editor page opens.

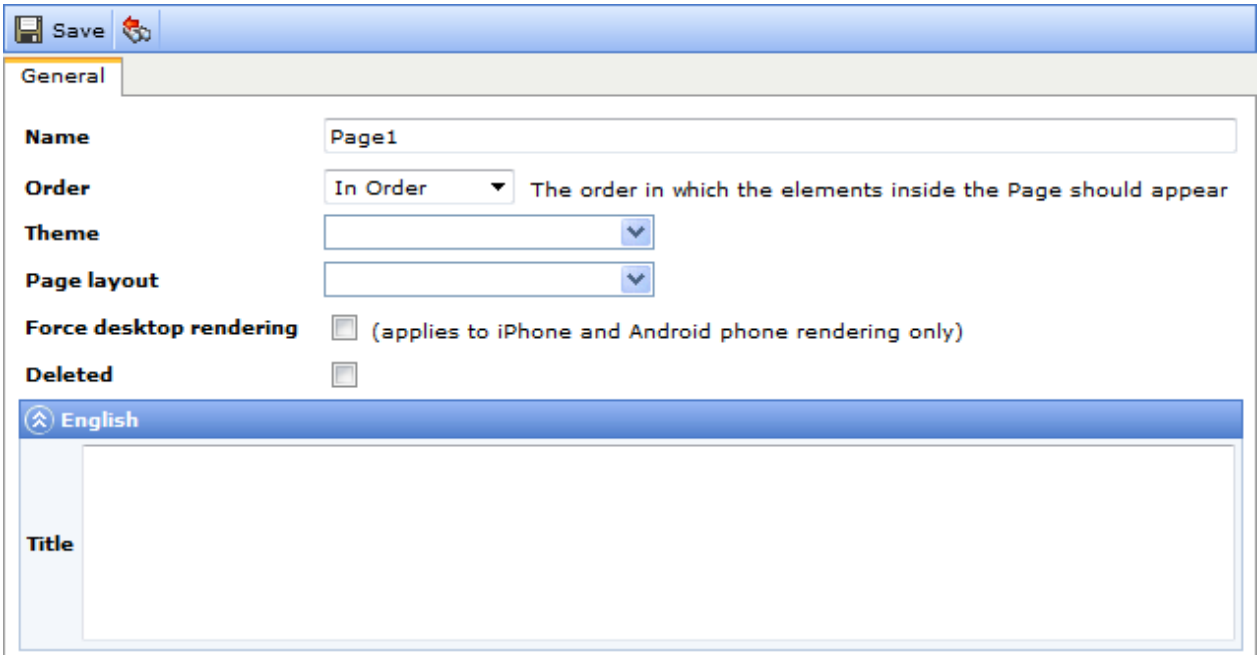


Figure 318 Setting up a Page object

- **Name** - the name of the page object. This name appears in the questionnaire tree. You can rename the page object as required.
- **Order** - the order in which the elements in the page are to appear. The options are: In Order, Randomized, or Rotated.
- **Theme** - select the theme to be used for this page. If no theme is selected, the default theme for the questionnaire is used.
- **Page layout** - select the page layout to be used for this page. If no layout is specified, the default layout for the questionnaire is used.

- **Force desktop rendering** - if the survey is set to allow Touch rendering on iPhone or Android phone, check the box to override Touch rendering for the contents of just this page. This applies to Touch (iPhone or Android phone) only; generic rendering is still generic rendering.

Note: You may have created some very customized pages/questions, for example through client-side scripting or Flex Question Extensions, which would not be included in Touch (iPhone/Android) rendering. In this case, rather than turning off the Touch functionality for the entire survey to allow such customized pages/questions to use normal rendering (with customizations) on Touch mobiles, you can turn off Touch for the specific page. On the following page, the survey will revert back to Touch rendering again if an iPhone or Android phone is in use.

- **Deleted** - when you delete an object from the questionnaire tree it is not permanently deleted but the "deleted" flag is set. If you turn on *Show deleted nodes* (see Editing the Routing on page 313 for more information), you can undelete the object by unchecking this flag.

7.4.12. The Telephony Object

If a survey has the CATI Survey option enabled, an additional object becomes available that can be added to the questionnaire - **Telephony**. This object is used to control the transmission of the dialing commands to the CATI console for dialing in CATI-enabled surveys. Double-click on the object in the Questionnaire Tree to open its Details page.

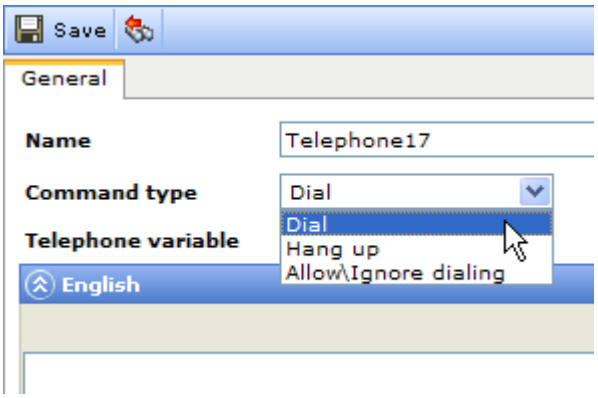


Figure 319 The Telephony object's Details page

When used in Authoring, this object can have one of three command settings:

- **Dial** - causes the system to issue a telephone number dial command. The Telephone Variable drop-down is available.
- **Hang up** - causes the system to hang up the existing respondent telephone number.
- **Allow/Ignore dialing** - specifies whether or not the dial/hang up commands should be active (used when going back through the survey)

All values can have a label allocated to them. This label is then shown in the questionnaire tree.

When Dial is selected, additional (optional) text (which can include data substitution) can be supplied. This text will be displayed on the CATI interviewer console when dialing is in progress (when dialing in Preview mode (see The CATI Options Tab on page 516 for more information)). The open text variable corresponding to the respondents telephone number is also supplied.

When this command type is selected, Allow/Ignore can be enabled via a checkbox. If it is disabled (the box is NOT selected), then when the interviewer passes the next Dial/Hang up telephony command in the questionnaire, the console will not perform the command. This option will be useful if the interviewer needs to move backwards through the questionnaire - there is no point in trying to dial the number if it is already connected.

7.4.13. Sending Email from Within the Survey

You can send email from within a survey by using an Email node. The email will be sent to the specified address(es) when the respondent passes this point in the questionnaire. Note that the respondent will not automatically be informed that the email is being sent; you will need to copy him/her if you wish them to know. As with all the other New Objects, to create an Email node:

1. Click on the **Email** object in the New Object toolbox to select it, and drag and drop the object at the desired place in the questionnaire tree, or

   Right-click in the Questionnaire Tree at the place where you wish to insert the email object, choose **Insert Inside** or **Insert After** as appropriate, then select the **email** object from the drop-down list.

   An Email object is created in the questionnaire tree, and the Email Details page opens.

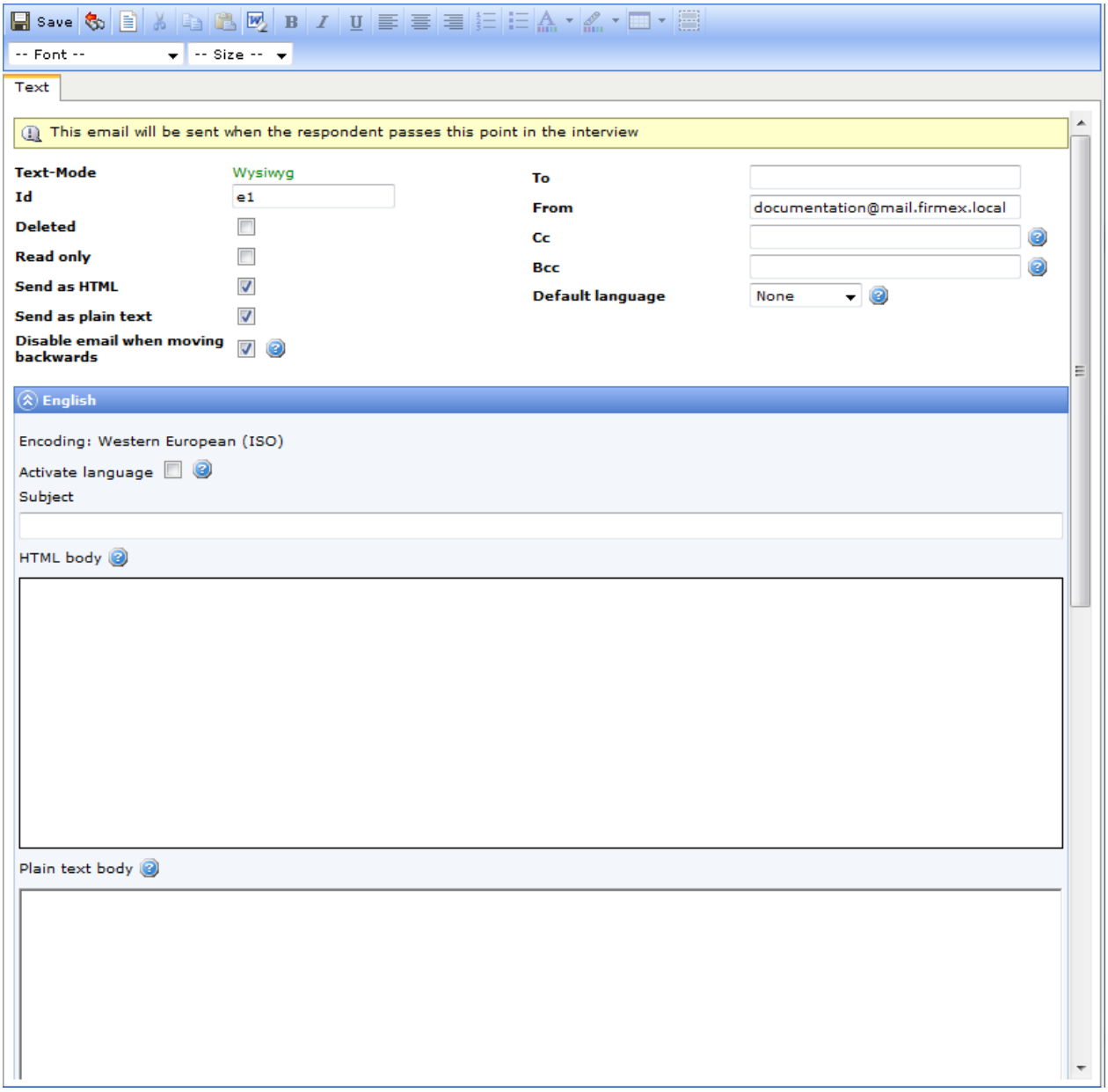


Figure 320 The Email Details page for setting up an email to be send from within a questionnaire

2. Select the properties and options, and add the addresses as required (see The Email Properties and Settings on page 306 for more information).

Important
When adding a From address, if you add the wrong domain, a custom domain you do not control yourself, or a domain which has not been configured to allow Confirmit servers to send on its behalf by using SPF records, then you risk severely degraded deliverability, and negatively affecting the service as a whole. Also, if an email sent by Horizons is automatically forwarded from one recipient's inbox to another the email may not arrive at the second inbox, as the original DKIM signing and SPF records will not match the originating server.

3. Save the changes.

7.4.13.1. The Email Properties and Settings

The various properties and fields in the Email Details page are as follows:

Note: Some of the properties on this page differ from those available on the Details page that is displayed when you are designing Invitation and Reminder email.

- **Text Mode** - the currently selected text editing mode. Click the **Switch between ...** button in the details page toolbar to change between WYSIWYG and HTML. The text editing tools in the toolbar above the Email Details page are active when you are in the WYSIWYG mode
- **Id** – displays the name/title of the current email object. The default values are "e1", "e2", etc. You can enter more descriptive titles if you wish.
- **Deleted** – will be selected if the email object is soft-deleted. If you uncheck the Deleted option, the email object will be undeleted.
- **Read only** – choose this setting if you want the email object to be locked so that no changes are made to it accidentally, either in questionnaire editing mode or when sending the email.
- **Send as HTML** – check to send the email as HTML code. Only mail clients that support HTML will be able to read the email.
- **Send as plain text** – check to send the email as plain text. Most mail clients will be able to read it.

  The email object will have two text fields for each language selected for the survey; one for HTML body and one for Plain text body. You can choose to send the email in either one or both of those formats. When you choose to distribute the **email in both formats**, the mail clients supporting HTML will use the HTML version, other mail clients will display the text version.
- **Disable email when moving backwards** - check this box if you not want the email to be sent when the respondent is moving backwards through the questionnaire. If this box is not checked, then the email will be sent every time the respondent crosses the node.
- **To** - type into this field the email address to which the email is to be sent.
- **From** - the email address of the person sending the email (your email address).

Important
When adding a From address, if you add the wrong domain, a custom domain you do not control yourself, or a domain which has not been configured to allow Confirmit servers to send on its behalf by using SPF records, then you risk severely degraded deliverability, and negatively affecting the service as a whole. Also, if an email sent by Horizons is automatically forwarded from one recipient's inbox to another the email may not arrive at the second inbox, as the original DKIM signing and SPF records will not match the originating server.

- **Cc** - is an abbreviation for carbon copy. If you add a recipient's name to this field, a copy of the message is sent to that recipient and the recipient's name is visible to other recipients of the message.
- **Bcc** - is an abbreviation for blind carbon copy. If you add a recipient's name to this field, a copy of the message is sent to that recipient and the recipient's name is not visible to other recipients of the message.

- **Default language** - if respondents do not have any language specified in the respondent list, if their language is not activated, or if it does not exist in the current email, they will receive the email in the default language. If you set Default language to 'None', respondents who do not match any of the activated languages will not receive the email.
- **Language fields** - one pair of HTML and Plain Text Body fields is displayed for each language
- **Activate language** - use this field to specify which languages the email is to be sent in. If no default language is set, respondents who do not match any of the selected languages will not receive the email.
- **Subject** - the subject of the email. The text you type into this field will appear in the email's Subject field.
- **Html body** - Confirmit can send Multipart emails, meaning that you can send both Plain Text and Html in one message. This then allows the recipient's mail client to decide which version is to be displayed. Use this field to compose the text of Html emails. If you want to send only HTML emails (not Plain Text), use only this field and deselect the Send as plain text checkbox. If you want to send Multipart emails, use both the Plain Text and Html fields.
- **Plain text body** - use this field to compose the text of Plain Text emails. If you want to send just Plain Text emails (not Html), use only this field and deselect the Send as HTML checkbox. If you want to send Multipart emails, use both the Plain Text and Html fields.

Note: You can use the same types of response piping in the address and subject fields and in the HTML and Plain Text bodies as in other types of question.

7.4.14. Invitation and Reminder Email

The Invitation and Reminder Email folder allows you to store directly in the questionnaire the email texts and setups that will be used when distributing the survey to the respondents. All the emails you set up in the questionnaire will be available in **Respondents > Emailing** (see Sending Email on page 565 for more information).

Note: Users logged on to Confirmit with the Standard User permission have a different email setup interface (see Sending Email as a Standard User on page 582 for more information).

If you duplicate the questionnaire, the Invitation and Reminder Email folder will be included in the copy of the survey. It will also be included in the XML survey exports and imports, it can be included in libraries and templates, and it can be translated via Confirmit Translator (see Translator on page 433 for more information). This means that email texts and setups can be stored and reused in all survey languages.

Note: You can also send email from within a survey using an Email node

To add a new email object to your questionnaire:

1. Either drag the “Email” object from the New Objects toolbox and drop it into the **Invitation and reminder emails** folder in the Questionnaire Tree, or right-click on the **Invitation and reminder emails** folder and choose **Insert email** from the menu.

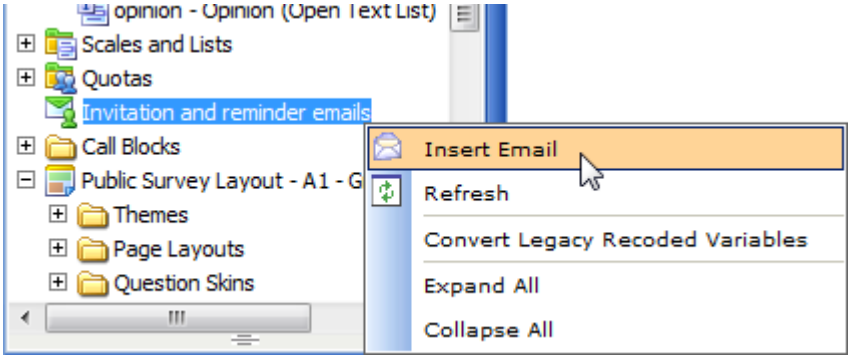


Figure 321 Inserting an Email object

A new email object is added to the folder and its Email Details page opens. To edit an existing email object, either double-click on it or right-click on it and choose **Edit** from the menu.

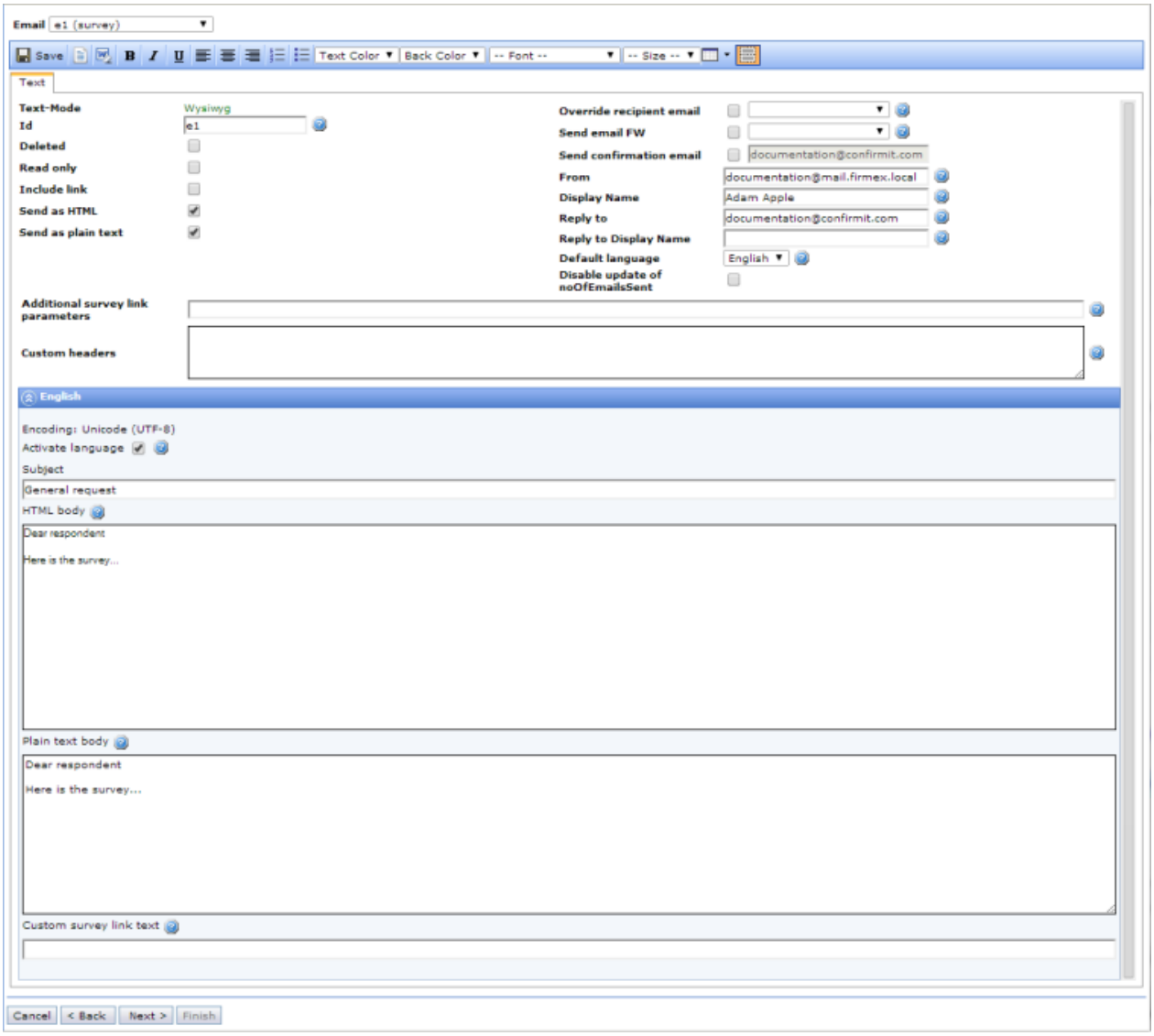


Figure 322 Editing an Email object

2. Select the properties and options, and add the addresses as required (see The Email Details Page Properties and Fields on page 571 for more information).
3. Save the changes.

Important
When adding a From address, if you add the wrong domain, a custom domain you do not control yourself, or a domain which has not been configured to allow Confirmit servers to send on its behalf by using SPF records, then you risk severely degraded deliverability, and negatively affecting the service as a whole. Also, if an email sent by Horizons is automatically forwarded from one recipient's inbox to another the email may not arrive at the second inbox, as the original DKIM signing and SPF records will not match the originating server.

Note: If you have the system_api_access permission then the email object properties will also include the Activate Logging checkbox. Refer to the Confirmit Administrator Manual for further details.

When you are using the WYSIWYG editor, you will be able to format the text by using the buttons in the formatting toolbar.

7.4.14.1. The Email Details Page Properties and Fields

- **Id** – displays the name/title of the current email object. The default values are “e1”, “e2”, etc. You can enter more descriptive titles.
- **Deleted** – will be chosen if the email object is soft-deleted. If you uncheck the Deleted option, the email object will be undeleted.
- **Read only** – choose this setting if you want the email object to be locked so that no changes are made to it accidentally, either in questionnaire editing mode or when sending email in **Respondents > Emailing**.
- **Include link** – check this box to have a link (URL) to the web interview included automatically at the bottom of the e-mail (default).
- **Send as HTML** – check to send the email as HTML code. Only mail clients that support HTML will be able to read the email.
- **Send as plain text** – check to send the email as plain text. Most mail clients will be able to read it.

  The email object will have two text fields for each language: one for HTML body and one for Plain text body. When sending email to respondents, you can choose to send the email either in one of those formats or in both in one sending. When you choose to distribute the **email in both formats**, the mail clients supporting HTML will use the HTML version, other mail clients will display the text version.
- **Override recipient email** – the respondents' email addresses will normally be in the "email" column of the database. However you may also have 'secondary' email addresses in another column. This would allow you to send the same survey link to another email address, for example the respondent’s manager's address in the event the respondent does not answer the survey. Check to override the respondents’ email addresses with email from another column. You must then choose the column name from the drop-down. Note that you can disable the "No of emails sent column" - see below.
- **Send email FW** – select this option and select a column from the drop-down if you want to forward the survey email to a person, for example the survey manager, in order to notify him/her that the survey has been sent out. The link to the survey will not be included in the forwarded email.

Note: The noOfEmailsSent column will only show the number of emails sent to the respondents in the ‘email’ column.

No specific set names need to be given to columns with forward and override addresses.

- **Send confirmation email** – check this option if you want to receive confirmation email from the system, stating that the emails have been sent.
- **From** - this shows the email address from which the email will be sent, default will be the address of the currently logged on user - you. You can change this if required.
- **Display Name** - The value entered in this field will be displayed in the 'From' field in the email. If nothing is entered in this field, the recipient will see the email address/name entered in the **From** field. Specify a valid email address in the **Reply to** field. When the receiver clicks his/her 'Reply to' button, the email will go to this email address (see Fixed Sender Domain and Email Delivery Report Functionality on page 568 for more information).
- **Reply to** - specify a valid email address in this field. When the receiver clicks the 'Reply to' button, the email will go to this email address.
- **Reply to Display Name -** the name entered in this field will be displayed in the ‘To’ field when the receiver clicks the **Reply to** button. If nothing is supplied, the name entered in ‘Display Name’ will be used. For example, the ‘Reply to Display Name’ could be set to ‘DO NOT REPLY’.

- **Default language** - if respondents do not have a language specified in the 'language' column in the respondent list, if their language is not activated with the **Activate language** setting, or if it does not exist in the current email, they will receive the email in the **default language** selected here. This list contains all the languages selected for the survey. If you set default language to 'None', respondents who do not match any of the activated languages, will not receive any email.
- **Disable update of noOfEmailsSent** - in the event you wish to prevent the email counter from registering the email transmission (for example you may be sending reminders to respondents' managers etc. - see Override Recipient Email above), check this box to disable the Number of Emails Sent column.
- **Additional survey link parameters** - allows you to add custom parameters after the survey link. An example could be:

  ```
  http://survey.confirmit.com/wix/pXXXXXXXXX.aspx?__sid__=encryptedid&code=
  1
  ```

  where **code=1** is the additional parameter. This could previously be achieved by constructing the URL by piping in **^sid^**and **^respid^**, however this was not possible with encrypted system request parameters in the URL. This field allows you to include additional URL parameters in the survey link in email when using encrypted system request parameters. The field supports piping from the respondent list (with ^s). It works both for piped links (with ^slink^ or ^secureslink^) and when the "include link" checkbox is selected.
- **Custom headers** - use this field to add custom headers to the email. The syntax is:

  X-name:value

  X-name2:value2

  You can use piping to "personalize" the email. Here the syntax is:

  X-name:^pipedValue^

  These headers will be added after the internal Confirmit headers. Note that you cannot use the X-Confirmit prefix in custom headers.
- **Custom survey link text** - (located at the bottom of the page) allows you to insert clickable text instead of the survey URL in HTML email. Note that this applies only to HTML email. This could previously be done by constructing the URL by piping in ^sid^ and ^respid^, but it was not possible with encrypted system request parameters in the URLs. This field makes it much simpler to create a text such as "Click here to take the survey", or even include an image tag. The correct < a href=---> tag will be created in the HTML. This works both for piped links (with ^slink^ or ^secureslink^) and when the "include link" checkbox is selected.

In multilingual limited surveys, you can upload the respondent list with a column 'language' where each respondent's language is specified (see Handling Respondents in Limited Surveys on page 540 for more information). If email subject and body has been entered and the **Activate language** property is chosen in the email object, the system will send email in the correct languages to the respondents. The system will automatically select the Encoding that has been assigned to a language on the server.

7.4.14.2. Fixed Sender Domain and Email Delivery Report Functionality

All Confirmit SaaS customers have access to the Fixed Sender Domain and Email Delivery Report functionality. This functionality reduces the risk of emails being treated as spam, and gives users the option to see the status of sent emails through the Email Delivery Report (see Email Delivery Report on page 578 for more information).

This means that if you are working in the SaaS environment, you will by default have either the "@us.confirmit.com" or the "@euro.confirmit.com" sender domain in the **From** field when you send emails via **Respondents > Emailing**. You can manually override this fixed sender domain by typing another sender domain into the Email, but you should be aware that in these cases 1) incomplete Email Delivery Reports will be generated, and 2) the emails are more likely to be interpreted as spam by recipient servers because the sender email domain will not match the sender server domain.

When using the default fixed sender domains "@us.confirmit.com" or "@euro.confirmit.com", you can still receive feedback from respondents when they reply to your email. To receive reply mails, you will have to specify a valid email address in the **Reply to** field.

Note that "Out of Office" replies will always be sent to the From address according to the emailing standard.

Note: Customers using Confirmit SaaS environments who have specified their own fixed sender domains, will keep these domains.
On-Premise clients must license the Premium Emailing add-on to access this functionality. On-Premise clients should contact their Account Manager for further information.
This functionality will not work in Lotus Notes; only the email address will be displayed.

Important
When adding a From address, if you add the wrong domain, a custom domain you do not control yourself, or a domain which has not been configured to allow Confirmit servers to send on its behalf by using SPF records, then you risk severely degraded deliverability, and negatively affecting the service as a whole.
Also, if an email sent by Horizons is automatically forwarded from one recipient's inbox to another the email may not arrive at the second inbox, as the original DKIM signing and SPF records will not match the originating server.

Read more about the Email Delivery Report functionality in the Email Delivery Report section.

7.4.15. The Chart Object

The Chart object can be used in all surveys that use Survey Layouts (see Survey Layouts on page 65 for more information), and it is also used as the "results presentation mode" in Poll surveys (see Poll Surveys on page 335 for more information). The Chart object provides simple reporting of results on a specified question, and is ideal for use where you need "instant" feedback to the respondent. Single, Multi and Grid questions are supported.

Note: A Chart object can show a maximum of 50 categories. That is, you cannot base a chart on a question that has more than 50 answer alternatives.
Also, you cannot link from a chart to a question placed inside a loop.

Important
If you add a chart to your survey and you also wish to enable the "Create database row only after first page submission" option in the Web Options tab (see The Web Options Tab Properties on page 504 for more information), ensure there is something interactive before the chart otherwise the chart can display double results.

When you create a Poll, a chart object is automatically included on the second page of the Poll survey. For other surveys you can add a chart object in the normal manner. Double-click on the Chart object in the Questionnaire Tree toolbox to open the Question Details page for the chart.

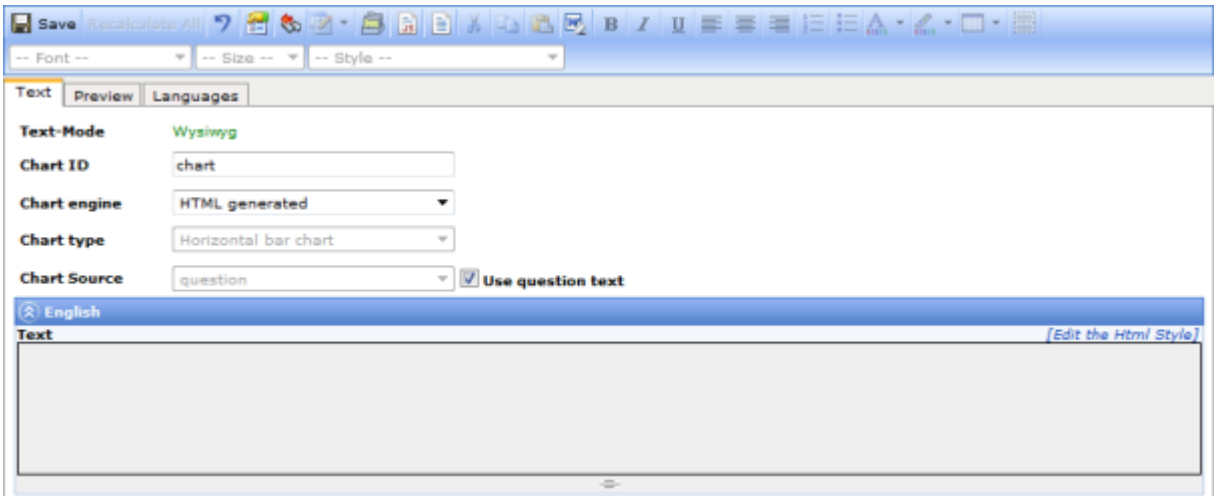


Figure 323 The Question Details page > Text tab for an HTML Chart object

- **Chart ID** - the question ID for the object. By default this will be "Chart" followed by a digit denoting the creation-number of the object.

- **Chart engine** - the application used to generate the chart. The Chart object can currently render two chart engines:
    - **HTML** - (default) only bar charts can be rendered.
    - **Google Chart** - bar, column, pie and line charts can be rendered.

Important
If you select the Google Charts engine your data will be sent to the Google processor, where the chart will be created and returned. Confirmit has no control over the Google Charts functionality, and can therefore not guarantee that the engine will be available at any particular time, nor that it will function as expected.

- **Chart type** - if you select Google Chart as the chart engine then you can select the type of chart that is created.
- **Chart Source** - the source of the data from which the chart is to be created. Click the down-arrow and select the question you wish to use from the list of Single, Multi and Grid questions in the questionnaire.
- **Use question text -** check to use the text from the question in the chart. All the text fields on the chart object will then be disabled, and when the survey is generated the texts are copied over from the data source. Default is checked when creating a new poll, unchecked for a chart in a standard survey.

The Title and Text fields allow you to add text to the chart. A set of fields will be presented for each language selected.

Note that the Chart object has an additional button in the toolbar - **Recalculate All**. Use this button to recalculate the chart data, for example when answers are added, removed or changed, or respondents are uploaded. The button will only be enabled after the survey is launched with the chart node present.

The Preview tab displays a preview of the chart created using pseudo-random data, and the Language tab allows you to select which language fields are to be displayed.

Note: The Preview page presents a set of pseudo-random data so that you can see how the chart will look to the viewer.

7.5. Using Survey Layouts

Note that you can create a more customized look and feel for your surveys with Survey Layouts (see Survey Layouts on page 65 for more information).

7.6. The Secondary Project Toolbox

The Secondary Project toolbox allows you to copy individual questions or complete folders containing several questions from another survey and into the currently open survey. To display the Secondary Project toolbox, right-click in the Toolbox header bar and check the Secondary Project box. Note that surveys displayed in this toolbox will be displayed in Read Only mode.

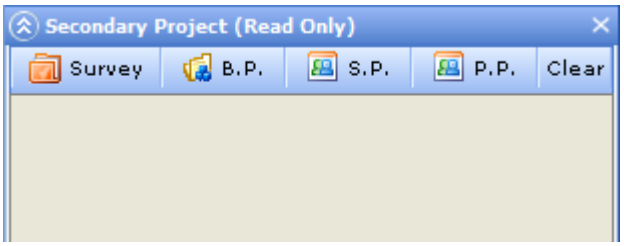


Figure 324 The Secondary Project toolbox

To copy a question or folder into the current survey:

1. Ensure the survey **into which** you wish to copy a question, is open in Authoring.
2. Open the Secondary Project toolbox (if it is not already visible).

3. Click the **Survey**, **B.P.** (Basic Panel), **S.P.** (Standard Panel) or **P.P.** (Professional Panel) button as appropriate, depending on the type of survey or panel the question you wish to copy is currently located in.

   An overlay displaying all the surveys or panels available to you opens.

Note: When working with a survey that is linked to a Professional panel, the Panel will automatically open in the Secondary Project toolbox and you can drag-and-drop variables from the Panel to the survey. The variables dragged into the survey will automatically be set as visible panel variables (see The General Tab on page 251 for more information).

4. Find and select the survey **from which** you want to copy the question/folder, and click **Use this survey**.

   The selected survey's questionnaire tree opens in the Secondary Project toolbox.

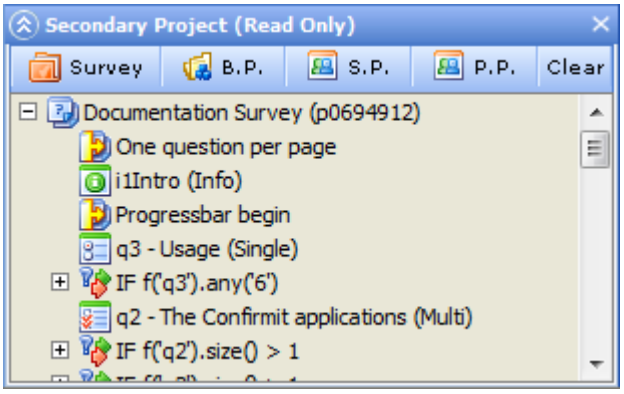


Figure 325 Example of the Secondary Project questionnaire tree

5. Copy questions and/or folders from the secondary project into the current survey by dragging them from the secondary project toolbox and dropping them into the Questionnaire Tree toolbox at the appropriate place.

To view the Secondary Project objects, double-click on an object in the Secondary Project toolbox. This opens the object in the Question Details window. However, note that you cannot make and save changes to the Secondary Project objects here. If you wish to make changes to the secondary project, you must open that survey as the "Current" survey in Authoring.

Note: If the current survey and the secondary project use different languages, then when a question is copied into the current survey, its language fields will be empty.

When the Secondary Project toolbox is opened it will contain the last secondary project selected by the current user, wherever the user logs in. To remove a survey from the toolbox, click the **Clear** button.

7.7. Editing the Routing

You reorganize the routing mainly by dragging and dropping in the routing-tree. To expand the questionnaire tree, right-click on the top folder and choosing **Expand All** from the menu.

7.7.1. Finding Questions or Nodes in the Questionnaire

In the event your questionnaire is extensive and you need to for example edit a question or node, you can use the Quick Find functionality for locate the question or node in the Questionnaire Tree.

1. In the Questionnaire Tree, right-click on the survey root node (the top item in the tree) and select **Quick Find** from the drop-down menu.

   The Quick find overlay opens.

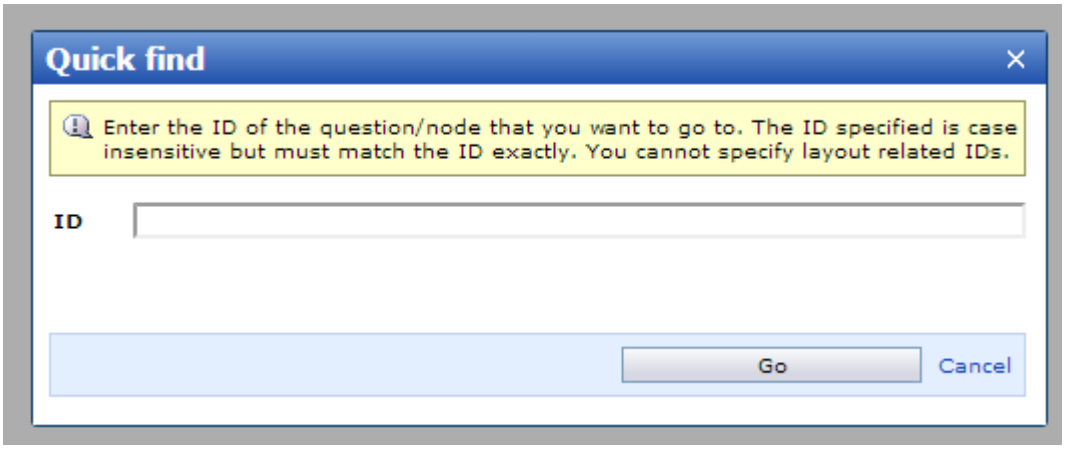


Figure 326 The Quick find overlay

2. Enter the ID of the question or node that you want to go to.

   The ID specified is case insensitive but must match the ID exactly. You cannot specify layout related IDs. When you have typed in the name, the system will locate the question or node and show it below the field.

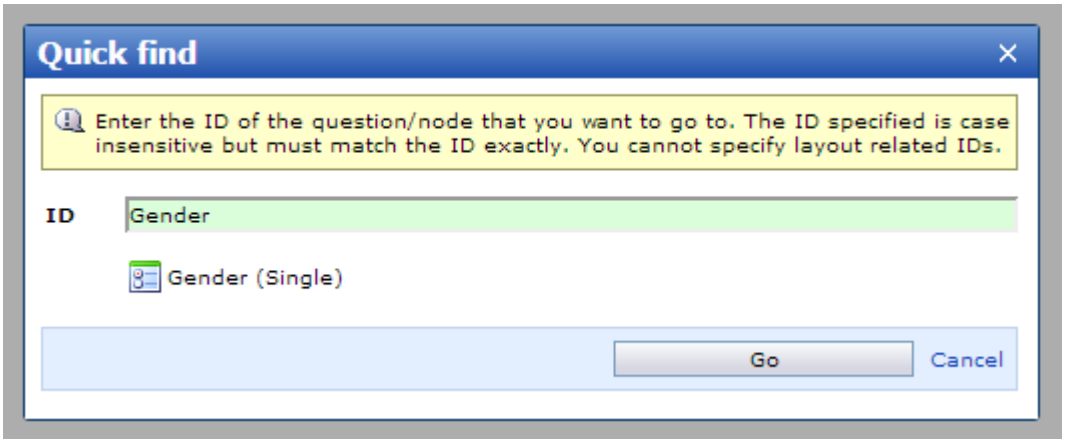


Figure 327 Having identified the question

3. Click **Go**.

   The question/node is highlighted in the Questionnaire Tree and is opened in the Question Details page.

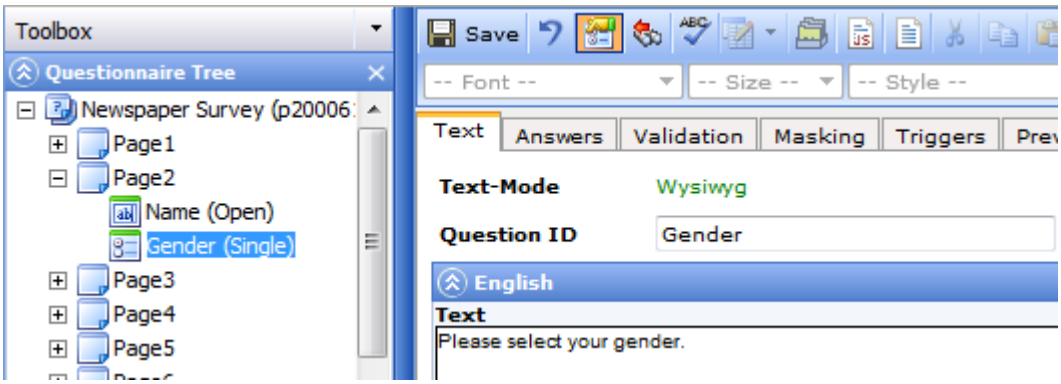


Figure 328 The question is located in the Questionnaire Tree and opened in the designer

7.7.2. Moving an Object

To move an object (and its children, when moving folders, loops, 3D Grids and conditions):

1. Left-click the *text* of a routing object in the tree.

   This will make the object turn **blue**.

2. Keep pressing the button, and start dragging.

   After moving the mouse a few pixels, a little square drag-object will appear to the right of the mouse-pointer, indicating that you are dragging an object. A dashed line indicates the destination of the object you are dragging.

3. When the indicated destination is correct, release the mouse button. To drop objects into folders, Loops, 3D Grids, point to the folder icon with the mouse pointer and release the button.

   If you want to cancel the drop-operation while dragging, press the **<ESC>** button. Do not just drop the object "out of sight".

   If the destination object is out of view because the routing is long, point on the scrollbar to scroll up and down slow or fast. Keep the mouse-button pressed whilst scrolling.

When you drop the object, it will be moved to the new location as long it is dropped on a valid destination. An example of an invalid destination is one of the objects in the *New objects* toolbox.

Note: If you wish to change default question IDs, read carefully the Question ID section (see Question Properties on page 251 for more information).

7.7.3. Duplicating an Object

Duplicating creates a copy of the source object. To duplicate, hold down the **<CTRL>** key on your keyboard before you drop the object, or right-click on the object to be duplicated and choose **Duplicate** from the menu.

7.7.4. Selecting Multiple Objects

If you want to move or duplicate several objects simultaneously, select the first object, hold **<SHIFT>** or **<CTRL>**, and select another object. **<SHIFT>** will multi-select consecutive objects and **<CTRL>** will multi-select specific objects. To drag the selected objects, hold **<SHIFT>**, click the last selected object, and start dragging. You may release the **<SHIFT>** key while dragging, and use the **<CTRL>** key to duplicate objects when dropping (see Moving an Object on page 315 for more information). You can also hold the mouse pointer over the folder while moving the objects to drop them into the folder.

7.7.5. Deleting Objects

To delete an object, select it and press the **<Del>** key on your keyboard, or right-click on the object and select **Delete** from the drop-down menu. This will remove the selected object from the routing.

Note however that after this initial deletion operation the object is not "irretrievably deleted"; it is flagged as having been deleted from the routing and is both hidden from view and logically removed from the survey. If you later find that you need the object you can "Undelete" it, or if you wish to permanently remove it you can do so.

To undelete objects, right-click the survey folder and choosing **Show deleted** from the menu. The routing will be refreshed and all deleted objects will appear as grayed-out in the routing-tree. You can then either right-click on the soft-deleted items and choose **Undelete** from the menu, or you can access the *Properties* page for the deleted object you want to recover (see Question Properties on page 251 for more information), and uncheck the **Deleted** flag.

Note: If an object is already marked as deleted, and you delete it again from the Show Deleted state, it will be deleted permanently, and cannot then be recovered.

7.7.6. Pitfalls

Due to Internet-browser limitations, some of the drag and drop operations may not be as intuitive as they are in a normal Windows-based application:

When picking up an object to drag, point to the **text** of an object, not the **icon**; you cannot drag the icon.

7.8. Scratchpad

The scratchpad is a simple text editor that is available in a number of the Confirmit pages. If you paste text into the scratchpad, for example from a Word file, you can drag-and-drop or copy-and-paste the text into text boxes, grids, etc. The content of the scratchpad is stored locally in the web-browser, and is available as long as the web-browser is open, or until the session times out. The entire questionnaire can be pasted into the Scratchpad.

If you copy or drag multiple lines of text from the scratchpad into a question's Answer list, each row of text selected in the scratchpad will become a separate option in the answer list (additional rows will be created automatically in the list to accommodate the answers).

7.9. Folders

To organize your questionnaire, create folders in the routing. For example, put all demographic forms into one folder. To place an object inside a folder, point to the folder icon when dropping. The folder fields are as follows:

- **Name** - The name of the folder (is displayed in the routing-tree).
- **Description** - A description of the folder.

Folders make it easy to move a set of related routing objects around within the questionnaire. When you move a folder, all the objects inside the folder will be moved, too.

7.10. Grid View

The Grid View gathers together on one page the input text fields (texts, answers, titles instructions etc.) and some properties of selected objects from the questionnaire tree. This allows you to edit several questionnaire objects simultaneously in all survey languages. You can edit the properties in the page and save the changes there. All questionnaire objects except Quotas may be edited in Grid View. To use the Grid View functionality:

1. In the Questionnaire Tree toolbox, select the nodes you wish to display in Grid View (click on the survey folder node if you wish to display the entire survey).
2. Right-click on the selected nodes and select **Grid View** from the menu.

All the nodes that have been selected are displayed on the Grid View page in separate "forms". The "current" node form (the one you last worked with) has an orange title bar; all the others are blue.

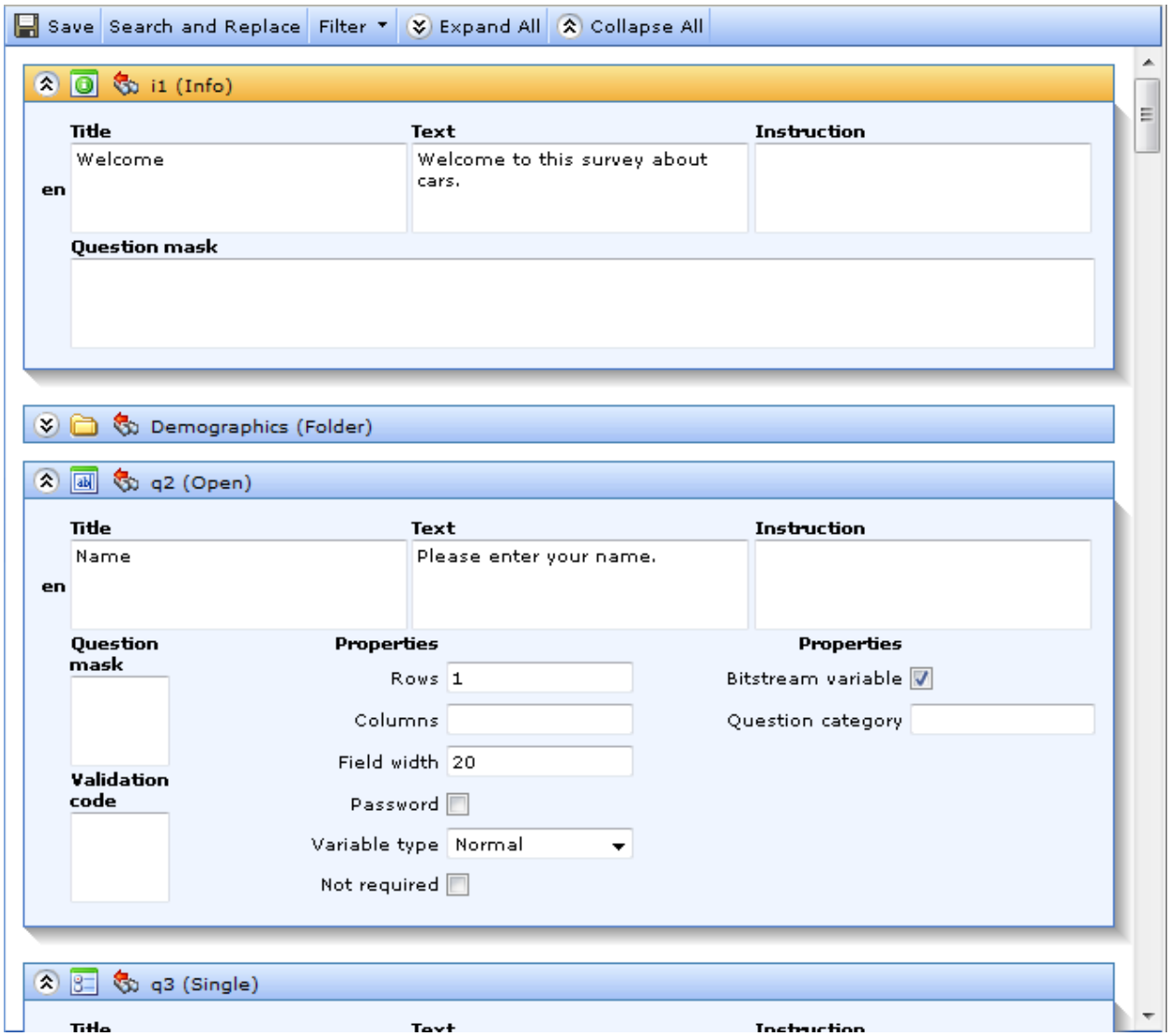


Figure 329 Three nodes listed in the Grid View

The Grid View page toolbar contains the following buttons:

- **Save -** click to save any changes you may have made to the texts or properties in the nodes.
- **Search and Replace -** opens the Search and Replace dialog (see Grid View Search and Replace on page 322 for more information).
- **Filter -** opens a drop-down list of the various filter options available (see Using the Filter Options on page 321 for more information).
- **Expand All -** expands any node forms that have been collapsed such that the contents of all forms are visible.
- **Collapse All -** collapses all the node forms such that only the title bars are visible.

7.10.1. The Grid View Form Layouts for Various Node Types

If you have checked all the filter settings and you open Grid View for a Single question or the result of a search brings up a Single question, the pane shown below will be displayed. Here you have access to and can edit all the fields in the node.

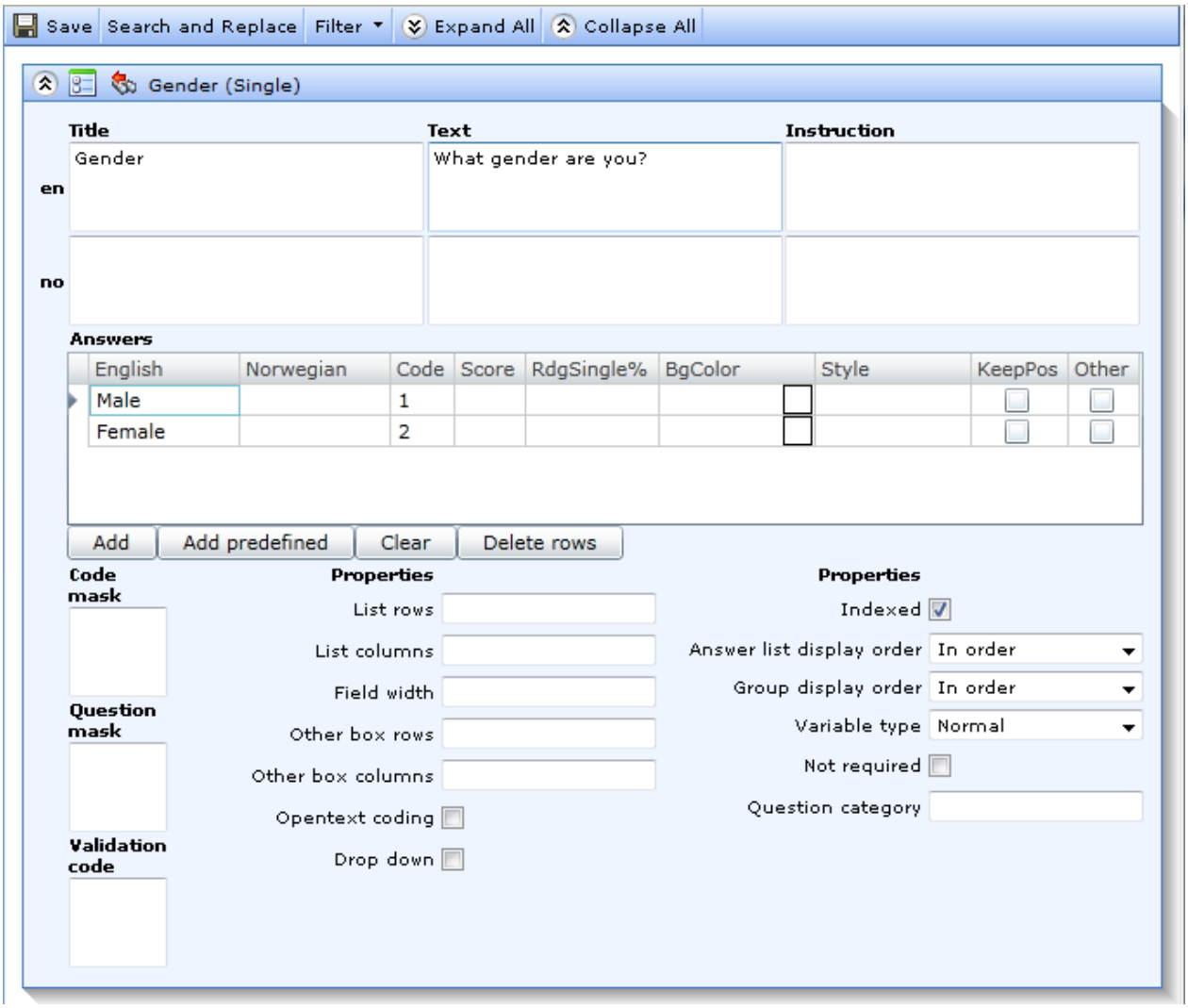


Figure 330 Grid View for a Single Question

A number of properties may also be edited here.

The figures below show some examples of how various node types will be presented in Grid View. The first shows a Grid View of an Information node.

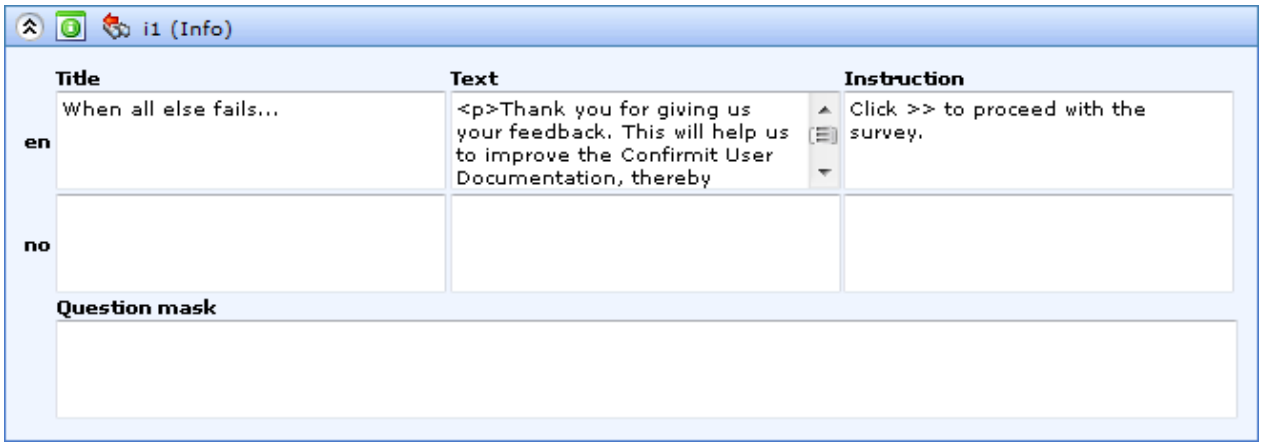


Figure 331 Information Node Grid View

This shows a Grid View of an Open Text question:

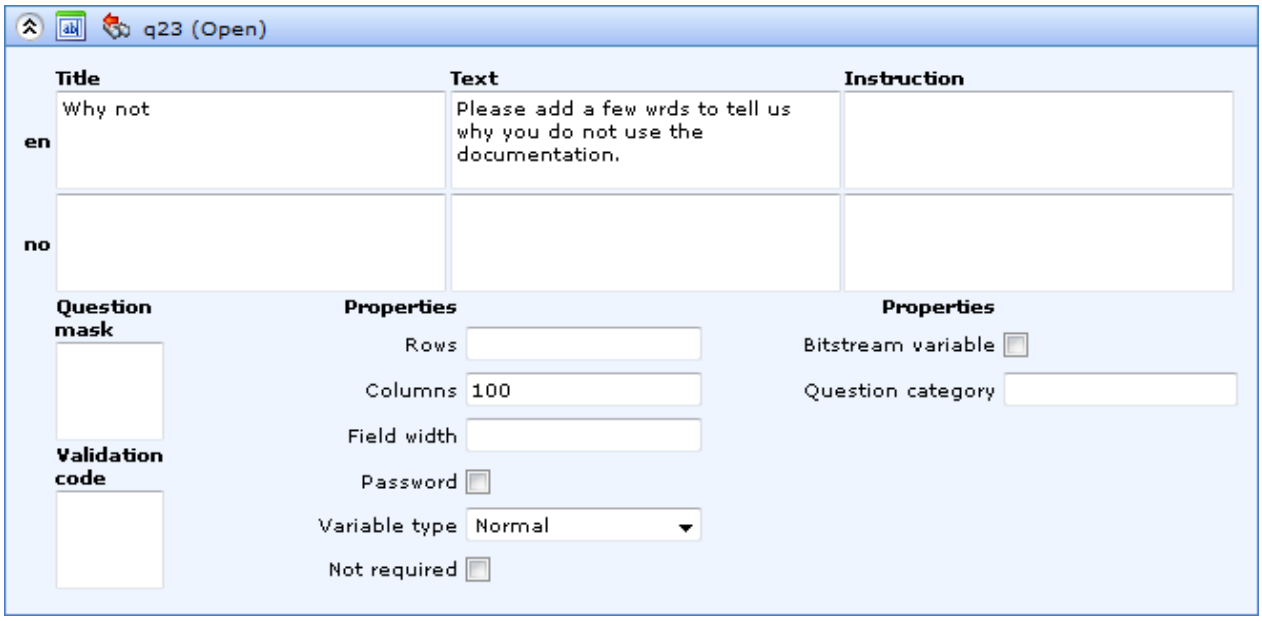


Figure 332 Open Text Grid View

This shows a Grid View of a Grid question:

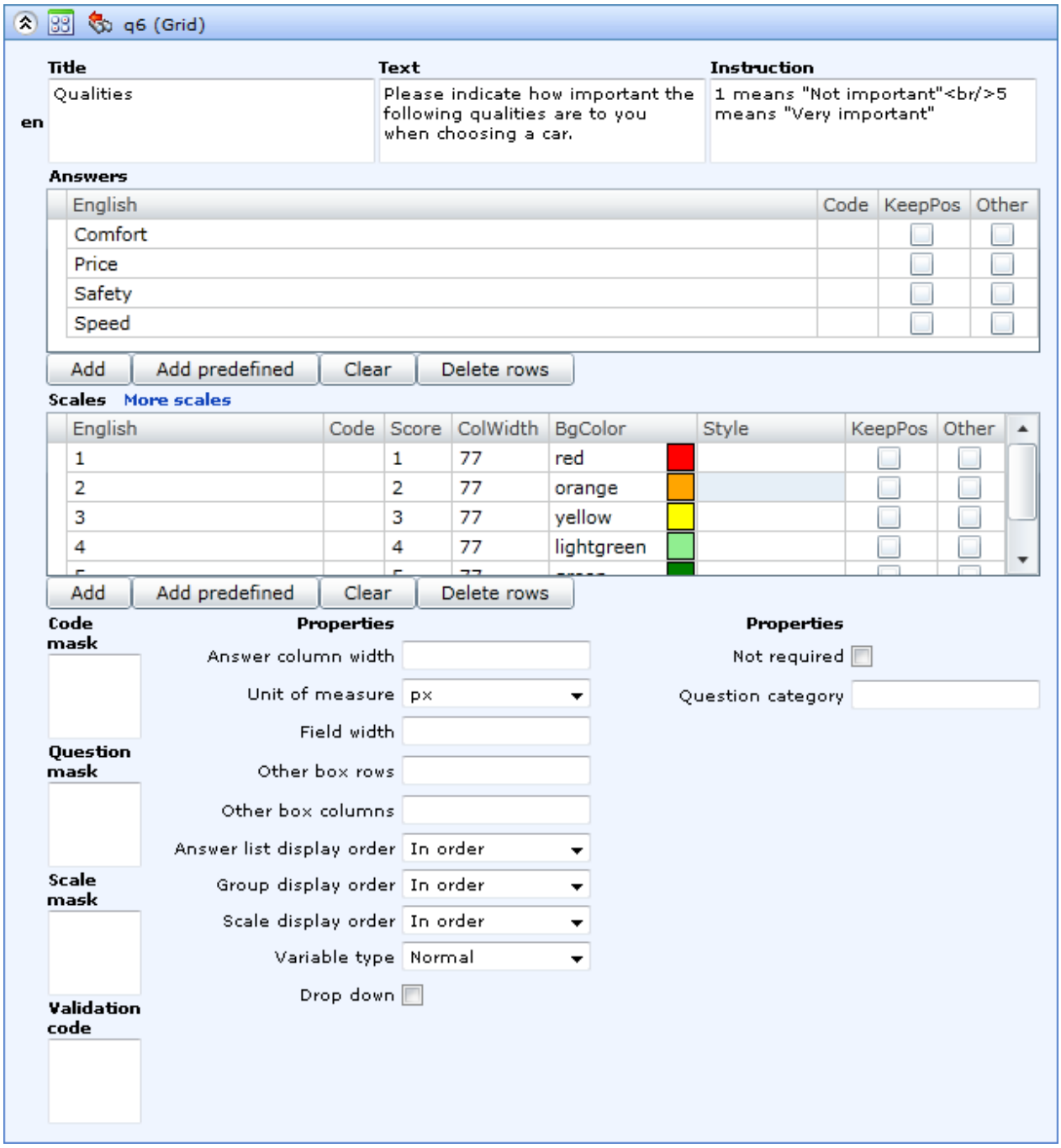


Figure 333 Grid Question Grid View

This shows a Grid View of a Reusable Scale/List folder:

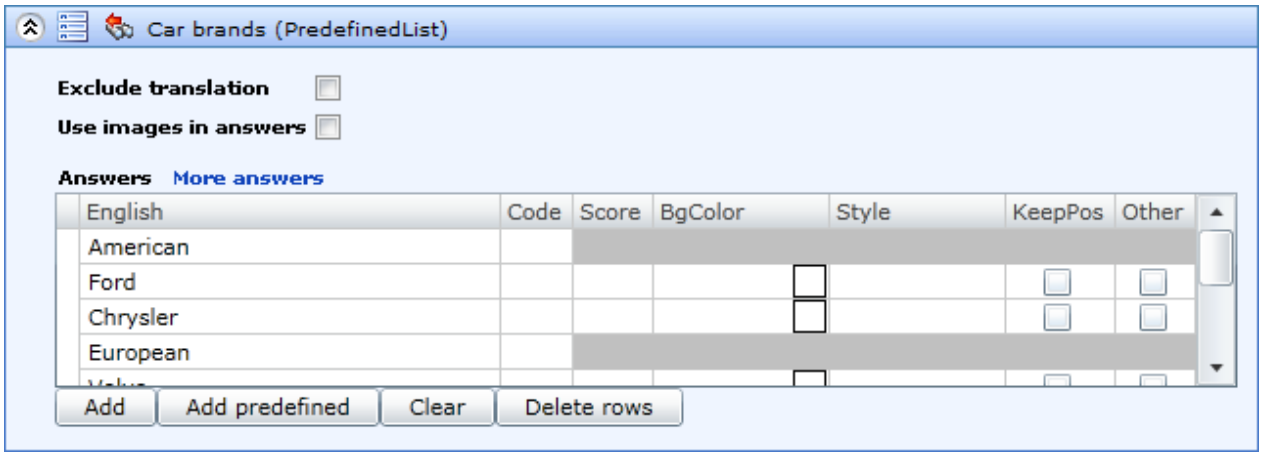


Figure 334 Reusable Scale/List folder Grid View

Note that any changes you make in the Scales and Lists in the Grid View, when saved, will be applied to all questions where the Scales/Lists are used.

This shows a Grid View of a Condition:

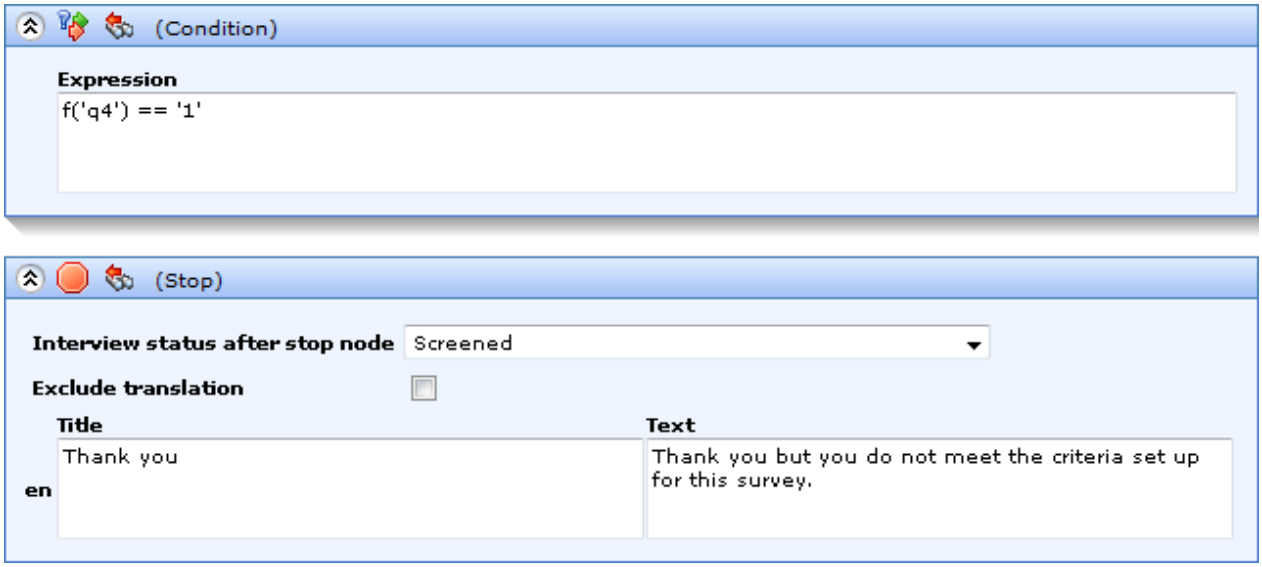


Figure 335 Condition Grid View

7.10.2. Using the Filter Options

If you are searching for questionnaire nodes that you know have your search criteria in specific areas, for example in the Answers and Scales, use the Filter options.

1. In the Grid View Toolbar, click on the **Filter** button.

   The Filter drop-down opens.

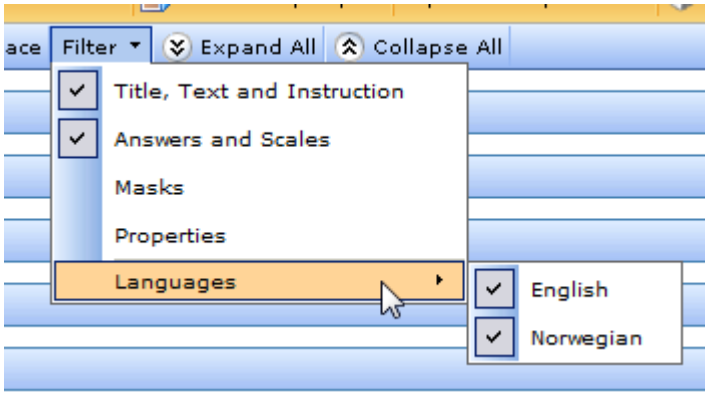


Figure 336 The Grid View Filter options

2. Click on the various options to toggle the selection on and off. Under Languages, all the languages selected for the survey are listed; uncheck those you do not wish to include in your search.
3. On completion, click out of the drop-down to close it then perform a new search.

7.10.3. Grid View Search and Replace

Use the Search and Replace functionality to find specific words and phrases and replace them with other text. To use the functionality:

1. In the Questionnaire Tree toolbox, using standard Windows techniques select the nodes you wish to search through (click on the survey folder node if you wish to search through the entire survey).
2. Right-click on the selected nodes and select **Grid View** from the menu.
3. In the Grid View toolbar, click **Search and Replace**.

   The Search and Replace input dialog opens.

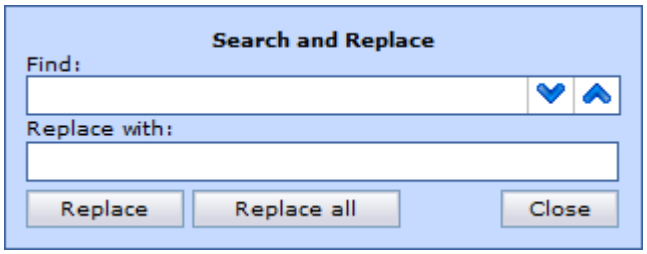


Figure 337 The Grid View Search and Replace input dialog

4. Type into the Find field the text you wish to look for.

   A search is performed, and any fields in the selected nodes that include the text will be shaded yellow. The total number of instances of the text found in the selected nodes is indicated beside the Find field; use the arrow buttons to move to other instances of the text .

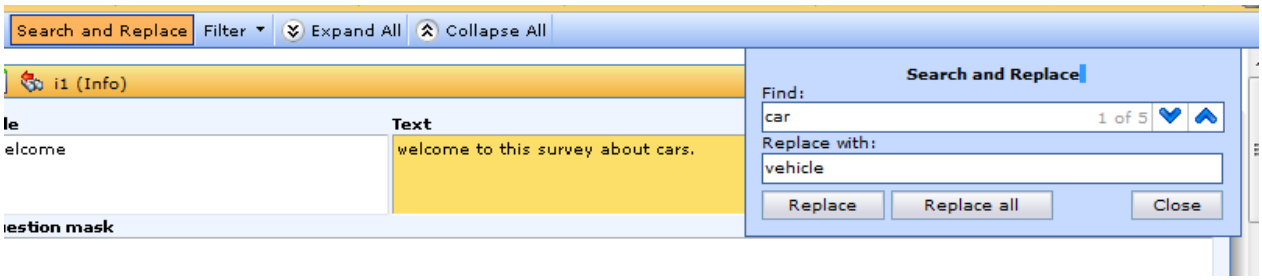


Figure 338 Using Search and Replace

5. Type into the Replace With field the text you wish to be added instead of the "Find" text.
6. Click **Replace** to replace the current instance; click **Replace All** to replace all instances in the selected nodes.
7. On completion, click **Close** to close the dialog, then **Save** to save any changes you have made.

7.11. Search

Search is a part of the Grid View functionality. It allows you to edit several questionnaire objects simultaneously, on one page, and in all survey languages. Search allows you to enter search criteria to find the items you are looking for, then presents those items on one page for easy editing. You can edit the texts in the page and save the changes there.

All questionnaire objects except Quotas may be edited in Search Grid View. The Search function can be used:

- On the entire survey by highlighting the survey title folder. You can then edit all the objects in the questionnaire and Scales/Lists.
- On the entire Routing folder. You can then edit all the objects in the questionnaire.
- On folders. You can then edit all the objects in the folder.
- On conditions. You can then edit all the objects subordinate to the conditional expression.
- On single nodes in the questionnaire.

To use Search:

1. Select one or more objects in the questionnaire tree or a Scale/List.
2. Right-click on one of the selected objects and select **Search** from the drop-down menu.

   The Search Options page opens .

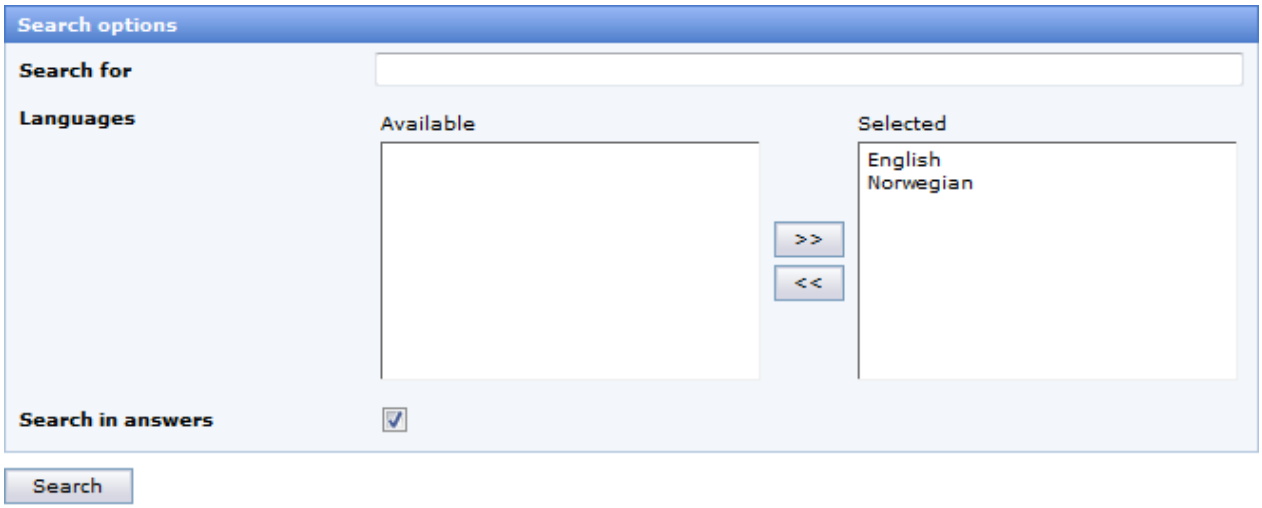


Figure 339 The Search Options page

3. Type the word or text you are looking for into the Search For field.
4. Select the language(s) you wish to search through (all the survey languages are listed; remove those you do not wish to search through).
5. If you do not also wish to search in the answers, uncheck the box.
6. Click **Search**.

   In the event the search finds no hits, the Search Options page remains visible and a message informs you that no results were found. In the event some hits were found, the Grid View opens.

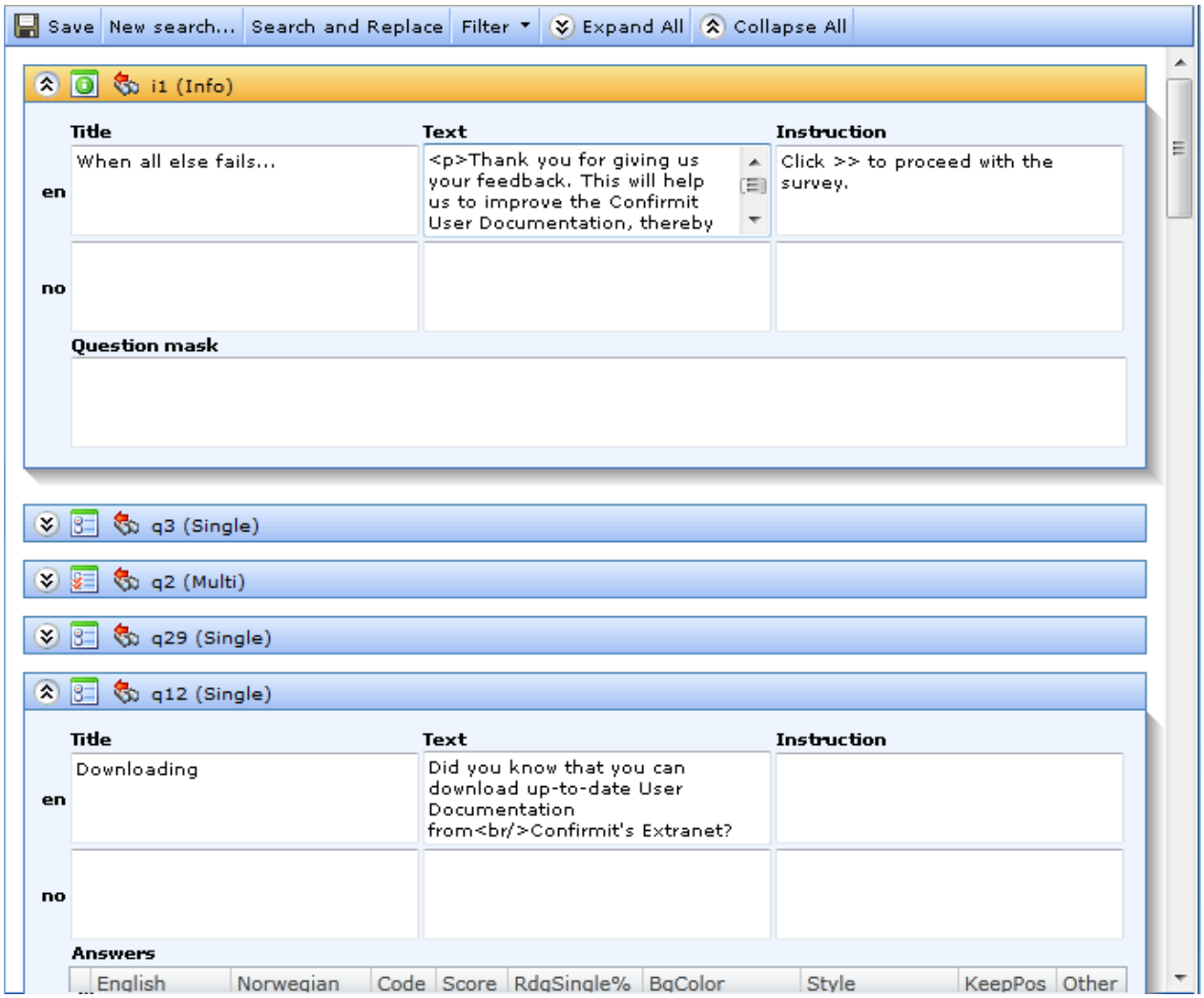


Figure 340 Example of a search result

All the nodes in which the search criteria were found are listed. You can now edit the texts as required (see Grid View on page 316 for more information).

7.12. The Change Log

Any changes that are made to the survey are logged. This includes all changes to questions and nodes, emails, pre-defined lists, quotas conditions, survey settings and changes incorporated from a secondary survey.

- To view the change log for the entire survey, right-click on the survey node in the Questionnaire Tree and select **View Change Log**.
- To view the change log for a specific node, right-click on that node in the Questionnaire Tree and again select **View Change Log**.

Once you have the change log open for the report or a specific node, you can view all the changes for that item or you can filter the list for any changes incorporated by a specific launch. To filter, go to the Launched Version Filter drop-down in the upper-right corner of the log page and select the appropriate launch, then click the **Search** button.

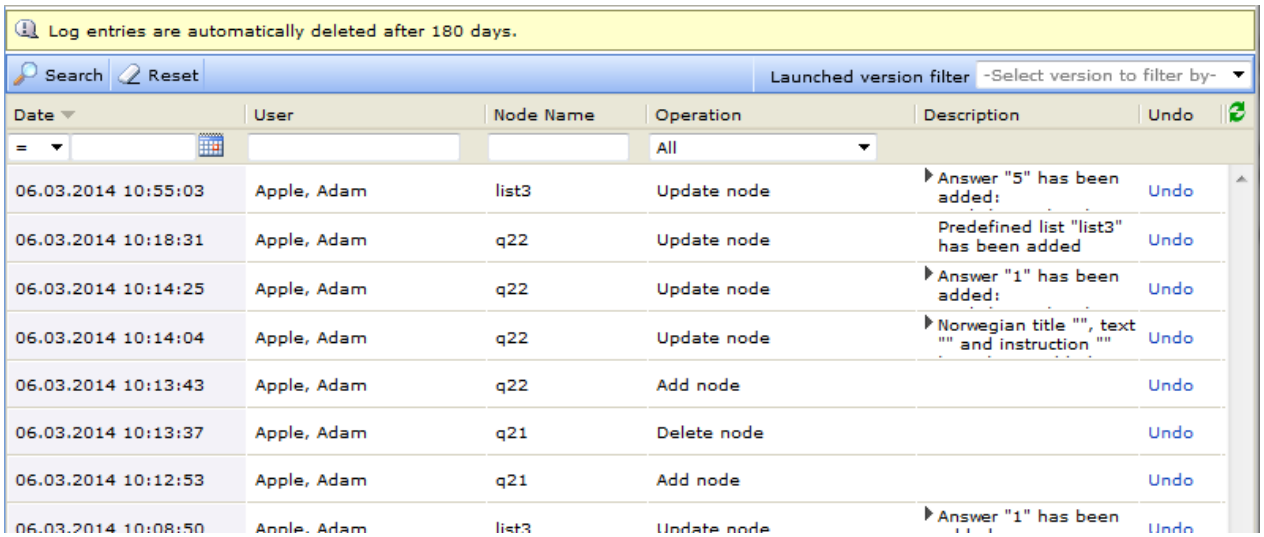


Figure 341 Example of a change log for a survey

You can sort the list by any column, and search by date, user, node or operation. The last change that has involved editing a node, for example a change to text or properties, can be undone - click the **Undo** link for that logged item. Note that this undo function only undoes the last change.

Note that changes to quota cells are aggregated; if a number of changes were made to the cells in a quota then the changes will be logged once as for example "5 changes were made to quota_1".

Hover your mouse cursor over an item in the Description column to view a full description of the change.

Click **Reset** to clear the filter and re-display the full list.

Important
Log entries are automatically deleted after 180 days. There is currently no way to delay the deletion or export the log data, and the data cannot be retrieved.

7.13. Spell Checker

Note: Spell Checker is based on third party software and is a chargeable Add-On.

The Spell Checker functionality enables Survey Managers to check all entered text (both questions and answers) in a survey for spelling errors. The functionality allows you to check one question at a time.

7.13.1. Supported Languages

The following languages are supported by Spell Checker (in alphabetical order):

Language	Country
Afrikaans	South Africa
Bulgarian	Bulgaria
Catalan	Spain
Croatian	Croatia
Czech	Czech Republic
Danish	Denmark
Dutch	Netherlands
English	Australia

Language	Country
English	Canada
English	New Zealand
English	United Kingdom
English	United States
French	France
German	Germany
German	Switzerland
Hebrew	Israel
Indonesian	Indonesia
Irish	Ireland
Italian	Italy
Lithuanian	Lithuania
Malay	Malaysia
Norwegian Bokmaal	Norway
Norwegian Nynorsk	Norway
Polish	Poland
Portuguese	Brazil
Portuguese	Portugal
Romanian	Romania
Russian	Russia
Scottish Gaelic	Scotland
Slovenian	Slovenia
Spanish	Mexico
Spanish	Spain
Swedish	Sweden
Ukrainian	Ukraine

7.13.2. Using Spell Checker

To check a question for spelling errors:

1. Right-click on the question in the questionnaire tree and choose **Spell Check** from the menu.

   The Spell Checker page opens, highlighting any words that the dictionary does not recognize.

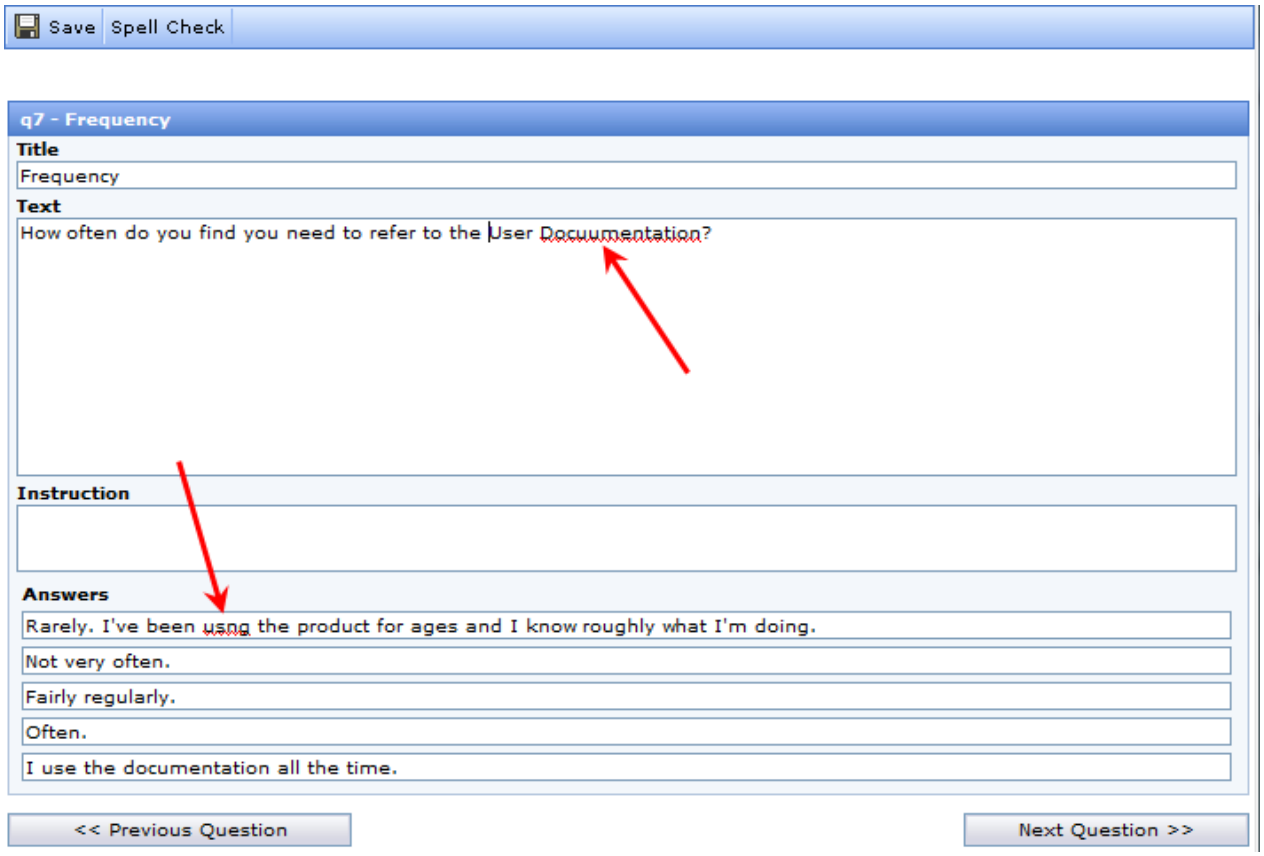


Figure 342 The administration window for the Spell Check functionality

All text fields of the question are displayed. The figure above shows a Single question. Note that by default the first survey language is displayed in the Spell Checker page. If you want to check spelling for other survey languages (see Supported Languages on page 326 for more information), go to the Language selection field in the center of the lower frame of the Confirmit window and select the language you wish to work with.

2. In the Spell Checker page toolbar, click the **Spell Check** button to display the Spell Checker window.

   If you wish to relocate this window, click in the window header and drag it to the desired location.

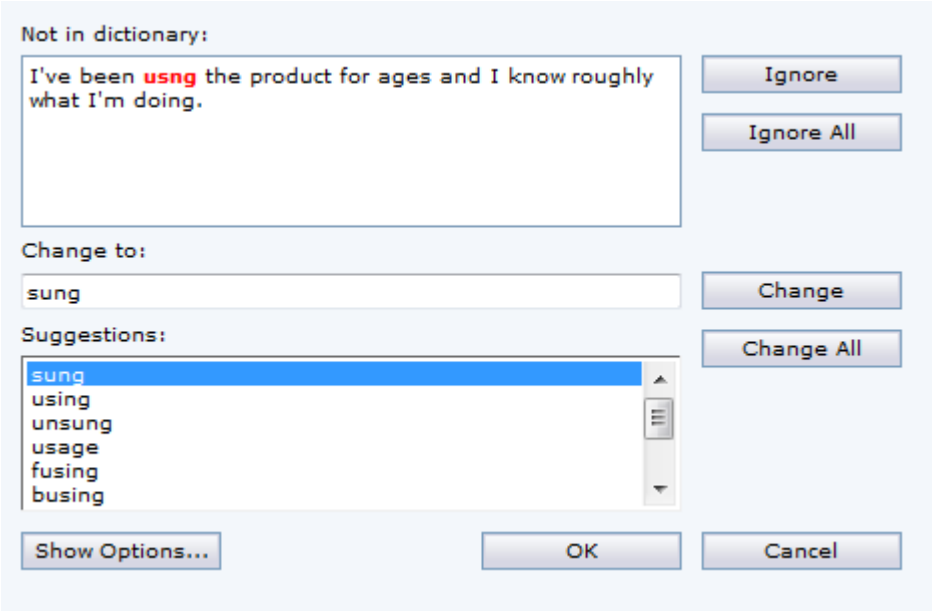


Figure 343 Using the spell checker

The first spelling error the Spell Checker finds will be highlighted. The un-recognized word will be displayed in red text in the *Not in dictionary* field, and any available suggestions will be listed in the *Suggestions* field.

3. Select a suggestion and click **Change** or **Change All** to move to the next error, or edit the word "manually", as desired.

   The button functions are as follows:

- **Ignore** - the current occurrence of the spelling error will be ignored.
- **Ignore All** - all occurrences of the spelling error will be ignored in a text field (title, text, instruction, answers).
- **Change** - The current occurrence of the spelling error will be changed to that selected in the Suggestions field.
- **Change All** - all occurrences of the spelling error will be changed in the current field (title, text, instruction, answers) to that selected in the Suggestions field.
- **Show Options -** the Spell Check options are displayed below the button row.
- **OK -** when you are happy with the text, applies the changes and closes the window.
- **Cancel**- no changes are applied to the current question, and the Spell Checker window is closed.

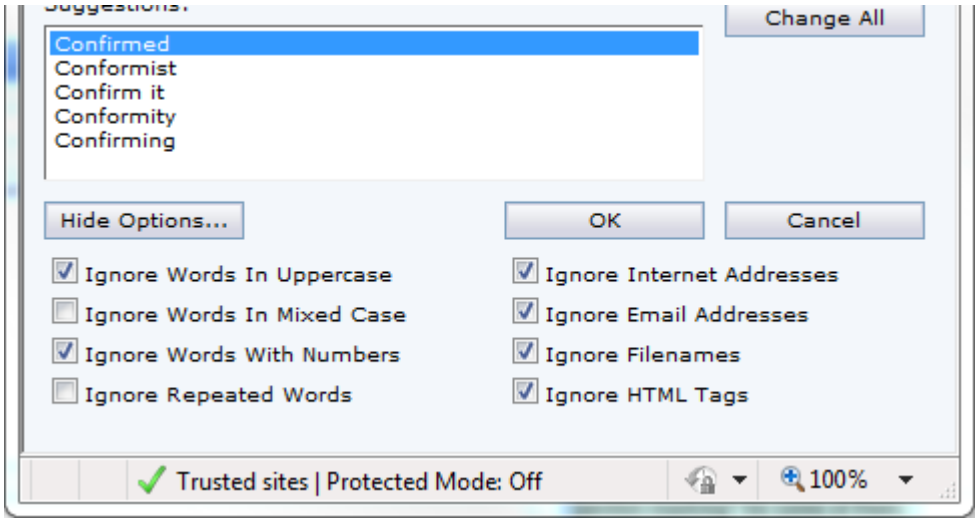


Figure 344 The Settings window

In the Options window, choose the criteria you want the Spell Checker to use when searching for spelling errors. To save the selected settings, click the **Hide Options** button. The settings will be saved and the options area will close.

4. Once you have completed checking the texts in the current question, click **OK** to apply the changes to the question, close the window and return to the Spell Checker page in Confirmit.
5. You can now click **Next Question** to move on through the questionnaire, and again click **Spell Check** to open the Spell Checker window in the event you find an error.
6. When you have finished, click **OK** to apply the final changes and close the window. In the Spell Checker page, you must then click **Save** to save the corrections and to apply them to the questionnaire.

If a reusable answer list is used in a question, and there is a spelling error in the answer list, the correction will be applied to the list itself (in Scales and Lists), and to all questions in which this list is used.

7.14. Questionnaire Reviewer

This functionality enables Horizons authors to allow third-parties access to a limited part of Confirmit so the third-parties can review and make minor changes to Confirmit questionnaires.

Note: Questionnaire Reviewer is a chargeable Add-On. If your company has not licensed the add-on, you will not have access to the functionality.

As a Horizons author, you can set up and send invitation emails to specified reviewers. Each email will include a link to your survey. When the reviewer clicks the link he/she is taken directly to the survey – the reviewer does not need access to Authoring. The reviewer can then make changes to the survey, for example perform or check the text translations or proof-read the texts. When the reviewer has completed the job and clicks **Exit**, an email is sent to you as the survey owner, detailing the changes that have been made and who has made them. You then have the opportunity to check the changes.

7.14.1. How to Set up the Questionnaire Reviewer

1. When you are in the survey you wish to send to the reviewer(s), go to the **Designer > Questionnaire Reviewer** menu command.

   Here you have two options: **Settings** and **Emailing**.

2. Select **Settings**.

   The Questionnaire Reviewer - Settings overlay opens.

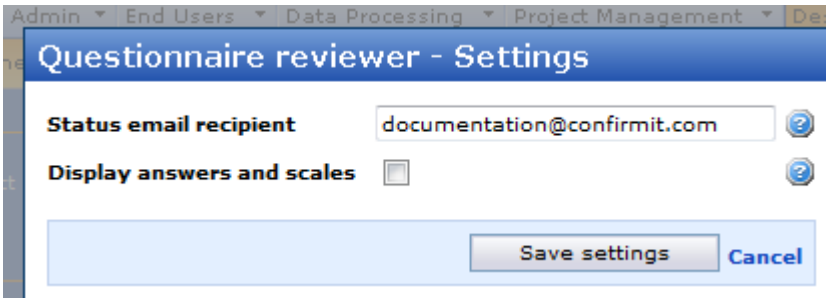


Figure 345 The Set Questionnaire Reviewer Settings dialog

The options here are:

- **Status email recipient –** this is the email address to which the status email will be sent when the reviewer exits the editing interface. This will normally be your address, so you can monitor the changes made by the reviewer. The email will state who has made the changes and will include a list of the changes made so you can view them.
- **Display answers and scales –** changing answers and/or scales may disrupt the logic within the survey, so this should only be done by an experienced Confirmit user. Check this box if you wish to allow the reviewer to make changes to the answers and scales. If you leave the box un-checked, then the reviewer will not be able to see the answers and scales so will not be able to change them.

3. Check and edit as appropriate the email address to which the status email is to be sent when the reviewer has completed his/her job.
4. Check the Display answers and scales box if necessary.
5. Click **Save settings** to save the changes.

7.14.2. How to Set up and Send the Review Email

When your survey is ready to be sent to the reviewer(s), you need to set up the email containing the link to the survey.

1. Go to the **Designer > Questionnaire Reviewer > Emailing** menu command.

   The Questionnaire reviewer - Emailing overlay opens. Use this dialog to set up the email that is to be sent to the reviewer(s).

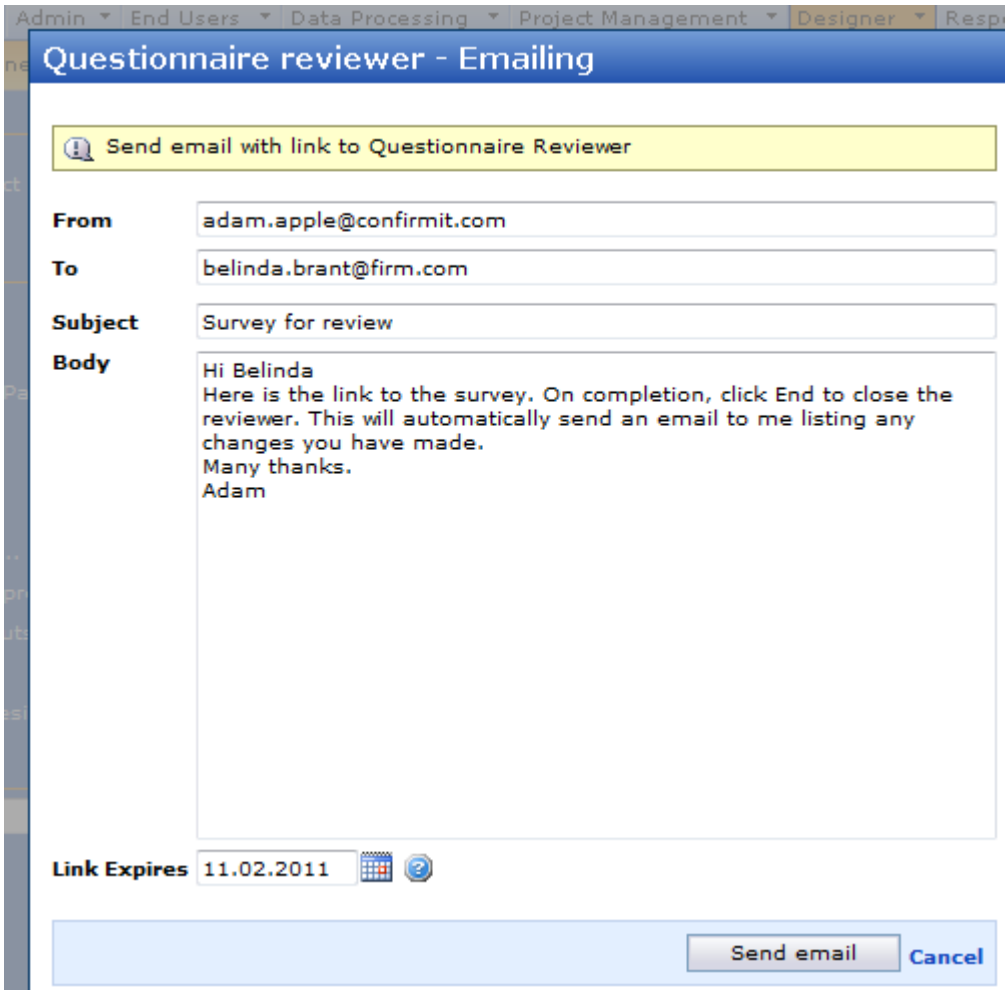


Figure 346 The Send Email... dialog

The fields are as follows:

- **From –** the email address from which the email will be sent (your email address).
- **To –** the email address or addresses to which the email with the link to the survey is to be sent. In the event you have more than one reviewer, separate the addresses with a semi-colon.
- **Subject –** the email subject.
- **Body –** the main body text of the email.
- **Link Expires –** the link to the editing interface has a limited life (you will not want a reviewer to make changes once the survey has gone live). Click the button beside the field to open a calendar, then select the required expiry date for the link. The default maximum is 14 days, though this can be configured by the system administrator.

2. Type in the text and make the settings as appropriate, then click **Send email**.

7.14.3. The Questionnaire Reviewer Window

When the reviewer clicks the link he/she has received from you, the Confirmit Questionnaire Reviewer window opens.

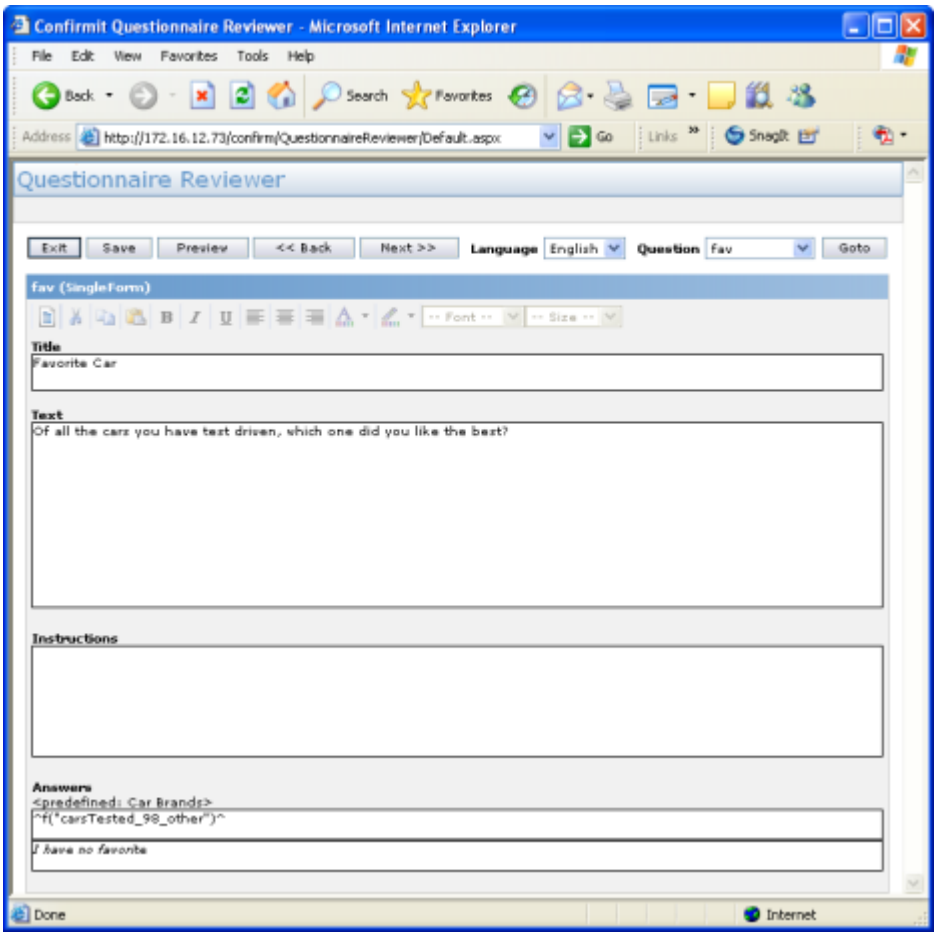


Figure 347 Example of the Confirmit Questionnaire Reviewer window

The reviewer navigates through the questionnaire by clicking the **Next** and **Back** buttons, they select the language they need to work in via the Language drop-down, and they can jump to specific questions by selecting the target in the Question drop-down and clicking **Goto**. The reviewer can save his/her work when they wish, and preview the questions. On completion they click **Exit** to close the window and send a status email to the address specified (see How to Set up the Questionnaire Reviewer on page 330 for more information).

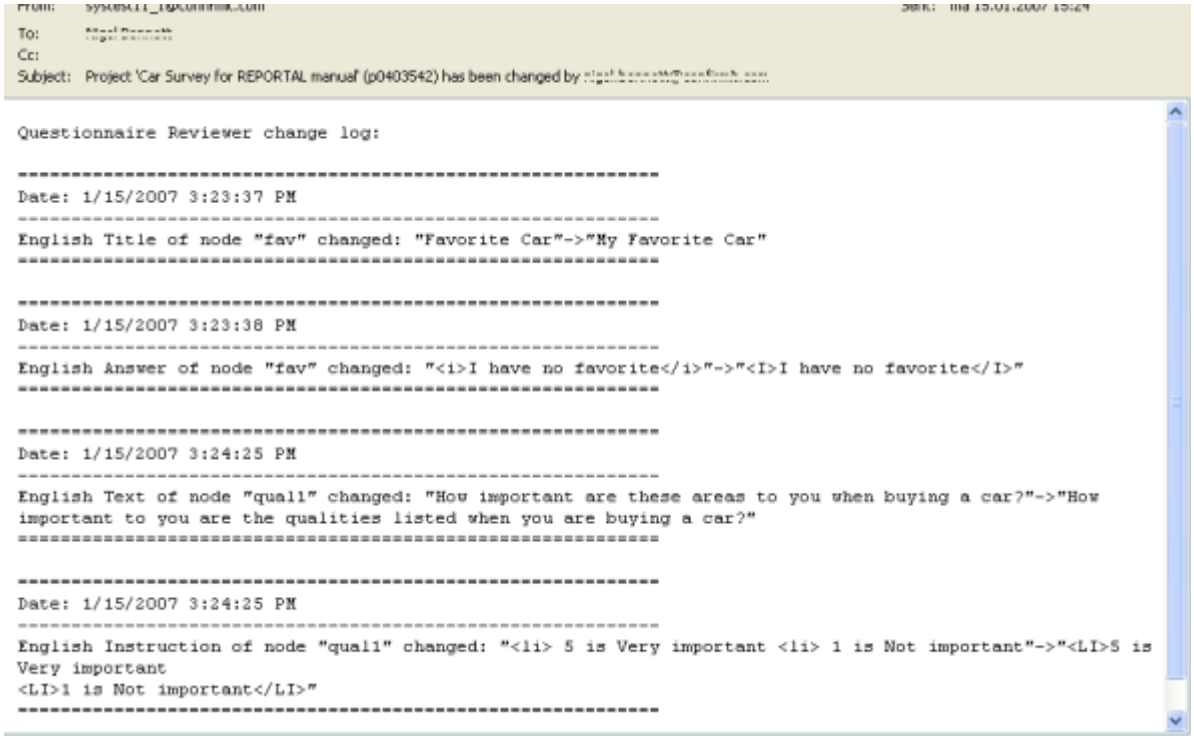


Figure 348 Example of a status email returned from a reviewer

The recipient of the status email can then check the changes that have been made.

8. Poll Surveys

Polls are "limited" surveys that allow only one question, and a chart (on in its own page) (see The Chart Object on page 311 for more information) to present the results. Polls make use of the Inline Survey functionality (see The Inline Survey Options on page 507 for more information) so you can locate them within other web pages. You can place multiple polls on the same web page, but each poll can be answered only once from the same pc (see the Note below).

Polls are stored in Optimized database format, in a shared database for the company. That is, all polls for one company are stored in the same database.

Note: When a poll is responded to, a cookie is set in the respondent's pc. Any further attempts to respond to that poll from that pc will result in the poll going directly to the chart; the respondent cannot reply to a poll more than once from the same pc.

8.1. How to Create a Poll

To create a new poll survey:

1. In the **Home** menu, click **New > Poll**.

   The New Poll overlay opens. Note that the preview appears once a survey layout is selected.

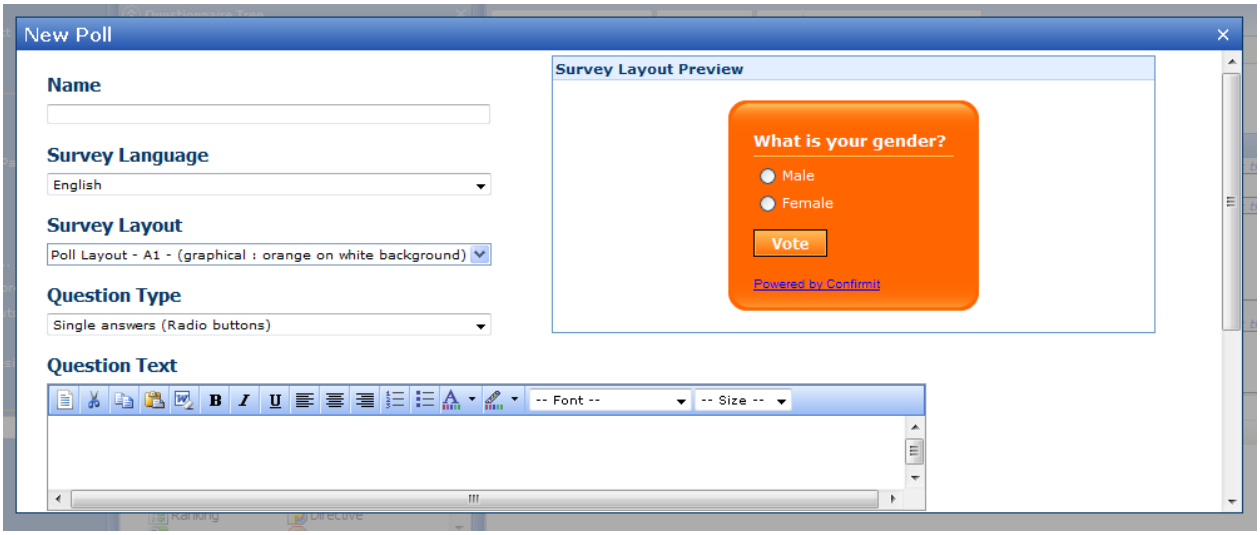


Figure 349 Example of the New Poll page

2. Type a name for your new poll into the Name field.
3. Select the language to be used for your poll.
4. Click the down-arrow beside the Survey Layout field and select the survey layout you wish to use (see Survey Layouts on page 65 for more information).

   An preview example of the layout is presented towards the right side of the page.
5. Click the down-arrow beside the Question Type field and select the type of question you wish to use.

   The Answer Text field will change depending on the type of question you select.
6. Type the question text into the field and format it as required using the tools in the text toolbar above the field.
7. Scroll down to the bottom of the overlay and fill in the answers as appropriate for the type of question you have selected to use.

8. Select the remaining options as required.
9. Click **Create Poll** to create the poll.

   The poll is now listed in the Poll List and the Question Details page opens. Here you can set up the poll and adjust its properties as required. The properties available are the same as those for "standard" surveys (see Question Properties on page 251 for more information). Note however that several options are disabled for Poll surveys - you cannot for example add new questions, delete questions etc.

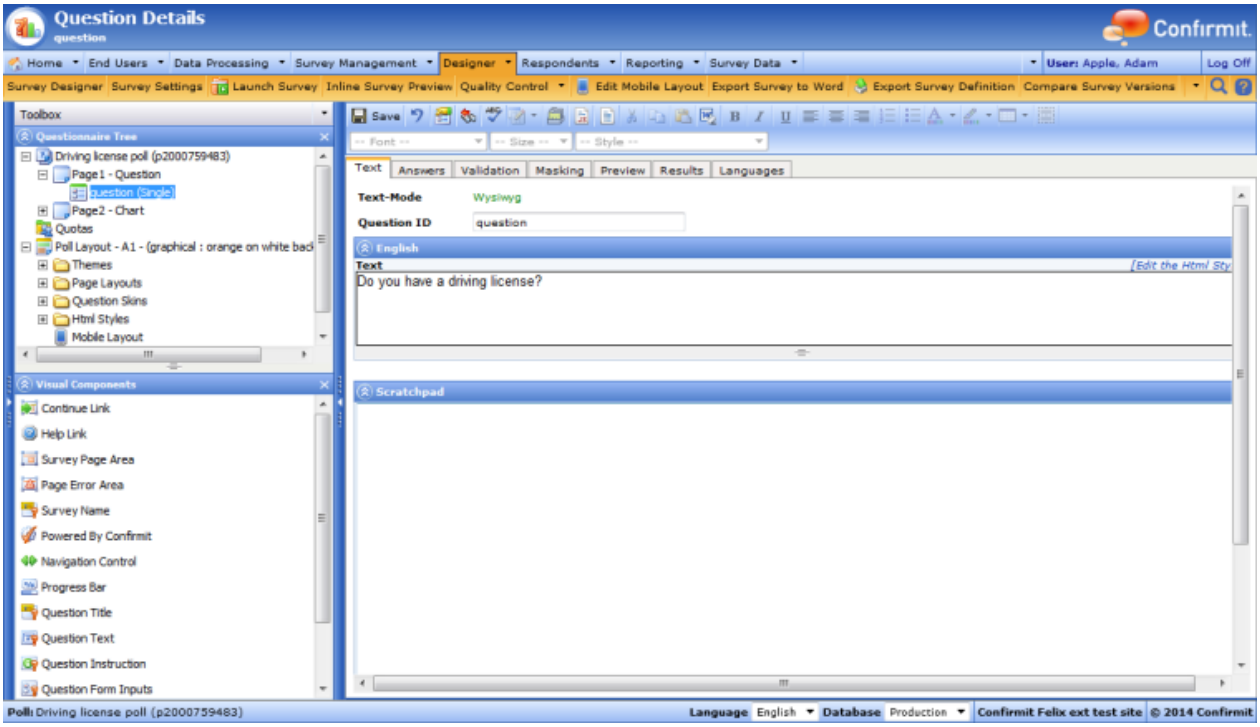


Figure 350 Example of the Question Details page for a Poll

Note: If you have the Professional Panel functionality, you can link Polls to a Panel and embed the panel in your Panel Portal. To do this, if you have created your Poll using the New Poll wizard, you can go back to the Survey Overview page before you launch the Poll to set up a link to the Panel. This will automatically add "panelistid" to the survey

Note that the chart object (see The Chart Object on page 311 for more information) is placed onto a separate page. This is so that when the respondent has answered the question and clicks **Next**, the chart then appears displaying all the responses to-date.

Double-click on the chart object in the Questionnaire Tree to open the Question Details page for the chart. Here you can select the chart engine and type of chart to be used, and see a preview created using your selected settings and populated with some pseudo-random data.

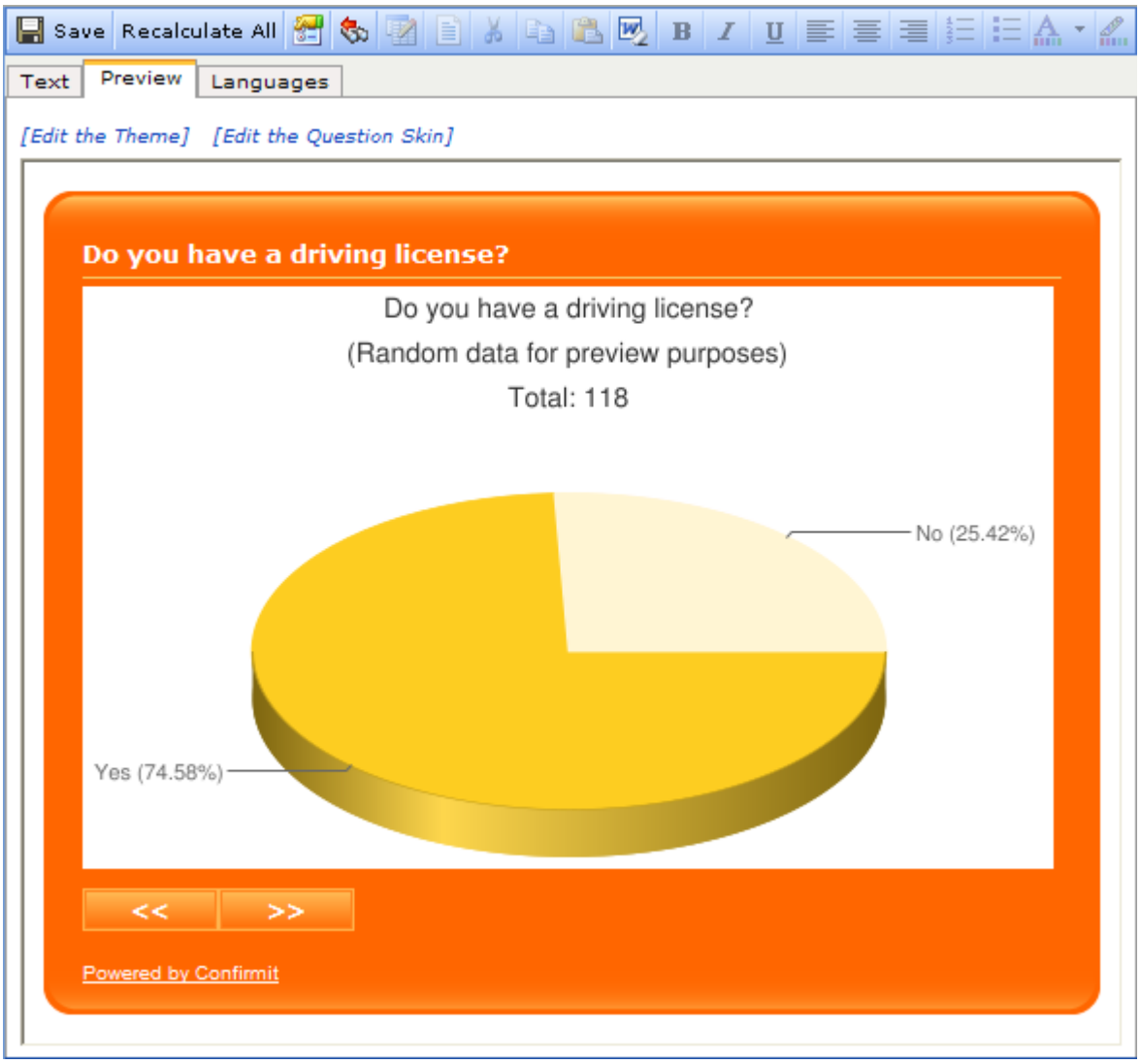


Figure 351 Example of the Chart Preview using random data

Once you have set up the chart as required, save the changes and launch the survey as normal (see Generating the Response Databases - Launching on page 525 for more information).

9. Genius

The Genius™ application is a Confirmit add-on and subject to licensing fees.

Important
This functionality is only available for SaaS customers.

Confirmit Genius Text Analytics is a text analytics application that analyzes text responses to survey questions, groups them according to subject, and grades them on a 5-point scale (-2 to 0 to +2) according to how positive or negative the respondent is to the subject of the question.

For example, a shop could ask customers what they thought of the service they received while making their most recent purchase, and a respondent's comment could read: "Your employees were very knowledgeable and helpful, but the floor was dirty and the shop was rather untidy." After processing by Genius, the result could be that Staff knowledge is graded at +2 and Staff helpfulness at +1, while Cleanliness is graded at -2 and Tidiness at -1.

Your survey can contain as many questions of as many different types as you wish (within system limits). However text analysis can only be performed on open text questions.

The text analysis is based on a categorization model. Different techniques are available for helping you to build your categorization model, using advanced Boolean expressions, Concept Miner tags or a combination of both. This model must be created, and must contain all the key-words and tags that are to be searched for in the responses and graded during the analysis.

To create your categorization model you need access to Model Builder, which is our self-service tool for understanding your verbatim and for creating the model. Concept Miner is a topic extraction tool that uses AI to analyze your data and extract the relevant topics. These topics can then be used to create tags, which can be brought into your categorization model for quick and easy model building.

Model Builder is subject to per user licensing fees and has separate documentation.

9.1. How it Works

The Confirmit Genius Text Analytics add-on allows categorization and sentiment analysis of free-form text (open text responses).

In order to set up Text Analytics, you will need to have a categorization model that has been built for your business and which is specific to your verbatim set. Depending on your situation, you would fall into one of the following groups:

- You already have a categorization model from a different vendor – we are able to import your model into Model Builder (our end user model categorization management tool).
- You have the outline of a categorization model from manual categorization or coding work.
- You do not have a model, but your business falls into a generic model vertical that Confirmit has already created.

We will go through each of these groups in more detail in the next section.

Once you have your categorization model, the Confirmit Genius Text Analytics folder must be added into your survey, linked to the model and sentiment scale and the Horizons task scheduler set up to run at regular intervals. Confirmit Genius Text Analytics is tightly integrated with Horizons, so that any new verbatims that come in through the survey responses are sent across to Genius for categorization and sentiment. These are stored within the Genius folders so that the reporting modules can use them for reporting and dashboards.

Note: If you want to avoid personal data / personal identifiable information being included in the Verbatim, Confirmit recommends that you add an instruction in the open text question(s) along the lines of the following: “When providing your response, please do not include any personal identifiable information".

9.1.1. The Categorization Model

The first step to getting Text Analytics working for your project is a categorization model that fits your business and your survey verbatims. Confirmit offers a managed or a self-service approach to setting up your model, or a combination of the two.

1. **An existing model is imported:** We are able to import models from other vendors into Model Builder. Note that if your model contains some vendor-specific syntax, this will need to be removed before being imported into Model Builder, and this may give you some different results. Missing syntax can be addressed through Concept Miner tags or by additional work with Boolean expressions. Our Analytics team can perform this work (which would be outlined in a Statement of Work) or customers can be trained to make updates to their model in Model Builder (this requires an Analyst who understands modeling data).
2. **You provide an outline of a categorization model:** If you have an outline of a categorization model that has been used for manual categorization or coding, this can provide a good starting point. The Confirmit Analytics team can provide you with guidelines for creating your model, to ensure you're getting the actionable insights that you need from your text analytics solution. This model is then created in Model Builder using Concept Miner tags, Boolean queries or a combination of the two..
3. **You use a generic model:** Confirmit has a number of generic models that have been created by the Analytics team, which can be used as a starting point. These models will need to be adjusted so that they become fit for purpose for your business and for your survey verbatim.
4. **You do not have a model:** If you have none of the above, you can still get started quickly and easily through analysis of your data by Concept Miner and then creation of your model using Concept Miner tags and Boolean queries.

9.1.2. The Model Template

Category	Sub-category	Attributes		Category	Sub-category	Attributes
Billing				Staff		
	Layaway				Manager	
	Payment Methods					Appearance
	Receipt					Attitude
Experience						Communication Skills
	Ease of					Helpfulness
	Finding help					Knowledge
	Finding Items					Language
	Navigation					Speed of Service
	Quality of Service				Associate	
	Speed of Service					Appearance
	Staff Availability					Attitude
	Wait Time					Communication Skills
Look and feel						Helpfulness
	Store					Knowledge
		Atmosphere				Language
		Cleanliness				Speed of Service
		Condition		Policy	Exchanges	
		Design			Fees	
		Greeting			Financing	
		Heating and Cooling			Refunds	
		Layout			Returns	
		Lighting			Warranty	
		Noise				
		Odor				
		Display				
		Size				

Figure 352 Example of a template for a particular type of survey

9.1.3. Sentiment Analysis

Sentiment analysis is performed using Deep Learning neural network techniques, which learn the domain of your text in order to provide more accurate sentiment analysis. This sentiment configuration provides sentiment on a 5-point scale. It cannot be tuned at present, but generally provides good results out of the box.

We have another sentiment configuration which uses probabilistic scoring for determining sentiment. This works on an 11-point scale (-5 to +5). Sentiment tuning can be performed on this configuration to ensure that the sentiment analysis takes into account your business's nuances (for example, "outstanding" could be interpreted as 'excellent' or 'not yet resolved' depending on the type of business), how your customers talk (formal vs informal) etc.

Our sentiment configurations are currently in English and Italian. We also have the ability to send other language comments to Google Translate to translate the verbatims into English for analysis using our English sentiment engine. Speak to your Account Manager if this is of interest.

9.1.4. Integrating with Horizons

Once the model has been built, your survey responses can be analyzed.

When you run Genius Text Analytics (see Running the Genius Task on page 351 for more information), a task submits verbatim texts from the Confirmit survey to Genius. The texts are processed through the Concept Miner categorizer and the sentiment agent, and the analyzed data is returned and stored in the survey database. Overall sentiment, category hits and category sentiments are stored into regular variables in the survey, making them available for reporting and analysis. These variables must be set up in the survey prior to the analysis, for each verbatim question for which the answers are to be processed .

Once the responses have been analyzed and you wish to present the data in your report, bear in mind that text analytics deals with multidimensional data; categories mentioned and their individual sentiments. The challenge here is to present the multidimensional data in a way that:

- Is easy to comprehend at a glance.
- Draws attention to the areas that need changing, where many people have negative experiences.
- Avoids real issues becoming hidden behind averages.

For example, say we have a survey with 1000 responses. 400 of the responses talk about employee attitude, with only 25% (100) of those statements being negative. This then makes the Average sentiment for attitude very positive. If 50 of the responses talk about store layout with 80% (40) of those statements being negative, then the average sentiment for layout is very negative. If we then report based on average sentiment, we will fail to notice we have 100 customers (10%) that have negative experiences with employee attitude, and rather focus on improving store layout because of the 40 customers (4%) that have negative experiences with that.

Also, overall sentiment has a tendency to end up as neutral because people often mention both positive and negative things in the same sentence, for example, "The service was good but the shop was untidy". This is where category sentiment becomes important.

It is also important to think about how you are asking your question. The survey question should be neutral, such as "Please would you tell us more" or "Please let us know your thoughts about your experience". This way, respondents will write sentences that contain sentiment that can be analyzed.

If you ask a question that is already loaded with sentiment (for example "What did you like about your experience in the store?", the sentiment engine will not be able to provide accurate sentiment as the respondent is likely to reply with a neutral verbatim.

These points must be considered when creating the reports.

9.2. Setting Up Genius Text Analytics

Important
The survey to be used for text analytics processing must be set up carefully and the folder and variable names must be correct otherwise the text analytics task will fail. Note that the variables are case-sensitive.

There are two ways of setting up variables for text analytics in the survey. Either you can have a separate loop structure for each question, which our Reportal text analytics templates are based on, or you can combine results from several open text questions run against the same categorization model into one loop structure, allowing you to look at results across all the questions in reporting. Studio supports reporting on both of these methods of setting up the text analytics variables. You can use either of those two variants, or both, in the same survey. The text analytics task will automatically use the loop variant(s) that are in the survey provided they have been set up correctly. If you set up both variants in the same survey, they can both refer to the same lookup table for the categorization model.

This guide will first explain the setup that is common regardless of which of these loop structures you choose to use, and then outline the two different loop structures that are supported.

9.2.1. Creating the Sentiment Scale

You perform text analysis to discover your respondents' feelings or sentiments concerning your product or service. The table uses a reusable 11-point scale, so the codes are 1 through to 11. Create the scale in the Reusable scale/list folder and call the scale **SentimentScale**.

Confirmit recommends that the reporting is set up using a 3-point scale (-5 to -1 = Negative, 0 = Neutral and 1 to 5 =Positive) or a 5-point scale (-5 to -3 = Negative, -2 to -1 = Slightly Negative, 0 = Neutral, 1 to 2 = Slightly Positive and 3 to 5 = Positive). This is set up in the report configuration.

You can set up the sentiment scale for both of the sentiment configurations (see Sentiment Analysis on page 339 for more information) in the same way. The older sentiment configuration will give you scores for all 11 codes (i.e. from -5 through 0 to +5). The newer Deep Learning configuration will only give results at -5, -3, 0, +3 and +5, as this works on a 5-point scale. We recommend trying the Deep Learning configuration first and only going to the original sentiment configuration if your results are not good enough.

Tip
If the question you are analyzing contains sentiment (for example "What do you like about our company?" or "What went wrong with your transaction?"), the sentiment will not work well for your comments. To achieve more accurate sentiment results, questions should be neutral (for example "Tell us why you gave us that score").

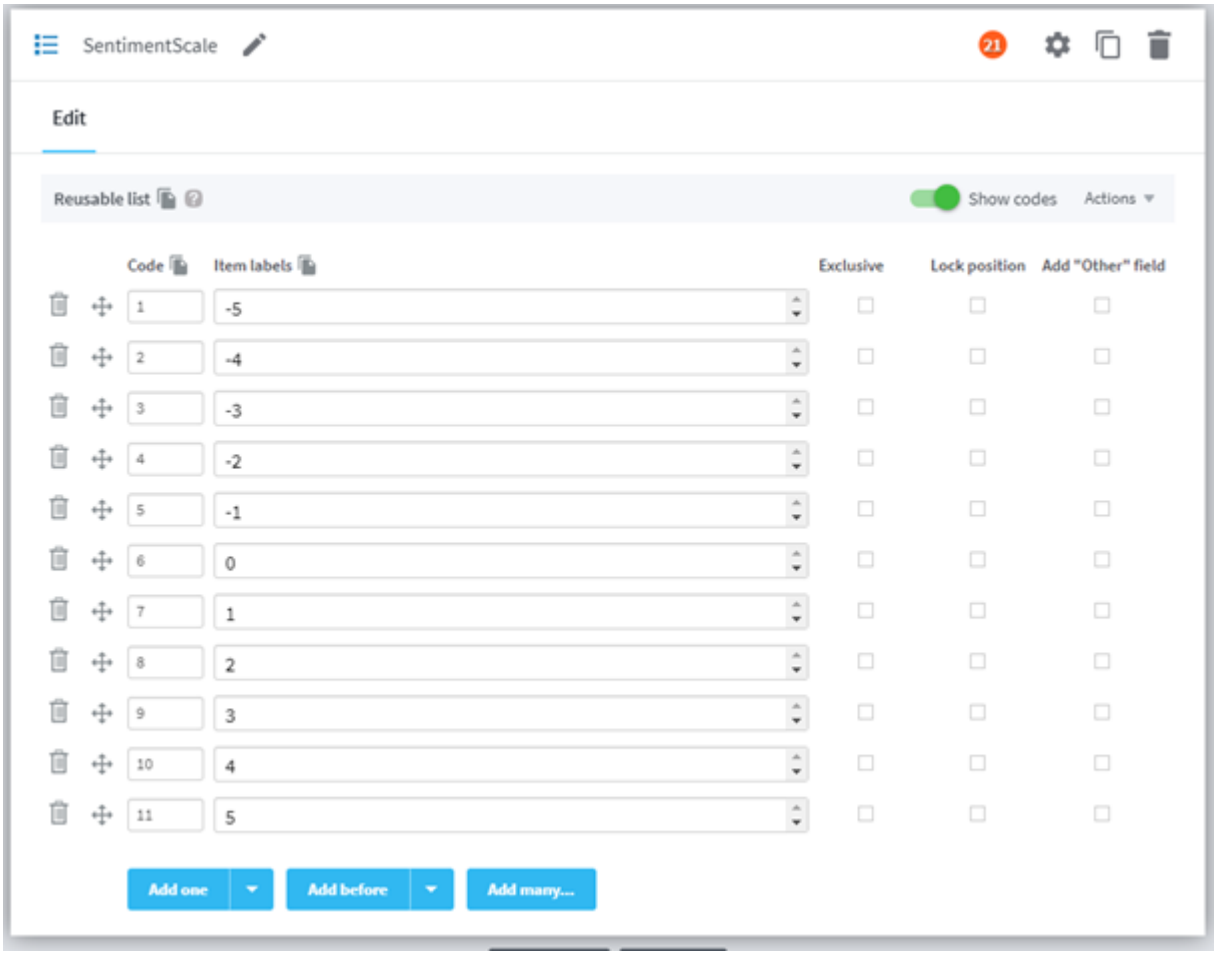


Figure 353 The SentimentScale reusable scale

This SentimentScale reusable list will be used as the answer list in the OverallSentiment (Single) variable and the Category/Sentiment (single) variable in the LoopReference variable .

9.2.2. Creating the Categorization Model Reference List

The structure of the categorization model must be set up in a self-referencing hierarchy table (in Database Designer). The hierarchical model can contain categories, sub-categories and attributes, and the table must contain the category, sub-category and attribute names along with their IDs. These must have a **c** prefix for categories and sub-categories and an **a** prefix for attributes. The IDs that are passed back from Genius can then be identified when setting up your dashboards.

Confirmit Model Builder is the end user tool that you use to set up and maintain your categorization model. The category IDs can be found in this interface.

Note: Anyone who has permission to launch the survey will need to have Delete/administrator rights to the Schema in Database designer. They will also need to have access to the Survey in the Smarthub.

1. A preconstructed list of categories, sub-categories and attributes, and their corresponding IDs is available. To copy this, go to the Model List page in Model Builder and click on the cogwheel icon to open the drop down list of options (this is also available from the cogwheel icon next to the model name in the 'Design' mode). Click on **Category list** from the cogwheel on the Model list page or the **Get categories and attributes** link on the Model Overview page to open a dialogue box with the category and attribute list and IDs. You will only see a categories list if you have an active version of the model.

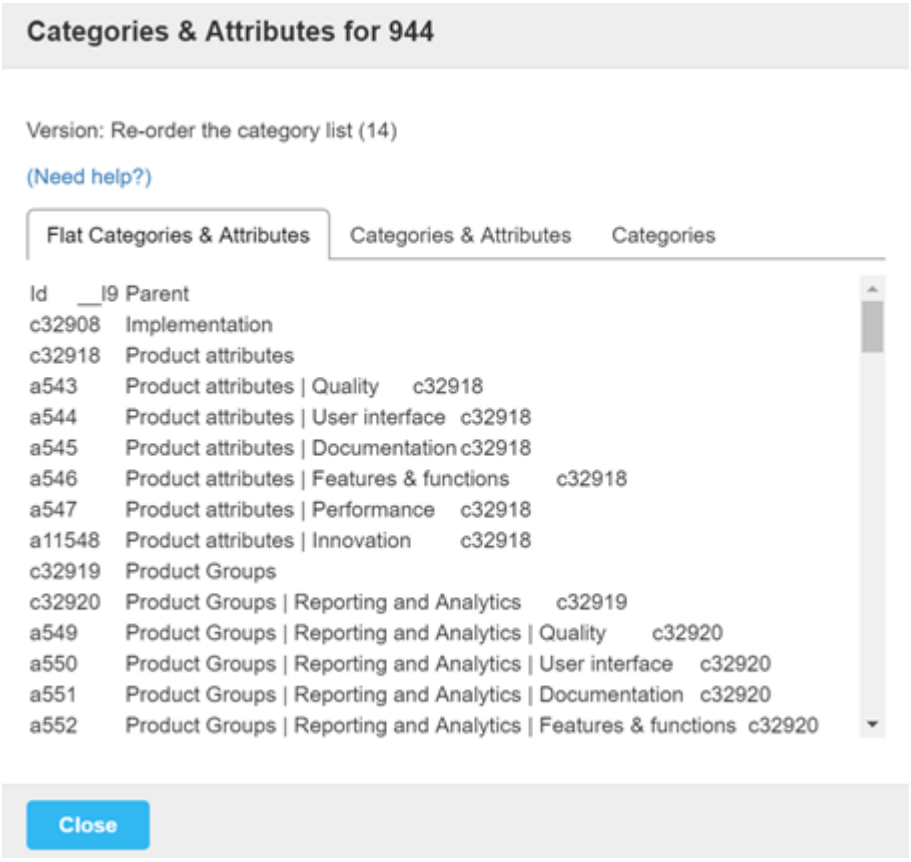


Figure 354 Copying the Category List

2. Choose which category list is the correct one for your project.

- The **Flat Categories and Attributes** tab must be used if you have a hierarchical model and you want to view your Text Analytics data in the Reportal Text Analytics standard template report. There are pipe characters between the names of categories, sub-categories and attributes, which will show up to give context in the charts of the report. The report also splits up the names at the pipe character to show the hierarchical model correctly.
- The **Categories and Attributes** tab must be used if you are using Studio and the Discovery Analytics Text Analytics widget for reporting. This is also used if you have a report that does not use the Text Analytics standard template report.
- The **Categories** tab is a legacy tab – only used by customers who are using a flat model and who have not yet moved across to the newer methods. This option will be removed once all customers have been migrated off it, so do not choose this tab.

3. Choose the correct tab, select the full text and use Ctrl-C to copy the list to your clipboard.

Tip
If you go directly into text file format, you will need to add a tab next to the 'Parent' header before saving.

4. Paste this list into an Excel® spreadsheet.
5. Save this spreadsheet as a Unicode Text file (this ensures compatibility when using languages other than English).
6. Go into Database Designer, create a schema and select the Hierarchy wizard.

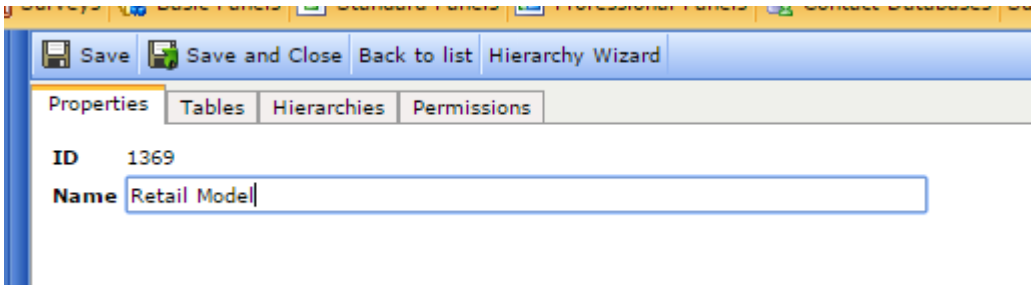


Figure 355 The Hierarchy wizard

7. Select **Self-referencing hierarchy**.

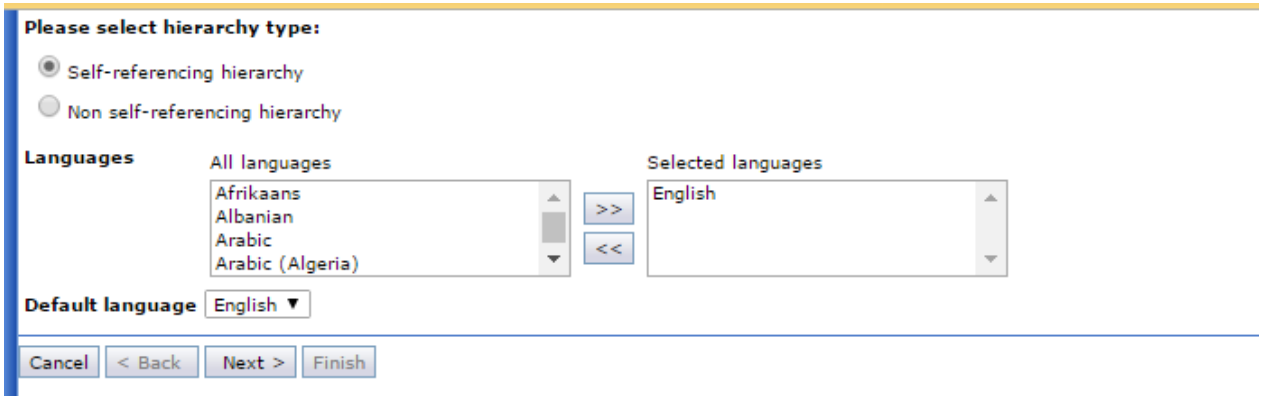


Figure 356 Selecting Self-referencing hierarchy

8. Then click **Next**.
9. Add the name of your table.

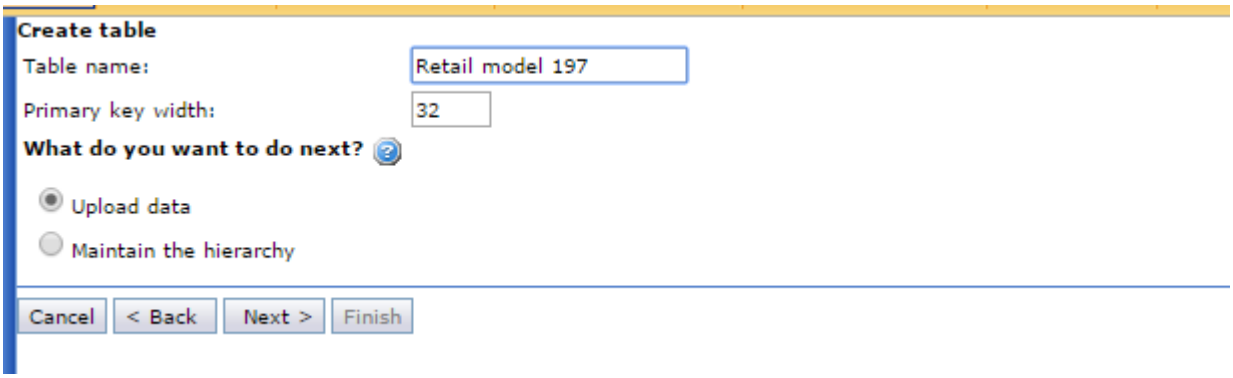


Figure 357 Adding the name of your table

10. Then click **Next**.
11. Choose your tab delimited text file and ensure the category labels are correct.

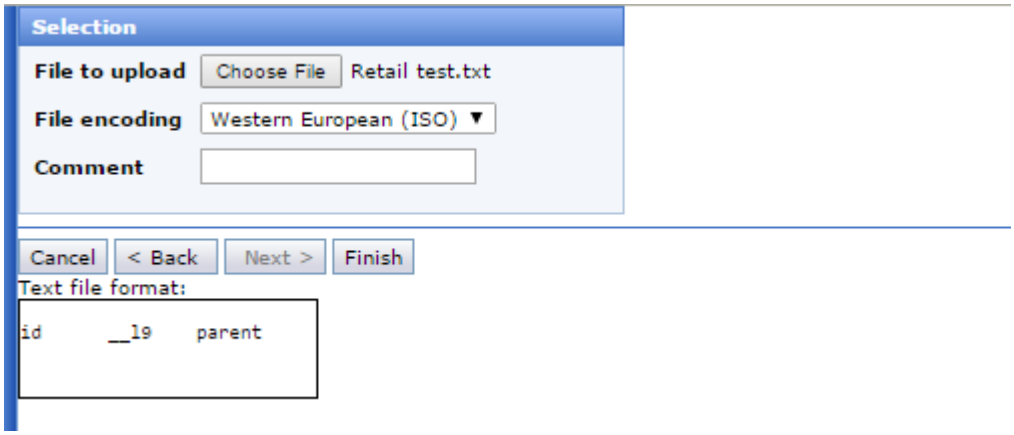


Figure 358 Choosing the file

12. Click **Finish**.

    Once the table has been created it is ready to use.

Note: If the model is edited after the table has been created, then the table will need to be updated with any new categories, sub-categories and attributes that are added. If the model has only acquired new keywords in existing categories, this is not necessary.
A new feature now exists which automatically synchronizes the database designer table with the newly added structure of the category tree **(see Running the Genius Task on page 351 for more information).**

9.2.3. Text Analytics Metadata (Time Stamps)

1. Create a folder for the metadata and name the folder **MetaData – question id**.
2. In this Metadata folder, create a Date object and name it **<qid><model nr.>PushedDate**.

   Once the analysis is run, this will hold the date and time the data was sent to be analyzed.
3. Also in the Metadata folder, create a Date object and name it **<qid><model nr.>ProcessedDate**.

Once the analysis is run, this will hold the date and time the data was processed and returned.

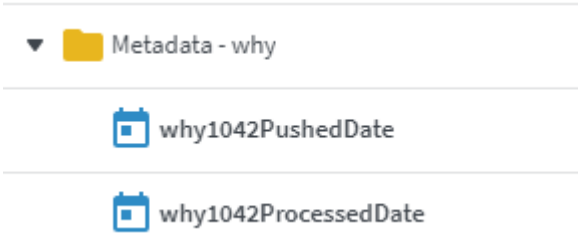


Figure 359 Example of Text Analytics Meta Data

9.2.4. Setting Up Text Analytics Variables with One Loop for each Variable

For each question in the survey that is to be analyzed using Genius, a loop variable containing a set of single, multi and grid variables, and a metadata folder containing a PushedDate and a ProcessedDate variable, must be created.

Note: In the survey on which you wish to run text analytics, ensure the following:

- English (a non-country-specific version) must be set as one of the languages for the survey, otherwise when reporting, the categories might be displayed blank.

- You cannot have an underscore (_) in the name of a Qid that is to be used for Text Analytics. If you must use Text Analytics on a Qid that includes an underscore in its name, you must set up a Data Processing rule to pull these comments into a new Qid that does not have an underscore.

1. If you do not have access to the Text Analysis functionality, contact Confirmit Support and ask them to enable the Text Analytics permissions.
2. Once you have access to the functionality, log in to Authoring and select the survey to which you want to add the Text Analytics module.
3. Create the reusable scale for sentiment (see Creating the Sentiment Scale on page 341 for more information).
4. Add the categorization model list (the Database Designer table).
5. Add a folder for the metadata (see Text Analytics Metadata (Time Stamps) on page 344 for more information).
6. Create the variables in the survey.
7. When you have added the loop and metadata folder as described, launch the survey.
8. Run the Genius task .

If everything is set up correctly, the task will run. The data will be transferred to Genius, it will be processed, and the results will be transferred back to the Confirmit survey.

Tip: If you have a previous example of the Text Analytics folder in another project, go to that project in the secondary tab and copy the full folder (i.e. loopreference and the meta data folder) into the current project. Make sure that you rename all variables and set up the database designer tables correctly and in full before launching the survey.

For each open text question that is to be analyzed, there must exist in your survey a specific set of folders and variables to receive the processed data. Note that these variables must be set as Hidden so they are not displayed to the respondents. The setup procedure below describes only the open text question and the folders and variables required for the analysis functionality.

Important!
The variables must be set as Hidden Variables.

Note: The qid must not include the underscore character (_) because multis using loop reference answer lists cannot use qids with that character.

For each of the open text questions you want to run text analytics on, you have to do the following:

1. Create a folder for the model and name the folder **<qid> - <TextAnalytics> - <Model no.>**.

Note that a new folder with the required loop object and variables will be required for each model.

2. In the folder you have just created, create a single variable and name it **<qid><model no>HierarchyReference**. In its properties, set Answers to **Hierarchy lookup** and Variable type to **Hidden**.

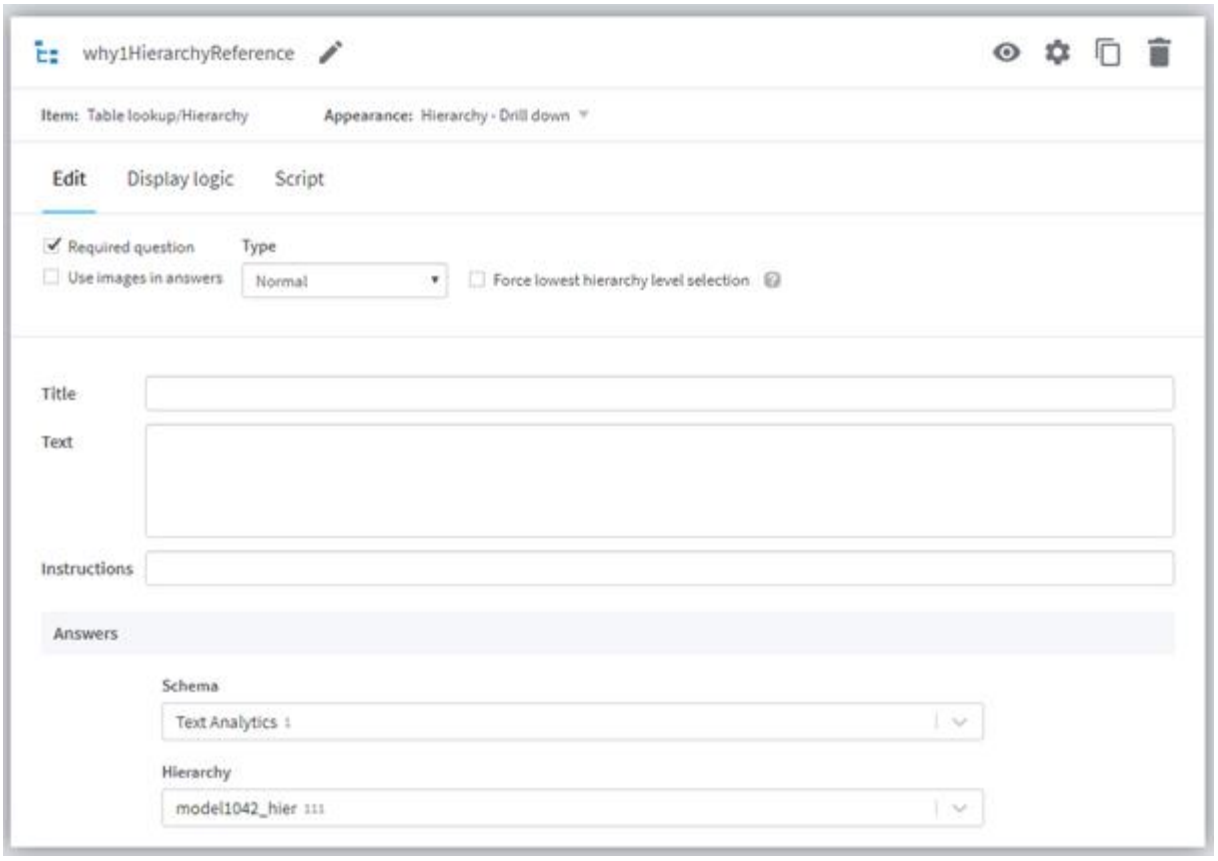


Figure 360 Example of the Hierarchy question

3. In the Answers tab, set the Schema name and Table to be the schema name and table of your categorization model that you have set up in Database Designer. Note that you should use the 2nd tab 'Categories and Attributes' model for the HierarchyReference variable, as this will enable you to use the Discovery Analytics widget for Text Analytics.
4. Create a loop object and name the loop **<qid><model nr.>CategoriesLoopReference**. The Loop Object is used as the answer list in the multi variables, allowing the table lookup to be used in the multis. Open the Properties for the object and set the type to **Table Lookup**, and set the schema and table you want to use.

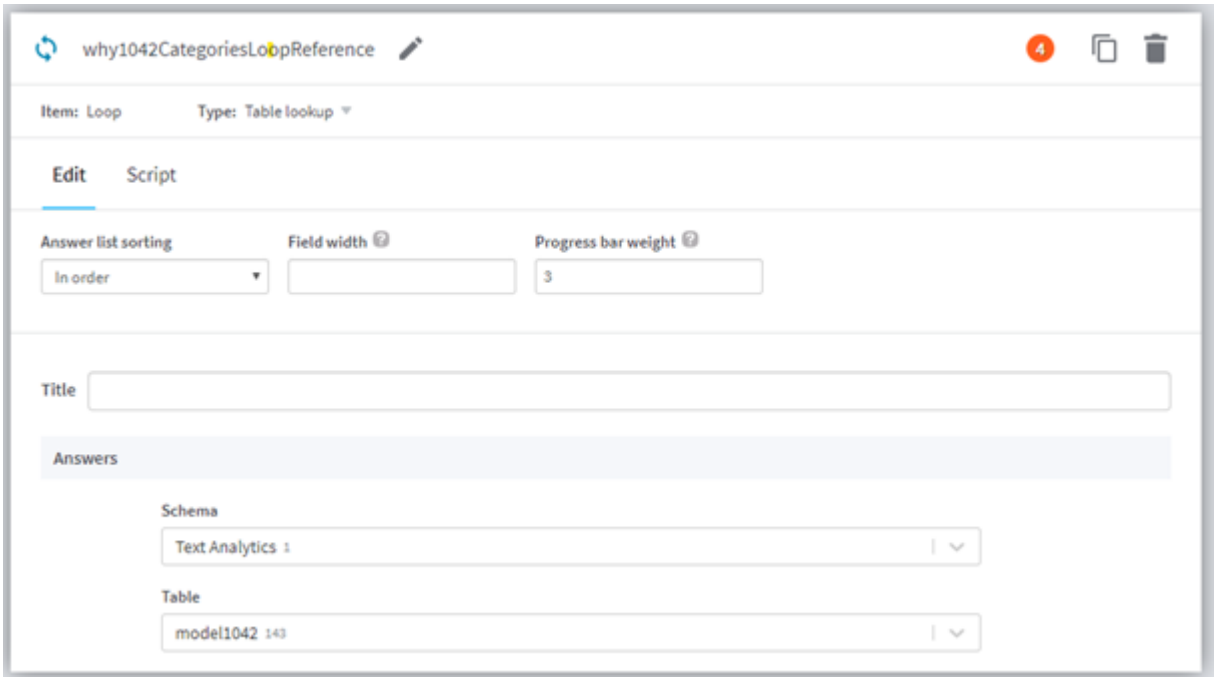


Figure 361 Setting the Loop properties

5. Create a Single variable and name it **<qid><model nr.>OverallSentiment**. Set it to Hidden, and specify the SentimentScale reusable answerlist as its answer list (see Creating the Sentiment Scale on page 341 for more information).
6. If reporting in Reportal or Discovery Analytics:
   - Create a Multi variable and name it **<qid><model nr.>Categories**, and in this variable's Answers tab click Add Loop Reference and specify the loop as its answer list.
   - Create a Multi variable and name it **<qid><model nr.>PositiveMentions**, and in this variable's Answers tab click Add Loop Reference and specify the loop as its answer list.
   - Create a Multi variable and name it **<qid><model nr.>NegativeMentions**, and in this variable's Answers tab click Add Loop Reference and specify the loop as its answer list.
   - Create a Grid variable and name it **<qid><model nr.>CategorySentiment**. In this variable's Answers tab click Add Loop Reference and specify the loop as its answer list, and in its Scale tab, specify the 11-point SentimentScale reusable scale/list (see Creating the Sentiment Scale on page 341 for more information).
7. If reporting is to be done in Studio, create three single, Boolean variables **<qid><model nr.>CategoriesSec**, **<qid><model nr.>PositiveMentionsSec** and **<qid><model nr.>NegativeMentionsSec** with answers **true** and **false**, and a single variable **<qid><model nr.>CategorySentimentSec** with the SentimentScale reusable scale/list (see Creating the Sentiment Scale on page 341 for more information).

If setting up both for Reportal/Discovery Analytics and Studio, the Questionnaire Tree should look as in the example below, with the Open text question **why** and the folder **why - TextAnalytics - Model 1042** with its loop object and variables. You can drop the variables specific to Reportal/Discovery Analytics if reporting in Studio only, and vice versa.

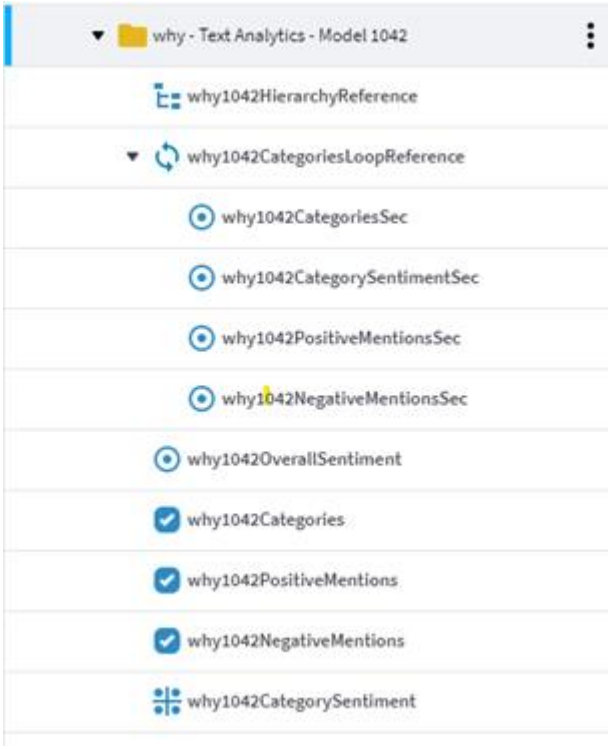


Figure 362 Example of the questionnaire set up for processing

Note: You can also copy a folder from an existing project that has the Text Analytics Loopreference already setup. Be aware that if you do this you cannot launch the survey until after you have changed the loopreference name; problems will arise if you attempt to launch before you have made the changes.

Only launch the survey after you have set everything up properly. Ensure that the name of the loopreference has the name of the open end comment that you're analyzing, spelled and written EXACTLY the same. Note that it is case sensitive – it must be identical, then the model ID number and the rest of the name CategoriesLoopReference.

If you have copied from another survey, remember to ensure that you have referenced the correct Table Lookup and that you have renamed each of the variables correctly, including the Meta data folders.

9.2.5. Setting Up Text Analytics with One Combined Loop Structure (Studio)

Instead of creating separate loops for the text analytics variables for each open text question, it is possible to place all questions that are coded with the same categorization model in the same loop structure, with an outer loop iterating over the opentext questions used. The benefit of this setup is that you can then easily combine results across all questions when reporting in Studio. For all the questions in the survey that is to be analyzed using a common categorization model in Genius.

Note: In the survey on which you wish to run text analytics, ensure the following:
- English (a non-country-specific version) must be set as one of the languages for the survey, otherwise when reporting, the categories might be displayed blank.
- You cannot have an underscore (_) in the name of a Qid that is to be used for Text Analytics. If you must use Text Analytics on a Qid that includes an underscore in its name, you must set up a Data Processing rule to pull these comments into a new Qid that does not have an underscore.

1. If you do not have access to the Text Analysis functionality, contact Confirmit Support and ask them to enable the Text Analytics permissions.
2. Once you have access to the functionality, log in to Authoring and select the survey to which you want to add the Text Analytics module.
3. Create a folder and call it **Results**.

4. Create the reusable scale for sentiment (see Creating the Sentiment Scale on page 341 for more information).
5. Add the categorization model list (the Database Designer table).
6. Add a folder for the metadata (see Text Analytics Metadata (Time Stamps) on page 344 for more information).
7. Create the variables in the survey.
8. When you have added the loop and metadata folder as described, launch the survey.
9. Run the Genius task .

If everything is set up correctly, the task will run. The data will be transferred to Genius, it will be processed, and the results will be transferred back to the Confirmit survey.

Tip: If you have a previous example of the Text Analytics folder in another project, go to that project in the secondary tab and copy the full folder (i.e. loopreference and the meta data folder) into the current project. Make sure that you rename all variables and set up the database designer tables correctly and in full before launching the survey.

For each of the models you are running text analytics against in your survey (typically one), you must do the following:

1. Create an outer loop called **Model<modelid>Questions** (for example Model1042Questions), which has one iteration for each opentext question, with question text as label and question id as code, for example:

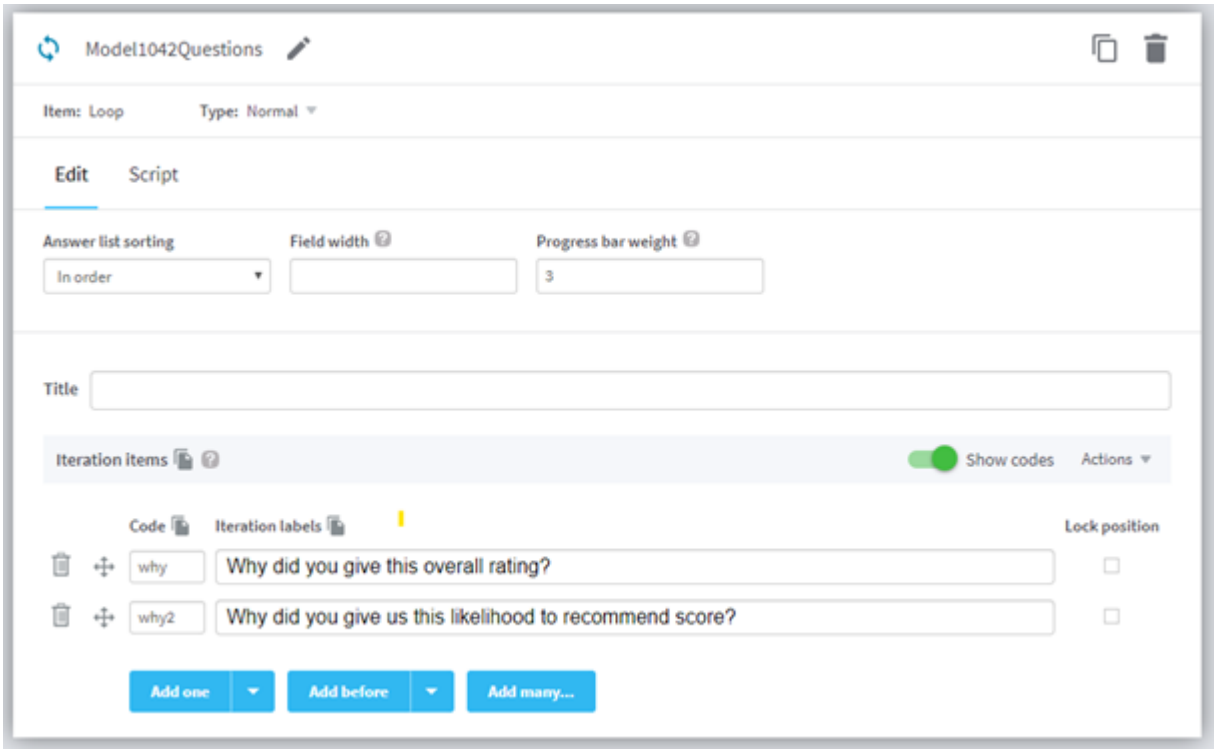


Figure 363 Example of the outer loop iterating over the open text questions

2. Create a Single variable and name it **Model<model nr.>OverallSentiment**. Set it to **Hidden**, and specify the SentimentScale reusable answerlist as its answer list (see Creating the Sentiment Scale on page 341 for more information).
3. Create an OpenText variable and name it **Model<model nr>Verbatim**. This will hold a copy of the verbatim response from the opentext question.
4. Create a loop object and name the loop **Model<model nr.>CategoriesLoop**. The Loop Object is used as the answer list in the multi variables, allowing the table lookup to be used in the multis.
5. Open the Properties for the object and set the type to **Table Lookup**, and set the right schema and table.

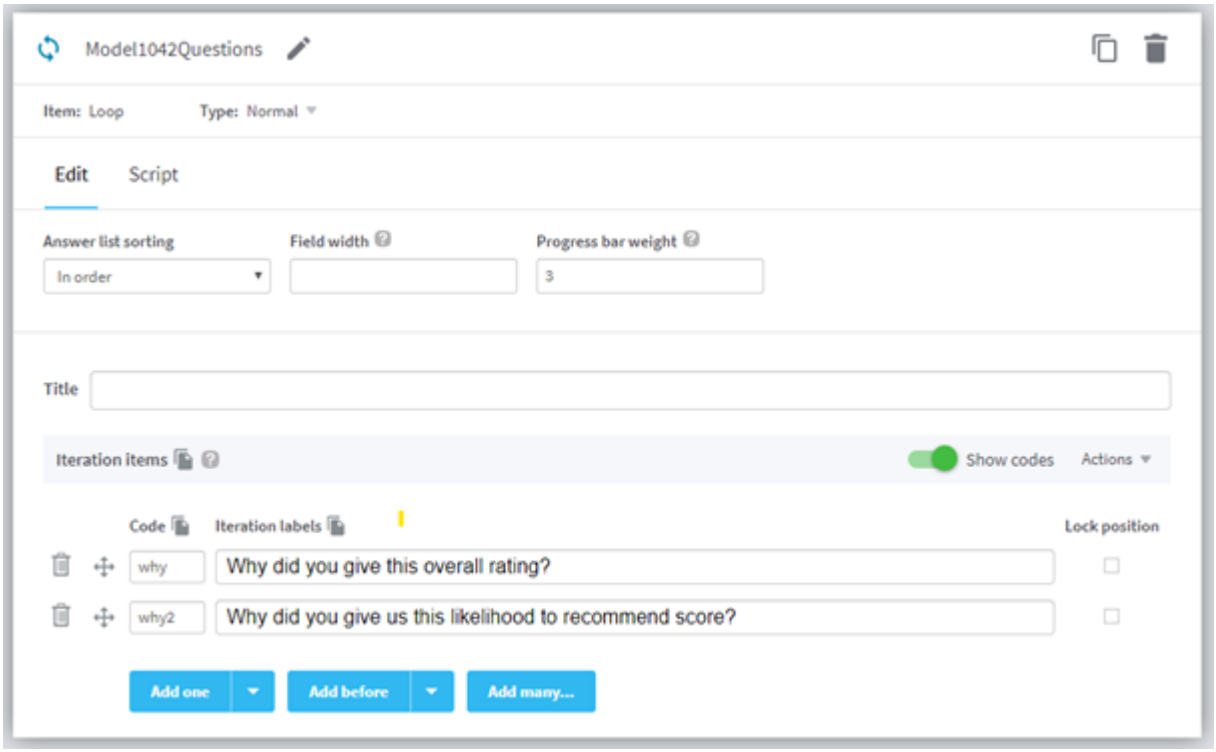


Figure 364 Example of the categories loop

6. Add a Single, Boolean variable to the inner loop and name it **Model<model nr.>Categories**, with answers **True** and **False**.
7. Add a Single variable to the inner loop and name it **Model<model nr.>CategorySentiment**, with the SentimentScale reusable scale/list as answers.
8. Add a Single, Boolean variable to the inner loop and name it **Model<model nr.>PositiveMentions**, with answers **True** and **False**.
9. Add a Single, Boolean variable to the inner loop and name it **Model<model nr.>NegativeMentions**, with answers **True** and **False**.

On completion, the Questionnaire Tree should look as in the example below, with the Model loop, Verbatim and Overall Satisfaction, Categories loop with the Categories, positive and negative mentions single Boolean variables and the category sentiment single question. The model id in this example is 1042.

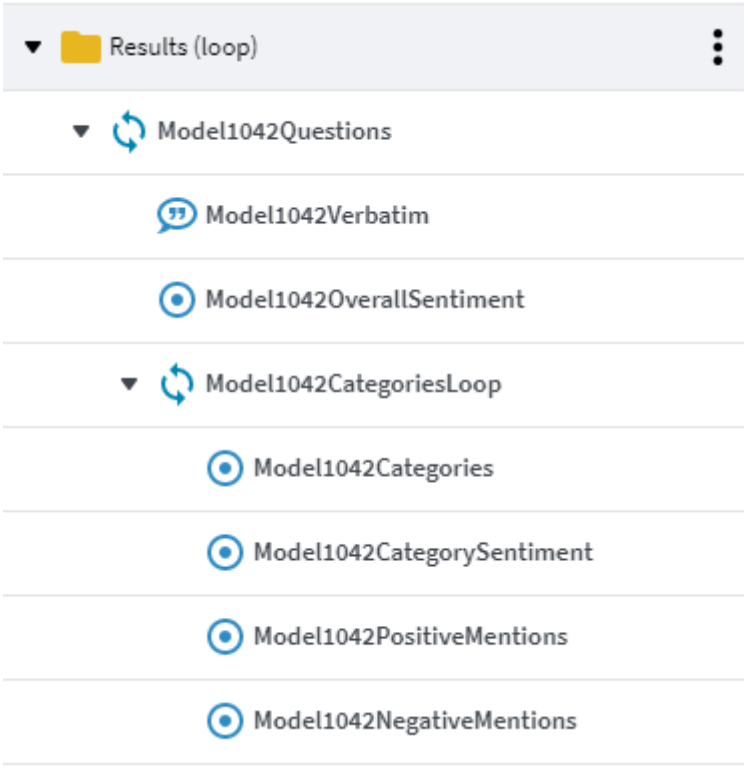


Figure 365 Example of the questionnaire set up for bringing text analytics results from multiple questions together in one loop structure

Note: You can also copy a folder from an existing project that has the Text Analytics Loopreference already setup. Be aware that if you do this you cannot launch the survey until after you have changed the loopreference name; problems will arise if you attempt to launch before you have made the changes.

Only launch the survey after you have set everything up properly. Ensure that the name of the loopreference has the name of the open end comment that you're analyzing, spelt and written EXACTLY the same. Note that it is case sensitive – it must be identical. Then the model ID number and the rest of the name CategoriesLoopReference.

If you have copied from another survey, remember to ensure that you have referenced the correct Table Lookup and that you have renamed each of the variables correctly, including the Meta data folders.

9.3. Running the Genius Task

Set up the text analytics task. To do this:

1. Go to the **Survey Management > Text Analytics** menu item.

   The Text Analytics overlay opens.

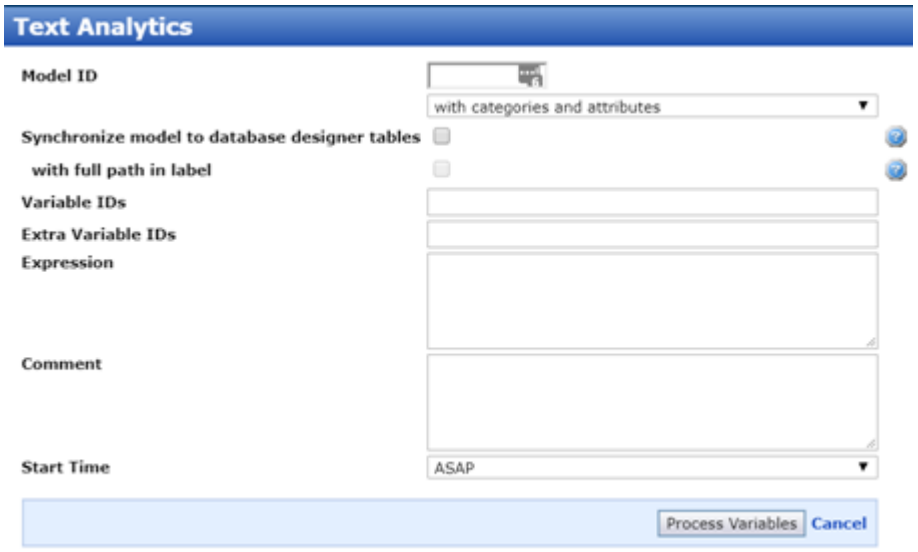


Figure 366 The Text Analytics overlay

2. Enter the Model ID (you can find this in Model Builder).
3. Select “with categories and attributes” to use the hierarchical model.
4. Select "Synchronize model to database designer tables" to automatically sync your category list from Model Builder. This means that you will not then have to worry about making manual changes if you have made changes.
5. Use "with full path in label" if you have the pipe (|) character in your category list, for use in the Text Analytics template report.
6. Enter the variable ID – this is the name of the open text question that you are analyzing.

Note: Variable IDs are case sensitive, so ensure they are exactly the same as the Qids. Note also that you must run each variable ID separately.

7. Extra Variable IDs – you can bring in background variables (currently single variables are supported) to increase the accuracy of your expressions. Type the name of the survey variable(s) that you want brought into Model Builder for use in your model.
8. You may wish to add in an expression, for example **language=="9"** (only looking at English verbatim) or interview_start > 10/1/2015 (only processing from a certain date).

Note: For more assistance with building expressions, you can use the expression builder in the Export Data section of Horizons. Go to Survey Data > Export and then click on the Edit link below the expression box. You will see a way to build the expression that you need. Copy that and paste it into the Text Analytics task expression box.

9. Set the start time for the analysis.

   You can make the analysis task recurring - refer to the Authoring User Guide for further information on recurring tasks.

Note: If you have more than 50,000 verbatim to process, set up a recurring task as only the first 50,000 verbatim will be analyzed. When the next task is scheduled to run, it will pick up the remaining verbatim and process those as well.

10. Click **Process Variables**.

    The analysis task will be run according to the Start Time settings.

Note: Only responses in which the text field contains text will be sent for analysis. Responses in which the text field is empty will be ignored.

Note: If you set the analysis to run as a recurring task, the first time it is run it will process all the data while subsequent runs will process only new or changed data.

9.3.1. Viewing the Analyzed Data

1. In Authoring open the survey and in the Confirmit menu go to **Survey Data > Edit**.

   A standard Confirmit Edit Data page opens listing the respondents.

2. Go to **Select Columns** and select the variable columns you wish to view.

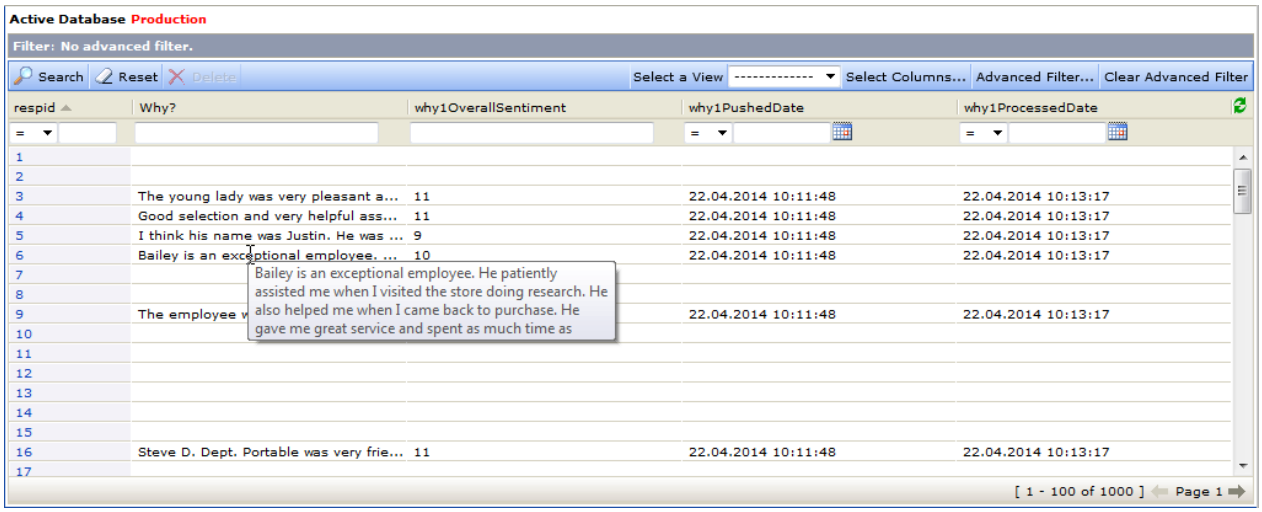


Figure 367 Example of the analyzed data

Hover the mouse pointer over a reply to view the full text. Click a respid (left column) to view the data for that respondent.

9.4. Updating Your Model

Note that Genius now has the ability to “Synchronize model to database designer tables” when setting up the Text Analytics task. If you use this option, you will not then need to go through the steps below (see Running the Genius Task on page 351 for more information).

From time to time you will need to make changes to your categorization model. If you only need to change the expressions then you will not have to update anything in Horizons. However if you need to change the structure of the model, for example adding or removing categories, sub-categories or attributes, then you will also have to update the Database Designer table.

To do this:

1. Launch your new model structure in Model Builder.
2. Go to the Category List in Model Builder and copy your updated list.
3. Paste the list into an Excel spreadsheet and save it as a tab-delimited text file.
4. Go into Database Designer, find your table by searching for the schema name, and open the table.
5. Go to the **Contents** tab and click **Upload from file** located at the bottom of the table.

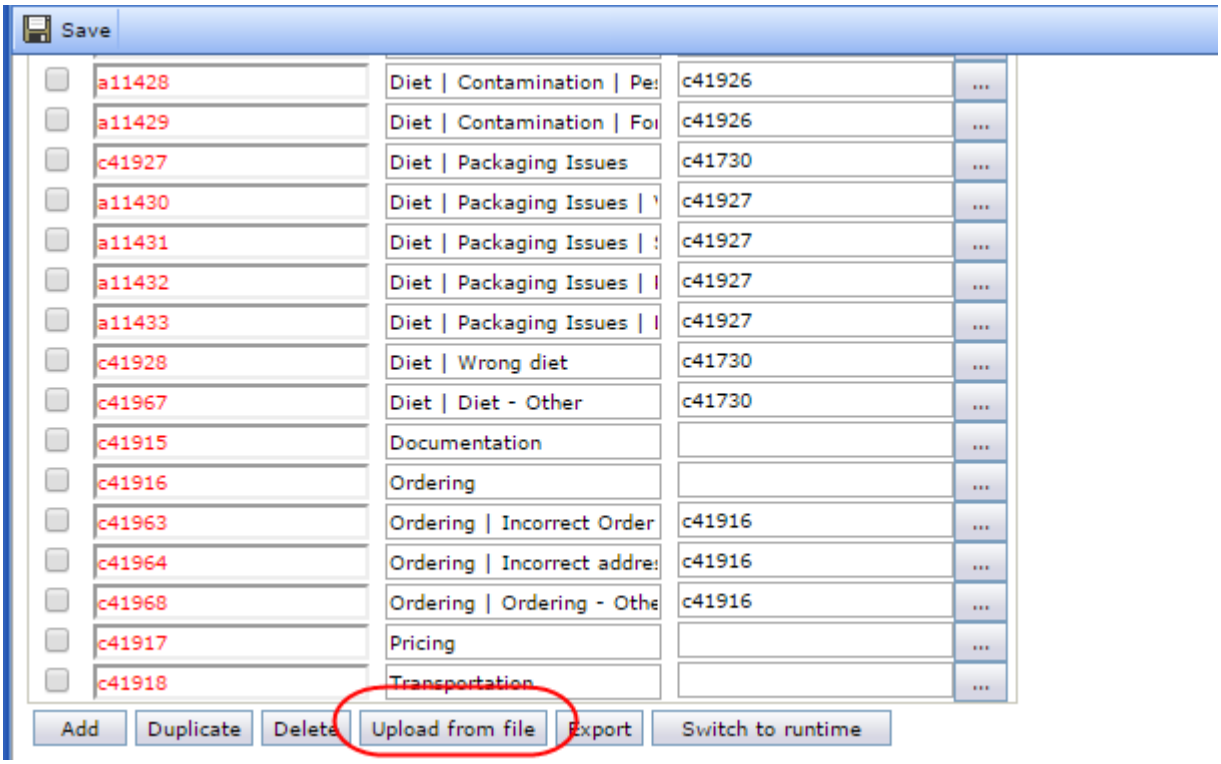


Figure 368 The table in Database Designer

The Upload Table Content dialog opens.

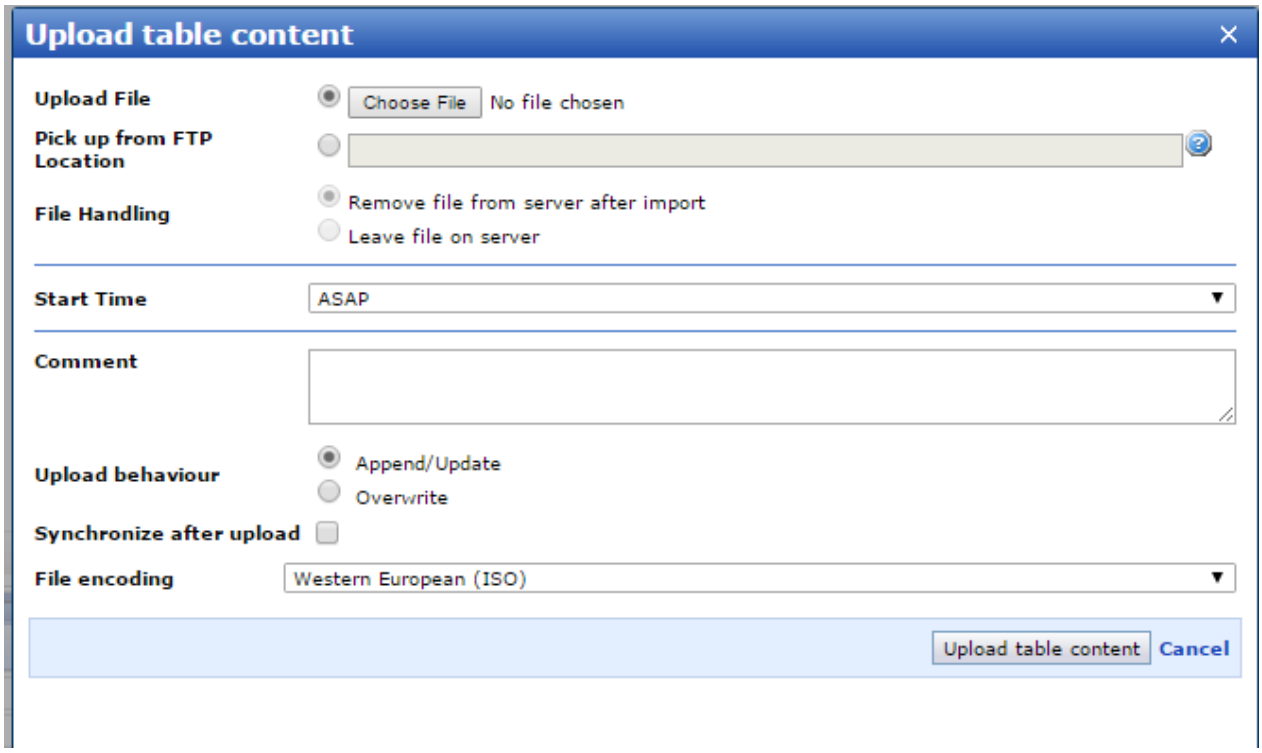


Figure 369 The Upload Table Content dialog

6. Click **Choose file** and select your file.
7. In the Upload behavior area, select **Overwrite**.
8. Check the **Synchronize after upload** box.
9. Click **Upload table content** (in the lower-right corner of the overlay).
10. When the process is completed, click **Synchronize**.

Your new categorization table will be loaded. Once your text analytics task runs again, your new categories will be included in your report. If you wish to analyze historical data, you will need to run the task yourself.

Tip
If you have a lot of historical data, then you should consider adding a start date expression into the task expression field as this will limit the analysis to only the relevant data.

Note: The Text Analytics task will process a maximum of 50,000 verbatim per run. If you have more than 50,000 verbatim, then you will need to set up a recurring task to pick up the remaining verbatim for analysis.

10. Quotas

Within a survey, you can use Quotas to specify the number of responses you would like to receive for different sub samples or target groups, or to limit the number of responses for the overall survey. When a quota is reached for a sub-sample, the survey can be closed automatically for respondents belonging to that sub-sample by using conditions and stop nodes, while it remains open for respondents belonging to other sub-samples that have not yet been filled. In addition, Confirmit can send alerts by email to specified addresses when a quota is full.

Confirmit allows full quota control based on both demographic and attitudinal questions, or not based on any specific questions for an overall quota (global quota) on the total number of completes. Quota control can also be achieved on compound quotas, that is quotas consisting or built on two or more variables.

The quota definition will be part of the survey definition. This means that the same definition is used in both Production and Test mode, and that the quota definition will not be deleted when you create a new survey database. Current quota counts will naturally be different for the test and production databases, and will be removed when creating a new survey database. The quota definition will also be included in survey export/import and when duplicating a survey.

Note: You can set up different quota limits for the Test and Production databases. This allows you for example to test the survey using a reduced number of respondents to save time, whilst setting the "full" number of respondents for the Production database as you are building the survey. To switch between databases, use the database selector towards the lower-right corner of the Confirmit window.
Changes to quota attributes, such as the quota name, row header, column ordering etc. can only be made whilst in the Production database. When in the Test database you can only create the quotas and change the quota limits. You cannot delete questions from quotas, and all other quota functionality is disabled.

Example:

You have a pop-up survey running, and you know that the majority of people visiting the site will be young (your estimate: 5% will be 40 years or older). However, you are also interested in opinions from people of 40+, and you would like to have 100 responses from that sub-sample. Without quota management you would have to “wait” for 2000 complete responses (2000*5%=100). But if you only need for example 200 responses from the younger group, you can screen the superfluous responses by setting quotas. You can close the survey for those younger than 40 after receiving 200 responses, and just let the others in until their quota is also completed.

You use a condition to terminate the survey for respondents in a target group where the quota is full (see Terminating the Interview for Respondents when Quota is Full on page 384 for more information).

Note: Quotas can be exceeded. By default, a “Quota full” counter is activated (thereby preventing further interviews being started) when the number of completed responses reaches the desired number. Any respondents who start their interviews before the count is reached will be allowed to complete the interview. Any respondents who attempt to start after the count is reached will be informed that the quota is full. Therefore, in the event a large number of invitations are sent and/or the interview can take a long time to complete, there will be a risk that the quota(s) can be exceeded. Optimistic Quotas can be set such that the counters are incremented before the interview is completed (see Optimistic Quotas on page 378 for more information).

Note: A supervisor may need to view and modify the quota targets without needing to edit the survey questions. A special permission is available under the Admin menu to enable this. Refer to the Administrator manual for further details.

For Single, Multi and Grid questions, a Quota Wizard is available to assist you with creating your quotas (see The Quota Wizard on page 375 for more information).

10.1. Two Alternative Modes

The interface for quota definition in Confirmit can be presented in one of two ways: **Grid mode** and **List mode**.

10.1.1. How to Change Modes

To change the mode, right-click on the quota in the Questionnaire Tree toolbox and select **Edit in List Mode** or **Edit in Grid Mode** as appropriate . If the quota cannot be opened in Grid mode (see the Note below) then the menu item will not be available.

Note: A quota in Grid Mode can at any time be opened in List Mode instead. A quota in List Mode can be opened in Grid Mode if it contains only single questions and the number of cells is below the limit for the maximum number of cells (see The Grid Mode on page 357 for more information).

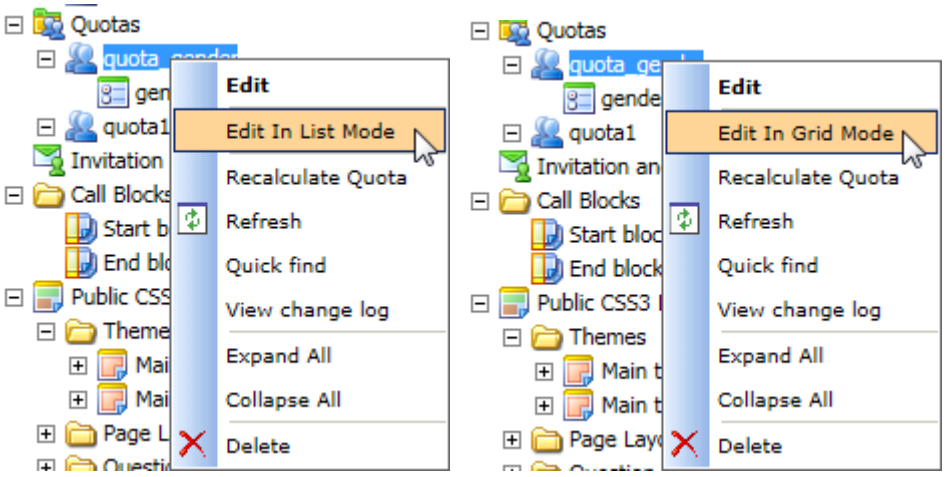


Figure 370 Changing to List mode when in Grid mode and vice versa

10.1.2. The Grid Mode

Grid mode can be used when the quota consists of single questions only. This mode gives a compressed layout similar to a cross-table, with one question presented in the rows and the other questions nested in the columns. You select which question is to be in the rows in the Settings tab (see The Grid Mode Settings Tab on page 360 for more information). Grid mode is recommended when you have quotas consisting of only a few questions, and you wish to define targets for all or nearly all combinations of responses to those questions.

Important
If you add a custom total, the quota will check against the number of completes regardless of whether or not the single questions have been answered. So the custom total in Grid mode will only make sense if the quota contains single questions that store a value for all respondents.
This is because a custom total will automatically generate an 'Any' limit (if you switch to list mode you can see this limit). [Any] is more applicable to multi questions, and [Any] quota limits are incremented for any answer, even for blank. So if you have a quota limit with [Any] fields, it will merely count interview completes irrespective of whether the questions are answered or left blank.

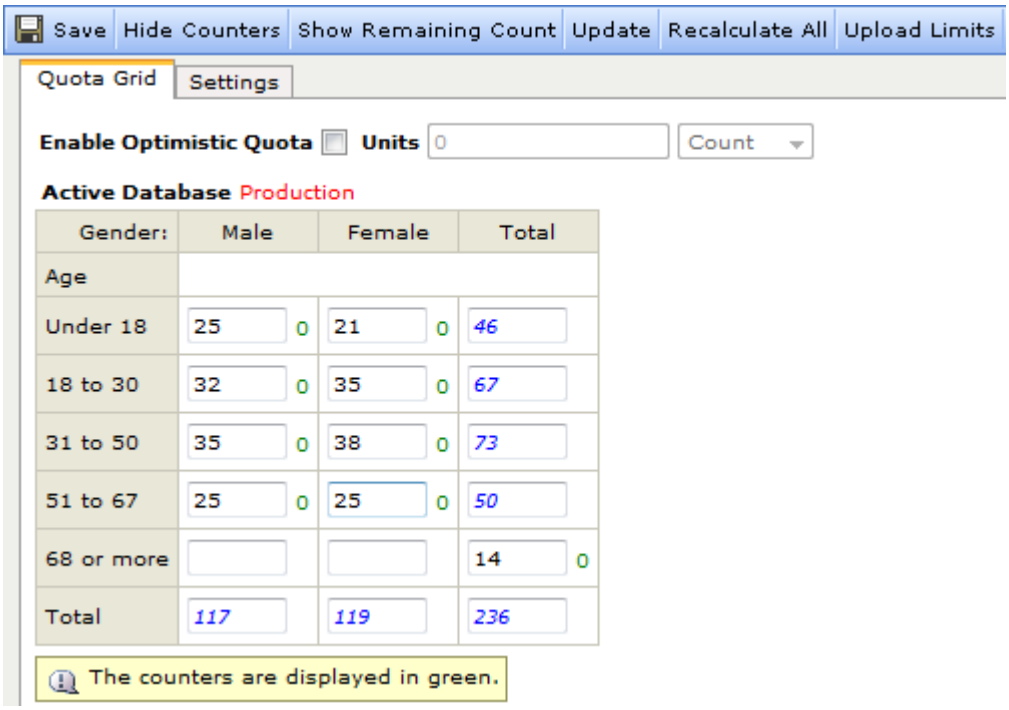


Figure 371 Example of a Grid mode table

For system performance reasons, a limit on the maximum number of cells in the quota grid is enforced. This limit is configurable at server level, and the default for this is 500 cells. To reduce the number of cells, you can hide or mask answer alternatives that are not used for quota targets (see Hiding Unwanted Answer Alternatives on page 371 for more information). If this method will not reduce the number of cells below the limit, consider using List mode instead (see The List Mode on page 361 for more information).

10.1.2.1. Examples of Quotas using the Grid Mode

The grid mode displays the quota definition in a table, with questions on which the quota are to be based, located in the rows and columns. The various quota targets and counts are presented between the questions' answer alternatives. The three examples shownbelow illustrate the quota grid for a quota based on one single question, a quota based on two single questions, and a quota based on three single questions.

The targets (black text on white background) are in editable cells. These are the values you type in to define the quota limits. The cells are not "required", so you do not have to input values in all the cells. You can define quotas for only some of the answers (or some combinations of answers in multidimensional quotas) if desired. If a cell is left blank there will be no quota for that cell.

The green numbers to the right of each target indicate the counts (the number of complete responses received so far). To hide the Counts, click the **Hide Counters** button above the table. If you wish to show the amount remaining to reach the target for each quota cell, click **Show Remaining Count**.

This figure shows the quota grid for a quota with one question:

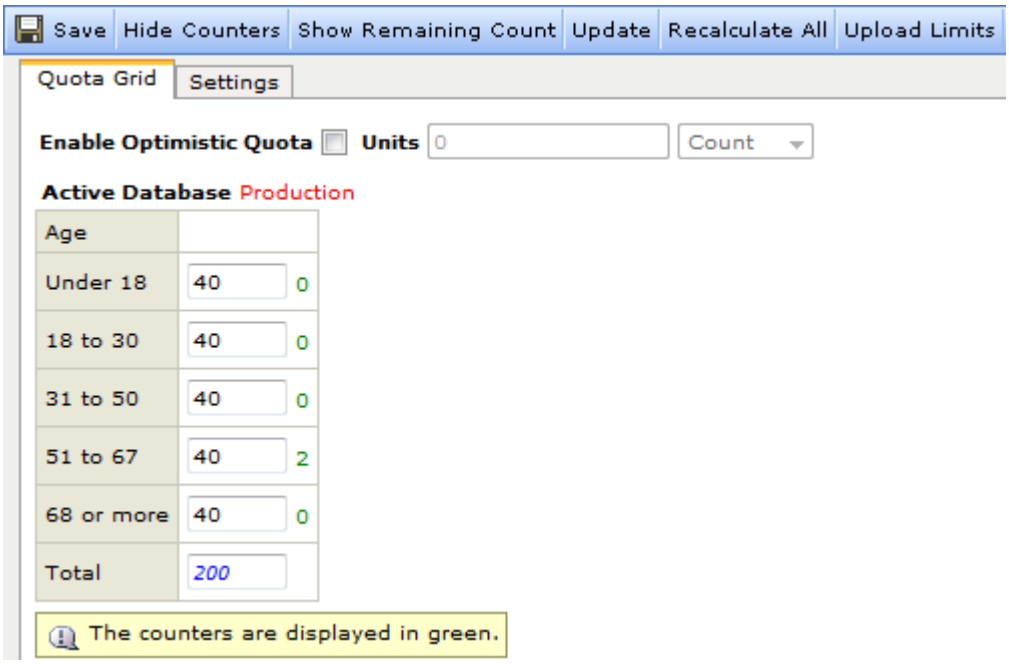


Figure 372 Quota based on one question

In the above example, the user requires a total of 200 responses evenly divided between the five age groups. Some respondents have already replied to the questionnaire; for example the user has received two replies in the 51 to 67 age group.

This figure shows an example with two questions in the quota:

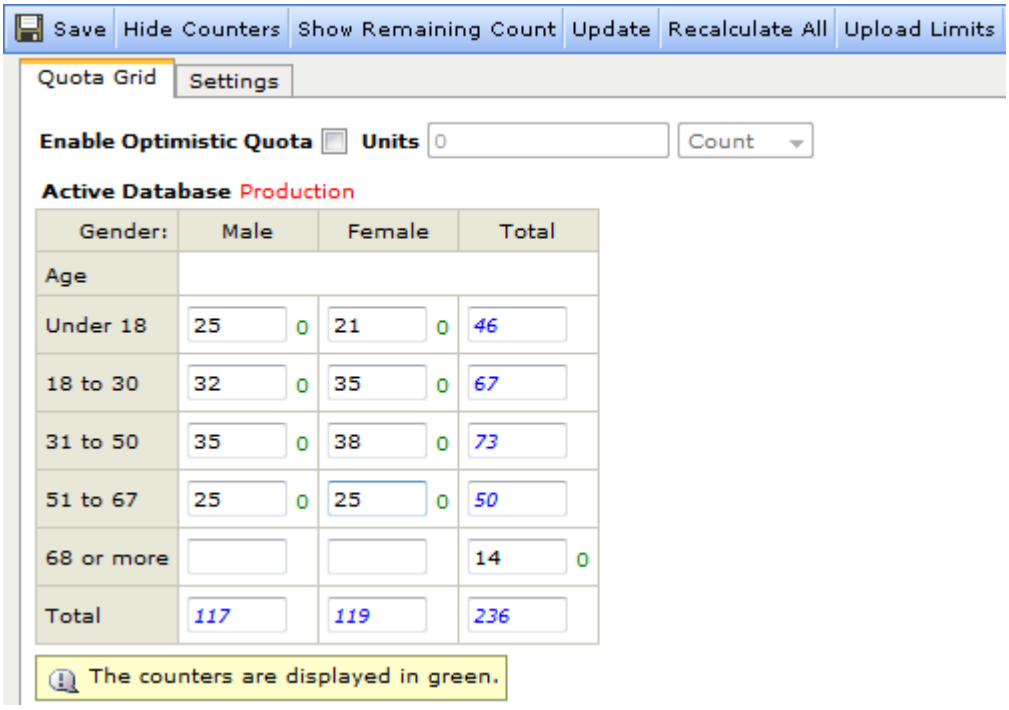


Figure 373 Quota with two questions

In the above example the responses are to be divided "manually" both by age group and gender. The user has defined individual scores for each cell (black figures), and these have been added automatically by Reportal to give the totals (blue figures). For example, in the 51 to 67 age group the user wants replies from 25 male and 25 female respondents.

This figure shows an example of a quota based on three questions:

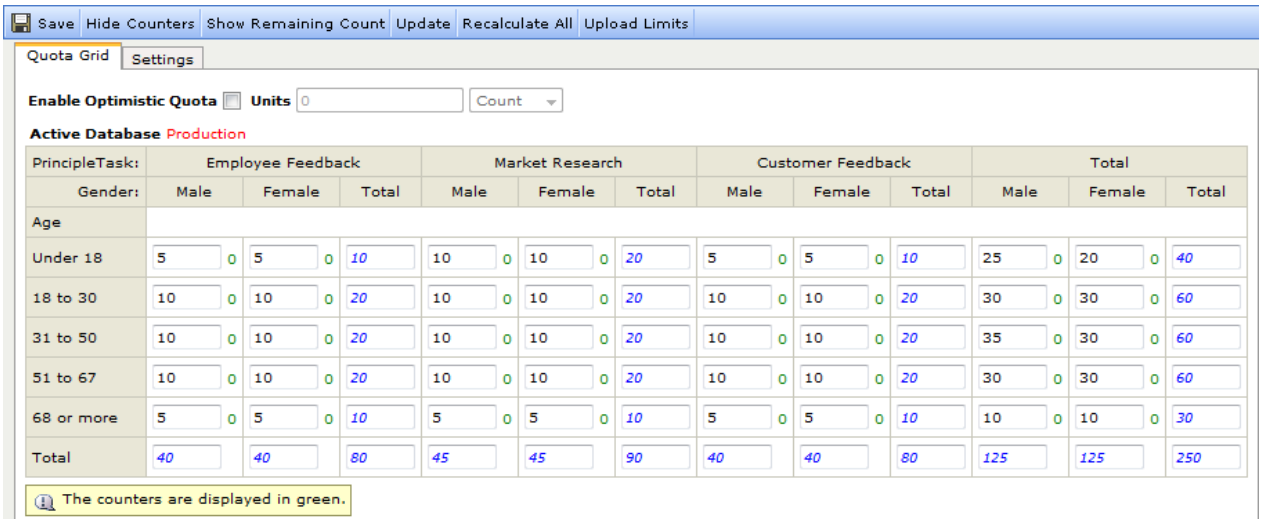


Figure 374 Example of a quota with three questions

Here, the user wants a total of 250 responses, specified by age group, gender and task.

10.1.2.2. The Grid Mode Settings Tab

In the Grid mode's Settings tab, you can select the question that is to be used in rows. If you have more than two questions, you can also control the nesting order in the columns (which question is nested on top of which).

Note: Changes to quota attributes, such as the quota name, row header, column ordering etc. can only be made whilst in the Production database. When in the Test database you can only change the quota limits; all other quota functionality is disabled.

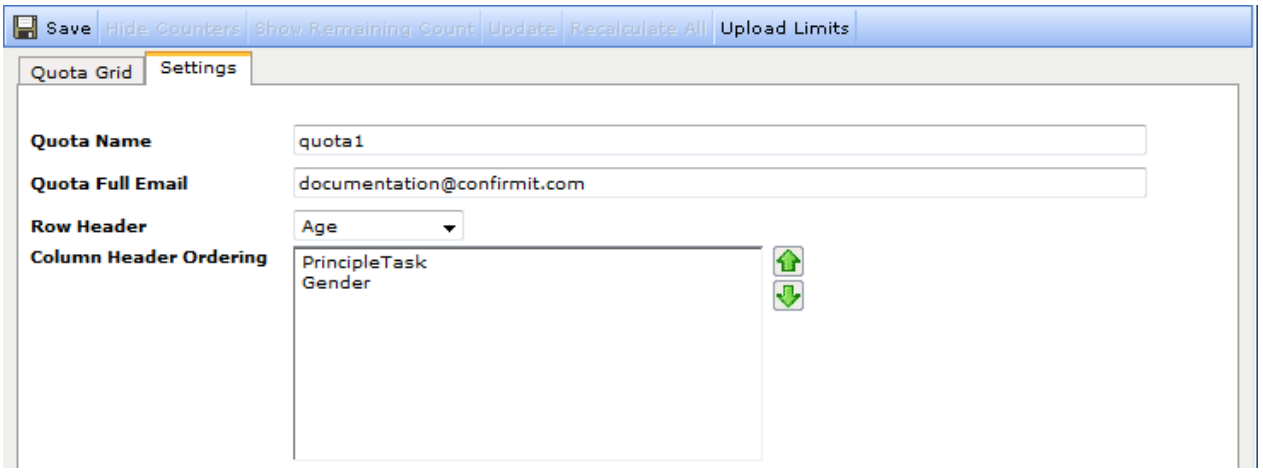


Figure 375 Row selection and column header ordering

The fields are as follows:

- **Quota Name** - the name of the quota as used in the Questionnaire tree. Here you can change the name of the quota as required.
- **Quota Full Email** - the address to which the notification email will be send when the quota is filled (see Email Alert on Full Quota on page 384 for more information).
- **Row Header** - click the down-arrow to open a drop-down list of the questions selected for the quota, and select the question you wish to use in the rows. The remaining questions will be listed automatically in the Column header ordering field.
- **Column Header Ordering** - all questions that are selected for the quota that are not selected to be in the rows, will be listed here. Click on a question and click one of the green arrow buttons to the right of the field to change the nesting order for the questions.

In the event the CATI Survey option is checked in the **Survey Settings > Survey Channels** tab, then two additional options become available below the Column Header Ordering field:

- **Display Quota in CATI Supervisor -** when enabled, this quota will be available for CATI Supervisors to manage from the survey view. Enabling this option will result in the "Available as CATI filter" property being enabled for all questions used in this quota.
- **CATI Delivery when Quota Not Full -** when enabled, CATI interviews will automatically be removed from the CATI call list and be given an extended status value of 27 (Filtered by call delivery) when the quota cell they fall into is full. The only exception is interviews with the extend status value of 1 (appointment); these will remain in the call list.

10.1.3. The List Mode

In **List mode**, the quota definition consists of a table with one row for each quota cell. The variables included in the quota are laid out in the columns. When you add a row to the table, you specify which values the different quota cells should be applied to by selecting the desired options in drop-downs for each column (see Defining the Quota Values in List Mode on page 372 for more information).

List mode is used in quotas when:

- The quota contains one or more grid or multi questions.
- The quota contains no questions; you are defining a global quota on the total number of completes independent of answers to any specific question.
- The quota contains single questions only, when you are defining quota targets for a subset of the possible combinations of the responses to those questions.

Note that if you are defining targets for all or nearly all of the possible combinations of responses, you may find the Grid mode easier and faster to use.

The List mode displays up to 100 rows. In the event your list contains more than 100 rows then the list will be paged. Click the arrow buttons in the lower frame of the page to move between pages.

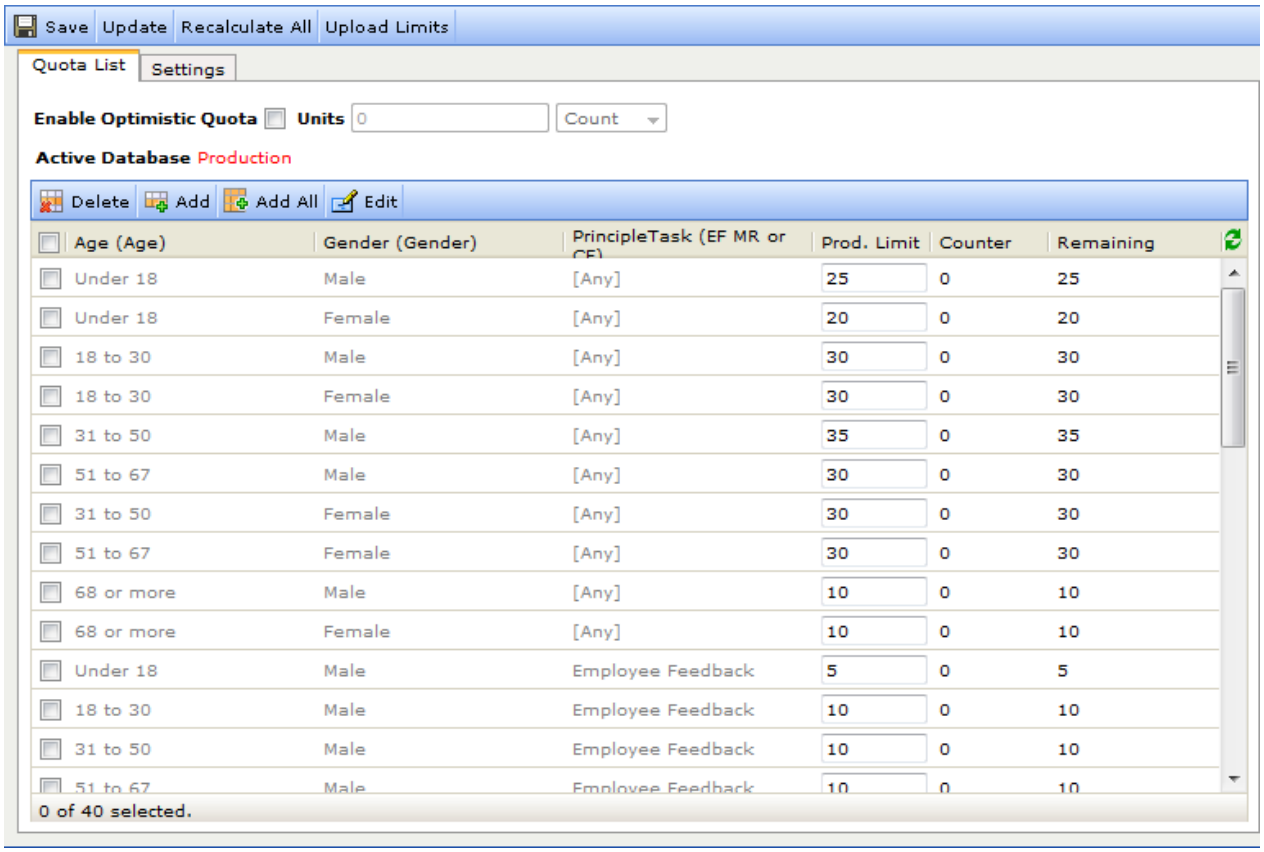


Figure 376 Example of a List mode table with two single questions

For system performance reasons a limit for the maximum number of columns (variables) that can be displayed in list mode is enforced. However, as it is possible to hide columns from the mode, the quota definition may consist of more columns than this limit. The limit is configurable at server level, and is by default set to 25 columns (variables).

Note: A quota in Grid mode can at any time be opened in List mode instead. A quota in List mode can be opened in grid mode if it contains only single questions and the number of cells is below the limit for the maximum number of cells (see above).

In List mode, both the current count and the quantity remaining to reach the target are displayed in the table next to the quota target.

To prevent users from accidentally altering a quota definition in List mode , the quota fields are read-only when a quota is reopened. To modify one or more quota cells, select the checkbox next to the row and then click the **Edit** button.

10.1.3.1. Grid Questions in List Mode

If a **Grid question** is used for a quota, there will be one field for each answer alternative as with a multi question, with the scale and "Any" as a drop-down for each of them. In this case, **Add all** will create all possible combinations of the different scale responses on all the elements in the grid. Note that if the number of combinations is above the server limit (default is 1000), then the combinations will not be displayed.

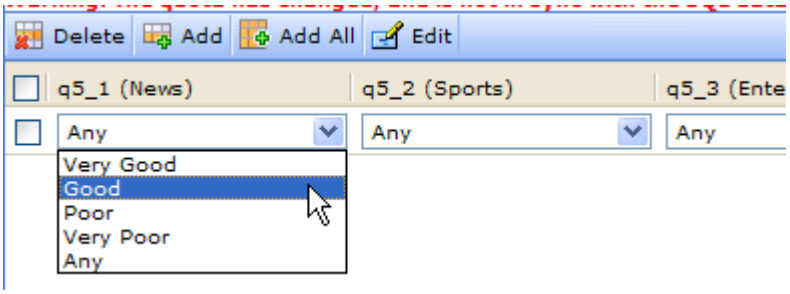


Figure 377 Quota details for a grid question

Note: If you have more than 25 variables (single questions and answer elements of multis and grids) in the quota definition, only the first 25 will be displayed in List mode. You can select in the Settings tab which of the fields are to be hidden from the List mode (see The List Mode Settings Tab on page 365 for more information). Note that the hidden fields will still be part of the quota definition.

10.1.3.2. Multi Questions in List Mode

If a **Multi question** is used for a quota, there will be one field for each answer alternative in the multi. There are three possible valid states for each answer alternative in a multi, as shown in the figure below.

- **Chosen** - this answer alternative has been selected.
- **Not chosen** - this answer alternative has not been selected
- **Any** - no specific answer alternative has been selected by the user. The respondent's selection will be ignored for this quota cell, but the respondent will be counted as part of the quota.

Note: "Any" will be counted by the quota whether or not the respondent has answered the question. This can mean that the quota will be filled before you have enough "completed" data, so the Any value should be used with caution.

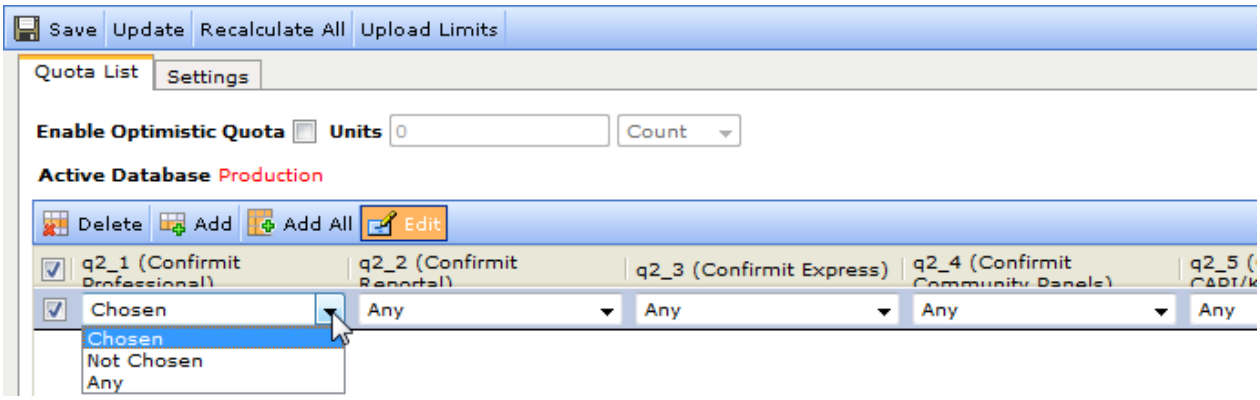


Figure 378 The Quota details for a multi question

Note that if a respondent in the quota in the figure above has selected for example Confirmit Professional in combination with Confirmit Reportal, and the Confirmit Reportal quota is full, the "quota full" function (qf) will return TRUE for that respondent, even if the Professional quota is not full. Often in such circumstances you might want to let the respondent continue for Professional as that is not yet full. If that is how you would like the quota to work, you should consider basing the quota on a hidden single question instead, which would check the quotas using scripts. The scripting manual contains an example of such a scenario ("Presetting a Quota Question to Check Several Quotas").

Add all on a multi question will generate a target for each of the items in the multi's answer list. Each of these targets will have "Chosen" set for one item in the multi, and "Any" for all the others.

Note: If you have more than 25 variables (single questions and answer elements of multis and grids) in the quota definition, only the first 25 will be displayed in List mode. You can select in the Settings tab which of the fields are to be hidden from the List mode (see The List Mode Settings Tab on page 365 for more information). Note that the hidden fields will still be part of the quota definition.

10.1.3.2.1. Single Targets

A quota that is based on a multi question creates a "self-matrix". However many users will want to set a target for a specific category and have [Any] for all of the other categories. This will effectively result in a target set as if it is a "single-in-a-multi", with the remaining categories set to [Any].

The **Single Targets** button will be available in quota list mode under the following conditions:

- The quota is based on one multi question.
- The quota does not contain any limits with the "Not Chosen" value.
- Only one "Chosen" value is selected in the quota.

In the example below, the quota is based on the Cars Tested multi question. Only the first category is set to Chosen, with all the other categories set to Any, so the **Single Targets** button is available.

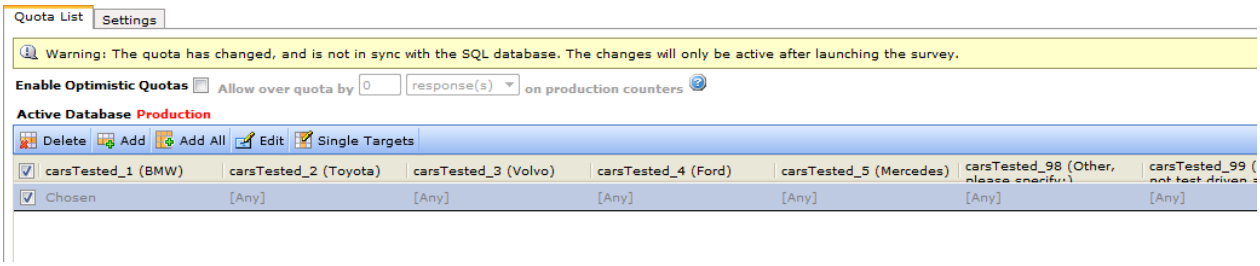


Figure 379 The quota has just one category Chosen, all the others are set to Any

When the **Single Targets** button is toggled on, the layout of the quota changes.

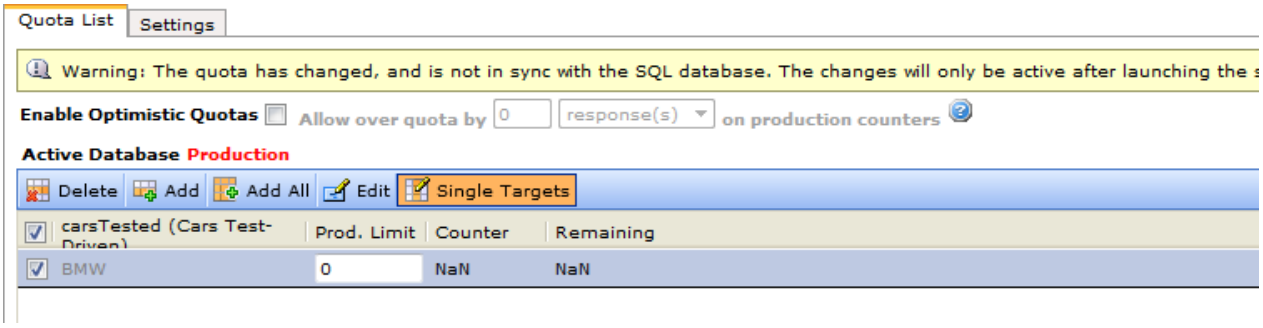


Figure 380 Single Targets is toggled on

The **Single Targets** button functions as a toggle; click to change the view, click again to switch back to the normal view.

All functionality normally available for the quota is also available in the Single Targets mode (Add all, Add, Delete, Edit, Limits edit). The state of the toggle button is stored with the quota and will be restored when the quota is reopened. The state is also maintained when duplicating or exporting/importing the survey.

10.1.3.3. The List Mode Settings Tab

In the List Mode Settings tab, you can select fields to be hidden or excluded from the List mode. Note that hidden fields will still be a part of the quota definition. If some fields are not to be a part of the quota definition, they can be excluded.

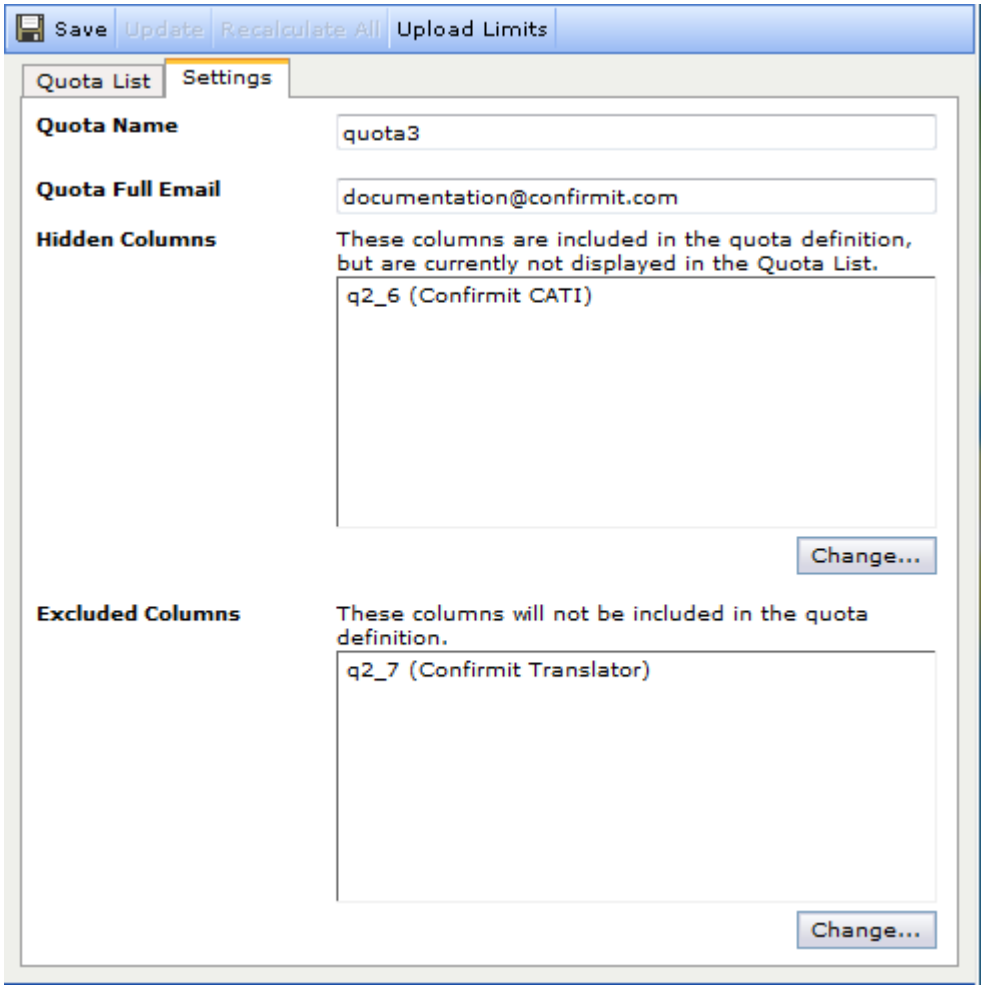


Figure 381 Hiding and excluding columns in List mode

Note: Changes to quota attributes, such as the quota name, hidden and excluded columns etc. can only be made whilst in the Production database. When in the Test database you can only change the quota limits; all other quota functionality is disabled.

In the event the CATI Survey option is checked in the **Survey Settings > Survey Channels** tab, then two additional options become available below the Extended Columns field:

- **Display Quota in CATI Supervisor -** when enabled, this quota will be available for CATI Supervisors to manage from the survey view. Enabling this option will result in the "Available as CATI filter" property being enabled for all questions used in this quota.
- **CATI Delivery when Quota Not Full -** when enabled, CATI interviews will automatically be removed from the CATI call list and be given an extended status value of 27 (Filtered by call delivery) when the quota cell they fall into is full. The only exception is interviews with the extend status value of 1 (appointment); these will remain in the call list.

To select the fields that are to be hidden or excluded:

1. Click the respective **Change** button.

   The Show/Hide or Include/Exclude Columns window opens as appropriate.

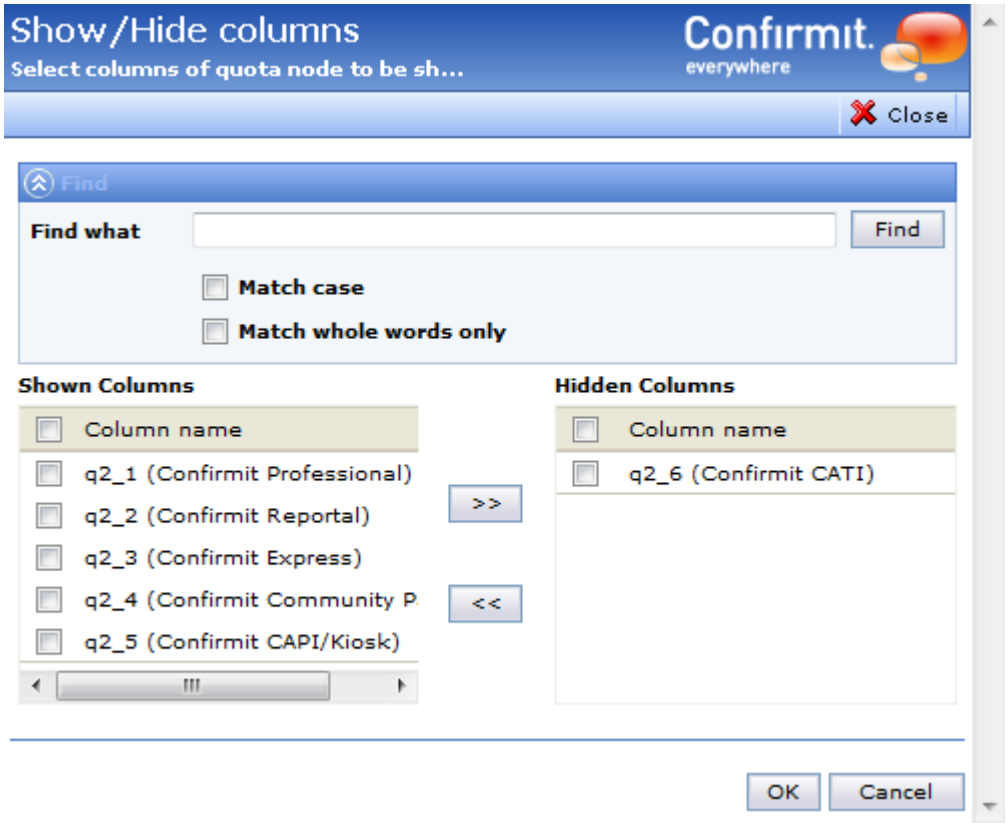


Figure 382 Example of the Show/Hide Columns window

2. In the Show Columns (Included Columns) list, check the boxes for the columns you wish to hide.
3. Click the **>>** button to move the selected columns to the Hidden (Excluded) Columns list.
4. Click **OK**.

   The Window closes, and the selected columns are listed in the Hidden Columns or Excluded Columns fields as appropriate.

10.2. How to Define Quotas and Quota Forms

Quotas are set up in the questionnaire tree, where a "Quotas" folder is located towards the bottom of the tree.

Note: You can create quotas and set/change the quota limits while in the Test database, but all other quota attributes are deactivated. If you wish to change the quota attributes, such as the quota name, row header, column order, hidden columns etc. you must be in the Production database.

To create a Quota:

1. Drag a Quota object from the New Objects toolbox and drop it into the **Quotas** folder, or right-click the **Quotas** folder and select **Insert Quota**.
2. In the Questionnaire Tree, drag the questions that are relevant for the quota down to the Quotas folder, and drop them into the new quota object (drop them onto the object icon, not the text).

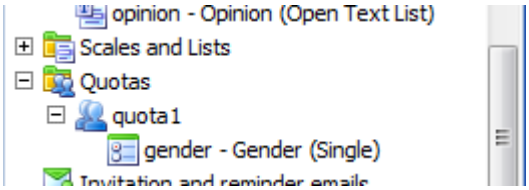


Figure 383 Adding quotas to a survey

Only single, multi and grid questions can be used for quotas. **Forms from within loops cannot be used.** If you need to base a quota on questions within loops, you must set up one or more hidden questions outside of the loop, and set them from the loop questions through scripting.

3. Double-click on the new quota object to open the Quota Details page.
4. Set up the required quota limits.
5. Launch the survey.

Note: If you make changes in the quota definition after you launch the survey (for example removing, adding or changing limits), you can click the Update button in the interface to apply the changes to the production or test environment. However, if you add or remove questions from a quota definition, you must re-launch the survey.

10.2.1. Defining the Quota Values in Grid Mode

To define quota limits in Grid mode:

1. Type into the appropriate cells in the table, the required limits for those questions.
2. Click **Save** the save the changes.
3. Click **Update** to synchronize the quota values with the database.

For example, in the illustration below, the user has specified that he/she wants a total of 25 males and 21 females in the "Under 18" age group. The Totals in blue italics (in this row, 46) are auto-populated sums from the individual quotas in the column or row. However these total fields are also editable, and you can specify a total for the row or column instead of for the individual cells. Manually specified totals are also displayed in black, as in the "68 or more" row.

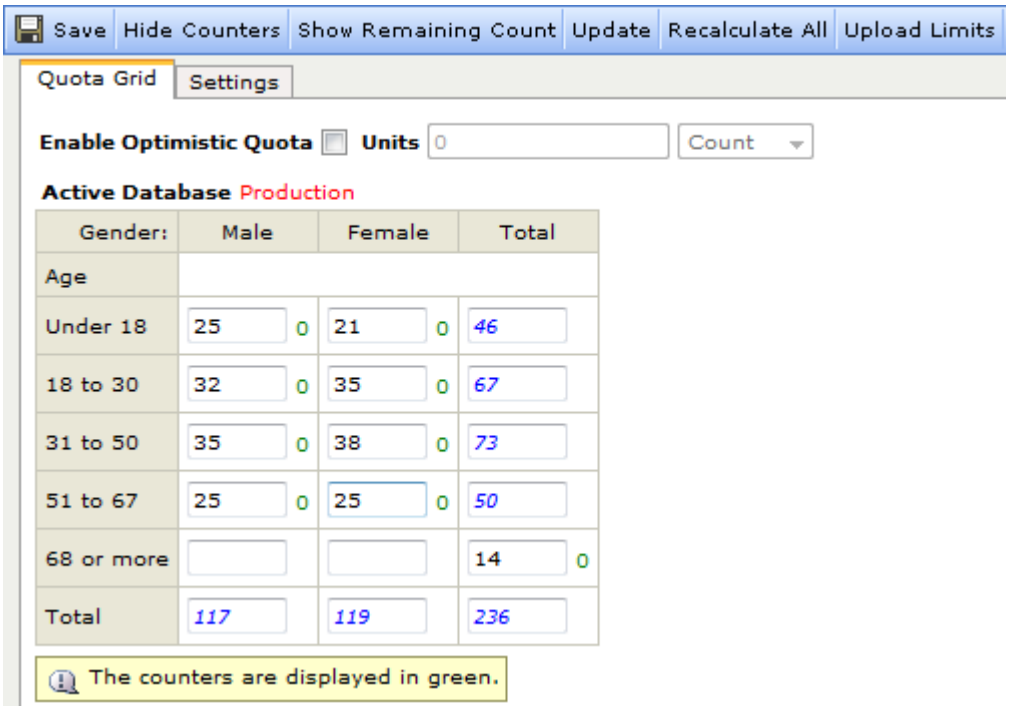


Figure 384 Combining subtotals and cell targets

To define a quota on the total:

1. Type a number into the appropriate Total field.

   This value will be displayed in black to distinguish it from the auto-populated values in blue italics.

2. Save the changes.
3. Update the database (launch the survey).

You can use a combination of setting totals on rows or columns and defining specific cells, as in the example above. Here the quota limit on the age group "68 or more" is set to 14 regardless of gender. Note that actual counts for totals will only be displayed for totals and subtotals that have be given a specific target (black number). Actual counts will not be displayed for calculated totals and subtotals (blue numbers).

The calculated totals will only take quota cells into account, not subtotals. The total (lower right corner) in the table above is therefore 236 as the **14** specified for the "68 or more" age group are not included when the total is calculated. Note that only the black values input by the user are quota restrictions; the blue, calculated numbers for totals and subtotals are for information, they are not restrictions.

In the example below, where no specific limits are defined for respondents in the age group "68 or more", the survey may well result in more than 236 respondents. This is because any respondent in the "68 or more" age group will be allowed to complete the survey, and these will be in addition to the specified limits.

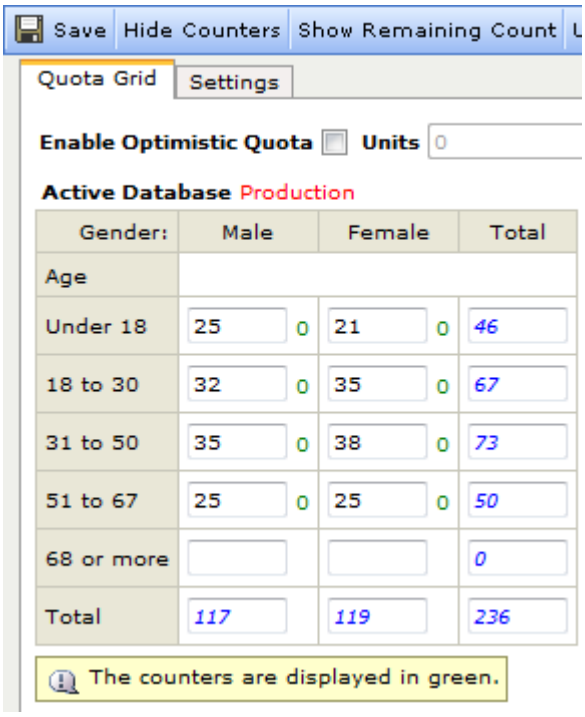


Figure 385 Quota definition with holes

You can specify a total number for a column, a row or the entire table, and allow the system to distribute this total evenly across the applicable cells for you. To do this:

1. Enter the appropriate total number in the Total cell.
2. Right-click in the Total cell and select **Distribute**.

In this case, a total of 250 has been specified for the entire table, then distributed. This has resulted in quotas of 25 for each cell. You can now go in and make further adjustments to individual rows, columns or cells if you wish.

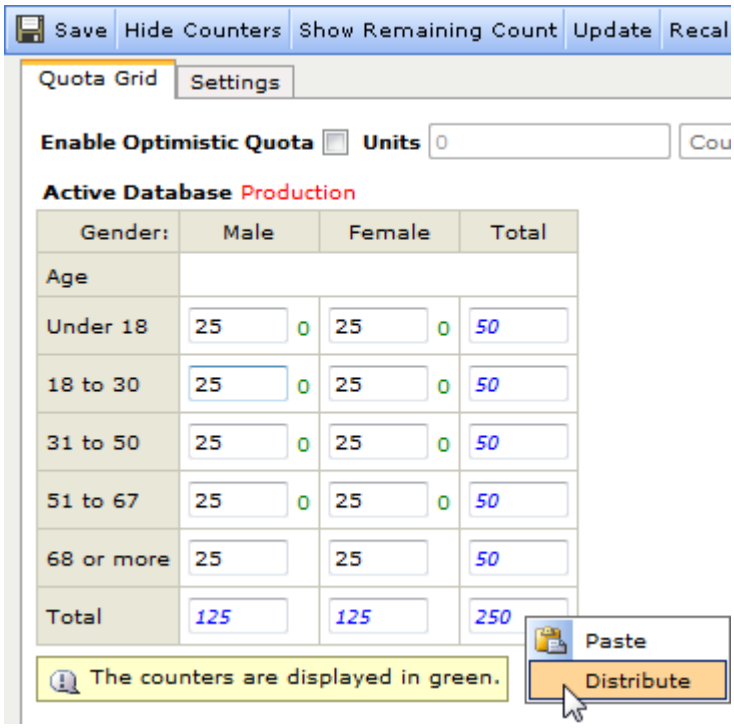


Figure 386 Distributing Quotas

Important
If you manually change the blue "Total" rows or columns for a single question, an "Any" row may automatically be added to the table. This row will not be visible in the Grid mode, but can be seen in the List mode. The row will cause a problem in the results if a "qt" or "qc" count is performed, because the respondent will always qualify for one of the answer choices AND the Any option.

10.2.1.1. Removing the Totals from Grid Mode

Remove the totals from the quota table as follows:

1. Right-click the question under the quota and select **Properties**.

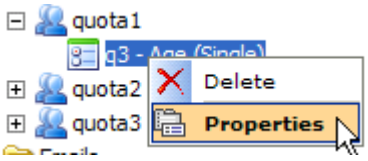


Figure 387 Opening Properties for the question inside the quota

The Properties page for the question opens towards the right side of the Confirmit window.

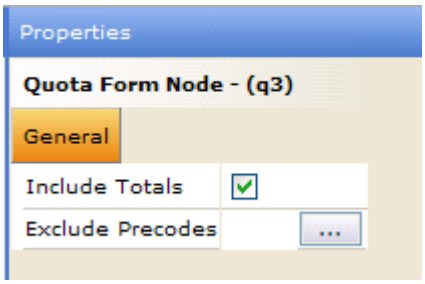


Figure 388 The Properties page for the question inside the quota

2. In the Properties page, deselect **Include Totals** if you do not want the totals to be displayed in the quota table.

Note: This action will delete from the database any totals that have been specified for the table (black values that have been input into the Totals row by the user). If at a later date these total values are required, you must re-select the Include Totals box and then input the appropriate values again manually.

3. Save the changes.

   A Confirmation box is displayed, asking you to confirm the deletion.

4. Click **OK** to confirm, **Cancel** to cancel the operation.

10.2.1.2. Hiding Unwanted Answer Alternatives

If some answer alternatives are not to be part of the quota definition, you can hide or mask them from the quota grid. This procedure can also be used to reduce the number of cells in the quota grid below the maximum allowed (see The Grid Mode on page 357 for more information).

To select the answer alternatives you want to exclude from the quota table:

1. Right-click the question under the quota and select **Properties**.

   The Properties page for the question opens towards the right side of the Confirmit window.

2. Click the **Exclude Codes** button.

   The Exclude Codes window opens.

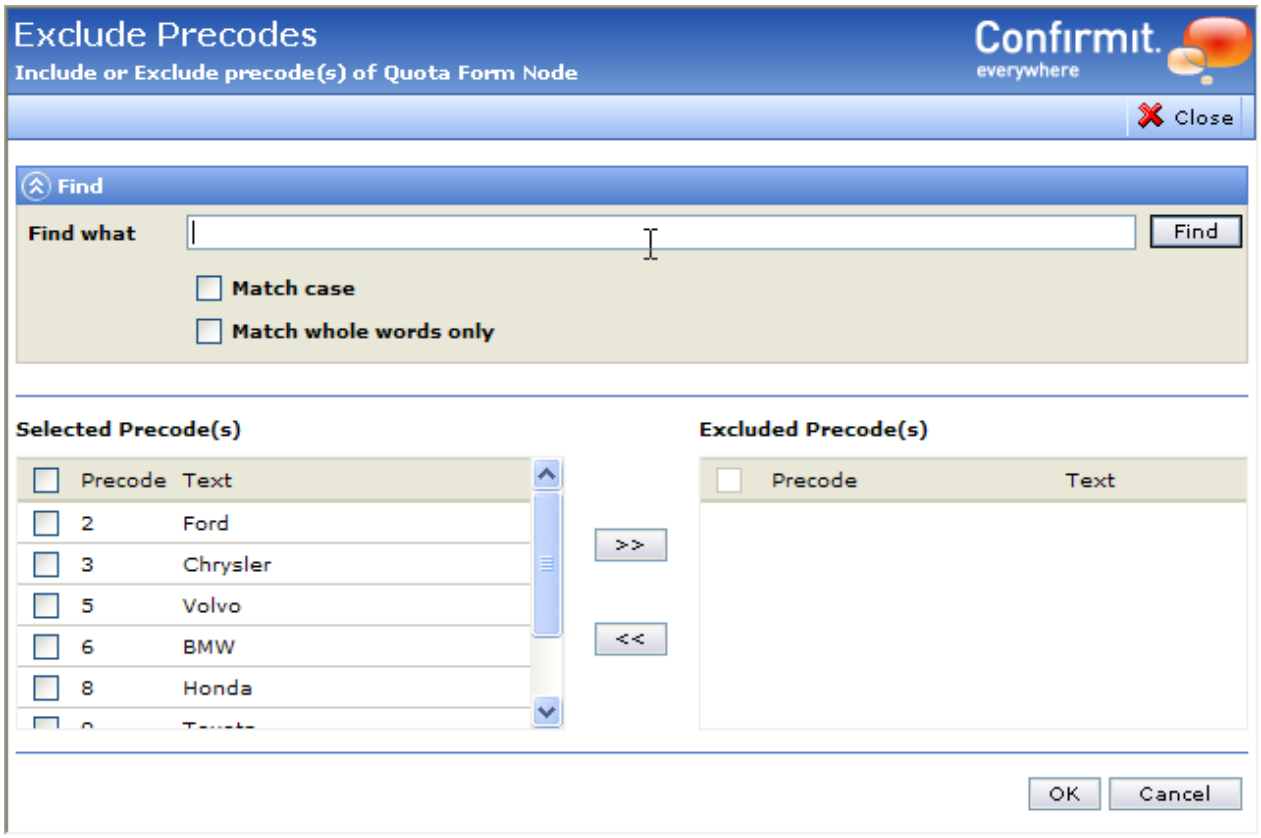


Figure 389 Excluding codes/answers from the quota table

3. In the Selected Codes column, check the boxes beside those codes that you wish to exclude.
4. Click the **>>** button to move the selected codes to the Excluded column.
5. Click **OK**.
6. Save the changes.
7. Click **Update** to apply the changes to the database.

The excluded codes are hidden from the list in the table. To return them to the table, go to the Exclude Codes window, select them in the Excluded column and click the **<<** button. Then click **OK**, **Save** and **Update**.

10.2.2. Defining the Quota Values in List Mode

As explained in the List Mode section, the List mode comprises a table with one row for each quota cell as shown below. In this case, the table has a row for each Age option, with the Gender question displayed in the second column. Initially, the second column will not have specific values selected.

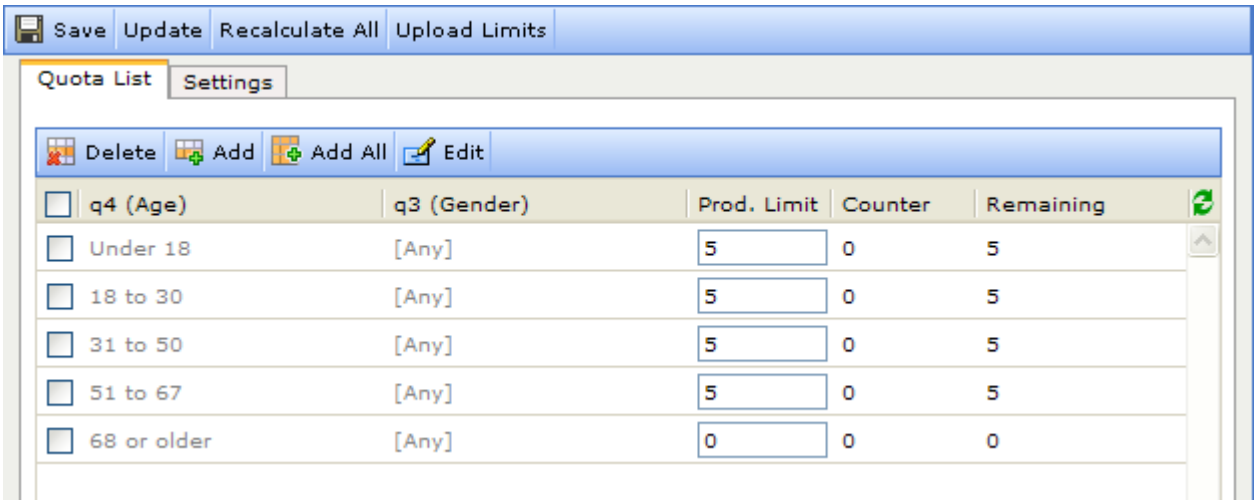


Figure 390 Example of a List mode table

1. To add a row to the list, click **Add**.

   A new row appears at the bottom of the list, containing a cell for each column in the table.



Figure 391 A new row is added to the list

2. Click the down-arrow beside the first field.

   A drop-down list opens that contains all the answer options available for the question. In this case, as the column contains the Age question, the answer options are the various age ranges.

3. Select the desired option from the list.

   In addition to the question's answer options, the **Any** option is also available. Use **Any** to define quota targets for subtotals and totals. For example, if **Any** is selected for the Age question, then the value specified will be the quota for the total of all the age groups.

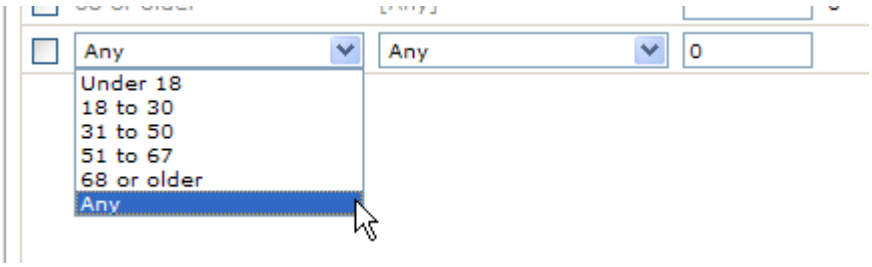
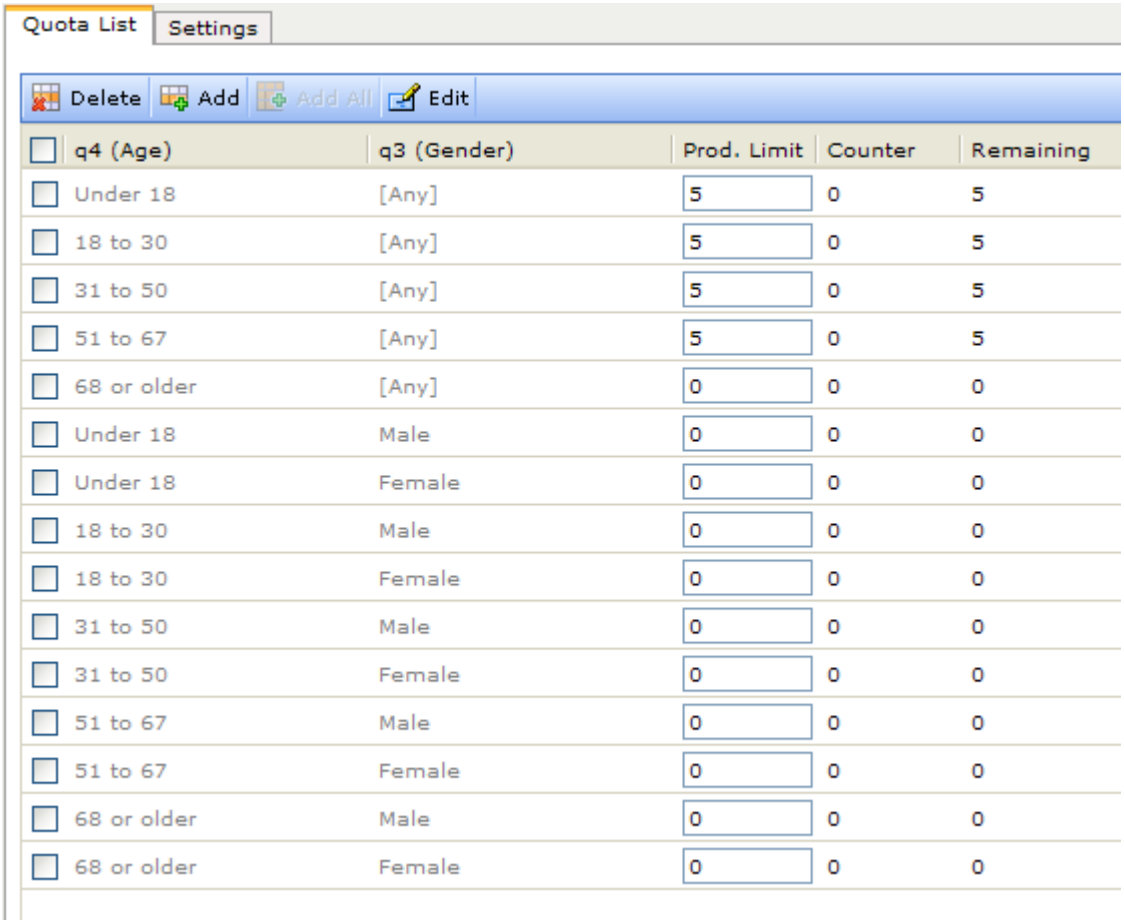


Figure 392 Selecting Any for the Age question

4. Make the appropriate selections for all the fields in the row.
5. To define the values, merely type the values into the appropriate cells.
6. Save the changes.

You can add all the possible quota options to the table in one operation. To do this click **Add All**. The number of quota rows that will be required is then calculated. If that number is above the server limit (default is 1000), then the combinations will not be displayed. If the number is within the limit, then all possible quota options are added to the table.



q4 (Age)	q3 (Gender)	Prod. Limit	Counter	Remaining
Under 18	[Any]	5	0	5
18 to 30	[Any]	5	0	5
31 to 50	[Any]	5	0	5
51 to 67	[Any]	5	0	5
68 or older	[Any]	0	0	0
Under 18	Male	0	0	0
Under 18	Female	0	0	0
18 to 30	Male	0	0	0
18 to 30	Female	0	0	0
31 to 50	Male	0	0	0
31 to 50	Female	0	0	0
51 to 67	Male	0	0	0
51 to 67	Female	0	0	0
68 or older	Male	0	0	0
68 or older	Female	0	0	0

Figure 393 Example of the table after Add All is clicked

7. When you add rows to the table, either individually or by clicking **Add All**, and save the changes, you must then update the quota definition in the database. To do this, click **Update**.

10.2.3. Global Quotas

A quota that does not contain any forms can be used to define a global quota. A global quota is an overall target for the number of completes, irrespective of the respondents' answers on any particular questions. So for example if you want to end the survey after reaching 200 completes, and don't have specific targets for different sub samples, you can set up a global quota.

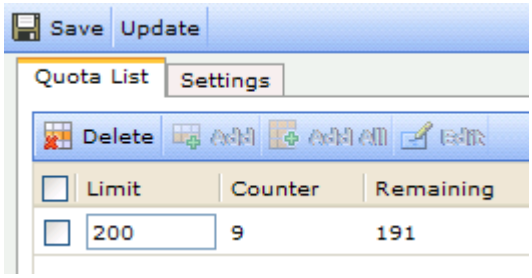
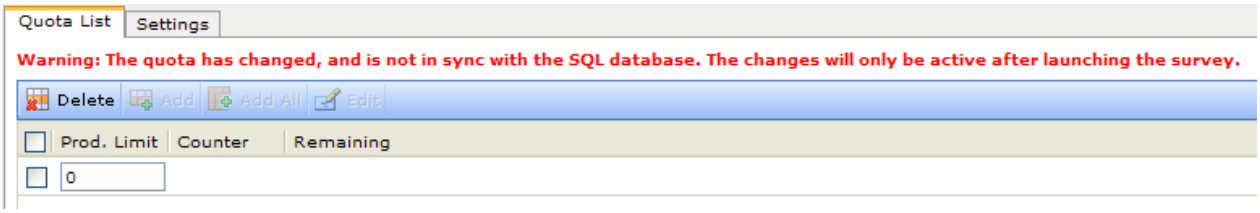


Figure 394 Global Quota

1. Drag a Quota object from the New Objects toolbox and drop it into the **Quotas** folder, or right-click the **Quotas** folder and select **Insert Quota**.
2. Right-click on the new quota object and select **Edit**, or double-click on it, to open the Quota Details page.

   An "empty" quota is displayed.
3. Click **Add**.

   A row is added to the table.



4. Type the total number of replies you want to receive, into the **Prod.Limit** field.
5. Save the changes.
6. Launch the survey to update the database.

10.3. The Quota Wizard

In the Survey Designer, a Quota wizard is available for Single, Multi and Grid questions. This wizard allows you to create quota objects quickly and easily, based on the selected question. The wizard can generate limits and create a condition with a stop/quota full node after the last selected question. Note that you can create quotas for several questions simultaneously by holding down the **CTRL** key on your keyboard while selecting the questions.

To access this:

1. Right-click on a question and select **Quota Wizard** from the drop-down menu.

   The Quota Wizard overlay opens.

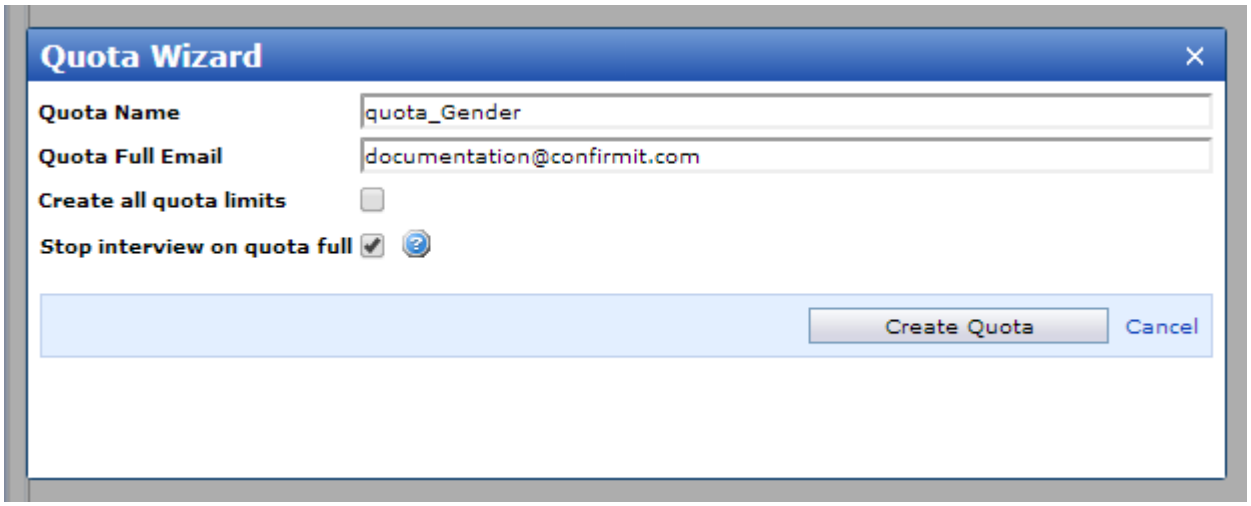


Figure 395 The first page of the quota wizard

- **Quota name -** the quota will be named by default as "quota_<question name>". Edit the quota name as necessary.
- **Quota full email -** the address to which the "quota full" email will be sent is by default the address of the currently logged on user (your address). Edit this as necessary (see Email Alert on Full Quota on page 384 for more information).
- **Create all quota limits -** if you wish to create quota limits for all options now, check the box (see Changing Quotas and Quota Limits on page 376 for more information).
- **Stop interview on quota full -** when this is option is enabled the wizard will add a condition node to the survey immediately after the last question used as part of the quota. The condition node will use the qf() function to check if the quota is full, and if it is the interview will stop. If this option is not checked, the interview will continue even if the quota is full (this can be useful if the quota is being used as a counter) (see Terminating the Interview for Respondents when Quota is Full on page 384 for more information).

2. Click **Create Quota**.

The quota is created and added to the Quotas folder in the questionnaire tree. The Quota Details page opens to enable you to add the limits as required. If you have checked the Create all quota limits box then the limits list will be waiting for you; if you haven't checked the box the you can now add the limits list manually. If you have checked the Stop interview on quota full box then the condition node is added to the appropriate place in the questionnaire tree.

10.4. Changing Quotas and Quota Limits

A quota must be set up in the survey database for it to count the number of completed interviews in the different quota cells. If a quota has not been compiled, or has been changed since it was last compiled, a warning will be displayed telling you to launch the survey.

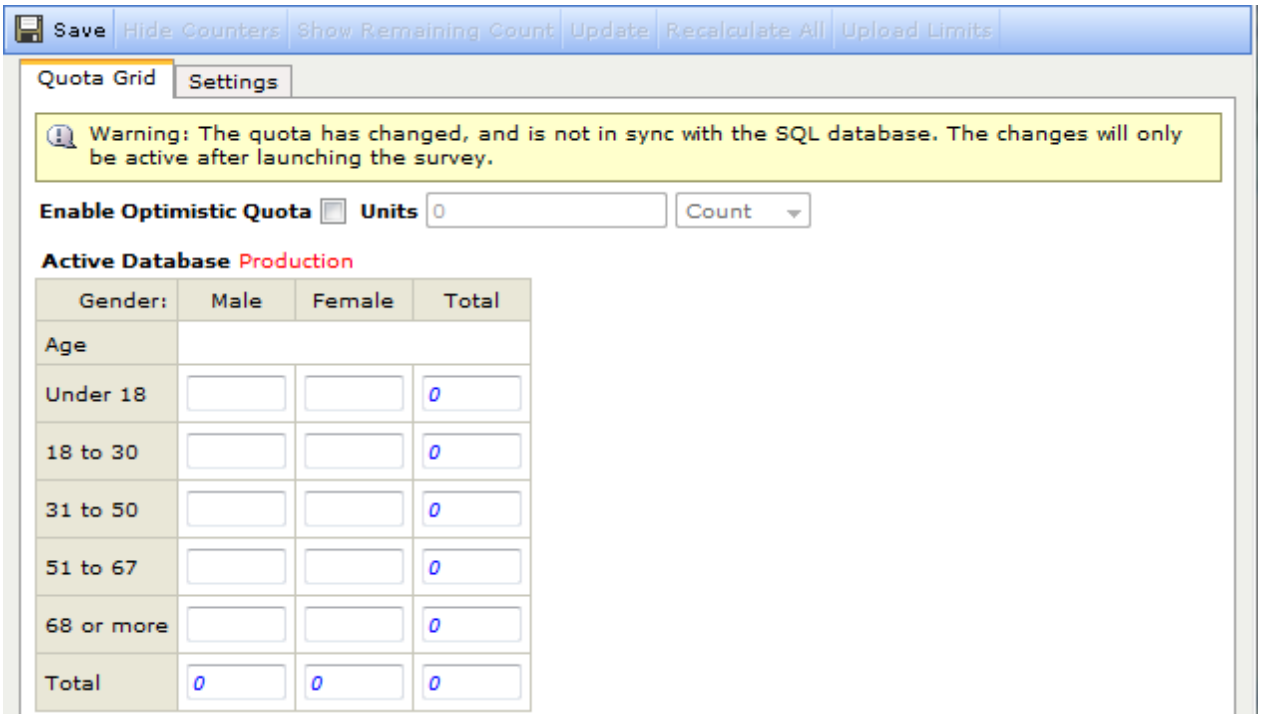


Figure 396 Uncompiled quota warning

Once a quota counter is compiled to the interview environment, the interview engine normally increments the quota counter every time a new interview is completed. Optimistic quotas can be set up whereby Confirmit increments the count before the survey is completed (see Optimistic Quotas on page 378 for more information).

Note: You can set up different quota limits for the Test and Production databases. This allows you for example to test the survey using a reduced number of respondents to save time, whilst setting the "full" number of respondents for the Production database as you are building the survey. To switch between databases, use the database selector towards the lower-right corner of the Confirmit window.

Note: A supervisor may need to view and modify the quota targets without needing to edit the survey questions. A special permission is available under the Admin menu to enable this. Refer to the Administrator manual for further details.

If you make changes to the limits in an existing, compiled quota (adding, removing or changing a limit), you must first save your changes. Then you must click the **Update** button to update the quota in the test or production environment, depending on the database that is active in the drop-down at the bottom of the page.

This allows you for example to test the new quota limits before updating them to the production environment. A warning will be displayed when there are changes in the quota limits that have not been updated in the database. The cells where the limits are not in sync will be highlighted with a gray background.

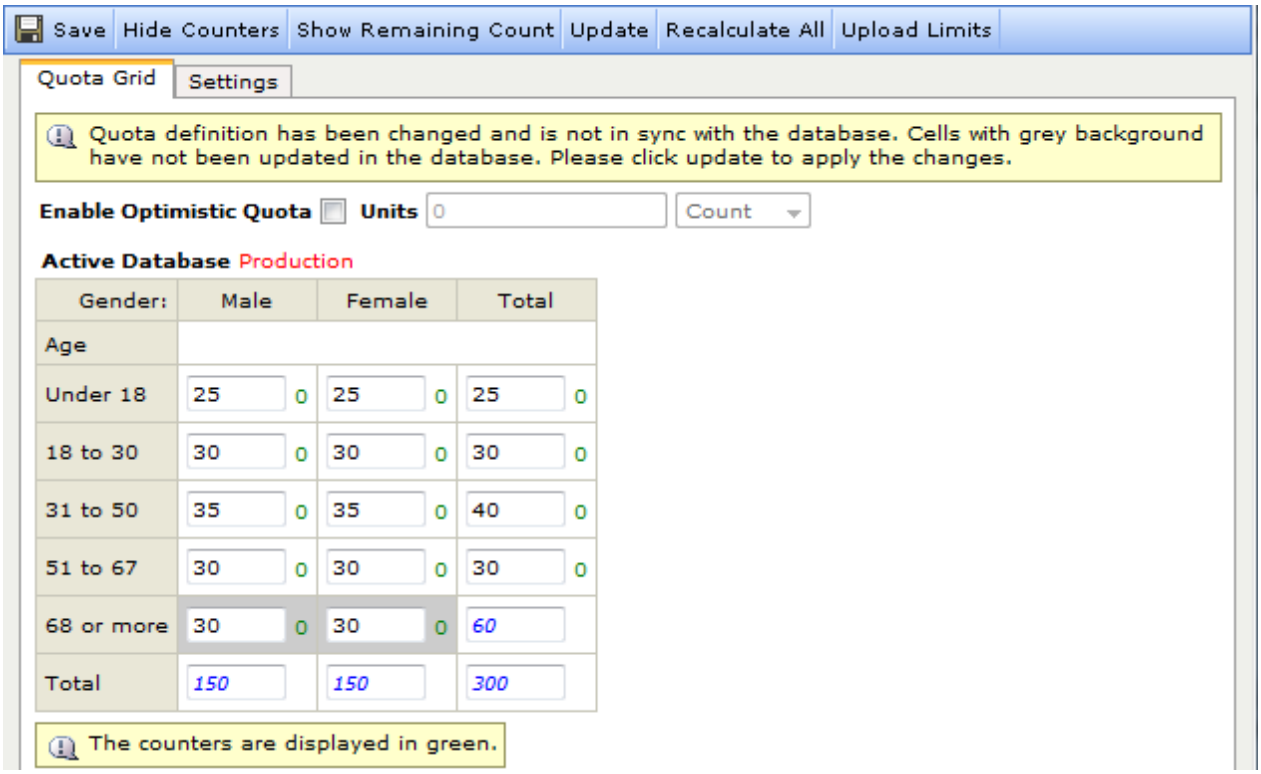


Figure 397 Changed Limits

Note: When updating quotas, the quota counts are recalculated in addition to the quota definition being updated in the database. If the number of responses is very large and the quota comprises many cells, then this may be a very time-consuming process. Such "complete" updates are only necessary if responses are changed or removed in the survey data editor or responses are added or updated through data imports. You therefore have the option to choose between updating only new quota cells or updating all quota cells. The latter update will be performed as a task.

10.5. Optimistic Quotas

As stated in the introduction to this chapter (see Quotas on page 356 for more information), you can set quotas to specify the number of responses you would like to receive for different sub-samples or target groups, or to limit the total number of responses for the overall survey. The quota count is incremented when the respondent completes the survey. However, as quotas are often based on questions placed early in the survey, additional respondents can have passed the quota question before the respondent who triggers the quota limit has reached the end. In a long interview, this can allow for considerable over-representation of the quotas. On the other hand, if the quotas prevented any further respondents from passing from the moment the quota was achieved, respondents abandoning the interview before completing would cause the quotas to be under-represented. The Optimistic Quota functionality therefore enables a preliminary incrementation of the quota count immediately a respondent has answered the appropriate question, but allows a preset "maximum overshoot" to cover for eventual non-completes. The preliminary quota count can later be decremented in the event the respondent abandons the survey before completion. This thereby allows tighter control over the number of respondents who are allowed to participate in an interview once the quota that the respondent falls into has been achieved.

10.5.1. Optimistic Quota Functionality

Optimistic Quota is a quota-level option and functions as follows:

If Optimistic Quota is enabled for a quota, when a respondent answers the question, Confirmit first checks the answer(s) against the standard quota. If that quota is not already full pessimistically (that is, not enough respondents have yet completed the survey) then Confirmit checks further to see if the quota is "optimistically" full, that is, the previous respondent to answer that question filled the optimistic quota. If the optimistic quota is also not yet full, then its counter is incremented and the respondent is allowed to continue with the survey. This state, where the respondent has passed through the question but has not yet completed the survey and is therefore still "live", is termed "In Progress". If the optimistic quota is full however, then the predefined "quota full" procedure is run for that respondent (see Terminating the Interview for Respondents when Quota is Full on page 384 for more information). When the respondent completes the survey, the "normal" quota counter is incremented, and the In Progress counter is decremented. The specified quotas, totals and current counts can be viewed in the Quota Details page in the List mode.

If a respondent makes no changes to the survey for longer than a preset period (the timeout), then he/she is assumed to have left the survey. The In Progress counter is then decremented for that respondent to allow another respondent through. If the respondent later re-enters the interview, the In Progress count is immediately re-incremented and the respondent is allowed to continue. The default setting for this timeout period is 5 minutes, but this can be changed at the survey, company or site level on the Survey Settings > General Options tab.

An In Progress counter is automatically incremented:

- When all the questions for that quota have been answered.
- When a respondent returns to an incomplete interview after it was previously decremented (i.e. the respondent answered the question thereby incrementing the counter, then left the interview for longer than the preset timeout limit so the counter was then decremented).

An In Progress counter is decremented (if it was previously incremented):

- If any question in the specific quota command becomes unrecorded (the respondent deletes the answer).
- If the specified timeout period of respondent inactivity is exceeded (i.e. the respondent leaves the interview for more than a specified time).
- If the interview is successfully completed (the standard quota counter is then incremented in its place).

The number of In Progress counts that are allowed over and above the standard quota limits is preset individually for each quota.

The following restrictions and limits apply when using optimistic quotas:

- The functionality is available only for CATI/WEB surveys using the Optimized database format.
- A quota can consist of single-type questions only (the quota can include several questions, but they must all the singles).
- No "Any" cells can be included in the quota command (all cells must have explicit targets).
- If you launch a survey with quota definition changes, this will force all In Progress counts to be reset. In the event respondents are in the survey when it is launched, the Optimistic Quotas will be set as appropriate immediately the respondents submit their next answer.
- It is not currently possible to use separate quota-based functions to access In Progress counts.

10.5.2. How to Set Up Optimistic Quotas

To enable the Optimistic Quota functionality for a quota:

1. In the Questionnaire Tree, go to the **Quotas** folder and double-click on the appropriate quota.

   The Quota Details page opens for that quota.

2. In the Quota Grid or Quota List tab, check the Enable Optimistic Quota box .
3. Set the Unit value to specify the maximum number or percentage of Optimistic respondents that are to be allowed in the survey once the "standard" quota is achieved.
4. Click the down-arrow and select from the drop-down the type of unit to be used.

Count gives a specific value over and above the specified quota. For example, if the quota for a question is set to 50, and the Units fields are set to 5 and Count, then the Optimistic Total Limit will be 50 + 5 = 55.

Percent gives the nearest whole number above the specified percentage of the quota. For example, if the quota for a question is set to 50, and the Units fields are set to 5 and Percent, then the Optimistic Total Count will be 50 + 5% = 52.5, rounded up to 53.

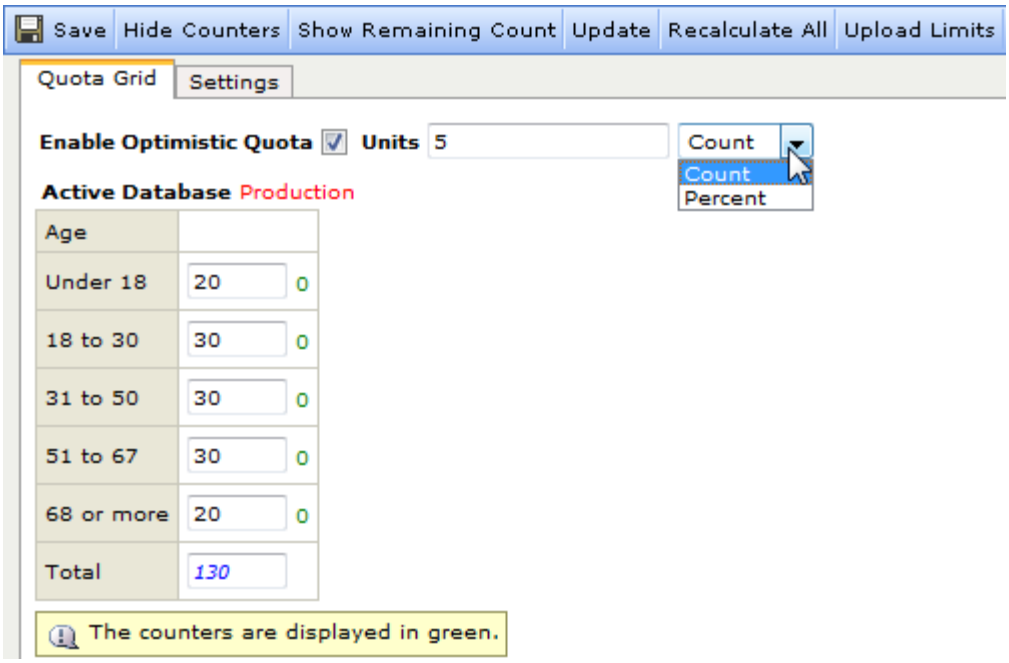


Figure 398 Setting an Optimistic Quota

Note the following points:

- A quota using the Optimistic Quotas functionality can consist of single-type questions only (the quota can include several questions, but they must all the singles).
- No "Any" cells can be included in the quota command (all cells must have explicit targets).
- If you launch a survey with quota definition changes, this will force all In Progress counts to be reset. In the event respondents are in the survey when it is launched, the Optimistic Quotas will be set as appropriate immediately the respondents submit their next answer.
- It is not currently possible to use separate quota-based functions to access In Progress counts.

In Progress counts are only visible in List mode; not Grid mode.

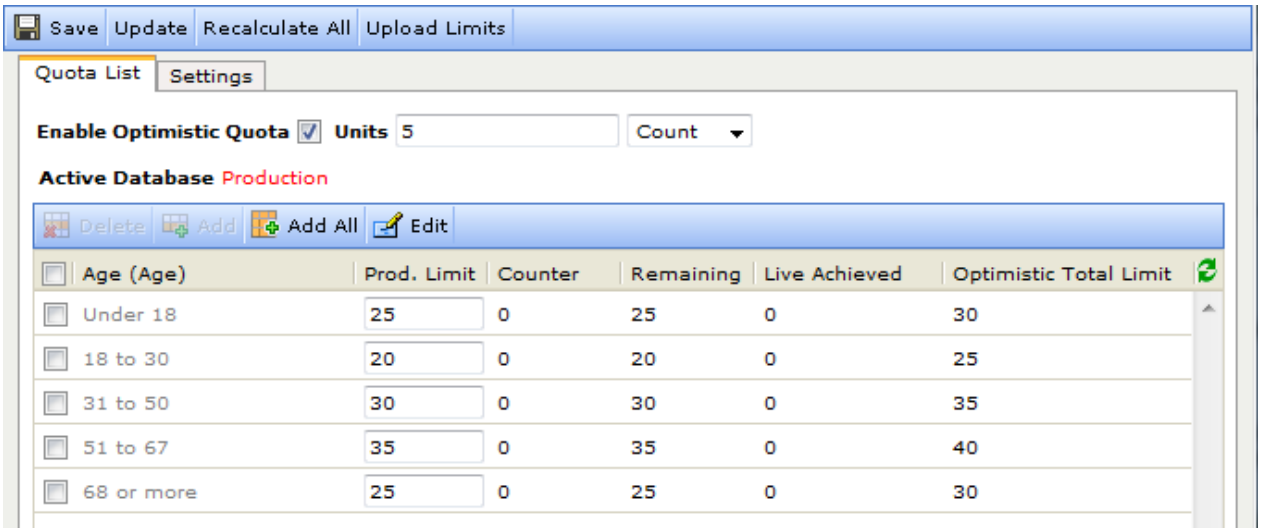


Figure 399 The Quota Details page in List mode showing the Optimistic Total Limits

10.6. Uploading Quota Limits

Quota limits can be imported into a quota by using a tab-separated text file. The text file must have a row for the column headers, then one row for each quota limit.

- The first row must contain the column headers. These must be the ids of the variables in the quota (the **question id** for single questions, **question id +_+ code** for each element in a multi or grid), and for the limits column the header must be **_limit**.
- Then there must be a row for each quota cell. For each single or grid variable in the quota cell, you specify the code of the answer or [any] for Any response. For elements of a multi you can use **c** for Chosen and **nc** for Not Chosen in addition to **[any]** or **a** for Any,

Examples:

1. If you have a Gender question (single) with ID "**q1**" and variables Male and Female with codes **1** and **2** respectively, the quota upload file could look as follows:

q1	_limit
1	80
2	100

Here, a limit of 80 complete responses is defined for male respondents and 100 for female.

2. If you have a Car question (multi) with ID "**q3**" and answer options **Volvo**, **Saab**, **BMW**, **Audi**, and **Ferrari** with the codes 1, 2, 3, 4 and 5 respectively, the quota upload file could look as follows:

_limit	q3_1	q3_2	q3_3	q3_4	q3_5
50	[any]	[any]	c	[any]	[any]

Here a limit of 50 responses is defined for the respondents who choose BMW. (For multi questions, **a** could be used instead of **[any**] to indicate Any response.)

3. If you have a Car Quality Ranking question with ID "**q4**", with the variables **Speed**, **Safety**, **Sunroof** and **Color** with the codes 1, 2, 3 and 4 respectively, and a Scale of **Poor 1, 2, 3, 4, Excellent 5** with corresponding codes, the quota upload file could look as follows:

q4_1	q4_2	q4_3	q4_4	_limit
1	1	1	5	50
1	1	2	5	50
1	2	1	5	50

Here, for example in the first row, a limit of 50 responses is defined for the respondents who rate Speed, Safety, and Sunroof as Poor, and Color as Excellent.

4. If the quota is to be based on two questions, Age and Gender (singles), with the following answer categories:

   Age:
   Code 1 – under 18
   Code 2 – 18-30
   Code 3 – 31-60
   Code 4 – 61+

   Gender:
   Code 1 – Male
   Code 2 – Female

   And say you wanted to have a quota limit of 20 on each unique combination, then the quota upload file would be:

Gender	Age	_limit
1	1	20
1	2	20
1	3	20
1	4	20
2	1	20
2	2	20
2	3	20
2	4	20

To upload the file:

1. When you have created and saved the upload file, go to the Quota Details page for the quota and click the **Upload Limits** button.

   The Upload Quota overlay opens.

Note: The Upload Limits button only becomes active once the survey has been launched.

2. Click **Browse**, then find and select the file you want to upload.

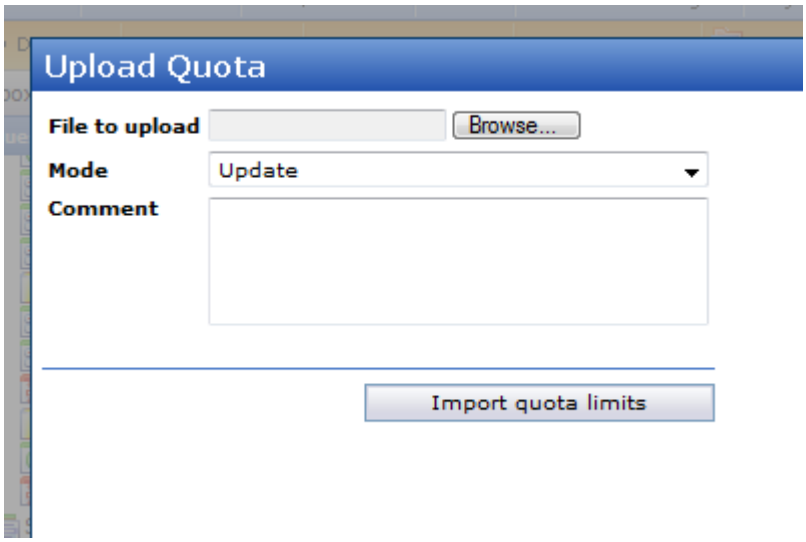


Figure 400 Selecting the file to upload

3. Select the Mode you wish to use.
    - **Update**- (default) existing quota cells will be updated and new quota cells will be added.
    - **Append** - existing quota cells will not be updated and new quota cells will be added.
4. Click Import Quota Limits.

    The Quota upload task commences. On completion, click **OK** to return to the Quota Details page. The quota will be updated with the values from the file. In the event of a problem, the appropriate message will be displayed.

10.7. Updating Counters

If you need to change some quota limits or have added some new quota cells, it will be necessary to update the quotas. To do this:

1. Click the **Update** button on the quota details screen.

Note: The Update button only becomes active once the survey has been launched.

Update only updates limits that are newly created or changed in the current quota. This will therefore be considerably faster than **Recalculate All**, which updates all the quotas in the survey whether or not they have been changed. Note that the system will not display a warning if the quotas have been changed or are inconsistent.

When an interview is completed the first time, quota counters are incremented by 1. Only counters corresponding with the respondent's answers are incremented. If a respondent re-enters an already-completed interview, the quota counter is not modified. The quota count will not be decremented if a respondent changes status from Complete to another status.

The quota is incremented when the respondent is given the status *Complete*, either when he/she reaches the end of the survey, a stop node with *Complete* status or if a **SetStatus('complete')** function is used. If you put the **SetStatus('complete')** command before the respondent has answered the questions on which the quotas are based, you will have to update the counter manually.

10.8. Recalculating All

Click **Recalculate All** if you wish to update all quota limits and recalculate all counters. Note however that depending on the number of responses and the size of the quota, this action may take a considerable time to process. You are therefore recommended to use **Update** if you only need to update changed quota limits or have added new quota cells. Use **Recalculate All** if the quota counters are inconsistent and must be updated due to for example data imports, deletions or changes to the responses in the Survey Data Editor.

When you click **Recalculate All**, a warning message appears. Click **OK** to continue or **Cancel** to abort the process.

Note: The Recalculate All button only becomes active once the survey has been launched.

10.9. Email Alert on Full Quota

If you wish to be notified every time a quota cell is full (reaches its target), enter an email address on the Settings tab. If you would like the alerts to be sent to several email addresses, enter all in the "Quota full email" field, separated by semi colon.

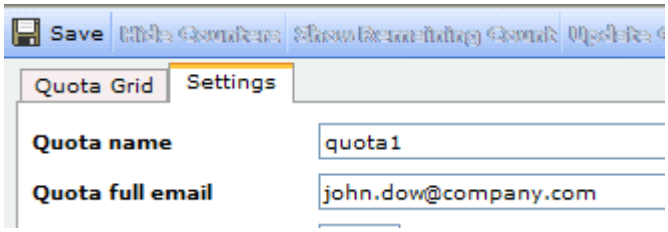


Figure 401 Setting up the quota full email

The quota full email will be sent when the **qf** function (see Terminating the Interview for Respondents when Quota is Full on page 384 for more information) returns **True** for the first time for a quota cell. This means the email will be sent only the first time a respondent is stopped because of that quota cell having reached its limit - subsequent alerts will not be sent for that particular quota cell.

10.10. Terminating the Interview for Respondents when Quota is Full

The quota system itself is merely a framework for registering how many completed interviews are in the different quota cells. If you wish to use the quotas to terminate the interview for respondents who fall into quotas that are full, then you must include a check in the questionnaire after the questions on which the quota is based.

Use the **qf("quotaname")** function to terminate the interview for respondents who fall into quotas that are full. The **qf** function returns **true** if the specified quota is full in the cell corresponding to the respondent's answers to the quota question.

As shown in the figure below, you can stop the survey for the respondents in a full quota by using a condition and a stop node with status "Quota full".

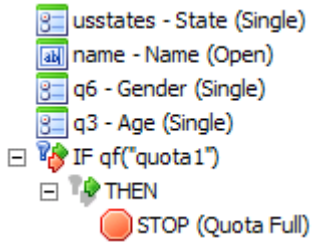


Figure 402 Quota Condition

The notification email for a full quota is triggered from the **qf('quotaname')** function. The notification email is not sent when the respondent filling the quota completes (the last to respond before the quota is full), but when the first respondent reaches the **qf('quotaname')** function when the quota is full.

Note: The notification email is only sent once. You will not receive an additional email notification if you increase the quota after it has been full once.

As the quota count is performed when the respondent is set to 'complete', normally at the end of the survey, and the quota check (the **qf('quotaname')** function) is put at the beginning of the survey, there is a potential risk that you may have quota counts that slightly exceed the limit. This will be due to respondents already having progressed past the quota check when the quota is set to full. If the survey is long and/or there are many respondents in the survey simultaneously, the probability that the quota will be exceeded will be higher.

Example: The quota limit is 100. Respondent 100 enters the survey, is put in the quota group, reaches the condition and gets by the check, since the count is 99. But before he/she reaches the end of the survey, respondent 101 and 102 enter. As the quota is still open, they are also allowed to get by the check. Respondent 100 then completes and the quota count meets the limit. The next respondent, respondent 103, enters and reaches the qf('quotaname') check, which now is full. The qf() function evaluates to TRUE and the email notification is sent. Respondents 101 and 102 are allowed to complete and the quota count will be higher than the limit (102 vs. 100). If they leave the survey, however, but are allowed to reenter, they will be prevented from moving on since the quota now is full. Their previous answers will still be in the collected data.

If a Redirect(url) function is used it is important that the respondent is put in the quota group before the **SetStatus('complete');** function. Otherwise, the quota count will not be updated, unless by clicking the Update counter button in the quota in the questionnaire.

Important
You should not allow respondents to re-enter a completed interview and modify their responses when you are running a survey with quotas.

Such a re-entry might occur after the quota is full, in which case respondents that had already completed would then be stopped by the quota check. If you allow respondents that have completed the interviews to re-enter, you should combine the quota check with a check to ensure that their status isn't already Complete:

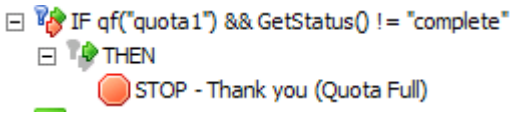


Figure 403 Quota Condition with check on Interview Status

10.11. Deleting Quotas

To delete a quota from the database, highlight the quota, press **Delete**, and then re-launch the survey.

Note: It is not possible to delete a question from a quota when operating in a survey's Test database mode; question deletion from a quota can only be performed when working in the Production mode. If an attempt is made to delete a question from a quota in the Test mode, an error message will be displayed stating that the Test mode can only be used for editing test limits.

11. Survey Router

Note: The Survey Router functionality is a Confirmit add-on and is subject to payment.

Imagine the situation: A respondent or panelist is participating in a survey, but after answering a few questions he/she is screened because the quota for that survey is full for respondents with their profile. This would be irritating for the respondent; they have already invested some time and effort in the survey, logging in and answering the preliminary questions, and (if a panelist) they want to earn their credits. And it is an undesirable situation for you as the survey author; you have a willing respondent available but you cannot make use of them. Well now you can.

Additionally, a survey router could be used in a “global screener” type scenario, often used for river sampling techniques, whereby respondents all begin in a common survey – the “Global screener”. Then based on the answers given to the screening questions, the respondent can be routed to an appropriate survey.

The Survey Router functionality enables you to gather surveys in a group, and if the situation arises where a respondent cannot complete the survey he/she is initially allocated to (due to screening or quotas), then the respondent can be moved seamlessly onto another survey in the group.

Any number of router groups can be created within a company, and each group can include up to 100 surveys (this value is configurable for On-Premise license holders). However a survey can only be linked to one router group at a time.

A number of points must be noted:

1. Only surveys using the Optimized database format can be registered in a survey router.
2. Survey routing is only available for Web channel surveys; survey routing is not applicable in CAPI and CATI interviewing channels. If the survey does not have the Web channel active, and is registered with a router, the survey launch will fail.
3. When router configuration is changed (new question(s) are added), affected surveys are moved to a state "Activation pending", so re-launch of ALL surveys will be required.
4. TEST databases are not supported for routing between surveys.

For true "seamless" re-routing, where the respondent does not notice he has been transferred to a different survey unless he is told, you will need to ensure that the original and target surveys use the same layout. In most cases it would probably be ethically correct to inform the respondent that he/she is being re-routed anyway, but maintaining the "look and feel" across the surveys would reduce the transferal experience to virtually nothing.

Each respondent must have a unique identifier. This is used to keep track of the respondent and select appropriate surveys. The identifier might be typed in interactively by the respondent, or it could for example be the PanelistID which can be hidden information taken automatically from the panelist's profile. The identifier must be stored in the username column in the respondent table of the source survey.

When a survey is allocated to a "Routing group", the survey author can incorporate a workflow whereby a check can be performed, for example if a respondent is screened from the survey, to see if he/she can be re-routed. The router checks to ensure the "target" survey is available (not closed) and that quotas specified corresponding to the respondent's profile are not already full, before transferring them over. Any information that the respondent has already supplied before being re-routed, that can be used in the new survey, can be copied across to the new survey so the respondent doesn't have to "start afresh".

Once a respondent has been re-routed from the original survey to the target survey, he/she cannot return to the original survey. If the target survey allows the use of the **Back** button, it will only function back to the point at which the respondent entered the target survey; thereafter the button will be inactive. Any answers provided by the respondent before he/she is re-routed cannot therefore be changed after re-routing (by the respondent going back to the original survey).

If the respondent was initially invited to the survey via an email invitation and was then routed to a different survey, any subsequent clicking on the initial link will direct the respondent automatically to the routed-to survey.

It is possible to route a respondent more than once (daisy chaining of surveys), for example he/she starts in survey A, is routed to B, then routed to C etc. However if this is used and the respondent initially accessed the survey via a URL (email invitation), then the automatic redirection to the latest routed-to survey will only be valid for up to five surveys in a routing chain (this value is configurable for On-Premise license holders).

If a survey is linked to a router group, then a link to that group is available towards the bottom of the Survey Overview page.

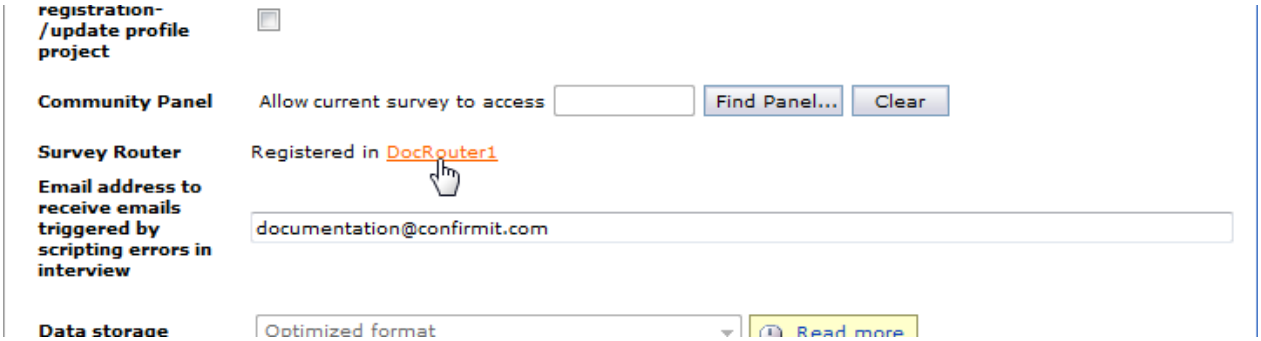


Figure 404 Example of a Survey Router link on a survey's Overview page

Click this link to go to the Group Details page for the group (see Group Details Overlay General Tab on page 393 for more information).

11.1. Accessing Survey Router

Go to the **Home > Survey Routers** menu to open the Survey Routers page.

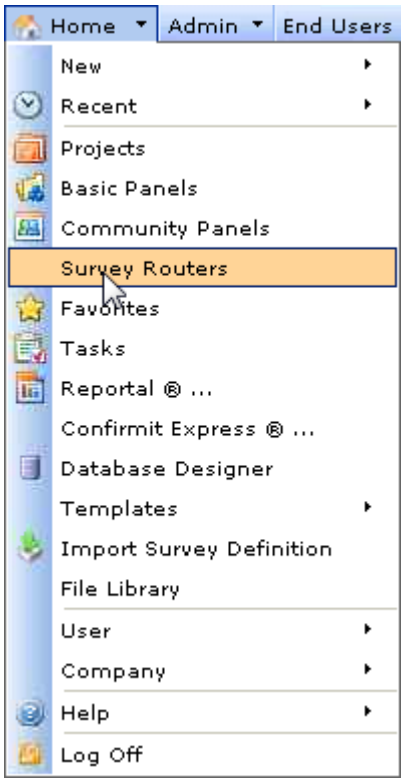


Figure 405 The Home > Survey Routers menu command

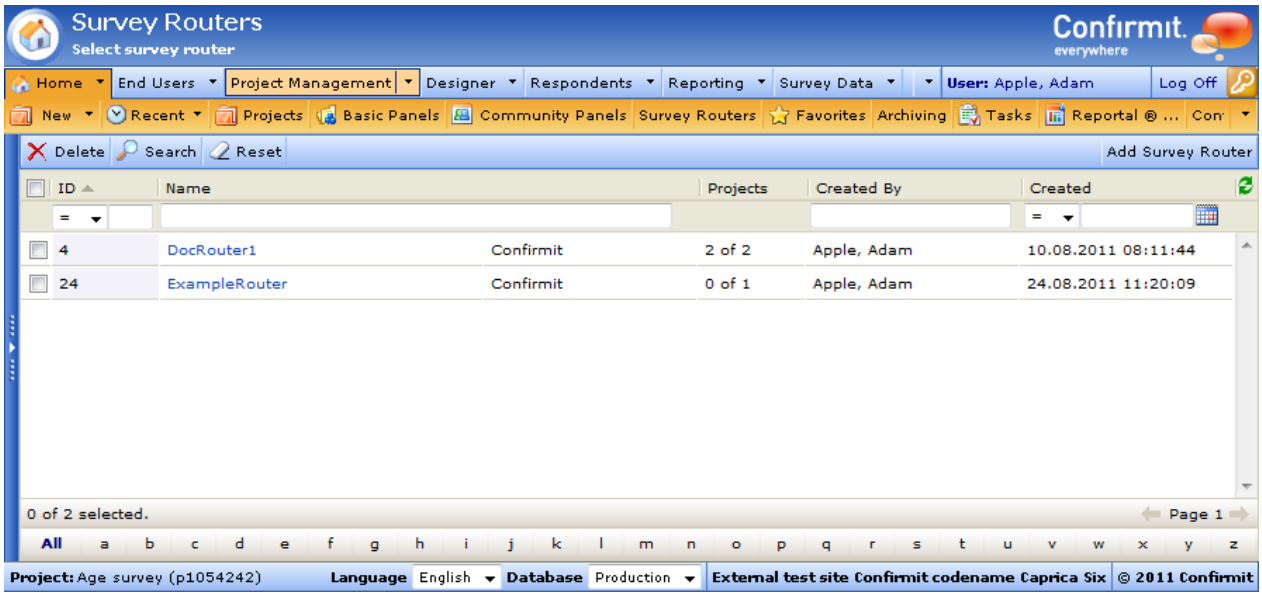


Figure 406 The Survey Routers page

This page lists all the router groups to which you have access. The columns are searchable and can be sorted.

- **ID -** the router group's identification number.
- **Name -** The name of the routing group. Note that this is a link to the Router Group page for the group.
- **Company -** the name of the company that has created the group.
- **Surveys -** the number of active surveys included in the group (surveys that can be used), and the total number of surveys included.
- **Created by -** the name of the user who has created the group.
- **Created -** the date and time the group was created.

Click on the blue Name link for a router group to open the group details overlay for that group (see Group Details Overlay General Tab on page 393 for more information).

11.2. How to Create a Survey Router Group

Any number of router groups can be created, and a group can include up to 100 surveys. However a survey can only be linked to one router group at a time. To create a new group:

1. When in the Survey Routers page, click the **Add Survey Router** button located in the upper-right corner of the page.

   The New Survey Router overlay opens.

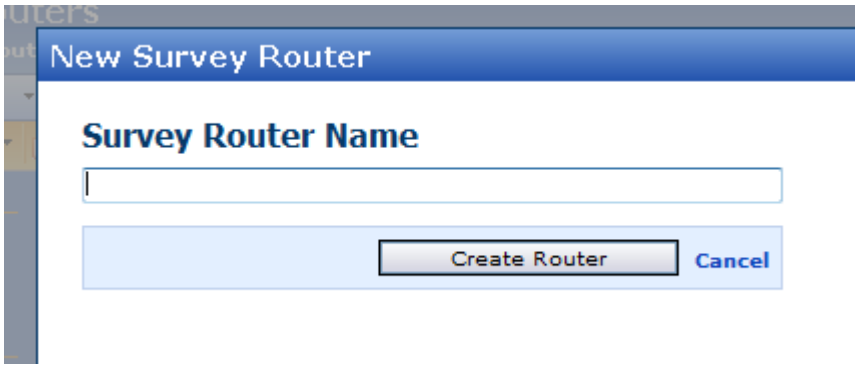


Figure 407 The New Survey Router overlay

2. Type a name for your new router group into the text field, then click **Create Router**.

   The router group is created, and the group details overlay opens at the General tab (see Group Details Overlay General Tab on page 393 for more information).

3. Fill in the general details, add surveys to the group (see How to Add a Survey to a Router Group on page 389 for more information), and set permissions (see The Permissions Tab on page 395 for more information) as required.

4. Save the changes.

11.3. How to Add a Survey to a Router Group

Note: To be able to route the respondent to a survey in the routing group the target survey must have been launched as a specific survey type - "Limited survey with external respondent creation". This is defined in Survey Settings > Web options – "Survey type". If this setting is not enabled, attempting to route the respondent to this survey will fail reporting that the URL supplied is invalid. Note that it is not mandatory for all surveys in a routing group to have this option enabled; only surveys that are to be considered to be available for routing to. If you have a global screener or a single open entry point, this option Is not required.

1. Go to the **Home > Survey Routers** menu command.

   The Survey Routers page opens.

2. In the Name column, click on the blue link to open the router you wish to work with.

3. Go to the Surveys tab.

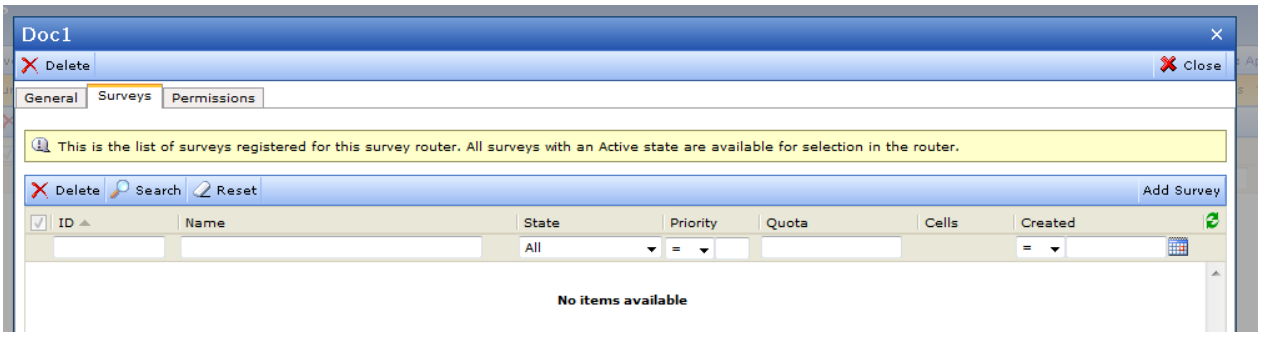


Figure 408 The Surveys tab

4. Click the **Add Survey** button in the upper-right corner of the tab.

   A Select Survey overlay opens listing all the surveys to which you have access.

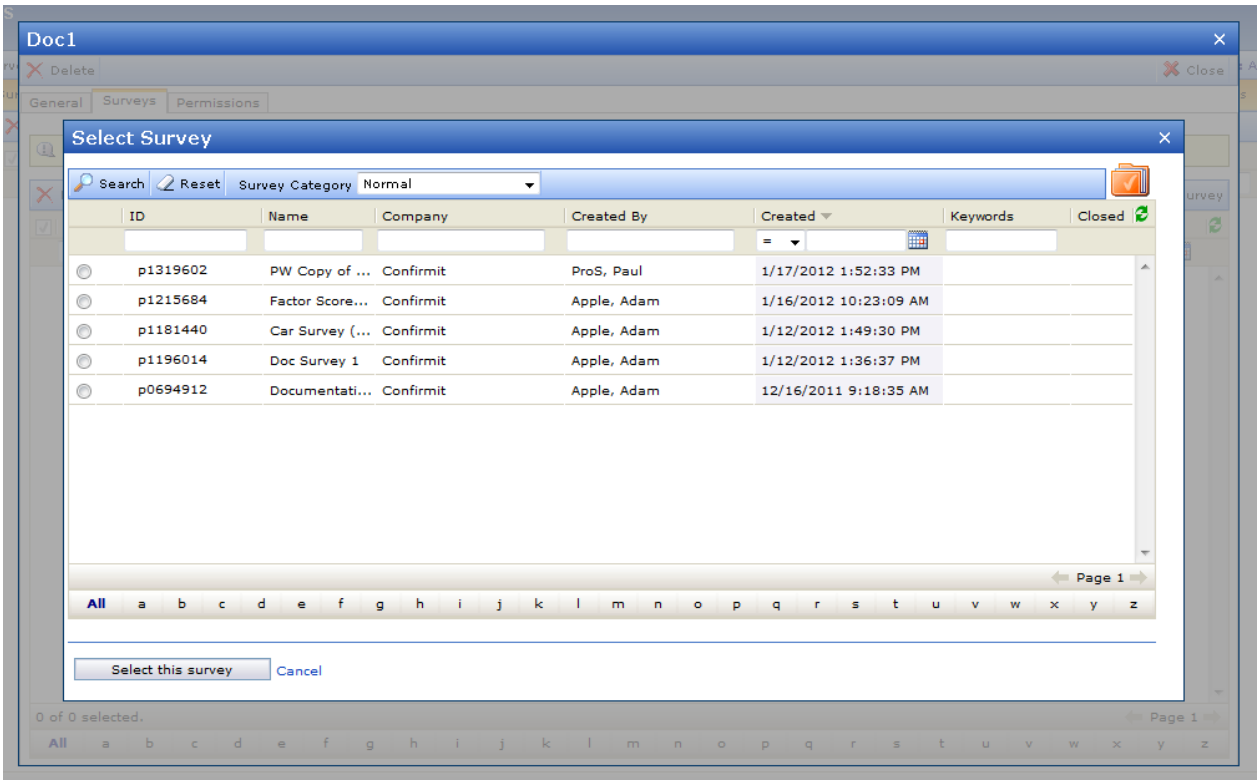


Figure 409 The Select Survey overlay

5. Select a survey from the list and click **Select this survey**.

   The Details overview for the selected survey is displayed. Note that if the survey you select is already included in another router group, Confirmit will not allow you to add it to the current group.

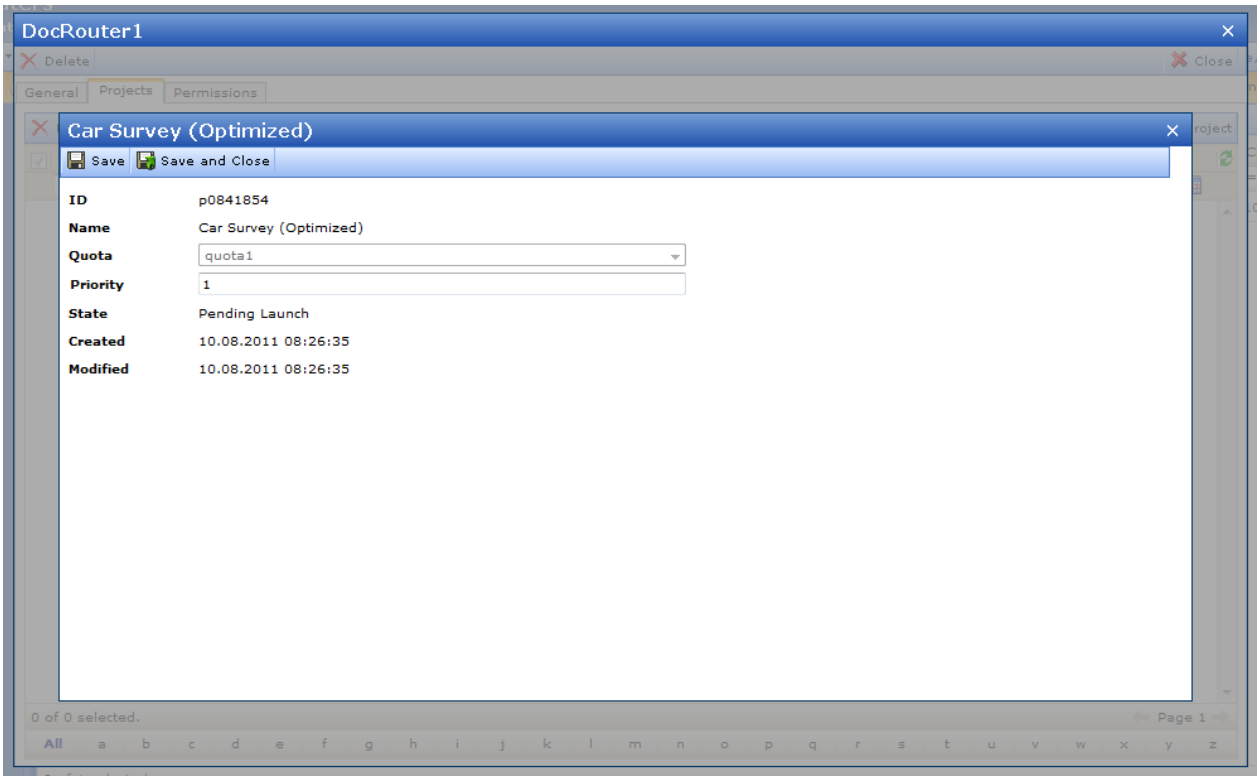


Figure 410 The details overview page for the selected survey

- **Quota -** here you select the quota that is to be used as part of the selection criteria. Note that only one quota can be selected, and once the survey is saved, the quota to be used cannot be changed. If you wish to use a different quota in the survey, you must delete the survey from the group and re-add it. At least one question in this quota must be specified in the list of this survey router's question IDs.

  Note that a survey can have only one quota that is associated with the router. The survey can have other quotas, but they will not contribute towards the router. If a survey is registered with a survey router and a quota is specified, but no questions in the quota are specified as Survey router Question IDs, the survey launch will fail.

- **Priority -** Surveys can be given a priority, where a higher value signifies a higher priority. When the Survey Router is looking to transfer a respondent to a different survey in a group, if a number of surveys in the group have the same selection criteria, then the survey with the highest priority will be selected. If a number of surveys in the group have the same selection criteria and the same priority then one will be selected at random. The priority can be changed at any time. By setting a priority value of 0, the survey is made unavailable for selection for re-routing.

- **State -** this is the current state of the survey. Any survey can be included in a group as long as it is not already included in another group, but only Active surveys will be considered as potential targets for re-routing. The three possible states are:

  - **Pending launch -** the survey is registered, but changes have been made to the questions or quotas that contribute to the router since the survey was last launched. It is therefore temporarily unavailable for selection, but it will become available as soon as it is re-launched.

  - **Active -** the survey is available and can be considered as a potential "target" if a respondent is to be re-routed.

  - **Closed -** the survey is not considered available for re-routing.

6. Save the changes.

   Note that on saving, additional information becomes available on the overlay.

11.4. Quotas in Survey Routing

Quotas comprise a significant part of the algorithm used when selecting which survey a respondent is to be re-routed to. It is therefore possible to access a survey's quota information from the group page. The page provides access to two sets of quota information:

- The number of open quota cells and the total number of quota cells for the survey.
- A link to the quota list.

Note that a survey can have only one quota that is associated with the router. The survey can have other quotas, but they will not contribute towards the router.

If a survey is registered with a survey router and a quota is specified, but no questions in the quota are specified as Survey router Question IDs, the survey launch will fail.

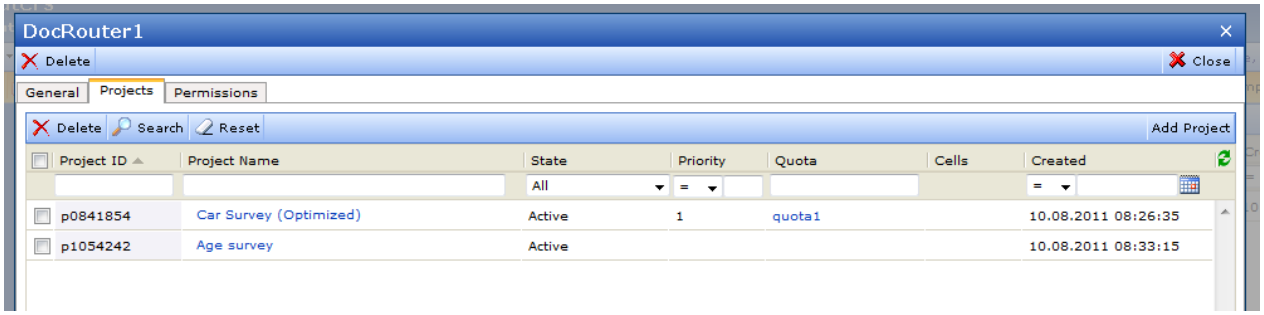


Figure 411 The router group information page showing quota cell information

Click on the blue link in the Quota column to open the Quota List for that quota.

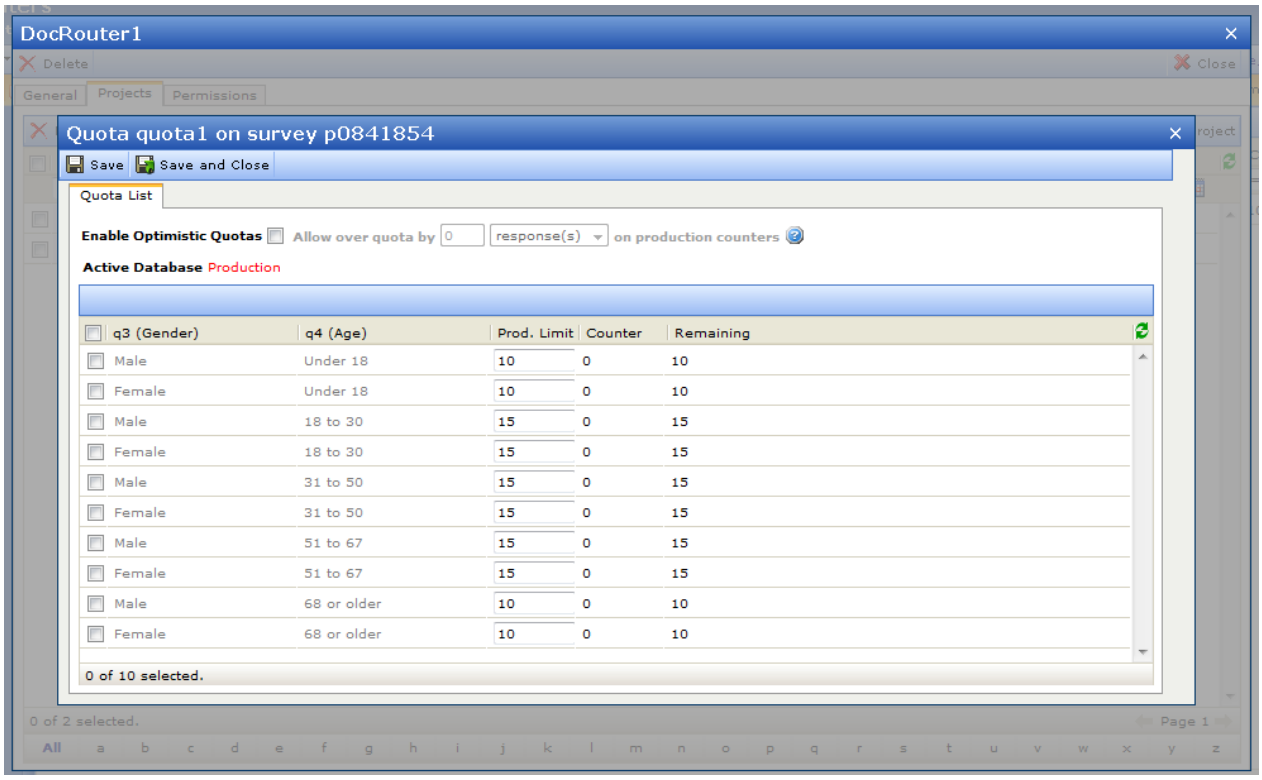


Figure 412 Example of the quota information overlay for a survey

This overlay provides detailed information about the particular quota, and you can change the quota requirements here.

On completion, click **Save** or **Save and Close** to save the changes.

11.5. The Survey Priority

You can assign a priority value, where the highest value has the highest priority, to any survey that has an associated quota.

When the Survey Router is asked to find a survey that a respondent can be routed to, if a number of surveys in the group have the same selection criteria, the available surveys are sorted in order of priority. The survey with the highest priority will then be selected. If a number of surveys in the group have the same selection criteria and the same priority then one will be selected at random.

The default priority value is 1. A value of 0 means this survey is not available for selection in the router.

A survey's priority value can be edited at any time in the Details overview by a user with the appropriate permissions.

Note that surveys that are registered without a quota cannot have a priority value assigned to them because they cannot be considered as available for selection based on available quota cells.

11.6. Group Details Overlay General Tab

The Group Details page opens at the General tab.

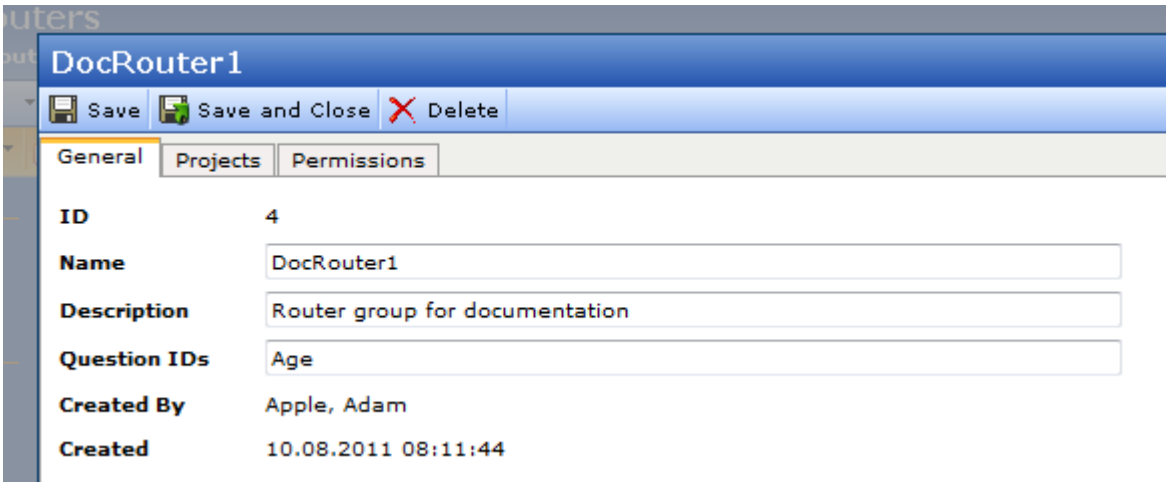


Figure 413 The router's General tab

This tab contains general information about the router group.

- **ID -** the identification number for the router group. This is allocated automatically by Confirmit when the group is created, and it cannot be changed.
- **Name -** the name given to the router group by the user. This would normally be a logical name to provide easy identification of the group. This can be changed by a user with the appropriate permissions.
- **Description -** a descriptive text provided by the user. This can be edited at any time by a user with the appropriate permissions.
- **Question IDs -** at the router level you can define up to 10 questions, based on the QuestionIDs. These questions will then be used as part of the selection criteria when the router is asked for an available survey which the respondent can be transferred to. Type the required variables into the field, separating them with commas. Spaces can be included after the commas, but they are not required as the string will automatically be formatted correctly by the system when it is reloaded.

Click **Save** or **Save and Close** after making any changes.

11.6.1. The Surveys Tab

This tab lists the surveys that are currently included in the selected router group.

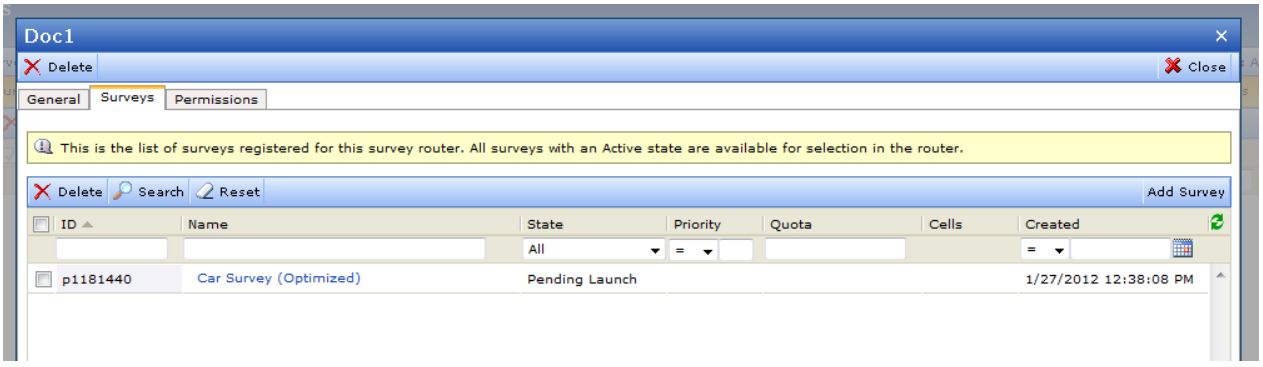


Figure 414 The router's Surveys tab

This tab lists the surveys that are included in the router group. The columns are searchable and can be sorted. Note that a survey's state must be Active for it to be considered as a target survey by the router.

Each survey that is included in the group has a drop-down menu with quick links to a number of useful pages.

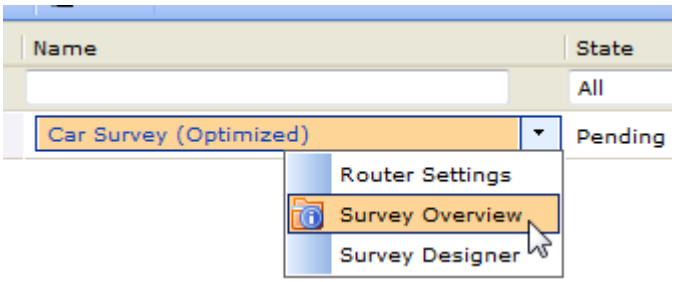


Figure 415 The survey's drop-down menu

The options in this drop-down are:

- **Router Settings -** opens the details overview page for the selected survey (see How to Add a Survey to a Router Group on page 389 for more information).
- **Survey Overview -** opens the Survey Overview page General tab for the survey (see The General Tab on page 174 for more information). Note that you can return directly to the router page by clicking the Survey Router link located towards the bottom of the Survey Overview page..
- **Survey Designer -** opens the Survey Designer page for the survey.

11.6.2. The Permissions Tab

This tab allows you to define the access rights to the routing group for the various users in your organization.

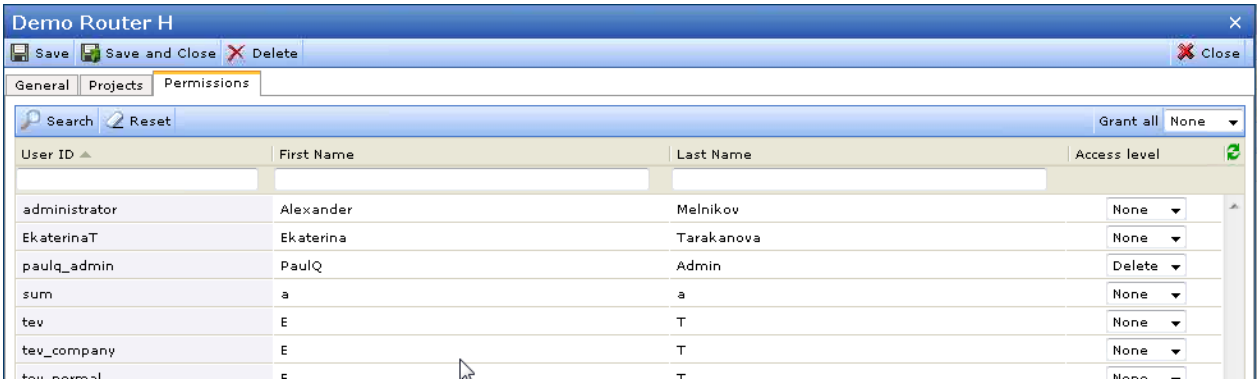


Figure 416 Example of a group's Permissions tab

- **Search -** type criteria into the appropriate column header fields and click Search to display only the users who satisfy the search criteria.
- **Reset -** clears any applied search criteria and presents the entire list.
- **Access level -** click the down-arrow beside a user's field to open a drop-down list of the permissions, then select the appropriate permission for that user. The options are:
    - o **None -** the user does not have access to the survey.
    - o **Read -** the user has only Read permission, i.e. he/she can view the questionnaire and associated reports but is not allowed to add new or delete existing elements in them.
    - o **Write -** the user has Write permission, i.e. he/she is allowed to add questions to the questionnaire and reports.

o **Delete -** the user has Delete permission, i.e. he/she is allowed to work on the questionnaire and reports, and is allowed to delete objects in them.

- **Grant all -** select a permission from the drop-down beside this button and click the button to give that permission to all the currently listed users. Note that if you do not wish to give the selected permission to all users in your company then you must first conduct a search such that only the appropriate users are listed on the page.

11.7. The Survey Router Functions

Two scripting functions are included in Confirmit to assist the user with using the Survey Router functionality:

- GetAvailableSurvey (see GetAvailableSurvey on page 396 for more information).
- RedirectToRouterSurvey (see RedirectToRouterSurvey on page 397 for more information).

11.7.1. GetAvailableSurvey

This script function is used to get a Survey ID that the respondent / panelist could be re-routed to. Here you must supply the key question(s) that you want to be checked by the algorithm. You can supply up to five questions; this value is configurable for On-Premise license holders.

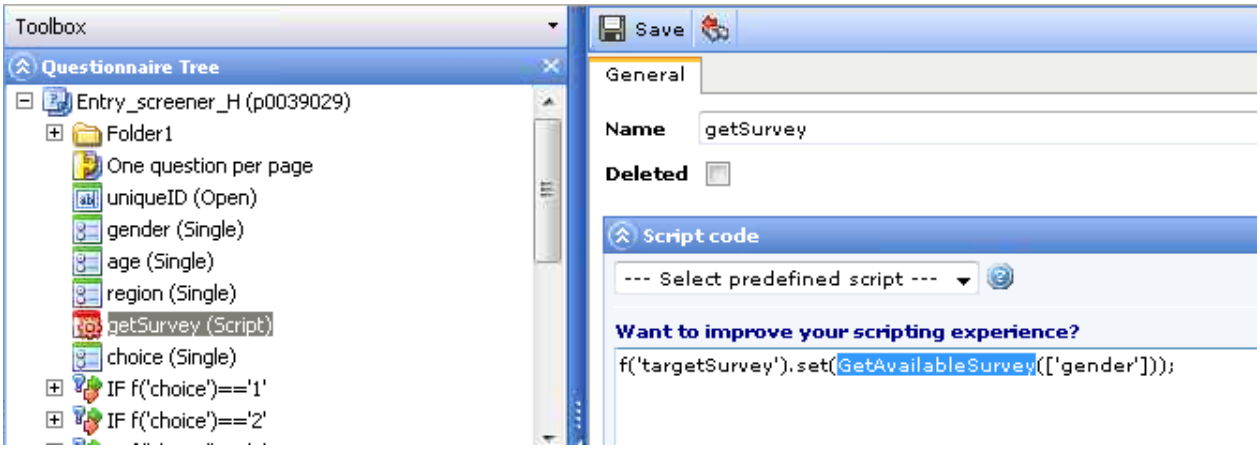


Figure 417 Example of the GetAvailableSurvey script in use

The parameters for this function comprise an array of the question IDs that you are interested in, for example:

```
f('targetSurvey').set(GetAvailableSurvey(['gender']));
```

In this instance the "gender" question is to be checked. If for example the respondent has answered the "gender" question in the original survey by stating they are "male", then the survey routing algorithm will check the remaining surveys in the group and ignore any surveys where the quota for males is already full. As in this case "gender" is the only selection criteria required, the routing algorithm would now select the survey with the highest priority and open that survey for the respondent.

Availability of the respondents quota profile does not consider Optimistically populated (currently active) respondents; only those that have completed the survey and have caused the quota cell to be incremented.

In the event several surveys satisfy the selection criteria and they all have the same priority, a survey will be selected from the group at random.

In the event that no surveys satisfy the selection criteria, no survey IDs will be returned. When a potential survey is found, the system will verify that the respondent has not already participated in that specific survey (username in the respondent table is used as key); if they have then the survey will not be considered as available for selection and the system will attempt to find another survey. After attempting to find another survey three times (this value is configurable for On-Premise license holders) due to the fact that the respondent has already participated, the system will stop trying to find a survey and will return nothing (as if no surveys are available for selection).

An exact match is required for all the criteria listed in the array. So in this case if a survey in the group does not have a "gender" question, then that survey will not be considered for selection by the algorithm.

More than one question can be included in the array; type the question IDs into the array, separated by commas.

More advanced selections can be made by supplying an inclusion or exclusion list of survey IDs as part of this function call (see Additional Scripting Parameters on page 397 for more information).

11.7.2. RedirectToRouterSurvey

This script is used to transfer the respondent and any answers he/she has already provided, to another survey in the routing group, typically the selected target survey .

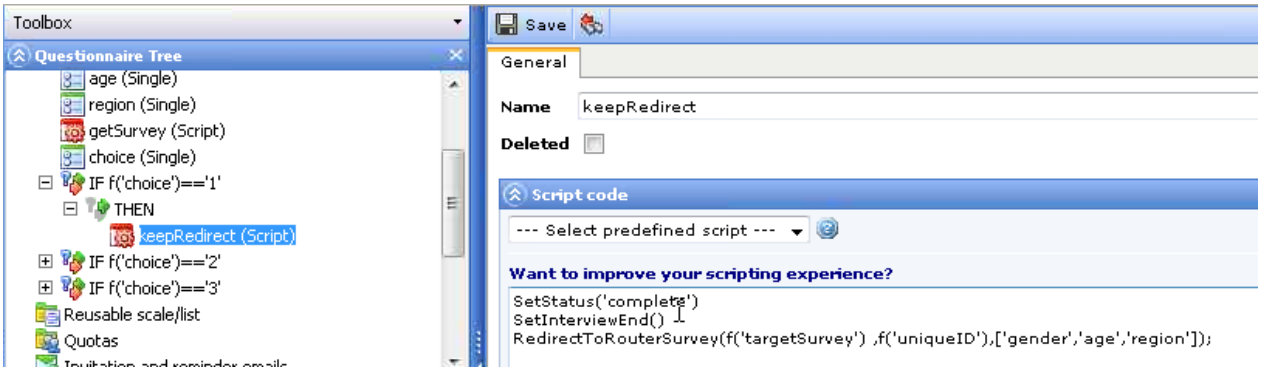


Figure 418 Example of a RedirectToRouterSurvey script

In this case the script used is:

```
SetStatus('complete')
SetInterviewEnd()
RedirectToRouterSurvey(f('targetSurvey')
,f('uniqueID'),['gender','age','region']);
```

The script components are:

- **SurveyID -** here you can supply the required survey ID or use the survey selected by the algorithm. In this case the value delivered by the selection algorithm is to be used.
- **Identifier -** this is the respondent's identifier, typically the panelist ID, that is used to keep track of the respondent as he/she is re-routed.
- **Array of questions -** in this case ['gender', 'age', 'region']. These are the question values (the answers already provided by the respondent) that are to be passed on from the original survey to the target survey. Single, numeric and open text variables can be used here. These are optional; you do not have to supply questions to be passed.

11.7.3. Additional Scripting Parameters

You can control the selection algorithm further by providing a survey ID list and specify "Include" or "Exclude". The specified surveys will then be included in the set of assessed surveys, or excluded from the list as appropriate.

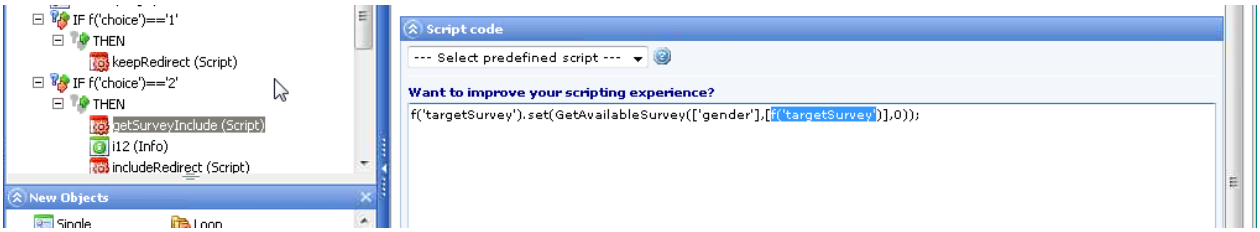


Figure 419 Example of an "Include survey" script

11.7.4. Question Masking

When a respondent is re-routed to a different survey, the chances are that he/she has already answered a number of questions (the answers have probably been used to screen the respondent from the original survey, resulting in the re-routing). The respondent probably does not want to have to answer those same questions in the new survey, so you need to hide them. You cannot just remove the questions from the survey because other respondents may be allocated to this survey as the first choice, so will not have answered the questions previously. You must therefore use question masking to hide the questions if answers have already been provided.

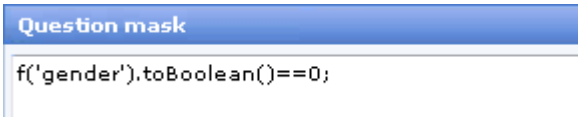


Figure 420 Example of a question mask to hide a question that has already been answered

This question masking script asks whether the question already has a value (answer), and if so, the question is hidden.

Note that for every potential target survey that is included in a routing group, the question masking script must be added "manually" to each question that may already have been answered in the "original" survey.

Important
If you use this masking, remember to check the "No cleaning on question masking" property (see The General Tab on page 251 for more information). If this property is not checked, then the data will be cleared if the page is empty. Bear in mind that the data may have been set using hidden/background variables.

12. Database Designer

Important
Database Designer is provided on the understanding that the user already knows how relational databases are built and function, and in particular that the user has knowledge of relationships between tables and the use of primary keys. Whilst Confirmit will provide basic support for this tool, Confirmit reserves the right, after giving prior warning to the Client, to charge for assistance which it considers to be Additional Services.

12.1. What is Database Designer?

Use Database Designer to set up tables and table structures that can then be used as answer lists in single questions in Confirmit surveys, instead of defining the answer list in the Answers for the question. There are two ways of using this functionality in a Confirmit survey:

- **Table lookup –** where you can maintain an answer list outside Confirmit surveys. This has several advantages:
    - It is then possible to refer to the same list (for example a list of brands) from different surveys.
    - You can update the list dynamically without having to edit the questionnaires.
    - You can instantly apply the changes to all surveys where the list is used.

  The list can be changed outside the surveys, and the changes can then be implemented without having to recompile and regenerate the surveys. This gives major improvements when working with long answer lists, both when compiling and generating the questionnaire, and for the respondents.

- **Hierarchical lookup –** where you can define hierarchy structures with any number of sub-levels. This could for example be for an organization from division to department to unit, for locations from continent to country to city level etc. The structure is defined in the Database Designer with one or more tables and keys to define the relationship between the different levels. When answering the interview, the respondent can then find his/her answer by browsing through a hierarchical tree structure. The hierarchical structure is also available for reporting in Confirmit Reportal.

Note: For regular answer lists when used in Single questions, Multis and Grids etc. Confirmit recommends that the number of rows is limited to a maximum of 500. However Table lookups and Hierarchical lookups created in Database Designer will be able to handle a larger number of rows.

Access Database Designer via the **Home** menu or the Quick Access pane.

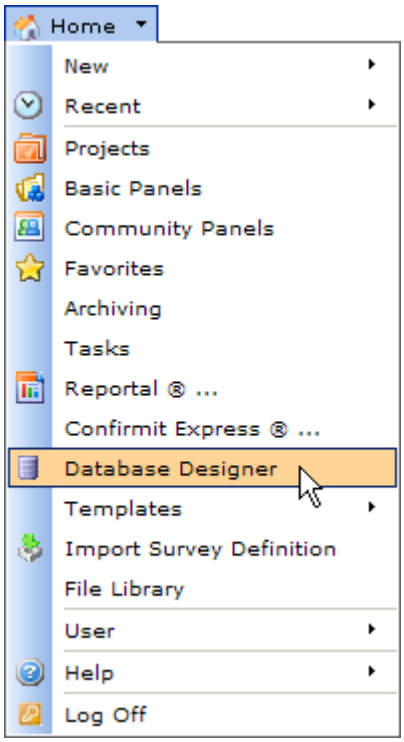


Figure 421 Entering Database Designer

When you access Database Designer, the window lists all the schema available. The list is divided into pages, where each page contains a maximum of 50 schema; click the **next/previous Page** buttons in the lower-right corner of the page to move between pages. Click a letter-button (along the lower edge of the page) to list only the schema where the name starts with that letter. The list can be sorted on the Schema ID and the Schema Name; click the appropriate column header to toggle the sort order up or down on that column.

12.2. Creating a Schema

To create a new database schema:

1. In the Quick Access pane towards the left of the Confirmit window, open Database Designer.
2. Click the **New Schema** button located towards the right end of the page's toolbar.

   The New Schema page opens at the Properties tab.

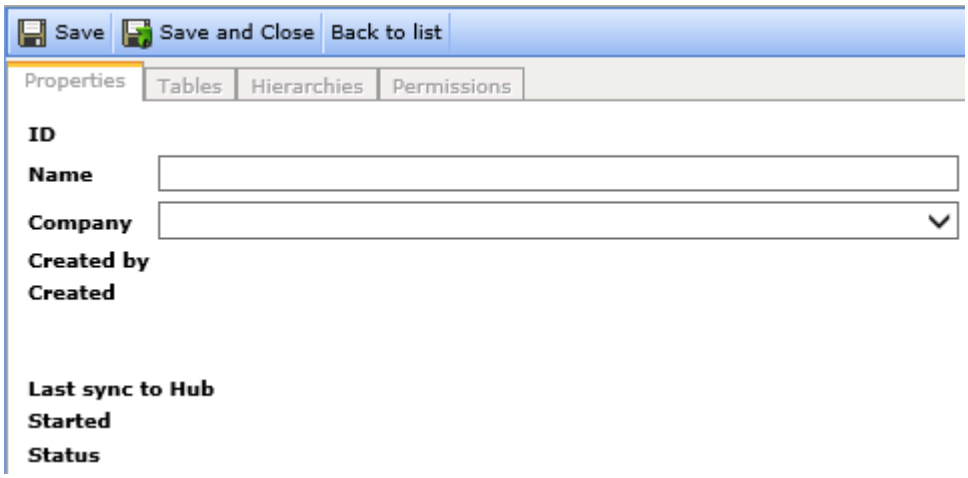


Figure 422 The New Schema page

3. Give the schema a name and click **Save**.

   A new, empty database is set up and assigned an ID, the company and "created..." information are filled in automatically, and the remaining tabs and buttons on the page become available. The ID will be the next schema id number available in the server. Note that you can change the schema name at any time, but the ID cannot be changed.

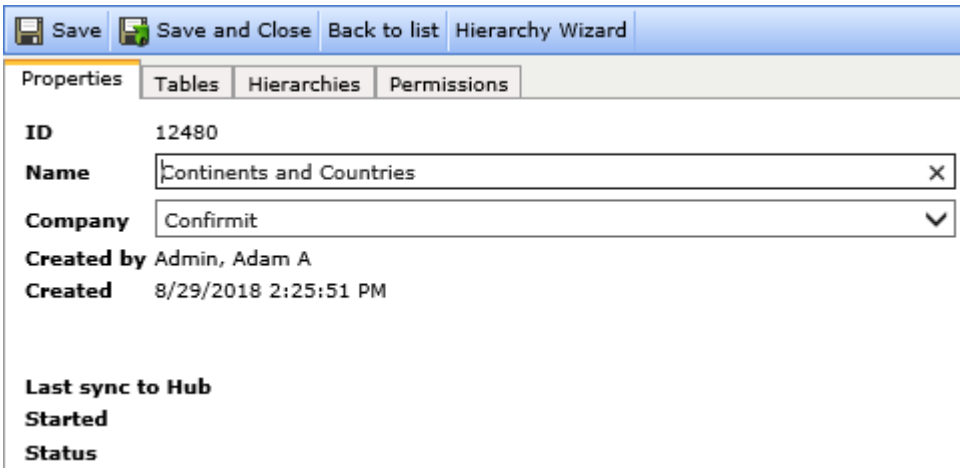


Figure 423 Creating a new schema

12.2.1. How to Insert a New Table

To create a table within the database:

1. Go to the Tables tab and click **Add Table**.

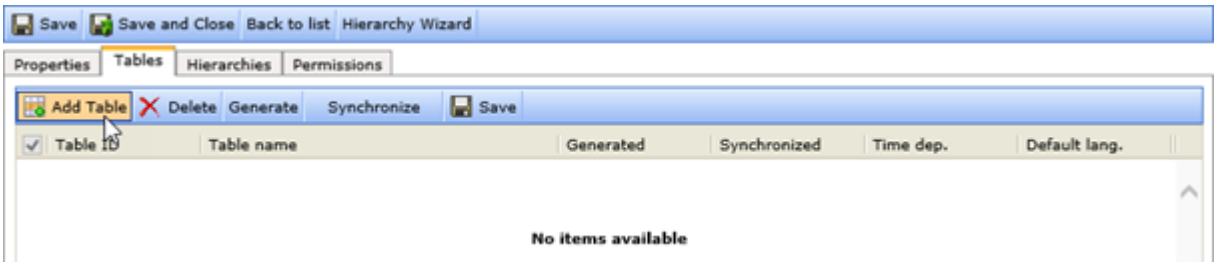


Figure 424 Adding a table to the database

A new row appears in the table list, and the field under Table name is editable.

2. Click in this field and enter a name for the table you are creating, in this example **Continents**.

   This field will be the name of the table in the default language, selected in the table's properties tab (see Table Properties on page 402 for more information).

Note. Table names should be a maximum of 20 characters. If the table name has more than 20 characters, problems may arise later when using data templates and Bitstream files.

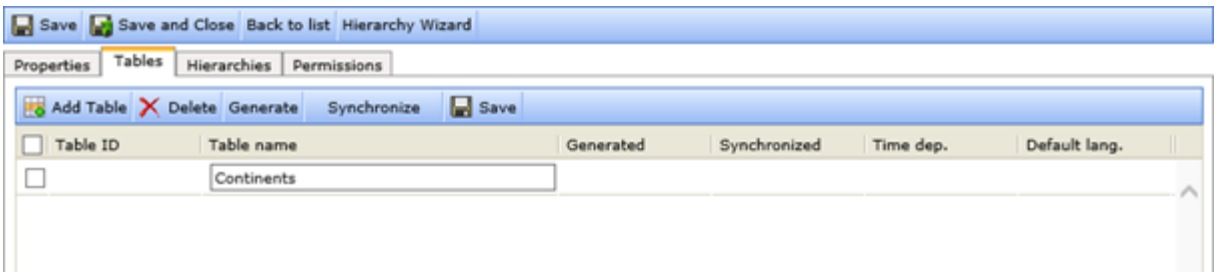


Figure 425 Entering the table name

3. Click **Save**.

   The table is assigned a Table ID (the next available table ID in the server) and the remaining columns are given the default values.

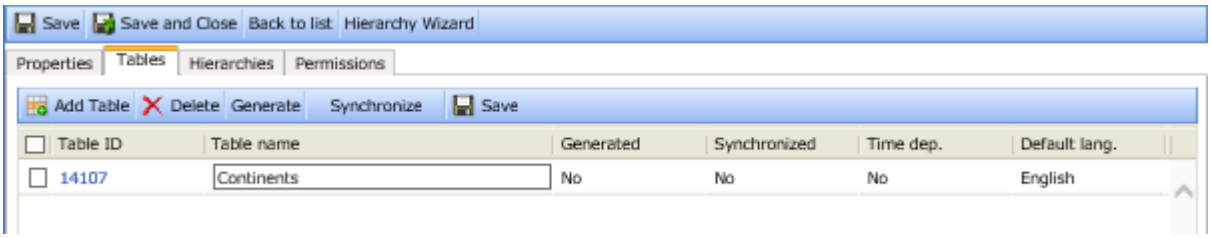


Figure 426 The new table is saved

4. To modify the table, click on the table ID (see Table Properties on page 402 for more information).

12.2.2. Table Properties

A schema can contain a number of tables, and these are listed on the Tables tab. Click on a Table ID number (blue text to the left of a table row - it turns orange when pointed to) to open the Properties form for that table. The Properties form opens below the table list, at the Properties tab.

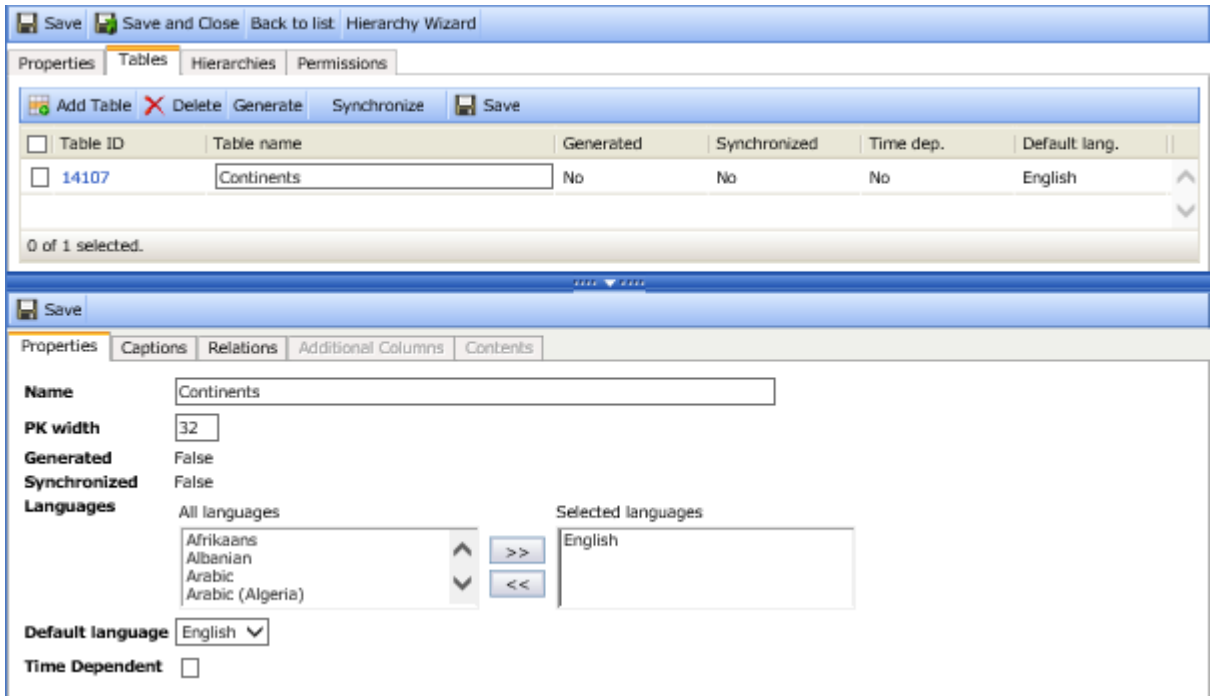


Figure 427 The table Properties tab

- **Name -** you can change the table name, but not the Table ID.

Note. Table names should be a maximum of 20 characters. If the table name has more than 20 characters, problems may arise later when using data templates and Bitstream files.

- **PK width -** specifies the field width (number of characters) of the *primary key* of your table (PK width). The primary key is the unique identifier for the elements in the table (similar to the codes that are used as unique identifiers of the elements in answer lists in Confirmit questions). The content of the primary key fields can be alphanumeric characters (letters and digits), and underscore (_) only, with no white-space.

Note: After the table is generated, you cannot modify the primary key width setting.

- **Generated -** indicates whether the table has been generated (it exists) or not. True = the table is generated, False = it has not.
- **Synchronized -** when you generate the table, two versions are created; the design version and the runtime version. This indicates whether the two tables are identical, or whether changes have been made to the design table that have not yet been copied to the runtime table. To copy the changes to the runtime table, click **Synchronize**. Note that some changes, for example adding columns, are copied automatically to the runtime table; you do not need to synchronize.
- **Languages -** here you select the languages that you wish to be used in the table. You can select as many languages as required, and you can select additional languages at any time. Click into the All Languages list and type the initial letter(s) for a language name into the field to move to that language. In this example two languages are selected so far; English and Norwegian, and English is set as the default language. Note that a row will be added to the Captions list for each language selected here.
- **Default language -** the default language is initially taken from the user's pc setup. This can be changed to any of the languages that have been selected for the table.
- **Time Dependent -** allows you to track changes in hierarchy nodes over time (see The Time Dependent Property on page 404 for more information). Note that this functionality is currently not supported on the reporting side.

Note: Once Time Dependent is selected for a table, it cannot be deselected.

Save any changes by clicking the **Save** button located above the Properties tab in the lower part of the window.

12.2.2.1. The Time Dependent Property

The Time Dependent property allows you to track changes in hierarchy nodes over time. For example, if you have a hierarchy based on a company with a department node under a particular manager, and you know that the department will be organized under a different manager for a period, then you can set up the hierarchy such that responsibility for the department changes on the appropriate dates. Data collected by surveys using this hierarchy will then be allocated to the appropriate managers for the appropriate periods.

Note: Once the Time Dependent property is selected for a table, it cannot be deselected.

Important
While this functionality works for the hierarchy, it is currently not supported on the reporting side. So changes in the data over time will not be reflected in any reports using the data.

12.2.3. Captions

The table will need a caption in each language selected in the Properties tab. Go to the **Captions** tab to specify the table names in the various languages; a row is displayed for each language. In each row, the Caption field will initially display the Table name in the default language. Click on a name in the list to modify it, and on completion click **Save**. The figure below shows the "Continents" table name being translated to Norwegian.

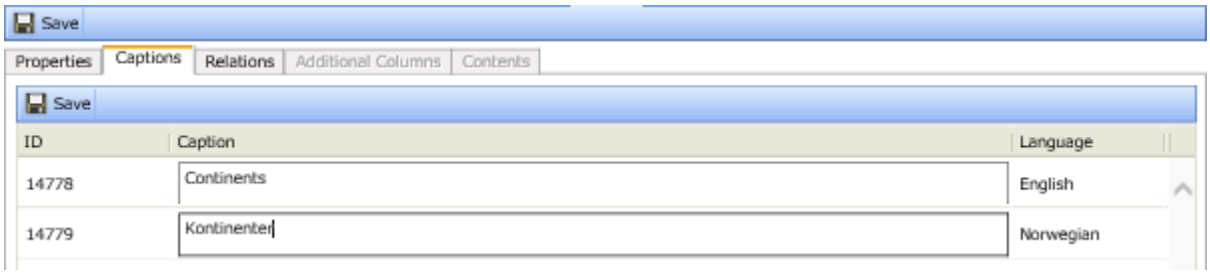


Figure 428 Example of the Captions tab

12.2.4. How to Add a Relationship

In the Relations tab you specify the relationship between the tables; that is, which table is the "parent" of the currently selected table.

1. Go to the Relations tab.
2. Click **Add Relation**.

   A row is added to the table.

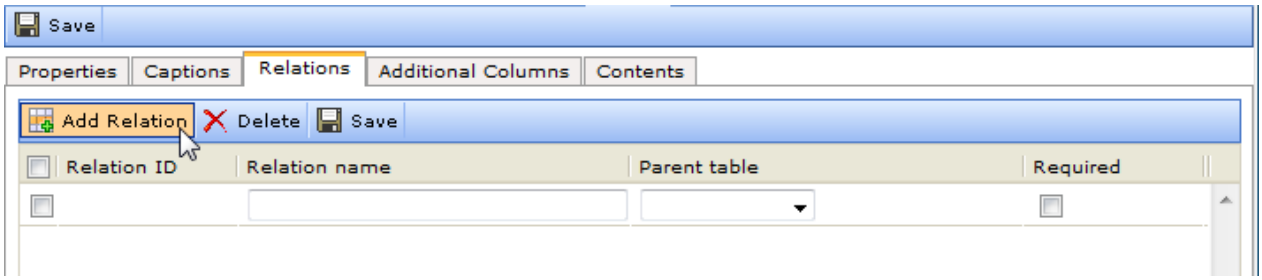


Figure 429 The Add Relation tab with a new row

3. Type a name for the relationship into the Relation Name field.
4. Click in the Parent Table field to open a drop-down list of the available "parents", and define the parent table.
5. If a Parent must be defined for each child, check the Required box.
6. Save the changes.

Note that the table must be synchronized before any surveys using it can be launched.

12.2.5. How to Generate the Table

Once the table properties are set up as required, the table must be generated. This adds the table to the database according to the properties you have set up.

1. Select the table in the table list by clicking in the checkbox to the left of the appropriate Table ID number.
2. Select **Generate**.

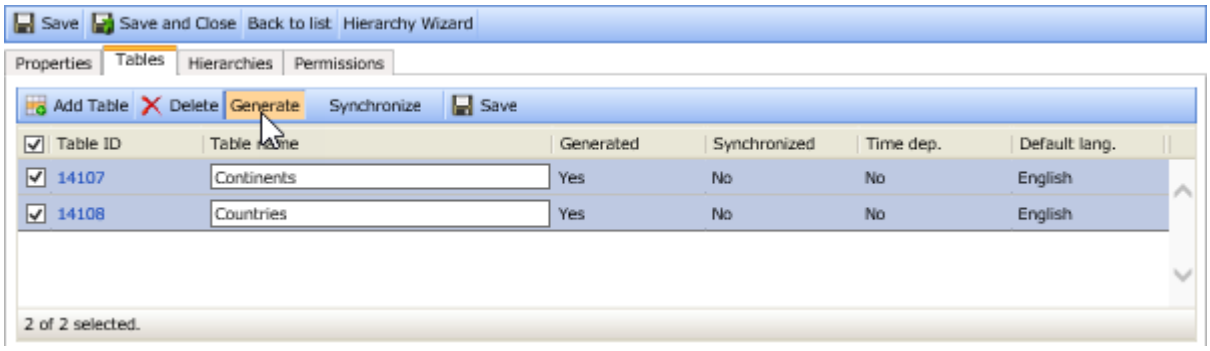


Figure 430 Generating the table

Note: You can select all tables in the database by clicking in the checkbox beside the Table ID header.

The flag for the selected table(s) in the “Generated” column will now change from **No** to **Yes**.

Once the table is generated, the **Additional Columns** and **Contents** tabs in the table details area will be enabled, allowing you to edit the table content.

12.2.6. How to Edit the Table Contents

When you first create a table it will be empty and you will need to add the desired contents. In addition, existing tables can also be edited. You can add further columns to the table via the Add Columns tab, and add the contents via the Contents tab.

In the Contents tab you can enter fields one by one, copy data from files and paste it into the table (see How to Copy and Paste Data into a Table on page 407 for more information), or you can upload the data as a file.

Note: Any language-sensitive texts that you add to the tables in Database Designer can have a maximum of 2048 characters.

To delete a row from the table, click in the box to the left of the row to select it, then click **Delete**.

Note: The Contents tab has search fields above the columns. In the event you have a large number of rows in the table and you wish to edit a particular row, use these search fields to reduce the number of rows displayed.

12.2.6.1. How to Add Data to the Table

To add the rows individually to the table:

1. Go to the Contents tab and click **Add** to insert a new row in the table.

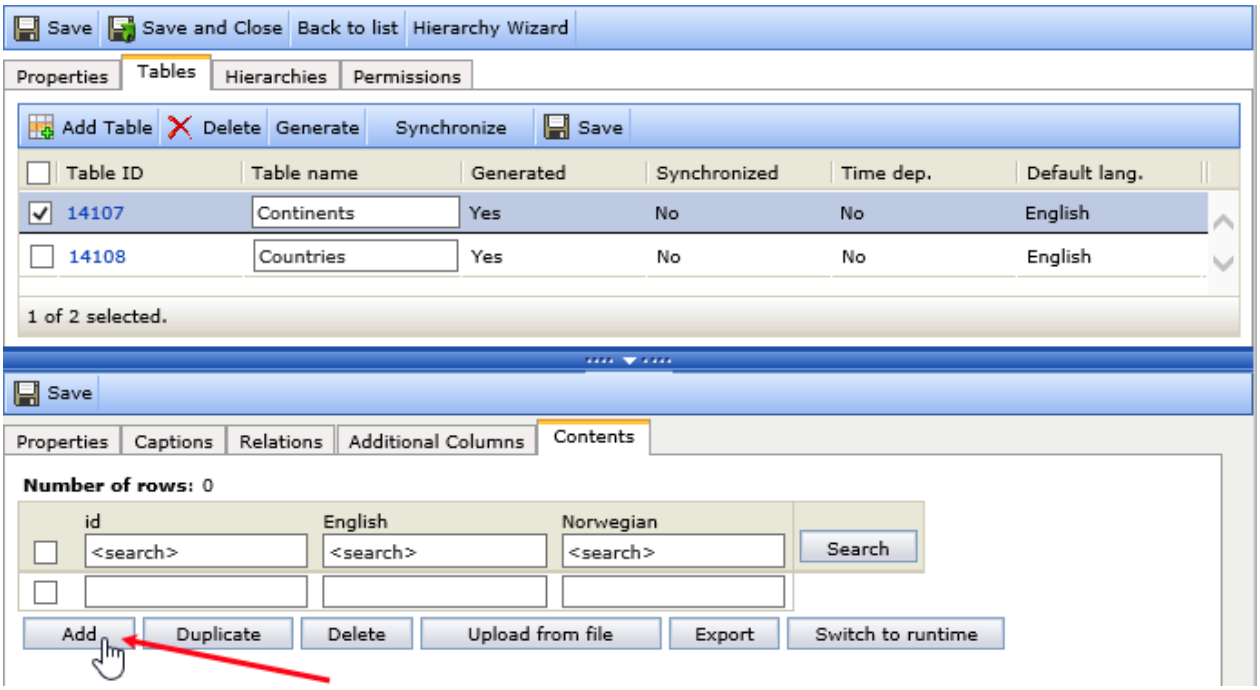


Figure 431 Adding content to the table

2. Fill in the details as required for the row.

Note: Any language-sensitive texts that you add to the tables in Database Designer can have a maximum of 2048 characters.

3. Repeat the procedure until the table is complete.
4. When you have completed the changes click **Save**.

   The **Number of rows** is updated, and the ID codes are locked (they turn red).

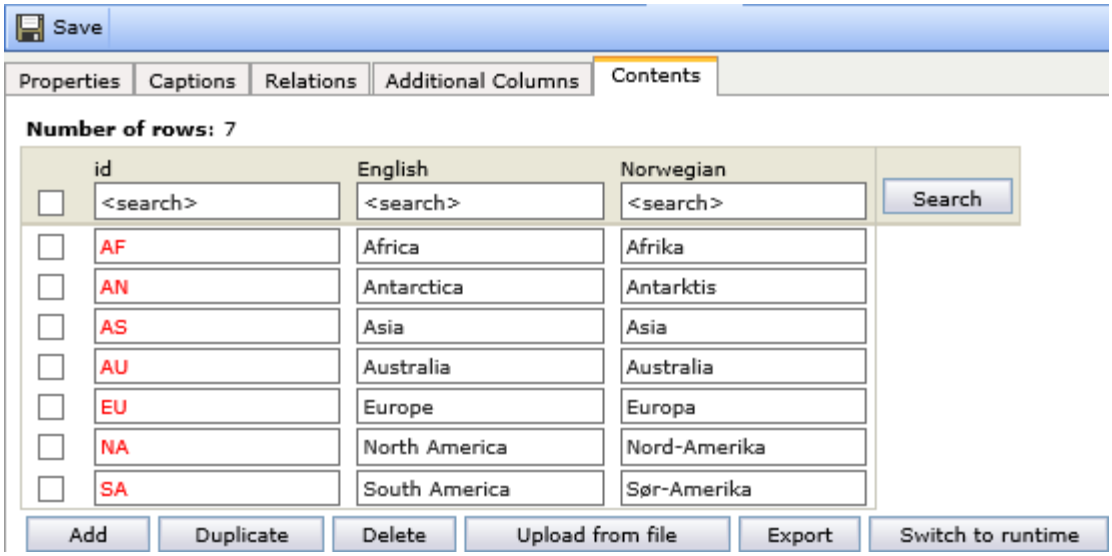


Figure 432 The completed and saved table

12.2.6.2. How to Copy and Paste Data into a Table

If you have the data columns in the required order in an Excel or tab-separated file, you can copy and paste the entire list into a Confirmit table. To copy/paste data from a file:

1. In the source file, select and copy the desired columns and rows.
2. In the destination table, click **Add** to add a row, then click into the field into which you want the first column of copied data to be pasted.
3. Paste the copied data.

   Additional rows will be added to the table as required to provide space for the rows you are pasting.
4. On completion, click **Save** to save the changes.

Note that if you copy more columns of data from the source file than exist in the destination table, then "excess" columns will be ignored and the data from those columns will not be added to the table. If you copy fewer columns from the source file than exist in the destination table, then the "unused" columns in the table will remain empty.

You can copy columns of texts from separate Excel files, into separate columns in the table. This would allow you for example to add columns of texts translated by different translators for the languages selected for the table.

Note: Any language-sensitive texts that you paste into the tables in Database Designer can have a maximum of 2048 characters.

12.2.6.3. How to Add a Column

Note: It is not possible to change the name or length of existing columns in a table once that table has content. In this event an information message will be displayed and the data fields will be grayed out.

Also, you must have Administrate Schema permission for the database, otherwise the Add Column button will not be available.

The Additional Columns functionality allows you to put additional information into a Database Designer table. So if you have for example a hierarchy with regions and clients, you can not only put the clients into regional groups, but you can also store their email, phone number, and title in additional columns. Some columns will be language-dependent, for example Title (Mister, Señor, Monsieur), and some will not (email is email irrespective of the language).

These fields can be used within the survey to extract additional information. That is, within a survey using a Database Designer table hierarchy, you could automatically send an email to the appropriate client because it is stored in the additional column with the proper greeting (Mister Client1 vs Señor Client1 etc.).

Note: A maximum of 100 columns can be added to a table, and the column width of each additional column can be a maximum of 128.

To add additional columns to a table:

1. In the Tables tab, click the blue Table ID link for the table to which you wish to add a column.
2. In the lower area, go to the Additional Columns tab.
3. Click **Add Column**.

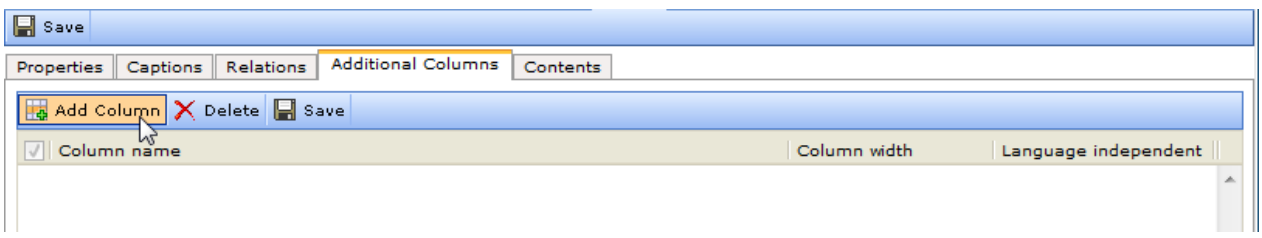
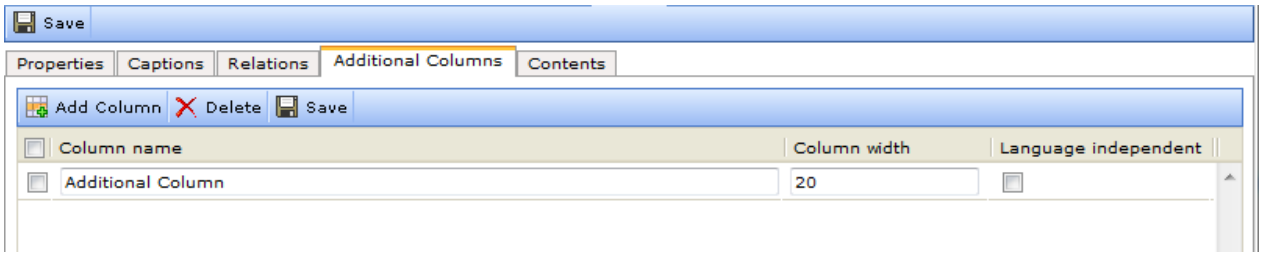


Figure 433 Adding a column to the table

A row is added to the tab .



4. Type the name for your new column into the field.

Note: This will be the column name that will appear in the table and be visible to the user.

5. Add the desired column width.

   Column Width defines how many spaces in the database the column will hold. So, for example you could set the "email" column width to 70 so it will accept even long email addresses. Note that you must supply a value or you will not be able to save the changes.

6. Select whether or not the new column is to be language independent.

   If the column is to be language-dependent, a column will be added (visible in the Contents tab) for each language that is selected for the table in the Properties tab (see Table Properties on page 640 for more information). If the column is independent of the language, then only one column will be added, for the default language.

7. Click **Save** to save the changes.

The new column is added to the table. Go to the Contents tab to see the columns.

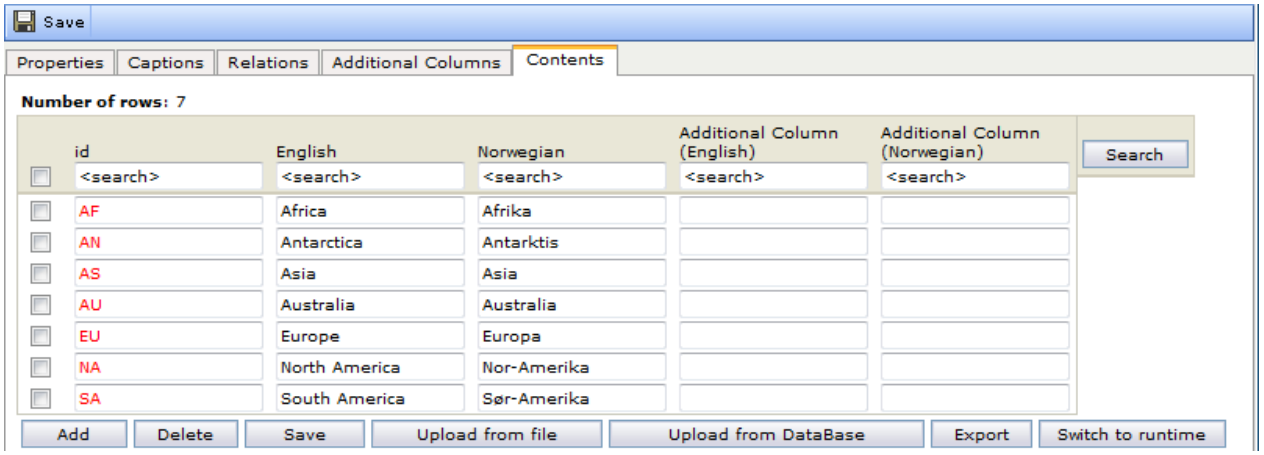


Figure 434 A column is added for each language selected for the table

12.2.6.4. How to Upload the Table Contents

If you have a long list that you wish to add to a table and that list is available as a file, you may wish to upload the list instead of copying and pasting the data or entering the items individually via the interface. You can upload from a file, or pick up the file from the FTP site if you have the appropriate license. You can also schedule the task for a later time, and make the task recurring so that the table can be updated automatically.

Important:
The file to be uploaded must be in tab-delimited text format (created for example via "Save as" or "Export" in applications such as MS Excel®) (see The Upload File Format on page 410 for more information). This text file may also be zipped and uploaded as a .zip file.

Note: Any language-sensitive texts that you upload to the tables in Database Designer can have a maximum of 2048 characters.

1. In the schema window, go to the **Tables** tab and click the **Table ID** for the desired table.

   The table details page opens below the table.

2. Go to the **Contents** tab and click the **Upload from file** button, as shown below.

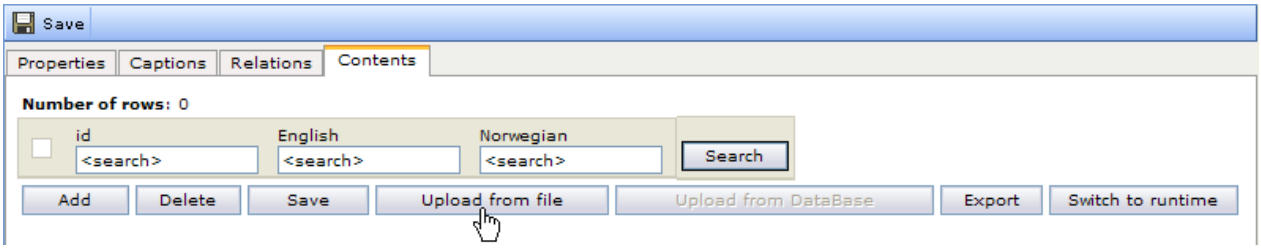


Figure 435 Uploading a list

The Upload Table Content overlay opens.

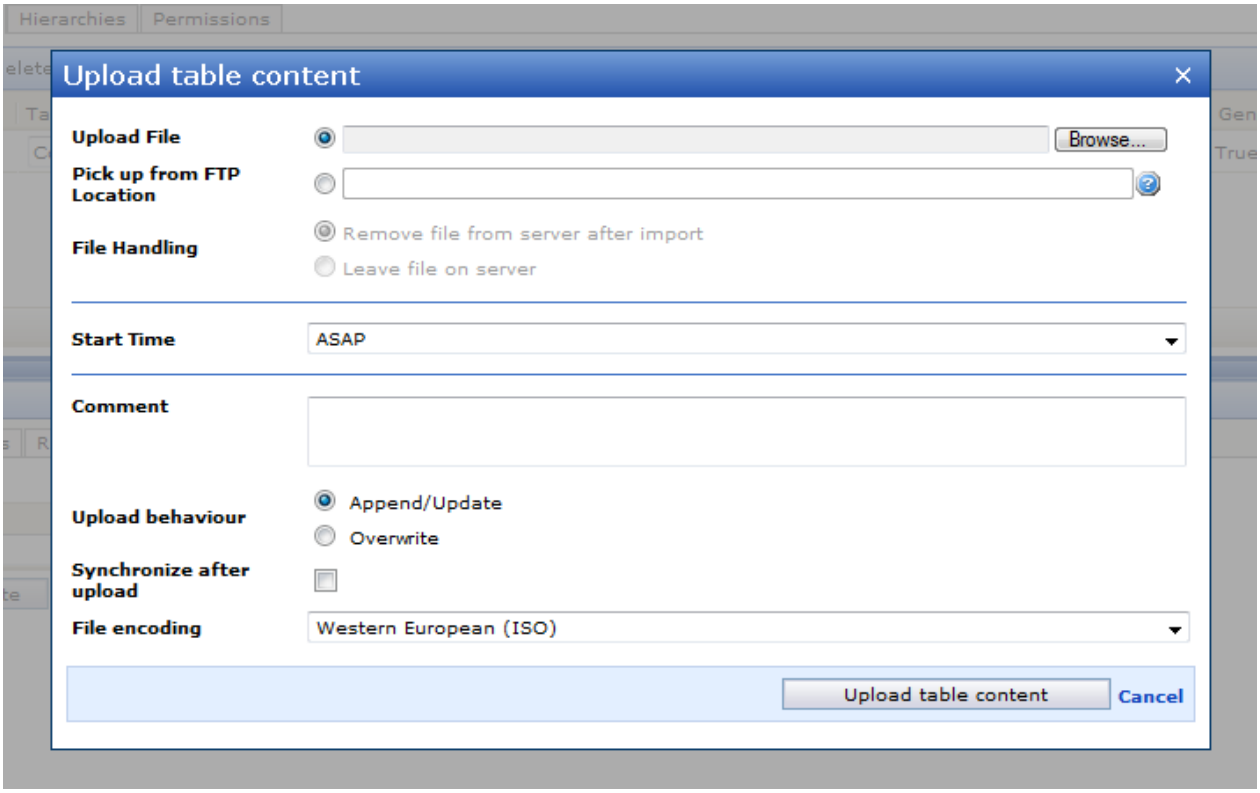


Figure 436 The Upload Table Content overlay

3. Select the type of upload you wish to perform.

    - **Upload file -** if you wish to upload the source file from your server network (perhaps the file has been stored there after having been sent to you via email), then select this option and click **Browse**. A standard browser window opens, in which you can search for and select the file you wish to upload.

    - **Pick up from FTP location -** if your company has licensed the FTP add-on and it has been enabled, this option will be active. You can then fetch the file to be uploaded, from Confirmit's FTP location. Confirmit's FTP address is specified as part of the enabling procedure and cannot be changed. The file should be placed in **.../upload/tablecontent/...**. Note that fetching from FTP can allow automation of data flows, since files can then be picked up automatically.

    - **File handling** - if you have selected Pick up from FTP, select whether you wish to copy the file from the FTP site (leaving the file there for future use) or move it (delete it from the site).

4. Set the Start Time for the task, and set up the recurrence properties if required.
5. Select the desired Upload Behaviour.

    - **Append/Update** - merges any content that already exists in the table with the content of the file, based on the id field. If a code in the id column is already in the table, its texts will be replaced with the texts from the file. If the code is not already in the table, a new row will be added with that code and its texts.

    - **Overwrite** - removes all the current content and replaces it with the contents of the file.

6. Check the **Automatic Synchronize After Upload** box if you wish to perform that process automatically.
7. Click **OK**.

A task will be queued on the Confirmit batch server. When the task is executed, the content of the file will be inserted into the table in the manner specified.

12.2.6.4.1. The Upload File Format

The file to be uploaded must be in tab-delimited text format, created for example via “Save as” or “Export” in applications such as MS Excel®. This text file may also be zipped and uploaded as a .zip file.

Columns that are not language-dependant will be allocated the default language, set on the Properties tab (see Table Properties on page 640 for more information).

Note: The language codes must be preceded by two underscore characters.

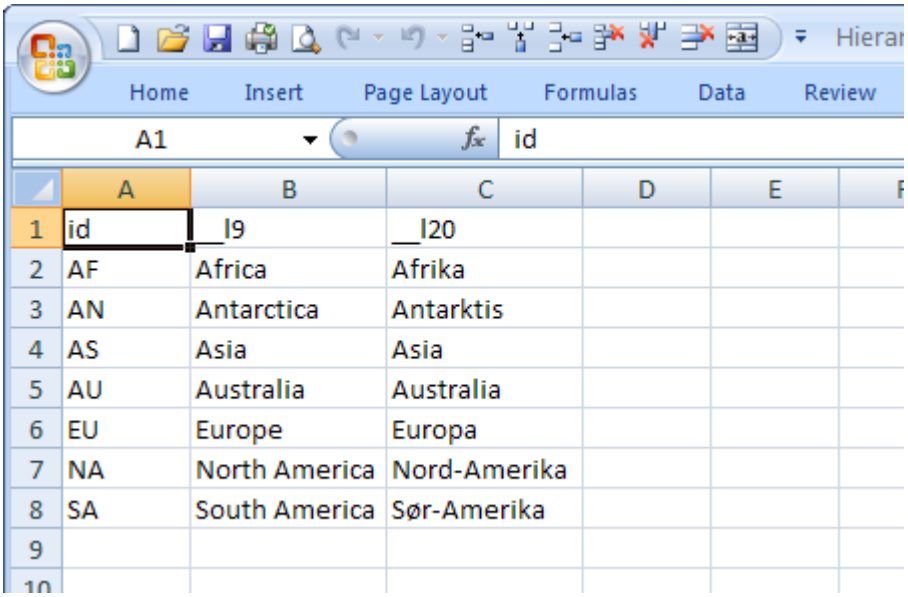
The first column header must always be the **id** (the identifying code for the table item). This will be followed by the remaining columns. Where columns are language-dependant, there must be a column for each language selected in the properties tab. The column headers for these columns must be two underscore characters followed by the language code for the language to be used. For example, if a file is to be uploaded to a table that has two languages selected; English and Norwegian, then the first column header will be **id**, the second column will be __**l9** (the language code for English), and the third column header will be __**l20** (the language code for Norwegian). If a relationship is specified, then this will be the final column. See the table below:

Column header	Description
id	The primary key field with the unique code for each item.
__l+<language code> (for example __l9 for English, __l20 for Norwegian etc.).	One or more columns (depending on the number of languages) with the answer texts (see APPENDIX B: CONFIRMIT LANGUAGE CODES on page 851 for more information).
<relationship field(s)> (for example r1).	For each relation the table is used in, you must include the name of the relation (as set up in relations), for example r1

	in the “continent-countries” example.

Note: Columns that are not language-dependent must still include the language code for the default language. For example, a column for email addresses "email" where the default language was English would have the header "__l9email".

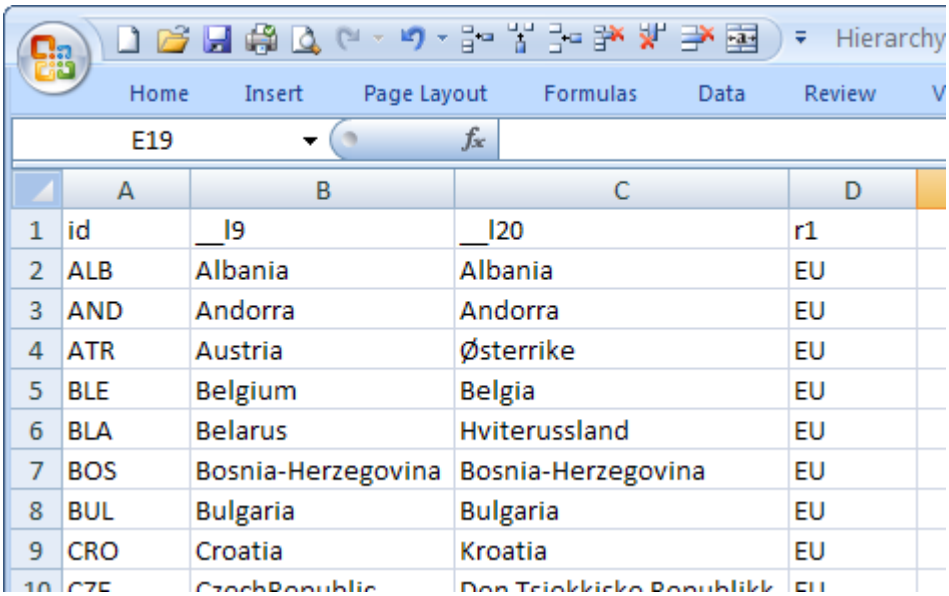
The contents of the “Continents” table could have been uploaded from a file as:



	A	B	C	D	E
1	id	__l9	__l20		
2	AF	Africa	Afrika		
3	AN	Antarctica	Antarktis		
4	AS	Asia	Asia		
5	AU	Australia	Australia		
6	EU	Europe	Europa		
7	NA	North America	Nord-Amerika		
8	SA	South America	Sør-Amerika		
9					
10					

Figure 437 Example of a Continents file

The contents of a “Countries” table could be uploaded from a file such as the extract shown below:



	A	B	C	D
1	id	__l9	__l20	r1
2	ALB	Albania	Albania	EU
3	AND	Andorra	Andorra	EU
4	ATR	Austria	Østerrike	EU
5	BLE	Belgium	Belgia	EU
6	BLA	Belarus	Hviterussland	EU
7	BOS	Bosnia-Herzegovina	Bosnia-Herzegovina	EU
8	BUL	Bulgaria	Bulgaria	EU
9	CRO	Croatia	Kroatia	EU

Figure 438 Example of a Countries file

12.2.7. How to Export the Table Contents

You may wish to modify the table contents outside of the database designer and upload the data back into the database designer afterwards. To export the table contents:

1. Click the **Export** button in the “Contents” page.

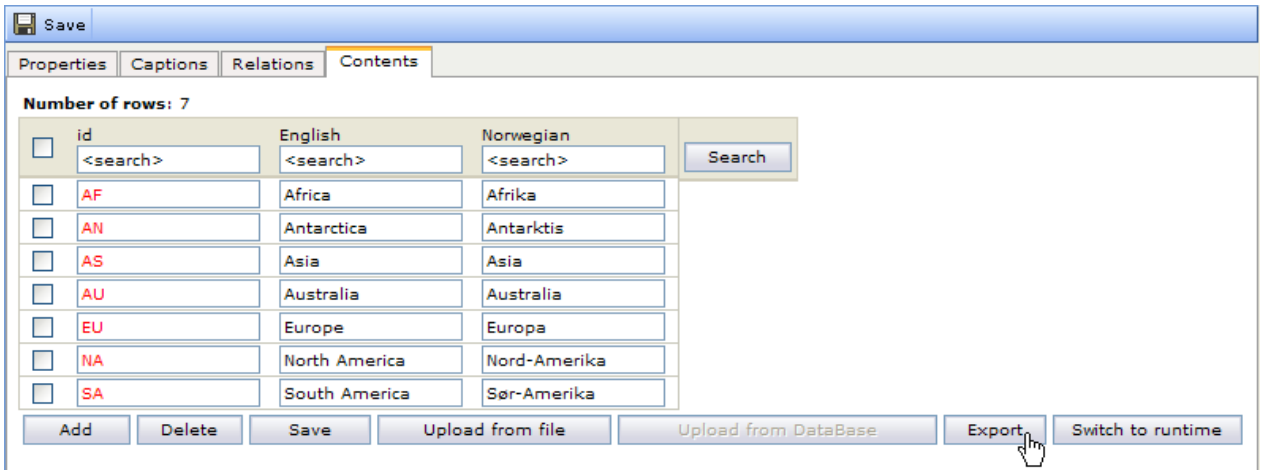


Figure 439 Exporting the table contents

The Export Table Contents overlay opens. This overlay allows you to edit the email address to which the file is to be sent (default is the address of the logged-on user - you), add a comment, and select the type of file encoding that is to be used.

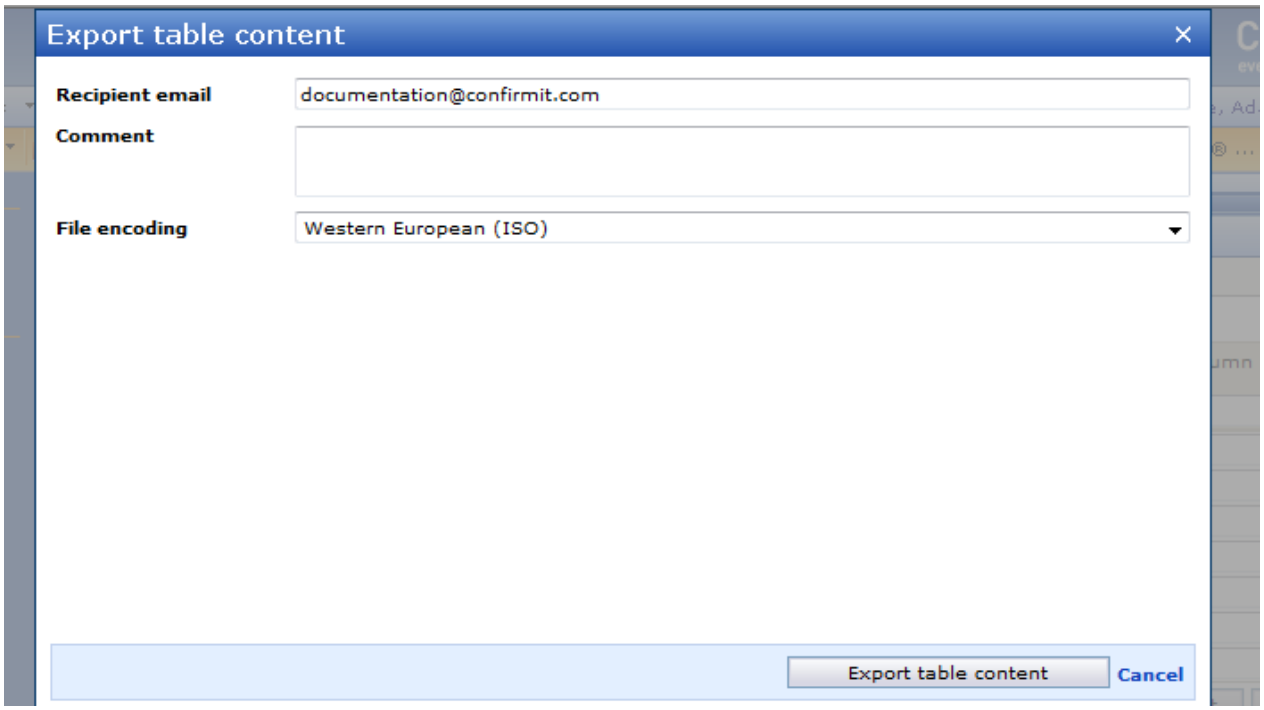


Figure 440 The Export Table Content overlay

2. Make any required changes, then click **Export table content**.

   The file will be exported to Tab delimited text format, and attached to an email. The email will be sent automatically to the address specified in the Selection dialog. There the recipient (default - you) will be able to modify the table contents and upload it back into the database designer again.

12.3. Synchronizing Between Design and Runtime Modes

As the tables you set up in the database designer are used dynamically by Confirmit questionnaires, it is useful to have the ability to edit the table contents without having the changes directly applied in the surveys. For this reason there are two “modes” when you work with the tables – “Design mode” and “Runtime mode”. Design mode is the "off-line" mode in which you can edit the database without effecting it; Runtime is the “live” table being used in the surveys, that is, the content as the respondents see it. After you have entered content in your table in Design mode, you must transfer the content to the Runtime mode. To do this you must synchronize:

1. In the table list, select the table you wish to synchronize.
2. Select **Synchronize**.

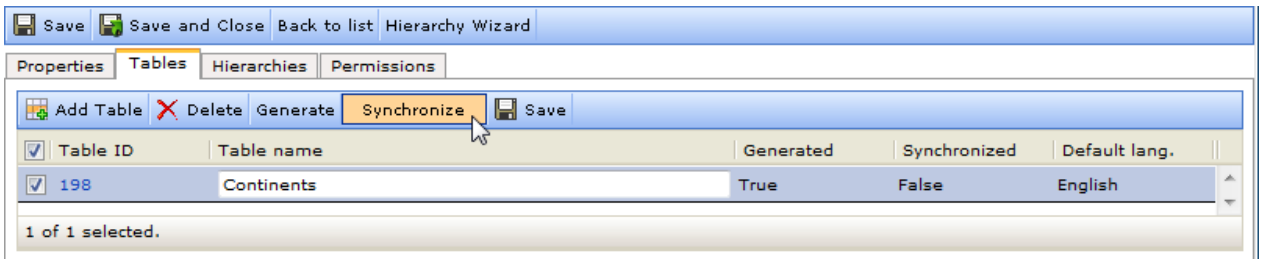


Figure 441 Synchronizing the table

The Table Synchronization task page opens and the synchronization task is run.

3. On completion, click **OK** to return to the Tables tab.

   The table's status in the “Synchronize” column has changed to **True**.

Note: Whenever you make changes in your table, you must synchronize to set the changes “live”.

When working with the table content, click the **Switch to Design/Runtime** button to switch between the Design and Runtime modes to compare the content. Note that you cannot edit the content in Runtime mode.

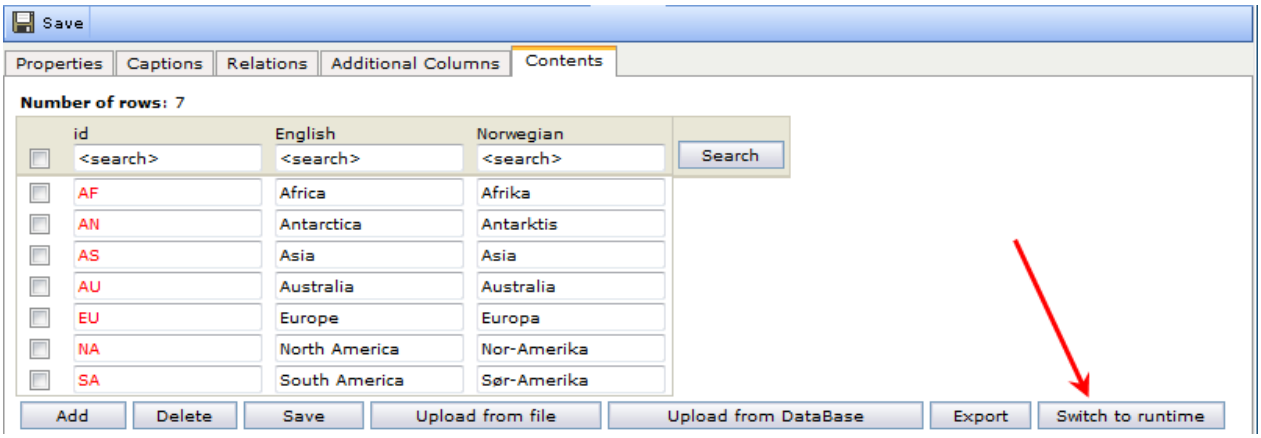


Figure 442 Runtime mode

Click **Save** to save the changes you have made in the table in Design mode, including removing rows you have deleted. To apply the same changes in Runtime mode, select the table and click **Synchronize**.

The table overview shows the status of your tables. If you make changes to the table in “Design mode”, the Synchronized status will read False until you synchronize.

12.4. Hierarchies

A hierarchy is a type of question where the answers are ranged in more than one level. The respondent "enters" the question at the top level, whereupon the answer options in the next level become viewable. When the respondent selects an answer option in that level, the options in the next level (if one exists) become viewable, and so on. Each answer option in a lower level is accessible through only one option in the higher level. This results in a tree-like structure, with one trunk splitting into several branches, and each branch splitting further and ending finally at a leaf. Each leaf can only be reached by following one specific route through the tree. A hierarchy can have as many levels as required, and as many options in each level as required. When the hierarchy question is used in a Reportal report, it acts as a filter.

In the Confirmit Database Designer, you can set up two different types of hierarchies; a **balanced** (or “snowflake” or "non self-referencing") hierarchy and an **unbalanced** (or “parent-child” or "self-referencing") hierarchy.

In a **balanced** (snowflake / non self-referencing) hierarchy every possible path from the top to the bottom of the tree goes through the same number of levels (as with the three levels in the figure below). Such a hierarchy is set up with a table for every level in the tree, and the relationships between the items are defined by setting a relation between the table representing a specific level and the table representing the level above. The respondent selects from the entities at the lowest level.

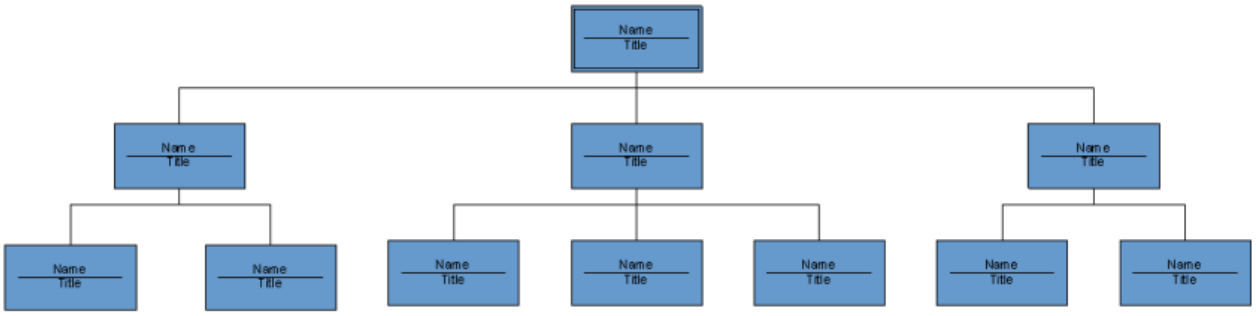


Figure 443 Example of a Balanced hierarchy

An example of this could be the relationship between continents and countries. The Earth is divided into a number of continents, and each continent is divided into a number of countries. The respondent can therefore select a continent, then a country.

In an **unbalanced** (parent-child / self-referencing) hierarchy the different branches do not need to have the same number of sub-levels, as in the figure below. In a hierarchy like this, the entire hierarchy is defined in one table, with relations between elements in the same table (self-referencing). The respondents can select from the entities at any level in the hierarchy, including the top node(s). An example of this is a typical company organization hierarchy.

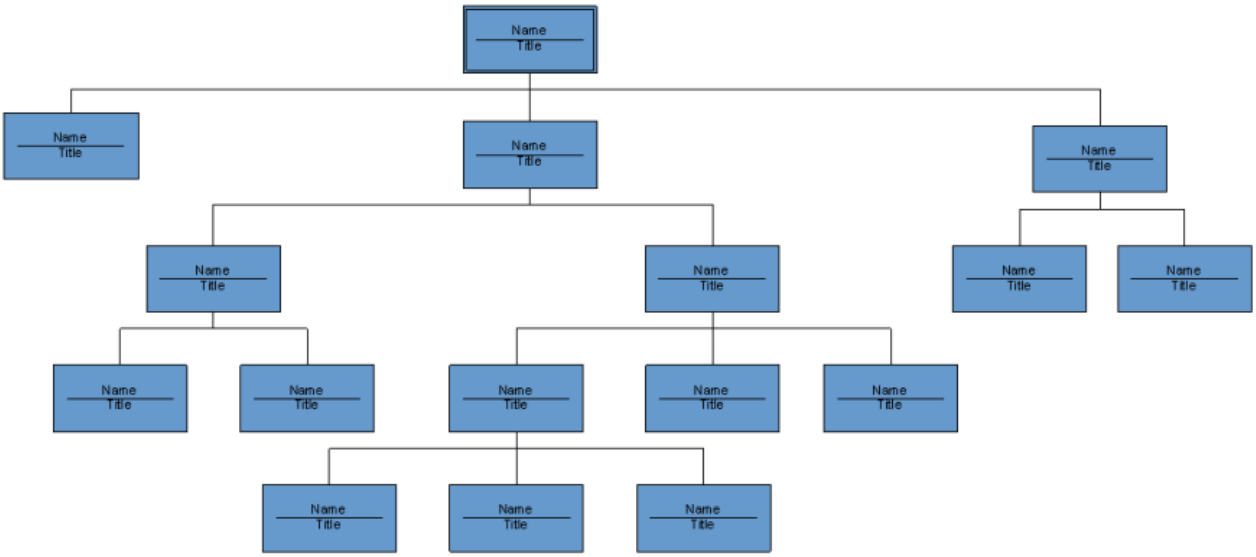


Figure 444 Example of an Unbalanced hierarchy

The Hierarchy Wizard provides you with a simple way of creating a hierarchy by following a step-by-step procedure.

Important
Hierarchies can only be created for single questions, and the question must be indexed (see The General Tab on page 251 for more information).

12.4.1. The Hierarchy Wizard

The Hierarchy Wizard provides a simple method of creating both self-referencing and non self-referencing hierarchies.

1. Go to the Database Designer page, create a new schema, and click the **Hierarchy Wizard** button.

   The first step in the wizard opens as shown below. Here you select the type of hierarchy you wish to create and the languages to be used.

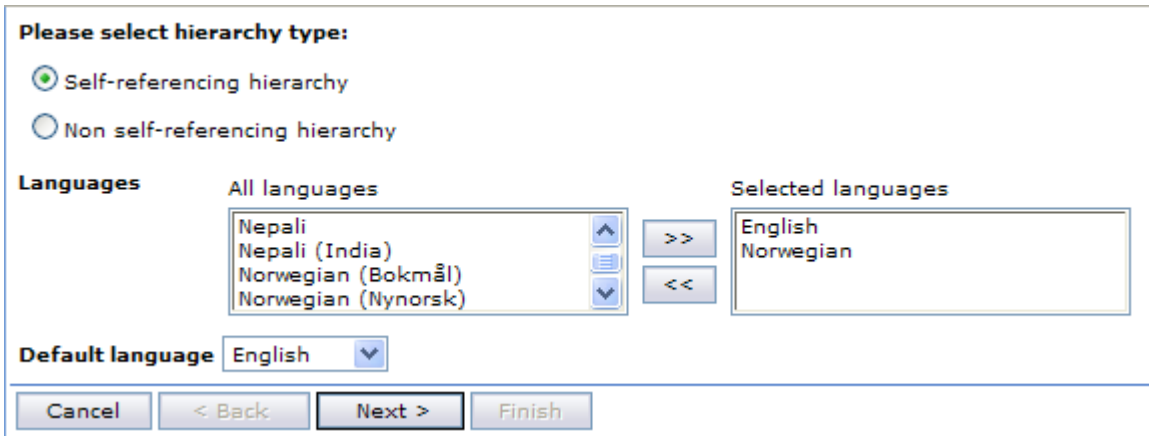


Figure 445 The first step in the Hierarchy Wizard

2. Select **Self-referencing** or **Non Self-referencing** as required.
3. Find the desired languages in the All Languages column and click the **>>** button to select them.
4. Click **Next** to go to the next step in the wizard.

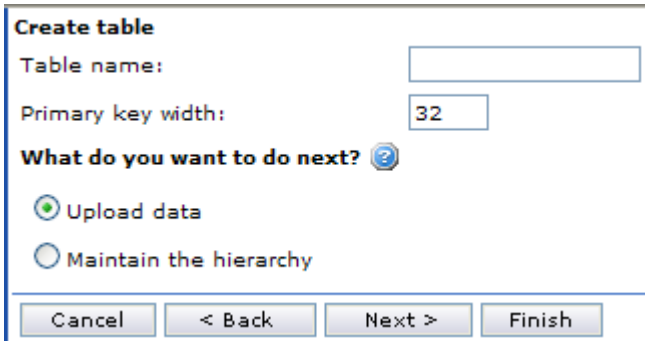


Figure 446 Step two in the Hierarchy Wizard

5. Type in a name for the table and set the **Primary key width**.

   You now have two choices: You can upload a text file containing data into the hierarchy, or you can go to the hierarchy tree where you can modify the hierarchy.

6. Make the appropriate selection and click **Finish**.

   If you have selected to modify the hierarchy, then the Hierarchy Tree opens.

   If you have selected to upload data, then the file selection dialog is displayed.

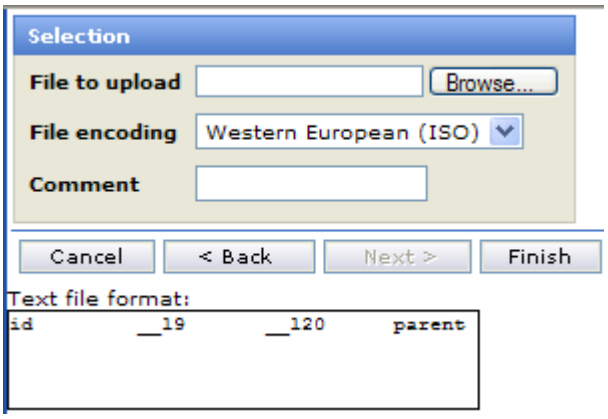


Figure 447 The wizard file selection dialog

Note: The file must be in the correct format or it will not be uploaded.

Browse to and select the desired file, select the appropriate encoding format and click **Finish** to complete the procedure.

The hierarchy can now be used as the answers to a question.

12.4.2. Balanced Hierarchy

If you wish to set up a balanced hierarchy, you must first have a schema in which the hierarchy is to be created, then you must create a separate table for each level in the hierarchy (see How to Insert a New Table on page 401 for more information). For example, if “Continents” is the top-level, “Countries” could be the level below.

To add a new table to a schema:

1. Go to the Tables tab.
2. Click **Add Table**.
3. Type the name of the table into the Table Name field.

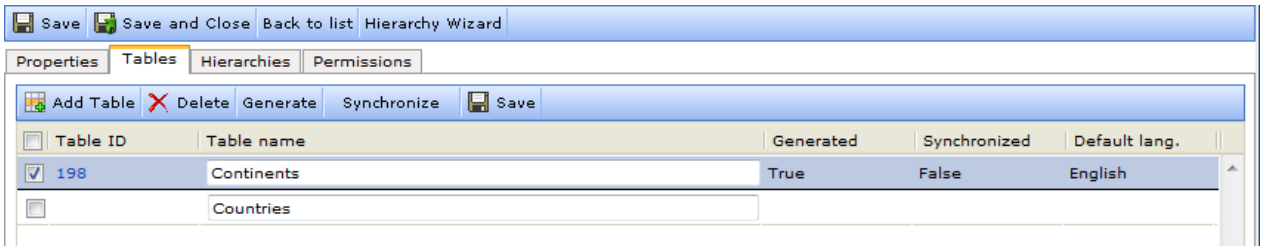


Figure 448 Adding a table

4. Click **Save** to save the changes.
5. Click the table ID to edit the properties of the new table.

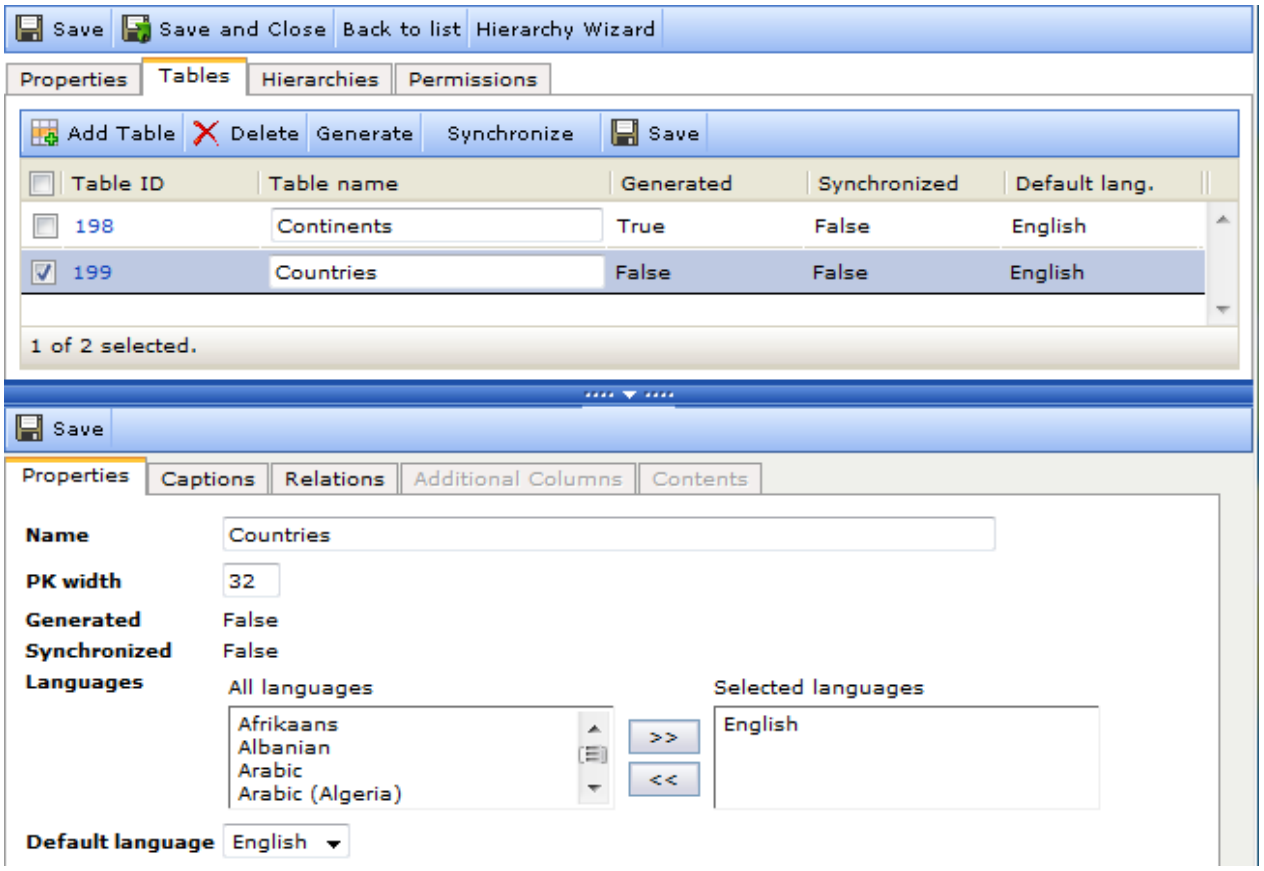


Figure 449 The table properties

6. Select the required languages.
7. In the event more than one language is selected, go to the Captions tab and enter caption texts for the "non-default" languages.

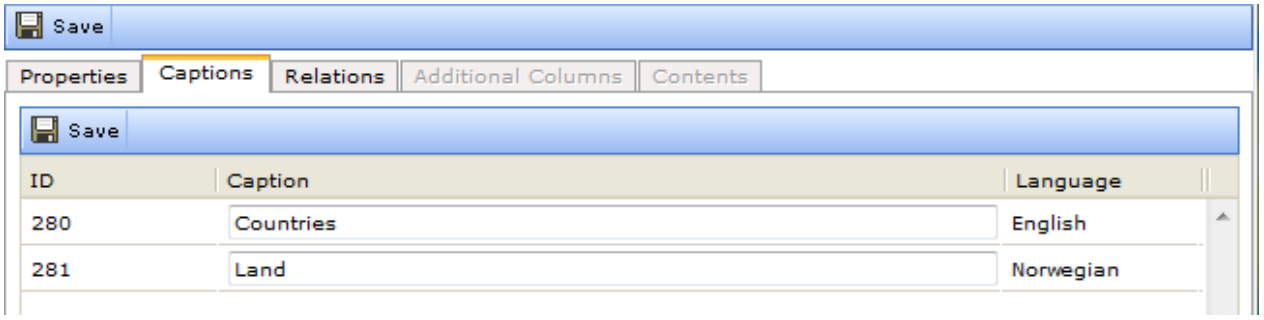


Figure 450 The Captions tab

In the Relations tab you specify the relationship between the tables. In this example, countries belong to continents; that is, “Continents” is the “parent” and “Countries” the “child”.

8. For the Countries table, go to the Relations tab.
9. Click **Add Relation** to set up a relationship, and give the relation a name (in this case “r1” is used).

10. Click in the Parent Table field to open a drop-down list of the available "parents", and define “Continents” as the parent table:



Figure 451 Setting up Relations

The “Required” setting defines whether or not a “parent” must be defined for each “child”. In this example every country should belong to a continent, so the "Required" property will be set.

Important:
The relationship name will be used as a column name in the table, so use only alphanumeric characters and underscore in the relationship name.

11. Save the relationship, then generate the table by selecting it in the table list and clicking **Generate**.

    In the Tables list, the Generated flag for the Countries table switches to True. Now, when you go to the “Contents” tab for the “Countries” table, you will see that the table will display the relationship as an additional column, after the id and the languages.

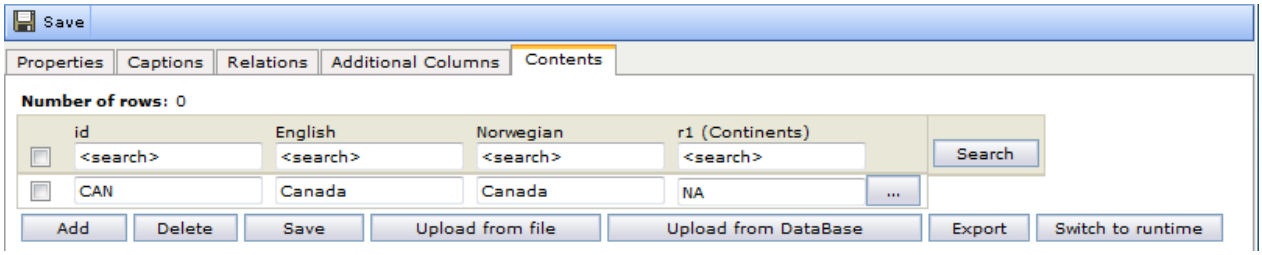


Figure 452 Table contents

Add ids and texts as previously described. The relationship is specified by the code of the continent (for example NA for North America from the previous example). You can also click the ellipses button (...) next to the relationship field to select from the list in the “Continents” table.

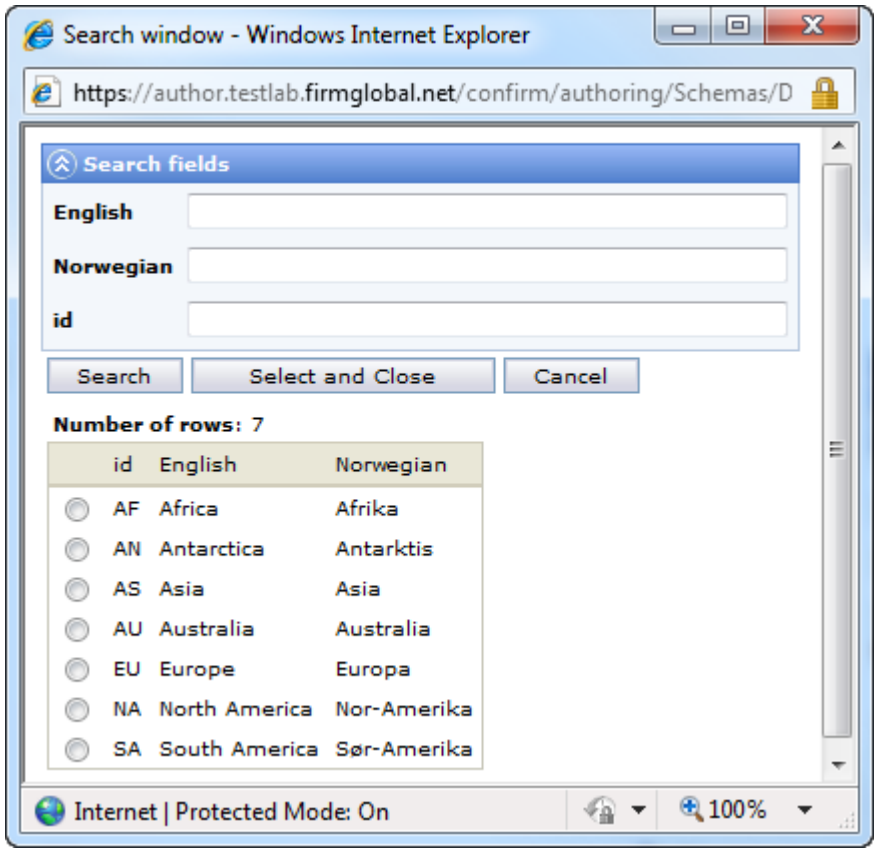


Figure 453 The Search window

In the event the selection list is extensive, you can search in the text fields in the different languages using * as wildcard. If you leave the search fields empty, the entire list will be presented. Select one of the items and click **Select and Close**. When finished with the entire list, click **Save** and then synchronize the table.

You could then add for example regions or cities as the next levels in the hierarchy in another table. However for simplicity this example will be a hierarchy with only two levels.

The next step is to define the hierarchy. This is done in the Hierarchy tab in the table list.

1. In the Tables list, go to the Hierarchies tab.
2. To add a new hierarchy, click **Add Hierarchy**.

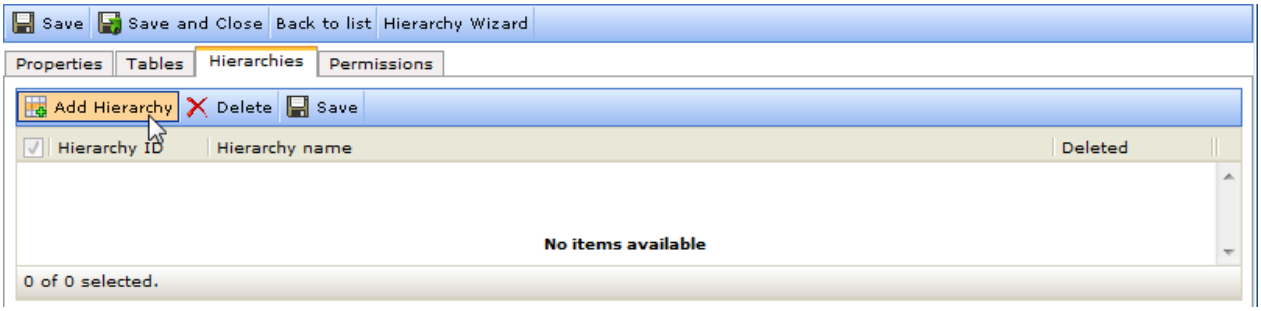


Figure 454 Adding a hierarchy

3. Click into the Hierarchy Name field and type in a name for the hierarchy, then click **Save**.

To set up the properties of the hierarchy, click the blue hierarchy id link (it turns orange on mouse-over).

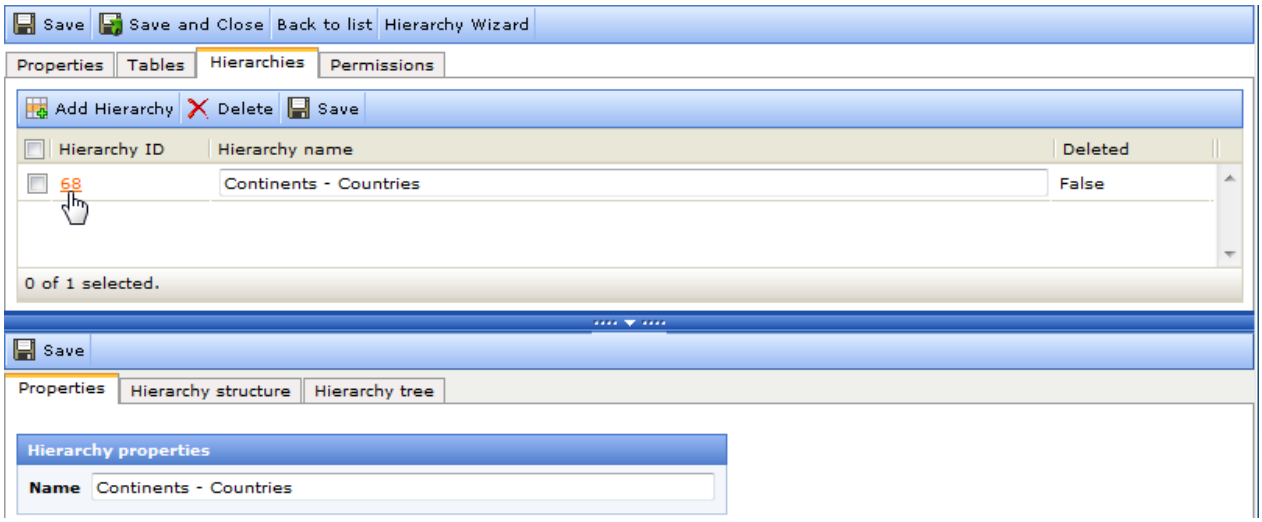


Figure 455 Adding a hierarchy to the database

In the Hierarchy structure tab you select the hierarchy from the available relationships set up in the database. To do this:

Select a “child” or “sub”-node at any level within the tree except the top level. In this case, select the relationship from “Countries” to “Continents” by expanding the tree by clicking the + next to “Continents”, then clicking “Countries” and **Save**. This would seem like an unnecessary step for a simple table structure like the one we have set up, but a database schema like this could contain a lot of different tables with different relationships in different levels, so you could have a lot of different structures to choose from in your schema.

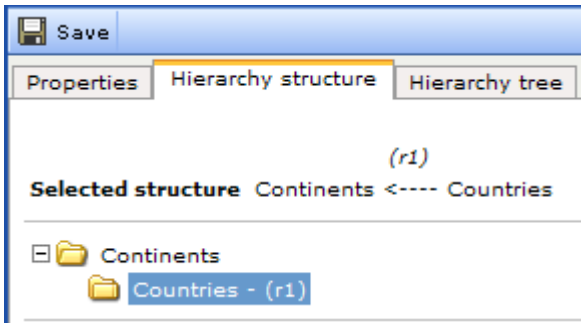


Figure 456 The Hierarchy structure

12.4.3. Unbalanced Hierarchy

An unbalanced hierarchy is a hierarchy where all levels are defined in the same table. This type of hierarchy is also called "self-referenced". As an example, assume we have a company, called “The Company”, with the following organizational structure:

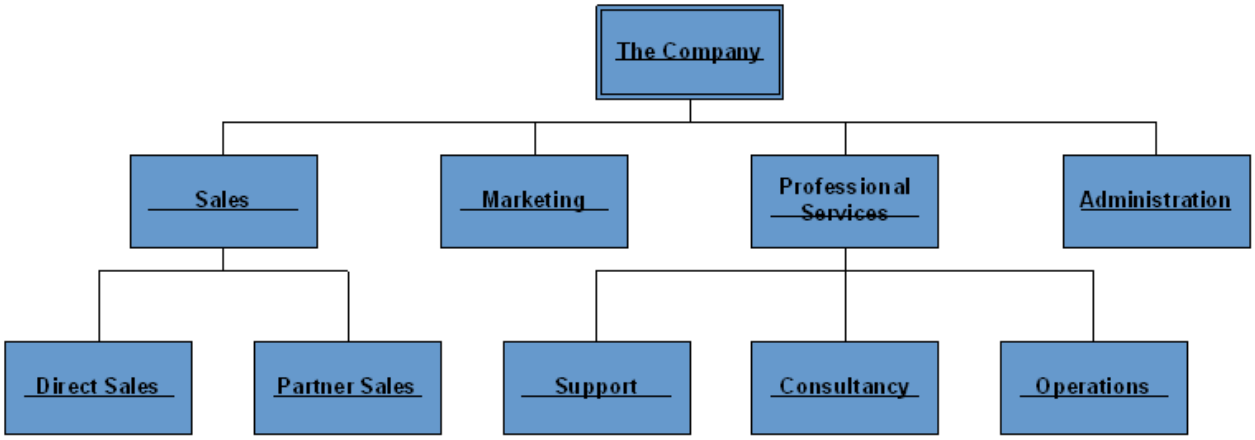


Figure 457 Example of organization hierarchy in "The Company"

This hierarchy will be set up in the table “CompanyTable”.

1. In the Database Designer, create and save a new schema.
2. Open the schema, go to the Tables tab and click **Add**, and give the table the name “CompanyTable”.

   The result should be as shown below.

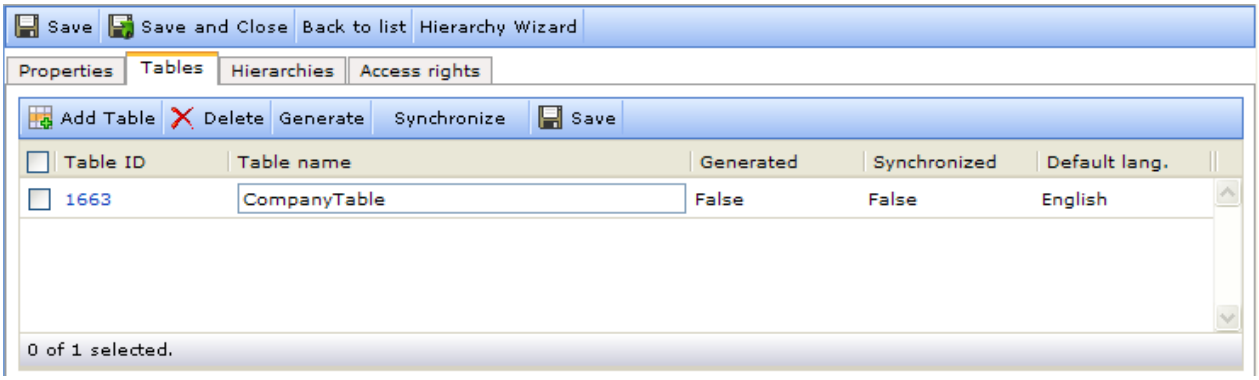


Figure 458 The table list

3. Click the table ID to open the table, then set up the language(s) you want to use.
4. If necessary, change the width of the “primary key” field that will hold the unique ids (codes) of the entities in the table.
5. Go to the Captions tab and assign name(s) to the table for the various languages you have selected.
6. Go to the Relations tab and add a relation to the same table (a self-referencing relation), and save:

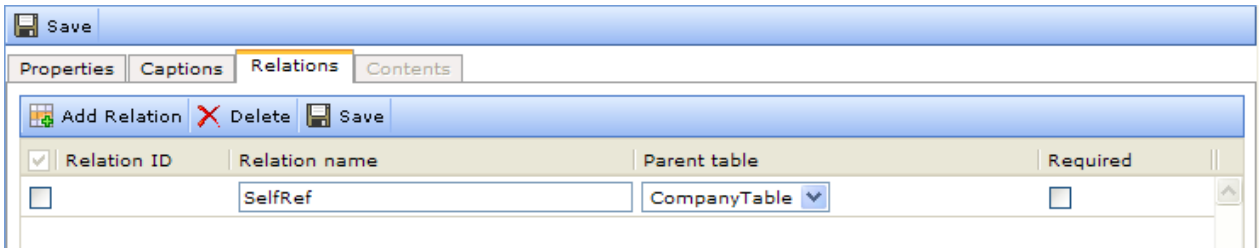


Figure 459 Setting up a self-referencing relation

Note: This relation must be set up as not required (do not check off the "Required" checkbox), because the top level does not have an entity above it to which it can refer.

7. Select the table in the table list by clicking in the left column next to it, and click the **Generate** button to set up the table.

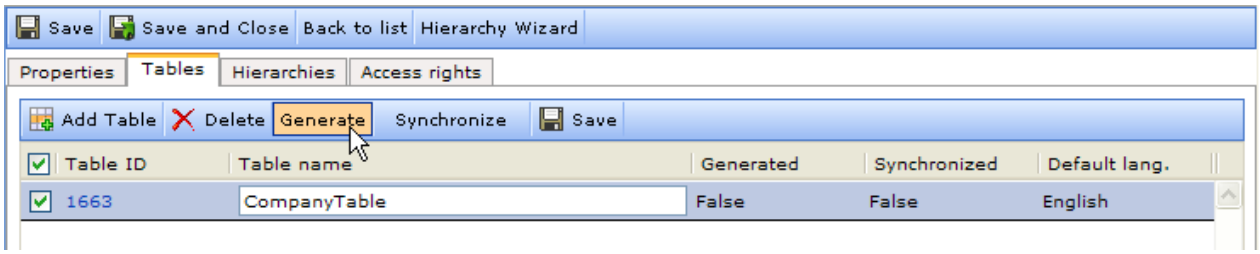


Figure 460 Generating the table

8. Then go back to the table (click on the Table ID) to define the table content (note that the Contents tab is not available until the table has been generated).
9. In the Contents tab, set up the hierarchy of "The company" with the following table:

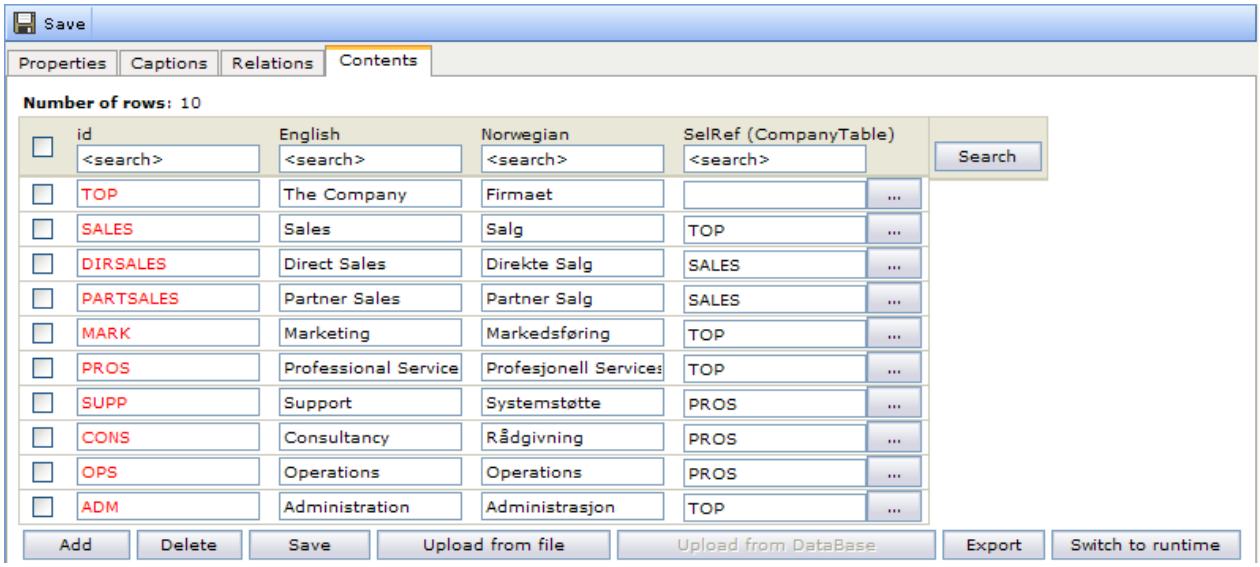


Figure 461 A self-referencing table

Note: You can add data to the table directly by typing it in, by copying and pasting from a file, or by importing a file.

10. To define this set up as a hierarchy, select the Hierarchies tab in the schema designer, click **Add Hierarchy** to add a hierarchy, give the hierarchy a name and then click **Save**:

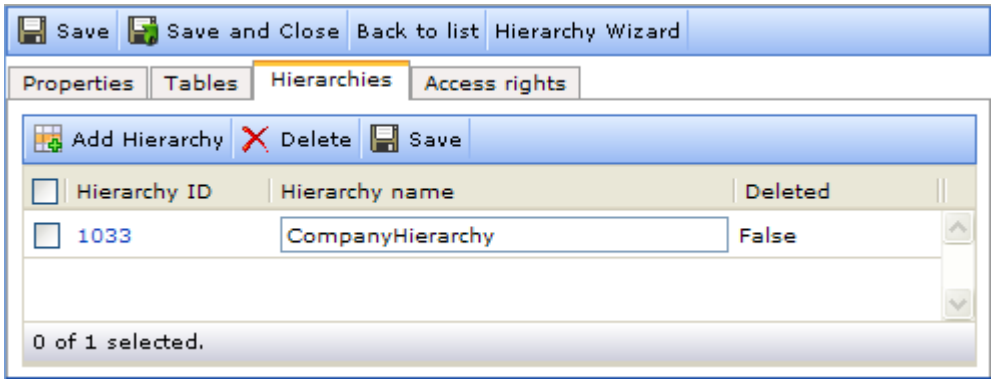


Figure 462 Adding hierarchy

11. Click the hierarchy ID and go to the “Hierarchy structure” tab to select the self-referencing relation in the “companytable”. Then click **Save**:

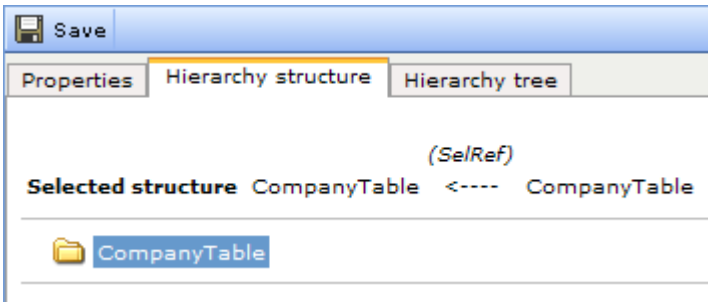


Figure 463 Selecting relations in the hierarchy

The Hierarchy Tree tab displays the hierarchy as a tree structure, as shown in the example below.

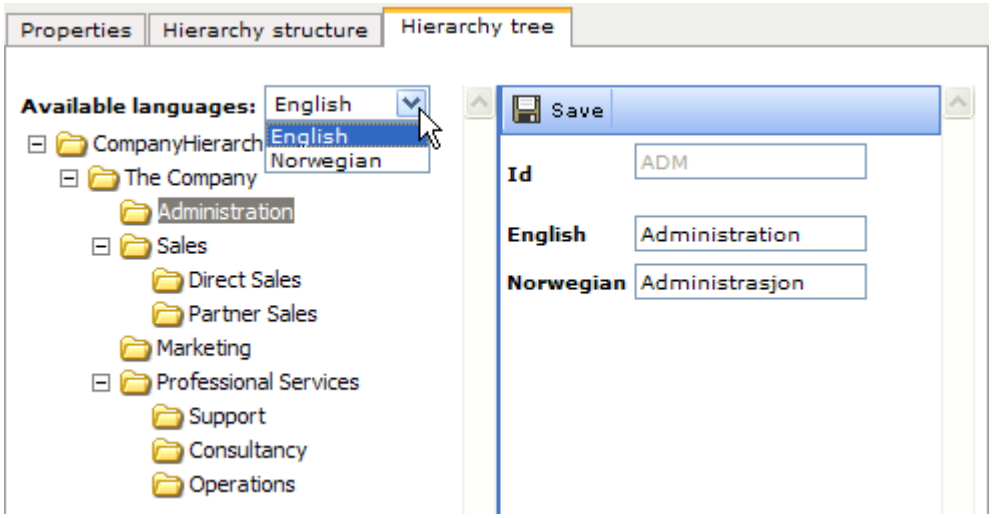


Figure 464 Example of the Hierarchy Tree tab

Here you can rearrange the nodes in the hierarchy by dragging and dropping them as required, and select the display language from the drop-down list. You can also edit the node texts - click on a text to open the editing pane for that item.

12.4.4. Survey Messages in Hierarchies

Balanced hierarchies will have text appearing above each drop-down. This text comes from the caption text associated with the table. Unbalanced hierarchies do not have this caption.

Two survey messages are available to control the default text when the question is rendered (see Survey Messages on page 190 for more information). These can therefore be customized on a language basis, not on a question-by-question basis. The rules for the text that appears are:

- If a question is required but "Force lowest level" is disabled, then the first drop-down will have the text “– Select –”. All other levels will have “– Optional –”.
- If a question is optional and "Force lowest level" is disabled, then all drop-downs will have the text “– Optional –”.
- If a question is required and "Force lowest level" is enabled, then all drop-downs will have the text “– Select –”.
- If a question is optional and "Force lowest level" is enabled, then the first drop-down will have the text “– Optional –”. All others will have “– Select –”.

12.5. Using Table or Hierarchy Lookups in the Questionnaire

The tables or hierarchies can be used in single questions in the questionnaire. In a single question's Properties page, go to the Answers drop-down list and choose between **Normal answer list**, **Table lookup** and **Hierarchy lookup**.

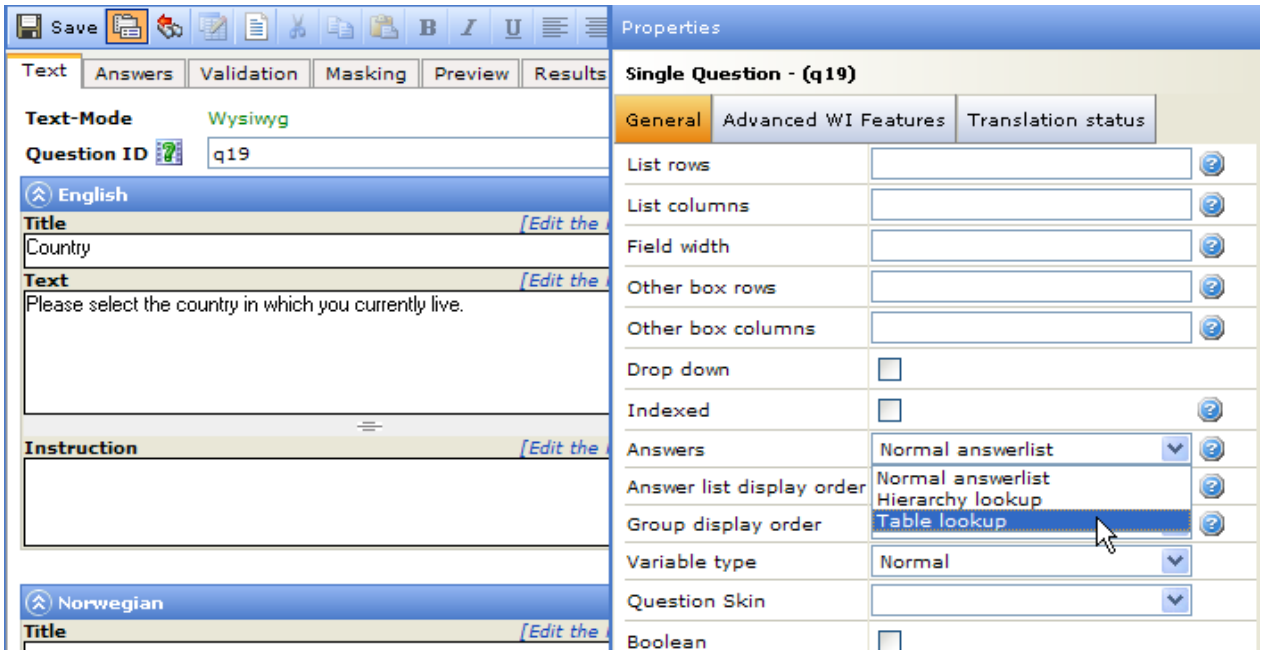


Figure 465 Selecting the desired Answers property

Note: If Hierarchy Lookup is selected, the order in which answers are displayed in the hierarchy will adhere to the Answer List Display Order property. If "Alphabetically sorted" is selected, the answers will be sorted alphabetically. However by default the answers will be displayed in the order in which they appear in the Database Designer.

12.5.1. Normal Answer List

If you select Normal answer list, the answer list is inserted as usual in the “Answers” tab. This option is selected by default for the answer list, and results in a "standard" list of answers from which the respondent can make the desired selection(s).

12.5.2. Hierarchy Lookup

If you select **Hierarchy lookup**, the “Answers” tab will include an interface for selecting a database schema and a hierarchy from that schema (see Hierarchies on page 414 for more information).

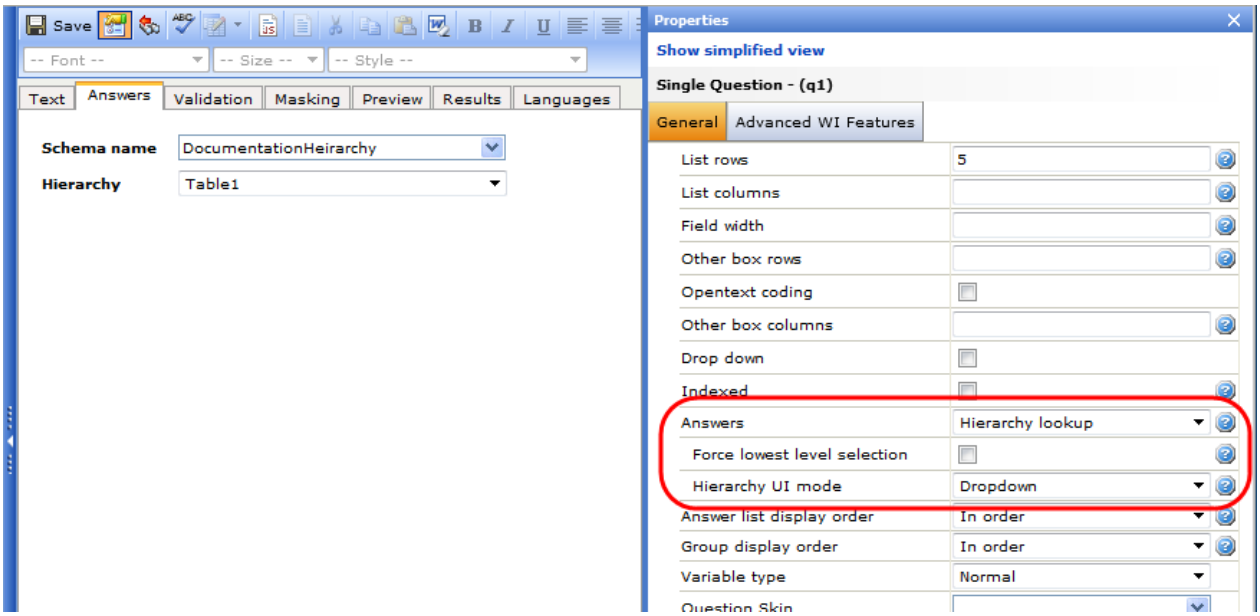


Figure 466 Selecting the Hierarchy for a "Hierarchy lookup" question type

The "Hierarchy Lookup" question type provides a choice of User Interface modes for the respondent.

By default the answers are presented as a **Dropdown** list. As the respondent makes a selection on the top level, any "sub-options" available for that selection are displayed, enabling the respondent to choose further. The texts that are displayed, in the examples below "- Select -" and "- Optional -", can be edited (see Survey Messages in Hierarchies on page 425 for more information).

Note: If Hierarchy Lookup is selected, the order in which the answers are displayed in the hierarchy will adhere to the Answer List Display Order property. If "Alphabetically sorted" is selected, the answers will be sorted alphabetically. However by default the answers will be displayed in the order in which they appear in the Database Designer.

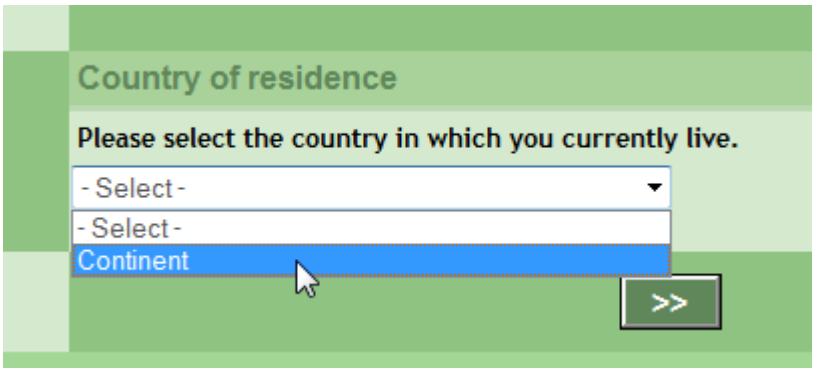


Figure 467 Example of selecting from a top-level hierarchy drop-down



Figure 468 In this case the drop-down has a second level...

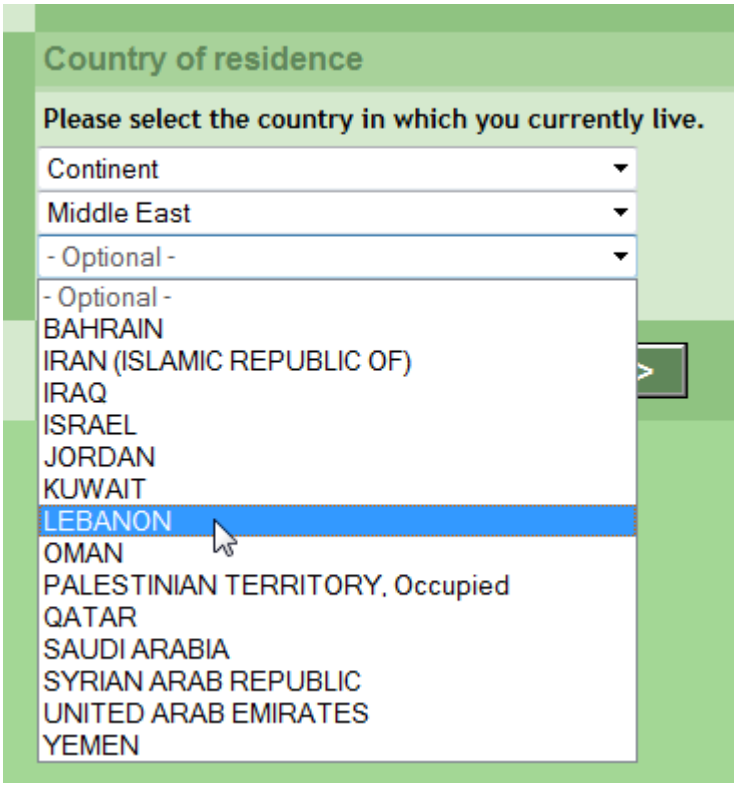


Figure 469 And a third

Note: Dropdown mode is supported in touch rendering, drilldown mode is not. Therefore for touch rendering, hierarchy questions will always appear in dropdown mode. Also, there are no search capabilities in dropdown mode; searching is available for drilldown mode.

In **Drilldown** mode, the respondent clicks down through the various levels until they reach the lowest level wherein they select the desired option.The "path" to the currently selected answer is displayed above the list, enabling the respondent to keep track of his/her current position in the hierarchy. The answers in all levels of the hierarchy are sorted alphabetically.

Note: This functionality requires that the respondent has a JavaScript-enabled browser. Recommended browsers are IE5, Netscape 6, Opera 7 or Mozilla.

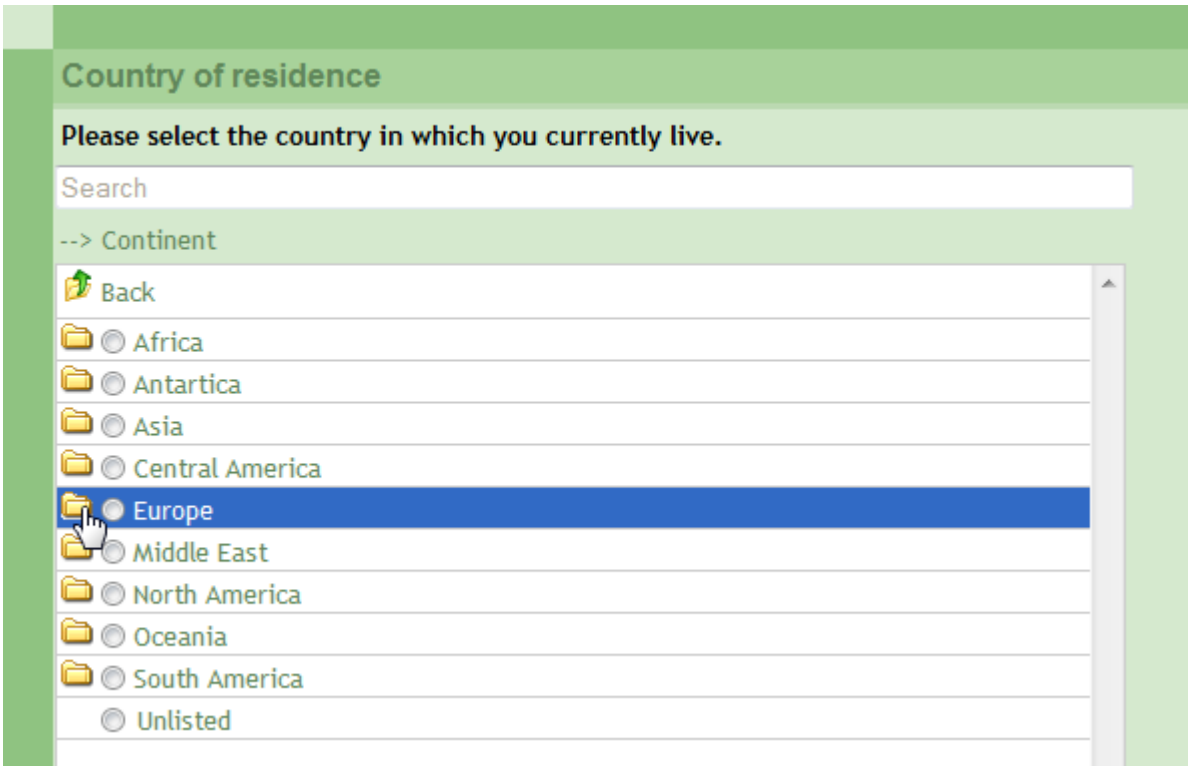


Figure 470 Example of the Respondent interface for a hierarchical question in Drilldown mode

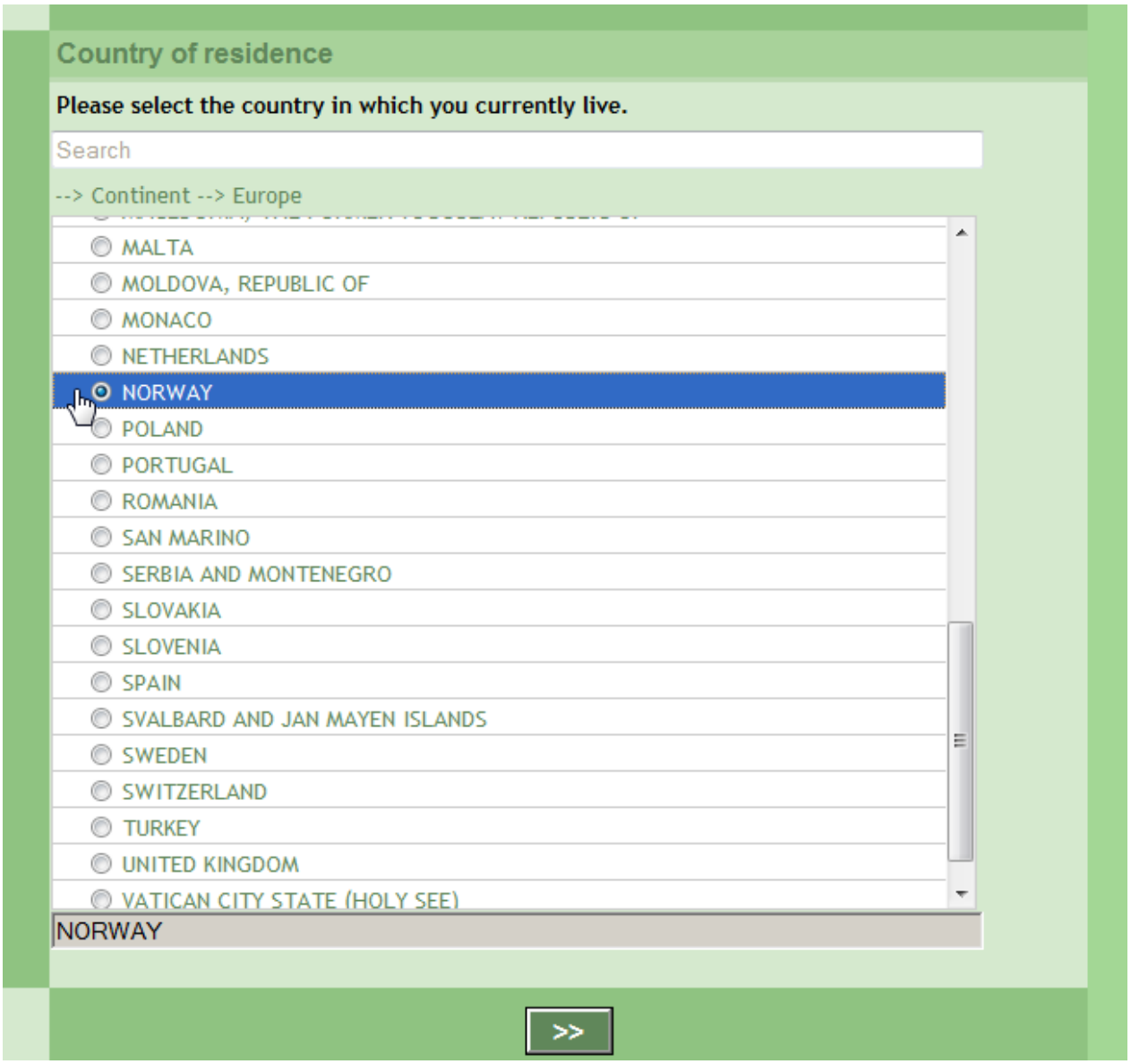


Figure 471 An item is selected

When the respondent has selected his/her answer, the text of that answer will appear in the text box below the question and the "path" to that answer is displayed above:

When you select Hierarchy Lookup, a further option appears in the Properties list - **Force lowest level selection** (see The General Tab on page 251 for more information). When this is selected, the respondent can move down through the hierarchy but can only actually select an answer from the lowest level. For example, if the hierarchy comprises Continents and Countries and the question asks the respondent to select his/her country of residence, then the respondent can click on a continent to "open" it such that he/she can view the countries, but he/she will only be able to actually select a country.

Note: When the answer option tables are created for a balanced hierarchy, any items in the top level that do not have items in the lowest level will not be displayed. For example, Antarctica is missing from the list of continents above (although it was included when the table was created, because the continent Antarctica does not have separate countries registered in the lower level. If you wish in this case to include Antarctica as an option, then you will also need to include Antarctica as a country in the Countries table, and register Antarctica as its continent.

Note: The Hierarchy question type is not supported in the CAPI/Kiosk console. Surveys that include hierarchy questions can be run on a CAPI/Kiosk console, but without the dynamic functionality.

12.5.3. Table Lookup

If you select **Table lookup**, the "Answers" tab will present an interface to enable you to select a database schema and one of the tables in that schema, as shown in the example below.

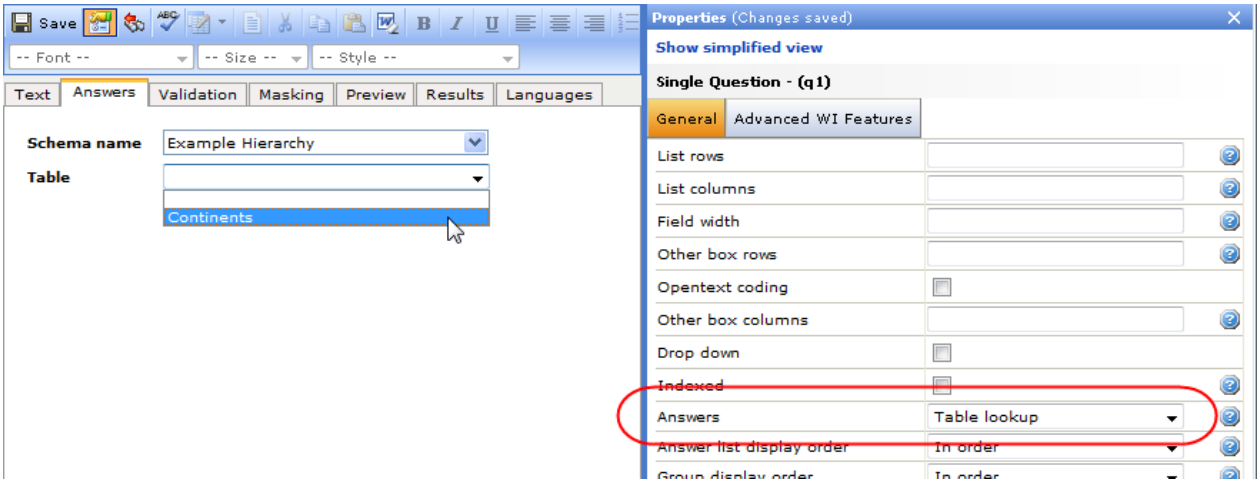


Figure 472 Selecting the table for "Table lookup"

The question will then be presented as an ordinary single question according to your settings in the Properties sheet, and will retrieve the answer list dynamically from the table in your database schema. The answers will be listed in the same order as in the table in the database designer.

12.6. Permissions

In the Permissions tab, you can give other Confirmit users access to the database you have set up. The functionality available here is essentially the same as that on the Permissions tab under Administration of End Users.

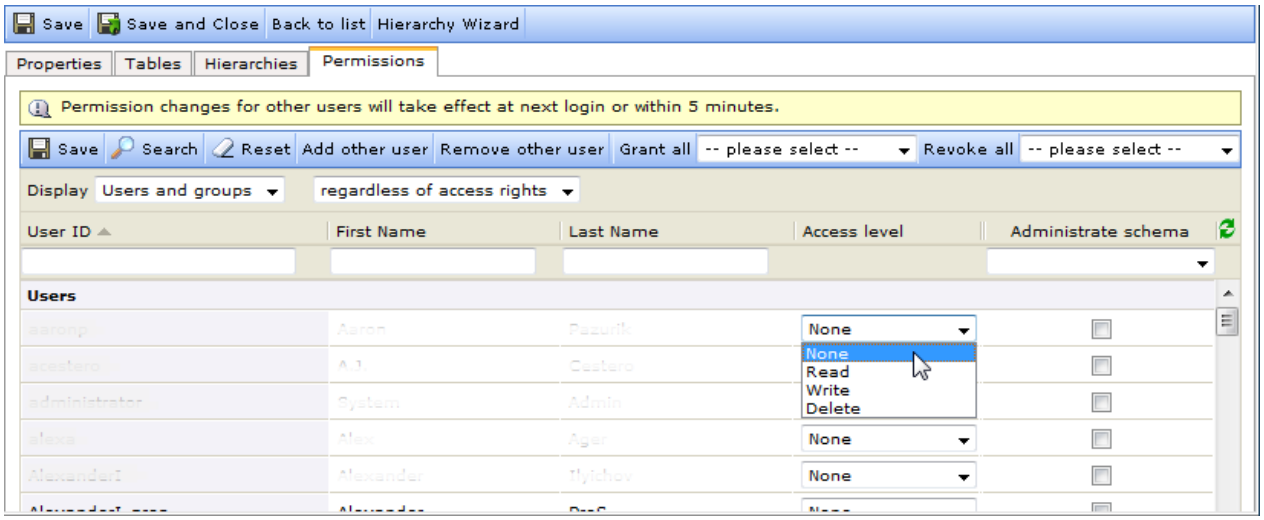


Figure 473 Example of the Access Rights tab for a table

The administrative options you can give to the various users listed are as follows:

- **None –** the default setting. The user has no administrative rights over the database and it will not show in their Database Designer list.
- **Read -** gives the user **Read** access to the database you have created.
- **Write –** gives the user **Write** access to the database you have created.
- **Delete –** gives the user **Delete** access to the database you have created.
- **Administrate schema –** check this box to give the user full administrative rights to the database. The user will then also have access to the Permissions tab, so will be able to give access to other users.
- **Add other user –** click to open a dialog that allows you to add users to the list.
- **Remove other user -** click to open a dialog that allows you to remove users that have previously been added.
- **Grant all -** select a permission from the drop-down beside this button and click the button to give that permission to all the currently listed users. Note that if you do not wish to give the selected permission to all users in your company then you must first conduct a search such that only the appropriate users are listed on the page.
- **Revoke all -** select a permission from the drop-down beside this button and click the button to remove that permission from all the currently listed users. Note that if you do not wish to remove the selected permission from all users in your company then you must first conduct a search such that only the appropriate users are listed on the page.

After making changes, click **Save** to save them.

In the event the list of users contains more than 50 names, the list will be displayed with 50 names per page. Click the Page arrows in the lower-right corner of the page to move between the pages.

The list can be sorted by the User ID, First Name and Last Name columns.

You can select to display various types of items in the list; click the down-arrow beside the Display field to open a list of options. The Assigned field allows you to select whether to include All items, or only those that have already been assigned permissions.

13. Translator

Note: Translator is a chargeable Add-On.

The Translator module allows people without Confirmit access to be engaged in translating Confirmit surveys. The translators will access surveys from a different interface via a URL sent to them by the survey manager. The changes made by the translators will be visible in the Authoring interface.

13.1. Entering Confirmit Translator

To enter Confirmit Translator:

1. Open the survey, then go to the **Translation > Settings** menu command.

   The Translation Overview page opens.

Note: To be able to assign translators to a survey, the survey must have at least two survey languages, one of which will be the default survey language. If you attempt to enter the Translator functionality from a survey with only one language, the following error message will be displayed:



Figure 474 The warning that appears when the survey is not multilingual

13.2. Assigning Translators to Surveys

When no translators have been assigned to a survey, the Translation Overview will look as shown below. The language status for all the questions for each language will be *Untouched.*

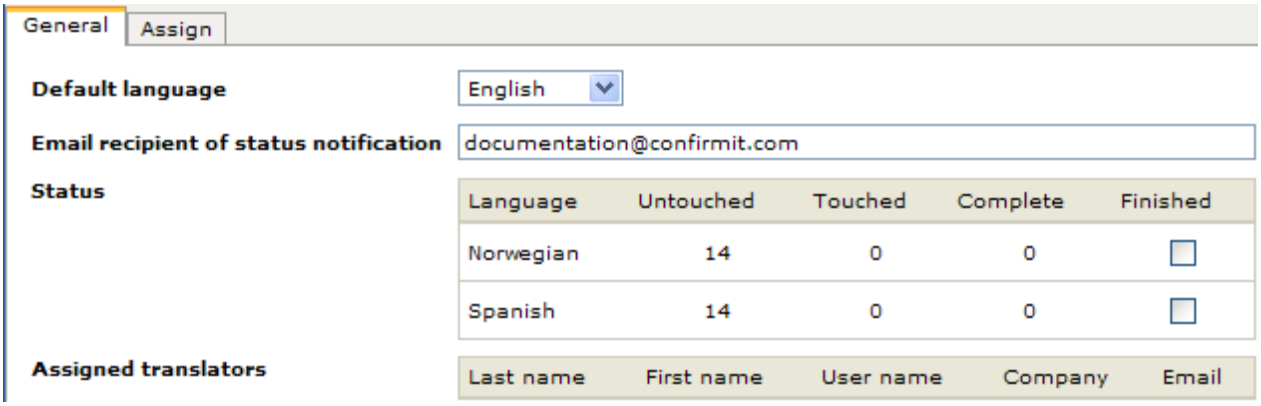


Figure 475 Translation overview with no assigned translators

1. In the *Email recipient of status notification* field, enter the email address of the person who is to receive the notification email when the translation is finished.
2. To assign translators, go to the *Assign* tab.
3. On this page, in the Available column, select the appropriate translators and click the **>>** button to move them to the Selected column.

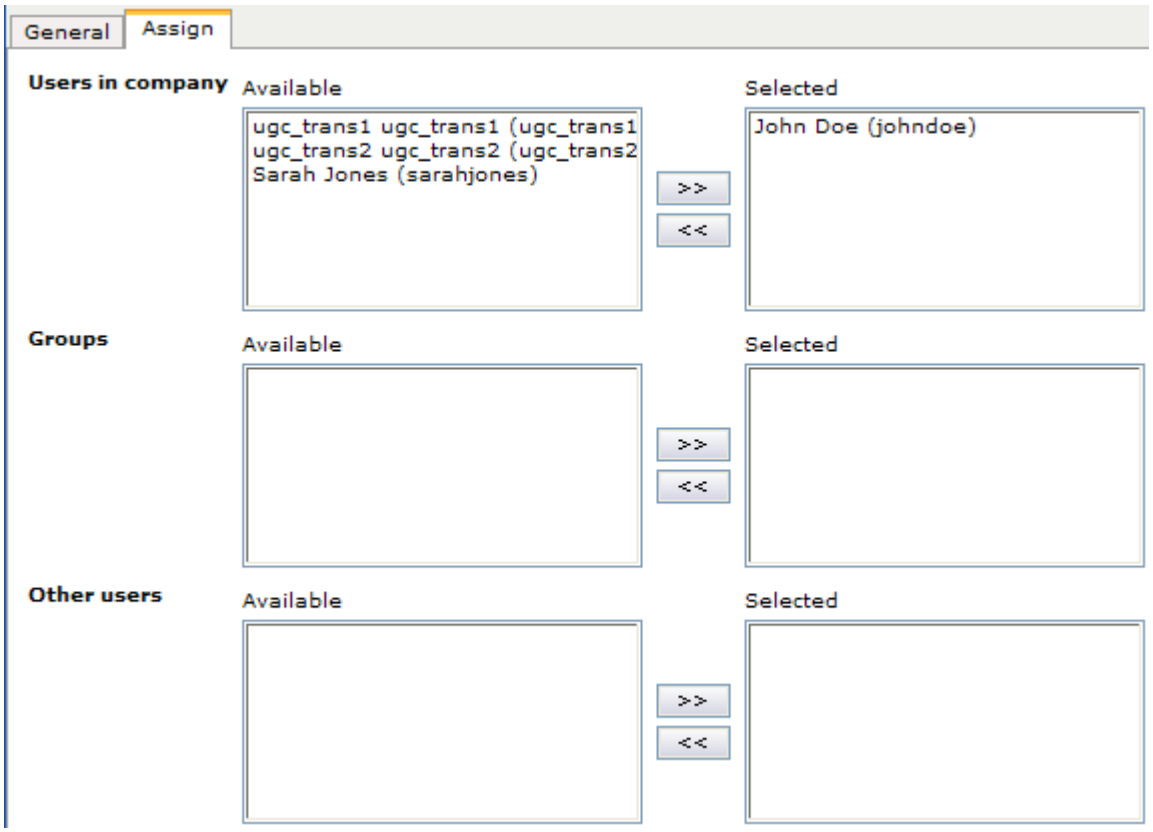


Figure 476 The Assign tab

If you return to the Translator Settings page after having select the translators, the translators will be displayed in the Assigned translators window as shown in the example below.

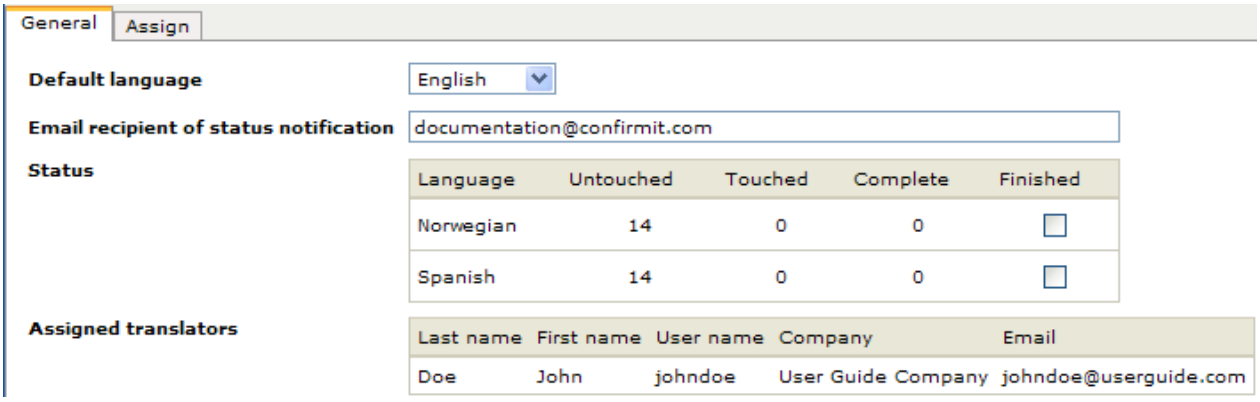


Figure 477 Example of the Translator Settings page with assigned translators

13.2.1. Assigning Translators from Another Company

You can give translator permissions to translators who are registered as users under another company on your server. Do this via the survey that is to be translated - the procedure is the same as when you give other uses permission to view and/or edit the survey (see Permissions on page 185 for more information).

To give permissions to a survey to users outside your company:

1. Go to the user's User Settings page and copy the User key as shown in the example below.



Figure 478 Copying a user key

2. Go to the Survey Overview page for the survey, and click the Permissions tab.
3. Scroll to the bottom of the page and click the **Add other users** link.

   A text input field appears.
4. Paste the User key into the field.

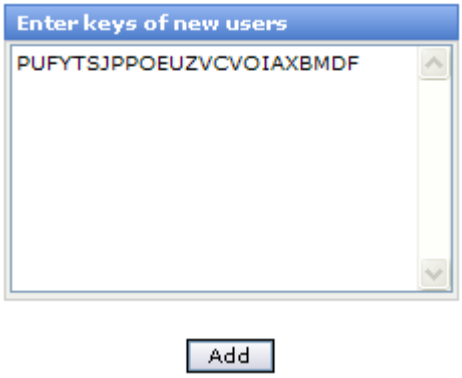


Figure 479 Pasting a User Key into the text field

Note: Ensure that you do not have any white-space before or after the User Key.

5. Click the **Add** button.

   The user is added to the Object permissions list under Other users/Groups.

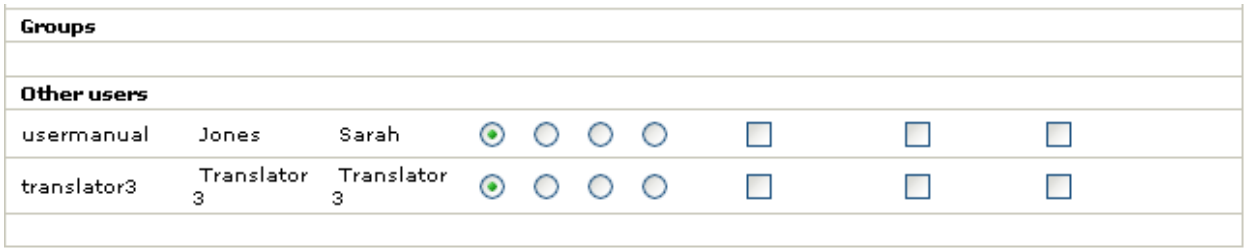


Figure 480 A user added under other users/groups

Now you can give the user Survey translator access. The user will be displayed in Translation overview under Assign Translators.

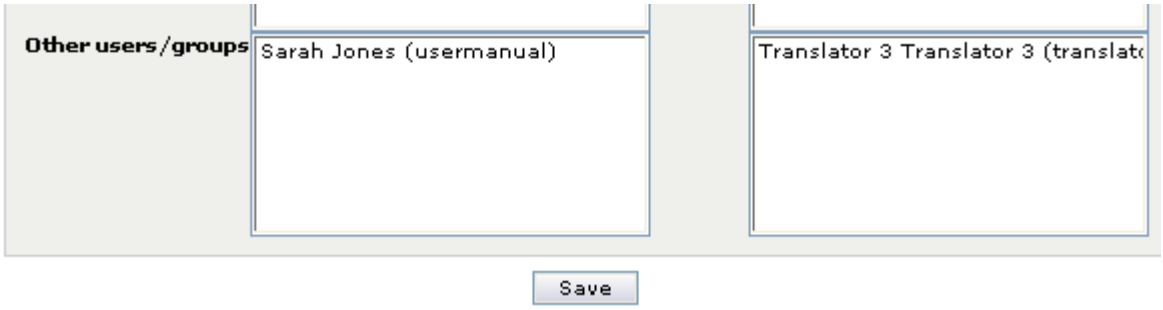


Figure 481 A new user displayed in Translation overview

When chosen, the translator will be shown on the first Translation overview page under Assigned Translators.

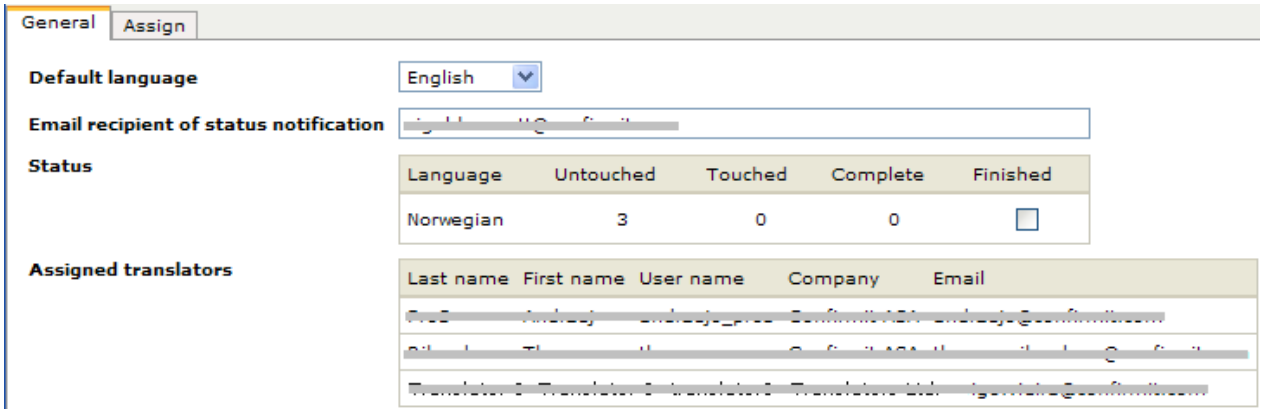


Figure 482 A new translator displayed in Assigned Translators

13.2.2. Assigning Groups of Translators

You can also give translator permissions to entire groups of translators who are users registered under different companies on your server. By adding translators to a group you avoid giving survey access to them on an individual level. Contact your Confirmit Administrator to create users and groups.

Note: The survey manager/administrator himself must be a member of the group to see the group in the survey Object permissions.

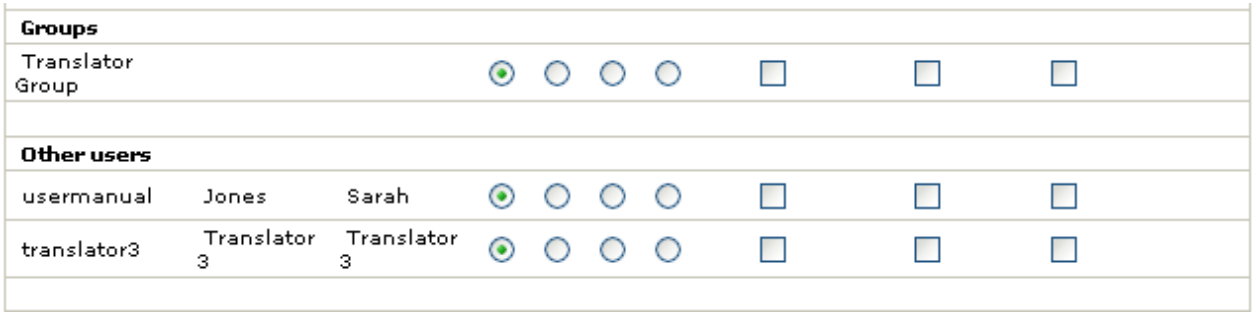


Figure 483 A Translator Group displayed in Object permissions

The new group will also be displayed in the Translation overview under Assign Translators.

Once the group has been assigned to the survey, all translators in the group will be displayed under Assigned Translators.

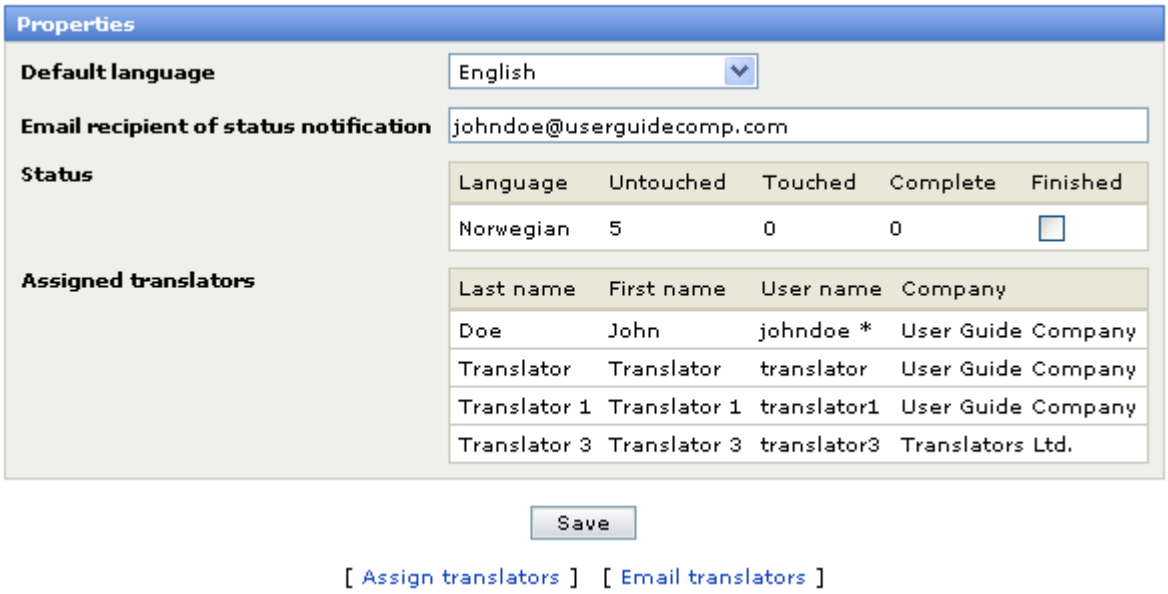


Figure 484 All translators in the group are displayed under Assigned translators

13.3. Emailing Surveys to Translators

Once the translators have been assigned, you can email them the link to the Translators interface.

1. Click the **Email translators** link in the Translation Overview.

   A page similar to the Confirmit respondent emailing page opens.

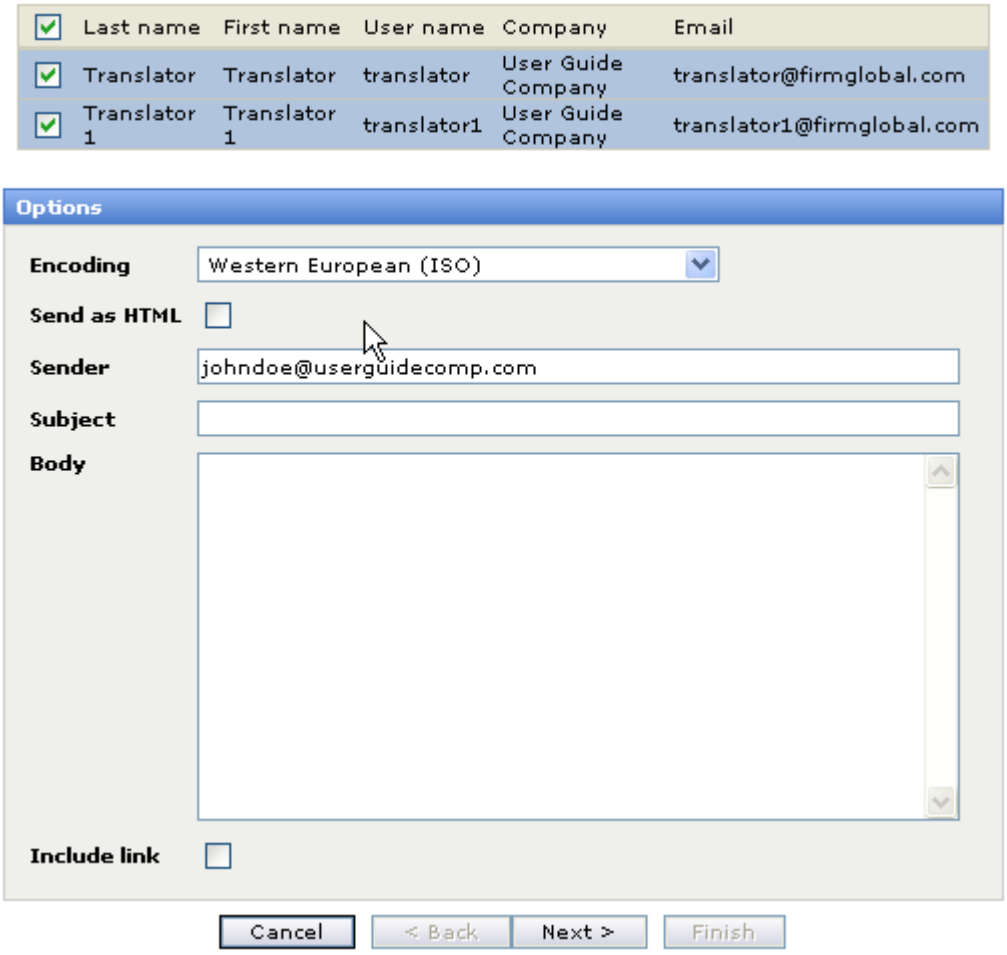


Figure 485 Selecting translators 1

2. Select the translators and define the other email properties.

   - **Encoding –** Choose the appropriate encoding when sending emails in Unicode languages.
   - **Send as HTML –** Emails may be sent as HTML codes. Check the "Send as HTML" box to send HTML coded email invitations. Comment: Not all mail systems will display such emails correctly. Use with caution. When used, "MIME" format should also be selected.
   - **Sender –** Enter the e-mail address that is to appear in the *From* header field in the e-mail. Bounce-backs and replies will be sent to this address. To show the name of the sender use this format: John Smith<email@address.com>
   - **Subject –** Enter the subject header of the e-mail.
   - **Body –** Enter the text that is to appear in the body of the e-mail message.
   - **Include link –** Select this checkbox to automatically have a link (URL) to the translator interface at the bottom of the e-mail (default).

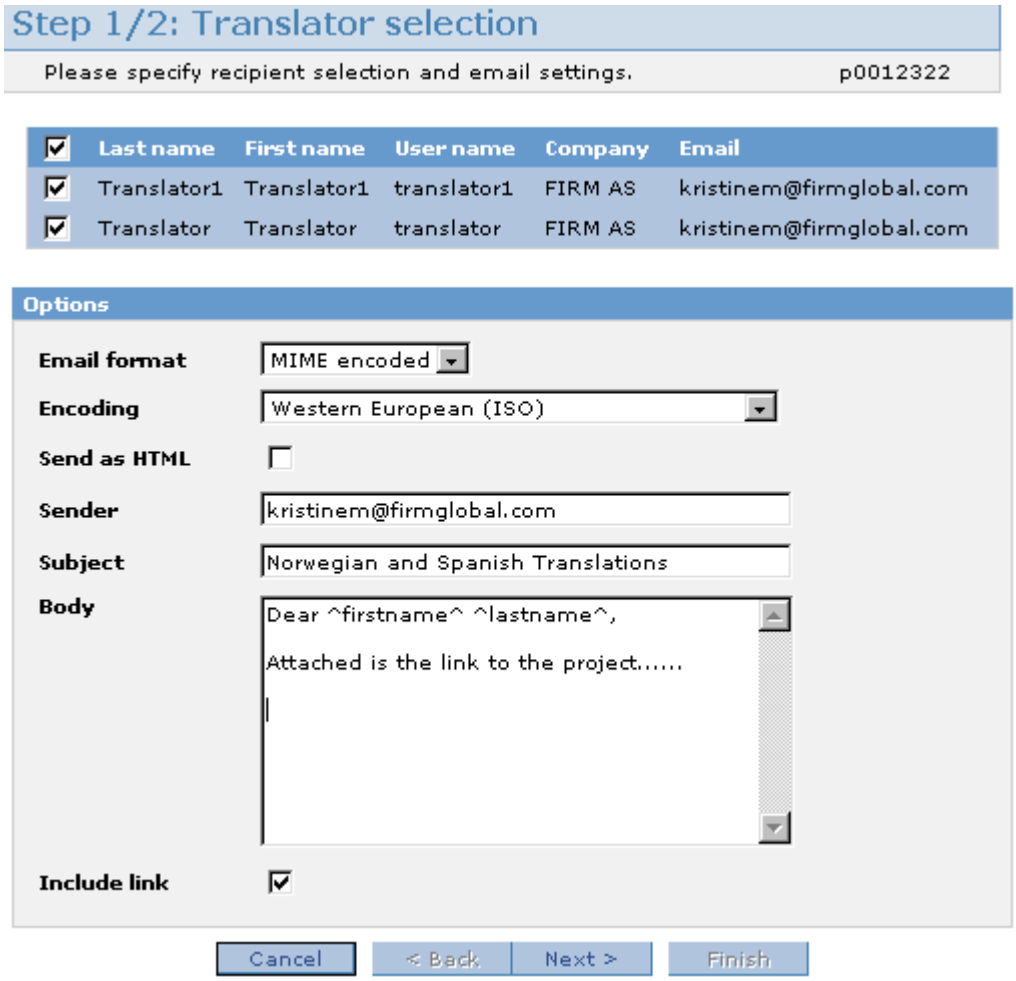


Figure 486 Selecting translators 2

In the email you can include information you have registered for the translator by using the following primitives:

```
^firstname^
^lastname^
^company^
^email^
^username^
```

Note: The password value cannot be piped into the email, and must be sent in a separate email.

3. Click **Next** to display the Preview and Send page.

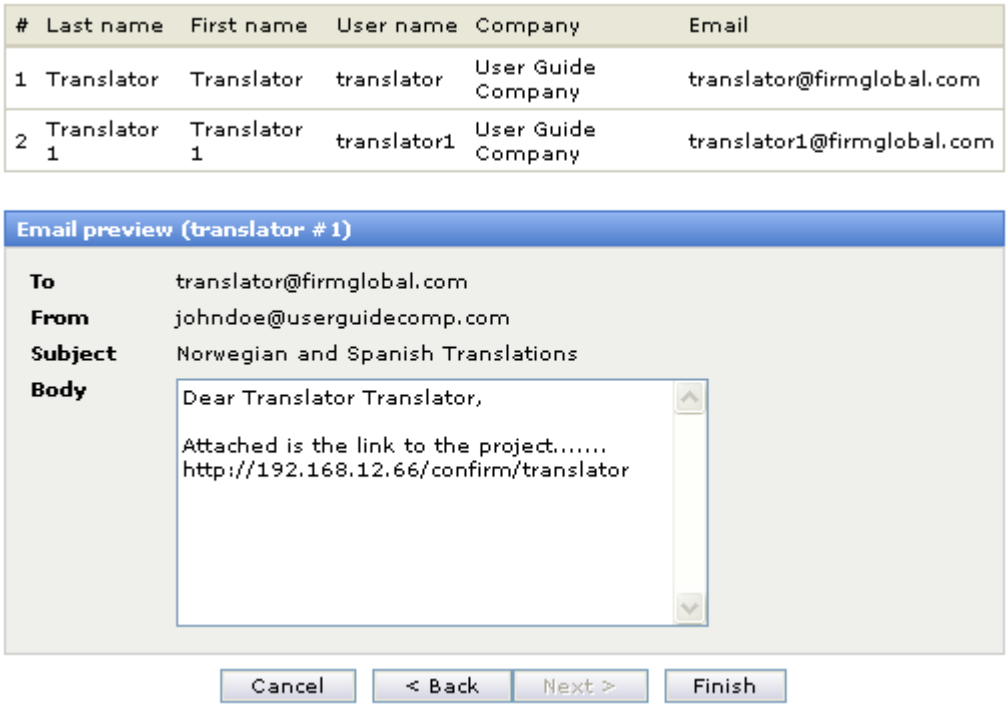


Figure 487 Preview and send

4. Click **Finish** to send the emails, click **Back** if you need to change to the email.

   On completion, a confirmation message is displayed.

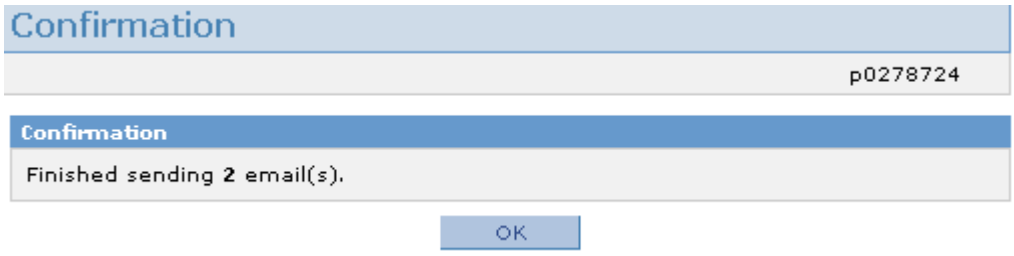


Figure 488 Example of the confirmation message

13.4. Translators' Interface

The translators enter the Translator via the URL in the email:

SaaS only:
USA Server: https://author.confirmit.com/confirm/translator/
Euro Server: https://author.euro.confirmit.com/confirm/translator/

For On-Premise customers, the address is: https://yourconfirmitserver.com/confirm/translator.

Confirmit authors access Translator by clicking the Translator link in the Confirmit menu.

1. Translators, click the link to display the login page.

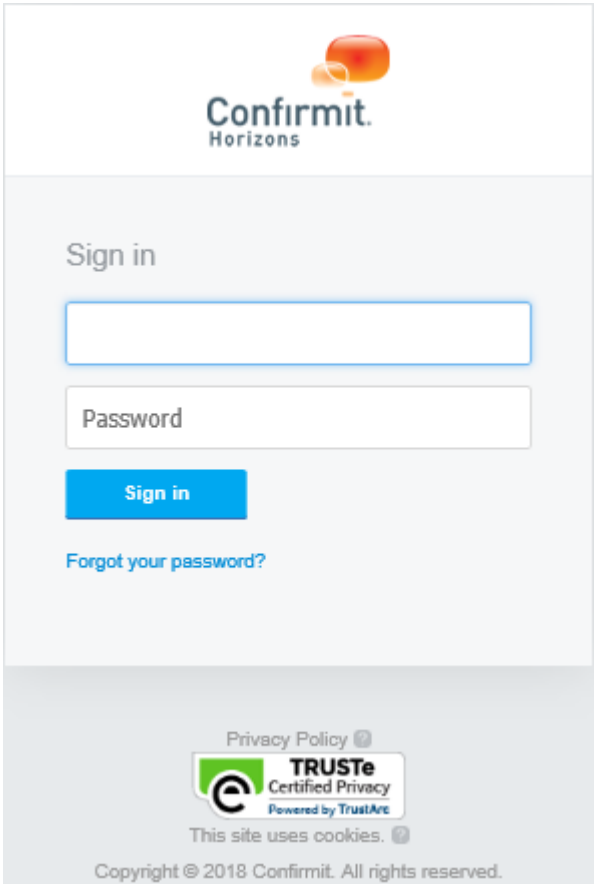


Figure 489 The Translator login overlay

2. Type your user name and password into the appropriate fields.

   The translators must log in using the userids and passwords they received in the email. They can change their passwords.

Note: For translator browser and other system requirements, refer to the separate Confirmit Horizons User System Requirements document that is available on the Confirmit extranet.

When a translator has logged into the application, he/she will be presented with a survey overview that will display all surveys they have been assigned to translate.

3. Click on the survey to display all survey languages except the default language in the right column.

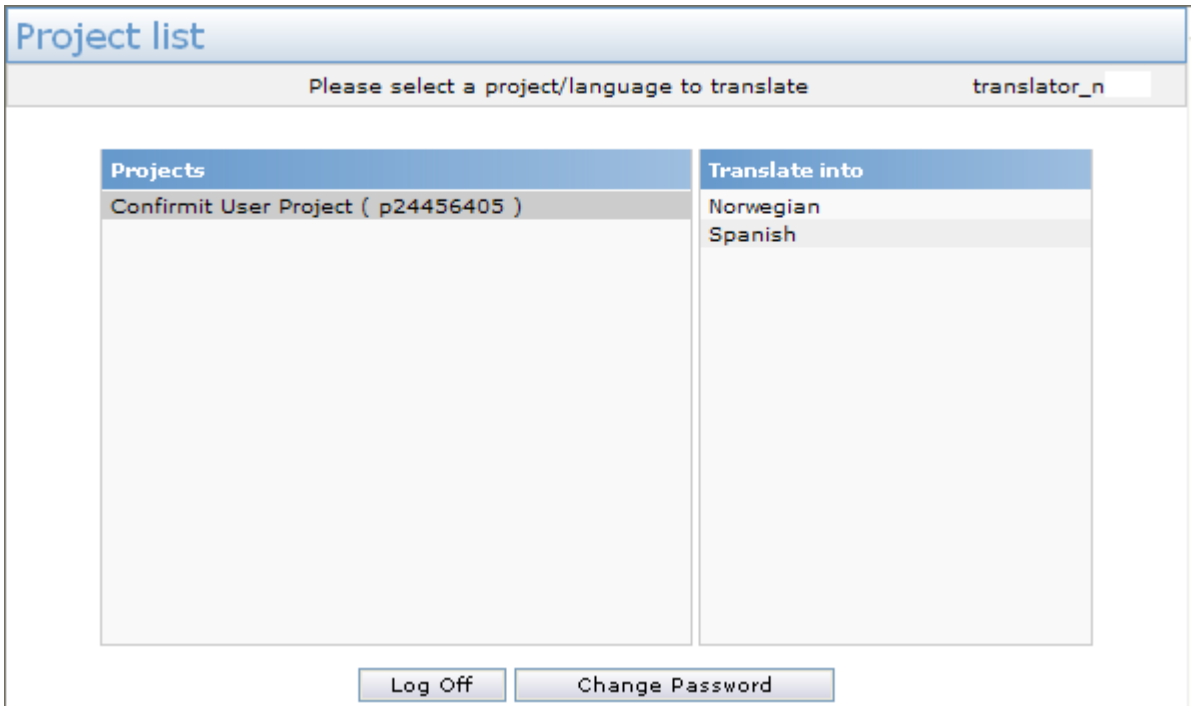


Figure 490 Example of a translators' survey list

13.4.1. Using Translator

When you have logged on to Translator, click on the language in the Survey List to display the Translator for this language. The page that opens is a WYSIWYG editor, enabling you to write and set up the text as required. The buttons inn the editor toolbar are standard Windows-style tools.

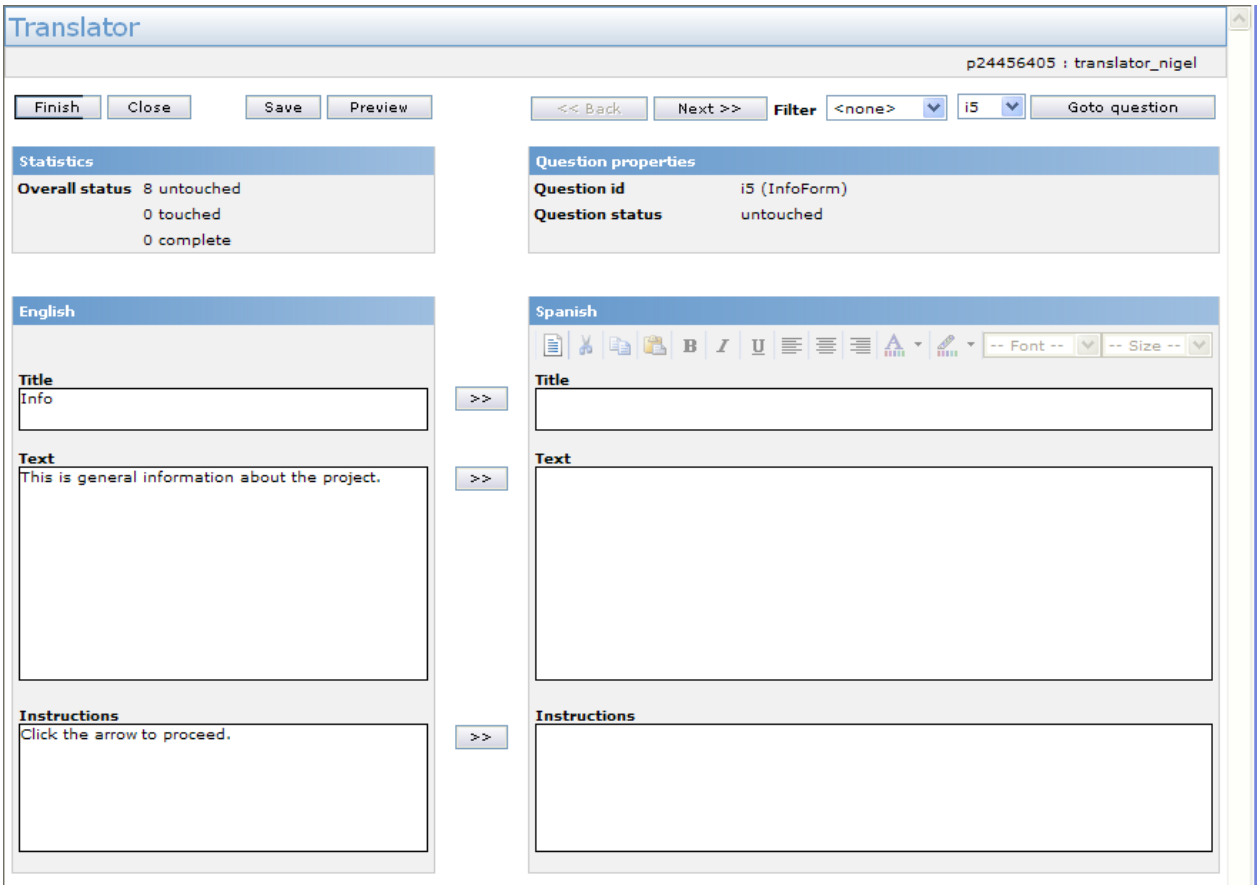


Figure 491 Example of the Translator page

The default language is displayed on the left. The buttons and fields are as follows:

- **Finish** - When you have finished translating the questionnaire, click **Finish**. The status will be updated in the Translation Overview in Confirmit, and a status notification email will be sent to the email address entered there.
- **Close** - takes you back to Survey Overview (any changes made are saved automatically).
- **Save** - saves the changes made to the working language.
- **Preview** - displays the preview of the question: the default language and the working language (any changes made are saved automatically).
- **Back** - returns to the previous question in the questionnaire routing (any changes made are saved automatically).
- **Next** - displays the next question in the questionnaire routing (any changes made are saved automatically).
- **Filter** - set filter to display only Touched, Untouched, or Complete questions.
- **Go to question** - choose a question from the drop-down to open that question in the Translator.
- **Overall Status** - indicates how many items (includes scales/lists) are Complete, Touched, or Untouched. The status is updated continuously as you move through the questionnaire.
- **Question ID** - Displays the ID of the current working question.
- **Question Status** - The status is automatically set to Complete, Touched, or Untouched.
    - **Untouched** if no translation has been entered in the target language.

- **Touched** if some fields have been translated.
- **Complete** if all fields from source language have been translated into the target language.

The predefined Scales/Lists are displayed first in the Translator. When the translator has finished translating the last question in the routing, the message *End of routing* is displayed.

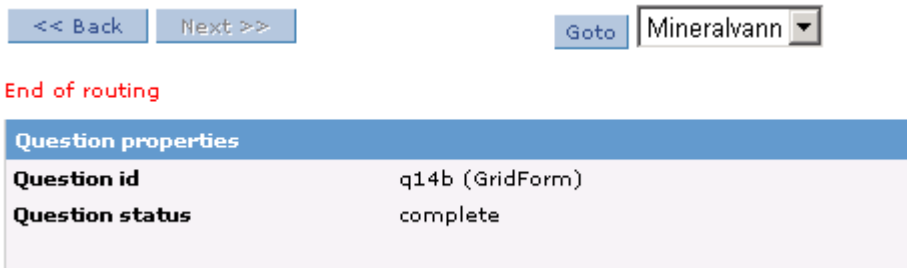


Figure 492 End of routing message in Translator

When the translator has finished translating the questionnaire, has saved the work, and clicks **Finish**, a message is sent to the Survey owner, for example "`Translator (translator1) has finished the Norwegian translation for project p0379335.`" The language that is completed is removed from the Survey List and the status is updated in the Translation Overview in Confirmit, as in the example below.



Figure 493 The translation is finished

Note: The survey manager can change the status for a language if necessary. To do this, uncheck the Finished checkbox and click Save.

14. Translation XML

Customers who have licensed the Translation add-on also have access to menu options enabling the export and import of XML files containing texts from the questionnaire. This functionality is an alternative to using the translator interface, and it allows you to perform translations off-line and import them back into the survey's survey definition. Access to the XML export/import function is controlled by a user-permission when setting up the license so that customers can control which users can access the feature.

Note: Email invitations and Email node objects created in Confirmit Designer are not included in the Export Translation XML, but can be translated via the Translator module instead (or within Designer).

1. When you have created the survey definition in the base language, for example English, go to the **Translation** menu and select **Export Translation XML**.

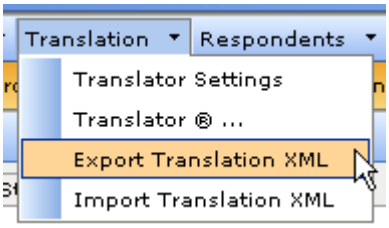


Figure 494 Selecting Export Translation XML

Note: You do not have to select the other survey languages in Survey Management > Overview > Languages. These will be added automatically when you import the XML translations for these languages.

The.Export Translation XML overlay opens.

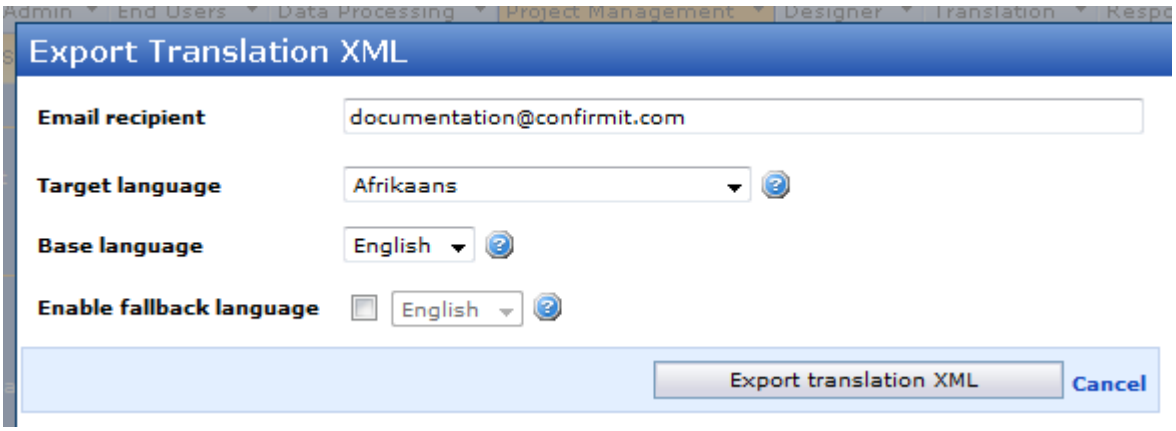


Figure 495 The Export Translation XML overlay

2. Specify the email address to which the XML file is to be exported.
3. Select the language from the **Target language** drop-down.

   Existing survey languages (added in **Survey Management > Overview > Languages**, but not necessarily containing texts in the survey definition) are displayed in the **Base language** drop-down.
4. Select the language that the translator is to use as the base language. Ensure that you choose a language in which the survey definition is complete!

If not all texts have been translated/filled in for the base language you have selected, the **fallback language** offers to fill in where there are blanks in the base language (provided that these texts exist for the fallback language).

5. On completion, click **OK**.

The following are some general guidelines to help you avoid errors and to ensure the best result when using the Translation XML functionality:

- Before translating a survey, always complete it in one language first.
    - Changing the survey while it is being translated may disturb the translation process. You may then have to translate the entire survey, or parts of it, again. It will also be very difficult to keep track of which parts of the survey have been translated and which have not. For example: if while someone is translating your survey from English to German you change the answers to a question, once the completed translation is uploaded, the answers will mean something entirely different in German than in English because the German translation is based on an earlier revision of the English version.
    - If you need to change the survey while in translation mode, you are recommended to make a new Translation XML export after all the changes have been completed.
- If possible, avoid duplicating a survey that will later be translated, and avoid basing your new survey on a duplicate of another survey.
    - Once a survey is duplicated, it will share survey elements with the duplicate. This means that the Object IDs of the various parts of the original version of the survey will be the same as those of the duplicate (these are the same as the Object IDs used in the TranslationXML). However, once an object in either the original or the duplicate changes, it will be assigned a new Object ID as it can no longer share this object with the original/duplicate. If you were translating a survey in TranslationXML at this point, the Object ID of that object would now be invalid. This is not a major concern as the primary identifier for a survey element is its name. However there are a few survey elements (answers, scales, predefined list elements) that do not have their own names, and if these elements' Object IDs have changed, they will try to use the code attribute as the identifier. So, if you need to duplicate the survey, make sure all answers and scales use codes.
    - An alternative to duplicating the survey is to export the survey definition and then import it back. This has exactly the same effect, but avoids the above-mentioned problem.
- Use only one translation tool for one survey; do not use Translation XML, Translator, and direct translation in the designer at the same time. This will introduce undesired side effects and make it very difficult to keep track of which part of the survey has the latest translation in a given language.
- Always use codes on Answers, Predefined Lists, and Scales when building the survey. This will reduce the possibility of undesired side effects when making changes in the survey while it is being translated.
- Script nodes are not included in TranslationXML. Any language-transparent text in script nodes must be avoided. Script nodes are not set up to have a different version for each language (as for example a question title is). It is therefore very difficult and cumbersome to maintain language-sensitive texts in script nodes.
- Never translate the name attribute of an element in the Translation XML. This is the primary element identifier and if this is changed you may experience problems during the import.
- Validate and verify the TranslationXML before uploading it.
- Review the survey log to see the changes that were applied on a TranslationXML import.
- The simplest way to add a new language to the survey is to order a TranslationXML export with the new desired language as the target language, translate this, and import it back in.

When the translator receives the XML file, he/she can start translating the base language texts into the target language. The name of the XML file indicates the target language. It usually consists of the survey ID and the Confirmit language code, for example pXXXXXXXX_20.xml, where 20 is the code for Norwegian.

When translating, the translator simply writes over the base language texts. The example below shows the translator overwriting the original Norwegian text with the English translation.

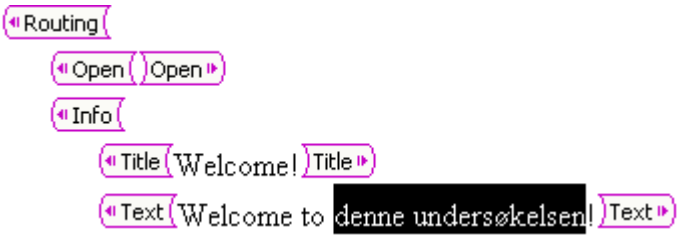


Figure 496 Translating in XML

When the translator has finished the translation, the XML file can be uploaded into the survey to add the new language. To achieve this, activate the survey then go to **Translation** and choose the **Import Translation XML** option, browse to the file, and upload it into the survey. The upload file may have any title, and it may be uploaded as an .xml file or a .zip file that contains an .xml file.

Note: If you leave a field blank in the Translation XML file and import it, this field may not be blank after the import. This is because during the import your Translation XML file is merged into the survey version of the base language you selected. Therefore if you have a Translation XML file where English is the base language and Norwegian is the target language and you leave, for example, the title of the first question blank before importing it back, it will use the English title. The title of that question will in other words never be overwritten with the text of the target language because the text of the target language is empty.

15. Confirmit Scripts

This manual provides only superficial information on scripting. Refer to the Confirmit Horizons Scripting Manual for details.

Most questionnaires contain some script code. Scripts are used:

- In conditions for controlling the flow through the questionnaire (skipping logic).
- In column masks (3D grids) and question masks to control whether or not a question should be displayed.
- To filter the lists displayed in questions and the iterations in loops based on previous answers (code masks/scale masks).
- In form elements for text substitution (response piping).
- For custom validation of user input.
- In general-purpose code contained in script nodes.

Confirmit uses the Microsoft JScript .NET scripting language. The runtime environment of the interview engine (or simply *the runtime*) supplies a number of functions and objects that provide references to survey variables and allow you to manipulate them.

This chapter describes briefly how to refer to survey variables. For more information on scripting in Confirmit, refer to the Confirmit Scripting Manual.

Confirmit uses the Syntax Highlighter functionality (see The Syntax Highlighter on page 469 for more information).

A syntax highlighter is enabled by default in all areas where scripts can be written. This includes Authoring script nodes, masking and validation scripting, as well as scripting in Reportal. When the syntax highlighter is in use, each time the **Tab** key is pressed, the line of script is indented one step. Each press of the **Shift-Tab** keys removes one indent from the line. Note that the **Tab** key does not insert a tab in the text.

To disable the syntax highlighting functionality, check “Disable script highlighting” in the User Settings overlay (see User Settings on page 134 for more information).

Note: The functions mentioned herein are described in the context in which they are most commonly used, and are not described in great detail. These functions are not restricted to being used in only this context. Refer to the Confirmit Horizons Scripting manual for further details.

15.1. Accessing Survey Variables – the f Function

The f function is used to access survey variable values, i.e. the answers given to a question. It will return values or sets depending on the type of variable it is used on.

15.1.1. f('qID')

Its basic syntax is **f("qID")**, where qID is the question ID specified in Properties (see Question Properties on page 251 for more information). The values returned are different for different question types.

Question type	**Values returned**
Single	The code of the answer.
Open, Numeric and Date	A string with the answer.
Multi	A set with the codes of the answers selected.

Ranking, OpenText List or Numeric List	A set with the codes of the elements in the answer list that are answered.
Grid	A set with the codes of the elements in the answer list that are answered.
"Other" from answer lists	A string with the text answered.

15.1.1.1. Single

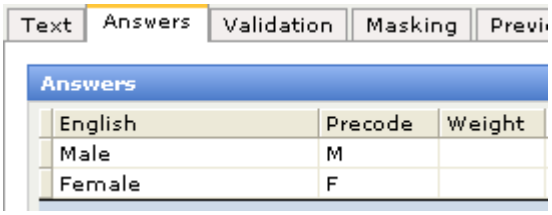


Figure 497 Example of an answer list for a single question "gender"

If the respondent answers **Male**, then the code `f("gender")` will return the value **M**.

15.1.1.2. Open Text

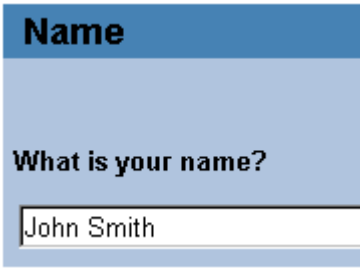


Figure 498 Open Text question "name"

In this case, the code `f("name")` will return **John Smith**.

15.1.1.3. Multi

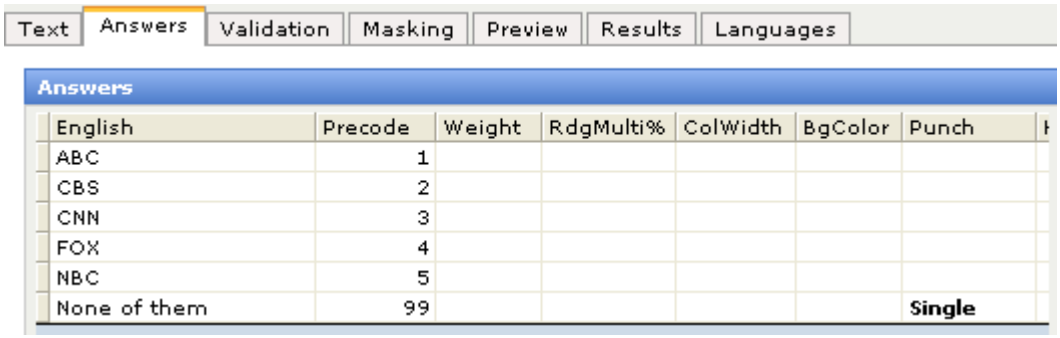


Figure 499 Example of an answer list for a multi question "TVchannels"

If the respondent answers **ABC**, **CNN** and **NBC**, then the code `f("TVchannels")` will return the set **1,3,5**. This answer list (and its codes) will also be used in the following examples.

15.1.1.4. Ranking or Open Text List

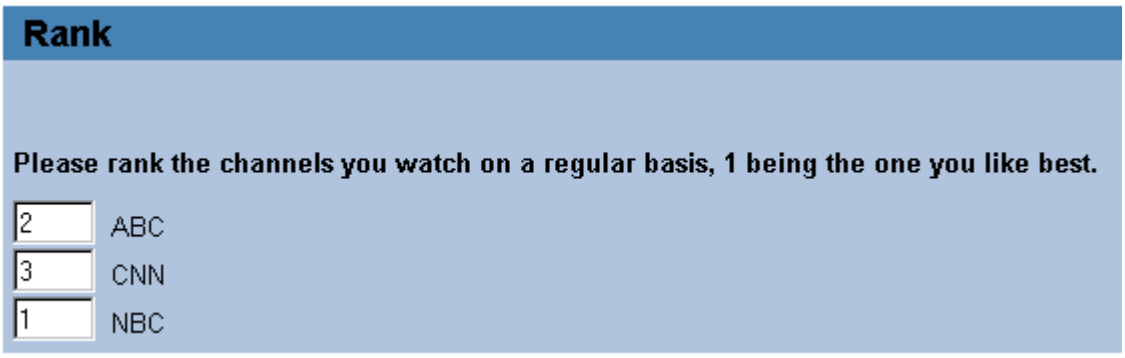


Figure 500 Example of a Ranking question

For a Ranking question, the respondent must provide consecutive answers in the range from 1 to the number of items in the list (in this case 3). The code `f("rank")` will return the codes of the items answered in the list, *1,3,5.*

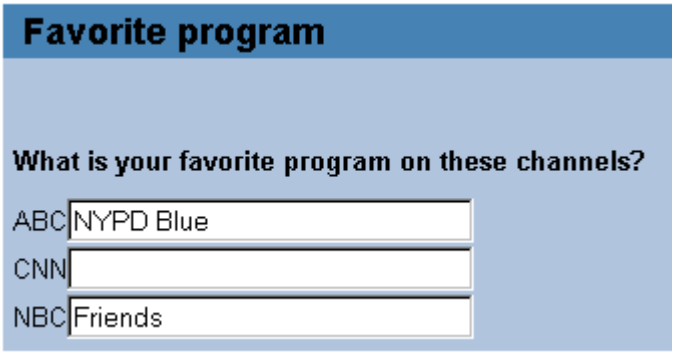


Figure 501 Example of an Open Text List question "program"

An **Open Text List** question will present the answer list with a text box after each item. If **Not required** is also checked, then the respondent will not have to answer the question. If the question is answered as in the example above, the code **`f("program")`** will return a set containing **1,5** (the codes of ABC and NBC are 1 and 5).

(Note that the answer lists of these two questions as well as the grid in next question are filtered based on the answers given on the multi question *TVchannels*(see Code and Scale Masks / Filtering Answer Lists / Scales on page 456 for more information)

15.1.1.5. Grid

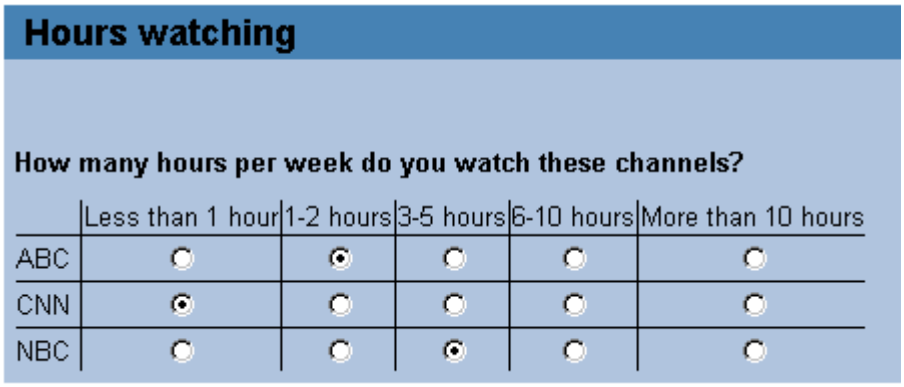


Figure 502 Example of the grid "hours"

Here the code **f("hours")** will return a set of codes from the answer list that has an answer, here it would be 1,3,5.

15.1.1.6. Other, Specify

Answers

English	Precode	Weight	RdgSingle%	ColWidth	BgColor	Punch	KeepPos	Other
ABC	1							
CBS	2							
CNN	3							
FOX	4							
NBC	5							
Other, specify	6							**Yes**
None of them	99							

Figure 503 Example of the answer list for the single question "favorite"

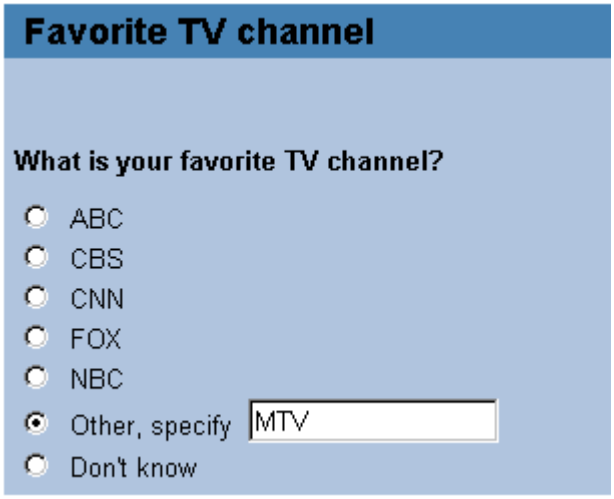


Figure 504 How the respondent will see the single question "favorite"

An Other text box will have the "question id"+_+"code"+_other as its variable name. In this case it would be *favorite_6_other*. The code **`f("favorite_6_other")`** will in here return the string **MTV**.

This syntax is useful when you wish to include the value the respondent enters into the **Other** text box as an answer alternative in a later question or in a loop.

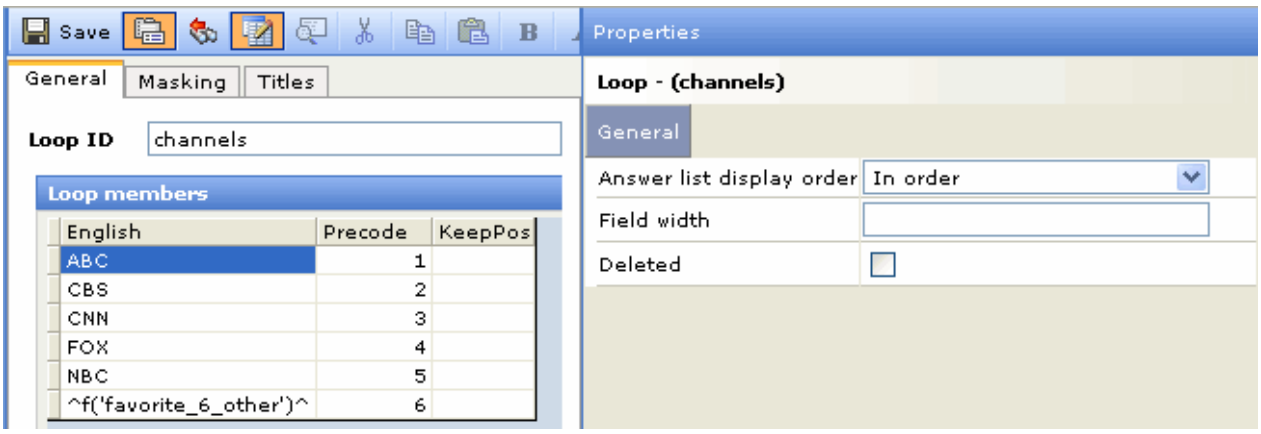


Figure 505 Other, specify in loops

In this case the text **MTV** will appear in the loop, not **Other, specify**.

15.1.2. f('qID')['code']

Multi, Open Text List, Numeric List, Ranking and Grid questions group one or more variables in the same form. The answers are stored in consecutive columns in the database (see Question Properties on page 251 for more information). To extract the answer from one item of a question of one of these types, use as the identifier the code of the item you wish to extract: **f("qID")["code"]**. The values returned from f("qID")["code"] for different question types are shown below:

Question type	Values returned

Multi	1 if the item with this code is checked off, 0 if it is not.
Ranking	A string with the value (rank) given to the item with this code.
OpenText List	A string with the text answered for the item with this code.
Numeric List	A string with the number answered for the item with this code.
Grid	The code (from scale) of the answer to the item with this code.

15.1.2.1. Multi

If we use the same example as in the Multi section, the multi question *TVchannels* where ABC, CNN and NBC are selected, **`f("TVchannels")["1"]`** will return 1 (since ABC is checked), **`f("TVchannels")["2"]`** will return 0 (since CBS is not selected).

15.1.2.2. Ranking

Using the same example as in the Ranking or Open Text List, the question *rank* where ABC was ranked as number 2, CNN as 3 and NBC as number 1, **`f("rank")["1"]`** will return 2 (because ABC was ranked as number 2), **`f("rank")["3"]`**will return 3 (CNN) and**`f("rank")["5"]`**will return 1 (NBC).

15.1.2.3. Open Text List

Using the multi question *program* from the Open Text List or Ranking section, **f("program")["1"]** will return *NYPD Blue*, **f("program")["3"]** will return an empty string (because the respondent did not answer anything for CNN) and **f("program")["5"]** will return *Friends*.

15.1.2.4. Grids

Using the answers from the grid shown in the Grid section, **`f("hours")["1"]`** will return 2. **`f("hours")["3"]`** will return 1 and `f("hours")["5"]` will return 3 provided that the scale of the grid is defined.

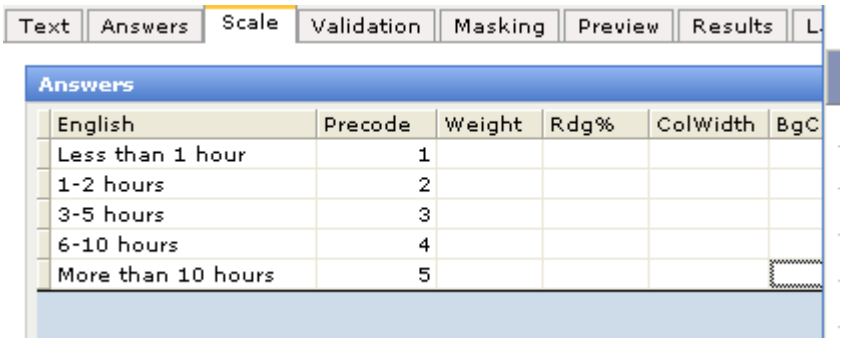


Figure 506 Scale of grid "hours"

15.1.3. Loops - f('qID','iteration_code','iteration_code',…..)

You refer to questions inside loops as described above, but you may want to be able to refer to the value in a specific iteration within a loop from another iteration or outside the loop.

For example, assume we have a loop that iterates through a list of channels in a multi question *TVchannels*. For each channel, a multi question *Types* is asked, and the respondent checks off different types of programs he/she likes to watch on that channel. Inside this loop there is a new loop iterating through the types of programs the respondent has checked off, and inside that loop the respondent is asked to rate the channel's programs of that type. In addition, if he/she awards a program a score 4 or 5, he/she is asked to give reasons for awarding that score.

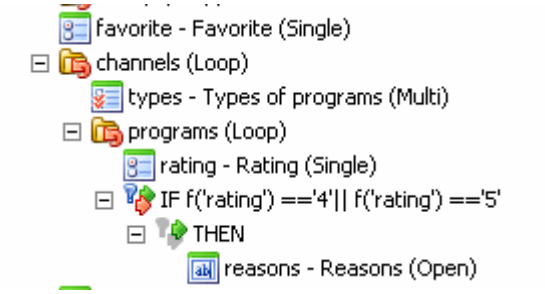


Figure 507 Nested loops

As you see from the IF-condition within the innermost loop, *rating* may be referenced as a normal single question, using **`f('rating')`**. This expression will give the value of *rating* within the current iteration. But if you want the value of *rating* in a different iteration, the "code" of that iteration must be specified. **`f("rating","1")`** will give the value of *rating* of "Sit-coms" (see the figure below) as this is the first iteration.



Figure 508 The inner loop, "programs"

This expression may be used within both loops. For the outer loop, the current value for "channels" will be used. However you may also specify the iteration of the outer loop (outside the loops, you must!).

`f("rating","1","5")` will give the rating of NBC's "Sit-coms" (see the figure below). Note the order - the innermost loop first. An expression such as **f("rating")** outside the loops would not make much sense.

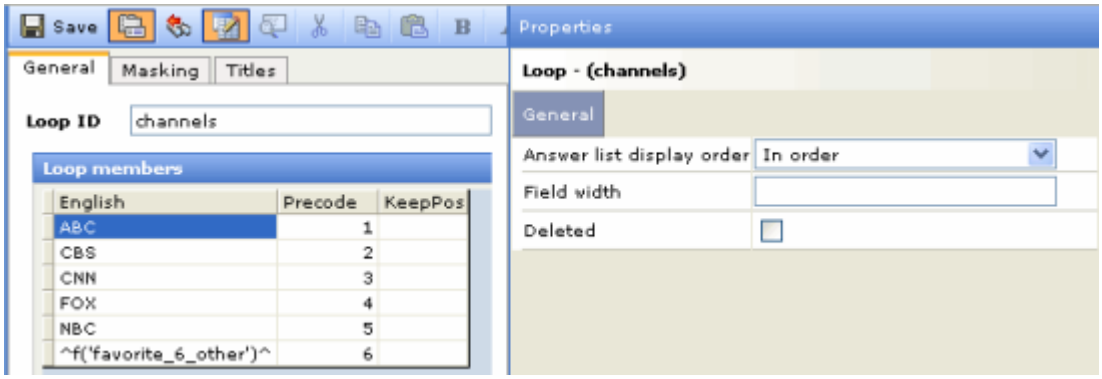


Figure 509 The outer loop, "channels"

Inside the loops you may refer to the current iteration with the syntax **`f("loopID")`**, for example **`f("channels")`** or **`f("programs")`**. The value returned will be the code of the current iteration (see Text Substitution/Response Piping on page 461 for more information).

15.2. Conditions

When making conditions, the following standard Jscript logical operators are useful:

Description	Symbol
Logical NOT	!
Less than	<
Greater than	>
Less than or equal to	<=
Greater than or equal to	>=
Equal to	==
Not equal to	!=
Logical AND	&&
Logical OR	||

15.2.1. .inc()

As described in the f("qID") section, f("qID") of **multi** question returns a set of the codes answered to question qID. If you want to test for a particular value, use .inc (includes). `f("qID").inc("code")` will return TRUE if "code" is one of the answers to qID.

15.2.2. .any()

If you want to test for any of a particular set of values, use .any.

f("qID").any("code1","code2","code3") will return TRUE if "code1", "code2" **or** "code2" are answered in qID.

15.2.3. .all()

If you want to test whether all of a set of values are answered, use .all.

f("qID").all("code1","code2","code3") will return TRUE if "code1", "code2" and "code3" all are answered in qID.

15.2.4. .none()

If you want to test whether none of a set of values are answered, use .none.

f("qID").none("code1","code2","code3") will return TRUE if **neither** "code1", "code2" **nor** "code3" are answered in qID

15.2.5. .between()

If you want to test whether a numeric response is within a particular range, use between.

f("qID").between(3,5) will return TRUE if the answer to the numeric question qid is greater than or equal to 3 and less than or equal to 5.

15.2.6. .size()

If you need a test on how many answers were selected on a multi question, you may use .size(). `f("qID").size()` returns the number of answers to the question qID. `f("qID").size() > 1` will return TRUE if qID has more than one answer.

15.2.7. .toNumber()

The .toNumber() method converts the variable to a number.

Example:

The "codes", i.e. the answers to questions, are always stored as strings and not numbers. This means that the f function always returns strings or sets of strings. You must therefore be careful when using the greater than (>) or less than (<) operators. If you consider how you sort items alphabetically (as in a dictionary), a sequence of numbers 1,2,3,…,10,11 will be sorted to: 1,10,11,2,3,…,9 when sorted as strings. So f('q1')<'3' will be TRUE for the numbers 1,10,11 and 2, and that was probably not your intention. You must therefore force the codes to numbers before running a condition with greater than or less than, using .toNumber() like this: f("q1").toNumber()<3. Using this, the expression will be true for 1 and 2, as expected.

15.3. Code and Scale Masks / Filtering Answer Lists / Scales

Code masks are used to filter the answer lists of 3D-grids, grids, single, multi, ranking, open text list and numeric list questions, and to select a set of iterations for a loop. In the code mask field in a question's Properties page (see Question Properties on page 251 for more information) or in the loop construct (see Loops on page 289 for more information) you may use a Jscript expression that evaluates to a set of codes. The answer list (or loop member list) will be filtered based on the set of codes in the Code mask field.

Scale masks are used to filter the scale lists of grid questions. Use the scale mask field in a grid question's Properties page (see Question Properties on page 251 for more information) to enter a Jscript expression that evaluates to a set of codes. The scale list will then be filtered based on this set of codes.

We have already seen how the f function evaluates to a set of codes when used on multi questions.

In the question "Tvchannels" from the Multi section, the respondent answered ABC, CNN and NBC (codes 1, 3 and 5.). In the next questions only these should appear. So in the code mask field of questions "rank" and "hours" from the Ranking or Open Text List section and the Grid section, the following expression was used: `f("Tvchannels")`. This expression gave a set with the codes 1, 3 and 5 and consequently only the items in the answer list matching those codes were displayed.

The following sections describe other functions that are useful when constructing sets of codes.

15.3.1. a('qID')

`a("qID")` returns the complete set of codes defined in the answer list belonging to qID, irrespective of whether or not they are answered.

15.3.2. set(), nset(), nnset()

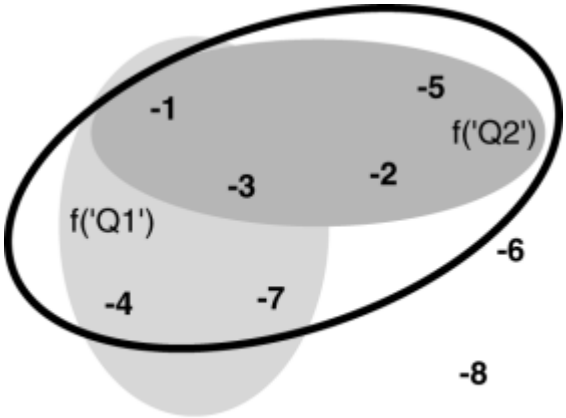
You may need to create sets yourself. The three functions described below should simplify this process.

- `set("code","code",…)` returns a set consisting of the codes you specify. `set("1","2","3")` gives the set consisting of the codes 1, 2 and 3.
- `nset(n)` returns a set populated with the members 1, 2, 3,…,n. `nset(3)` gives the same as the previous example, a set consisiting of the codes 1,2 and 3.
- `nnset(m,n)` returns a set with values from m to n: m, m+1,…, n-1, n. So `nnset(4,6)` gives a set consisting of the codes 4, 5 and 6.

Example: You use a general predefined list as your answer alternatives in several questions, but in a particular question you only want to return answer alternatives 8,9,10,11 and 12. Then all you have to do is to put nnset(8,12) in the Code mask property of that question.

15.3.3. .union()

`f('Q1').union(f('Q2'))` returns a new set that is the union of f('Q1') and f('Q2'), that is a set consisting of all codes answered to either Q1 or Q2. If you want to add specific codes to a set in a code mask, then use .union() in combination with set().

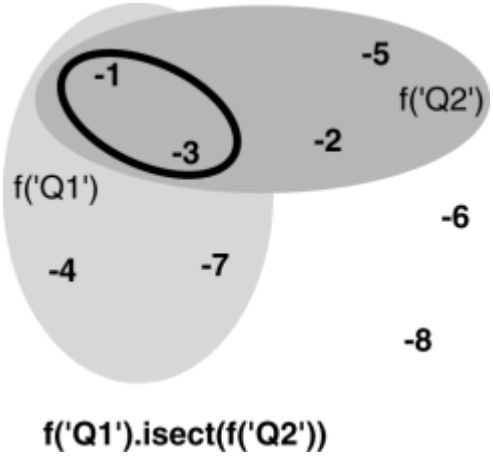


f('Q1').union(f('Q2'))

Example: f('qID').union(set('99'))Here you will always include the answer alternative with code '99'

15.3.4. .isect()

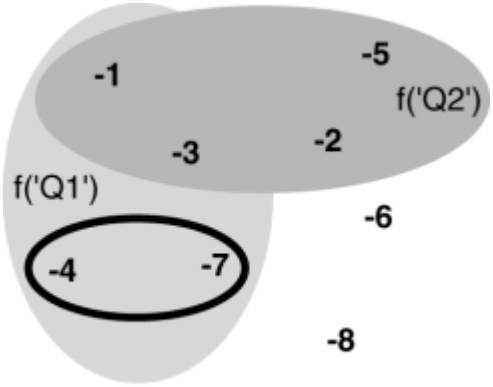
`f('Q1').isect(f('Q2'))` returns a new set that is the intersection of f('Q1') and f('Q2'), that is a set consisting of all codes answered both in Q1 and Q2.



f('Q1').isect(f('Q2'))

15.3.5. .diff()

`f('Q1').diff(f('Q2'))` returns a new set that is the difference between f('Q1') and f('Q2'), that is a set consisting of all codes answered in Q1 and not in Q2. If you want to remove specific codes from a set in a code mask, then use .diff() together with set()



f('Q1').diff(f('Q2'))

Example: f('qID').diff(set('1')) Here '1' is never included.

15.3.6. Codes

Remember that the code mask gives a set of codes that are used to filter the answer list/iterations. Make sure that you use exactly the same codes on the items of the answer lists in the different answer lists, or else the masks will be wrong. Tip: Use Predefined scales/lists (see How to Add New Objects to the Questionnaire Tree on page 217 for more information) as much as possible when using code masks, because then you are sure that the codes are exactly the same in the different questions.

15.4. Column Masks in 3D-grids

Used for filtering columns in a 3D-grid. If you want to dynamically exclude a column (an element in a 3D-grid), use this field to create a Jscript-expression that evaluates to a Boolean value (true or false), in the same way as when you create a condition. If this value is evaluated to 'true' the column is displayed, otherwise if this value is evaluated to 'false' the column is not displayed. If you leave the field empty, the column is always displayed.

If we set up a 3d-grid question called "time" with a numeric list question for each of the TV channels, there will be one column for each channel.

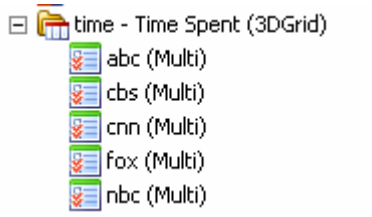


Figure 510 The "time" 3d-grid from the questionnaire tree

We can filter these columns based on the answers to the "TVchannel" question by including conditions such as `f("TVchannel").inc("1")` in the "column mask" for each of them.

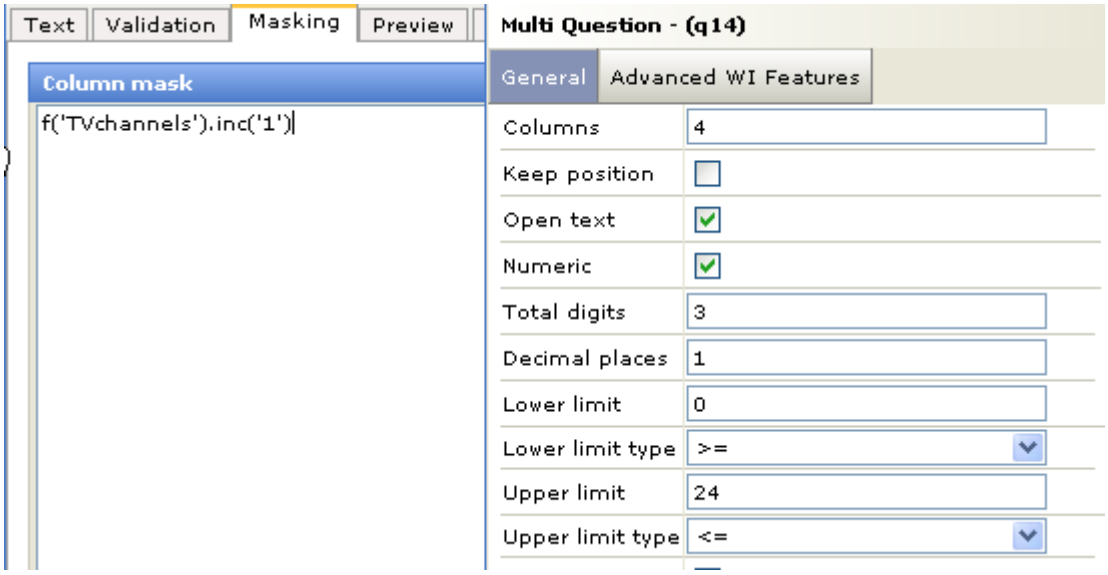


Figure 511 Properties of the "abc" multi question in the 3D-grid

The result will then be that only the channels answered in the "TVchannel" question will be displayed:

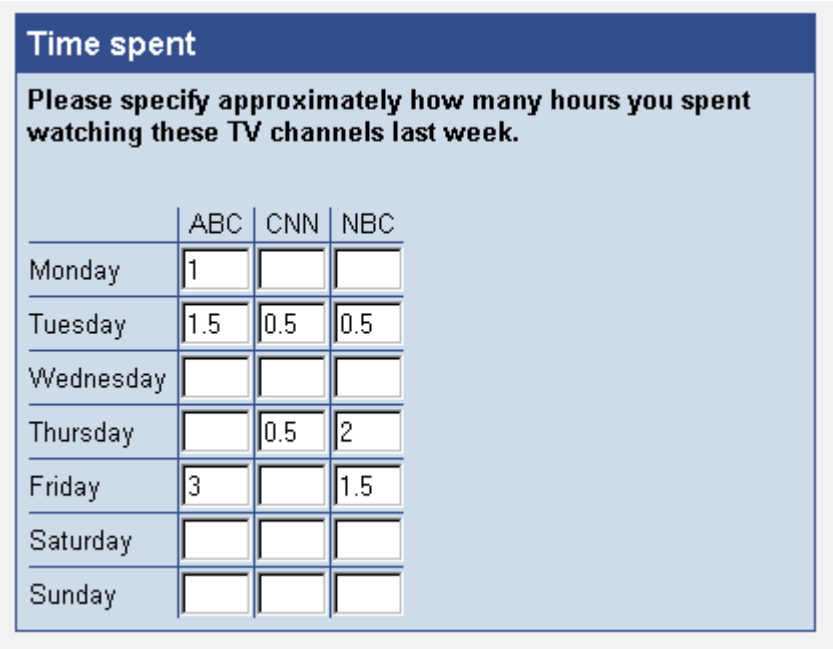


Figure 512 The resulting "Time spent" question

15.5. Question Mask

Used to dynamically exclude and include questions in questionnaires. This functionality can also be used in Page objects (see The Page Object on page 303 for more information). If you want to dynamically exclude a question, use this field to create a Jscript-expression that evaluates to a Boolean value (true or false), as when you create a condition. If this value is evaluated to 'true' the question is displayed, and if this value is evaluated to 'false' the question is not displayed. If you leave the field empty, the question is always displayed.

If we set up a Single question q7- Favorite, and want to include this question only when a respondent has also picked EuroSport (code '2') in the multi question q4 –TV Channels Today, write the following code in the Question mask field of q7- Favorite.

f('q4').inc('2')

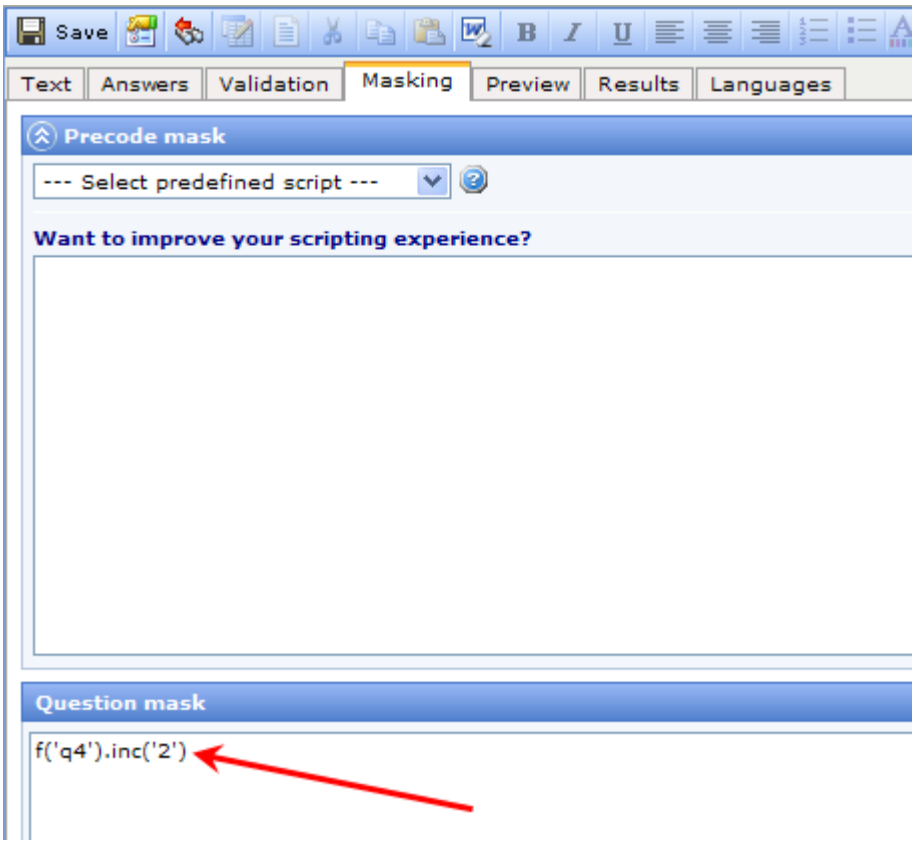


Figure 513 Example of Question masking

The Masking tabs for Single, Multi, Ranking, Grid, Numeric List and Open Text List questions include the Predefined Scripts functionality (see Predefined Scripts on page 285 for more information).

15.6. Text Substitution/Response Piping

You can retrieve text or values from a question and insert it into the question wording of another question. To do this, use the caret character (^) in front of and after a Jscript expression. This can be used in all text fields, for example, Title, Text, Instruction and Answer list/scale. Note however that this cannot be used in script nodes, conditions, code masks or validation code fields.

Example:

In the *TVchannels* question described in the Multi section, the code **`^f("name")^`** is inserted in the text field. This refers to the **name** question from the Open Text section.

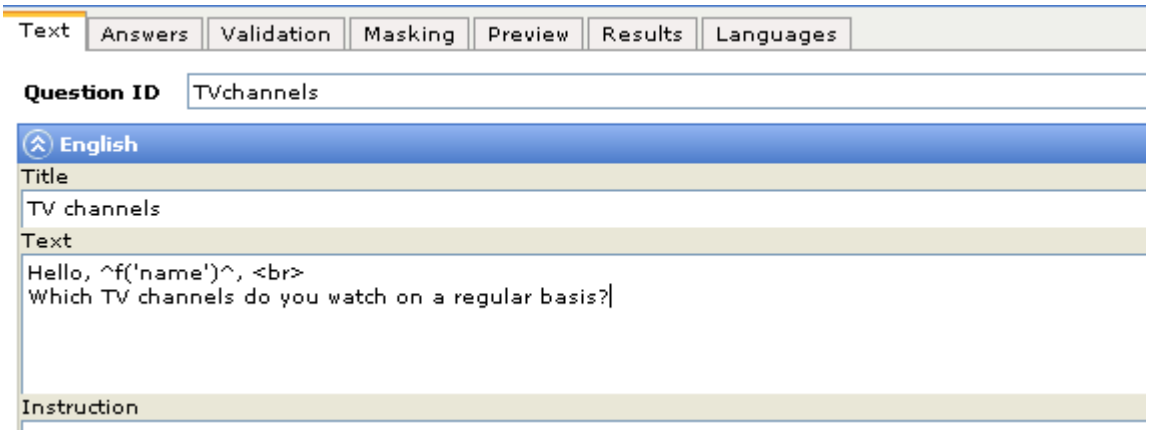


Figure 514 The TVchannels question

The respondent will see the question as shown in the figure below (the name will be different of course).

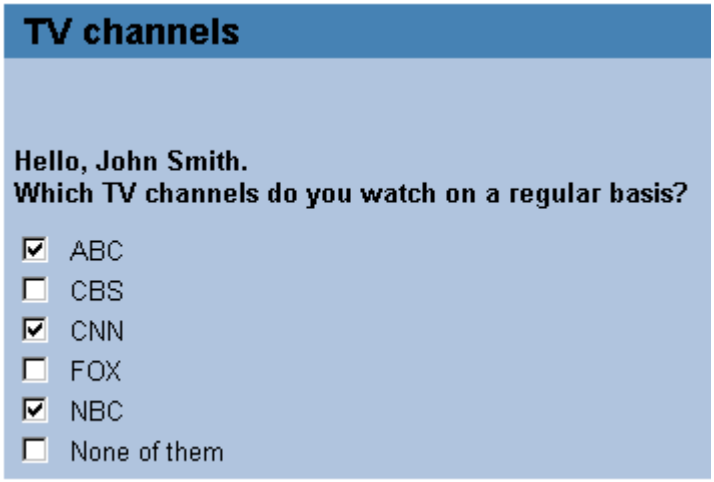


Figure 515 The "TVchannels" question with text substitution

The two tables below show texts returned from **^f("qID")^** and **^f("qID")["code"]^** for different question types:

Question type	**Returned from ^f("qID")^**
Open text	The text answered in the text box.
Single	The text from the answer list corresponding to the code returned from f("qID") in the current language.
Multi, Ranking, Open Text List, and Numeric List	The text(s) from the answer list corresponding to the code(s) returned from f("qID") in the current language. If more than one, the answer will be separated by comma and with "and" (in the current

	language) between the last two items.
Other property of answer lists	The text answered in the text box. (The question ID is qID_code_other (see Question Properties on page 251 for more information))
Loop	The text of the loop member corresponding to the iteration with code qID in the current language.

Question type	**Returned from ^f("qID")["code"]^**
OpenText List, Numeric List or Ranking property	The text answered in the text box.
Grid	The answer from the scale corresponding to the code returned from f("qID")["code"] in the current language.

The same rules apply to loop questions, but there you may also need to specify the iteration(s) (see Loops - f('qID','iteration_code','iteration_code',…..) on page 454 for more information).

15.6.1. Drag-and-Drop Piping

To simplify the use of answer piping in WYSIWYG mode, you can drag-and-drop questions from the Questionnaire tree toolbox into the text elements of other pages in the survey. Drag the required item from the tree and drop it into the text area where piping is required.

Note that this can be done only when in WYSIWYG mode. Click the **Switch Between Modes** button  in the Question Details page toolbar to change modes.

The question types:

- Single
- Multi
- Ranking
- Open text
- Numeric
- Date

can be dragged into the Title, Text, Instruction and Language texts for codes. The action will place, for example, ^f('q2')^ into the text field (in this example the object dragged was q2).

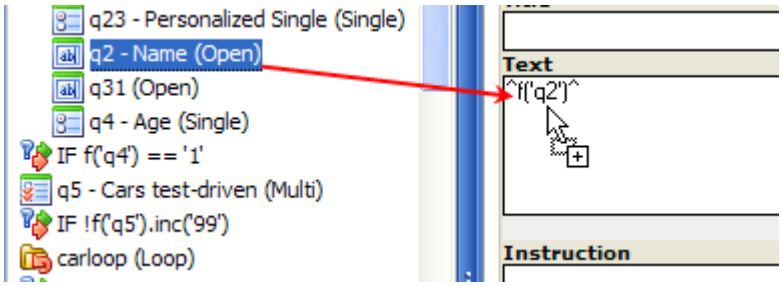


Figure 516 Example of dragging-and-dropping a question for piping

Note: In the event you attempt to drag-and-drop questions while you are in HTML mode, spurious characters or "coding" may result. Ensure that all such is removed from the text fields before you attempt to launch the survey.

The answerlist view of codes is NOT supported.

15.7. Dynamic Questions

This functionality allows you to use logic within a page, and enables parts of a page to be updated based on responses to one or more questions on the same page. This can enable you to, for example, cause additional questions to appear on the page once the respondent has answered the first question. The functionality is based on the Ajax technology, and uses one (or more) questions as a trigger to activate logic in subsequent questions.

Note: Dynamic Questions only functions within page objects, and the trigger question(s) and the question(s) to be triggered, must be on the same page in the survey. Triggers are not available for Chart nodes.

Any logic created using the other functionality within Confirmit, such as text piping, question masking etc. can be controlled by the trigger function.

Note: "Dynamic Questions" is supported in IE8+ (Windows), Firefox 10+, Google Chrome 26+ and Safari 5.1+ (Mac only). This functionality is only available in surveys using Survey Layouts (see Survey Layouts on page 65 for more information). If a Survey Layout is not used, then the page layout will be static and the questions will appear on the same page. However as the logic is only evaluated when the page is submitted (when the respondent clicks the Forward button), an error message may result if for example one of the initially hidden questions is missing a response. There is therefore no fall-back for Dynamic Questions. However the DynamicQuestionsEnabled() function described in the Confirmit Scripting manual can be used to either screen or create an optional routing for respondents who do not have the required browser.

Touch device (iPhone and Android) enabled surveys support dynamic triggers. For touch devices, pages containing dynamic triggers will always appear on the same page irrespective of the "One question per page" touch setting.

15.7.1. Example Using Dynamic Questions

Below is an example demonstrating the use of the Dynamic Questions functionality.

Assume we wish to start a questionnaire by initially showing just one question on a page, asking the respondent to type in his/her name. Then once the respondent has typed in their name, we want a second question to appear on the same page, asking the respondent, by name, to input their gender.

To do this we first need to create a Page object in the questionnaire tree, and then within that page we need to create two questions; the "Name" question and the "Gender" question. For the Gender question, we need to pipe the respondent's name into the question Text, we need to mask the question until the respondent has input their name (the answer is Boolean), and we need to set the trigger such that the Gender question's masking is activated by the Name question. Proceed as follows:

1. Create your survey (or open it if it already exists), and create a page in the appropriate place.
2. In the page, create an **Open** question and a **Single** question.

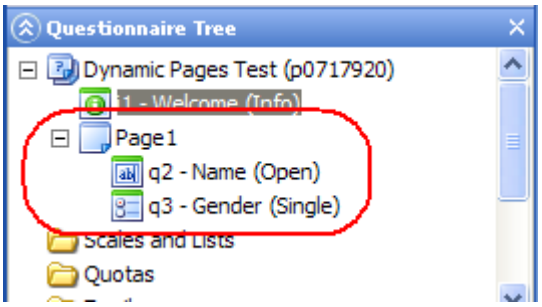


Figure 517 The page containing the two questions

3. Set up the first question on the page (in this case q2) as required to ask the respondent to input his/her name.
4. In the second question on the page (q3) pipe the answer from q2 into the text of q3.

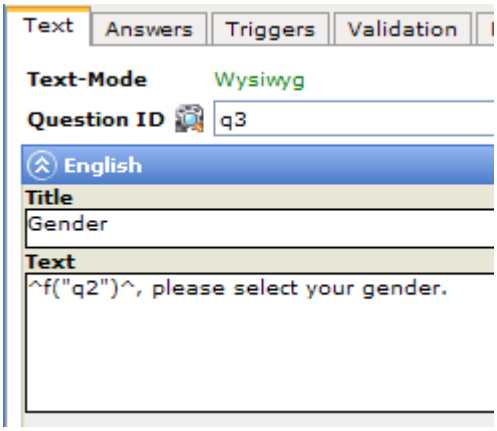


Figure 518 Piping the answer text from q2 into q3

5. Go to the Answers tab and set up the answers as required.
6. Go to the Trigger tab, and type in the Question ID of the question you wish to use as the trigger - in this case **q2**.

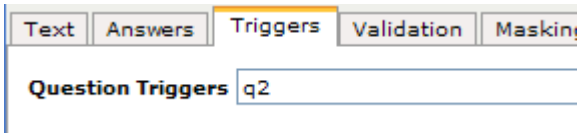


Figure 519 Setting the Trigger

7. Go to the Masking tab, and in the Question Mask field type the masking expression you wish to be run.

   In this case, you want q3 to be displayed once q2 has been answered. The expression required therefore needs to check whether the answer to q2 is Boolean (is not empty), and if the result is TRUE, then to show the question.

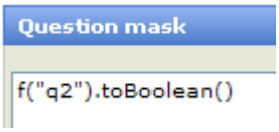


Figure 520 The masking expression

8. Save the changes.
9. Right-click on the survey in the Questionnaire Tree and select **Quick Test > Quick Test (with rebuild)** from the menu. The results should be as shown below.

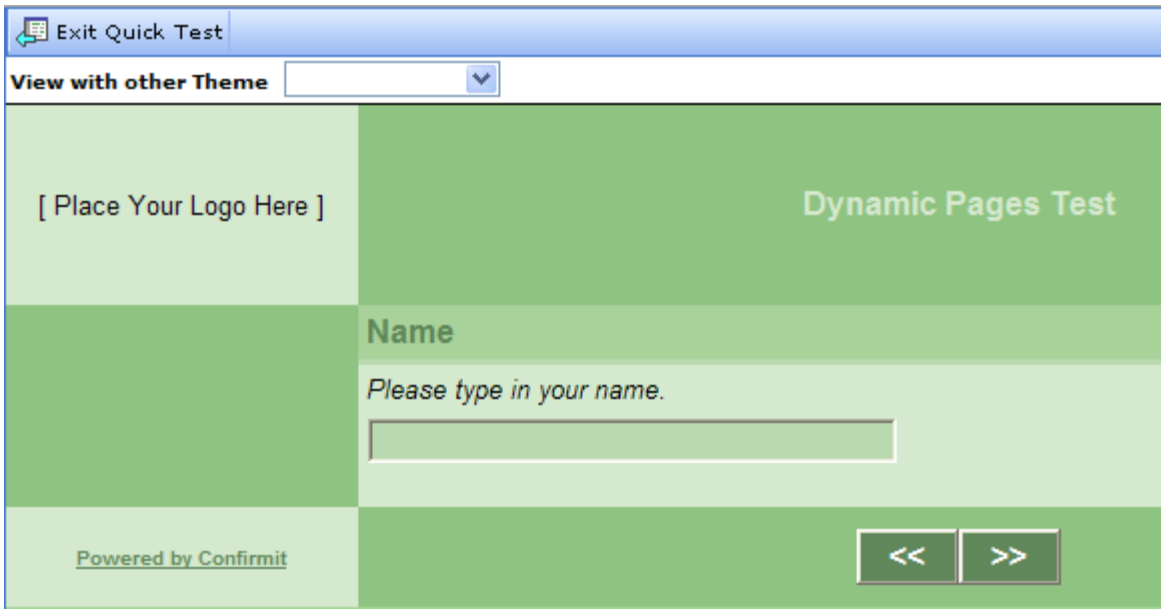


Figure 521 The page before the Name question is answered

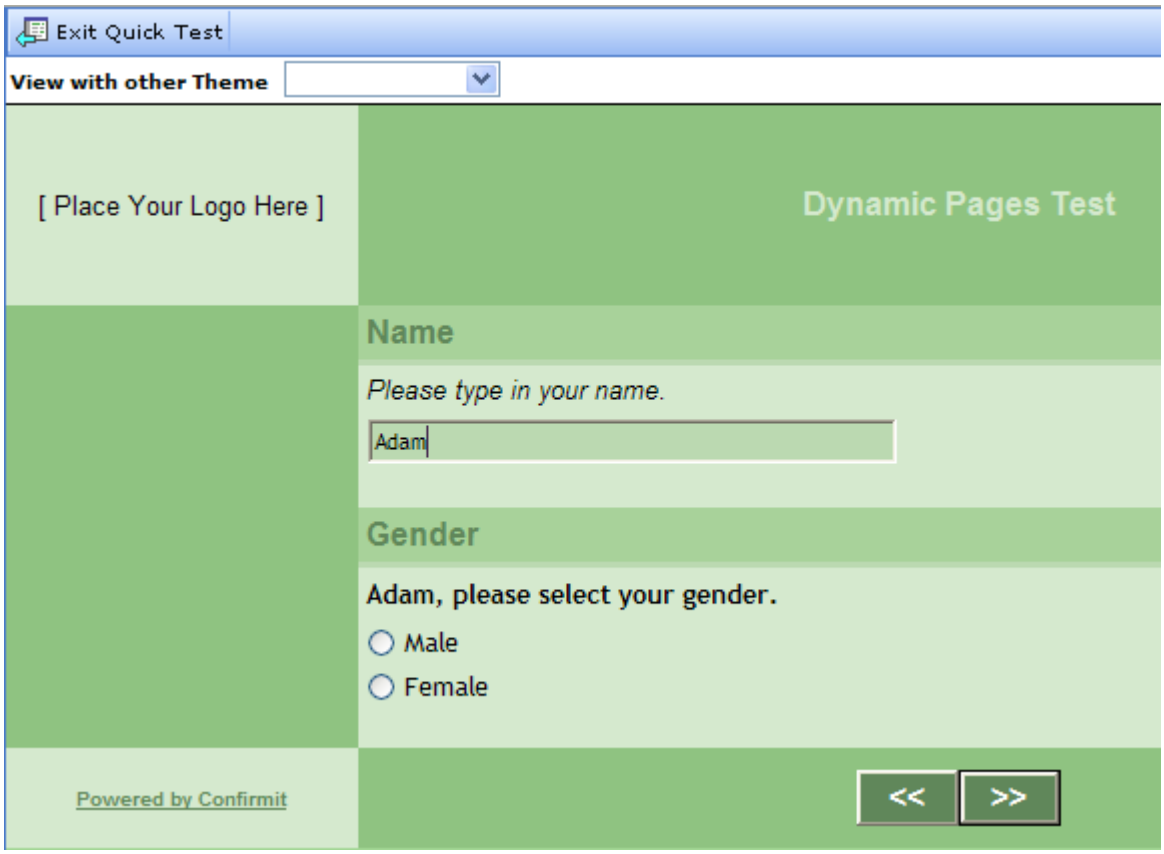


Figure 522 The page after the Name question is answered

When q2 is changed the part of the page that contains q3 will be refreshed, so any changes will be updated immediately.

15.8. Validation Code

When you add a form to a questionnaire you actually add four stages of operations to the interview program:

1. **User interaction:** Display one or more forms to the person entering responses and wait for input.
2. **Check size:** Verify that open-ended answers comply with the field width and that numeric answers comply with settings for total number of digits and number of decimals. If not, raise error flag. Note that for performance reasons, no such checks are added here for coded variables (single and grid questions). The length of the codes is checked when the survey is compiled.
3. **Store:** Store the value of entered responses.
4. **Validate:** Check that answers stored comply with the specified data validation rules. If an error has been raised then repeat from 1.

The following sections describe the default validation rules and describe how you can add your own code to a form in order to perform custom validation operations.

15.8.1. Default Validation Rules

The system provides the following types of built-in error checking:

1. Required answer testing.
2. Exclusivity checks.

3. Other-Specify verification.
4. Rank order testing.
5. Answer size tests for fixed-width fields.
6. Numeric response validation

If you do not like the default handling of 1–4, or prefer to use a less stringent quality scheme for the data you collect, each type of error handling can be turned off individually when generating WI (see Preparing for Data Collection on page 492 for more information). The system always performs size checks and numeric response validation, because failing to do so will cause database errors. A description of each test is provided below:

15.8.1.1. Required Answer Testing

Required answer testing exists in order to ensure that you get complete responses to your surveys.

- At least one alternative must be checked/selected for a coded variable defined in a **single** or **grid** form.
- Textboxes used for input of open responses cannot be left blank.

Note: For multi questions, an answer where no alternatives are checked is considered a valid answer unless it contains "Single punch" alternatives which are subject to the exclusivity testing described next. Required answer testing may be turned off for separate questions by selecting "Not Required" in the question's properties (see Question Properties on page 251 for more information).

15.8.1.2. Exclusivity Testing

Exclusivity testing is used for **multi** questions that have one or more "Single punch" alternatives. A "single punch" element in a **multi** form declares a variable that is exclusive within the group of variables declared in the form. If a "single punch" alternative is answered, none of the other alternatives should be answered. So, for example a "None of the above" alternative cannot be answered in combination with any of the other answers.

The exclusivity test assumes that the alternatives given exhaust all possible answer combinations and at least one positive answer is required.

In consequence, the response will only be considered valid if the respondent checks at least one of the none-exclusive or exactly one of the exclusive options, which means that the question will be required.

15.8.1.3. Other-Specify Validation

Other-Specify validation is used for questions where one or more of the items in the answer list has an "other, specify" text box (i.e. the "other" property is used on one or more of the items in the answer list). Other-Specify validation verifies that:

- The respondent provides a specification to an alternative that has a specify-field if that alternative is checked.
- That the alternative is checked/answered if a specification is provided.

15.8.1.4. Rank Order Testing

The system applies rank order testing for Ranking questions and grid questions with the "Ordered" property set. Answers must then constitute a set of consecutive integers starting at 1.

15.8.2. Adding Your Own Validation Code

One of the form properties is a text box where you may enter arbitrary script code to validate answers. Depending on the complexity of the validation problem, crafting this code may require a more intimate knowledge of JScript .NET than can be presented in this document. See the Confirmit Scripting Manual for further details.

15.9. Script Nodes

Script nodes typically contain code for the following purposes.

- Internal programming purposes
- Defining functions used in code masks, conditions, other script nodes or validation code

- Setting the values to hidden variables

This requires more intimate knowledge of Jscript.NET than can be presented in this document. See the Confirmit Scripting Manual for further information.

15.10. The Syntax Highlighter

The Syntax Highlighter functionality means that while scripting you no longer need to remember the functions, or look up which properties belong to which classes and which parameters the various methods accept. Instead, all these are available at the touch of a button. The highlighter automatically color-codes key words, and provides lists of selectable options under specific conditions while scripting.

The Syntax Highlighter functionality is on by default for a survey, but you can switch it off in the User Settings (see User Settings on page 134 for more information).

The following script editing areas support the highlighter capabilities:

- Script nodes in authoring
- Validation and masking of questions
- Reportal scripting
- Data Processing scripting
- JavaScript editors

To use the highlighter, start typing into the scripting area the function you wish to use, then press the **Ctrl**+**Space** keys on your keyboard. A drop-down list of all the functions corresponding to the text string you have typed, opens. To open a complete list of all the available functions, press **Ctrl**+**Space** without first typing anything into the scripting area.

The figure below shows the Syntax Highlighter in action:

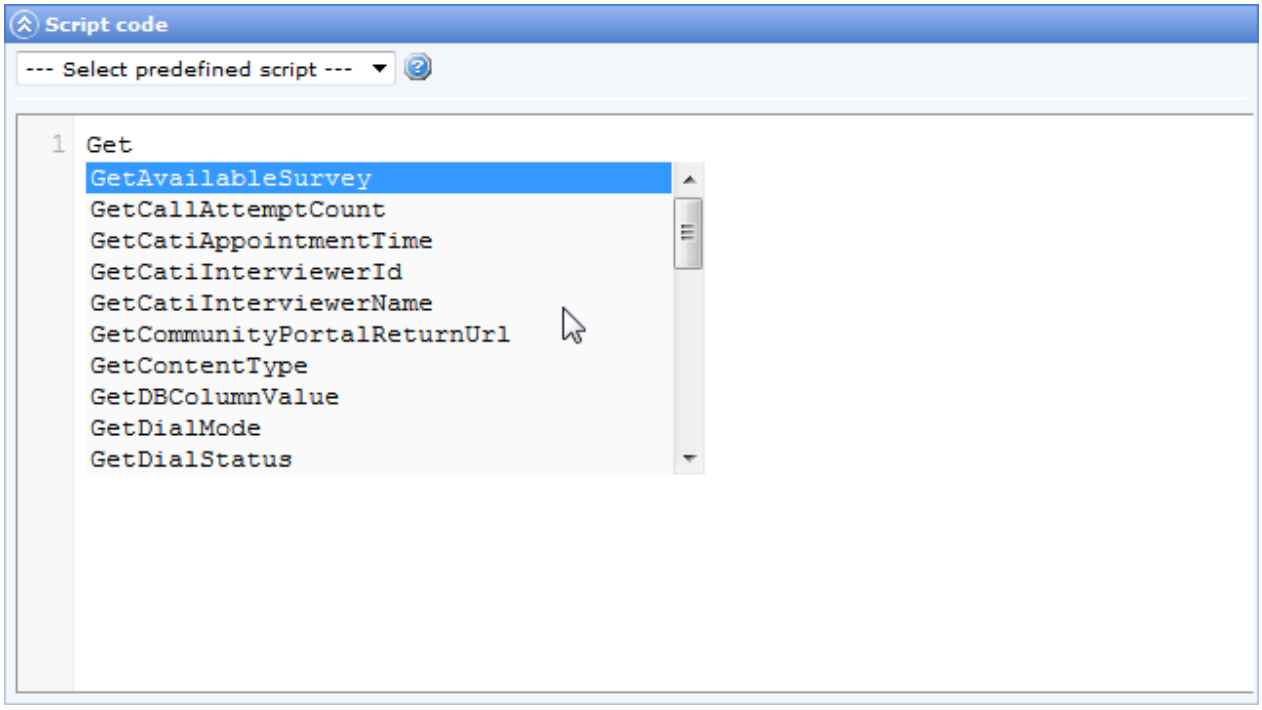


Figure 523 Example of the Syntax Highlighter in action

15.10.1. Using the Syntax Highlighter

When writing code, you can automatically get a list displayed with classes, functions, methods or properties relevant to the context you are in, covering both Confirmit-specific and general JScript.NET constructions. To display the list:

1. Press **CTRL+space** to display the list.

   If you have already started typing, the list will be filtered according to the typed string. After the name of a class or variable, the list will appear automatically when you type period (.).

2. Type more characters to reduce the number of items in the list and jump directly to a member in the list. Use the arrow buttons to move up and down in the list.

3. Press **Enter** to select an item.

On functions and methods, a parameters list will automatically pop up to give you information about the number, names and types of parameters required by a function, template, or attribute. The parameter in bold indicates the next parameter that is required as you type the function. Where there are different versions of the function with different parameter lists, you can select which parameter list you wish to view.

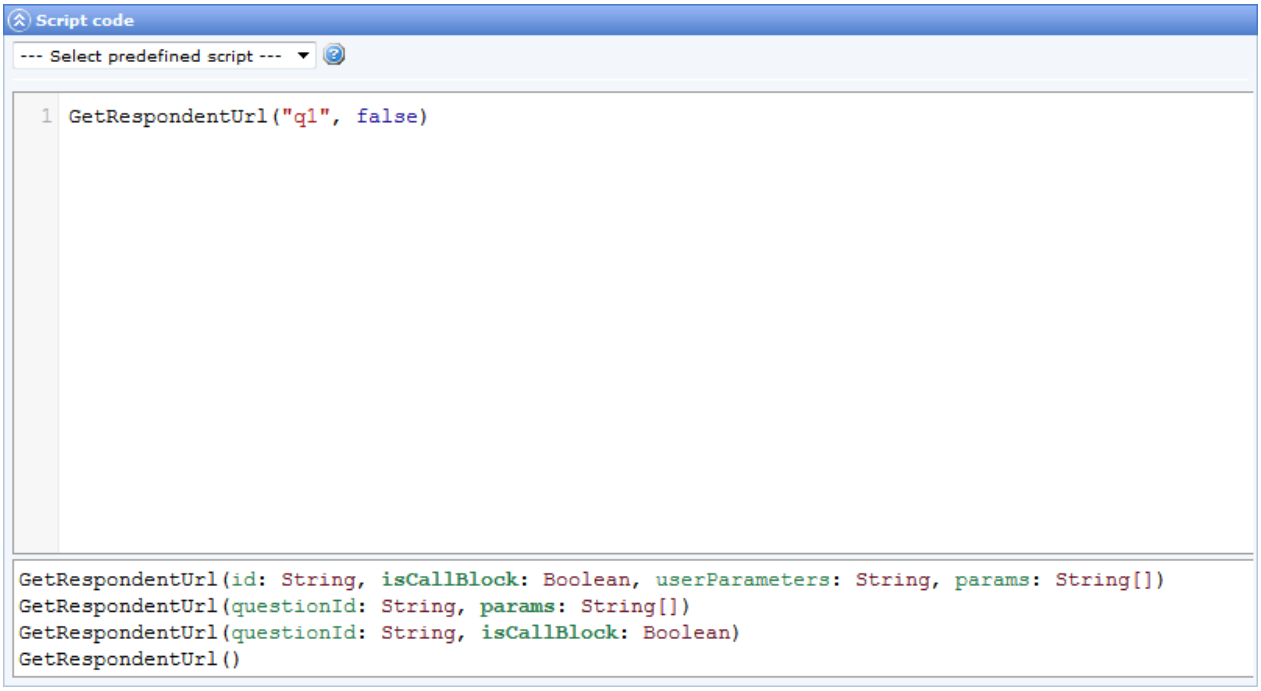


Figure 524 Example of the Syntax Highlighter functionality in use

To view parameter information:

1. After the name of a function or method, type an open parenthesis (as you normally would) to open the Parameters list.

   The declaration for the function will pop up under the insertion point. The first parameter in the list appears in bold. To switch among functions, use the UP or DOWN arrow keys. As you type the function parameters, the bold changes to reflect the next parameter that you need to enter.

2. Press **ESC** at any time to close the list.

Use **Tab** to indent lines of code. Lines of code within curly brackets, { and }, will automatically be indented. To indent several lines of code in one operation, mark all the code you want to indent and press **Tab**. To un-indent, press **Shift+Tab**.

15.10.2. Syntax Highlighter Limitations

The Syntax Highlighter has some limitations. No autocompletions are available for implicitly typed objects (objects returned by functions etc.) so

Typing:

```
 f()
```

will not result in an autocomplete suggestion.

Typing:

```
var d = new Date();
d.
```

will not result in an autocomplete suggestion.

Typing:

```
var myDate: Date;
myDate.
```

will result in an autocomplete suggestion.

16. Quality Control

Once you have created your survey you will need to check it to ensure it looks and functions as required before you make it available to your respondents. This chapter describes the methods of quality assurance that you have available in Confirmit. These are performed directly from Designer, or accessed via the items in the **Quality Control** menu or via links in the Launch Survey and Survey Settings pages.

16.1. Quick Test

You can test your survey without having to generate a database. This allows you to perform manual tests in test mode while avoiding time-consuming database and WI generations. You can perform a test for the entire survey by starting from the survey folder, or you can start from any particular question or node.

1. In the questionnaire tree, right-click on the survey folder or on the question/node from which you want to start the test.
2. From the menu, select **Quick Test**, then select the type of test you wish to perform.

   The interview opens in the pane on the right, as in the example shown below.

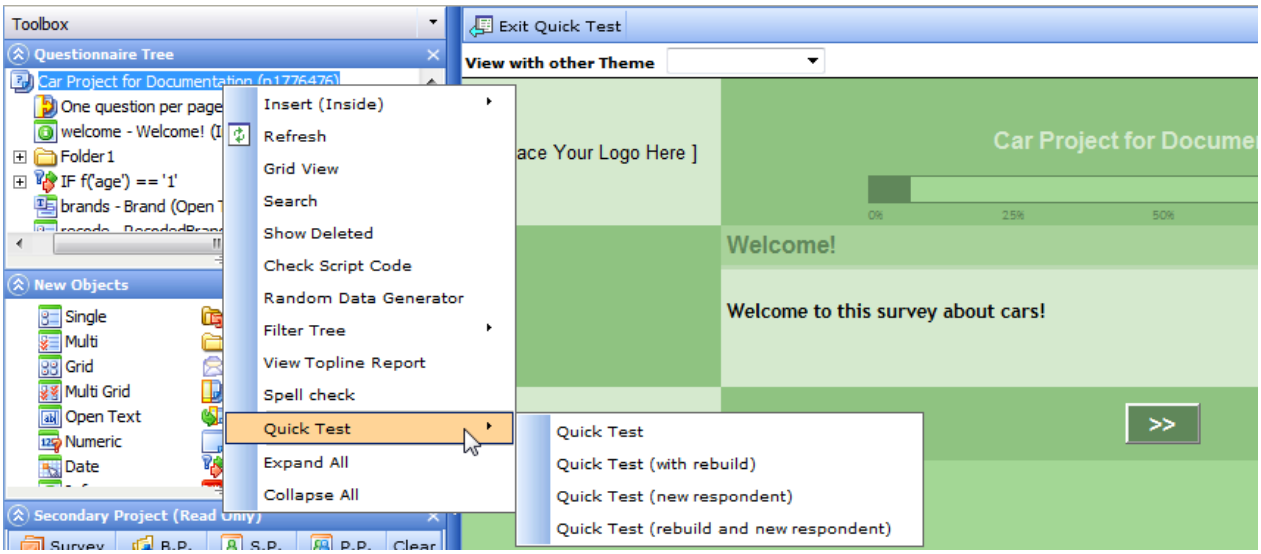


Figure 525 Example of the quick test

You can then test the interview, moving backwards and forwards depending on your Survey settings, in the same way as with a live survey. You can also double-click questions in the tree to skip directly to them. When you have finished testing the survey, click **Exit Quick Test** to close the test page and return to the Designer.

Your responses will be stored in the current session. This means that if you re-enter the Quick Test function during the same authoring session, your previous responses will still be there.

- If you make changes in the questionnaire, select **Quick Test (with rebuild)** to apply the changes and test further with the same responses.
- If you want to remove all responses and test the survey as a new respondent, select **Quick Test (new respondent)**.
- If you make changes to the survey and wish to test the survey as a new respondent, select **Quick Test (rebuild and new respondent)**.

Note: Hidden questions (see The General Tab on page 251 for more information) are shown in Preview and Quick Test, with the text "HIDDEN DATA" alongside to identify them, so you as the author can ensure they function correctly.

Note: Quick test also automatically runs "Check Script Code" before opening the interview, so you will receive immediate notification in the event of syntax errors.

16.2. Check Script Code

The Check Script Code functionality will check your survey looking for syntax errors in your coding. Confirmit will check conditions, question and column masks, code masks, validation code, script nodes, and response piping. You DO NOT have to compile or generate to use this feature.

Note: The script code must be written in JScript.NET (.NET survey engine) to use the script checker. This code check is for syntax errors only, so there could still be other types of errors in your survey, for example, trying to set a value in a question with too many characters according to field width, etc. Such errors can be found through run-time testing of the survey (i.e. going through survey in Test mode). You can also use the Random Data Generator to find run-time errors (see The Random Data Generator on page 477 for more information).

To access the script code check functionality, go to the **Designer > Quality Control > Check Script Code** menu command, or right-click the survey folder in the Questionnaire tree toolbox and choose **Check Script Code** from the menu.

Confirmit will start running through the questionnaire and checking the code. A new pane opens in the lower-right part of the window, displaying the message “Please wait, loading list…”. Once the checking process is finished, any errors discovered will be displayed in the pane.

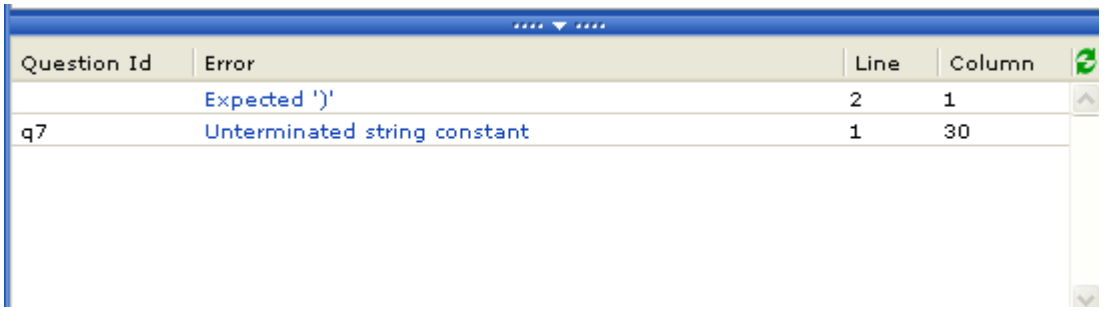


Figure 526 Example of an error list

The Question ID column displays the question ID or the script ID where the error is located. The Error column provides a short summary of the error type.

Click the error link to open the erroneous question, script, condition, etc., in the frame above the error pane. The erroneous question, script, condition, etc., will be highlighted in the questionnaire.

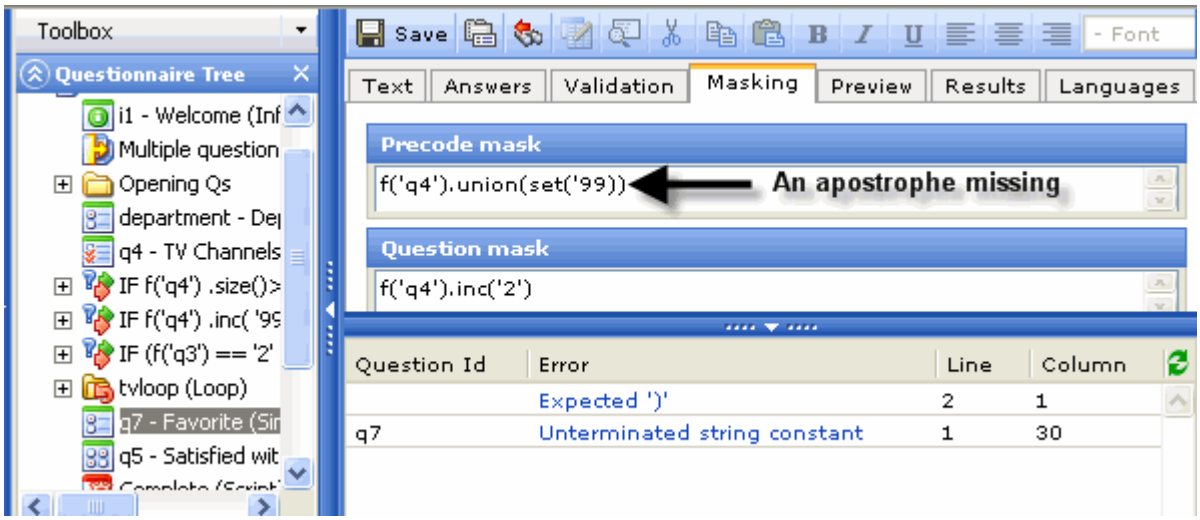


Figure 527 Example of an opened error

You can then locate the error, correct it, click **Save**, and open the next error in the script code error list. When you have corrected all errors in the list, you can run the Check Script Code one more time. The check will also control if the questionnaire has any questions with empty answers or illegal properties. The following checks will be run **before** the code check:

Single questions:

- must include answers in the answer-list when not in a 3D Grid
- the property Drop-down cannot be set when in a 3D Grid

Multi questions:

- must include answers in the answer-list when not in a 3D Grid

Grid questions:

- must include answers in the answer-list when not in a 3D Grid
- must include scale

3D grid questions:

- must include answers in the answer-list
- must include questions

The empty answer and property errors will be displayed one by one in the error list. This means that, if you have two multi questions with no items in the answer list in the questionnaire, and one code mask error, the following will happen: The first time you check the code, the system will inform you that answers are missing in one of the multi questions (the first one in the questionnaire). You will have to insert the answers and check the code again. This time the system will detect that answers are missing in the other multi question. You will have to correct the error and check the code again. This time the system will find the code mask error. You will then have to correct the error and check the code again.

Note: The same check will be run during the WI generation, under Survey Launch.

16.3. The Test Interview Mode

When you launch a survey in the Test mode, on successful completion of the launch you will be presented with a summary of the task along with a line informing you which language the survey was deployed in. The language indicator is a link, and if you click on this link you will be taken to the Test Interview page. This page includes the Questionnaire Tree.

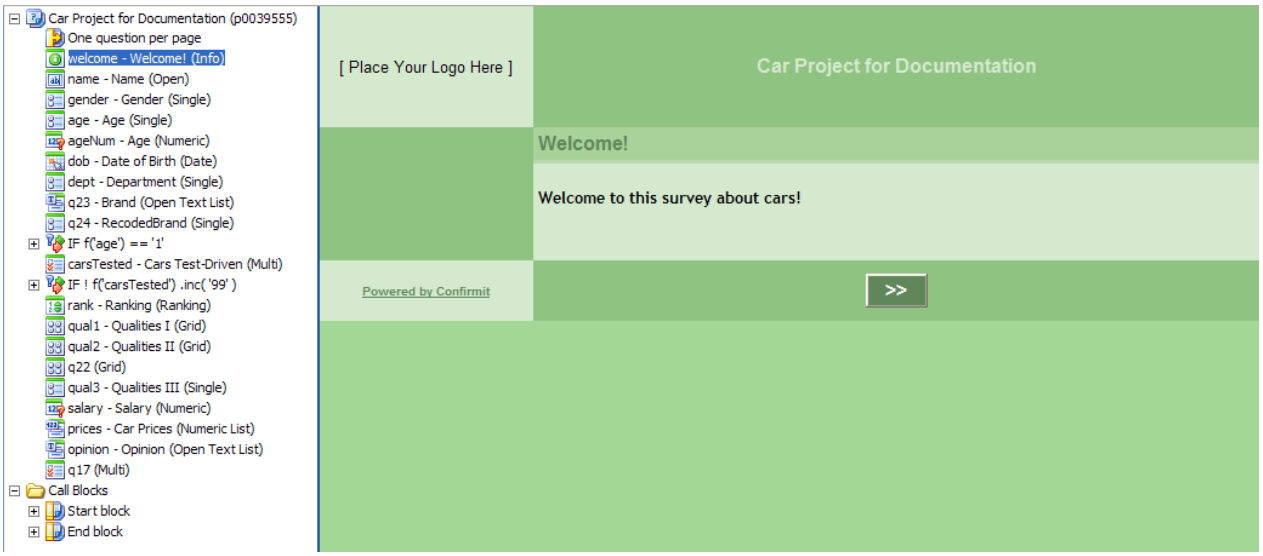


Figure 528 Example of the Test Interview page for a survey

Right-click on the survey name in the Questionnaire Tree to open a drop-down menu with a number of options.

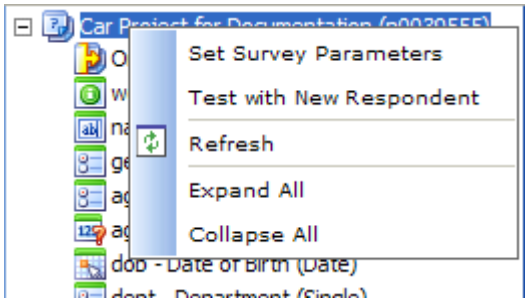


Figure 529 The Test Interview mode right-click menu

The menu items are as follows:

- **Set Survey Parameters -** opens a page in which you can set up any parameters you may require for your survey URL (see Setting Portal, Theme and Language Via Parameters in the URL on page 631 for more information).

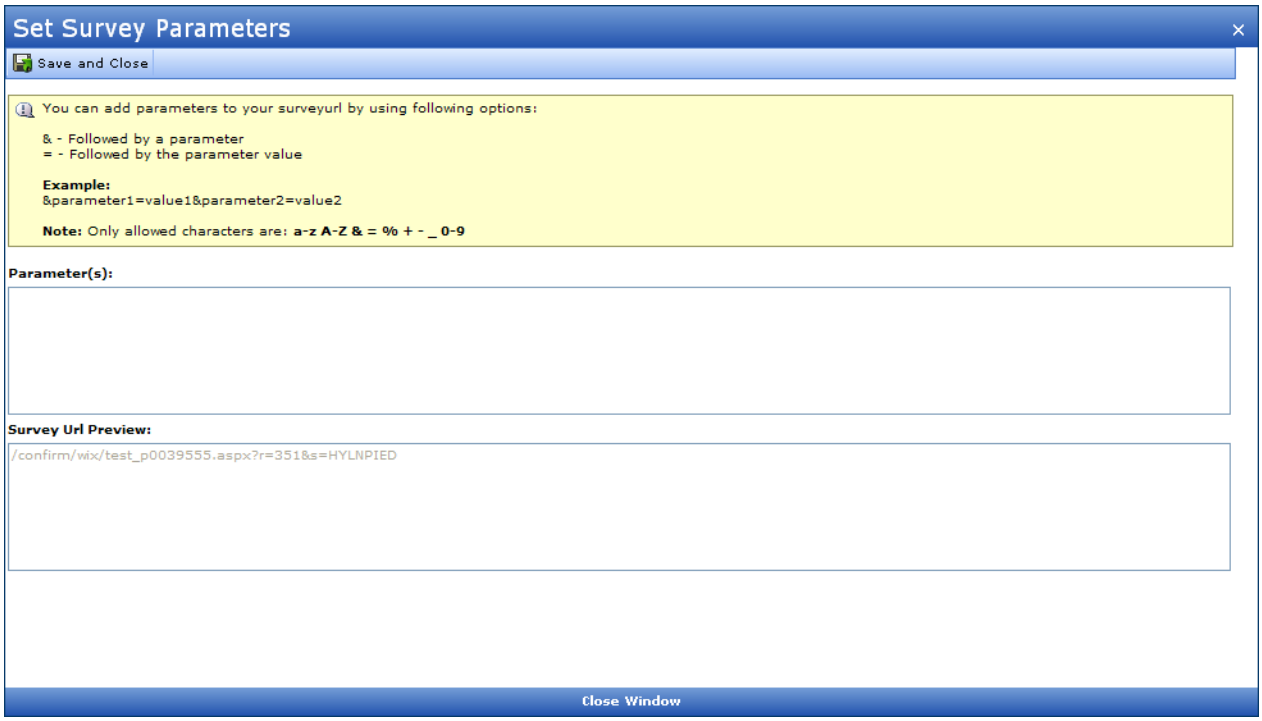


Figure 530 The Set Survey Parameters page

When setting the Survey Parameters you will be presented with a brief explanation of how to use the functionality.

- **Test with New Respondent -** any responses that you provide to the survey during testing will be remembered during the current Confirmit session. Select this item to restart the interview (in the test mode) for a new respondent. I.e. any previously entered answers are cleared.
- **Refresh** - refreshes the screen.
- **Expand/Collapse All -** expands or collapses the Questionnaire Tree.

Note that while the database is in the Test mode the language test link is also available in the upper-left corner of the **Survey Settings > Web Options** tab. This allows you to reenter the Test Interview mode at any time.

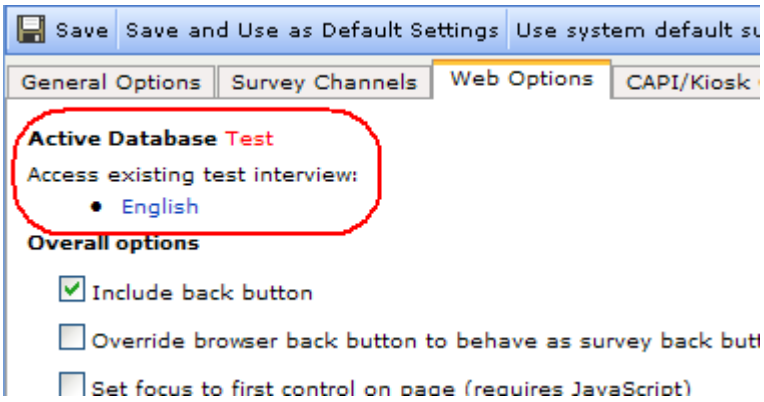


Figure 531 The language link in the Survey Settings > Web Options tab

16.4. The Random Data Generator

Note: The full version of the Random Data Generator is a chargeable Add-On. A limited version, where the user can generate up to 50 random responses, is available for general use without the add-on.

The Random Data Generator (RDG) enables you to test a survey by automatically generating a number of test interviews. The RDG runs through the survey, selecting random responses for the questions. It runs all script code and follows any skip logic (conditions) and answer-list filtering (code masks) that may be included in the questionnaire, so you are able to simulate real interviews. Note that the RDG will not execute SendMail scripts and send emails. The "data" provided for Open Text and Numeric questions will be random strings of alpha-numeric characters appropriate to the question type.

Note: Confirmit must be running in Test mode, the Test database must be generated and the survey status must not be set to Closed (see The Survey Status Tab on page 181 for more information), before the RDG can create the responses. If Confirmit is running in Production mode then it will switch automatically to Test and a message will be displayed when the Random Data Generator is selected. If the database has not yet been generated, then it will be generated automatically as part of the procedure. If the survey status is Closed, then no test respondent data will be generated and no warning will be given.

The RDG allows you to:

- Find runtime errors in script code. Runtime errors will be generated for example if you have a script that tries to set a question with the numeric property to something other than a number, or that refers to invalid question ids when using the f function. Syntax errors in the script will be found when you create the interview files (see Preparing for Data Collection on page 492 for more information) or through the "Check Script Code" functionality (see Check Script Code on page 473 for more information).
- Identify logical errors in the questionnaire – for example groups of respondents who are presented with the wrong questions, questions that are never asked because of a condition error, answers that are never displayed because of errors in a code mask etc.
- Ensure validation code works as intended. Note that custom validation code will execute and log any errors, but for the RDG it will not stop the interview and redisplay the page; it will merely record the response and continue.
- Create a set of test data that resembles the data which you would expect as a result of respondents replying to a real survey. This test data can be useful when you are creating a report for a survey before "real" data has been collected, as it will allow you to view the "finished" report.

16.4.1. How to Generate Random Data

Note: The Random Data Generator (RDG) is only available for the Test database. If the Production database is active, then you must change to Test in the Database switch at the bottom of the page before the RDG will run.

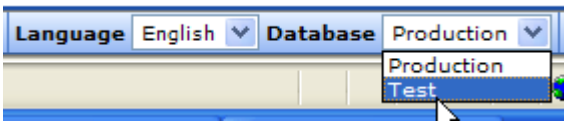


Figure 532 Select the Test database

1. Go to the **Designer > Quality Control > Random Data Generator** menu command.

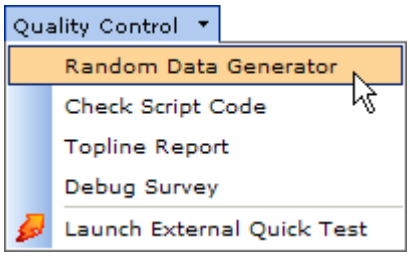


Figure 533 Starting the Random Data Generator

The Random Data Generator page opens.

2. Select the number of responses you wish to create.

   Note that there is a configurable limit per server installation for the number of sets of random data that can be generated in one batch job.

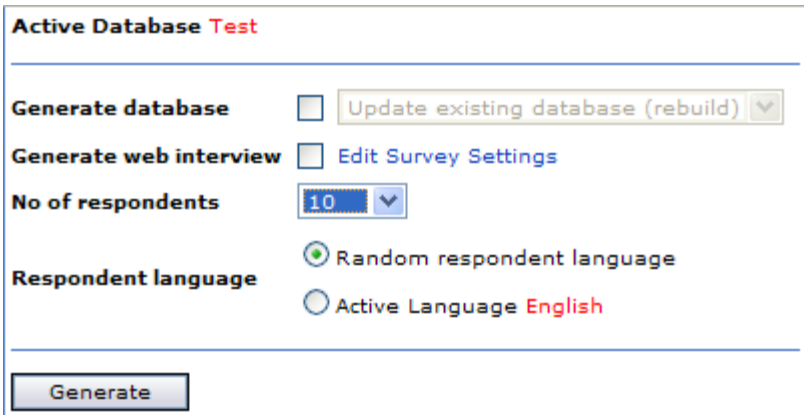


Figure 534 Selecting the desired number of responses

   Note that the Test database must be generated before the RDG can create the responses. If the database has not yet been generated, then it will be generated automatically as part of the procedure. If you have made changes to the survey since your last generation of the test database and interview files, or if these have not yet been generated, you can select to do this.

   If the survey has more than one language, then you can select to generate the responses either all for the default language or for a language selected randomly for each response from the list of those available.

3. Click **Generate**.

   A task progress page opens and the data is created. On completion, any errors that may have been found will be listed at the bottom of the page. Assuming the responses are created, you can now create or update the BitStream files and proceed with creating your report.

16.4.2. Runtime Script Errors

Any runtime script errors discovered will be listed in a pane at the bottom of the screen. Runtime script errors are those errors that would cause a live interview to abort with an error such as that shown below.

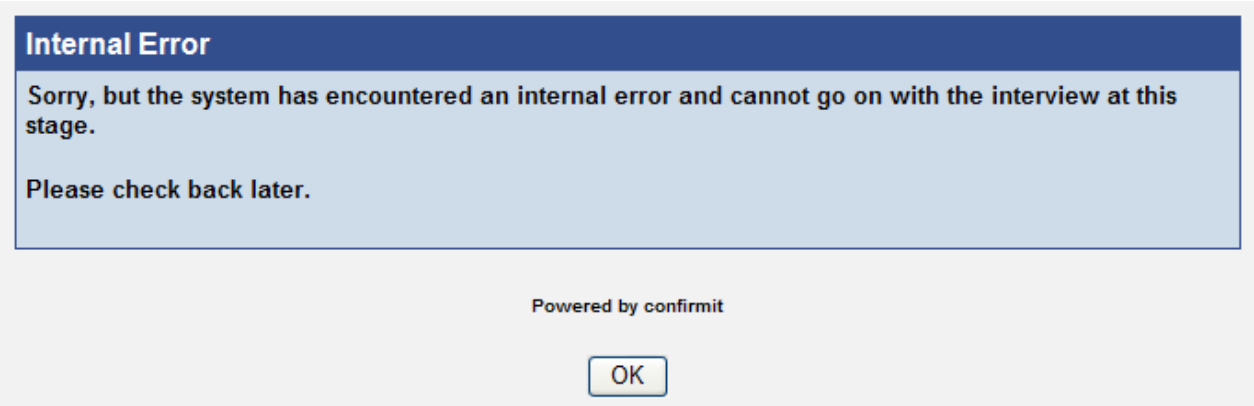


Figure 535 Example of an internal error

If a email address is set up in "Email address to receive emails triggered by scripting errors in interview" in "Survey settings", errors such as this in production would also trigger an email with the error message to be sent.

Click on the error Description to open the question, condition or script node containing the error. If the error description is too long to be displayed in its entirety, place the mouse pointer onto the description to display the full description as a tooltip . Below is an example of such an error:

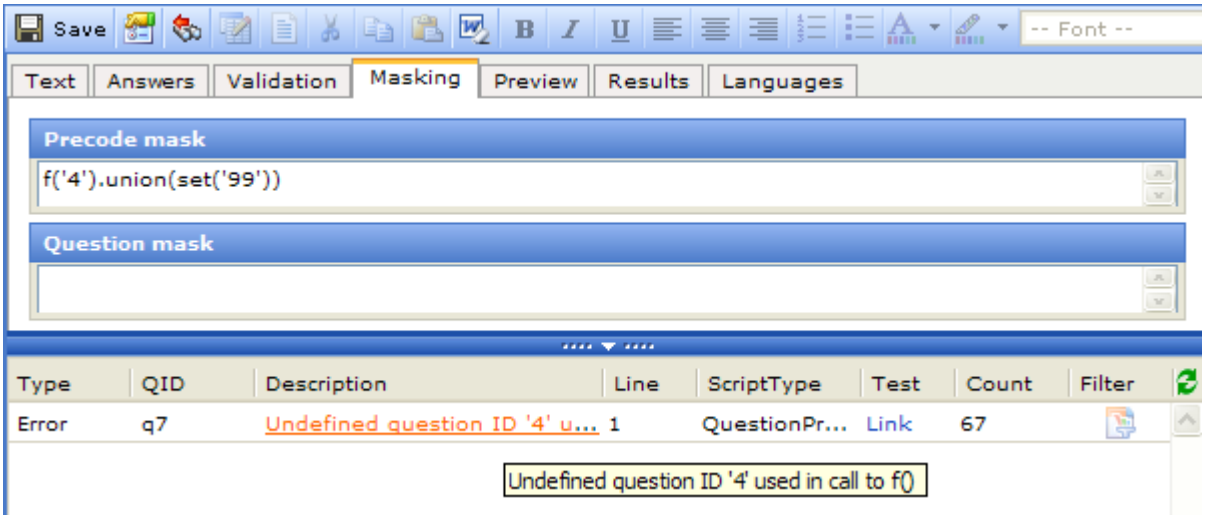


Figure 536 Example of a list of errors

In this example, a **q** is missing in the question id in the code mask. The correct expression should be **f('q4').union(set('99'))**.

- **QID** - is the question id of the question with the error (or script name if the error is in a script).
- **Line** - tells you on which line in that script the error occurred.
- **ScriptType** - is the type of script it is (code mask, validation code etc.).
- **Count** - is the number of respondents this error occurred for during the Random Data Generation run.

Click on **Link** to enter the survey for the first generated respondent who received the error, to see the responses.

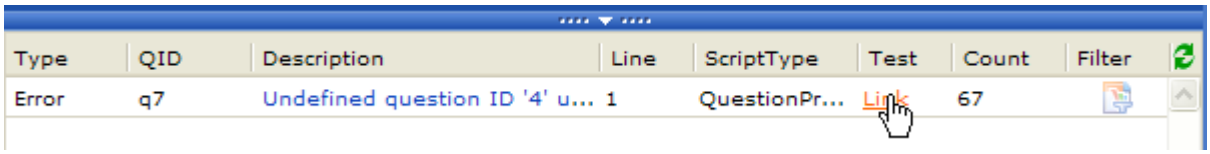


Figure 537 Example of the Link page

If you click on the filter icon towards the right end of the row, the results in Top Line Reporting or the Results tab on questions in designer will be filtered so that you only see the results of those who received the particular error.

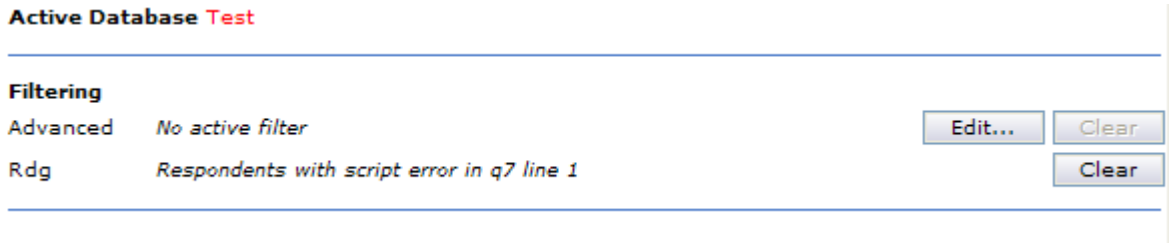


Figure 538 Example of the Filter page

Once you have made the appropriate corrections, you can select **Launch survey** in test mode, update the existing database and generate the interview files again. You can then click on the link in the list to test one of the interviews that failed in order to verify that your correction has solved the problem.

16.4.3. User-defined Validation

The random data will be created according to the properties you have set on your questions. For example it will follow the settings for number of decimals, total number of digits, maximum and minimum values, ranking, required/not required etc. This means that there will never be any errors due to standard validation. However the Random Data Generator will not be able to create data according to user-defined validation defined in the validation code field on questions. That validation code will be executed, but the interview will not stop when a validation error like that occurs; it will simply record the error and proceed. You will later be able to verify the error by entering the link of the first respondent experiencing the error, investigating the test results with Rapid Results (see Rapid Results on page 706 for more information) or looking at the test results in Survey Data Editor (see Edit Survey Data on page 785 for more information).

The figure below shows an example of a user-defined validation that checks that the number of answers to a multi question does not exceed 3:

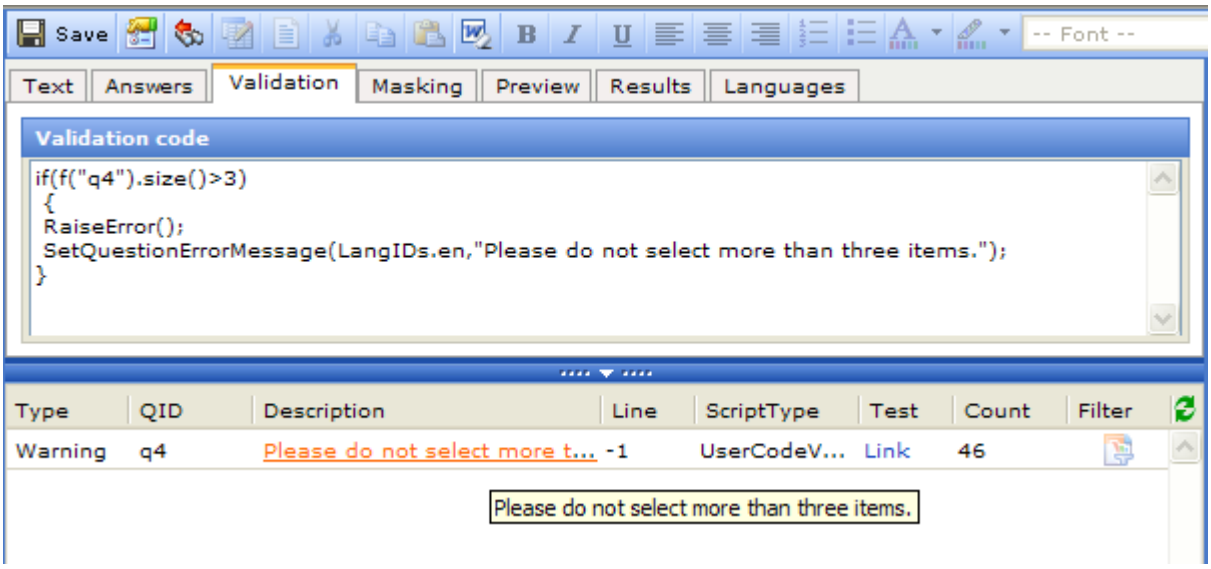


Figure 539 Warnings from User-Defined Validation

16.4.4. Proportions

If you have a questionnaire with one or more screening questions at the beginning, the Random Data Generator may end up generating a lot of respondents that get screened, so that only a few go through the actual questionnaire. To prevent this from happening, you can specify the probability that different responses in the answer-list should be selected as a percentage.

In the example below, all respondents who state that they are under the age of 18 *q4* are screened.

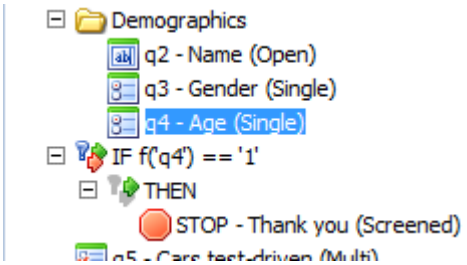


Figure 540 Questionnaire with Screening

To minimize the number of "Under-age" responses, you can specify a low percentage in the RDG% column of the answer list, as shown below:

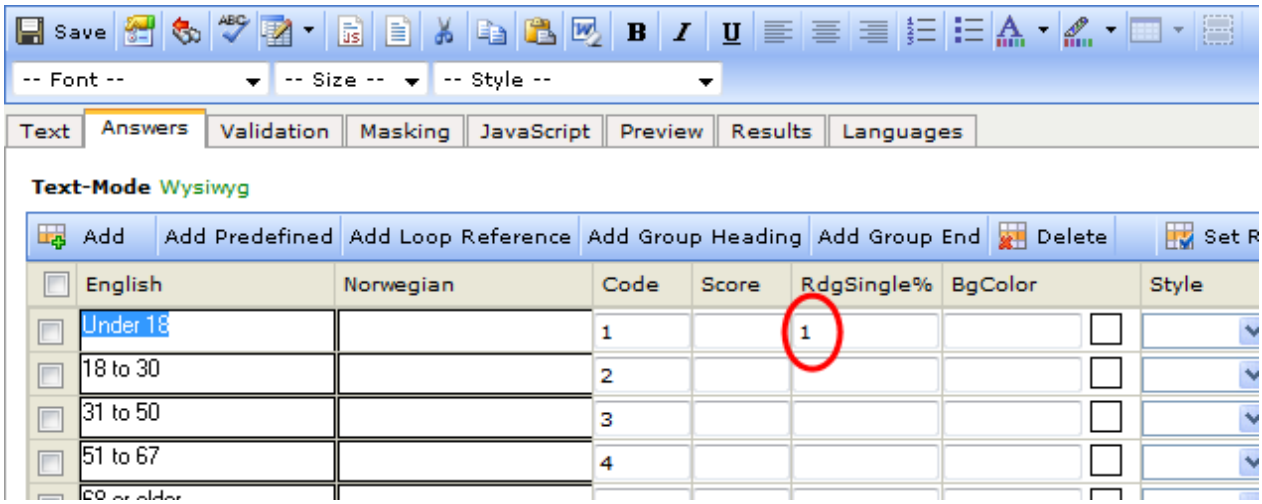


Figure 541 Setting the RdgSingle% to prevent excessive screening

Similarly, there may be certain answers you want over-represented, for example to ensure enough respondents go through a branch of a condition. In this case you can set a high RDG % value on these answers.

The RDG % numbers must be integers from 0 to 100. You are not required to specify numbers for all items in the answer list. Items without a setting will be given a value calculated from the remaining percentage, evenly distributed.

As multi questions can have several responses, there is a difference between the percentage settings for multi and single questions. For a single question the percentages will normally total 100%, but for a multi they can total to more than 100%. For this reason there are different RDG% settings for multi and single questions, and in a reusable answer list both of these columns are available.

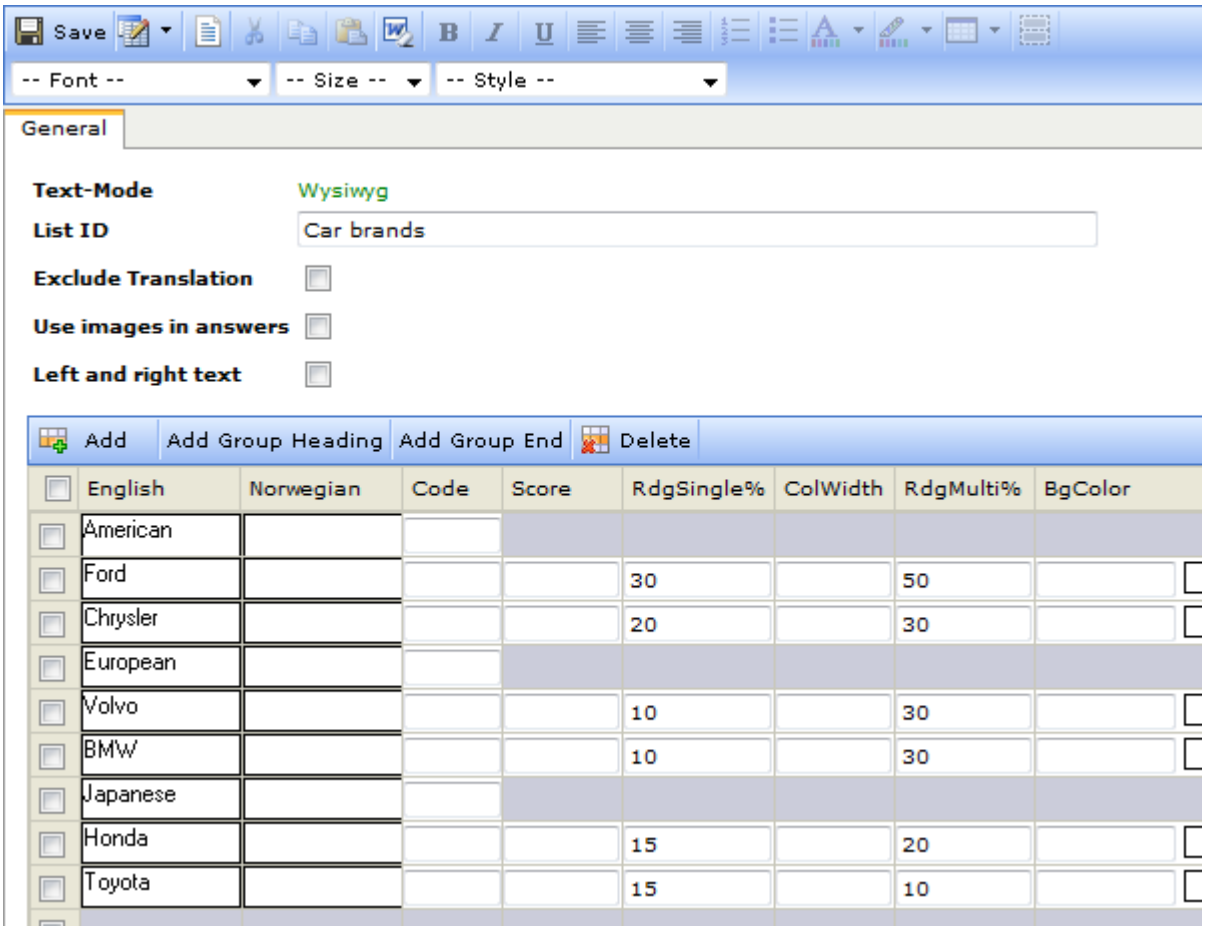


Figure 542 RdgSingle% and RdgMulti% in a reusable answer list

Answer lists may be used in several questions combined with other answers or lists, and these may be dynamically filtered when running the interviews. Therefore the sum of the percentages even for single questions does not have to be 100%. When the RDG is running, the probability of selecting an answer will be calculated based on the relative portion an answer's percentage represents compared to the sum of the percentages of the answers actually displayed.

The responses will be picked so that when you view the results the percentages will match as closely as possible the percentages you have set up.

16.4.5. Excluding Code or Questions from the RDG run

There may be certain lines of code or certain questions you wish to exclude when running the Random Data Generator. Use the function **IsInRdgMode()** to exclude code or questions. IsInRdgMode returns true when the RDG is running and false otherwise.

16.5. Topline Report

Topline Report offers a quick and easy way to (1) look at the production data in real time, and (2) investigate data generated by the Random Data Generator before going live (see The Random Data Generator on page 477 for more information). To access Topline Report do one of the following:

- Go to the **Designer > Quality Control > Topline Report** menu command.
- Right-click the questionnaire folder (or any other folder) and choose **View Topline Report** from the menu.
- Click the **Results** tab in the details page of a question.

The Topline Report page opens.

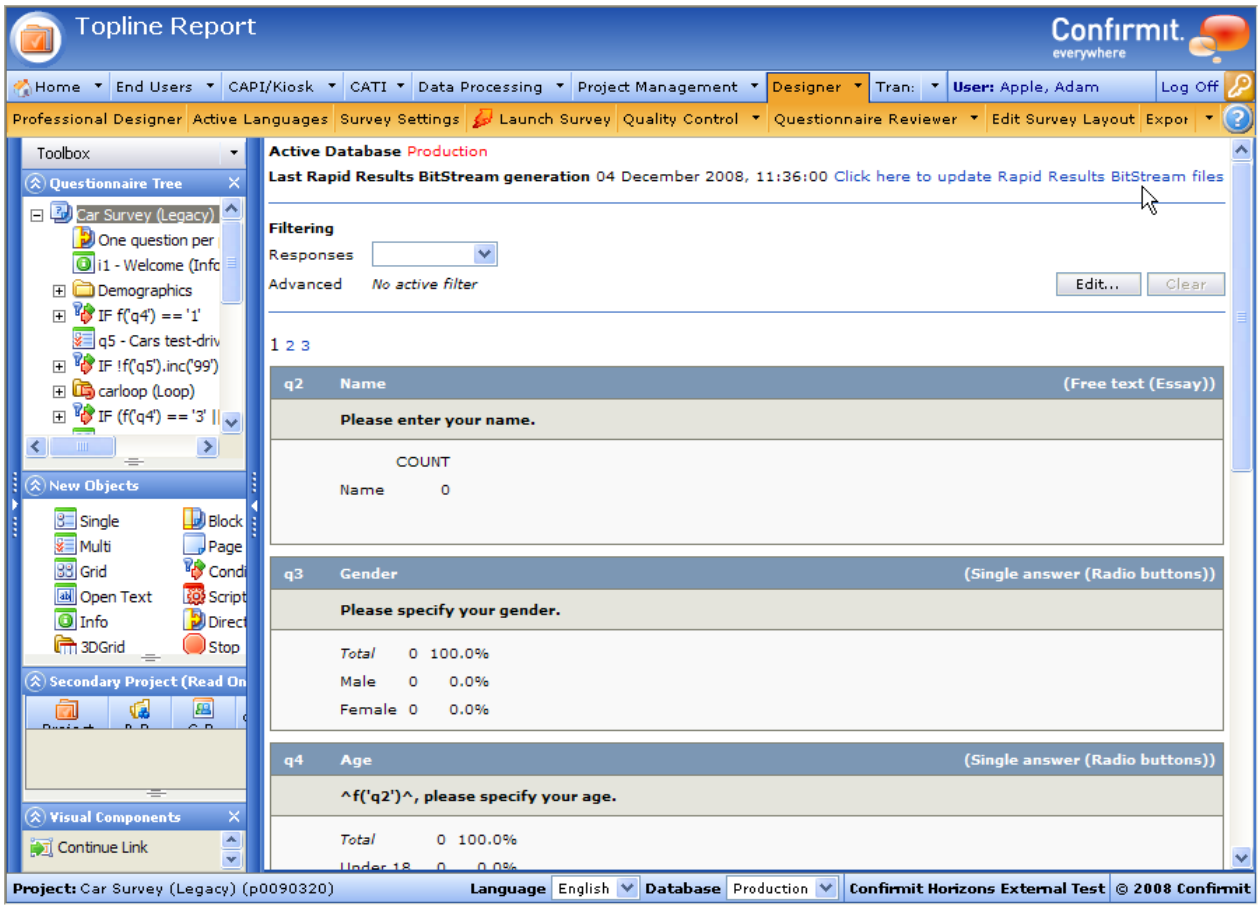


Figure 543 Example of a Topline report

When opened, the report will by default display all responses. You can filter the Topline reports on the response status (Complete, Incomplete, Quota full, Error, Screened). You can also filter data on specific questions(see The Advanced Filter Designer on page 742 for more information).

The figure below shows a report that has been filtered on the Age question. The filter expression will be displayed next to Filtering.

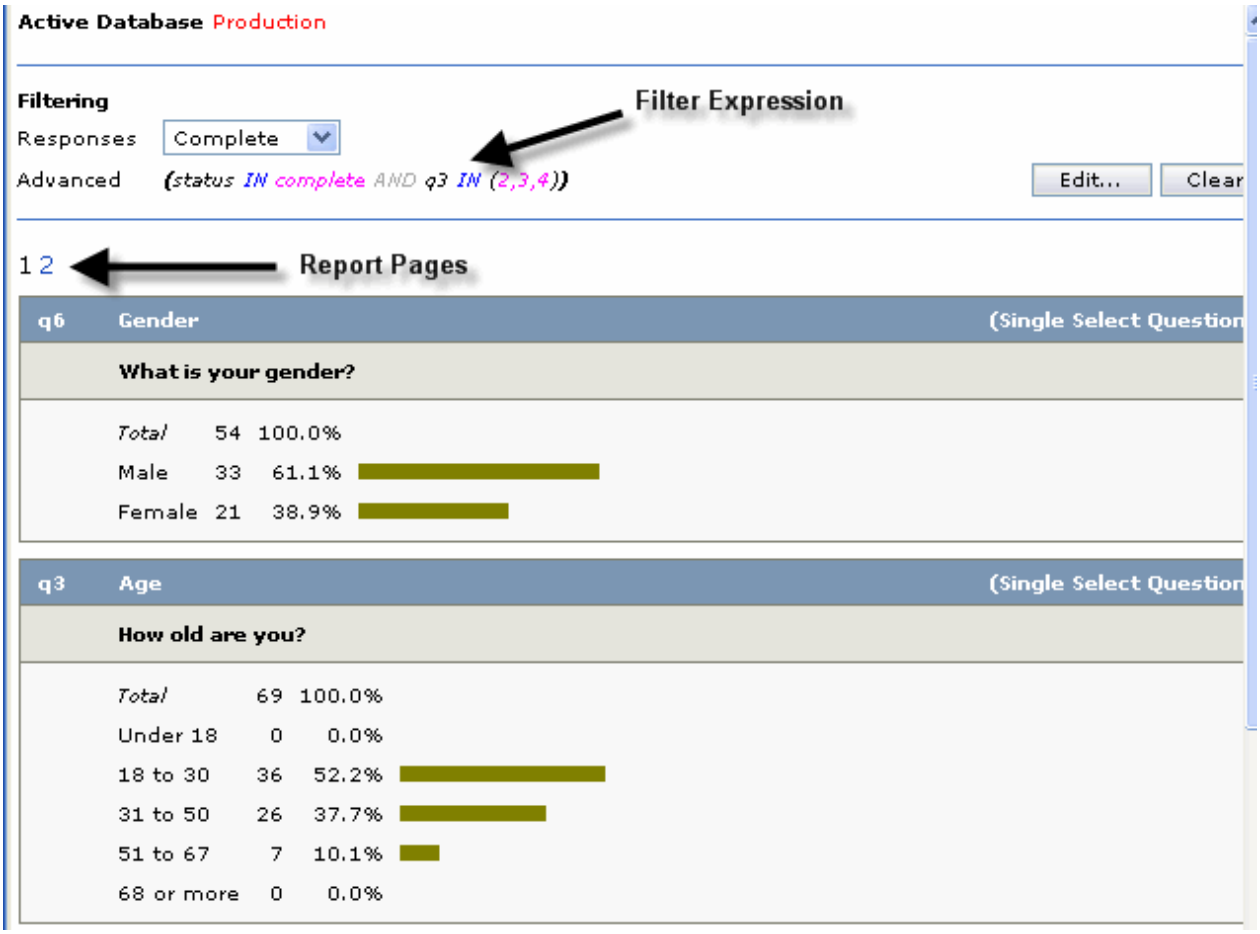


Figure 544 Example of a filtered topline report

If your survey is long and the topline report cannot be displayed on one page, access the following pages via page links at the top of the report.

To clear the filter, click the **Clear** button.

16.5.1. Loops in Topline Reports

When you enter the topline report for a loop, you can look at the data for each loop iteration separately.

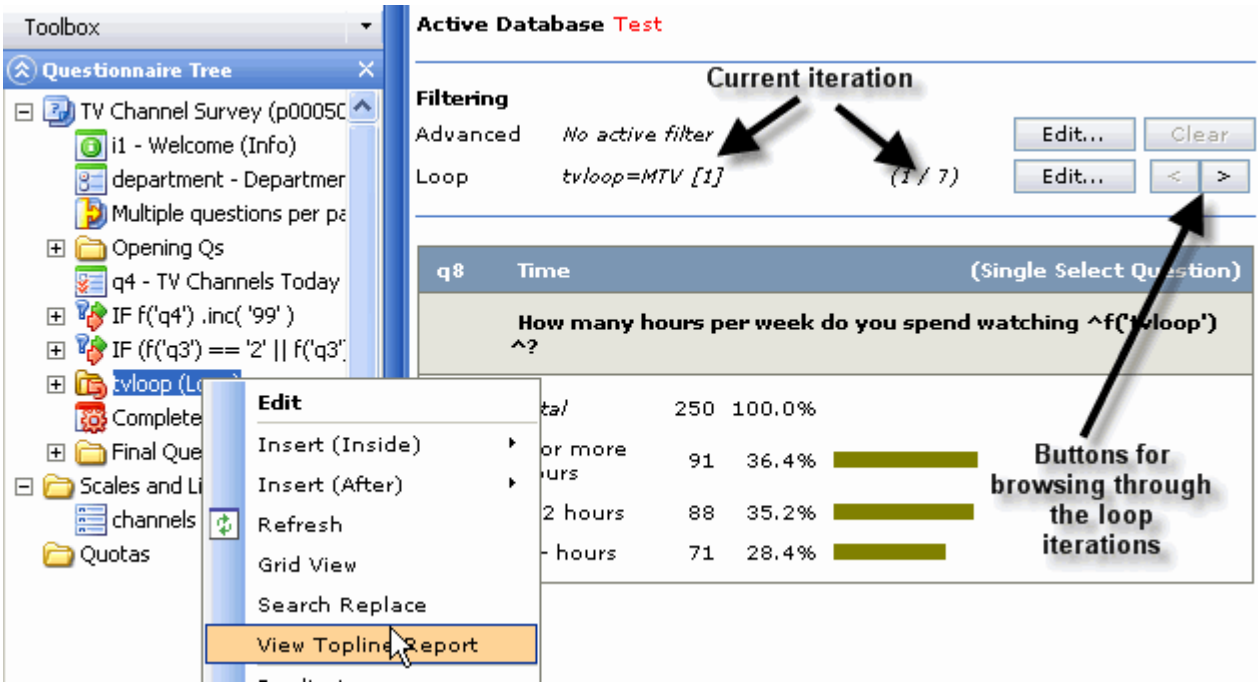


Figure 545 Example of a topline report for a loop

16.6. External Quick Test

External Quick Test generates an externally accessible test link to the survey. You can then make this link available to people who do not have a Confirmit User login. In this way you can allow for example the client to test the survey prior to it being published.

Note: The External Quick Test link has a maximum life of 30 minutes.

Confirmit does not charge for "response" data created using the External Quick Test. However the External Quick Test does not generate or store data in a database; it uses memory for the current session, and the data is deleted when the session is ended. Any data entered during an External Quick Test will therefore not be available for any purpose after the test.

After generating the External Quick Test, you can send the resulting link by email to the tester(s). If you later make changes to the survey, re-launch the External Quick Test to update the survey, then inform the testers of the update. The link will remain the same so you will not need to resend it to the testers.

1. Go to the **Designer > Quality Control > Launch External Quick Test** menu command.

   The page shown in the figure below appears.

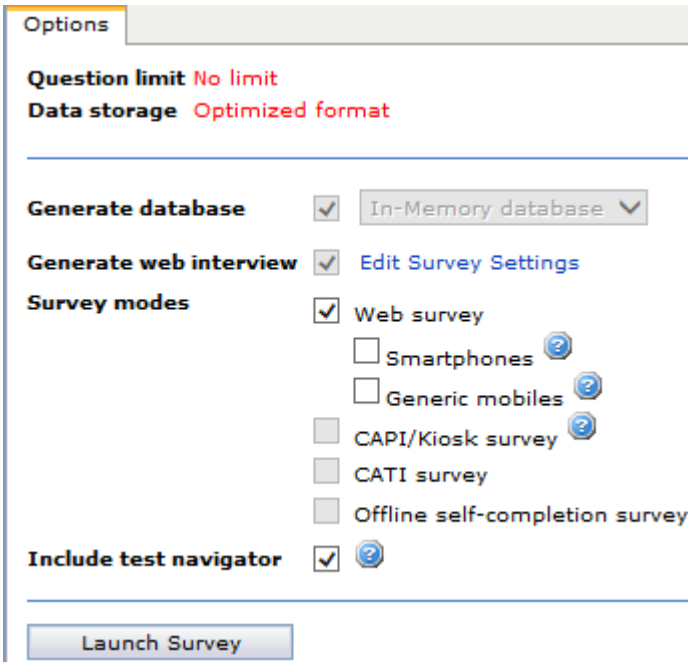


Figure 546 The Launch External Quick Test page

2. Check the boxes for the desired survey modes.
3. The Test Navigator overlay (see The Test Navigator on page 488 for more information) allows users testing the survey to go directly to a particular question to simplify testing of different parts of the survey. Uncheck this box if the navigator is not required.
4. Click **Launch Survey**.

   A Task page opens with a progress bar and task list. When the task is complete, a link to the test survey is displayed (as ringed in the figure below).

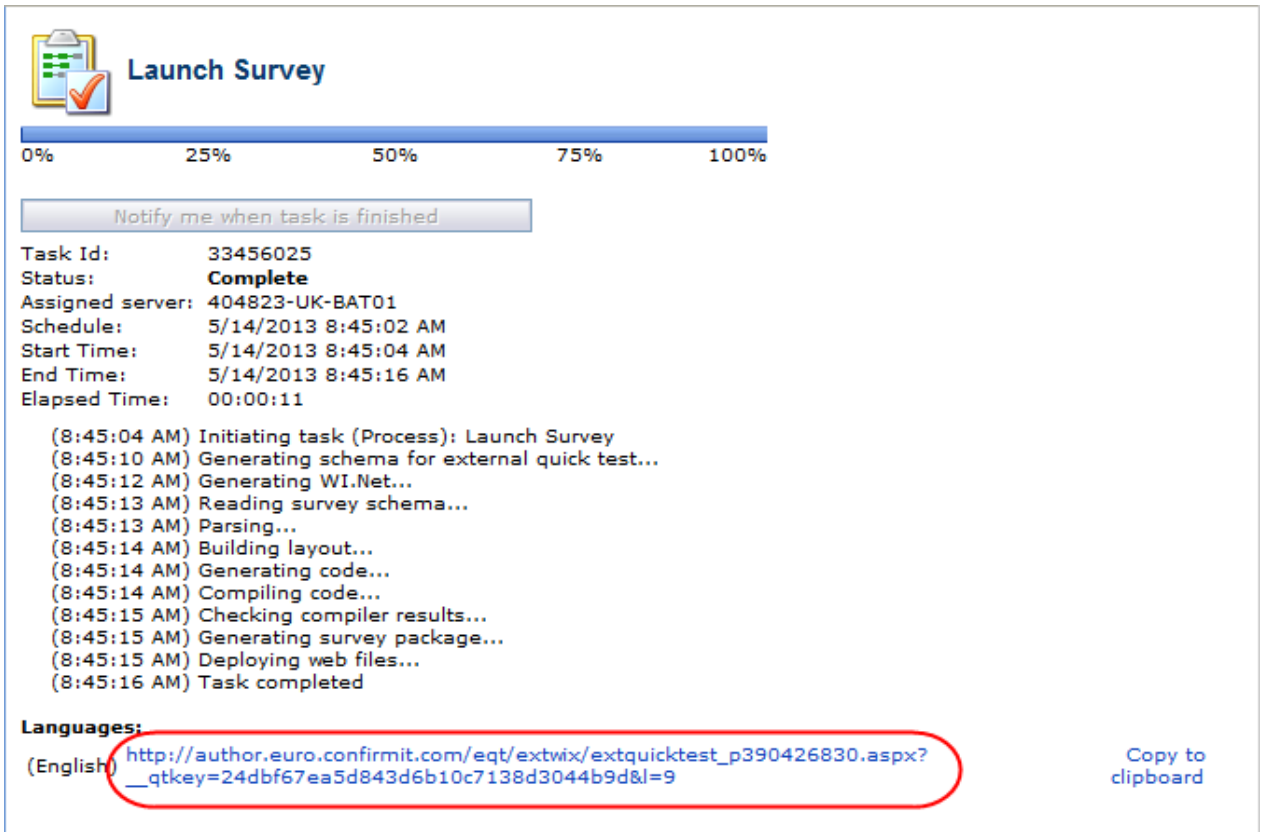


Figure 547 The Task page with the test link

5. Click **Copy to Clipboard** (arrowed in the lower-right corner of the figure), then create an email and paste the link into it. Send the email to the testers.

If you click the **Notify me when task is finished** button, then a message will pop up on your screen when the task is completed. This means you can continue with work in other applications while waiting for the task to run, then return to the survey on completion.

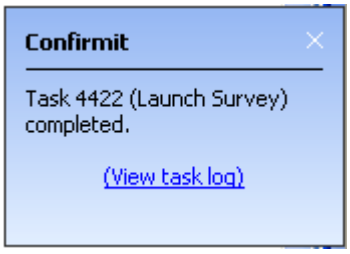


Figure 548 Example of the Task Notification popup

16.6.1. The Test Navigator

When "Include test navigator" is selected, users testing the survey will have access to a Test Navigator overlay. This will be available throughout the survey, and allows them to go directly to a particular question to simplify testing of different parts of the survey. Note that a user does not need a Professional User license to be able to test surveys and employ this functionality.

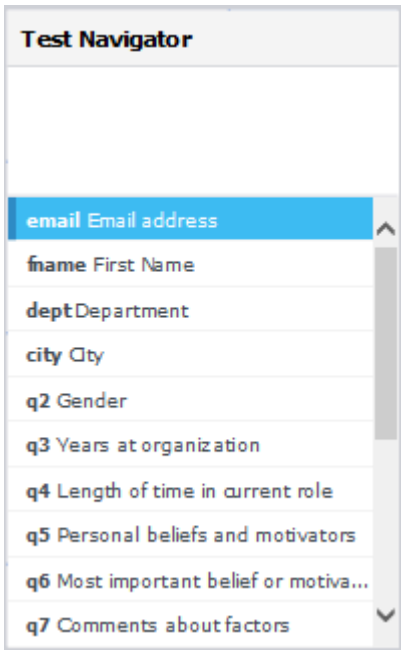


Figure 549 Example of the Test Navigator overlay

The first question on the current page is highlighted. Non-interactive questions and nodes, such as conditions, hidden questions, folders and Info nodes are not displayed, and for loops, the loop itself is not displayed but the questions contained within are and you are taken to the first iteration of the loop. Call blocks and the questions within them are not available to jump to.

You can drag the navigator to a different area of your screen if it is hiding something you need to see. The navigator's location is remembered for a user, and it will open in that location the next time the user opens a survey for testing that makes use of the navigator.

This overlay is supported by IE9+, Chrome and FireFox, and applies to desktop rendering only.

16.7. Scanning for HTTP Content

Your survey is built on a secure (**https**) site. You can however add content to your survey (images, film clips etc.) which are located on non-secure (**http**) sites. Such links can allow unauthorized access to the survey so are not recommended. For now, in the event your survey contains references to non-secure content, a warning will be presented in the Launch Survey page and the survey will compile. However in the near future Confirmit Horizons will no longer allow such links to non-secure pages and the compilation will fail.

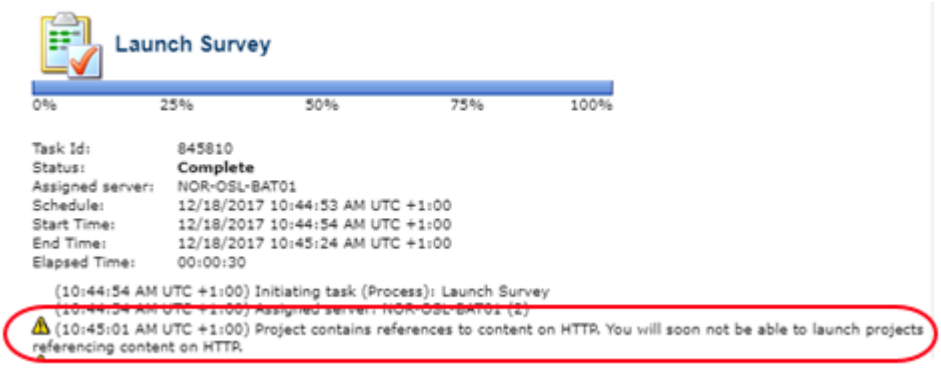


Figure 550 Example of the insecure content warning

If such a warning is presented you should investigate and remove the reference or move the non-secure content to a secure site.

Before running the launch process, or if you receive such a warning, you can scan your survey layouts, reports and templates for http content. Proceed as follows:

Scanning a survey

1. Go to the **Designer > Quality Control > Scan for HTTP content** menu item.

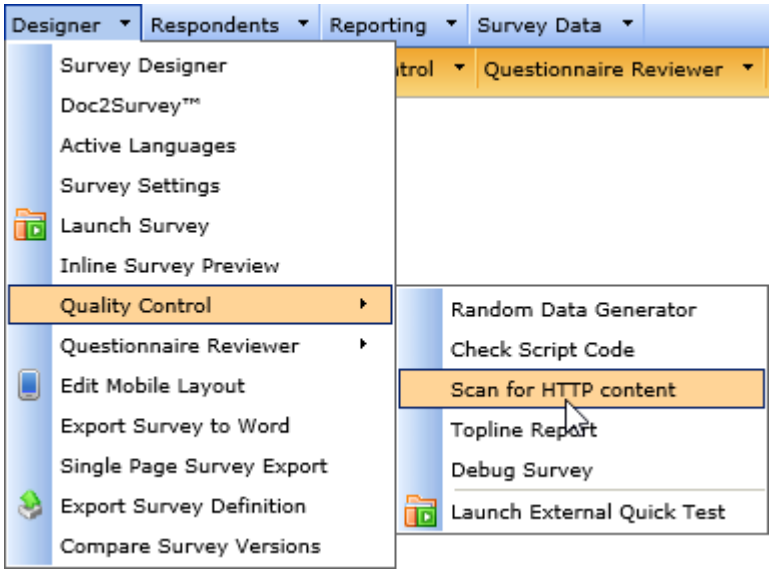


Figure 551 The Designer > Quality Control > Check HTTP content menu item

The survey is scanned. In the event no http content is found then a message to that effect is presented in the design window. If http content is found then an Action Required message is presented towards the lower-right corner of the Authoring window.

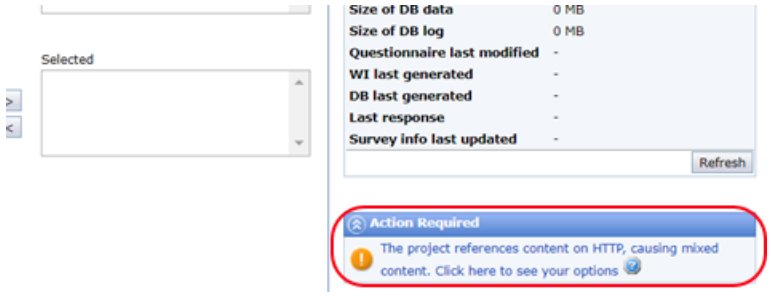


Figure 552 The Action Required message

Scanning survey layouts

1. Open the survey layout you wish to scan (see Accessing Survey Layouts on page 67 for more information).
2. In the Layout and Styles toolbox, click the **Scan for HTTP content** button.

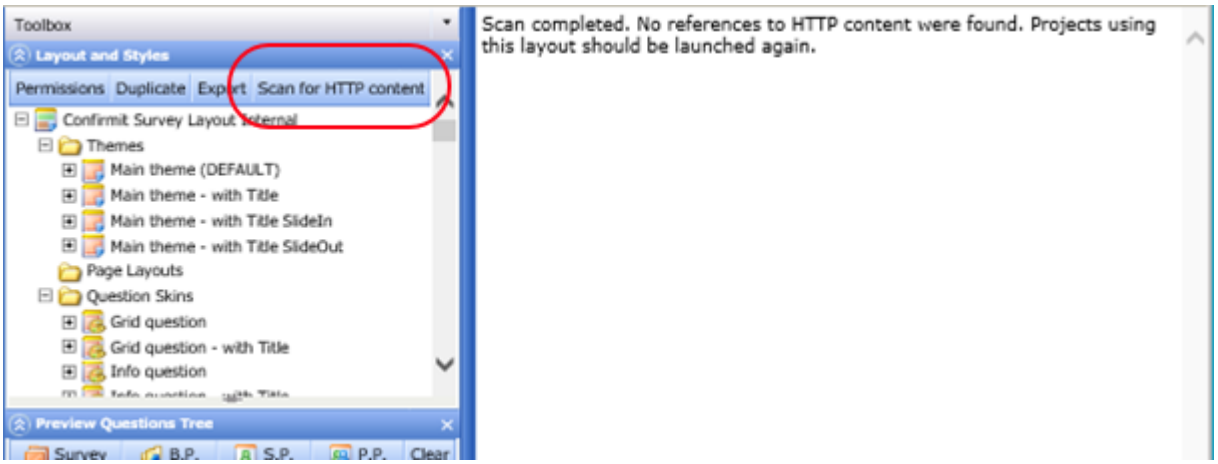


Figure 553 Scanning a survey layout

The survey layout is scanned. In the event no http content is found then a message to that effect is presented in the design window. If http content is found then an Action Required message is presented towards the lower-right corner of the Authoring window.

Scanning a report

1. Open Reportal, then find and open the report you wish to scan.
2. Go to the **Report > Quality Control > Scan for HTTP content** menu item, or in the Quick Links area click the **Scan for HTTP content** link.

   The report is scanned. In the event no http content is found then a message to that effect is presented in the design window. If http content is found then an Action Required message is presented towards the bottom of the Report Summary window.

Scanning a report template

1. In the Reportal Quick Access pane, select **Template List** then select the template you wish to scan.
2. In the Template Edit page toolbar, click **Scan for HTTP content**.

   The report template is scanned. In the event no http content is found then a message to that effect is presented in the design window. If http content is found then an Action Required message is presented.

17. Preparing for Data Collection

A large number of settings can be made for the survey to specify encryption settings, testing options, how the survey is to behave under particular circumstances, which channels are to be used, the layout, etc. The sections in this chapter describe the options available.

17.1. Survey Settings

Before you generate the interview files, you must define the survey settings for the survey behavior, layout, and validation. Do this on the Survey Settings page. To open this page, go to the **Survey Management > Survey Settings** menu command. This page can contain up to seven tabs as follows:

- General Options.
- Survey Channels.
- Web Options.
- CAPI/Kiosk Options.
- CATI Options.
- Offline App Options.
- Layout.
- Validation & XSS.

Note: CATI, CAPI and the Offline App are chargeable add-ons. The CAPI, CATI and Offline App tabs and options will only be visible if the add-ons are licensed by your company.

In Test mode, after a web interview is generated, you are presented a link, for example **English**, to the test survey. Click the link to open the survey tree and the survey with the respondent layout. To open the survey tree structure, right-click the survey folder and choose **Expand tree** from the menu.

Once you have generated the survey in Test mode, you can access it again in **Survey Settings > General Options**. In the field *Access existing test interview* you will find the link to the test survey. However, if you make changes to the survey, you will have to recompile and regenerate the survey in order to apply the changes to the survey.

Note that you can hide any questions representing background, panel or hidden variables when using the test mode (see Quality Control on page 472 for more information).

Default Survey Settings templates can be created for the site, company level, or for individual users. Then for example, if the same settings are used for all surveys created by your company, users will not have to go in and set them up for every survey (see How to Create Default Survey Settings Templates on page 524 for more information). Once you have one or more default settings templates available, the **Use system default survey settings** button becomes available.

The tabs are described in the following sections.

17.1.1. The General Options Tab

The Survey Settings page opens at the General Options tab.

Note: The "Handling of invalid data set..." options are only available for surveys using the Optimized database format.

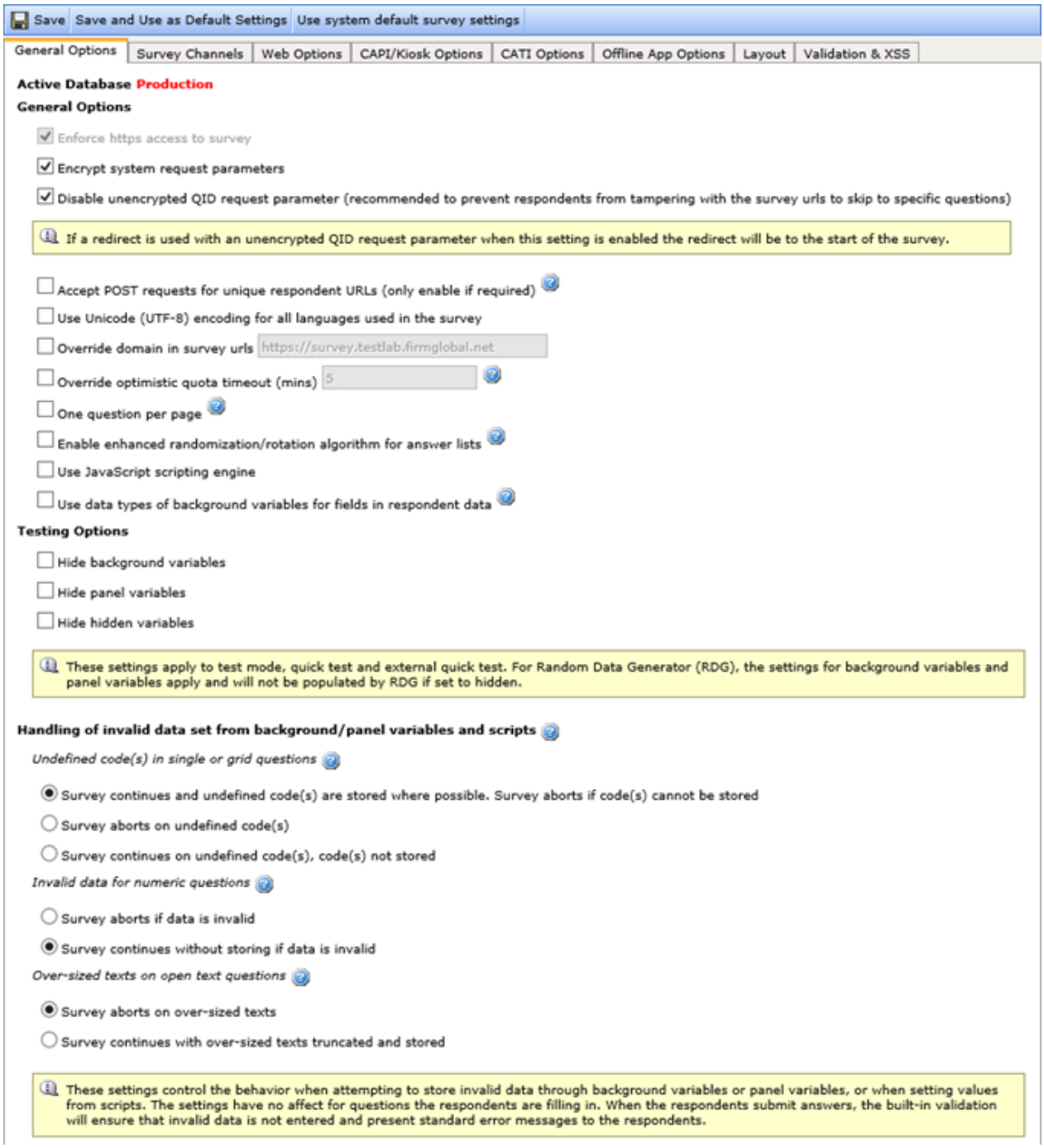


Figure 554 The Survey Settings > General Options tab

The properties are described below.

17.1.1.1. The General Options Tab Properties

The properties on the General Options tab are as follows:

- **Enforce HTTPS Access to Survey -** check this box to enforce HTTPS use by people accessing the survey

Important
If HTTPS is required, then any references to HTTP anywhere in your survey, including URLs to illustrations or links, in HTML styles, external style-sheets or scripts, will cause a warning to be displayed in most browsers. This warning may occur on every page of the survey and, depending on the user's response to the warning, the survey may not be displayed correctly. Faced with this, many respondents will abort the survey! However this is easy to avoid; ensure that all absolute URLs start with "https", and you can use relative URLs if the targets are stored in the File Library **(see File Library on page 157 for more information).** **If you test the survey with a live link in a separate browser window and you do not get any messages, then neither will your respondents.**

- **Encrypt System Request Parameters** - this property increases the security of the system. Leave this box checked to encrypt system request parameters such as:

  r, s, __state, __loop, __seqno and __version

  These will not then be shown in clear text, but encrypted in a __sid__ parameter. This applies to both hidden form fields and URL parameters. Respondent links will then take the form as follows:

/confirm/wix/test_p0003502.aspx?__sid__=KKCCKburQTJA0nxoy3zppzwMNq7TPEZCTqPH8EzXazrpu2_FkhnkHlS-bKIWXZM_0

  If the parameters (r, s, ...) are transmitted in clear text when this feature is turned on, the parameter values will be ignored. The Survey Link will also be encrypted (see The Survey Link Column on page 558 for more information). Attempting to manipulate the __sid__ value will result in an internal error page being shown with an http status code. The default value for new surveys is "checked".

Note: You are strongly recommended to leave this property box checked.

- **Disable QID request parameter... -** prevents respondents from tampering with the survey URLs to skip to specific questions (disabled by default in new surveys).
- **Accept POST requests for unique respondents... -** when this option is checked, attempts to initiate interviews using HTTP POST requests for unique respondent URLs will be permitted. If this option is not checked POST requests cannot be used to initiate the interview. HTTP GET requests can always be used to initiate interviews. This setting should only be checked in scenarios when POST requests are used.
- **Use Unicode (UTF-8) encoding... -** enforces Unicode (UTF8) encoding when the survey is rendered, irrespective of which language is being used in the survey. This will avoid problems such as can occur when the respondent enters characters not expected in the current language/codepage into an answer, which is then saved incorrectly.

Note: UTF-8 enforcement does not apply to emails.

- **Override Domain in Survey URLs** - if you are running a survey for a customer, it is not certain that the customer will want the link to the survey to include, for example, ...Confirmit.com. If you wish to use a domain other than the default in the survey links, you must register the domain (if not already done) and set up a domain record to point towards the public IP address of the interviewing server(s) in the DNS domain manager (see Using Your Own Domain Name for Confirmit Surveys on page 513 for more information). You can then change the domain used in the survey URLs by selecting the **Override domain in survey urls** checkbox and specifying the new domain. It is also possible to set up a permanent domain override as a company-wide setting. If you wish to support HTTPS for the domain, or if you have any questions regarding this feature, contact Support.
- **Override optimistic quota timeout (mins) -** this is the timeout setting to be used when using Optimistic Quotas. In the event a respondent makes no changes to the survey for this timeout period, then the respondent is assumed to have left the survey uncompleted and the Optimistic Quota is decremented for this respondent (see Optimistic Quotas on page 378 for more information). The default value for this timeout is 5 minutes, the minimum value allowed is 1 minute.
- **One question per page -** this allows only one question to be displayed on each page of the survey, irrespective of directives, pagebreaks etc. (any directives ordering multiple questions per page are ignored). When this box is checked, it is not possible to add further directives. Any pre-existing directives will be visible in the Questionnaire Tree, though they will have no effect on the survey and may be deleted by the user. If more than one question is required on a page, then the questions must be placed together inside a Page element.

- **Enable enhanced randomization... -** When questions in the survey are set to use answer list randomization/rotation, the regular algorithm used to randomize the lists results in 'pseudo-randomization'. With this setting enabled, the algorithm will produce lists that are more naturally randomized. Note that questions containing predefined lists will have the same list order for every time the list is used by the same respondent ID, but questions with the same answer list but not based on a predefined list will not necessarily be in the same order. If a respondent completes the survey over several interviewing sessions, the answers will be displayed in the same order for that respondent, irrespective of whether the questions use predefined answer lists. With the setting disabled, the answer list randomization/rotation is determined based on the responseID and the number of answers in the answer list.
- **Use JavaScript scripting engine** - this is a survey-level setting which must be enabled to allow use of the JavaScript engine. When this setting is enabled, JavaScript can operate in all channels (CAWI, CAPI, CATI, AskMe) and all scripts must be in JavaScript, not JScript.NET. All script input areas (script nodes, masking, validation etc...) then display a text box stating that the JavaScript engine is in use.
    - **Use UTC time in scripting** - this property appears when Use JavaScript scripting engine is selected. When this property is not selected, the system will use server local time (same as JScript.NET) for captured dates; when it is selected, the system uses UTC time.

Note: For AskMe, and for CAPI on Android or iOS, the JavaScript engine MUST be used.

- **Use data types of background variables...** - when this property is enabled, the corresponding fields in respondent data will be set according to the question types of the background variables. For example, if the survey has a numeric background variable "age", the corresponding field "age" in the respondent data will also be set as numeric. It will also adhere to the number of digits/decimals settings for numeric questions, and the field width settings for open text questions. If this property is not set, all fields uploaded to respondent data will be open text variables with a field width of 255, regardless of the question types of the background variables. Using this setting will improve validation on upload of respondent data since only valid values will be allowed, and will provide better sorting and filtering when viewing respondent data in Survey Designer.

Note: This also allows you to set up your surveys so that they will accept more than 255 characters in respondent data, by using this new setting in combination with a higher (or no) field width on an open text background variable. However for open text fields with no field width set in the background variable, or with the field width set higher than 4000, the respondent table will be given a field width of 255.

- **Hide background variables -** hides these variables when using the test functionality (see Quality Control on page 472 for more information).
- **Hide panel variables -** hides these variables when using the test functionality (see Quality Control on page 472 for more information).
- **Hide hidden variables -** hides these variables when using the test functionality (see Quality Control on page 472 for more information).

The following options are only available for surveys using the Optimized database format. The settings control how invalid data is handled when being set as background or panel variables or when values are set from scripts. The options allow you to control what happens if such a scenario arises for single, grid, numeric or open text questions. The result will be that the data is either committed or not, and that the survey either continues or aborts. If this scenario occurs, an email will be sent to the person responsible for the survey informing them about the issue. If the survey is aborted due to the invalid data, they will be sent an appropriate error via email.

- **Undefined codes in single or grid questions** - "Undefined codes" are codes that do not exist in the answer list for a single question, grid question or a single inside of a 3D grid question. On attempting to store invalid codes, if a data constraint means that the codes cannot be stored, the survey will abort.
- **Invalid data for numeric questions -** "Invalid data" refers to non-numeric values or values outside of the total digits/decimal places restrictions.
- **Oversized texts on open text questions -** "Over-sized texts" refer to texts that are longer than the Open Text field width settings.

17.1.2. The Survey Channels Tab

The Survey Channels tab is where you define the type of survey - a Web survey, CAPI/Kiosk survey, CATI survey, offline app or any combination.

Note: The Offline self-completion app is branded by Confirmit as AskMe. Both terms are used in this documentation.

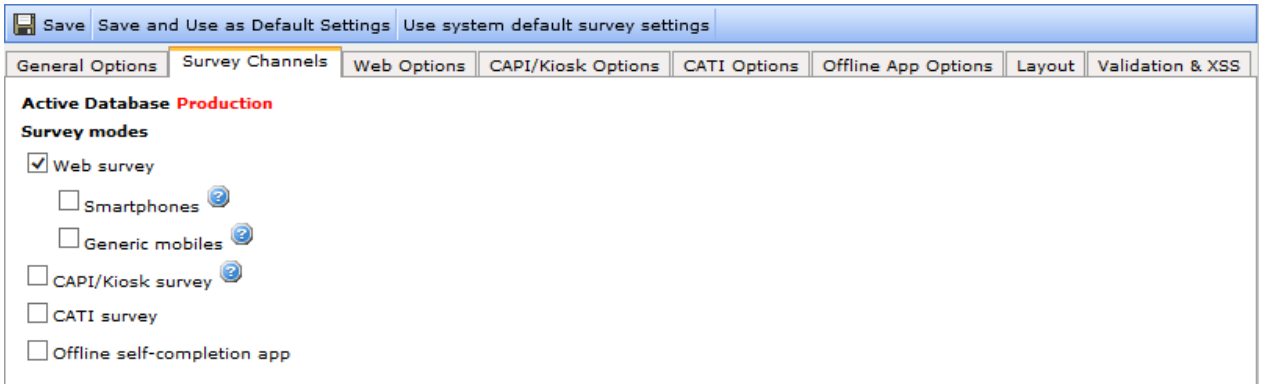


Figure 555 The Survey Settings > Survey Channels tab

When you select the Web Survey channel, the two sub-options become available (see The Survey Channels Tab Mobile Phone Options on page 496 for more information).

If you then select the Smartphones option, touch rendering will be activated for the survey. Note that you can switch off the touch rendering functionality for individual pages in the survey by going to the page editor for the survey page in question (see The Page Object on page 303 for more information).

Note: CATI, CAPI and Offline self-completion are all add-ons and subject to payment. The tabs will only be available if your company has purchased the appropriate licenses.

Note that you must select the CAPI/Kiosk Survey option to activate the options on the CAPI/Kiosk Options tab (see The CAPI/Kiosk Options Tab on page 515 for more information), and the CATI Survey option to activate the options on the CATI Options tab (see The CATI Options Tab on page 516 for more information). When the CATI Survey option is selected, an additional "Telephony" object becomes available in the New Objects toolbox. Selecting the CATI Survey option also activates additional options for quotas (see The Grid Mode Settings Tab on page 360 for more information) and (see The List Mode Settings Tab on page 365 for more information).

- **Offline self-completion app -** check to allow respondents to use the AskMe app (see AskMe - Introduction on page 654 for more information). Note that you must select this option to activate the options on the Offline App Options tab

Important
Use of Confirmit Apps may include the use of third party components (“TPC”s), including but not limited to the GoogleTM Firebase range of products. The continued operation of certain features of Confirmit Apps may depend on the continued proper operation of those TPCs. CONFIRMIT explicitly disclaims any warranty for or on behalf of TPCs. Certain device information, such as but not limited to operating system and model, may be forwarded to the provider of the TPCs for ensuring proper and efficient wording of the App and in accordance with the TPC’s terms and conditions. For a full list of TPCs for your specific App, please contact privacy@confirmit.com.

17.1.2.1. The Survey Channels Tab Mobile Phone Options

When the Web Survey channel is enabled, two survey renderer sub-options become available. These options adapt the survey layout for optimal display on mobile phones. The options can be selected from **Survey Settings > Survey Channels** or from the **Designer > Launch Survey** page. The supported mobile categorizations are currently:

1. Smartphones (see Smartphone Details on page 501 for more information).
2. Generic mobiles (includes feature phones, Blackberry, Windows Mobile, Windows Phone 7, Symbian etc.) (see Generic Phone Details on page 502 for more information).

Either or both of the mobile renders can be selected for a survey. When the required option(s) are selected and the survey has been launched, the appropriate renderer will be used to deliver the survey pages formatted for the device being used by the respondent. Identification of the device being used is handled automatically by Confirmit based on the device's user agent, and cannot be changed. This means that desktop (PC or Mac) and tablet users are identified and use the standard web renderer, iPhones, Android phones and iPods will use the "Smartphones" renderer, and all the rest will use the generic mobile renderer.

Note: If a survey is launched with touch rendering enabled, but a respondent enters with a touch device with Javascript disabled, the survey engine will check and render in generic if that is enabled, otherwise it will render in desktop mode.

Note: If you have created some heavily customized pages or questions which would not be included in Touch (iPhone/Android) rendering, rather than turning off the Touch functionality for the entire survey to allow such customized pages/questions to use normal rendering on Touch mobiles, you can turn off Touch for the specific page (see The Page Object on page 303 for more information).

Note: Tablet devices such as the iPad, Android tablet, Blackberry Playbook and HP Touchpad will have surveys delivered using the normal desktop renderer; they will not use the mobile optimized renderer.

The page layout used by the mobile renderers is configurable on the Mobile Layout Editor page. This page is accessible via the **Survey Designer > Edit Mobile Layout** menu command, or directly by double-clicking on the **Mobile Layout** node in the **HTML Styles folder**. In the Mobile Layout Editor page you can edit the font attributes, and if you select a question to be displayed, a preview of the layout is provided.

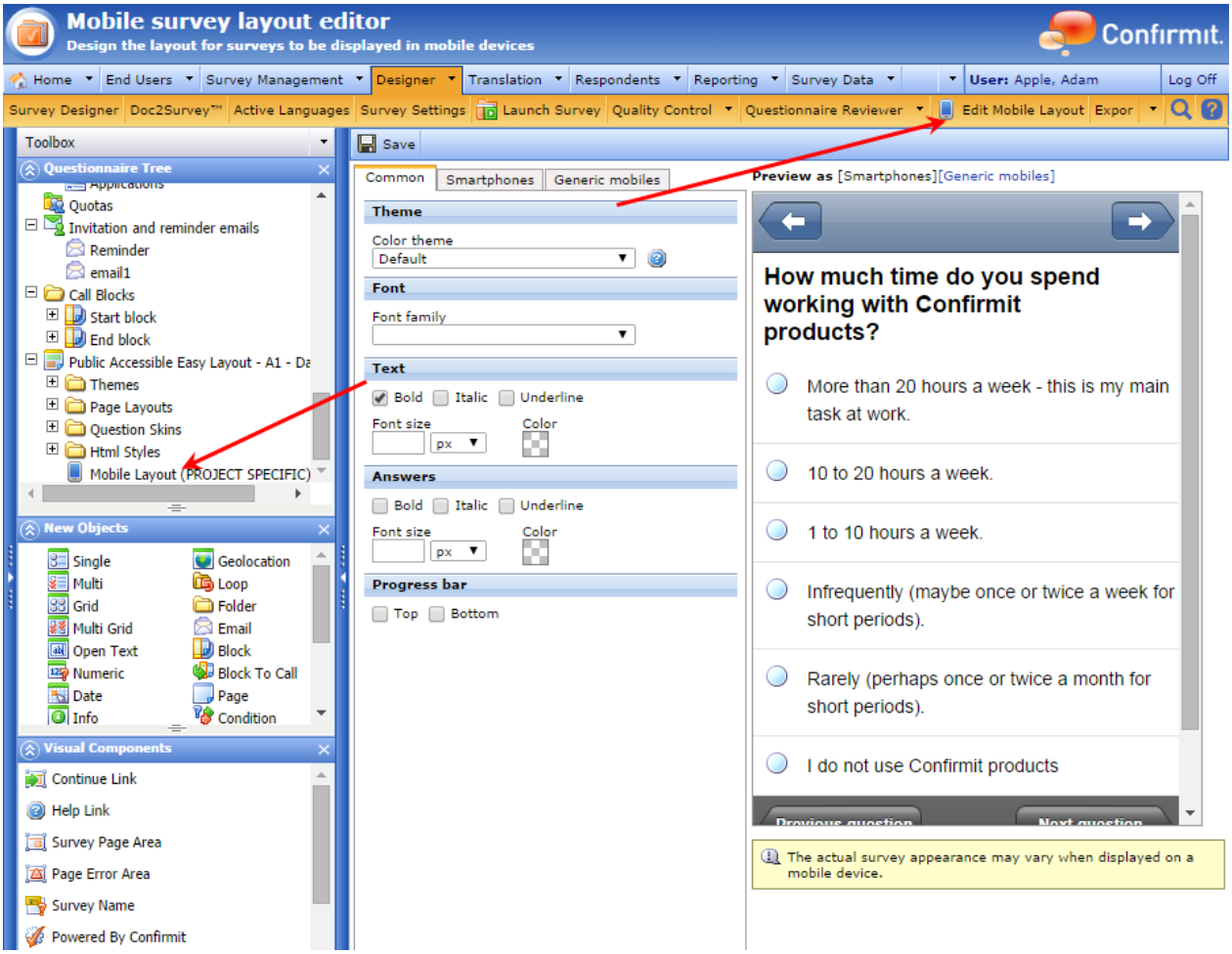


Figure 556 The Mobile Survey Layout Editor page

Note: If you attempt to edit the mobile layout before a mobile phone mode is selected in the Survey Modes list, then you will be warned that the survey is not enabled for mobile phones and you will be asked to select at least one mobile mode before continuing.

Note: All survey pages delivered will include a viewport meta tag to improve the experience on mobile devices for respondents. The following meta tag will be included in all survey pages delivered to respondents:
<meta name="viewport" content="width=device-width, initial-scale=1.0"/>

17.1.2.1.1. The Common Tab Options

The Common tab contains the options that are common to all phone renderings. Options that are specified here will be applied to all renderings.

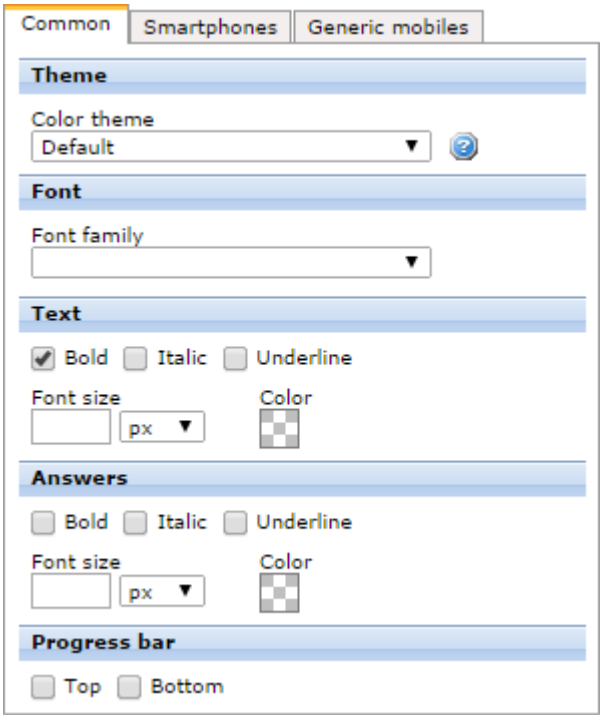


Figure 557 The Common tab

The options are:

- **Color theme -** eight themes are available (Default, Red, Green, Light Blue, Gray, Dark Gray, Black and Image Background). These themes control the color palate used throughout the survey. This controls the background color, color and style used for navigation buttons, and the style used for the radio-buttons and checkboxes. If you wish to use a background image in the Smartphone rendering, the most appropriate theme to select is the Image Background theme, then specify which images are to be used in the Smartphones tab. Note that themes cannot be customized, and you cannot create your own themes.
- **Font family -** defines the font family that is to be used for all text characters presented on the mobile's display.
- **Text -** check the boxes and select as required to apply the font characteristics, font size and color to be used for the texts presented on the display.
- **Answers -** check the boxes and select as required to apply the font characteristics, font size and color to be used for the answers presented on the display.
- **Progress bar -** select whether you wish the progress bar to be displayed at the top and/or the bottom of the display. Note that the Include Progress Bar option in the Survey Settings > Layout tab must be checked for the progress bar to be available.

17.1.2.1.2. The Smartphones Tab Options

The Smartphones tab contains the options that are specific to these types of mobile device.

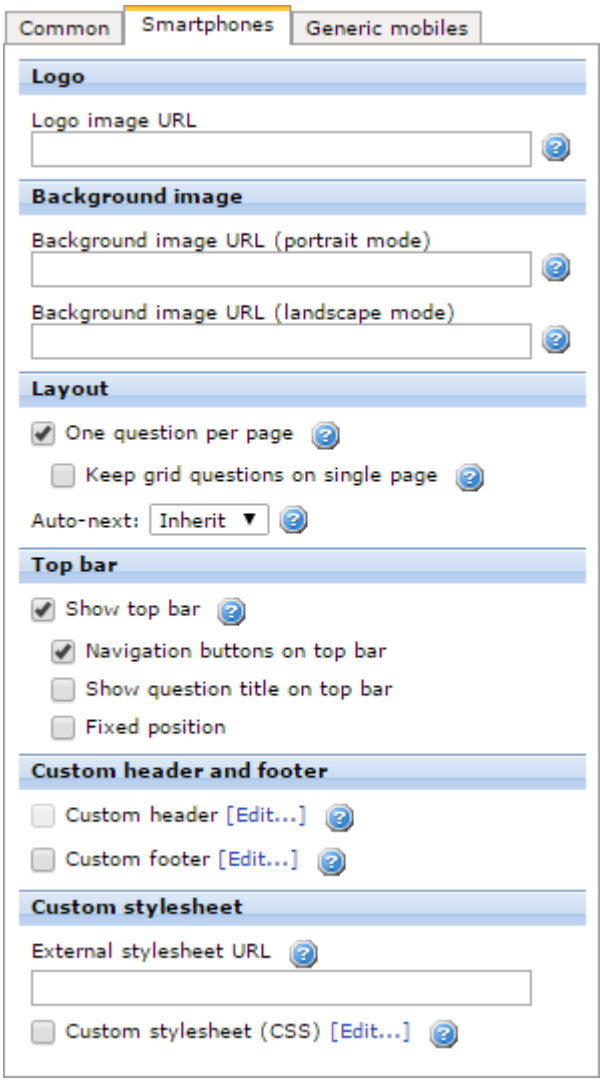


Figure 558 The iPhone and Android tab options

The options are:

- **Logo image URL -** allows you to present a logo in the device's top bar. The logo file can be located anywhere, but you are recommended to store it in a location where it will be accessible for the lifetime of the survey. Note that the Show top bar option lower in the page must be checked such that there is a top bar for the logo to be presented in.
- **Background image -** if the Background Image theme is selected in the Common tab (see The Common Tab Options on page 498 for more information), then here you can select a background image to be presented. For themes other than “Image Background”, the image will only be visible below the bottom of the survey question area. When the “Image Background” theme is used, the image will be visible underneath the survey text (the transparency of the survey page can be adjusted). Note that you must specify the images that are to be used for landscape and portrait presentations.

- **One Question Per Page -** if this is checked, then in the event a survey page has more than one question on it, the page will be divided up such that only one question is presented at a time on the mobile device. Be aware that the page division is performed within the mobile device, and the answers to the questions are only submitted back to the server once all the questions on the original survey page have been answered. So if the respondent leaves the survey before providing the answers for all the questions on the survey page, no answers will be registered for any of the questions on that page. Note that questions in star rating, slider or drop-down grids and questions using answer buttons are kept together on one page irrespective of this setting..
- **Keep grid questions on single page -** check this box to prevent the "One Question Per Page" property from displaying normal appearance grid questions as a series of single questions on separate pages.
- **Auto next -** controls the automatic page transition functionality for respondents using mobile rendering. The options are:

    o **Inherit –** the page transition will conform to the survey setting "Auto-next (proceed to next page automatically when possible)" in the layout tab. If "Auto next…" is enabled, mobile rendering will then also automatically move to the next question.

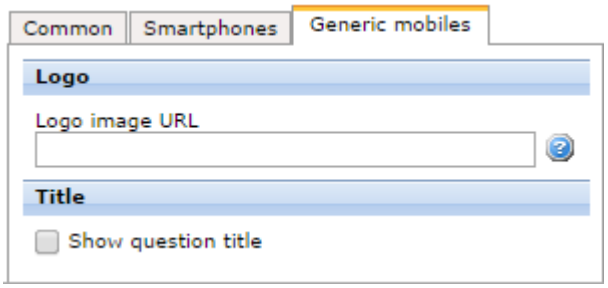
    o **On** – the next page is automatically displayed when the current question is answered.

    o **Off –** the next page is not displayed automatically; the respondent must touch "Next" to move to the next question.

  When either On or Off is selected, the "Auto-next (proceed to next page automatically when possible)" survey setting does not apply to mobile rendering.
- **Show top bar -** check to display a top bar above the questions and answers on the mobile display. If this option is not checked, then the options under this will not be available, and you will not be able to display a logo.
- **Navigation buttons on top bar -** if you have selected to display a top bar, then you can include the navigation buttons within it.
- **Show question title on top bar -** if you have selected to display a top bar, then you can display the title of the current question on it. Note that you cannot have both a logo and the question title in the top bar simultaneously; if a logo URL is selected then this Show questions... option is inactive.
- **Fixed position -** fixes the top bar at the top of the device's display such that it remains visible when you scroll down the page.
- **Custom header -** allows you to use HTML code to define a header to appear at the top of the survey page. Click **Edit...** to open a coding input overlay. The code can include references to f() or other server-side piping, but it cannot contain JavaScript. The custom header will appear at the top of every page. Note that the Show top bar option (see further up on the page) must be unchecked to be able to supply a custom header; if the top bar is enabled a custom header cannot be included.
- **Custom footer -** allows you to use HTML code to define a footer to appear at the bottom of the survey page. Click **Edit...** to open a coding input overlay. The code can include references to f() or other server-side piping, but it cannot contain JavaScript. The custom footer will appear immediately below the bottom navigation bar and will appear on every page.
- **External stylesheet URL -** you may wish to use an external style sheet to format the layout to be used on the mobile device. In this case you must either create the stylesheet and specify its URL in this field, or check the Custom stylesheet box and click **Edit**. This opens an editing overlay in which you can create the desired stylesheet.

17.1.2.1.3. The Generic Tab Options

The Generic mobiles tab contains the options that are specific to other types of mobile device.



The options are:

- **Logo image URL -** allows you to present a logo at the top of the survey layout. The logo file can be located anywhere, but you are recommended to store it in a location where it will be accessible for the lifetime of the survey.
- **Title -** you can display the title of the current question at the top of the page.

17.1.2.1.4. Smartphone Details

When the “Smartphones” interviewing channel is checked for a survey and the respondent is using a smartphone, the survey will be optimized for this device type using touch rendering for the survey. The following devices will receive smartphone rendering: iPhone, Android phones, Windows Phone 8 and Firefox OS.

Touch rendering will be activated for the survey. Note that you can switch off the touch rendering functionality for individual pages in the survey by going to the page editor for the survey page in question (see The Page Object on page 303 for more information).

Grid and 3D grid questions are split into separate questions; a grid question into a series of single questions, and a 3D grid into the various questions contained in the 3D grid. The exception to this rule is grid questions with slider or drop-downs, which will be kept together.

When the "One question per page" mobile layout setting is enabled, each question is delivered as a separate page to the respondent, irrespective of how many questions are on the "original" page in the survey. However the questions are only submitted back to the server when the total "original" survey page is completed. Server-side validation is then performed, and any changes required to answered questions (due perhaps to missing answers, answers outside required limits etc.) are presented to the respondent with the appropriate error message.

Note that client-side validation of the respondent's input is performed to prevent the need to submit data to the server on a question-by-question basis. The validations performed are:

- If an answer is required.
- Min/max/equal number of answers.
- Force sum of answers.
- Numeric ranges.
- Decimal validation.
- Ranking.
- Size of open text.
- Other property for single/multi choice questions.

The following functionality is not currently supported:

- Client side scripting (embedded in the page) will be stripped and will not be included. HTML tags embedded within the page (in for example question or answer texts) will be executed.
- Card sort - this will be rendered as a grid question.
- Formatting assistance is not applicable. Numeric questions are rendered as the HTML 5 number input type, so will automatically use the numeric keyboard and accept numbers only.

- Cell click is not applicable. The answer alternatives are automatically rendered so that respondents may tap anywhere on label or the large radio buttons/check boxes.
- Open text resize is not applicable.
- Answer buttons are not applicable.
- Left and right text - the right text will not be displayed.
- Style options (including category level options) and all survey layout options are ignored.
- Grid repeat headers is not applicable.
- Grid bottom headers is not applicable.
- Grid left and right text - the right text will not be displayed.
- Drag and drop ranking - these will be rendered as regular ranking questions.
- 3D-Grids with Other-specify for Answer Other - the open-text input box will appear under the question of the first grid column only.
- Questions rendered using level Flex extensions - these will be rendered as the generic question type.

17.1.2.1.5. Generic Phone Details

The Generic phone renderer delivers surveys to respondents optimized for older phone types that have HTML-capable browsers. This rendering is different from the Smartphone renderer. Here the survey rendering uses a similar looking theme to the Smartphone renderer, but without features requiring client-side scripts (advanced WI features). It does not have the client-side validation that is included with the Smartphone renderer, nor does it include the ranking and min/max/equal experience. Geolocation questions are supported, but depend on the device for support.

17.1.2.1.6. Rendering Table

The table below shows the rendering that will be used for the different types of mobile phone, depending on the channel that is selected for the rendering in the Launch Survey page.

Device detected	Channel selected	Renderer
Smartphone	None	Desktop
Smartphone	Smartphone	Smartphone
Smartphone	Generic (but not iPhone and Android)	Desktop
Generic	None	Desktop
Generic	iPhone/Android (but not generic)	Desktop
Generic	Generic	Generic
Desktop	Any	Desktop

17.1.2.1.7. Detect Rendering Mode

The GetRenderingMode() function can be used to determine which rendering mode is currently active. This function can for example be used if you would like certain questions only to be presented in the desktop version of the survey.

The return values for GetRenderingMode are:

desktop	Desktop (PC, Mac or tablet)
responsive	Responsive Rendering mode
touch	iPhone, Android phone, iPod touch
generic	Any other mobile phone

To return any of the mobile rendering modes, the mode must be active on the survey and the respondent must access the survey from such a device.

17.1.3. The Web Options Tab

In the Web Options tab you define the overall options, survey type, and survey options for the survey. Note that the options available here will depend on the selections you have made in the Survey Channels tab.

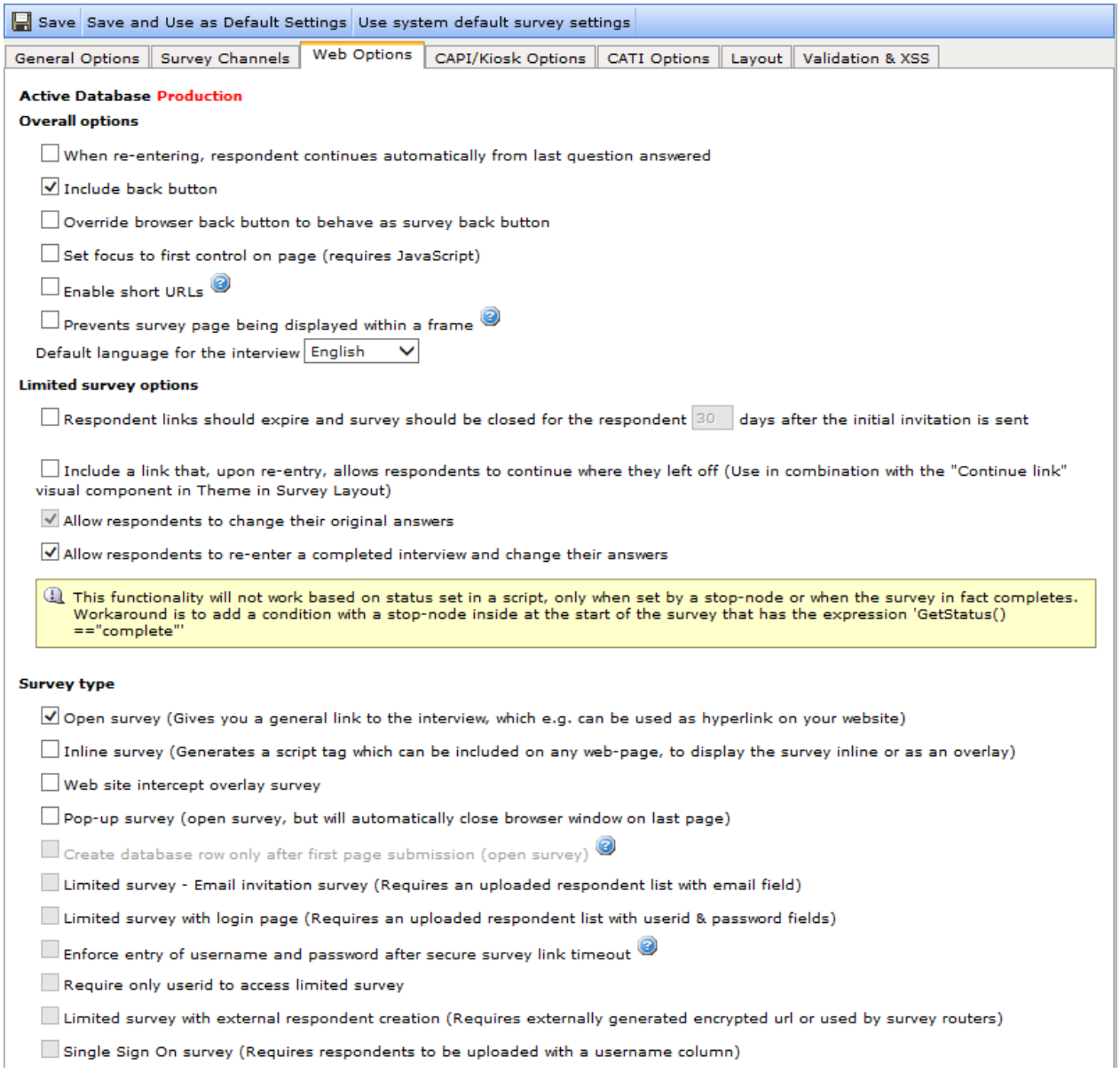


Figure 559 The Survey Settings > Web options

When you select the Survey Type options, various other options may become available.

17.1.3.1. The Web Options Tab Properties

- **Access existing test interview -** [available in the Test mode] a link is displayed for each language. Click the appropriate link to open the survey tree.
- **When re-entering, respondent continues automatically from last question answered -** check this box to send respondents directly to the last question they answered if they leave the survey before completing and then re-enter. Note that this functionality is only applied if the respondent is entering the survey via a direct link.
- **Include back button** - the **Back** button allows the respondent to step backwards in the questionnaire and review/modify previous answers. This option is selected as default. While this box is selected, it also forces the **Allow respondents to change their original answer** option described below to true.
- **Override browser back button...** - causes the browser's **Back** button to simulate a click of the **Back**-button in the survey.
- **Set focus to first control on page -** ignores all the Windows toolbar controls and sets the focus to the first Confirmit control on a page to avoid the respondent having to tab through browser menus etc.
- **Enable short URLs -** [The Short URLs functionality is an add-on. Contact Confirmit Support for details]. To avoid texts that are too long, users who wish to send survey invitations and reminders through SMS need shorter survey URLs than the standard respondent URLs used by Confirmit. When this property is enabled, the respondent URLs will be on the short format. Note that short URLs expire after six months of inactivity; either six months after a link was last accessed, or if never accessed, six months after the link was created. Note also that for performance reasons the short URLs will be recreated each time you view or make changes (you go to the **Respondents > Edit** menu, launch the survey, email the short URL etc.). Previously created URLs will remain valid.

Note: Due to the shorter key, short URLs are inherently less secure than full encrypted URLs. The Short URL functionality is intended to be used when there are restrictions on the length of the message, as in for example SMS messages. In all other cases you are recommended to use regular encrypted URLs.

- **Prevents survey page being displayed within a frame -** when this option is checked, if the survey page is placed within a frame then it will not appear and it will not be possible to start the survey. Surveys with this enabled will not be displayed without JavaScript being enabled in the browser. This is recommended for security reasons to prevent click-jacking.
- **Default language for the interview -** select the language to be used as default from the list of languages available for the survey.
- **Respondent links should expire... -** you can specify that a respondent's link to the survey will expire a set number of days after the initial invitation email is sent, even if the survey itself is still open. The expiry date is based on the date registered for the first email sent to the respondent for this survey (see The Editor Window on page 550 for more information), and the survey will close at midnight (23:59.59) on the specified day. Check the box and type in the required number of days. Note that the day the first email is sent is included in this number. So for example, setting this value to 1 and sending an invitation at 2pm would mean the survey will close for those respondents at midnight the same day.
- **Include a link that, upon re-entry…** - this feature applies to Limited Surveys with the Generate Back Button option selected, and allows respondents to continue where they left off. Use it in combination with the "Continue link" visual component in Theme in Survey Layout. If the respondent returns to a partially completed interview, he/she will be brought to the very beginning of the questionnaire and, if necessary, will be able to modify his/her answers. If the respondent does not want to modify previously given answers, he/she will be able to click the link to be taken to the point at which they left off, and can then continue taking the survey from there.
- **Allow respondents to change their original answers** - this option controls the way in which the generated interview handles re-entry to a questionnaire page. Re-entry to Limited surveys can occur if a respondent uses the browser's **Back** button, or if he/she returns to the questionnaire using the URL received in the email requesting participation in the survey. If the survey is to be “one-shot”, then do not select this option. The interview will then behave as follows:
    - If a respondent has completed the questionnaire and attempts to return to it, then the interview program displays a “Survey already completed” message.

o If the respondent returns to a partially completed interview, then a “You have already completed parts of the questionnaire. Press OK to continue” message is displayed.

o If it is detected that the browser's back-button has been used, then a “Previous answers may not be modified. Press OK to continue” message is displayed.

- **Allow respondents to re-enter a completed interview and change their answers** - this option applies to Limited surveys (login page and cryptic link). It controls whether the respondents can enter the survey after they have responded to the whole interview, and the interview is complete.

Note: The generator supports two kinds of surveys: limited and open. There are two types of limited surveys: cryptic link and login-page-protected surveys. Limited surveys can only be accessed by respondents identified in a respondent list **(see Handling Respondents in Limited Surveys on page 540 for more information).**

When you do not choose the Limited Survey option in the Web Interview Generator, an open survey will be generated. Respondents will be able to access the survey through the same link. You can generate a pop-up survey, or you can also protect an open survey with a password by programming a password in the questionnaire and distributing it to all respondents.

- **Open Survey** - open surveys may be answered by anyone who wishes to do so. As such, they are suitable for surveys where the respondents' identities cannot be established in advance, for example Web site evaluations.
- **Inline survey** - allows you to embed your survey into any web page without having to use iFrames. When you select this option and launch the survey, a script tag is generated which you can then include on the web page. When someone goes to that web page, the survey will be displayed "in-line" (as an overlay). When you select this option, additional properties become available (see The Inline Survey Options on page 507 for more information), and the **Inline Survey Preview** item becomes available in the **Designer** menu (click this to preview the survey as an "inline" page; click **Survey Settings** to return to the Survey Settings page). Note that for inline surveys a limit is imposed on the length of responses allowed - an error message is displayed on launch if the survey includes unrestricted open text questions or questions with a field width greater than 500 characters. Note also that you can set a theme to be the "Inline theme" (see Themes on page 76 for more information). This theme will then be used by default for inline surveys.
- **Web site intercept overlay survey -** enables you to place a button on for example your company website, that will ask a visitor if they wish to complete a short survey, for example to rate the website or information they have been given (see Web Site Intercept Overlay Survey on page 508 for more information).
- **Pop-Up Survey** - you can create a survey that pops up automatically when for example someone enters your website. Check this box to create the necessary code, which you can then copy to the website (see Pop-up Surveys on page 510 for more information). The browser window will close automatically when the respondent reaches the last page. If you launch the survey in the Test database first, the Pop-up Wizard opens in which you can set up the pop-up window.
- **Create database row only after first page submission -** when this setting is enabled, delivery of the first page of the interview to the respondent will no longer be considered as the respondent starting the interview. The survey will therefore no longer create database rows (in the respondent, responseX and response_control tables), and the “Incomplete” count will also not be incremented, at this point. Instead the rows will be created only when a response to the first page is received. This applies to all areas of Confirmit, the only exception being that the Interview Progress overlay will contain a additional field “Total interviews initiated” (see Interview Progress on page 188 for more information). The field displays the count of respondents who have received the first page of the interview irrespective of whether or not the page has been submitted. This field will only appear if the survey is open with this setting enabled and there is at least one respondent who falls into this category. It is possible with either setting to perform scripting before the first interactive node is displayed to the respondent; however if the setting is enabled, the response data will not be stored in the survey database until the first page has been submitted. Surveys with no interactive pages are accommodated and will have the appropriate rows created, and the interview will complete with the appropriate status. When this setting is enabled, respondents who have not yet submitted the first page will not have a “Dropout Question” system variable assigned, so those respondents will not be available for analysis in Reportal. Note that although with this setting enabled the survey will not create database rows until the first page is received, the respid is still considered used by the system so will not be reallocated to any subsequent interview.

Important
If you have a chart in your survey then you should ensure an interactive item is located before the chart, otherwise the chart may display double results.

- **Limited Survey - email invitation** - this requires that a list of respondents, with their email addresses, be uploaded to the survey. You can then set up an e-mailing task via **Respondent > Emailing** (see Handling Respondents in Limited Surveys on page 540 for more information), and each respondent will then be sent a unique link, which includes identification credentials, to the survey. If you choose to run the survey from a secure site, a cryptic link to the survey could for example look as below:

  http://survey.confirmit.com/wix/pXXXXXXX.aspx?r=112&s=VDDNCVPK&l=9 or

  https://survey.confirmit.com/wix/pXXXXXXX.aspx?r=112&s=VDDNCVPK&l=9

  where r = a sequential respondent number assigned by the system.

  s = a randomly generated 8-digit code, uniquely produced for each respondent (giving 26^8 alternatives).

  L = the language in which the respondent receives the survey.

- **Limited Survey with Login Page** - select this option if you wish to create a limited survey with a login page where the respondent enters a user name and a password to participate. This requires that a list of respondents, including the user id and password fields, is uploaded to the survey (see Preparing the Respondent List on page 540 for more information). You can edit the login page and the page texts as required (see Editing the Respondents' Login Page on page 549 for more information).

Note: When sending emails to respondents, do not choose the Include Link option, but paste in the general open link to the survey (see Handling Respondents in Limited Surveys on page 540 for more information).

Note: To prevent unauthorized access, a respondent will be locked out of a survey after 10 failed login attempts. The message "This user cannot be logged on" will then be displayed to the respondent. To allow further login attempts, the project owner or an administrator must reset the counter. To do this, go to the Respondent Data Editor (see The Editor Window on page 550 for more information) and reset the "FailedLoginAttempts" value for that respondent to 0.

- **Enforce entry of username and password after secure survey link timeout -** if enabled, access to the limited survey is more strictly controlled. When enabled, links that are generated have an internal validity period (they expire after a period of time). This period is controlled as a site configuration value (default of 30 minutes). If a link timeout has occurred, the respondent must enter their username and password (userid and password respondent data fields) to participate in the survey. The setting is disabled by default. When enabled, expired emailed survey invitation links will not allow respondents to go directly into the survey, but will additionally require respondents to enter their userid and password. Also, if during the survey the respondent is redirected out of the survey to a different URL and later redirected back, upon redirection back the timeout may have expired and the user will be required to re-authenticate.
- **Require Only User ID...** - this checkbox is active when you select the **Limited survey with login page** option. Check the box to allow the respondent to log in to the survey without having to specify a password.

Note: When the userid is the only authentication mechanism, the surveys will be more vulnerable to unauthorized access; it will be much easier for a prospective intruder to find just a matching userid than a userid/password combination. This mode is therefore not recommended for surveys where it is required that only designated respondents gain access.

- **Limited Survey with External Respondent Creation –** this survey option is only available if the company has an AES encryption key defined. This option is only valid for the Web Survey channel; the other channels do not support this mode. For details regarding the implementation of a solution based on external respondent creation, refer to the External Respondent Functionality white paper that is available from the extranet at https://extranet.confirmit.com. Log in to the Membership Center, go to Resources and filter All Types for White Paper, or search for e.g. External.

Note: Once this option has been selected and the database has been created, the option is set for the database. If the option is later de-selected, then the survey database must be recreated.

- **Single sign on survey** - this option is only available to users who have the Single Sign On (SSO) add-on. The add-on enables respondents who are already logged in to a site "approved" by Confirmit to enter the survey without logging in again (see The Single Sign-on Functionality on page 512 for more information).
- **Professional Panel** - this option is only visible when the user has licensed the Professional Panel functionality. For further information, refer to the Professional Panel User Guide.

17.1.3.2. The Inline Survey Options

The Inline Survey functionality allows you to embed your survey into any web page without having to use iFrames. When you select this option and launch the survey, a script tag is generated and presented on the Survey Overview page (see The General Tab on page 174 for more information), which you can then include on the web page. When you check the Inline Survey box, a panel of options appears.

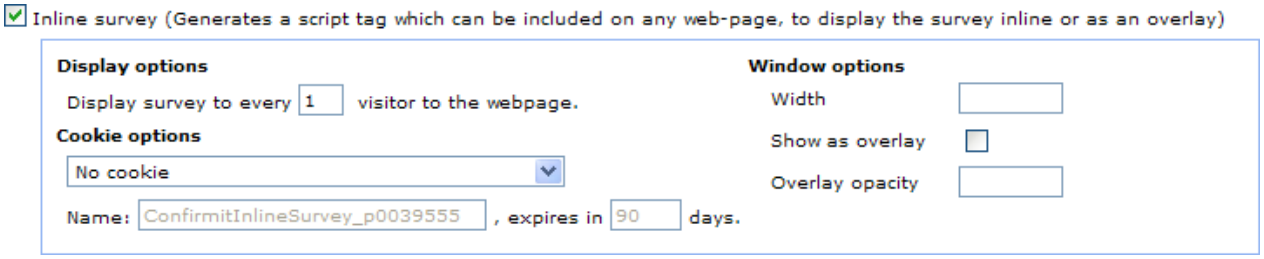


Figure 560 The options that become available when you check the Inline Survey box

The properties and fields are as follows:

- **Display options** - the survey does not have to appear to every person going to the web page - you can set the frequency at which you want the survey to appear. For example, type in 3 to have the survey appear to every third person who enters the web page.
- **Cookie options** - you can add a cookie to the survey that prevents respondents re-entering the survey within a preset time limit. Select the desired option, then set the cookie name and expiry time as appropriate.
    - o **No cookie** - no cookie is added to the survey, so respondents can return to the survey if/when they wish.
    - o **Prevent repeat respondents on same machine** - the cookie is "browser-specific", meaning that when this option is selected the survey cannot be reentered from the same browser on the same pc within the expiry time. The cookie will be set when the respondent reaches the status/end page.
    - o **Remember respondent on same machine** - the respondent data will be remembered such that it can be changed but not entered as data from a "new" respondent.
- **Window options** - type in the desired width and height of the survey window, in pixels.

Note: A limit is imposed on the length of responses for an Inline Survey. An error message is displayed on launch if the survey includes unrestricted open text questions or questions with a field width greater than 2000 characters. Note that for the respondents, IE and some other browsers cannot support 2000 characters.

- **Show as overlay** - check this box if you want the survey window to be displayed as an overlay.
- **Overlay opacity -** when the survey is presented "inline", it is displayed in front of and smaller than the viewer's current web page. In addition the background area surrounding the overlay can be shaded to indicate to the viewer that the survey page is now in focus. Overlay Opacity specifies how opaque the background area around the overlaid question is to be. A setting of 0 gives no shading; a setting of 1 makes the background area dark. Go to the **Designer > Inline Survey Preview** menu item to preview the survey and adjust the opacity using a slider (click **Survey Settings** to close the preview). Save any changes you make while in the preview.

Note: Inline surveys are not intended to be integrated with portals. Problems will occur in the event current responses are deleted and an attempt is then made to open another survey page.

17.1.3.3. Web Site Intercept Overlay Survey

When this Web Options box is checked and the survey is launched, a code snippet is created that you can copy into a web page or web template. The snippet causes a pop-up to appear to a visitor after a preset time, asking the visitor if they would like to participate in a survey. The survey could for example ask for the visitor's opinion on the web page or web site.

Note: The messages and texts presented to the visitor, for example the text in the survey prompt, are set in the Survey Messages (see Survey Messages on page 190 for more information).

To activate and set up the functionality:

1. On the **Survey Management > Survey Settings > Web Options** tab, check the Web Site Intercept Overlay Survey box.

   A box of options is presented.

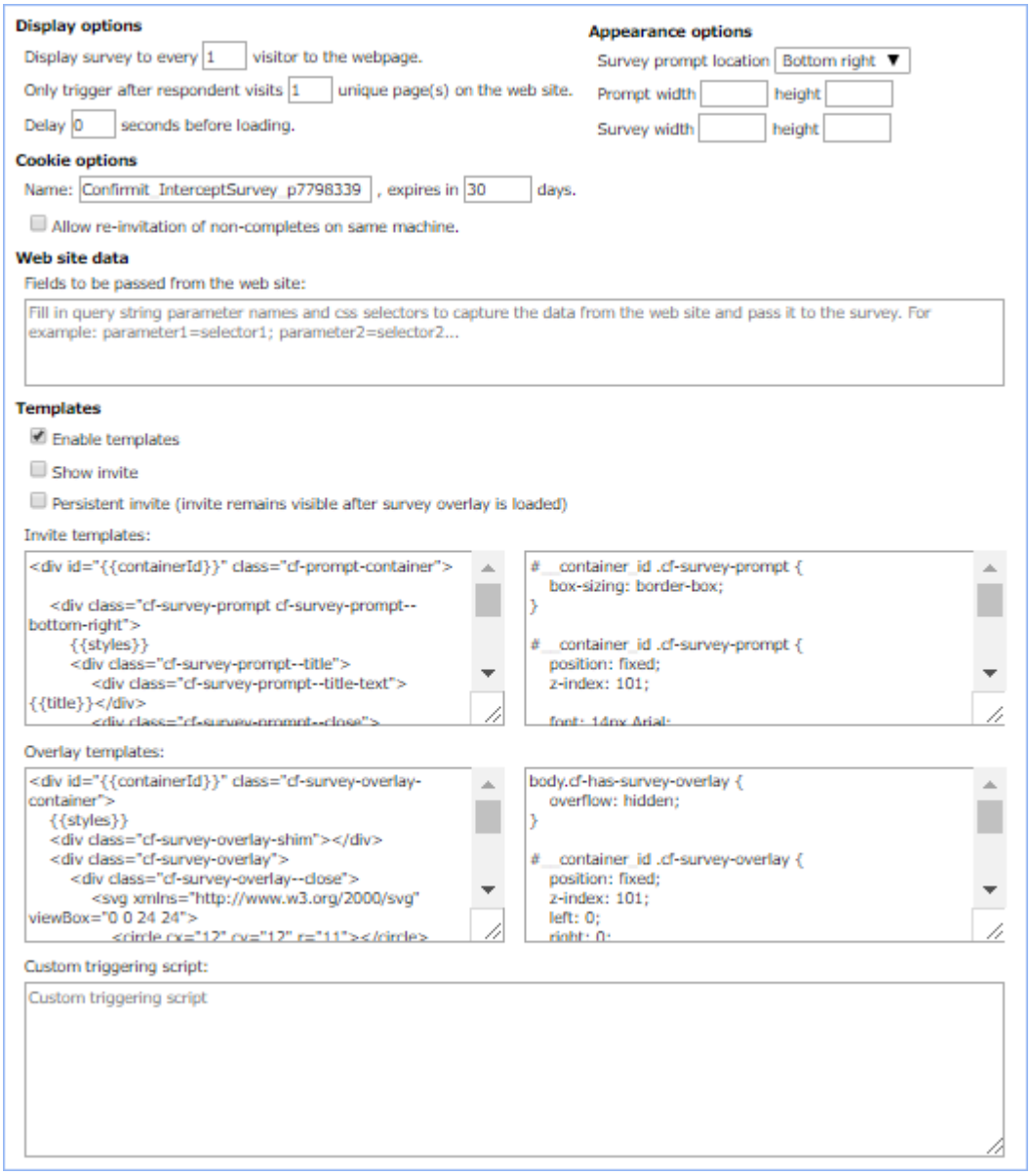


Figure 561 The Web Site Intercept Overlay Survey display options

- **Display survey to every ... -** you do not have to invite everyone who visits your website to take the survey. If you wish to invite for example every third visitor, type 3 into the box.
- **Only trigger after respondent visits ... -** you might not want to be too intrusive - wait until the visitor has viewed a few of your pages before presenting the survey invitation. Type the number of pages “delay” here.
- **Delay -** give the visitor time to see the page and form an opinion before you present him/her with the survey invitation. Type the delay in seconds here.
- **Name -** a cookie will be placed onto the respondent’s pc to ensure he/she is not invited to participate in the survey every time they access your website. Type the name of the cookie and the number of days you want it to remain active here.
- **Allow re-invitation... -** if the visitor doesn’t complete the survey the first time they visit your website, check the box if you want to invite them again the next time they visit. Note that if you have added a number into the "Display survey to..." box (see above) then the visitor will only be invited if they are in the correct position in the sequence of visitors.
- **Web site data -** fields you add here are passed via the querystring to the start of the survey. You can then manually move this data into the survey using a script node. Fill in querystring parameter names and css selectors, for example: parameter1=selector1; parameter2=selector2 etc. to capture the data from the web site and pass it to the survey.
- **Survey prompt location -** select where in the web page you want the prompt to appear.
- **Prompt width/height -** how large do you want the prompt to be; input the dimensions in pixels.
- **Survey width/height -** how large do you want the survey page to be; input the dimensions in pixels.
- **Enable templates -** this functionality can be enabled on request for Professional users. Check the box to open some additional options.

Note: When templates are enabled, any settings made in the above properties will not be used.

- **Show invite -** check if you wish the invitation to the survey to be presented to the potential respondent before the survey opens.
- **Persistent invite -** a key characteristic of a feedback button on a website is that it is permanently available. Check this box if you want the survey initiation button to remain visible even after it has been pressed.
- **Invite templates** - allows you to set up the look and feel for the invitation by editing the HTML and CSS code for the template.
- **Overlay templates** - allows you to set up the look and feel for the survey itself by editing its HTML and CSS code.
- **Custom triggering script** - you can use custom JavaScript code to trigger the survey. Examples of triggering scripts could be: "Nth visitor, N pages visited, N seconds delay", triggering when on a specific page only, triggering on intent to leave the web site, triggering based on clicking a button on the web page, do not trigger after a certain date/time.

2. Make the settings as required.

   On launch, an Intercept survey script is presented towards the bottom of the Launch Survey page and on the Survey Management > Options page General tab.

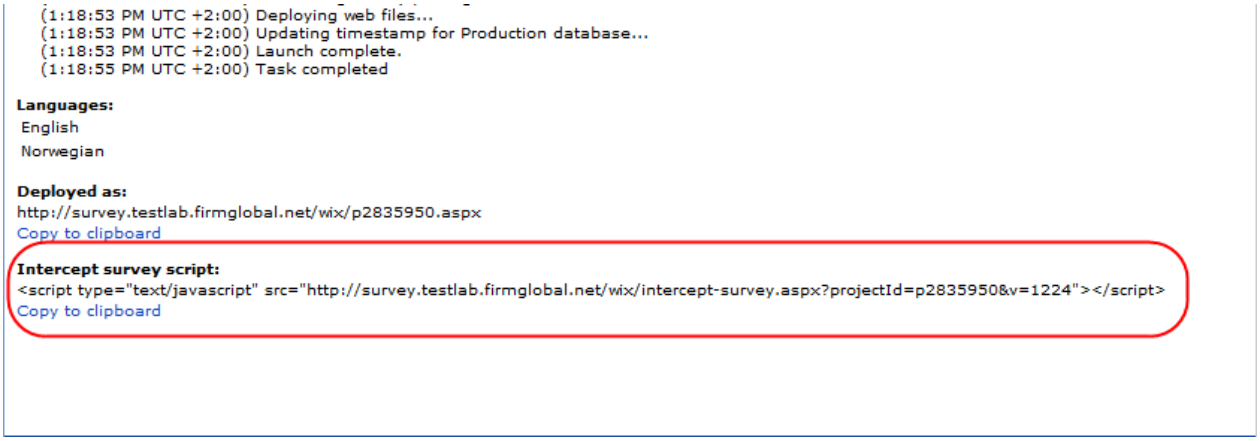


Figure 562 The resulting link on the Launch Survey page

Copy the script to your clipboard then paste it into an email that you can send to your web site manager. The web site manager can then add the script to the website template so the invitation appears to visitors as specified.

17.1.3.4. Pop-up Surveys

You can create surveys that pop-up automatically in a new window when for example someone enters your website.

If you select the Pop-up Survey option in the **Survey Settings > Web Options** tab, then launch the survey in the **Test** database, then the Pop-up Wizard opens (see The Pop-up Script Wizard on page 510 for more information). Here you can set a number of properties for the survey and the window; for example you can define that the pop-up window opens for every alternate visitor, you can set the size of the window and you can set an expiry date. Once you have set up the properties as required, you can copy the activation code from the wizard into the appropriate place in your website. You must then launch the survey in Production mode to create the "finished" survey.

To define a survey as a Pop-up, go to the **Survey Settings > Web Options** tab and check the **Pop-up Survey** box (see The Web Options Tab Properties on page 504 for more information), then save the changes.

17.1.3.4.1. The Pop-up Script Wizard

When you have checked the **Pop-up Survey** box in the **Survey Settings > Web Options** tab, if you then go to the Test database and launch the survey, when the task has completed the task list will include a link for each language selected for the survey.

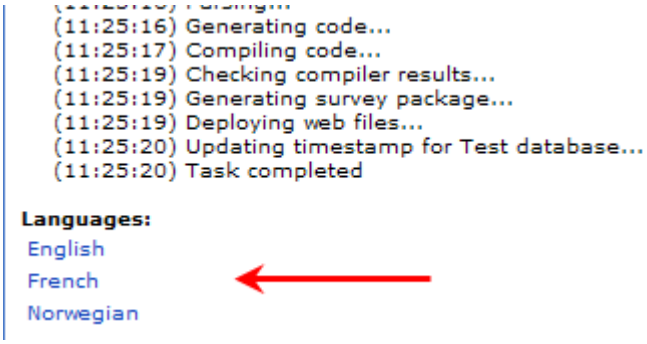


Figure 563 Example of the links resulting from the launch task

Click a link to open the Pop-up Wizard, as shown below, and an example pop-up window with the survey as it will appear to the respondent.

Note: The links open the survey in the example window in the selected language. Settings made in the wizard apply identically to all the languages - you cannot set up the window differently for different languages.

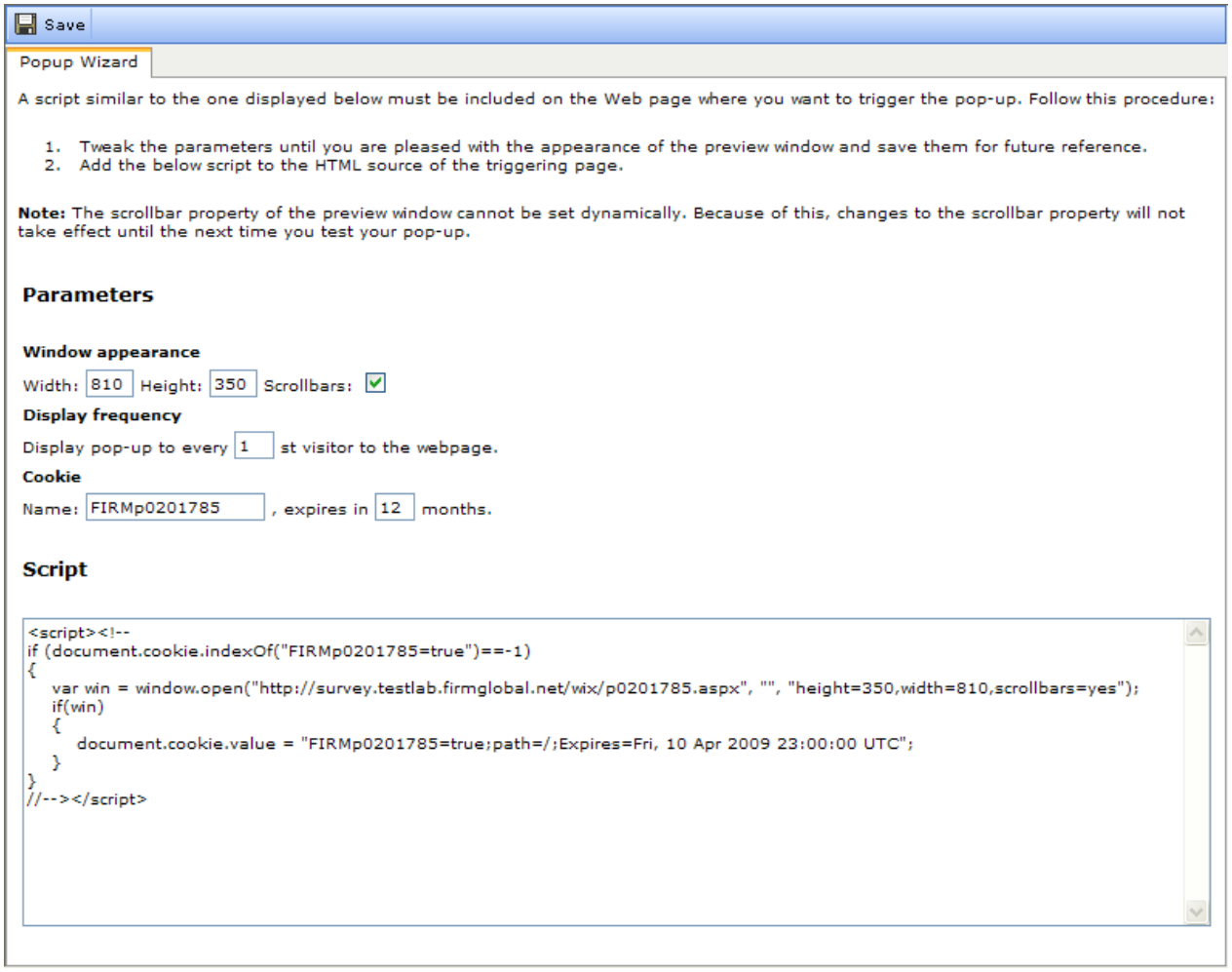


Figure 564 Example of the Pop-up Script Wizard

Use the properties in the Wizard to set up the window as you require. Both the "example" window and the script in the Script field towards the bottom of the Wizard are updated as you make changes to the properties. Once you have the window looking as you wish, save the changes and copy the script from the Wizard to your website.

The script created here is merely an example of a script that will open a pop-up window with the specified settings. You can of course create your own script "manually" to do the job (see An Example of a Script for Pop-up Surveys on page 511 for more information).

Any changes you make to the Pop-up script will be applied to the survey the next time you generate the web interview in the Production mode. Note that you cannot return to the wizard once you more away from it; you must re-launch the survey in the Test mode to re-open the wizard.

17.1.3.4.2. An Example of a Script for Pop-up Surveys

If you wish to create a pop-up survey on a website, you will need to include a script in the code for the page from which you want the pop-up to be opened. There are many different solutions for this depending on how you want the pop-up window to look, when you want it to open etc. Below is an example of a script you could use.

```
<script>
if (document.cookie.indexOf ("FIRMpXXXXXXX=true")==-1
{
 if ( Math.random() < 0.2
 {
document.cookie = "FIRMpXXXXXXX=true;path=/;Expires=Mon, 1 Jan 2001
12:00:00
UTC"window.open("http://www.yourconfirmitserver.com/wix/pXXXXXXX.aspx",
"windowname",
"toolbar=no,location=no,directories=no,status=no,menubar=no,resizable=yes
,copyhistory=no,scrollbars=yes,height=360,width=300")
 }
}
</script>
```

Change **pXXXXXXX** to the actual survey number.

The script first checks if the respondent already has a cookie (in which case he/she already has the pop-up and it should not be opened again).

- **Math.random** gives a random number between 0 and 1. Math.random() < 0.2 will mean that 20% of those who open the web page (for the first time) will get the pop-up.
- **document.cookie** will send a cookie.
- **Expires:** The lifetime of the cookie. Set this to a date some time after the survey is finished.
- **Window**.open opens the pop-up window. Change the URL to the URL of your survey.
- **windowname** may be changed into a name of a specific window if there already is a window opened that you want the pop-up in, or you may use it to refer to the window from other scripts. You may leave this empty ("").

The other parameters control the pop-up window:

- **toolbar=no** - allows the window to have or not have a toolbar.
- **location=no** - allows the window to display its location or not.
- **directories=no** - allows the window to display directory buttons or not.
- **status=no** - allows the window to have a status bar at the bottom or not.
- **menubar=no** - allows the window to display a menu bar or not.
- **resizable=yes** - makes the window resizable, boarders are dragable.
- **copyhistory=no** - allows for tracking of links activates the back or forward buttons.
- **scrollbars=yes** - automatically include scrollbars on the window if needed.
- **height=360** - the height of the window in pixels.
- **width=300** - the width of the window in pixels.

17.1.3.5. The Single Sign-on Functionality

Note: SSO is a company add-on and is subject to payment. If the client company does not have the add-on, then the option will not be available in the Web Options page.

The Single Sign-on (SSO) functionality enables clients to use their own authentication infrastructure when logging on to the Authoring environment, Reportal (designers and report viewers) and limited surveys. If a respondent has already logged on to the system, they will be able to access the survey without the requirement for additional in-logging.

Note: If someone is using SSO to access Reportal, the end user list that is referenced for access MUST have been created by a Professional user who is a member of the same company.

For a client to be able to use SSO, the client must provide Confirmit with a 256-bit AES key for establishment of the trust, and this should be done over a secure file transfer channel. This key will be used when decrypting the tokens that are presented by the users during log-in. The SSO company add-on must also be enabled for the client.

Authentication:

1. SSO authentication is performed by sending a clear-text company identifier ("co") and an encrypted token ("key") via HTTP(S) POST or GET to a Single Sign-on enabled log-in page in Confirmit.

- The "co" parameter should contain the client company id.
- The "key" query parameter should have a value equal to the base 64 encoding of the encrypted value of the string composed of semi-colon delimited key value pairs for id, timestamp, and in some cases destination URL:
    - id – Confirmit user id
    - ts - UTC timestamp of the form "2007-01-10 23:39:39"
    - url - Destination URL

  Sample decrypted "key" value: id=abc123;ts=2007-01-10 23:39:39

2. The value for the "key" parameter must be encrypted by the client using the same 256-bit AES key that was sent to Confirmit previously when enabling SSO. ECB blocking and PKCS5 padding must be utilized.
3. Confirmit will attempt to decrypt the "key" parameter using the key associated with the client identified by the "co" parameter. If this fails, the authentication request will be rejected. Otherwise authentication will be successful as long as the timestamp parameter is not older than a predefined (but configurable) number of seconds. This leeway is used to address lack of systematic clock synchronization across client and Confirmit systems. Every effort should be made to reference a common time source and narrow the timestamp timeout period. After a successful authentication, authorization is performed using the decrypted "id" value.

Surveys:

Generic SSO can be used to access open surveys. If it is, when returning to an already started interview via the use of "__sid__" or "r" and "s", if "co" and "key" are also supplied, the "username" field is updated with the value of "id" from the "key" parameter.

To use Generic SSO when logging on to a limited survey, the survey must be deployed as "Single Sign On survey". This option is selected under **Survey Settings > Web Options > Survey type**, which is available if the user's company has the SSO add-on. Note that SSO requires respondents to be uploaded with a "username" column.

The survey can then be accessed using two different endpoints:

1. Normal survey link: **<deployment server url>/wix/<project id>.aspx**.
2. SSO survey link: **<deployment server url>/wix/sso.aspx**. In this case the Destination URL parameter should be used, and given a value that equals the normal survey link. The user will be redirected to this URL after successful authentication.

The "co" and "key" parameters must of course be included to enable the authentication.

If SSO is used to access an interview, after the respondent is located by "__sid__", the "username" value is matched against the "id" value in the "key" parameter. If the values do not match, the interview does not start.

17.1.3.6. Using Your Own Domain Name for Confirmit Surveys

The question is often asked, "Can we use our own domain name for Confirmit surveys?".

The answer is "Yes, as follows":

A domain name can be pointed towards Confirmit's deployment servers' load-balanced IP address in DNS in order to use a custom domain name instead of the default setting. To do this you will need access to the domain name DNS tools to change the DNS records; most registrars offer online services for setting up domain names. You may also wish to manage your own records on your own DNS server, in which case your network group/administrator should be able to assist you.

To do this, create a record that points to the required site and IP address. A full list of Confirmit IP addresses is published and maintained on the Confirmit Extranet at https://extranet.confirmit.com.

When the domain name is set up and working, you can use it in batch emails or popup scripts on your website to open up surveys. Note that there are some limitations however:

1. If you are using the 'include link in email' checkbox or the ^slink^/^secureslink^ primitives, the default deployment URL in emails will resolve to the default 'http://survey.confirmit.com' or 'http://survey.euro.confirmit.com'. If you wish to change this, contact support to have the domain set on your company level. The ^slink^/^secureslink^ primitives will then use your custom domain instead. If you wish to use a different domain for a specific survey, this can be set on the survey level.
2. Surveys hosted on a different domain should not be deployed over HTTPS as the respondents will then get a warning message stating that the certificate does not match the domain name if they visit a secure link with a custom domain name. As the certificates reside on the load balancers, alternative certificates will have to be set up on a separate IP address in the load balancers. This would be a chargeable service, so contact support if you need to use your own certificate on our servers.

17.1.3.7. Using Your Own Email Address for Survey Invitations

The question is often asked, "Can I use my own email address when sending survey invitation emails to respondents from Confirmit?".

The answer is, "Yes, as follows":

Confirmit has registered its servers that are responsible for sending respondent email invitations, with proper DNS entries. This ensures that emails sent by these servers comply with emailing standards, and delivery reports for invitations are logged within Confirmit for each survey. In order for this to work, the email sender addresses used for sending respondent email invitations must be of the form **<somename>@us.confirmit.com** for our US SaaS environment, or **<somename>@euro.confirmit.com** for our EURO SaaS environment.

If a customer wishes to use their own email address for sending the respondent invitations from Confirmit, this is possible using three different methods:

1. The customer uses their own or a dummy domain name on the email invitations without having set up the necessary DNS records.

   Result: There will be a mismatch between the sender address and the server domain name, so the email will be classified as a spoofed email. This will result in lower deliverability expectations, the possibility of our servers being blacklisted, and the sender domain being reported as a source of unsolicited email. Delivery reports will not be available in Confirmit. **This method must therefore NOT be used.**

2. The customer registers their own domain name or sub-domain for emailing, and configures DNS with Confirmit's servers as 'allowed sender servers' in DNS (usually through an SPF record).

   Result: Delivery rate expectations increase as the email will not be classified as spoofed if the target server performs an SPF check. The domain name can be assigned to the company level in Confirmit and used for all surveys as the default domain, which will enable delivery reports as long as the domain name is used. Using a different sender domain name with this setting active will revert the emailing task back to the previous option, so do not do this.

3. The customer registers their own domain name or sub-domain for emailing, and purchases the Dedicated IP add-on. Confirmit then sets up a dedicated mailing server with its own Internet-facing IP address that is only available for use by the customer through the add-on.

   Result: The server will be separate from Confirmit's other emailing services and will not be subject to the possibility of blacklisting due to other customers' activities on the shared servers. A PTR (reverse) DNS record can be added for the server IP to match the domain name registered for the server. The domain name can be assigned to the company level in Confirmit and used for all surveys as the default domain, which will enable delivery reports. Bounce-backs can also be forwarded to a specific email account. Using a different sender domain name with this setting active will revert the emailing task back to the first option, so do not do this.

17.1.3.8. Bounce Back

A bounce back message is an email that is sent to your account after you have attempted to send a message but that message has not arrived at the recipient or has not been accepted for some reason. This message is generated either by your mail server or the mail server that was the destination of your email. Bounce back messages are to inform you, the email sender, that something has happened to disrupt the delivery of your email. This method of providing an error is standard on all email servers, but the actual text used in the messages can vary.

Hard Bounce

If for example you entered the intended recipient's email address incorrectly and your mail server attempts to deliver the email to another remote server that doesn't handle email for the intended recipient, then you will almost immediately receive a bounce back error. A hard bounce can often be a permanent problem, as it is essentially the remote mail server telling you that because the user you tried to email doesn't exist on their server, it's probably not going to start working any time soon.

A hard email bounce back can also occur when multiple email servers within a company or ISP infrastructure are responsible for the delivery of email; an initial mail server can accept the email for delivery but the actual receiving mail server then rejects the email. Previously, as the initial server had accepted the email, Confirmit would interpret this to mean the email had been delivered. Now however, additional processing means the SMTP status within Confirmit is updated to indicate the email was actually not delivered. This will therefore give a more accurate response rate.

17.1.4. The CAPI/Kiosk Options Tab

Note: CAPI/Kiosk is a chargeable add-on, and this tab will only be visible if your company has licensed the add-on. If your company has licensed the CAPI/Kiosk add-on, then you can download User Guides for this functionality from the Confirmit Extranet at https://extranet.confirmit.com. Note that you will need a Confirmit Extranet username and password to access the user guides. Refer to these guides for further information.

The options on the CAPI/Kiosk Options tab only become active when the **CAPI/Kiosk Survey** option is selected in the Survey Channels tab.

Note: When you launch a survey in CAPI mode (you have checked the CAPI/Kiosk Survey box in the Launch Survey window) you will automatically be given the "Supervise CAPI Project" permission for that survey (see Permissions on page 185 for more information).

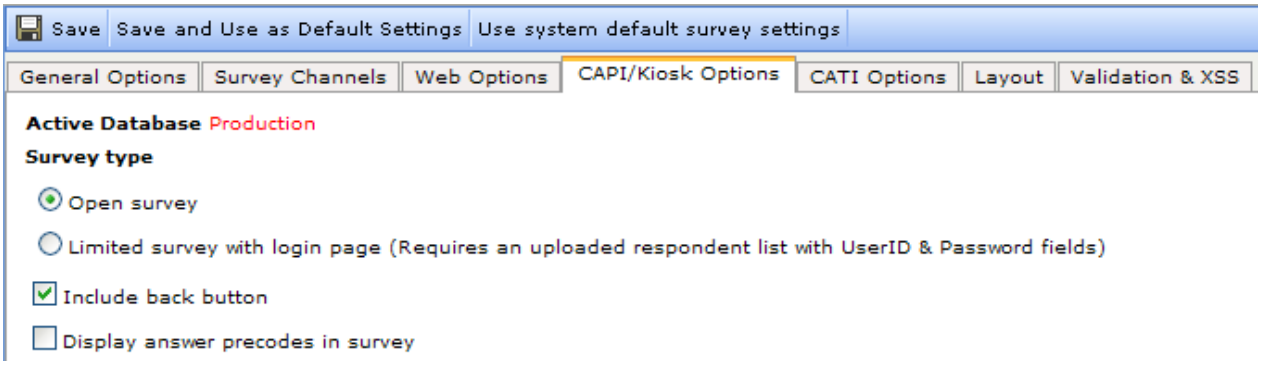


Figure 565 The CAPI/Kiosk Options tab

The options are as follows:

- **Open survey** - the survey will be available to anyone using the pc. This option could be used for example for a customer satisfaction survey in a hotel foyer.
- **Limited survey** - the respondent must log in using a UserID and password.
- **Include Back button** - adds a **Back** button to each page of the survey so respondents can go back to previous pages and change their answers.
- **Display answer codes in survey** - check to include the codes beside the answer labels on the question pages in the survey.

The following functionality is not currently supported:

- The Dynamic Survey Layout functionality is not supported in the CAPI/Kiosk console. Surveys that include dynamic layout can be run on a CAPI/Kiosk console, but without the dynamic functionality.

- No animation is available for Ranking questions (rank by click).
- Table lookup / hierarchy lookup.
- Star rating questions.
- Grid bars.

In addition, you must ensure that images referenced in CAPI surveys are stored in the correct location (see Files in CAPI Surveys on page 172 for more information).

17.1.5. The CATI Options Tab

Note: CATI is a chargeable add-on, and this tab will only be visible if your company has licensed the add-on. If your company has licensed the CATI add-on, then a User Guide for this functionality is available. Refer to this guide for further information.

If you check the **CATI Survey** box on the Survey Channels tab, then the properties on the CATI Options tab become active.

Note: When you launch a survey in CATI mode (you have checked the CATI Survey box in the Launch Survey window) you will automatically be given the "Supervise CATI Project" permission for that survey (see Permissions on page 185 for more information).

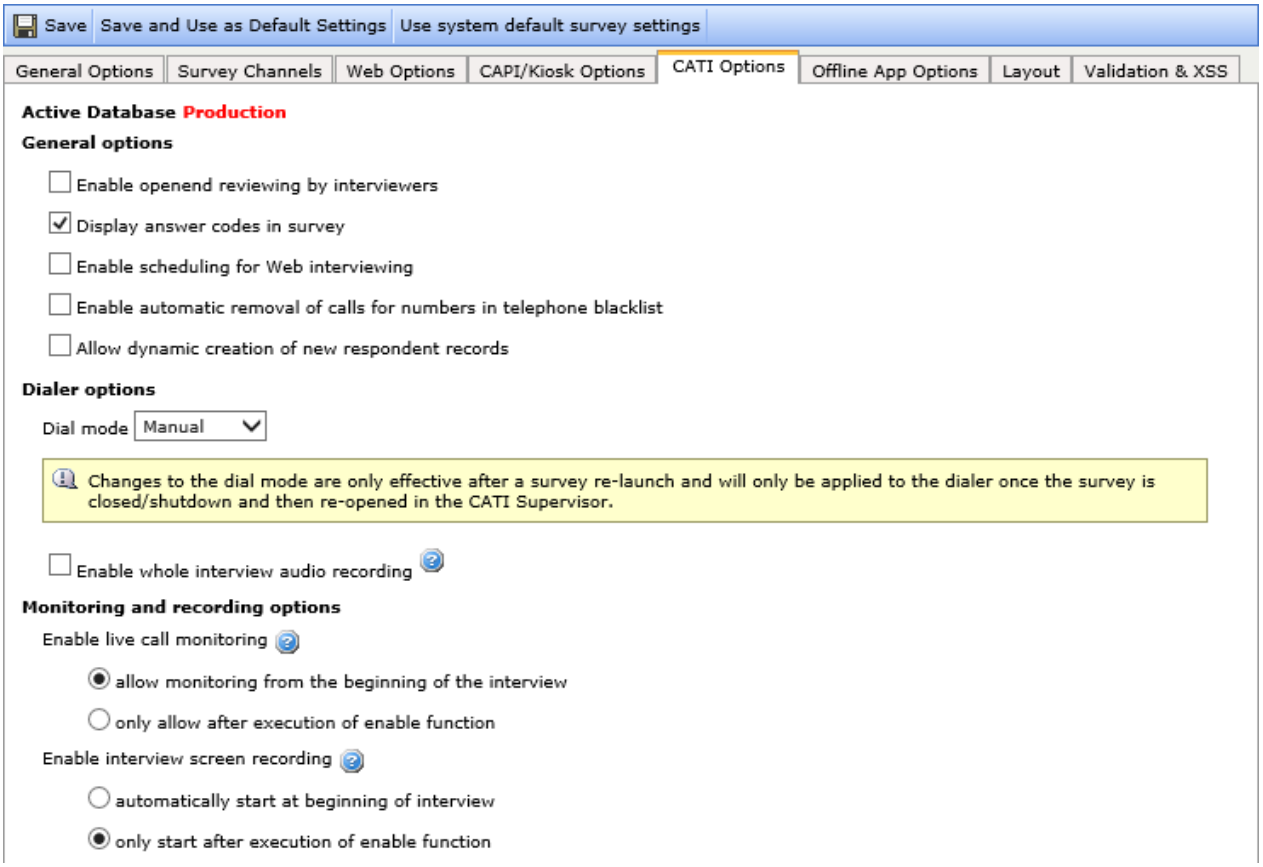


Figure 566 The Survey Settings > CATI Options tab

The options in this tab are as follows:

- **Enable open-end reviewing by interviewers** - when a survey contains Open Text fields, after the interview is completed the interviewer may need to go back through the questions and review/edit the text he/she has written. When this box is checked, all Open Text fields in the survey will be made available on the interviewer's display after the interview is completed.
- **Display answer codes in survey** - CATI interviewing supports the use of the keyboard for selecting answer options. Check this box if you wish the interviewers to be able to see the codes. The interviewer can then type the code value or text into the field and press **Enter** to "select" the answer option.
- **Enable scheduling for Web interviewing** - if this box is checked, if a web interview finishes with a predefined status then the CATI scheduling rules will be invoked. Typical scenarios where this may be invoked are as follows:
    - A Multimode interview that is started in CATI but completed via Web because when the email is sent to the respondent during the CATI interview an appointment is created for some point in the future (for example 1 week). If the respondent later completes the survey via the Web, the appointment is removed. If they do not complete it then the appointment will remain valid and will need to be followed up by the interviewer.
    - A Web survey that has an option to have an interviewer call the respondent back. After the respondent requests this, the system will create a call for that respondent in its call queue. This is done via the scheduling rules.
- **Enable automatic removal of calls for numbers in telephone blacklist** - when this is enabled, all telephone numbers contained in the sample are checked against the blacklist. When a blacklisted number is found, the call corresponding to this number is deleted from the schedule and the call is assigned the “Blacklisted” extended status. When this option is disabled, telephone numbers from the sample are NOT checked against the blacklist. Note that when this option is disabled, any previously blacklisted numbers for which calls had been deleted are retained in the “Blacklisted” status until the supervisor changes the status manually.
- **Allow dynamic creation of new respondent records** - activates the Create New Interview button on the CATI console. This button then allows the CATI supervisor to create a new interview for the current survey when there is no preloaded sample record available. It also allows new interview records to be created automatically when using inbound call routing, in situations where the caller cannot be identified against the existing sample contacts.
- **Dial mode** - this is the method used to dial the telephone numbers. The mode selected will depend on the dialing system used by the call canter that will be using the survey. The options are:
    - **Manual** - the interviewer is allocated a telephone number by the CATI system, and manually dials the number on his/her telephone.
    - **Preview** - the CATI system presents the telephone number on the interviewer's display, and the interviewer clicks, for example, "OK" when he/she is ready to start the interview. The CATI system then dials the number and connects the line to the interviewer's telephone.
    - **Automatic** - the CATI system dials the next number in its sample list automatically as soon as it registers that the interviewer is finished with the previous interview.
    - **Predictive** - when the dialer dials a telephone number, in a large proportion of cases the line may be engaged, the prospective respondent may not answer the phone, the number may be a fax machine etc. If the dialer were to dial a number and wait for a reply before trying the next, a lot of time will be wasted. The dialer will therefore dial several numbers simultaneously and pass the first answered line to the first available interviewer. This can increase productivity for the call center, but can result in a lot of prospective respondents receiving "nuisance calls" - where their phone rings, they answer it but there is no-one on the other end. Careful adjustment of the dialing system is therefore necessary to keep the percentage of nuisance calls to a minimum. A large number of dialing systems are available on the market. For further information on the dialer your CATI system is using, refer to the technical information provided by your dialer supplier or the internal team responsible for your CATI/dialer infrastructure.

Note: Changes to the Dial mode are only effective after the survey is re-launched, and will only be applied to the dialer once the survey is closed/shutdown and then re-opened in the CATI Supervisor.

- **Enable whole interview audio recording**- if a dialer is used for the call, when this setting is enabled the audio for all interviews carried out in this survey will be recorded and available for playback from the call management dialog. If screen recording is also enabled, the interviews can be replayed with both screen and voice from the 'Recorded Interviews' tab in the CATI supervisor.
- **Enable live call monitoring -** This setting makes it possible to allow or deny a supervisor access to live call monitoring functionality. Live call monitoring means that the supervisor can start monitoring an interviewer while the interview is being conducted. A monitor window will open which mirrors the screen activity of the interviewers console application. If an integrated dialer is being used then it may also be possible for the supervisor to listen to the audio of the live call. A monitoring session is started by clicking on the button to start monitoring from within the 'Interviewers List' (available under 'Activity Views' in the CATI Supervisor UI). Note that to be able to use monitoring functionality, the monitoring application must first be installed on the machine used to perform monitoring.
    - **Allow monitoring from the beginning of the interview -** allows the supervisor to start monitoring on any call and at any point during the course of the interview.
    - **Only allow after execution of enable function -** only allows the supervisor to monitor calls that have the ability to monitor enabled by the survey script function **EnableLiveMonitoring()**. Note that live call monitoring will only become possible after the point in the survey where this script function has been executed.
- **Enable interview screen recording** - (default - not selected) This setting makes it possible to enable or disable screen recording (video capture of the interviewers application screen).
    - **Automatically start at beginning of interview -** screen recording will automatically start at the beginning of each interview.
    - **Only start after execution of enable function -** screen recording will only start for interviews where the survey script function **StartScreenRecording()** has been executed (recording will start from the point at which the function is executed). Note that to be able to play recordings, the monitoring application must first be installed on the machine used to perform video playback.

(see CATI on page 648 for more information).

17.1.6. The Offline App Options Tab

This is where you set up the options available for the Offline App. Note that this tab is only available if your company has licensed the Offline App add-on and the setting has been selected in the Survey Channels tab.

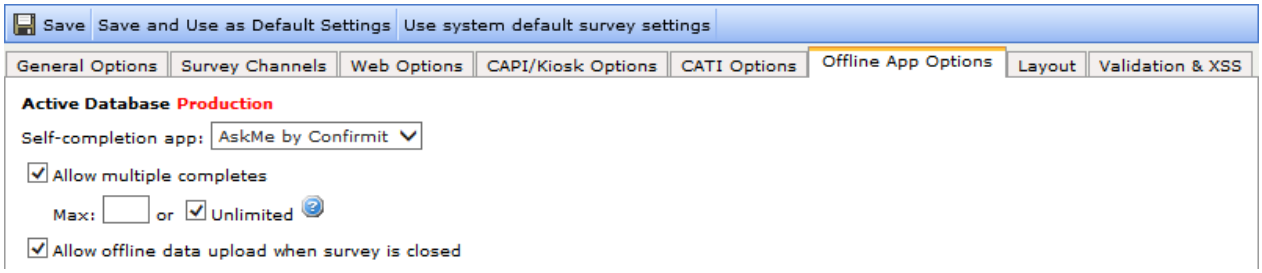


Figure 567 The Survey Settings > Offline App Options tab

- **Self-completion app -** the name of the self-completion app you wish to use for this survey. The default will be AskMe by Confirmit. If your company has licensed your own version of the app, with for example your company name and logo in the smart app banner, then this will be an additional option here. Select the app you wish to use.
- **Allow multiple completes -** you may want your respondents to be able to complete the survey several times, for example if the survey is to be re-run each day for a number of days. Both open links and personalized links can allow for multiple survey completions. When personalized links are used, any respondent data is duplicated for every completed interview.
    - **Max -** here you type in the maximum number of times a respondent can complete the survey per respondent link.

- **Unlimited -** a respondent can complete the survey any number of times.

- **Allow offline data upload... -** when respondents use the AskMe app the survey is downloaded to their mobile device and saved for them to complete at their leisure. It is entirely possible that by the time the respondent has completed the survey and the mobile device is back online and ready to upload the data, that the survey has already been closed. In this event, you can instruct the survey to add the data to the database anyway, giving you an additional set of data, or you can instruct it to ignore the data being uploaded. The data is then quietly deleted so the participant will never know that their data was not used. Check or uncheck the box as required.

17.1.7. The Layout Tab

Use the options in the Layout tab to choose the look and feel of the survey.

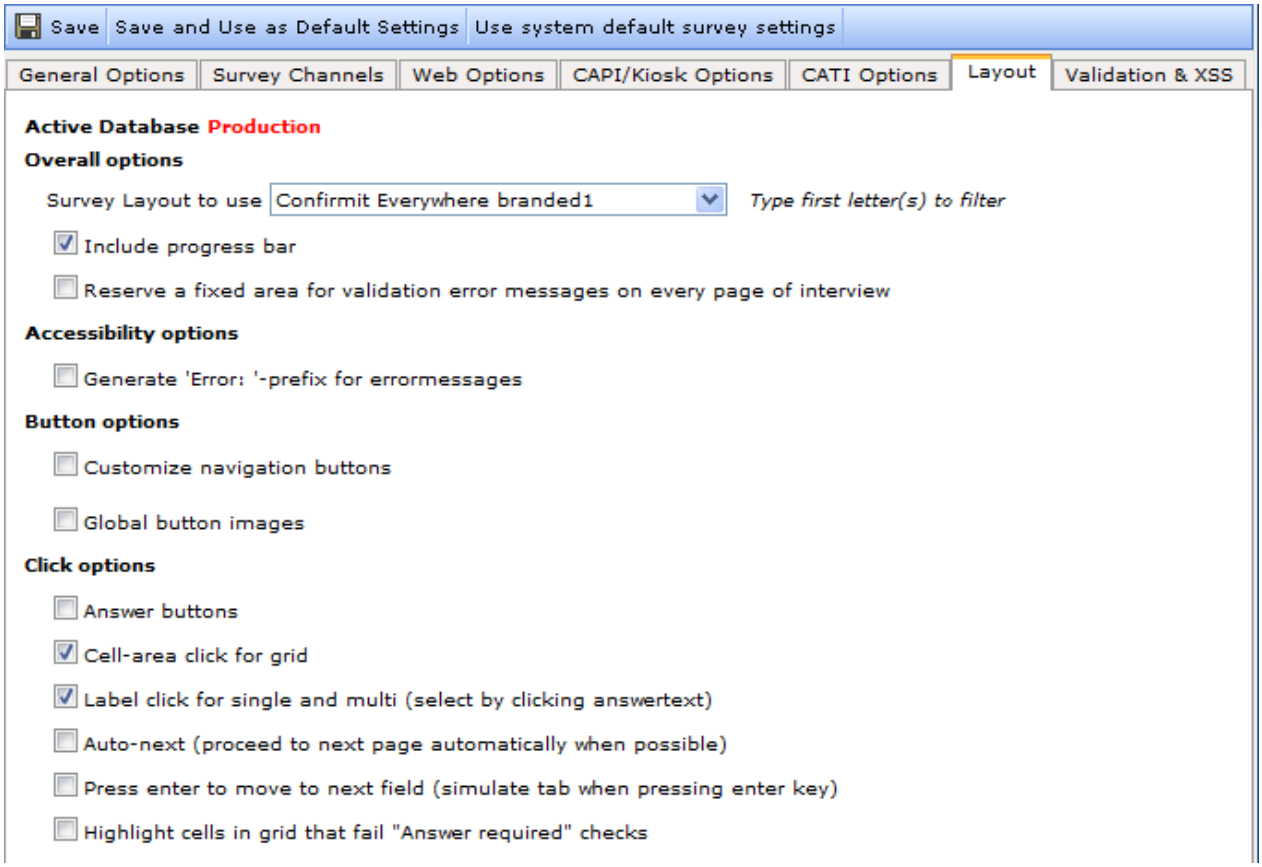


Figure 568 The Survey Settings > Layout tab options

17.1.7.1. The Layout Tab Properties

17.1.7.1.1. Survey Layout to Use

Click the down-arrow beside the field to open a drop-down list of the Survey Layouts available, and select a layout from the list to apply it to your survey. The Survey Layouts comply with web accessibility requirements.

Read more: http://www.access-board.gov/sec508/508standards.htm, http://www.w3.org/WAI, http://www.w3.org/TR/WCAG10/

Note: Easy layouts have some restrictions regarding changing the layout/design. If you are using an Easy Layout and you find that some setup options are not available, try changing to a Public layout.

17.1.7.1.2. Panelist Template to Use

Visible when the survey you are working on is a basic panel. Click the down-arrow beside the field to open a drop-down list of the templates available, and select one from the list to apply it to your panel. Note that you can select none (blank - default). If no template is selected, the legacy portal that might have been deployed, will be deleted during survey launch.

17.1.7.1.3. Include Progress Bar

This option instructs the generator to include a progress bar on the interview pages. This bar shows the respondent how much of the questionnaire is remaining (as a percentage). The percentage calculation is based on the entire questionnaire, i.e. all questions in the survey. This means that if you have conditions in the questionnaire, the progress bar will jump depending on the number of questions that were bypassed due to the previous answer given by the respondent. The progress bar can therefore sometimes be misleading to respondents.

17.1.7.1.4. Reserve a Fixed Area for Validation Error Messages on Every Page of Interview

Select this option if you wish to reserve a small fixed area for page error messages. This prevents the rest of the page from jumping up and down if the interview program displays an error message. Because this area consumes space, you may wish to uncheck this option, especially if you are creating a pop-up survey where the window size is limited.

17.1.7.1.5. Generate 'Error:' Prefix for Error Messages

When you have chosen a Survey Layout for your survey, the survey will be compliant with the web accessibility requirements. The only requirements that are not covered by Survey Layouts are including a prefix “Error” in front of the error messages and Insert label for ‘Other’ inputs. In this field you can activate the Generate ‘Error’ prefix for error messages, which means that the word “Error” will appear in front of all system error messages.

17.1.7.1.6. Customize Navigation Buttons

This feature allows you to control the look and feel of the **Next** and **Back** buttons in the survey. You can set the style attribute for the button or image, and thereby set color, borders, text color, position etc. in HTML. You can choose to use either buttons or images for navigation.

- If you select **Button** from the Type drop-down, you can enter into the text boxes the texts that you wish to be used in the buttons.
- If you select **Image** from the Type drop-down, you can enter into the text boxes the URLs to the image files that you wish to use.
- You can set different URLs/texts for each language.
- In the Style field you can enter HTML code to format the text and background of the **Back**, **Next**, and **OK** buttons, for example:

```
background-color:#e2e2e2;color:black;font-size:10px
```

For additional information, see:
http://www.msdn.microsoft.com/library/default.asp?url=/workshop/author/dhtml/reference/objects/input_submit.asp

If no URLs/texts are specified, Confirmit will create some defaults if the *Customize navigation buttons* option is selected.

Note: The texts presented in the Back and Forward buttons can be edited/translated in the Survey Messages (see Survey Messages on page 190 for more information).

17.1.7.1.7. Global button images

You can use images instead of the standard radio buttons and/or checkboxes in your questionnaire. The Global Button Images feature enables you to specify up to three image URLs such that the images will replace the radio buttons and/or checkboxes in the questionnaire under the appropriate conditions. The images defined here will be applied for all instances in the questionnaire, of radio buttons and/or checkboxes as specified, unless other images or "no images" are defined for specific questions. To define other or no images for specific questions, go to the Advanced WI Features tab for that specific question (see The Advanced WI Features Tab on page 258 for more information).

1. Check the box to open additional input fields as shown below.

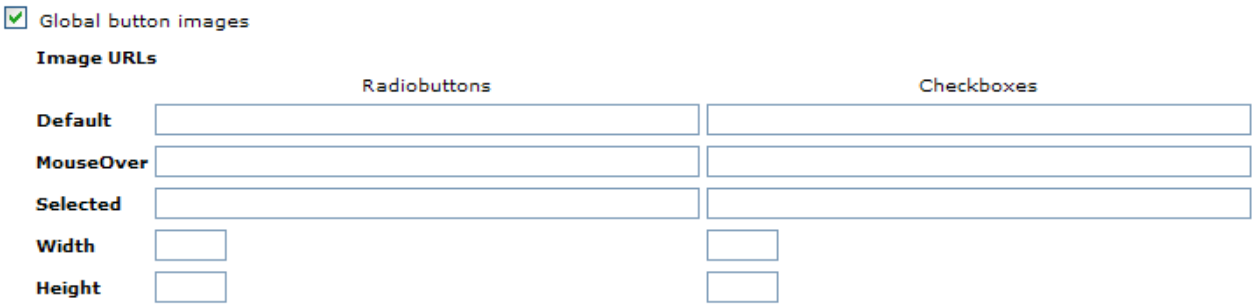


Figure 569 The Global Button Images input fields

2. Type or copy into the appropriate fields, the URLs and file names of the image files you wish to be used for the various instances.

   You can define up to three different images for radio buttons and checkboxes;

   - **Default** - the "standard" image that will be used while the respondent has not placed the mouse onto the image area or selected the answer option.
   - **MouseOver** - the image that will be displayed when the respondent moves the mouse pointer over the area of the image.
   - **Selected** - the image that will be displayed when the respondent has clicked onto the image area.

Note: To ensure the images are displayed correctly, the image files should be stored in the file library (see File Library on page 157 for more information).

3. Specify the width and height, in pixels, with which the images are to be displayed.
4. Save the changes.

17.1.7.1.8. Answer Buttons

Check this option to replace all radio buttons and checkboxes in the survey with buttons.The button layout can be customized in the Question Form Input properties pane (see Visual Components for Question Skins on page 87 for more information).

Note: When using Answer buttons, Capture Order is not supported (see The General Tab on page 251 for more information).

17.1.7.1.9. Cell – area Click for Grid

In grids and 3D-grids, this feature allows the respondent to click in the cell area around the radio button instead of having to click exactly on the radio button itself. This simplifies the selection act for the respondent as he/she does not have to be so accurate with the mouse pointer.

The general background color of the cells is defined by the Background > Color attribute in the html style selected for the Grid Table Style property (right-click on the selected Grid Table Style and select Edit this HTML Style).

When the respondent selects an option, an image can be presented in the cell (see Global button images on page 520 for more information) or the color of the "selected" cell can be changed (see Set Color for Selected Cell on page 522 for more information) so that the selected option is clearly visible.

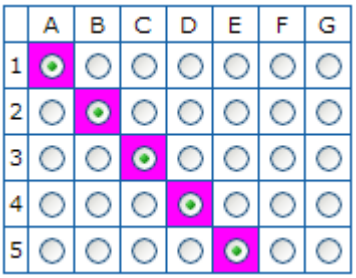


Figure 570 The selected cells can be given a contrasting color so they are easily distinguishable

If the *Button images* feature has been set for the question, then the image will override the selected color.

Set Color for Selected Cell

When the respondent selects an option in a grid, the color of the "selected" cell can be changed so that the selected option is clearly visible. Note that the selected color will apply for all grids in the questionnaire that are using the selected question skin. To set the color to be used for a grid cell once it has been selected by the respondent:

1. In the grid question's Preview tab, click **Edit the Question Skin**.

   The question skin's Page Editor opens.

2. Double-click on the Question Form Inputs item to open its Properties page, then go to the Grid tab.
3. In the Grid Cell Click Color property, double-click on the color example area to open the selection chart then select a color, or type the required color code into the field.
4. Click **Apply** or **Apply and Close** as appropriate to save the property changes, then save the changes to the Question Skin.

To view the effects of your changes, go to the grid question in the Questionnaire Tree and click the Preview tab in the Page Editor.

Note: If the *Global Button Images* property has been defined for the survey (on the Survey Settings > Layout tab) (see Global button images on page 520 for more information), but you wish to use the "selected" color for a particular grid, an additional step in the process may be required depending on the type of grid you are working with.
For a 3d-grid, the Global Button Image setting will override the "selected" color, so you must go to the 3d-grid's Properties page > Advanced WI Features tab and set the Button Images property to No Images.
For a normal grid, the "selected" color will override the Global Button Image setting, so no additional action is necessary.

17.1.7.1.10. Label Click for Single and Multi (Select by Clicking Answer Text)

This feature will enable the respondent to click the labels as well as the actual checkboxes/radio buttons for single and multi questions, thereby increasing the clickable areas and making the survey easier to answer.

17.1.7.1.11. Auto-next (Proceed to Next Page Automatically When Possible)

This feature will automatically take the respondent to the next page in a survey when all the questions on a page have been completed. The feature will only be applied on pages consisting of single questions (a grid is a collection of single questions, so the feature will be active for grid questions).

17.1.7.1.12. Press Enter to Move to Next Field

Check this box to allow the respondent to use the **Enter** key on his/her keyboard to move to the next field - simulating the **Tab** key.

17.1.7.1.13. Highlight Cells in Grid...

Check this box if you want to highlight the cells in a grid question that fail the "Answer required" checks. This will simplify the survey for the respondent as, if he/she attempts to proceed to the next question before having selected the required number of cells in the grid, when the error message is presented any cells that have not been answered will be immediately visible to them (see How to Highlight Error Cells on page 296 for more information).

Note that this also applies if an Other option is selected by the respondent but they do not enter any text into the Other field.

17.1.8. The Validation & XSS Tab

Use the Validation & XSS tab options to specify the checks that are to be made on the respondents' answers before they are allowed to move on to the next question.

You can also add "global" validation code which will be executed for every question in the survey. The code specified here will be executed when each question in the survey is submitted, so the code should be as efficient as possible. The code will be executed before any custom question validation that may be defined. The CurrentForm() function can be used to provide the question ID of the current question, and the getType() method can be used to filter the question types and specify which types the code is executed on.

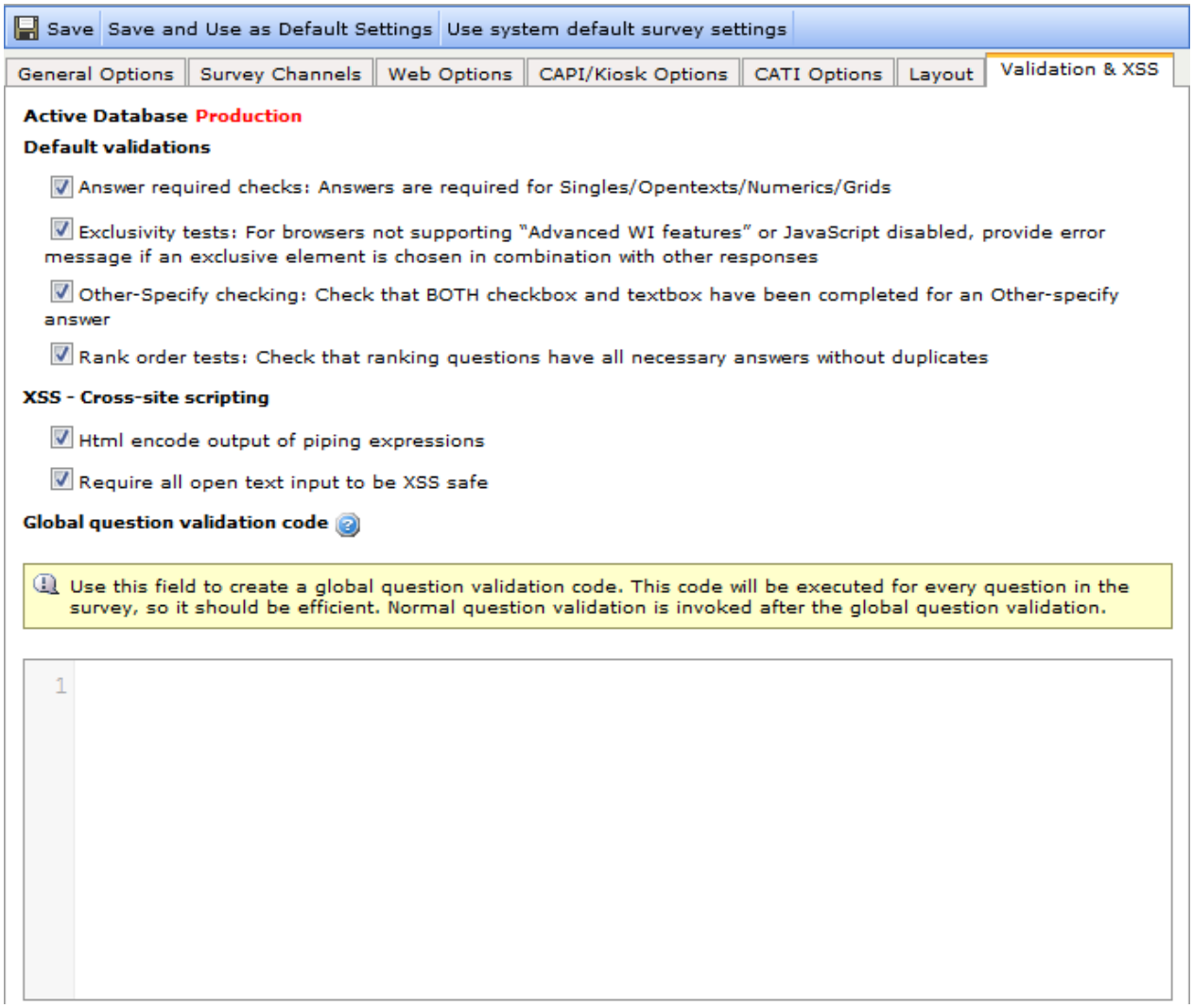


Figure 571 The Survey Settings > Validation & XSS tab options

17.1.8.1. The Validation and XSS Tab Properties

The Default Validations options allow you to define the checks that are to be performed on the answers given on a page before the respondent is allowed to proceed to the next page.

The XSS settings safe-guard Confirmit against cross-site scripting (XSS). Cross-site scripting refers to when users are inserting scripts in user input fields (for example an open text question in a questionnaire) that could potentially be executed elsewhere in an application. Note that Confirmit does not enable such scripts to execute anywhere inside the application. However, as some users wish to use, for example, HTML code in response piping when presenting input to respondents in surveys, users may choose to enable it in interviews.

Answer Required Checks

The generator produces code that ensures that the respondent answers a question unless it has the “Not required” property set. This option applies to all Open, Single and Grid questions, and Multi questions with an exclusive answer alternative defined as single punch.

Exclusivity Tests

The generator produces code that ensures that the respondent cannot select an "exclusive" answer alternative in a Multi question in addition to other answer alternatives in the list. For browsers not supporting “Advanced WI features” or that have JavaScript disabled, an error message is provided if an exclusive element is chosen in combination with other responses.

Other-Specify Testing

The generator produces code that confirms the consistency of user input, i.e. that the respondent both checks off for "Other" and writes in the text box.

Rank Order Tests

The generator produces code that ensures that the inputs in Multi Ranked questions and Grid questions are unique for each alternative in the list, and consecutive. The questions must be marked as Ranked in the questions' Properties sheet (see Question Properties on page 251 for more information).

HTML Encode Output of Piping Expressions

Check this box to encode expressions in response piping so the code is not executed.

Note: A site-wide setting is available, called HTMLEncoding, which can be set by the system administrator. This setting, when selected, overrides the HTML Encode Output... checkbox setting and will cause piping expressions to be encoded irrespective of the HTML Encode Output... checkbox setting.

Require all Open Text Input to be XSS Safe

The generator validates the input from the respondents and will not accept input containing < and >.

17.1.9. How to Create Default Survey Settings Templates

Default Survey Settings templates can be created for the site, at the company level, or for individual users. Then for example, if the same settings are used for all surveys created by your company, you will not have to go in and set them up for every survey.

It is possible to have one site-wide template, one company template, and one user template per user. Once a template exists, the **Use default survey settings** button becomes available in the Survey Settings page toolbar - click the button to use the template. By default, the User Settings template will be used if one exists, otherwise the Company or Site-wide template will be used in that order of priority.

You can specify if you want to use your personal survey settings (user template) on the survey wizard page when you are creating the survey.

The Survey Settings Template page contains the same tabs and properties as the "standard" Survey Settings page inside a survey. Note that if a survey is based on a survey template then no survey settings template is applied.

The settings in a survey settings template are applied to a survey when the survey is first created. The template is not linked to the survey, so once the survey exists, the template settings can be changed and the survey will not be affected. Survey settings templates do not apply to Basic panels.

To create a Survey Settings template:

- **Site-wide template -** Log in as Administrator and go to **Admin > Default Survey Settings**.
- **Company template -** Log in as a user with the Company_Administrate permission and go to the **Home > Company Settings > Default Survey Settings** menu command.
- **User template -** Log in as a normal user and go to the **Home > User > Default Survey Settings** menu command.

1. In all cases, the Default Survey Settings page opens.
2. Make the settings as appropriate (see Survey Settings on page 492 for more information).
3. Save the changes.

To delete your Default Survey Settings template, go to the **Home > User > Default Survey Settings** menu item and click the **Delete Survey Settings Template** button.

17.2. Generating the Response Databases - Launching

When you have finished constructing your survey and you want to test it, you must first prepare a response database. This process is called compilation. Note that every time you make changes in the survey, you must update the database.

Note: The system maintains two separate databases for your survey; one test database, and one production database. These databases must be compiled separately. To switch between databases, either for general use or for compiling, use the Database drop-down in the lower right corner of the window.

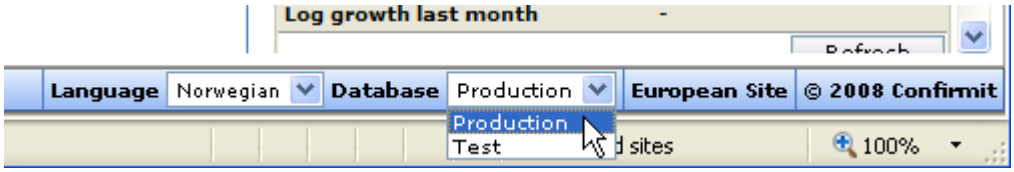


Figure 572 The global database switch

1. To generate the databases for a survey, go to the **Designer > Launch Survey** menu command.

   The options page opens.

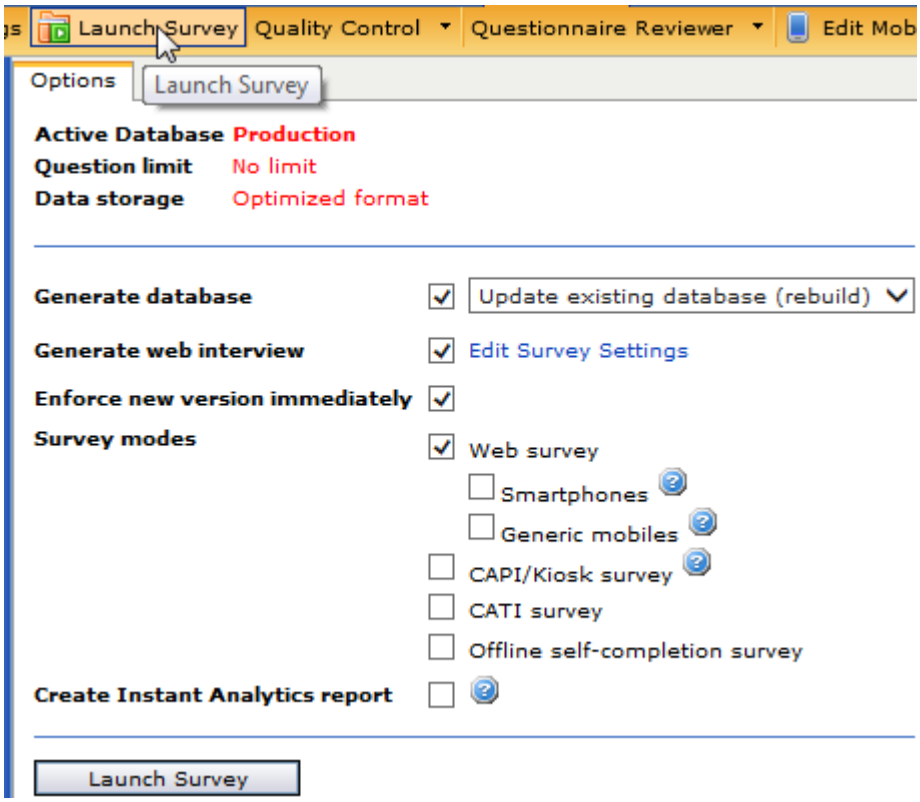


Figure 573 Launching a survey

Note: CATI and CAPI are both add-ons and subject to payment. The options will only be available in the tab if your company has purchased the appropriate licenses. In the event you are creating a CATI interview (refer to the CATI Supervisor's Manual for further details), then the Generate Web Interview option is not available; it is selected by default and cannot be deselected.

The active database (in this case Production) and the data storage format are indicated towards the top of the page.

Note: The Test database has an additional option - Enable External Test. When selected, this allows external access to the Test database to perform test interviews (see Enabling External Test Access on page 530 for more information).

2. Select whether you wish to generate the database and/or the web interview files.

   In the Generate Database drop-down, if the database does not yet exist then "Create initial database" is the only option available. If the database has been generated previously then other options are available. If you wish to generate the database:

3. Click the down-arrow beside the field to open a drop-down list of the generation options available, and select the desired option. The options in the drop-down are:

   - **Update existing database (rebuild) –** the system will update the entire database. You would for example use "rebuild" on your surveys after a system upgrade, after some bug fixing has been carried out, or if new languages have been added to the survey.

   - **Create new database –** the system will create a completely new database. All existing data will be deleted. If you select this option, a warning message, shown below, will be displayed.

WARNING:
Recreating the database will delete all data in the database. NEVER do this in a running production database.

o **Create new database (optimized format) -** this option is only available for surveys that have previously been launched in the Legacy format. Select this option if you wish to convert the database to Optimized format. Note that any existing data will be deleted.

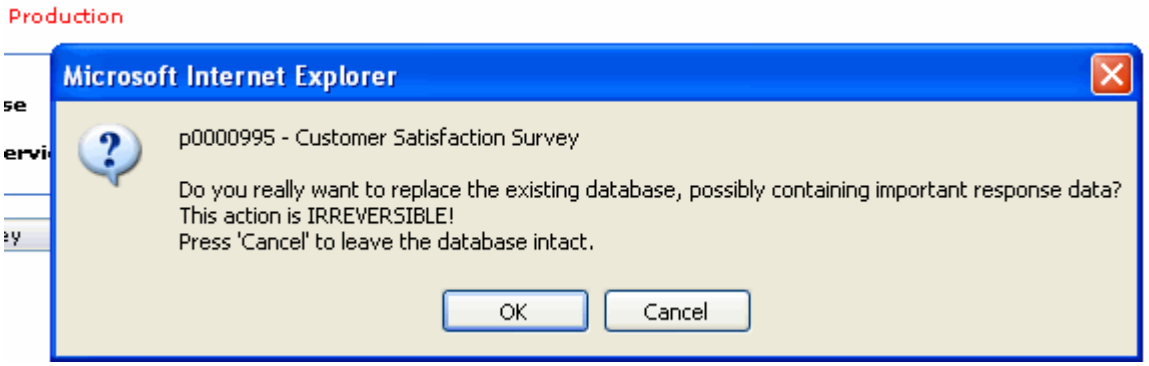


Figure 574 The Create New Database warning message

Important
For surveys created in the Optimized format, before you launch the survey for the first time and thereby create the database, you can change the type of database that is to be used. However once you have launched the survey and the database exists you can no longer change the type.
For surveys created in Legacy format and using a survey layout, whenever you launch the survey you can select to change the database format to Optimized. Note that once the database is in the Optimized format it cannot be changed back to Legacy again.

When launching a survey and updating an existing database, the database may be locked for a short period as it is updated. If a respondent is in the survey at the time, the survey will be closed and a message will be presented to the respondent telling them that the survey is undergoing maintenance and asking them to continue later.

4. Select whether you wish to enforce a new version of the survey (see Overwriting Running Interviews on page 535 for more information).
5. Select the survey mode(s) you wish to use.

   If you select the **Web Survey** channel, the two sub-options become available (see The Survey Channels Tab Mobile Phone Options on page 496 for more information). If you then also select the Smartphones option, touch rendering will be activated for the survey when the respondent accesses the survey via a smartphone. Note that you can switch off the touch rendering functionality for individual pages in the survey by going to the page editor for the survey page in question (see The Page Object on page 303 for more information).

   If you select the **CAPI/Kiosk Survey** option and the Smartphones option, the survey will be rendered for smartphones and touch rendering will be activated when the interviewer accesses the survey via a smartphone.

   If you select the **Offline self-completion survey** option, your respondents will be able to use the AskMe app (see AskMe - Introduction on page 654 for more information).
6. Click **Launch Survey** to start the task.

Note: When you launch a survey in CAPI/Kiosk or CATI modes (you have checked the CAPI/Kiosk or CATI Survey boxes in the Launch Survey window) you will automatically be given the "Supervise CATI/CAPI Survey" permission for that survey (see Permissions on page 185 for more information).

When you compile the database for the first time, you are presented with a drop-down dialog asking you to confirm the creation of the initial database. If you click **OK**, a new database will be created and compiled. This may take some time, depending on the length of your survey.

During compilation and WI generation, the system performs a number of checks to ensure the integrity of the survey. The Launch Survey page is displayed, which shows the task progress and lists the procedures as they are completed. When the compilation task is complete, the URL to the survey is displayed at the bottom of the page. You can copy the URL to your clipboard and from there paste it into email etc. as required.

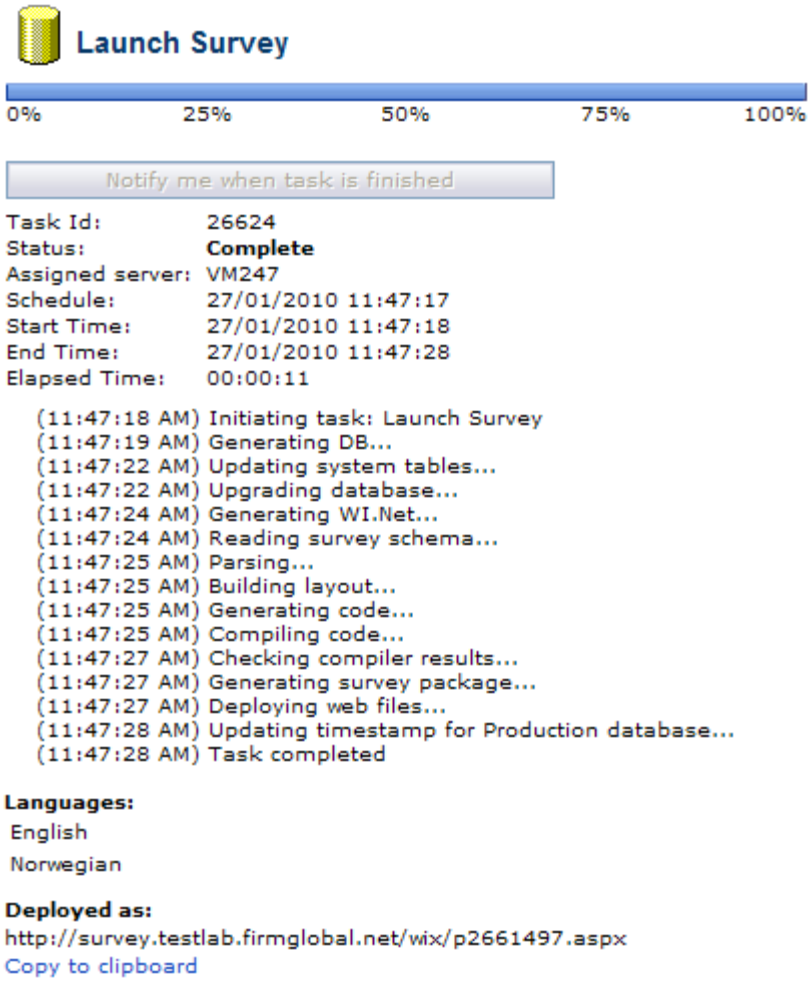


Figure 575 Example of the Launch Survey page on completion of the task

The system will stop the compilation/generation process with an error message in the following cases:

- if you have non-unique form ID's in the questionnaire.
- If there is a conflict between a multi variable (for example q1_1, that is question ID q1 and code 1) and a single or open text question with question ID q1_1.
- if you use the same iteration code twice in a loop.
- if the codes of the Single and Grid questions occupy more space than specified in Field Width (see Answers on page 237 for more information).
- if the codes contain illegal characters. Codes can only contain alphanumeric characters, and underscore (_), with no white space.
- if a database column header is too long. In the database, the column headers are constructed as a combination of the question id and the code, and are limited to 50 characters. Care must therefore be taken when allocating codes for grid and multi questions if the code maximum has been increased above its default setting of 32 characters. (see Answers on page 237 for more information).

- if the codes in Answers (Single, Multi, Grid) and Scales (Grid) are not unique. In legacy surveys where the Code check functionality is disabled (a setting in the **Survey Management > Overview** page, which is available only to software administrators) the generation task will ble completed with a warning about non-unique codes.
- if any reserved keywords are used as question IDs (see APPENDIX C: RESERVED KEYWORDS on page 860 for more information).

The check will also check if the survey has any questions with empty answers or illegal properties (see Quality Control on page 472 for more information).

Important
The survey is built on a secure (https) site. In the event the survey contains references to non-secure content (http pages), a warning will be presented in the Launch Survey page. If such a warning is presented, you should investigate (see Scanning for HTTP Content on page 489 for more information), and remove the reference or move the non-secure content to a secure site. In the near future Confirmit Horizons will no longer accept links to non-secure pages. After this time, any such non-secure content will cause the compilation to fail.

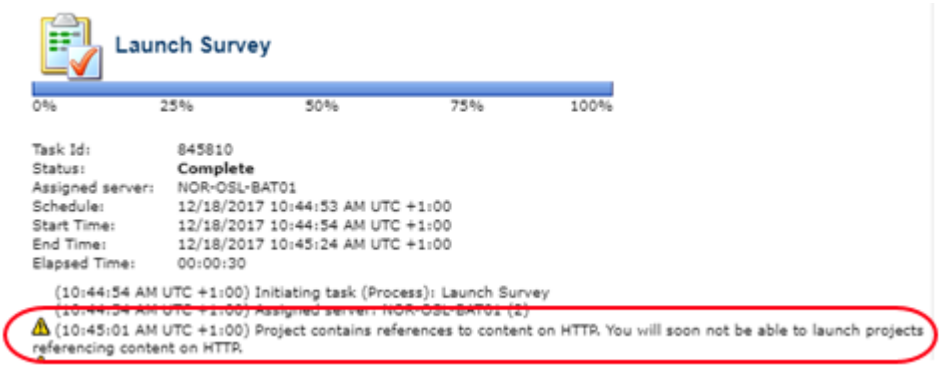


Figure 576 Example of the insecure content warning

In the majority of cases you should only update the database. This applies especially when you are making changes in a running survey. This option will preserve all data (responses, respondents, quotas, etc.) in the database, and is quicker.

When you have run a test-phase in production mode however, it may be useful to start from scratch by recreating the database in order to delete the test data from the production database.

WARNING:
Recreating the database will delete all data in the database. NEVER do this in a running production database.

SaaS only:
To avoid filling storage space unnecessarily, Confirmit does not guarantee that test databases are saved on the server for more than two weeks.

17.2.1. Points to Note when Updating an Existing Database

After inserting a question into the questionnaire or moving a question within the questionnaire:

If you insert a question into an existing questionnaire tree either by creating a new question, duplicating or moving an existing question, and you place the question within the questionnaire tree (not on the end), for example q1, q2, **q5**, q3, q4, where q5 is the inserted question, then when you re-launch the survey to update the database, the choices available for "Generate Database" will have the following effects on exported Data:

- **Update existing database (rebuild)** - the inserted question will be in the order as it appears on the question tree (for example: q1, q2, **q5**, q3, q4. where q5 is the inserted question)

- **Create new database** - as this creates a completely new database, the inserted question will be located in its correct place in the questionnaire.

Note: When launching a survey and updating an existing database, the database may be locked for a short period as it is updated. If a respondent is in the survey at the time, the survey will be closed and a message will be presented to the respondent telling them that the survey is undergoing maintenance and asking them to continue later.

17.2.2. Web Interview Files

The web interview generator produces a file capable of:

- Displaying forms for user input over the web,
- Storing the respondent's answers, and
- Controlling questionnaire flow based on background data (if available) and answers received.

Descriptions of the available options are provided in the following sections.

The URL to an open survey will always be http://survey.confirmit.com/wix/pXXXXXXXX.aspx, or https://survey.confirmit.com/wix/pXXXXXXXX.aspx if you are using HTTPS. (pXXXXXXX is the survey number).

Login only:
The URL to the survey will always be http://survey.confirmit.com/wix/pXXXXXXXX.aspx, or https://survey.confirmit.com/wix/pXXXXXXXX.aspx if you choose to run the survey from a secure site.

17.2.3. Enabling External Test Access

When launching a survey in the Test database, you have the option to allow access by external users so they can test the questionnaire.

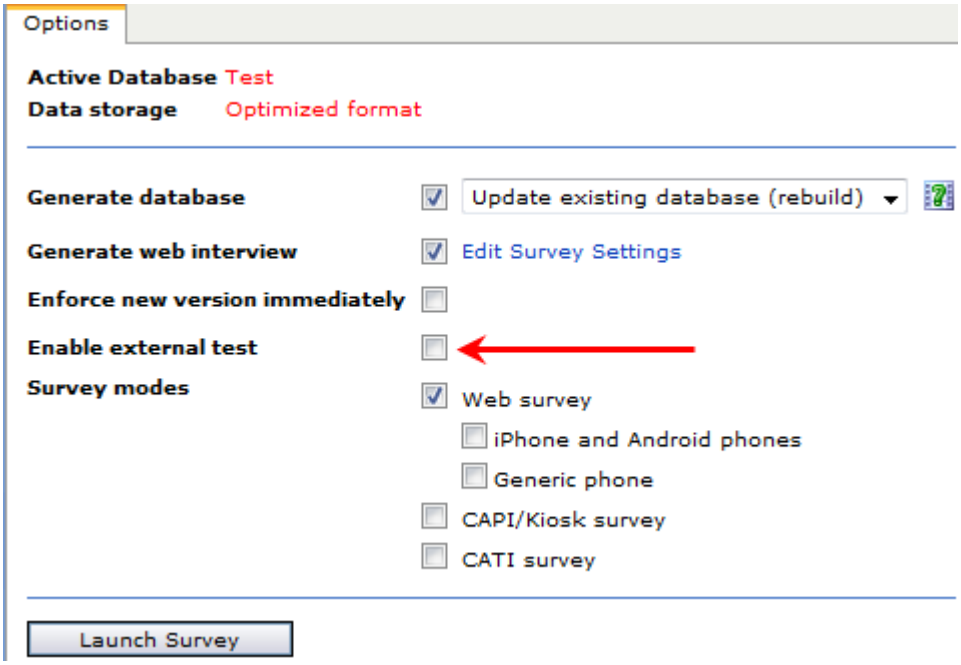


Figure 577 The Launch Options dialog for the Test database

When you select **Enable External Test**, the survey files will be made available at the deployment servers and the link for the test survey will be displayed at the bottom of the task execution log. The link contains a cryptic key to prevent unauthorized access to the test survey - see below.

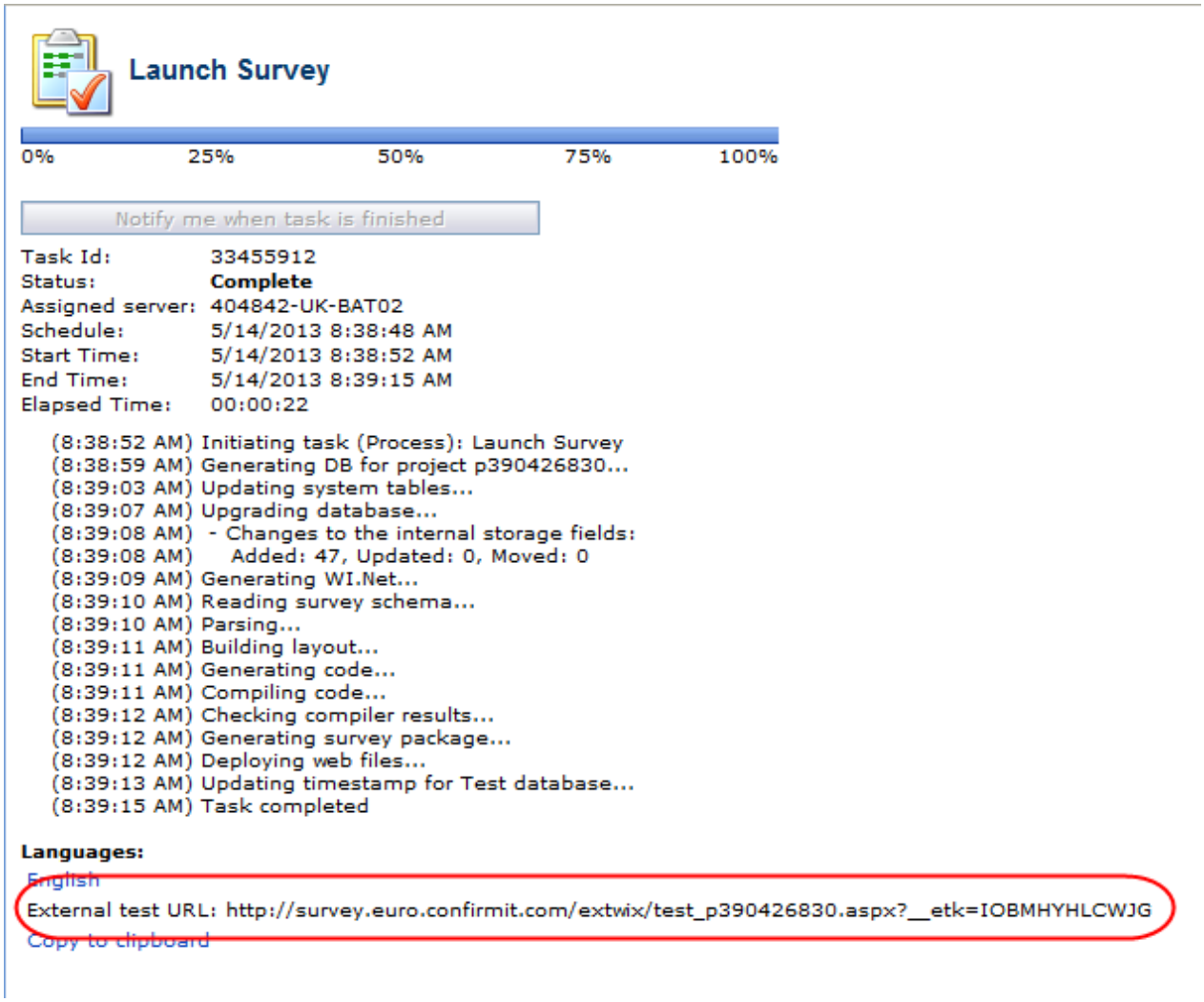


Figure 578 Example of the link on the task log

The external test link is also displayed on the Survey Overview page (see The General Tab on page 174 for more information). This page also contains a field indicating whether the production and test databases are in sync; i.e. have the same "last modified" timestamp. This is to tell the author whether the people testing the survey are seeing the same version of the survey as that which is currently online.

Note: The maximum limit for the number of external users that can access the test database to test the survey is 100. The "External Test Response Limit" is displayed at the bottom of the Interview Progress page. Note that only Web interviews are counted against this limit; not RDG responses.

17.2.4. Enabling Database Encryption

Note: Database encryption is a company add-on and is subject to payment. If your company does not have the add-on, then the option will not be available in the Launch Survey page.

When launching a survey in the production database, the Enable Database Encryption option is available. If you select this option, the production survey database will be encrypted. The data that will be encrypted will include Response, Respondent and Hub data.

Note that it is not possible to change the encryption state of a previously launched database; once a database is launched, if you wish to change the encryption state you must create a new database.

If the Enforce Encryption option is set for your company (check with your Confirmit company administrator) then the Enable Database Encryption option will also be available when launching test databases.

17.2.5. The Error Frame for Script Errors and Debugging

When you launch a survey Confirmit checks all scripting code that you have added. If any script errors are found, then the launch is aborted and a frame opens below the task pane. This frame lists all the errors that have been found, and indicates where in the survey the error is located.

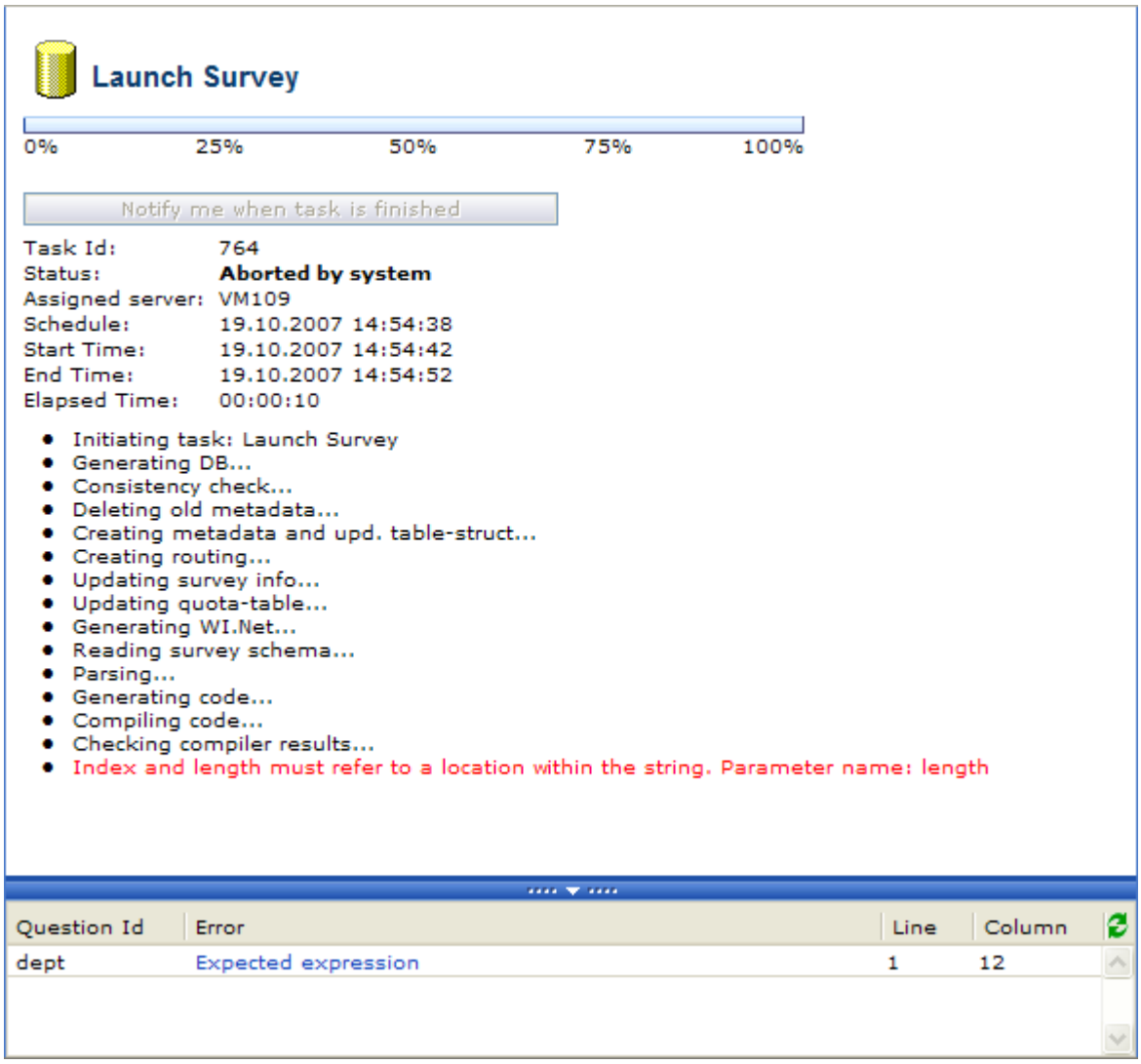


Figure 579 Example of a script error frame with an error link

Click the link in the error pane to open the appropriate question at the tab containing the scripting error.

You can also view runtime errors in the frame. These could be script, page or component errors that occur during runtime. The list is searchable, and includes links to the page, script or component causing the error.

17.3. The Survey Versioning Functionality

Each time a survey is launched, a new version of the files is made. In practice, this means that a new set of the XML files (including all the properties and settings), and a survey package (binary) file, are stored in the database.

The storage of runtime files for the survey engine enables you to re-launch a survey whilst allowing active, live interviews to remain in the version they are currently in (see Overwriting Running Interviews on page 535 for more information). You can however enforce the new survey version onto existing live interviewing sessions immediately, if you need for example to correct a serious problem in the interview. Up to three versions of the survey can be stored; the current version and the two previous versions, allowing respondents time to complete the version of the survey they started. This number is configurable for the company.

The version number of the survey that each respondent has answered is stored in the database. This information cannot currently be used, for example to filter the data prior to creating a report, though it can be useful to know, for example in the event some respondents appear to be missing some data.

The storage of the XML survey definitions enables you to see, in a tree-by-tree comparison, the changes that have been made to a number of previous versions of the questionnaire, and also enables you to revert (undo) changes that have been made (see The Version Comparison Tool on page 533 for more information). The number of previous versions viewable, and therefore the number of change levels that can be undone, is configurable for the company, with the default value currently being set at 10 versions.

Note: The Survey Comparison tool is currently only supported for Internet Explorer.

Note: On-Premise customers can set this value as they wish; refer to the Server Administrator Guide for details. For SaaS customers, Confirmit reserves the right to reduce the number of survey versions saved in the event storage space becomes excessively congested.

17.3.1. The Version Comparison Tool

You can compare two versions of the questionnaire tree to see the differences between the two versions. The comparison highlights differences between the compared versions, and allows specific changes to be reverted (undone). If you double-click on a particular node, its details are displayed below the tree window (again color-highlighted).

Note: The Survey Comparison tool is currently only supported for Internet Explorer.

To compare two versions of a questionnaire:

1. Whilst in the Questionnaire Designer, click the **Compare Survey Versions** button located towards the right end of the toolbar or go to the **Designer > Compare Survey Versions** menu command.

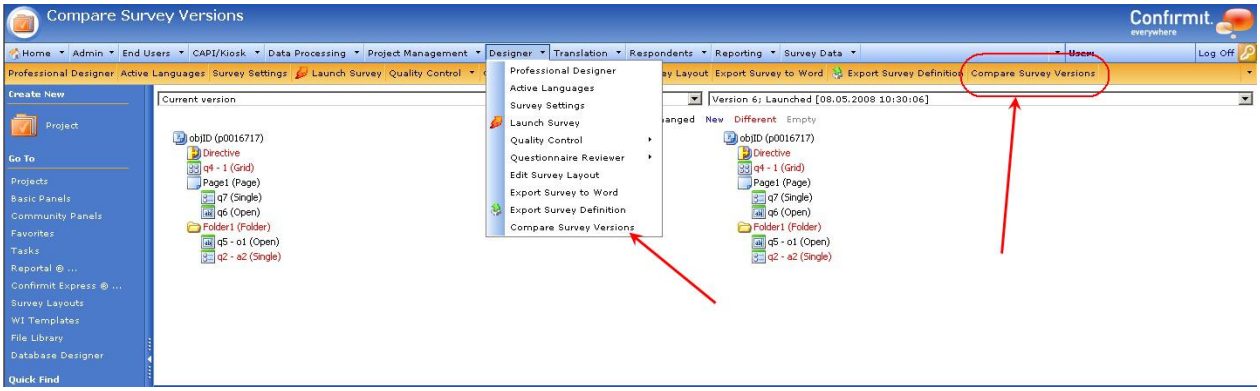


Figure 580 Example of the Survey Versions Comparison window

2. Click the down-arrows beside the version fields to open drop-down lists of the questionnaire versions stored, and select the versions you wish to compare.

   The number of versions available is configurable for the company, three versions (the current version and 2 older versions) being the default setting. The questionnaire trees for the selected versions are displayed, as shown above.

The color coding for the nodes is as follows:

- Nodes with black text - these are the same in both selected versions, so have not been changed.
- Nodes with red text - these contain differences, so the later version of the node has been changed.
- Nodes with blue text - these are new in the later version, so did not exist in the older version. Note that nodes that are blue in the newer version are grayed out and do not have icons in the older version.

In the Current version, you can undo changes that have been made in a node and revert the node back to the condition and settings as they were applied in the other selected version. To do this:

1. Ensure the 'other' selected version is the correct one.
2. Right-click on the node you wish to undo changes for, then select **Revert** from the drop-down menu.

Double-click on a node in the tree window to display the XML code for that node in the lower area of the window (see XML Comparison on page 534 for more information).

17.3.1.1. XML Comparison

If you wish to view the XML code of a node, double-click on the node in the tree window. This displays the XML code for both the selected versions of that node in the lower area of the window.

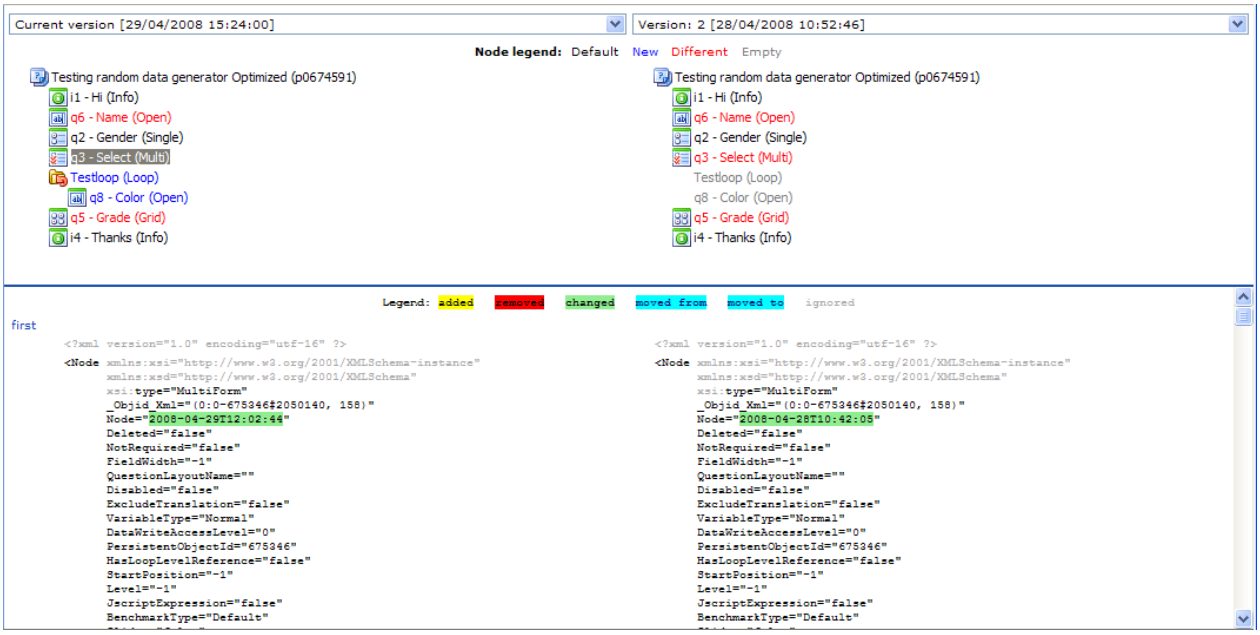


Figure 581 Example of the XML Comparison functionality

Here, the XML code is color-coded so you can easily see the differences between the two versions. The color-coding is as follows:

- Yellow background - this is new code that has been added to the node.
- Red background - this is code that has been removed from the node.
- Green background - denotes code that has changed.
- Blue background - denotes code that has been moved from one place in the file to another.
- Grayed out - this code is underlying setup code, is never changed, and is ignored by the comparator.

17.3.2. Overwriting Running Interviews

For Optimized databases, if you re-launch a survey while a respondent is answering it, then the respondent will normally remain in the older un-updated version of the survey until he/she leaves the survey. However in the event you wish to update the survey for all respondents immediately, for example you discover a serious fault in the survey that must be corrected as soon as possible, then you can force "open" surveys to be updated to the later version. To do this:

1. In the **Launch Survey > Options** tab, check the "Enforce new version immediately" box.
2. Save the changes

   Now when the survey is re-launched, respondents currently working in the survey will also be updated to the newer version of the survey.

If a respondent leaves the survey for any reason and later returns, then on reentry he/she will always be presented with the updated version of the survey.

Note: If you use the "Enforce new version immediately" property on a survey in which you have made extensive changes, then this may cause confusion for any respondents currently answering the survey. In addition, it may also disturb the survey logic for respondents in progress, and this in turn may reduce the quality and usefulness of the data provided by those respondents. You will need to assess the reasons for the re-launch, and possible effects, for each case individually.

Note: Only two older versions of a survey are saved. Therefore if you re-launch a live survey too often, you risk forcibly updating respondents anyway, even though you have not checked the Enforce... box. If you have to re-launch a live survey several times and do not wish to enforce the new version on any respondents who may be answering the survey, ensure you wait long enough between re-launches to allow those respondents to complete the survey.

17.4. Survey Deployment by a Standard User

As a Standard user, to launch a survey:

1. Click the **Deploy Survey** button in the Designer toolbar.

   The the Deploy Survey wizard opens at the Survey Type page.

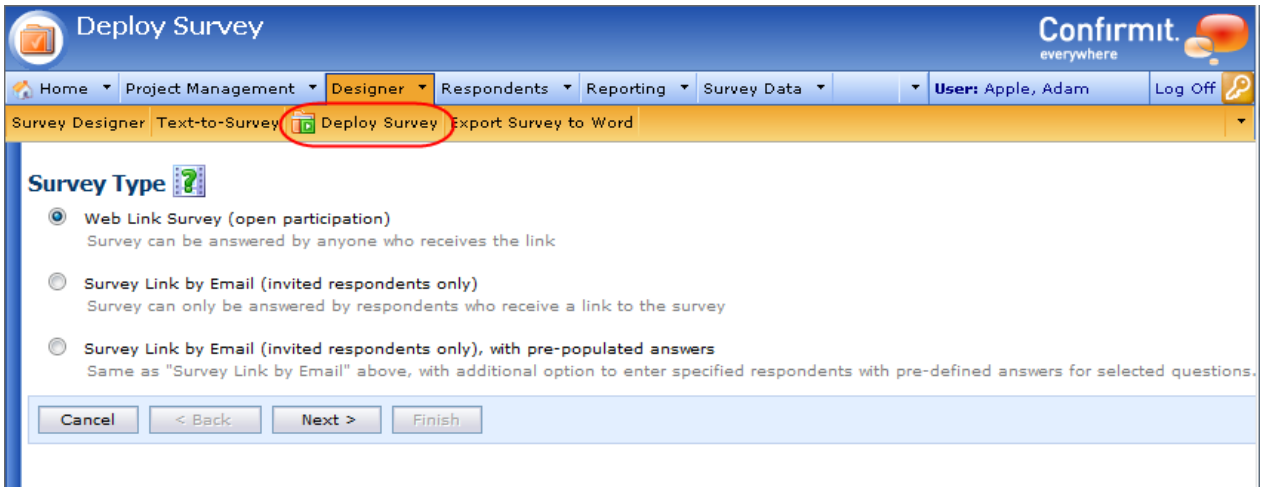


Figure 582 The Survey Type page

2. Select the desired type of survey, and click **Next**.

   The next page that opens depends on the selection you have made in the Survey Type page.

o If you have selected Web Link Survey, the Survey Settings page opens as the next step in the procedure (see Standard User - Survey Settings Page on page 537 for more information).

o If you have selected Survey Link by Email, the Respondent Tracking page opens (see Respondent Tracking on page 537 for more information).

o If you have selected Survey Link by Email with pre-populated answers, the Questions page opens (see The Questions Page on page 536 for more information).

Note: If you select one of the Survey Link by Email options, once the survey is deployed you will also need to add a list of the email addresses to which the survey link is to be sent (see Sending Email as a Standard User on page 582 for more information).

17.4.1. The Questions Page

If you have selected "Survey Link by Email with pre-populated answers", when you click **Next** the Questions page opens.

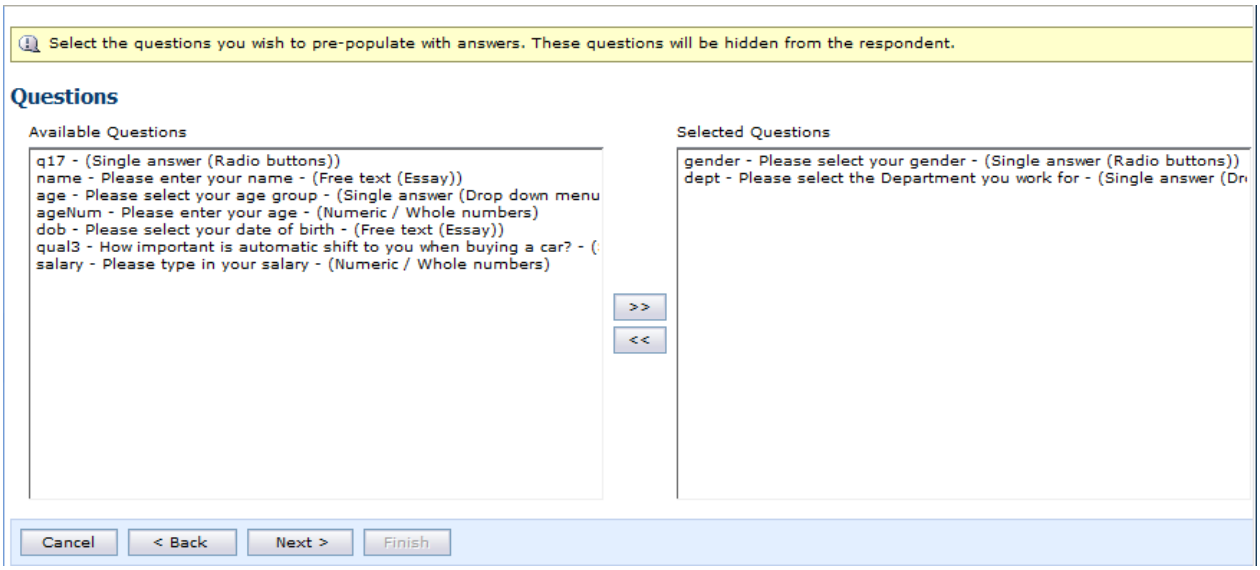


Figure 583 Example of the Questions page

Here you select the questions that you wish to pre-populate with answers. These questions will then be hidden from the respondents. To select a question:

1. In the Available Questions list, click on a question to select it.
2. Click the **>>** button to move the question to the Selected Questions list.
3. When you have selected all the questions you wish to pre-populate, click **Next** to proceed to the next page.

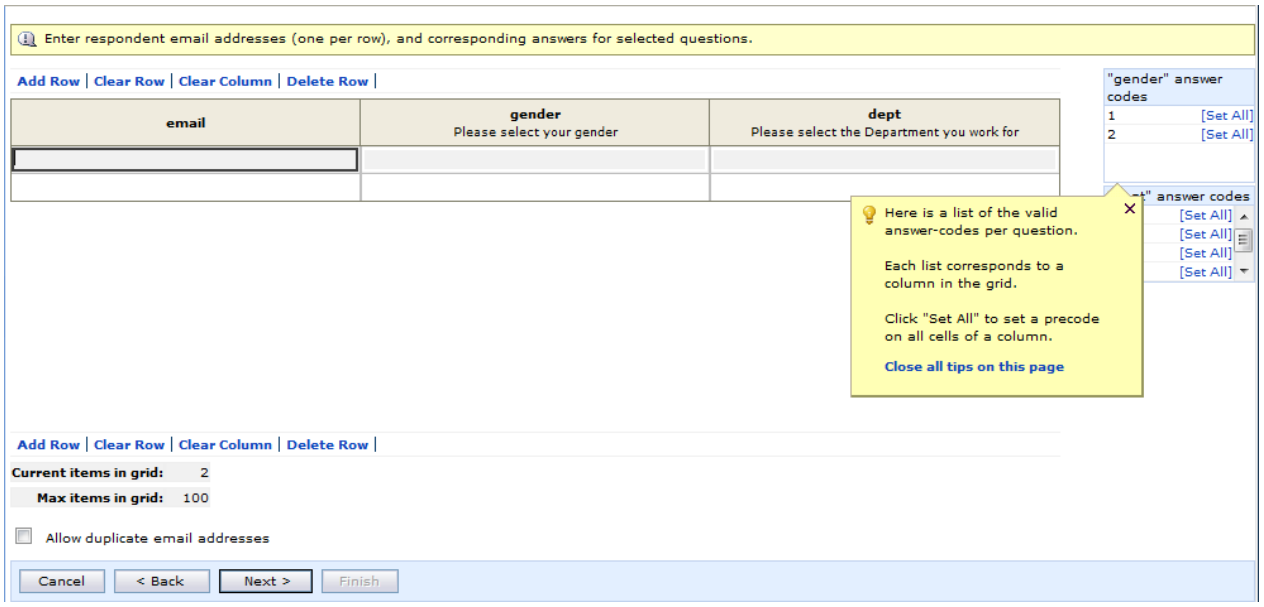


Figure 584 Example of the email and answer page

Here you add the email address for each respondent and the answer for each question selected in the previous page.

4. Click into the first field and type in the appropriate email address.
5. Click into the next field in the row and type in the appropriate answer.
6. Repeat for all the fields in the row, then press the down-arrow key on your keyboard or click **Add Row** to add a new row to the table.
7. Build the table for all the respondents and all the questions that are to be pre-populated.
8. Click **Next** to go to the Respondent Tracking page - see below.

17.4.2. Respondent Tracking

If you have selected one of the Survey Link by Email survey types, the Respondent Tracking page opens.

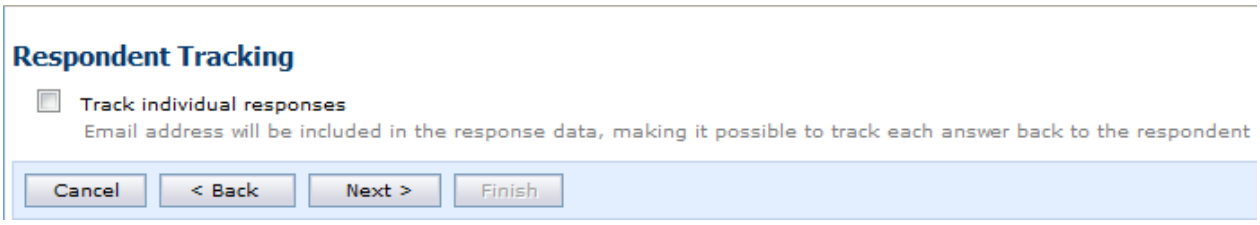


Figure 585 The Respondent Tracking page

Here you specify whether or not you wish to be able to track the answers given by the respondents back to the individual respondents who selected them.

1. Check / uncheck the box as required, then click **Next**.

   The Survey Settings page opens - see below.

17.4.3. Standard User - Survey Settings Page

Having made any intermediate settings as necessary, on clicking **Next** the Survey Settings page opens.

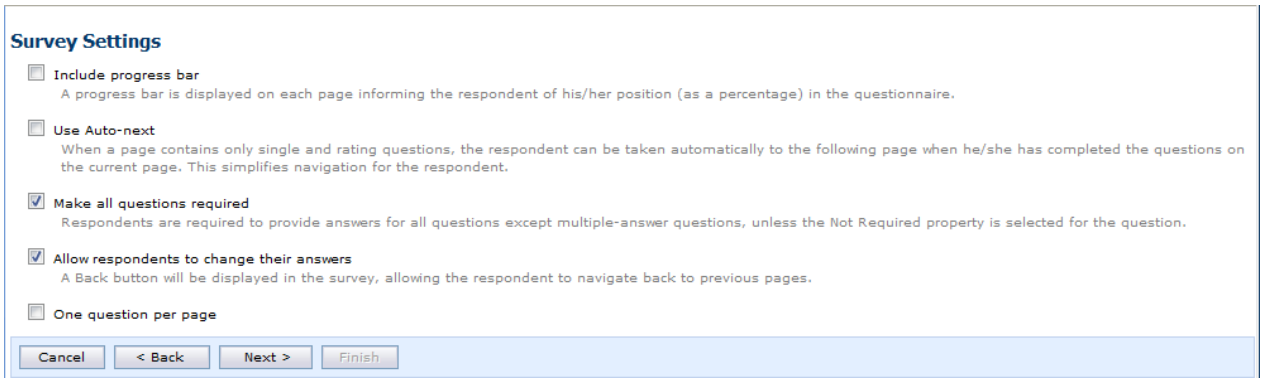


Figure 586 The Survey Settings page

1. Check / uncheck the boxes as required (see Survey Settings on page 492 for more information), then click **Next**.

   The Confirmation page opens.

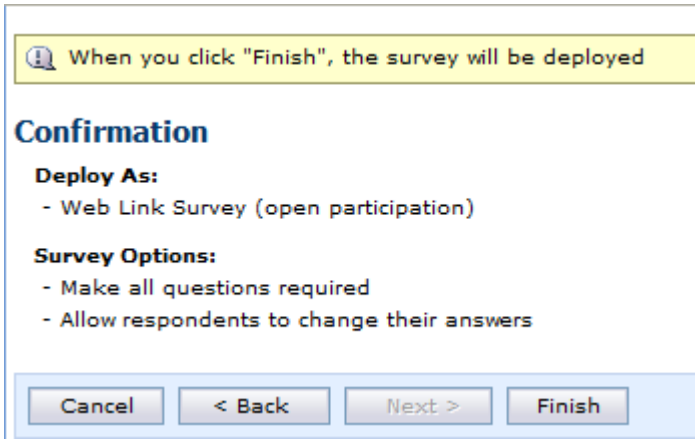


Figure 587 The Confirmation page

   Here you can check the settings you have selected for your survey.

2. If the settings are as required, click **Finish** to launch the survey, otherwise, click **Back** to return to the settings pages to change the settings.

   On launching, a task is initiated. When the task has run, the link to the survey is presented on the page.

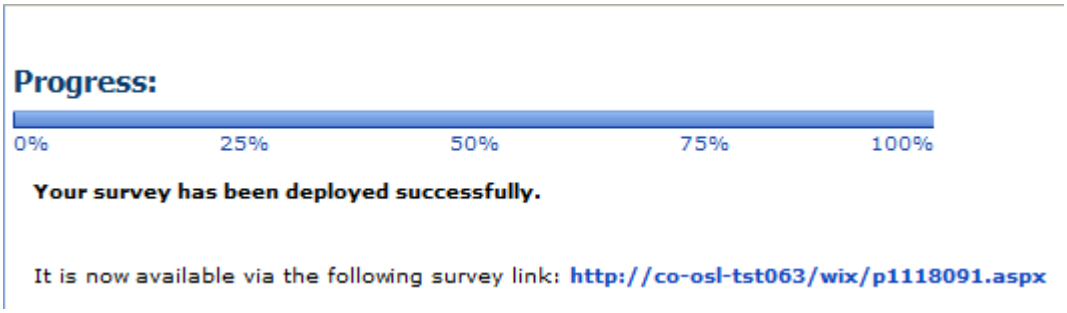


Figure 588 The Progress page showing the link to the survey

You can now copy the link and paste it into the appropriate web page, into an invitation email etc. as appropriate.

18. Handling Respondents in Limited Surveys

The term "Limited Survey" is derived from the fact that the survey is accessible by, and therefore limited to, only those respondents who are specifically invited to take part. The alternative is an "Open survey" which is open to anyone with access to the link (perhaps they found it on a web site for example). There are a number of reasons why you might choose to deploy a Limited survey over an Open survey. These include:

- You wish to create skip logic based on information you already know about respondents.
- You wish to match survey responses with the respondent background information, then report on them.
- You wish to send personalized invitations to the respondents asking them to participate in the survey.
- You wish to be able to send reminder invitations to "incomplete" or "not started" interviews.
- You wish to ensure that a respondent can complete the survey only once.
- You wish to allow respondents to return to an incomplete survey and continue where they left off.

To make a survey "limited", make the appropriate selections on the **Web Options** tab under the **Survey Management > Survey Settings** menu command (see The Web Options Tab Properties on page 504 for more information).

For targeted, non-public web interview surveys, you must prepare and upload a list of respondents. The sections in this chapter describe the steps needed to prepare the respondent list and upload it, and also how to edit the respondents' login page if so desired. The Sending Email section also describes how to send e-mails with invitations and reminders to participants of web surveys.

Note: Standard users have a simplified procedure for creating and sending emails (see Sending Email as a Standard User on page 582 for more information).

18.1. Preparing the Respondent List

The respondent list must be in the form of a tab-delimited text file, with column headings in the first row. This file can for example be exported from a spreadsheet application such as Microsoft® Excel™ by using the **Save As** function and choosing the format **Text (Tab delimited - .txt)**.

This data file will normally be prepared on the user's computer and subsequently uploaded into Confirmit.

The respondent data file must contain some or all of the following columns, depending on the type of survey.

Important
Ensure that the spelling used for the Column Name items is exactly the same as in the table below.

Column Name	Description	Limited WI
name	The full name of the respondent.	Optional
language	For multilingual surveys. The respondent's preferred language. The survey will be presented in this language (see appendix for language codes).	Optional
email	The respondent's e-mail address.	Required if the survey is to be sent to respondents via Confirmit.
userid	The respondent's userid if logon is required	Optional

password	The respondent's password if logon is required.	Optional

In addition to these columns, any background variables defined for the survey must be represented as columns in the respondent data file. **The column names for these background variables must exactly match the form IDs given to these background variables in the questionnaire designer** (see Question Properties on page 251 for more information). These new columns will be added to the database as required.

Note: Any columns added to the database will be allowed a maximum field width of 255 characters, and texts exceeding this limit will be truncated. However if the "Use data types of background variables for fields in respondent data" option is selected (see The General Options Tab Properties on page 493 for more information), you can set up questions in the respondent list that will accept more than 255 characters.

18.1.1. Use of Background Variables

In the respondent list you can include all the information you know about the respondent. This information can be used both in the survey itself and in reporting. To achieve this, you will have to include this information in the survey as questions and mark these questions as Background variables.

- If the information is unique for each respondent, for example the respondent's name or email address, the question type to be included in the survey is **Open Text**.
- If the information can be categorized, i.e. if several respondents belong to each category, for example department, country or language, the question type to be included in the survey is **Single.**
- If several variables of the same category can be applied to a respondent, for example visited websites, the question type to be included in the survey is **Multi**.

For example, assume you have the following information about your respondents:

- Email address
- Department (Administration, Marketing, Support or Sales)
- Visited websites (confirmit.com, altavista.com, yahoo.com, lycos.com)

A respondent can have one email address, can belong to one department, and can have visited several websites.

- In the survey, add three questions: one Open question with ID "email", one single question with ID "dept", and one multi question with ID "Web".
- In the single question "dept" insert four answers, one for each department, Administration, Marketing, Support, Sales, in Codes write adm, mark, supp, sales.
- In the multi question "Web" insert four answers, one for each website, confirmit.com, altavista.com, yahoo.com, lycos.com, with codes 1,2,3,4.
- Choose the Variable type "Background variable" for these questions.

Your respondent list must then have the following columns and content:

email	**dept**	**Web_1**	**Web_2**	**Web_3**	**Web_4**
aa@somewhere.com	adm	1	1	0	1
bb@somewhere.com	mark	1	0	1	1
cc@somewhere.com	supp	0	0	1	1

dd@somewhere.com	sales	0	1	1	1
ee@somewhere.com	supp	0	1	1	1

The content of the columns must be: the email address in the column “email”, the codes of the variables for the Single question “dept”, and 0 (not chosen) or 1 (chosen) for the Multi question “Web”.

Remember that each variable in a multi question will require a column in the respondent file.

The question IDs for the background variables must be identical with the column names in the respondent list.

The respondents will not receive these questions. Nevertheless, you will be able to use this information in the survey and when reporting, because the system will perform the linking between the respondent list and the background variables.

Note: Do not use reserved keywords as column headers in respondent lists. The system will perform a check during the upload process, and will generate an error message if reserved keywords are found (see APPENDIX C: RESERVED KEYWORDS on page 860 for more information).

Important:
Background variables only have "values" once the respondent has passed them in the survey (and provided the necessary answers). Until this point, the variables are regarded as being empty if they are used in text substitution or scripting.

Background variables must therefore be placed as early in the questionnaire as possible, preferably right at the beginning.

Special care must be taken when creating surveys that include a Start Block (see Call Blocks on page 298 for more information) if background variables are needed in the Start Block. The background variables MUST then be placed at the beginning of the Start Block such that they are passed first when the interview opens.

Note: For Optimized database surveys you can use date questions as background variables. When uploading respondent data, the date values must be in a format the system can recognize as a valid date. The recommended format is yyyy-mm-dd hh:mm:ss, or yyyy-mm-dd if you do not need to set a specific time.

18.2. How to Upload the Respondent List

Once the respondent data file has been prepared and saved as a tab-delimited text file, you can upload it into Confirmit. Note that you can only upload it into the survey's Production database. To do this:

1. Go to the **Respondents > Upload** menu command.

   The Upload Settings dialog opens.

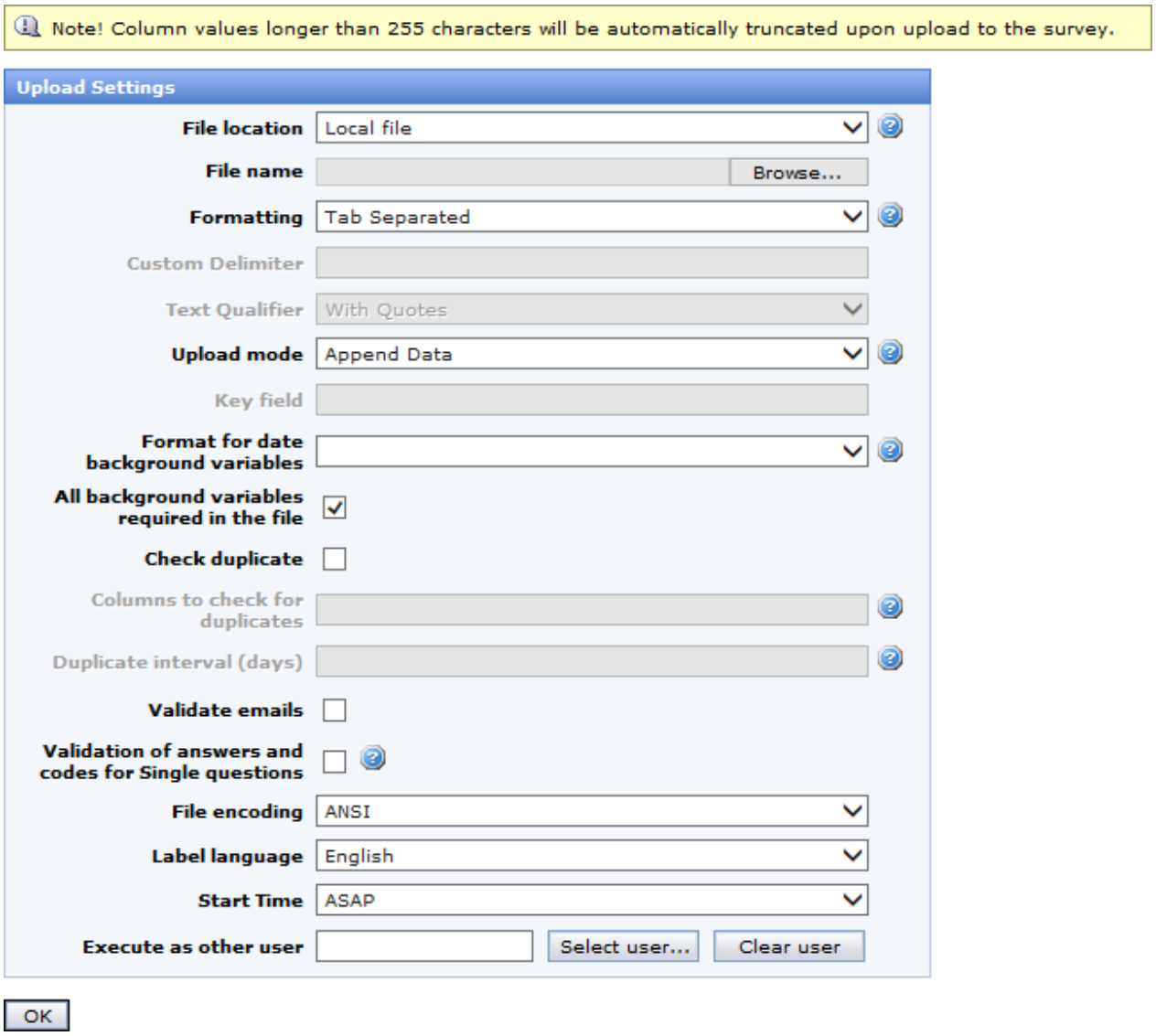


Figure 589 The Upload Settings dialog

2. Select whether you wish to upload the file or, if your company has licensed the FTP add-on, fetch it from the Confirmit FTP server or an external FTP server.

Note: The FTP functionality is a chargeable add-on, and provides additional options (see Respondent Uploading with Access to Data Transfer Encryption and FTP on page 546 for more information). If your company has not licensed this add-on then the option will not be available and the upload sequence will go directly to the next step.

Additional fields and options become available if you select one of the FTP options.

Note: A CATI Scheduling option appears if the survey is CATI-enabled (see CATI on page 648 for more information).

3. Click **Browse**, then find and select the required respondent data file.

Note: The respondent list must be a text document saved using the encoding format you select in this dialog. Additional empty columns at the ends of rows, and empty rows in the file, will be accepted.

4. Choose the required options, specify the start time for the job, and click **Finish**.

The options and data fields are as follows:

- **File location -** import files can be uploaded directly in the browser or, if your company has licensed the FTP add-on, placed on a Confirmit FTP server and retrieved from there or imported from an external FTP server.
- **File name** - the file that is to be uploaded.
- **Formatting** - the format used for the file to be uploaded.
    - **Tab separated -** the columns in the file are separated by tabs.
    - **Comma separated -** the columns in the file are separated by commas.
    - **Custom -** a different character has been used as the separator. Type the character that has been used as the delimiter into the Custom Delimiter field.
- **Text Qualifier -** this property is available when you select Formatting as Comma separated or Custom. In these conditions, the separating character has a special meaning; it is used to separate the different values from the different variables. However some texts to be imported may include punctuation. Specifying quotes around texts ensures that any punctuation does not corrupt the file layout.

Note: All fields in the Respondents table are text fields, therefore when Text Qualifier is "With quotes", all values will need to be enclosed in quotes.

- **Upload Mode -** select the mode to be used when uploading the file. The options are:
    - **Append Data -** all records from the respondent file will be added to the respondent table whether or not they already exist in the table. Note that in the event records already exist in the table, these records will be duplicated. If the Check Duplicate Emails option is selected (see below) then the email addresses will be checked, and any records in the respondent file that have email addresses that already exist in the table will be ignored.
    - **Update Data -** any records in the source that already exist in the target survey database will be updated with values from the source. Any records in the source that do not already exist in the target survey database will be ignored.
    - **Merge Data -** both Append and Update modes are used - if there is no match in the key fields then the data will be added, and if there is a match then it will be updated.
- **Key Field -** for Update and Merge, a key field must be specified.
- **Format for date background variables -** use this option if the Respondent file contains a column which will be uploaded to a background variable of Question type "Date" (Optimized Database Format only), and the date value in the file differs from a format that is supported by the system (yyyy-mm-dd hh:mm:ss or yyyy-mm-dd). The corresponding date format can either be selected from the predefined drop-down list, or manually typed into the custom field by using the standard format codes: "y" for year, "M" for month, "d" for day, "m" for minutes, "s" for seconds, "tt" the AM/PM designator.

  For a full description of all possible format codes and allowable date formats, refer to the Microsoft support website (http://msdn.microsoft.com/en-us/library/8kb3ddd4.aspx).
- **All background variables required in file -** If the box is checked and the file does not include all the background variables, the file will not be uploaded and a warning will be displayed. If the upload file does not include all the background variables, uncheck this box to allow the file to be uploaded. Default - checked.
- **Check Duplicate -** when selected, the uploaded file will be checked for duplicates. If a record already exists in the respondent database then subsequent records will be rejected from the upload task (the task owner will be emailed notification with a list of rejected records). Respondent records are uploaded in the order they occur in the upload file, therefore in a file containing two duplicate records, the first record will be uploaded to the Respondent table and the second record will be rejected.
- **Columns to check for duplicates -** allows you to specify which columns in the uploaded file are to be checked for duplicate rows. By default the "email" column will be added to the field. If the uploaded file then contains rows with email addresses that already exist in the database or which have previously been uploaded, then those rows will not be uploaded. On completion of the upload, an output file listing any rows that have not been uploaded will be sent to the user.

You can overwrite the "email" default with any column which exists in the uploaded file. It is also possible to check more than 1 column, by adding multiple column names in the text field. In this case the column names must be separated by semi-colon as for example email;phone.

If more than 1 column has been specified, a row will be treated as a duplicate if it has the same values for all the specified columns as a row that already exists.

- **Duplicate Interval (days) -** becomes available when the Check Duplicate box is selected. If a value is specified, only data for respondents created N days prior to the task scheduling will be used for de-duping. Records with NULL in Created Date will also be included, unless updated through Respondent > Upload or Respondent > Edit.
- **Validate Emails** - when selected, the email addresses will be checked and rows containing invalid email addresses will not be uploaded. On completion of the upload, an output file listing the rows that have not been uploaded will be sent to the user.

Note: The Validate Emails functionality will only be applied if the file being uploaded contains an "email" column.

- **Validation of answers and codes for Single questions -** when selected, the codes and answers for single questions in the respondent file are validated (see Validation of Answers and Codes for Single Questions on page 548 for more information).
- **Label language -** (only available if Validation of answers and codes... is selected) In the import file, if the file language is something other than the default and you want to validate the labels, the system must be told which language to validate against. The drop-down lists all the languages specified for the survey; select the language the file is to be validated against.
- **CATI Scheduling** - (only available if the survey is CATI-enabled) Respondent data being loaded into a CATI-enabled survey can have one of the following scheduling modes applied:

  o **Schedule for now (default)** – this will simply load the respondent data into the CATI system with the extended status of "Fresh Sample", and create a standard call with the "time to call" set to Now.

  o **Simple scheduling (user assignment)** – This will by default create a call without an assignment, with a "time to call" set to Now. The following respondent data can adjust the call created:
  CatiInterviewerID will assign the call to the specified group/interviewer ID. A blank (or invalid) value will result in no explicit assignment being made.
  CatiCallTime will assign a date and time to a call based on the respondent time zone, or the local company time zone if no time zone is specified. A blank (or invalid) value will result in the "time to call" being set to Now. An example value could be: 2010-06-14 13:30.
  CatiExtendedStatus will assign the Extended status to that value. A blank (or invalid) value will result in the Extended status being set to Fresh Sample (16). Values other than 16 will not have a call created for them.
  DialMode will assign the call to be dialed with the given mode (for example 2 for Preview).

  o **Full scheduling** – this will run all respondent data through the full scheduling engine and adhere to all calling rules. This mode should be used if advanced scheduling is required at the respondent loading time.

Note: Sample files containing 'DialMode' as a background variable will automatically set the appropriate dial mode in CATI when sample is loaded.

- **File Encoding** - in the File Encoding drop-down menu, choose the encoding method used by the respondent list. Click **more…** to expand the list.
- **Start Time** - specifies when the task is to be added to the task list. Select either Immediately ("ASAP") or "Schedule for later execution". In the latter case the Task Settings page opens, where you specify when the task is to be executed and you can set it up as a recurring task.

Note: In the event the user has the necessary permissions, they can perform the import as a different user. The Execute as Other User field is then available below the Start Time field (see Executing Rules as Other User on page 827 for more information).

When you click **Finish**, the upload task will be added to the task list. If you have selected **ASAP** here, then the task will be performed as soon as possible depending on what other tasks are already listed. If you have selected **Schedule for later execution**, then when you click **Finish** the Recurrence Pattern dialog opens (see Scheduling an Email for Later Execution on page 778 for more information). This dialog enables you to set up the date and time for when you wish the upload to commence.

5. On completion, click **Upload…** to start uploading the respondent list to the Confirmit system.

   If the upload file contains errors, you will receive an email containing two files; one file contains the invalid records, and the other contains an explanation of why the records are invalid. If any invalid columns are discovered during the import, these being system columns or columns not found in the meta data, these errors will be logged in the task log.

Note: In the event you need to edit the respondent list after you have uploaded it, go to the Respondents > Edit menu command.

18.2.1. Respondent Uploading with Access to Data Transfer Encryption and FTP

Note: Data Transfer Encryption and FTP is an Add-On (see Data Transfer Encryption and FTP on page 6 for more information).

Important
When uploading respondent files using encryption and FTP, the name of the file you are uploading must be prefixed with the p-number of the survey you are uploading to. For example, if you are uploading to survey p123456, then the file name must be p123456*.txt.

For secure transfer of respondent data, the respondent file should be encrypted using Confirmit's public encryption key and then uploaded to Confirmit's FTP server or an external FTP server.

Note: When importing from External FTP, the user interface does not know the status of the file. A message will therefore be presented stating that the file does not exist. This message can be ignored.

To upload the file from an FTP server:

1. Open the survey and go to the **Respondents > Upload** menu command.

   The Upload Settings dialog opens.

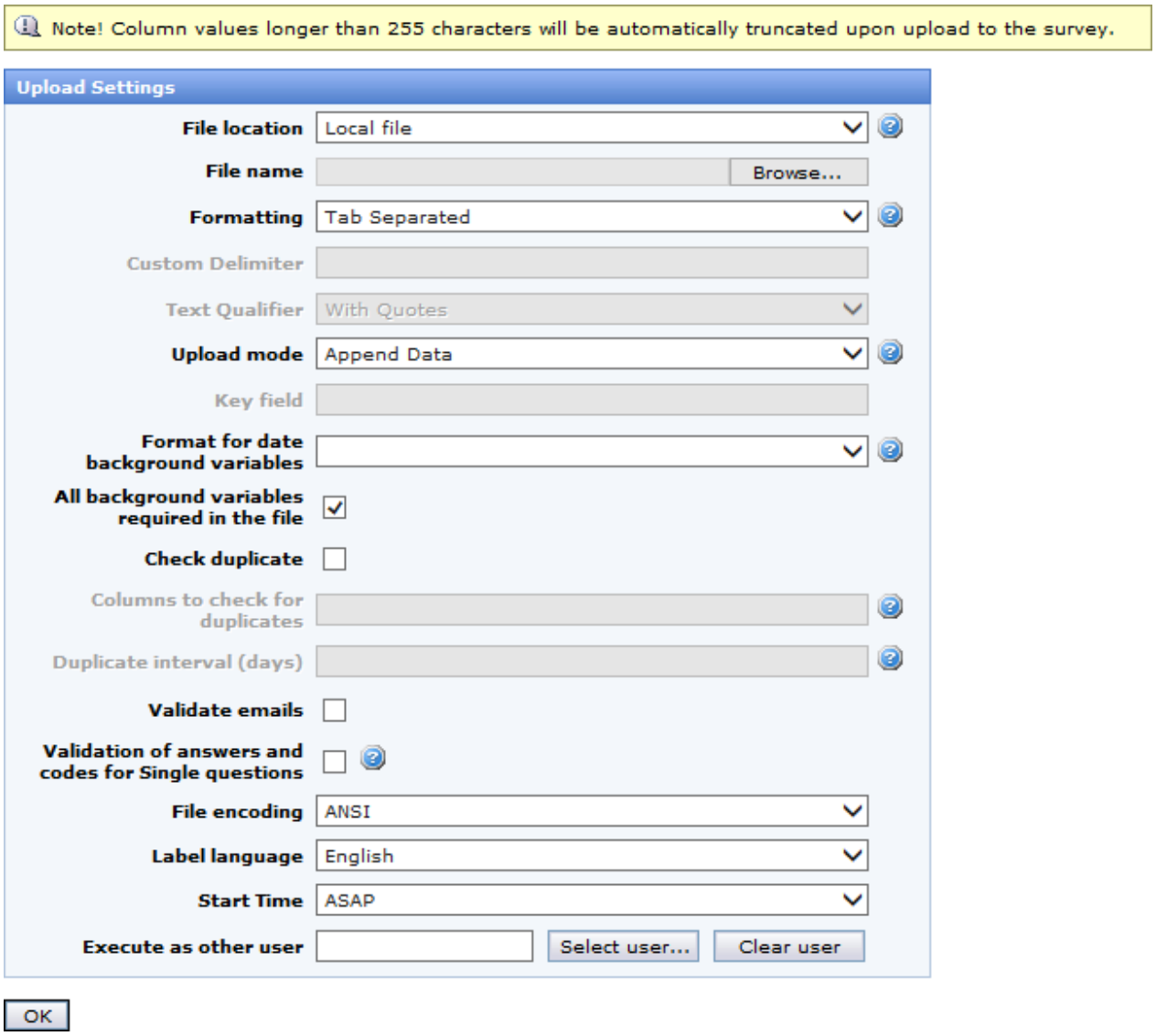


Figure 590 The Upload Settings dialog

2. Click the down-arrow beside the File Location field and select FTP or External FTP.
3. Type in the file name and choose the required options (note that a number of additional options become available depending on which choice is made), specify the start time for the job, and click **Finish** (see How to Upload the Respondent List on page 542 for more information).

Note: Confirmit FTP imports support the use of wildcards in the file name. * gives zero or more characters, ? gives exactly zero or one character. For example, p?_*.txt - will match p1_20082012.txt and p2_22082012.txt.

Confirmit will pick up the specified file, decrypt it using the user's private encryption key, and then upload the respondents into the specified survey.

Note: If your company has licensed the Encryption add-on, encryption is handled automatically on respondent upload. Then if the file you are uploading has the file extension *.pgp, the system will treat it as being encrypted, and automatically decrypt it (see Data Transfer Encryption and FTP on page 6 for more information).

18.2.2. Validation of Answers and Codes for Single Questions

When this checkbox is selected, the codes and answers for single questions in the respondent file are validated. The validation process will first check if the value specified in the file exists as a code. If it does, the record will be uploaded. If it does not exist, the validation process will check if the value is specified as an answer label in the Single question. If so, the label will be converted to the code specified in the Single question and stored as such.

If this validation process fails, the record will be rejected and a notification email with the rejected records will be sent to the user.

Example 1:

A survey contains one background variable. The Single question “City” contains the following answers:

- “London”, with Code = 1
- “San Francisco”, with Code = 2
- “Oslo”, with Code = 3

The respondent file looks like:

```
City
1
2
3
4
```

In the first step the validation checks if the values specified in the file exist as codes, in the second step if they exist as answer labels. As “4” does not exist as a code or a label, it will be rejected and a notification email with the rejected records sent to the user.

Example 2:

The respondent file contains the answer labels as follows:

```
City
London
San Francisco
Moscow
```

In the first step the validation checks if the values specified in the file exist as codes, in the second step if they exist as answer labels. As “Moscow” does not exist as a code or a label, it will be rejected and a notification email with the rejected records sent to the user.

Example 3:

A survey contains two background variables; the single question “City” and the single question “Region”. The single question “Region” contains the following answers:

- EMA, with code = 1
- US, with code = 2

The respondent file contains a mixture of labels and codes; “City” has the labels and “Region” has the codes as specified below:

City	Region
London	1
San Francisco	3
Moscow	1

The validation will process this exactly as outlined in the previous examples. In the first step the validation checks if the values specified in the file exist as codes, in the second step if they exist as answer labels. As Region '3' and City "Moscow" do not exist as a code or a label, both records will be rejected and a notification email with the rejected records will be sent to the user.

Note: Be aware that only "Normal answerlist" as answers in the Single questions is supported. When answers are retrieved by a "Table lookup" or "Hierarchy lookup" in Database Designer, the validation setting will be ignored.

18.3. Editing the Respondents' Login Page

If you are creating a limited survey with login page, the layout and texts for the login page are set up by default. However you can change these if required.

The messages that appear on the login dialog, for example the "Please log in" text, are set for the specific survey in the **Survey Management > Survey Messages** page. Here, (see Survey Messages on page 190 for more information). If you wish to change the default settings for your company, then you must log in as an administrator and go to the **Admin > Languages and Messages > Survey Messages** menu command. From this point on the procedure is the same as for a normal user. Refer to the Confirmit Administrator Manual for further information.

If you wish to set up the "background" page on which the Login dialog is presented, you do this by creating a specific theme for the login page to use. Create and set up a theme in the survey's Questionnaire Tree (see Themes on page 76 for more information), then right-click on the theme in the tree and select **Use by Login**.

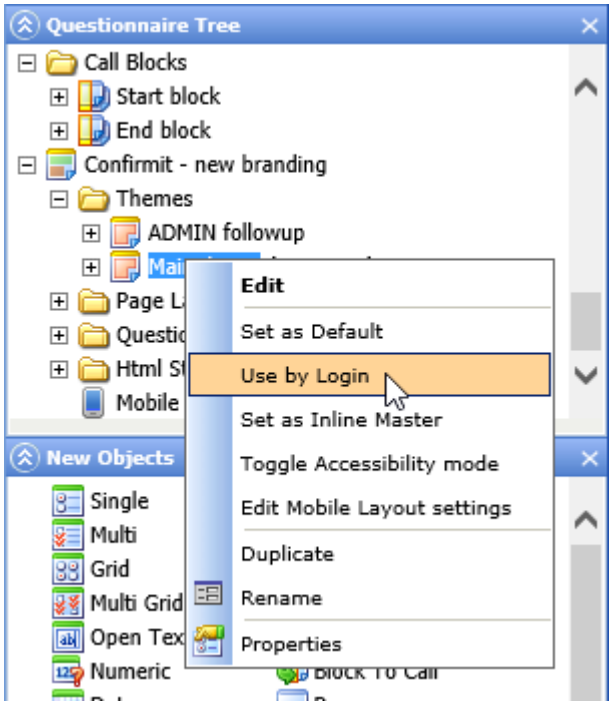


Figure 591 Setting a theme to be used by the login page

This theme will now be used by the login page, and you can set this up as you wish without effecting any of the other pages in the survey.

18.4. Respondent Data Editor

The Respondent Data Editor is a tool for editing the respondent data in the database. The respondent data is saved in a table called “respondent” in the database, and it includes all information uploaded in the respondent file and also some system generated fields. The Respondent Data Editor is linked to the Emailing Report functionality (see Email Delivery Report on page 578 for more information), and any changes that are performed there will be reflected in the Respondent Data Editor.

To open the Respondent Data Editor, go to the **Respondents > Edit** menu command.

Note: From the Respondent Editor, you cannot edit answers that the respondents have given to questions in the survey.

18.4.1. The Editor Window

To open the Respondent Data Editor, go to the **Respondents > Edit** menu command.

The Editor page is divided into three frames:

- The upper-right frame holds action buttons, selection fields and buttons, and displays the columns that are selected in the Select Columns dialog (see Select Columns and Define a View on page 553 for more information). Note that each column displayed has a search field in the column header that allows you to search for specific respondent data. Type search criteria into the column search fields such that only the required respondents are displayed.
- The lower-right frame is for displaying and editing respondent data. Click on a blue respid link in the upper frame to display the data for the selected respondent.
- The frame on the left displays a list of the User Fields and System Fields available in the currently selected survey. If you double-click on a variable in the left frame, an overlay opens where you can change the value for the variable for all respondents currently visible in the upper-right frame.

You can re-size the frames by dragging the internal borders.

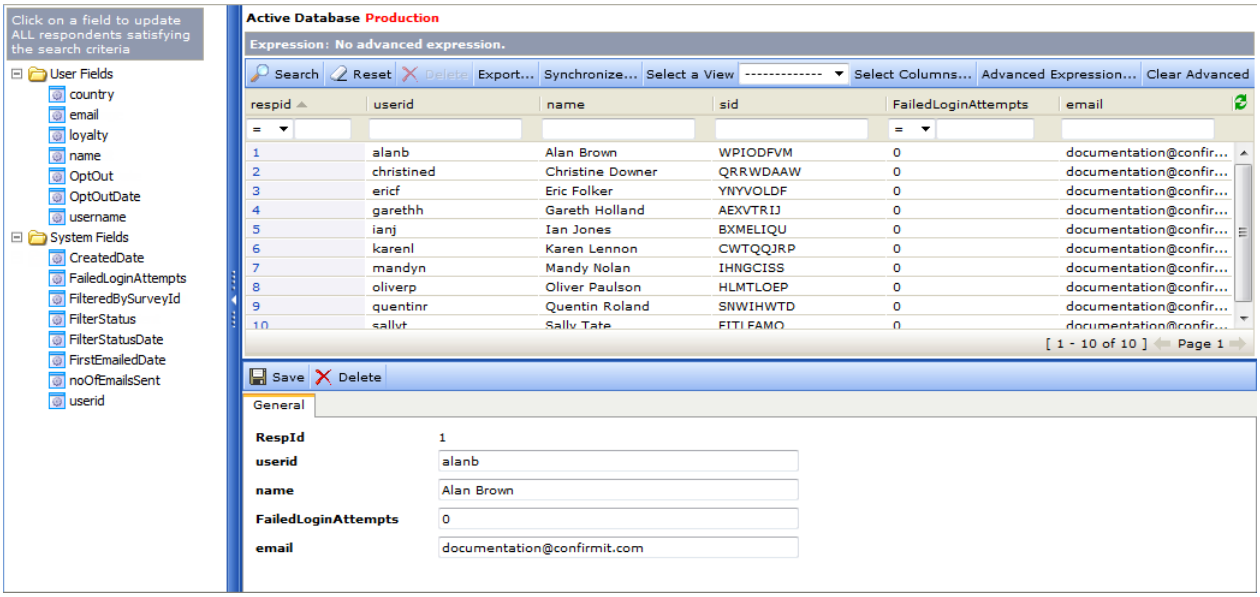


Figure 592 Example of the Respondent Data Editor

Note: The SMTP fields will be available when Email Delivery Report is activated (see Email Delivery Report on page 578 for more information).

The left column User Fields list may include for example the respondents' name, email address, language etc. - all the variables/fields that are uploaded into the survey with the respondent list. The System Fields that are available will depend on the settings in the **Designer > Survey Settings** tabs, and may include:

- **CapiInterviewerId** - shows the ID of the CAPI interviewer to which the current respondent has been assigned. Refer to the CAPI User Guide for further details on the CAPI functionality.
- **userid** - shows the respondent's userid, that is uploaded together with the corresponding password to allow the respondent to log in to limited surveys.
- **sid** - shows the respondent's security ID. The sid is part of the survey link URL, and is a string of 8 random upper case characters. This means that there are 26^8(more than 200 billion) possible combinations for the sid. Note that the sid can be attached to the survey link URL "as-is" or it can be encrypted to increase security (see The Survey Link Column on page 558 for more information).
- **FailedLoginAttempts -** to prevent unauthorized access, a respondent will be locked out of a survey after 10 failed login attempts. The message "This user cannot be logged on" will then be displayed to the respondent. To allow the respondent further login attempts, the project owner or an administrator must reset the counter. To do this, select the "FailedLoginAttempts" column using the Select Columns dialog (see Select Columns and Define a View on page 553 for more information), and reset the counter value for that respondent to 0.

The following three Filter... fields are all set by Contact Frequency Rules, if the survey is added to a Hub and linked to a contact database with Contact Frequency Rules set.

- **FilteredBySurveyId -** is set if the emailing is blocked by Contact Frequency Rules, and will have the project id of the previous invite that fell within the limit. This can be in the same project or another project, depending on the circumstances.
- **FilterStatus -** when this is 1, the emailing has been stopped for this respondent due to a contact frequency rule. When this is 0, the emailing passed and was not stopped by the Contact Frequency Rules.
- **FilterStatusDate -** is the timestamp for when the status was set.
- **FirstEmailedDate -** is set when the first email invitation is sent, and is used when setting links to expire a number of days after the initial invitation is sent (see The Web Options Tab Properties on page 504 for more information).
- **smtpcode** - shows the response code. The response code is the answer from the recipients email server. Code between 500 and 599 means "Permanent Error". Code between 400 and 499 means "Temporary Failure". For example an ordinary "Permanent Error" is “550 MailboxNotFound”, a "Temporary Failure" is 452 InsufficientSystemStorage. These codes are standard codes that most email servers return. The text for the codes can vary from server to server.
- **smtpstatus** - current status of last sendout for a specific email: BadMail, Queued, MessageSent, NonDeliveryReport.
- **smtpStatusDate** - a date/time stamp for the last SmtpStatus value. This allows you to link the last status value with the date/time it was returned. This can be used as a filter.
- **smtpTaskId** - taskId for the batch task that sent the email.
- **noOfEmailsSent** - search field; you can search for respondents by the number of emails that have been sent.

Toolbar buttons:

- **Delete** - deletes the selected respondent(s)
- **Search** - performs a search when the search parameters have been defined.
- **Export** - exports the active set of respondents and variables to Tab delimited ASCII file.
- **Synchronize** - enables you to update and/or append records from the respondent list into the response data (see Synchronization on page 564 for more information).
- **Select a View** - the drop-down displays Views that you have predefined in Select Columns (see below). The respondents are displayed according to the selected View.

- **Select Columns** - opens a pop-up window where you can select search fields/columns that are to be displayed (see Select Columns and Define a View on page 553 for more information). You can also save sets of columns as Views that you later can choose from the Select a View drop-down.
- **Advanced Expression** - opens a window with a text field where you can write SQL code. This allows you to use more advanced combinations in your search (see The Advanced Expression Window on page 552 for more information). When you define an expression, save it then click **Search**. The advanced expression will be used to provide the search result. A text in the upper row of the window will inform you "Advanced expression in use" when an expression is active, and "No advanced expression" when none is in use.
- **Clear Advanced Expression** - removes the Advanced Expression from the search.

18.4.1.1. The Advanced Expression Window

The Advanced Expression window allows you to use SQL code to create a search expression to extract specific respondents. Note that you should have some knowledge and experience of SQL to use this window. To create an advanced expression:

1. In the Edit window, click **Advanced Expression...**.

   The Advanced Expression window opens.

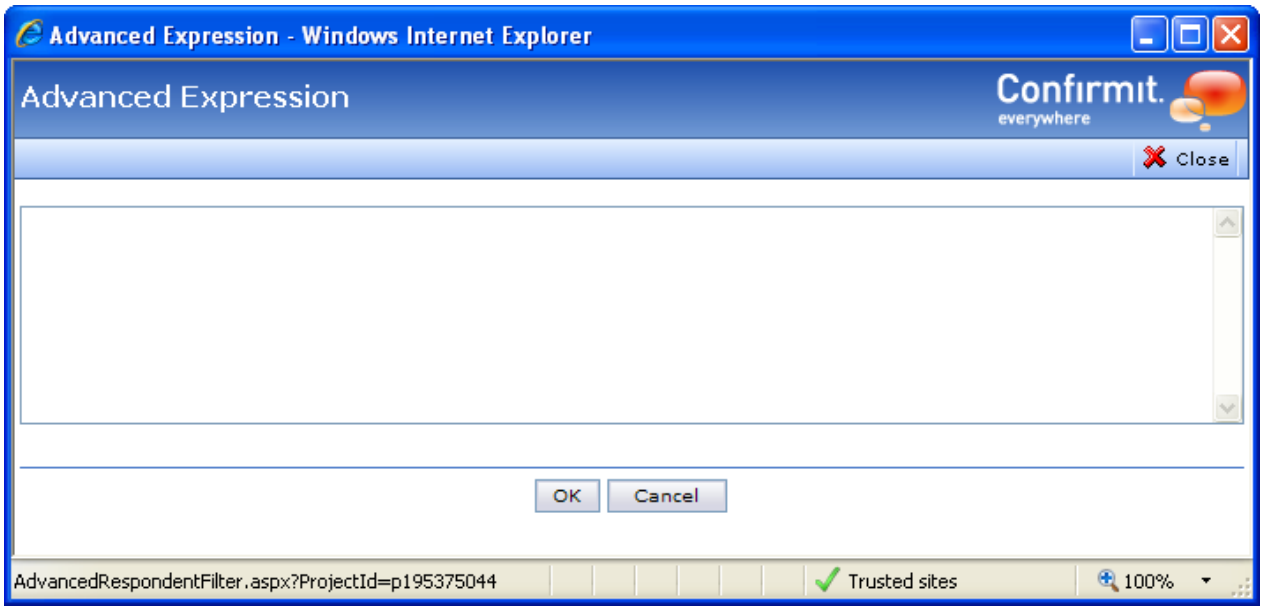


Figure 593 The Advanced Expression window

2. Click into the text field and type the SQL code for the expression.
3. On completion, click **OK**.

The following are some examples of the SQL code you could use to achieve the stated results. The syntax used is SQL. SQL reserved keywords are written in upper case, and % = wildcard.

Desired result	Example of code
Display all respids with a blank email address	email IS NULL
Display all respids that don't have a blank email address	email IS NOT NULL
Display all respids with an email address that starts with 'as'	email LIKE 'as%'

Desired result	Example of code
Display all respids with an email address that doesn't end with somecompany.com	email NOT LIKE '%somecompany.com'
Display all respids where noOfEmailsSent is 0	noOfEmailsSent = 0 or noOfEmailsSent LIKE 0
Display all respids where noOfEmailsSent is not 0	noOfEmailsSent != 0 or noOfEmailsSent NOT LIKE 0
Display all respids where noOfEmailsSent greater than 0	noOfEmailsSent > 0
Display all respids where noOfEmailsSent less than 2	noOfEmailsSent < 2
Display all respids where noOfEmailsSent is greater than 0 and less than 5 (1,2,3,4)	noOfEmailsSent > 0 AND noOfEmailsSent < 5
Display all respids where noOfEmailsSent between 1 and 4 (1,2,3,4)	noOfEmailsSent BETWEEN 1 AND 4
Display all respids where noOfEmailsSent is 0 or 1	noOfEmailsSent IN (0,1)
Display all respids that haven't yet started their interview	respid NOT IN (SELECT respid FROM response_control)
Display all respids that have Status 'complete'	respid IN (SELECT respid FROM response_control WHERE status = 'complete')

It is also possible to combine several statements, for example:

Desired result	Example of code
Displays all respids where email does not end with somecompany.com or email2 is blank and where noOfEmailsSent is 1,2 or 3.	((email NOT LIKE '% somecompany.com') OR (email2 IS NULL)) AND (noOfEmailsSent BETWEEN 0 AND 3)

18.4.2. Select Columns and Define a View

When you enter the Respondent Data Editor for a survey for the first time, the respondents are listed with the "respid" displayed. No other system or user-defined fields are displayed. If you want to display all or some of the system and user fields, you can choose these fields in the Select Columns table.

To define which columns/variables are to be displayed:

1. Click the **Select Columns** button.

   The Select Columns pop-up window opens showing Available Items (all system fields and all user fields), and Selected Items. By default, all items will be displayed in the Available Items list, meaning that these columns are currently not displayed in the Respondent Editor view.

   To add the variables/columns to the Selected Items list:

2. Either double-click the variable in the Available Items list, or select the items by ticking the checkbox next to them and clicking the **>>** button.

   When you want to remove the items from the Selected Items list, follow the same methods, but click the **<<** button if you choose the items by ticking the checkbox.

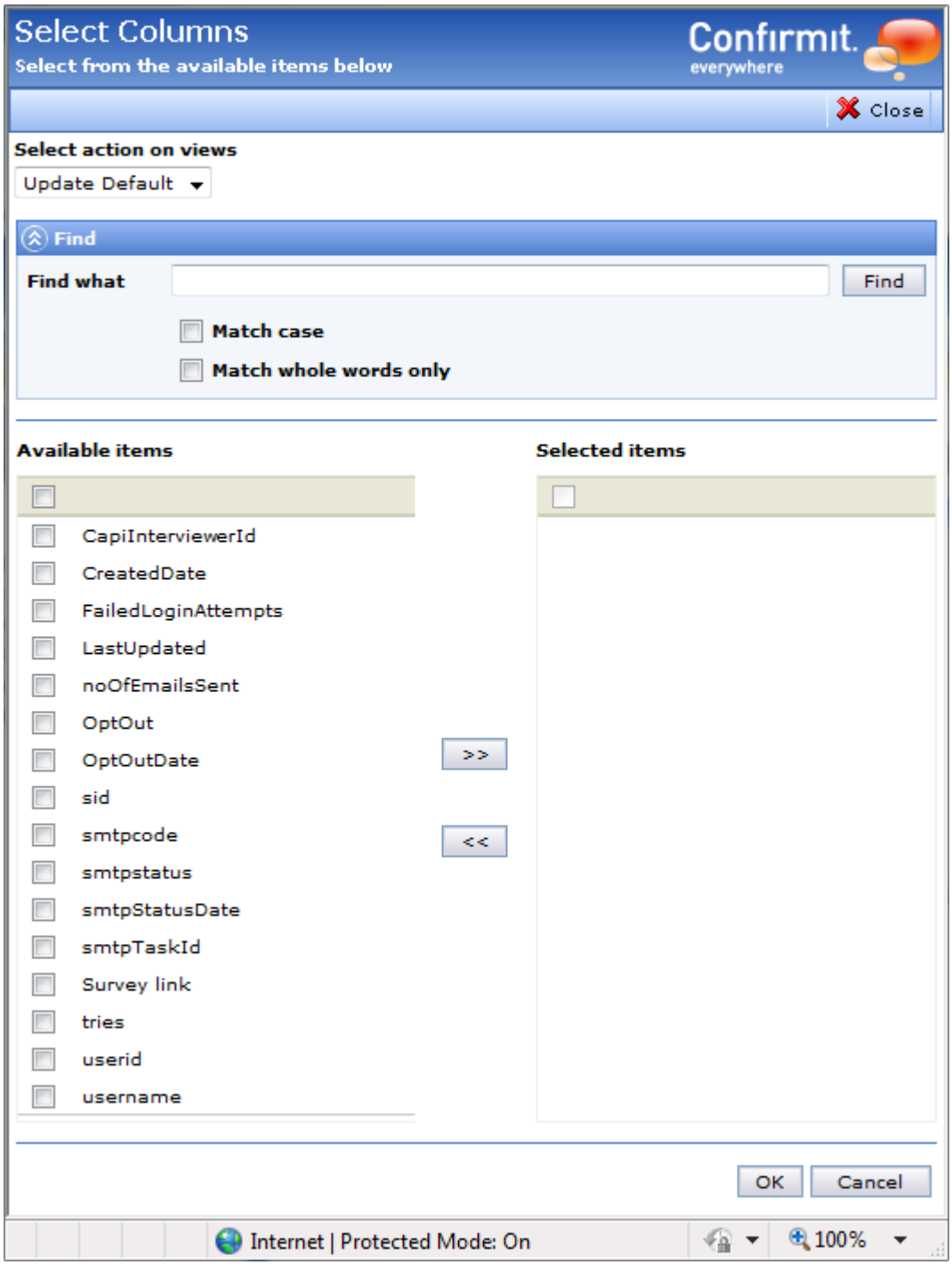


Figure 594 Selecting Available items

If the list of Available items is very long, you can search for items using the “Find what” field.

3. When you have moved the desired fields over to the “Selected items” list, leave the “Select action on views” drop-down on “Update default” and click the **OK** button.

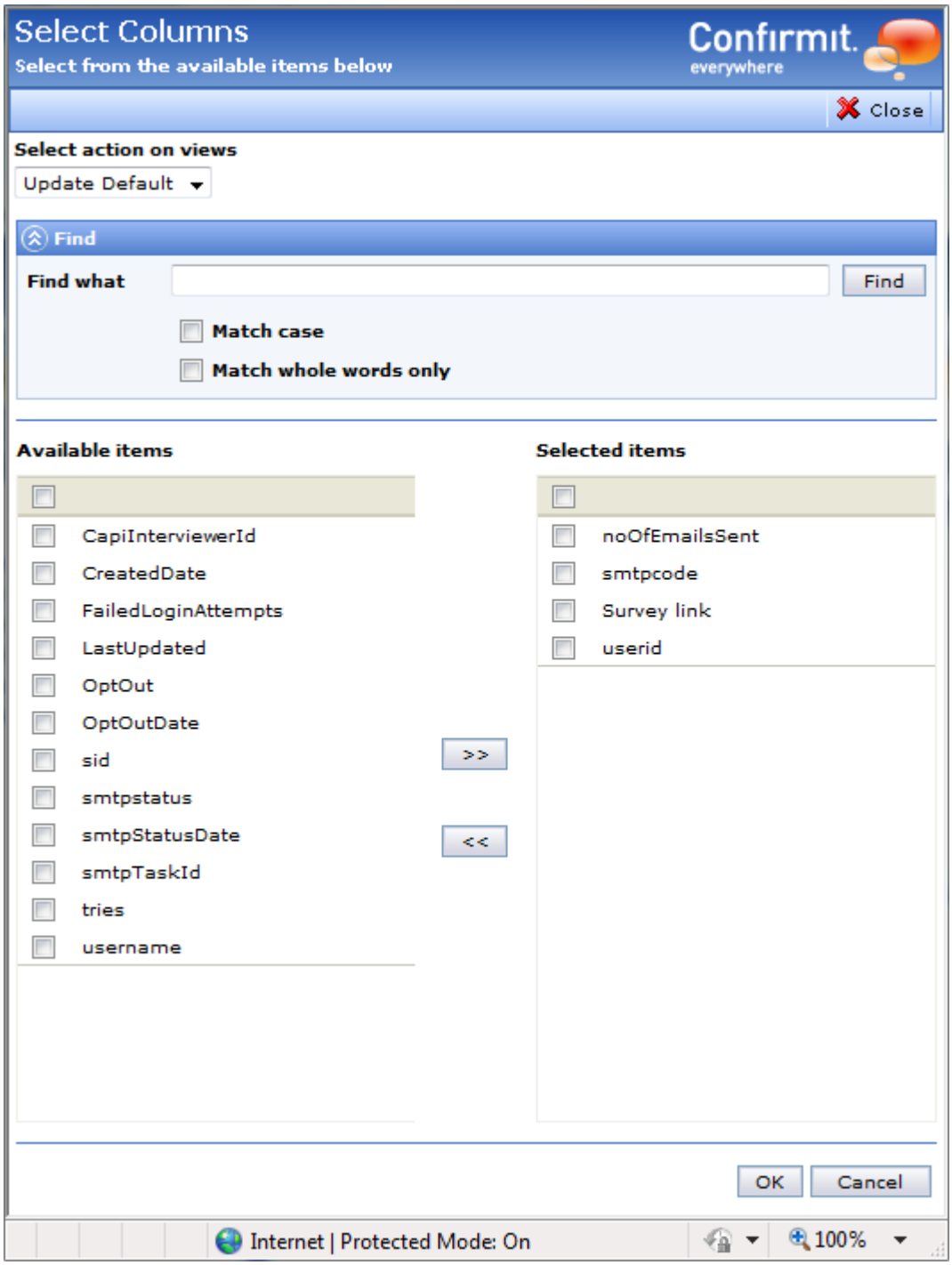


Figure 595 Some fields selected

All the fields selected will appear as search fields in the main Respondent editor window.

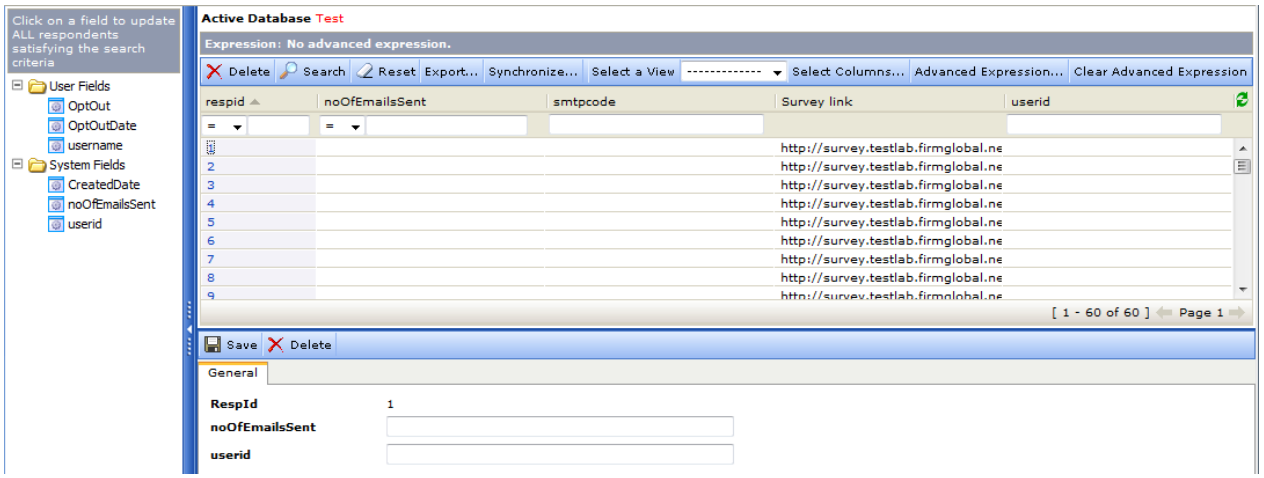


Figure 596 The selected columns shown In the main window

In some cases you may wish to use different views depending on the information that you wish to display. To avoid adding and removing items numerous times via the Select Columns window, you may define these selections as predefined views. To save a column selection as a View, when in the Select Columns window, go to the **Select action on views** drop-down and select **Save As New**.

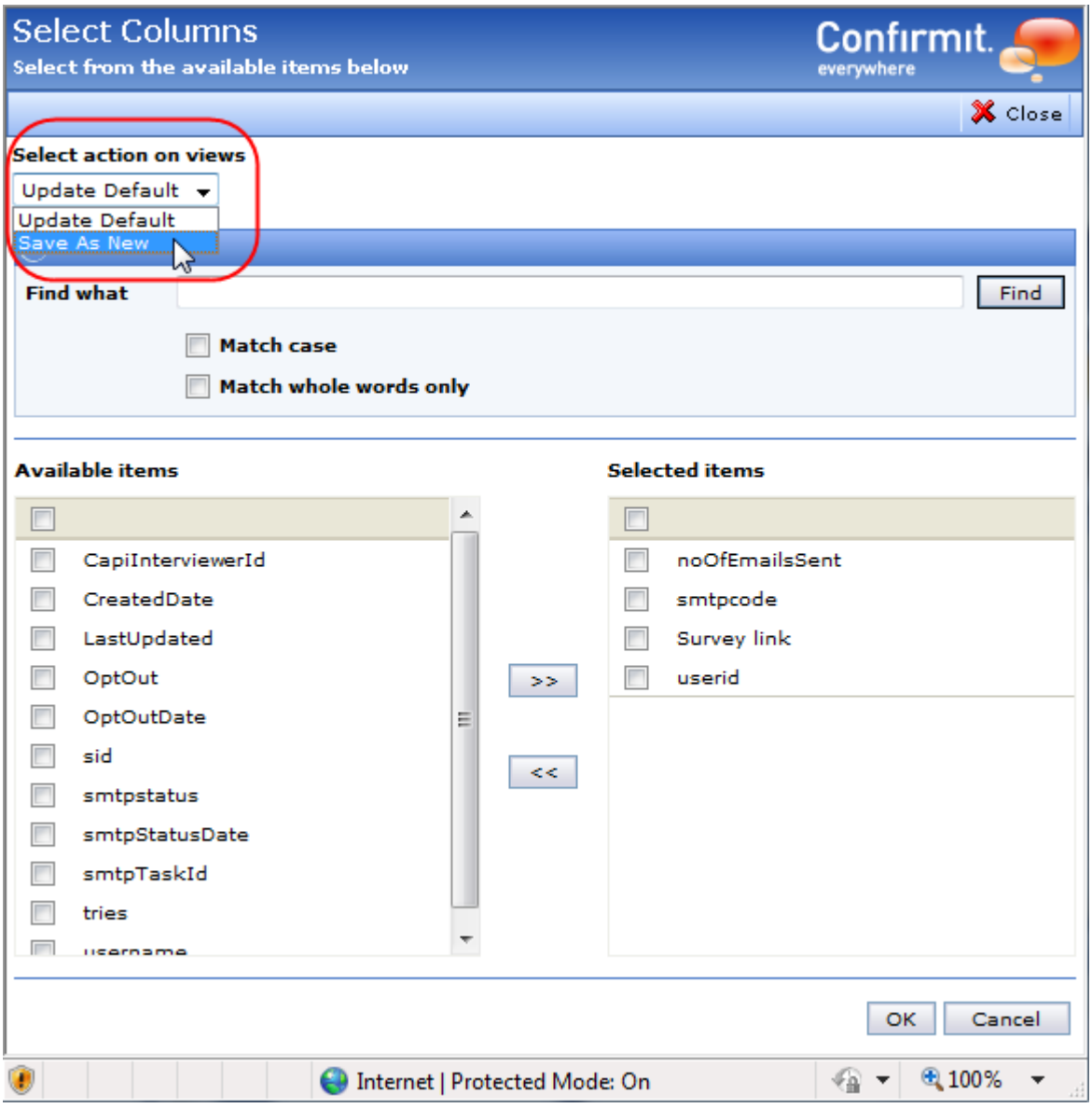


Figure 597 Saving a new View

When you select the **Save As New** item, a text field will appear next to the drop-down. In this text field, enter the name that you want to give the current view.

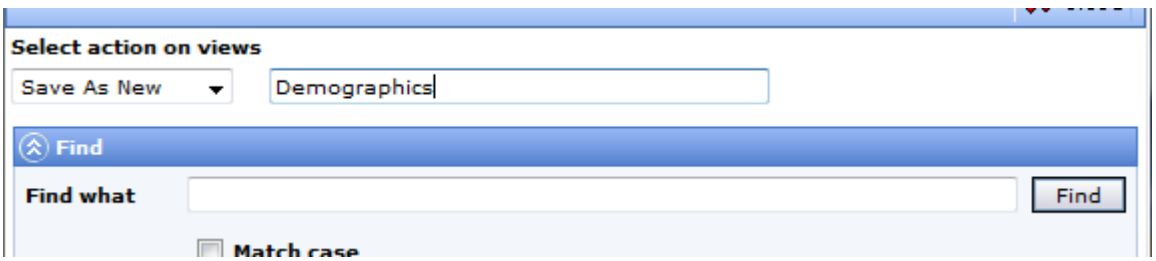


Figure 598 Naming the View

The views you create can later be updated and deleted as necessary by choosing either **Update Existing** and changing the fields, or by choosing **Delete** in the Select Columns window for a View.

The views you define will be available in the “Select a view” drop-down in the main window. When you select a view from the drop-down, the columns specified in that view will be displayed.

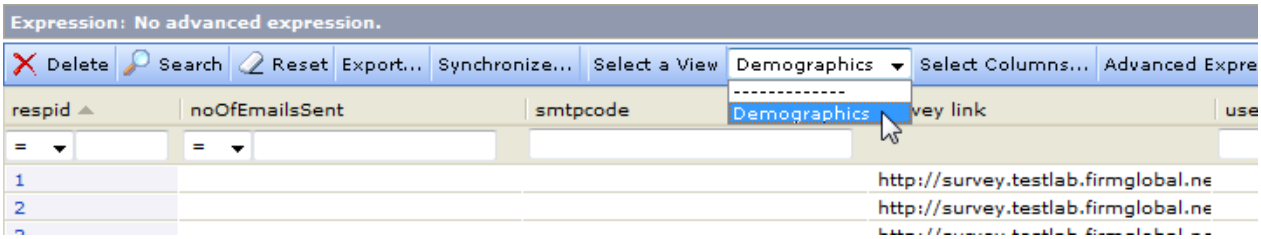


Figure 599 Example of the Select a View drop-down

18.4.2.1. The Survey Link Column

The Survey Link column shows the URL that has been or will be sent to the respondent. The complexity of the URL will depend on the "Encrypt system request parameters" property setting in the **Designer > Survey Settings > General Options** tab.

When the "Encrypt system request parameters" property is unchecked, the security ID (sid) is added to the Survey Link "as is"; that is, the 8-figure sid is added directly to the URL.

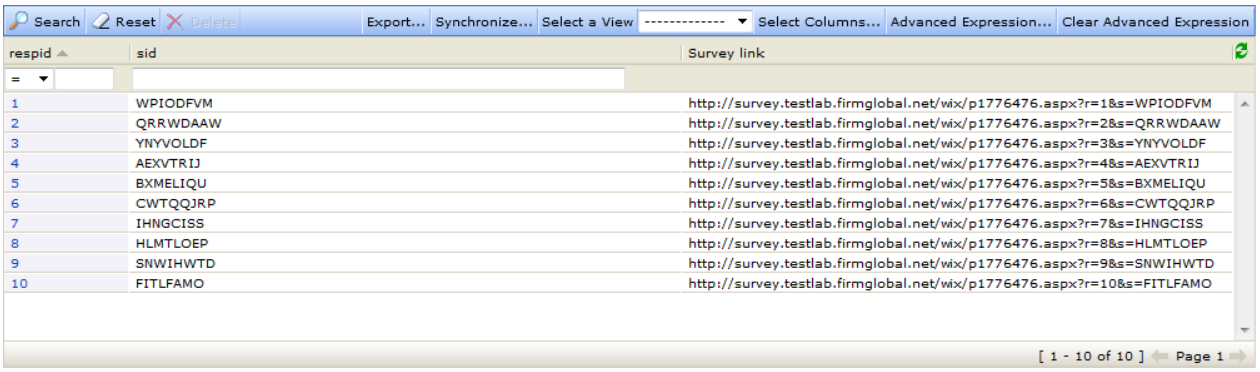


Figure 600 Example of Survey Links when the Encrypt system request parameters property is unchecked

When "Encrypt system request parameters" property is checked, the 8-letter security ID is encrypted to a long string of number, upper case, lower case and sign characters before it is added to the URL. This will obviously be far more difficult for an intruder to hack. For new surveys, the default value for this property is "checked".

Note: You are strongly recommended to leave this property box checked.

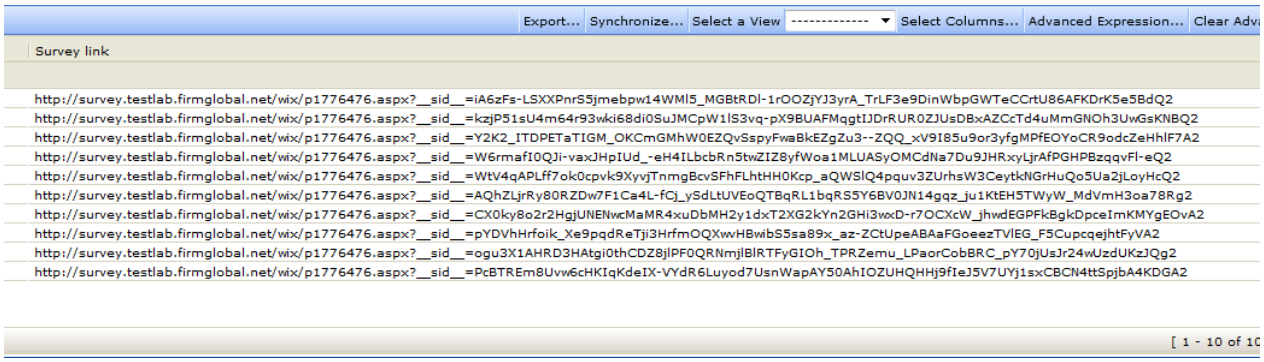


Figure 601 The Survey Links for the same respondents when the Encrypt system request parameters property is checked

Note that when the "Encrypt system request parameters" property is changed, the survey must be re-launched for the change to take effect.

Due to new product releases and system updates, the encrypted sid generated for a particular respondent may differ to one created previously. That is, Confirmit does not guarantee that encrypted sid generation will always be identical for the same respondent over time. Also, Confirmit does not guarantee that the length of the encrypted sid value will remain constant; it could be longer or shorter depending on a number of factors. However Confirmit does guarantee that any changes introduced will not cause previous encrypted sid values to stop working. So even if the latest encrypted sid for a respondent is different and/or a different length, the old encrypted sid value will still work.

18.4.3. To Search

To conduct a search, write search criteria into one or more of the fields and click the **Search** button. Confirmit will then display only those records that match the criteria you have typed into the fields. To change the search, edit and/or remove the criteria in the field(s) and click **Search** again.

If nothing is written in any of the search fields when you click the **Search** button, all respondents in the database will be listed. Use the % character as a wildcard.

Click the **Advanced Expression** button to open a window in which you can write advanced SQL search code (see The Advanced Expression Window on page 552 for more information). This enables you to create more advanced combinations in the search. The text “Advanced expression in use” or “No advanced expression” will be displayed in the window title bar as appropriate (see below).

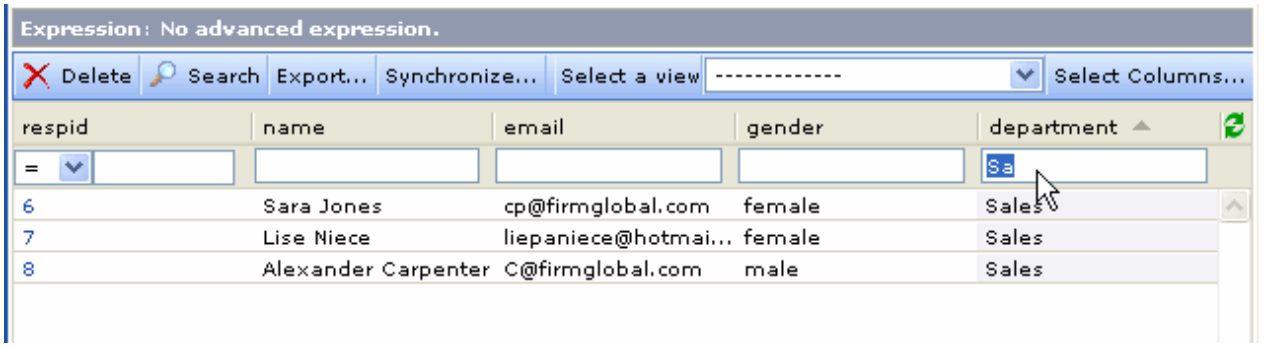


Figure 602 Conducting a Search

You can sort the respondents by clicking on the column/search field headings.

18.4.3.1. Respondent Export

When a search has been performed and the system returns a set of respondents, you can export the search result. To start the export:

1. Click the **Export** button.

   The Export Properties window opens.

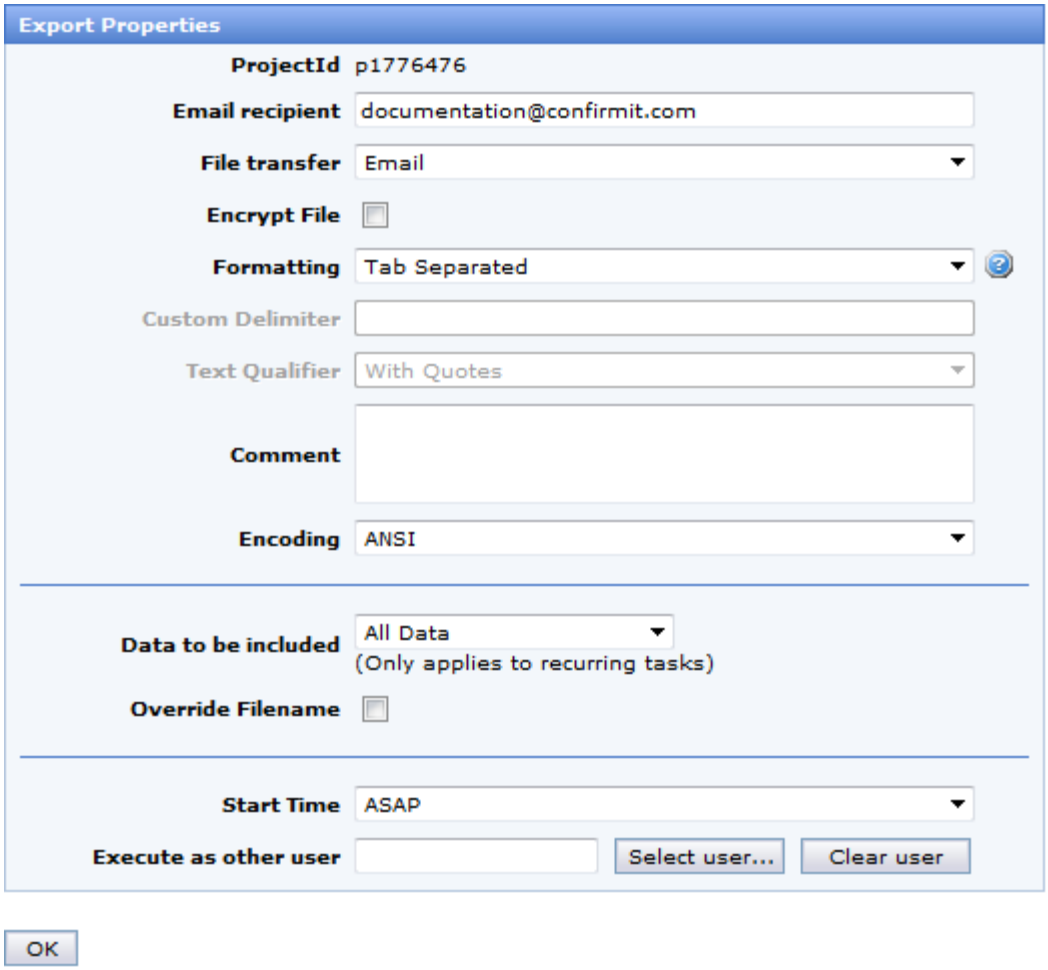


Figure 603 Example of the Export Properties window

The properties and options are as follows:

- **Survey Id -** the identification number of the survey you are currently working on.
- **Email recipient –** this is the email address (default the current user) to which the email will be sent when the export is completed.
- **File transfer** - export files can either be sent by email or placed on an FTP server. FTP is the recommended option for large volumes of data, since emails with large attachments may be blocked. FTP can allow automation of data flows, since files can then be picked up automatically by another system/process. Note that your company must license the FTP add-on for this option to be available.
  - o **Email -** If you wish to export the file via email, then select this option. The email will be sent to the address specified in the Email Recipient field.
  - o **FTP** - if your company has licensed the FTP add-on and it has been enabled, this option will be active. You can then send the file to Confirmit's FTP location. Type in the file name. Confirmit's FTP address is specified as part of the enabling procedure and cannot be changed. Note that exporting to FTP can allow automation of data flows since files can then be picked up automatically.

  - **External FTP -** [only available via the FTP add-on] this option enables files to be sent to an external FTP location. In this case the Folder Name (at the external FTP location) and the Host Name, and the FTP User name and Password must be specified. The **Verify connection** button is provided to allow you to check whether the FTP settings are correct.

- **Encrypt file -** data transfer encryption functionality makes it possible to perform secure data exports from Confirmit. The encrypted files can then be either ordered by email or sent to the FTP server for downloading. The users will have to decrypt the files using their private PGP encryption keys.
- **Formatting** - the format to be used for the file to be exported.
  - **Tab separated -** the columns in the file are separated by tabs.
  - **Comma separated -** the columns in the file are separated by commas.
  - **Custom -** a different character has been used as the separator. Type the character that has been used as the delimiter into the Custom Delimiter field.
- **Text Qualifier -** this property is available when you select Formatting as Comma separated or Custom. In these conditions, the separating character has a special meaning; it is used to separate the different values from the different variables. However some texts to be exported may include punctuation. Specifying quotes around texts ensures that any punctuation does not corrupt the file layout.
- **Comment -** type a comment in here to be added to the export email.
- **Encoding –** choose the appropriate encoding when sending emails in Unicode languages.
- **Data to be included** - Once a respondent has replied to a survey and that response data has been included in an export file, that data will in many cases not change. For recurring data exports, much of the data exported will therefore merely be a repeat of earlier exports. This option allows you to select whether you wish to export all the available data or only those records that have been added or modified since the previous data export task.
- **Override Filename -** allows you to override the system-generated file name. Tick this checkbox to open the file name text-box, where you can edit the system-generated name (see APPENDIX F: EXPORT FILENAME DYNAMIC VALUES on page 866 for more information).
- **Start Time -** specifies when the task is to be added to the task list. Select either Immediately ("ASAP") or "Schedule for later execution". In the latter case the Task Settings page opens, where you specify when the task is to be executed and you can set it up as a recurring task.

Note: In the event the user has the necessary permissions, they can perform the export as a different user. The "Execute as other user" field is then available below the Start Time field (see Executing Rules as Other User on page 827 for more information).

2. Make the appropriate settings and click **OK**.

   The export file is a Tab delimited ASCII file with field names in the first row. This file will be zipped, attached to an email, and sent to the address specified in the Email Recipient field.

Note: Data Transfer Encryption and FTP is an Add-On (see Data Transfer Encryption and FTP on page 6 for more information).

18.4.4. Update Data and Delete Respondents

There are two ways to edit the respondent data.

- Update field(s) for one respondent at a time
- Update sets of fields/data

To update data for one respondent at a time:

1. Click the respid of that respondent.

   The details page of this respondent is displayed in the lower frame with the search fields as shown below.

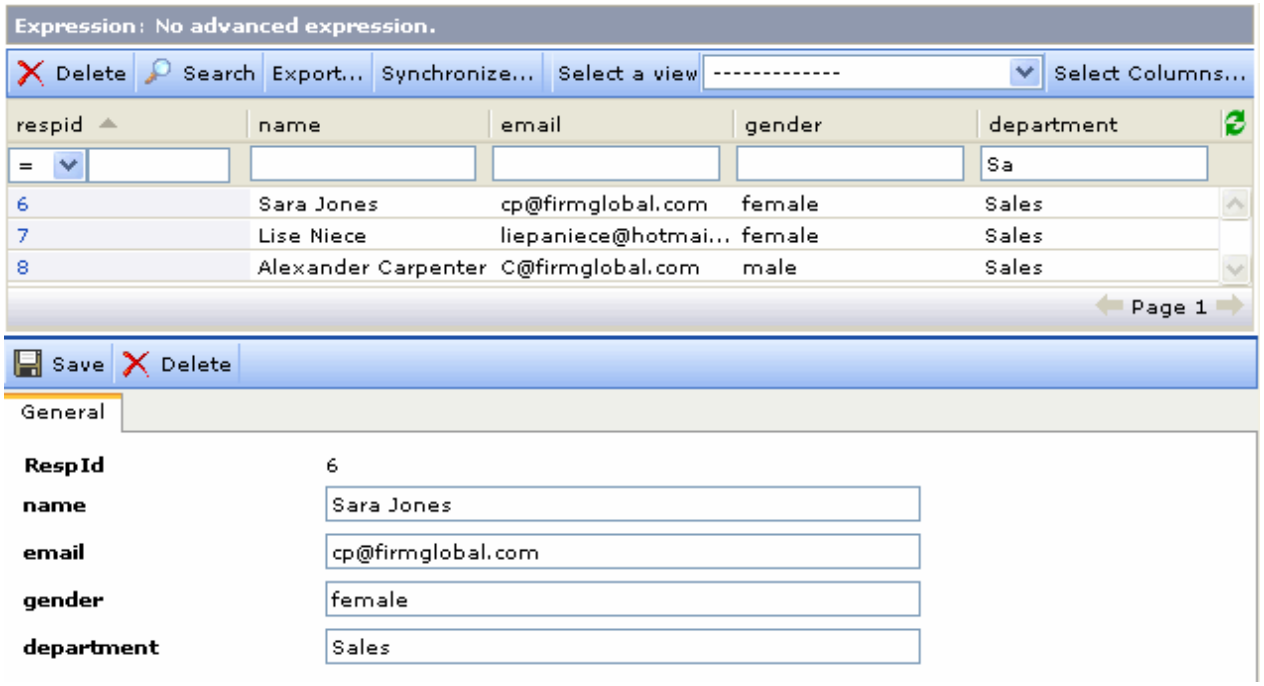


Figure 604 Updating respondent data

2. Make the desired changes in the fields available.
3. Click **Save**.

To delete respondents:

1. Select the respondent you wish to delete.
2. Click the **Delete** button in the LOWER part of the window.

   A dialog box appears asking if you really want to delete the respondent. If you confirm the deletion, the respondent is deleted from the respondent table. Note that it is not possible to retrieve a deleted respondent. However if the respondent has answered the survey his or her answers to the questions in the survey are not deleted.
3. **Confirm** the deletion or **Cancel**.

Important: Editing and deleting respondent data in this window changes or removes the data from the respondent table in the database. It is not possible to retrieve this data again. So proceed with caution.

Note: The "Delete" button at the top of the page deletes the entire set of data that has been retrieved in the search. To delete or update only the selected respondent in the set, use the "Delete" or "Save" buttons in the lower frame of the screen where this respondent's data is displayed.

For CATI-enabled surveys:

For CATI-enabled surveys, the number of respondents that can be deleted simultaneously is limited to 20,000. If you attempt to delete more than 20,000 respondents via **Respondent Data > Edit**, you will not be allowed to and the message below will appear. You then need to apply an appropriate filter to reduce the volume, and run the deletion procedure as many times as necessary.

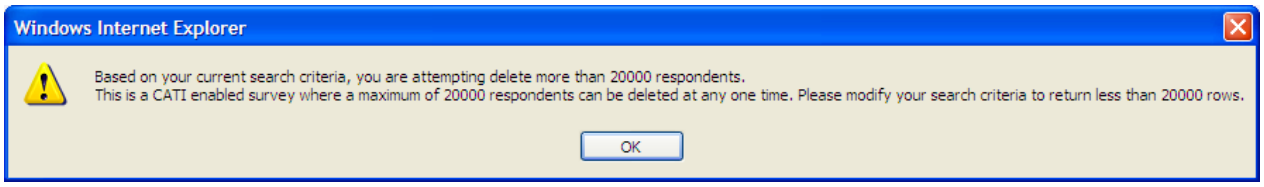


Figure 605 Warning message for attempted excess deletion

To update sets of respondent data:

1. Make a search such that only those sets of respondent information that you wish to update are listed.
2. In the left frame, click the variable you wish to update.

   A pop-up widow opens showing the name of the field with the current variable.
3. Type the new value of the variable into the field and click **OK**.

Note: Ensure you have the correct search result before you update the responses.

Example:

In the figure below, the search for respondents belonging to the Sales department has returned three names. Assume that we wish to change their department to Professional Services. To achieve this, click once on the “department” field in the User Fields folder.

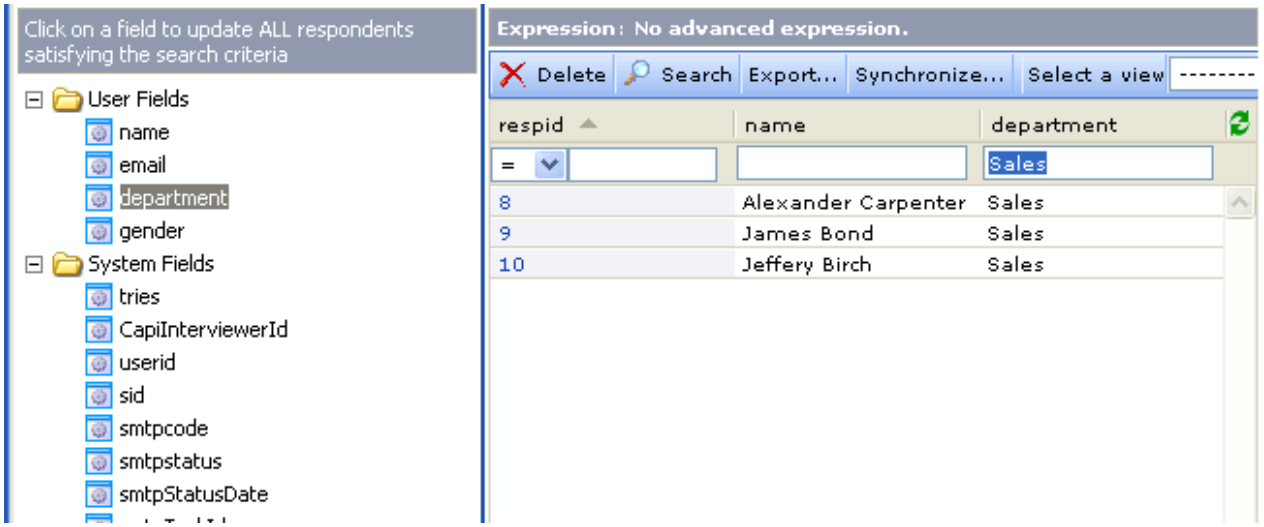


Figure 606 Updating Sets of Respondent Data - 1

A pop-up window opens. This pop-up window shows the name of the field (department) and a text box. Type the new value of the variable, in this case, “ProS”, into the field and click **OK**.

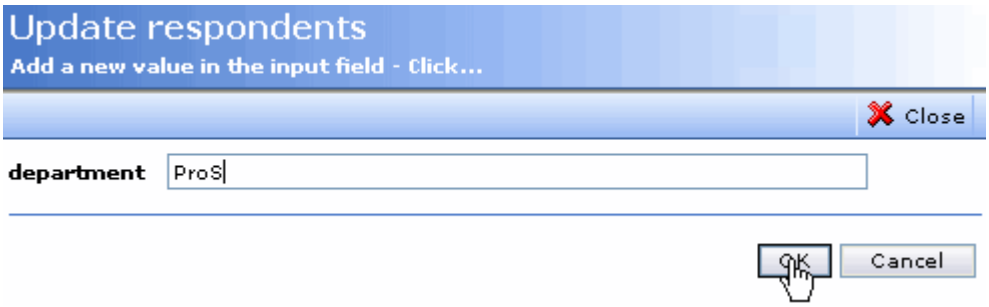


Figure 607 Updating Sets of Respondent Data - 2

A warning message is displayed asking you to confirm that you want to update this set of respondents. Once the change is performed, the main window will update, displaying “No items available because the value of one of the fields was changed.

18.4.5. Synchronization

The synchronize functionality allows you to update and/or append records from the respondent list into the response data. This can for example be useful in the following scenarios:

- If you have to make changes to background variables after data collection has started and some respondents have answered the questionnaire. These respondents will then already have data in the background variables in the response data set. Background variables in response data will not be affected by changes performed in the respondent editor. To have the changes applied to records already in the response data, you can update these variables with the synchronization functionality.
- If you want to include all records from the respondent files into the response data to be able to report on total response rates. As reporting is done only on response data (not including respondent list), you can use the synchronize functionality and append records from the respondent list that are not already in the response data.

Note: These records will be given the status "incomplete", and it will then for example not be possible to search for them in the email system as "Not answered". Existing records will retain their current status.

- Confirmit Individual Reporting functionality can be utilized as an entry point to interviews. This is done by using individual reporting to search through the records, and then when a record is selected in the hit-list, the single view is opened for that particular respondent with the unique URL to the survey for that record/respondent. Individual Reporting is only performed on response data, so to be able to search for respondents who have not answered the survey, the records have to be appended using the synchronize functionality.

Synchronization is only performed on the respondents resulting from your search in the respondent editor. The only variables that will be populated are the system identifiers **respid** and **responseid**, and the variables you have included in respondent editor which are defined as background variables in the survey.

In the event the task is set to be Recurring, you can synchronize all the data or you can synchronize only data that has been changed since the previous synchronization. Set the Data to be included property as appropriate.

Example:

In this example, assume we want to update the background variables "name" and "email" in a survey. When you click the **Synchronize** button, the Synchronization Properties window opens.

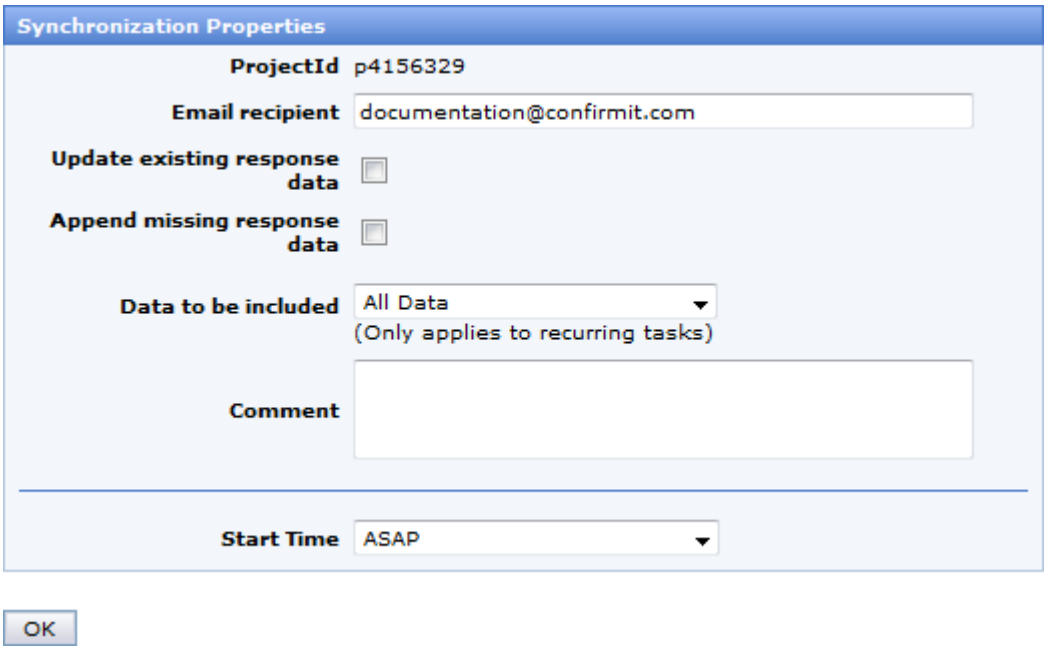


Figure 608 The Synchronization properties window

Check the **Update existing...**box to update those background variables for respondents resulting from the search (in our case "email" and "name"), which are already represented in the response data.

Check the **Append missing...**box to add respondents resulting from the search, which are not in the response data, and insert data for those background variables.

18.5. Sending Email

Confirmit provides a powerful wizard for sending e-mails to web survey respondents. Based on several selection criteria, e-mails can be sent to all or a subset of the respondents to invite them to participate in a web survey or to remind them of a previous invitation. It is even possible to send “thank you” emails to respondents who have completed a web interview.

The wizard takes you through the following steps:

1. **Respondent selection** - select which respondents are to receive the email and how many emails are to be sent per batch.
2. **Email Setup -** specify the content of the email.
3. **Preview and confirmation -** preview respondents who match the selection criteria.
4. **Send e-mails -** start the process of sending the emails to the selected respondents.

To access the email wizard, go to the **Respondents > Emailing** menu command.

More information about the above steps is presented in the following sections.

18.5.1. Step 1: Respondent Selection

When distributing email invitations to a survey, you may choose either to use predefined emails, set up in the questionnaire in the email object (see Invitation and Reminder Email on page 307 for more information), or you can set up an email directly in the Emailing wizard.

Note: You may override the respondents' emails with emails from another column. For example instead of sending out reminders to those who have not answered the survey, the same link may be sent to another email address, for example the respondent's manager. The survey emails can also be forwarded to a person, for example the survey manager, in order to notify him/her that the survey has been sent out. The link to the survey will not be included in the forwarded email. No specific set names need to be given to columns with forward and override addresses.

Note: The noOfEmailsSent column will only show the number of emails sent to the respondents in the 'email' column.

To access the email wizard:

1. Go to the **Respondents > Emailing** menu command.

   The Selection Criteria page opens. Here you define which respondents are to be sent emails, how many emails are to be sent in a batch etc.

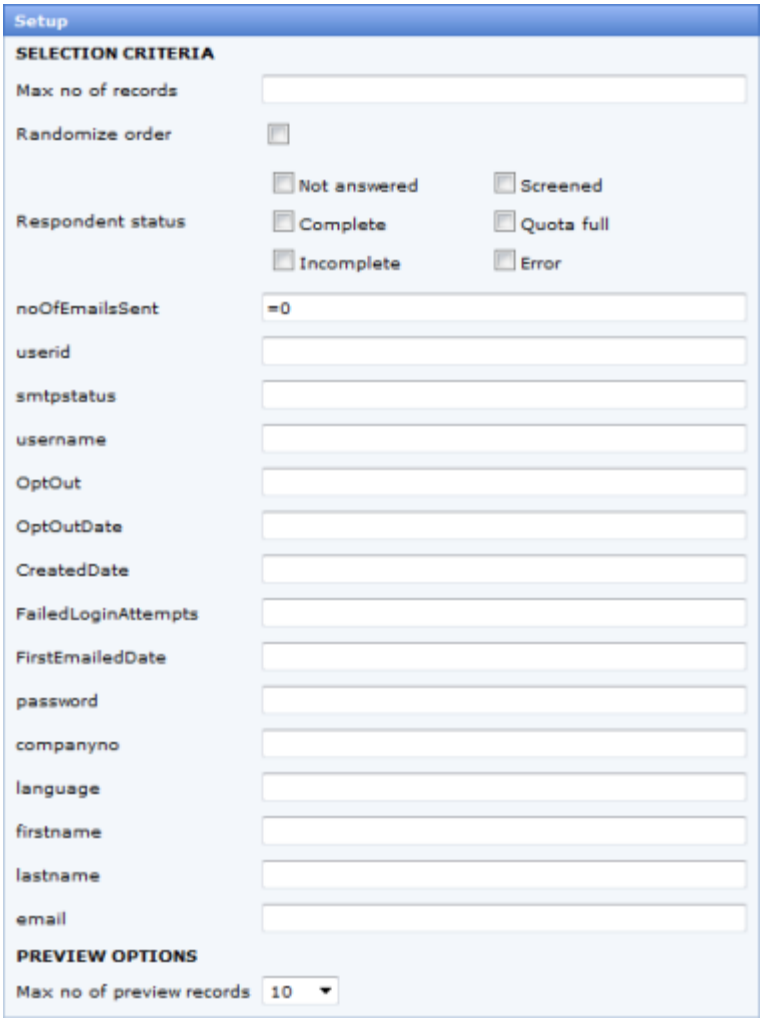


Figure 609 The Selection Criteria page

Note that the selection criteria displayed on this page will vary depending on the column names of the respondent file. All System fields and User fields will be presented under *Selection criteria*. Selections in the "text" fields must be made using SQL.

2. Make the appropriate settings in the various fields.

Click here for descriptions of the various fields and properties.

3. Click **Next**.

   Step 2 in the wizard, Creating the Email, opens.

18.5.1.1. The Selection Criteria Page Properties and Fields

Below are described the fields and properties available on the Selection Criteria page.

- **Max no of records –** Limits the number of emails sent in a single batch email. This in effect means that you can stage a large email job through Confirmit by setting up a recurring task that sends out a limited number of emails every hour until all respondents that match the remaining search criteria have received an email (for example by using max records and NoOfEmailsSent to break an email job for 50,000 emails into 5 tasks of 10,000 each).

  For example, you may have 50,000 respondents in the respondent database where NumberOfEmailsSent equals 0.

  - You set Max number of records to 10,000
  - You set NumberOfEmailsSent to =0
  - You set this task to recurr every hour.

  The result:
  Iteration 1 - Search will find 50,000 people, but send only to the TOP 10,000 people.
  Iteration 2 - Search will find 40,000 people, but send only to the TOP 10,000 people.
  Iteration 3 - Search will find 30,000 people, but send only to the TOP 10,000 people.
  Iteration 4 - Search will find 20,000 people, but send only to the TOP 10,000 people.
  Iteration 5 - Search will find 10,000 people, and send to the TOP 10,000 people.

- **Randomize order -** when not checked, the respondents are selected ordered by respid. This means the first-loaded respondents will always be selected first. When this box is checked, the respondents are ordered by the internal Sid value. This is useful if you filter the list of respondents with the intention that only a subset should be mailed.

- **Respondent status –** Chooses respondents based on the status of the interview, see below.

  - **No selection –** All respondents will receive the email.
  - **Not answered –** All respondents who have not yet entered the survey.
  - **Complete –** All respondents who have completed the survey. (Useful for sending “Thank you” e-mails).
  - **Incomplete –** All respondents who have started answering the survey, but have not yet completed it.
  - **Screened –** All respondents who have the “Screened” status (see Stop-Nodes on page 282 for more information).
  - **Quota full –** All respondents who have been stopped due to a full quota (see Stop-Nodes on page 282 for more information)
  - **Error** - All respondents who have been stopped due to an error in the questionnaire.

- **Number of emails sent –** The number of e-mails sent to a respondent is recorded for each respondent, and can be used as a selection criterion.

  Other fields:e.g. “email” – The wizard displays all fields from the respondent list that may be used in selection. Type in criteria as appropriate to select the required respondents.

Note: The noOfEmailsSent column will only show the number of emails sent to the respondents in the ‘email’ column.

To make the selection abilities as flexible as possible, the selection criteria must be input in the *Structured Query Language (SQL)* syntax known from relational database queries.

Examples

Using Gender:

If the respondent data includes gender as a background variable, with codes 'M' and 'F' for male and female respondents, respectively, then the e-mail wizard will list *gender* as one of the available selection criteria. To select only male respondents, enter:

```
= 'M'
```

in the *gender* input field.

Selection based on a set of values is accomplished using the *IN* keyword. For example, select both male and female respondents using the criteria:

```
IN ('M', 'F')
```

in the *gender* input field.

Selecting respondents who have already received more than 2 e-mails can be accomplished by entering:

```
> 2
```

in the *noOfEmailsSent* input field.

All standard SQL keywords and operators can be used, such as *BETWEEN, <, <=, >, >=, <>, AND, OR, LIKE* etc. For example, if the respondent list includes **name** as a background variable, to find all respondents whose names start with 'B' enter:

```
LIKE 'B%'
```

Date fields:

Note: Sending emails is simpler from Survey Designer, so consider switching to Survey Designer. Refer to the Survey Designer User Guide for details of the procedures.

Say for example you want to use CreatedDate as a criteria for selecting the respondents that are to receive emails. Note that the data in the field must be in the format 'MM/DD/YYYY'. To select all respondents created after 10th of August 2020, Enter:

```
>='8/10/2020'
```

If you have a question with a date format and you want to include that question in your emailing criteria, you can for example have a criteria such as:

```
=0 AND datediff(day,q1, getdate()) = 0
```

where q1 is the ID of the question you wish to use in your criteria.

A similar formula can be based on CreatedDate by replacing the above AND datediff(day,q1, getdate()) = 0 with

```
AND DATEDIFF("day",'YYYY-MM-DD',CreatedDate)>0
```

Note that if you combine criteria, they will be combined by AND.

- In the **Preview Options** field, you can specify the maximum number of respondents that will be displayed in the preview list in step 2 of the e-mail wizard. This is merely a precaution when working with large sets of respondents.

18.5.1.2. Fixed Sender Domain and Email Delivery Report Functionality

All Confirmit SaaS customers have access to the Fixed Sender Domain and Email Delivery Report functionality. This functionality reduces the risk of emails being treated as spam, and gives users the option to see the status of sent emails through the Email Delivery Report (see Email Delivery Report on page 578 for more information).

This means that if you are working in the SaaS environment, you will by default have either the "@us.confirmit.com" or the "@euro.confirmit.com" sender domain in the **From** field when you send emails via **Respondents > Emailing**. You can manually override this fixed sender domain by typing another sender domain into the Email, but you should be aware that in these cases 1) incomplete Email Delivery Reports will be generated, and 2) the emails are more likely to be interpreted as spam by recipient servers because the sender email domain will not match the sender server domain.

When using the default fixed sender domains “@us.confirmit.com” or “@euro.confirmit.com”, you can still receive feedback from respondents when they reply to your email. To receive reply mails, you will have to specify a valid email address in the **Reply to** field.

Note that "Out of Office" replies will always be sent to the From address according to the emailing standard.

Note: Customers using Confirmit SaaS environments who have specified their own fixed sender domains, will keep these domains.
On-Premise clients must license the Premium Emailing add-on to access this functionality. On-Premise clients should contact their Account Manager for further information.
This functionality will not work in Lotus Notes; only the email address will be displayed.

Read more about the Email Delivery Report functionality in the Email Delivery Report section.

18.5.1.3. Mail Merging Functionality

Information from all columns in the respondent table can be included in the body text of the email. To merge a background data field into the body text, for instance the respondents’ email address, write:

```
^email^
```

referring to the uploaded email column (it must be written exactly as the column label).

It is possible to display the link to the survey within the email text by simply referring to it as follows:

```
^slink^
```

or

```
^secureslink^
```

for secure links.

This will be http or https depending on the survey setting.

- Ensure that **^slink^** and **^secureslink^** are not used as background data.
- The references **^slink^** and **^secureslink^** should always be written on a separate line to ensure the link is never broken over two lines - if this occurs the link will not function.

Note: On-Premise Customers must configure the site to support HTTPS to enable the ^secureslink^ option.

The primitive **^surl^** can be used if you wish to resolve only to the url itself; it will not be contained within html tags as a link etc. This primitive allows you to create for example a clickable image link. If the survey setting “Enforce https access to survey” is enabled the ^surl^ link will begin https, otherwise it will be http.

The primitive **^slinkquerystring^** returns only the querystring part of the survey URL (after the ? character), without the hostname/domain. This allows the user to add the hostname/domain part of the address separately, thereby allowing more dynamic URLs to be constructed. This would be useful for example when the user want's to send a survey from several domains (different clients) while using just one invitation email template.

So if the full survey URL is
https://survey.euro.confirmit.com/wix/p12345678.aspx?__sid__=Bx6Y1u_5T9qh.....NdU652cryDl2A2

Then ^slinkquerystring^ will return **__sid__=Bx6Y1u_5T9qh.....NdU652cryDl2A2**

18.5.1.4. Avoiding Unnecessary Respondent Inquiries

To avoid unnecessary failure messages and inquiries from respondents when running limited Web-surveys, Confirmit strongly recommends that you include the following information in the e-mail body text:

- Read the following before you enter the survey!
- In the event you cannot access the survey by simply clicking on the link, cut (copy) – and – paste the link into the Internet address window. Make sure it is on one single line and without any spaces.
- Navigate forwards and backwards in the survey by clicking on the **>>** and **<<** buttons, or just **>>** if the back button is disabled. Do not use the browser's “**Back**” and “**Forward**” buttons as your answers may not then be saved!

- If you are not able to move on to the next page, you may have forgotten to answer all the questions on the page. Look for an error message.
- Use the link in the e-mail message when you wish to continue responding to the survey after a pause. Do not bookmark the survey page!
- The link is unique to you! Do not send it to other respondents.

If you are including the unique links to the survey at the bottom of the email message by checking the *Include link* flag, ensure that the mouse cursor is at the beginning of a new line. You will then prevent the link to the survey merging with the body of your email message.

18.5.2. Step 2 - Creating the Email

1. Once you have made all the appropriate and/or necessary settings in step 1 of the email wizard, click **Next** to go to step 2.
2. If you have predefined email objects in the current survey, they will be listed in the **Email** drop-down - choose the email to be sent. Otherwise, select **Create new email** to open the Text tab so you can write and set up a new email.

   The Create Email page then opens as shown below.

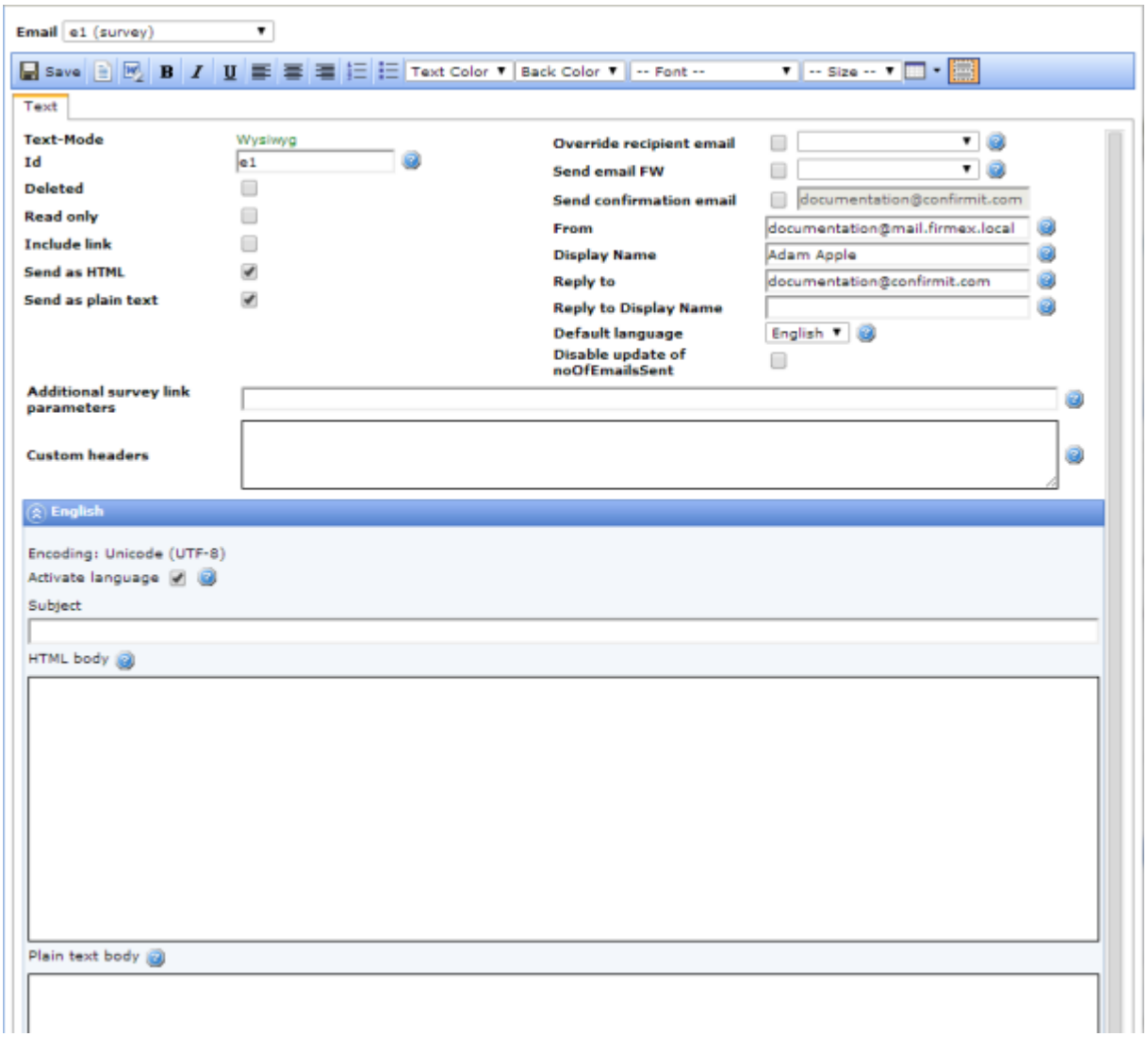


Figure 610 The Create Email page

Note that HTML and Plain Text email text fields are presented for each language selected for the survey, so you can send the email in the various survey languages.

Note: Any emails you set up directly here in the Emailing Wizard and save, will be saved in the survey and will be accessible for to you to use on later occasions.

Note: You can also set up emailing tasks for later execution, before corresponding respondents are uploaded into the database.

3. Once you have selected or created the required email, set up the properties.
4. Click **Next** to go to step 3 in the wizard.

18.5.2.1. The Email Details Page Properties and Fields

- **Id** – displays the name/title of the current email object. The default values are “e1”, “e2”, etc. You can enter more descriptive titles.
- **Deleted** – will be chosen if the email object is soft-deleted. If you uncheck the Deleted option, the email object will be undeleted.

- **Read only** – choose this setting if you want the email object to be locked so that no changes are made to it accidentally, either in questionnaire editing mode or when sending email in **Respondents > Emailing**.
- **Include link** – check this box to have a link (URL) to the web interview included automatically at the bottom of the e-mail (default).
- **Send as HTML** – check to send the email as HTML code. Only mail clients that support HTML will be able to read the email.
- **Send as plain text** – check to send the email as plain text. Most mail clients will be able to read it.

  The email object will have two text fields for each language: one for HTML body and one for Plain text body. When sending email to respondents, you can choose to send the email either in one of those formats or in both in one sending. When you choose to distribute the **email in both formats**, the mail clients supporting HTML will use the HTML version, other mail clients will display the text version.
- **Override recipient email** – the respondents' email addresses will normally be in the "email" column of the database. However you may also have 'secondary' email addresses in another column. This would allow you to send the same survey link to another email address, for example the respondent's manager's address in the event the respondent does not answer the survey. Check to override the respondents' email addresses with email from another column. You must then choose the column name from the drop-down. Note that you can disable the "No of emails sent column" - see below.
- **Send email FW** – select this option and select a column from the drop-down if you want to forward the survey email to a person, for example the survey manager, in order to notify him/her that the survey has been sent out. The link to the survey will not be included in the forwarded email.

Note: The noOfEmailsSent column will only show the number of emails sent to the respondents in the 'email' column.

No specific set names need to be given to columns with forward and override addresses.

- **Send confirmation email** – check this option if you want to receive confirmation email from the system, stating that the emails have been sent.
- **From** - this shows the email address from which the email will be sent, default will be the address of the currently logged on user - you. You can change this if required.
- **Display Name** - The value entered in this field will be displayed in the 'From' field in the email. If nothing is entered in this field, the recipient will see the email address/name entered in the **From** field. Specify a valid email address in the **Reply to** field. When the receiver clicks his/her 'Reply to' button, the email will go to this email address (see Fixed Sender Domain and Email Delivery Report Functionality on page 568 for more information).
- **Reply to** - specify a valid email address in this field. When the receiver clicks the 'Reply to' button, the email will go to this email address.
- **Reply to Display Name -** the name entered in this field will be displayed in the 'To' field when the receiver clicks the **Reply to** button. If nothing is supplied, the name entered in 'Display Name' will be used. For example, the 'Reply to Display Name' could be set to 'DO NOT REPLY'.
- **Default language** - if respondents do not have a language specified in the 'language' column in the respondent list, if their language is not activated with the **Activate language** setting, or if it does not exist in the current email, they will receive the email in the **default language** selected here. This list contains all the languages selected for the survey. If you set default language to 'None', respondents who do not match any of the activated languages, will not receive any email.
- **Disable update of noOfEmailsSent** - in the event you wish to prevent the email counter from registering the email transmission (for example you may be sending reminders to respondents' managers etc. - see Override Recipient Email above), check this box to disable the Number of Emails Sent column.
- **Additional survey link parameters** - allows you to add custom parameters after the survey link. An example could be:

```
http://survey.confirmit.com/wix/pXXXXXXXXX.aspx?__sid__=encryptedid&code=
1
```

where **code=1** is the additional parameter. This could previously be achieved by constructing the URL by piping in **^sid^**and **^respid^**, however this was not possible with encrypted system request parameters in the URL. This field allows you to include additional URL parameters in the survey link in email when using encrypted system request parameters. The field supports piping from the respondent list (with ^s). It works both for piped links (with ^slink^ or ^secureslink^) and when the "include link" checkbox is selected.

- **Custom headers** - use this field to add custom headers to the email. The syntax is:

  X-name:value

  X-name2:value2

  You can use piping to "personalize" the email. Here the syntax is:

  X-name:^pipedValue^

  These headers will be added after the internal Confirmit headers. Note that you cannot use the X-Confirmit prefix in custom headers.

- **Custom survey link text** - (located at the bottom of the page) allows you to insert clickable text instead of the survey URL in HTML email. Note that this applies only to HTML email. This could previously be done by constructing the URL by piping in ^sid^ and ^respid^, but it was not possible with encrypted system request parameters in the URLs. This field makes it much simpler to create a text such as "Click here to take the survey", or even include an image tag. The correct < a href=---> tag will be created in the HTML. This works both for piped links (with ^slink^ or ^secureslink^) and when the "include link" checkbox is selected.

In multilingual limited surveys, you can upload the respondent list with a column ‘language’ where each respondent’s language is specified (see Handling Respondents in Limited Surveys on page 540 for more information). If email subject and body has been entered and the **Activate language** property is chosen in the email object, the system will send email in the correct languages to the respondents. The system will automatically select the Encoding that has been assigned to a language on the server.

18.5.2.2. Text Substitution

You can "personalize" the emails you send to your respondents by including the contents of a respondent list column, for example the respondent's name, in the email. To do this you use a form of text substitution using the ^ character. The exact code you will need to include in the email will depend on the column name in your respondent list that contains the required information. If for example your respondent list includes a column called “name”, which holds the full name of the respondent, then you can add the code **^name^** to the text of the email, as in the figure below.

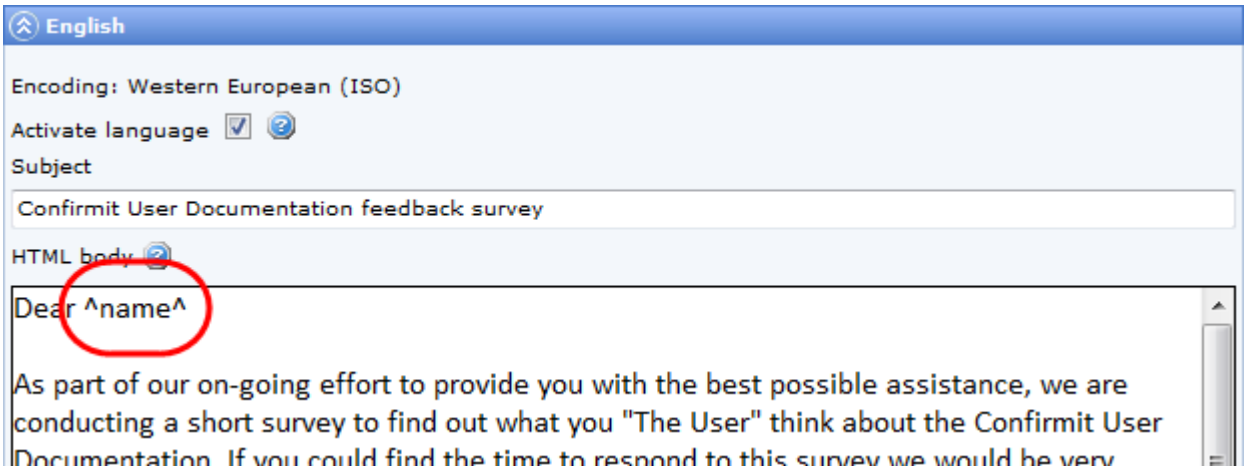


Figure 611 Substituting text in an email

Now when the respondent receives the email, it will read for example, “Dear John Smith”.

If your respondent list has several columns for the name information, for example “firstname”, “lastname”, “title” etc, then you could use the text **Dear ^title^ ^lastname^**, which will give e.g. "Dear Mr Smith".

The ^ character can be used in any of the fields in the email form, so you can for example add data from the respondent list into the Subject line.

18.5.3. Step 3 - Previewing the Email

In this step a preview list of respondents, based on the selection criteria entered in step 1, shows which respondents will receive an e-mail. This list is limited by the **Max no of records** setting from setp 1 in the procedure. In addition, a preview of the e-mail text is displayed, as shown below.

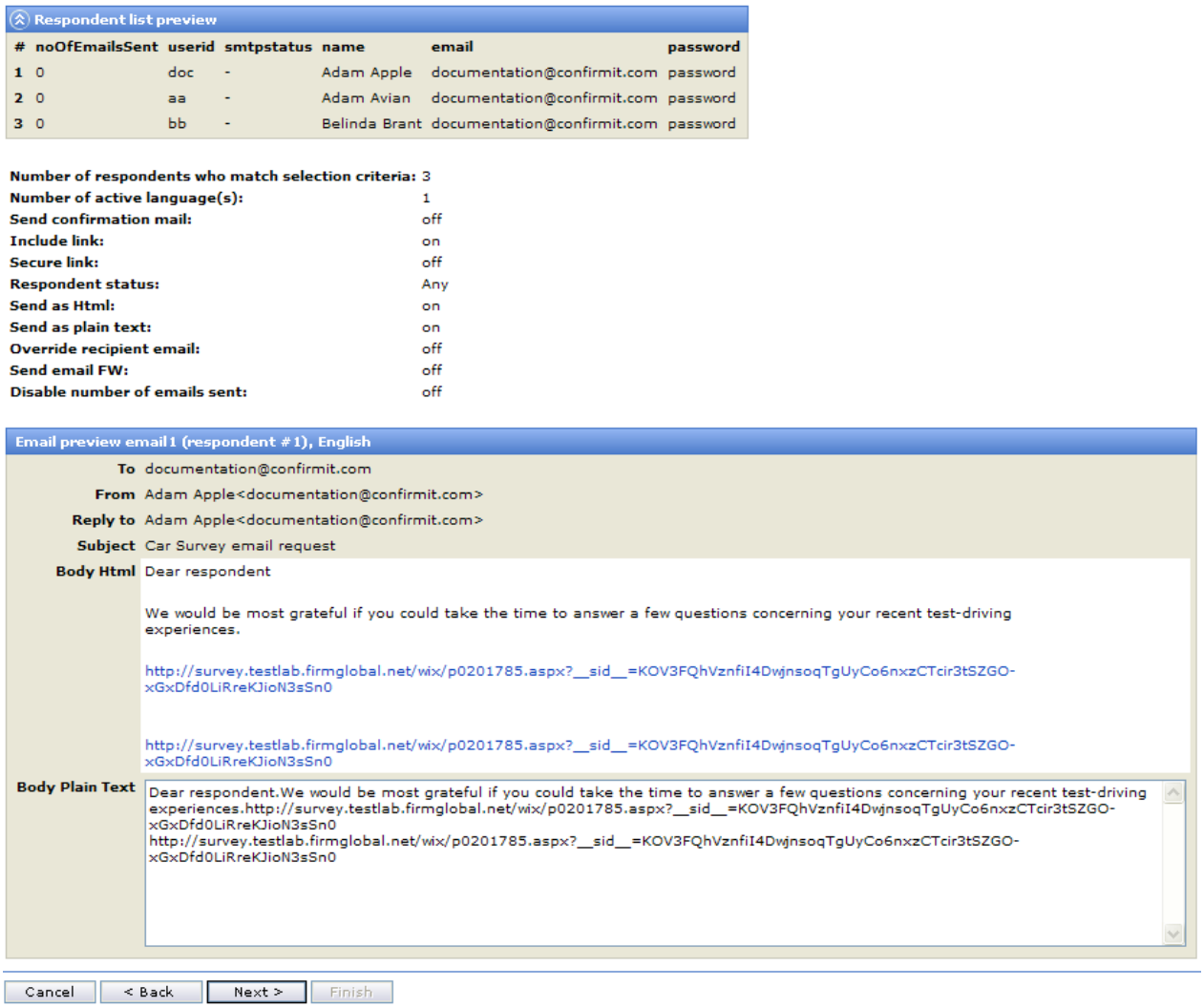


Figure 612 The Respondent and Email Preview page

1. Check the settings and the text(s) of the email.

   The Preview will be shown in the survey's default language. Change the language by going to the "Language" drop-down in the lower right corner of the Confirmit window.

2. Assuming everything is correct, click **Next** to proceed to the last step in the procedure.

18.5.4. Step 4 - Sending Emails

After you have previewed your email message and the respondent list, you can either click **Back** to make changes if necessary or, if you are ready to send the email, click **Next.** Clicking **Next** opens the Mail Task dialog shown in the figure below. Here you schedule when you wish your email to be sent out.

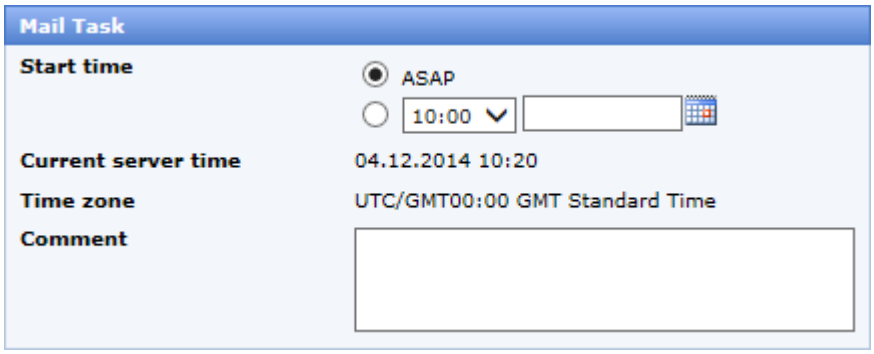


Figure 613 The Mail Task dialog

1. Select **As Soon As Possible** or specify a time for the task to commence.
2. Type a comment into the text field as required.
3. Click **Finish** to commence the task.

   This is the final step of the email wizard. At this point, the emails will be queued for delivery to the selected respondents. The Task Manager page opens, as shown below, where you can monitor the progress of your batch job.

When you send emails, a standard check is run on the email list - the message will not be sent to invalid addresses. Once the task has run, you will receive a mail from the system stating how many emails have been sent, and how many mails it has failed to send.

Note: If you plan to send the survey to test respondents first, and later overwrite this respondent list with the real respondent list, wait until the test emails have been sent out and you have received confirmation from the system before you upload new respondents and send the survey to them.

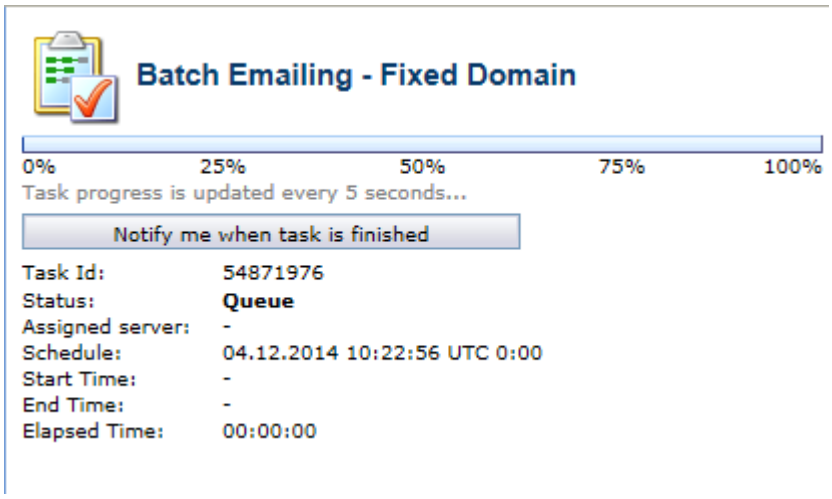


Figure 614 The Batch Emailing task Instances tab

A confirmation from the system will be sent to the address you have specified in your own User Settings, even if you have specified another sender address in the *sender* field. The subject and the email body of the sent emails will be included in the confirmation message.

18.5.5. Setting up Recurring Batch Emailing Tasks

You may need to set up a recurring task - a task that is repeated at regular intervals.

For example:

Assume you wish to send reminder emails to those respondents who have not answered or have not yet completed your survey. You can then set up the task such that it repeats every 2 days, selecting only those respondents who have not yet completed your survey. In this case, the first time you send reminders to those who have not answered the survey, proceed as follows:

1. In the Respondent status in Selection Criteria choose **Not answered.**
2. Fill the necessary information into the From, Subject, Body, etc. fields, or choose a predefined email.
3. Follow all the steps as described in the wizard procedures until the Mail Task page opens.
4. Set the **Start Time** to some point in the future as shown below, then click **Finish**.

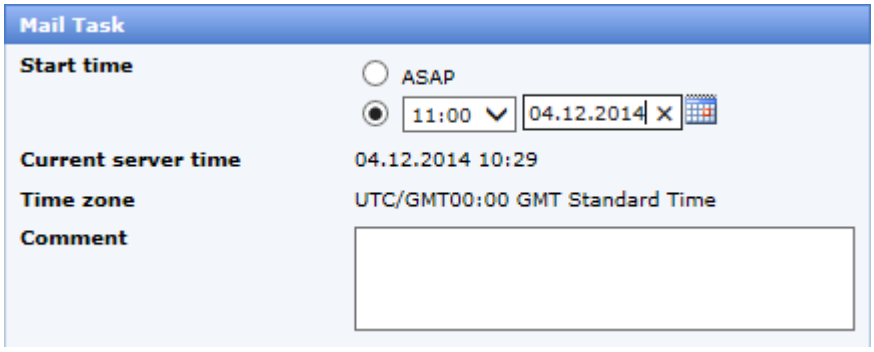
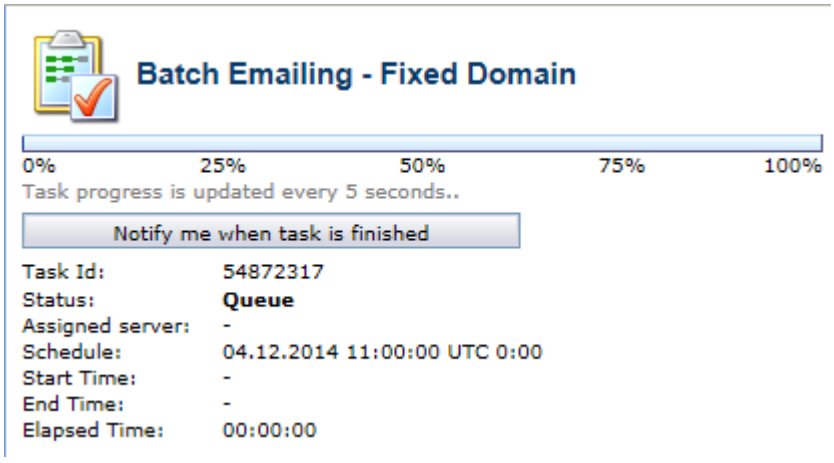


Figure 615 Setting up the recurring Mail task

The Batch Emailing page opens, and a task will be added to the Tasks list.



5. Go to the Tasks item in the Quick Access pane, find the task you wish to make recurring, and click on its blue Task ID link.

The Batch Emailing overlay opens at the Instances tab.

6. Go to the **Recurrence** tab and click **Change**.

   This opens the Recurrence property setup page.

7. Set the time and date when you wish the tasks to start.
8. Set **Recurring Task** to **Yes**, and select the required repetition rate.
9. Set an End date, after which the task will stop running.

.

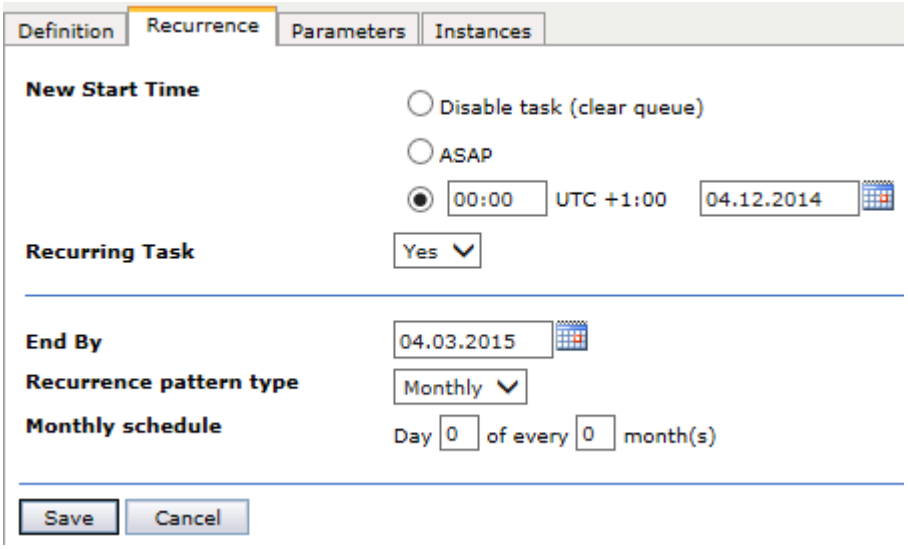


Figure 616 The Recurrence Pattern for the job

10. Click **Save** to save the changes.

    The tab now shows the dates and times of the scheduled recurrences.

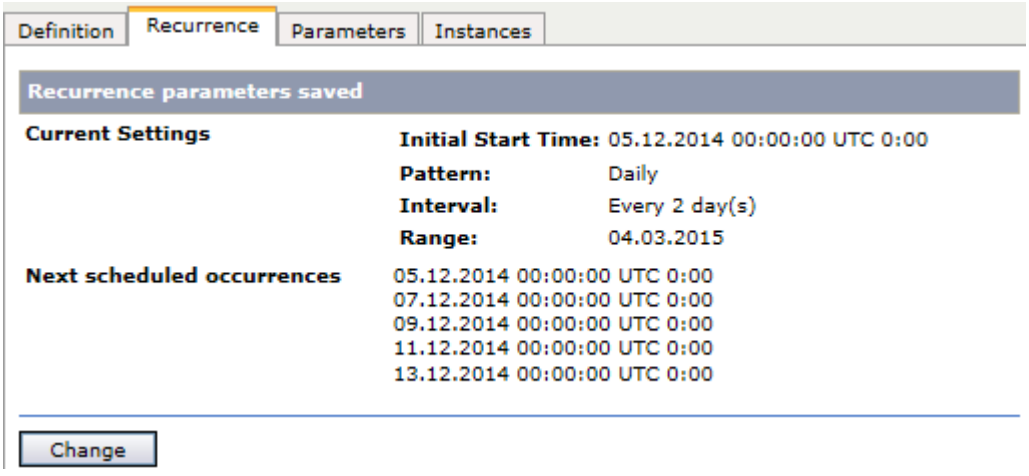


Figure 617 The Recurrence Parameters dialog

Those who have not answered the survey will be sent a reminder each time the batch emailing is scheduled by the Recurrence pattern. Note that you can click **Change** at any time to go in and change the settings.

Note: If a user sets up a recurring task and at some point in the future while the task is still running the user's ID expires, the task be "Aborted by the system". The following error message will then be written to the task log - "Your account has expired. Please contact your system administrator." For assistance, contact Support.

18.5.6. Email Delivery Report

All Confirmit SaaS customers have access to the Fixed Sender Domain and Email Delivery Report functionality. This functionality reduces the risk of emails being treated as spam, and gives users the option to see the status of sent emails through the Email Delivery Report.

This means that if you are working in the SaaS environment, you will by default have either the "@us.confirmit.com" or the "@euro.confirmit.com" sender domain in the From field when you send emails via **Respondents > Emailing**. You can manually override this fixed sender domain by typing another sender domain into the Email, but you should be aware that in these cases 1) incomplete Email Delivery Reports will be generated, and 2) the emails are more likely to be interpreted as spam by recipient servers because the sender email domain will not match the sender server domain.

On-Premise clients must license the Premium Emailing add-on to access this functionality. On-Premise clients should contact their Account Manager for further information.

Note: There is no guarantee that Email Delivery Reports in Confirmit will at any time be 100% accurate. This is due to the nature of the SMTP email protocol and the way it is implemented around the world. A lot of ad hoc solutions exist, and there is no rigid rule-set that specifies which information a receiving email server is required to respond with to an email sending server. This results in that the SMTP code received from the recipient email server, which the Confirmit SMTP sinks use to build the status in Email Delivery Report, may either be non-existent, wrong, or interpreted differently by the Confirmit SMTP sink.

Due to the various implementation methods mentioned above, the Email Delivery Report can take up to one hour to be updated.

18.5.6.1. Tracking E-mail Status

When e-mails are sent from Confirmit, additional headers are added to the mail. These headers are then processed by Confirmit whenever the system receives a bounce-back.

When you have sent a survey invitation, you can later go to the Email Delivery Report and check the delivery status.

1. Go to the **Respondents > Email Delivery Report** menu command.

   If you have sent invitations only once, the page shown in the figure below appears.

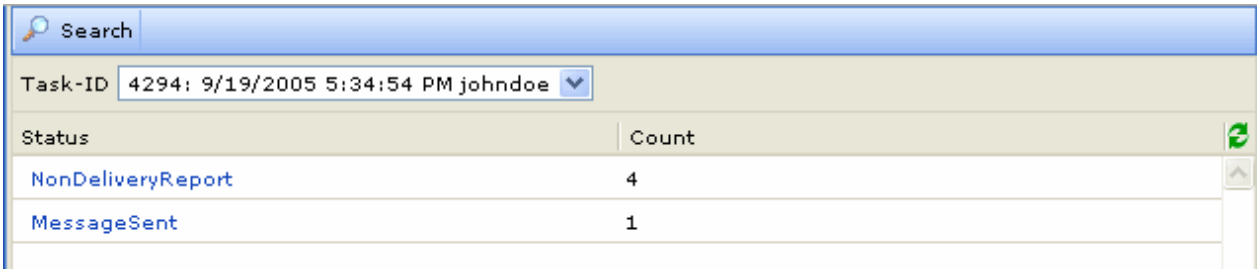


Figure 618 Email Delivery Overview

If you have sent invitations several times from the same survey, choose the Task ID of interest in the Task ID drop-down. This overview shows all the statuses that were registered for the particular emailing task, and how many respondents belong to each status. Note that only the status of the last sending per respondent will be at any time registered and displayed in the Email Delivery Report.

The following statuses are logged:

- **BadMail –** the SMTP server could not send the message because the email address is not valid.
- **Queued –** the email is in the sending server's out-going queue.
- **ServerResponse** - this is a transient status between Queued and the other statuses, and applies while the sending server is in contact with the receiving server but before the email is sent. When the email has been sent the status will change to MessageSent. If the sending server is then told that the email could not be delivered, the status will change to NonDeliveryReport. In most cases the ServerResponse status will be active for such a short time that you will not see it - if it is displayed for more than a few seconds then there is probably something wrong.
- **MessageSent –** the email was delivered successfully to the receiving server. Note that this is no guarantee that the email has been delivered to the users' email account, just that the receiving server has accepted it. An email will be given the status MessageSent when it successfully leaves the sending server, and will keep this status unless a Non Delivery Report is sent from the receiving server.
- **NonDeliveryReport –** the email was delivered by the sending server, but the receiving server has returned a Non Delivery Report. This can have several causes, for example the email address was not recognized by the receiving server.

2. To display the list of respondents belonging to a particular status, click the status link, or choose **Show Respondents** from the drop-down.

   The Respondent Editor interface opens. Here you can for example change the respondent's email address if this appears to be the reason for the Non Delivery Report, and resend the survey invitation.

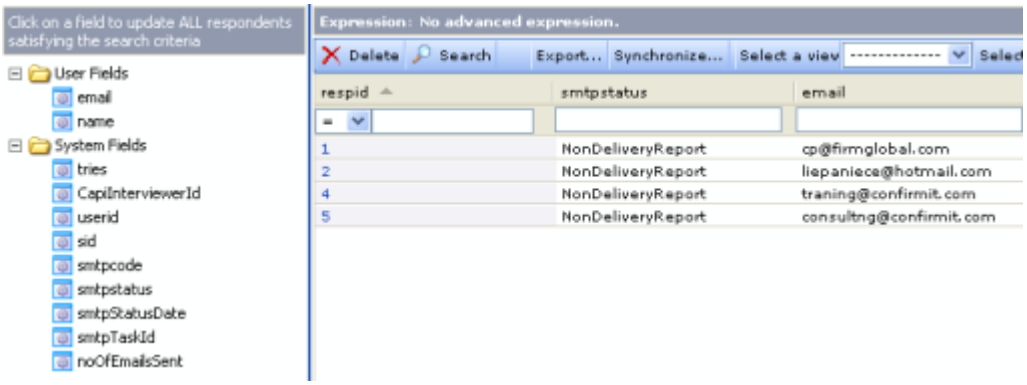


Figure 619 Respondent Editor

See the Respondent Data Editor section for further information.

18.5.6.2. Recurring Batch Emailing Tasks

Note: If you have Confirmit surveys for which you initiated recurring batch emailing tasks before the Email Delivery Report functionality was activated, then to see the Email Delivery Report results for these surveys you must deactivate the existing emailing tasks and set up new ones.

18.5.6.3. Using Your Own Domain on Confirmit's Server: Technical Setup

For Software as a Service (SaaS) customers to receive the Email Delivery Report and to achieve conformance to e-mailing standards, a valid domain name for e-mail dispatch is required. If you wish to use your own e-mail domain instead of the default, you must first obtain the domain (not from Confirmit), and then set it up towards the Confirmit e-mail servers.

Existing domains may be used, but as the e-mail domain record must be pointed towards the Confirmit e-mailing servers, this domain cannot then be used for any other purpose. For this reason it is recommended to set up a sub domain such as "*surveys.company.com*", which will be used as the sender e-mail domain, for example "*e-mail alias@surveys.company.com*".

The following steps are required to successfully establish your own e-mail domain to be used in Confirmit:

1. Obtain a valid domain for use as the base domain name and make the domain available on the Internet using a hosted DNS service or your own DNS servers.
2. Optional: If the domain is already in use create the sub domain that is to be used as the e-mail domain i.e. survey.domain.com
3. Add the MX records to the domain or sub domain that is to be used as the e-mail domain. To allow for fail-over should one server become unavailable, it is recommended to add more than one IP-address from different servers as the domain MX records, with different priorities. A full list of Confirmit IP addresses is published and maintained on the Confirmit Extranet:

   https://extranet.confirmit.com/library/saas-info.aspx

4. Test that the chosen domain name now has the correct MX records.
5. Notify Confirmit Support about your chosen domain. It will then be added to Confirmit as the default sender domain for your users.

Log in, then go to the **SaaS Tech Info** page.

Note: Contact Confirmit Professional Services support@confirmit.com for help with enabling your own sender domain.

18.5.7. Spam

Confirmit allows users to send e-mails to invite respondents to participate in surveys, to send reminders and to thank them for their participation. However, sending an e-mail to a valid address is no guarantee that the message will be delivered. A Fact Sheet detailing different causes for non-delivery is available from Confirmit's website at https://confirmit.com. In the following we will concentrate on measures introduced in Confirmit that will help to ensure that mails are delivered. The information is primarily addressed to Confirmit's SaaS clients, but the concepts presented herein also apply to On-Premise clients.

18.5.7.1. Minimizing Spam

To stop or minimize spam (unwanted commercial marketing e-mails), activities ranging from governmental regulations to local spam filters on the recipient computers are implemented.

For Confirmit users, three key areas are of particular relevance:

- **Legislation** - Government bodies in most countries have introduced laws regulating permitted ways of e-mailing. All users of Confirmit's SaaS Environment are required to abide by Confirmit's AUP, and by any laws and regulations applicable in any country in which they are operating. Clients operating on their own servers are recommended to follow similar guidelines.
- **Spam Filters -** Most spam filters (such as SpamCop) rely on "black-lists". By subscribing to a spam filter, a company can automatically screen away all incoming e-mails where the sending server is included in a black-list. The usual reason for a sending server being black listed is because a certain number of e-mail recipients over a short period of time have reported the e-mail as spam. At Confirmit we monitor black-lists continually, and have observed that recipients of survey invitations sometimes cause the Confirmit e-mailing servers to be listed for short periods of time. It is therefore important that e-mails from Confirmit are written such that they do not resemble spam, and that all recipients have agreed to accept e-mails.

Another triggering factor for e-mails being stopped in spam filters is when the sender address does not match the sender domain. This is the typical situation where a Confirmit SaaS client sends e-mails from his own sender address (for example *name@company.com*), while the sending server address is a Confirmit domain. This is considered as e-mail spoofing, a technique used by spammers, and can cause mails to be blocked. The solution is to send e-mails from domains that are registered on the Confirmit servers. See below for further information regarding this solution. When sending e-mails and using correct domain names, Confirmit may also support anti-spam solutions such as Sender ID and DomainKeys

- **Compliance with Standards -** E-mails should be sent in accordance with certain standards, and particularly relating to (1) e-mail format and (2) the technical setup. See the following section for more information about (2).

Confirmit addresses several of the issues relating to inconsistency between sender address and server domain. This is achieved by the introduction of the Activate sender domain/Email Delivery Report feature in Confirmit.

18.5.7.2. Avoidance of "Spoofing" Status

When sending e-mails, an additional header is put on the SMTP message. This header includes the address of the sending server. If this header does not match the address specified in the "*From*" field, it is called "spoofing", and many mail relays will classify this as SPAM and block it. The Fixed Domain functionality forces the "From" address to be the same as the one in the SMTP header, and the possibility of e-mails being classified as SPAM is reduced.

If you are working in the SaaS environment, you will by default have either the "@us.confirmit.com" or the "@euro.confirmit.com" sender domain in the **From** field when you send emails. You can manually override this fixed sender domain by typing another sender domain into the Email, but you should be aware that in these cases 1) incomplete Email Delivery Reports will be generated, and 2) the emails are more likely to be interpreted as spam by recipient servers because the sender email domain will not match the sender server domain.

When using the default fixed sender domains "@us.confirmit.com" or "@euro.confirmit.com", you can still receive feedback from respondents when they reply to your email. To recieve reply mails, you will have to specify a valid email address in the **Reply to** field.

Note that "Out of Office" replies will always be sent to the From address according to the emailing standard.

Note: Even if the Fixed Sender Domain/Email Delivery Report is activated, the Confirmit user can still choose to use another "*From*" (sender) address. In this case a warning will be displayed in Confirmit informing that this may cause the e-mails to be perceived as spam, and that the Email Delivery Report will be incomplete.

18.6. Handling Respondents in Multilingual Surveys

With multilingual surveys you must ensure that the respondents receive the survey in the correct language. There are several methods of controlling this for Limited and Open surveys.

18.6.1. Open Multilingual Surveys

There are two ways of ensuring that respondents receive the survey in a particular language:

- In open multilingual surveys you can have a Single question with the question ID ***l*** (as in **l**anguage) as the first question of the survey. You must then use the actual languages as the answer options, and the appropriate language codes (see APPENDIX B: CONFIRMIT LANGUAGE CODES on page 851 for more information) as the codes for those answers. For example, if your survey is available in English, French, German and Spanish, the answer options in the Single question will be "English", "French", "German" and "Spanish", and the codes for these answers will be "9", "12", "7" and "10" respectively. The remaining questions in the survey will then be presented to the respondents in the language they have chosen in the Language question.

Note: As the respondents must make this selection manually, the question "l" must be a normal question that the respondent sees. If it is hidden and set by a script it will have no effect and the respondents will see only the default language.

- Another option is to distribute survey links specifying language, to the countries the survey will be conducted in, for example:

  https://survey.confirmit.com/wix/pXXXXXXXX.aspx?l=9 (for English)

  https://survey.confirmit.com/wix/pXXXXXXXX.aspx?l=10 (for Spanish)

etc.

18.6.2. Limited Multilingual Surveys

With limited surveys, you may:

- Include a column with a tag *language*, which specifies the language each respondent will receive the survey in (see Preparing the Respondent List on page 540 for more information). The contents of the column must be Confirmit language codes (see APPENDIX B: CONFIRMIT LANGUAGE CODES on page 851 for more information).
- Include a Single question with the question ID ***l*** (lower-case letter L) in the survey, as mentioned in the previous section .
- In multilingual surveys with a login-page (see The Web Options Tab Properties on page 504 for more information) the respondents are presented with a drop-down where they can choose their desired language.

Note: If respondents are to be allowed to re-enter the survey, you must also give them the possibility to modify their answers after initial submission. This is because when the respondents re-enter the survey, the survey will be presented in the default language and the respondents must be able to re-select their preferred language.

18.7. Sending Email as a Standard User

If you are logged onto Confirmit as a Standard user and when deploying a survey you select one of the Survey Link by Email options, then you will also need to create a list of email address to which the survey link is to be sent. Once the survey is deployed you will be asked to invite the respondents.

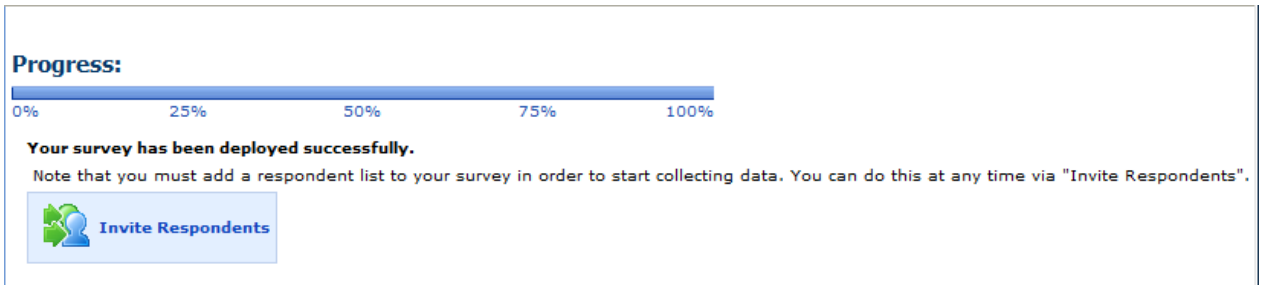


Figure 620 The survey is deployed and you now need to invite the respondents

1. If you are creating the list as part of the deployment procedure, click the **Invite Respondents** button. If you are creating the list as a separate operation, go to the **Respondents > Invite Respondents** menu item.

   In both cases, the Respondents page opens .

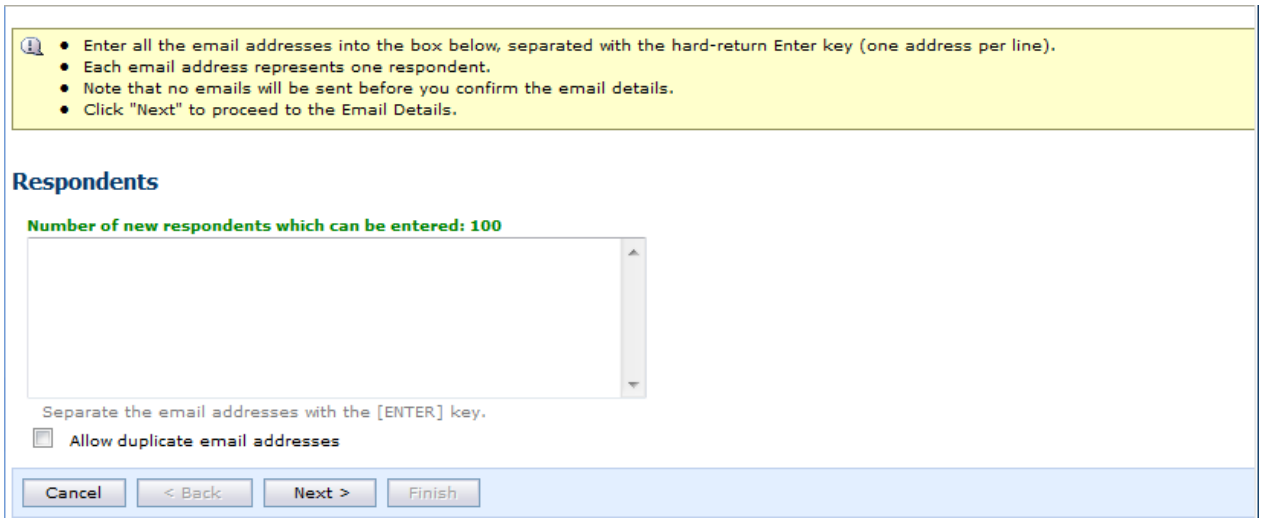


Figure 621 The Respondents page

2. Enter into the text field the email addresses of the respondents who are to receive the survey link.

   You can type the email address into the field individually, using a hard return (**Enter** on your keyboard) between each address, or you can copy a list into the field from for example an Excel file.

3. When the list is complete, click **Next**.

   The Email Details page opens. Here you can check the sender details and create the body of the email.

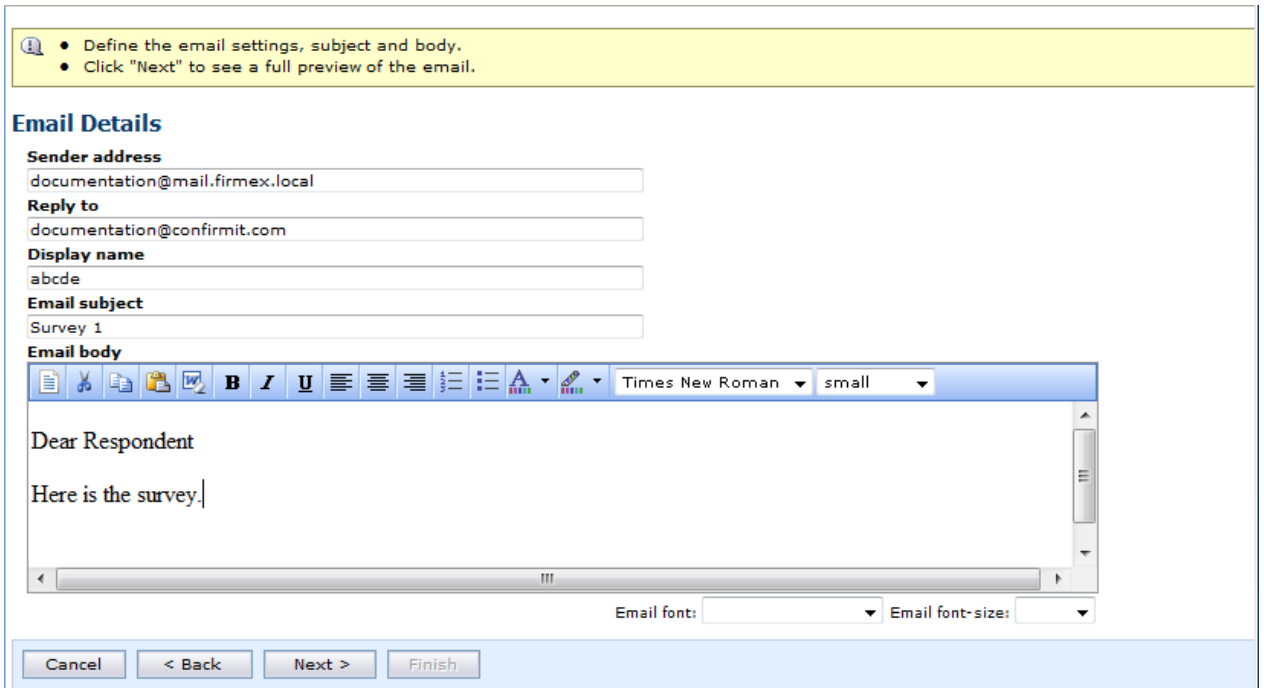


Figure 622 Example of the Email Details page

4. On completion, click **Next** to go to the Preview page.

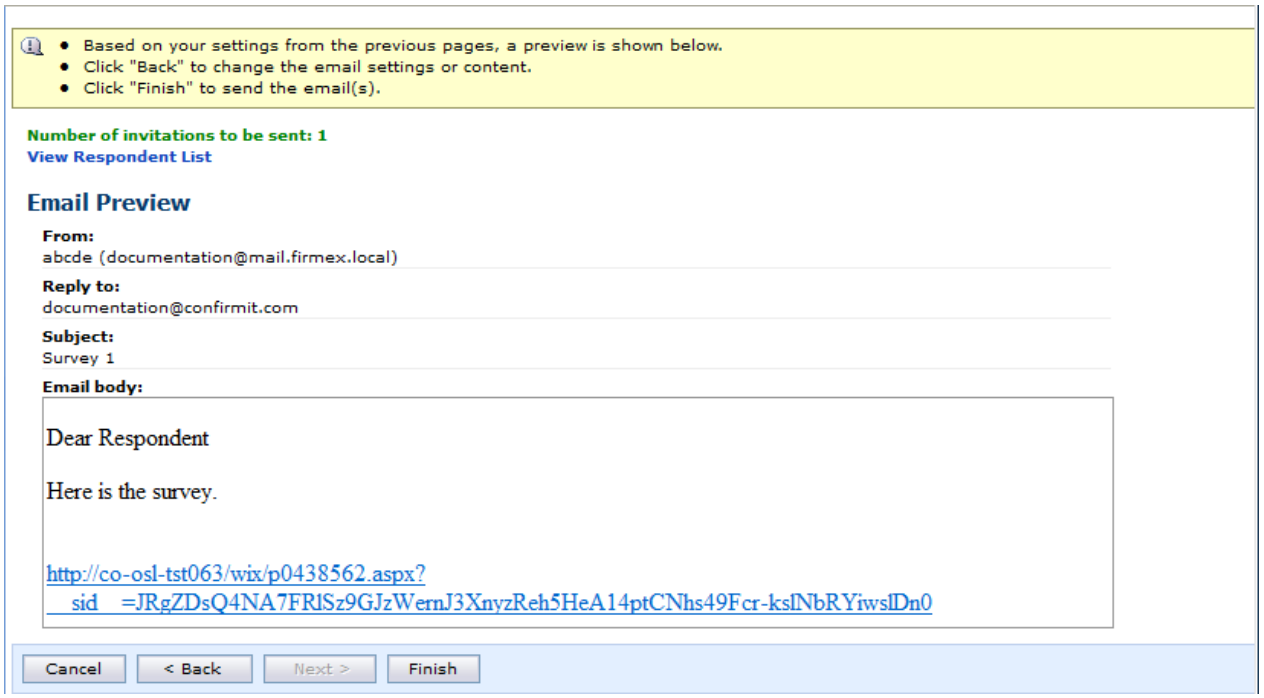


Figure 623 Example of the Email Preview page, including the survey link

5. Check the details, and if all is correct click **Finish** to send the emails.

In the event some of your respondents neglect to reply to your survey, you can send a reminder email to jog their memories. To create reminder emails:

1. Go to the **Respondents > Send Reminders** menu item.

   The Send Reminders page opens.

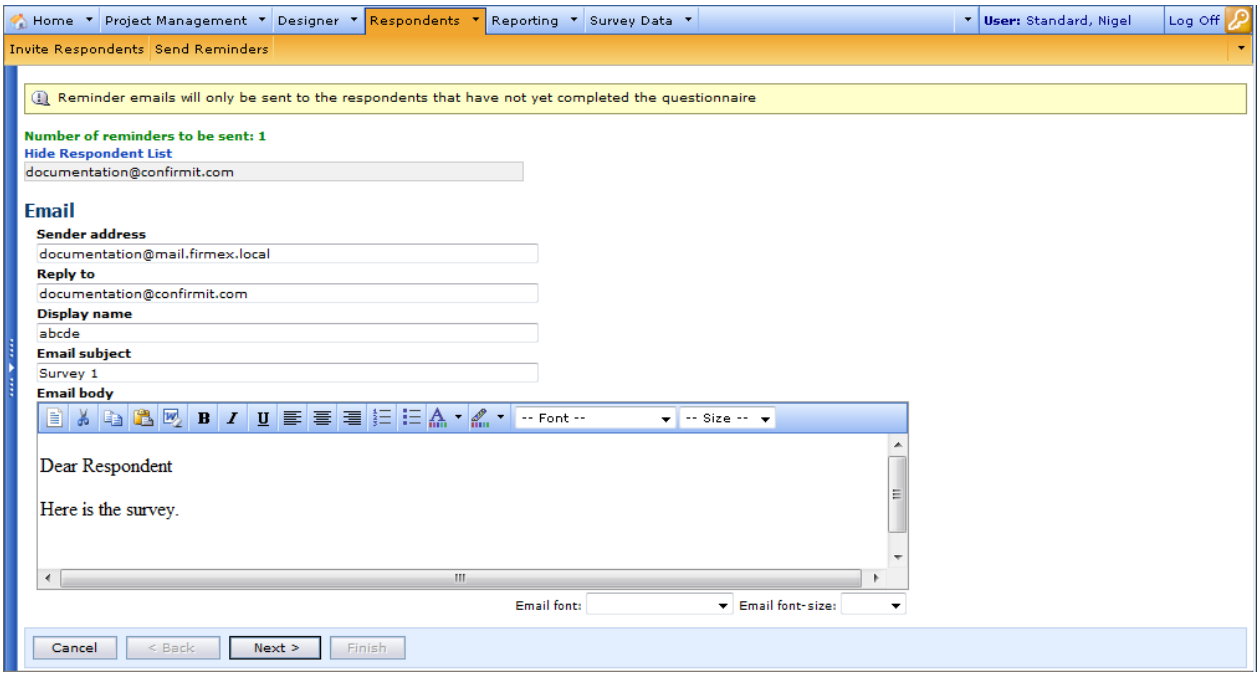


Figure 624 Example of the Send Reminders page

2. Edit the text of the email as appropriate, then click **Next**.

   The Email Preview page opens allowing you to check the details.

3. If all is correct, click **Finish** to send the email(s).

Note that the reminder emails use the same respondent list as the original invitation email, but the reminders will only be sent to those respondents who have not already completed the survey.

19. Basic Panels

Note: For some customers, the Basic Panel functionality is a chargeable Add-On.

The Basic Panel functionality enables survey managers to create, monitor and handle panels of respondents in Confirmit. The Basic Panel functionality includes the following features:

- Creation of new panels (see How to Create a Panel on page 586 for more information).
- Delegating administrative permissions for panel surveys and portals.
- Recruiting panelists for a panel (see Recruiting Panelists on page 586 for more information).
- Management of panelists within a panel
- Panelist web page template editor
- Sampling functionality
- Uploading of panelists to surveys
- Importing and exporting of panelist credits.
- Importing and exporting of panel data using the wizards (see Data Transfer on page 795 for more information).

Note: The Basic Panel menu commands described in this chapter are only visible and accessible when a Basic Panel survey is selected in the Recent Surveys and Panels list. For descriptions of the panel and portal permissions pages, see the Survey Permissions topic (see Permissions on page 185 for more information).

19.1. Recruiting Panelists

When a person agrees to be a panelist, they complete a questionnaire to provide their personal details and other information that the survey company (your company) may require. There could be hundreds of questions. These could include such details as where the panelist lives, whether they drive and/or own a car and if so what type, whether they have any children and if so how many, their ages, sexes, what types of schools they attend, whether they have any pets and if so what types etc. The panelist's answers to these questions are entered into a database and later used to determine the panelist's suitability to participate in a particular survey.

A Sample is a group of people who have been selected from a Panel to participate in a particular survey. The members of the sample will have specific characteristics that make them suitable for that survey.

Note: Under most conditions a panel has a maximum capacity of 500,000 panelists.

19.2. The Basic Panel List

The Panel list is organized in the same way as the Survey list. See the Search Lists, Surveys and Basic Panels sections for further information.

19.3. How to Create a Panel

To create a new panel:

1. Go to the **Home > New > Basic Panel** menu command, or click the **New Basic Panel** button in the Basic Panel List.

   In all cases, the New Panel overlay opens.

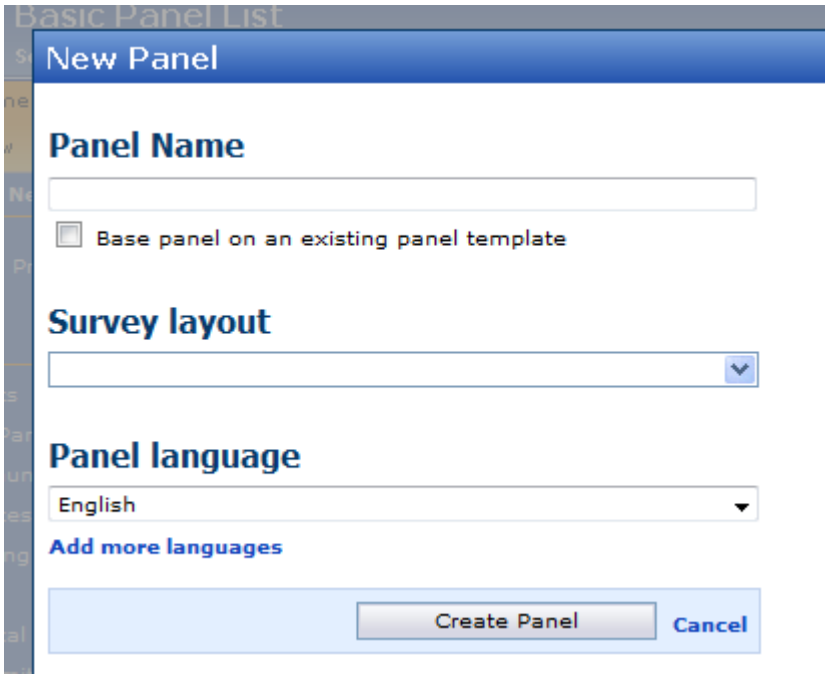


Figure 625 The Panel Name window

2. Type in a name for the new panel, select whether or not you wish to base the new panel on an existing template, and select which survey layout you wish to use.
3. Select the language to be used for the panel, and add any further languages as necessary.
4. Click **Create Panel**.

   The Panel Overview window opens with the details of the new panel.

19.4. Creating a New Panel Survey

When you create a new Panel, the **Panel Management > Overview** window opens at the **General** tab (see Survey Management on page 174 for more information). This chapter focuses on Panel-specific functionality.

If you make any changes to the settings in the Overview, click **Save** to save the changes.

You can now create the questionnaire to be used for recruiting the panelists.

- Go to the **Designer > Survey Designer** menu command.

  The questionnaire builder toolboxes will be displayed with the default questionnaire for panels in the Questionnaire Tree.

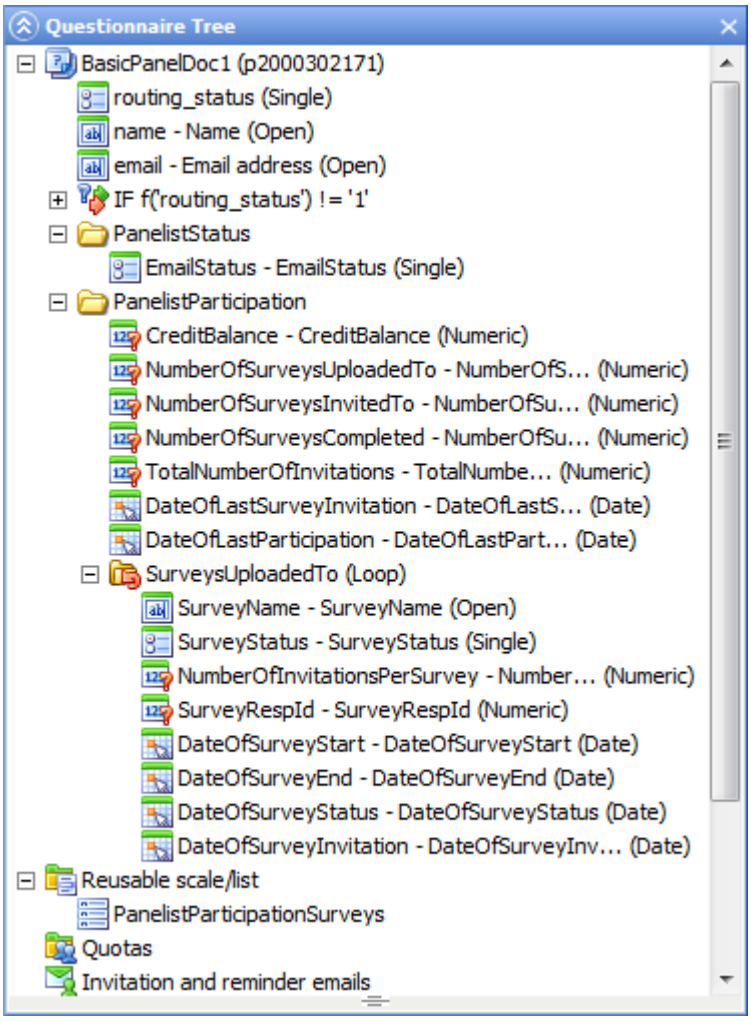


Figure 626 The default Panel questionnaire

You cannot remove the default objects from the tree, but as survey manager you may customize the objects and add new questions as required.

19.4.1. The PanelistParticipation Folder

The PanelistParticipation folder contains variables that hold various items of information on the panelists. These variables can be used when reporting on the panel and when creating samples. The folders outside the loop contain aggregated numbers across all surveys the panelist is uploaded to, whereas the folders inside the loop contain variables with information specific to each survey the panelist is uploaded to. The PanelistParticipationSurveys answer list will be updated automatically with new surveys as samples from the panels are uploaded.

Variable name	**Description**
CreditBalance	Total number of points the panelist has gathered. Refer to the Confirmit Scripting manual for the functions and scripts to set up the calculation.
NumberOfSurveysUploadedTo	Total number of surveys the panelist has been uploaded to.

NumberOfSurveysInvitedTo	Total number of surveys the panelist has been invited to (by email).
TotalNumberOfInvitations	Total number of invitations sent to the panelist across all surveys.
DateOfLastSurveyInvitation	The date and time of the last email invitation to any survey the panelist is uploaded to.
DateOfLastParticipation	The date and time when the panelist last accessed any of the surveys he/she is uploaded to.
SurveyName	Survey name of the survey (from overview).
SurveyStatus	The panelist's current status on the survey (e.g. complete, screened etc.)
SurveyRespid	The respid of the panelist in the survey survey's database.
NumberOfInvitationsPerSurvey	The number of email invitations sent to the panelist for the survey (noOfEmailsSent).
DateOfSurveyStart	The date and time the survey was last accessed by the respondent (interview_start).
DateOfSurveyEnd	The date and time the survey was finished by the respondent (interview_end).
DateOfSurveyStatus	The date and time the survey status was last set for the panelist on the survey.
DateOfSurveyInvitation	The date and time the last email invitation was sent to the panelist on the survey.

19.4.2. The PanelistStatus Folder

The PanelistStatus folder contains the variable EmailStatus that will hold the Email Delivery Status (see Email Delivery Report on page 578 for more information) for the panelists. This variable can be used when reporting on the panel, when updating samples, and when creating samples.

When you create a sample, upload it to a survey and distribute the invitations to the respondents, the Email Delivery Report will be created for these respondents in the survey. The delivery status from this survey will also be flagged in the panel survey, i.e. the respondent table for the panelist will be updated in the panel survey with this status.

The EmailStatus variable can have 3 values:

- **Valid –** if the receiving server responds with a message with a code under 400, the email address is Valid.
- **Error (Permanent Error) –** if the receiving server responds with a code between 500 and 599, this means a "Permanent Error" has occurred.
- **TempError (Temporary Failure) –** if the receiving server responds with a code between 400 and 499, this means a "Temporary Failure" has occurred.

19.5. The Panel Settings

You can define some custom settings for the panelists' password requirements. These are defined separately for each panel, so different panels can have different password requirements.

Note: The production database must exist before you can open the Panel Settings page.

Note: You must go to the Panel Settings page and activate the settings for each panel. No changes will be made to the panel's password settings unless you do so.

1. When in the Basic panel, go to the **Panel Management > Panel Settings** menu command.

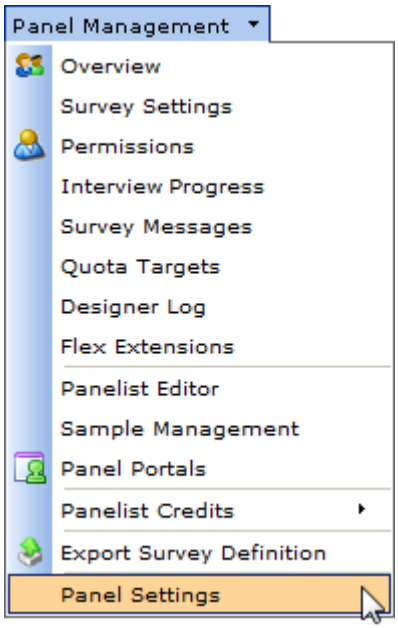


Figure 627 The Panel Management > Panel Settings menu command

The Panel Settings page opens.

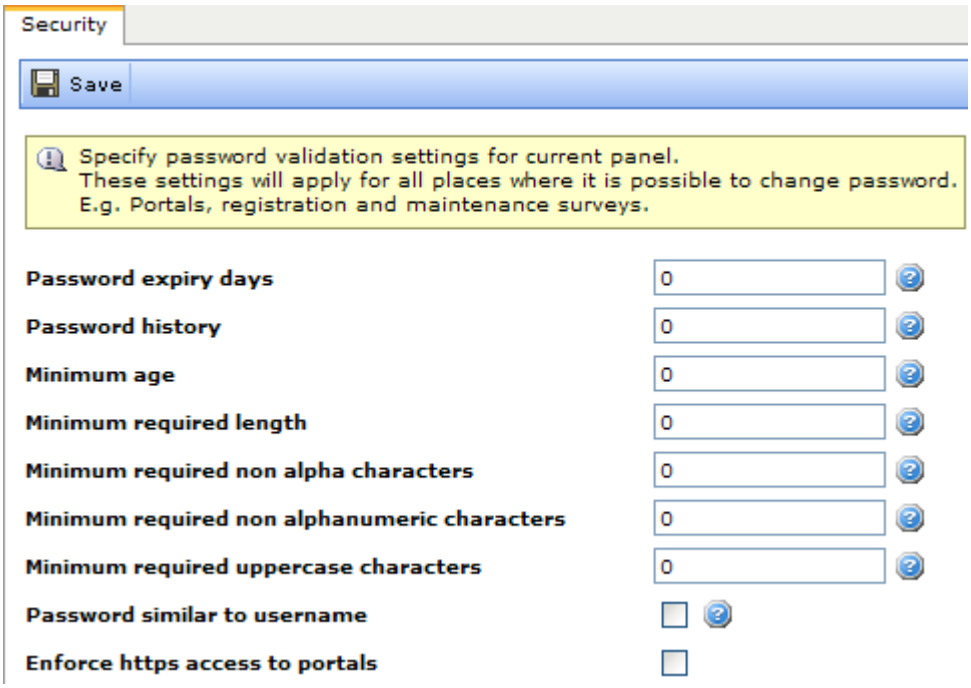


Figure 628 The Panel Settings page

The options are as follows:

- **Password expiry days -** specify how many days the password is to be valid after it has been changed. Use 0 to disable this functionality such that the password does not expire.
- **Password history -** specify that the new password must be different from the last X passwords used. This prevents the panelist merely using the same password over and over again. Use 0 to disable this functionality such that the same passwords can be reused.
- **Minimum age -** specify the number of minutes the user must wait after changing the password before they are allowed to change it again. Use 0 to disable this functionality.
- **Minimum required length -** specify the minimum number of characters (of all types) that a password must have. Use 0 to disable this functionality such that a password can be of any length.
- **Minimum required non alpha characters -** specify the minimum number of non alpha characters a password must have. This will force the panelist to use numerical and/or other characters in the password, thereby making it more difficult to guess. Use 0 to disable this functionality such that the panelist can use only alpha characters if so desired.
- **Minimum required non alpha numeric characters -** specify the minimum number of non alpha-numeric characters (for example #¤%& etc) that must be included in the password. Use 0 to disable this functionality.
- **Minimum required uppercase characters -** specify the minimum number of upper-case characters that must be included in the password. Use 0 to disable this functionality.
- **Password similar to username -** check the box if the password is to be validated against the username to ensure that the password and username are not identical. Leave the box unchecked to disable this functionality, thereby allowing the panelist to use their username also as their password.
- **Enforce https access to portals -** check this box to enforce HTTPS use by people accessing the portal.

2. When you have made the required changes, click **Save** to save them.

(see Password Policy on page 5 for more information).

19.6. Launching the Panel

Once you have created the questionnaire, you can create the response database. The process is exactly the same as for all other Confirmit surveys (see Preparing for Data Collection on page 492 for more information).

Important
If a panel is launched when there is high activity on projects related to that panel, those projects may experience slowness and SQL timeouts. This occurs because Confirmit will try to update the panel databases with respondent transaction information as that information is input. If a panel must be relaunched while related surveys are live then you should launch at a time when activity in the surveys is at a minimum.

A survey for panelist recruiting may be deployed as any other survey in Confirmit; that is, as an Open survey available to anyone, or as a Limited survey where you already know your respondents.

After having compiled the response database, the web interview must be generated. This is done in the same way as for other surveys in Confirmit (see Preparing for Data Collection on page 492 for more information). The only differences are the following:

- In addition to choosing the template for the survey in Layout, you must also choose the template for Panelist pages. This is the layout of the web pages where the panelists can log in and get an overview of their profile .
- You must specify the email address that is to be used when sending out lost/forgotten passwords requested by the panelists (by default, the email address from the user settings will be used).

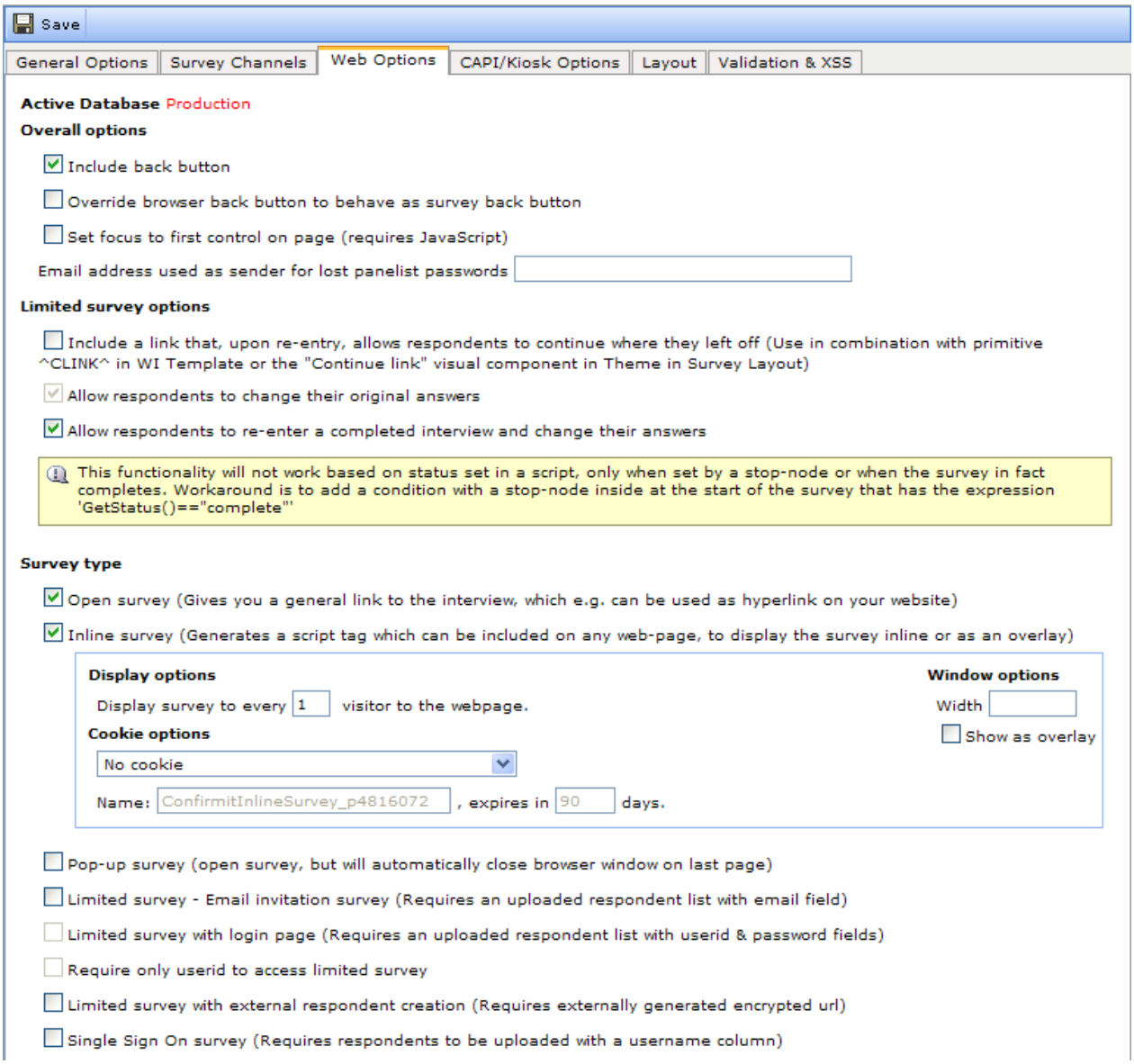


Figure 629 Survey Settings for Panels

For descriptions of the remaining properties, refer to the Survey Settings section in the Preparing for Data Collection chapter (see Survey Settings on page 492 for more information).

19.7. Panelist Editor

Once the respondents start replying to the panel survey, the survey manager can view the recruited panelists and edit the panelist details.

Note: The Panelist Editor functionality is only supported for Internet Explorer.

To view the panelists of a particular panel, go to the **Panel Management > Panelist Editor** menu command.

The Panelist Editor window opens.

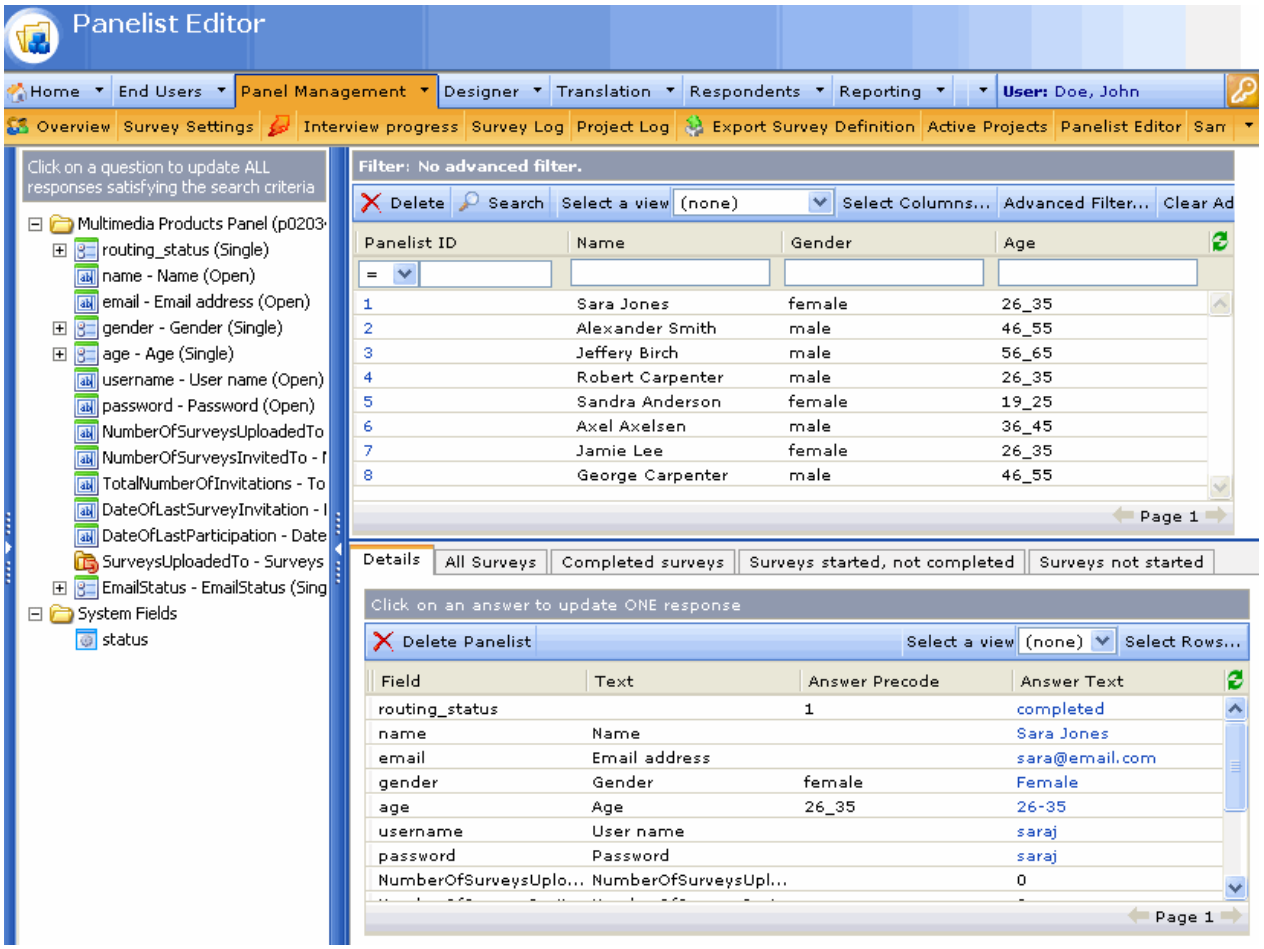


Figure 630 Example of the Panelist Editor window

The Panelist Editor's search and edit functionality is the same as that of the Survey Data Editor (see Edit Survey Data on page 785 for more information). You can search for panelists in the upper right frame, update variables for the entire search result in the questionnaire tree on the left side, and view and edit a particular panelist in the lower right frame by clicking the panelist id in the search list.

The tabs that are particular to the panelist editor are:

- **All surveys -** lists all the surveys the panelist has been uploaded to.
- **Completed surveys -** lists all the surveys the panelist has completed.
- **Surveys started, not completed -** lists all the surveys the panelist has started answering, but not completed (incomplete status).
- **Surveys not started -** which lists all the surveys the panelist has been uploaded to, but which he/she has not started answering (not answered status).

For information about the other functionality in Panelist Editor, refer to the EditSurveyData section.

19.8. Sampling Functionality

The Sampling functionality allows you to define several samples within the same panel, and send out different surveys to different samples as required.

19.8.1. How to Define a Sample

To create a sample:

1. Go to the **Panel Management > Sample Management** menu command.

   The Sample List page opens. This page lists all the samples for the current panel.

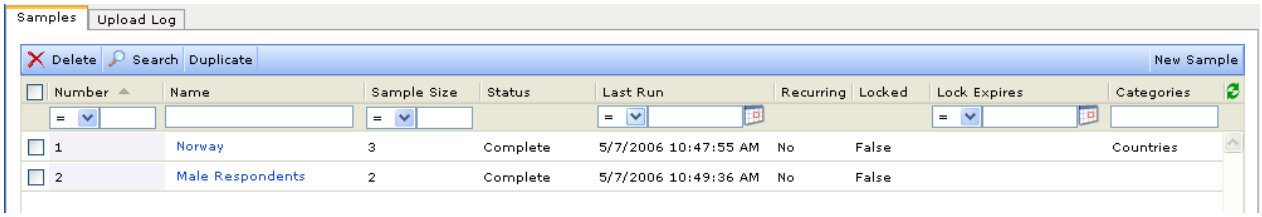


Figure 631 Example of a Sample List page

2. Click the **New Sample** button in the upper right corner of the list.

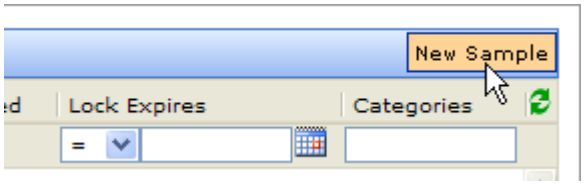


Figure 632 Creating a new sample

This opens the sample details page. Here you can define a name for the sample, run the sampling, schedule it and lock it.

Note: Several of the properties on the General tab, and the other tabs, only become accessible after the new sample has been saved for the first time.

You can also define sample categories. Several samples can belong to one category, for example, in our example, the category is called “Male Panelists”. When extracting samples for, for example, other age groups for male panelists, you can specify the same category for these. Categorization makes organization of samples easier in the sample list.

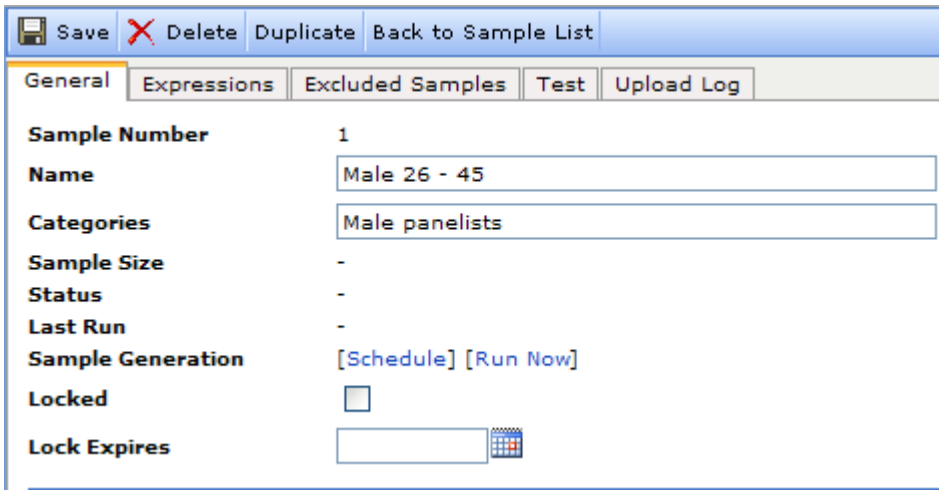


Figure 633 Sample Definition

19.8.2. How to Lock a Sample

You can lock the sample so the panelists in the sample cannot be used for any other samples until the lock expiry date or until you manually remove the lock. To lock the sample:

1. On the **General** tab, check the **Locked** box.
2. In the Lock Expires field, type in or select the desired expiry date for the lock.

   Once the sample lock expires, those members of the sample will then be available to be included in other samples.
3. Save the changes.

Note: An error message will be displayed if you attempt to save the changes without specifying an expiry date for the lock.

19.8.3. How to Create an Expression

On the Expressions tab you create one or more expressions (filters) that define the group(s) you want in your sample.

Note: The panel must be launched before you can create the expression.

To create a new expression:

1. In the Expressions tab, click **New Expression** in the upper right corner.

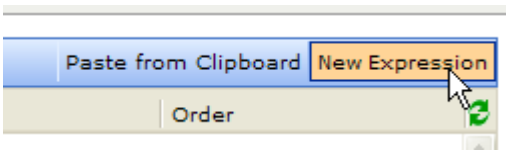


Figure 634 Creating a new Expression

   The Expression Builder window opens with a new, "empty" expression.
2. Type a suitable name for the sample into the Name field, select the type of Count you wish to use and the desired selection order.

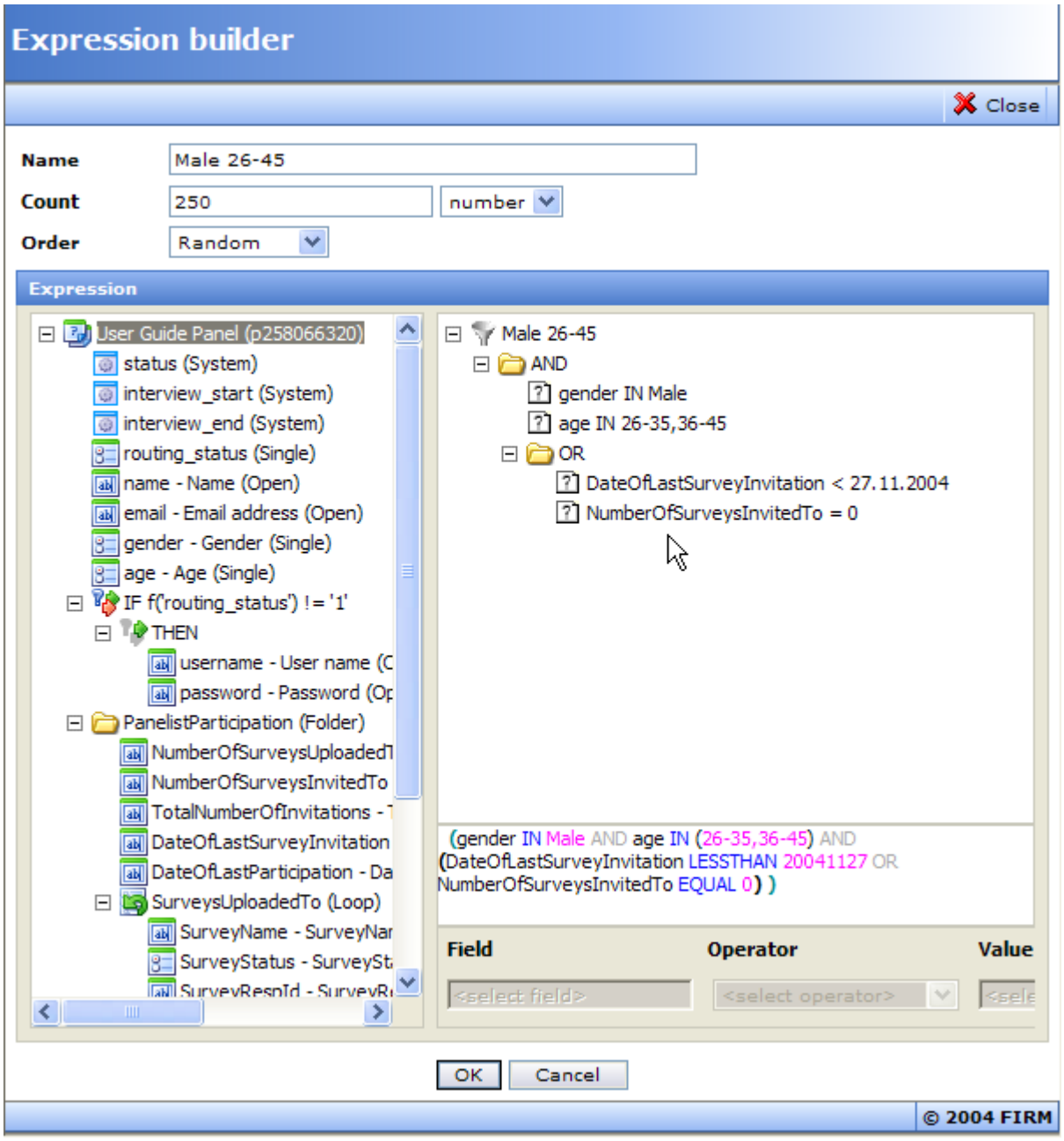


Figure 635 Example of the Expression Builder

- **Name** - the name for the sample.
- **Count** - the number of panelists to be extracted. The Count setting defines the targets to pick, either as a fixed **number** of panelists, as a **percentage** of the panelists matching the expression, or **all** the panelists who match the expression.
- **Order** - the order in which the panelists are selected. You can choose between selecting them from **random** locations throughout the panel, selecting starting at the top of the list (**ascending**) or the bottom of the list (**descending**).

Note: You must enter the Name of the sample and the number of panelists to be extracted from the panel before you can add an expression to the expression list.

3. Select the initial operator to be used in the expression - **And** or **Or**.

   To change the operator, right-click on the current operator and select the required option.

4. In the column to the left, click on the first question you want to use for the sample and drag it into the expression area to the right. Note that you must drop the question onto the icon beside the operator name - if you drop it onto the AND text it will not copy.

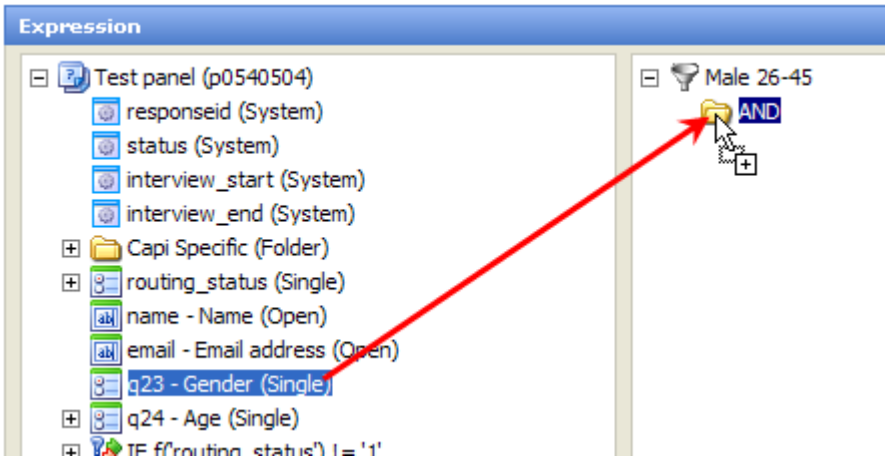


Figure 636 Dragging a question onto the operator icon

When the question is highlighted, the Rule builder fields will open and you can build your expressions. A sample can be built on several expressions that are based on several questions, and you can base one expression on several questions. The expression builder uses the same functionality to define the expression as filters for Topline Report (see The Advanced Filter Designer on page 742 for more information).

If you wish to exclude panelists from certain other samples from being selected for this sample, move those samples from the "available items" list to the "excluded items" list under the "Excluded Samples" tab.

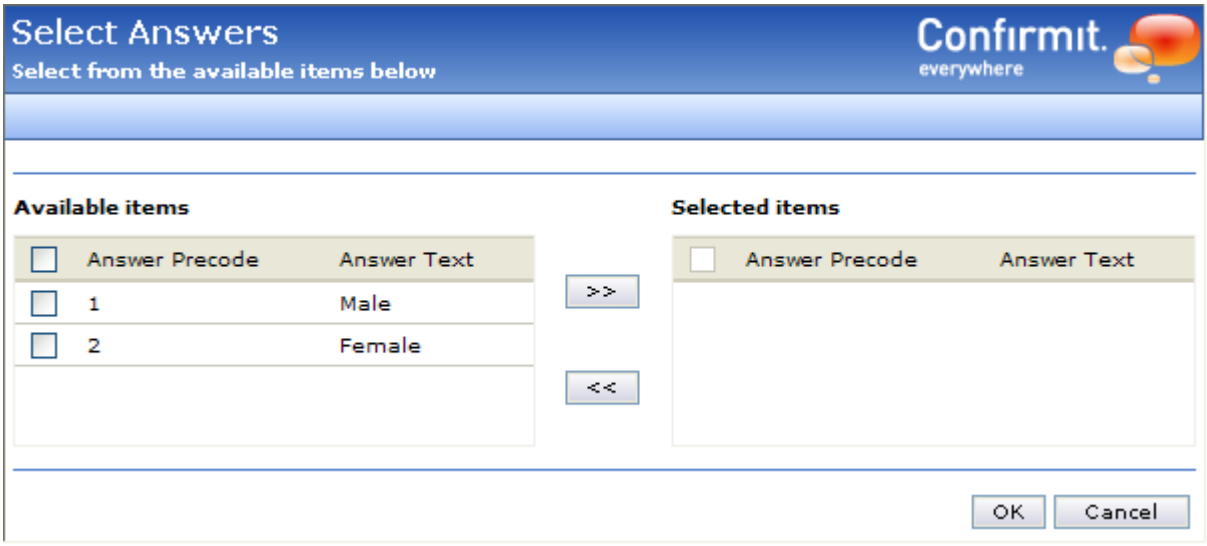


Figure 637 Excluding samples

If you want an estimate of the number of panelists that would result from running the sampling on the panel, go to the Test tab and click the **Test sample** button. This will return an estimated count. You may choose to ignore any locked samples when performing this test.

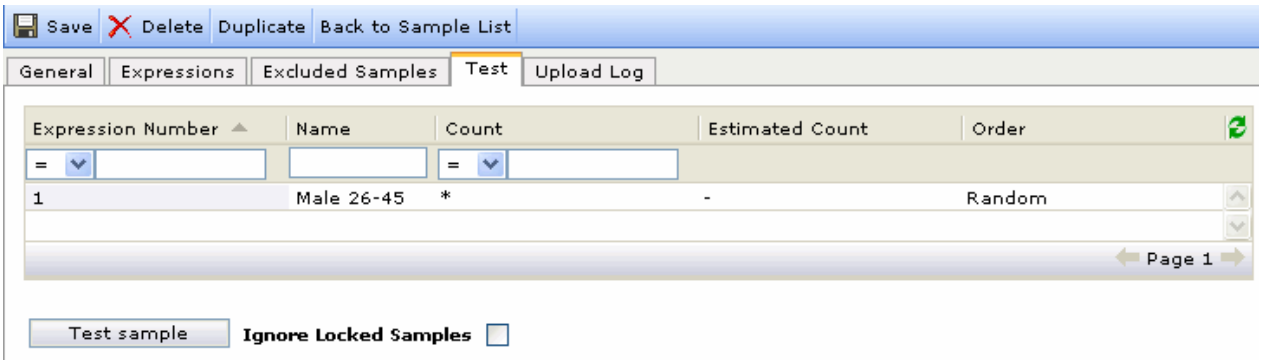


Figure 638 The Test tab

Click on the Upload Log tab to track which surveys the sample has been uploaded, to and when it was uploaded.

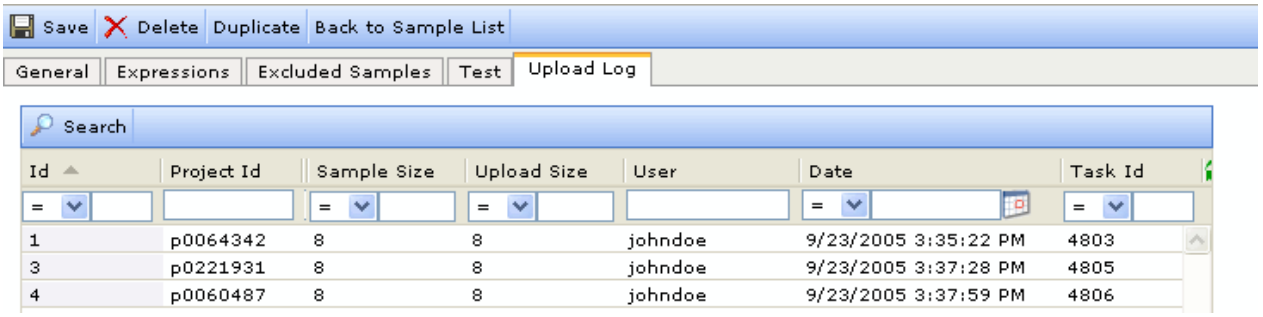


Figure 639 Example of the Upload Log

If you wish to copy an expression used in one sample definition into another sample definition, go to the Expressions tab, select the expression and click **Copy to Clipboard**.

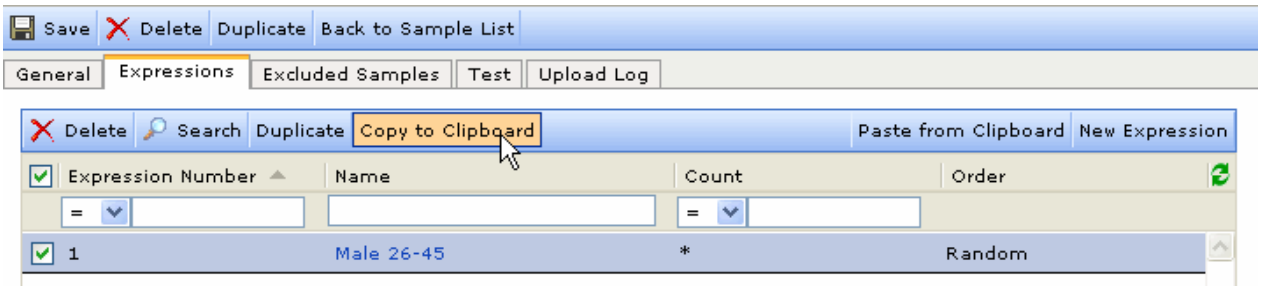


Figure 640 Copying an expression to the clipboard

You can then go back to the sample list, choose the other sample (or create a new one) and under Expressions for that sample, click **Paste from Clipboard** to insert the expression.

19.9. Uploading Samples to Surveys

If you wish to retrieve values of panel variables so you can use them in a survey, for example in conditions or in reporting,

1. Go to the **Designer > Survey Designer** menu command.
2. Double-click on the question you wish to use to open the Question Details page, and open the Properties page for that question.
3. Set **Variable type** to **Panel variable** ("hidden" or visible" as appropriate) .

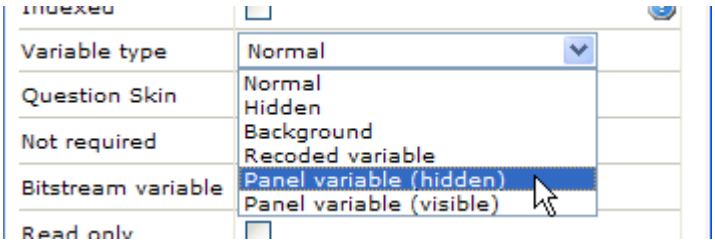


Figure 641 Adding a Panel Variable to the Survey

Note: For surveys that you have sampled to/from Basic Panels, "Panel variable (hidden)" and "Panel variable (visible)" can both be used and will retrieve data from the panel database. However, neither of them will update the panel database with changed values. For surveys linked to a Professional Panel, both types can be used, and will retrieve data from the panel database. "Panel variable (visible)" will also update the panel database (provided that the panelist exists) when the respondent moves to the next page. "Panel variable (hidden)" will not update the panel database (see The General Tab on page 251 for more information).

Note: Confirmit does not support sampling from both Basic Panel and Professional Panel into the same survey.

The question must have the same question id as in the panel. This will function in the same way as "background variable": The question will not be displayed to the respondents, and the value will be fetched from the panel.

The survey can either be sent to the panelists by email or, as uploading the panelid and panelistids into the survey creates the links between the panel, panelist and the surveys, the panelists can access their panelist login pages .

To upload a sample:

1. Go to the **Respondents > Sample Upload** menu command.

   The Sample Upload panel list opens, enabling you to select a panel to view its samples.

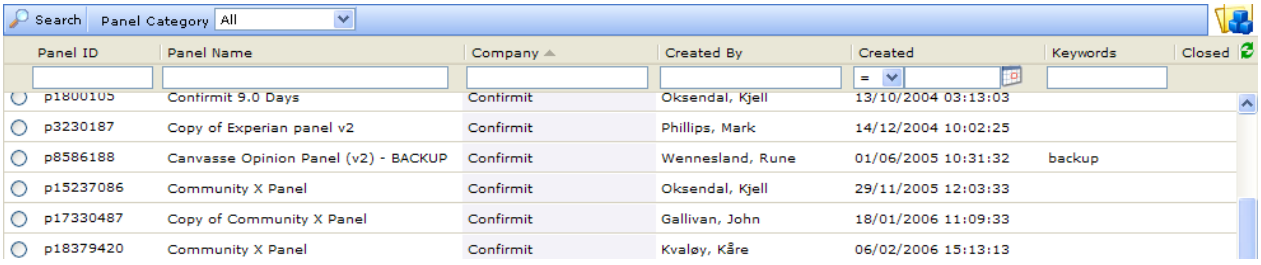


Figure 642 Example of the panel list from which you can select the panel to view its samples

2. Click on the radio button beside the desired panel, then click **Next** to view the list of samples for that panel.

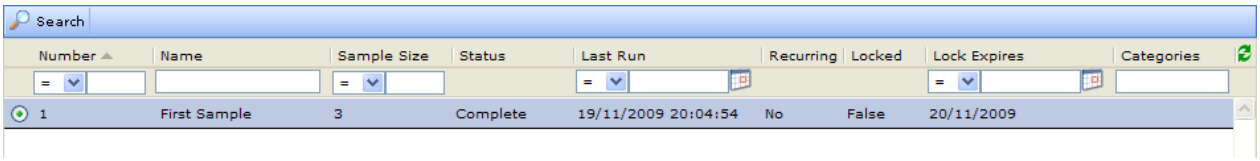


Figure 643 Example of a sample list for a selected survey

3. Highlight the sample you want to upload to the survey, then click **Next**.

   The Properties dialog opens.

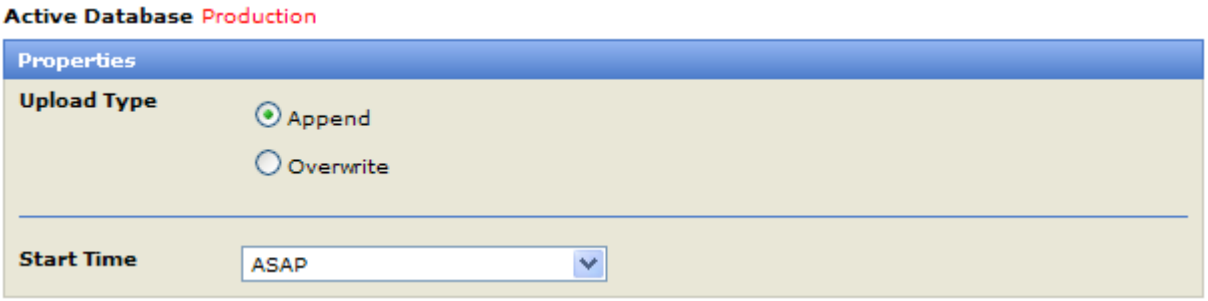


Figure 644 The Properties dialog for the upload task

- **Append -** the uploaded data will be added to the already existing data, if any. If there is a match in the key field between the uploaded data and data already in the database, the uploaded data will not be added (the original data in the database will be kept).
- **Overwrite -** the entire respondent table is deleted and replaced by the new sample. Any existing survey data will also be deleted. A warning will be displayed when this option is selected.

4. Select whether you wish to append the selected sample to any existing samples in the survey, or overwrite any existing samples. Select also whether you want to run the task as soon as possible or schedule it to run later, possibly as a recurring task.
5. Click **Finish**.

   If you have selected to run the task later, the task setup page opens where you can set the start time etc. Otherwise, the task will run.

Now you can email the survey to the new sample, and since the new respondents are panelists, they will be able to access the survey from their personal pages in addition to directly from a survey link

19.10. Survey Overview in a Panel

The Survey Manager can view all the surveys linked to a panel. To do this:

1. Select a panel.
2. Go to the **Panel Management > Overview** menu command.

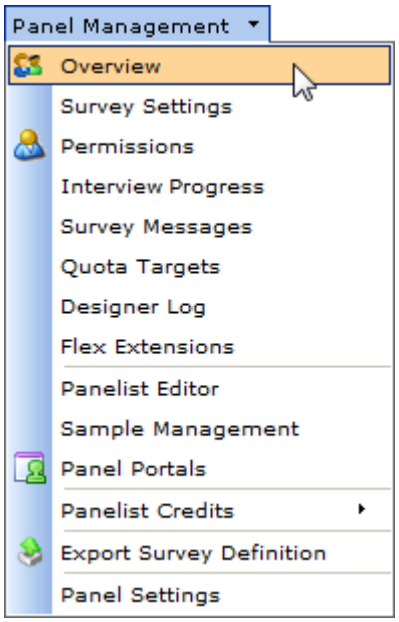


Figure 645 Select Active Surveys

The Panel Overview page opens.

3. Go to the Active Projects tab.

   The Active Projects list appears. This page lists all surveys that panelists from this panel have been uploaded to. Click on a survey to enter it.

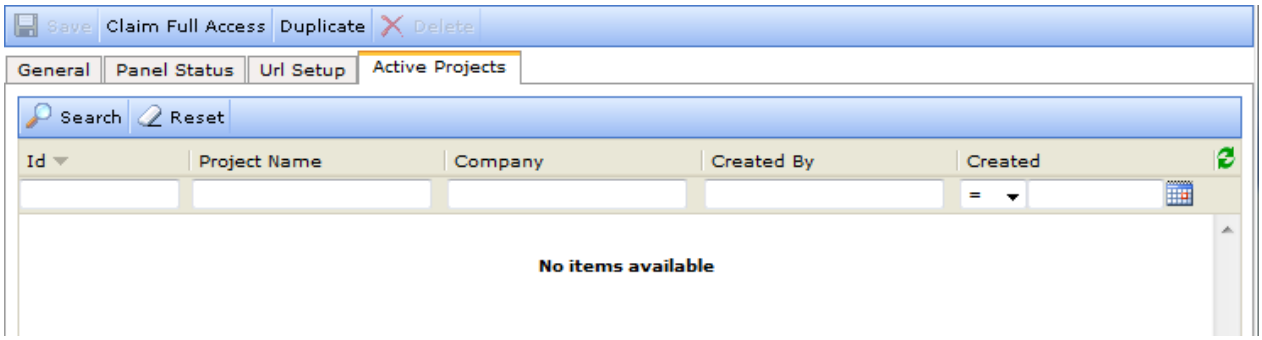


Figure 646 Example of an Active Projects list

In the event the list is extensive, you may search through the list by adding search criteria to the fields above the various columns. By default, a maximum of 50 surveys will be displayed per page. To change this quantity, click into the Page Size field and type in the required number, then click **Search**.

19.11. Panelist Credits

This menu command enables you to import and export panelist credits (see Credit Balance on page 628 for more information). The menu contains two options:



Figure 647 The Panelist Credit menu

19.11.1. How to Export Panelist Credits

This procedure exports the panelist credits for all the panelists in the selected panel. To export panelist credits:

1. Go to the **Panel Management > Panelist Credit** menu command and select **Export**.

   The Export Panelist Credits dialog opens.

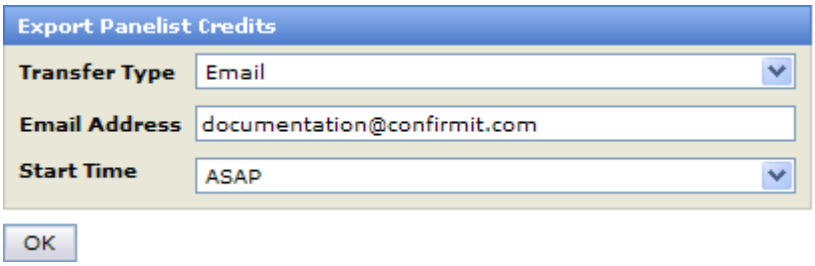


Figure 648 The Export Panelist Credits dialog

2. Select the type of transfer you wish to perform; Email or via FTP.

Note: The FTP transfer option is a chargeable add-on. This option will only be available if your company has the appropriate license. If so, the FTP site details will be specified automatically by Confirmit.

3. If Email is selected, check the recipient email address is correct and edit as necessary.
4. Specify the start time for the transfer.

   If you select Schedule for Later Execution, you can set the export to be a recurring task, that is, it will be performed automatically at specified time intervals.

5. Click **OK**.

   The task runs at the specified time, and the panelist credits are exported as a zipped .txt file.

19.11.2. How to Import Panelist Credits

The panelist credits for a panel can be exported as a zipped .txt file, via email, or if you have the appropriate license, via FTP (see How to Export Panelist Credits on page 603 for more information). Note that there are a number of information columns that must be included in the .txt file to be imported. These are "required fields" and must have the column headers as shown:

Field/column name	Description	Required/Optional
PanelistID	The unique panelist ID of the panelist. Maximum number of characters is 50.	Required
PanelistTransactionID	The ID of the particular credit entry.	Required

SurveyID	The survey ID of the survey for which the credit is being granted.	Required
Credit	The credit amount.	Required
Created	The date for the credit entry.	Required
Comments	A text string, up to 256 characters.	Optional
SectionID	A string used if credits are to be assigned multiple times for one survey. Up to 40 characters.	Optional

If the file has been exported via email, first save the file attachment to an appropriate folder in your network.

1. Open the Panel to which you wish to import the panelist credit file.
2. Go to the **Panel Management > Panelist Credit** menu command and select **Import**.

   The Import Panelist Credits dialog opens.

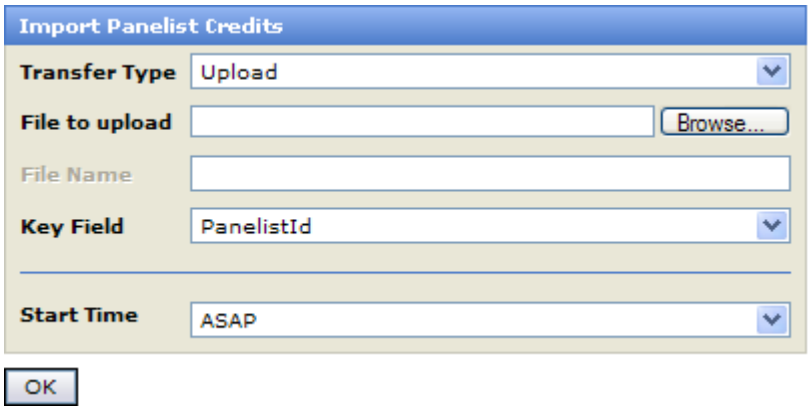


Figure 649 The Import Panelist Credits dialog

3. If the file has been exported via email, select the Transfer Type to be **Upload** then browse to the file that is to be uploaded and select it. If the file has been exported to FTP, type the file name into the File Name field.

Note: FTP export requires your company to license an add-on. The FTP site details will then be specified automatically by Confirmit.

4. Select the Key Field that is to be used to identify the panelists to which each credit value is to be credited.

   This list is populated automatically from the fields available in the panel.

5. Set the start time for the import task.

Note: If the file is to be exported at regular intervals (using a recurring task) then you can also set the import to occur at corresponding intervals, thereby updating the credits automatically. In this case, ensure you allow a delay between the times set for the exports and the imports to allow for possible queues in the task server.

6. Click **OK**.

   The import will be performed at the specified time(s).

19.12. Panel Portals

In Confirmit you can build a library of panelist interfaces, called Panel Portals, through which your panelists and potential panelists can read about your panels and register themselves as new panelists. Those who are already panelists (members) can log into the Panel Portal to answer new or previously started surveys, view their survey list, update their profile, view their points etc. All these actions are conducted via the same interface (see Basic Panels on page 586 for more information).

To access the portals currently connected to a panel, go to the **Panel Utilities > Panel Portals** menu command whilst in the panel.

19.12.1. What is a Portal / Panelist / Panel

A panel functions in the same way as a normal survey. Typically, a panel consists of mapping and profiling questions, and other categories such as work-related and household questions. The panelists register themselves in your panel, or you can import people directly into your panel if you already have their information. Based on the panelist information stored in the panel, you can select appropriate respondents to answer surveys.

A Panel Portal is the interface (homepage) through which the panelists log in to participate in surveys, update their profile, etc.

A Panel can also be used by a company to hold information about its employees and/or customers. You can then send specific people surveys based on the information in the Panel. For example, if you want to send a seminar registration survey to all employees working in a particular city and a particular department, and who have not already attended that seminar, then the panel will give you a sample containing the people matching these criteria, and upload the list to the seminar registration survey.

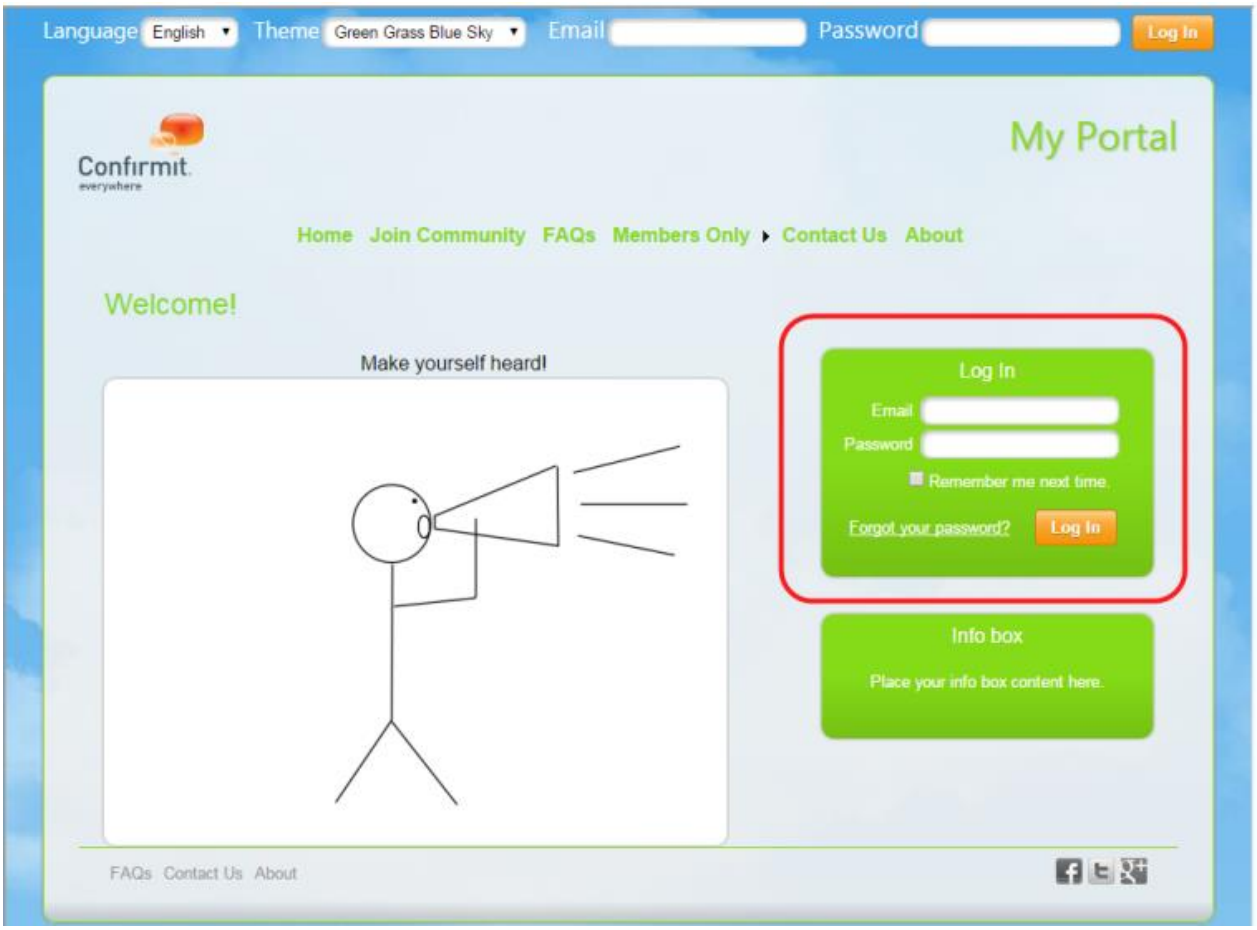


Figure 650 Example of a Panel Portal

Panel Portals can only be used together with Confirmit Panels. For further details on Panels, see the Confirmit Professional Panels User Guide.

19.12.2. The Panel Portal List

From the list of available portals you have direct access to the Panel Portals.

- Click on the name of a portal to go directly to the Portal Designer for that portal.
- Click the arrow symbol to the right of the portal name to open a drop-down menu. From here you can:
    - o Access the Portal **Designer** for the portal specified. Here you can edit the portal, optimizing it for the current panel.
    - o **View** the published version of that Portal as a panelist.
    - o Make a **Duplicate** of the portal. You would often do this if you wanted to create a new portal that was similar to an older one, then you would only have to edit the new portal rather than creating one from the beginning.
    - o **Export** the Panel Portal to transfer it across to other Confirmit Installations or for offline storage.

You also have two buttons available here; for importing existing portals and creating new.

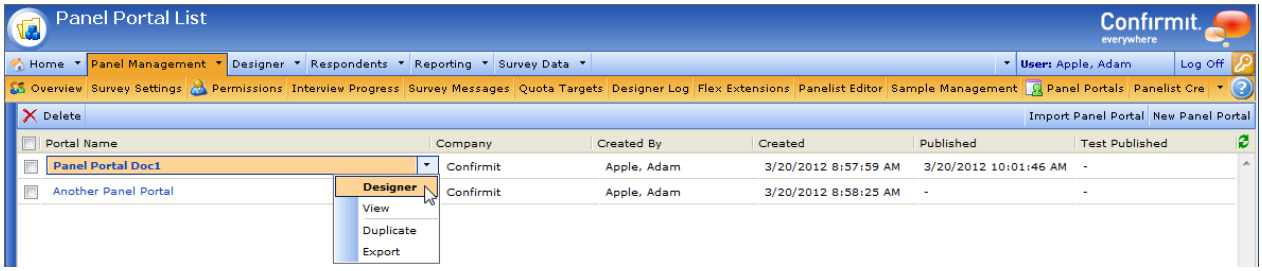


Figure 651 Accessing a Panel Portal

19.12.3. How to add a Portal to your Panel

A Panel Portal can only be activated on a Confirmit Panel. You can do this in two ways; either by adding an existing Panel Portal template to your panel (this is the most common approach) or by creating a Panel Portal from scratch. Note that the panel database must be generated and the portal must be published before it can be added to a panel.

To add a Panel Portal to a Confirmit Panel:

1. In Confirmit, go to the **Home > Professional Panels** menu command.
2. In the Professional Panel List, click on the required panel to open it.
3. Go to the **Panel Utilities > Panel Portals** menu command.

This opens the Panel Portals List, which contains all the portals currently attached to this panel (if any). You can now import an existing portal (see Importing an Existing Portal to a Panel on page 607 for more information), or you can create an entirely new portal for the panel (see Creating a New Portal within a Panel on page 606 for more information).

19.12.3.1. Creating a New Portal within a Panel

Go to the **Panel Utilities > Panel Portals** menu command; the Panel Portal list opens. This page lists all the portals that you have access to. The portal currently linked to your panel (if any) is shown in bold.

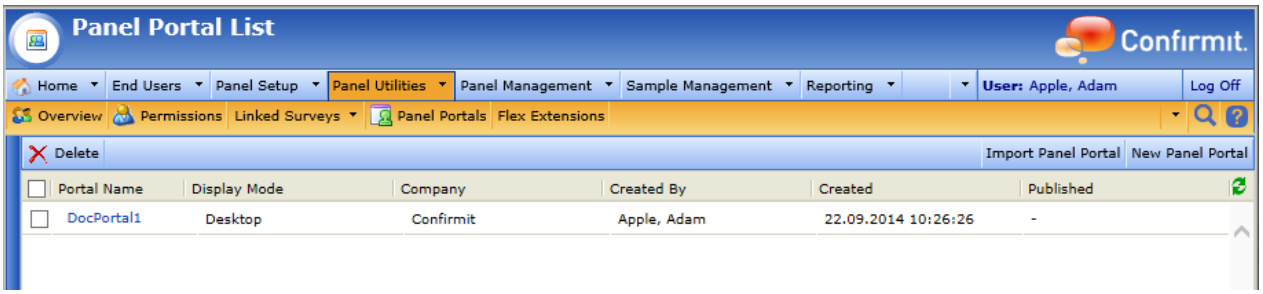


Figure 652 Example of a list of available Panel Portals

To create a new Panel Portal:

1. Click the **New Panel Portal** button.

   Confirmit takes you through a two-step wizard. The New Template - Step 1 overlay opens.

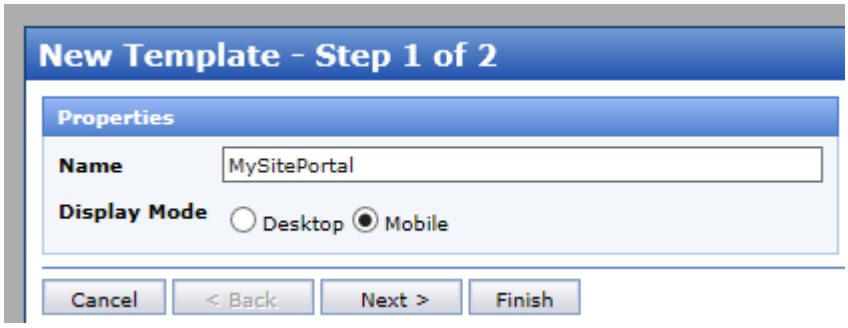


Figure 653 Step 1 of the 2-step wizard

2. Give your new portal a name.
3. Select whether you wish this portal to be set up for Desktop or Mobile layout.

   If you then choose **Finish**, an empty Portal Designer page opens. If you choose **Next**, you can choose a template on which to base your new Panel Portal.

4. When you then click **Finish** on step 2, the Portal Designer opens with a copy of the template you chose in step 2.

Build the various portal pages in the Portal Designer. For more information on how to work inside the Portal Designer, go to the Working with your Panel Portal section.

To import Panel Portals created on other Confirmit installation, click the **Import Panel Portal** button (see Importing an Existing Portal to a Panel on page 607 for more information).

19.12.3.2. Importing an Existing Portal to a Panel

An occasion may arise when you wish to import an existing portal into a panel. In this case, the portal must first be exported from its original panel, then imported into the new panel.

1. In the Panel Portal List, right-click on the portal you wish to export and select **Export** from the drop-down menu.

   The Export Properties dialog opens.

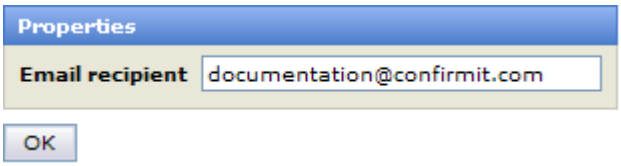


Figure 654 The Panel Portal Export Properties dialog

2. Ensure the email address to which the portal definition file is to be sent is correct (default is the address of the currently logged on user).
3. Click **OK**.

   The portal definition file is zipped and attached to an email, and this is sent to the specified address.

On receipt of the email:

1. Open the email and save the attached file to a logical folder on your system.
2. Go to the panel into which you wish to import the portal.
3. In the Panel Portal List, click **Import Panel Portal**.

   The Import Properties overlay opens.

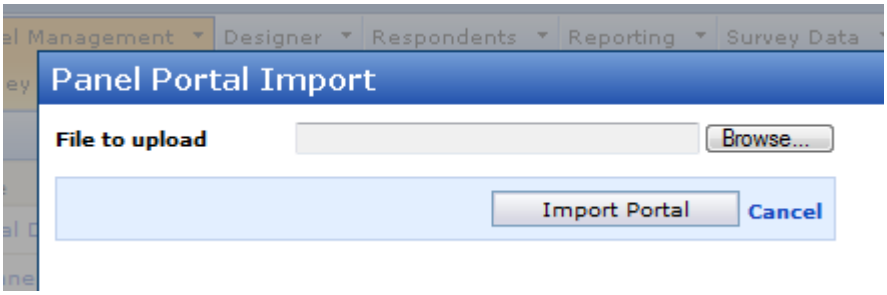


Figure 655 The Panel Portal Import Properties dialog

4. Browse to and select the portal definition file that you wish to import.
5. Click **OK**.
6. When the task has completed click **OK** again to return to the Panel Portal List.

   The imported portal definition is included in the list. You can now open it and edit it as required.

19.12.4. Working with your Panel Portal

The Panel Portal Designer is where you create and make changes to your portal pages. The example shows a portal with a Page Master, two Themes and a number of Pages visible. In addition, in this case the Members folder contains some additional pages (see Folders on page 619 for more information).

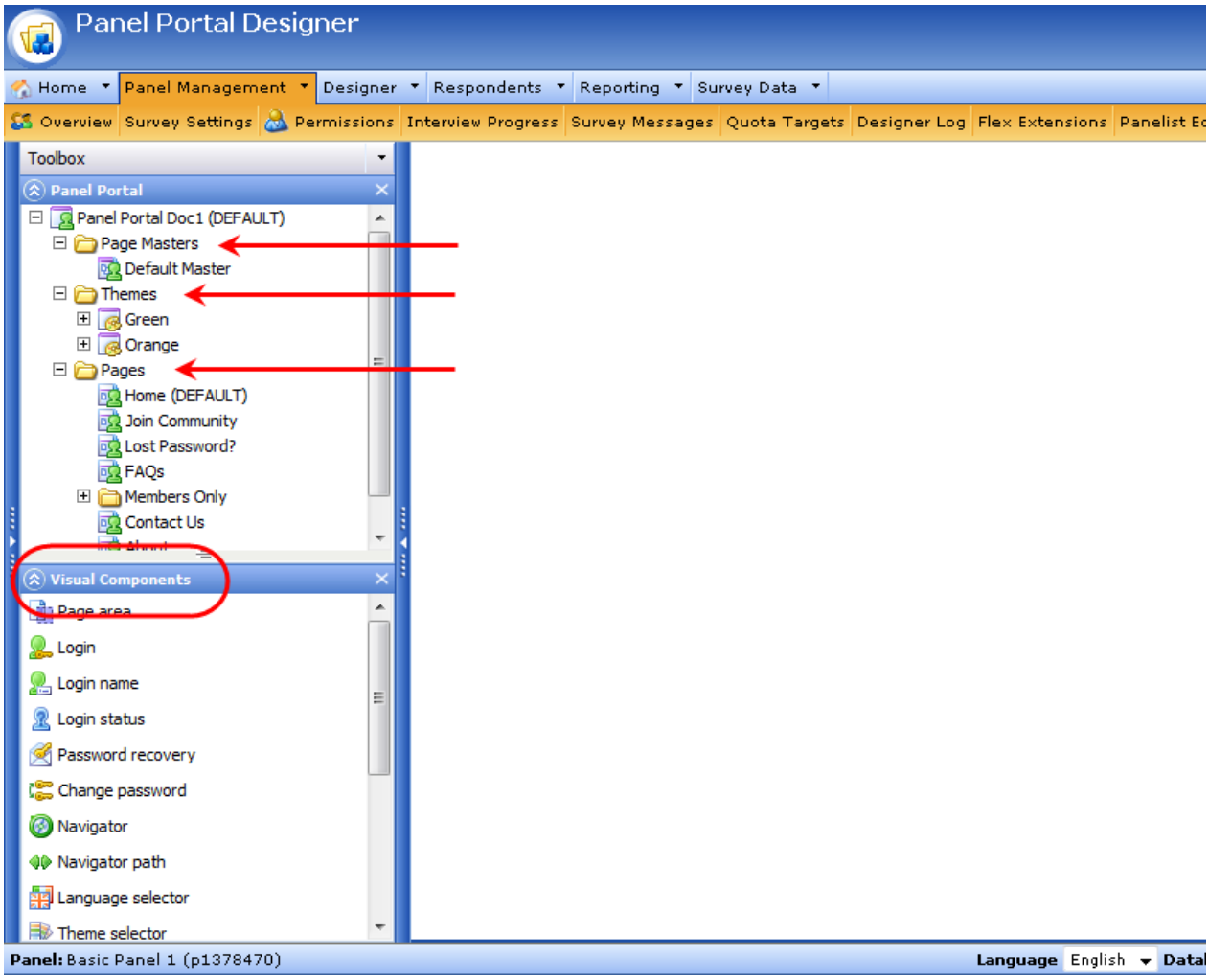


Figure 656 The toolboxes inside Portal Designer

The Portal Designer contains two toolboxes:

- The Panel Portal toolbox holds all your Page Masters (see Page Masters on page 609 for more information), Themes (see Themes on page 610 for more information), and Pages (see Pages on page 615 for more information).
- The Visual Components toolbox contains the elements that you can use on a page (see Visual Components on page 621 for more information).

In the Panel Portal toolbox, right click on the portal name and select Properties or double-click on the name to open the portal's Properties page (see Properties on a Panel Portal on page 630 for more information).

19.12.4.1. Page Masters

A Page Master is an overall page look-and-feel. You can create as many page masters as you wish. You can apply a page master to each portal page, and each portal page will then have the look-and-feel specified by the associated Page Master.

19.12.4.1.1. Editing a Page Master

To create a new Page Master:

1. In the toolbox, right-click on the text Page Masters (next to the yellow folder), and choose **Insert new Page Master**.

   A blank Page Master is added to the portal. If you want to base a new Page Master on an existing one, then right-click on the desired Page Master and choose **Duplicate**.

   The example below contains a Page Master called “Default Master”.

2. To edit a Page Master, double-click the name of the Page Master or right-click and choose **Edit**.

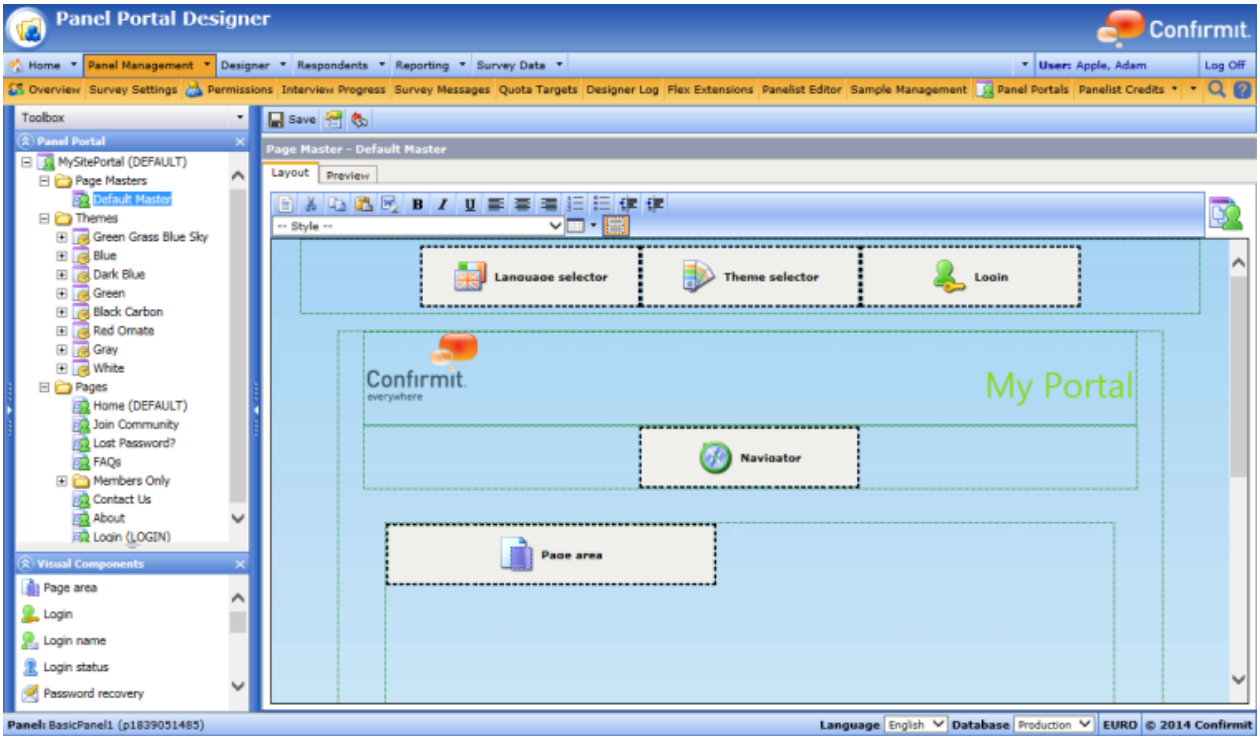


Figure 657 Editing a Page Master

When editing a Page Master (as with a portal page), there are two tabs in the upper left corner to use. The figure above shows the Layout tab, under which you decide the positioning of the Visual Components (page elements). To decide look-and-feel for each of the Visual Components, double-click the element or right-click on the element and choose **Edit** (see Visual Components on page 621 for more information).

You can use free-form text and images on your portal pages (see Editing your Page Masters and Portal Pages on page 637 for more information).

Click the Preview tab to preview the current version of the Page Master. Remember to save any changes before previewing the Page Master.

19.12.4.2. Themes

The themes used in portals operate on the same principle as those used in surveys (see Themes on page 76 for more information). A theme is a collection of different Styles, each holding a specific layout definition (see HTML Styles on page 102 for more information). Inside a Panel Portal you can have as many themes as you like, but only one can be active at a time. You can right-click the theme you want to set as default. Also, if you want the panelist to be able to select his or her theme, you can use a Theme Selector (see Visual Components on page 621 for more information).

19.12.4.2.1. Styles

Click the plus sign in front of a Theme to see all the styles for that Theme. The figure below shows the styles included in “Green” theme. This means that when the “Green” theme is in use, the visual components (and free-form text) can be assign any of these look-and-feel definitions.

To set a style for a visual component:

1. Double-click the component (or right-click and choose **Properties**).

   The Properties list opens as shown in the figure below.

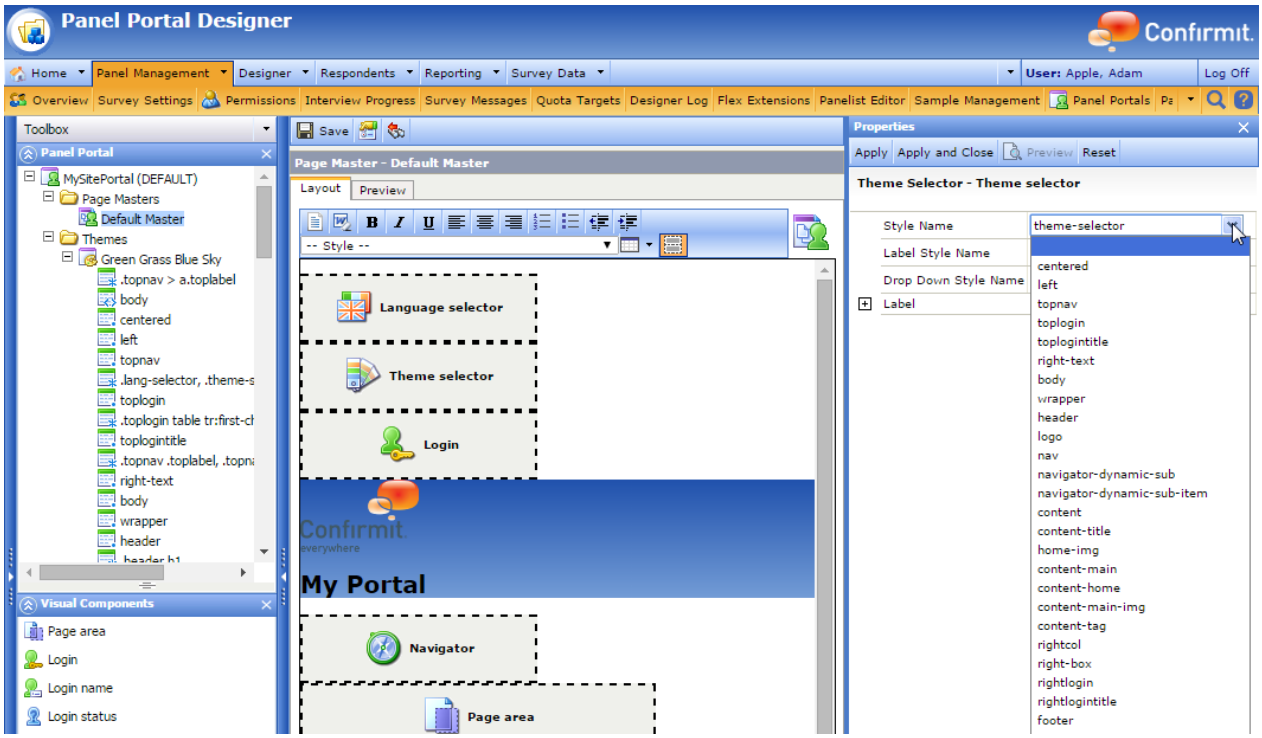


Figure 658 Applying a style for a Visual Component

2. Click the down-arrow beside the Style Name field and select from the list the style you wish to use for this component, then click **Apply**.

   Note that only class styles can be selected, not tag, id or complex.

A style has its own properties.

1. In the Panel Portal toolbox, double-click on the style (or right-click the style and choose **Properties**).

   The style designer opens up in the frame on the right.

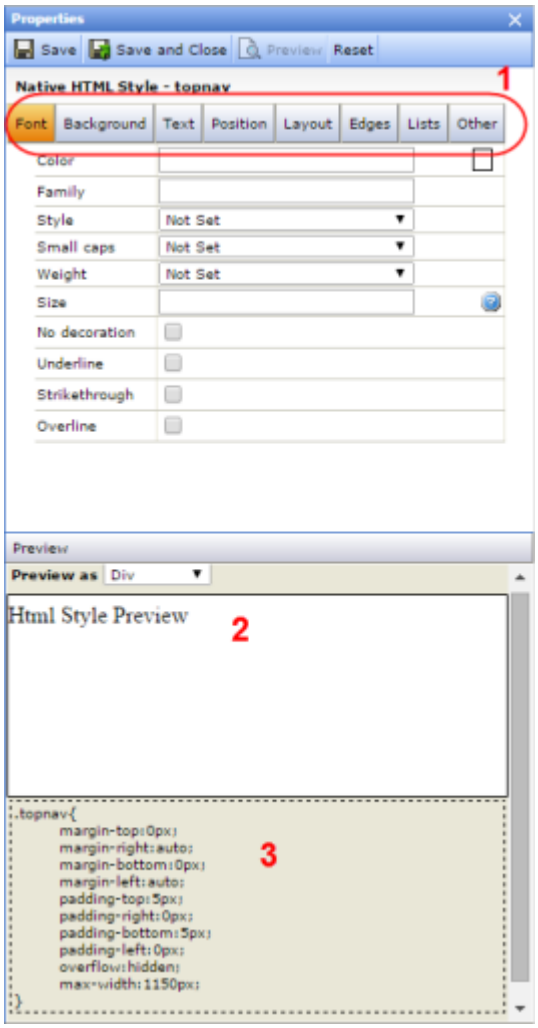


Figure 659 Working with Styles

The figure shows properties for the “topnav” style. The property tab bar (1) provides access to a wide variety of settings for each style.

Whenever you change a setting, Confirmit gives you an instant preview (2) of the style do that you can see how each setting affects the style. Also, when making changes to a style, each alteration (setting) is listed below the preview so that you at all times know which settings have been set for that style (3) (see Visual Components on page 621 for more information).

19.12.4.2.2. Set as Default

You can set a Theme to be default. The default Theme will always be used unless another theme is specifically chosen by panelists.

To set a Theme as Default:

1. In the Panel Portal toolbox, right-click on the desired Theme.
2. Choose **Set as Default** from the drop-down menu.

   The text “DEFAULT” is displayed next to the default theme inside the Panel Portal toolbox.

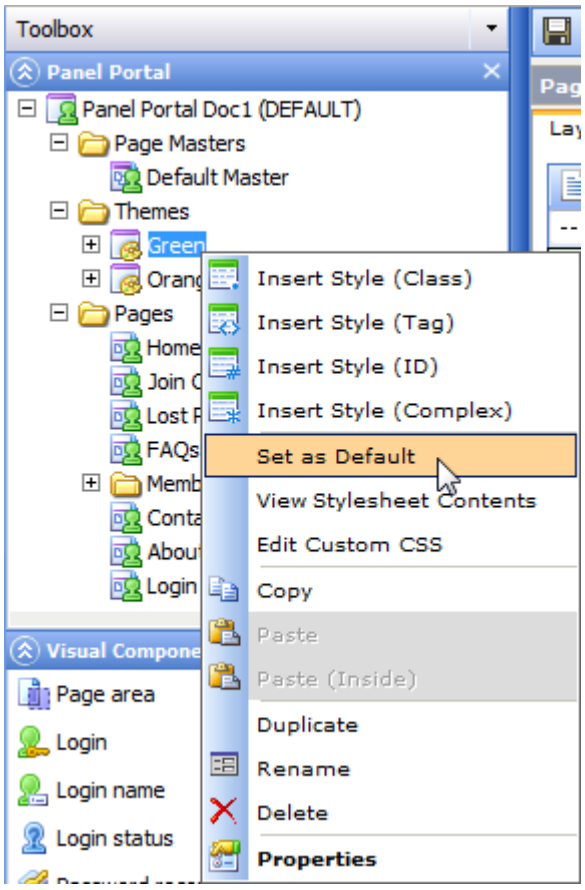


Figure 660 Setting a theme as Default

19.12.4.2.3. View Stylesheet Contents

You can view the styles in a theme. This is very helpful if you wish to find the definitions of all styles, typically for use outside this theme. To view the styles:

- Right-click a Theme and choose **View Stylesheet Contents** from the drop-down menu.

  Confirmit will then show all the styles for that Theme, as in the example below.

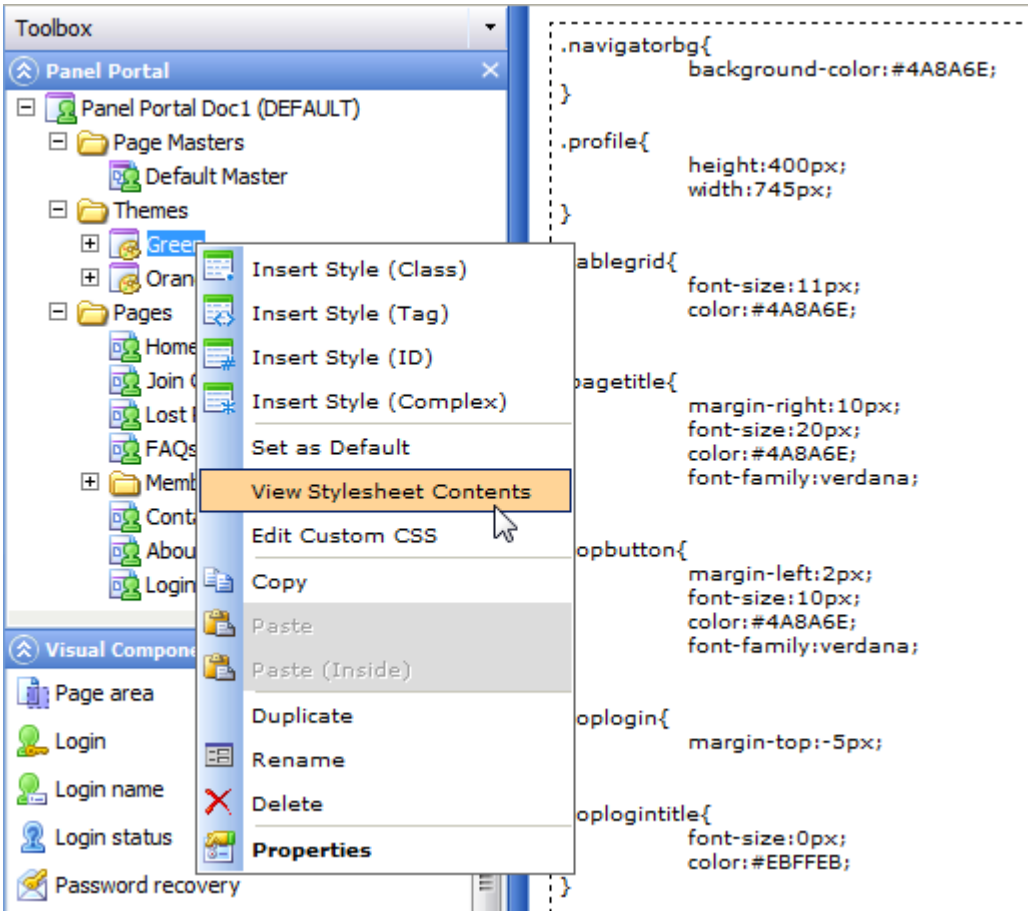


Figure 661 Selecting View Stylesheet Contents

19.12.4.2.4. Edit Custom CSS

Right-click on a theme and select **Edit Custom CSS** to open the Edit custom CSS overlay.

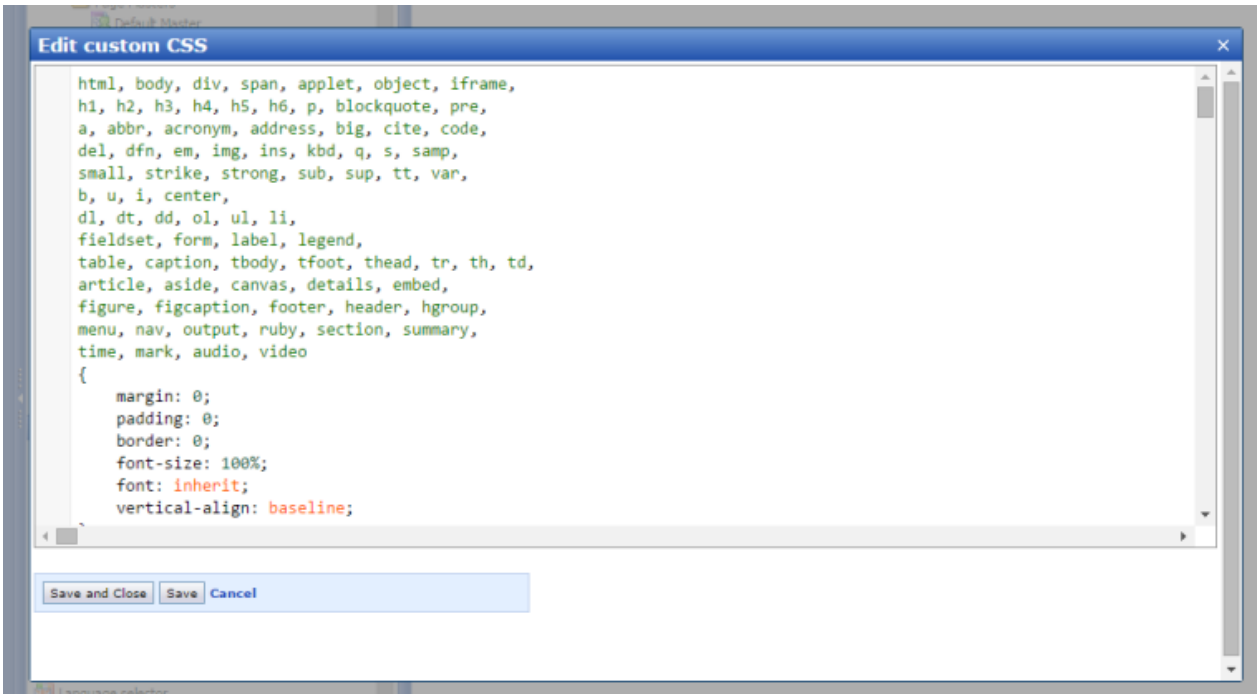


Figure 662 Example of the Edit Custom CSS overlay

As the theme editing functionality is rather limited, this overlay allows you to manually edit the stylesheet and add you own style codes. Note that you should have some experience with stylesheets and HTML coding before you attempt to use this functionality. The links below may be useful if you wish to learn more about CSS and HTML:

https://developer.mozilla.org/en-US/docs/Web/CSS

https://developer.mozilla.org/en-US/docs/Web/HTML

19.12.4.3. Pages

The third main folder inside the Panel Portal toolbox is the “Pages” folder. This is where you set up all your portal pages. To create a new page, right-click on **Pages** in the Panel Portal toolbox and choose **Insert**, or right-click an existing page and choose **Duplicate**. The figure below is a preview of the page “Home”.

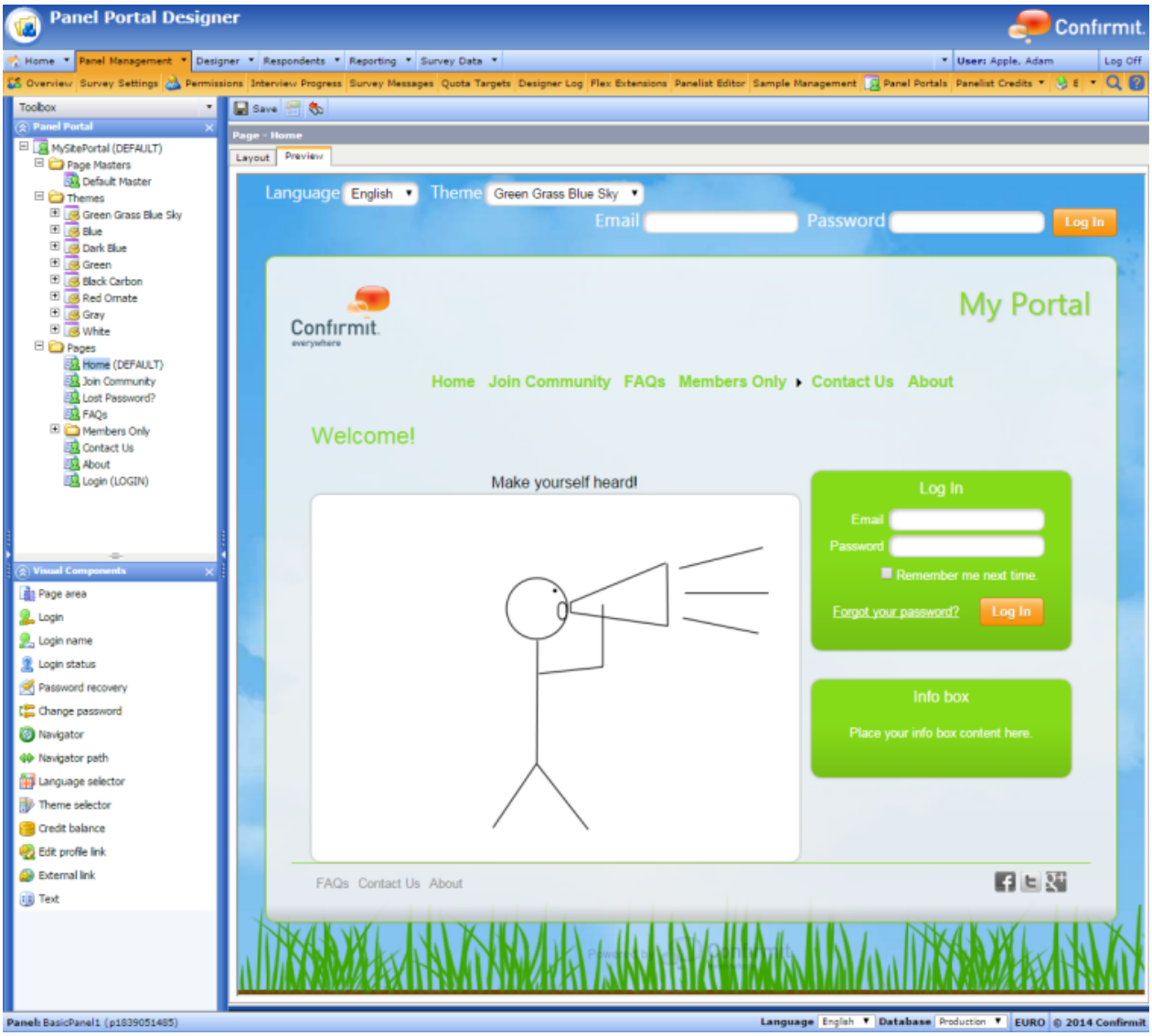


Figure 663 Previewing a portal page

To see the page set-up, click the **Layout** tab.

19.12.4.3.1. Editing a Page

If we enter the page called “Home”, and click the “Layout” tab, we are taken to the Portal Designer of that page. This is where you choose which Visual Components are to be used on that page, and the components' positions on the page.

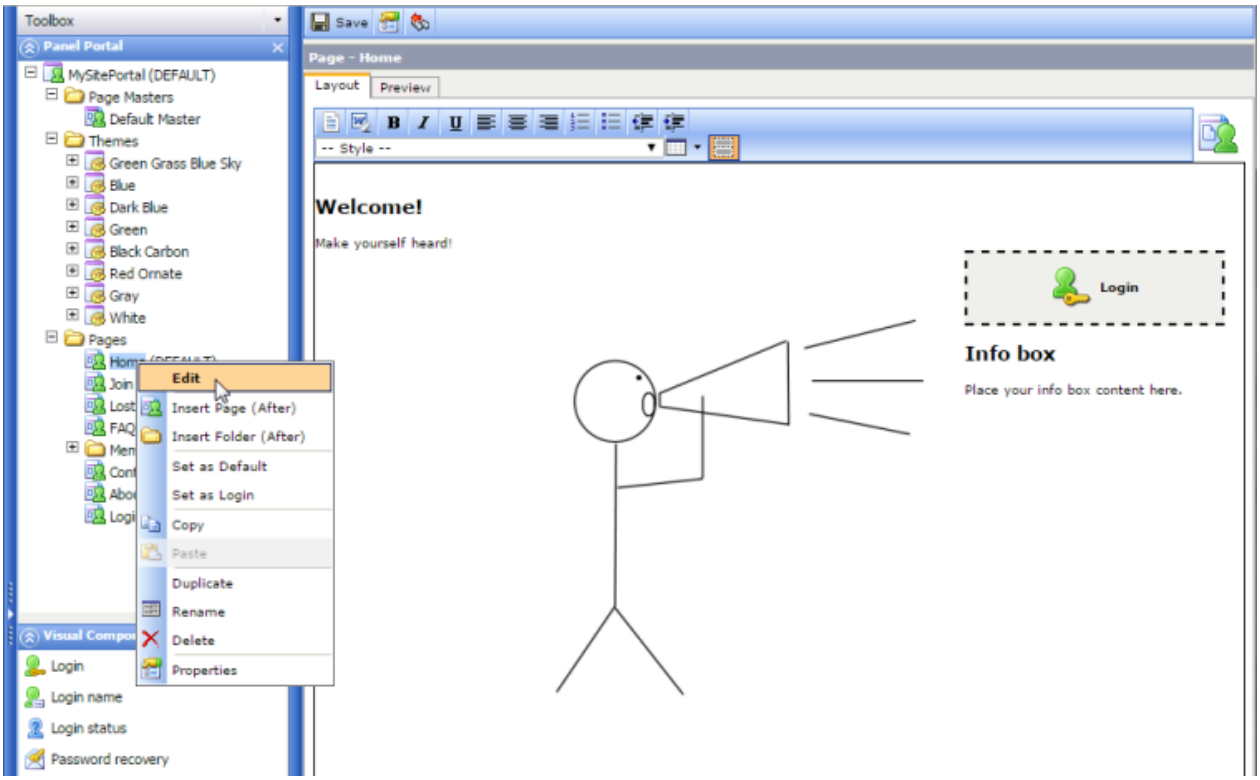


Figure 664 Editing a Page

Assume that on this page we want to show some text (the text element), an external link, and a link to the page called “Login”. We have also inserted an image on the page. We have right-clicked on the page, and under page properties, set the Page Master for this page to be “Default Master” (see Page Masters on page 609 for more information). As is shown in the Visual Components section, the element called “Page Area” determines where the page (portal page) is to be located on the overall page (Page Master).

In other words, overall browser views are set up as Page Masters, and the individual portal pages are set up under “Pages”. For each page you assign a Page Master (if you do not do this then the default Page Master will be used). The portal pages will always appear on the screen where the Visual Component “Page Area” is placed (see the figure below). Compare the figure in the previous section with the figures here. The figure below holds the overall look-and-feel (the various selectors, navigators etc.), and the portal page “Home” is placed where the Page Area element is (see Pages on page 615 for more information).

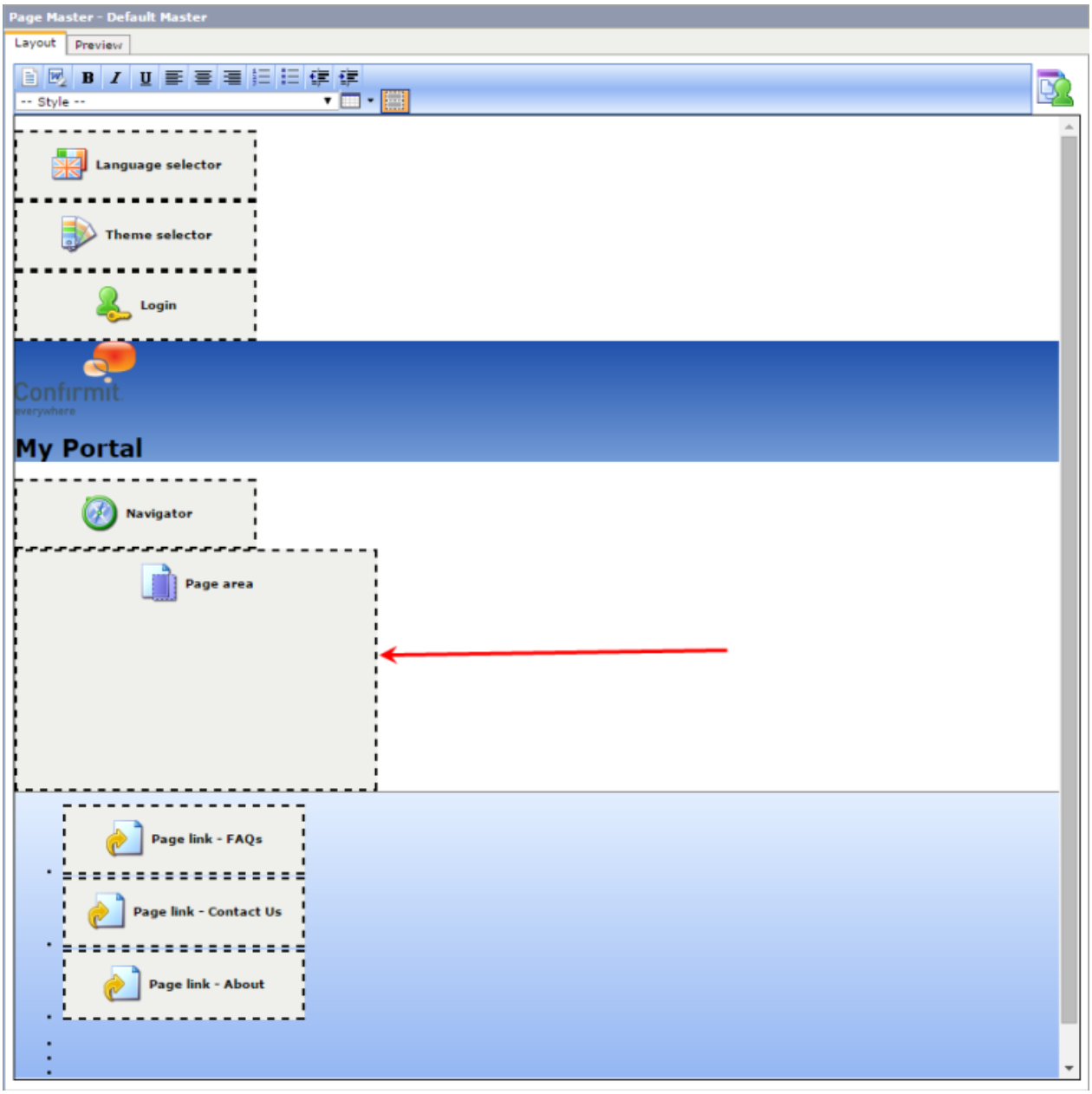


Figure 665 The location of the Page Area component in the page master

19.12.4.3.2. Set as Default / Set as Login

In the same way as one Theme is set to be default, one page is also set as default; for example the starting page (home page). To do this, right-click on the page and choose **Set as Default**. Confirmit will show the default page each time a new visitor enters the portal.

The page you wish to use as the login page must also be specified. To do this, right-click the desired page and select **Set as Login**. Confirmit will display the text “LOGIN” next to the login page in the Panel Portal toolbox.

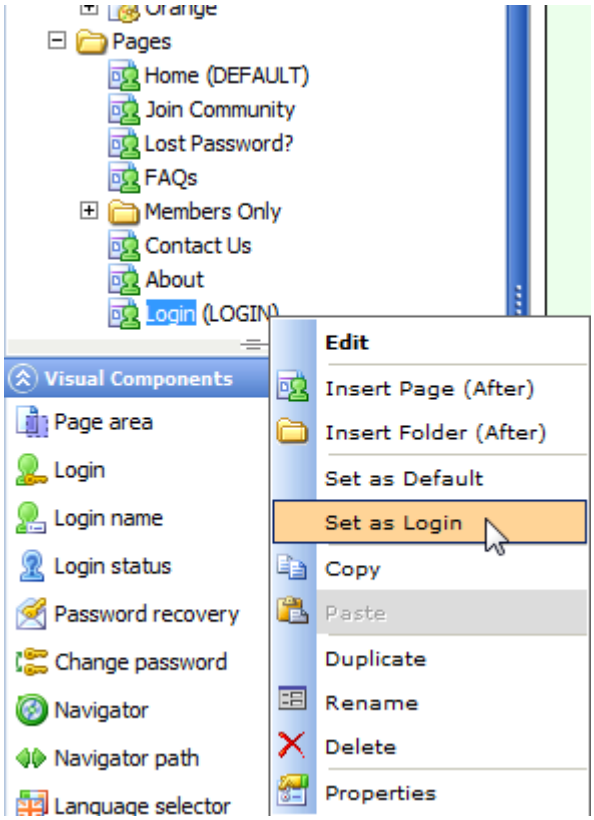


Figure 666 Selecting Set as Login

19.12.4.3.3. Folders

Folders are used inside the “Pages” section to create a menu system for the portal pages. Each folder used will be a menu item in the portal menu bar, and the pages within the folder will be submenu items. To create a folder:

1. Right-click on an item in the toolbox below which you wish to create the folder, then select **Insert Folder (After)** to insert a new folder.
2. To place pages inside the folder, either right-click on the folder and select **Insert Page (Inside)**, or drag-and-drop existing pages into the folder.

You can create folders within folders. Note in the figure below how the pages “Home”, “Join Community”, and “FAQs” come up as separate pages on the menu bar. The folder “Members Only” then creates a drop-down menu that leads to all the pages inside the folder. The page “Lost Password” has been set to “Invisible” under page properties, so it does not show in the preview here. The login page is treated differently. This page only shows when the user attempts to enter a restricted page.

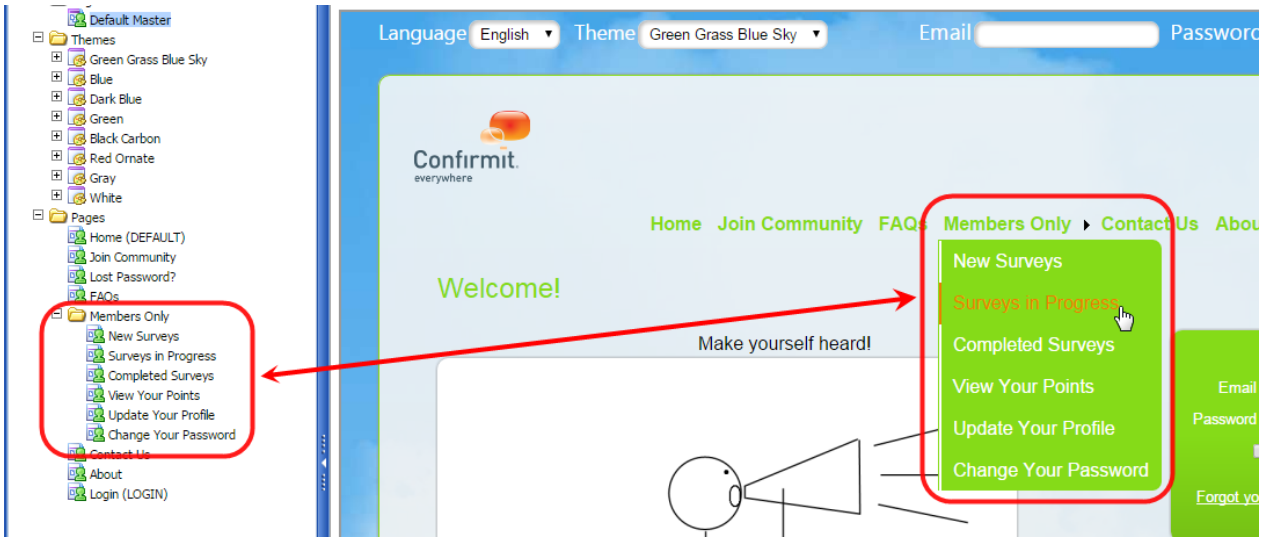


Figure 667 Using Folders and pages to create menus and sub-menus for the respondent

19.12.4.3.4. Page Properties

To alter properties for a portal page, right-click on the page in the toolbox and choose **Properties** from the drop-down menu. The Page Properties page opens.

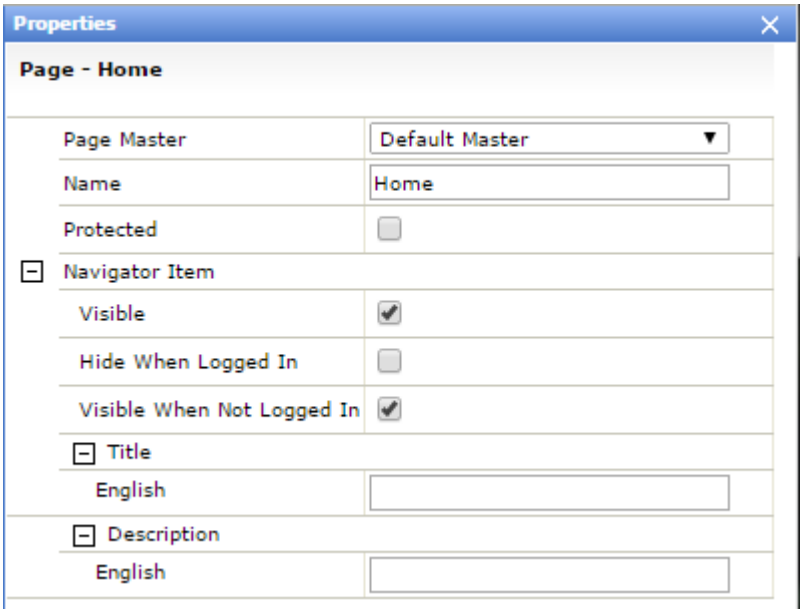


Figure 668 The Page Properties page

- To specify which **Page Master** is to be used for the page (see Page Masters on page 609 for more information)
- If you want this page to be accessible only to people who are logged in, check the **Protected** property. If a page is not protected, all visitors can see the page.
- Under **Navigator Item**, specify whether you want the page to be visible on the menu bar.
    - **Visible -** check the box if you want to ensure the page will be visible all the time.

- **Hide When Logged In -** if you have a page that you do not want to be visible to people who are logged in, check this box.
- **Visible when not logged in -** uncheck the box for pages you want to hide to all people not logged in. The page is then available only for people who are logged in.

- Use the **Title** fields to specify what you want the page to be called in each portal language.
- Use the **Description** fields to specify the text that is to appear when people point to the page on their screens (mouse-over). Again, there will be a text field for each portal language.

19.12.4.4. Visual Components

The Visual Components are elements you can use on one or more portal pages. To place a visual component onto a page, drag the component from the toolbox and drop it onto the page where you want to use the elements. You can also right-click on a page, and choose **Insert Visual Component**.

When a component has been added to a page, you can double-click the element (or right-click and choose **Properties**) to open the Properties page for the element and determine layout and functionality for it.

19.12.4.4.1. Page Area

The “Page Area” component determines where the page (portal page) is to be located on the overall page (Page Master) (see Editing a Page on page 616 for more information).

19.12.4.4.2. Login

The Login element displays the username and password text-fields to the panelists.

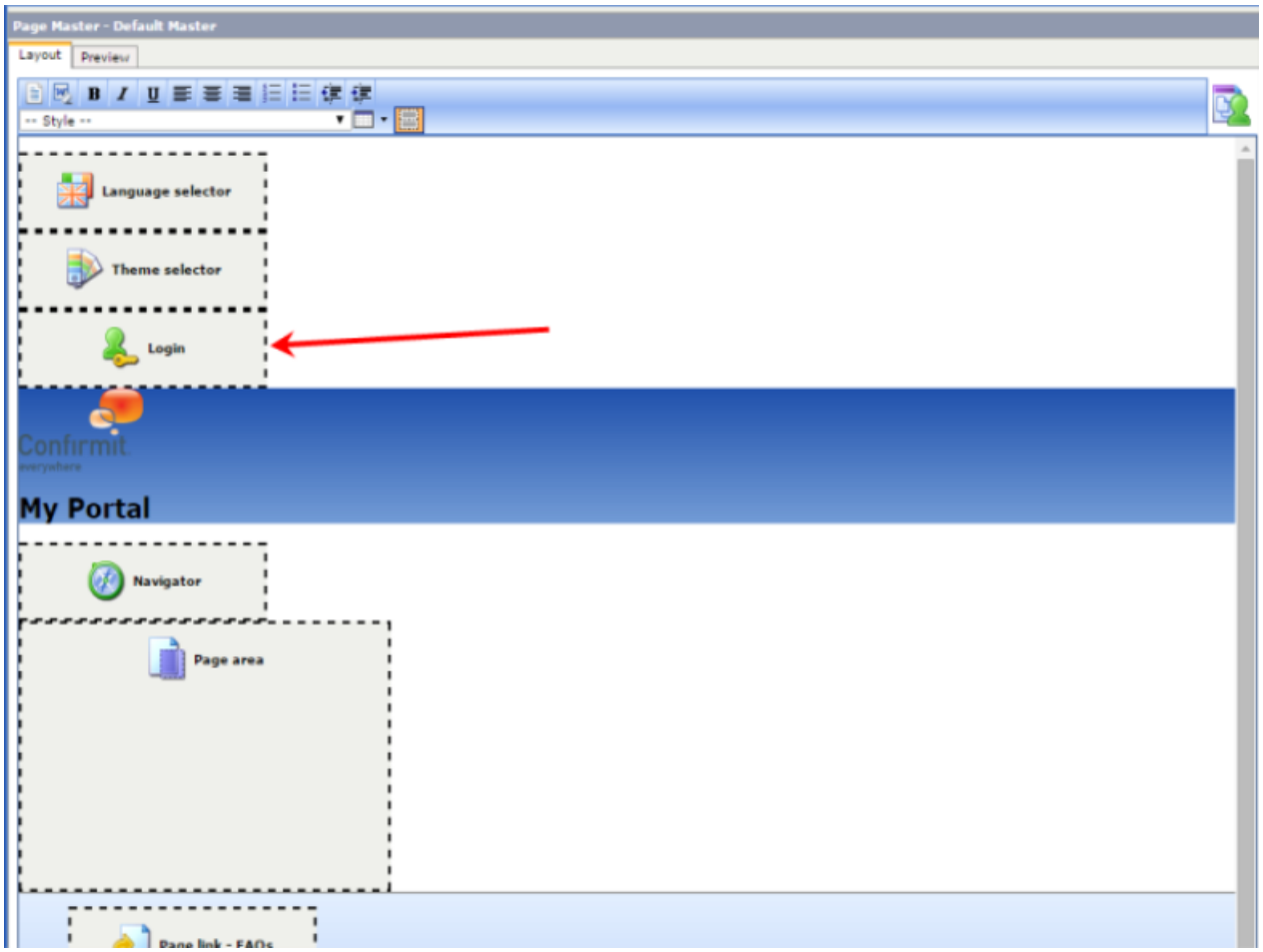


Figure 669 Example of a page master with the Login element

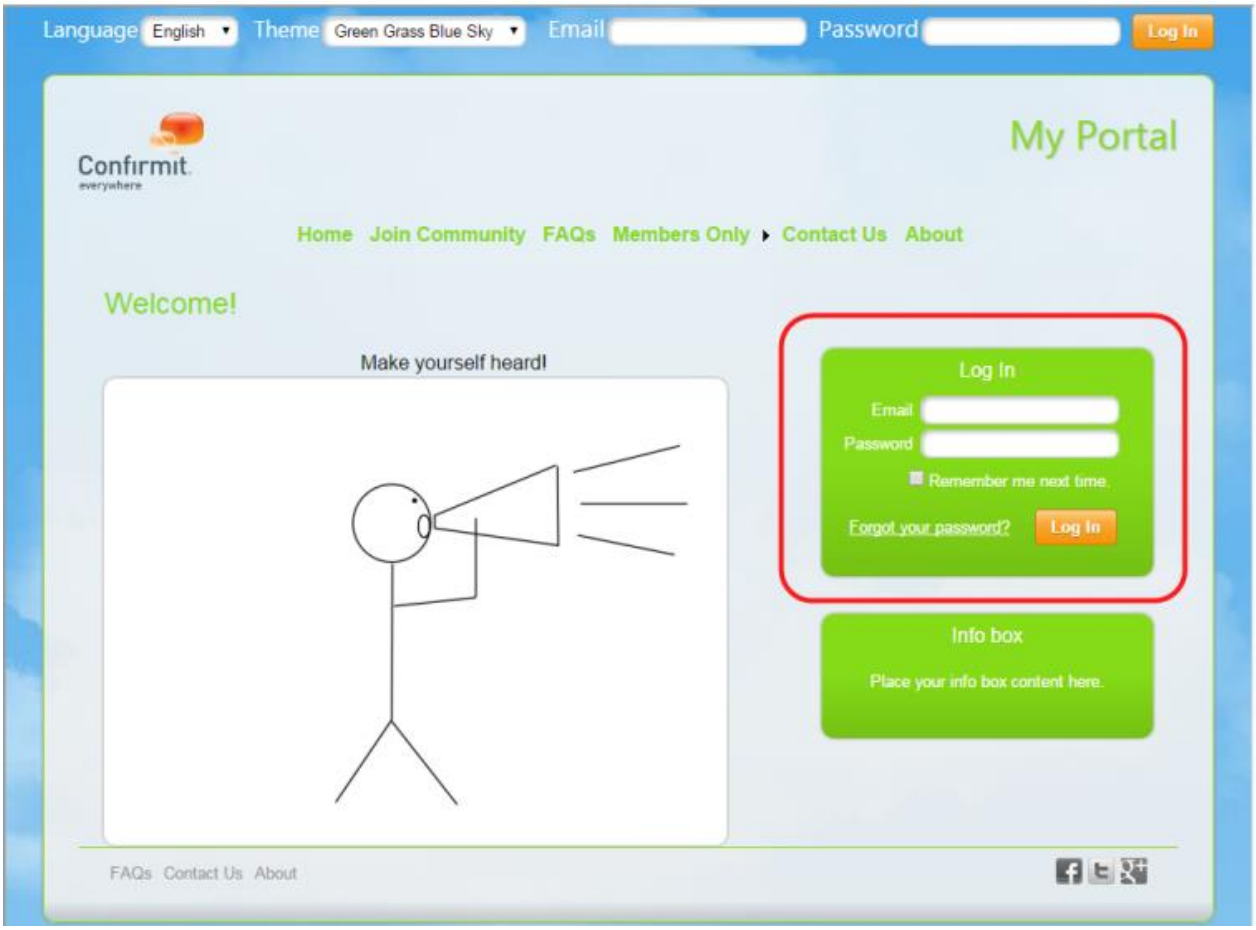


Figure 670 And how the login element will look to the panelist

You set up the login element using its Properties sheet (right-click on the element on the page and select **Properties**).

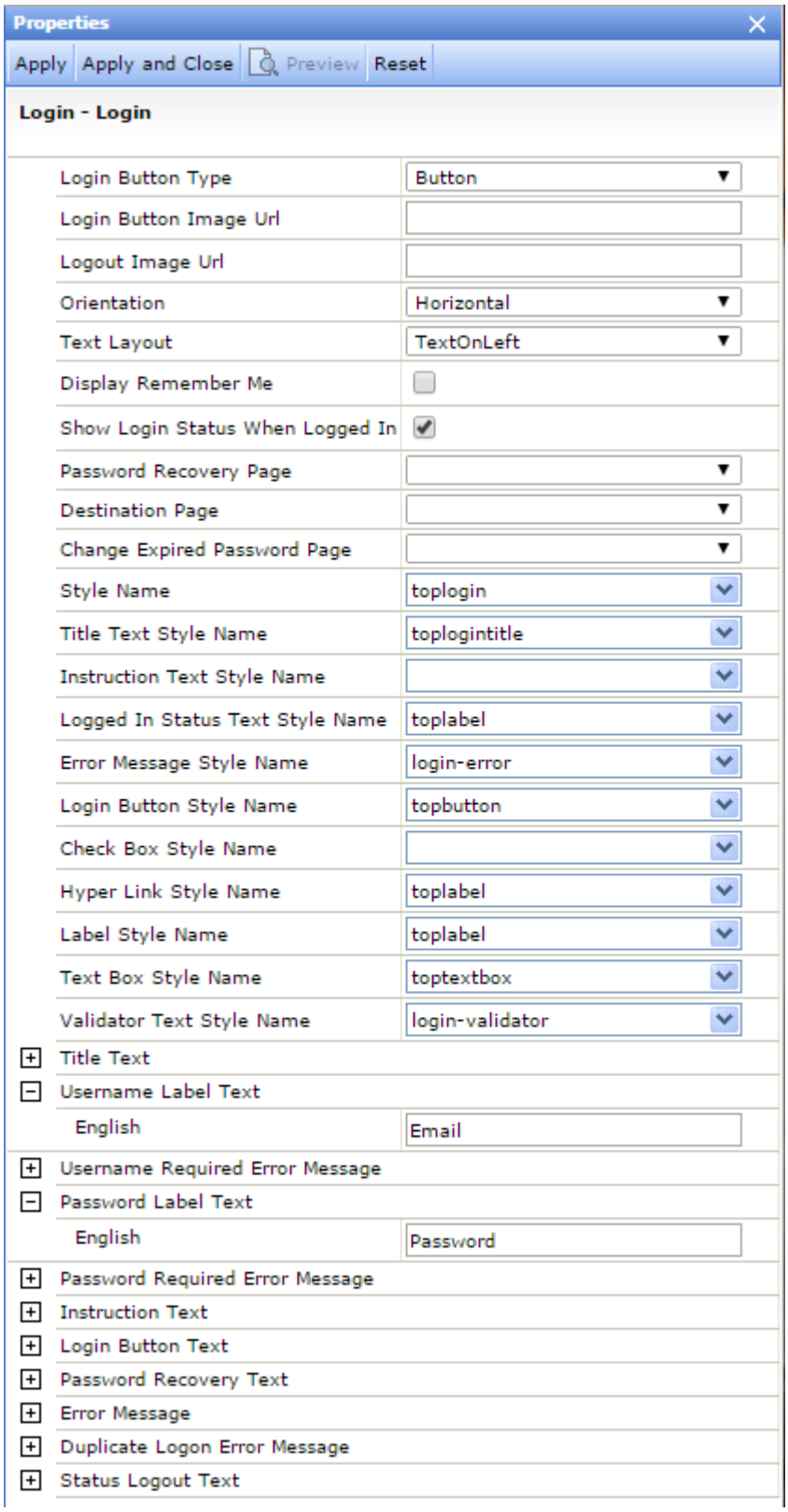


Figure 671 The Login element's Properties sheet

19.12.4.4.3. Login name

The “Login name” element shows the username of the panelist after he/she logs in. In the figure below, the properties of the “Login name” element are being set. In the example below a custom text string (Format String) is entered so when for example Peter Jones logs in with his username “peterj”, the English text becomes “Welcome peterj!”

Currently, the “username” is the only element that can be piped into the Login name component.

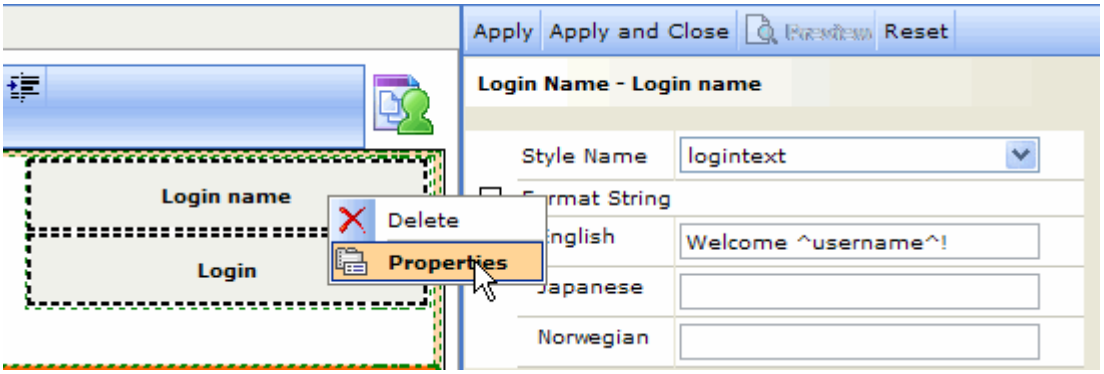


Figure 672 Setting the Login name properties

19.12.4.4.4. Login Status

The “Login Status” component allows you to place a hyperlink to a login page anywhere in your portal. This element is often used in combination with the “Show Login Status When Logged In” property on the “Login” element.

If this property is checked on the Login element, and the Login element is always displayed on screen (normally part of the Page Master), then the Login status element cannot be used.

19.12.4.4.5. Password Recovery

In the event a panelist forgets their password, the Password Recovery element enables the panelist to request that their password to be sent to their registered email address. This obviously requires that the person has previously registered as a panelist.

The Properties sheet for the Password Recovery element includes a number of different text fields; one field for each selected language for each property. Note that you can use text piping in the Email Subject, Email Plain Text Body and HTML Body fields. The primitives ^username^ and ^link^ can be used here to pipe the username and link information into specific places in the text that you type into these fields.

19.12.4.4.6. Change Password

This element allows the panelist to change his or her password at any time.

19.12.4.4.7. Navigator and Navigator Path

The Navigator element determines where on the page the menu is displayed. The Navigator path displays the route through the menu system to the current page. All the pages in the path are links, allowing the panelist to jump back to any page in the path by clicking on the link.

19.12.4.4.8. Language selector

The Language Selector element enables the panelists and other visitors to your portal to choose the language their portal will be presented in.



Figure 673 Example of the Language Selector element in use

19.12.4.4.9. Theme selector

Use a Theme Selector element to allow the panelists and other visitors to your portal to choose which theme is to be used to present their portal (see Themes on page 610 for more information).

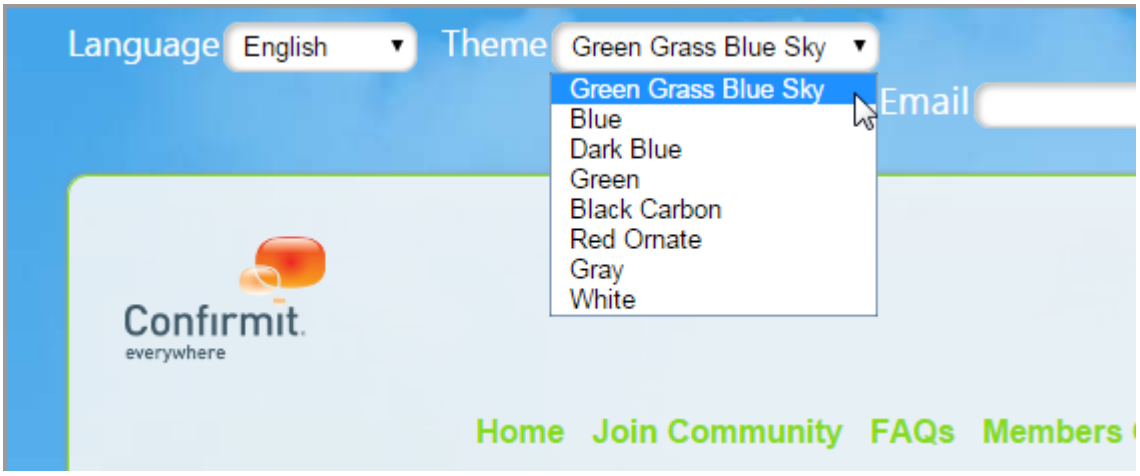


Figure 674 Example of the Theme selector in use

19.12.4.4.10. Surveys List

The Surveys List component positions and defines the layout and content of the list of surveys available to the respondent on the page. Add the component to the portal page (drag and drop from the Visual Components toolbox), save the page, then double-click on the component to open its Properties pane.

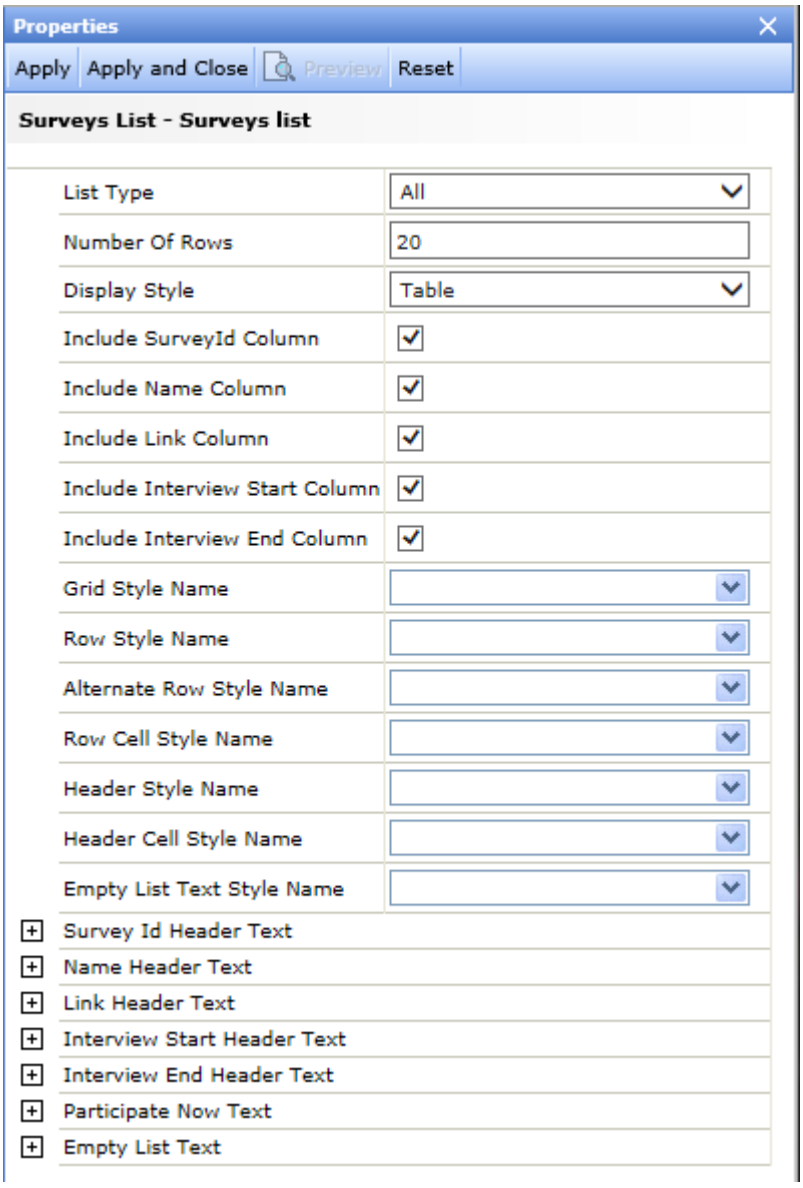


Figure 675 The Survey Lists component properties pane

- **List Type -** specify the status(s) of the surveys that you want the list to display.
- **Number of Rows -** specify the number of list rows you want to be displayed at one time. In the event the list contains more surveys than can be listed, the list will be divided into pages.
- **Display Style -** determines how the survey list is rendered; either as an HTML table <table> or HTML List <ul>. Mobile portals will default to List, but both Desktop or Mobile can use either rendering option.
- Check the boxes for the columns you wish to include in the list.
- Specify the styles to be used for the various parts of the list.
- You can provide translations for the column header texts. One text field will be available for each language selected for the portal.

19.12.4.4.11. Credit Balance

Confirmit keeps track of points earned for panelist participation. Use the “Credit balance” element to display the current number of earned points. In the example below, the element has been placed in the “Your Points” page. When panelists go to this page, they will see the sentence “You have earned N points so far.” The variable N will display the credit balance, starting at zero.

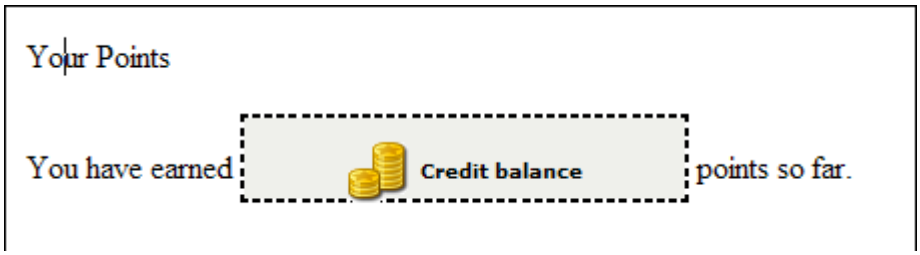


Figure 676 Example of using the Credit Balance element

Note: For Panelist Credits, a 'pending' flag is set when points are assigned to a respondent. From Confirmit v15 this flag is removed (so the points are awarded) when the respondent's status is changed via the SetStatus function or when the respondent reaches a Stop node. Therefore points will also be counted for respondents who receive statuses such as "Screened" or "Quota full".

19.12.4.4.12. Edit Profile Link

Your panelists's circumstances will change during the life of your panel, and they should have the opportunity to change their profile, for example their home town, their age, whether or not they are married etc. The registration survey they answered when signing up as a panelist is available to the panelists at all times via the “Edit profile” element. When panelists navigate to this page, they can update their details so that the next time the panel is sampled for respondents to a particular survey, the group of respondents found for that survey are optimized.



Figure 677 In this case the Update Your Profile link is placed in the Members Only menu

When the panelist goes to the **Members Only > Update Your Profile** menu command, he/she is taken to the appropriate portal page and the survey is run.

19.12.4.4.13. External link

You can insert hyperlinks on your portal pages. To do this:

1. Drag the “External link” element from the Visual Component toolbox onto the page.
2. Double-click the element (or right-click and choose **Properties**) to open the Properties page.
3. Set the properties for the element, and specify the URL you wish the link to go to.

19.12.4.4.14. Text

The Text visual component is used to display text on a portal page. You can enter text directly onto a page (see Free-form Text on page 645 for more information), however if you do the text will be the same for all panelists regardless of language. If you use the Text element, you can then specify the text for each language selected for the portal, and Confirmit will display the text in the language chosen by the panelist via the Language Selector (see Language selector on page 625 for more information)

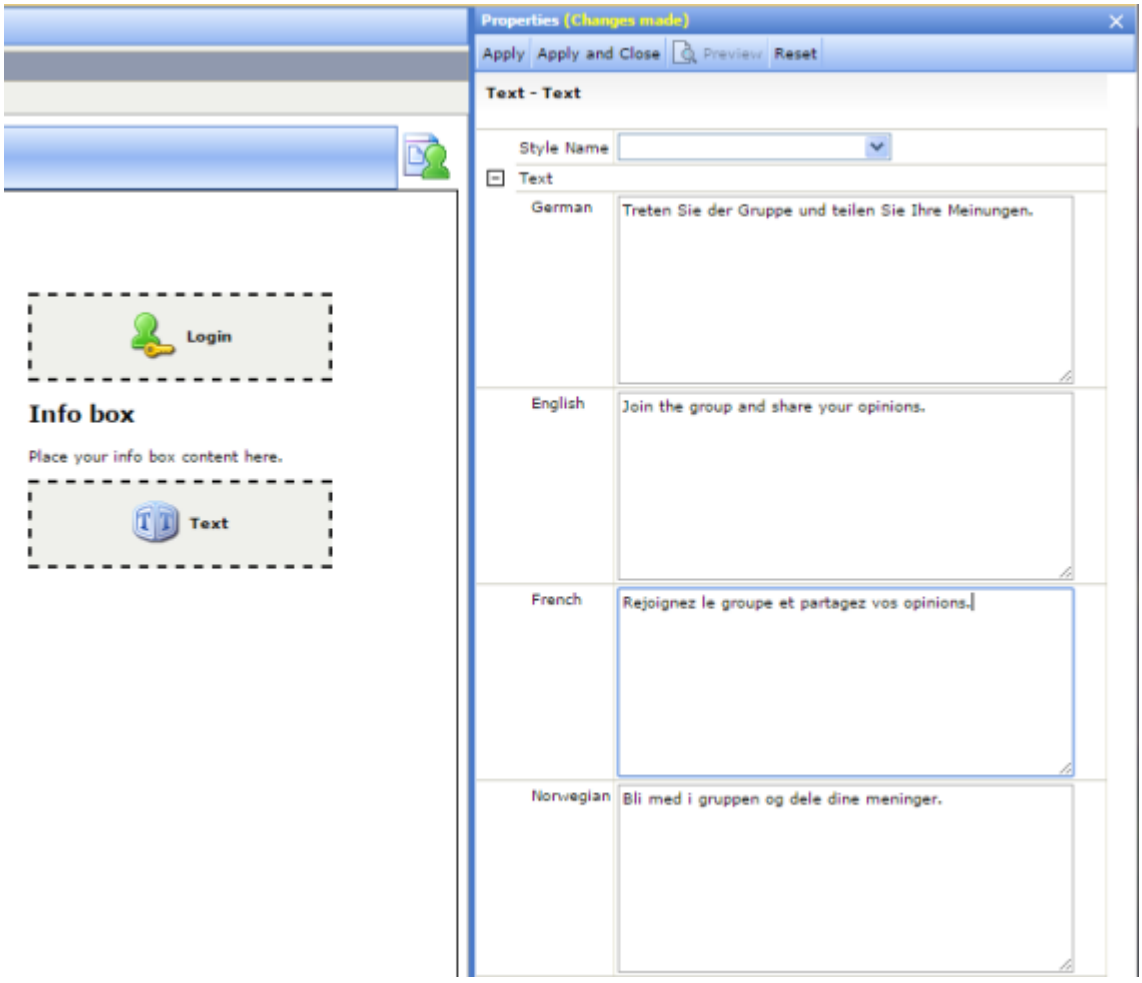


Figure 678 Language transparent text element

19.12.4.4.15. Page Link

In addition to the Visual Components, you can drag a page directly onto another page to make a direct “go to page" link. Confirmit creates a hyperlink to the dragged page where the page was dropped. The panelist can then click the hyperlink to navigate to that page.

In our example portal we are using direct “Page links” inside the Page Master. The three links in the lower-left corner are all direct links, dragged onto the Page Master directly from the toolbox. Double-click on the element (or right-click and choose **Properties**) to set visibility, style, titles for each selected language), and descriptions (also for each selected language).

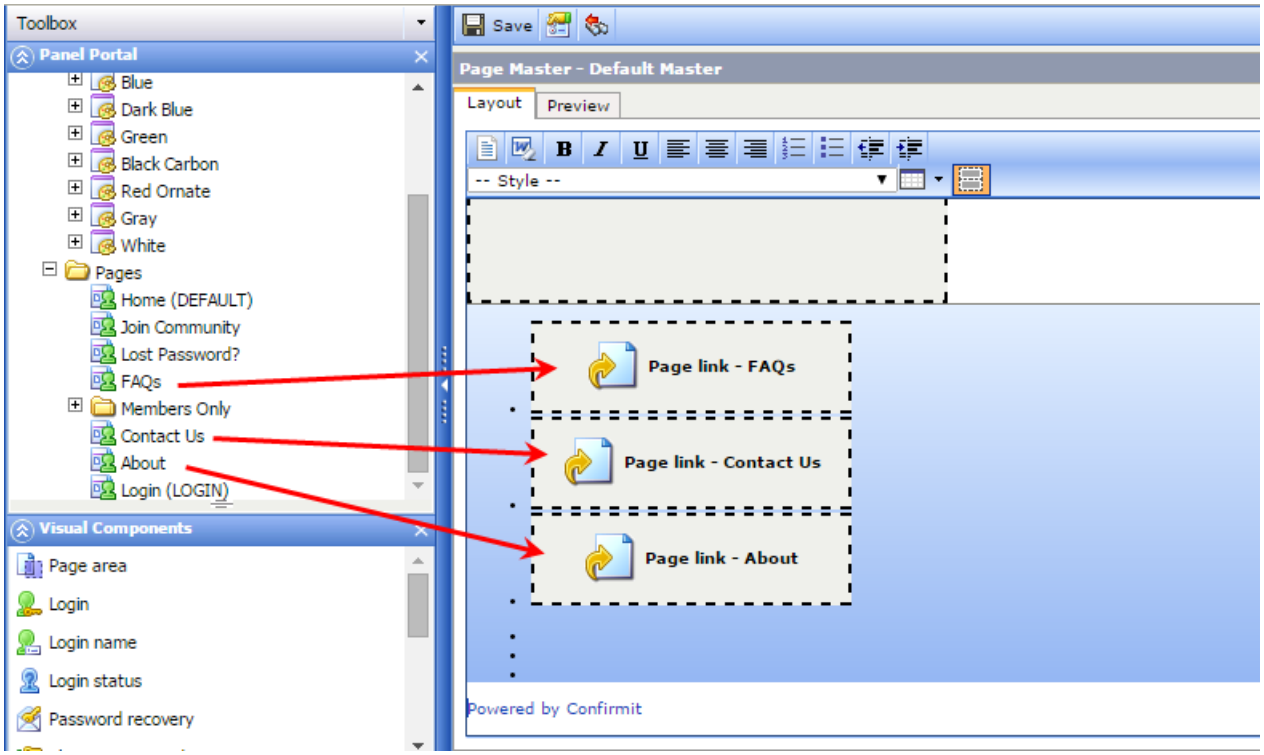


Figure 679 Example of Direct Page linking

19.12.4.4.16. Poll

This component allows you to add a poll to the portal (see Poll Surveys on page 335 for more information).

19.12.4.5. Properties on a Panel Portal

To open the portal Properties page, right-click on the portal name and choose **Properties**.

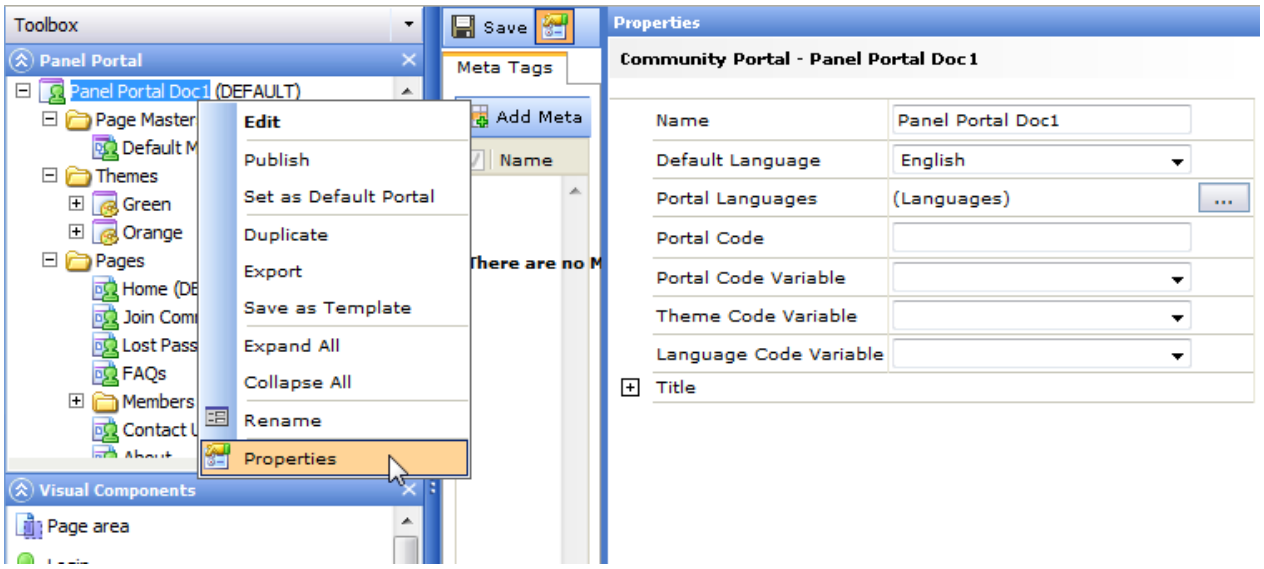


Figure 680 Properties on portal level

- **Name** - The name of the portal is displayed at the top of the property sheet. You can edit this here if necessary.
- **Default Language** - the language in which the portal will be displayed when the panelist first goes to the portal and before he/she has logged on, generally throughout the portal if nothing else is specified, or if texts for a different specified language do not exist.
- **Portal Languages** - select the languages that are to be available to the panelists. Click the ellipses button to open a selection window.
- **Portal Code** - the "ID" code for this portal. The portal can then be selected automatically .
- **Portal Code Variable** - only active for the default portal. Select the variable, the answer codes of which will control the portal to be used.
- **Theme Code Variable** - Select the variable, the answer codes of which will control the theme to be used.
- **Language Code Variable** - Select the variable, the answer codes of which will control the language to be used.
- **Title** - you can specify language-specific titles for the portal. These will be displayed to the panelists and other visitors depending on which language they select.

The Portal Code and the three ...Variable properties are used to select the portal, theme and language automatically (see Dynamic Portal, Theme and Language on page 631 for more information).

19.12.4.6. Dynamic Portal, Theme and Language

You can have several portals linked to the same panel, and each portal can have multiple themes and languages. This makes it possible to customize different interfaces for different groups of panelists. To assist the panelist with selecting the desired theme and language, you can include a “Theme selector” and a “Language selector” (visual components) within the portal pages.

The portal, theme and/or language to be used can be set via panel variables, or they can be set by including parameters in the portal URL. When these options are set they are stored in a cookie, so that the next time the panel is opened it will use the same portal, theme and/or language, unless it is overridden by a parameter or panel variable.

19.12.4.6.1. Setting Portal, Theme and Language Via Parameters in the URL

- The code identifying the portal is set in the Portal properties (the Portal Code property). If this property is set to 1 for a particular portal, you can add **pc=1** to the portal link (pc for portal code) to open this portal, for example:

```
http://survey.confirmit.com/communities/default.aspx?p=pXXXXXXXX&pc=1
```

If nothing is set, the default portal will open.

- The code identifying the theme is set in the Theme properties for the portal ("Theme code"). If this is set to **red** for a theme, you can add **tc=red** to the portal link (tc for theme code) to open the portal with this theme, for example:

```
http://survey.confirmit.com/communities/default.aspx?p=pXXXXXXXX&tc=red
```

- The code identifying the language will be the standard Confirmit language codes (as found in **Home > Help > Language Overview**), for example **9** for English (see APPENDIX B: CONFIRMIT LANGUAGE CODES on page 851 for more information). You can then use l=9 (l for language) to open the portal with English as the language:

```
http://survey.confirmit.com/communities/default.aspx?p=pXXXXXXXX&l=9
```

These three codes can also be used in combination, for example:

```
http://survey.confirmit.com/communities/default.aspx?p=pXXXXXXXX&pc=1&tc=red&l=9
```

Note: The language, portal and theme codes are all optional. If your portal(s) are just in one language, you do not need to use language codes. If you just have one portal, or just one theme within the portal(s) you do not need to provide portal codes or theme codes.

19.12.4.6.2. Setting Via Panel Variables

The language, portal and theme can also be set using panel variables. In the portal properties you can specify panel variables that can be used to determine which language, theme or portal is to be used for a particular panelist. These settings are made in the Portal Code Variable, Theme Code Variable and Language Code Variable fields. These are all optional settings, but if they are used, then once the panelist has logged on the system will automatically open the portal, theme and/or language according to the codes set for that panelist in the variables specified.

Instead of specifying a particular portal for the panelists, you can allow the portal, the theme and/or the language to be selected automatically for the individual panelist, based on the panelist's answers to a previous question, or a background question, or a combination of these. This is set up in the portal's Properties page.

Important:
The codes on the questions used for "Portal Code Variable", "Theme Code Variable" and "Language Code Variable" must match the codes for the portals, themes and languages in the Portal.

The Portal Code Variable must be the same for all portals (it is the codes that are different), so you can therefore only change it on the default portal. It is this portal that opens when a panelist first accesses the site but before he/she has logged on. Once the panelist has logged on via the default portal, Confirmit will check the panelist's data against the settings here and will switch to the specified portal. The theme and language can be set separately within any portal.

Note: You must have a question in the panel that includes as its answers all the possible options that you wish to use to call the various portals. The codes of the answer options will be used to specify which portal is used, or the theme and/or language for the portal. Once the question and its answer codes exist...

1. Go to the Panel Portal, right click on the portal name in the Panel Portal toolbox and select **Properties**.

   The Properties page opens.

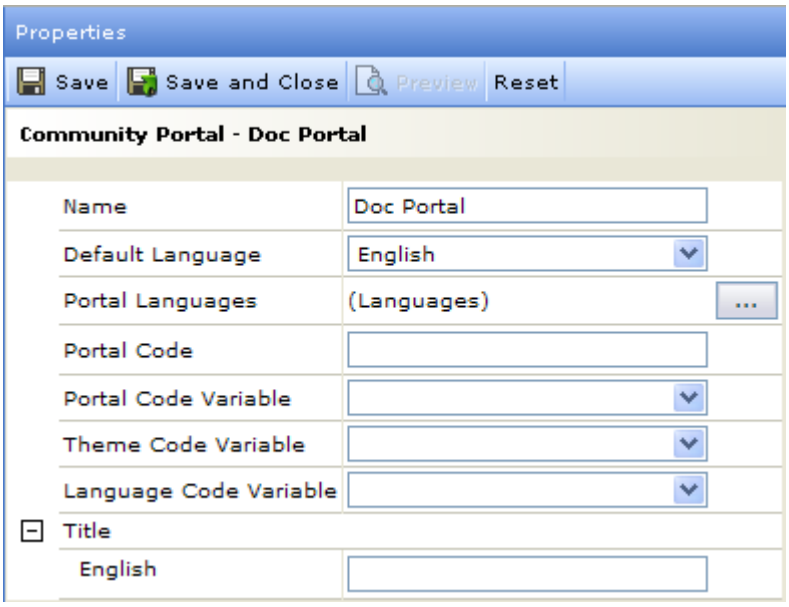


Figure 681 Selecting the Portal Code Variable

To select a portal for a respondent based on the respondent's answer to a variable:

2. Click the down-arrow beside the Portal Code Variable field and select from the drop-down list the variable you wish to use as the basis of the selection.

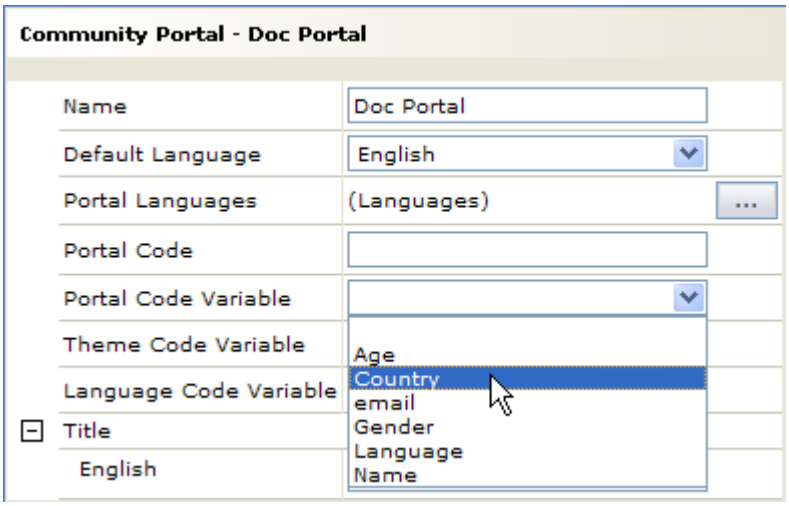


Figure 682 Selecting a variable from the drop-down list of those available in the attached panel

The drop-down list will include all the suitable variables currently included in the Panel Portal to which the portal is attached. Note that the Panel Portal's database must be generated for new variables to be included.

3. Type into the Portal Code field the code of the answer that you wish to use to call this portal.

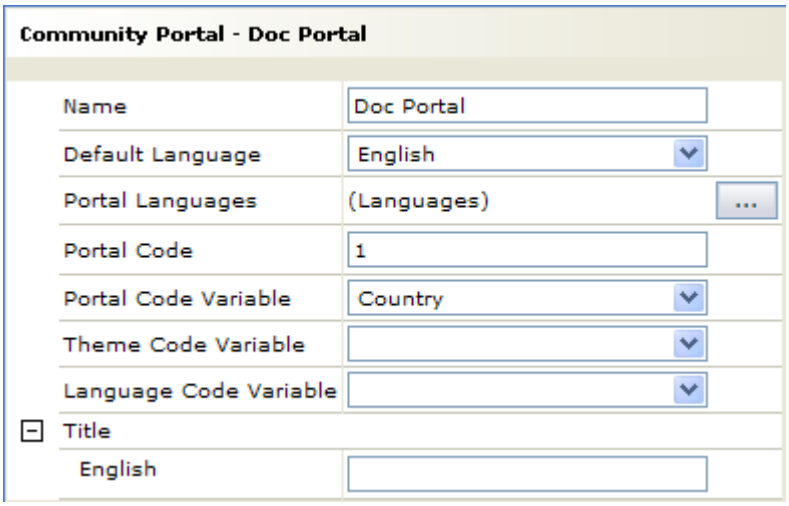


Figure 683 Adding the Portal Code Variable and the Portal Code to the Properties sheet

4. Save the changes.

Now, when a panelist logs in, Confirmit will check the answer that the panelist has provided for the selected question (in this case the Country question), and the appropriate portal will be used.

19.12.5. Managing your Panel Portals

You can create as many Panel Portals as you require. However, only one portal can be publicly active at a time on each panel. Normally, you build your portals inside the panels so that you have full control of how the portals will look.

19.12.5.1. Publish your Panel Portal

You can have as many Panel Portals you wish per panel, but only one of them can be the published one, i.e. the one used publicly for that panel. To publish a portal:

1. Enter the panel you wish to publish a portal for.
2. Go to the **Panel Management > Panel Portals** menu command.
3. In the Professional Panels List, click on the required portal to open the Panel Portal Designer window for that portal.
4. Right-click on the portal name in the Panel Portal toolbox, and choose **Publish** from the drop-down menu and then confirm the operation in the Publish Panel Portal overlay.

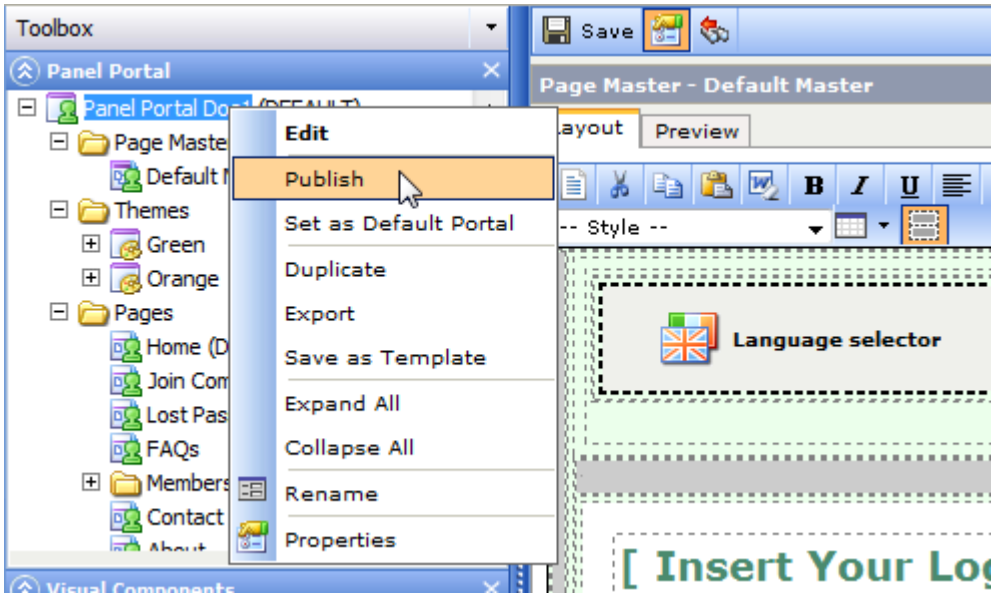


Figure 684 Publishing the portal

When you publish a portal, this will be the one used then people click the Panel Portal URL (the link will be available from the **Survey Management > Overview** page). If another portal is published for the active panel, the new portal will override the old portal as only one portal can be published at any one time.

19.12.5.2. Testing your Panel Portal

When working with your portals, you will often need to test how different portals function together with your panel. We recommend having all relevant portals added to the panel, and then in preview try the different alternatives. If you need to make changes to a portal to for example try a different look or setup, duplicate an existing portal instead of starting from the beginning.

You can also launch your panel in Test mode and publish/test a portal using the test database.

19.12.5.3. Managing your Portal within your Panel

Go to the **Panel Management > Panel Portals** menu command.

Confirmit displays a list of all portals added to the active panel.

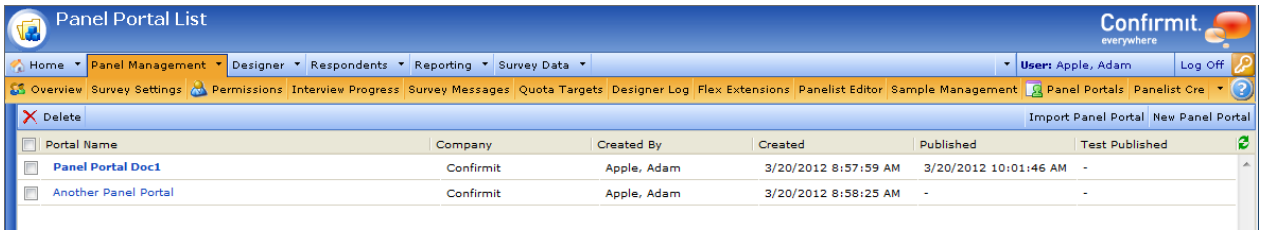


Figure 685 Example of a list of a panel's active portals

The list shows when each portal was created and by whom. The currently published portal for the panel's production database is listed in bold, and the time when the portal was last published is also shown. The “Test Published” column shows when the portal was last published on the Test database.

19.12.5.4. Managing your Panel Portal Templates

The same Panel Portal can be used on many different panels simultaneously. Whenever you save a portal as a template (see Save as Template on page 636 for more information) the portal is stored as a general (global) portal template, which later can be added to other panels.

To view a list of all such global Panel Portal templates, go to the **Home > Templates > Panel Portal** menu command.

Confirmit lists all the Panel Portal templates. These are global versions (templates), which can be added to one or more panels.

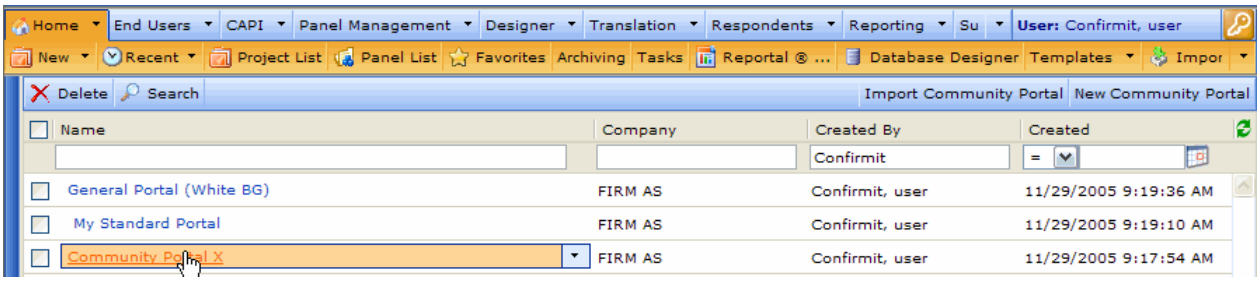


Figure 686 Example of the Panel Portal template list

To provide access to a template:

1. Right-click on the template name and choose **Permissions**.

   This opens a list of all Confirmit users in your company.

2. Check those who are to have access to use this particular template.

Note: Users with Company Administrate permission have by default access to all of the company's Panel Portal templates.

19.12.5.4.1. Save as Template

You may wish to save a portal as a template for later use. To do this:

Right-click on the portal name, and choose **Save as Template**.

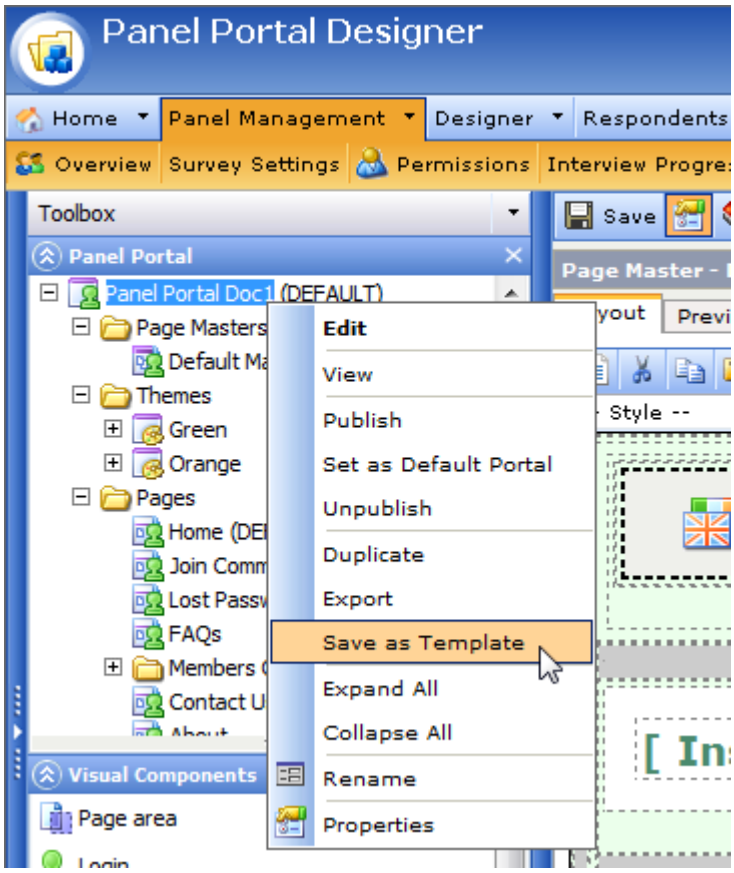


Figure 687 Saving a portal as a template

An identical copy of the current portal will then be saved as a template. If you change the copy (the template), this will not affect the original portal and vice versa.

19.12.6. Editing your Page Masters and Portal Pages

Note: Confirmit is not installed on your computer locally like an application such as MS Word normally is. In addition, no plug-ins or ActiveX components need to be downloaded in order for you to gain full functionality. Working in Confirmit means working 100% in a browser window. All formatting is done using HTML and style sheets. You use HTML style properties to position elements on the page, instead of moving them to a precise point as in for example PowerPoint.

The typical way of setting up a portal page (positioning of Visual Components) is to specify each Visual Component's position and layout by using style settings (CSS) (see Styles on page 610 for more information).

Tables should not be used purely as a means to layout document content as tables are slow to generate on-screen and they may present problems when rendering to non-visual media. Additionally, when used with graphics, these tables may force users to scroll horizontally to view a table designed on a system with a larger display. To minimize these problems, authors should use style sheets to control layout rather than tables. For further information refer to the web page at http://www.w3.org/TR/html401/present/styles.html.

Tables should only be used to present tabular data. The creation and setup processes for tables are described in the following sections. For additional information on the use of tables, refer to the web page at http://www.w3.org/TR/html401/struct/tables.html#h-11.1.

19.12.6.1. Inserting Tables

To build a table:

1. Click the **Table builder** button (marked 1 in the figure below).

   A diagram appears.

2. Move the mouse pointer over the diagram until the required number of rows and columns are highlighted, then click the mouse button.

   The figure below shows how a table of 3x3 cells is inserted. Note that you can adjust the table later by adding and deleting rows and columns. The table you create will be inserted at the cursor location at the time you click the **Table Builder** button.

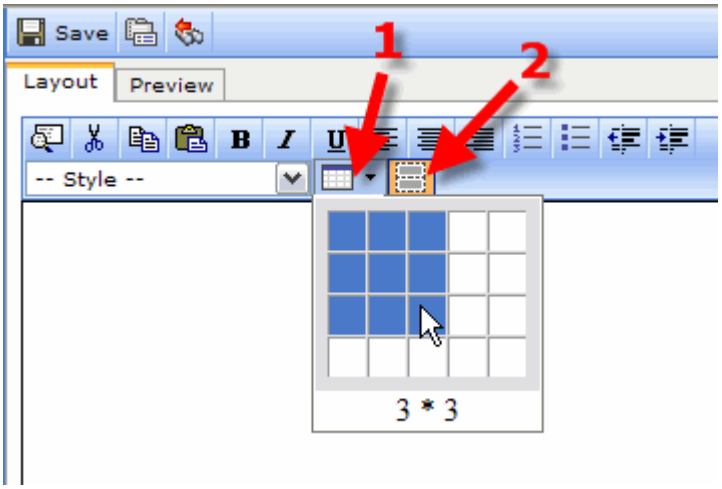


Figure 688 Creating an HTML Table

While working in the Portal Designer, a dotted grid is displayed as a visual guide for you to see the table while editing. The table will not be visible on the portal page. If you wish to see the page without this grid, either select **Preview**, or click the **Hide Grid** button (marked 2 in the figure).

19.12.6.2. Adding Rows and Columns

You can add as many rows and columns as required to any HTML table. To do this:

- Right-click in the cell where you would like to add a row or column, and select the appropriate Insert **Row/Column Above/Below** command from the drop-down menu.

The figure shows how a fourth row is added below the third row.

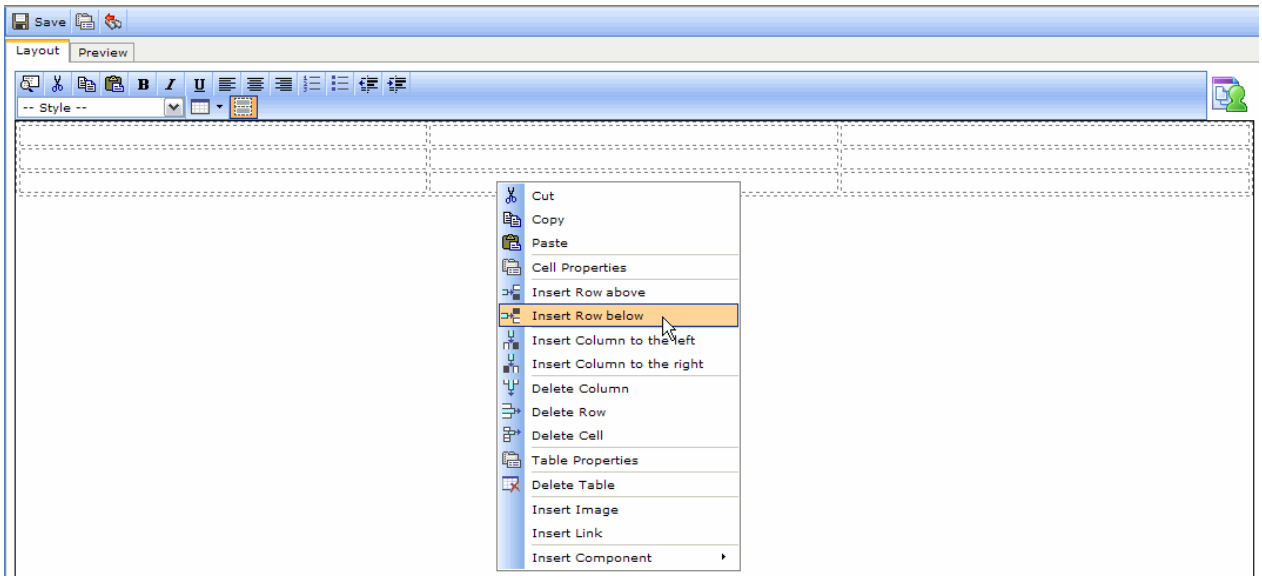


Figure 689 Adding rows and columns to a table

19.12.6.3. Deleting Table Cells, Rows and Columns

To delete a table cell, row or column:

1. Right-click in the row or column you wish to delete.
2. Choose **Delete Cell/Row/Column** from the drop-down menu as appropriate.

In the figure, the fourth row is being deleted.

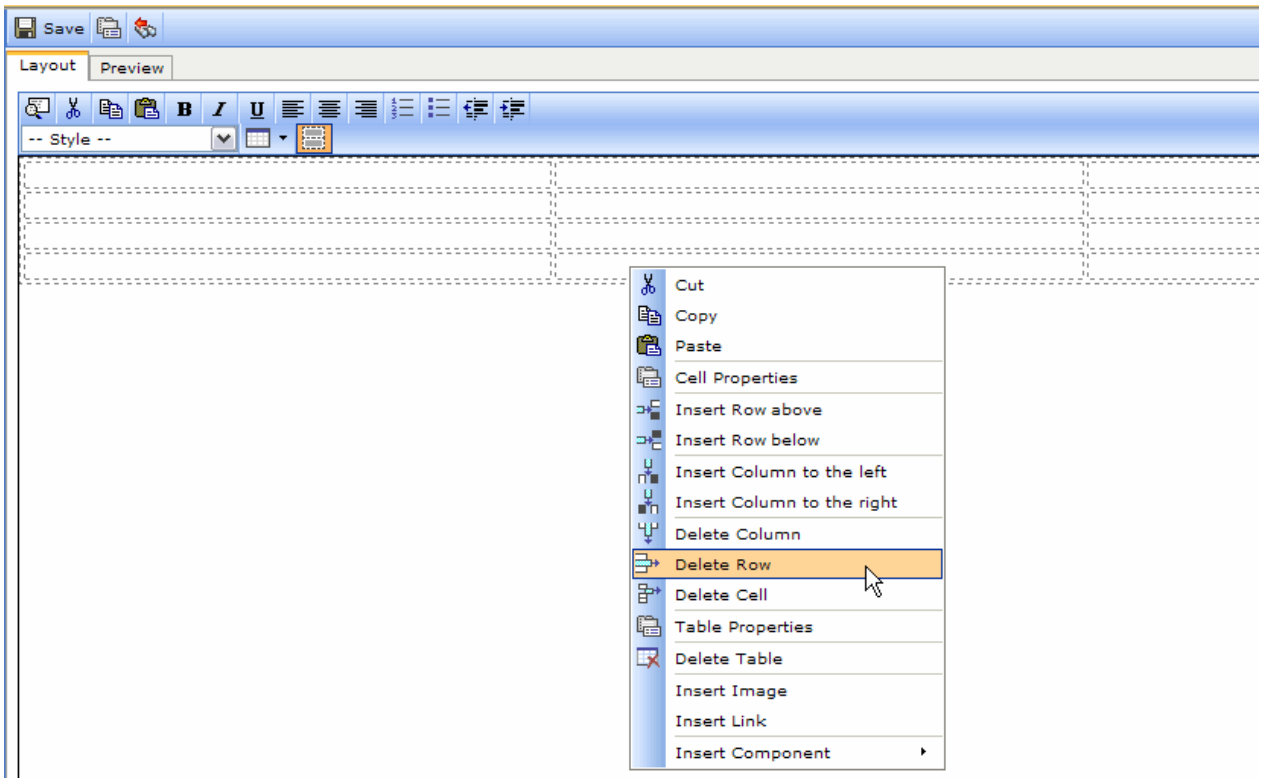


Figure 690 Deleting a cell, row or column

19.12.6.4. Table Properties

1. To open the Properties for a table, right-click anywhere in the table and select **Table Properties**.

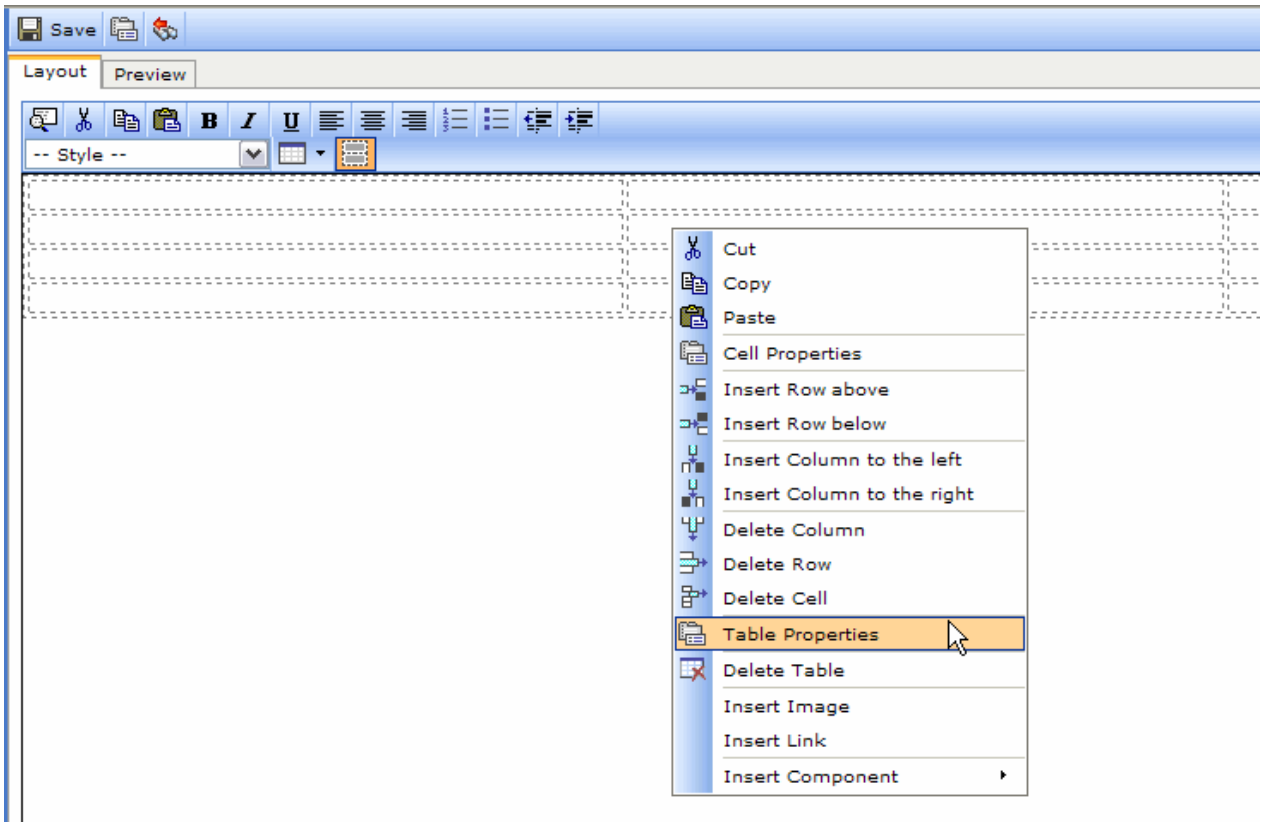


Figure 691 Opening the Table Properties window for a table

A pane that enables you to change the properties for your table appears, as shown below.

2. To set the **background color** of your table, type the desired color code into the BackgroundColor text field, or double-click the little square to the right of "BackgroundColor and choose a color from the color picker.
3. To activate your settings choose **Apply** or **Apply and Close**.

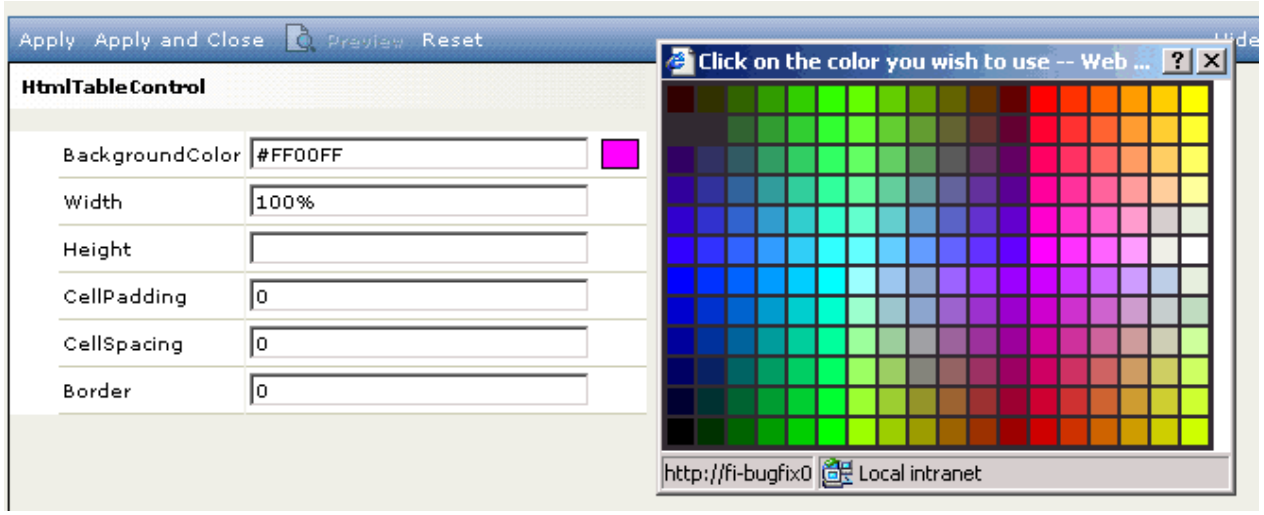


Figure 692 Editing the Background Color

You can also specify **width** and **height** of your table. Be aware that if you specify width and height without the % symbol the system will interpret this to be width and height in pixels.

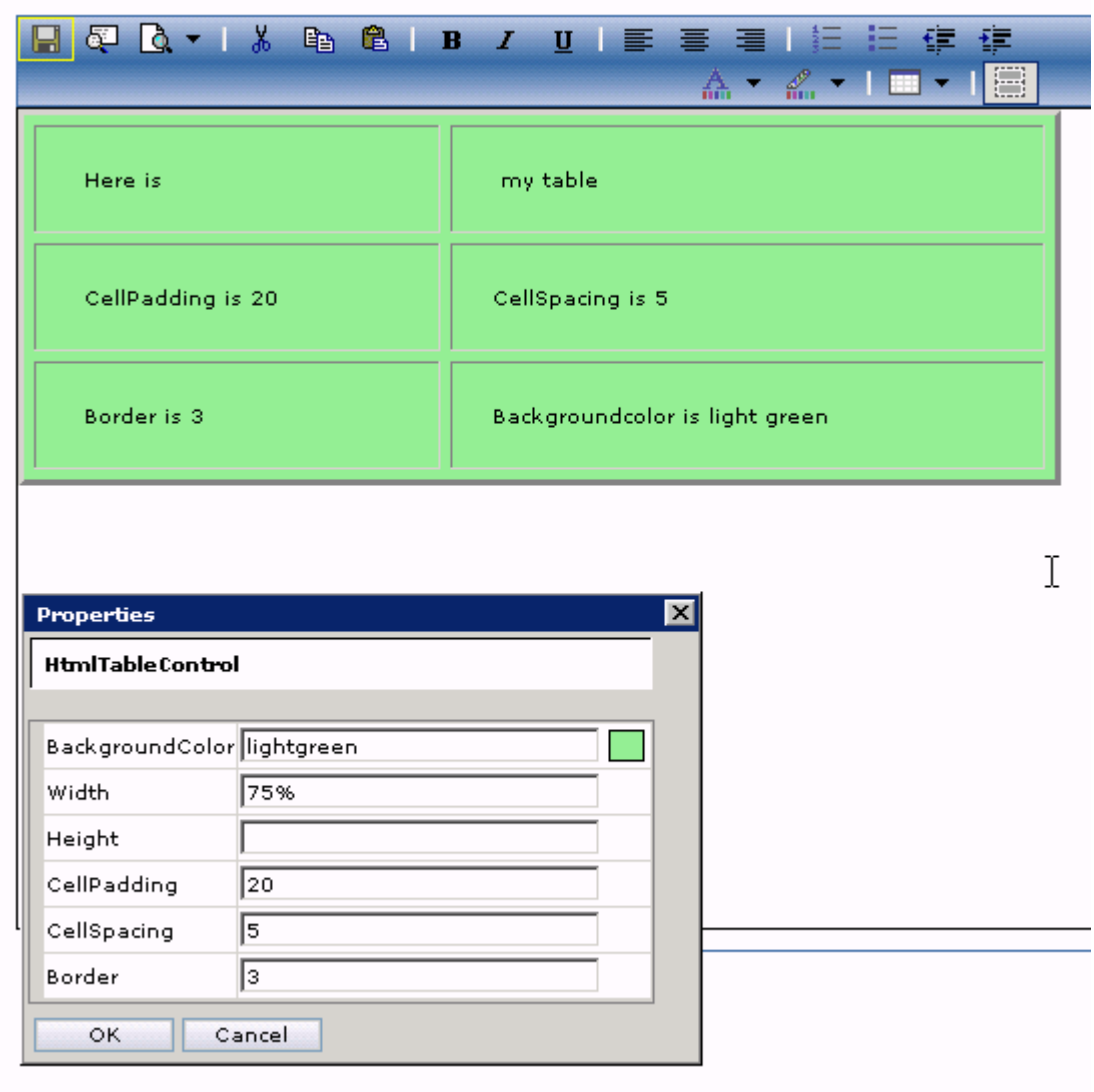


Figure 693 More table settings

In the table properties, the **Cell padding**, **cell spacing** and **borders** are set in pixels. Cell Spacing is how far apart you want the cells to be within the table. Cell Padding is how far from the cell walls you want the text (or other contents) inside the cell to appear.

19.12.6.5. Cell Properties

To alter the cell properties, right-click the cell you want to edit and choose **Cell Properties** as shown below.

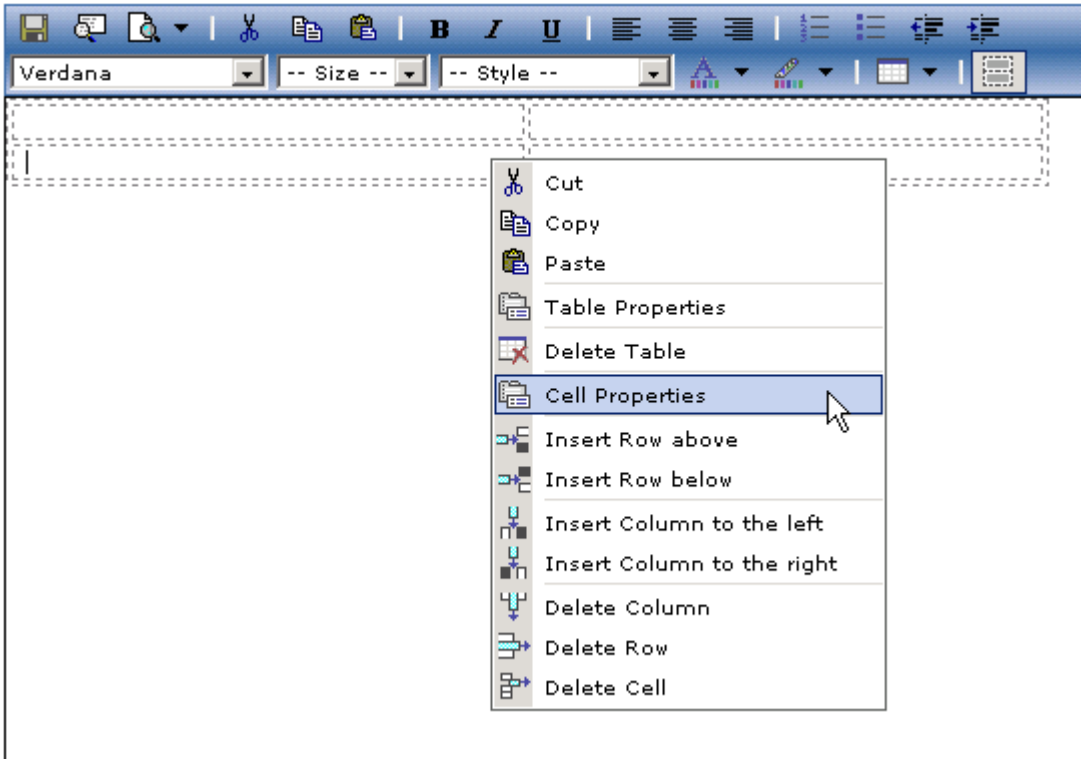


Figure 694 Opening the Cell Properties pane

The property box shown below appears.

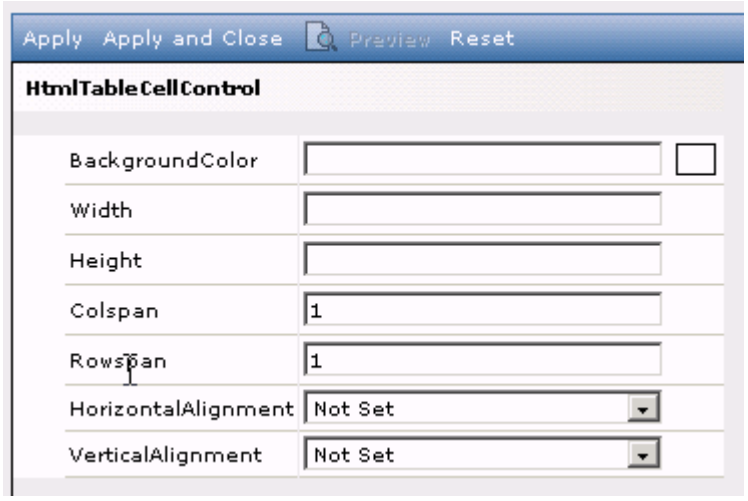


Figure 695 The Cell Properties pane

You can change the **background color, width,** and **height**using the same methods as for the table (see Table Properties on page 640 for more information). Be aware that changing these might influence the formatting or appearance of the other cells in the same row or column.

If you wish to stretch a cell across more than one row or column, use **Colspan** and **Rowspan** to specify how many rows/columns you want the cell to span.

The table in the figure below contains two rows. If you wish to merge the bottom two cells of the table, open the Cell Properties pane for the lower-left cell and set Colspan to 2. As the figure shows, the result is a cell that spans two columns, thus pushing the cell that was the bottom-right cell into a third column:

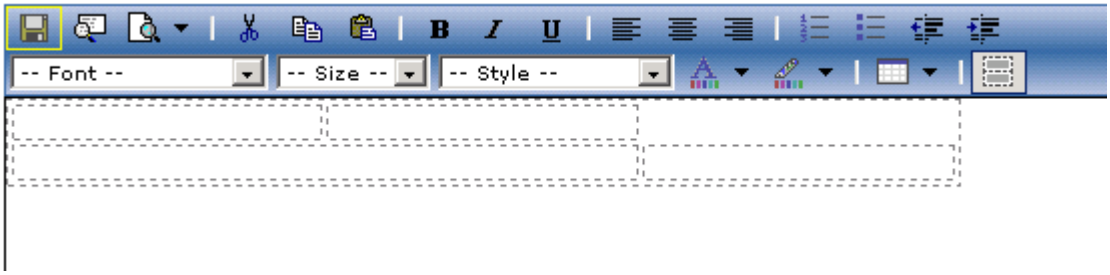


Figure 696 Colspan is set to 2 in the lower-left cell. This pushes the lower-right cell into a third column.

To remove the "third column," which is really not a column but only the one cell pushed to the right, right-click in that cell and choose **Delete Cell** as shown below.

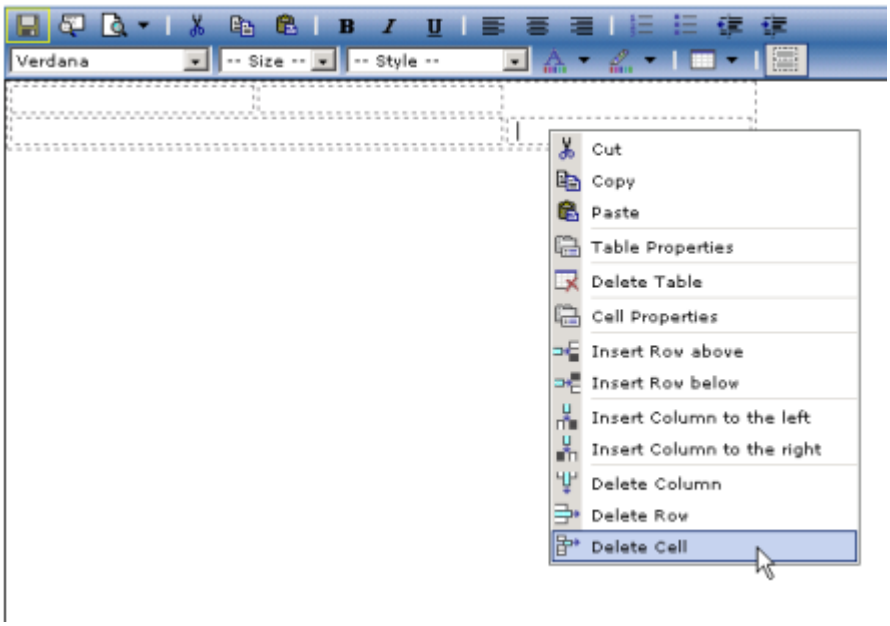


Figure 697 Deleting a cell

The resulting table appears as shown below.

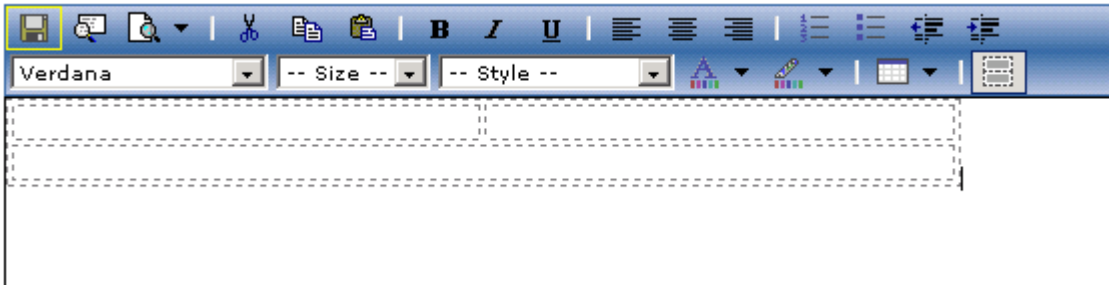


Figure 698 Merged cells

19.12.6.6. HTML Mode

When building your portal pages, you will normally work in WYSIWYG mode (what-you-see-is-what-you-get). Users who are familiar with HTML coding can switch to HTML mode at any time. To change modes, click the **Toggle Mode** button in the toolbar.

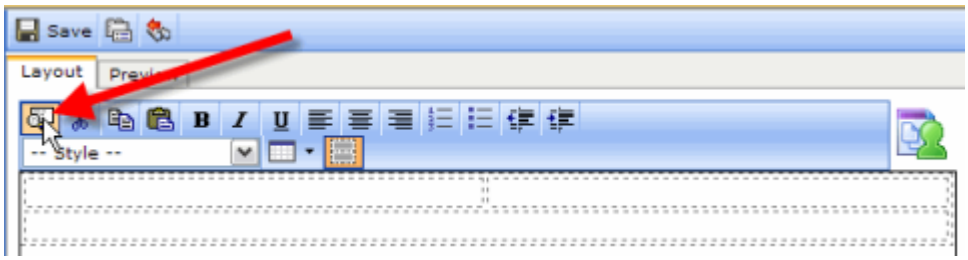


Figure 699 Switching modes

The figure below shows the table in HTML mode. To switch back to WYSIWYG mode, click the same button again.

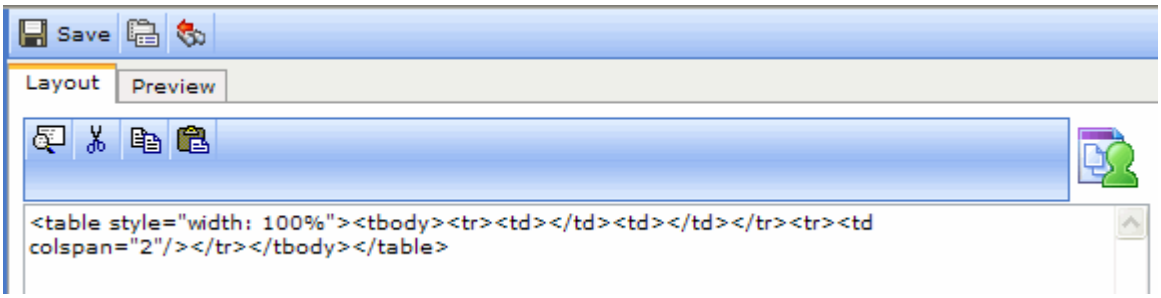


Figure 700 Example of the table definition in HTML mode

Note: When working in HTML mode, do not alter or remove the code that refers to Visual Components (page elements).

19.12.6.7. Free-form Text

You can add text to a portal page by typing it directly into any table cell or you can copy-and-paste text into the table cells. A range of standard text-formatting tools are provided in the text-editing toolbar to allow you to further format your text.

Note that common keyboard shortcuts can be used; for example **CTRL+B** for bold, **CTRL+U** for underline, **CTRL+I** for italic etc. **Enter** inserts a paragraph break ( ) and **Shift+Enter** inserts a line break (
). If you paste in pre-formatted text from for example MS Word or other web pages, it will keep the formatting.

19.12.6.8. Images

You can insert images/pictures directly onto a portal page.

- If you are in HTML mode (see HTML Mode on page 645 for more information) enter the HTML code (img tag) at the location where you want to insert the image.
- If you are in WYSIWYG mode you can copy and paste an image onto the page. You can also drag the image (from a website or browser) and drop it into the required location on a page, as shown in the figure below. Be aware that if the image you wish to use is a hyperlink, you must copy and paste it into the report, not drag-and-drop it, because dragging-and-dropping an image that is a link will result in the browser trying to open the page the link points to instead of pasting in the picture.

Note: The image will not be moved to the Confirmit site; an image tag referring to the original location of the image will be created.

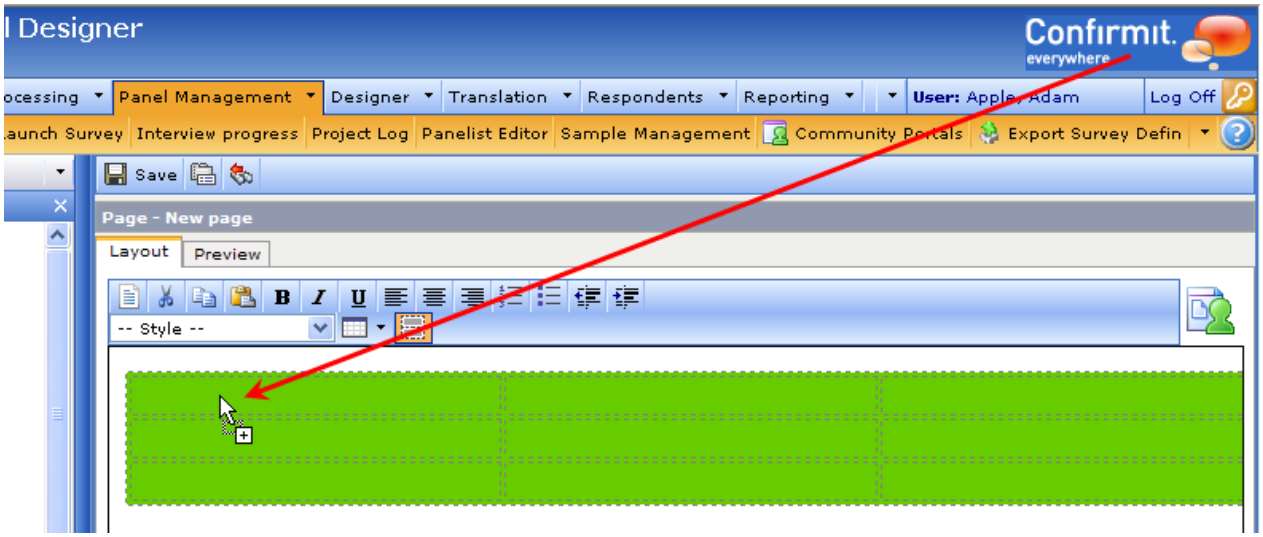


Figure 701 Dragging and dropping an Image onto a page

When the image is dropped, the page will look as shown below.

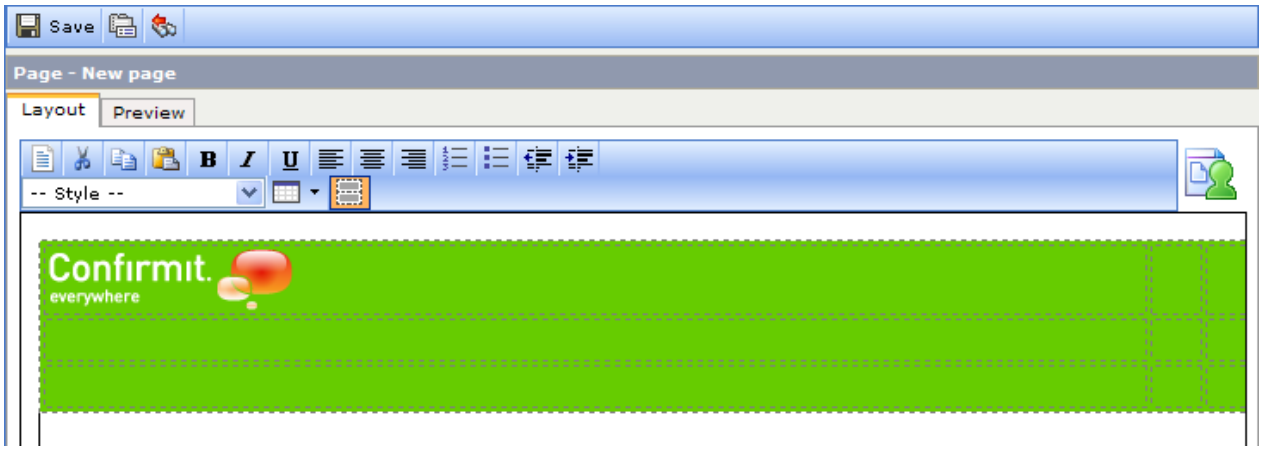


Figure 702 The page with the image inserted

You can also right-click in any table cell and select **Insert Image**. The image control property frame opens on the right side of the screen, in which you specify the source (the URL to the image), width, height, border, alt (alternative text, for use when image is not displayed), image alignment, and horizontal and vertical spacing.

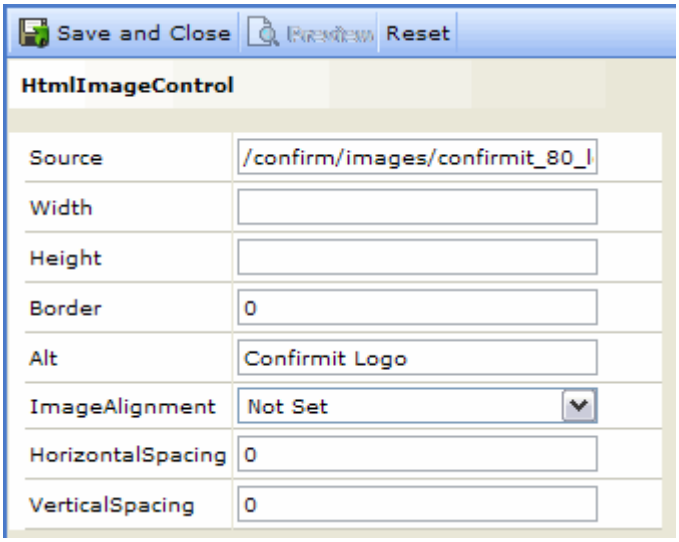


Figure 703 The image properties

20. CATI

Note: CATI is a chargeable add-on. If your company has not licensed the CATI add-on then the functionality, menu items etc. will not be visible in your Confirmit window.

CATI is the abbreviation for Computer Assisted Telephone Interviewing. This is an integrated computer system for data collection that manages all the day-to-day activities of a telephone interviewing call center.

When telephone interviewing is conducted without computer assistance, it requires the use of printed or handwritten lists of telephone numbers, printed copies of the scripts the interviewers are to use while conducting the interviews, and forms on which the interviewers write the replies to the questions that they ask. As the results of the interviews will normally be analyzed by computer, these forms then have to be keyed into computer-readable form by a key-entry process.

CATI removes the need for that time-consuming process, and eliminates the waste of paper.

20.1. The CATI Functionality

Each interviewer has a computer on their desk, with a screen to display the questionnaire text and instructions, a mouse, and a keyboard via which they enter commands or responses. The CATI system then collects data through electronic surveys conducted over the telephone by the interviewers. The survey routing is executed exactly as intended, and the responses will always be within the desired range. The data is stored in a database.

CATI also monitors the administration and telephony functions such as:

- Sample management.
- Quota control.
- Call disposition.
- Interviewer monitoring.
- Productivity reporting.
- Power or predictive dialing (if a dialer is used).
- Sound recording/playback (if a dialer is used).

For further information, refer to the CATI Supervisor's Manual.

20.1.1. The Interviewing Process

The exact procedure to be used by an interviewer while conducting an interview will of course be planned and administrated by the individual call center. However the procedure will probably follow the general format as below:

1. The interviewer logs on to the system.
2. A survey is assigned to the interviewer.
3. There will normally be an introductory screen with the potential respondent's details, including of course the respondent's phone number, and an introduction the interviewer must read out to introduce themselves, the company they are working for and the reason they are calling.
4. The interview will call the number displayed, or a dialer will call the number and pass the line to the interviewer.
5. If the interviewer cannot get through to the potential respondent for any reason (no reply, busy, unobtainable, fax, modem etc), they will code the call outcome accordingly on a sample outcome screen. If they are connected to the respondent they read out the introduction, and if the respondent agrees to take part then the survey can start.
6. The survey script will be coded to follow a particular path (routing) depending on the answers the respondent gives. This means that certain questions or blocks of questions may be answered while others might be skipped. All of this is done automatically, and the interviewers only have to code the respondent's answers to the questions.

7. When the interviewer reaches the end of the survey, the system will flag the current interview and sample record as completed. This means that the sample record (the respondent) will not be used again for this survey.
8. If the survey terminates prematurely for any reason, an exit code will be assigned to the survey depending on the reason for the termination and the sample record will be flagged accordingly. This process can be automated or manual.
9. Surveys can be completed in more than one stage. For example, if the respondent is busy he/she may ask the interviewer to call back at a more appropriate time. The interviewer then terminates the survey and sets up an appointment.
10. As the planned appointment time approaches, CATI will try to send the "started" interview to the same interviewer who originally booked the appointment, if he/she is logged in and available; otherwise it will pass the appointment on to the next available interviewer.
11. When an interviewer has completed a survey and is ready to start a new one, the interviewing system will query the database for the next available sample record to be fed to the interviewing program, and the interviewing working flow will start over again.

Sample records are flagged with different priority status. The system usually queries the database for sample records tagged with an appointment flag first, then no-reply, busy numbers and so on, before releasing a fresh sample. In this way, all sample records with a higher priority status are used before the fresh (still unused) sample. The sample priority can be customized by the CATI system administrator according to global or survey-based requirements.

If there are screening questions linked to quotas (for example age, sex, etc.) and the relative quota cell is already full (see Quotas on page 356 for more information), the system will automatically route the interviewer to a closing statement. The survey will then terminate and the call and sample outcomes (quota fail) will be coded automatically.

Initially each sample record has a status of “New”. The status will be updated every time the sample record is passed on to an interviewer, until a survey is completed for that respondent or the sample record is eventually disposed of. CATI administrators can customize the rules which affect the way sample records are used and disposed of.

Sample can be flagged and moved according to requirements. For example, if a quota cell is closed and there are still records in the sample file for that quota cell, such records can be flagged or moved to an unused queue so that they will no longer be sifted through. If the sample includes tens of thousands of records, this can save a considerable amount of computer resources. Note that this is only done if a quota option is checked for a CATI channel survey (by default it is not) (see The Survey Channels Tab on page 495 for more information).

20.1.2. Time Zones and Shifts

Surveys can be assigned to a time zone depending on where the respondents are located. This means you can avoid calling them at inappropriate times - for example in the middle of the night. The desired time zone is set in the sample and then fixed in to the script, and the system will then allow or stop calls depending on the time zone the respondent is in.

It will normally be sensible (necessary) to specify which hours of each day of the week are to be available for interviewing. The days can be divided into "shifts" which can be classified as for example morning, afternoon, evening, or weekend. This classification may also be useful for recall purposes.

Note: When interviewing is being conducted across time zones, the shift times refer to the current time in the respondent’s time zone.

For further information, refer to the CATI Supervisor's Manual.

20.1.3. Call Disposition

The calls will be disposed of depending on the survey and the outcome of the call. This means that if a respondent's telephone is busy or there is no answer when it is called, the interviewer will code the survey outcome as “busy” or “no reply”. The survey will then terminate and the sample record will be flagged in the database as “busy” or “no reply”. If a dialer is being used, most of the call dispositions are made automatically (connected call, engaged, no reply, unobtainable, fax) and this will dramatically increase the productivity of the call center. As the information is stored in the database, supervisors can extract reports to see for example productivity, interviewers' strike rate, calls per hour, etc.

Respondents are often able to see the phone number or a name for an incoming call, and can decide not to answer a call from an unknown number or that originates from an usual area code. When the respondent sample is selected for a survey, the sample can include caller identification information (CLID) to tell the respondent who you are. This can be set independently for each respondent. A special sample field named 'ExtensionNumber' must added to the respondent database into which the CLID values can be imported, and this information is then sent to the dialer (see Preparing the Respondent List on page 540 for more information).

Note: On a supporting dialer the system field for 'ExtensionNumber' will be sent to the dialer as a call property to specify the desired Caller ID (CLID). This means that individual CLIDs can be set by supplying the desired values in a sample file (using a column headed 'ExtensionNumber'). Contact support to check if your system supports this functionality.

20.1.4. The Dialer

A dialer is a computer server which dials telephone numbers on behalf of the interviewers. This removes any dead time, and therefore dramatically improves the call center's productivity.

A dialer is typically a hardware add-on to the CATI system. It is a computer server full of telephony hardware which links to the telephone network, dials numbers automatically and feeds the connected calls to the CATI system. It allows the CATI system to offer features such as real time monitoring, full call recording and verbatim recording, which significantly increase call center quality and productivity.

A large number of different dialer systems are available on the market - refer to the documentation for your specific system for further details.

20.1.5. Scheduling

The Scheduling functionality allows the CATI interviewer to set up rules to process finished or interrupted calls and reschedule them as necessary. 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** - defines the types of shifts specified for use in the scheduling scripts.
- **Shifts** – defines the hours worked by the interviewers during a week.
- **Rules** – describe sub-rules that trigger recalls.
- **Sub-rules** – describe the actions that should be performed for a specific sub-rule.
- **Actions** - describe the actions that should be performed for a call.
- **Time Zones** – defines a set of time zones that are then 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. The user can also export and import Scheduling script descriptions in XML format.

20.1.6. Monitoring

CATI provides supervisors with full control of the interviewing process, and allows them a direct view of surveys as they are conducted. For example, a supervisor can view reports that show:

- The number of completed interviews
- Mid-interview results for all questions or selected questions
- Mid-interview results for all respondents to date or a sub-set of respondents

While working in a live environment, the supervisor can check interview qualifications. For example, when looking at the sample information, they can allocate French-speaking respondents to the interviewers who speak French, or send certain samples to their "persuader interviewers", interviewers who have low refusal rates.

The supervisor can also review samples to ensure enough numbers are available, and then instantly make changes when needed. For example, if there is a shortage of telephone numbers, the supervisor can adjust the sample management rules. They might decide to re-try the "no answer" numbers or re-try the "busy" numbers five times instead of four before discarding them.

The supervisor can monitor the interviewers while the surveys are being conducted - both video and audio monitoring are available. Note however that audio monitoring can be only achieved if the CATI center is either using a dialer or has an ad-hoc audio monitoring system in place.

After choosing a user or user group, the supervisor can then view the user name, ID and their status in the panel.

The supervisor can choose which interviewer to monitor from a list of the interviewers currently logged on. Once they have selected one user, they can see on their screens exactly what the interviewer is seeing on his/her screen. If audio monitoring is enabled, the supervisor can hear the conversation between an interviewer and a respondent but he/she cannot be heard by the interviewer.

The supervisor can oversee the interviewer's activities such as keystrokes, entered answers and mouse clicks in real time, and can see all the questions and the answers the interviewer is typing, in sequence, in real time.

20.1.7. Productivity Reports

There are two different reports available to the supervisors to monitor the productivity rates. These reports can be printed or exported to suitable formats such as ASCII, CSV, Crystal, Excel, etc. The reports available are:

- **Sample Status Summary report** - a summary of the status of all records within a survey.
- **Productivity report** - a report based on productivity of all interviewers working on particular surveys.

20.2. How to Create a CATI Survey

The questionnaire for a CATI survey is created in the same way as any other survey. When you are ready to launch the survey:

1. Go to the **Survey Management > Survey Settings** menu command.
2. Check the CATI Survey box.

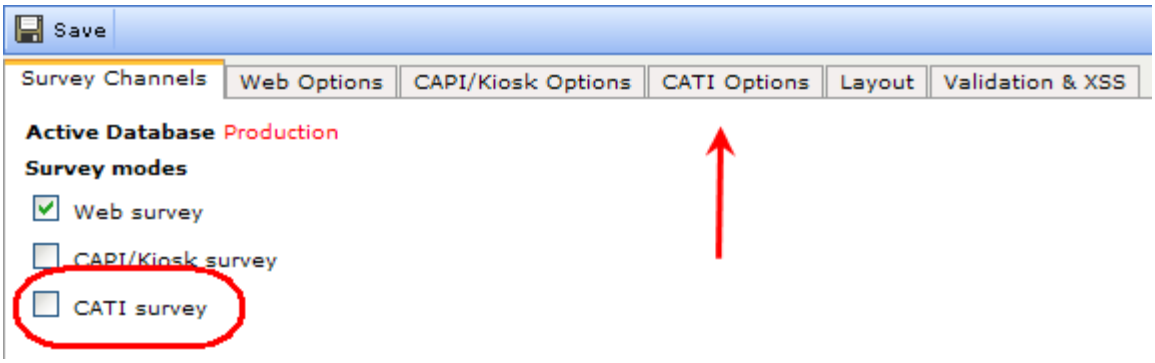


Figure 704 The Survey Settings page

This activates the options in the CATI Options tab. Checking this box also checks the CATI Survey box on the Launch Survey page.

Note: If a survey is CATI enabled, then two additional code attributes become available for Single and Multi questions in the Question Properties > General tab (see The General Tab on page 251 for more information). These code properties are the Default Answer Code and the Refused Answer Code.
If the Default answer code is applied to a question, then during CATI interviewing the CATI interviewer can use the Default button or keyboard shortcut (Ctrl+d) to select the default answer.
If the Refused answer code is applied to a question, then during CATI interviewing the CATI interviewer can use the Refused button or keyboard shortcut (Ctrl+r) to select the Refused category.

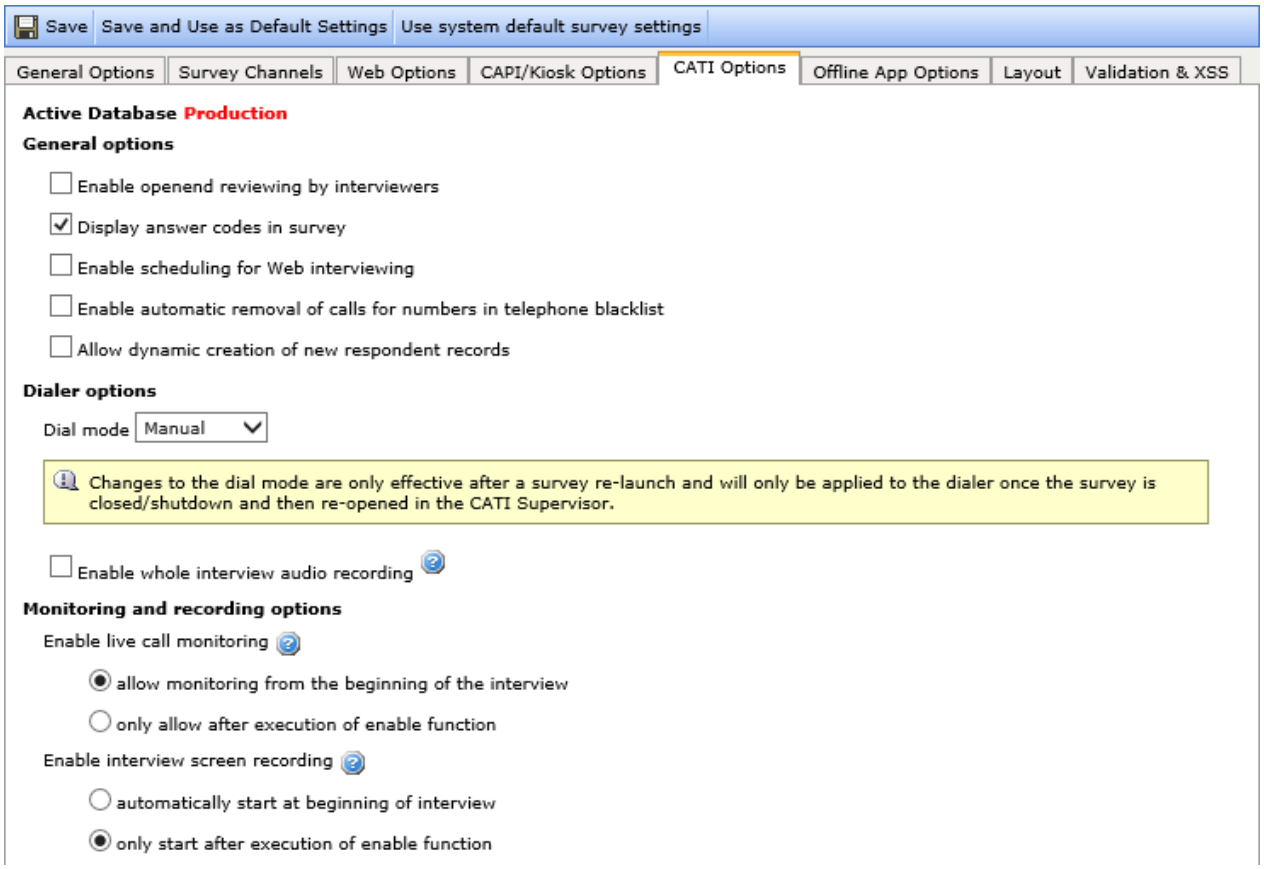


Figure 705 The CATI Options tab

3. Select the desired options (see The CATI Options Tab on page 516 for more information) and save the settings.
4. Launch the survey.

Note: A CATI survey can only be launched in the Production mode; there is no Test mode available for CATI. However you can adjust the UI of a test version so it is easily distinguishable from the production version (see Creating a Test Version of a CATI Survey on page 652 for more information).

On completion of the task, the link to the complied survey will be available on the Overview page in the normal manner.

20.2.1. Creating a Test Version of a CATI Survey

You may wish to create a duplicate version of a CATI survey so you can test it or practice working on it before you start to collect real data in the live production survey. In these cases a common approach is to add words such as 'Test' or 'Live' into the name of the survey. However both the test and the production versions will look almost identical, so a potential danger is that the interviewer may accidentally enter test data into the production survey or production data into the test version. To help avoid possible confusion, you can create a much more visible distinction to the interviewer interface for surveys deployed as test surveys. By simply including **#Test** at the end of the survey name for a CATI survey, the system will automatically adjust the appearance of the interviewer UI by applying a yellow background to the toolbars at the top and bottom of the screen. In addition, the words **TEST MODE** will be included in the console window title, and a flashing **! Test Mode** symbol will be included in the toolbar.

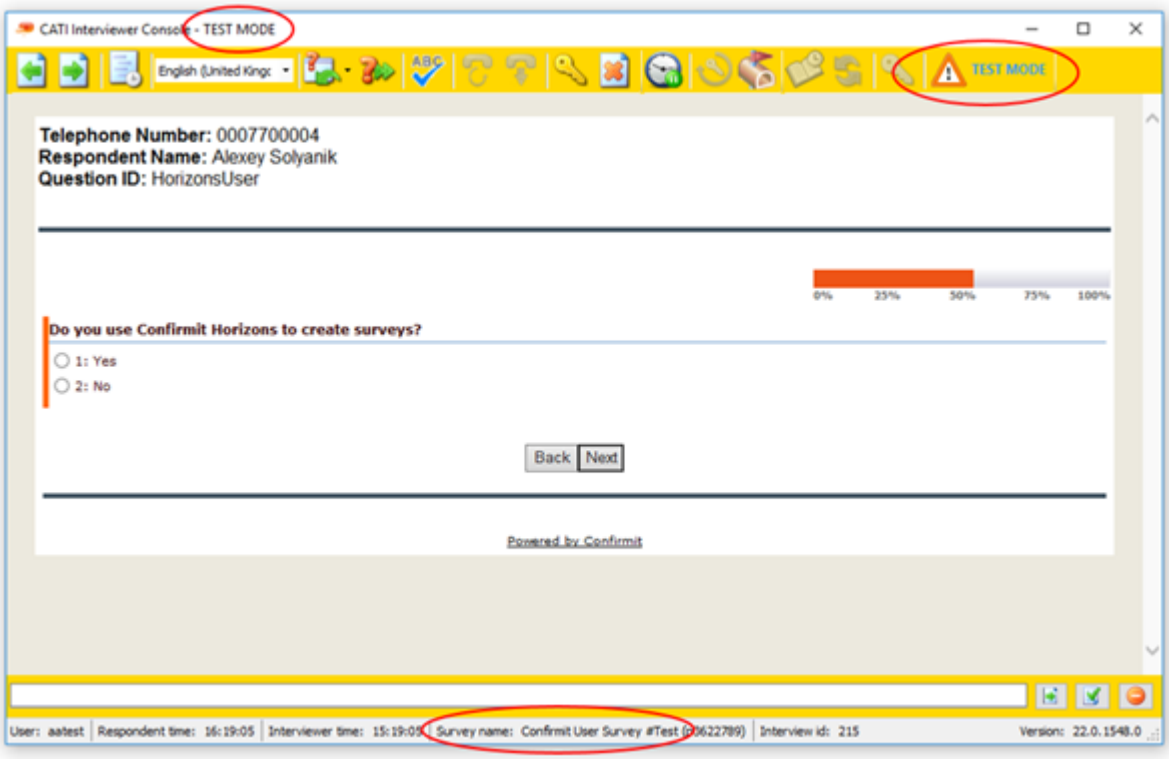


Figure 706 Example of a CATI survey in Test mode

To return the user interface to its normal look, delete the **#Test** text from the survey name and save the changes (see The General Tab Fields on page 175 for more information).

21. AskMe - Introduction

Note: Confirmit AskMe is an add-on module; commercial conditions will apply.
AskMe is Confirmit's branded version of the Offline self-completion app. Both terms are used in this documentation.

One of the challenges many companies are now facing is survey apathy; keeping your respondents interested and making surveys engaging is not easy. Adding multimedia such as audio and video to surveys can make surveys more interesting, but increased file sizes mean downloading these files can take time, especially if the connection isn't good. And this can result in buffering problems and associated frustration. In addition, participants need to be able to take part in surveys when and where it suits them - with mobile devices they could be walking around, sitting on a bus or train, or even on a plane.

AskMe provides a solution to both these challenges. AskMe is an app that allows respondents to complete Confirmit Horizons-created surveys whilst offline. Your respondents are therefore able to complete your surveys in areas with bad or non-existent Internet connectivity, and in addition it guarantees the respondent experience and is ideally suited to surveys displaying or capturing rich media content. AskMe downloads multimedia files during the initial download of the survey to the app, and respondents can then view those files offline. Buffering problems due to slow download or upload speeds are thereby avoided. Data is instantly captured offline, and then synchronized back to the survey when the mobile device is online again. So regardless of whether the respondents have good, patchy or no internet connection, your survey responses won't be lost.

You create your survey using the Confirmit Horizons Authoring environment, where all of the power of the survey engine is available. A single survey link is sent to your participants via email or SMS, and the participant then chooses whether to open the survey online on their mobile or tablet, or whether they wish to download the app using Smart App Banner. If downloading is selected, AskMe then runs the survey offline, including any JavaScript customizations, and allows the participant to easily capture photos and GPS data.

Synchronization back to the server is performed only once the interview achieves a specific status, for example "Complete"; partial responses are not synchronized. If the survey has already been closed when the device synchronizes, you can instruct the survey to add the data to the database anyway or you can instruct it to ignore the data being uploaded. The data is then quietly deleted (see Setting Up the Survey on page 654 for more information). Note that quota checks are not performed in AskMe offline surveys; the qf() function will always return false when executed in AskMe (see Quotas on page 356 for more information).

The AskMe app can be branded as your app, with your logo, look-and-feel, and under your company's name (has commercial implications). It can then be registered in the app stores with your own app name, and survey participants can install the app on as many mobile devices as they wish at no cost. For this reason the AskMe app is also referred to as the Offline self-completion app in this documentation.

For more information on specific platform support available for AskMe, see the System Requirements document on the Confirmit extranet, or on the website at www.confirmit.com. To find the document on the website go to **Products > Confirmit Horizons**, search for System Requirements, then click **Read more**.

Important
Use of Confirmit Apps may include the use of third party components ("TPC"s), including but not limited to the GoogleTM Firebase range of products. The continued operation of certain features of Confirmit Apps may depend on the continued proper operation of those TPCs. CONFIRMIT explicitly disclaims any warranty for or on behalf of TPCs. Certain device information, such as but not limited to operating system and model, may be forwarded to the provider of the TPCs for ensuring proper and efficient wording of the App and in accordance with the TPC's terms and conditions. For a full list of TPCs for your specific App, please contact privacy@confirmit.com.

21.1. Setting Up the Survey

Any of your online Confirmit Horizons surveys can be enabled for offline capture using AskMe. You create and set up the survey questions as for any other survey, then when setting up the survey for launch you make a few additional settings. If the respondent wishes to use AskMe when responding to the survey, the app downloads all survey content such as survey layout, multimedia files, images, video and audio files.

Note that all media files, your company logo etc. that are to be downloaded with the survey must be archived in a survey-specific folder in the File Library (see File Library on page 157 for more information). To do this:

1. In the File Library, create a new folder and re-name it to the survey id (for example p123456789).
2. Name your logo file (the image you want to appear as the logo on the AskMe home screen) **survey_logo.png** and save it in the folder.
3. Copy any other media files, video, images etc. that are needed for the survey into the folder.

   These files will then be downloaded with the survey and will be available as required. The logo image will automatically be placed in the correct position in the AskMe survey.

The additional settings for the survey are:

1. In the **Survey Settings > General Options** tab, check the **Use JavaScript scripting engine** box if it is not already checked. The JavaScript engine is required to run AskMe.

Note: When you are creating a new survey, if the Use JavaScript scripting engine setting is not enabled and the survey is NOT a template, when you select the offline channel the JavaScript engine will be enabled automatically. For existing surveys, you must activate the engine manually - see the Important note below.

Important
Enabling the JavaScript engine for existing surveys may cause scripts to fail. So if you select the Offline channel for an existing survey and the JavaScript engine is not already enabled, a message overlay is presented asking you to confirm that JavaScript is to be enabled. Click OK to confirm. All scripts in the survey should thereafter be checked, and updated as necessary.

1. In the **Survey Channels** tab check the **Offline self-completion app** box and save the changes, or when launching the survey, the Launch Survey page also includes the Offline self-completion survey mode checkbox. Check the box.

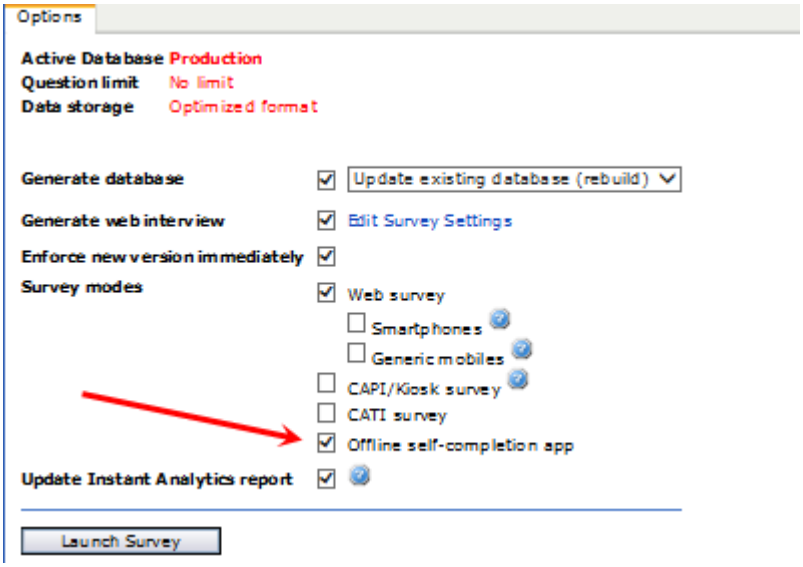


Figure 707 The Launch Survey page

3. Make any other settings as necessary.

   Note that you do not have to check the Smartphones mode option if you are using AskMe. However if you do then the survey will be optimized for smartphones, with touch rendering etc. (see Smartphone Details on page 501 for more information).

4. Launch the survey (see Generating the Response Databases - Launching on page 525 for more information).

On completion of the launch, the standard survey URL is presented on the Launch Survey page and on the **Survey Management > Overview > General** tab. You can now send this URL as an SMS to your respondents, and if they have the AskMe app on their mobile then they can merely tap the URL to run AskMe and download the survey.

21.2. Downloading and Running the App

To run the AskMe app on your Smartphone:

1. Launch the survey, then load it on the device.

   Either tap **Install** (first time), or **Open in app** (subsequent surveys).

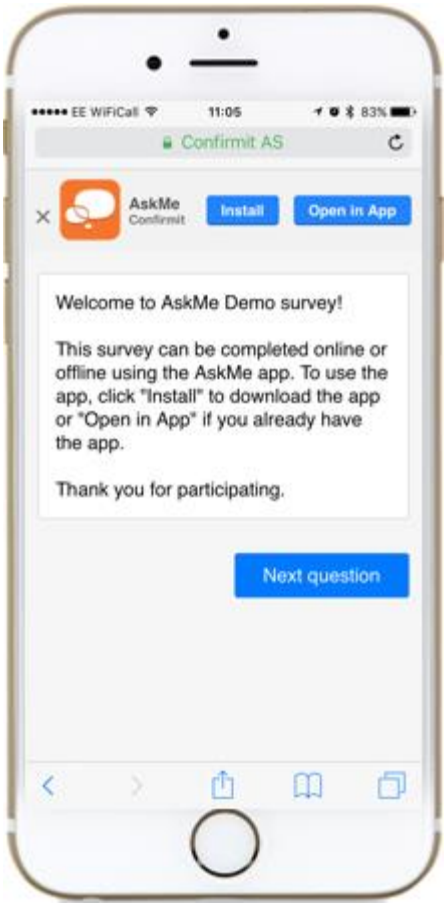


Figure 708 Example of the opening screen

When you open the survey, your screen will look something like the figure below.

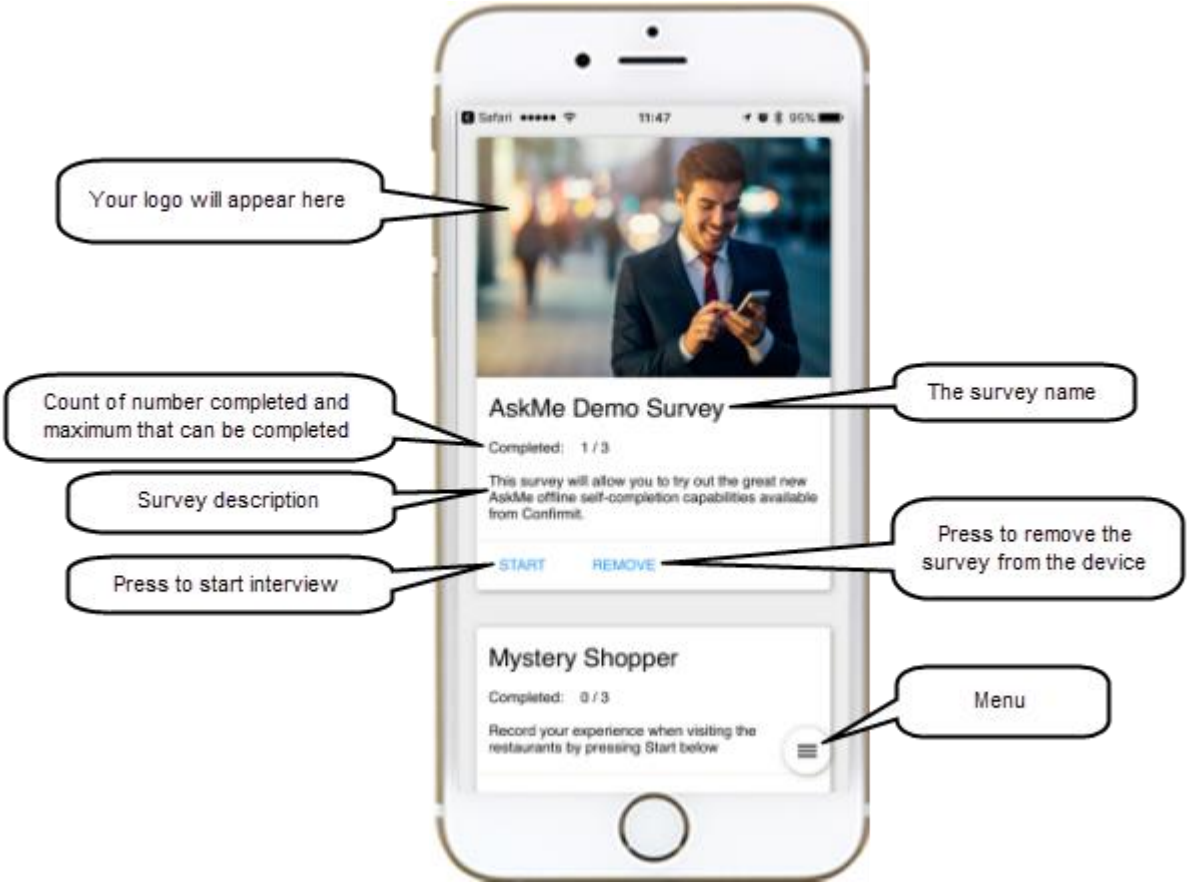


Figure 709 Example of a survey

When the survey is loaded in the app, any uploaded respondent data and any partially collected survey data is also downloaded to the app.

Note that you cannot remove a survey if there is data to be uploaded.

Tab the Menu icon to open the toolbar. The AskMe app has three tool buttons:

- The **cogwheel** - shows a list of the surveys you have available and the AskMe version. Tab the **Home** icon to return to the home page.
- **Refresh** - synchronizes your device and refreshes the list of surveys you have available.
- **Close** - closes the toolbar.

Note: Survey response data stored on the device is not encrypted.

Note: You can read data from and write data to the devices and control the survey description (see the figure above) text in AskMe, using scripting within the survey. Refer to the separate Scripting Manual for further details.

22. The Online Coding Tool

Note: Users must have special access permission to use the Online Coding functionality for a survey - refer to the Object Permissions section for details. The survey administrator (owner) automatically has this permission, but for any users who do not, the Online Coding command will not be available in the menu.

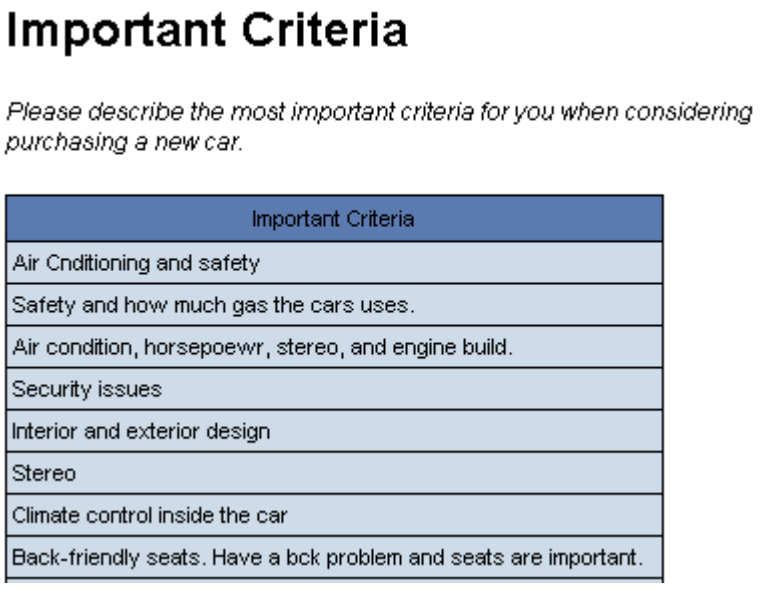
Note: This functionality will be available for surveys using the Optimized or Legacy database format, with the following limitations.
1) Coding and coded questions belonging to different loop levels are not supported.
2) Only filters based on Interview Status and/or survey variables can be used.
3) Variables from loops are not shown in Expression Builder within the Add/Edit Filter dialog.
4) Questions of types Date and Ranking are not supported in Expression Builder.

22.1. Why Have a Coding System?

The coding system is a tool for coding "open-text" questions such that the answers given by the respondents can be given codes and code frames.

This system has been designed to enable coders to classify ”open-text” (open or open-ended) questions into categories, thereby allowing reports to be constructed from these questions in the same way as for single and multi questions. Open-text questions (forms) are here defined as *Open* and *Open Text List* questions, and open-ended questions (any question where the “*other*” functionality is enabled in the answer list of the question). An example of how one can make use of online coding can be seen in the following report images. In this example, the respondents were asked in an open-text question to provide answers describing what criteria are most important when considering buying a new car. Through use of the online coding, coders are able to take the open-text answers and code them into specific categories thus making this information available for reporting purposes.

The report below shows the respondents’ answers from the open-text questions. The table and chart show how the answers can be used in reporting after having been re-coded.



Important Criteria

Please describe the most important criteria for you when considering purchasing a new car.

Important Criteria
Air Cnditioning and safety
Safety and how much gas the cars uses.
Air condition, horsepoewr, stereo, and engine build.
Security issues
Interior and exterior design
Stereo
Climate control inside the car
Back-friendly seats. Have a bck problem and seats are important.

Figure 710 Example of respondent answers for the open-text question before coding

Important Critera

Which are the most important criteria for you when considering purchasing a new car?

	Important Critera					
	Pos		Neg		*Total*	
Comfort	4	20.0%	16	80.0%	20	100.0%
Engine	3	15.0%	17	85.0%	20	100.0%
Stereo	2	10.0%	18	90.0%	20	100.0%
AC	2	10.0%	18	90.0%	20	100.0%
4WD	1	5.0%	19	95.0%	20	100.0%
Safety	9	45.0%	11	55.0%	20	100.0%
Other	8	40.0%	12	60.0%	20	100.0%

Figure 711 A Sample example

The sample table was produced in reporting, using the re-coded open-text answers as displayed in the previous list. Note that any answers not belonging to a specific category were coded as "other", and the answers which fit into one of the available categories such as Safety, Comfort, Engine… were given codes accordingly.

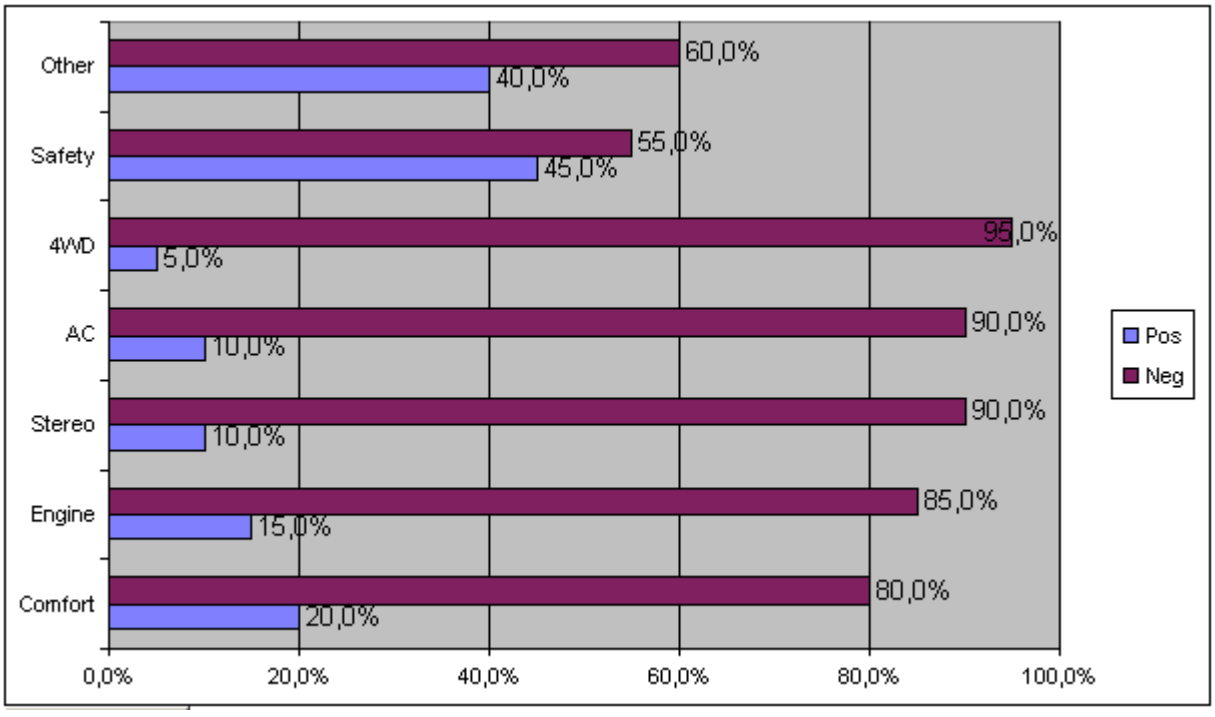


Figure 712 This Chart was produced using open-text answers after the online coding was complete

22.2. Specification Summary

The main features of the coding system are:

- For each open-text question (answer), a single or multi question is required in order to define the available codes for the question (answer). Specifying the corresponding open/open-ended question (answer) in the properties for the single/multi question links these two questions (see One Single or Multi for Each Open Text on page 660 for more information).
- A permission control panel is used to show the status of the questions, and to lock and unlock questions. The basic idea is to have multiple accesses to one survey and single access to one question within this survey (see Locking the Questions for Coding on page 662 for more information).
- The main windows of the coding system are:
    - The Administrate Online Coding Window is available to users with the Administrate Online Coding permission for the survey. From the Assign Coders tab, the coding administrator is able to allocate questions to coders, and export response data for open-text questions. From the Filters tab the coding administrator can create, modify, activate and delete filters.
    - The Online Coding tab is available to users with the Code Opentext permission for the survey. The coder can chose an open-text question and code its answers (see The Coding Window on page 668 for more information).

22.3. One Single or Multi for Each Open Text

For each open or open-ended (one for which the "other" option is checked) answer which is to be recoded, a new single or multi question must be added to the survey.

1. Add the single/multi question in the normal way by dragging a new single or multi question into the Questionnaire Tree.

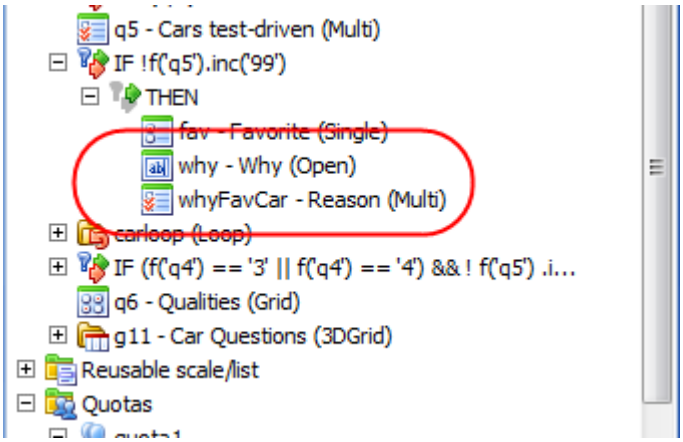


Figure 713 A Multi question for online coding

This question functions in the same way as all other single/multi questions; answer alternatives and corresponding codes must be defined in the Answers window for the question. The figure below shows an example of a list. Any number of codes can be defined.

2. Add the required answer alternatives and codes to the list.
3. Click the **Properties** button to open the Properties list for the question.

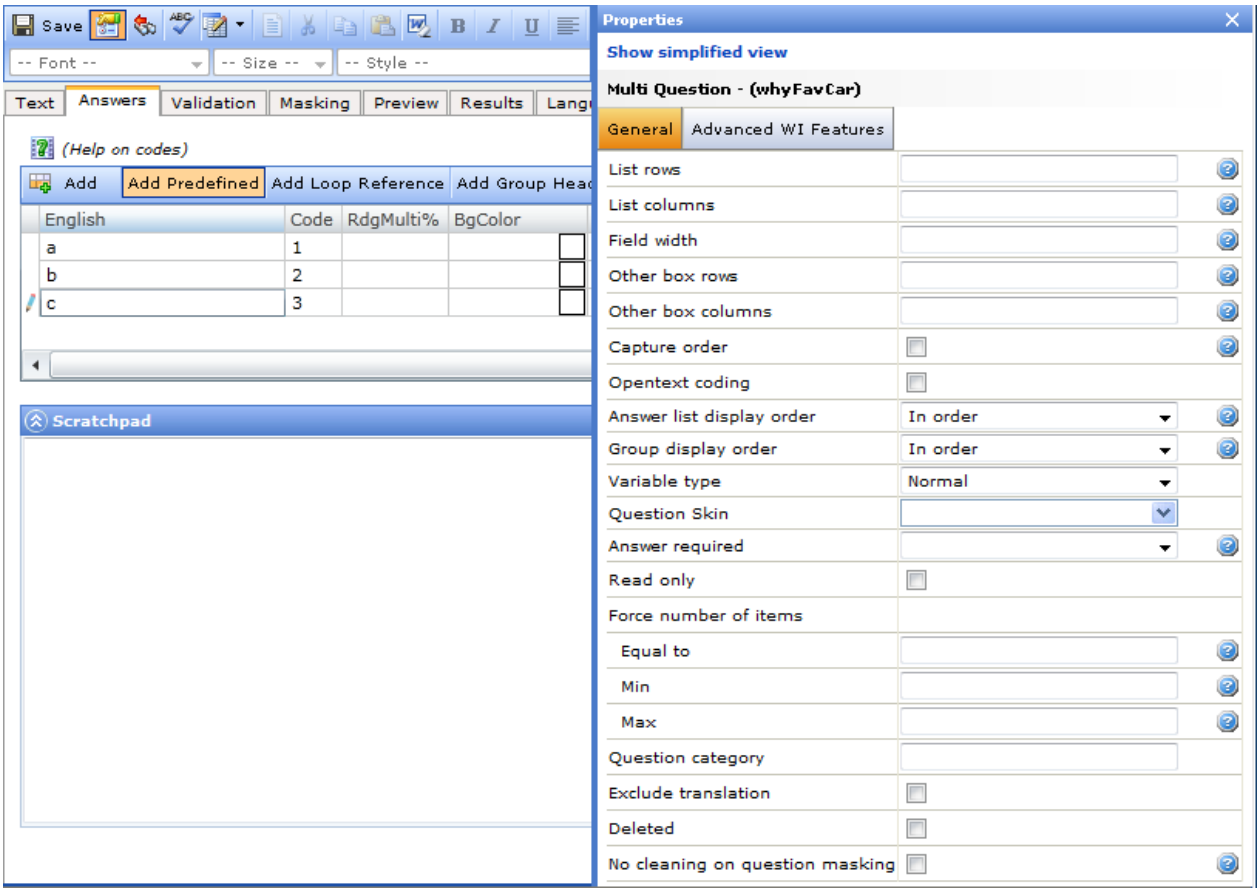


Figure 714 Defining the multi question for online coding

Here you define which question or answer is to be linked. The Properties list includes a checkbox; **Opentext coding**.

4. Click in the **Opentext coding** checkbox to select it.

   The **Coding of** field appears. This field is where you specify which open or open-end question (answer) is to be coded by this single/multi question.

5. Type into the **Coding of** field the qID of the open/open-ended question (answer) (in the example above this is **why**).

6. Click the down-arrow beside the **Variable Type** field to open a drop-down list, then select **Hidden** from the list.

   This is to hide the single/multi question from the respondent.

7. Save the changes.

8. Go to the **Designer > Launch Survey** menu command and launch the survey.

   This will now create a link to the chosen open-text question.

Question (form) type	**qID to be typed in the "coding of" field**	**Remarks**
Open Text	qID	

Open Text List	qID _code	E.g: q5_3 will let you recode the answer alternative with code 3 from the Open Text List question q5.
Single, Multi, Grid, 3D Grid or Open Text List with an “other” option specified in the answer list.	qID _code_ other	For example: q6_98_other Here 98 is the set code of the “other” option in the answer list. With “other” you always have to include _**other** after typing the qID and the code.

Figure 715 How to fill in the "coding of" field of single/multi questions defined for online coding

22.4. Object Permissions

The survey administrator must define who will have permission to administrate the coding process and who will have permission to code the open-text questions. This is set up for the survey in the survey's Permissions window.

1. Open the required survey.
2. Go to the **Survey Management > Permissions** menu command.

   The Project Permissions page opens. Note that Online Coding has two possible permissions: **Administrate...**, which allows you to assign coders and activate filters, and **Code opentext** which allows you to perform the actual coding work on the survey.

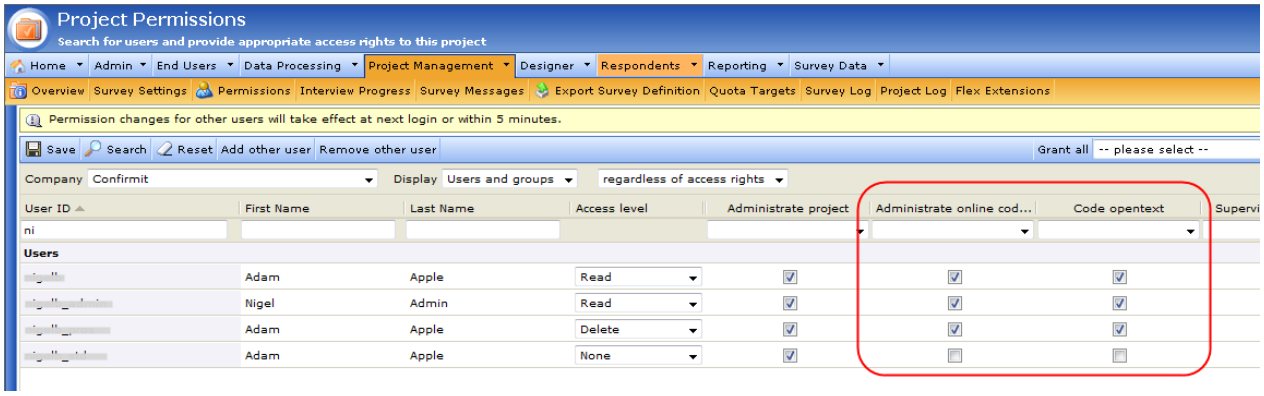


Figure 716 Example of the Permissions page

3. In the list, find the user you wish to allocate permission to and click the box in the **Administrate Online Coding** and/or the **Code Opentext** columns as appropriate to place checkmarks there.
4. Click **Save** to save the changes.

The user will now have the appropriate commands available in the **Survey Data > Coding** menu, and will be able to assign coders to questions and activate filters in Online Coding and/or perform the coding as specified.

22.5. Locking the Questions for Coding

If two or more coders attempt to work on the same question at the same time, the database will be corrupted. Therefore Confirmit allows only one coder to be allocated to a question at one time.

A window in which questions can be allocated to coders is therefore the first window that appears when you start the coding system. The window also displays the bindings between the open-text questions and the corresponding single/multi questions. To open the window:

1. Go to the **Survey Data > Coding > Administrate Online Coding** menu command (this is available to users with the Administrate Online Coding permission for the survey).

   The Administrate Online Coding window opens.

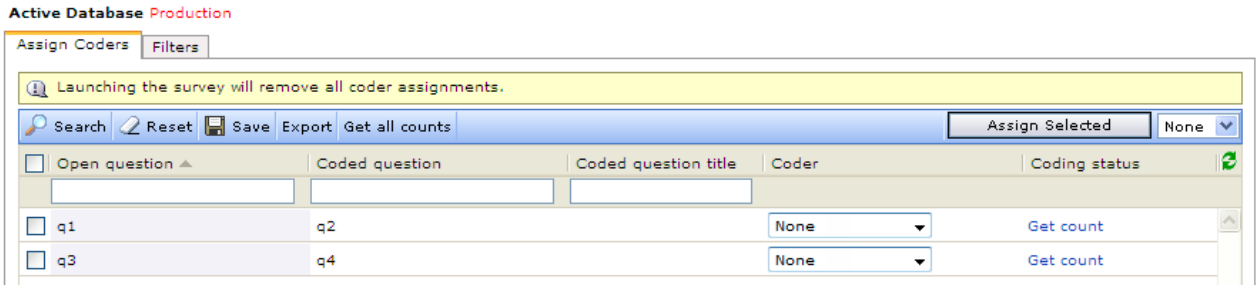


Figure 717 The Assign Coders tab of the Administrate Online Coding window

   This page lists all the questions that are available for coding (in the figure above, two questions are available). To allocate a coder to a question:

2. In the Coder column, click the down-arrow beside the field for the appropriate question (see the figure below).

   A drop-down list of the coders who have been given permission to work on this survey, appears (see Object Permissions on page 662 for more information).

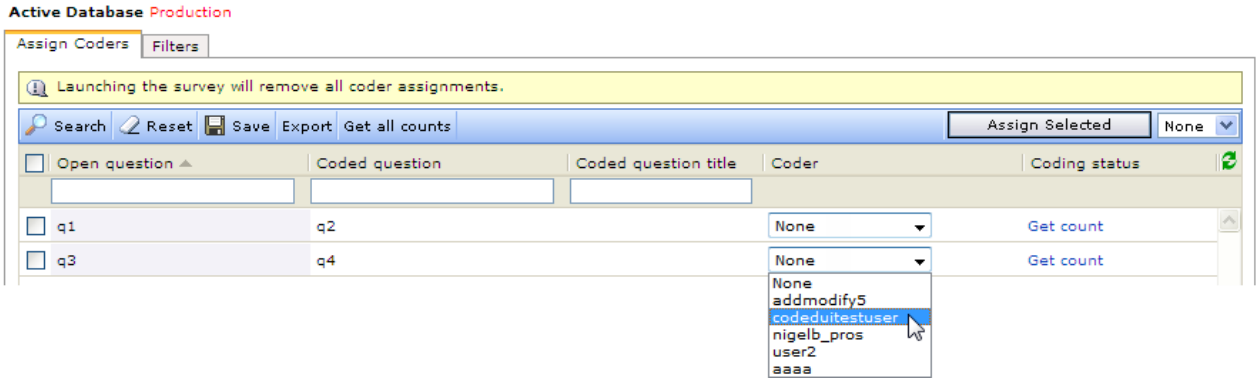


Figure 718 Selecting a coder to work on a question

3. Select the coder you wish to allocate to the question and click **Save**.

   To allocate a coder to several questions at once, check the boxes to the left of the questions you wish to assign to the coder then select a coder from the drop-down list beside the **Assign Selected** button. Thereafter click the **Assign Selected** button (the assignments will be saved automatically).

When a coder is allocated to a question, a hyperlink is created to the coding window for that specific question and that specific coder (on the **Survey Data > Coding > Online Coding** tab the Open Question and Coded Question texts turn blue). Only the coder who is allocated to the question will see this hyperlink, so only that coder can access the question. Note that many coders can have access to one survey, but only one coder can work on a specific question at one time.

Note: To speed up the presentation of the list, counts are not initially displayed. To view the count for a particular question, click Get count for that question. To view all the counts for the list, click the Get all counts button in the list toolbar. Note that generating the counts may take some time; a progress spinner is displayed during the retrieval process.

22.6. Filters

Users with the Administrate Online Coding permission for a survey can create filters such that for example only the answers given by a particular group of respondents will be visible to the coder. To create a filter:

1. In the Administrate Online Coding page, go to the Filters tab.

   Any filters that have been defined for this survey are listed.

2. Click the **New Filter** button located towards the right side of the Filters tab toolbar.

   The New Filter overlay appears.

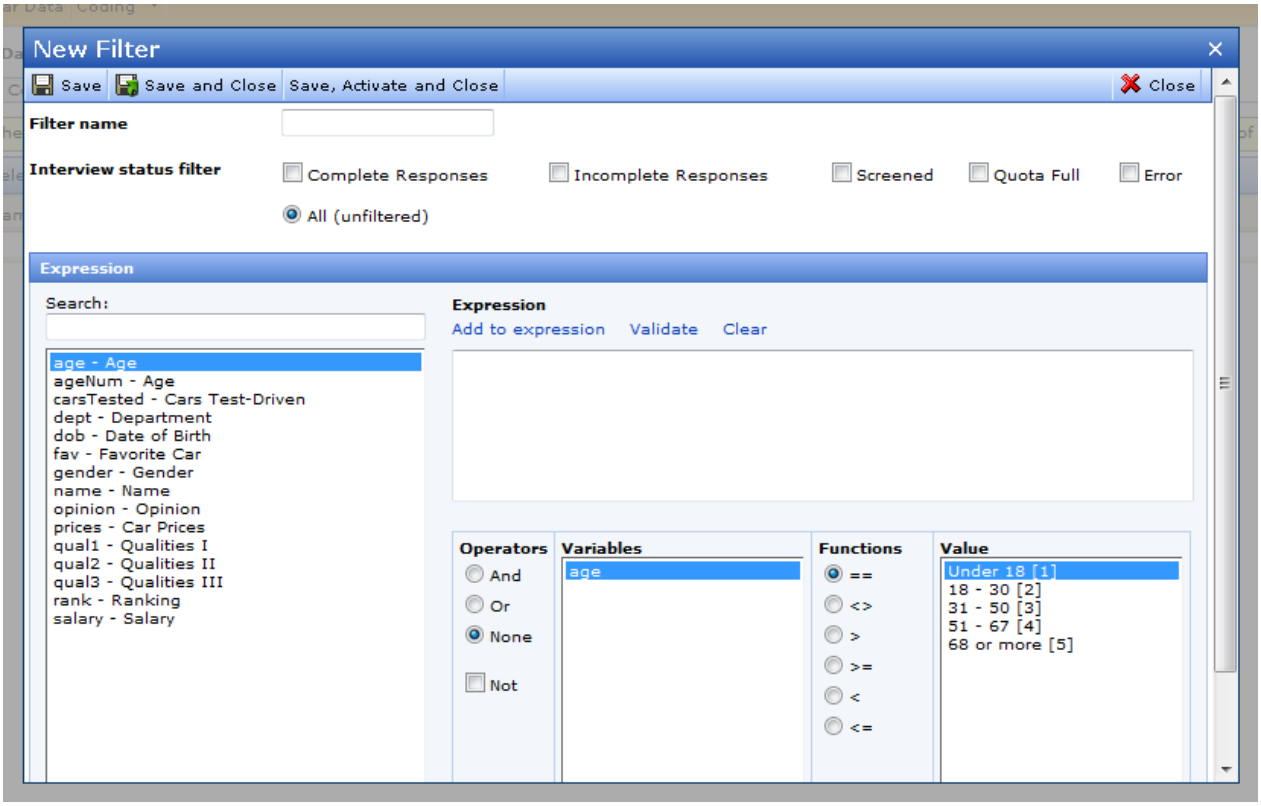


Figure 719 The New Filters overlay

3. Type a name for your filter into the Filter Name field.
4. Check any Interview Status boxes as appropriate.
5. To use the expression builder:
   - In the left column click on the question you wish to use (in the event the question list is extensive, scroll or use the Search functionality as necessary).
   - Select the required Operator (the expression must begin with "None").
   - Select the desired Variable, Function and Value.
   - Click **Add to expression**. The selected items are added to the Expression field.

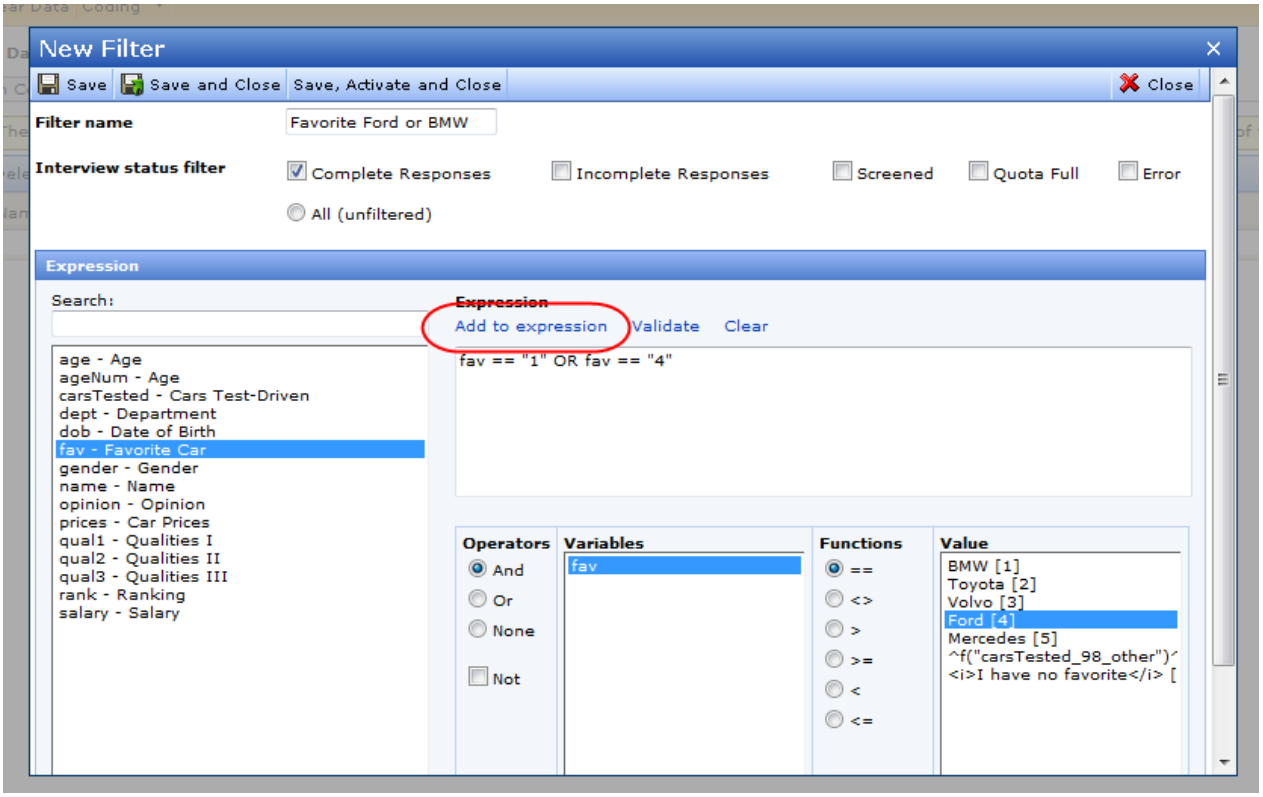


Figure 720 Creating the filter expression

6. Click **Validate** to check that your expression is correct.
7. Save your changes.

   Once the filter has been saved, it will appear in the list on the Filters tab.

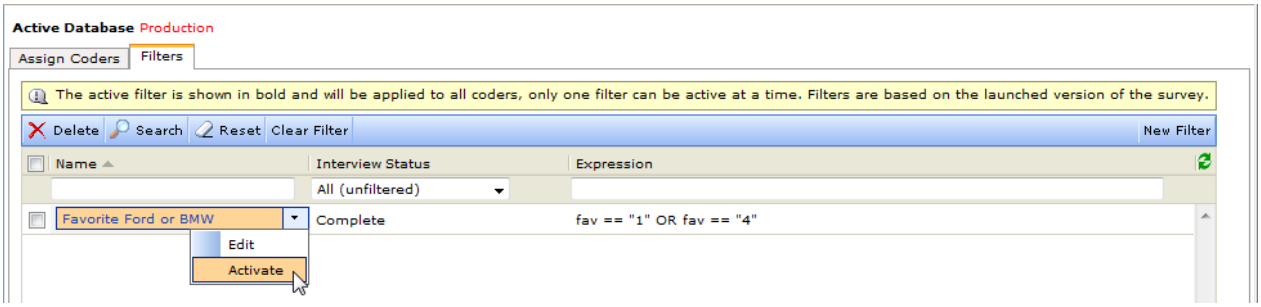


Figure 721 The new filter in the Filters tab list

To activate the filter, move the mouse cursor over the blue filter Name link, click the down-arrow button which appears beside the link, then select **Activate**. When a filter is active, the filter Name link will be presented in bold text.

When activated, the filter in the example will show only those respondents who have completed the survey and who have stated that their favorite car is either a Ford or a BMW.

To deactivate the filter, click **Clear Filter**.

To edit the filter, click on the blue filter Name link to open the filter editing overlay, or move the mouse cursor over the link, click the down-arrow which appears beside the link, then select **Edit**.

22.7. Exporting Open-Text Question Response Data

An online coding administrator can export the response data from open-text questions. Response data from a selected open-text question is exported into a tab-separated text file, which is then zipped. The file will contain the SurveyID, RespID, QuestionID and open-text information that satisfies the selected export filter. To do this:

1. Go to the **Survey Data > Coding > Administrate Online Coding** menu command and open the Assign Coders tab.
2. Click on the checkbox for the open-text question you wish to export.

   Only one question can be exported at a time.
3. Click **Export**.

   The Export question response overlay opens.

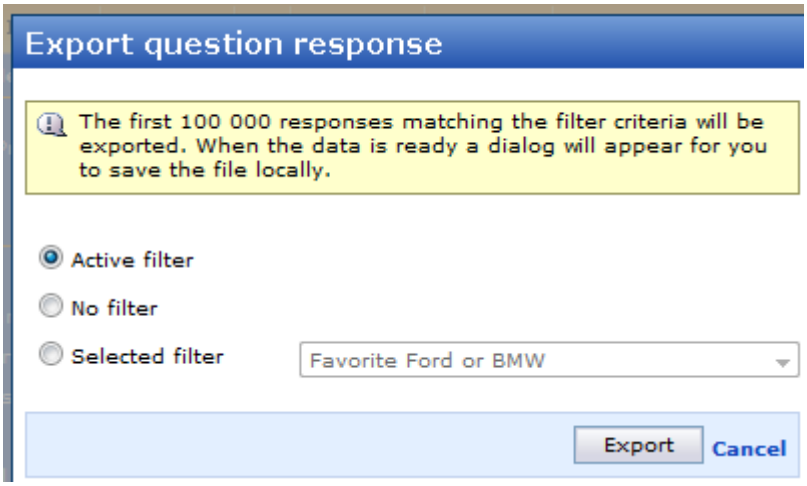


Figure 722 The Export question response overlay

   Here you can select a filter to use for the export (the active filter, no filter or select a filter from the list of those created for the survey filters).
4. Click **Export**.
5. A standard “File Download” dialog is displayed and the zipped file is available for downloading.

22.8. Entering Online Coding

Note: Users must have special access permission to use the Online Coding functionality for a survey - refer to the Object Permissions section for details. The survey administrator (owner) automatically has this permission, but for any users who do not, the Online Coding command will not be available in the menu.

To enter the Online Coding module:

1. Select a survey.
2. Go to the **Survey Data > Coding > Administrate Online Coding** menu command to perform coding of open-text questions.

   The Online Coding Tool window opens.

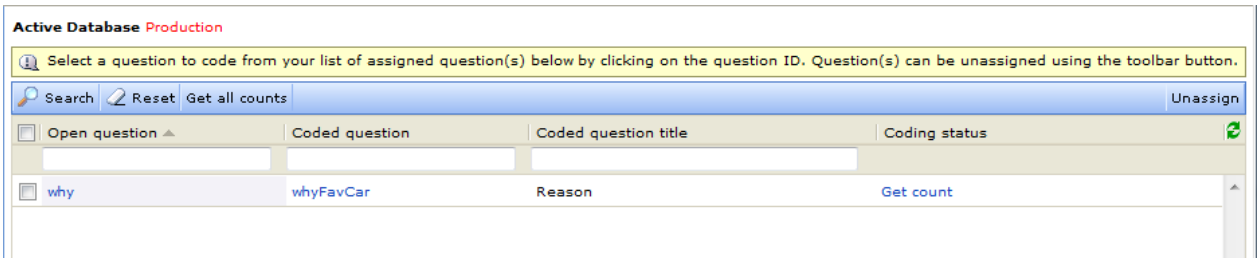


Figure 723 The Online Coding Tool window

A coder is able to de-assign questions that he/she does not wish to work with. To do this:

1. On the **Survey Data > Coding > Administrate Online Coding** page, click in the appropriate checkbox(es) to select the question(s) that you do not wish to work with.
2. Click the **Unassign** button (right upper corner).

   The selected questions are removed from the list. If a coding administrator opens the Assign Coders tab for this survey, he/she will then see that these questions now have **None** in Coder field.

22.8.1. Coding Screen Size

The User Settings page (see User Settings on page 134 for more information) contains a setting that is of interest to the Coding Administrator. This is the Coding Screen Size setting, located towards the bottom of the page. To access this setting:

1. Go to the **Home > User > Settings** menu command or click on the **User:** link towards the upper-right corner of the Confirmit window.

   The User Settings window opens.

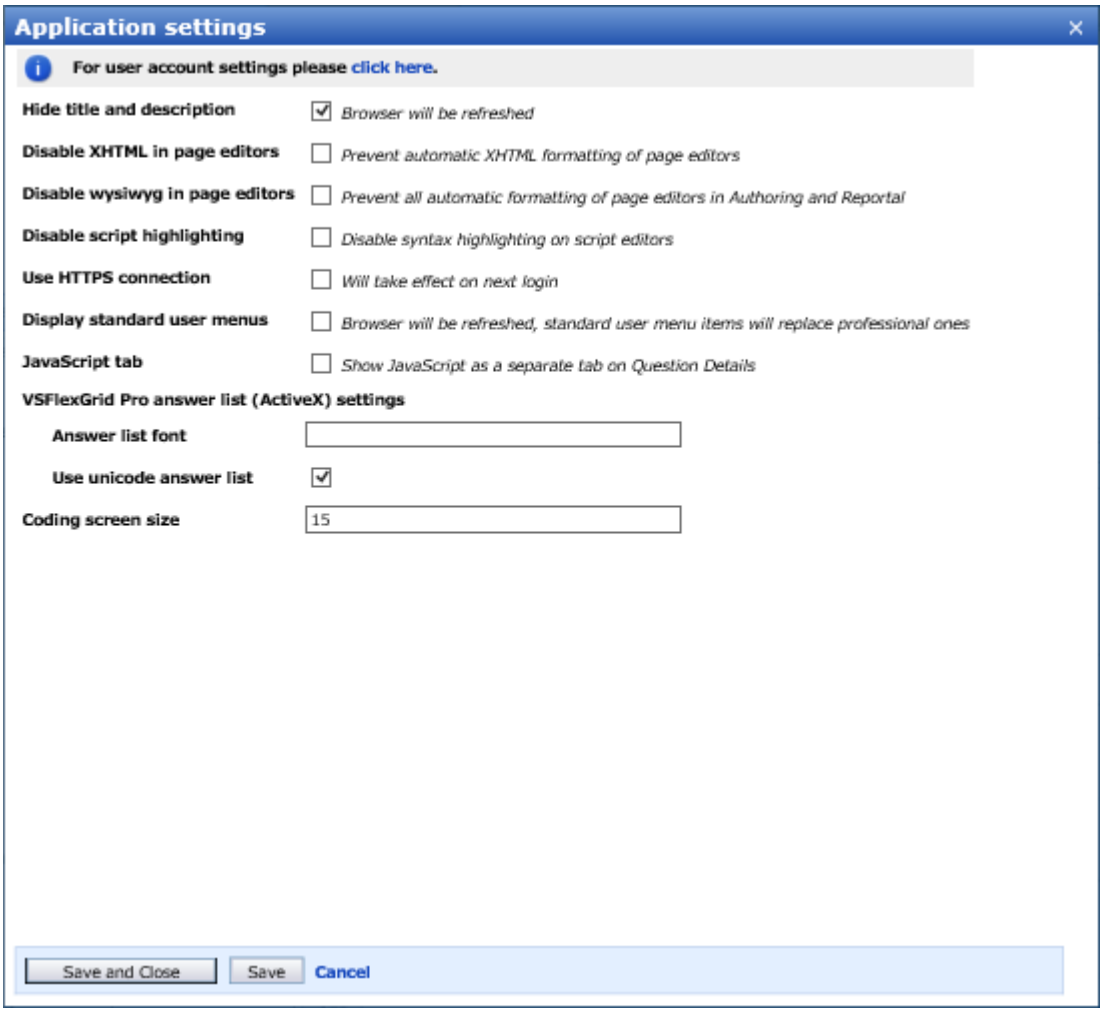


Figure 724 The User Settings window

- **Coding screen size -** This is the maximum number of answers that can be displayed on one screen while coding. The size will be set to 15 as default the first time the coding tool is used, but can be changed at any time. To do this, enter the desired number and click **Save**.

22.9. The Coding Window

After a question has been allocated to a coder (see Locking the Questions for Coding on page 662 for more information), the specified coder can access the question.

1. Go to the **Survey Data > Coding > Online Coding** menu command.
2. Follow the hyperlink by clicking on the question which is to be coded.

   A screen similar to the one shown below will appear. Note that a coder will only see hyperlinks for questions to which he/she is allocated.

The coding window is where the coders can perform the actual coding work on the survey. The coder can search for records using either a text search of respondent's answers and/or a code number search. The coder can choose which field to sort by, whether they want to sort ascending or descending, and if they want to see coded and/or un-coded questions.

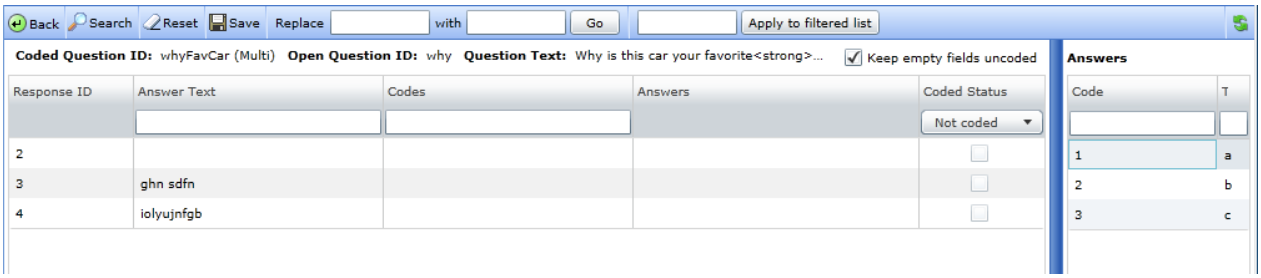


Figure 725 Example of the coding window

Press the **<Enter>** key on your keyboard or use the arrow keys to move the cursor to and activate the next field in the Online Coding Window.

22.9.1. Elements Within the Coding Window

22.9.1.1. The Header Row

The Coding window's header row shows the question that the coder is currently working on, and includes:

- The Coded question ID.
- The Open question ID.
- The Question text.
- The Keep empty fields uncoded checkbox (relevant when coding into a multi question).
- The Suppress Empty Fields checkbox.

22.9.1.2. Searching and Sorting

The central section of the coding window is for "searching and sorting" answers.

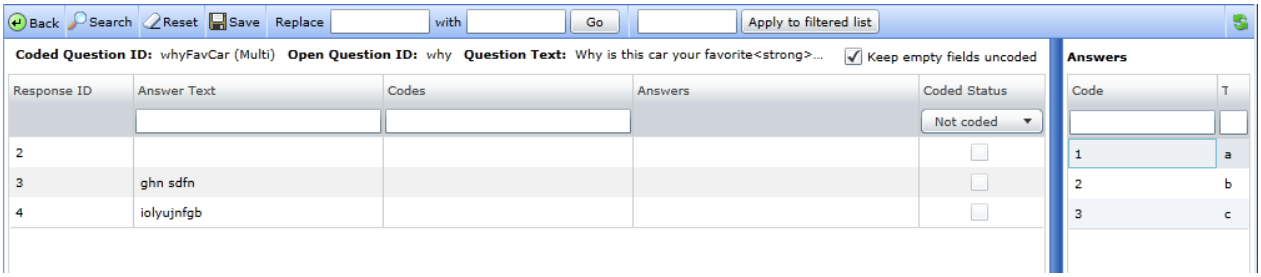


Figure 726 The searching and sorting section

You can filter the list of respondent answers by coded status; view coded and/or un-coded answers. The default is "Not coded", to list all the questions that have not yet been coded. You can also search for a text string and/or code numbers. Use wildcards (*) to find answers that start with, end with, or include a specific string. When the appropriate search criteria have been added, click **Search**.

Search criteria	**How to write the search word**

Includes:	*Text string* or *Text string
Starts with:	Text string, or Text string*

To perform a code search:

1. In the Code field, enter the number of the code(s) to be searched.
2. If searching for multiple codes, separate the codes with commas.
3. Click **Search**.

You can sort the list by Respondent-ID or Answer-text in ascending or descending order. Answer lists are by default sorted by respondent ID (Resp-ID).

Note that sorting and searching is performed on all the answers for the specific question. When sorting/search is changed, the answer list will be refreshed and will return you to the first page of the list.

22.9.1.3. Coding

Coding data is transferred on a page-by-page basis (not for the entire working data at once), the maximum number of answers that can be displayed on the page while coding is set in **Confirmit > Home > User Settings > Coding screen size filed**.

To code an answer:

1. Read the Answer Text you wish to code.
2. In the Answers Frame in the upper-right corner of the window, choose a code appropriate to the respondent's answer.
3. Type the code into the Codes field for the selected answer text.
4. Use the Enter key or the arrow keys on your keyboard to move the cursor to the next field.

   The Answers Frame text corresponding to the typed code is added to the Answers column opposite the Answer Text.

As answers are coded, updates to the page are made when you click **Save** or the navigation buttons. You will then see only the remaining un-coded answers.

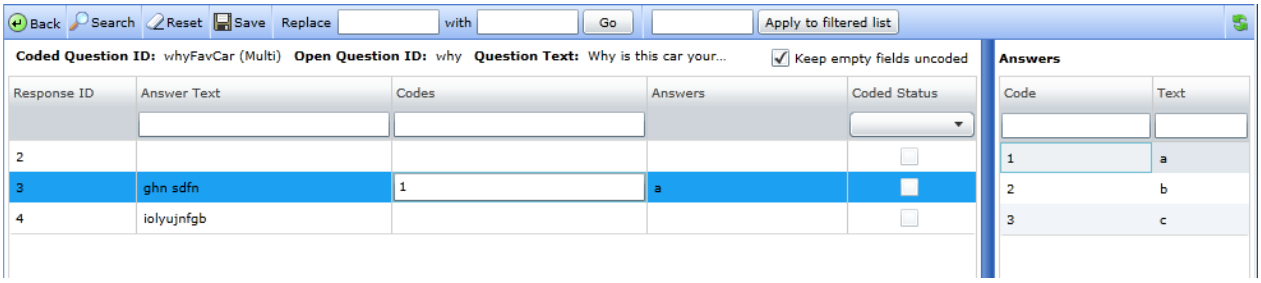


Figure 727 Coding the answers

The Codes that have been added originally to the single/multi question (those that are displayed in the Answers Frame) might be changed or added to. Whenever a code is changed or added, it is reflected in the code field with the corresponding code words (such changes will take effect only after survey re-launch).

Each answer has a corresponding edit box. Arrow keys or the **Enter** key can be used to move between these edit fields. The codes that are added or changed are saved whenever the navigation keys are pressed or the **Save** button is clicked.

Codes must be entered that correspond to the codes defined for the single/multi question. Should a code be entered which is not included in the code list of the single/multi question, a system-generated error message will appear, warning you that a valid code must be entered.

For answer alternatives with multi-punches, separate the codes with a comma, a dot or a space.

If you wish to stop coding one question and start coding another, click the **Back** button. This will return you to the list of assigned questions, where you can select another question to work with.

If you check the **Keep empty fields un-coded** box, the answers that have been shown on a page but which have not been coded, will be re-displayed the next time you search with the search property **Uncoded** selected. If you do not check the **Keep empty fields un-coded** box, the answers will be counted as coded once they are displayed on a page.

If you check the **Suppress empty fields** box, any answers that have been left empty by interviewers will not be included in the answers list. If you do not check the **Suppress empty fields** box, any empty answers will be displayed.

22.9.1.4. Navigation

Navigate through the set of respondent answers in the current question by using the arrow buttons below the answer list. The total number of responses to be recoded is given as the Count, and the full list of responses is divided into pages. The number of responses on each page is specified in the "Coding Screen Size" (see Coding Screen Size on page 667 for more information) property in the User Settings page (see User Settings on page 134 for more information).

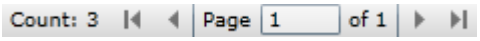


Figure 728 The Navigation buttons

Click on the navigation buttons to save the data shown for the current displayed code. Use the **Save** button to save codes on completion or when an interruption in the coding is expected.

22.9.1.5. The Replace Function

The replace-function is similar to a global replace. It can be used to re-code answers in order to sum up different codes under an "over code". An example could be that you want to put all answers which have been coded for one category into another category.



Figure 729 The Replace function

Note that this operation replaces the codes and is IRREVERSIBLE, so the replace function should be used with caution. A warning message is displayed showing which codes will be affected. If the codes are correct, click **OK** to continue, otherwise click **Cancel** to end the operation.

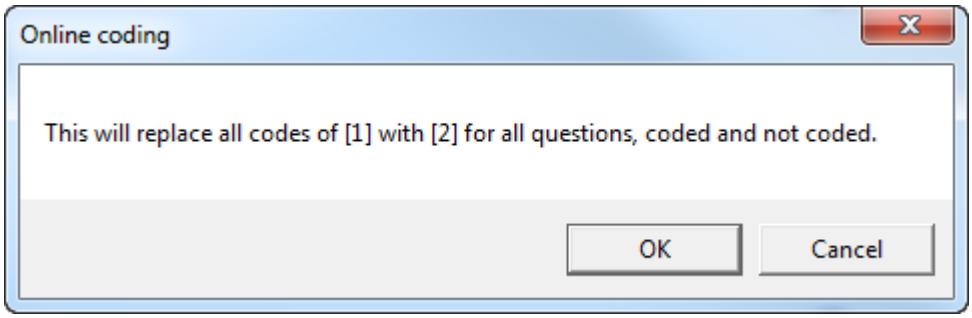


Figure 730 Example of a Warning

An error message will also be generated when the coder tries to use a number that is not on the list of codes defined in the code list of the single/multi question.

22.9.1.6. The Apply to Filtered List Function

If you have created a filtered list, you can apply any code(s) entered to the entire selected list. To do this, click **Apply to filtered list**.

Note: For open-text questions coded by a Multi, you can specify one or several codes to apply to the list. Separate the codes using any of supported delimiters; dot, comma or space. The code(s) will be appended to the selected list, and the process will not remove any existing codes.
However, if the "open text" questions are coded by a Single, then only one code can be specified to be applied to the list. In this case, the entered code will replace all existing codes in the selected list.

22.10. Step-by-Step Guide for Online Coding

1. To change the default user settings for Coding Screen Size (default size is 15), go to the **Home > User Settings** menu command and edit the default size. Click **Save** to save the changes. (Coder)
2. Go to the **Survey management > Permissions** menu command for the survey. You can now grant coding access to online coding administrators and coders. (Survey Administrator only)
3. In the questionnaire tree, drag and drop one single/multi question for each open/open-ended question (answer) to be coded. (Survey Administrator only)
4. For each of the single/multi questions belonging to an open-text question, fill in the applicable codes in the answer window. Open the properties window and fill in the associated open/open-ended question (answer) ID and check off as "hidden". (Survey Administrator only)
5. Launch the survey. (Make sure no other changes that can affect the respondent database are made before doing this).
6. Go to the **Survey Data > Coding > Administrate Online Coding** menu command. (Coding Administrator)
7. Assign the coders to the questions. (Coding Administrator only)
8. Go to the **Survey Data > Coding > Online Coding** menu command. (Coder)
9. Click on the hyperlink of the question you wish to begin coding. (Coder)
10. The coding window appears showing the list of answers for the chosen question. The answers will appear in Response ID order. (Coder)
11. You may now search for certain strings or codes to simplify your work with the answer list. Answers can also be sorted by the table headings. (Coder)
12. In the Code fields for the answers, type in the codes appropriate to the respondents' answers. The selection of codes you can choose between is displayed in the Answers Frame in the upper-right corner of the window, and these are those defined in the single/multi question you have associated with the original open-text question (answer).

23. Survey Reporting

This chapter describes the various methods and functionality available to create reports using the data you have collected from your surveys.

23.1. Instant Analytics

Instant Analytics is a "standard" simplified report that you as the survey designer can create when you launch the survey. The general layout of the report is preset and cannot be changed.

When you have created an Instant Analytics report for a survey, the report will be accessible to Confirmit Professional users and end users depending on the access permission set for those users. The Professional user access permission is set in the **Survey Management > Permissions** page (see Permissions on page 185 for more information), whilst access for end users is set via the **Survey Management > End Users Reporting** page.

The report is intended to enable the user to quickly view the survey status, quota information and responses, and interactively perform cross-tab analysis on the data. You can also save reports and export the raw data.

Once you have created the report, Professional users will be able to access it via a link on the survey overview page. If changes are made to the survey, for example new questions are added, then when you compile the survey you can also select to update the report. The data presented in the tables and charts in the report is updated automatically as respondents reply to the survey.

You can create "versions" of the report by specifying which interview statuses and questions are to be displayed and then saving a copy of the report.

Note: The Instant Analytics report only accepts data from the Production database. So until some respondents have replied to your survey, the tables and graphs in the report will be empty.
Instant Analytics is not currently supported in Safari.

Instant Analytics can handle up to 100 000 responses, including all statuses except "Not answered", with a limit of 2000 questions per survey. If the survey has less than 100 000 responses then you will be able to select the Update Instant Analytics Report box in the Launch Survey page.
In the event the Exclude from reporting property has been set for questions in the survey, these questions will also be excluded from the IA report.

IA reports can include a maximum of 200 open text or open text list questions. In the event a survey with more than the maximum is launched with the IA report option selected, the launch will abort with an error message. If this occurs, you must open questions you wish to exclude and select the Exclude from Reporting option, until you have fewer than 200 such questions.

23.1.1. How to Create the Instant Analytics Report

The Instant Analytics report for a survey is created when the survey is launched. If changes are later made to the survey, when you re-launch you can then select to update the report. Note that if you do not select to update the report, then any changes you may have made to the survey will not be included in the report.

1. Go to the **Designer > Launch Survey** menu item.

   The Options dialog opens.

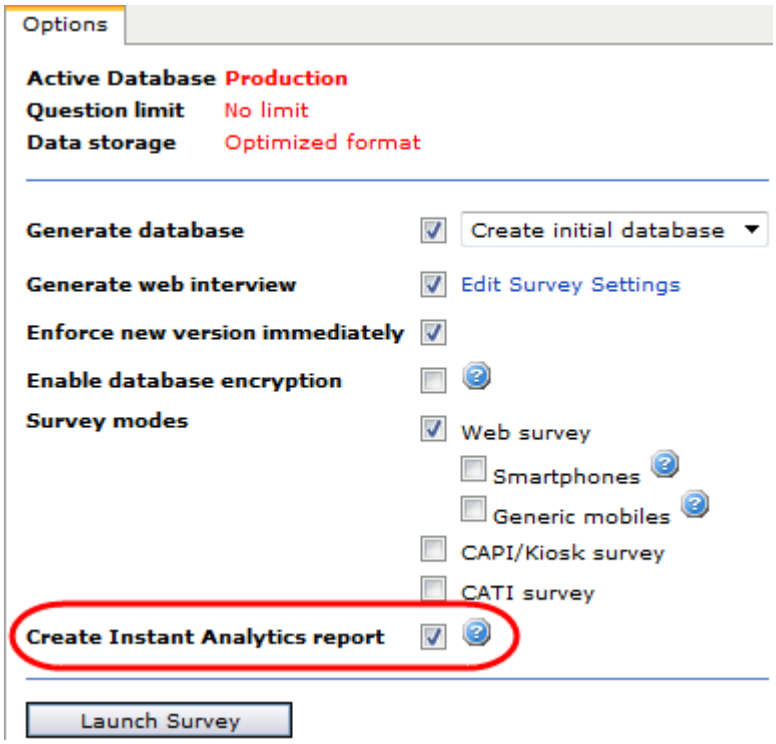


Figure 731 The Launch Options dialog

2. Check the **Create Instant Analytics Report** box.

   Instant Analytics supports up to 100 000 responses. If the survey has less than 100 000 responses then this box will be available to you. Once the IA report has been created, the button text changes to Update Instant Analytics Report.

3. Click **Launch Survey**.

   The launch task is run. On completion, to view the report, copy the URL that is available in the **Survey Management > Overview** page into your browser, or go to the **Reporting > Instant Analytics Report** menu item.

Note:
1. The Instant Analytics report only accepts data from the Production database. So until some respondents have replied to your survey, the tables and graphs in the report will be empty.
2. Once the Instant Analytics report is created, if you add questions or make changes to question categories in the survey these questions will not appear in the report automatically. You must delete the instant analytics report and create a new report for these changes to appear.

23.1.2. The Report Layout

The layout of the Instant Analytics report is "standard" and cannot be changed. The tab bar can contain up to four tabs. The Overview and Responses tabs will always be visible; the Quotas and Verbatims tabs will only appear if the survey contains quotas and verbatim questions respectively.

If you have Administrator permission to your system then you can add a logo to the upper-right corner of the report page. To do this, in Horizons Authoring, go to the **Home > Company > Company Settings** menu item and then to the Branding page. Once here, add the URL to your logo file into the IA Report Logo field, then save the changes.

23.1.2.1. The Report Overview Tab

The report opens at the Overview tab.

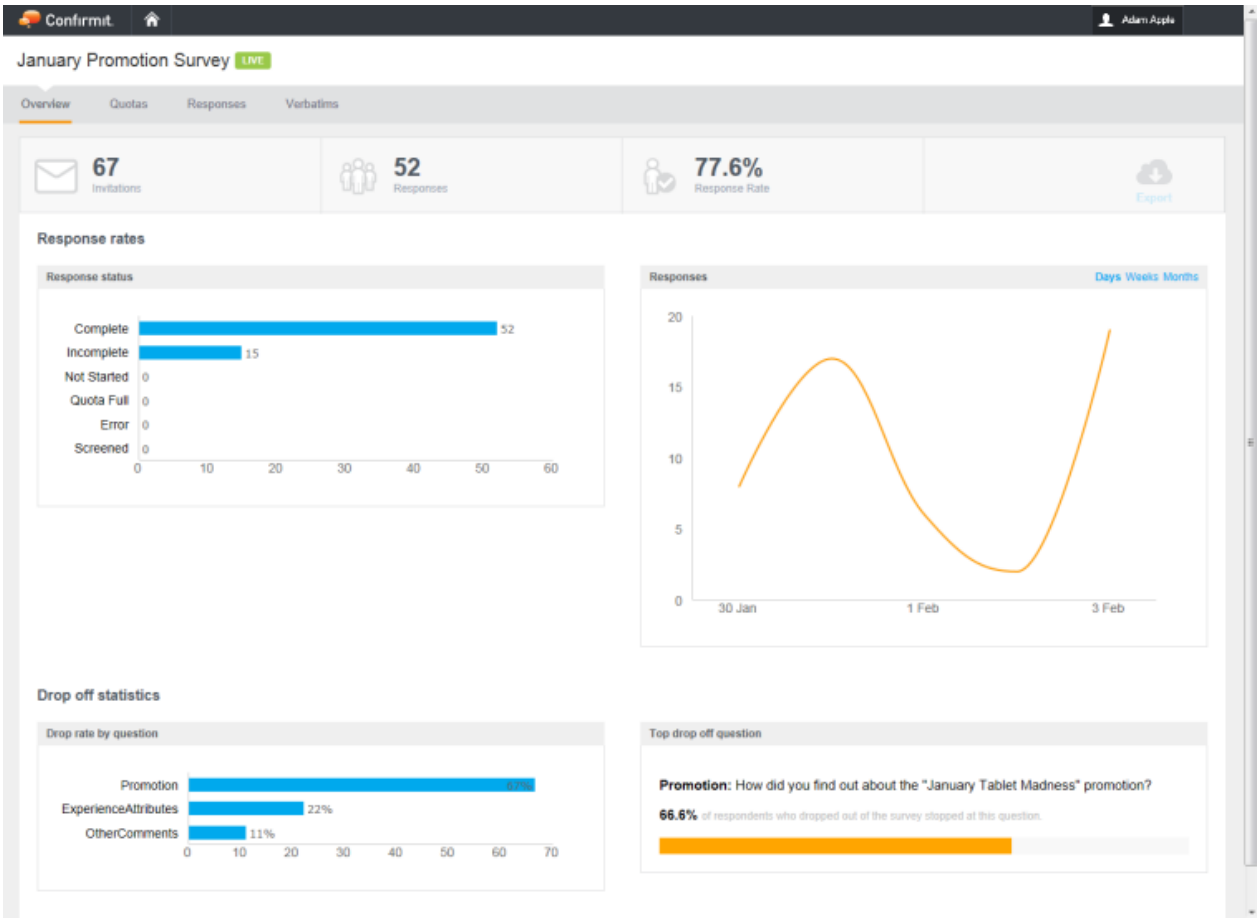


Figure 732 The Overview tab page layout

The report title shown towards the top left corner of the page is always the name of the survey. An indicator beside the title (green for live and red for closed) shows the current state of the survey. Note that for a live survey the data will be updated continuously.

The Responses bar shows the current number of responses, and the Completion rate. If the survey is limited with some invitation emails having been sent, then this will be the response rate as a percentage of the number of emails sent. In addition, the number of invitation emails sent will be given.

The Responses chart can show the responses aggregated by day, week or month.

In the event some of the respondents have left the survey before completing it, the Drop off statistics area shows the first question on the page at which the respondent(s) left the survey. The Top drop off question shows the question at which the majority of non-completion respondents left the survey.

Hover the mouse pointer over a chart to show details about that bar or point in the chart.

23.1.2.2. The Quotas Tab

The Quotas tab gives an overview of the quotas used in the survey, with details of limits, counts, remaining (limit - count) and percentage achieved.

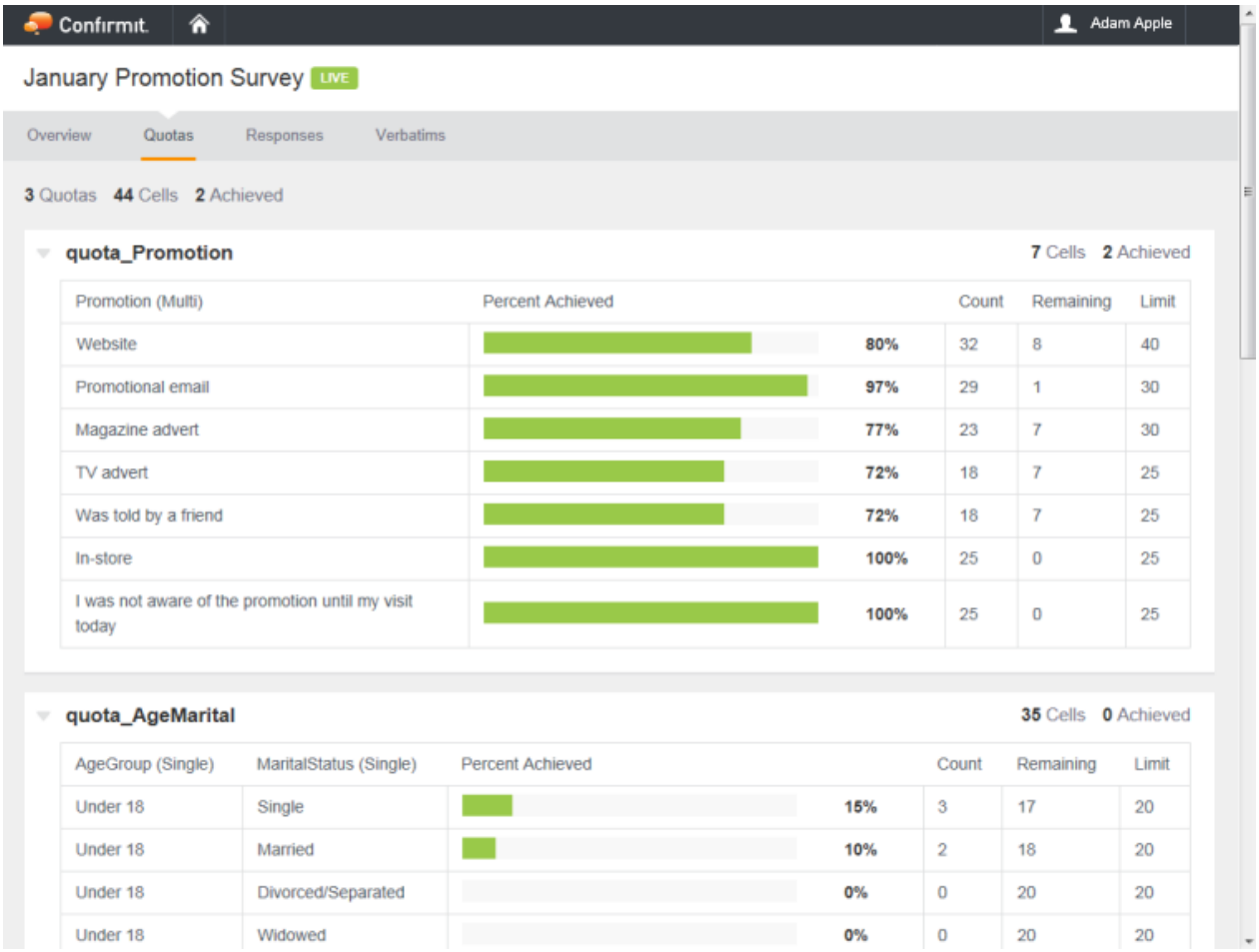


Figure 733 Example of the Quotas tab

- The top row in the tab gives the number of quotas in the survey, the total number of quota cells, and the number of quotas that are currently achieved.
- For each quota in the survey is then displayed a breakdown of the individual categories by cells.
- Each quota can be collapsed as necessary to simplify viewing.

23.1.2.3. The Responses Tab

The Responses tab lists all the survey questions that you wish to be included in the report, giving all the answer options for each question and the count and percent results for each answer.

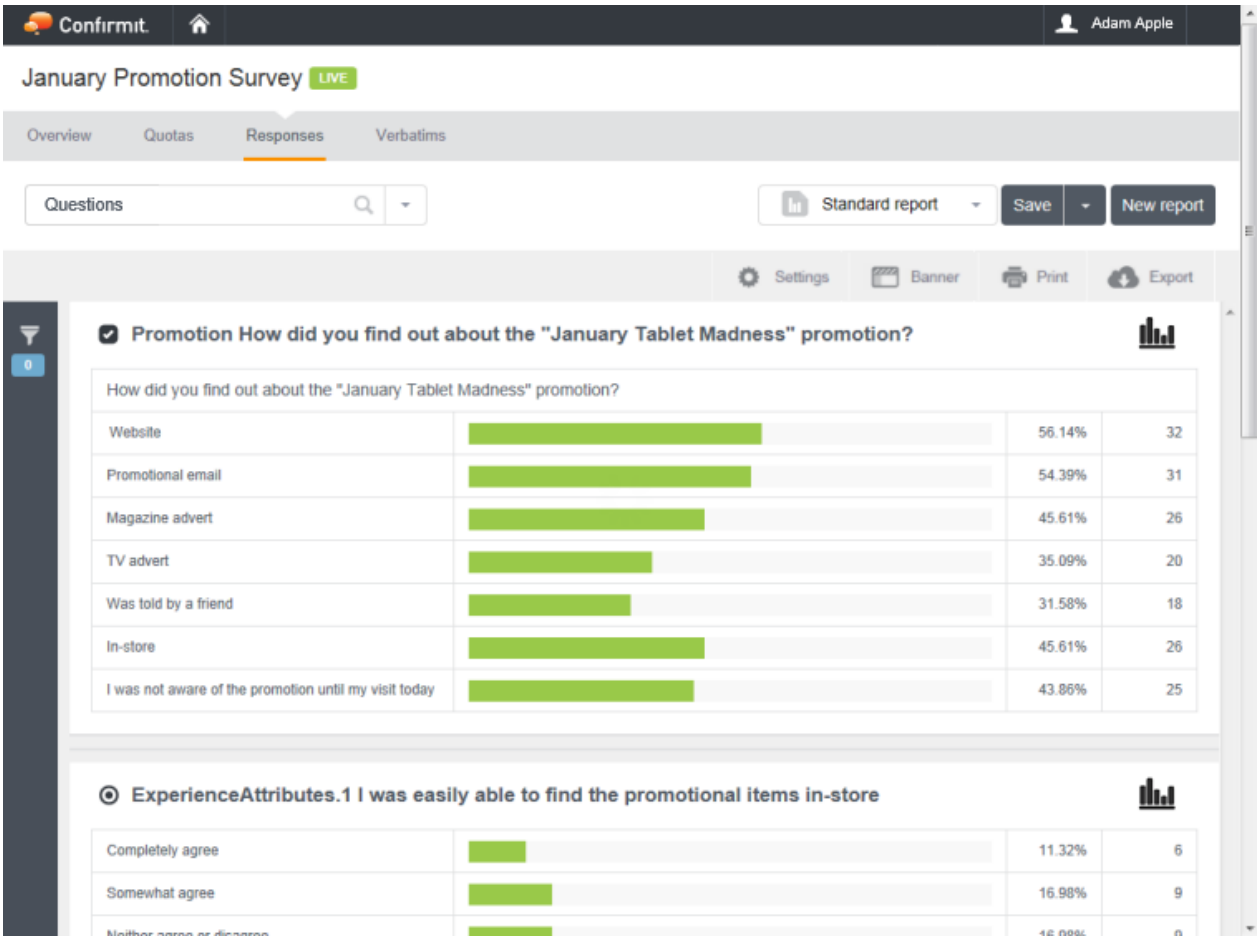


Figure 734 Example of the Responses tab

- The report may include a large number of questions. To save time, those questions lower down on the page will be loaded as you scroll down to them.
- A Question Navigator field in the upper-left corner of the page allows you to find particular questions, show or hide questions in the report, and re-order the questions (see The Question Navigator on page 677 for more information).
- Each question has an icon beside the question text to indicate the type of question. For example indicates a single question, indicates a multi question and indicates a ranking question.
- A Chart icon for each question displays the data for that question in chart format (see The Chart on page 679 for more information).
- A filter allows you to specify a date range for interview start, and which interview statuses are to be displayed (see The Filter Area on page 691 for more information).

23.1.2.3.1. The Question Navigator

Click in the Question Navigator to display a list of all the questions in the report.

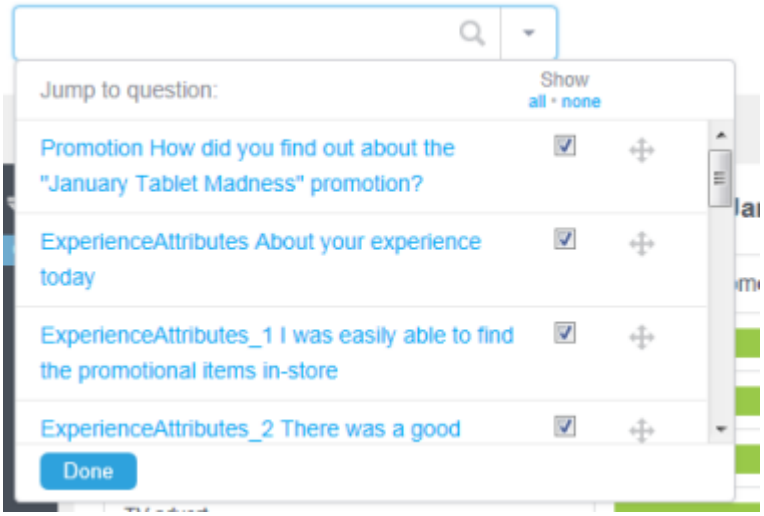


Figure 735 Example of the Question Navigator

- Scroll to and click on a question in the list to jump to that question in the report.
- Type a text string into the search field to reduce the question list to only those questions that contain the text string in the question id, then click on the desired question to jump to it.

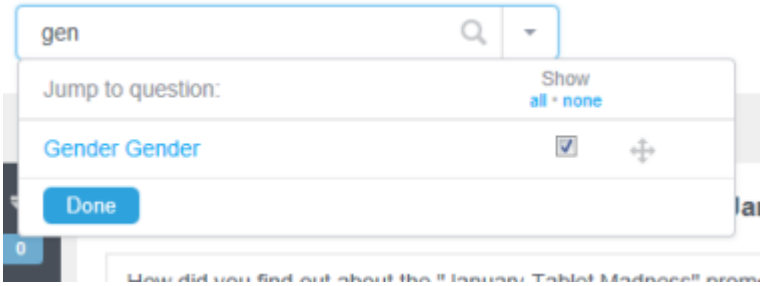


Figure 736 Using the question search field

- To show or hide questions in the report, select or deselect the questions in the Show column. You can select or deselect all the questions simultaneously by clicking **all** or **none** respectively.
- Rearrange the order of the questions in the report by dragging the questions. Click on the icon for a question and drag it to the desired position.

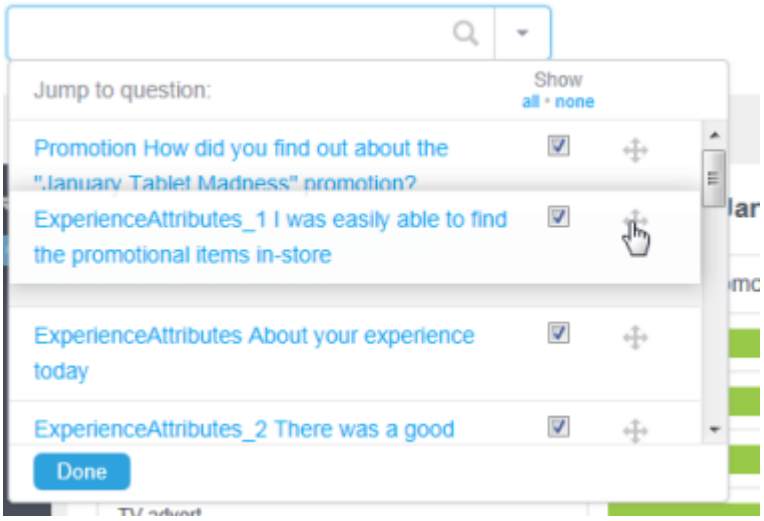


Figure 737 Changing the order of the questions in the report

On completion, click **Done** or click outside the Question Navigator to close the field.

23.1.2.3.2. The Chart

Click on the Chart icon for a question  to display the data for that question. This will by default be presented in pie-chart format, but if a banner has been used then it will be in bar-chart format.

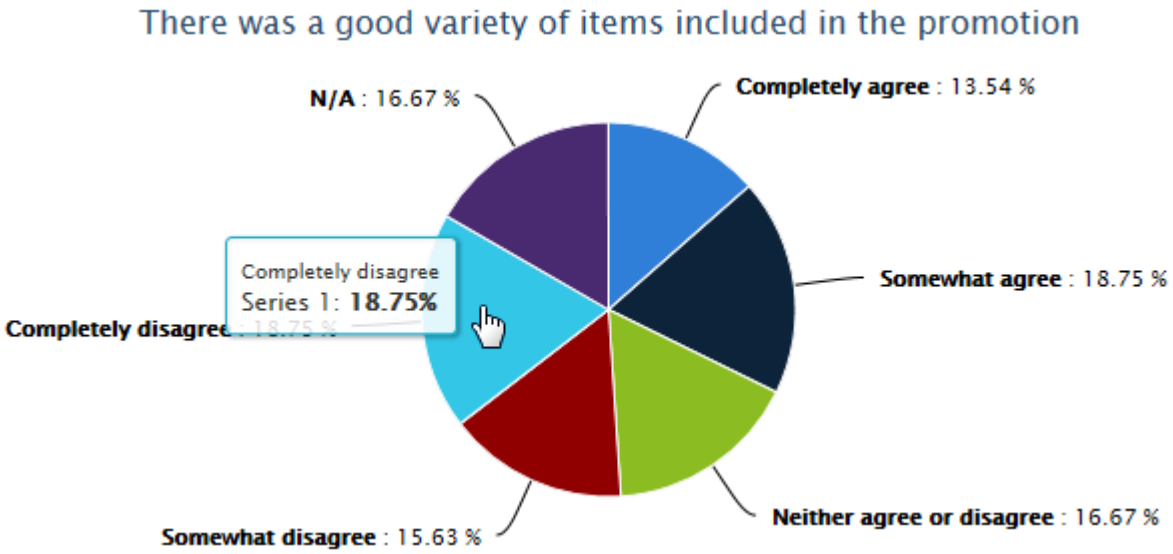


Figure 738 Example of a pie chart for a question

- Hover the mouse pointer over a segment of the chart (or its label) to show the details of that segment. As you move the pointer to a different segment the details will change.
- Click in a segment to "extract" that segment from the chart and display the details. You can now move the pointer anywhere in the chart and the details will display for the selected segment. Click again in the segment to "replace" the segment into the pie chart.

23.1.2.3.3. Settings

The Settings menu allows you to apply Significance Testing, select whether you show the results as counts, percentages or both, and show or hide the totals.

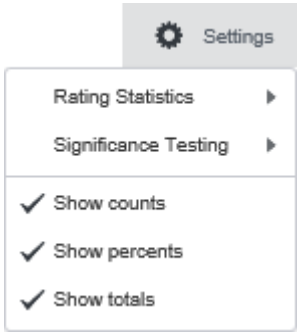


Figure 739 The Settings options

If the survey has a weight model for use with the IA report (the model must be named IAWeight), then the option **Show weighted data** will be available in the menu (see Weighting in Instant Analytics on page 693 for more information). If no IA weight model is available, the menu option will not be listed.

Rating Statistics allows you to show only the specified number of elements in the table. For example, if you select Top 2, only the top 2 elements will be displayed, or if you type 5 in Top N, only the top 5 elements will be displayed; the other elements will be removed from the table. You can also type the % character into the field after the figure - in this case the top/bottom x% of the elements will be displayed.

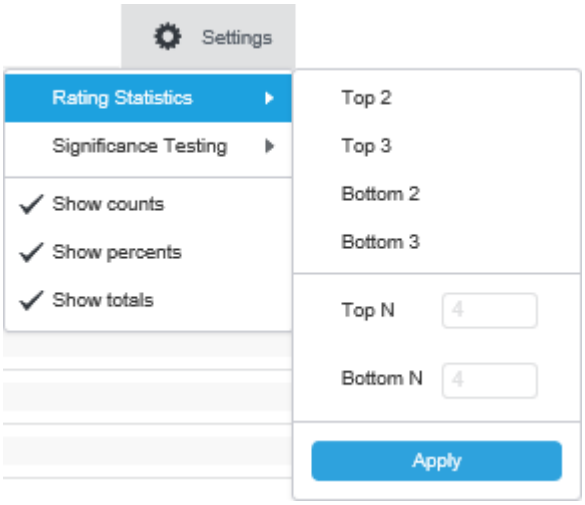


Figure 740 The Rating Statistics options

You can also perform Significance Testing on the results - select **Significance Testing** and choose a suitable confidence level. The higher the confidence level, the more certain you can be that there really is a difference in the two groups being tested. For example, 90% confidence means that there is a 10% chance that a difference in scores could have been found purely through the effects of sampling.

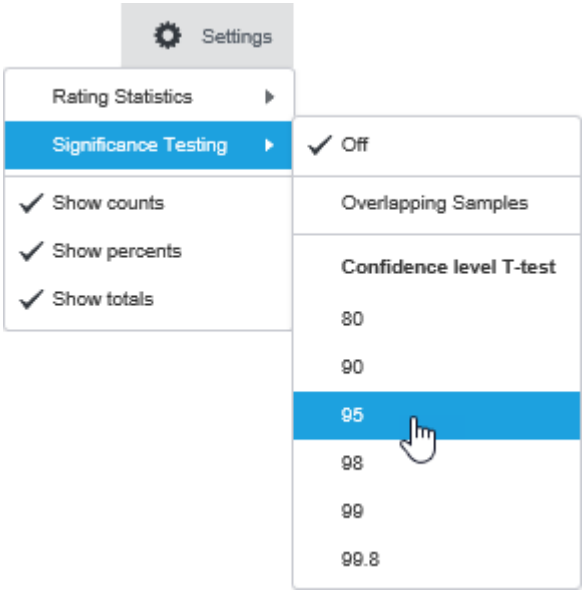


Figure 741 Selecting a confidence level

Most of the statistical tests are based on standard t tests that assume that the two samples being compared are independent of each other. When the columns of a table are formed from the categories of a multi question, data from the same case can be present in both of the columns being tested. This is known as overlapping data, and it means that the two samples cannot be considered independent. Overlapping Samples should be used when the columns to be tested contain data that are not independent. A separate algorithm “Choi-Stablein” should then be used to calculate the significance test.

The settings in this menu will be maintained in saved reports and exports. Once the functionality is enabled and a banner is applied to create a table, Significance Testing will automatically highlight applicable table cells in green, and letters will indicate the comparable columns. Note that this feature uses the same column proportional T-test as Reportal, but is limited to a single level of confidence.

Check or uncheck the options as required. Note that you must have at least one of the counts and percents options checked; you cannot uncheck both.

23.1.2.3.4. How to Create a Banner

A banner is a collection of segments where each segment makes up a column in the results tables. You create a banner in the Responses tab. You can create one banner in Instant Analytics, and if you chose to use the banner then it will be used for all the questions in the Responses tab.

1. Click the **Banner** button, then click **Edit banner**.

   The Edit banner overlay opens.

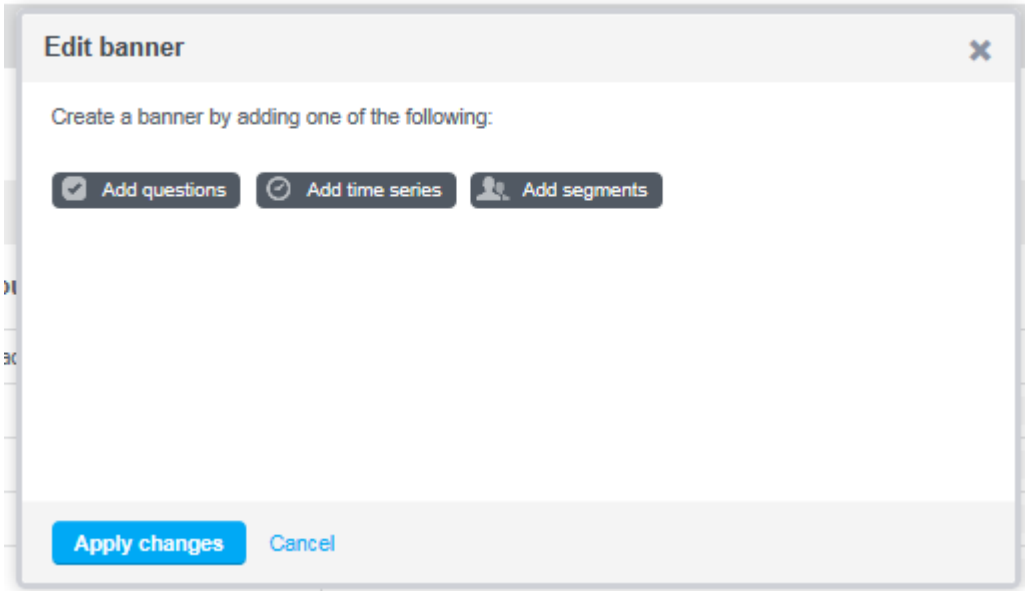


Figure 742 The Edit banner overlay

You can create the banner by adding questions or time series.

To add questions:

2. Click **Add questions**.

   A list of the questions in the survey is displayed.

3. Click on those questions you wish to add to the banner to check the boxes beside the questions.

   The icons located between the check-boxes and the questions indicate the type of question; radio button for a single question, a tick for a multi question.

4. On completion click **Add to banner**.

To add a time series:

1. Click **Add time series**.

   The Add time series overlay opens.

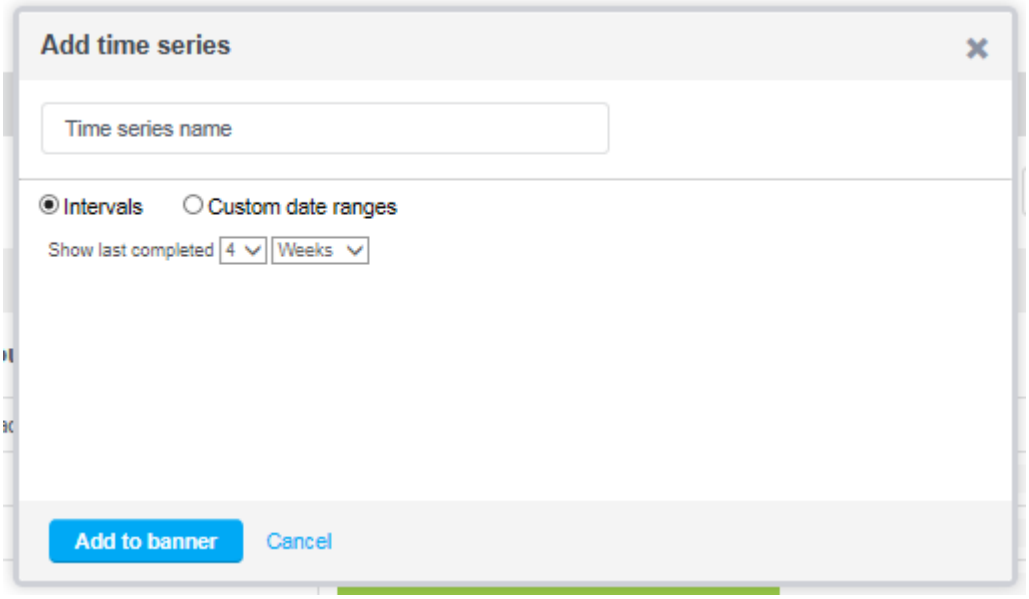


Figure 743 Adding a time series to the banner

2. Type a name for the time series into the field.
3. Select **Intervals** (select thereafter Weeks or Months and the appropriate value) or **Custom date ranges** (add a label if required and select thereafter the dates to be used). Note that you can add as many date ranges as necessary.
4. On completion click **Add to banner**.

To add a segment:

A segment is a filtered criteria comprising a combination of answers that match a particular target group, for example Males aged 25-44 who earn over $50,000. You can create segments within Instant Analytics, save these segments, and then add them to banners when performing analysis in the Responses tab. These segments will then be available to any user of the Instant Analytics report.

1. Click **Add segments**.

   The Add segments overlay opens.

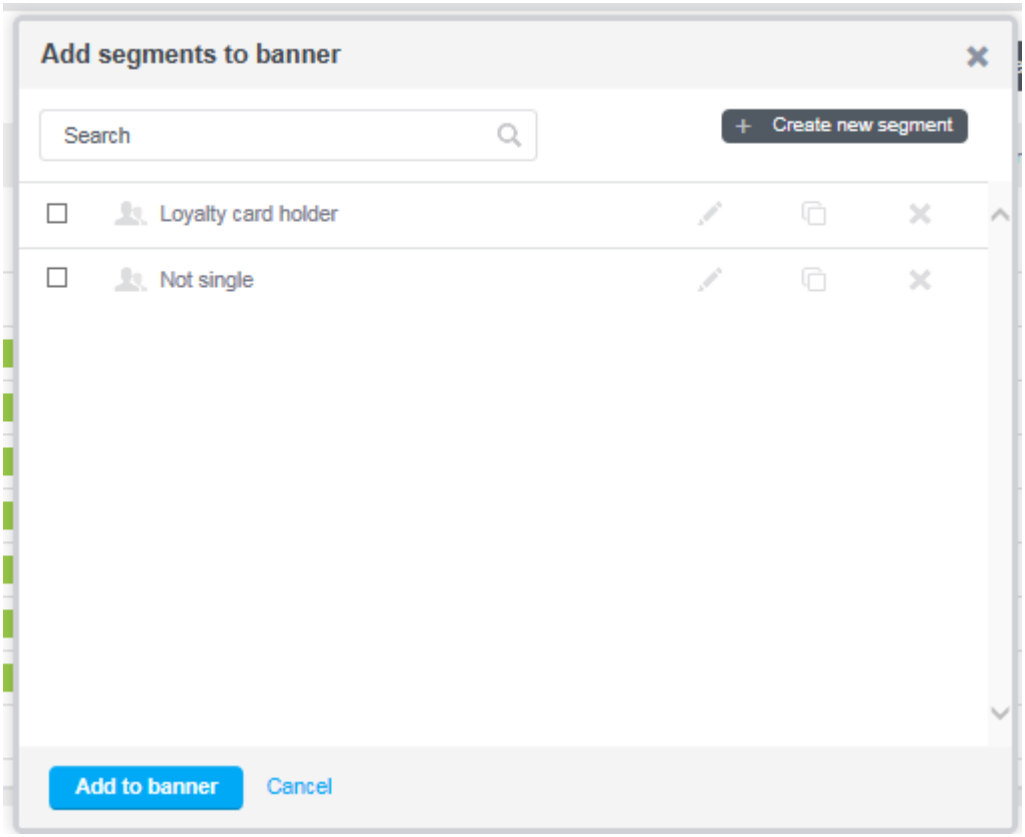


Figure 744 Adding a segment to the banner

Any existing segments are listed. Here you can edit, duplicate or delete them, and create new segments.

2. Click **Create new segment**.

   The Create segment overlay opens.

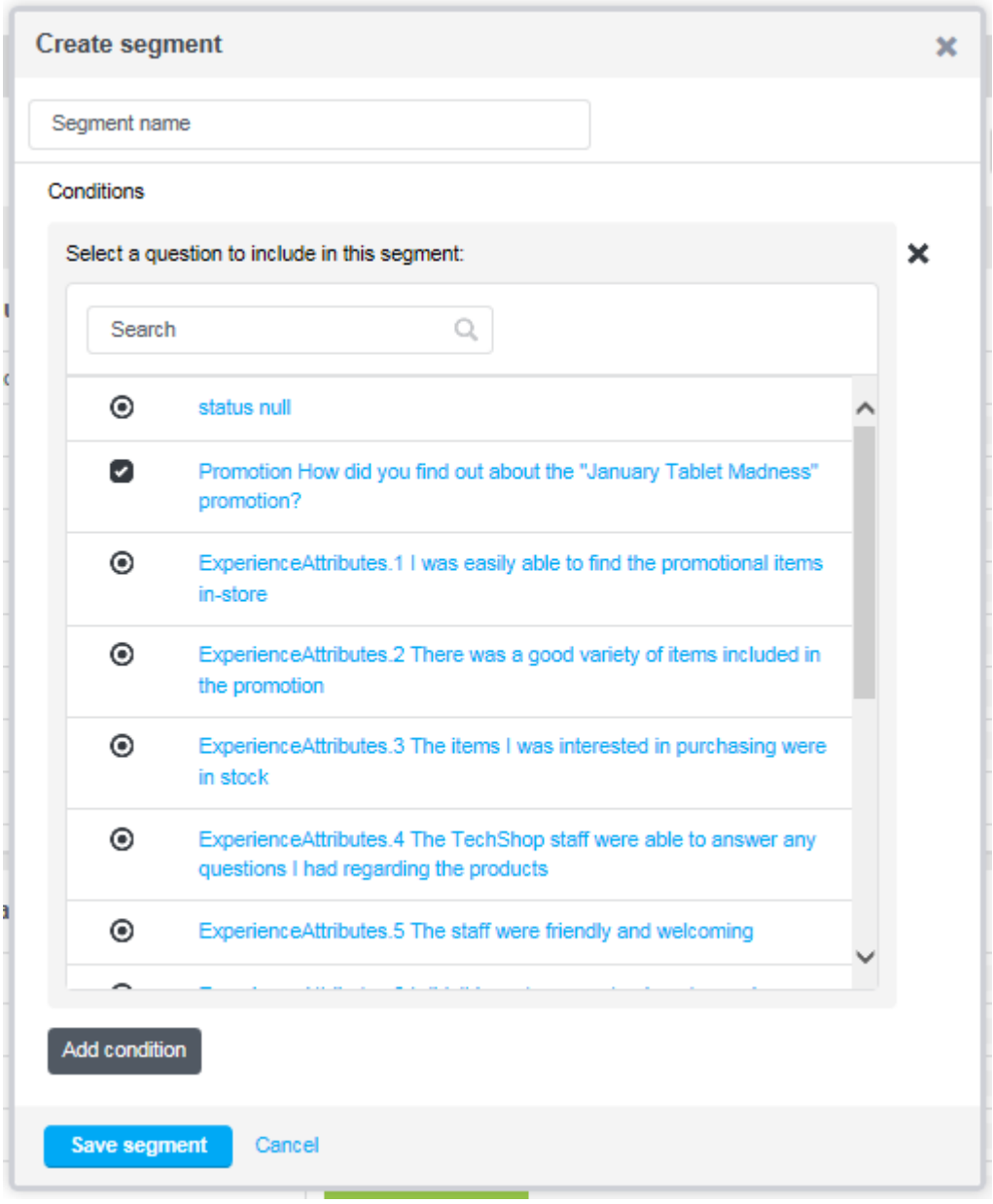


Figure 745 The Create segment overlay

All the questions in the survey are listed. In this example we will create a segment to select for male respondents between the ages of 25 and 44.

3. Type a name for the new segment into the Segment name field.
4. Select a question to add to the segment - in this example the Gender question.
5. The responses available for the selected question are listed.

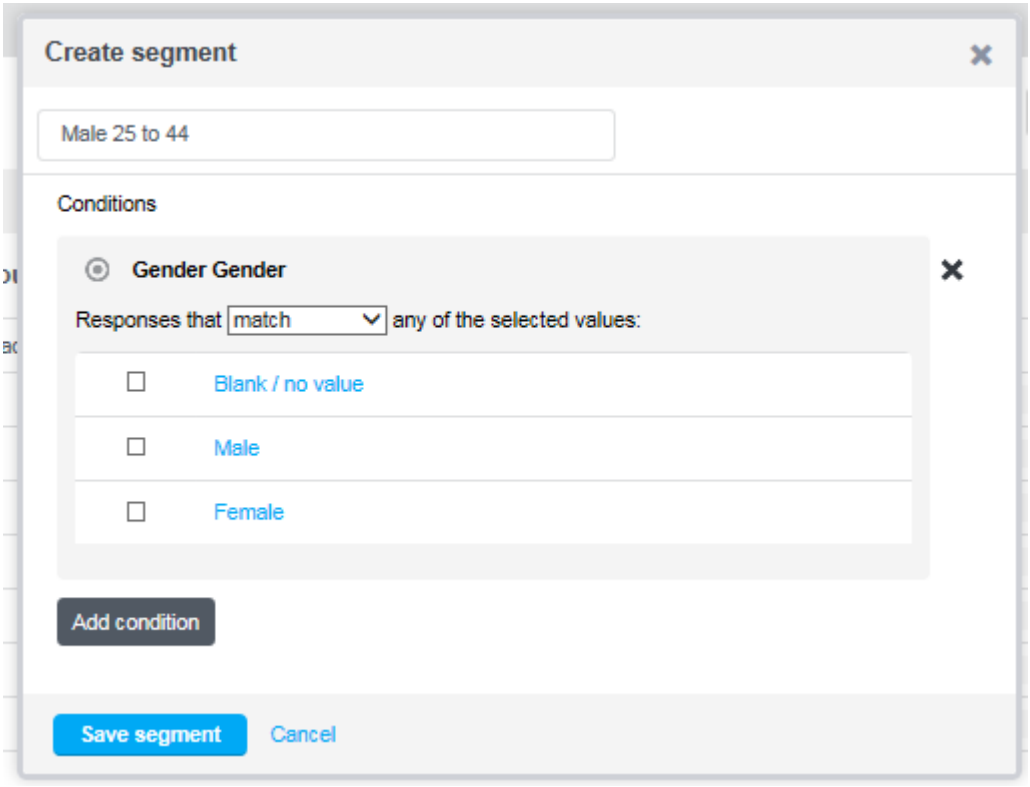


Figure 746 The Create segment overlay with the responses for the selected question

6. Select the appropriate value(s).
7. Select whether you want the condition to match the selected values or not match them.
8. Click **Add condition**.

   The condition is added to the segment, and the question list re-opens allowing you to select additional questions as required. In this example you would now select the AgeGroup question.

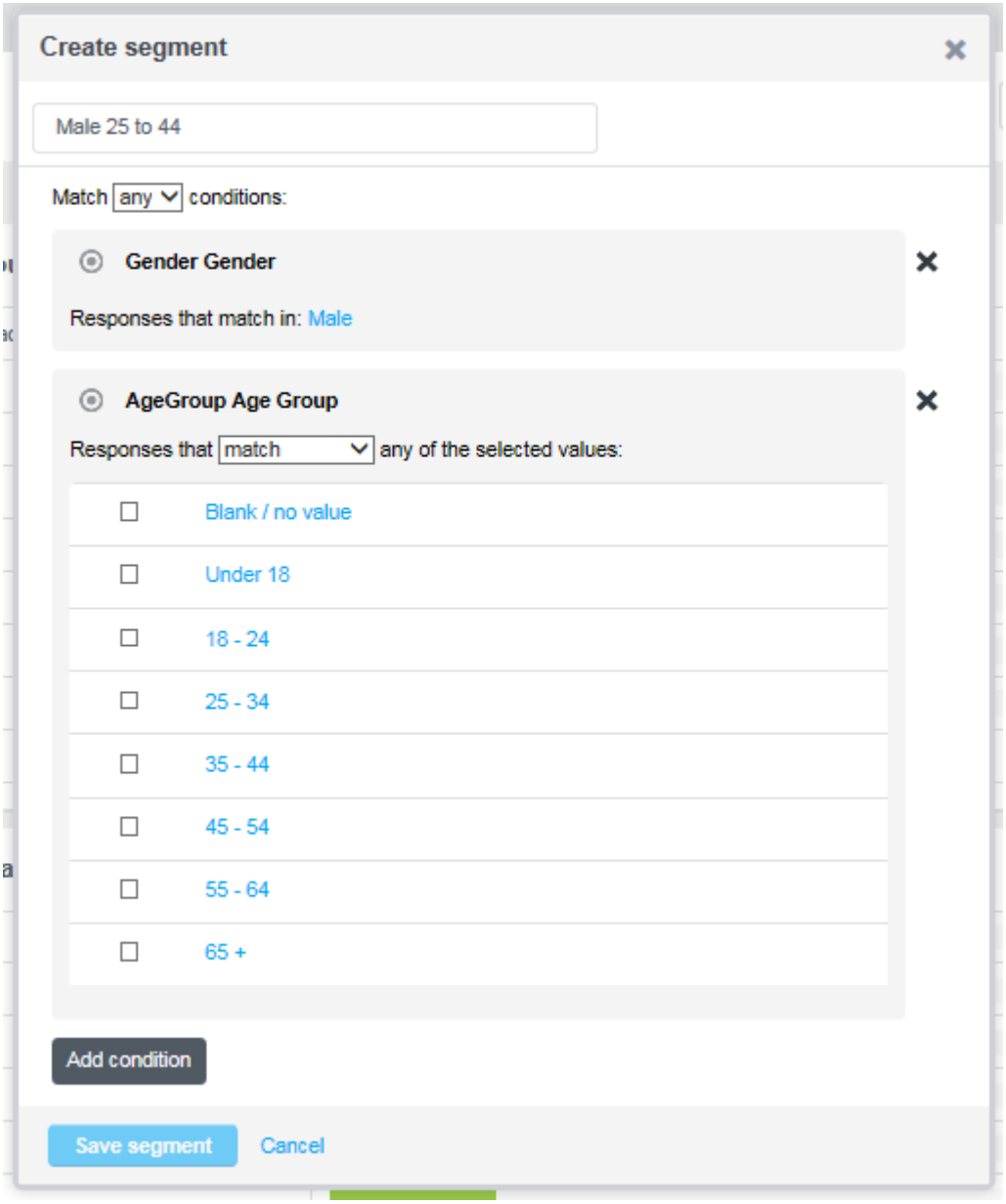


Figure 747 The Create segment overlay with the responses for the AgeGroup question

9. Again, select the appropriate values (for this example check the boxes for 25 - 34 and 35 - 44), and select whether you want the condition to match the selected values or not match them.
10. Assuming you now have the required conditions in the segment, click **Save segment**.

    Note that you can add as many questions to the segment as necessary.
11. Once you are ready to add the segment(s) to your banner, in the Add segments to banner overlay, select the segment(s) you wish to add and click **Add to banner**.

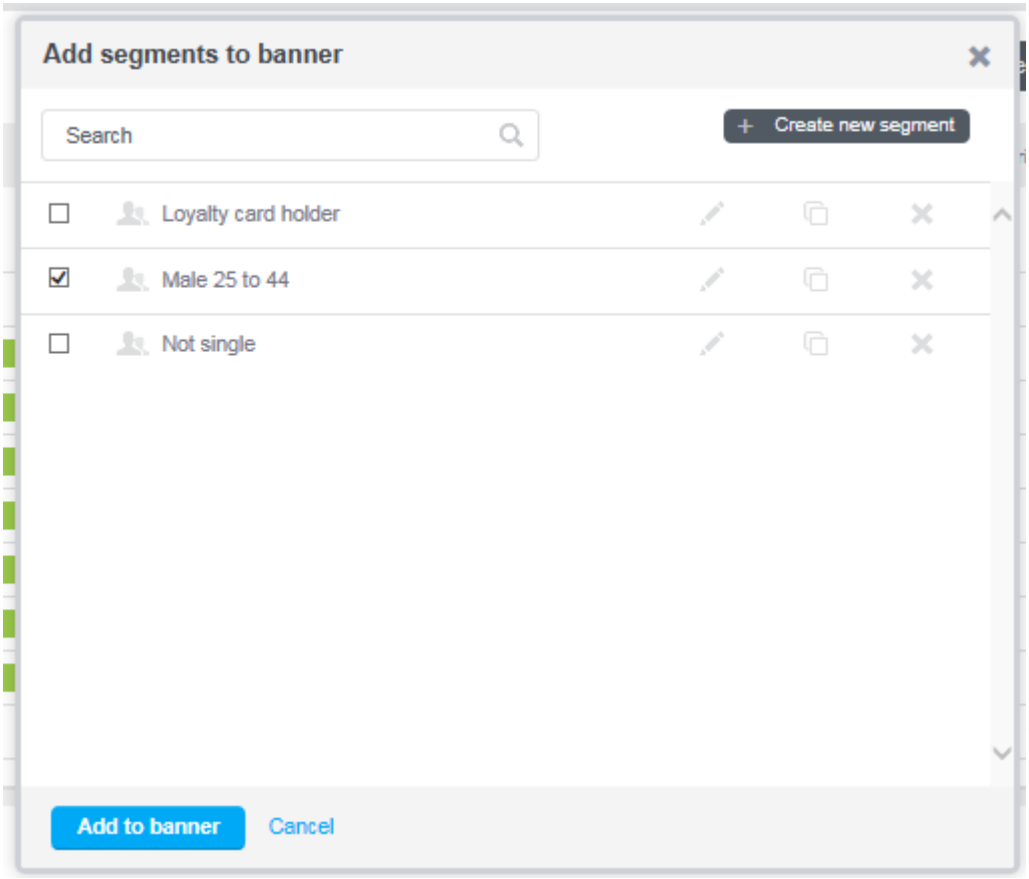


Figure 748 Adding the segment to the banner

Confirming

The Edit banner overlay changes to a confirmation dialog. Here you can nest columns if necessary, re-order the questions you have selected for the banner, or remove them from the banner.

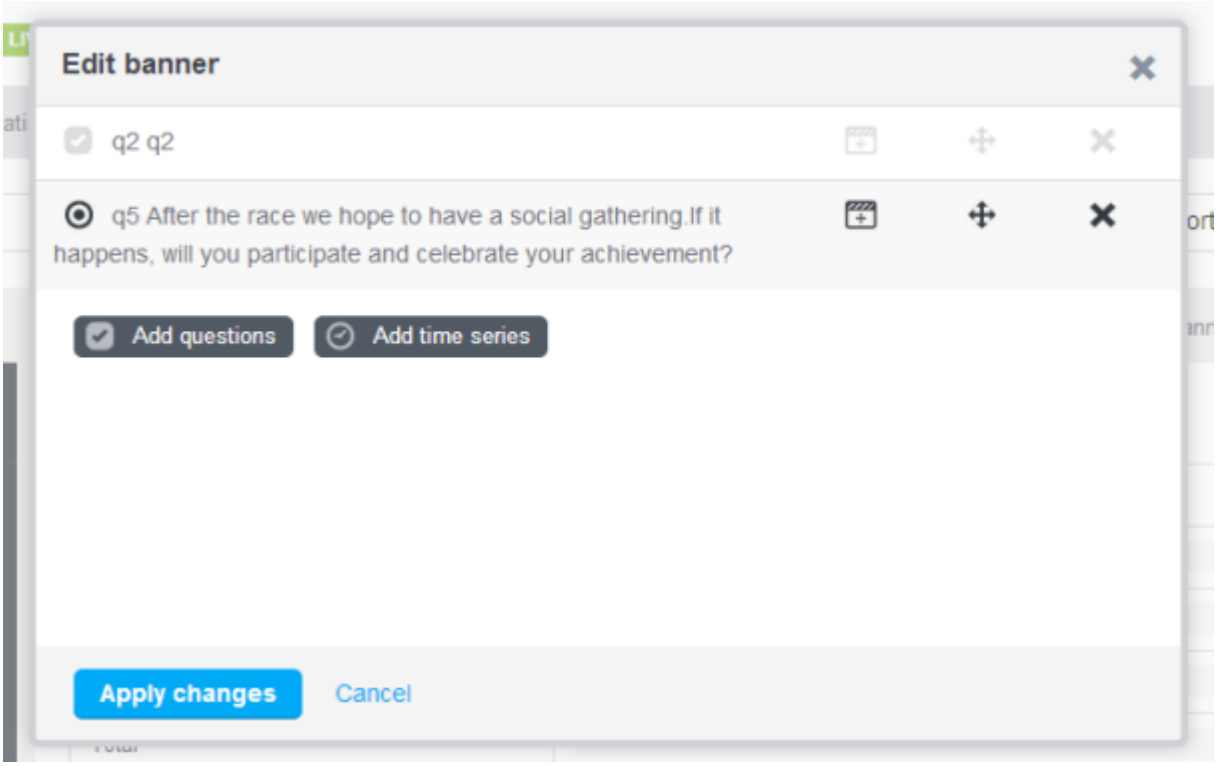


Figure 749 Editing and applying the banner

12. To nest a question, click the **Nest** icon then select **Add question** or **Add time series**.
13. To reorder the questions, click on the **Reorder** icon and drag the question to the desired location.

    Note that any questions that are nested within the question you are dragging will be moved along with the question you are dragging.
14. To add additional questions or time series, click the appropriate button and repeat the procedure above.
15. To remove a question from the banner, click the **X** icon for that question.
16. On completion, click **Apply changes**.

23.1.2.4. The Verbatims Tab

If the survey includes verbatim questions (Open text), then the Verbatims tab is available. This tab lists all the verbatim questions along with the answers given for each.

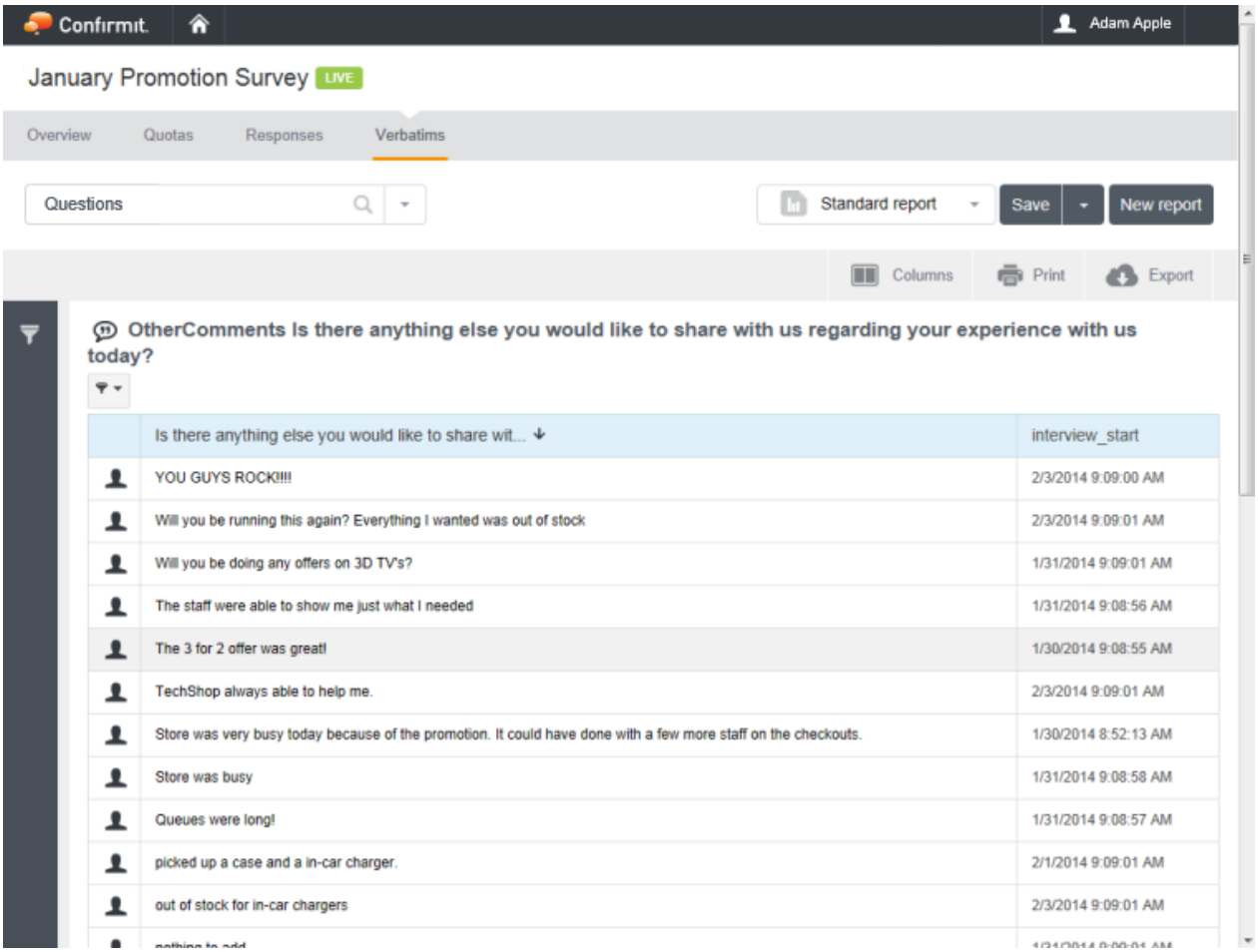


Figure 750 Example of the Verbatims tab

- A filter allows you to specify a date range for interview start, and which interview statuses are to be displayed. If a filter is applied, click **Clear all** to remove the filter and re-display the entire list of questions.
- You can also filter the answers provided for each question. Click the filter icon for a question to open the filter, type the appropriate search criteria into the field and click **Apply Filter**.

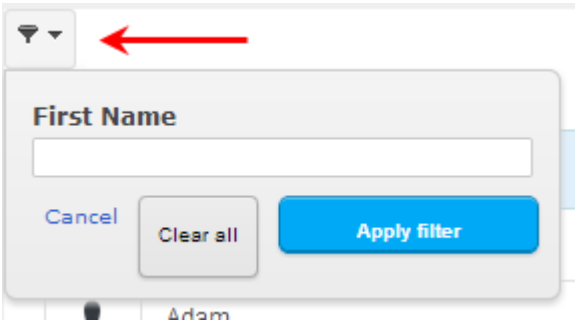


Figure 751 The filter for the answers to a verbatim question

23.1.2.4.1. Columns

You can display the individual responses for selected questions. Click this icon to open a list of the columns available to be displayed. Select the columns you wish to use. By default, only the Interview Start column will be available. To make other columns available:

1. In the Question Designer, for each question you wish to add as a column, go to the question and open its Properties page.
2. On the General tab, type **__VERBATIM_COLUMN** onto the Question Category field.

Note: Type two underscore characters first, then use all upper case.

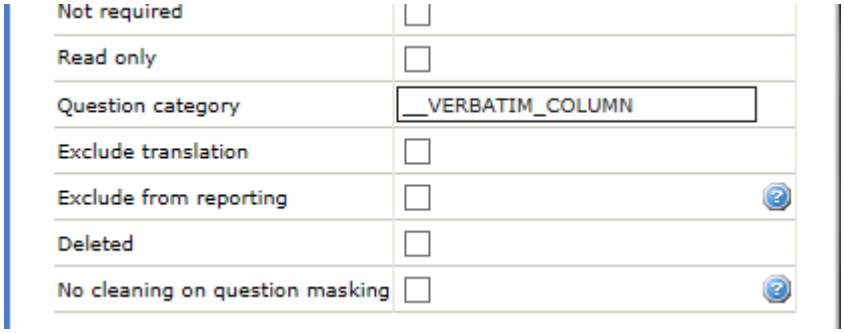


Figure 752 Setting a question to be available in the Columns list

3. Save the changes.
4. Launch the survey, creating/updating the Instant Analytics Report.

   This question will then be available for selection in the Columns list.

   If you wish to add a question as both a column and a filter (see The Filter Area on page 691 for more information), use a semi-colon between the categories, i.e. **__VERBATIM_COLUMN;__FILTER**.

23.1.2.5. The Filter Area

By default the Responses and the Verbatims pages include two filters; the Interview Start date and the Interview Status, to enable the user to filter the data presented on those pages.

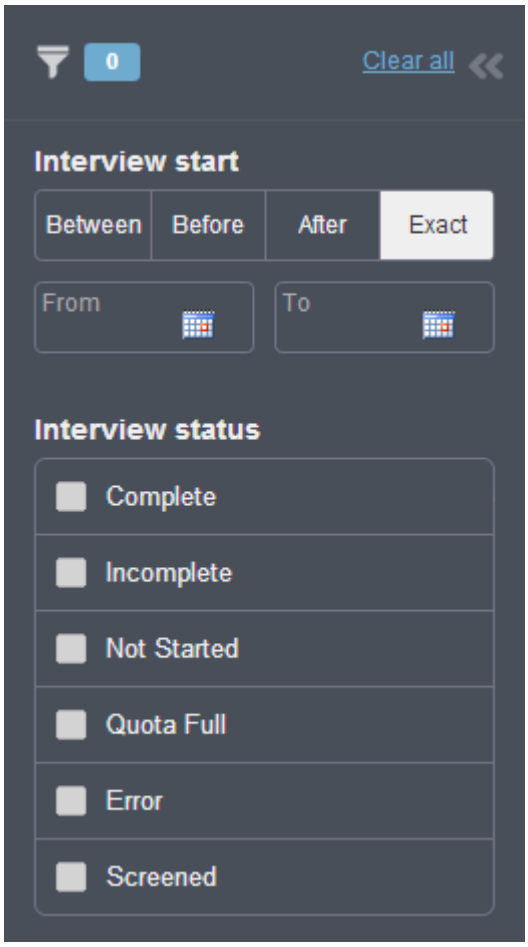


Figure 753 The data filter available on the Responses and Verbatims pages

- Select the desired Interview Start filter type, then select the From and To dates as required, and/or check the boxes for the desired Interview Statuses.

The data presented in the report is updated as you change the filter criteria. If no filter selections are made then all the available data will be presented. Once a filter selection is made, only the data that satisfies the filter criteria will be presented.

The number of filters currently active is shown in the top-left corner of the filter panel.

You can add additional filters to the pages. To do this:

1. In the Question Designer, for each question you wish to add as a filter, go to the question and open its Properties page.
2. On the General tab, type __**FILTER** onto the Question Category field.

Note: Type two underscore characters first, then use all upper case.

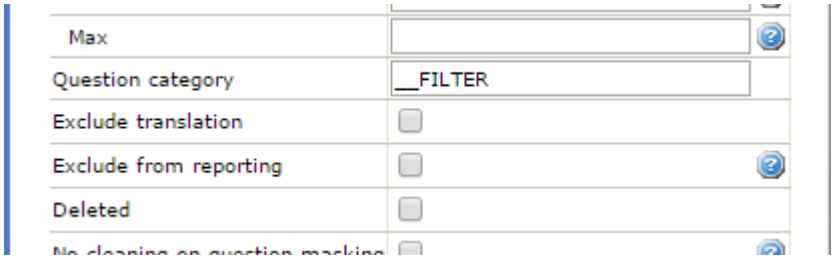


Figure 754 Setting a question to be available as a Filter

3. Save the changes.
4. Launch the survey, creating/updating the Instant Analytics Report.

   This question will then be available as a filter.

   If you wish to add a question as both a filter and a column (see Columns on page 691 for more information), use a semi-colon between the categories, i.e. **__FILTER;__VERBATIM_COLUMN**.

23.1.2.6. Weighting in Instant Analytics

You can apply weighting to the data presented in the Instant Analytics report to adjust the data presented in the report such that it reflects the "real world" situation. IA will only support one weight model, and this must be specially created and named for IA. In the IA report, the weighting will only be applied to the data displayed in the Responses tab. When the report is initially opened, the default setting will be that no weighting is applied to the data.

To create a weight model for use with Instant Analytics:

1. When in the survey, go to the **Reporting > Weighting** menu item.

   The Weight Model List page opens.

2. Create a new weight model (see How to Create a New Weight Model on page 727 for more information), and name the model **IAWeight**.

Important
The Instant Analytics functionality will only recognize the weight model if the model is named correctly. Only the name of the weight model can be IAWeight; the weight model ID must be different and must be in all lower case. If you also use the weight model name as the weight model ID then an error will be generated.

3. After setting the weight model up as required, launch/re-launch the survey.

To apply the weight model to the data in the report:

1. Open the IA report and go to the Responses tab.
2. Go to the **Settings** menu.

   If the survey has a weight model for use with the IA report (the model must be named IAWeight), then the option **Show weighted data** will be available in the menu. If no IA weight model is available, the menu option will not be listed.

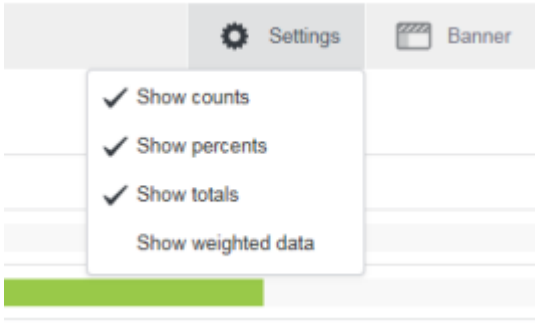


Figure 755 The Settings menu when a weight model is available

3. Select the **Show weighted data** option.

   The report is updated and the weighted data is displayed.

You can save the weighted and unweighted versions of the report under different names. To do this, display the data as required (weighted or unweighted), click the down-arrow beside the **Save** button, select **Save As** and give the report a suitable name.

23.1.3. Saving a Report and Creating a New Report

The Responses and the Verbatims pages contain a report selection field, and buttons allowing you to save the current report under a new name and also create a new report.

Note that if you save the report under a new name, all you are doing is changing the name of the report. The data displayed, the layout and the access permissions for the report will remain as set.

Using the filter (see The Filter Area on page 691 for more information) you can select the data you wish to be presented (for example, completed interviews that were started between certain dates), then click **New Report** to save the report with that data as a separate report. The new report will then be listed in the Report Selector field, and can be viewed, printed and exported as required. You can set access permissions for that report. Note that the data presented will be updated while the survey is live.

23.1.4. Additional Functionality

Several of the tabs have additional functionality; for example you can print out or export data from the Responses and Verbatims tabs, create banners in the Responses tab and select columns to be displayed in the Verbatims tab.

23.1.4.1. Print

You can print out the result tables and charts from Rapid Reports.

1. Scroll through the report and check the **Mark for follow-up** checkbox for those questions for which you wish to print to results.
2. In the Rapid Results menu bar, click **Print**.

   The Export Report window opens.

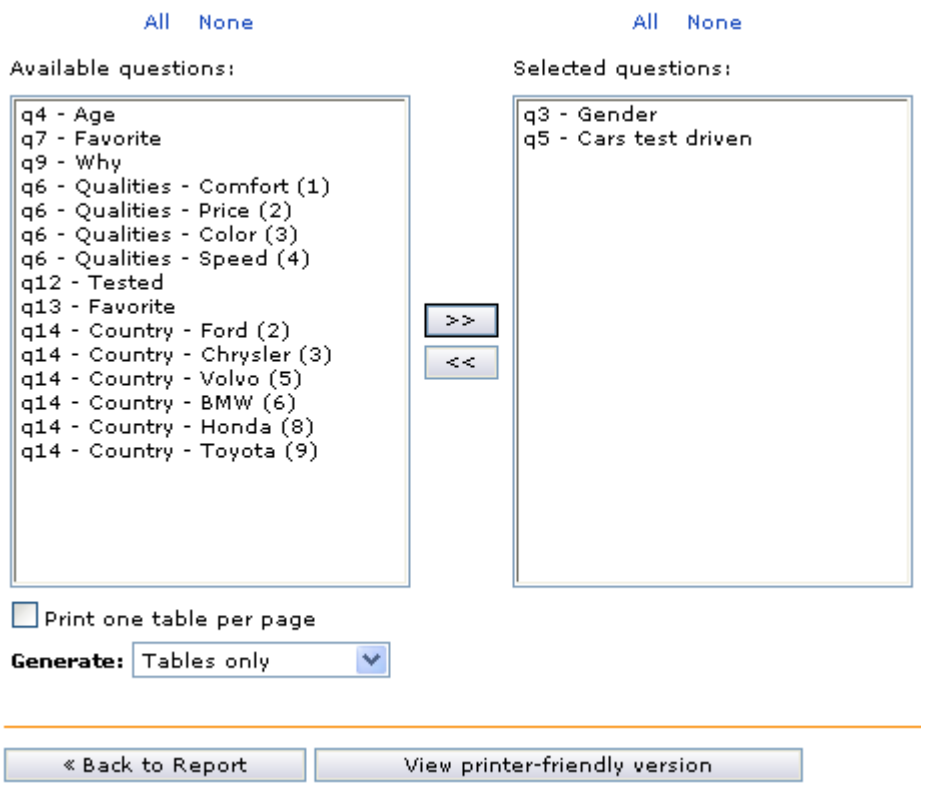


Figure 756 The Export Report (Print) window

Note: Rapid Results has a time limit when exporting. If you are exporting a large number of questions, a message may appear to inform you that the export function has timed-out and not all of the questions have been exported. If this occurs, divide the export job into smaller batches.

3. Using standard Windows techniques, select in the left column the questions for which you wish to print out the results.
4. Click the **>>** button to move the selected result sets to the right column.

   If you move a result set to the right column in error, select it and click the **<<** button to return it to the left column.

   In each column, click **All** to select all the questions, **None** to deselect all.

Note: The result sets will be printed out in the order in which they are moved into the right column.

5. Check the **Print one table per page** box if you want to have each table printed onto a separate page.

   You can print out only the result tables, only the charts, or both the tables and the charts.
6. Click the drop-down arrow beside the Generate field to open a list of the options available, and select the desired option.
7. Click **View printer-friendly version** to open a print preview window displaying the results as they will be printed.
8. Click **Print this page** or press the **Ctrl+P** keys on your keyboard to open a standard Print dialog box.
9. Make the appropriate selections, then click **Print** to send the page to the selected printer.
10. Click **Back to report** to close the Export Report window and return to the report.

23.1.4.2. Exporting the Data

As a Professional User you can export the raw data from the Report Overview tab (see The Report Overview Tab on page 674 for more information). Note that end users access this option from the list of reports in the End User Portal. To export the raw data:

1. On the Report Overview tab, click the **Data Export** button towards the right end of the Responses bar.

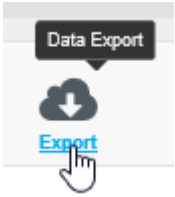


Figure 757 The Data Export button

The Export survey data overlay opens.

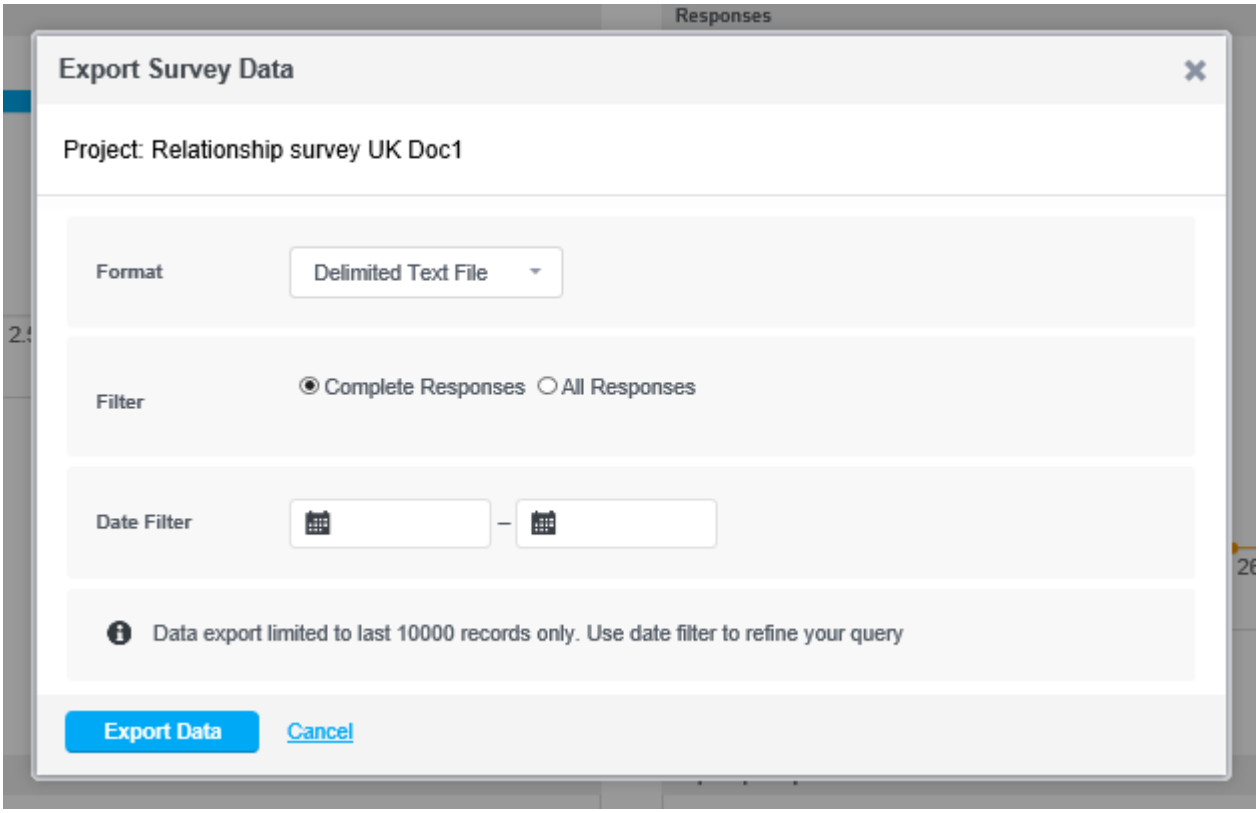


Figure 758 The Export survey data overlay

2. Select the format for the export file, decide whether you want all responses or only complete, and select the "from" and "to" dates.
3. Click **Export Data** to run the task.
4. Once the export file is ready, click **Download the file** to show a standard "Do you want to open or save..." message box towards the lower edge or your display; select as required.

You can also export the processed data from the Responses and Verbatims tabs. Currently you can select to export to Excel. On selection of the format, a "Do you want to open or save..." message box appears towards the lower edge or your display. Select **Open** or one of the **Save...** options as required.

23.1.5. Instant Analytics End Users

Note: This functionality has special license requirements. Contact your Confirmit Account Manager for further details.

Confirmit designers may have clients (end users) who also need access to Instant Analytics reports. The End Users Reporting functionality gives designers the ability to give end users who are listed in an end user list, access to these reports. An end user can then view the report by entering his credentials. Note that permissions are allocated at the survey level.

To give end users access to an IA report:

1. Open the survey you wish to work with.
2. Ensure the survey has an end user list (see Administration of End Users on page 763 for more information), and has been launched.
3. Go to the **Survey Management > End Users Reporting** menu command.

   The End User Reporting page opens.

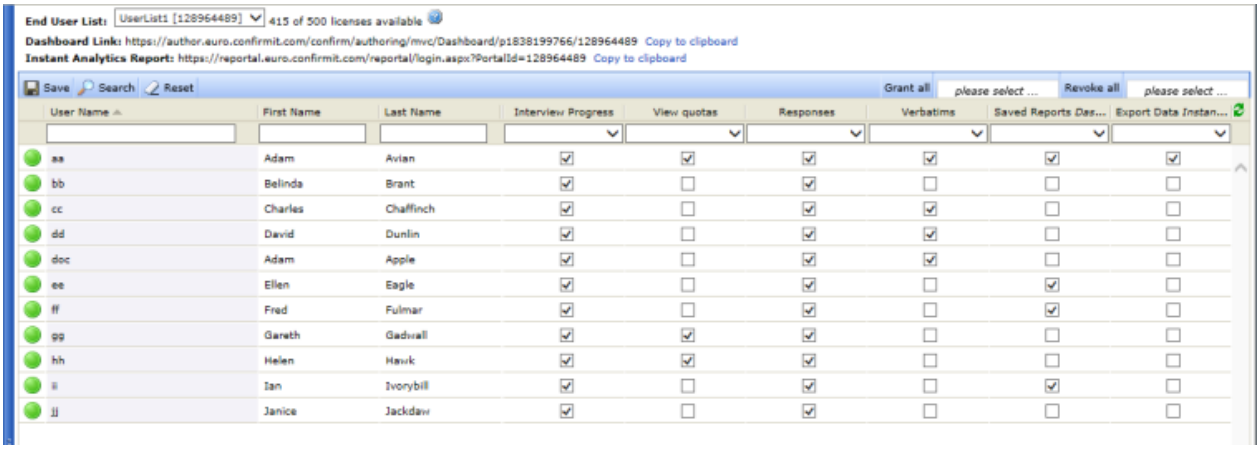


Figure 759 Example of allocating end user access permissions for a survey

4. In the End User List drop-down, select the end user list that is to be used for this survey.

   The users in that list will then be listed in the page, and you can allocate permissions as required. Note that end users that are allocated one or more reports will be indicated with a green icon in the left column.

- Use the searchable headers to filter the list of users and assign appropriate permissions to the end users. When an end user is allocated permission to one or more of the reporting components (Interview Progress, Quotas, Responses, Verbatims, Saved Reports or Export Data IA) this user will utilize one end user survey reporting license. A summary of the available licenses is displayed. The same end user list can be assigned to several surveys.
- You can grant or revoke all permissions or selected permissions simultaneously for all currently listed end users. End users that are filtered out of the list for any reason will not be affected. Click in the Grant all or Revoke all fields as appropriate to open a drop-down, select the desired permission(s), and click the **Grant/Revoke** button.

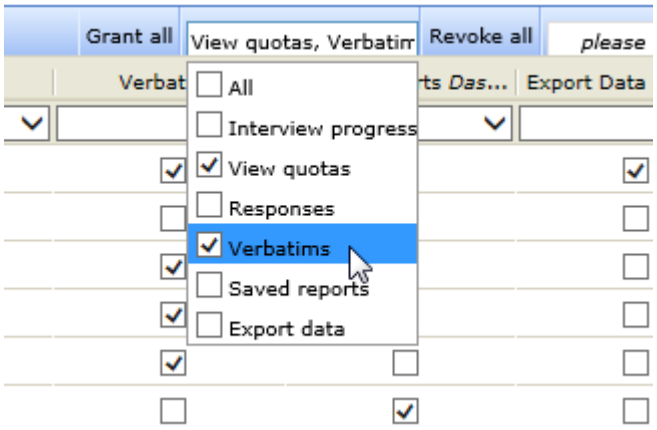


Figure 760 Selecting permissions to grant to all end users

Note: Only one end user list can be selected for a survey at any one time. If you change the end user list that is selected for a survey, then any IA access permissions that were allocated to the end users in the original list will be revoked and those end users will no longer have access to the IA report.

5. On completion, click **Save** to save the changes.

A link to the Instant Analytics report is provided above the user list, and you can copy this to the clipboard for ease of access. You give an end user access to the report as follows:

1. Click the **Copy to Clipboard** link towards the right end of the Instant Analytics Report URL.
2. Paste the URL into an email and send it to the appropriate end user.

   The end user must merely copy the URL into a browser to access the report.

23.2. The Survey Dashboard

The Survey Dashboard provides information about a survey to users and selected end users without them having to log in to Authoring. Some statistics can be accessed through a touch device or through a standalone browser.

Once the survey is launched, the URL to access a Survey dashboard is available on the **Survey Management > Overview** page General tab (see The General Tab on page 174 for more information). Note that the information presented in the dashboard is taken only from the Production database.

Copy the dashboard link into a browser and log in (see The Dashboard Login on page 698 for more information). You can access the URL using an iPhone, Android or Blackberry device.

Note: For security reasons the survey dashboard login cannot be placed in a frame in a web page.

On completion, click **Log off** to log off and close the dashboard.

23.2.1. The Dashboard Login

Log in to the dashboard using your Confirmit username and password. You can access the URL using an iPhone, Android or Blackberry device.



Figure 761 The Dashboard Login page

- **Dashboard ID input field** - this field can be optionally supplied, or is automatically pre-populated when using the link from inside of the dashboard end user management functionality. The Dashboard ID refers to the end user list ID that the user will be authenticated against (see Administration of End Users on page 763 for more information). If no dashboard ID is supplied, it is assumed that a full professional (normal, standard) user is being authenticated against.
- Check the **Stay Logged In** checkbox to remain logged in for the specified time (default is 48 hours), even if the browser window is closed and reopened.
- "Forgotten password" functionality is available if required (see Forgotten Password on page 18 for more information).

After you have logged in, the Recent Surveys list is displayed (see The Survey List on page 699 for more information).

23.2.2. The Survey List

When you have logged in, the Recent Surveys list is displayed. This is the same list as is on the Authoring **Home > Recent** drop-down, and it is presented with the "last accessed" survey at the top of the list. Note that this will only include surveys and Basic Panels; not Professional Panels.

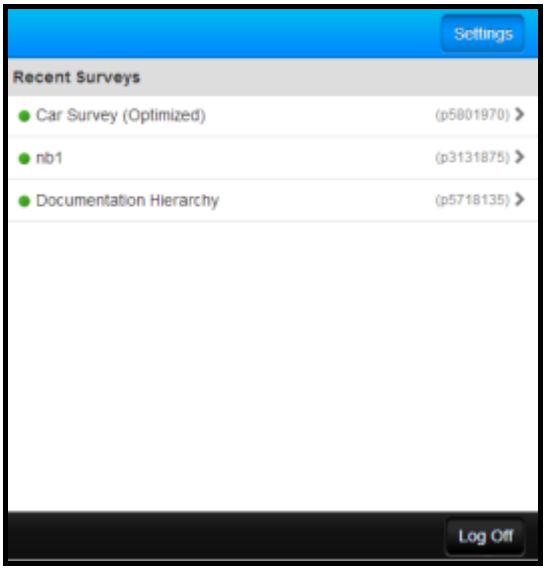


Figure 762 Example of a Recent Surveys list in the dashboard

- A colored icon beside the survey name indicates the current status of the survey; Red indicates the survey is closed, Green indicates it is open.
- Click on **Settings** to open the Dashboard Settings page. This page allows you to change your password and select the preferred survey language to be used for quotas and report pages (see The Dashboard Settings on page 702 for more information).
- Click on a survey in the list to display statistics for the survey. Note that if the survey database has not yet been created, then a message will be displayed informing you of this fact.

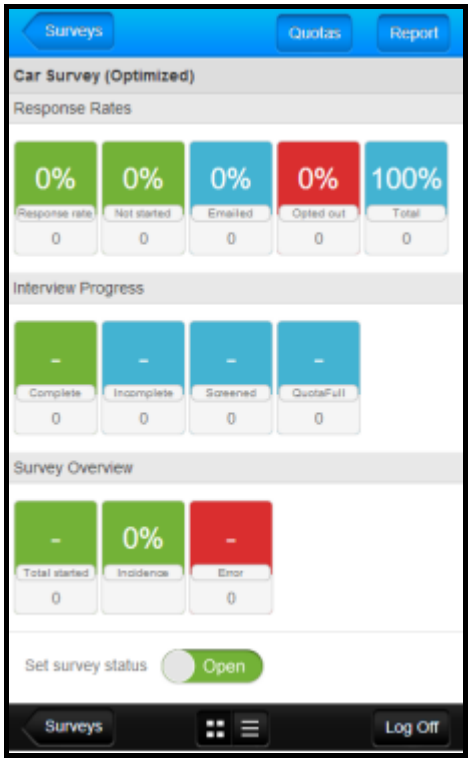


Figure 763 Example of the statistics displayed for a survey in the dashboard

- The two buttons in the middle of the lower toolbar toggle between tile view (as in the illustration above - default) and list view. The same information is presented in both cases, just in a different format. The selected state is remembered via a cookie so that the next time the user logs on to the dashboard it will open in that state.
- When viewing a survey's statistics, click on the **Surveys** links at the top or bottom of the page to return to the Recent Surveys page.
- Users with the appropriate permission can open or close the survey by clicking the Set Survey Status button. The button is named and color-coded accordingly.
- If the survey contains quotas, the **Quotas** button is accessible in the upper toolbar. Click this to open the Quotas page. This provides read-only access to the quotas in the survey. A drop-down list of the quotas in the survey allows you to select the quota you wish to view. All columns that appear in Authoring appear in the dashboard, including when optimistic quotas are enabled.

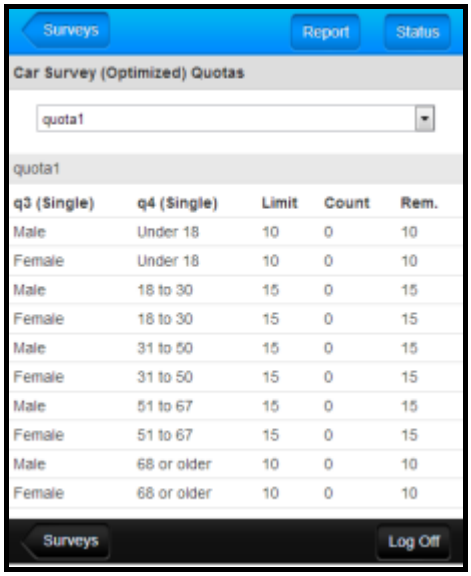


Figure 764 Example of the Quotas page for the survey in the dashboard

- Click **Status** to return to the Survey Status page, or **Surveys** to go to the Recent Surveys list.To update the data presented, return to the Recent Surveys list then re-select the survey.
- Click **Report** to view a reduced-functionality Rapid Results style report page. Here you can select the question you wish to view the data for, and select the desired status filter.
- Click **Log off** to log off and close the dashboard.

23.2.3. The Dashboard Settings

In the dashboard, click on **Settings** to open the Dashboard Settings page.

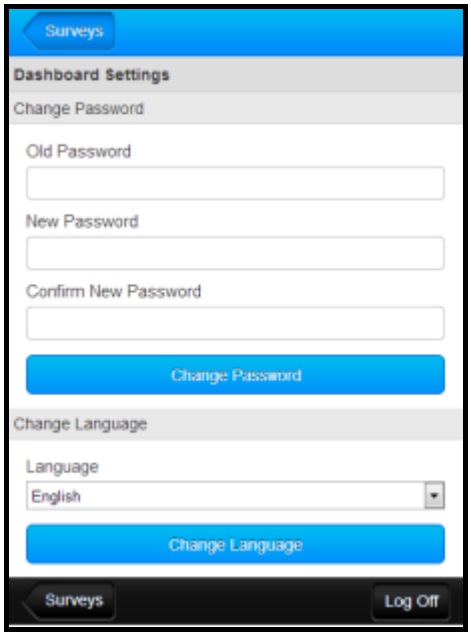


Figure 765 The Survey Dashboard Settings page

Here you can change your password and select the language you wish to use for the quotas and report pages. For the language, end users will update their user language in the database, while Professional users will store the selected language only in a persistent cookie.

23.2.4. Dashboard End Users

Note: This functionality has special license requirements. Contact your Confirmit Account Manager for further details.

Confirmit designers may have clients (end users) who also need access to a survey dashboard. The End Users Reporting functionality gives designers the ability to give end users who are listed in an end user list, access to different parts of a survey dashboard. An end user can then log into the dashboard by entering his credentials along with the end user list ID (dashboard ID). Note that permissions are allocated at the survey level.

To set up a dashboard for end users:

1. Open the survey you wish to work with.
2. Ensure the survey has an end user list (see Administration of End Users on page 763 for more information), and has been launched.
3. Go to the **Survey Management > End Users Reporting** menu command.

   The End User Reporting page opens.
4. In the End User List drop-down, select the end user list that is to be used for this survey.

   The users in that list will then be listed in the page, and you can allocate permissions as required.

   Use the searchable headers to filter the list of users and assign appropriate permissions to the end users. When an end user is allocated permission to one or more of the reporting components (Interview Progress, Quotas, Responses, Saved Reports or Export Data) this user will utilize one end user survey reporting license. A summary of the available licenses is displayed. The same end user list can be assigned to several surveys.

Note: Only one end user list can be selected for a survey at any one time. If you change the end user list that is selected for a survey, then any dashboard permissions that were allocated to the end users in the original list will be revoked and those end users will no longer have access to the dashboard.

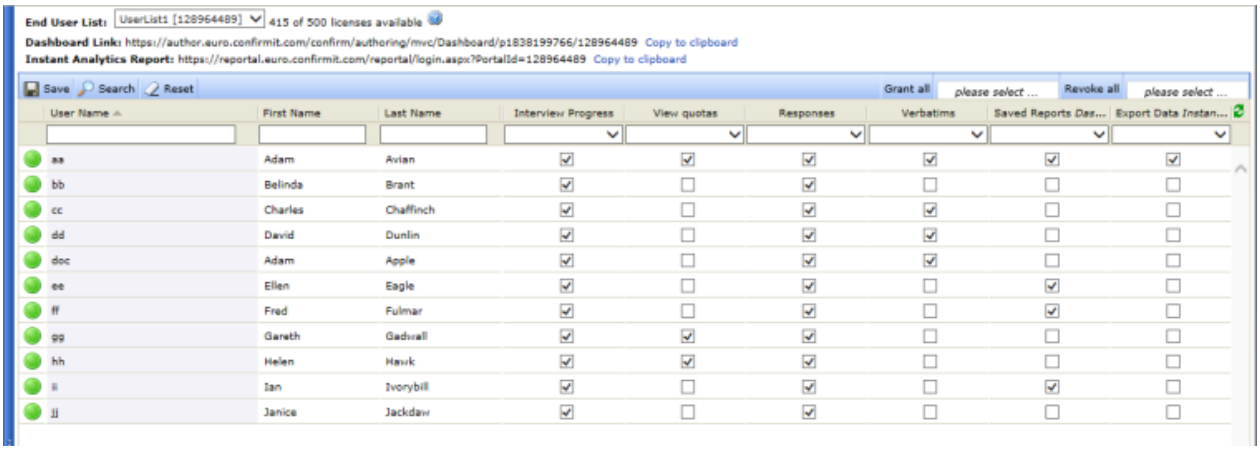


Figure 766 Example of an end user permissions list for a survey

5. On completion, click **Save** to save the changes.

A link to the survey dashboard is provided above the user list, and you can copy this to the clipboard for ease of access. You give an end user access to the dashboard as follows:

1. Click the **Copy to Clipboard** link towards the right end of the Dashboard Link URL.
2. Paste the URL into an email and send it to the appropriate end user.

   The end user must copy the URL into a browser to access the Dashboard Login page, then log in using his/her UserID and password.

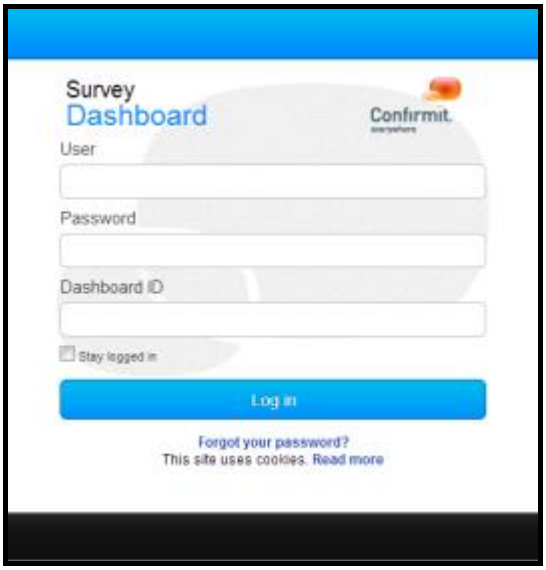


Figure 767 The Dashboard Login page

   The end user will then have access to the same dashboard information that is available to the user, except that it will be restricted by the permissions allocated.

The Dashboard ID field contains the ID of the dashboard the end user has access to. If this field is blank, the end user is assumed to be a full Authoring Professional (normal, standard) user and the User and Password will be checked against the company's license details.

An end user can be allocated access to multiple survey dashboards. The end user can then select which survey dashboard he/she wishes to view.

If the end user forgets their password, they can click the link below the log in fields to be sent instructions for resetting the password.

23.3. The Reporting Menu

This chapter describes the functionality under the Reporting menu command. The menu is as shown below.

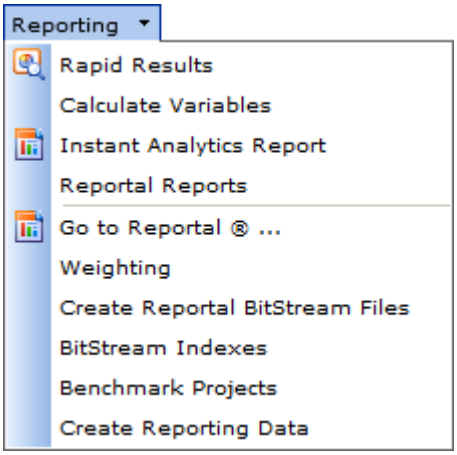


Figure 768 The Reporting menu

The commands are as follows:

- **Rapid Results** - opens the Rapid Results functionality (see Rapid Results on page 706 for more information).
- **Calculate Variables -** the values in recoded variables are not updated automatically as response data is added to the questionnaire; you must calculate and update the values "manually" but clicking this option (see Recalculating the Variables on page 755 for more information).
- **Instant Analytics Reports -** opens the Instant Analytics report for the survey (if one has been created) (see Instant Analytics on page 673 for more information).
- **Reportal Reports -** opens a page listing all the Reportal reports that are associated with the current survey (see Reportal Reports on page 723 for more information). Click on a blue Report Name link to start Reportal and open the report. Note that the report will open in the mode applicable to the permission you have for that report. You can create new reports using the Report Wizard functionality if a wizard is available to you (see The Report Wizard on page 724 for more information).
- **Go to Reportal** - opens Confirmit Reportal in a new window. Refer to the Reportal User Guide for further information.
- **Weighting** - opens the Weight Model list (see Weighting on page 726 for more information).
- **Create Reportal BitStream Files** - BitStream Files are a way of storing survey data in compact files. These files are optimized for fast access, to allow aggregated tables to be generated as quickly as possible for your Reportal Report. Go to this menu command to create the BitStream Files for your survey (see BitStream Files on page 735 for more information).
- **BitStream Indexes** - index the BitStream Files for improved performance (see BitStream Indexes on page 739 for more information).
- **Benchmark Projects** - the Benchmark functionality in Reportal gives you the ability to combine the aggregated results from the survey with other results or numbers in the same tables, and consequently also build charts where the survey results calculated in Reportal are compared with these uploaded numbers. A Benchmark survey must be set up in Authoring. Go to this menu command to set up the survey. For further information, refer to the Confirmit Reportal User Guide.

- **Create Reporting Data -** if you are reporting on one survey, you can use Reporting Data instead of BitStream files. This uses the same database and analytics engine as SmartHub, but without having to configure a hub just for one source. Select this menu option to have the data set up automatically in a simple hub ready for reporting (see Create Reporting Data on page 740 for more information).

23.3.1. Rapid Results

Rapid Results is an analysis and reporting application created to enable you to check your result data quickly and easily. Rapid Results displays the questions in the selected survey, along with the results for each question, in one simple list. The functionality allows you to take the results of a survey and make basic adjustments to the result tables and charts. You can then copy selected results to Excel or Reportal for final editing of the presentation, or print them out.

Note: Rapid Results has a display limit of 1000 questions (note also that each row in a Grid question counts as a separate question). If a survey contains more than 1000 questions, only the first 1000 will be displayed. If you wish to include more than 1000 questions in your report, then you must use Reportal. You can filter out unwanted questions using the Question Filter functionality (see The Question Filter on page 712 for more information).

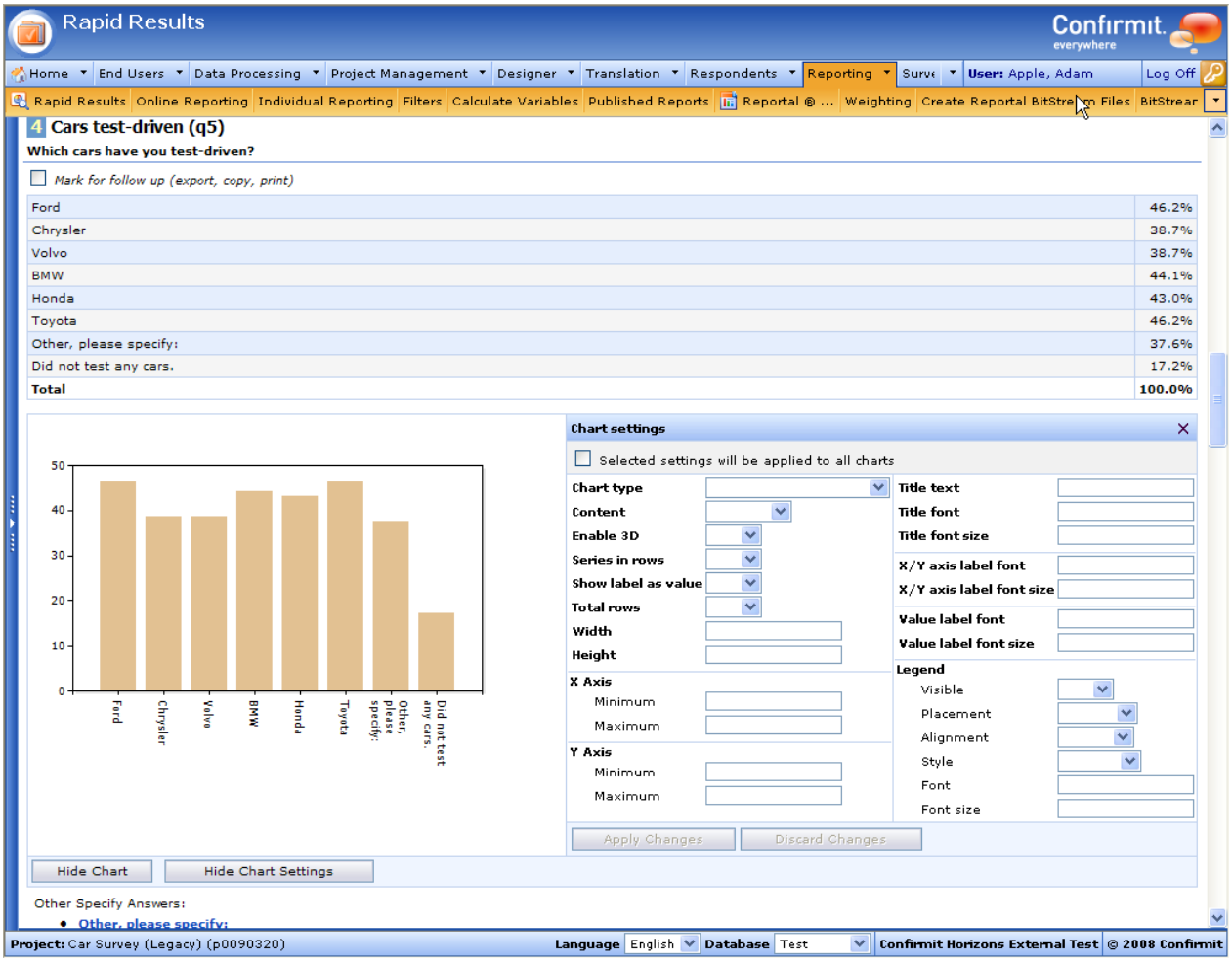


Figure 769 Example of the Rapid Results window layout

When you select Rapid Results, only the first 10 result tables are initially generated and displayed. As you scroll or jump down to questions lower in the list, the results of those questions are then generated. This enables Confirmit to start presenting the results much sooner as the system does not have to wait until all the results have been processed before starting the presentation. While a result table is being generated, the message “Not yet generated” is displayed where the results will shortly appear. Charts of the results are displayed if you click the **Show Chart** button for the specific question.

A set of options is provided that allows you to adjust the layout of the information displayed. In addition, you can make adjustments to the layout of each chart individually, or to all charts simultaneously.

Note: If the question presented is an open-text numeric, then the user will see just the average of the answers, not the individual answers.

Note: Rapid Results is not intended to provide comprehensive report creation and editing functionality. For additional in-depth report editing functionality, use Reportal.

Note: When you click the View Responses link for an Open Text questions in Rapid Results, only the first 1000 replies are displayed. If you need to view more than 1000 replies for an Open Text question, then you must use Reportal.

23.3.1.1. Preconditions

Before you can start to use Rapid Results, the following conditions must be met:

- The survey must contain at least one question, the survey must have been launched and a database must exist.
- Rapid Results can be used on both test and production data. At least one set of results to the survey must be available (random data can also be used).

23.3.1.2. Accessing Rapid Results

1. Go to the **Reporting > Rapid Results** menu command.

   The Rapid Results page opens, listing the first 10 questions and result sets.

23.3.1.3. The Rapid Results Menu Bar

Rapid Results has its own menu bar, see the figure below.



Figure 770 The Rapid Results menu bar

The menu options are described in the following sections. Note that only relevant options will be available.

23.3.1.3.1. Edit Banner

A banner is a collection of segments where each segment makes up a column in the results tables. When you select "Run report with this banner", the current banner (segments) will be applied to all tables.

A restriction is the same as a column filter or grouping.

How to Create the Banner

1. In the blue **Rapid Results** menu, click **Edit Banner**.

   The Edit banner window opens as shown below.

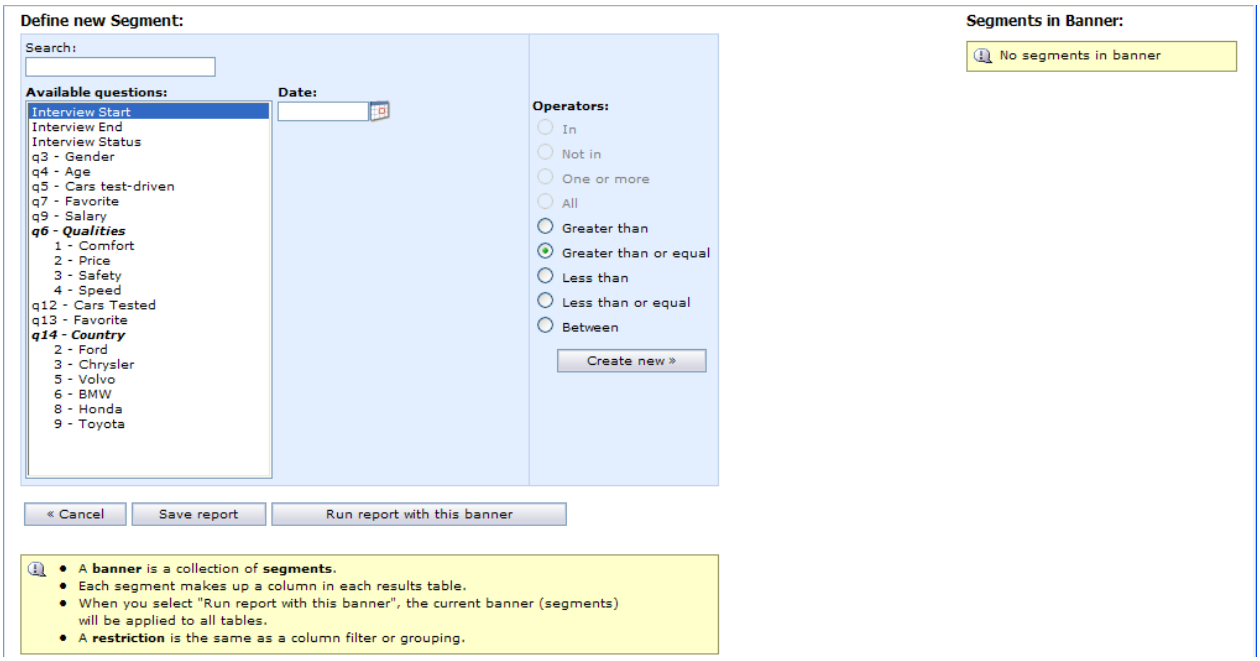


Figure 771 The Edit Banner window

2. In the left column, select the question you wish to use as the first segment in the banner.

   A new column appears in the center of the window, the contents of which will depend on the question selected. At the same time, the filter operators in the list above the **Create New** button will activate as appropriate to the selected question.

   The figure below shows an example of the window with a question selected and the answer options for that question displayed in the central column. Note that the active filter operators (ringed) have changed to those appropriate to the question (in this case Age), and a brief description of the selected operation is displayed below the filter operators towards the lower right corner of the window (arrowed). In the case shown below, as All is currently selected, the banner will have five segments (columns), one for each answer option.

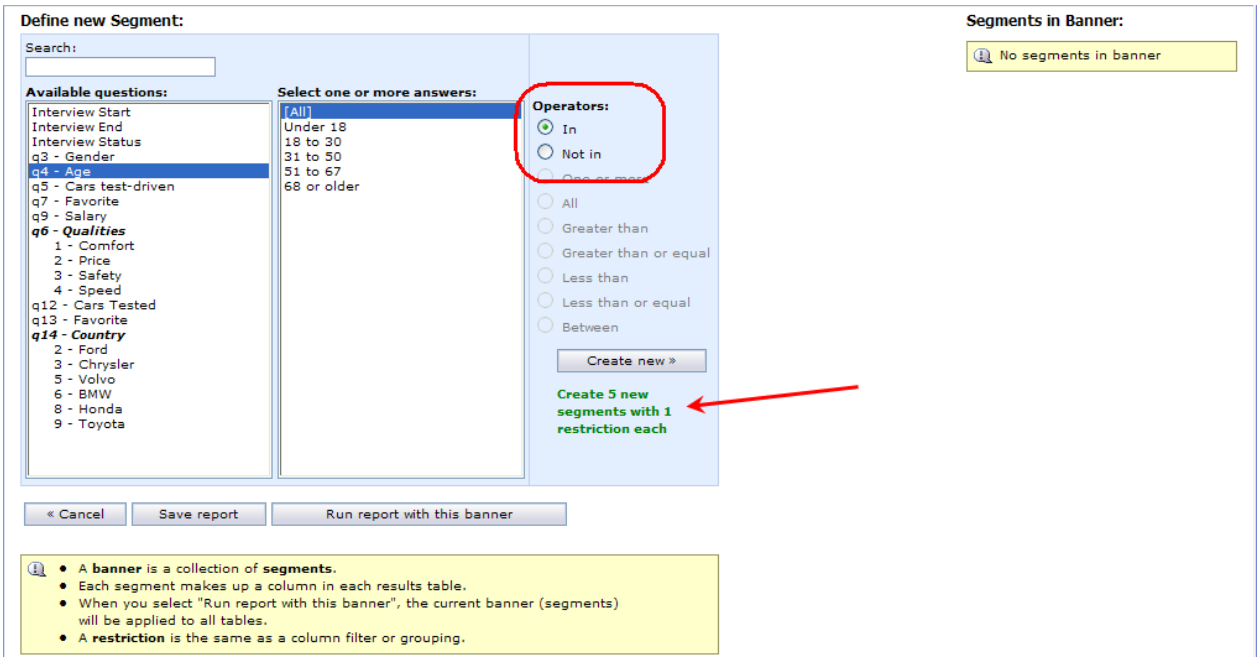


Figure 772 Example of banner editing process

3. In the central column, using standard Windows techniques, select the answer option(s) required in the banner, and select the appropriate filter operator (see The Filter Operators on page 712 for more information)

4. Click **Create New** to add the selected segments to the banner.

Note: You can add as many segments as you wish to the banner. However as more segments are added, you risk the resulting table becoming unwieldy.

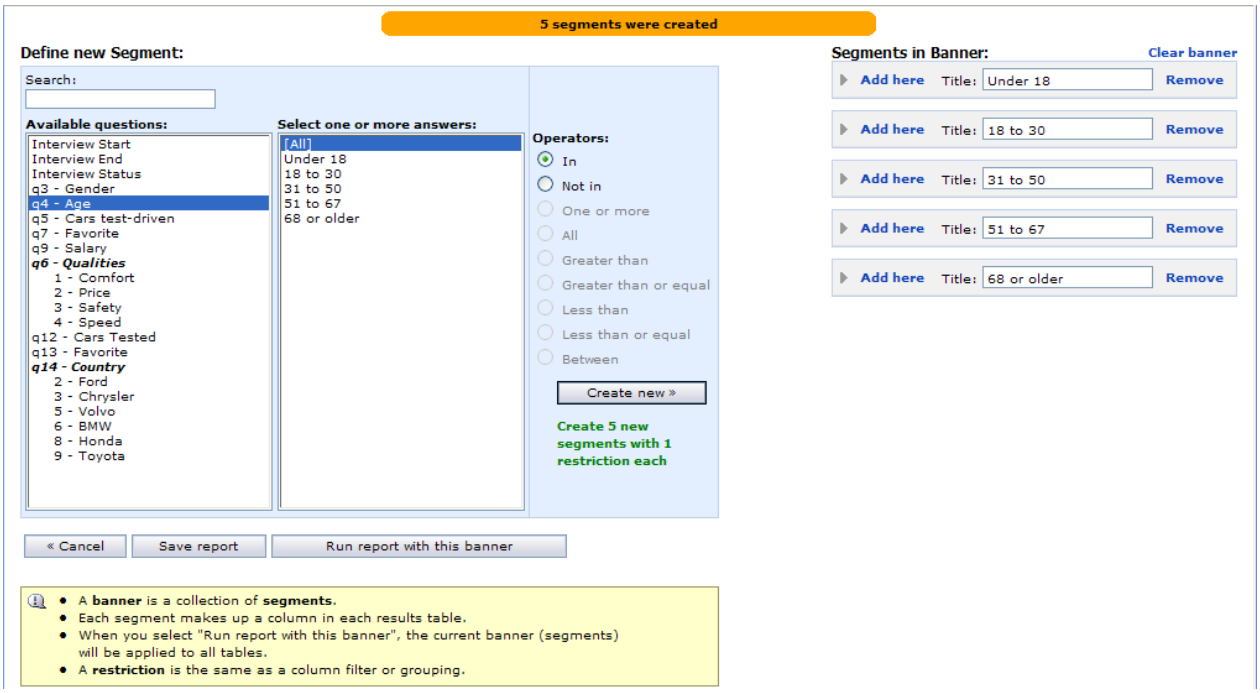


Figure 773 Example of a simple banner under creation

5. To remove an unwanted segment from the banner, click **Remove** for that segment.

   In the figure shown below, the “Under 18”, “51-67” and “68 or older” segments have been removed.

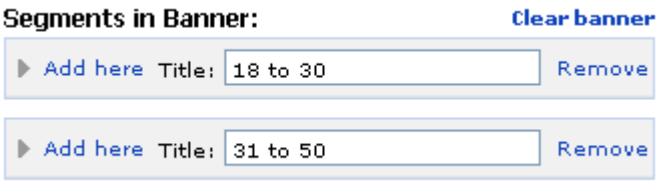


Figure 774 The remaining banner segments

   To remove all the segments from the banner in one operation, click **Clear Banner**.

   Rapid Results allows you to create complex columns for the result tables, where you can combine restrictions based on two or more questions in one column. To achieve this, you can add qualifiers to individual segments as required.

6. Select the question and answer options to be used as the additional qualifier to an existing segment, as stated in points 2 and 3 of this procedure.
7. In the Segments in Banner column, click **Add here** (see figure below) for a particular segment to include the qualifier in that segment.

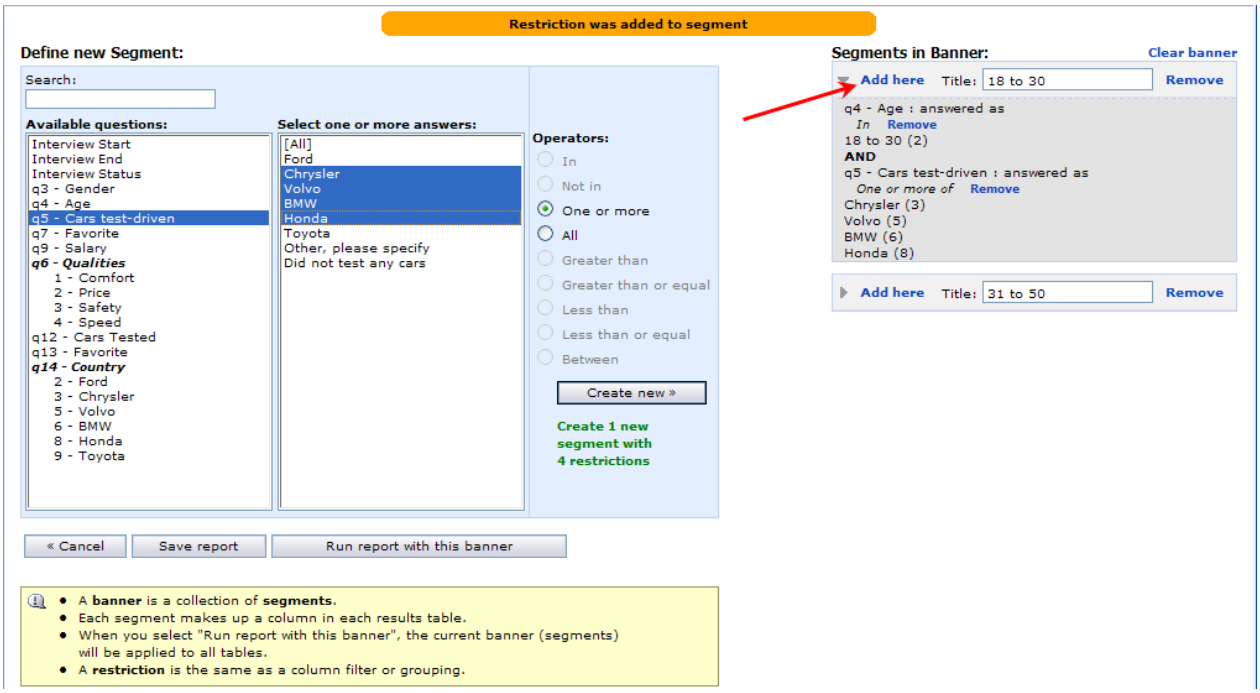


Figure 775 Adding additional qualifiers to a segment

The Details pane for the segment opens. The example below shows a segment to display the number of respondents in the 18 to 30 age-group who have tested one or more of the selected group of cars.



Figure 776 Example of the details pane for a segment with additional qualifier

You can change the title of the segment to reflect the updated contents.

8. Click in the Title field and edit the title as necessary.
9. When you have the required segments in the banner, click **Run report with this banner** to apply the banner to the report so you can view the results.

Note: If you create a new banner, or make changes to an existing banner, these changes will not be saved automatically. If you wish to keep the banner for later use then you must save it. Note also that you can edit the banner at any time.

The Filter Operators

The third column of the Edit banner window contains a number of filter operators. These will become active as appropriate depending on the type of question that is selected, and are as follows:

- **In** – active for single punch questions. Rapid Results will show all responses where the respondent has chosen this option..
- **Not in** – active for single punch questions. Rapid Results will show all responses where the respondent has not chosen this option.
- **One or more** – active for multi-punch questions. Select one or more of the available options, then Rapid Results will show the responses for instances where one or more of the selected options have been chosen.
- **All** – active for multi-punch questions. Select one or more of the available options, then Rapid Results will show the responses for instances where all of the selected options have been chosen.
- **Greater than** – active when date information (such as Interview Start/End) or open numeric questions are selected. Select if you want results greater than the selected value. For example, dates after the specified date.
- **Greater than or equal** – active when date information (such as Interview Start/End) or open numeric questions are selected. Select if you want results greater than or equal to the specified value.
- **Less than** – active when date information (such as Interview End) or open numeric questions are selected. Select if you want results less than the selected value.
- **Less than or equal** – active when date information (such as Interview End) or open numeric questions are selected. Select if you want results less than or equal to the specified value.
- **Between** – active when date information (such as Interview Start/End) or open numeric questions are selected. Select if you want results between two selected values. A second data field appears when this operator is selected.

23.3.1.3.2. The Question Filter

Use the Question Filter to filter out of the report any questions that you do not wish to be included. This can be useful if some questions are simply not required, or if for example you have a large number of questions (more than 1000) in your questionnaire and you wish to include some in the report that would otherwise not be included due to the display limit. You can then filter out some less important questions such that those you need come within the 1000 limit.

1. In the Rapid Results toolbar, click the **Question Filter** button.

   The Question Filter page opens.

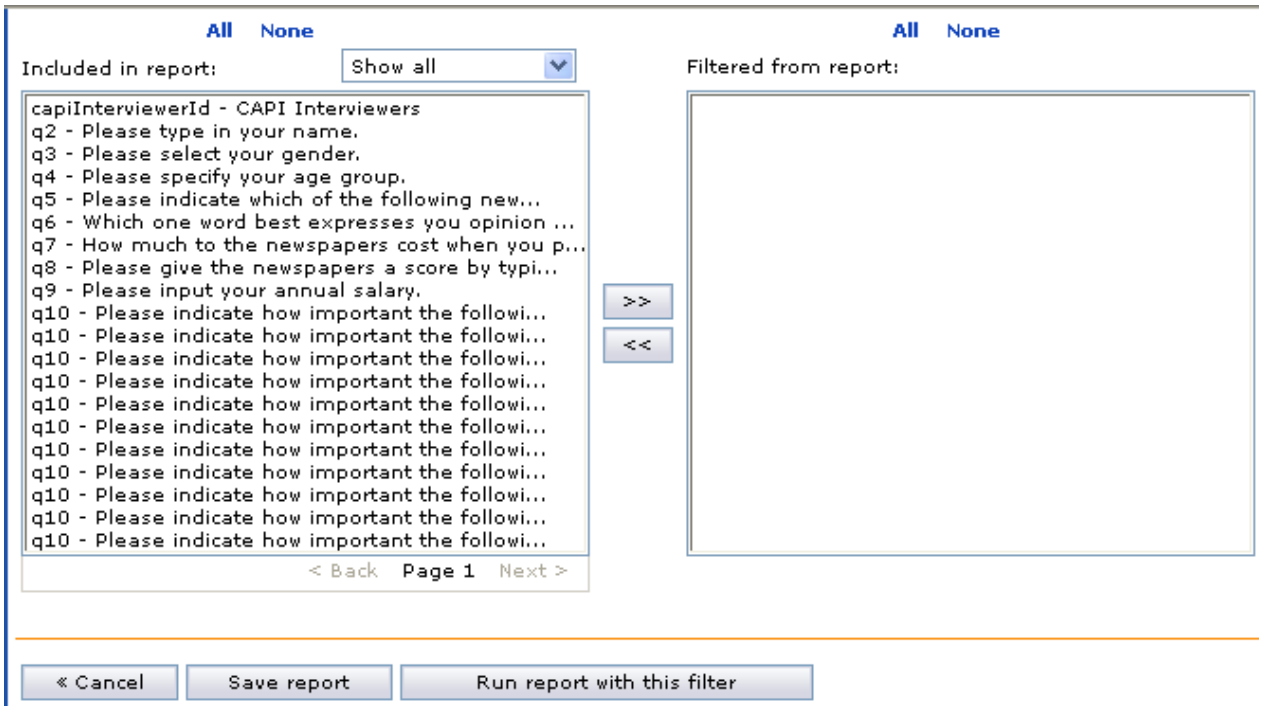


Figure 777 Example of the Question Filter page

The left column lists all the questions in the report. The right column lists any questions that are to be filtered out. To select the questions that are to be removed from the report:

2. In the left column, using standard Windows techniques select the questions you wish to filter out of the report.
3. Click the **>>** button to move the selected questions to the Filtered Out column.

   You can now save the report under the same name with the selected questions removed, save it under a new name, or run the report.

   If you select **Run Report…** then the filter page closes and you return to the Rapid Results main page, and the selected questions are no longer included in the report.

23.3.1.3.3. How to Save a Report

When you have made changes to the report layout and settings, you may want to save them.

1. Click **Save**.

   If the report has been saved previously, clicking **Save** will merely re-save the report, overwriting the previous version. If the report has not been saved before, the Save New Report window opens. If so:

2. Type a name for the report into the Name field.
3. To simplify later searches, type a description of the report into the description field.
4. Click **Save Report**.

   The report is saved.

Note: Once the report has been saved, the Save Report As and Delete Report buttons become available.

To save the report under a different name as a new/additional report, click **Save Report As**. The Save New Report window opens. Proceed as from step 2 above.

23.3.1.3.4. How to Delete a Report

Once you have saved a report, the **Delete Report** button becomes available. To delete a report:

1. In the Report field, select the report you wish to delete.
2. Click **Delete Report**.

   A confirmation box appears asking you to confirm the deletion.

3. Click **OK** to confirm the deletion, **Cancel** to halt the process.

Note: Once you confirm a deletion operation you cannot reverse, cancel or undo the process – the report will be permanently deleted.

23.3.1.3.5. How to Send to Excel

Confirmit can export the results of your survey to Excel.

Note: Microsoft Excel 2003 is required to view exports from Rapid Results.

1. Scroll through the report and check the **Mark for follow-up** checkbox for those questions that you wish to export to Excel.



Figure 778 The Mark for follow up checkbox

2. In the Rapid Results menu bar, click **Send to Excel**.

   The Send to Excel window opens.

Note: You can click the button before you have selected the questions, and select them in the Send to Excel window.

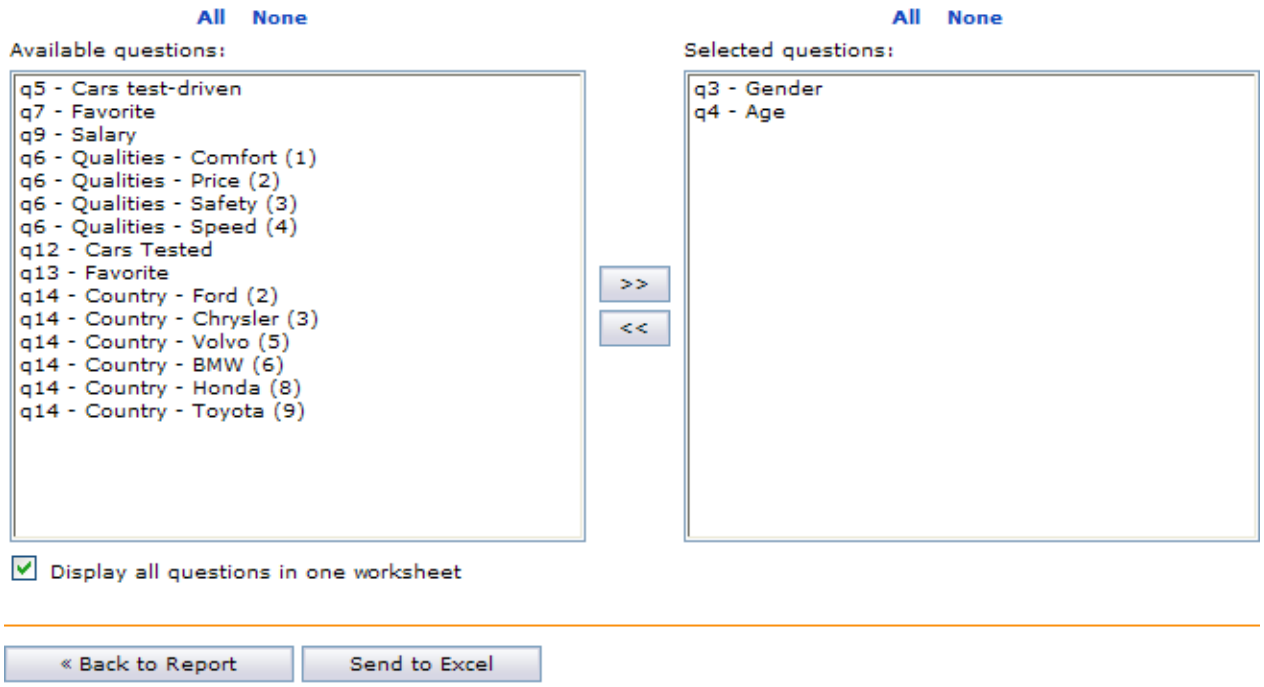


Figure 779 The Send to Excel window

The questions in the survey are listed in the Available Questions column, while any questions already selected by checking the **Mark for followup** boxes will be moved to the Selected Questions column. You can now edit your selection.

Note: Rapid Results has a time limit when exporting. If you must export a large number of questions, a message may appear to inform you that the export function has timed-out and not all of the questions have been exported. If this occurs, divide the export job into smaller batches.

3. Using standard Windows techniques, select in the left column any additional questions for which you wish to export the results.
4. Click the **>>** button to move the selected result sets to the right column.

   If you move a result set to the right column in error, select it and click the **<<** button to return it to the left column.

   In each column, click **All** to select all the questions, **None** to deselect all.

Note: The result sets will be exported to Excel in the order in which they are moved into the right column.

If a value is specified in the Significance Testing field on the Report Settings page (see Report Settings on page 719 for more information), then an "Include significance testing" checkbox is displayed in the question selection page below the "Display all questions ..." checkbox. Select the "Include..." checkbox to include the significance testing data in the report.

5. Click **Send to Excel**.

   The Excel file is created and the result tables imported. On completion, the File Download dialog opens.

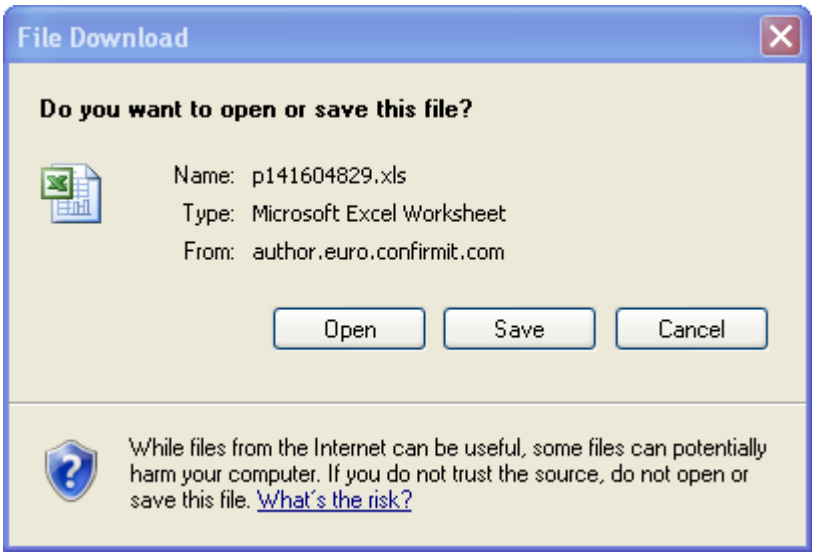


Figure 780 The Export Response Data overlay

6. Click **Open** to start Excel and view the results, or **Save** to open a standard Save As dialog box and then save the .xls file.
7. Click **Back to report** to close the Export Report window and return to the report.

23.3.1.4. Print

You can print out the result tables and charts from Rapid Reports.

1. Scroll through the report and check the **Mark for follow-up** checkbox for those questions for which you wish to print to results.
2. In the Rapid Results menu bar, click **Print**.

   The Export Report window opens.

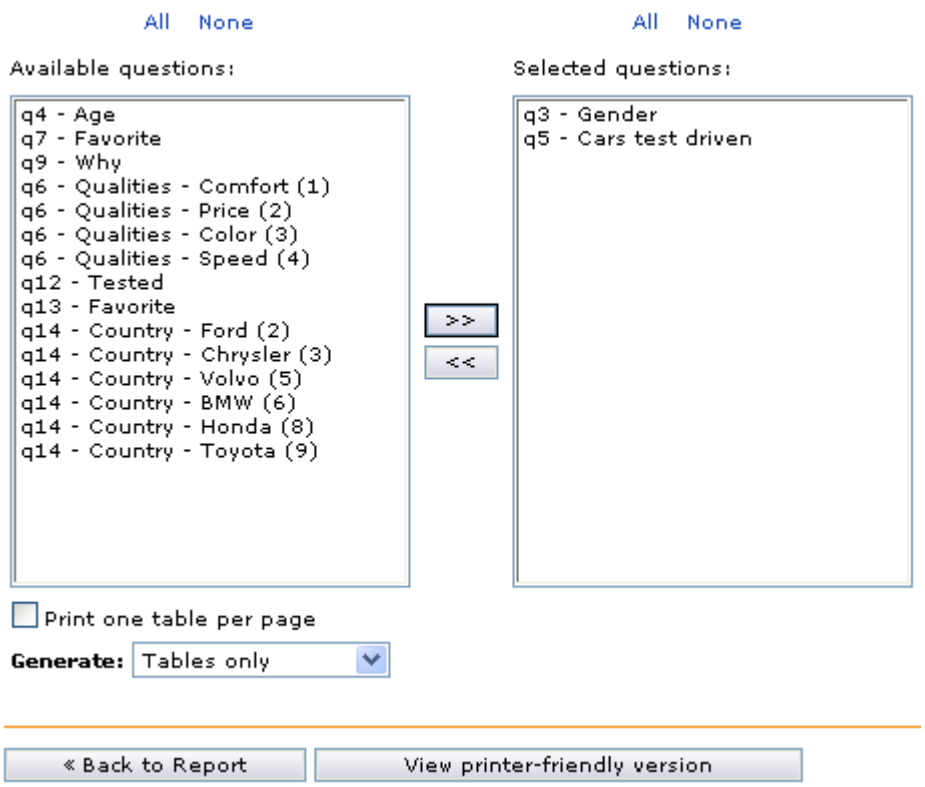


Figure 781 The Export Report (Print) window

Note: Rapid Results has a time limit when exporting. If you are exporting a large number of questions, a message may appear to inform you that the export function has timed-out and not all of the questions have been exported. If this occurs, divide the export job into smaller batches.

3. Using standard Windows techniques, select in the left column the questions for which you wish to print out the results.
4. Click the **>>** button to move the selected result sets to the right column.

   If you move a result set to the right column in error, select it and click the **<<** button to return it to the left column.

   In each column, click **All** to select all the questions, **None** to deselect all.

Note: The result sets will be printed out in the order in which they are moved into the right column.

5. Check the **Print one table per page** box if you want to have each table printed onto a separate page.

   You can print out only the result tables, only the charts, or both the tables and the charts.
6. Click the drop-down arrow beside the Generate field to open a list of the options available, and select the desired option.
7. Click **View printer-friendly version** to open a print preview window displaying the results as they will be printed.
8. Click **Print this page** or press the **Ctrl+P** keys on your keyboard to open a standard Print dialog box.
9. Make the appropriate selections, then click **Print** to send the page to the selected printer.
10. Click **Back to report** to close the Export Report window and return to the report.

23.3.1.4.1. How to Add to Reportal Report

Note: At least one Reportal report based on the survey must exist before you can copy selected tables to Reportal. If no such reports exist, the Add to Reportal Report button will be inactive. Refer to the Reportal User manual for information on creating a Reportal report.

To copy selected tables and charts to Reportal:

1. Scroll through the report and check the **Mark for follow-up** checkbox for those questions that you wish to copy to Reportal.
2. Click **Add to Reportal Report**.

   The Export Report window opens.

Note: You can click the button before you have selected the questions, and select them in the Export Report window.

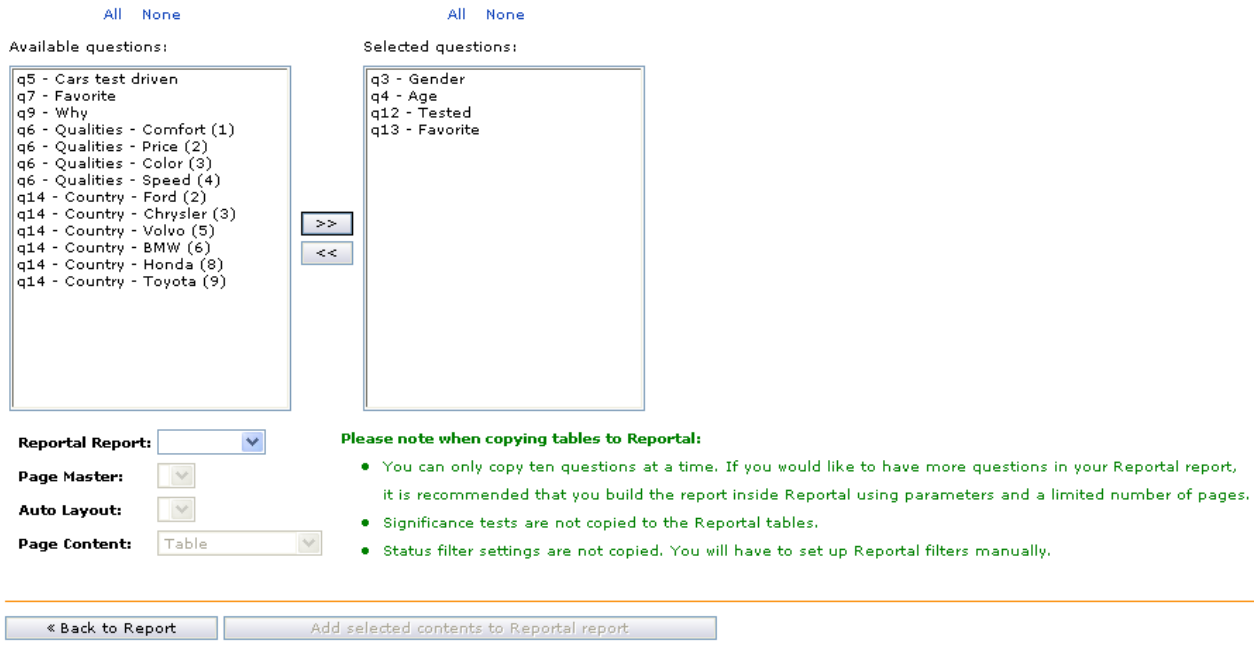


Figure 782 The Export Report window with some questions selected

Note: Rapid Results has a limit of 10 questions when exporting. If you need to export a larger number of questions you will need to divide the export job into smaller batches.

3. Using standard Windows techniques, select in the left column the questions that you wish to copy to Reportal.
4. Click the **>>** button to move the selected result sets to the right column.

   If you move a result set to the right column in error, select it and click the **<<** button to return it to the left column.

   In each column, click **All** to select all the questions, **None** to deselect all.
5. Click the drop-down arrow beside the Reportal Report data field and select the report into which you wish to copy the questions.

   Once a report is selected, the remaining data fields in the window become active.
6. Select the desired options in the remaining data fields.
7. Click **Copy selected questions**.

The questions are copied to Reportal. You can now open Reportal and set up the questions as you require for your report.

23.3.1.5. Report Settings and Navigation

Below the Rapid Results menu bar are a number of filter and selection possibilities.

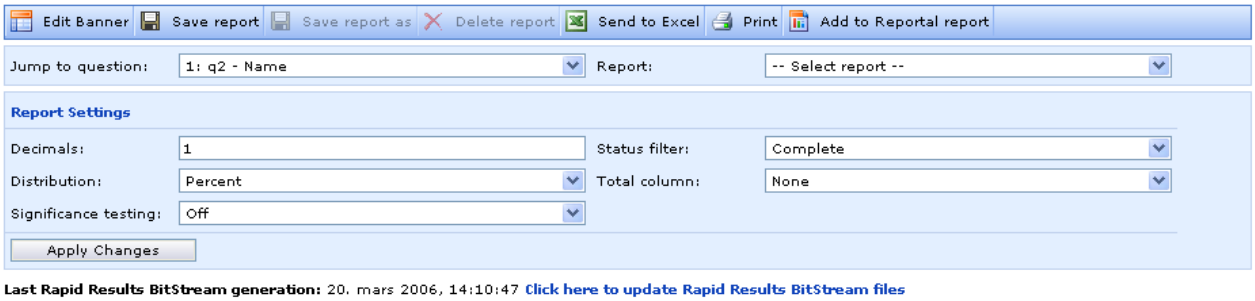


Figure 783 The report settings and navigation options

The navigation options are as follows:

- **Jump to question** – click the down arrow beside the field to open a drop-down list of all the questions in the survey, then click on the question you are interested in. Rapid Results jumps directly to the question.
- **Report** – here you can select the report you wish to display. You can choose between all the saved reports for the current survey.
- A **Back to top** link beside each question enables you to move quickly back to the top of the results list if you need to change the display parameters or move to another question.

23.3.1.5.1. Report Settings

Click **Report Settings** to toggle the report settings panel open and closed. This panel contains some general settings for specifying how the result lists are to be displayed.

Note: If the Rapid Results settings are changed, they will be stored (user-specific) after the session and will be used the next time a user enters the page.

- **Decimals** – the number of decimal places to be used when displaying numerical results (percentages and averages).
- **Distribution** – specifies how the results are to be presented.
    - **Count and Percent** – gives both the actual figure for the number of respondents choosing this answer, and that figure as a percentage of the total.
    - **Count** – gives the actual figure for the number of respondents choosing this answer.
    - **Percent** – gives the result for each option as a percentage of the total.
- **Significance testing** – will check statistical significance between the results in the columns in the aggregated table when they have independent samples. When a value is specified in this field, an "Include significance testing" checkbox is displayed in the question selection page when sending a report to Excel (see How to Send to Excel on page 714 for more information).

Note: "Statistical significance" means that the differences found in the sample(s) may be assumed to exist in the population(s) from which the probability samples are drawn. Statistical significance has nothing to do with "importance" as the term "significance" is used in normal language. For example, 95% confidence level means that there is a 5% chance that such a difference in scores could have been found purely through the effects of sampling. When a significance testing level is selected, each column in the table is given a letter that is included in the column header. Rapid Results represents statistical significance by displaying in which columns in the same row the difference is statistically significant.

- o **Off** – no confidence testing is performed on the results.
- o **Confidence level T test (%)** – Rapid Results looks for the selected level of statistical significance between the segments in the tables and indicates if found.

- **Status filter** – Rapid Results can present all the responses that have been received, or only the results pertaining to questionnaires in a specific status. Click the drop-down arrow beside the Status filter field and select the desired option.
- **Total column** – you can specify whether a Totals column is to be presented, and if so, where it is to be located. Click the drop-down arrow beside the field and select the desired location. Note that this option functions only in combination with a banner – if a banner is not used then totals will always be displayed.
- **Apply Changes** – click this button to apply the changes you have made to the parameters and refresh the data displayed.

23.3.1.6. Updating the BitStream Files

The result tables will display the data from the most recently generated BitStream files. The date and time the current BitStream files were generated are displayed below the Report Settings panel. If responses to the survey have been received after the BitStream files were last updated, then this data will not be included in the results. You are therefore recommended to update the BitStream files at regular intervals while the survey is open.

Note: BitStream files are created automatically when you enter Rapid Results for the first time in a survey.

To update the BitStream files:

1. Click **Update Rapid Results BitStream Files**.

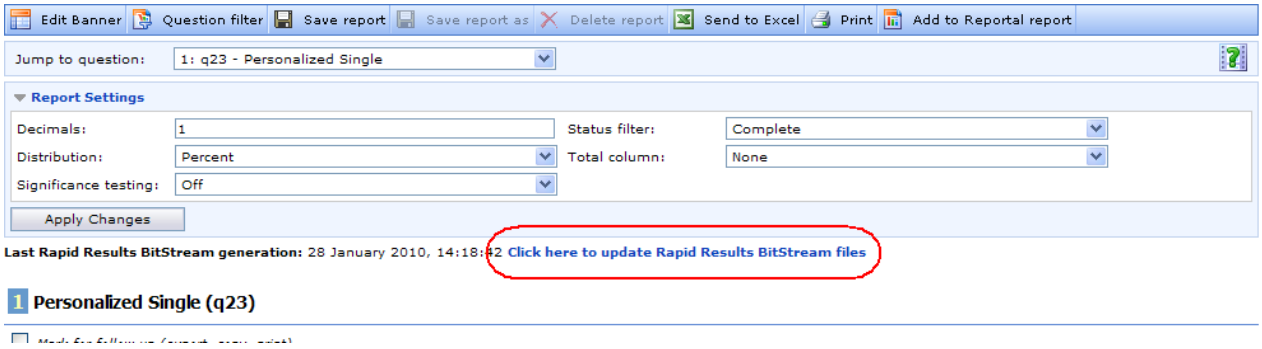


Figure 784 The Update BitStream Files link

The files and the date/time information are updated.

Note: Rapid Results generates its own BitStream files and does not use the same BitStream files as Reportal. This is to prevent Reportal reports from being affected by users' actions in Rapid Results.

23.3.1.7. Editing Result Charts

When the Rapid Results window first opens, the question result tables will be listed with the charts hidden.



Figure 785 An example of a question listed in Rapid Results

To display the chart for a specific question, go to that question and click **Show Chart**.



Figure 786 The same question with its chart open

You can now edit the chart settings. Click **Edit Chart Settings** to open the settings table for the chart.

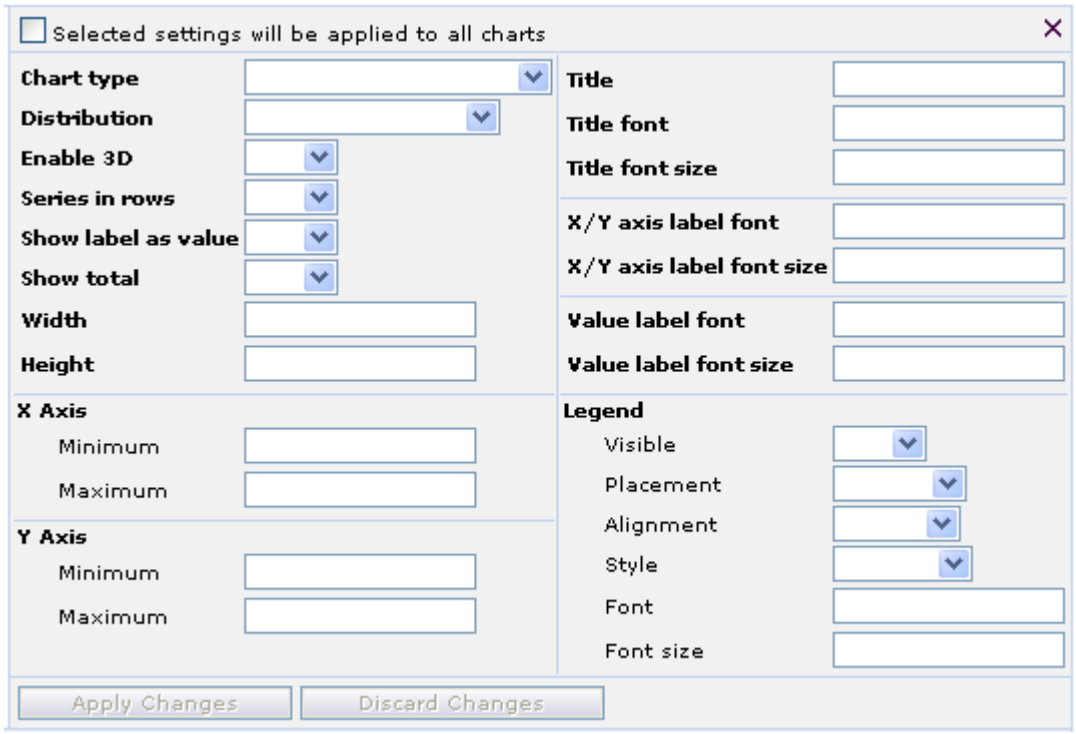


Figure 787 Example of the chart settings table

In all cases, either click the drop-down arrow to open a list of the available options then select the desired option from the list, or where a drop-down list is not available type in the appropriate details. The chart will be updated immediately so you can see the results of the parameter change. When you are satisfied with the layout, click the **Apply Changes** button.

The parameters are as follows:

- **Selected settings will be applied to all charts** – when selected, a checkbox appears beside each parameter in the settings table. Check the appropriate parameter boxes to copy the settings in those parameters to all charts in the questionnaire.
- **Chart type** – the results can be presented in many different layouts. Select the desired layout here.
- **Content** – a chart can show the results as the actual number of answers received, or that number as a percentage of the total number of replies, or the average, depending on the type of chart. Select the format to be used here. Default is %.
- **Enable 3D** – the chart can be presented as 2- or 3-dimensional. Select the desired option.
- **Series in rows** – a chart will always base the series (the result data points) on either rows or columns in the table. Select here.
- **Show label as value** – you can specify that each result in the chart is presented with its actual value as a percentage of the complete result or as a count depending on the content.
- **Show total** – select **Yes** to display an additional Total result, giving the total number of responses to the question (if Total is included in the table).
- **Width** – specifies the required width of the table in pixels. Default is 400.
- **Height** – specifies the required height of the table in pixels. Default is 400.
- **X Axis** – sets the minimum and maximum values displayed on the X-axis. Use this function to size the visible area of the chart and position the results to best effect. If no specific values are typed here, then Confirmit will use values that ensure the chart is displayed logically with respect to the results.

- **Y Axis** – sets the minimum and maximum values displayed on the Y-axis. Use this function to size the visible area of the chart and position the results to best effect. If no specific values are added here, then Confirmit will use values that ensure the chart is displayed logically with respect to the results.
- **Title details**:
    - **Title text** – type in the text you wish to appear as the title for the chart.
    - **Title font** – type in the font you wish to use to present the title text.
    - **Title font size** – type in the font size you wish to use to present the title text.
- **X/Y Label settings**:
    - **X/Y Axis label font** – type in the font you wish to use for the chart axes labels.
    - **X/Y Axis label font size** – type in the font size you wish to use for the chart axes labels.
- **Value label settings**:
    - **Value label font** – type in the font you wish to use for the result value labels.
    - **Value label font size** – type in the font size you wish to use for the result value labels.
- **Legend settings**:
    - **Legend Visible** – select **Yes** to show the legend, **No** to hide it.
    - **Placement** – the legend box can be positioned above, below or to one side of the chart. Select the position in which you want the legend box to be displayed.
    - **Alignment** – once you have decided which side of the chart you want the legend box to be placed, you can specify its position more accurately with respect to the chart origin. Select the location here.
    - **Style** – the legend can be presented as one column of details, as a row, or as a “best fit” table. Select the desired option here.
    - **Font** – type in the font you wish to use for the texts in the legend box.
    - **Font size** – type in the font size you wish to use for the texts in the legend box.
- **Apply changes** – saves the parameter changes you have made. Note that once you have applied the changes you cannot later discard them.
- **Discard changes** – removes all the changes you have made to the settings table parameters since the last time you clicked **Apply changes**. Note that this is not a step-by-step Back or Undo function; all the changes will be removed.

23.3.2. Reportal Reports

The **Reporting > Reportal Reports** menu item opens a page listing all the Reportal reports that are associated with the current survey.

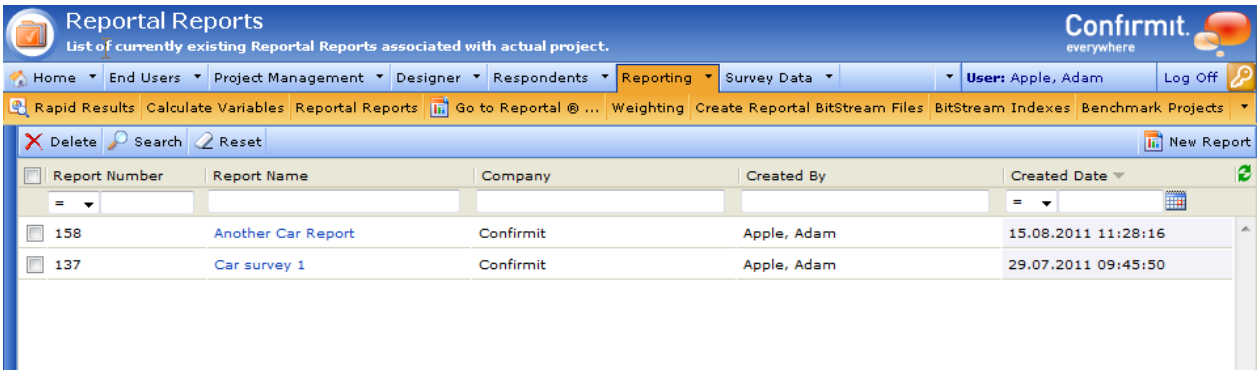


Figure 788 Example of a Reportal Reports list

In the event the list is extensive, you can search and sort the list to find the report you wish to work with. Click on a blue Report Name link to start Reportal and open the report. Note that the report will open in the mode applicable to the permission you have for that report.

When the mouse pointer is hovering over a report name, a drop-down menu becomes available for that report:

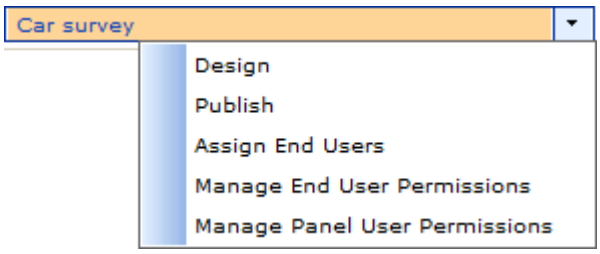


Figure 789 The drop-down menu

- **Design -** opens Reportal at the selected report.
- **Publish -** publishes the selected report.
- **Assign End Users -** opens the Assign End User List overlay, enabling you to select an end user list for the report.
- **Manage End User Permissions -** opens Reportal at the End User List page. Refer to the Reportal User Guide for further details.
- **Manage Panel User Permissions -** opens Reportal at the Panel User List page. Refer to the Reportal User Guide for further details.

You can create new reports using the Report Wizard functionality if a wizard is available to you (see The Report Wizard on page 724 for more information).

23.3.2.1. The Report Wizard

The Report Wizard enables you to quickly and easily create reports based on the current survey, or add elements to an existing report, using a previously created report template. The report templates are created in Confirmit Reportal - refer to the Reportal User Guide for further information.

23.3.2.1.1. How to Create a Report Using a Wizard Script

To create a report in Authoring, using a report wizard:

1. In the Reportal Reports page, click the **New Report** button located in the upper-right corner.

   The Create report... overlay opens.

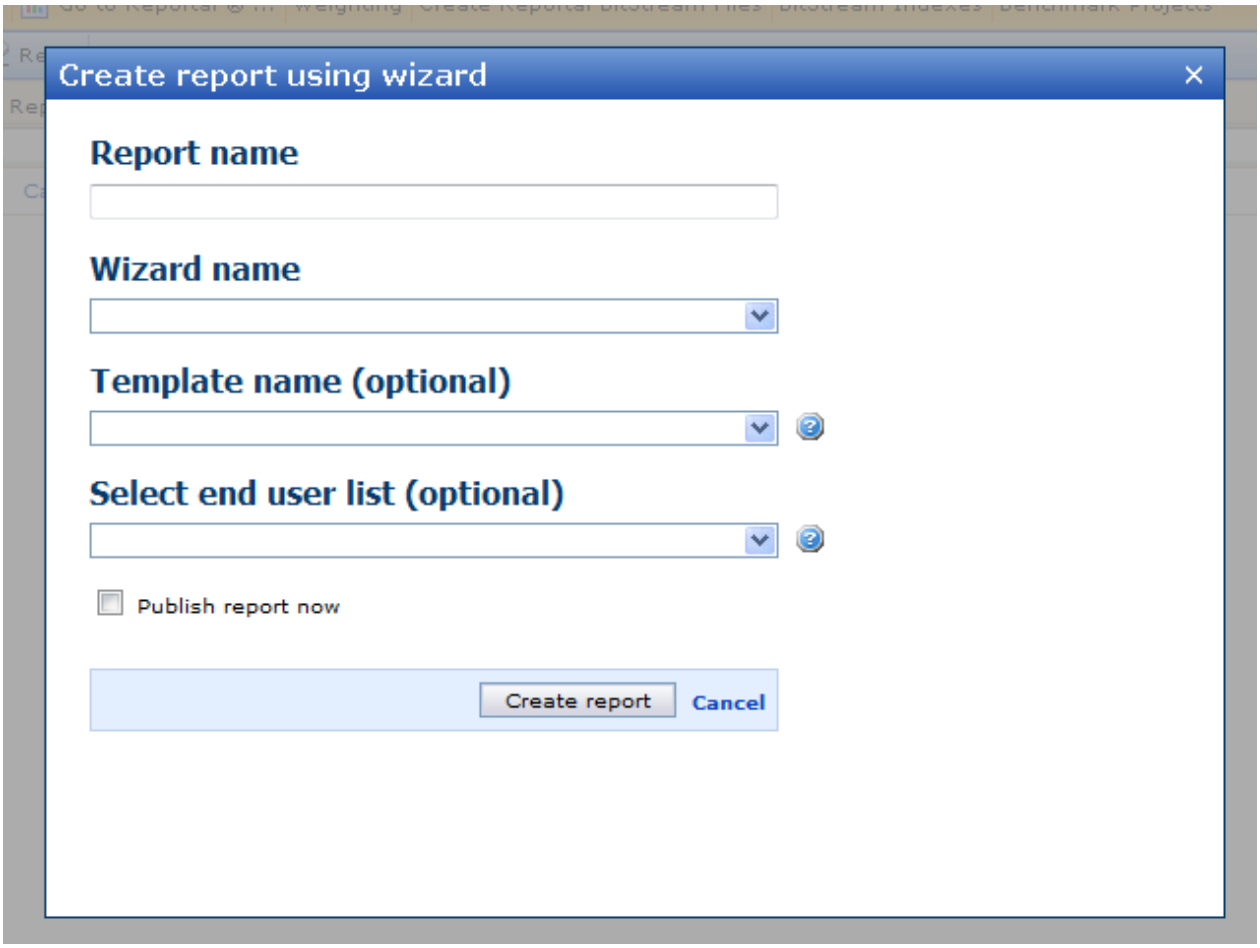


Figure 790 The Create report using wizard overlay

2. Type a name for your new report into the Report Name field.
3. Open the drop-down list of available wizards and select the wizard you wish to use for this report.
4. Select a template if required.

Note: As report wizard scripts may directly reference a specific template, the selection of a template here is optional. If you select a template here, the selection will override any template settings within the report wizard script. If you do not select a template here, and the selected wizard's script also does not specify a template, then when you click Create Report a warning message will be displayed.

5. Select an end user list if required.
6. Click **Create report**.

   A task is run and the report is created and added to the Reportal Reports list. Once the report is created, you can preview it by clicking the button that appears on the overlay. In the event the report is not as you expected, you can delete the newly created report from the preview screen.
7. On completion, close the overlay to return to the Reportal Reports list.

23.3.2.1.2. Using a Wizard Script in an Existing Report

Wizard Scripts can be used to add elements to an existing report.

1. In Authoring, go to the **Reporting > Reportal Reports** menu command.

2. A list of the reports associated with the current survey is displayed.
3. Click on the appropriate blue Report Name link to open Reportal and open the selected report.
4. In Reportal, go to the Report toolbox, right-click on the report icon and select **Insert from Wizard (Inside)**, or right-click on a page in the report and select **Insert from Wizard (After)**.

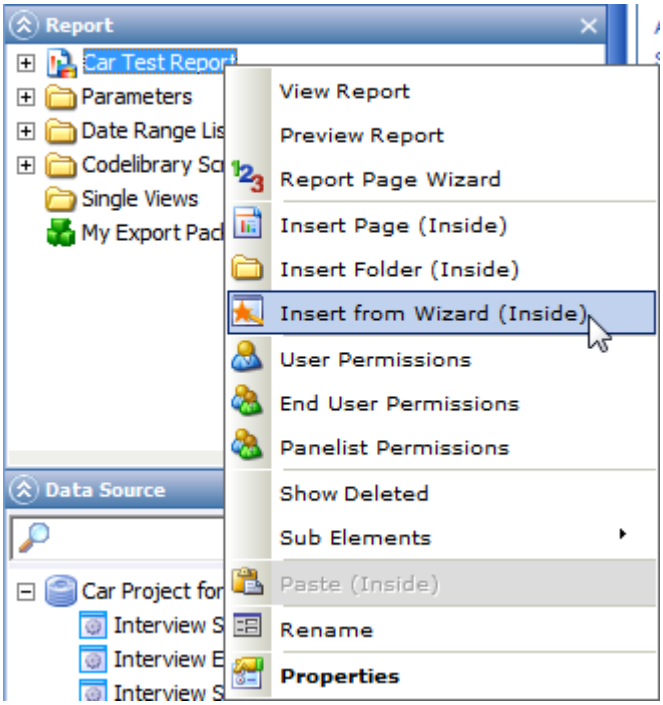


Figure 791 Inserting an object into an existing report using a Wizard Script

The Update Report with Wizard Script page opens, with a list of all the wizard scripts that are available to you.

5. Find and select the wizard script you wish to use, then click **Finish**.

   A task runs, and the appropriate objects are added to the report.

Note: The Preview button towards the right end of each row in the list opens an overlay showing the script contained in the wizard.

Note: Wizard scripts can be used to add new pages to existing reports, and can add any objects required on those new pages. However wizard scripts cannot add objects to existing pages.

23.3.3. Weighting

A normal survey will elicit responses from a very small (relatively) sub-set of the general population. Also, in most cases, not all of the intended respondents will reply to the survey. The resulting respondent data may therefore need to be weighted to adjust the data presented in the report such that it reflects the "real world" situation. Confirmit enables you to create weight models for a survey that can then be applied to the reports based on that survey. The applied weight models are included in the result calculations between the real respondent data and the report, to adjust the data as required.

Weight models may be applied to the entire report, or to individual elements in the report such as folders, pages and tables.

Note: Weight models applied lower in the report hierarchy override those that may be applied higher up. For example a model applied to a folder will override one applied to the report.

It is not possible to apply weighting on questions that were answered only by a part of the respondents, for example questions in conditions.

Weighting is only applied to complete records.

23.3.3.1. How to Create a New Weight Model

To create a new weight model for a survey:

1. Go to the **Reporting > Weighting** menu command.

   The Weight Model List window opens with the weight models currently available for this survey. If no weight models currently exist, then the list will be empty. To edit an existing weight model, click on the appropriate blue Weight ID link to open it.

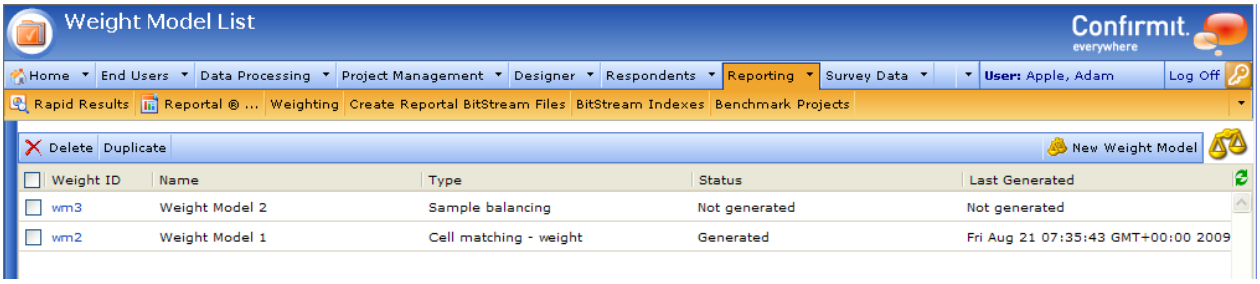


Figure 792 Example of the Weight Model List

2. Click the **New Weight Model** button located towards the right end of the window's toolbar.

   The Weight Model page opens at the Overview tab.

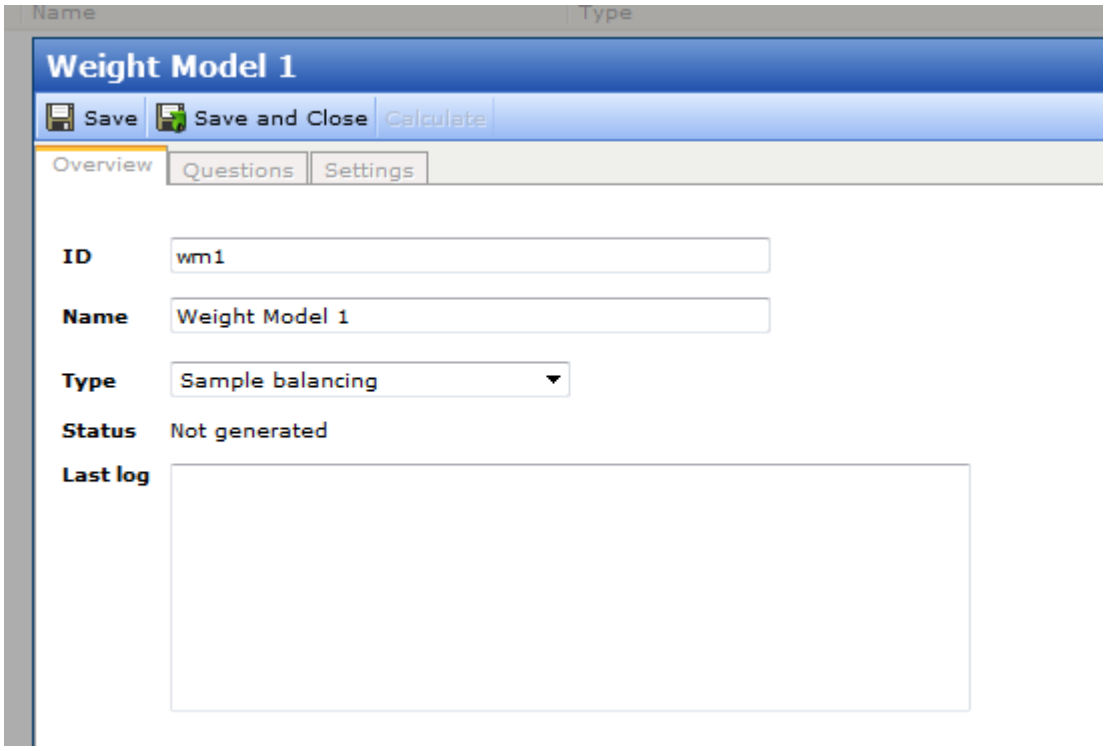


Figure 793 The Weight Model page

On this tab you define an ID and a Name as required (see The Weight Model > Overview Tab Properties on page 731 for more information). The system will define an ID by default; this can be changed as required.

Note: A weight model ID must be all lower case, it must be a maximum of 13 characters including any separators, and it cannot have the same ID as a question ID in the survey. If a weight model has the same ID as a question ID used in the survey, the weight model generation will fail and an error will be generated.

3. On completion, click **Save** to save the changes.

   The weight model is created and the remaining tabs are activated.

Note: Once the weight model is created, you can save changes in the Weight Model window either by clicking the Save button in the window's toolbar or by moving to a different tab; changes are then saved automatically.

4. Go to the Questions tab.

   On this tab you select which questions are to be used in the weight model. Note that the questions listed in this tab will depend on the model Type selected in the Overview tab. For Sample Balancing and Cell Matching, only Single questions can be used in a weight model; for Survey Question, only Open Numeric questions can be used. Questions that reside within loops cannot be selected.

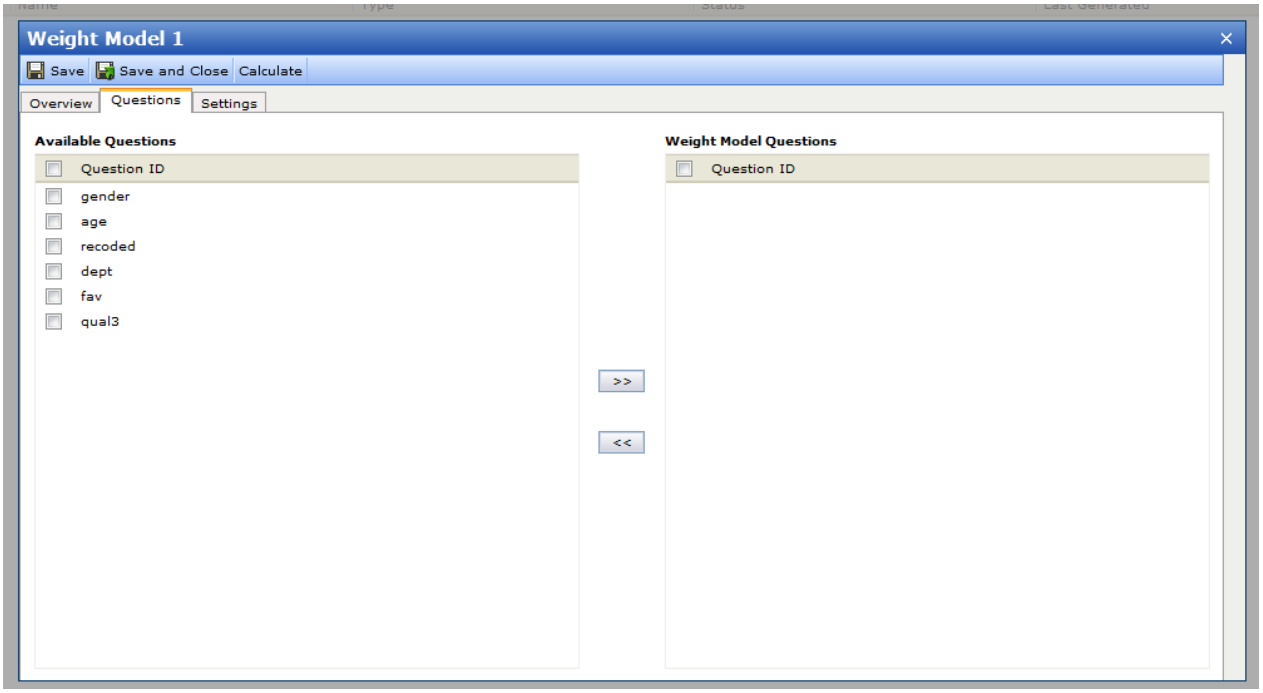


Figure 794 Example of the Questions tab

5. Select the questions to be used.

   There are two methods of selecting the questions; click on the question in the Available Questions list to select it then click the **>>** button to move it to the Weight Model Questions list, or double-click on the question in the Available Questions list. Use the same methods to remove an unwanted question from the Weight Model Questions list.

Note: The order in which the questions are selected will be the order in which the questions are used in the weight model.

6. On completion click **Save** then go to the Settings tab.

   The options on this tab will depend on the Type selected on the Overview tab.

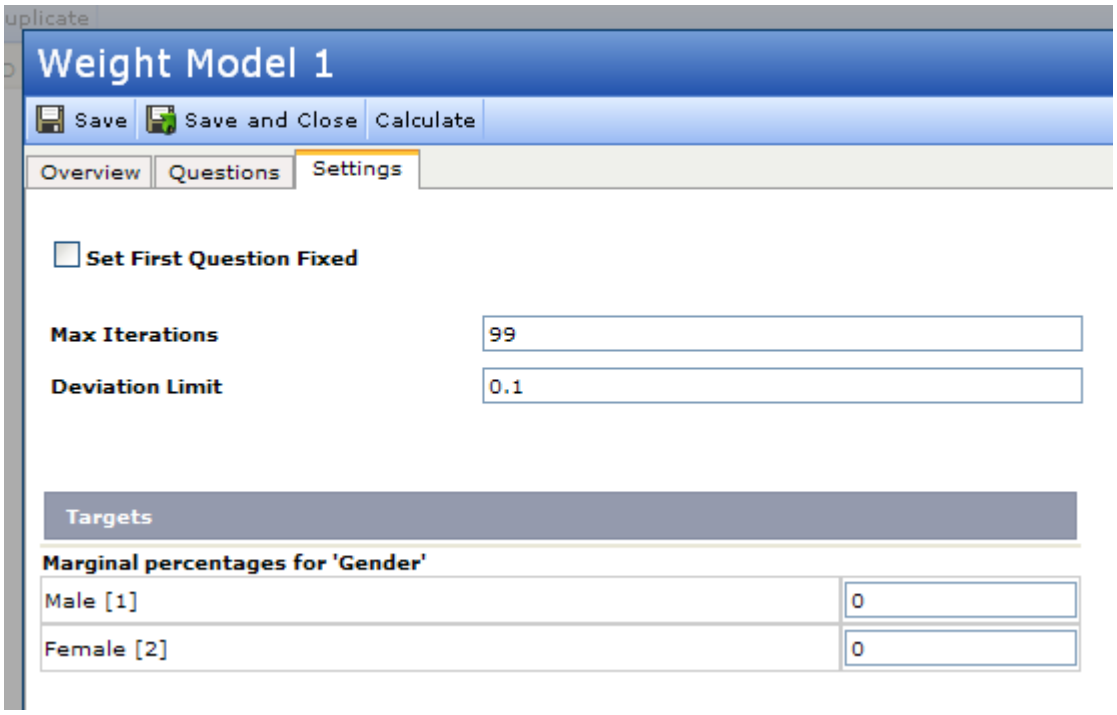


Figure 795 The Settings tab when Sampling Balancing is the selected Type

A Target set will be presented for each question selected in the Questions tab. The weights input for each Target set must total 100%.

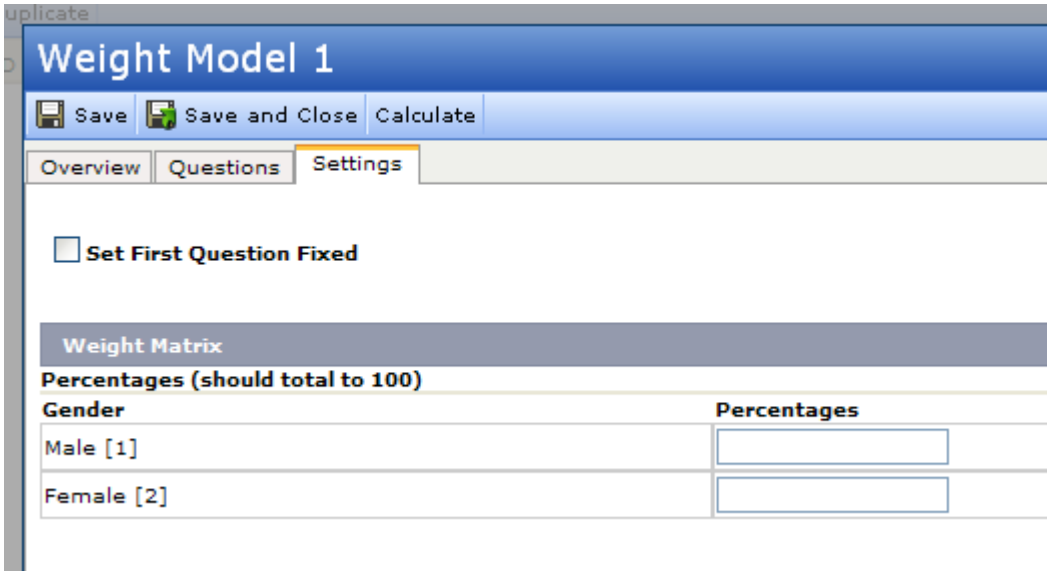


Figure 796 The Settings tab when Cell Matching - Percentage is the selected Type

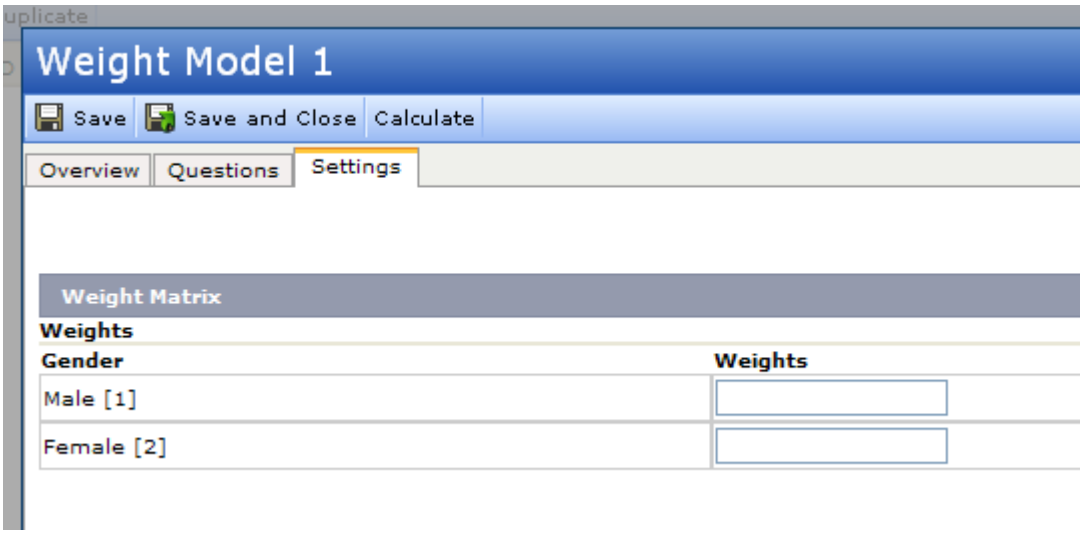


Figure 797 The Settings tab when Cell Matching - Weight is the selected Type

Note: If the Survey Question type is selected, there are no further settings to make.

7. Add the appropriate values to the fields in the Settings tab, then click **Save** to save the changes.
8. Click the **Calculate** button in the window toolbar to open the Calculate Weights dialog.

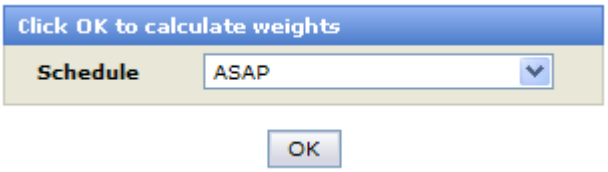


Figure 798 The Calculate Weights dialog

9. Either leave the Schedule as ASAP and click **OK** to add the task to the queue immediately, or select **Schedule for Later Execution** and then click **OK** to open the Recurring Task window (see The Task Properties Recurrence Tab on page 60 for more information). Here you can set up the task to run at a specific date and time, and/or repeat as required.
10. On completion, click **Close Window** (located towards the lower edge of the Weight Model page) to return to the Weight Model List.

23.3.3.1.1. The Weight Model > Overview Tab Properties

The properties and fields on the Overview tab are as follows:

- **ID** - the identification number for the weight model. This is defined automatically by the system when the model is created, but can be changed by the user as required.

Note: A weight model cannot have the same ID as a question ID in the survey. If a weight model has the same ID as a question ID used in the survey, the weight model generation will fail and an error will be generated (see Question ID on page 235 for more information).

- **Name** - the "logical" name for the weight model. This is defined automatically by the system when the model is created, based on the next available ID number. (Note that if you change the ID from the system-generated value, then that number will become available to be used in the Name the next time a model is created). The Name can be changed by the user as required.

- **Type** - specify the type of weight model to be used. The Type is selected in the Weight Matrix tab. Four types of weight models are available:

  - **Sample balancing -** used for weighting along multiple dimensions when only the marginal reference percentages along each dimension are known. For example: It is known that the reference population is 30% male and 70% female and that 60% of the population own a car while 40% do not. From these facts the actual weights are calculated according to the standard sample-balancing algorithm. Max iterations and deviation limit for this algorithm decide how accurate the calculations are required to be. Note that the percentage values entered must total to 100%.

  - **Cell matching - percentage -** used for weighting along multiple dimensions when all the matrix cell percentages are known. For example, it is known that 20% are male with cars, 10% are male without cars, 40% are female with cars, 30% are female without cars. From these facts, the weights can be calculated by dividing the sample percentages by the reference percentages. Note that the percentage values entered must total to 100%.

  - **Cell matching – weight -** with this method all the weights are entered directly and not calculated by comparing a reference with the sample. The method may for example be used if the weights are calculated by another system.

  - **Survey Question -** this method provides the user with the ability to directly use weight factors stored in a survey question for each respondent, instead of factors resulting from the other weight model types. The weight factors can for example be imported into a hidden question in the response data set. This enables you to calculate weight factors outside Confirmit and apply them directly to reports in Reportal, for types of weighting not supported by the current weight models in Confirmit.

- **Status** - the status of the weight model. Once the model has been generated then the Last Log field will be populated with the appropriate data.
- **Last Log** - shows the details of the last weight model generation task that has been performed on the current model.

23.3.3.1.2. The Weight Model > Settings Tab Properties

The properties and fields on the Settings tab are as follows:

- **Set First Question Fixed** - in the event you wish to report on data divided into time periods, for example months, then you will probably wish to weight the data for each time period separately rather than weight the data set as a whole. Check this box to keep the first question with fixed values (see Weighting Different Sub-samples Separately on page 733 for more information).
- **Max Iterations** - the maximum number of times the iteration is to run. This will restrict the time taken for the process to run in the event the desired values are difficult to achieve.
- **Deviation Limit** - the acceptable accuracy tolerance. Once the system has come within this limit the iteration process will stop.
- **Targets** - set the target values the system is to aim for during the iteration process.

23.3.3.2. How to Apply a Weight Model to a Report

Weight models in Horizons are created for a specific survey. Once created they can then be applied to reports or elements in reports (folders, pages or tables) that are based on that survey. The weight models must be defined in Authoring before they can be used in the report (see How to Create a New Weight Model on page 727 for more information).

Each element in the report that can have a weight model applied to it has the Weight Model property in the element's Properties sheet. The drop-down in this property contains a list of the weight models defined for the survey on which the report is based. In Reportal, go to the appropriate element's Properties sheet, select the required weight model from the drop-down list and save the change to apply the model to that element in the report. Refer to the Reportal User Guide for further information on using weight models.

Note: Weighting is only applied to complete records.

Important
In the event a weighting model is based on a survey question that for some data records is not answered (has the value NULL), then the results published in a report will differ depending on whether the BitStream query engine or the SmartHub query engine is used. If weights are missing, the BitStream engine defaults to 1 while the SmartHub engine defaults to 0 and therefore excludes these records from aggregated tables.

23.3.3.3. How to Duplicate a Weight Model

To duplicate a weight model:

1. When in a survey, go to the **Reporting > Weighting** menu command.

   The Weight Model List page opens.

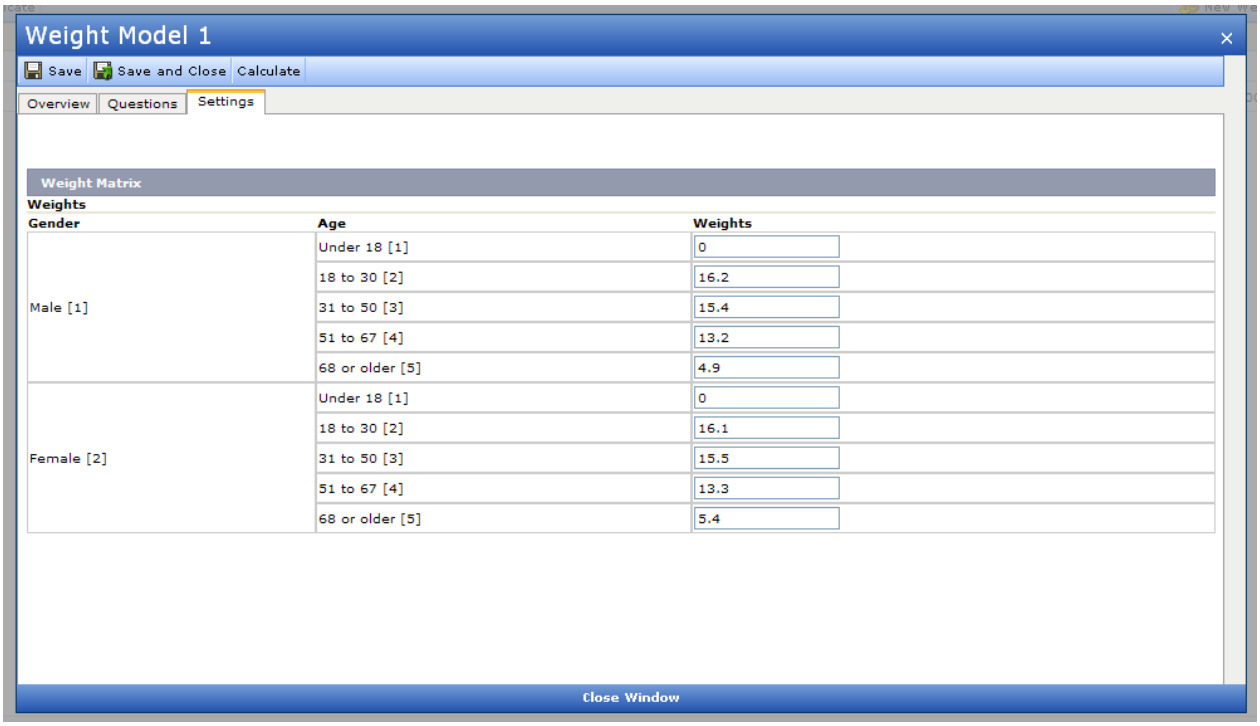
2. Check the boxes for the weight models you wish to duplicate, then click **Duplicate**.

   The selected weight models are duplicated, and given the name "Copy of [original name]". You can now edit the new weight model as required.

23.3.3.4. Weighting Different Sub-samples Separately

In continuous surveys where you report on different time periods (for example week, month, quarter or year) you may wish to weight each time period separately to match the same target distribution on some variables, keeping those calculated weights for each period. This can be achieved by using the *"First question fixed"* property on the weight model.

For example, assume that you are weighting on age and gender to match the distribution shown below:



Gender	Age	Weights
Male [1]	Under 18 [1]	0
	18 to 30 [2]	16.2
	31 to 50 [3]	15.4
	51 to 67 [4]	13.2
	68 or older [5]	4.9
Female [2]	Under 18 [1]	0
	18 to 30 [2]	16.1
	31 to 50 [3]	15.5
	51 to 67 [4]	13.3
	68 or older [5]	5.4

Figure 799 Distribution targets

Note: Under 18s have been screened in the example survey.

When reporting on this survey, we will be looking at results per month. In the survey there is a "month" question where the month of the response is set. This question will be used to indicate the sub samples to which the weighting should be applied. We want to apply weights to achieve the same distribution on gender and age for each month.

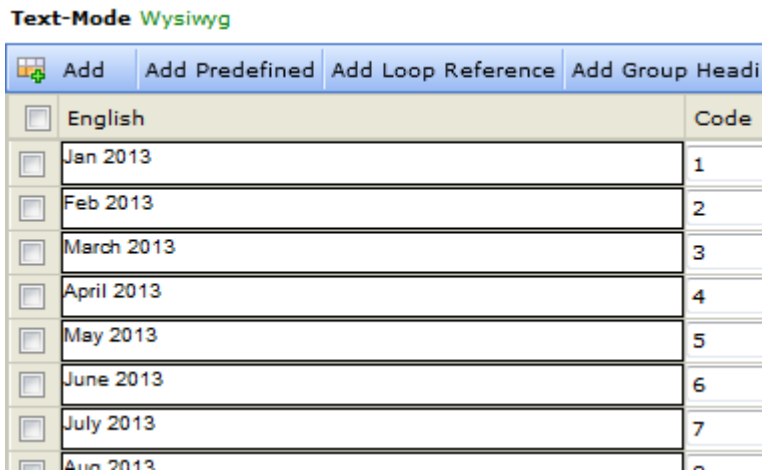


Figure 800 Extract from the answer list of the month question

In the weight model, month will then have to be included as the first object:

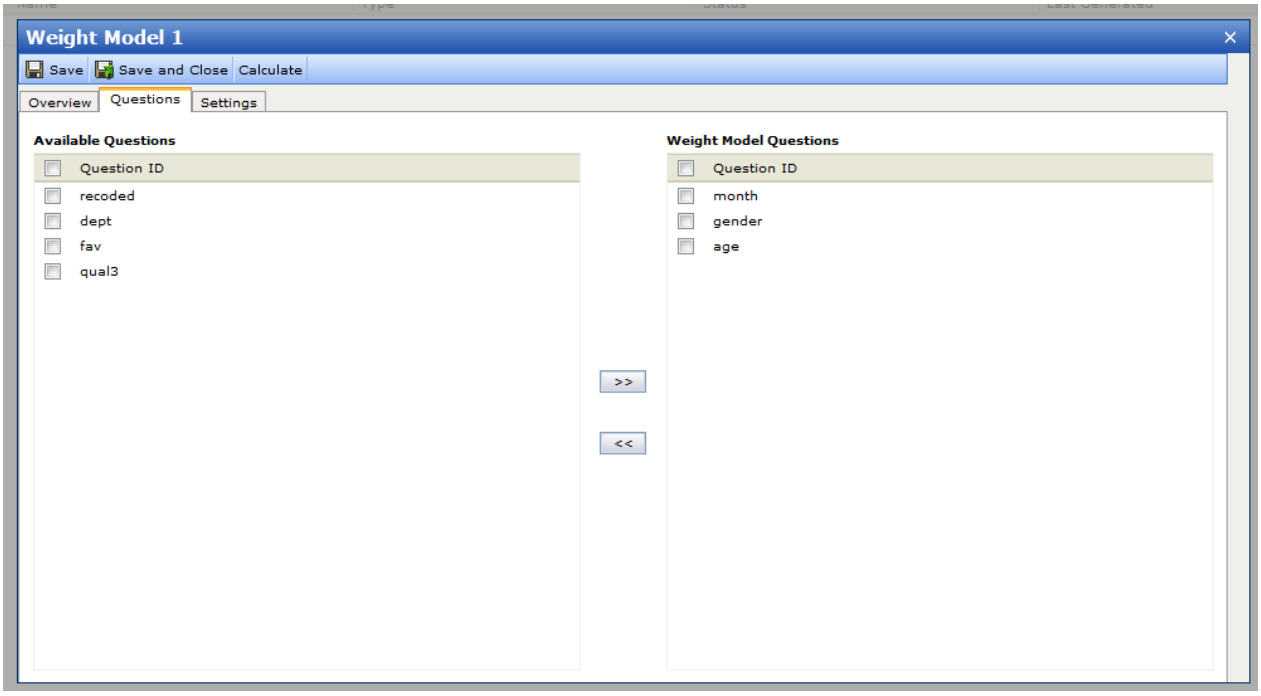


Figure 801 Weight model order of questions selected

In weight model properties, the "First question fixed" property is set (see The Weight Model > Settings Tab Properties on page 732 for more information). This means that weights will be calculated for gender and age for each of the values of the month question separately.

Now, if you double-click on the month question in the weight model, you can set which codes (which months) are to be available for weight calculation. Typically the answer list will include the entire year, but weights should only be calculated for months that have passed.

Note: It is only possible to calculate a sub-sample for which data has already been collected.

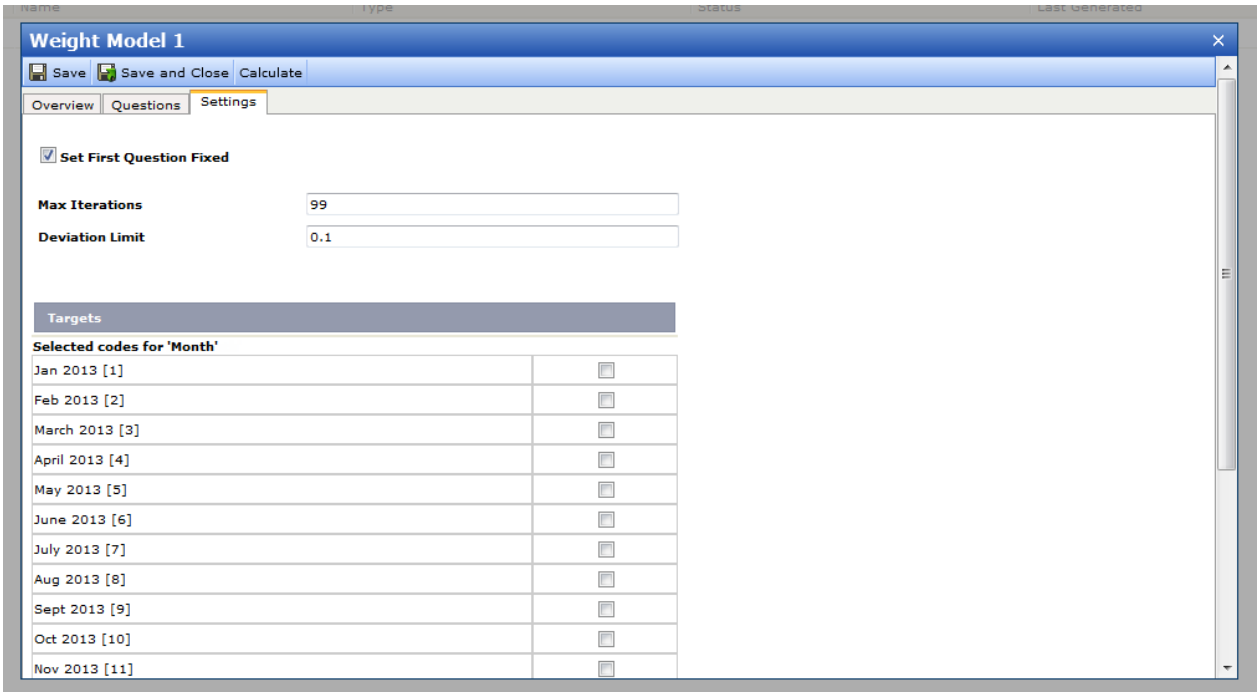


Figure 802 Set active codes in the "fixed question", month

When calculating a weight model with a "fixed question", you can select one of three options:

- Calculate weights for all of the codes selected.
- Calculate weights for a subset of them (only specific codes).
- Calculate weights for those codes that have been activated since the last weight calculation (only new codes), keeping the existing weights for the other codes.

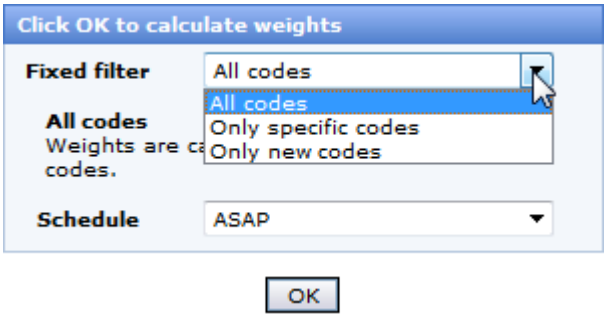


Figure 803 Select which codes the weights are to be calculated for in the "fixed question"

23.3.4. BitStream Files

BitStream Files are a way of storing survey data in compact files. These files are optimized for fast access, to allow aggregated tables to be generated as quickly as possible for your Reportal Report. While Confirmit recommends you use BitStream Files on all surveys, the benefits will be more obvious for surveys with large data sets.

Before the BitStream Files are created for a database, when Reportal wishes to generate an aggregated table it must interrogate the SQL database directly. This can be a slow process, and it will become even slower as the database size increases.

The BitStream Files are created by initiating a task in Confirmit that runs through the survey database and saves the survey data to files. Once the files have been created, you can go to the Properties page for the report and specify that BitStream Files are to be used for the current report (go to the Reportal User Guide for further details).

Two different BitStream file sets can be generated; one for Rapid Results reporting and one for the Reportal report. Under most circumstances you should keep the two types separate (use each type for its intended purpose), but if for some reason you need to use the same type for both applications then you should select to use the Rapid Results file set. Rapid Results reporting and the Reportal report will then always display the same data.

Note: For Confirmit surveys you can create only two different BitStream file sets: The Reportal file set, and Rapid Results file set (which is used in Rapid Results and Survey Designer, and the Results tab/Topline report in Survey Designer). However using Panel Management rules in Professional Panels you can create several file sets, taking different cuts of the data. Then for Professional Panels surveys in Reportal, a drop-down list will include the BitStream file sets you have created in panel rules (with the names you have assigned to them there). Refer to the Reportal User Guide for further details.

23.3.4.1. How to Generate BitStream Files

1. Go to the **Reporting > Create Reportal BitStream Files** menu command.

   The page shown below opens.

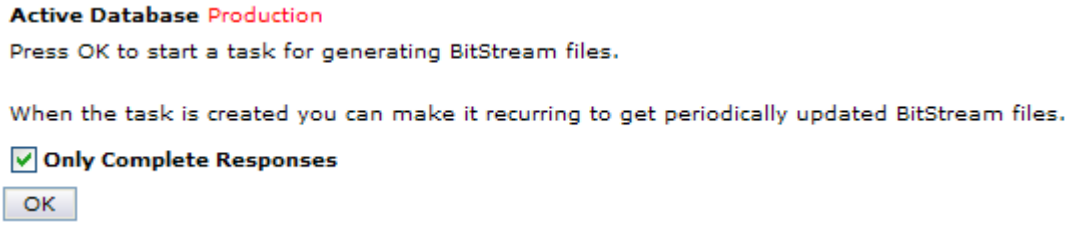


Figure 804 BitStream File generation settings

1. Choose whether you wish to generate BitStream files only on complete responses (default), or on all responses.

Note: Only select all responses (uncheck the box - see below) if you want to include the results from respondents with other statuses (incomplete, screened etc.) in your reports.

2. Click **OK**.

   The files are generated as a task in Confirmit.

   Once the BitStream files have been generated for a survey, the task exists. If you later go to the **Create Reportal BitStream Files** menu command, the settings page will have changed to that shown below.

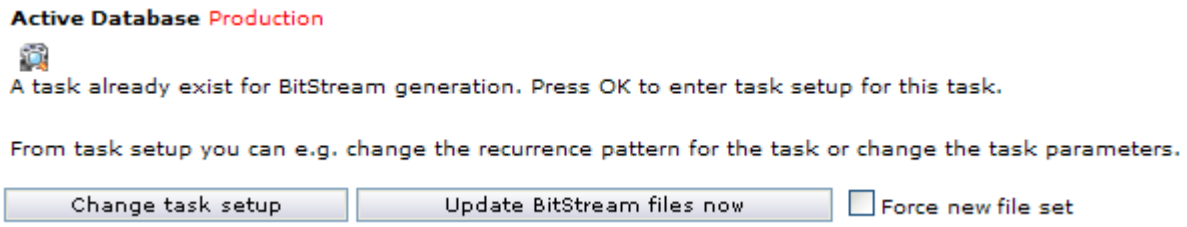


Figure 805 The BitStream Files generation settings page once the task exists

This page allows you to change the task, for example to make it a recurring task, and to run the task immediately. The buttons are as follows:

- **Change task setup** - click to open the Task Setup page (see below).
- **Update BitStream files now** - click to start the BitStream File update task immediately (the task will be placed in the queue and will be run when its turn comes).
- **Force new file set** - normally when the BitStream file task runs, the existing files will be updated. Check this box to delete the existing files completely and replace them with new files. Note that this only affects the data that is included in the report, not the report itself, so no other actions are necessary.

3. Click **Change task setup** to open the Task Setup page for the task as shown below.

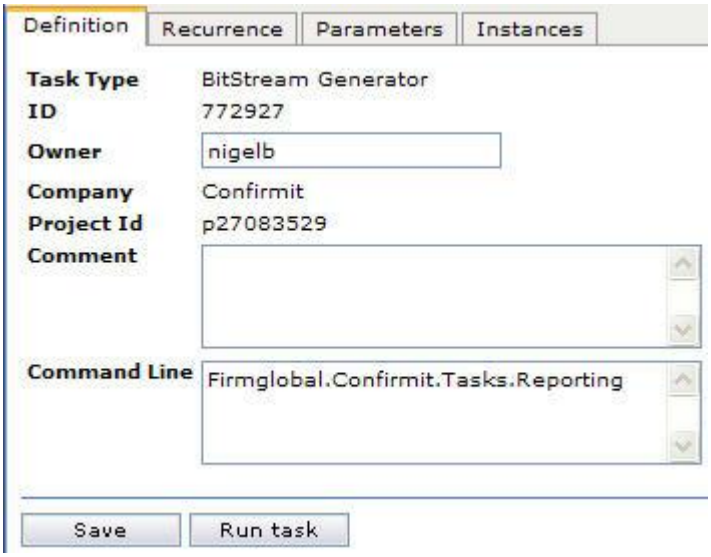


Figure 806 BitStream Generator task parameters

Go to the Recurrence tab and click **Change** to access the recurrence properties (see Updating the BitStream Files on page 720 for more information).

23.3.4.2. BitStream File Update Recurrence

If you are running a live survey and wish to have the BitStream files updated at regular intervals to add new responses, you can set up a recurrence pattern on the BitStream generation task. You can for example have the files updated twice a week on Mondays and Thursdays at 2 o'clock in the morning.

As the BitStream file creation process will interrogate the SQL database to retrieve the data on the survey, you are recommended to set the task to run during periods when low activity in the survey can be expected, for example late at night.

1. To set the task to repeat at regular intervals, go to the Recurrence tab and click **Change**.

   The layout of the tab changes.

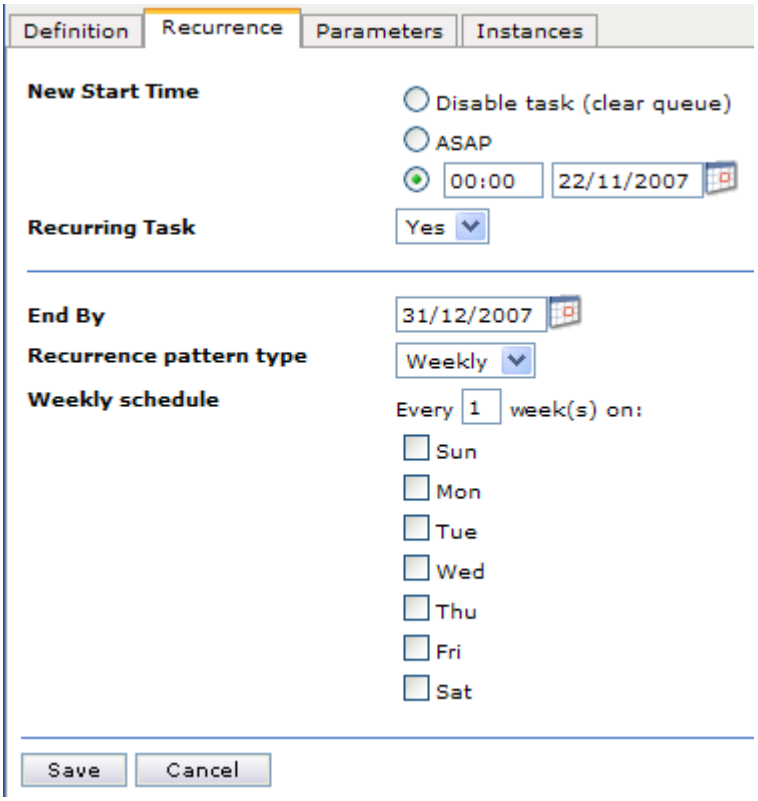


Figure 807 The Recurrence Pattern dialog

2. Make the settings as required then click **Save.**

Note: The times the task is set to run will be "server" time - the time at the server on which your survey is running. If you are sitting in a different time zone from the server, you must bear this in mind when deciding when you wish the task to run.

The tab changes to the layout shown in the example below. The next few schedules occurrences are listed.

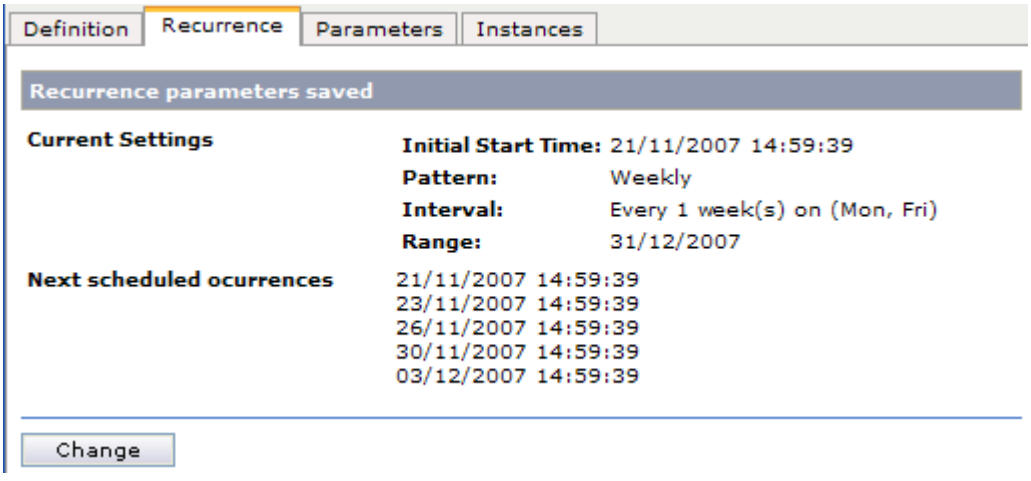


Figure 808 Example of the Recurrence tab with scheduled occurrences

When running a BitStream file generation on a survey where BitStream files have already been created, the existing BitStream files will be updated if:

- Responses are added, changed or deleted.
- Questions are added or removed from the survey.
- The type of a question is changed (for example multi -> single).
- Questions or loops are moved into another loop or out of a loop.
- Codes are changed or items are added to or removed from the answer lists of grids, multis and loops.

This ensures that the calculations performed on the BitStream files will be correct with respect to the content of the entire survey database at the time of the last execution of the BitStream generation task.

Note: If you use recoded variables in your survey, ensure that the recoded variables are calculated for new responses before the BitStream generation is run.

23.3.4.3. BitStream Indexes

If a large number of reports are to be created, the database is large, and/or you often need to filter for a particular question, then you can index the BitStream files. This will flag specified rows in the database, thereby reducing search times and improving performance.

You can index the BitStream file for Interview_start, Interview_end, status, single and multi questions.

To create a BitStream Index:

1. In Horizons Authoring, go to the **Reporting > BitStream Indexes** menu command.

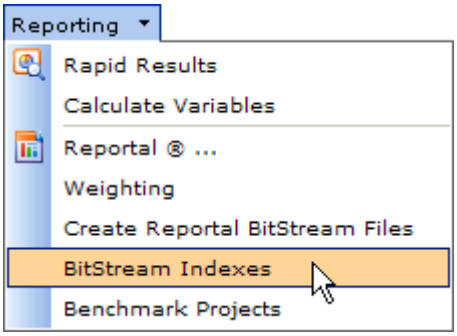


Figure 809 Starting BitStream Indexing

The BitStream Indexes page opens as shown in the example below.

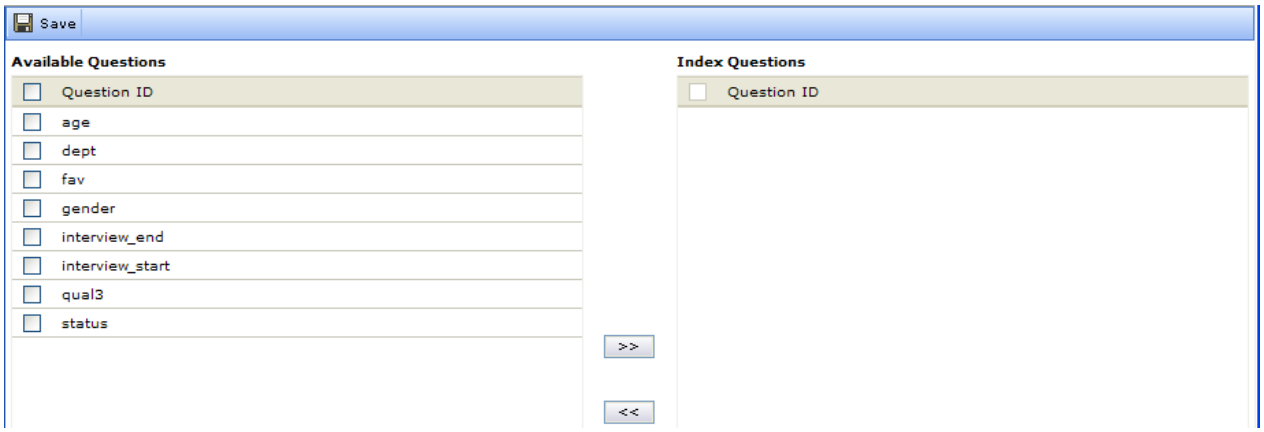


Figure 810 The BitStream Indexes page

2. In the Available Questions column, select the questions you wish to create the index for, and click the **>>** button to move them to the Index Questions column.
3. Save the changes.
4. Create the BitStream files (go to the **Reportal > Create Reportal BitStream Files** menu command) (see How to Generate BitStream Files on page 736 for more information).

   A task pane opens, indicating the status of the task. Here you can set the task to re-occur if you wish to update the file at regular intervals. On completion, the file will be indexed as specified.

23.3.5. Create Reporting Data

If you are reporting on one survey, you can use Reporting Data instead of BitStream files. This uses the same database and analytics engine as SmartHub, but without having to configure a hub just for one source. Select this menu option to set up the data automatically in a simple hub ready for reporting. The first time you select this option for a survey, the message box shown below opens.

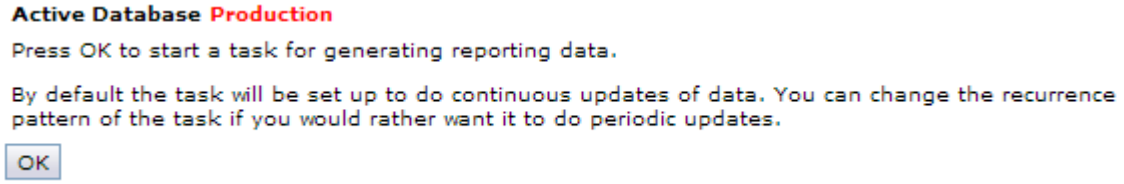


Figure 811 The message box the first time the menu item is selected

Click **OK** to create and run the task.

A standard Confirmit task page opens. On completion, you can go to the other tabs in the page to view the details. In the Recurrence tab, the default setting for Pattern is Continuous. This means that the system will check the data every fifth minute and if changes are registered then the task will be run. If no changes are registered then the task will not be run.

Once the task exists, on subsequent occasions when you select the menu option, the message box shown below opens.



Figure 812 The message box displayed on subsequent selections

Click **Change task setup** to open the task definition page for the hub loader. This page is essentially the same as the "standard" task definition page (see The Task Properties Page on page 60 for more information), the only difference being in the Recurrence tab. In this case, when you click the **Change** button, you have a different set of options in the Recurrence Pattern Type drop-down. These are:

- **Continuous -** the system will check the response data every fifth minute and if any changes have occurred since the last time the task was run then the task will be run again.
- **Hourly -** specify a number of hours. The system will wait for the specified time, check the response data, and if any changes have occurred since the last time the task was run then the task will be run again.
- **Daily -** specify the number of days between checks, otherwise it is the same as for Hourly.
- **Weekly -** set up a weekly schedule. You can specify a number of weeks, and select on which day(s) the check is to be performed. For example you can specify the check to be run on Wednesday every third week.
- **Monthly -** set up a monthly schedule. You can specify a number of months, and select on which day of the month the check is to be performed. For example you can specify the check to be run on the 25th day of every second month.

In all cases, an incremental data upload is performed by the task, updating with any changes since the last task execution. If no changes are registered then the task will not be run.

23.3.6. Using Reporting Data in Reportal

In Reportal, if you have a report that has only one data source and was using BitStream files, you can change this to use Reporting Data instead. To do this, in Reportal, go to the Data Source toolbox, right-click on the root folder and select **Switch Data Source to Hub**. Note that this is a one-way operation - once you have changed the data source to use the hub it cannot be changed back to use BitStream files. Also note that this will apply to all reports using the same data source. If you want to switch a live report to “Reporting Data”, it is recommended to duplicate the report first, and switch the duplicate to “Reporting Data” and verify that the report works as it should, before switching the original. Refer to the Reportal User Guide for further details.

24. The Advanced Filter Designer

You can create filters for yourself (and other Confirmit authors) to use while you are working on the questionnaire and the respondent data. You can then use the filters in an administrative format to search for data, text etc.

To create a filter, you first define it, then you drag the appropriate questions from the questionnaire tree and drop them into the filter folders.

You can have two types of relationships between the elements in a filter: they can be linked with the **AND** operator or with the **OR** operator. These objects are located in the Components branch towards the bottom of the questionnaire tree, and you can drag then into to the filter branch as required. You can invert the logic and toggle between AND and OR as required(see Inverting the Logic on page 748 for more information). You can also define levels in advanced filters.

24.1. Worked Example

This worked example describes step-by-step how to build an advanced filter. This example in based on a fictitious survey that is intended to discover people's requirements and attitudes when buying a new car. The filter is based on two single questions (in this case Gender and Age), one multi question (Cars Text-Driven) and one grid question (Qualities I).

Note: The survey/panel must be launched before you can create the filter expression.

Assume we wish to define a filter such that we can call out the data as follows:

> Male respondents under 51 who have test-driven either BMW or Chrysler, and on the second level, who are interested in Price and Safety (have answered 4 or 5 to those questions).

Create the filter as follows:

1. Enter the survey for which you wish to create the filter.
2. Go to the **Survey Data > Edit** menu command, then click the **Advanced Filter** button in the filter window.

   The Advanced Filter Designer window opens. Here you can define simple and complex filters that you can apply to the topline report. The same functionality is also used in Edit Survey Data and in Sampling for Panels.

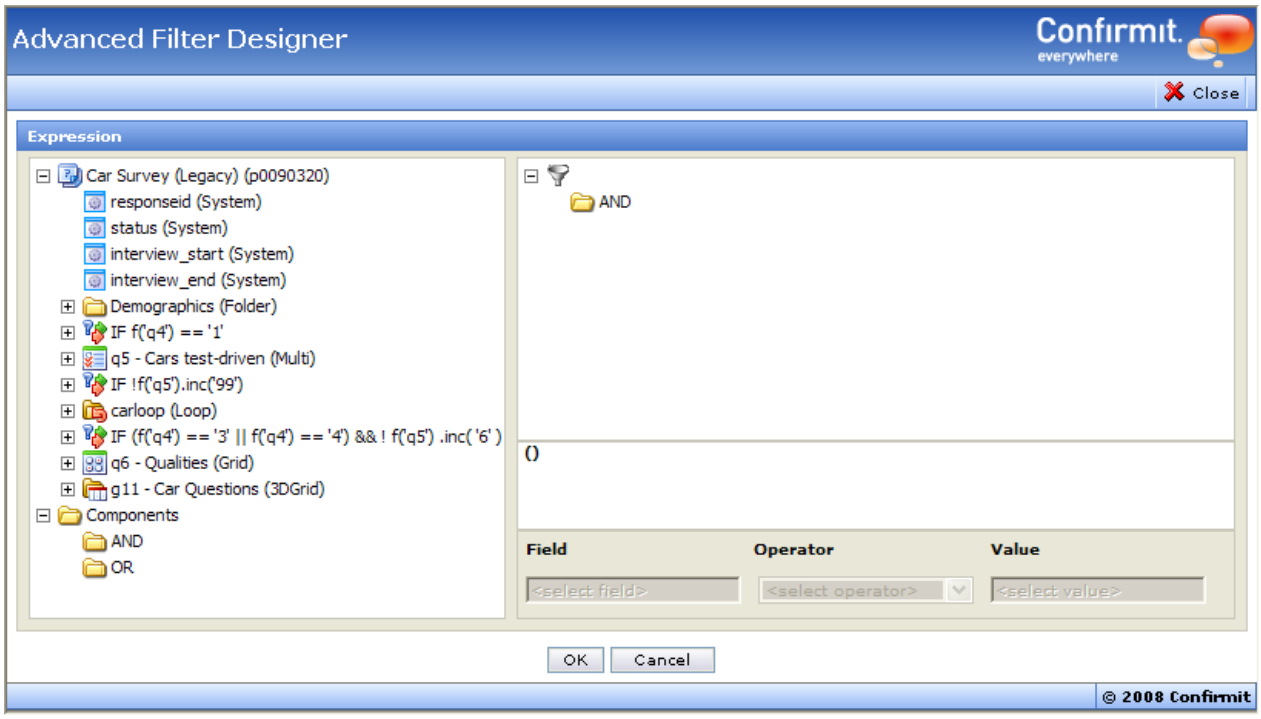


Figure 813 The Advanced Filter Designer window

3. Drag the **Gender, Age** and **Cars Test-Driven** questions from the questionnaire tree and drop them into the **AND** folder in the filter.

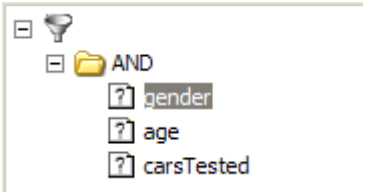


Figure 814 The three questions in the filter

Note: To insert the first element into the folder, point at the folder icon when releasing the mouse button. Subsequent elements can be positioned before or after the first within the folder by dropping them when the dotted line is in the desired position.

You must now specify the desired values for the questions.

4. Click on the first element (in this case **gender**)to activate the Expression Builder, then click the ellipses button beside the **Value** field.

   Note that for single questions the operator will always be IN, and for multi questions the operators will be AND or OR.

   The Select Answers window opens.

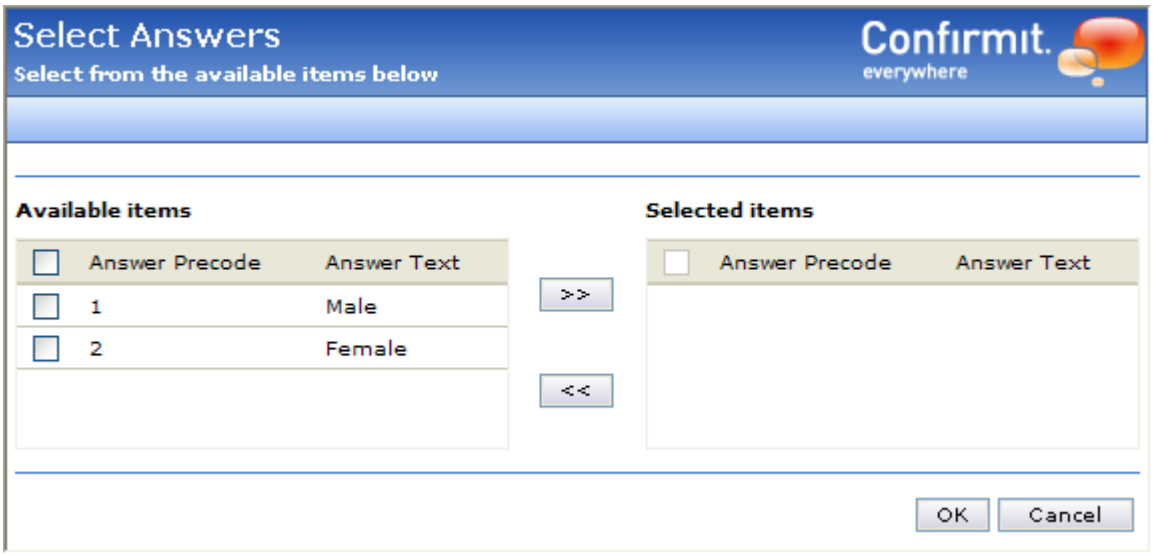


Figure 815 The Select Answers window for the Gender element

5. In the Available Items column on the left, select the **Male** option (we are looking for male respondents), then click the **>>** button to move Male over to the Selected Items column.
6. Click **OK**.

   The Select Answers window closes and the code **IN 1** appears after Gender in the filter.

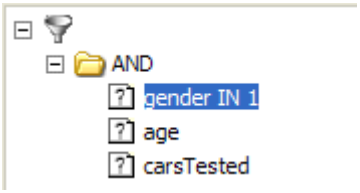


Figure 816 The Gender element with Male (code 1) specified

7. Click on the **age** element to activate the Expression Builder for that question, then click the ellipses button beside the **Value** field.

   Again the Select Answers window opens, this time with the Age options listed in the Available Items column.

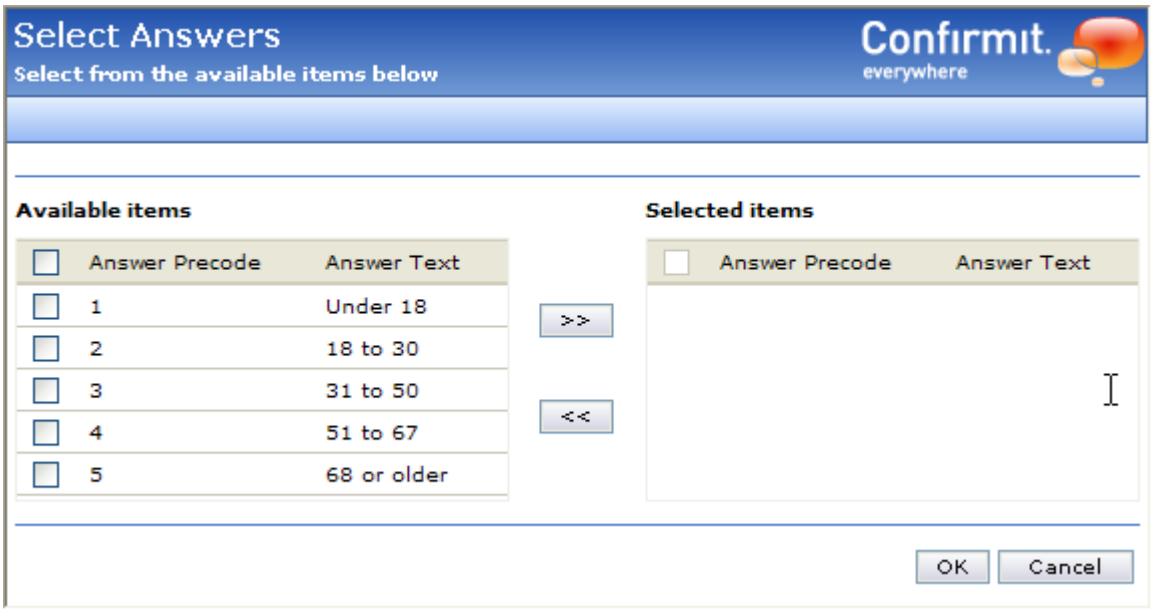


Figure 817 The Select Answers window for the Age element

8. We are looking for males under the age of 51, so select the first three options and click the **>>** button to move them over to the Selected items column.
9. Click **OK** to close the window.

   The filter will look as shown below.

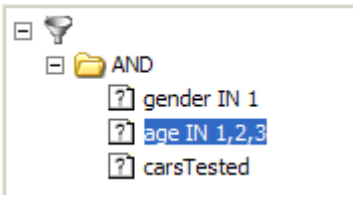


Figure 818 The Age element with codes 1, 2 and 3 selected

10. Click on the **carsTested** element to activate the Expression Builder for that question.

    The Operator options change to AND and OR. Here in this case we need OR.
11. Click the down arrow beside the Operator field and select **OR** from the drop-down list then click the ellipses button beside the **Value** field.

    The Select Answers window opens.

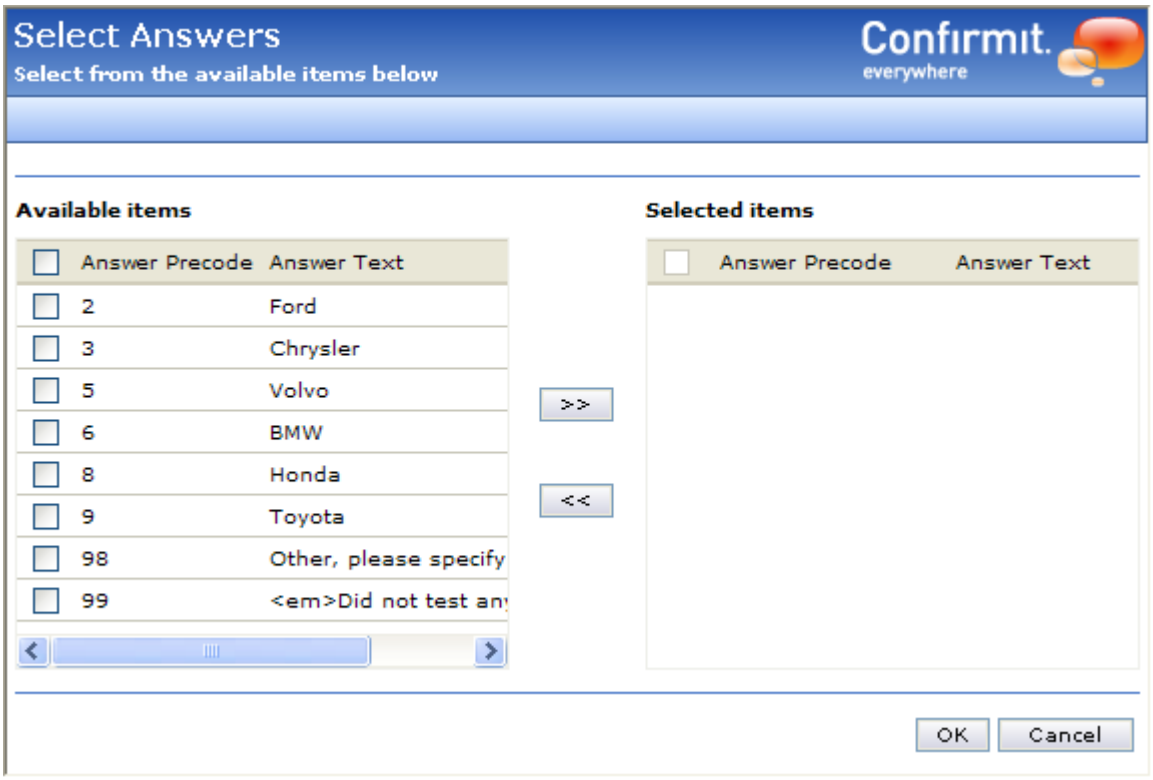


Figure 819 The Select Answers window for the carsTested element

12. We are looking for people who have test-driven BMW or Chrysler, so in the Available Items column select **3** and **6** then click the **>>** button.
13. Click **OK** to close the window.

    The expression should now look as shown below.

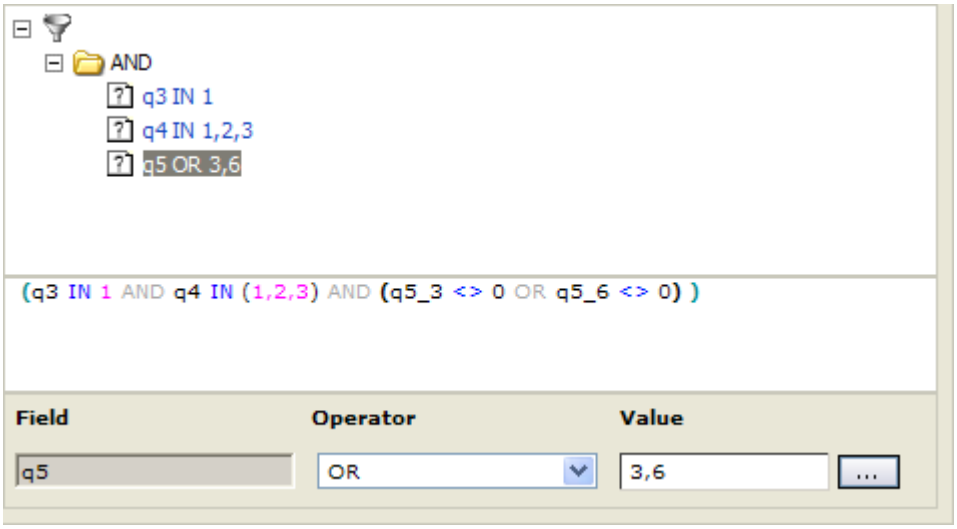


Figure 820 The resulting filter expression

All three questions in the filter are linked together using the AND operator. The two elements in carsTested are linked together using OR.

We now need to add in the second part of the filter.

14. In the Advanced Filter Designer window, drag the **OR** folder from Components and drop it inside the filter. Drop it on the text of the last element to insert it into the AND folder.
15. Drag the **Price** and **Safety** elements from the Qualities I grid question in the questionnaire and drop them into the **OR** folder.

    Note that you cannot drag the entire grid question into the filter. You must expand the question in the questionnaire by clicking on its icon, then drag the elements individually. The result should be as shown below.

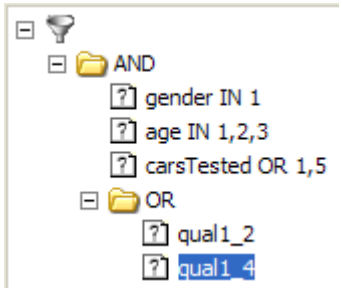


Figure 821 The filter with the qual1 elements

16. Click on the **qual1_2** element to activate the Expression Builder for that element, click the ellipses button to open the Select Answers window, and select the required answers (codes **4** and **5**).
17. Repeat for the **qual1_4** element.

    The result should be as shown below.

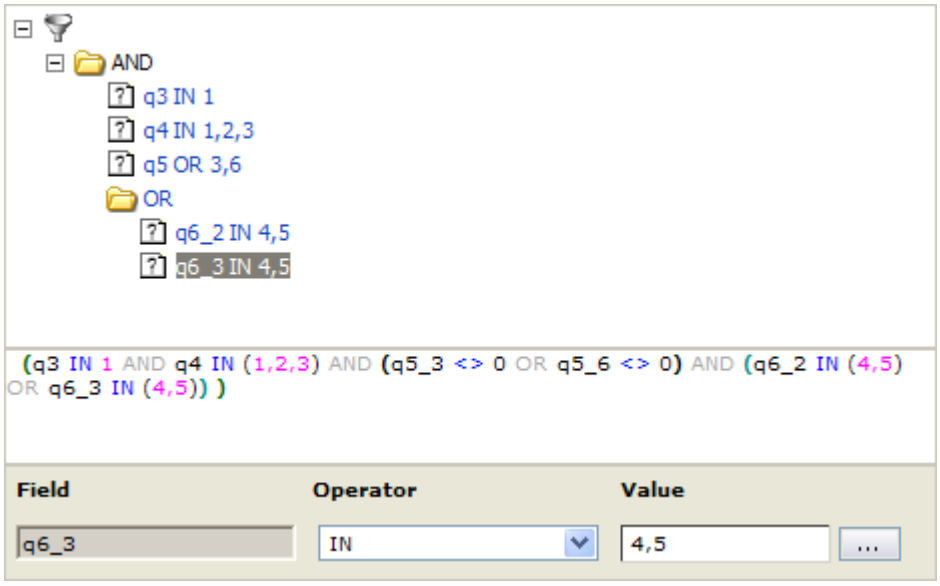


Figure 822 The final filter expression

The filter is now complete. Click **OK** to close the Advanced Filter Designer window.

24.2. Inverting the Logic

The logic in Advanced Filters can easily be inverted, both for the elements and the folders. Inverting the logic means inserting a NOT function onto the logic function to get the opposite result. You can also switch between AND and OR folders.

To invert the logic or switch between AND and OR, right-click on the folder and select the appropriate option from the drop-down menu.

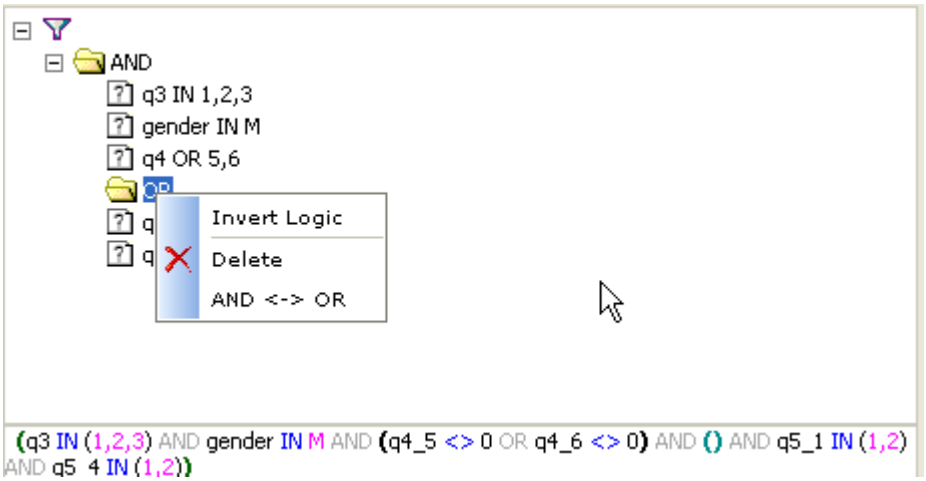


Figure 823 Inverting the logic or switching between AND and OR

24.3. Operators for Numeric Questions

When you define a filter on Open Text Numeric questions and Interview Start or Interview End items, the operators in the Expression Builder will be as follows:

- = - equal to
- <> - is not equal to
- < - less than
- > - greater than
- <= - less than or equal to
- >= - greater than or equal to

When you define a filter on an open text numeric question, you must enter the Value manually.

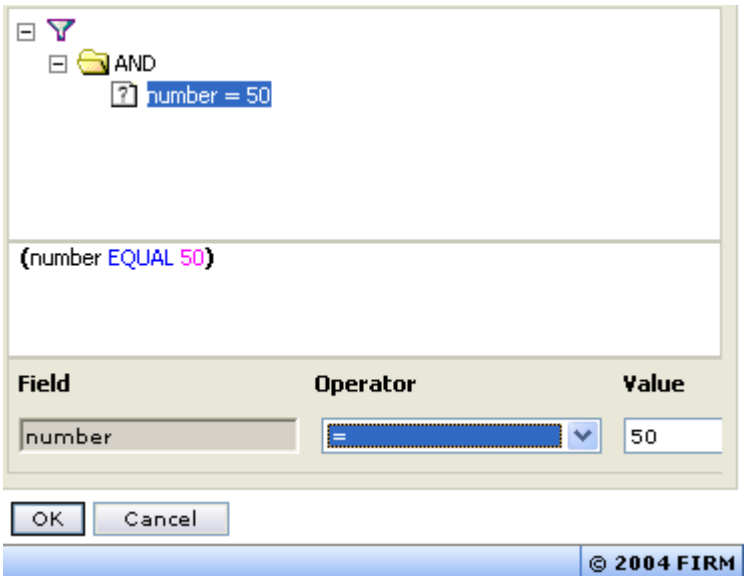


Figure 824 Defining a filter value for a numeric question

Multi Open Text Numeric questions must be expanded first, and the single items can then be dragged into the filter designer.

24.4. Operators for Interview Start and Interview End

For filters defined on Interview Start and Interview End, the operators are the same as for Numeric questions (see the previous section). In these filters a calendar button is available next to the Value field. To define the Value for the filter, click on the button and select a date from the pop-up calendar.

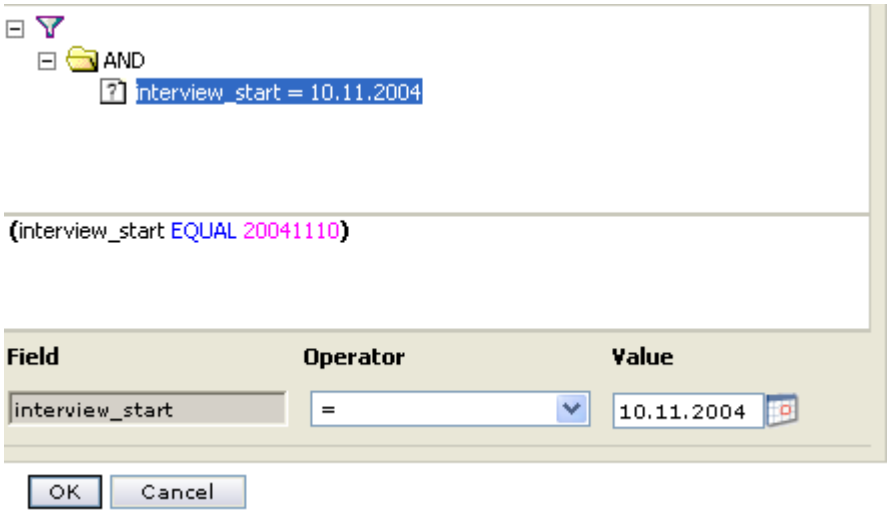


Figure 825 Defining a filter on interview start

25. Recoding Data

There may be a time when your questionnaire includes a question with many answer alternatives, that you wish to simplify for the report.

For example, you could have a Single question where you have asked the respondent to state his/her age. The answer options in this case could be the age groups "under 18", "18 to 30", "31 to 40", "41 to 50" etc, but you wish to report on the age groups "Up to 40" and "Over 40".

Regrouping the answers is called Recoding, and can be achieved in two ways;

- In Authoring, you can recode the answer options before sending the data to Reportal for inclusion in the report. This requires that the Confirmit designer (you) adds a special question to the questionnaire. This question is hidden from the respondent, and it takes the replies from the original question and collects the answers into the required groups .
- In Reportal, you can recode the data. This is the more flexible option because the Reportal designer has full access to the original data and can recode it as required. This procedure is described in the Reportal User Guide.

Note: The Variable Type of a Grid or 3D-Grid question cannot be set to "Recoded Variable". However, you can recode Grid data if you set up a question as a recoded variable and then recode the Grid question data into that recoded variable.

25.1. How to Recode a Question Using the Expression Builder

This section contains a step-by-step example of how you recode a single question using the Expression Builder functionality. The procedure for other types of questions is the same though the number of functions available in the Expression Builder may be different (see Functions Documented in the Expression Builder on page 758 for more information). Note that you can recode questions "manually" (see Recoding Questions Manually on page 755 for more information), but the Expression Builder guarantees correct syntax.

For this example, assume you have the following answers in your Age question:

- Under 18 (code 1)
- 18 to 30 (code 2)
- 31 to 40 (code 3)
- 41 to 50 (code 4)
- 51 to 60 (code 5)
- Over 60 (code 6)

as shown below.

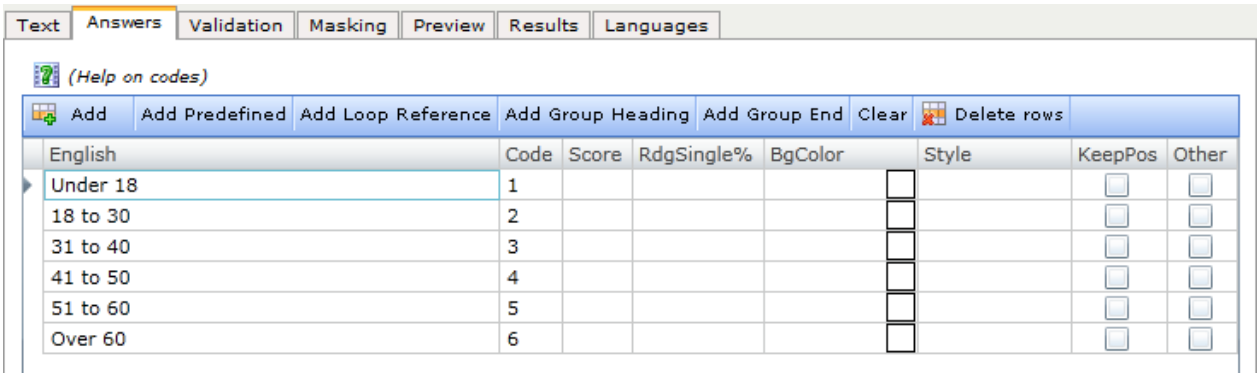


Figure 826 The answer options before recoding

And you would like to recode these to "**Up to 40**" (codes 1, 2 and 3) and "**Over 40**" (codes 4, 5 and 6).

To recode the question in Authoring:

1. Open the survey containing the question you wish to recode.
2. Add a Single question to the questionnaire, after the question you wish to recode, and give it a logical name.

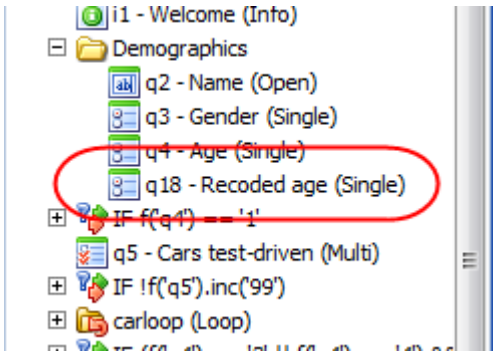


Figure 827 The new "Recoding" question in the questionnaire tree

3. Go to the question's Answers tab and add the answer alternatives **Up to 40** and **Over 40** to the question.

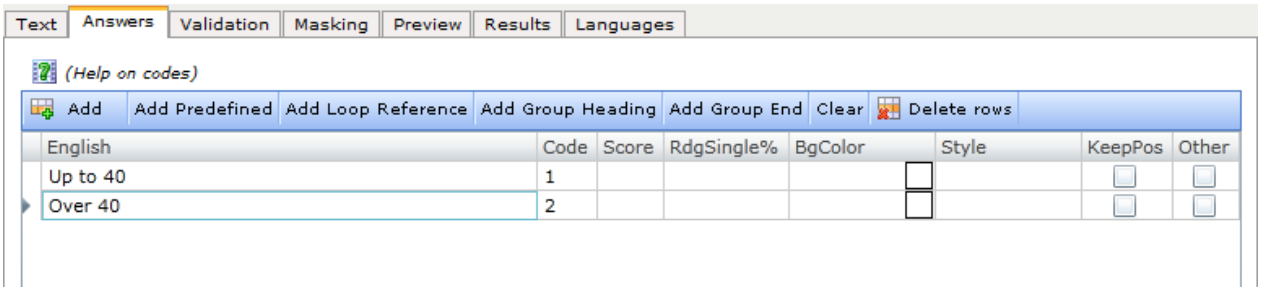


Figure 828 The answer alternatives for the recoding question

4. Open the question's Properties page, click **Show advanced view**, then click the down-arrow beside the Variable Type field and select the **Recoded variable** option from the list. See the note below.

Note: From Confirmit v16 you will no longer be able to launch a survey that includes legacy recoded variables. In the event you attempt to launch such a survey, a message will be displayed informing you of what you will need to do. It will still be possible to use existing surveys that include legacy recoded variables in Reportal and Data Exports, but it will not be possible to relaunch these surveys, or to calculate legacy recoded variables for any new respondents.

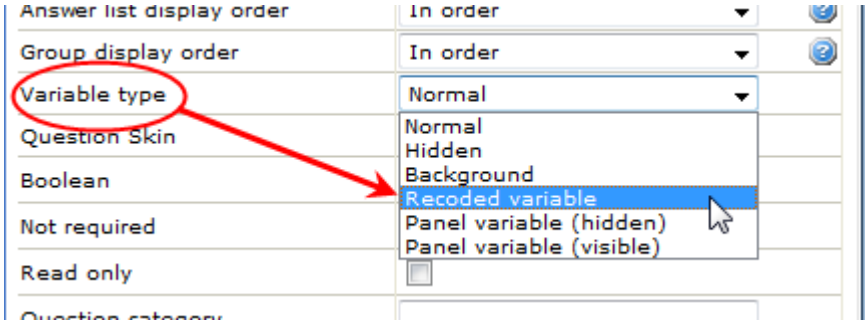


Figure 829 Selecting Recoded Variable

5. Save the changes.

   The options in the Properties pane change, several of the columns in the question's Answers list are removed and the Expression column appears.

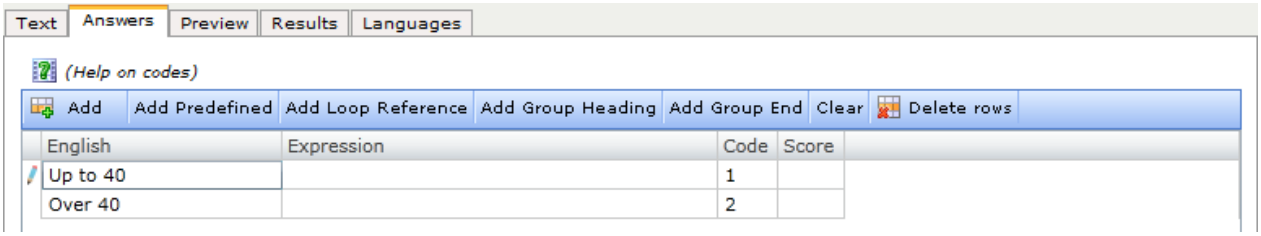


Figure 830 The Answers tab when Variable Type is set to Recodes Variable

You must now add expressions to the fields in the Expression column. These expressions must be programmed as Boolean, evaluating to true or false.

Note: When basing a variable on another specific question you can use the Expression Builder to assist you with creating the expressions.

6. Click in the Expression field for the first recoded answer, then click on the question in the questionnaire tree that you wish to recode (in this case the Age question).

Note: When creating an expression, you must select questions that are at the same "level" in the Questionnaire Tree. For example, if you are creating a recoded question within a loop, then you must select from the questions within that loop - you cannot select a question that is outside of that loop.

The Expression Builder opens below the Answers tab, containing the answer options from the question to be recoded..

The yellow **Click here...** button opens a new window with descriptions of all the functions available in the expression builder (see Functions Documented in the Expression Builder on page 758 for more information).

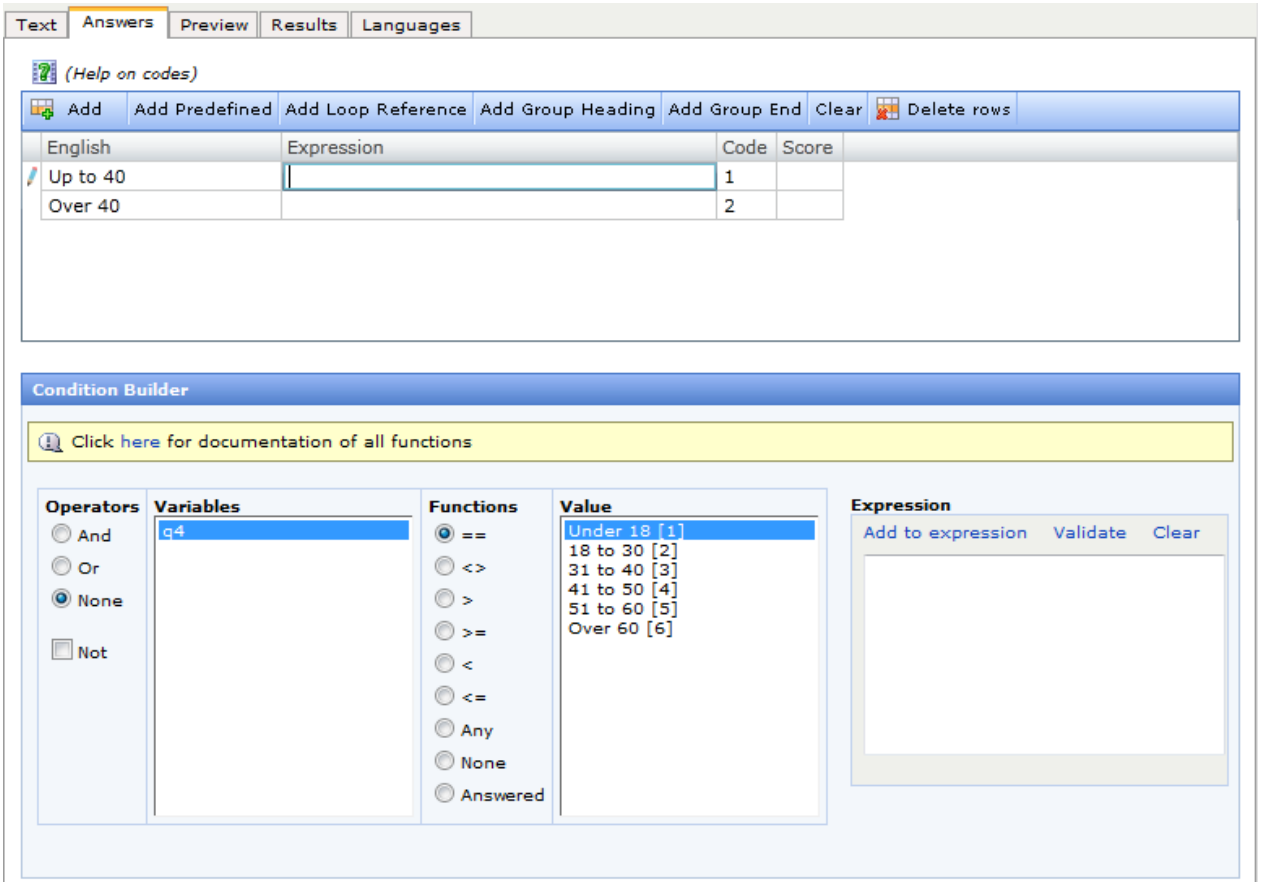


Figure 831 The Expression Builder below the Answers tab, with the age question and its answers displayed

7. Click in the "Up to 40" Expression field.

   In the Expression Builder, **age** is already selected. You now have several options for creating the expression:

   - For "Up to 40" you can say "if age is code 1 or if age is code 2 or if age is code 3", and similar for "Over 40".
   - For "Up to 40" you can say "if age is less than or equal to code 3" and for "Over 40", "if age is greater than or equal to code 4".

8. In this case, click into the "Up to 40" Expression field, then select **age = Under 18 [1]**and click **Add to expression**.
9. Select the **Or** operator, then select **age = 18 to 30 [2]**and again click **Add to expression**.
10. Repeat for the **31 to 40** value.

Note: If you notice a mistake before you have saved the changes, you can correct this by using the Delete or Backspace keys on you keyboard or by clicking the Clear button in the Expression field. On completion, click Validate to check that your result is correct.

The result should be:

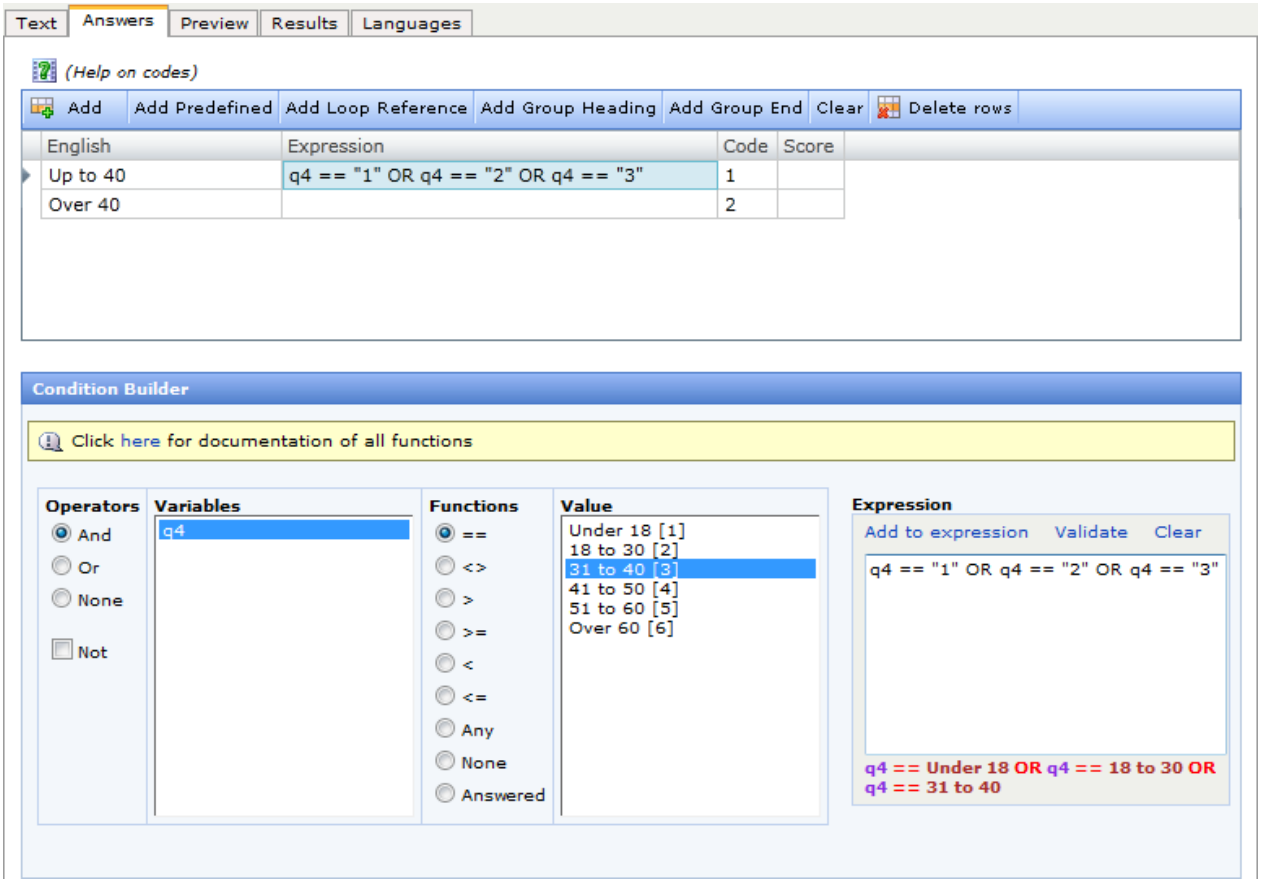


Figure 832 The result for the first part of the expression

11. Create the expression for the "Over 40" answer in the same way.
12. Save the changes.

    The final result should be:

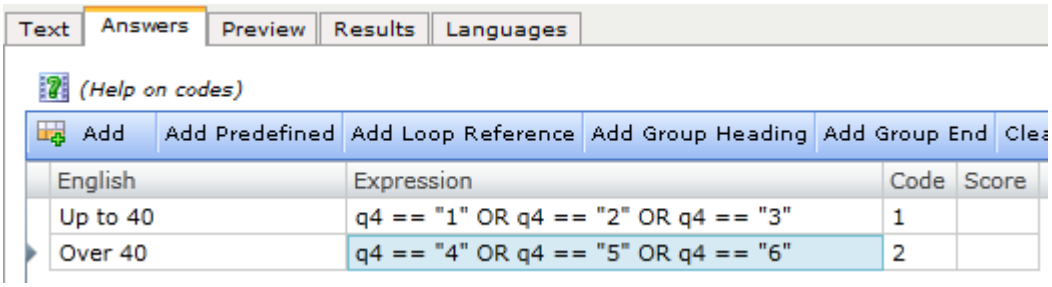


Figure 833 The resulting expressions

Note: In the event you find an error in an expression after you have saved, you can delete the expression by selecting the field in the Answers tab and clicking Clear.

Note: After adding a re-coded variable, you must always re-launch the survey using either the Incremental or the Rebuild option.

In addition to the forms in the questionnaire, you can also use the system-generated variables **interview_start**, **interview_end** and **status** in recoded variables.

25.2. Recoding Questions Manually

When recoding questions you can also create the syntax "manually". Note that in this case you should have some knowledge of the syntax and methods required, or the procedure could easily become time-consuming. You can build an expression for the recoded variable which follows the pattern:

```
variable = <expression>
```

where the expression can be of the form: `value [operator value]`. Two methods are available:

1. If the recoded variable is of Type Open Text or Open Text List, you can build an expression referring to an Open Text or Open Text List question.

   Example: q1 = q3 + q4 + "_text"

   In this case the recoded variable q1 will store the appended text of q3 and q4 (both Open Text variables) with an additional text appended.

2. If the recoded variable is of Type Numeric or Numeric List you can build an expression referring to a Numeric or Numeric List question.

   Example: q2 = q10 * q11

In this case the recoded variable q2 will store the calculated value of q10 * q11 (both Numeric variables). The operators that are allowed in this expression are (+)(-)(*)(/)(%).

25.3. Recalculating the Variables

The values in recoded variables are not updated automatically as response data is added to the questionnaire; the values must be calculated and updated as a specific operation. You can perform this task manually as required when respondents complete the survey, or you can set the variable calculation to run automatically as a recurring task.

Note: From Confirmit v16 you will no longer be able to launch a survey that includes legacy recoded variables. Existing surveys that include previously-calculated legacy recoded variables will still be available in Reportal, but it will not be possible to calculate values for new responses, or re-launch the survey as it is; you must convert the legacy recoded variables to new recoded variables **(see Conversion of Legacy Recoded Variables on page 756 for more information).**

1. Go to the **Reporting > Calculate Variables** menu command.

   The Calculate variables overlay opens.

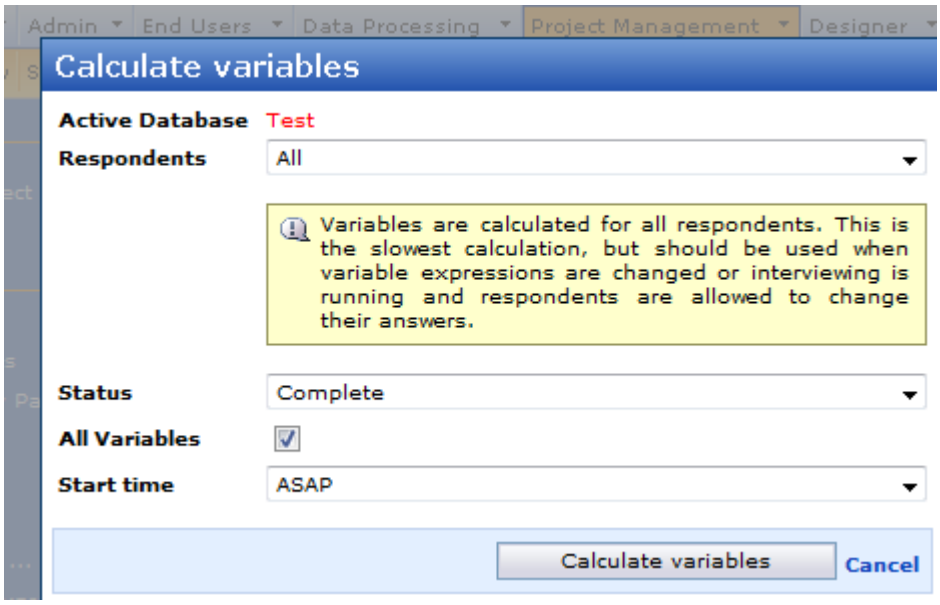


Figure 834 Calculating the Variables

The fields and options are as follows:

- **Active Database** - the currently selected database. Use the selection box in the lower right corner of the Confirmit window to change this as necessary.
- **Respondents** - choose whether you want to calculate variables for All respondents, Uncalculated respondents, or only New respondents.
- **Status** - choose whether you want to calculate variables for respondents with the status Complete, Incomplete or All.
- **All Variables** - if you do not wish to update all the variables, uncheck this box to open a text field where you can input the variables that are to be updated.
- **Start time** - select the start time for the batch job: **ASAP** or **Schedule for later execution**.

Make the appropriate settings and click **Calculate variables**. If you have selected Schedule for later execution, the Task Recurrence page then opens. In this case, make the settings as required and click **Save**.

25.4. Conversion of Legacy Recoded Variables

From Confirmit v16 you will no longer be able to launch a survey that includes legacy recoded variables. Existing surveys that include previously-calculated legacy recoded variables will still be available in Reportal, but it will not be possible to calculate values for new responses, or re-launch the survey as it is; you must convert the legacy recoded variables to new recoded variables.

A function is available in Confirmit that will attempt to convert legacy recoded variables into new recoded variables. It does this by converting the legacy expressions into expressions that are supported by the new functionality. If the conversion is successful, the legacy recoded variable will be changed to a new recoded variable containing the new expressions.

For legacy surveys, the function is available in the Questionnaire Tree toolbox.

1. Right-click on the survey root node (the first item in the Questionnaire Tree), then select Convert Legacy... from the right-click menu.

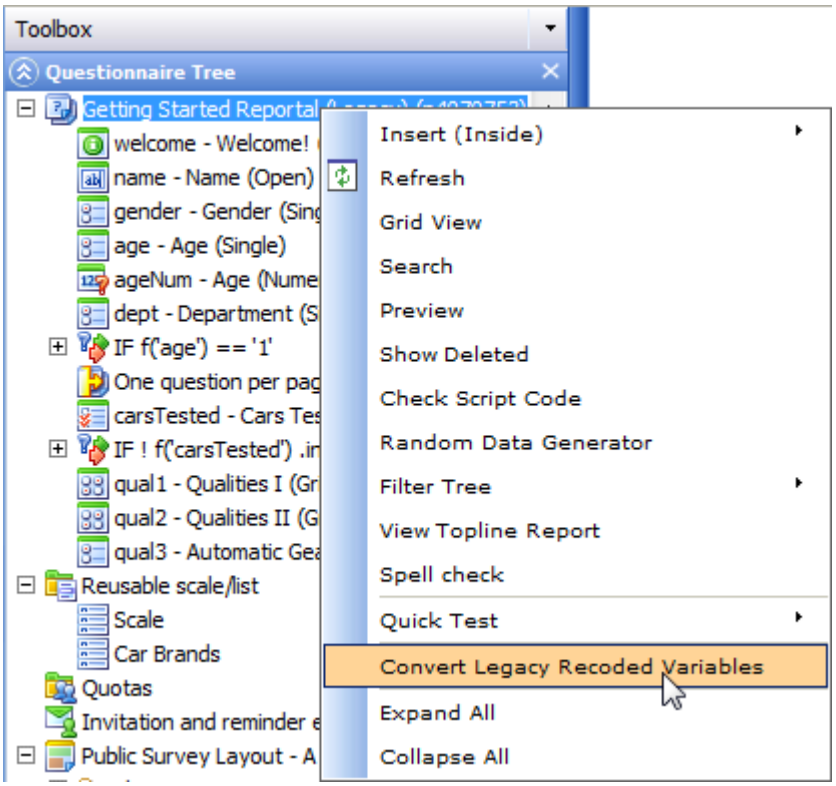


Figure 835 Selecting Convert Legacy Recoded Variables from the right-click menu

Confirmit analyzes the survey and locates any legacy recoded variables. An information/confirmation page is displayed, stating the number of legacy recoded variables found.

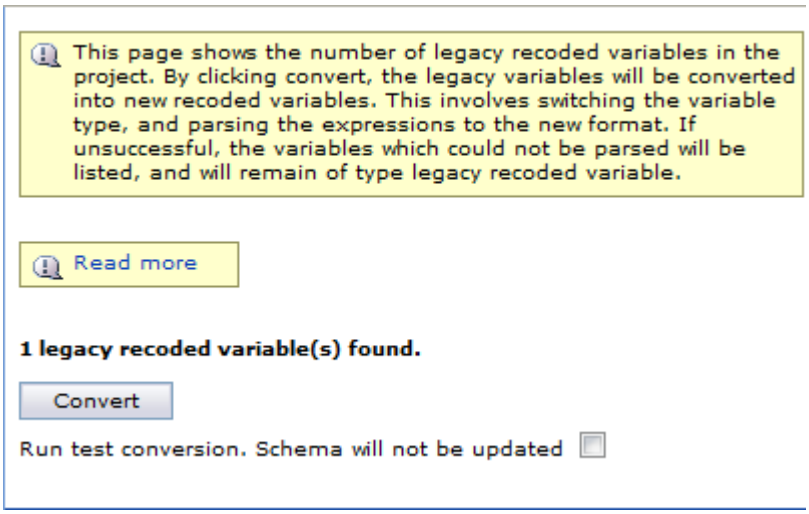


Figure 836 The information page stating how many legacy recoded variables were found

2. Click **Convert** to run the conversion process.

   On completion, the information page is updated to inform you of the result of the conversion process.

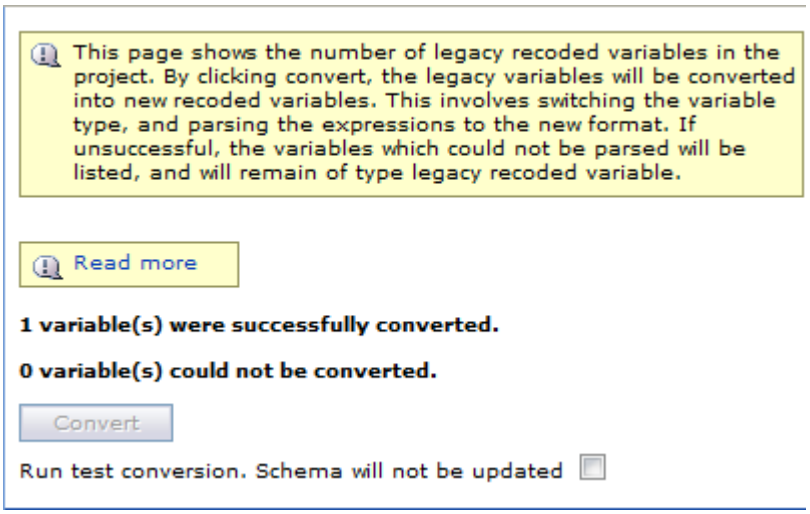


Figure 837 The result of the conversion process

Note: Some legacy recoded variables may remain un-converted. If so, this will be due to either erroneous expressions used in the legacy recoded variable, or complex expressions used in the variable which are not supported by the converter. You will then have to rebuild the recoded variables manually.

25.5. Functions Documented in the Expression Builder

When using the Expression Builder, you have access to descriptions of all the functions available. Click the **Click here for documentation...** button to open a new window containing the information.

The page contains a considerable amount of information, so it is divided into separate sections, for each main type of function. You can close down individual sections as required to reduce the amount of information presented. Click the "up-arrow" button in the title bar for a section to close that section. The button then changes to "down-arrow"; click that button to expand the section again.

25.5.1. Math Functions

Function	Return type	Description
Abs(double d)	double	Absolute value.
Average(double d1, double d2, ...)	double	Returns the average (arithmetic mean) of the arguments.
Ceil(double d)	double	The smallest integer greater than or equal to the specified number.
Floor(double d)	double	The greatest integer less than or equal to the specified number.
Round(double d, [int decimals])	double	Returns the number with the specified precision nearest the specified value. **Parameters** d - A number to be rounded. decimals - The number of significant fractional digits (precision) in the return value. Ranges from 0 to 28. **Return Value** The number nearest d with precision equal to decimals. If d is halfway between two numbers, one of which is even and the other odd, then the even number is returned. If the precision of d is less than decimals, then d is returned unchanged.

		Remarks The decimals parameter specifies the number of significant fractional digits in the return value and ranges from 0 to 28. If decimals is zero, then a whole number is returned.

25.5.2. Logical Functions

Function	Return type	Description
IIF(bool condition, expression1, expression2) IF(bool condition, expression1, expression2)	object	If condition evaluates to TRUE, expression1 is returned. If condition evaluates to FALSE, expression2 is returned. This function accepts any type for its second and third parameters as long as they are both of the same type.
Any(string questionID, string code, ...)	boolean	Returns true if respondent's answer has one of the values (equal to code).
All(string questionID, string code, ...)	boolean	Returns true if respondent's answer to the question contains all the selected codes.
None(string questionID, string code, ...)	boolean	Returns true if respondent's answer to the question does not contain all selected values.
Answered(string questionId)	boolean	Determines whether or not a respondent answered the selected question.
IsNull(string questionId)	boolean	Determines whether or not a respondent's answer is equal to null.
Between(double TestValue, double LowValue, double HighValue)	boolean	Determines whether the value of an expression lies between the values of two other expressions.

25.5.3. Text Functions

Function	Return type	Description
Left(string, int nCount)	string	Returns the first (leftmost) nCount characters from a string.
Right(string, int nCount)	string	Returns the last (rightmost) nCount characters from a string.
Len(string Text)	int	Returns the number of characters in the string.
Lower(string Text)	string	Converts all characters in a text string to lowercase.
Substring(string Text, int nFirst[, int nCount])	string	Returns a substring of length nCount characters from a string, starting at position nFirst (zero-based). If nCountequals 0 - will return string form the nFirst till end.
Substitute(string text, string oldText, string newText, bool isCaseSensitive)	string	Substitutes newText for oldText in a text string with case sensitive or not.

Trim(string Text)	string	Removes all occurrences of white space characters from the beginning and end of a string.
Upper(string Text)	string	Converts all characters in a text string to uppercase.
StartsWith(string Text, string startWithText)	boolean	Determines whether or not a text from the first parameter starts with the parameter value.
EndsWith(string Text, string endsWithText)	boolean	Determines whether or not a text from the first parameter ends with the parameter value.
Contains(string text, string innerText)	boolean	Determines whether or not a text from the first parameter contains the parameter value.

25.5.4. Date Functions

Function	Return type	Description
Now()	DateTime	Returns the current date and time according to the setting of your computer's system date and time.

DATEADD(string interval, double number, DateTime date)	DateTime	Number from 0 to 59, inclusive, representing the minute of the hour.
		
		Parameters
		interval - DateInterval enumeration value or string expression representing the time interval you want to add. The interval argument can have one of the settings listed here.
		yyyy - Year
		q - Quarter
		m - Month
		y - Day of year (same as Day)
		d - Day
		w - Weekday (same as Day)
		ww - Week
		h - Hour
		n - Minute
		s - Second
		
		Examples:
		// add 1 month to 31-jan-10
		DateAdd("m", 1, "31-Jan-10")
		// add one quarter to todays date
		DateAdd("q", 1, Now())
		
		number - The number of intervals you want to add. It can be positive (to get dates in the future) or negative (to get dates in the past). It can contain a fractional part when the interval specifies hours, minutes, or seconds. For other values of interval, any fractional part of the

		number is ignored. date - The date to which the interval is added.
DATEDIFF(string interval, DateTime date1, DateTime date2)	int	Returns the number of intervals between two dates. **Parameters** interval - DateInterval enumeration value or string expression representing the time interval you want to use as the unit of difference between date1 and date2. The interval argument can have one of the settings listed here. date1, date2 - Date expressions. Two dates you want to use in the calculation. **Remarks** If Date1 represents a later date and time than Date2, DATEDIFF returns a negative number.
DATEPART(string interval, DateTime date)	int	Returns an Integer value containing the specified component of a given Date value. **Parameters** interval - DateInterval enumeration value or string expression representing the part of the date/time value you want to return. The interval argument can have one of the settings listed here. date - Date expression you want to evaluate.
DATE(int year, int month, int day [, int hour, int minute, int second])	DateTime	A Date value representing a specified year, month, day, hour, minute, and second. **Parameters** year - The year (1 through 9999). month - The month (1 through 12). day - The day (1 through the number of days in month). hour - Optional. The hours (0 through 23). minute - Optional. The minutes (0 through 59). second - Optional. The seconds (0 through 59).

25.5.5. Date Intervals

Constant	Numeric value	String expression
dtYear	0	yyyy
dtQuarter	1	q
dtMonth	2	m
dtDayOfYaear	3	y
dtDay	4	d
dtWeekday	6	w
dtHour	7	h
dtMinute	8	n
dtSecond	9	s

25.5.6. Conversion Functions

Function	Return type	Description
ToDate(string Text)	DateTime	Create a DateTime from string.
ToInt(object Obj)	int	Convert object to integer.
ToFloat(object Obj)	float	Convert object to float.
ToDouble(object Obj)	double	Convert object to double.
ToString(object Obj)	string	Convert object to string.
ToBoolean(object Obj)	boolean	Convert object to boolean value.

25.5.7. Different Functions

Function	Return type	Description
Weights(string questionId, ...)	int	Returns the weights of answers of questions.
GetLookupId(string key, int schemaId, int relationId)	int	Returns a LookupId.
GetLookupLabel(string key, int schemaId, int relationId)	string	Returns a LookupLabel.

26. Administration of End Users

This chapter explains the End Users Administration interface functionality.

The administration interface controls the handling of Lists and Surveys, and defines how Companies, Users, Groups, and Reports are linked to them. End Users can view the reports, to which they have been given access via this interface, by entering the link to the End Users login page.

The administration interface is used in the CAPI/Kiosk application. See the CAPI manual for further information on this functionality.

Note: Lists, Companies, Groups and Users must be created in the correct order. You must have a List before you can create or add the other elements, and a Company must be created before you can enter Users.

Note: If you wish to use the Action Management or Active Dashboards functionality (refer to the User Guides for further details), you must first have an end user list so you can allocate the appropriate permissions to your end users.

The figure below visualizes the End Users administration interface:

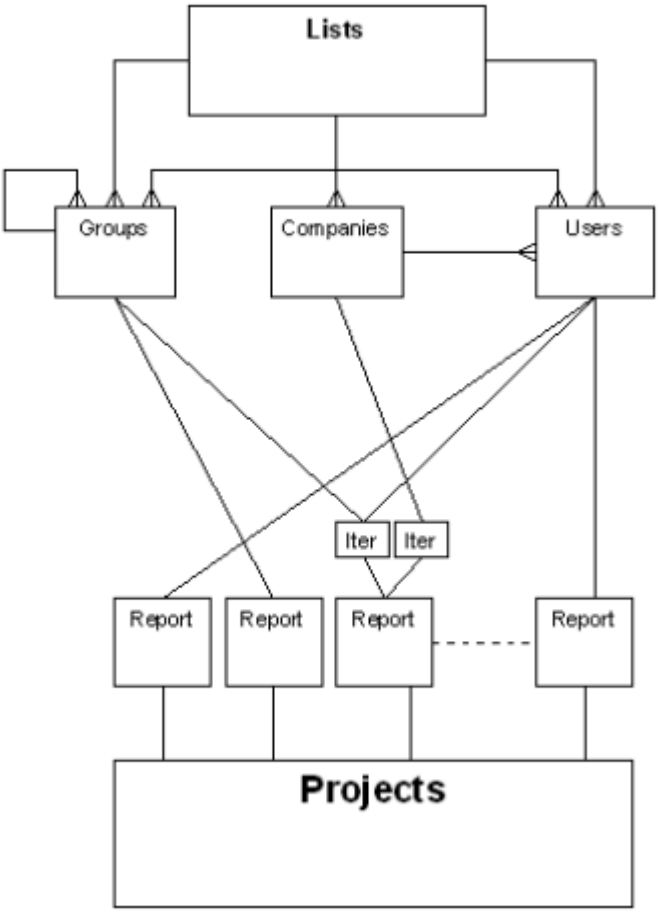


Figure 838 The End User administration interface layout

There are two “top” levels – Lists and Surveys.

Lists – one or more groups, companies and/or users are connected to a list.

- **Group -** a collection of Users and/or other Groups. Groups can be given access to reports and report iterations.

- **Companies -** companies can consist of one or more users.
- **Users -** users must belong to a company, so the appropriate company must be created first. A user can only belong to one company within a list. Users can be given access to reports and iterations.

Surveys – a survey will normally result in one or more reports. Users and/or groups of users can be allocated access to the reports and report iterations.

- **Outline Reports -** none, one or many reports can belong to a survey. A report can be connected to Groups, Users and Companies.
- **Iterations -** a report can be constructed such that different users are able to see different information depending on their access permission. These different versions of the report are called “Iterations”.

26.1. The General Procedure

The general procedure is as follows:

1. Create a list (see How to Create a New End User List on page 765 for more information).
2. In the list, create a company (see How to Add a New Company to a List on page 770 for more information).
3. Register end users in the company (see How to Add a New User to a List on page 771 for more information).
4. Collect end users into groups as required (see How to Add a User to a Group on page 780 for more information).
5. Register reports and report iterations.
6. Link reports and report iterations to companies, groups and end users.

26.2. The End Users Menu

When you enter a survey, the **End Users** menu appears in the menu bar. The **End Users** menu contains the following items:

- **Current List –** opens the currently selected list. If no list is selected, for example if you have just logged on to Confirmit, then all the lists you have access to are displayed.
- **Lists –** select to view all the lists that you have access to.

26.3. How to Access an End User List

1. Go to the **End Users > Lists** menu command.

   The End User List window opens as shown in the figure below.

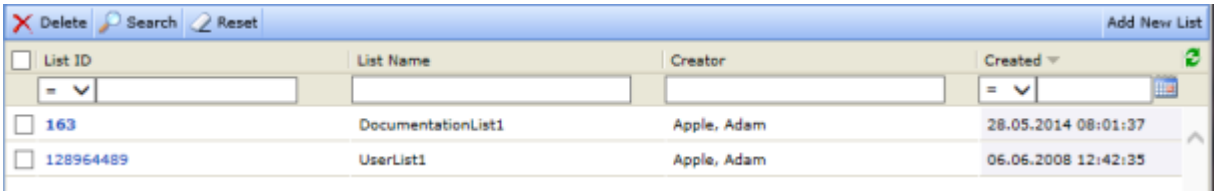


Figure 839 Example of the End User Lists window

This window displays the end user lists available to you. These end user lists may have been created by you, or you may have been given read and/or administration access to them by those who created them. The data columns and fields are as follows:

- **List ID –** the unique identification number for the End User List. This number is specified by Confirmit. When conducting a search, type a number into the field and select the appropriate operator.

- **List Name –** the name given to the list by the person who created it. When conducting a search, type the first few letters of the list's name into the field and click **Search**. The field is not case-sensitive.
- **Creator –** the user name of the person who created the list. When conducting a search, type the first few letters of the creator's name into the field and click **Search**. The field is not case-sensitive.
- **Created –** the date and time when the list was created. When conducting a search, select a date from the calendar and select the appropriate operator.

Each list has a checkbox at the left end of its row. Click on a row's checkbox to select that row for deletion. Click in the checkbox at the top of the column to select all the rows.

In the event the End User Lists window contains a large number of lists, use the search and filter functionality to more easily find the list you wish to work with. If you know the List ID of the list you are looking for, type it into the List ID field, select the appropriate operator, and click **Search** or press the **Enter** key on your keyboard. Click a letter in the bar at the bottom of the window to display only those lists for which the List Name starts with that letter.

2. To open a list, click on the identification number of the list you wish to work with (the blue link in the left column).

   The Update Current End User List window for that list opens at the **General** tab.

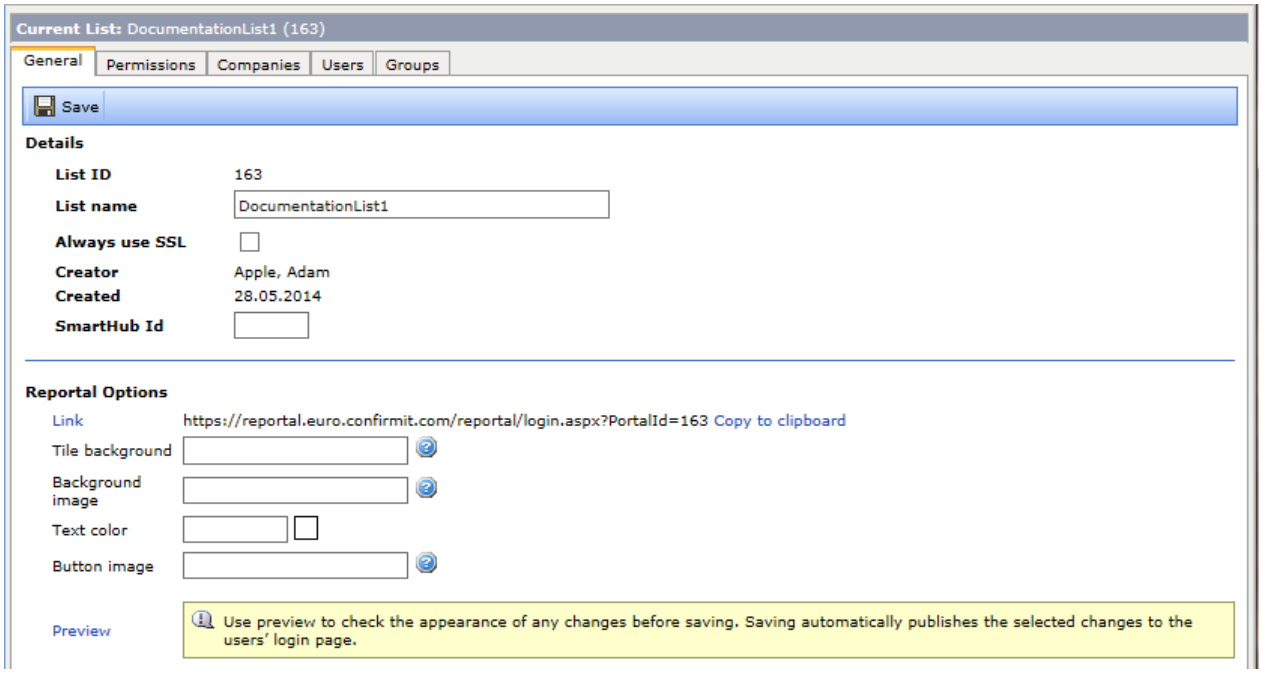


Figure 840 Example of the Update Current End User List window – General tab

26.4. How to Create a New End User List

A user must have the **System End User Access** permission to be able to create an end user list. Once the user has created an end user list, he/she can give permissions to other users to access and/or administrate the list. To create a new End User List:

1. Go to the **End Users > Lists** menu command.
2. Click the **Add New List** button located towards the right end of the End User Lists toolbar.

   The New End User List dialog opens.

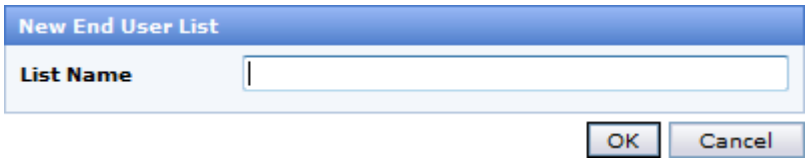


Figure 841 The New End User List dialog

3. Type the name of the new list into the List Name field.
4. Click **OK**.

   The End User List is created and the list editing window opens at the **General** tab. The list editing window enables you to set the user permissions for the selected End user List, create companies, users and groups, and assign reports to those. Note that a new "default" company with the same name as the list is automatically created and added to the list (visible in the Companies tab).

5. Make the appropriate settings and selections, then click **Save** to save the changes.

   The **Save** button will flash while Confirmit registers unsaved changes.

You can now add a company to a list (see How to Add a New Company to a List on page 770 for more information).

You can now add Users to a list (see How to Add a New User to a List on page 771 for more information).

26.5. The General Tab

The figure below shows an example of the End User List General tab.

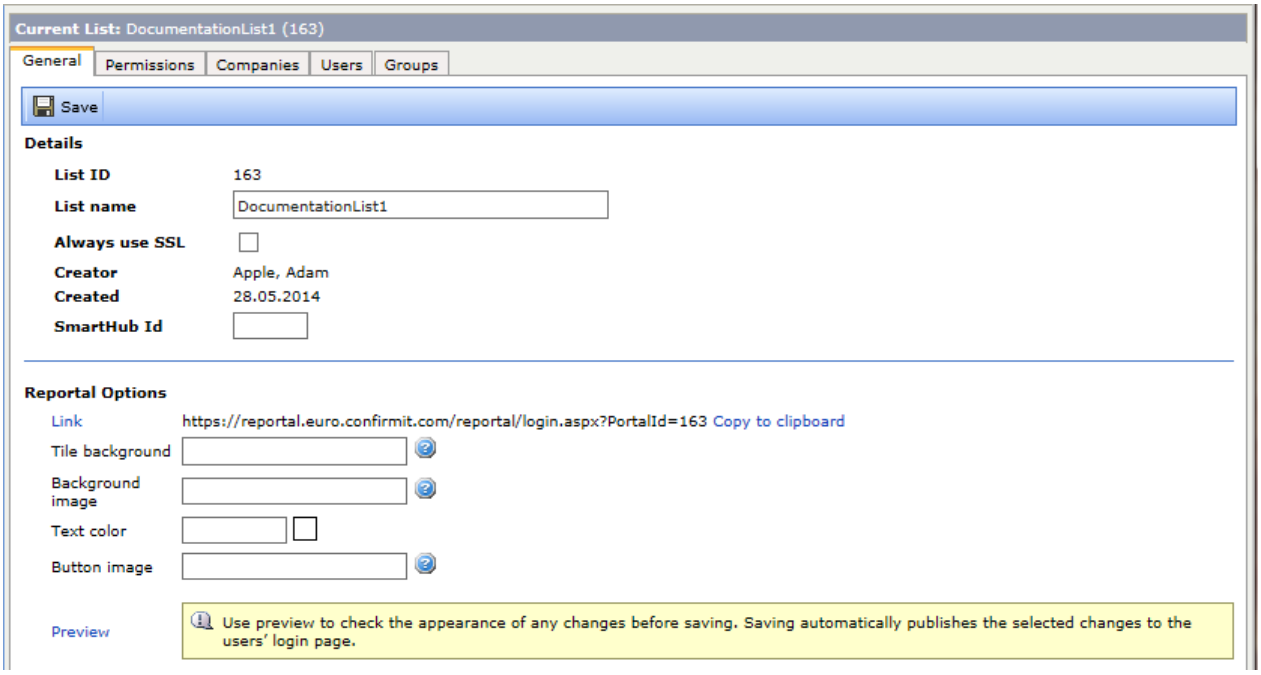


Figure 842 Example of the End User List window General tab

This window provides the following information:

- **List ID -** the list's identification number. This is created automatically by Confirmit when the list is created, and cannot be changed.
- **List Name –** the name of the currently selected list. Here you can edit the name of the list.

- **Always Use SSL –** check this box if you want this list to use the secure sockets layer (see HTTPS/HTTP on page 4 for more information).

Note: If "Always use SSL" is set for an end user list, hit list / single view links will be set to be https.

- **Creator –** the user name of the administrator who created the selected list. This cannot be changed.
- **Created –** the date the list was created. This cannot be changed.
- **SmartHub Id -** if you intend to use the Confirmit Action Management or Active Dashboards functionality (refer to the separate Action Management or Active Dashboards User Guides as appropriate for details), copy your SmartHub Id (refer to the separate SmartHub User Guide for details on where to find this) into this field. Then when you open Action Management or Active Dashboards and locate your SmartHub, this end user list will be available to you. Note that an end user list can only be associated with one SmartHub.
- **Link –** click to go to the Reportal log-in dialog. Here, once you have logged in, you will have access to Reportal to edit the report. You can also copy the link to the clipboard – see below.
- **Copy to clipboard –** click this to copy the link to your PC's clipboard. You can then paste the link into a document, email or web page for later use.
- **Tile background -** you can customize the Reportal log-in page for end users. In addition to specifying the image and font color, you can also change the background color. This is often achieved using an image, which is then tiled across the background screen. Enter the URL path to an image uploaded to the file library. Only images hosted in the file library can be used.
- **Background image -** you can add a customized background image for the Reportal log-in details area, such that Reportal end users see a customized log-in page. Enter the URL path to an image uploaded to the file library. Only images hosted in the file library can be used.
- **Text color -** you can set the text color for the Reportal log-in page. Type a color code into the field, or double-click on the sample square to open a color picker, then select a color.
- **Button image -** you can add an image to be used as the submit button image on the Reportal log-in page. Enter the URL path to an image uploaded to the file library. Only images hosted in the file library can be used.
- Click **Preview** to check the appearance of the log-in page for the end users.

Note: The majority of the details you provide here are displayed in the End User Lists window.

26.6. The Permissions Tab

The Permissions tab lists the Users in your own company, Groups and Other Users who are registered as administrators of end user lists with your company. These may for example be your colleagues in your company, or system administrators of client companies for which you are creating end user lists. Use this tab to give the other administrators administrative permissions to the list you have created.

Note: If you do not have Administrator permission in this tab, you will not be able to access it.

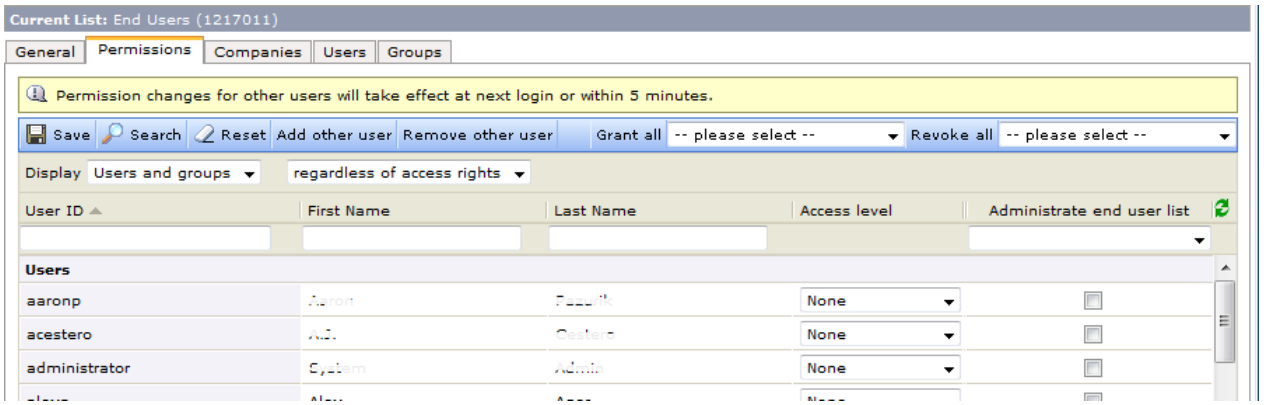


Figure 843 The End User List editing window – Permissions tab

The Permissions page lists a maximum of 50 users on the current page; click the **next/previous Page** buttons in the lower-right corner of the page to move between pages. Click a letter-button (along the lower edge of the page) to list only those users who's User ID starts with that letter. The list can be sorted on the User ID, First name and Last name columns; click the appropriate column header to toggle the sort order up or down on that column.

The buttons and columns are as follows:

- **Reset -** removes any search criteria you may have added and re-displays the entire list.
- **Add other user –** click to open a dialog that allows you to add users to the list.
- **Remove other user -** click to open a dialog that allows you to remove users that have previously been added.
- **Grant all -** select a permission from the drop-down beside this button and click the button to give that permission to all the currently listed users. Note that if you do not wish to give the selected permission to all users in your company then you must first conduct a search such that only the appropriate users are listed on the page.
- **Revoke all -** select a permission from the drop-down beside this button and click the button to remove that permission from all the currently listed users. Note that if you do not wish to remove the selected permission from all users in your company then you must first conduct a search such that only the appropriate users are listed on the page.
- **User ID** - the user id of the user (if entered in user settings in Confirmit) is listed in this column.
- **First Name / Last Name** - the registered name of the user. This can be changed by the user in the **Home > User > Settings** page.
- **Access level -** click the down-arrow beside a user's field to open a drop-down list of the levels, then select the appropriate level for that user. The options are:
    - **None -** the user does not have access to the end user list.
    - **Read** - the user has only Read permission, i.e. he/she can view the end user list but is not allowed to make any changes.
    - **Write** - the user has Write permission, i.e. he/she is allowed to add new end users and make changes to existing end user, but cannot delete existing end users.
    - **Delete** - the user has Delete permission, i.e. he/she has unrestricted access to make any desired changes to the end user list.
- **Administrate end user list –** check this box to give the person full administrative and editing rights to the companies, users, groups and reports that are linked to the selected list. The person will also then have access to the Permissions tab.

Once you have made the appropriate settings, click **Save** to save the changes.

26.6.1. Searching for End Users

In the event a large number of users are listed, type search criteria into one or more of the fields in the top row, and click **Search** or press the **Enter** key on your keyboard to reduce the list to a manageable size. For example, type **a** into the Last Name field and click **Search/Enter** to list only those users who's last name begins with A. The fields are not case-sensitive.

26.7. The Companies Tab

This tab lists the companies to which you have access for your user lists. The companies listed here will be those that you have registered, and any which other administrators have registered and for which you have been given access permission. Use the Companies tab to add new companies to the system and administrate companies that are already registered. Note that when you create a new End User list (see How to Create a New End User List on page 765 for more information), a new company with the same name as the list will automatically be created and added to the Companies list.

Click the blue Company ID link to open the properties tabs for that company. The properties tabs open at the General tab .

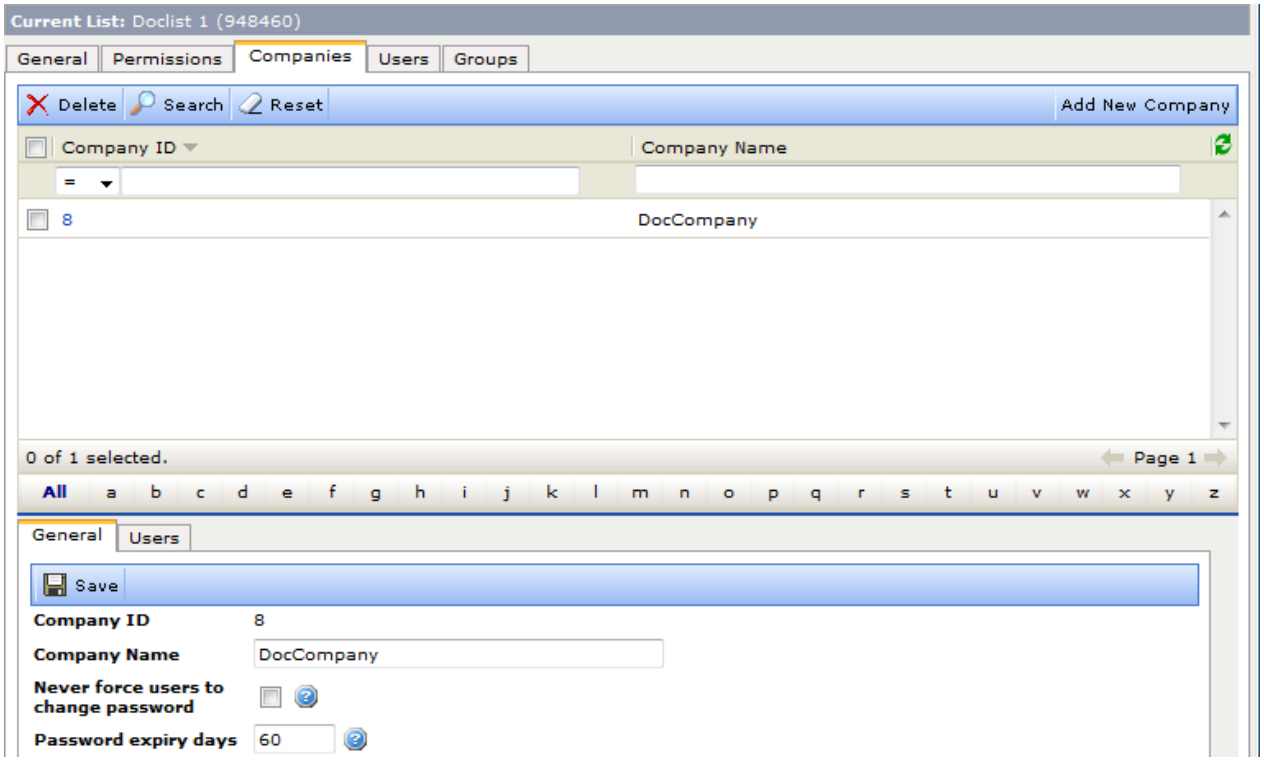


Figure 844 Example of the Companies tab

In this example, DocCompany has been selected in the upper area. The lower area's General tab shows the selected company's ID and name, and allows you to set an expiry date for the users' passwords for this list. By default there are three scenarios where a user is forced to change the password on login:

1. If the password has expired (according to the "Password Expiry Days" setting).
2. If an end user list administrator has reset the user's password.
3. On the first login for a new user.

- **Never force users to change password -** if this box is selected, the user will not be forced to change password in any of these scenarios.

- **Password expiry days -** if the Never force... box is not checked, set the number of days a password is to be valid before it must be changed.

Note: You must register a company before you can register users.

26.7.1. How to Add a New Company to a List

Note: You must select a list before you can add or edit companies.

1. Click the **Add New Company** button located towards the right end of the toolbar.

   The New End User Company dialog opens.

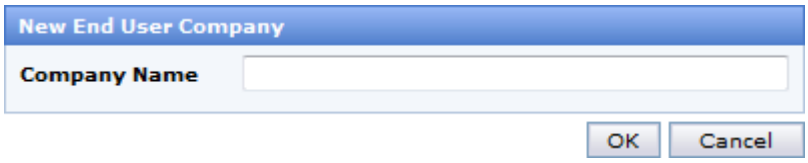


Figure 845 The New End User Company dialog

2. Type the name of the company into the Company Name field.
3. Click **OK**.

   The company is added to the list in the Companies tab. Confirmit gives the new company a unique Company Identification number. This Company Identification number is the access link to the company registration in Confirmit. Click the link to open the Details page for the company. Here you can edit the company name and view the users and reports that are attached to the company.

26.7.2. The Companies > Users Tab

This tab lists the users that are linked to the selected company.

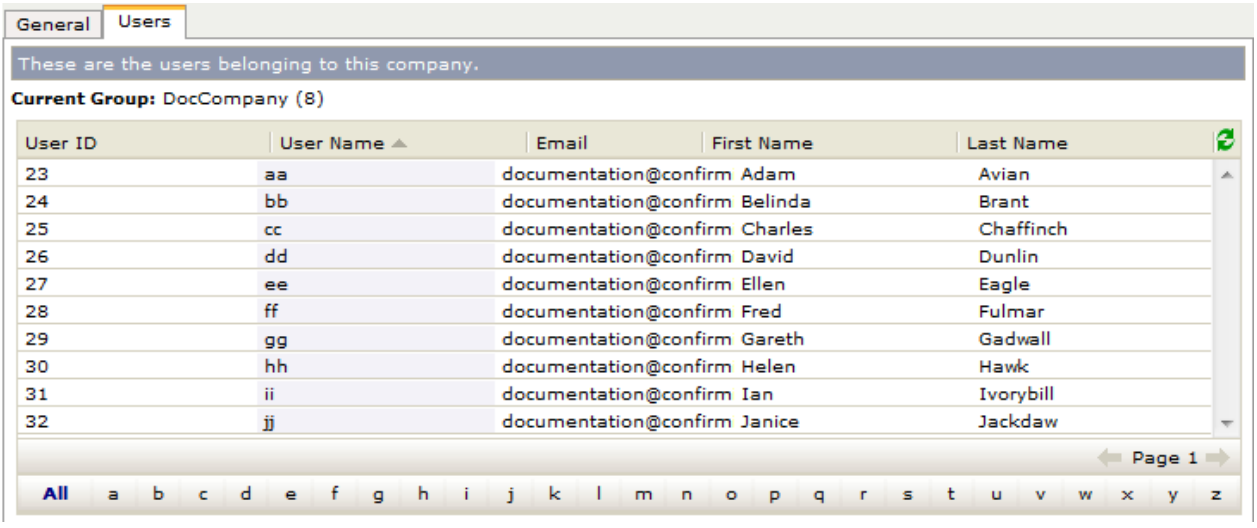


Figure 846 Example of the Companies > Users tab

To add users to the company, go to the Users tab in the upper area (see How to Add a New User to a List on page 771 for more information).

26.8. The Users Tab

Every person who is to be given permission to access published online reports must be registered in the system. They must be also be attached a company, so the company must be registered first. The Users tab lists all the end users for which you have administrative permission. The end users listed here will be those that you have registered, and any which other administrators have registered and for which you have been given access permission.

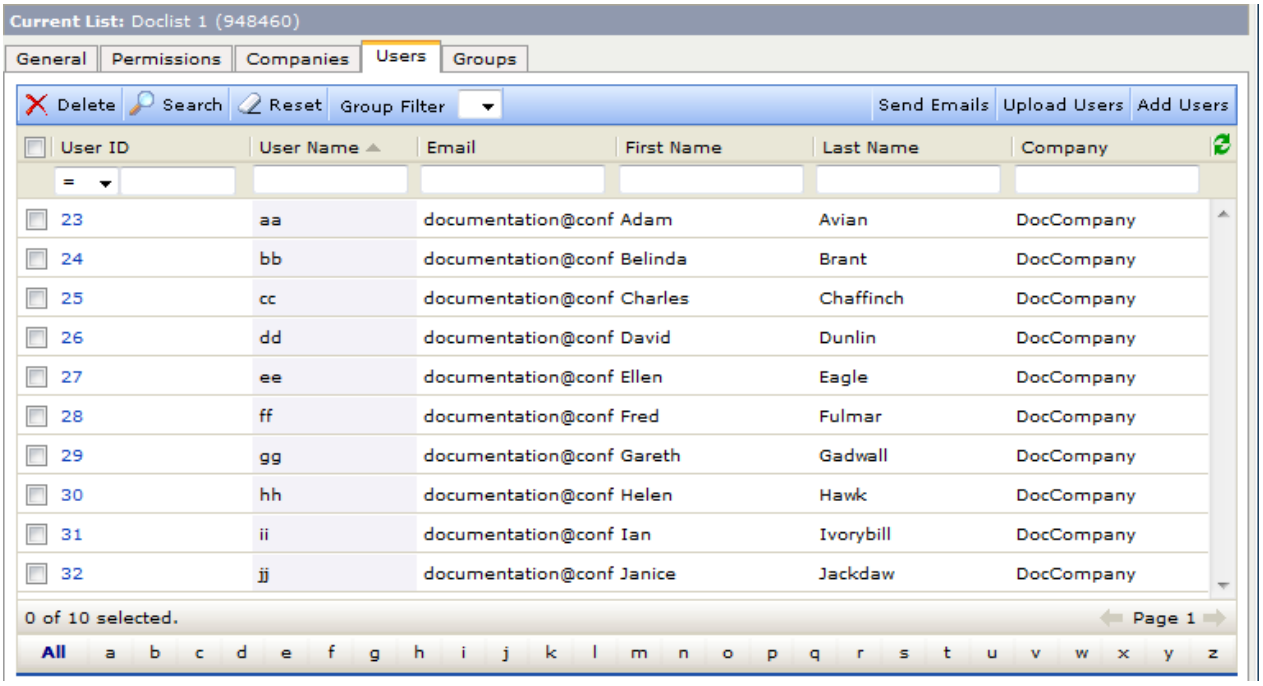


Figure 847 Example of the Users tab

26.8.1. How to Add a New User to a List

Note: Users must be attached to a company. You must therefore have a company registered, to which the user is to be attached, before you can add a user to a list.

1. Click the **Add Users** button located towards the right end of the window toolbar.

   The Add Users dialog opens in the lower part of the window.

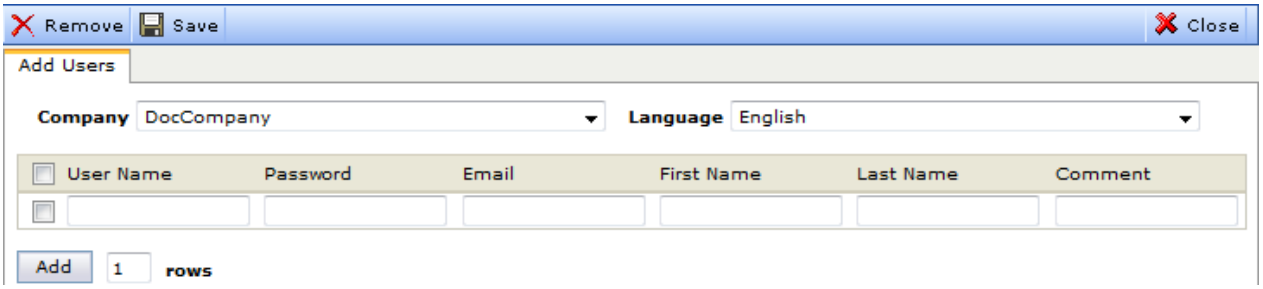


Figure 848 The Add Users dialog

2. In the Company field, select the company to which the user is to be attached.
3. In the Language field, select the language to be registered as the default language for the user.

Each user is assigned a default language. If a report to which the user is given access is created in that language, then the user will receive that version automatically. The user and/or the administrator may change the default language if required.

4. If you have a number of users to add, you can complete all their details in one page. Type the number of rows you wish to add to the list into the Rows field in the lower left corner of the window, then click **Add** to add the specified number of rows to the list.
5. Type the users User Name into the field. This is the name the user will type into the User Name field when logging in to view a report.
6. Type in a password for the user to use when he/she logs in to access the published online reports.

   The user can change their password when they have logged in, and you as the administrator can change a user's password if necessary (see How to Change an End User's Password on page 773 for more information).
7. Add the user's email address, first and last names, and any comments or notes. These will be visible in the user's Details page (see How to Edit the User Information on page 772 for more information).

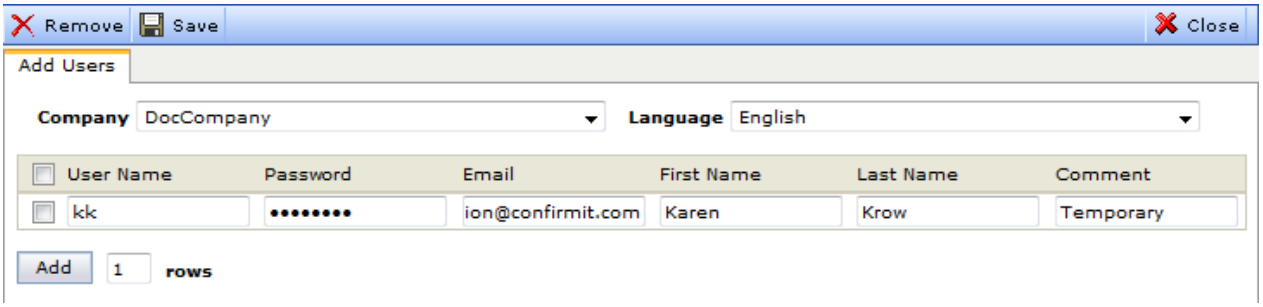


Figure 849 Example of a completed Add User dialog

8. Click **Save** to save the changes.

   The **Save** button will flash while Confirmit registers unsaved changes.

   When you click **Save**, the new user is added to the Users list in the upper part of the window. The new user is given a unique User ID number, and a note is made in the lower left corner of the window of the users you have added this session.

26.8.2. How to Edit the User Information

Click on a User ID link (the blue number at the left end of a user row) to open the Details page for that user. The page will open at the most recently used tab.

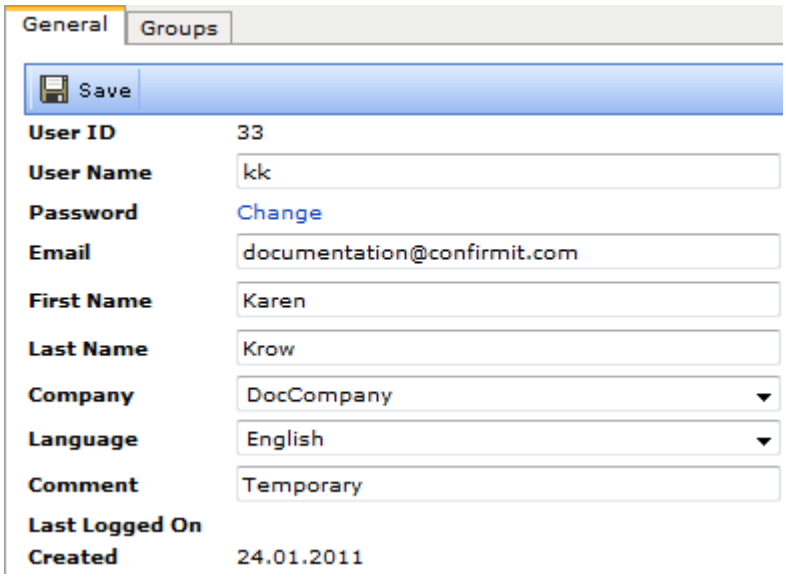


Figure 850 Example of a details page for a user

On the General tab you can change the user's password and edit the remaining information as required. Use the Groups tab to attach groups to the user (see How to Attach a Group to a User on page 773 for more information), and the Published Online Reports tab to give the user access to reports.

Note: You cannot change the user's user ID number or the date on which the user's registration was created in the system.

26.8.3. How to Change an End User's Password

End users each have their own user name and password. This is for security reasons, and is to ensure that Confirmit recognizes the user and makes available only those reports to which the user should have access. If an end user has forgotten his/her password (see Forgotten Password on page 18 for more information) or you need to change the password for any other reason:

1. In the Users list, click on the **User ID** link for the user in question.

   The Details page for that user opens in the lower part of the window.

2. Click the **Change** link.

   The Change Password dialog opens.

3. Type a new password into the New Password field, then confirm the password by re-typing it (see Password Policy on page 5 for more information).

4. Click **Save** to save the new password for that user.

26.8.4. The Users > Details Page > Groups Tab

Use this tab to link groups to a user. Any reports that are allocated to the user will then also be accessible to the users in the attached groups.

Note: The report "flow" is one-way. If a report is allocated to a user, it will also be accessible to any groups linked to that user. However, if a group which is linked to a user is allocated a report, only the members of the group will have access. Users to which the group is linked will not have access.

26.8.4.1. How to Attach a Group to a User

1. In the **End User List > Users** tab, click on a **User ID** number to open the details page for that user.

2. In the Details page, go to the **Groups** tab.

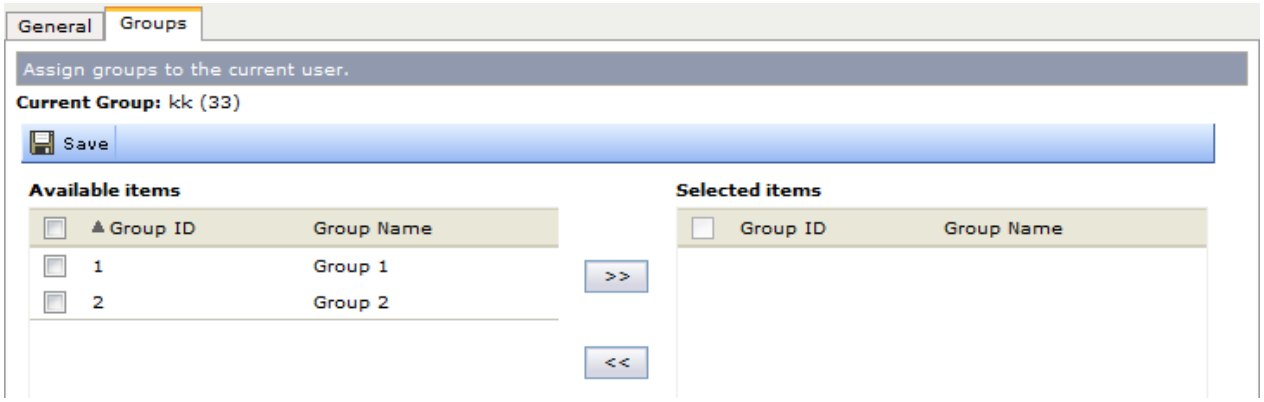


Figure 851 Example of a user's Details > Groups tab

3. In the Available Items column, check the box beside the group(s) you wish to link to the user.
4. Click the **>>** button to move the selected group(s) to the Selected Items column.
5. Save the changes.

26.8.4.2. How to Remove a Group from a User

1. Click on a **User ID** number on the **End User List > Users** tab to open the details page for that user.
2. In the Details page, go to the **Groups** tab.
3. In the Selected Items column, check the box beside the group(s) you wish to remove from the user.
4. Click the **<<** button to move the selected group(s) to the Available Items column.
5. Save the changes.

26.8.5. How to Upload a List of Users

Using the procedures described previously in this chapter you can register each end user individually into Confirmit. However, to save time, you can upload pre-created lists of end users.

Note: The company into which the end user list is to be uploaded must exist before you can commence the upload operation.

The end user list data file must be prepared as a tab-delimited text file, with column headings in the first row (the same as for respondent lists). This file can for example be exported from a spreadsheet application such as MS Excel by using the Save As function and choosing the format Text (Tab delimited - .txt). This data file would be prepared on the user's or another computer, and can subsequently be uploaded into Confirmit.

The end user data file must contain some or all of the columns listed below. Ensure the spelling of the column names is exactly the same as the names in the left column. The first four columns are required, the remainder are optional. These texts are case-sensitive.

Note: When your end user list is uploaded and displayed in the End Users list > Users tab on your screen, the first column is User ID. This is a reference number used by Confirmit to identify the user and it must be unique in the list. It is therefore generated automatically and consecutively by Confirmit when the list is uploaded, and it cannot be changed. The id that you create in the "userid" column in the table described below is mapped to the User Name column in the End Users list. This is "your" identifier for the specific user, and it can be edited as required.

Field/column name	Description	Required/Optional
userid	A unique user ID within the company that the user will be connected to. Maximum number of characters is 50.	Required
password	The user's password	Required
companyno	ID-number of the Company that the user will be attached to	Required
language	The default language for the user (see User Manual for language codes)	Required
firstname	User's first name	Optional
lastname	User's last name	Optional
email	The user's e-mail address	Optional
comment	Used for comments if needed	Optional

1. On the Users tab, click the **Upload Users** button located towards the right end of the Users tab toolbar.

   The Upload Settings dialog opens as shown in the figure below.

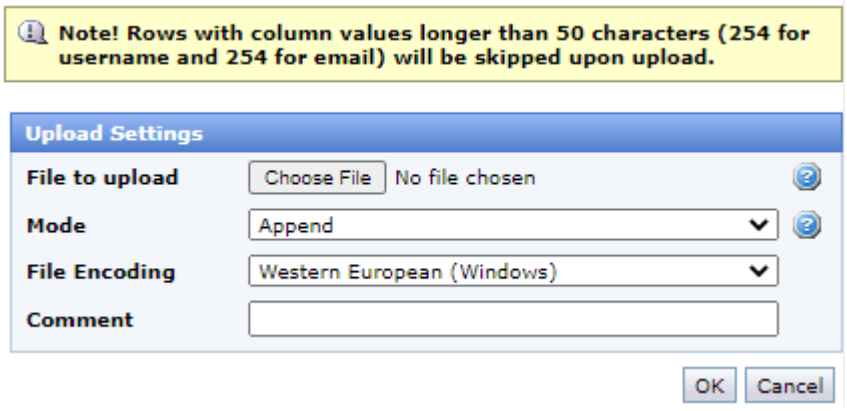


Figure 852 The Upload Settings dialog

The fields in the dialog are as follows:

- **File to upload** - browse to and select the file you wish to upload.
- **Mode –** do you wish to add the file to an existing list, delete any existing list and replace it with the new one, or update the existing data?
  - o **Overwrite Data** - allows new end users to be uploaded as well as replacing existing values. Not all end user fields are required in the file, but all specified, including blank data, will be replaced.
  - o **Append Data** - allows new end users to be added. All existing end user fields must be included in the uploaded file.

o **Update Data** - allows existing user fields to be modified. Note that not all columns are required for updating an end user, so only columns present in the uploaded file will be updated in this mode.

- **File Encoding –** select the character set used if the file is written using a code or language other than the default.
- **Comment** - type a comment as required into this field.

2. Click **Choose file** and browse to and select the file you wish to upload.
3. Select the remaining options as required and type any comments you may have concerning the file or upload operation into the Comment field.

   These comments will be readable in the task system.

4. Click **OK** to commence the upload task, or **Cancel** to abort and close the dialog.

26.8.5.1. Rules for Uploading

Confirmit uses a set of rules to decide if the file selected for uploading will be uploaded, and what is to be done in the event the data in the file is not correct. The upload operation will be stopped if:

- The file does not contain all the required field names in the first row.
- When appending new users, if the file contains rows with userids that already exist in the database.

The upload operation will not be stopped if:

- The file contains several rows with the same userid (duplicates will not be uploaded).
- The file contains rows with invalid company ids (they will not be uploaded).
- The file contains unknown field-names in the first row (they will be ignored).
- The order of the fields is different compared to the order of the fields listed in the previous section.

26.8.6. How to Send Emails to End Users

You can send end users their login details directly from Confirmit.

Note: When you create an email using this system, it will be sent to all users who are listed in the Users list at the time you click the Send Emails button. You must therefore reduce the list to only those to whom you wish to send the email, by adding search criteria to the data fields as appropriate, before you proceed with creating the email.

Important:
Confirmit passwords are encrypted in the system, so you cannot merely type a user's password into an email and send it to the user; when an attempt is made to use the password it will not be recognized. If you wish to send a password via email you must check the Include Login Information checkbox in the Email Properties dialog. Then, when the email is sent, the user's password is reset; the existing password is deleted from the system and a new password is created and added automatically to the email. The user can then use this password to create their own, which they will subsequently use to log into the system.

1. In the **End Users > Users** tab, ensure only those users to whom you wish to send the email are listed in the Users list.
2. Click the **Send Emails** button located in the window's toolbar.

   The Email Properties dialog opens as shown in the figure below. Use this dialog to write the subject and the body of the email and select the required options.

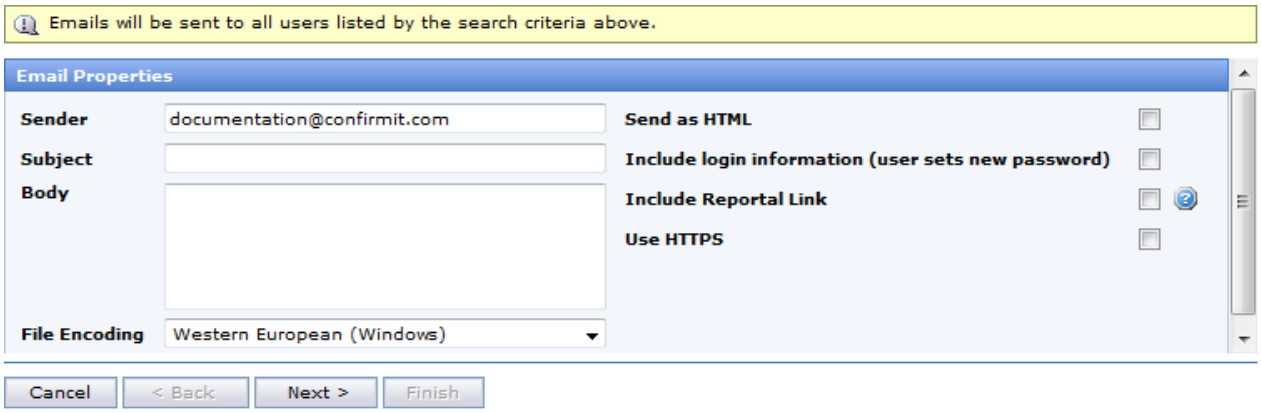


Figure 853 The Email Properties dialog

The fields and check-boxes in this dialog are as follows:

- **Sender –** the email address used to send the email. Any replies to the email will be sent to this address.
- **Subject –** the title subject of the email.
- **Body –** the main text of the email. Type your message in here.
- **File Encoding –** select the character set used if the email is written using a code or language other than the default.
- **Send as HTML –** the email can be sent as plain text or HTML. Check this box if you wish to use HTML.
- Check the **Include login info** checkbox to include the end user's userid, password and the Reportal portal ID in the email.

Note: If you check the "Include login info" box then the link added in the email will expire after one hour. After this time, the end users will need to click the Forgot password link and reset their password to be able to retrieve this information.

- **Include Reportal link** – check this box to include the link to Reportal in the email.
- **Use HTTPS –** check this box if you want this email to use the secure hypertext transport protocol.

3. Fill in the appropriate details and check the boxes to specify the format and any links that are to be included.
4. Click **Next** to proceed to the next page.

   The Email Preview page opens as shown in the example below. In the example, all the checkboxes have been selected. Note the following:

   o The Note above the email preview window informing you of how many emails will be sent.

   o The type of email to be sent (Plain Text or HTML) given in the left column.

   o The User ID and Password below the body text. The End User's actual User ID and Password will be copied in to the email for each user when the email is sent.

   o The link information included below the body text.

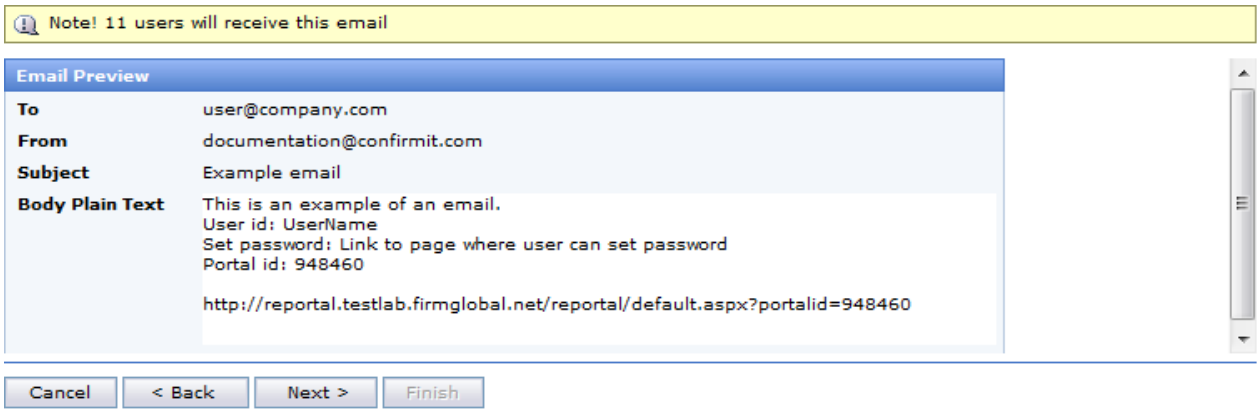


Figure 854 Example of the Email Preview page

5. Preview the email and check that it is correct.

   You can go back and modify the email if necessary.

6. Click **Next** to proceed to the next page.

The Task Properties dialog opens. Here you set when you want the email to be sent.

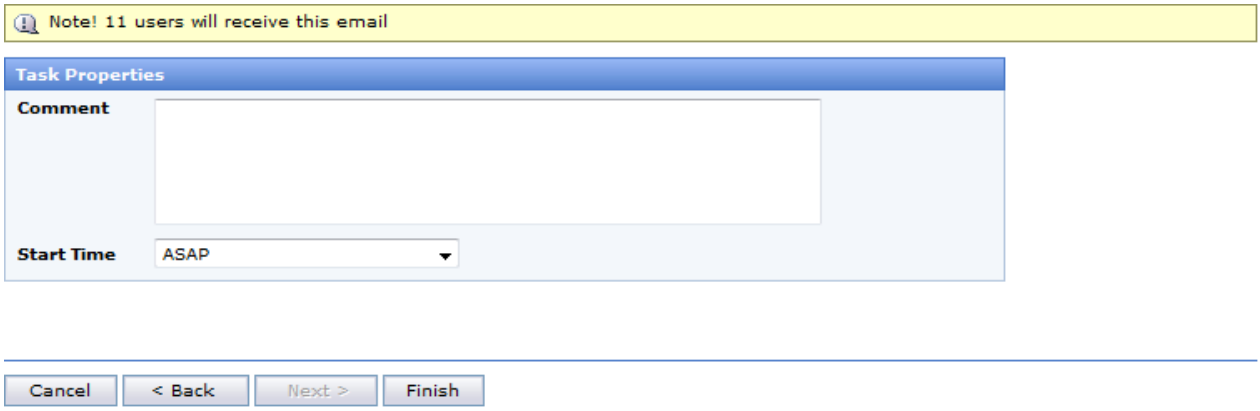


Figure 855 The Task Properties dialog

- **ASAP –** sends the email at the first available opportunity (as soon as the server is ready).
- **Schedule for later execution –** enables you to set up a date and time for when the email is to be sent.

7. Click **Finish** to send the email (or register it for sending at the scheduled time).

26.8.6.1. Scheduling an Email for Later Execution

If you have selected **Schedule for later execution** in the **Task Properties > Start Time** field, then when you click **Finish** the Recurrence Pattern dialog opens.

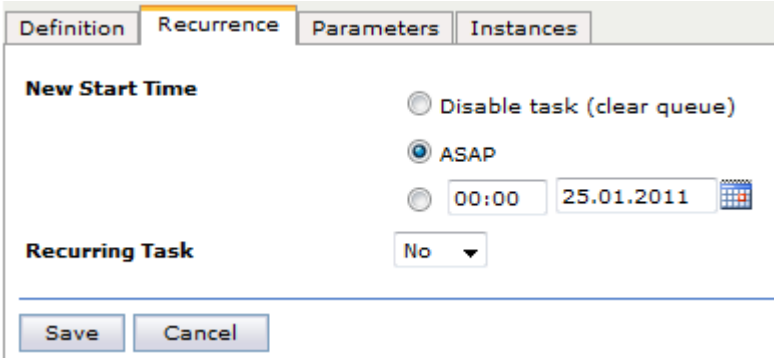


Figure 856 The Recurrence Pattern dialog

Use the options in this dialog to set the date and time for when you wish the email to be sent. If you wish the email to be sent as a recurring task, Select **Yes** in the Recurring Task field. This opens a number of additional options enabling you to set the recurrence pattern and the date of the final transmission. When you have made the settings as required, click **Save**.

The other tabs in this dialog provide system properties and tasking information.

26.9. The Groups Tab

A company may have a large number of employees, and these employees may be organized into different divisions within the company. For example, some may be in Development, some in Management, some in Sales and some in Production. The employees in the various divisions will need access to different reports, and all the employees in a division may well need access to the same reports. Therefore once you have registered the employees in the company into Confirmit, you can simplify the handling process by gathering users together into groups. Then, when you wish to allocate a report to a particular set of users, you only have to allocate it to a group instead of to a number of individuals.

The Groups tab lists all the Groups for which you have administrative permission. The Groups listed here will be those that you have registered, and any which other administrators have registered and for which you have been given access permission.

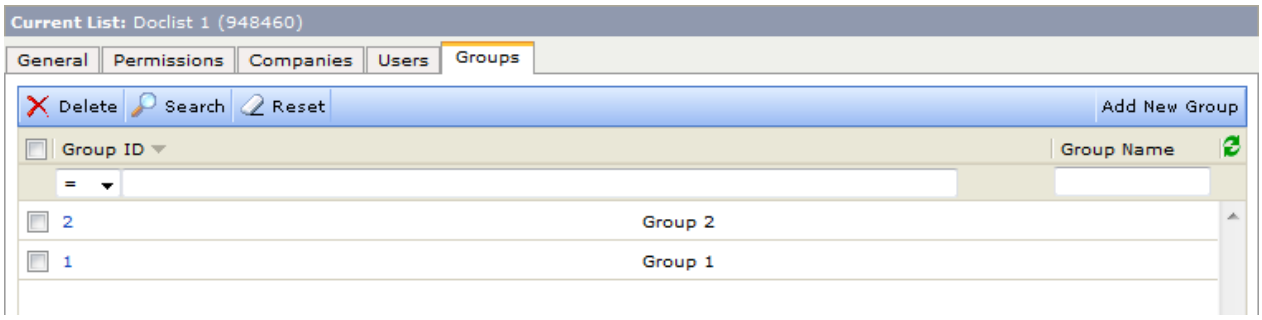


Figure 857 Example of the Groups tab

Groups may contain users from more than one company, and a user may belong to more than one group.

Note: The report "flow" is one-way. If a report is allocated to a group then all the users in that group have access to the report. However, if a user in the group is allocated a report, only that user has access, not the other members of the group.

26.9.1. How to Add a New Group to the List

1. In the **End Users > Groups** tab, click the **Add New Group** button located at the right end of the toolbar.

The New End User Group dialog opens in the lower part of the window.

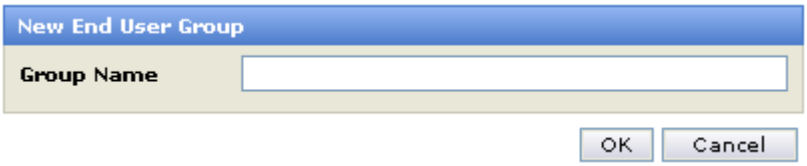


Figure 858 The New End User Group dialog

2. Type the group name into the field.
3. Click **OK**.

   The new group is added to the list in the upper part of the window. Confirmit gives the new group a unique Group ID number. Click on this number to open the details page for the group.

26.9.2. The Groups Details Page

Click on a Group ID number to open the details page for the group. This page contains four tabs:

- **General –** here you can edit the name of the group.
- **Users –** use this tab to add users to the group (see How to Add a New User to a List on page 771 for more information).
- **Groups –** use this tab to add groups to the group (see How to Add a New Group to the List on page 779 for more information).
- **Published Online Reports –** use this tab to add published online reports to the group.

26.9.2.1. How to Add a User to a Group

1. On the **End Users > Groups** tab, click on the Group ID of the group to which you wish to add a user.

   The Details page for that group opens in the lower part of the window.

2. In the Details page, go to the **Users** tab.

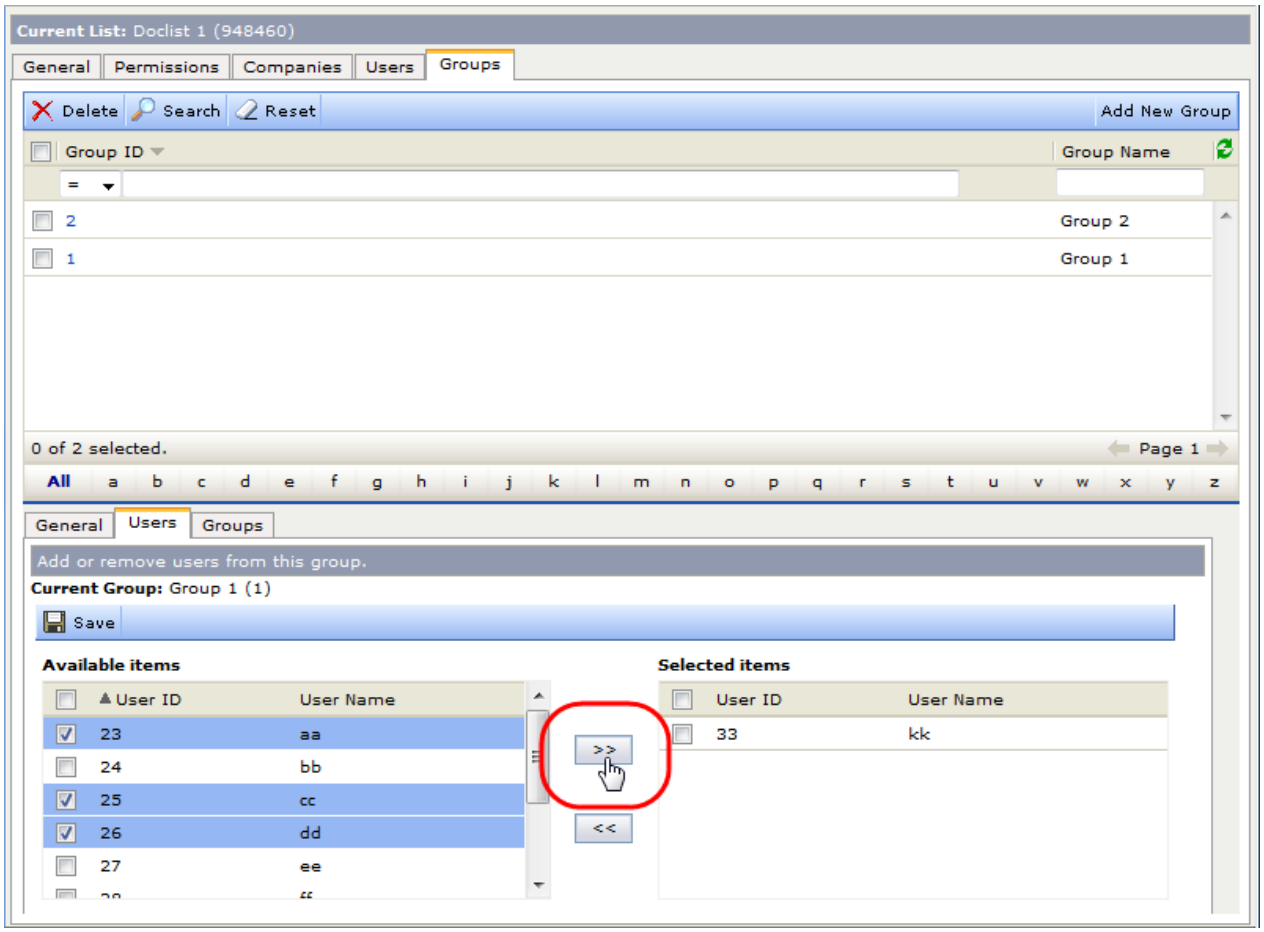


Figure 859 Example of the Groups > Users tab

3. In the **Available Items** column, click in the checkbox beside the user who you wish to add to the group.
4. Click the **>>** button to move that user to the **Selected Items** column.
5. Repeat as necessary for other users. Note that you can select as many users as required in one operation.
6. Click **Save** to save the changes.

   The **Save** button flashes while Confirmit registers unsaved changes.

26.9.2.2. How to Remove a User from a Group

1. On the **End Users > Groups** tab, click on the Group ID of the group from which you wish to remove a user.

   The Details page for that group opens in the lower part of the window.
2. In the Details page, go to the **Users** tab.
3. In the **Selected Items** column, click in the checkbox beside the user who you wish to remove from the group.

   The selected user is highlighted and struck-through.

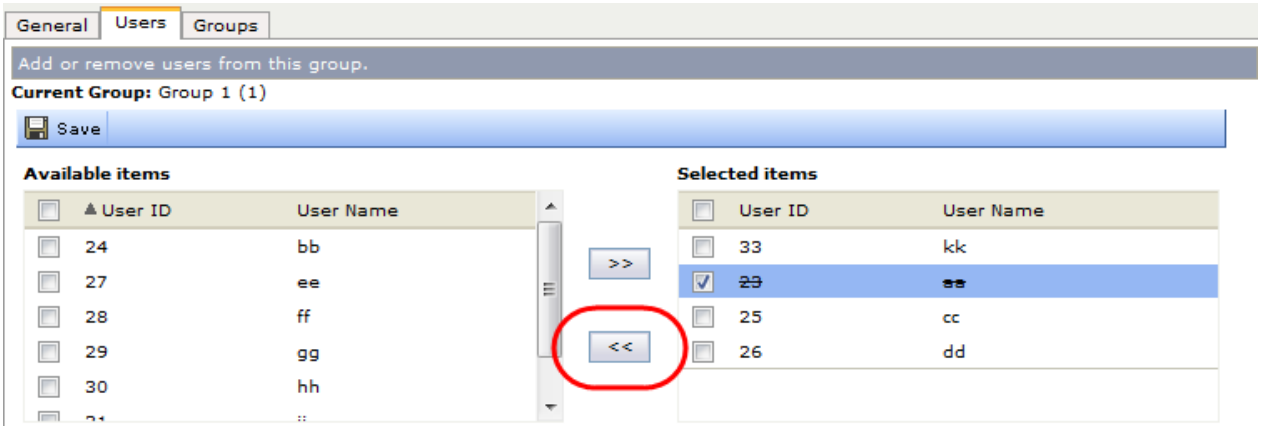


Figure 860 Removing users from a Group

4. Click the **<<** button to move that user to the **Available Items** column.
5. Repeat as necessary for other users. Note that you can select as many users as required in one operation.
6. Click **Save** to save the changes.

   The **Save** button flashes while Confirmit registers unsaved changes.

26.9.2.3. How to Link a Group to a Group

You can link one group to another group. If you link Group A into Group B, then if Group B is allocated a report, the users in Group A will also have access. Any group can be added to any number of other groups.

Note: The report "flow" is one-way. If Group A is linked in to Group B, then Group A will have access to any reports that are allocated to Group B. However, Group B will not have access to reports allocated to Group A. For this to occur, Group B must also be linked in to Group A.

To link one group into another group:

1. In the Current List Groups tab (the upper tab), click on the **Group ID** of the "host" group to which you wish to add another group.

   The Groups Details page opens in the lower part of the window.

2. In the Details page, select the **Groups** tab.

   This tab lists the remaining groups registered in the company, and enables you to add groups to the selected group.

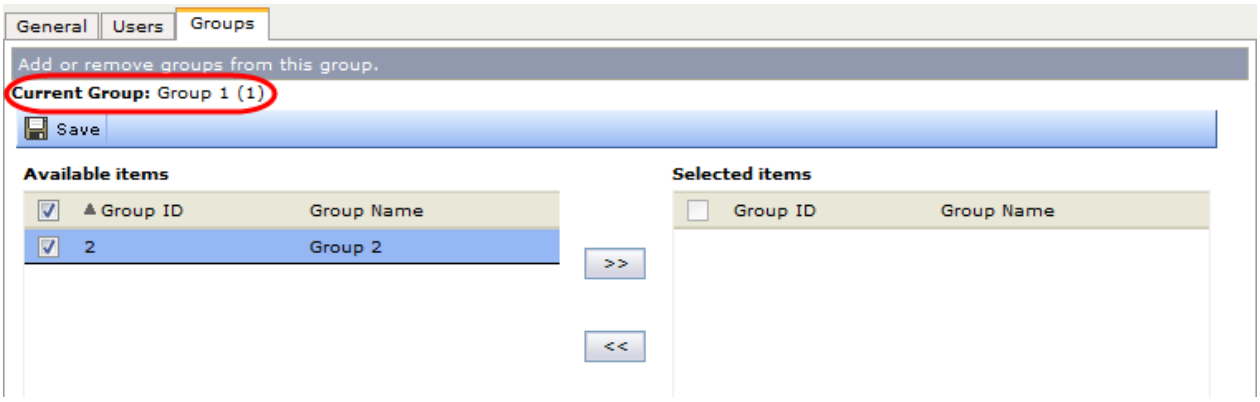


Figure 861 Example of the Groups tab for a group

In the figure, the company has two groups. Group 1 is selected as the Current Group, and the remaining group is listed below, available to be linked into Group 1.

3. In the **Available Items** column, click in the checkbox for the group you wish to add to the current group to select it, then click the **>>** button to move the selected group to the **Selected Items** column.
4. Save the changes.

A report allocated to the current group will now be accessible to all the users listed on the current group's Details page > Users tab, and it will also be available to all the users attached to the group you have just linked into the current group.

27. Survey Data

The Survey Data menu contains the functionality for importing, exporting, editing and deleting survey data, and for coding open text responses (see The Online Coding Tool on page 658 for more information).

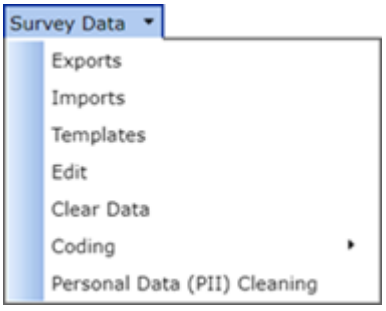


Figure 862 The Survey Data menu

27.1. Clear Data

The **Clear Data** menu command allows you to delete the survey data in the active database, and the respondent list if so desired. This means that if you have for example tested a survey in production mode with a number of fictitious respondents, before you go live you can remove the test respondents and their responses so the test data does not contaminate the "real" data.

Warning:
This action will delete all responses and respondent data from the database and CANNOT be undone. Be absolutely certain that this is what you wish to do.

1. Go to the **Survey Data > Clear Data** menu command.

   The Clearing Data overlay opens.

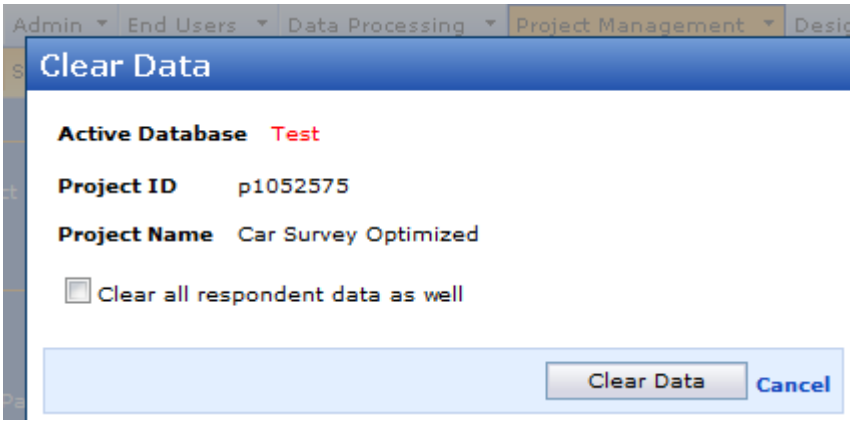


Figure 863 The Clear Data overlay

2. Check the **Clear all respondent data** box if required (this will also remove the respondents from the database).
3. Click **Clear Data**.

The Confirm warning message shown below appears. Note that if you click **OK** here, the data will be deleted and cannot be retrieved.

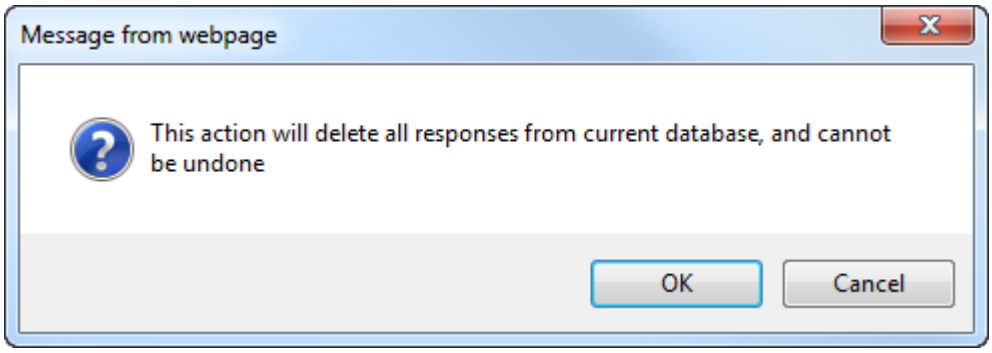


Figure 864 The Confirm deletion warning

4. Click **OK** to continue and delete the data, **Cancel** to abort the operation.

27.2. Edit Survey Data

The Edit functionality enables you to edit and delete survey data, i.e. directly modify or remove the responses given by your respondents.

Warning:
Remember that you are operating directly on the survey database and changes can not be undone. Be very careful when using this functionality.

The editor has three frames:

- The left frame with the questionnaire is used to update all respondents that resulted from the search.
- The upper-right frame is used to search for respondents.
- The lower-right frame is used to update answers for one respondent.

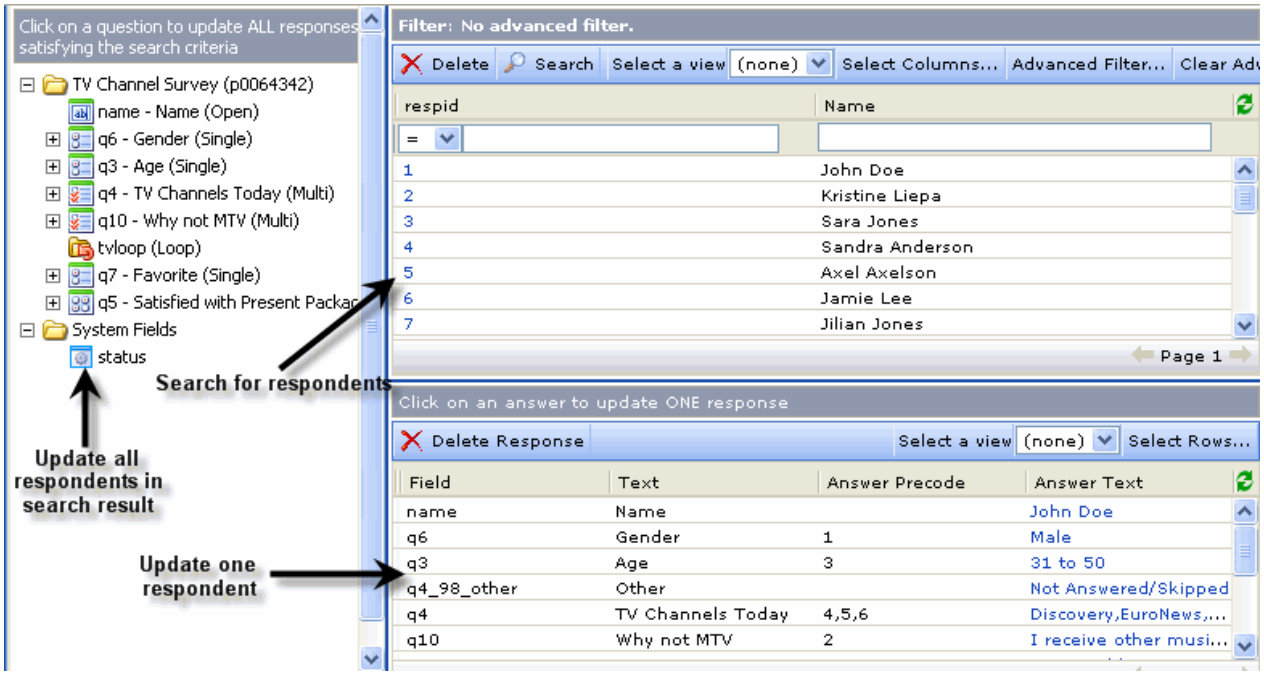


Figure 865 Example of the Edit Survey Data window

Note: The questionnaire tree in the left column will be laid out as the data is stored. When the Optimized Database format is in use (see The Optimized Database Format on page 38 for more information), loops may be used to provide the answers to other questions. In the event you have for example a multi question M1 that includes some "normal" answers and also a loop reference, then the responses to the "normal" answers will be stored on the level of the questions while the responses to the loop questions will be stored in the loop. The multi M1 will therefore appear in two places in the tree.

27.2.1. Searching for Respondents

A respondent list can be huge - millions of names - so a method of reducing the list to a manageable size so you can find the data you wish to edit is vital. This section describes the search functionality for the data editing window.

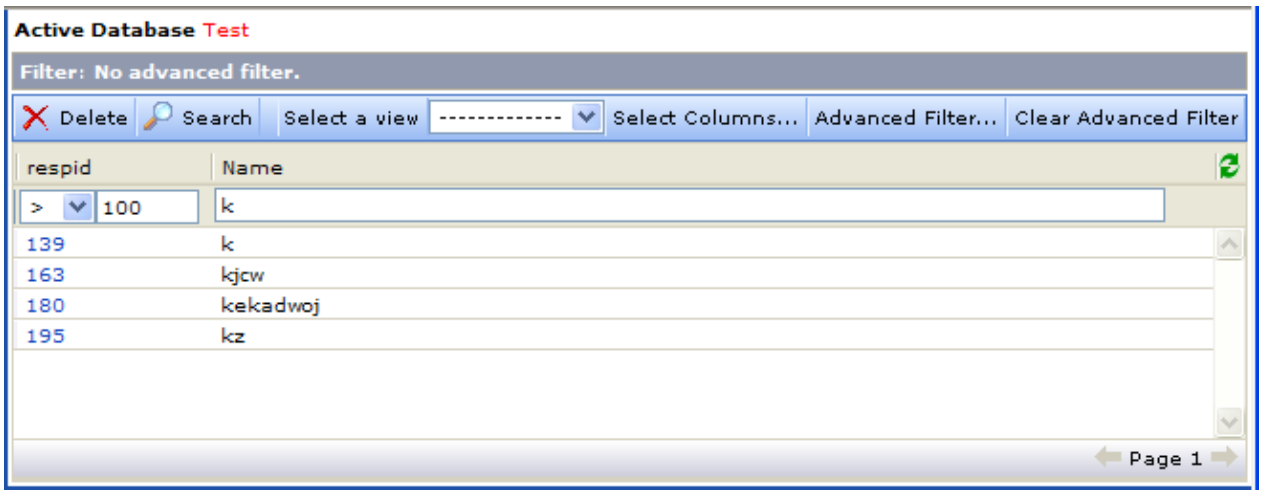


Figure 866 The Search frame

Note that the Test database with randomly-generated data has been used to create the figure above,. Note also that while the Respid and Name columns show the "actual" data, all other columns in the list will show the codes of the answers.

There are two main methods of searching in the search frame:

- Standard search (see Standard Search on page 787 for more information)
- Advanced search (see Advanced Search on page 787 for more information)

27.2.1.1. Standard Search

Search by typing text or code into the text boxes at the top of the columns. For respid you can enter a number (integer) and search with operators <, <=, =, => or >. For the other fields a wildcard is automatically added to the end of the string. You may also use the * character as a wildcard anywhere in the text searches.

27.2.1.2. Advanced Search

The Advanced Search functionality enables you to set up more advanced expressions involving any variables from the survey. To define a search:

- Click the **Advanced Filter** button.

  The Advanced Filter Designer window opens. Here you can create and set up an advanced filter (see The Advanced Filter Designer on page 742 for more information)

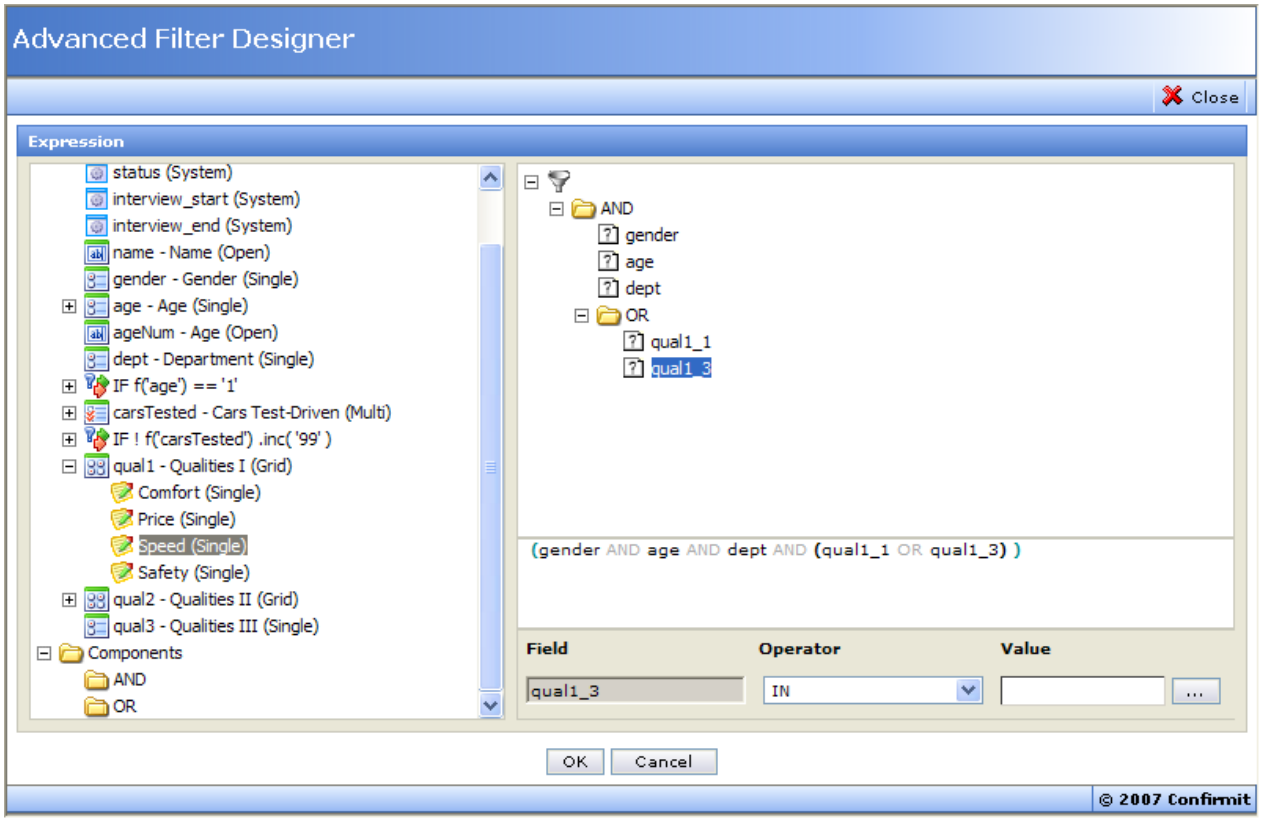


Figure 867 Example of the Advanced Filter Designer

- To remove the filter, click **Clear Advanced Filter**.

27.2.2. How to Add and Remove Columns

To add or remove columns in the search view:

1. Click the **Select Columns…** button.

   The Select Columns window opens as shown below. The question types available as columns in the search view are open text and single questions, and the system variables status, interview_start and interview_end.

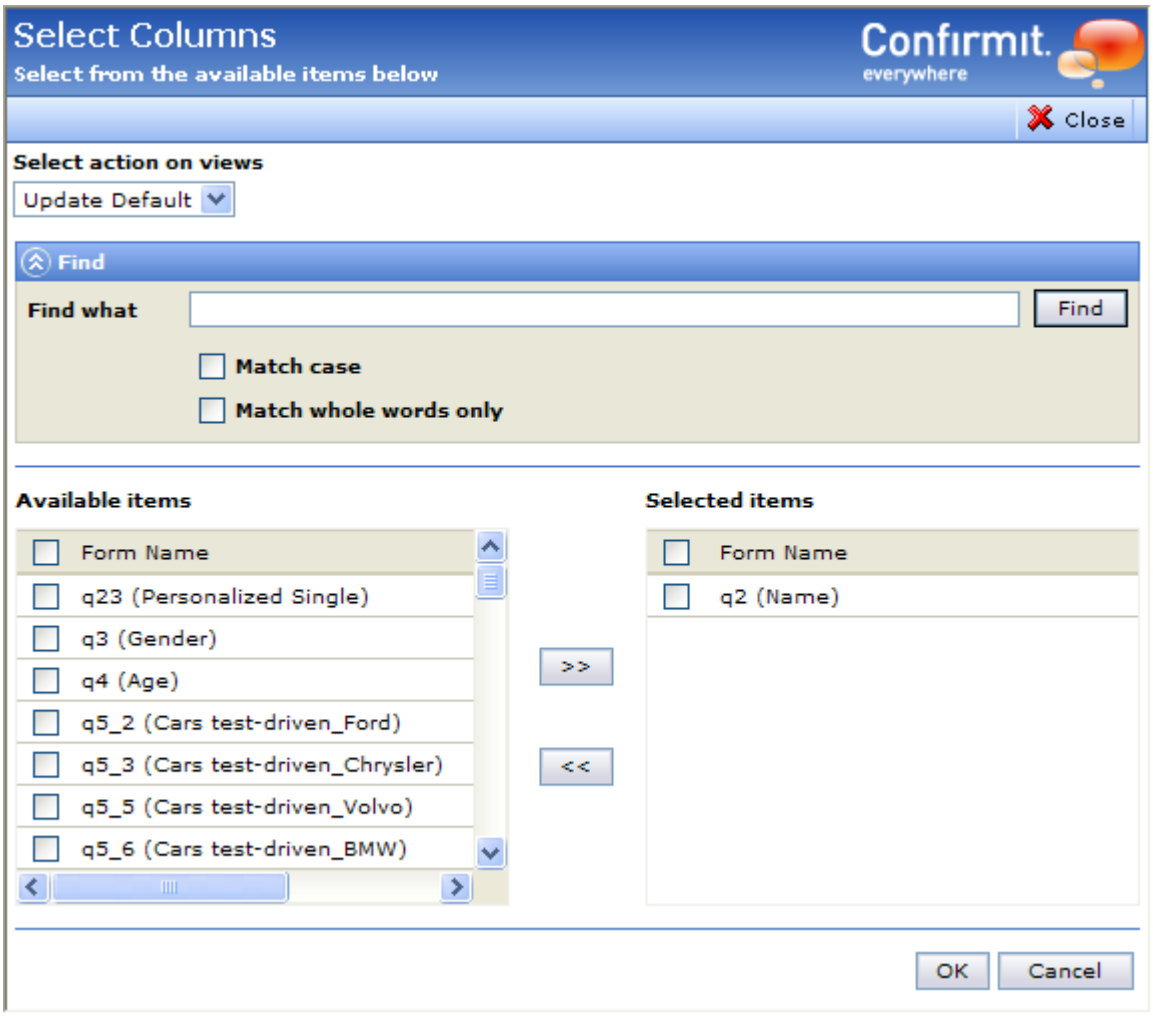


Figure 868 Selecting the columns

2. Select the desired columns in the Available Items list.
3. Click the **>>** button to move them to the Selected Items list.
4. On completion, click **OK**.

Note that you can save a column setup as a View (see Views on page 788 for more information).

27.2.3. Views

In some cases you may wish to see different sets of columns in the search window depending on the information you want to display. To avoid adding and removing items numerous times via the Select Columns window, you may define these selections as predefined Views. To save a column selection as a View:

1. Go to the Select Columns window and set up the columns as required.
2. In the upper-left corner of the window set the **Select action on views** drop-down to **Save As New**.

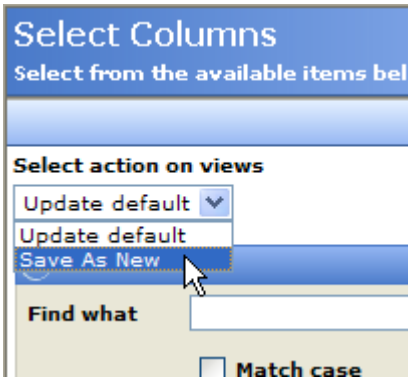


Figure 869 Selecting Save as New

When you select the Save As New item, a text field opens next to the drop-down field.

3. Type into this field a logical name for the view.

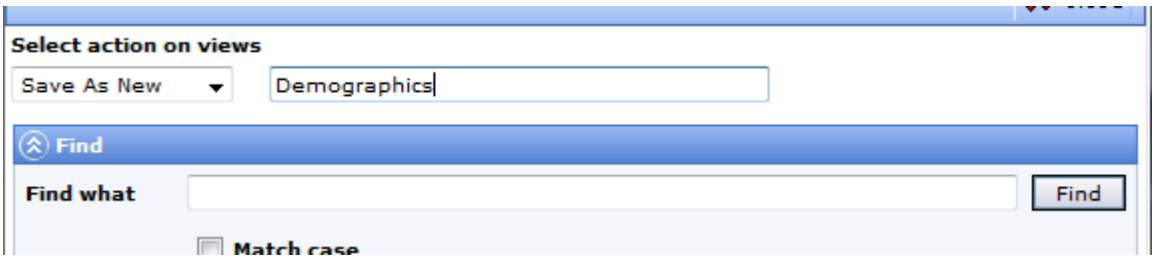


Figure 870 Naming the View

4. On completion, click **OK**.

The views you define will be listed in the Select a View field in the search window. When performing a search, you can first select the desired view so the required information is displayed.

Once a View has been created, additional options appear in the **Select action on views** drop-down. You can update and delete Views as necessary.

- To update a View, open it using the Select a View drop-down, edit it as necessary then select **Update Existing** from the **Select action on views** drop-down menu.
- To delete a View, select it and choose **Delete** in the **Select action on views** drop-down.

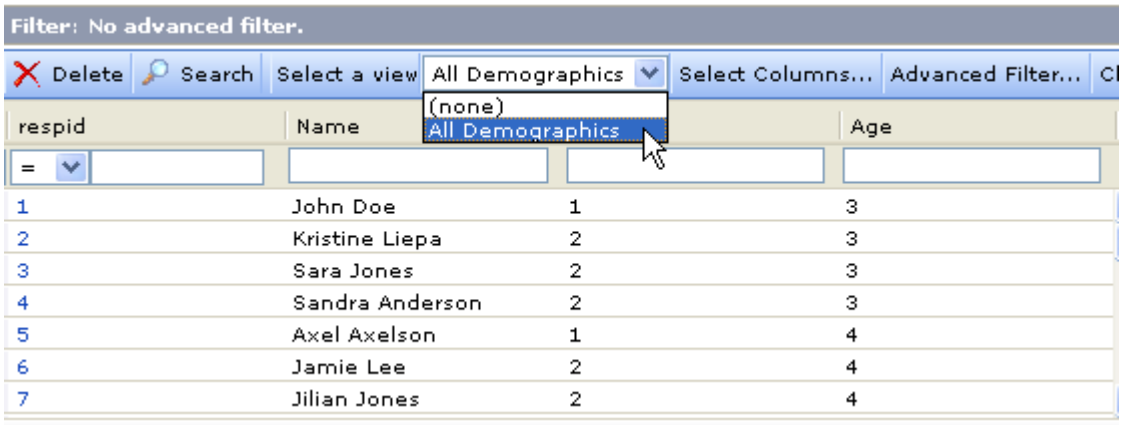


Figure 871 Selecting a View from the drop-down list

27.2.4. How to Delete Respondent Data

To delete respondent data:

1. Perform a search such that only those respondents for whom you wish to delete the data are displayed in the list.
2. Click the **Delete** button.
3. Confirm the deletion.

Note: Before you confirm the deletion, make absolutely sure that this is the correct set of respondents. This action can not be undone.

This will not remove the respondents from the respondent list, but will remove all their responses and give them the status "Not answered".

Important
If your survey contains quotas, deleting data could cause quota counts to be incorrect. This can be rectified by running a quota recalculation for the quotas. Note that this is not done automatically when the data is deleted.

27.2.5. How to Update Answers for All Respondents in a Search Result

You can update the answers for a specific question for all the respondents visible in the list.

1. Perform a search such that only those respondents for whom you wish to update the data are displayed in the list.
2. In the left frame of the Edit window (the questionnaire tree), click on the question text of the question you wish to change the answers for.

   The Update Responses window opens.



Figure 872 Example of the Update Responses window for a Single question

Note: The functionality available in the window will depend on the type of question you have selected.

For single questions, a list of the codes and answer texts (in the current language) is displayed. You can either select one of the items or set the question to "Not answered " (this will delete existing answers for the question and leave the field blank).

For open text questions (and open text questions with the numeric property) the window includes fields in which you can either set a new value or set the question to "Not answered" (empty/null) for all respondents matching the search criteria.

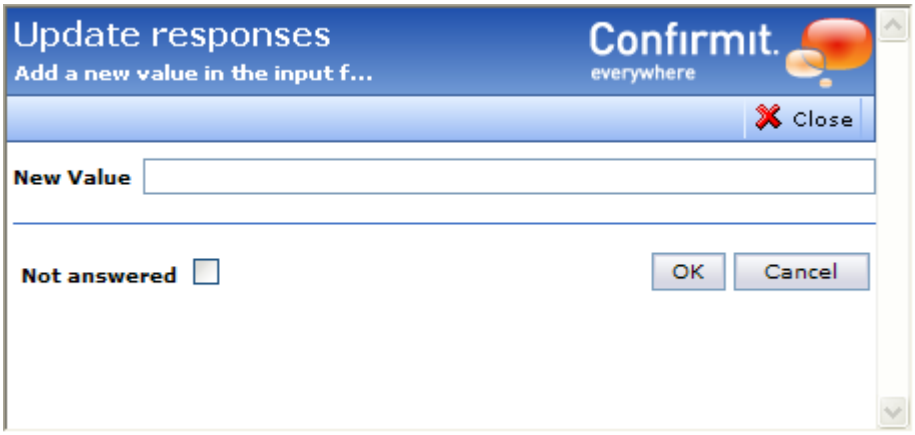


Figure 873 Example of the Update Responses window for an Open text question

For ordinary multi questions, a list of the codes and answer texts in the current language is displayed as shown below. Choose the items to be updated, then go to the Set to drop-down in the lower-right corner of the window. In the drop-down, select what items are to be set to: "Selected" (1), "Not selected" (0) or "Not answered" (null).

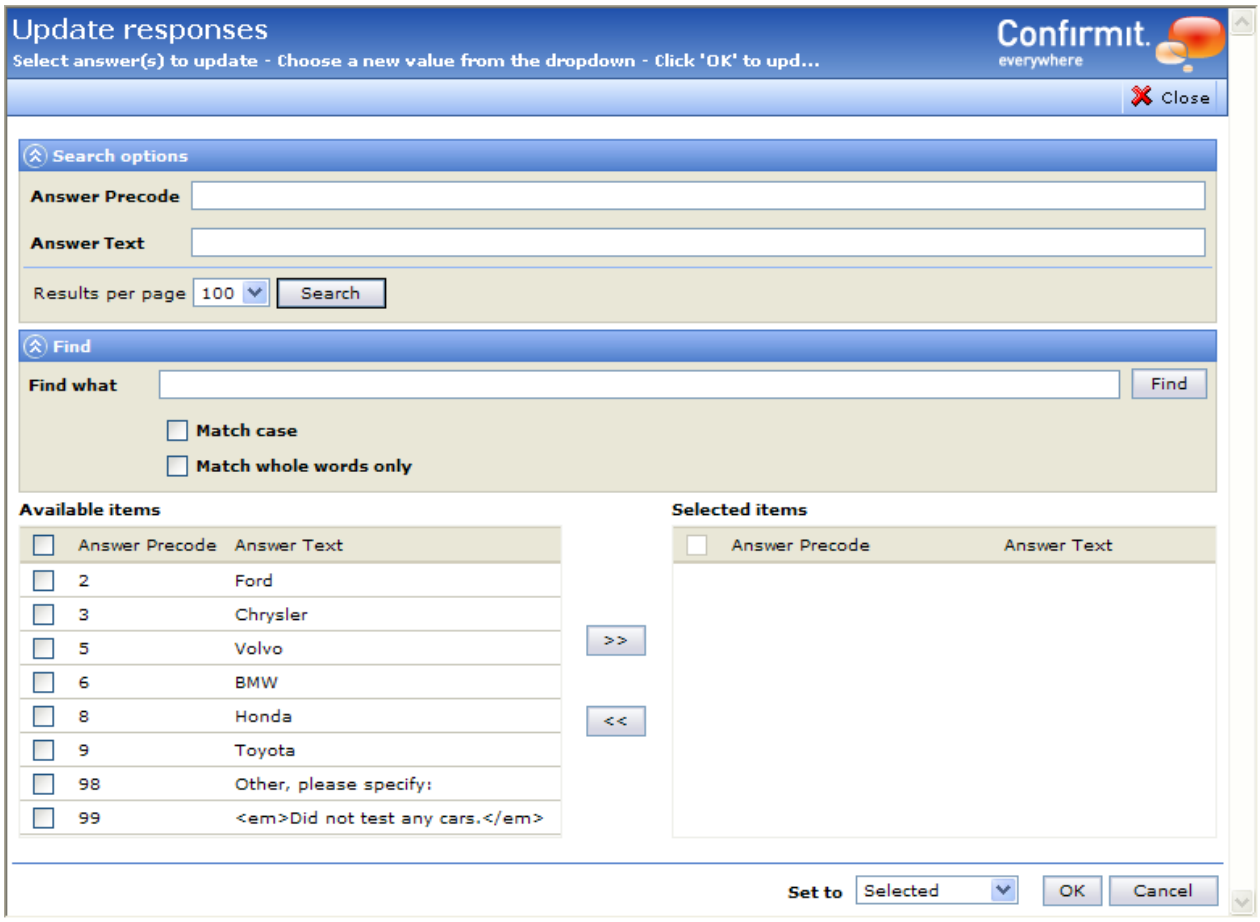


Figure 874 Example of the Update Responses window for an Ordinary multi question

For a multi question with the open, numeric or ranking property, the drop-down will be replaced with a text box and the **Not answered** checkbox. Select the items to be updated in the answer list, then either set a value in the text box or select **Not answered**.

For a grid question, you must expand the grid and work on each of its elements as if they were single questions:

Similarly, for "Other specify" elements on any question, you must expand the question to set the "Other specify" item. Setting an "Other specify" item is just like setting an open text question.

27.2.6. How to Update One Respondent's Answers

To edit the responses of one respondent, click on the respondent's respid in the search result.

All the fields in the questionnaire, and that respondent's answers, will then be listed in the lower right frame. The fields will appear in the same order as in the questionnaire. There is a display maximum of 100 fields per page, so if there are more than 100 fields you can move between pages using the arrows at the bottom of the screen. The table lists field name, text (in current language) and the current values stored.

For Single questions, Multis and Grids, both the code and answer text will be displayed. For Open Text and Numeric questions the current value will be shown in the answer text field and the code field will be empty.

Multis are displayed in one row, and answer code/text will list the items that have been selected. Grid, Open Text or Numeric questions are split such the one row is presented for each item in the answer list.

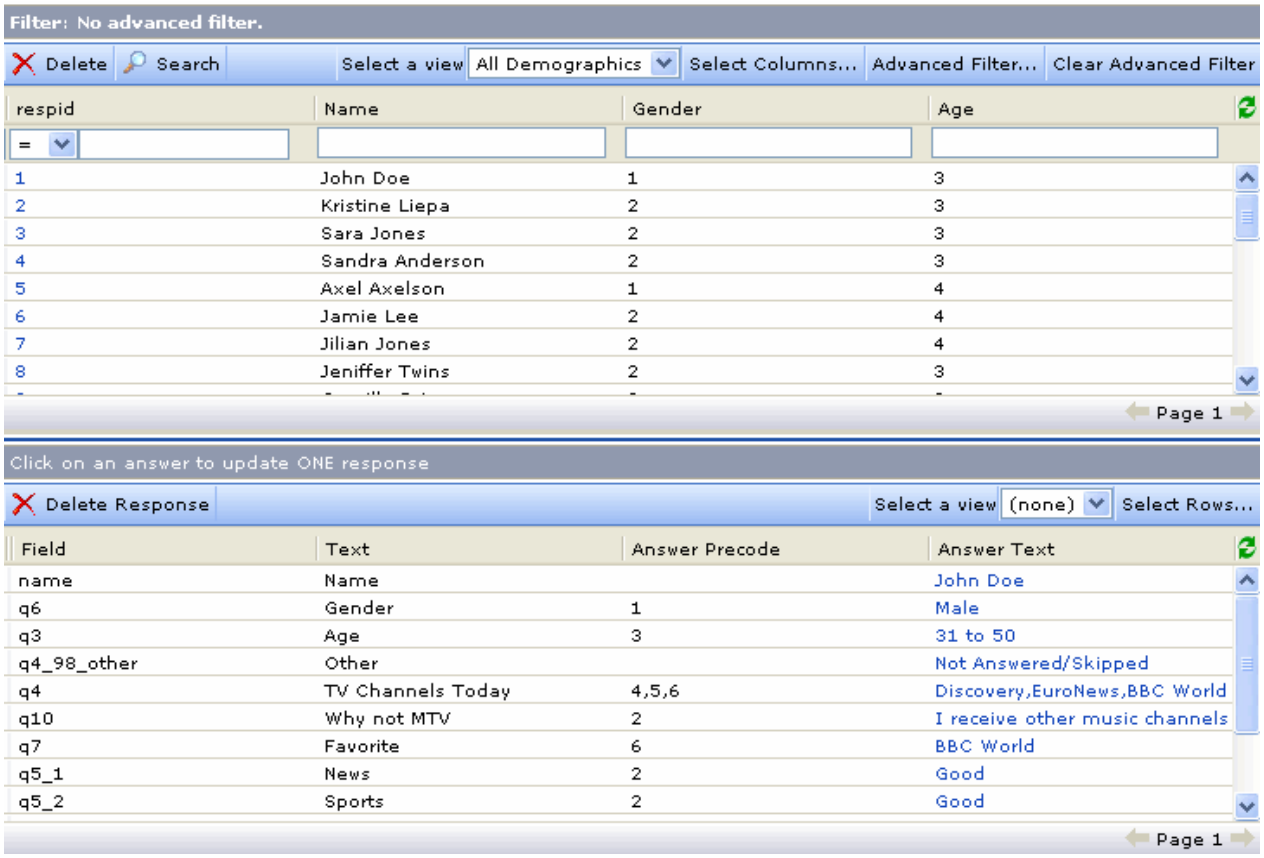


Figure 875 Example of the Data editor for a specific respondent

- To update a value, click on the link in the answer text column.

  A window opens, with data fields depending on the type of question. You can delete the current response/respondent by clicking the Delete Response button in the upper-left corner of the lower frame. If you want only specific Rows to be displayed, you can choose these by clicking on the **Select Rows** button. This will open a pop-up window where you can choose the rows to be displayed. You can also define Views by choosing which data fields to display (see Views on page 788 for more information).

For Open Text questions, Numeric and "other specify" fields, the window has a text box with the current value. You may either change this or select the "Not answered" checkbox, as shown below.

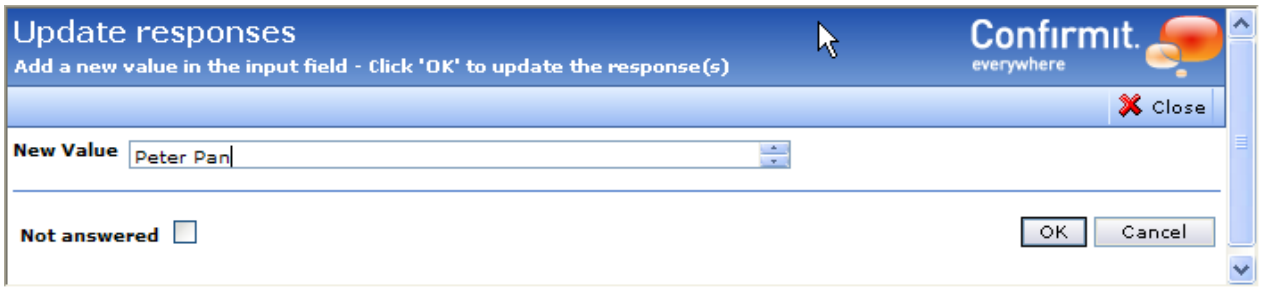


Figure 876 Example of the Update Responses window for an Open text question

For Single questions and elements of Grid questions, you get a window with the answer list (codes and texts in current language). The current value will be preset. You may either select another item in the answer list or select the "Not answered" checkbox.

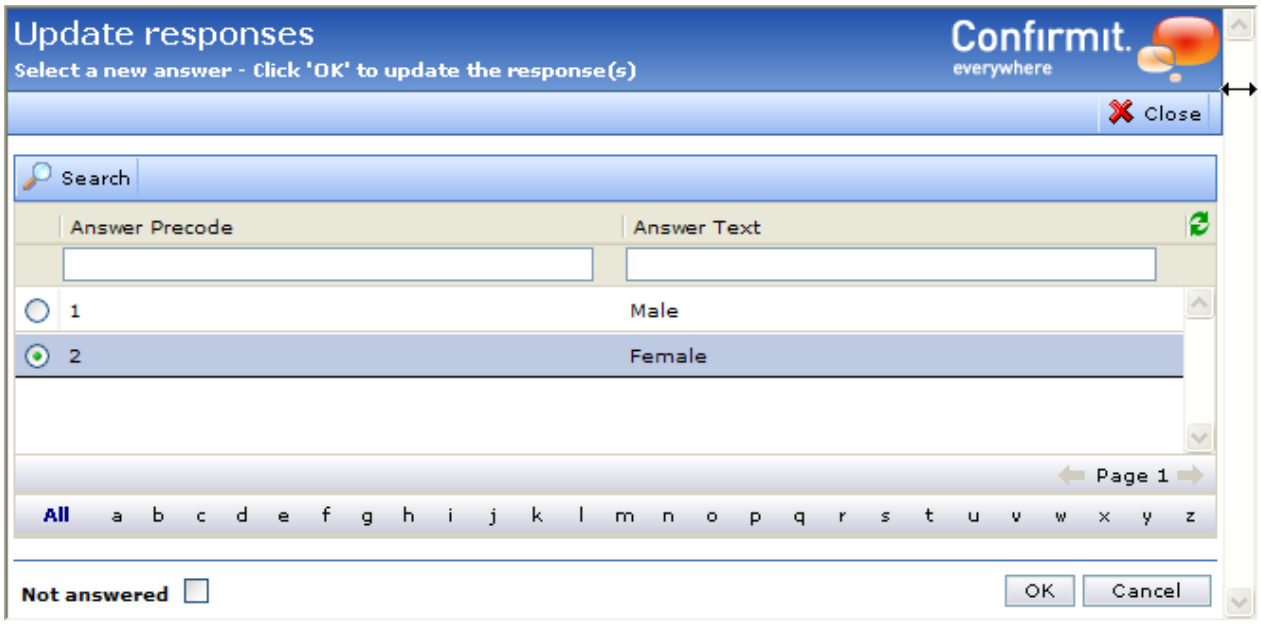


Figure 877 Example of the Update Responses window for a Single question

For Multi questions, the window displays the currently selected items in the "Selected items" list. You can add or remove items from that list as required, then select how the elements are to be updated by selecting the appropriate option in the "Set to" drop-down at the bottom of the page. The options are: "Selected" (1), "Not selected" (0) or "Not answered" (null).

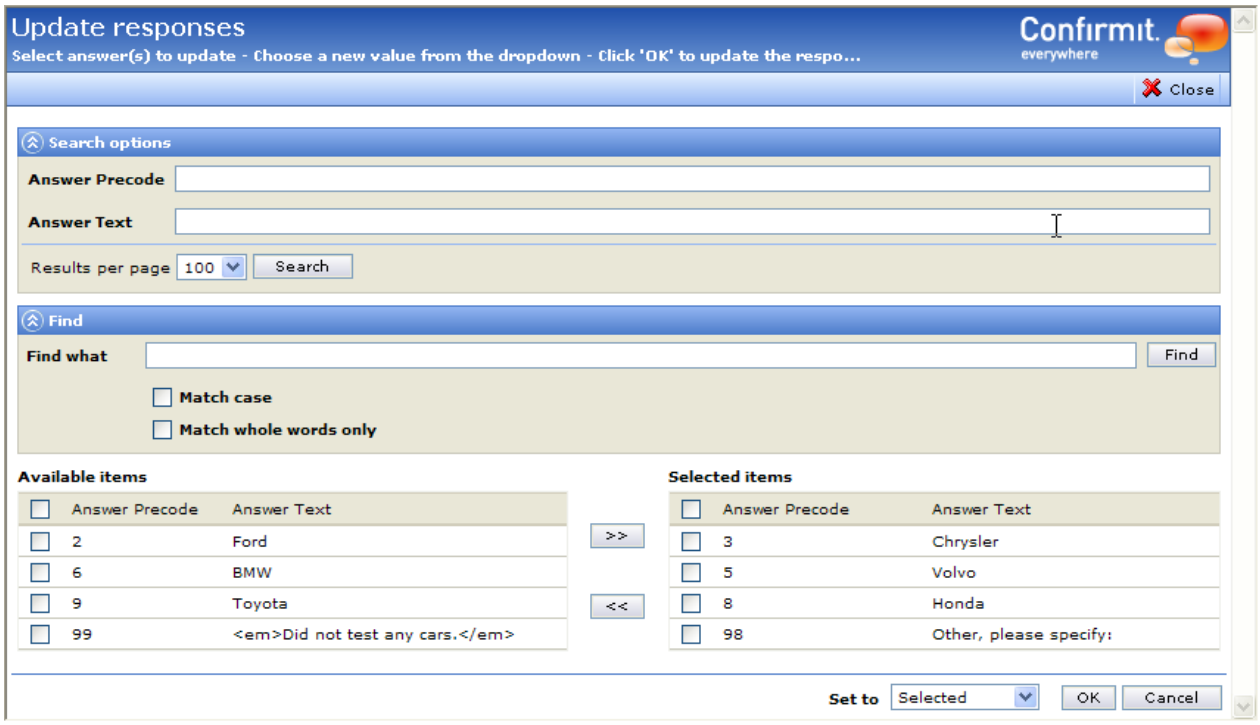


Figure 878 Example of the Update Responses window for an Ordinary multi question

For Numeric, Ranking or Open Text, when you click any of the elements, the window includes the entire answer list. Here you can select some of the items in the answer list, and then set a value in the text box at the bottom or select "Not answered" to update the selected items.

27.3. Data Transfer

Survey data (the respondents' answers to the questions in the surveys) can be exported from and imported to Confirmit surveys. It is possible to export response data to Triple-S, SPSS, MS Excel, Quantum, SAS and ASCII files. Data can be imported from ASCII tab-delimited files, Excel and Triple-S XML.

Important
If a survey has loops and you wish to import data to the survey then you can only import Separate Files; Single Files cannot be imported. So if you are planning to import data to a survey with loops, then you must choose the Separate File export option. For example if you wish to perform data cleaning, you must export the data to Separate File, clean the data, then import the Separate file.

The files will use the variable names that are used in the database, based on the question Ids. The table below explains the variable names and contents of the files, except for the "Export Codes as labels" which exports answer texts instead of codes .

Single	One column with a tag identical to question id, and with answer codes as contents.
Open Text	One column with a tag identical to question ID, and the answer text as the content.
Multi	One column per answer alternative. Tag is equal to question id_code of the answer alternative. Contents are either 0 (not selected) or 1 (selected).

Grid	A column for each sub question (answers). Tag is equal to: question id_code of the answer alternative. Contents are the codes of Scales.
Other	“Other: specify” in single, multi or grid questions is represented in data files in the following way: Tag is equal to question id_code_other. Contents will be the answer text.
Numeric	One column with a tag identical to question ID, and the answer value as the content.
Date	One column with a tag identical to question ID, and the date value as the content.
Ranking	One column per answer alternative. Tag is equal to question id_code of the answer alternative. Contents will be the position number of the answer in the list.
Open Text List	One column per answer alternative. Tag is equal to question id_code of the answer alternative. Contents will be the entered text.
Numeric List	One column per answer alternative. Tag is equal to question id_code of the answer alternative. Contents will be the entered values.

All exports will be sent as compressed files with **.zip** extension ("zipped") and may be extracted by using standard software such as WinZip®. You can also order MS PowerPoint® and MS Excel® exports of your reports, and MS Word® exports of the questionnaire (see How to Export a Survey to Word on page 195 for more information).

Important
If a survey data export or import task is to be recurring, it must be set to recurring before it is executed for the first time (set start time to "Schedule for later execution" and on next page set it to recurring).

27.3.1. The Survey Data Template Editor

You can build templates to choose a subset of data fields for your exports and imports. Then, instead of choosing all the variables individually when preparing an export or import, you can choose one of these templates to achieve the required subset.

The Template Editor functionality and the options available in the dialogs apply as default to all surveys.

Note: The template editor allows you to specify templates for both the production and the test database. The databases are created when a survey is launched, and as this may be done at different times for the production and test databases, changes may have been made to the questionnaire in between. The test and production databases may contain different fields, so before editing templates you must select the database you wish to use and then click Show.

The Survey Data Template Editor is described in the separate Data Processing documentation.

27.3.2. Exporting Data

When exporting data, the dialog and options for step 2 of the procedure will depend on the export format that you select in step 1.

All export tasks will generate files with unique names in the following format: <projectid>_<userid>_<taskid>.<extension>. The "Override file name" functionality allows you to override this system-generated name. Tick the checkbox in the export form to open the "File name" text-box where you can specify a new name (see APPENDIX F: EXPORT FILENAME DYNAMIC VALUES on page 866 for more information).

Important
If a survey data export task is to be recurring, it must be set to recurring before it is executed for the first time (set start time to "Schedule for later execution" and on next page set it to recurring).

Important
If a survey has loops and you wish to import data to the survey then you can only import Separate Files; Single Files cannot be imported. So if you are planning to import data to a survey with loops, then you must choose the Separate File export option.

27.3.2.1. Exporting Data - Step 1

To export data from a survey:

1. With the survey open, go to the **Survey Data > Exports** menu command.

   The first stage of the Export dialog opens.

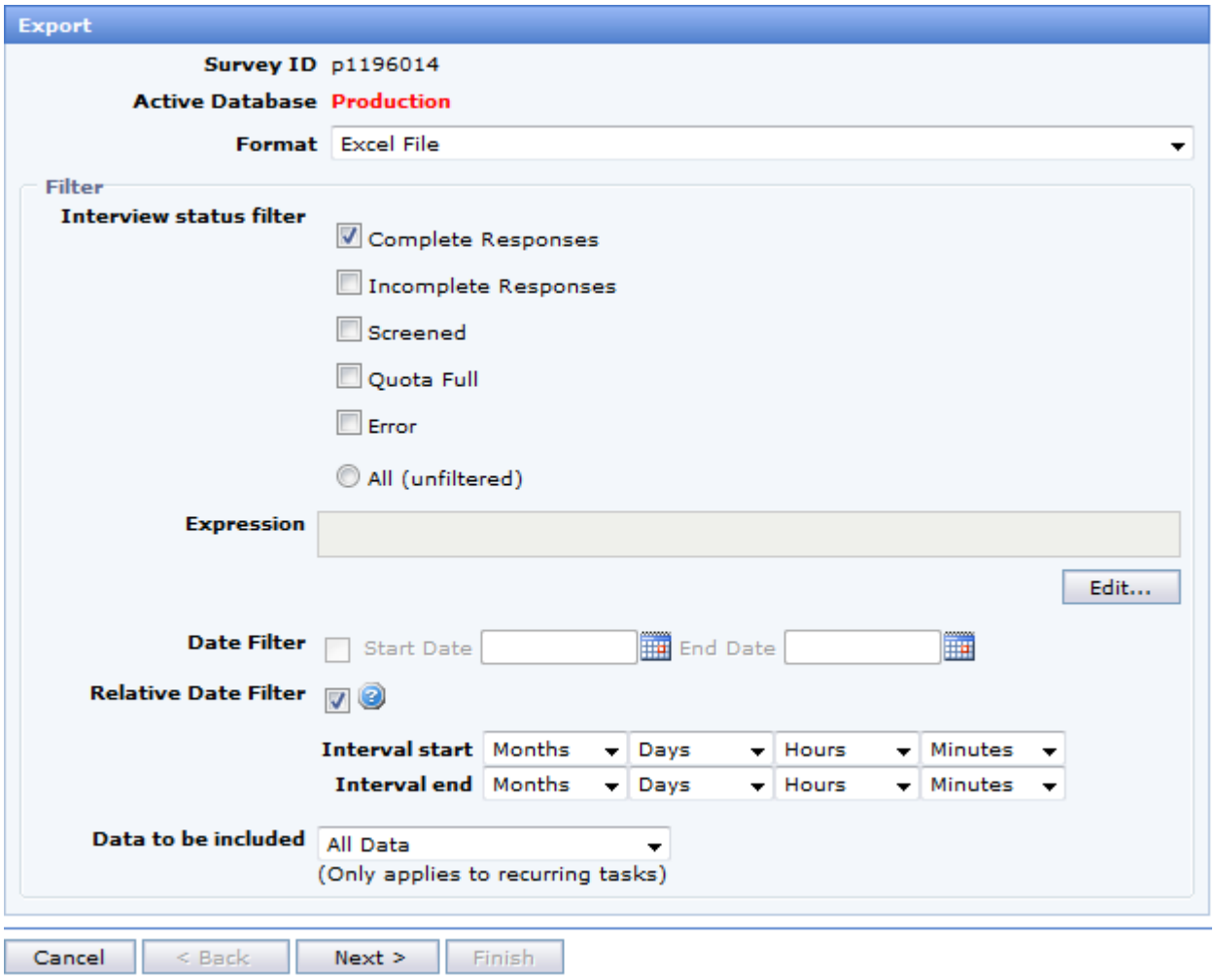


Figure 879 The first stage of the Export dialog

The information displayed, and the options available, are as follows:

- **Survey Id** - the identification number of the survey you are currently working on.
- **Active Database** - the currently selected database. To change this, go to the Database selection field in the lower-right corner of the Confirmit window.
- **Format** - the format in which the file is to be exported. Note that the dialog displayed in the next step in the Export procedure will differ depending on the format you select here.

Note: When exporting to Excel, if you intend to re-import the data that is to be exported then you should choose 'Excel File' not 'Excel File (Answer Codes as Labels)'. This is because you cannot import the data if it's in the format 'Answer Codes as Labels'.

- **Interview Status Filter** - lists all the statuses the survey can have. Check the appropriate boxes to include the data from all respondents who have that status.
- **Expression -** this field allows you to generate filtered data exports. For example, say you would like to export only female records. Assuming you had a question in the survey “What is your gender?”, with the answer options Male=1 and Female=2, you can generate an expression such as gender="2". This would filter out only female records when using the Survey Data Export.
- **Date Filter** - you can choose to include in the export file only the respondent data that has been entered into the database within a specified date range. To do so, check the box to activate the functionality, then type in or select the Start Date and End Date for the required period.
- **Relative Date Filter -** allows you to export data from different time intervals relative to the scheduled export time. This is useful when data exports are run as recurring tasks.
- **Data to be included** - Once a respondent has replied to a survey and that response data has been included in an export file, that data will in many cases not change. For recurring data exports, much of the data exported will therefore merely be a repeat of earlier exports. This option allows you to select whether you wish to export all the available data or only those records that have been added or modified since the previous data export task.

2. Select the required format for the export. Note that the options available in step 2 of the dialog will depend on the format selected here.
3. Select the interview statuses that are to be included.
4. If you want to specify a date range for the data, check the Date Filter box and select the desired dates.
5. Click **Next**.

   The second stage of the Export dialog opens. Note that the options available in the dialog will depend on the export format you have selected.

   - Excel
   - Excel File (Answer Codes as Labels)
   - Delimited Text File
   - Delimited Text File (Answer Codes as Labels)
   - Confirmit Extended Triple-S XML file
   - Triple-S XML (Standard)
   - SPSS
   - Quantum
   - SAS file
   - Fixed width file

27.3.2.1.1. The Relative Date Filter

The Relative date filter allows you to export data from different time intervals relative to the scheduled export time. This is useful when data exports are run as recurring tasks.

For example. If a task is set to run every Monday at 00:01, and you want to export data from the last month, you can set up the export task with these "relative" settings:

- **Interval start:**
  - Months = 1.
  - Days = (not specified).
  - Hours = (not specified).
  - Minutes = (not specified).
- **Interval end:**

- Months = (not specified).
- Days = (not specified).
- Hours = (not specified).
- Minutes = (not specified).

A more complex example could be:

Let us assume that a data export has been scheduled to run at a specific time N, and the user wants to receive data for an interval:

- Start = N - (2 months + 3 days)
- End = N - (1 month + 5 hours + 30 minutes)

The interval length will be as follows:

(2 months + 3 days) - (1 months + 5 hours + 30 minutes) = (1 months + 2 days + 18 hours + 30 minutes).

To perform a data export for the above-mentioned interval, enter the following specifications in export properties:

- **Interval start:**
  - Months = 2.
  - Days = 3.
  - Hours = (not specified).
  - Minutes = (not specified).
- **Interval end:**
  - Months = 1.
  - Days = (not specified).
  - Hours = 5.
  - Minutes = 30.

Note: When the source is a survey database the Relative Date filter is based on Interview Start, while for a Respondent database it is based on the system variable CreatedDate.

27.3.2.2. Step 2 when the Export Format is Excel

If you have selected to export to **Excel File** or **Excel File (Answer Codes as Labels)** in stage 1 of the dialog, then stage 2 of the dialog will appear as below.

Note: When exporting to Excel, if you intend to re-import the data that is to be exported then you should choose 'Excel File' not 'Excel File (Answer Codes as Labels)'. This is because you cannot import the data if it's in the format 'Answer Codes as Labels'.

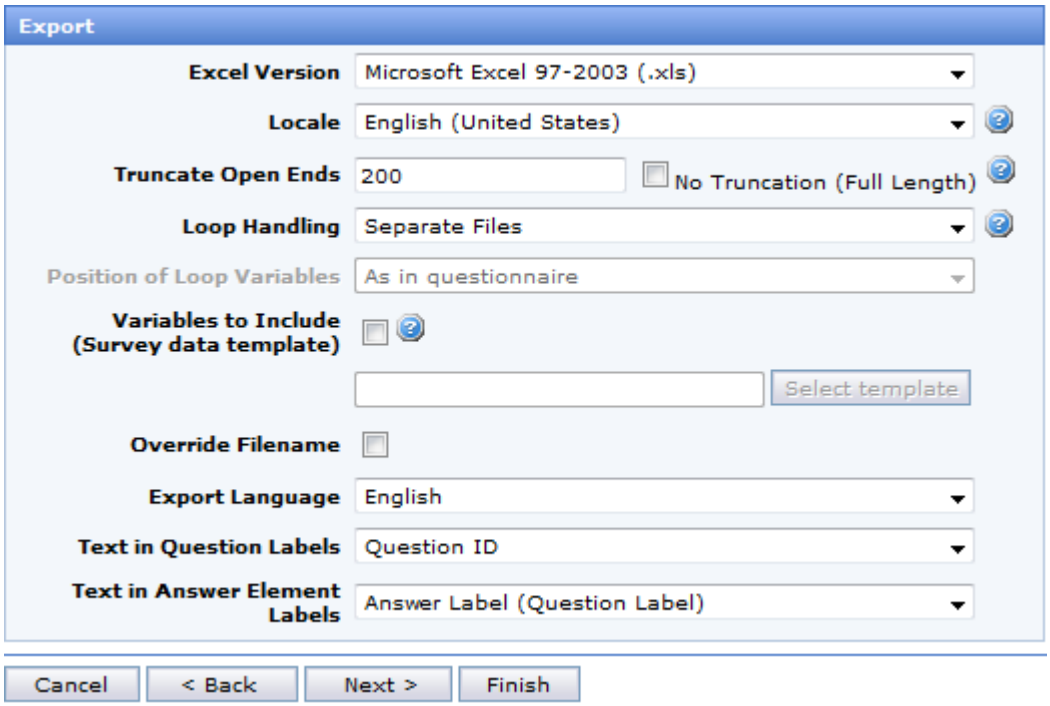


Figure 880 The second stage of the Export dialog for an Excel export

Make the appropriate selections. The information displayed, and the options available, are as follows:

- **Excel Version** - the file will be exported to MS Excel® in the Office version selected (default .xlsx). The variables may be split over several worksheets. Microsoft Excel 97-2003 (.xls) and Microsoft Excel 2007 or newer (.xlsx) are supported. The variable names will be in the first row.

Note: The default Excel export format is now .xlsx, and all new export tasks will use this format unless another format is selected. Older tasks, for example recurring tasks that were set up before the default format changed, will continue to export to the format specified when the task was set up.

- **Truncate Open Ends -** for Open Ends (Open Text questions with no field width specified), it is recommended to truncate texts to improve performance. If a number of characters is specified for the Open Ends Width, texts longer than this limit, if any, will automatically be truncated. If No Truncation (Full Length) is selected, the whole text will be imported/exported, but the task will take significantly longer to execute.
- **Loop Handling -** this option is only available if the survey included loops. Here you specify how loops are to be handled for the export. The options are:
    - **Separate files -** the default export format for loops creates one export file for each loop, and one export file for the top level. In the files containing the loop data there will be one row per loop iteration per respondent, so there will be several rows for each respondent. Each row will have the responseid (system generated respondent id) of the respondent and the precode of the loop id for the iteration as identifiers, and then the answers for the questions inside the loop for that specific iteration for that respondent. This means you can export a hierarchical survey without having to generate a flattened template.
    - **Single file -** Instead of exporting loop data as separate files, you can export all data belonging to a survey in one single file. Loop data will then be expanded. This means that variables will be created to represent each iteration of each question.
- **Position of loop variables -** only available when Single file is selected in the Loop Handling option. This allows the user to specify in which position the loop variables should be exported. The options are:
    - **As in Questionnaire -** the loop variables are positioned as the corresponding loop was placed in the questionnaire.

- **Appended at end -** the loop variables are appended at the end of the template.

- **Variables to include (Survey Data Template)** - you can build templates to choose a subset of data fields for your exports. If you check this box, select the template you wish to use. Refer to the Data Processing documentation for more information.

Note: With the Survey Data Template the user can specify which variables are to be exported and in which order. Label information is taken from the "Text in Question Labels" and "Text in Answer Element Labels" options. This applies to all Excel and Text Delimited File exports. For the other exports all information is taken from the Templates and these options are not available.

- **Text in Labels -** when the Variables to include (Survey Data Template) option above is selected, the Text in Labels option becomes available. Here you can select whether you wish to export the column labels from the template or from the survey (the labels can be modified in the template - see the Data Processing User Guide for further details).

- **Override Filename -** allows you to override the system-generated file name. Tick this checkbox to open the file name text-box. Here you can edit the system-generated name (see APPENDIX F: EXPORT FILENAME DYNAMIC VALUES on page 866 for more information). Note that when exporting Survey Data to the FTP server in Survey Data > Exports or Data Processing rules, the Override Filename option accepts relative paths, as for example "..\..\myftpfile_in_another_folder.txt". In this case the file will not be stored in the default folder ("ProjectsData\p123123" or "RulesData\RuleN"), but rather directly under the (Company) Download folder.

Note: The '_^PROJECTID^_' part of the name will be replaced by the real survey id during the export. Default is ^PROJECTID^_^USERID^_^TASKID^ (if Date Filter is used, then ^START^ and ^END^ will also be included). ^PROJECTID^ is only "required" when executing a rule; it is not "required" when running an export using the Export GUI.

- **Export language** - in the event the survey is multi-lingual, select the survey language version to be exported.

- **Text in Question Labels -** select the text you wish to be included as the question labels. The options are:

  - **Text only -** the label element will contain the question id followed by the text of the question, separated by a colon.

  - **Title only -** the label element will contain the question id followed by the title of the question, separated by a colon.

  - **Title and Text -** the label element will contain the question id followed by a colon, then the question title followed by the question text, these separated by a hyphen.

  - **Question ID -** the label element will contain only the question id.

Note: As the engine that is used for the exports requires that the column titles are unique, and in Professional Authoring question titles can be the same on different questions, the question id is included first for all question label options.

- **Text in Answer Element Labels -** allows you to specify whether the Answer element of a Multi / Grid / Open Text List / Numeric List Question is to be positioned in front of the Question label, after the Question label or without the Question label when exporting survey data or when generating a Survey Data Template which can be used for a survey data export. The content of the Question label depends on the Text in Question Labels setting, which allows you to specify whether you want the Question ID, Question text, Question title or Question text and Title exported. Select the text you wish to be included as the answer labels. The options are:

  - **Answer (Question Label)** - the question label is placed after the answer element.

  - **Question Label (Answer) -** the question label is placed before the answer element.

  - **Answer -** the answer element is placed without the question label.

Note: When exporting to Microsoft Excel 97-2003, the column header text will be truncated to 64 characters. Note that this limitation does not exist in the Microsoft Excel 2007 or Delimited Text File export, which can be used instead. The text file output can then be opened and processed as required in Excel.

Note: Microsoft Excel 2007 cannot be imported. Only single files can be imported.

When you have made the appropriate selections, click **Next** to go to the third stage of the dialog.

27.3.2.3. Step 2 when the Export Format is Delimited Text File

If you have selected the Format in step 1 of the procedure to be **Delimited Text File** or **Delimited Text File (Answer Codes as Labels)**, then the dialog that opens in step 2 will be as shown below.

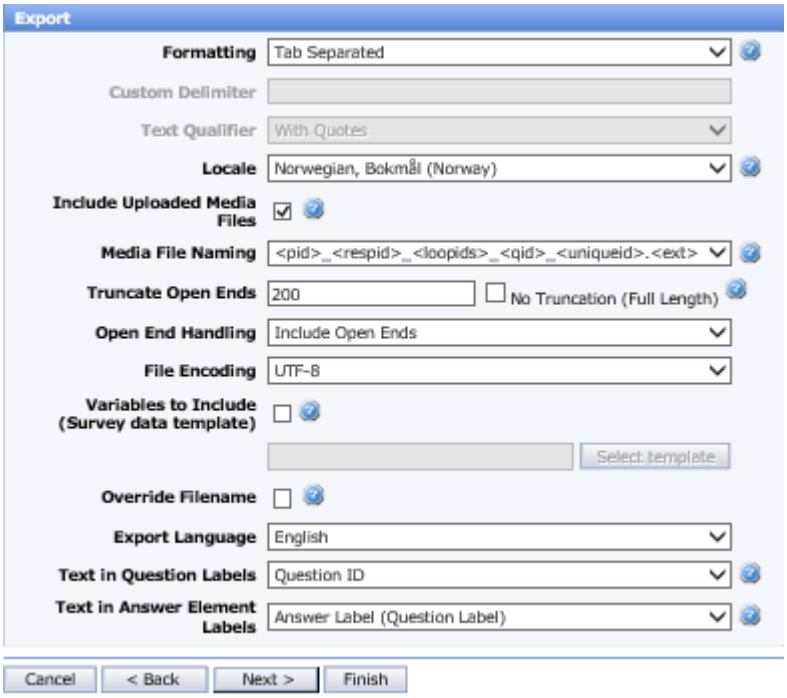


Figure 881 The second stage of the Export dialog for a Delimited Text File export

Make the appropriate selections. The options are as follows:

- **Formatting** - a delimiter is a sequence of one or more characters used to specify the boundary between separate, independent regions in plain text or other data stream. An example of a delimiter is the comma character in a sequence of comma-separated values. Select the delimiter that you wish to be used in the data file to be exported. The options are:
  - o **Comma** - a Comma (,) -separated ASCII text file is generated. All answers will be inside quotes (""). The variable names will be in the first row.
  - o **Tab** - a Tab-separated ASCII text file is generated. No quotes ("") are used. The variable names will be in the first row.
  - o **Custom** - the Custom Delimiter field is activated. Here you can select any single keyboard character, which will then be used as the delimiter in the exported ASCII text file.
- **Text qualifier -** this property is available when you select “Formatting: Comma separated” or "With Quotes". When "Comma separated" is selected, the comma character has a special meaning; it is used to separate the different values from the different variables. However during export commas will be removed from opentext answers since in this case the character has a different meaning. Adding quotes around an answer text ensures that the text remains unchanged. A Delimited Text File export with Quotes can be generated.
- **Locale** - determines the formatting of elements such as numbers (decimal point) and dates/times. Select the locale appropriate to the format used in the file.

- **Include Uploaded Media Files** - when selected, images captured as image upload question types will be included in the generated exported file. This option is only available for delimited file exports. The image file name is a JPEG with the same name as that stored in the data record for that question (see The Image Upload Object on page 232 for more information). In the event a large number of images are to be exported, FTP delivery should be used.
- **Media File Naming -** When media files are included, this property will determine the naming of the media files. The options are:
    - **Detailed (default) -** projectID_respID_loopIDs_questionID_uniqueID.extension
    - **Unique -** uniqueID.extension
- **Truncate Open Ends -** For Open Ends (Open Text questions with no field width specified), it is recommended to truncate texts to improve performance. If a number of characters is specified for the Open Ends Width, texts longer than this limit, if any, will automatically be truncated. If No Truncation (Full Length) is selected, the whole text will be imported/exported, but the task may take significantly longer to execute.

Note: There is no filter for Open End type, so all Open Text questions with no field width specified will be included in the export (those with type Normal, Hidden or Background), while those with field width set will not be included.

- **Open End Handling -** defines how open ended questions are handled. The options are:
    - **Include Open Ends -** all open end questions are included in the export.
    - **Exclude Open Ends -** no open end questions are included in the export.
    - **Open Ends Only (one row per respondent) -** only open end questions are included in the export file, with one row in the file for each respondent (all the answers for each respondent are in the same row).
    - **Open Ends Only (one row per answer) -** only open end questions are included in the export file, with one row in the file for each answer given.
- **File Encoding -** to support the export of surveys using Unicode (for example Chinese), you can choose the Character Encoding of the Export files. Choose between ANSI, Unicode and UTF-8 (default).

o **Loop Handling -** this option is only available if the survey included loops. Here you specify how loops are to be handled for the export. The options are:**Separate files -** the default export format for loops creates one export file for each loop, and one export file for the top level. In the files containing the loop data there will be one row per loop iteration per respondent, so there will be several rows for each respondent. Each row will have the responseid (system generated respondent id) of the respondent and the precode of the loop id for the iteration as identifiers, and then the answers for the questions inside the loop for that specific iteration for that respondent. This means you can export a hierarchical survey without having to generate a flattened template.

- **Single file -** Instead of exporting loop data as separate files, you can export all data belonging to a survey in one single file. Loop data will then be expanded. This means that variables will be created to represent each iteration of each question.

- **Loop Position -** only available when Single file is selected in the Loop Handling option. This allows the user to specify in which position the loop variables should be exported. The options are:
    - **As in Questionnaire -** the loop variables are positioned as the corresponding loop was placed in the questionnaire.
    - **Appended at end -** the loop variables are appended at the end of the template.
- **Variables to Include... -** You can build templates to choose a subset of data fields for your exports. Check the box, then select the template you wish to use.
- **Override Filename -** allows you to override the system-generated file name. Tick this checkbox to open the file name text-box . Here you can edit the system-generated name (see APPENDIX F: EXPORT FILENAME DYNAMIC VALUES on page 866 for more information). Note that when exporting Survey Data to the FTP server in Survey Data > Exports or Data Processing rules, the Override Filename option accepts relative paths, as for example “..\..\myftpfile_in_another_folder.txt”. In this case the file will not be stored in the default folder (“ProjectsData\p123123” or “RulesData\RuleN”), but rather directly under the (Company) Download folder.

Note: The '_^PROJECTID^_' part of the name will be replaced by the real survey id during the export. Default is ^PROJECTID^_^USERID^_^TASKID^ (if Date Filter is used, then ^START^ and ^END^ will also be included). ^PROJECTID^ is only "required" when executing a rule; it is not "required" when running an export using the Export GUI.

- **Export language** - in the event the survey is multi-lingual, select the survey language version to be exported.
- **Text in Question Labels -** select the text you wish to be included as the question labels. The options are:
    - **Text only -** the label element will contain the question id followed by the text of the question, separated by a colon.
    - **Title only -** the label element will contain the question id followed by the title of the question, separated by a colon.
    - **Title and Text -** the label element will contain the question id followed by a colon, then the question title followed by the question text, these separated by a hyphen.
    - **Question ID -** the label element will contain only the question id.

Note: As the engine that is used for the exports requires that the column titles are unique, and in Professional Authoring question titles can be the same on different questions, the question id is included first for all question label options.

- **Text in Answer Element Labels -** allows you to specify whether the Answer element of a Multi / Grid / Open Text List / Numeric List Question is to be positioned in front of the Question label, after the Question label or without the Question label when exporting survey data or when generating a Survey Data Template which can be used for a survey data export. The content of the Question label depends on the Text in Question Labels setting, which allows you to specify whether you want the Question ID, Question text, Question title or Question text and Title exported. Select the text you wish to be included as the answer labels. The options are:
    - **Answer (Question Label)** - the question label is placed after the answer element.
    - **Question Label (Answer) -** the question label is placed before the answer element.
    - **Answer -** the answer element is placed without the question label.

When you have made the appropriate selections, click **Next** to go to the third stage of the dialog.

27.3.2.4. Step 2 when the Export Format is Triple-S

If you have selected the Format in step 1 of the procedure to be Triple-S (refer to the Data Processing documentation for more information), then the dialog that opens in step 2 will be as shown below.

Note: Two Triple-S export formats are available; Confirmit Extended and Standard. The export formats are similar in all respects except that the standard format does not export Confirmit extensions.

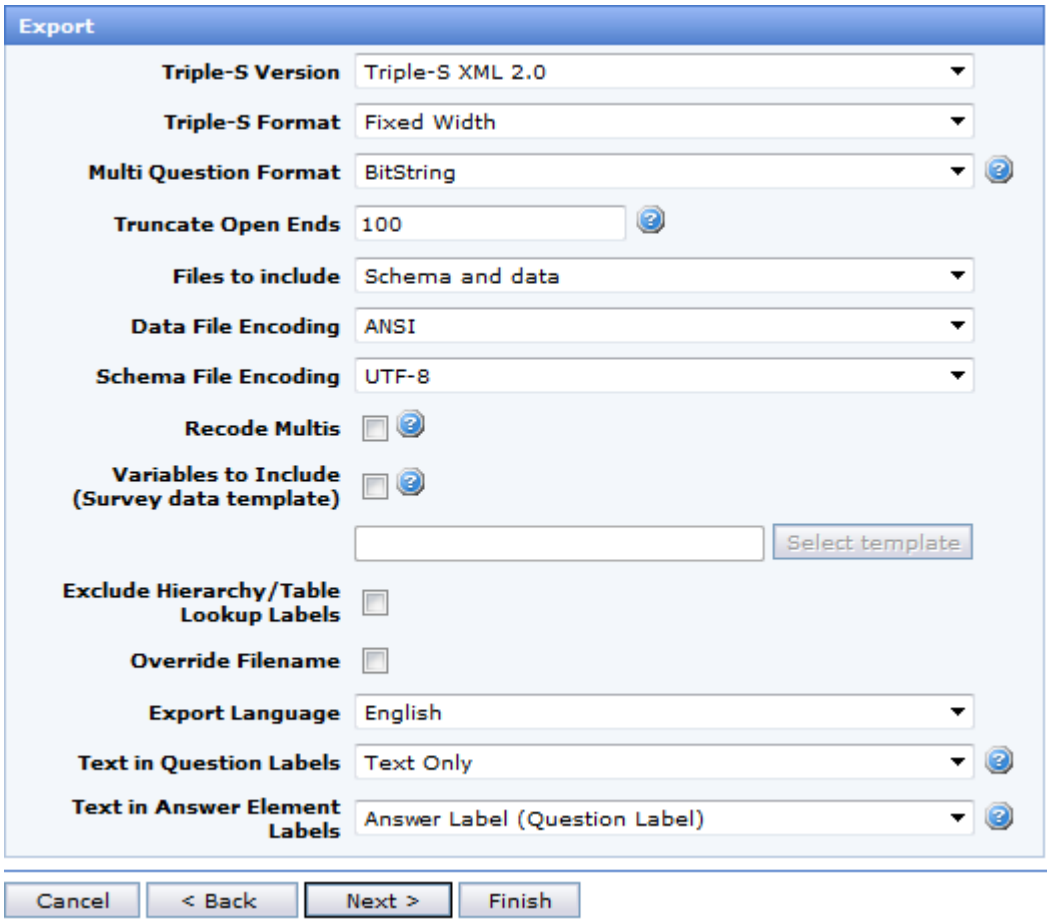


Figure 882 The second stage of the Export dialog for a Triple-S XML file export

Make the appropriate selections. The options are as follows:

- **Loop Handling -** this option is only available if the survey included loops. Here you specify how loops are to be handled for the export. The options are:**Separate files -** the default export format for loops creates one export file for each loop, and one export file for the top level. In the files containing the loop data there will be one row per loop iteration per respondent, so there will be several rows for each respondent. Each row will have the responseid (system generated respondent id) of the respondent and the precode of the loop id for the iteration as identifiers, and then the answers for the questions inside the loop for that specific iteration for that respondent. This means you can export a hierarchical survey without having to generate a flattened template.
  - **Single file -** Instead of exporting loop data as separate files, you can export all data belonging to a survey in one single file. Loop data will then be expanded. This means that variables will be created to represent each iteration of each question.
- **Position of Loop Variables -** only available when Single file is selected in the Loop Handling option. This allows the user to specify in which position the loop variables should be exported. The options are:
  - **As in Questionnaire -** the loop variables are positioned as the corresponding loop was placed in the questionnaire.
  - **Appended at end -** the loop variables are appended at the end of the template.
- **Triple-S Version** - the Triple-S XML standard currently has three versions. Refer to the Data Processing documentation for more information.
- **Triple-S Format** - different versions allow different formats to be used. All three versions support "Fixed width", only version 2.0 supports "Comma-separated variables".

- **Multi Question Format** - data for Multiples may be recorded as either one character per value in Bitstring format, or as a list of values in spread format. Refer to the Data Processing documentation for more information.

    o **Bitstring format** - data is recorded with one character per category of the corresponding variable. A character '1' is used to signify that a category has been selected, a character '0' signifies that a category is not selected. The category value refers to the relative position of the 0/1 code in the data field, thus a category value of 9 will always refer to the code in the 9th location of the data field even if some lower category values have not been defined.

    o **Spread** - data is recorded as a series of sub-fields, each containing one category value of the variable. The category value is recorded as an integer number as described in the <values> element. The number 0 must be used to represent sub-fields that are not needed. The data sub-field length is the minimum number of characters required to represent the largest value in the values block. Thus variables with values up to 9 have a data sub-field one character long, variables with values up to 99 have a data sub-field length of 2, and so on. If any particular data value requires less than the maximum for the sub-field, it must be right justified using leading space or zero characters as padding. Data values may be stored in any or all sub-fields.

- **Truncate Open Ends -** For Open Ends (Open Text questions with no field width specified), it is recommended to truncate texts to improve performance. If a number of characters is specified for the Open Ends Width, texts longer than this limit, if any, will automatically be truncated. If No Truncation (Full Length) is selected, the whole text will be imported/exported, but the task will take significantly longer to execute.
- **Files to include -** select which files are to be included in the export; Schema and data, Schema only, or Data only.
- **Data File Encoding** - to support the export of open text answers in surveys using Unicode (for example Chinese), you can choose the Character Encoding of the Export files. Choose between ANSI (default), Unicode or UTF-8 character encoding. This property defines the encoding for the data file.
- **Schema File Encoding** - to support the export of open text answers in surveys using Unicode (for example Chinese), you can choose the Character Encoding of the Export files. Choose between ANSI, Unicode or UTF-8 character encoding (default). This property defines the encoding for the schema file.
- **Data Only, no schema** - a Triple-S export will normally comprise two files; the data file and the schema file. However if for example you are performing a recurring task, you may not need to export the schema every time. Check this box if you wish to export only the data file.
- **Recode Multis -** check this box to recode value codes for non-sequential multi variables. For example, a multi variable with the answer codes 1, 2, and 99 will normally use 99 positions in the export, although only three are actually required. Check the box to recode the variables such that they will have the value codes 1, 2 and 3. The variable will then use only three positions. If you have many multi variables with non sequential codes, selecting Recode Multis will greatly reduce the size of the exported file.
- **Variables to Include** - you can build templates to choose a subset of data fields for your exports. Check the box, then select the template you wish to use.
- **Text in Labels -** when the Variables to include (Survey Data Template) option above is selected, the Text in Labels option becomes available. Here you can select whether you wish to export the column labels from the template or from the survey (the labels can be modified in the template - see the Data Processing User Guide for further details).
- **Exclude Hierarchy / Table Lookup Labels** - check to exclude labels from the export.
- **Override Filename -** allows you to override the system-generated file name. Tick this checkbox to open the file name text-box. Here you can edit the system-generated name (see APPENDIX F: EXPORT FILENAME DYNAMIC VALUES on page 866 for more information). Note that when exporting Survey Data to the FTP server in Survey Data > Exports or Data Processing rules, the Override Filename option accepts relative paths, as for example "..\..\myftpfile_in_another_folder.txt". In this case the file will not be stored in the default folder ("ProjectsData\p123123" or "RulesData\RuleN"), but rather directly under the (Company) Download folder.

Note: The '_^PROJECTID^_' part of the name will be replaced by the real survey id during rule execution. Default is ^PROJECTID^_^USERID^_^TASKID^ (if Date Filter is used, then ^START^ and ^END^ will also be included). ^PROJECTID^ is only "required" when executing a rule; it is not "required" when running an export using the Export GUI.

- **Export language** - in the event the survey is multi-lingual, select the survey language version to be exported.
- **Text in Question Labels -** select the text you wish to be included as the question labels. The options are:
    - **Text only -** the label element will contain the question id followed by the text of the question, separated by a colon.
    - **Title only -** the label element will contain the question id followed by the title of the question, separated by a colon.
    - **Title and Text -** the label element will contain the question id followed by a colon, then the question title followed by the question text, these separated by a hyphen.
    - **Question ID -** the label element will contain only the question id.

Note: As the engine that is used for the exports requires that the column titles are unique, and in Professional Authoring question titles can be the same on different questions, the question id is included first for all question label options.

- **Text in Answer Element Labels -** allows you to specify whether the Answer element of a Multi / Grid / Open Text List / Numeric List Question is to be positioned in front of the Question label, after the Question label or without the Question label when exporting survey data or when generating a Survey Data Template which can be used for a survey data export. The content of the Question label depends on the Text in Question Labels setting, which allows you to specify whether you want the Question ID, Question text, Question title or Question text and Title exported. Select the text you wish to be included as the answer labels. The options are:
    - **Answer (Question Label)** - the question label is placed after the answer element.
    - **Question Label (Answer) -** the question label is placed before the answer element.
    - **Answer -** the answer element is placed without the question label.

When you have made the appropriate selections, click **Next** to go to the third stage of the dialog.

27.3.2.4.1. Confirmit Tags

Confirmit accepts numbers, letters and underscore (_) in codes on Multi questions, but the Triple-S multiple variable type only accepts numeric codes. On Multi questions with non-numeric characters in the codes, the codes will be recoded into numeric characters for the Triple-S codes in the answer list (both in schema and data).

Note: If you only ever use numeric codes in Multi questions, you will avoid this issue.

However, when moving data between Confirmit surveys, or out of Confirmit for external changes and then back in to a Confirmit survey again, the link to the original codes in the Confirmit survey must be retained. Confirmit has therefore made an extension to Triple-S. A multiple variable with non-numeric codes will then look as follows in the schema (template) file:

```
<variable ident="1" type="multiple">
<name>q1</name>
<label>Car brands</label>
<position start="100" finish="105" />
<values>
<value code="1" confirmit:code="a">Ford</value>
<value code="2" confirmit:code="b">Chrysler</value>
<value code="3" confirmit:code="c">Volvo</value>
<value code="4" confirmit:code="d">BMW</value>
<value code="5" confirmit:code="e">Honda</value>
<value code="6" confirmit:code="f">Toyota</value>
</values>
</variable>
```

When exporting the template, you may choose not to include these Confirmit tags in the file in case it causes issues for some importers. To do this, check the **Exclude Confirmit tags** box when exporting a template.

27.3.2.5. Step 2 when the Export Format is SPSS SPS/DAT or SAV

Note: Use of the SPSS Export feature in Data Processing and Data Central is subject to (i) your acceptance of the additional terms and conditions set forth under Home > Help > Third Party Software in Confirmit, or the screen license in Data Central; and (ii) the continued validity of a Freeware License from SPSS Inc. The dlls used for enabling SPSS exports in Data Central and Data Processing are the copyright of SPSS Inc, © SPSS Inc.

Important:
For Confirmit SaaS users: Confirmit has not been authorized by the vendor of the SPSS Dimensions Data Model to obtain a license thereof. Due to this, Confirmit is not able to support the import of SPSS data sources via the SPSS Dimensions Data model (e.g. Quanvert, Quancept, SPSS SAV, SurveyCraft).
For Confirmit On-Premise users: In order for your company to take advantage of processing SPSS data (e.g. Quanvert, Quancept, SPSS SAV, SurveyCraft) with Confirmit Data Central, your company must obtain a license for the SPSS Dimensions Data Model from an authorized vendor.
For all users: Given Confirmit has not been authorized to obtain a license of the SPSS Dimensions Data Model, Confirmit is not able to test or reproduce issues related thereto. Confirmit therefore expressly disclaims any and all warranties pertaining to operations you may perform related to SPSS data, such as but not limited to, loading SPSS data to / from Confirmit, or running data through the SPSS Data Model on Confirmit Data Central.

If you have selected the Format in step 1 of the procedure to be SPSS DAT, then the dialog that opens in step 2 will be as shown below. Note that if you have selected SPSS (sav), the dialog will be similar but without the Character Encoding and Decimal Delimiter fields.

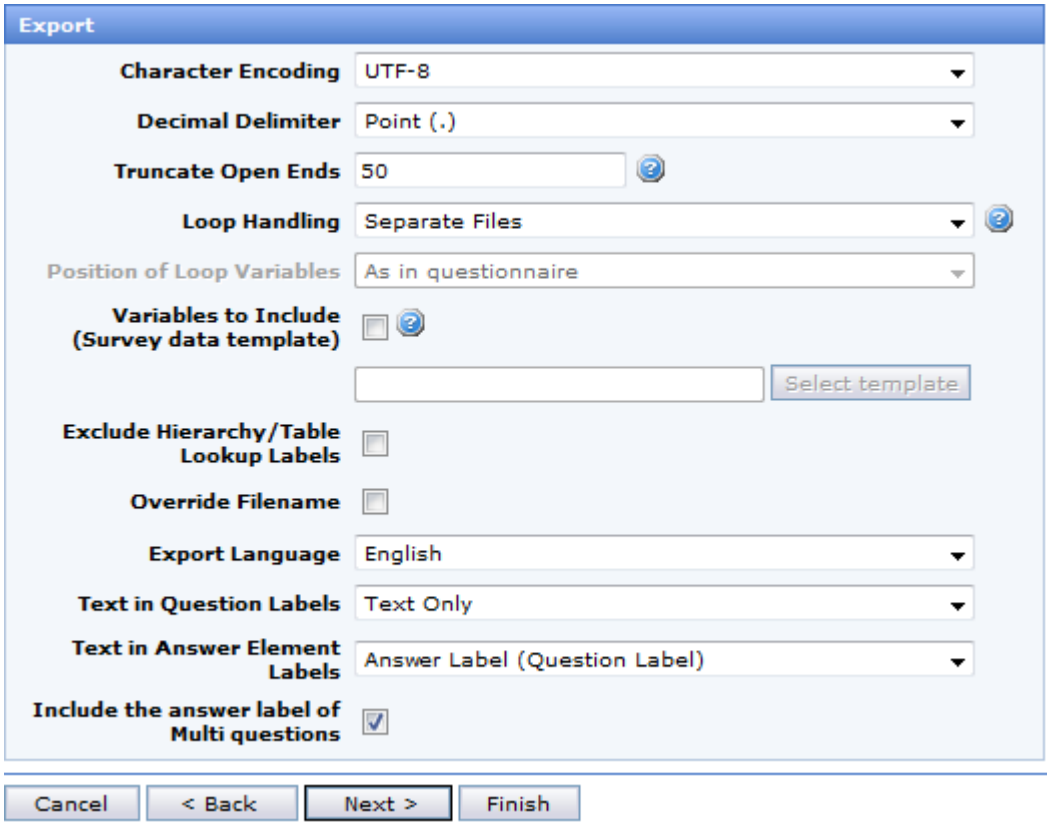


Figure 883 The second stage of the Export dialog for an SPSS DAT file export

Make the appropriate selections. The options are as follows:

- **Character Encoding -** [not available for SAV] defines the encoding for the data file. Choose between ANSI (default) and Unicode character encoding.

Important
The customer must enable the Unicode Character Encoding Option in SPSS itself before loading the sps/dat file.

- **Decimal Delimiter -** [not available for SAV] select the character to be used as the decimal point.
- **Truncate Open Ends -** For Open Ends (Open Text questions with no field width specified), it is recommended to truncate texts to improve performance. If a number of characters is specified for the Open Ends Width, texts longer than this limit, if any, will automatically be truncated. If No Truncation (Full Length) is selected, the whole text will be imported/exported, but the task will take significantly longer to execute.

o **Loop Handling -** this option is only available if the survey included loops. Here you specify how loops are to be handled for the export. The options are:**Separate files -** the default export format for loops creates one export file for each loop, and one export file for the top level. In the files containing the loop data there will be one row per loop iteration per respondent, so there will be several rows for each respondent. Each row will have the responseid (system generated respondent id) of the respondent and the precode of the loop id for the iteration as identifiers, and then the answers for the questions inside the loop for that specific iteration for that respondent. This means you can export a hierarchical survey without having to generate a flattened template.

  o **Single file -** Instead of exporting loop data as separate files, you can export all data belonging to a survey in one single file. Loop data will then be expanded. This means that variables will be created to represent each iteration of each question.

- **Position of Loop Variables -** only available when Single file is selected in the Loop Handling option. This allows the user to specify in which position the loop variables should be exported. The options are:

  o **As in Questionnaire -** the loop variables are positioned as the corresponding loop was placed in the questionnaire.

  o **Appended at end -** the loop variables are appended at the end of the template.

- **Variables to include** - you can build templates to choose a subset of data fields for your exports. If you check this box, select the template you wish to use.
- **Exclude Hierarchy / Table Lookup Labels** - check to exclude labels from the export.
- **Override Filename -** allows you to override the system-generated file name. Tick this checkbox to open the file name text-box. Here you can edit the system-generated name (see APPENDIX F: EXPORT FILENAME DYNAMIC VALUES on page 866 for more information). Note that when exporting Survey Data to the FTP server in Survey Data > Exports or Data Processing rules, the Override Filename option accepts relative paths, as for example "..\..\myftpfile_in_another_folder.txt". In this case the file will not be stored in the default folder ("ProjectsData\p123123" or "RulesData\RuleN"), but rather directly under the (Company) Download folder.

Note: The '_^PROJECTID^_' part of the name will be replaced by the real survey id during the export. Default is ^PROJECTID^_^USERID^_^TASKID^ (if Date Filter is used, then ^START^ and ^END^ will also be included). ^PROJECTID^ is only "required" when executing a rule; it is not "required" when running an export using the Export GUI.

- **Export language** - in the event the survey is multi-lingual, select the survey language version to be exported.
- **Text in Question Labels -** select the text you wish to be included as the question labels. The options are:

  o **Text only -** the label element will contain the question id followed by the text of the question, separated by a colon.

  o **Title only -** the label element will contain the question id followed by the title of the question, separated by a colon.

  o **Title and Text -** the label element will contain the question id followed by a colon, then the question title followed by the question text, these separated by a hyphen.

  o **Question ID -** the label element will contain only the question id.

Note: As the engine that is used for the exports requires that the column titles are unique, and in Professional Authoring question titles can be the same on different questions, the question id is included first for all question label options.

- **Text in Answer Element Labels -** allows you to specify whether the Answer element of a Grid / Open Text List / Numeric List Question is to be positioned in front of the Question label, after the Question label or without the Question label when exporting survey data or when generating a Survey Data Template which can be used for a survey data export. The content of the Question label depends on the Text in Question Labels setting, which allows you to specify whether you want the Question ID, Question text, Question title or Question text and Title exported. Select the text you wish to be included as the answer labels. The options are:
    - **Answer (Question Label)** - the question label is placed after the answer element.
    - **Question Label (Answer) -** the question label is placed before the answer element.
    - **Answer -** the answer element is placed without the question label.
- **Include the answer label of Multi questions -** allows you to specify whether answer labels will be exported as value labels in the SPSS file.

Note: When running exports with survey data templates, this option can only be activated if the Multi variables in the Survey Data Template are not split. If this option is selected, the answer labels are exported as value labels. If it is not selected, the value labels will be empty. If the Multi variables are split in the Survey Data Template, the value labels will be empty by default.

When you have made the appropriate selections, click **Next** to go to the third stage of the dialog.

Note: Confirmit now supports very long text strings (up to 32767 bytes, supported from SPSS version 13), and long value labels (up to 120 bytes, supported from SPSS version 14).

27.3.2.6. Step 2 when the Export Format is Quantum or SAS

If you have selected the Format in step 1 of the procedure to be Quantum or SAS, then the dialog that opens in step 2 will be as shown below.

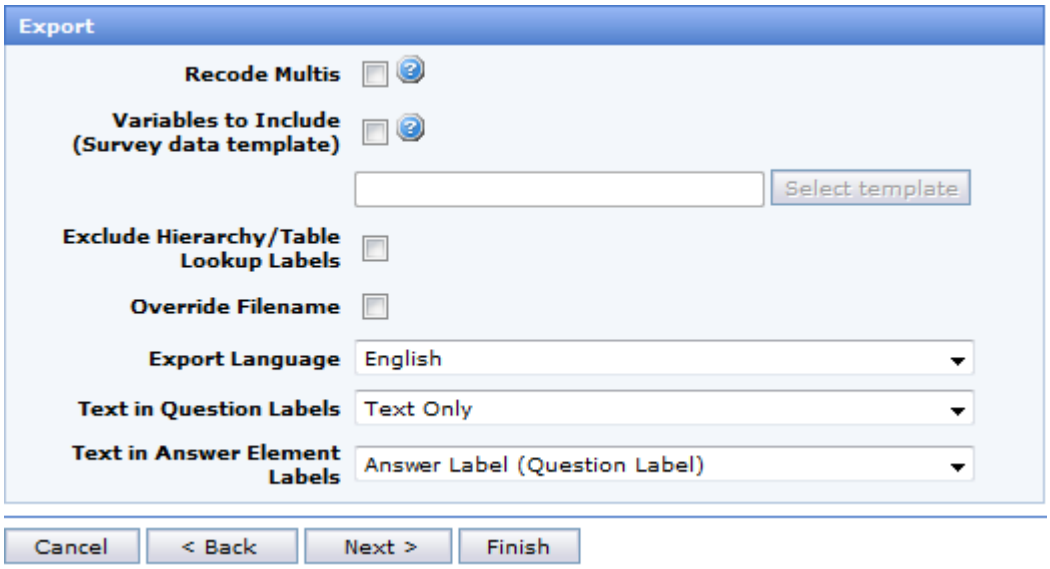


Figure 884 The second stage of the Export dialog for a Quantum or SAS file export

Be aware that from Confirmit v17, for the SAS export, textual codes are exported. For example, a question with the codes **cola,pepsi** will be exported as

```
VALUE Q1F
'cola' = 'Coca Cola'
'pepsi' = 'Pepsi Cola'
```

Make the appropriate selections. The options are as follows:

- **Loop Handling -** this option is only available if the survey included loops. Here you specify how loops are to be handled for the export. The options are:**Separate files -** the default export format for loops creates one export file for each loop, and one export file for the top level. In the files containing the loop data there will be one row per loop iteration per respondent, so there will be several rows for each respondent. Each row will have the responseid (system generated respondent id) of the respondent and the precode of the loop id for the iteration as identifiers, and then the answers for the questions inside the loop for that specific iteration for that respondent. This means you can export a hierarchical survey without having to generate a flattened template.
    - **Single file -** Instead of exporting loop data as separate files, you can export all data belonging to a survey in one single file. Loop data will then be expanded. This means that variables will be created to represent each iteration of each question.
- **Loop Position -** only available when Single file is selected in the Loop Handling option. This allows the user to specify in which position the loop variables should be exported. The options are:
    - **As in Questionnaire -** the loop variables are positioned as the corresponding loop was placed in the questionnaire.
    - **Appended at end -** the loop variables are appended at the end of the template.
- **Recode Multis -** check this box to recode value codes for non-sequential multi variables. For example, a multi variable with the answer codes 1, 2, and 99 will normally use 99 positions in the export, although only three are actually required. Check the box to recode the variables such that they will have the value codes 1, 2 and 3. The variable will then use only three positions. If you have many multi variables with non sequential codes, selecting Recode Multis will greatly reduce the size of the exported file.
- **Variables to include** - you can build templates to choose a subset of data fields for your exports. If you check this box, select the template you wish to use.
- **Exclude Hierarchy / Table Lookup Labels** - check to exclude labels from the export.
- **Override Filename -** allows you to override the system-generated file name. Tick this checkbox to open the file name text-box. Here you can edit the system-generated name (see APPENDIX F: EXPORT FILENAME DYNAMIC VALUES on page 866 for more information). Note that when exporting Survey Data to the FTP server in Survey Data > Exports or Data Processing rules, the Override Filename option accepts relative paths, as for example “..\..\myftpfile_in_another_folder.txt”. In this case the file will not be stored in the default folder (“ProjectsData\p123123” or “RulesData\RuleN”), but rather directly under the (Company) Download folder.

Note: The '_^PROJECTID^_' part of the name will be replaced by the real survey id during the export. Default is ^PROJECTID^_^USERID^_^TASKID^ (if Date Filter is used, then ^START^ and ^END^ will also be included). ^PROJECTID^ is only "required" when executing a rule; it is not "required" when running an export using the Export GUI.

- **Export language** - in the event the survey is multi-lingual, select the survey language version to be exported.
- **Text in Question Labels -** select the text you wish to be included as the question labels. The options are:
    - **Text only -** the label element will contain the question id followed by the text of the question, separated by a colon.
    - **Title only -** the label element will contain the question id followed by the title of the question, separated by a colon.
    - **Title and Text -** the label element will contain the question id followed by a colon, then the question title followed by the question text, these separated by a hyphen.
    - **Question ID -** the label element will contain only the question id.

Note: As the engine that is used for the exports requires that the column titles are unique, and in Professional Authoring question titles can be the same on different questions, the question id is included first for all question label options.

- **Text in Answer Element Labels -** allows you to specify whether the Answer element of a Grid / Open Text List / Numeric List Question is to be positioned in front of the Question label, after the Question label or without the Question label when exporting survey data or when generating a Survey Data Template which can be used for a survey data export. The content of the Question label depends on the Text in Question Labels setting, which allows you to specify whether you want the Question ID, Question text, Question title or Question text and Title exported. Select the text you wish to be included as the answer labels. The options are:
    - **Answer (Question Label)** - the question label is placed after the answer element.
    - **Question Label (Answer) -** the question label is placed before the answer element.
    - **Answer -** the answer element is placed without the question label.

When you have made the appropriate selections, click **Next** to go to the third stage of the dialog.

27.3.2.7. Step 2 when the Export Format is Fixed Width File

If you have selected the Format in step 1 of the procedure to be Fixed Width File, then the dialog that opens in step 2 will be as shown below.

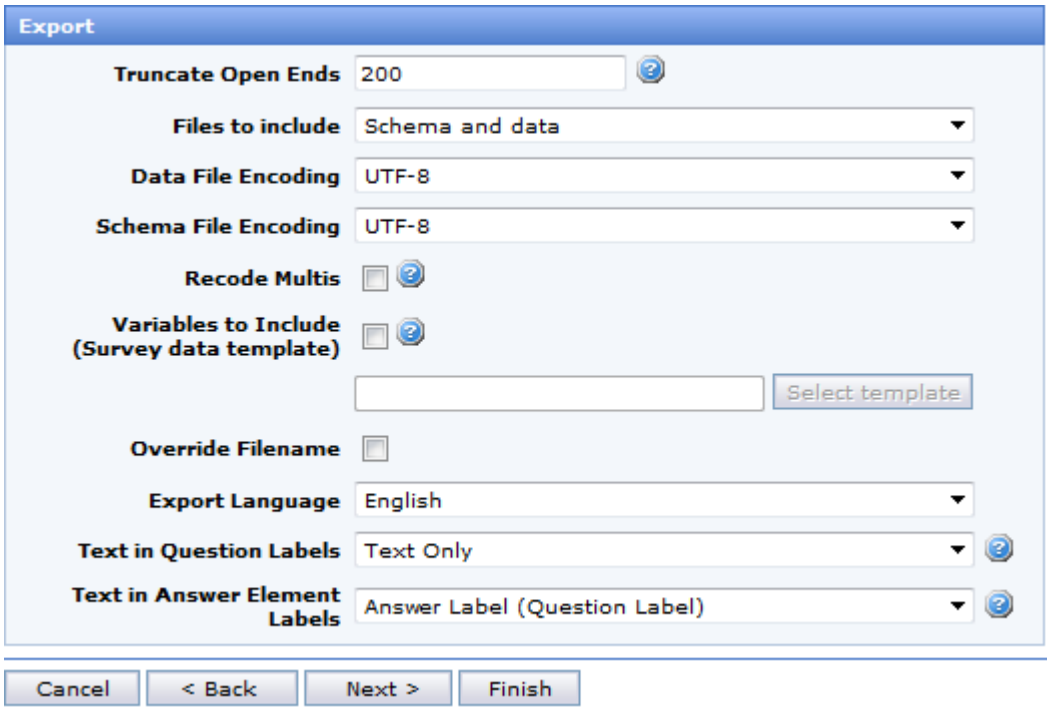


Figure 885 The second stage of the Export dialog for a Fixed Width File export

Make the appropriate selections. The options are as follows:

- **Truncate Open Ends -** For Open Ends (Open Text questions with no field width specified), it is recommended to truncate texts to improve performance. If a number of characters is specified for the Open Ends Width, texts longer than this limit, if any, will automatically be truncated. If No Truncation (Full Length) is selected, the whole text will be imported/exported, but the task will take significantly longer to execute.
- **Files to include -** select which files are to be included in the export; Schema and data, Schema only, or Data only.

- **Data File Encoding** - to support the export of open text answers in surveys using Unicode (for example Chinese), you can choose the Character Encoding of the Export files. Choose between ANSI (default), Unicode or UTF-8 character encoding. This property defines the encoding for the data file.
- **Schema File Encoding** - to support the export of open text answers in surveys using Unicode (for example Chinese), you can choose the Character Encoding of the Export files. Choose between ANSI, Unicode or UTF-8 character encoding (default). This property defines the encoding for the schema file.

o **Loop Handling -** this option is only available if the survey included loops. Here you specify how loops are to be handled for the export. The options are:**Separate files -** the default export format for loops creates one export file for each loop, and one export file for the top level. In the files containing the loop data there will be one row per loop iteration per respondent, so there will be several rows for each respondent. Each row will have the responseid (system generated respondent id) of the respondent and the precode of the loop id for the iteration as identifiers, and then the answers for the questions inside the loop for that specific iteration for that respondent. This means you can export a hierarchical survey without having to generate a flattened template.

  o **Single file -** Instead of exporting loop data as separate files, you can export all data belonging to a survey in one single file. Loop data will then be expanded. This means that variables will be created to represent each iteration of each question.

- **Loop Position -** only available when Single file is selected in the Loop Handling option. This allows the user to specify in which position the loop variables should be exported. The options are:

  o **As in Questionnaire -** the loop variables are positioned as the corresponding loop was placed in the questionnaire.

  o **Appended at end -** the loop variables are appended at the end of the template.

- **Single File Export -** for surveys with loops, instead of exporting the loop data in different files, you can export all data belonging to a survey in one single file.
- **Recode Multis -** check this box to recode value codes for non-sequential multi variables. For example, a multi variable with the answer codes 1, 2, and 99 will normally use 99 positions in the export, although only three are actually required. Check the box to recode the variables such that they will have the value codes 1, 2 and 3. The variable will then use only three positions. If you have many multi variables with non sequential codes, selecting Recode Multis will greatly reduce the size of the exported file.
- **Variables to include** - you can build templates to choose a subset of data fields for your exports. Check the box, then select the template you wish to use.
- **Override Filename -** allows you to override the system-generated file name. Tick this checkbox to open the file name text-box. Here you can edit the system-generated name (see APPENDIX F: EXPORT FILENAME DYNAMIC VALUES on page 866 for more information). Note that when exporting Survey Data to the FTP server in Survey Data > Exports or Data Processing rules, the Override Filename option accepts relative paths, as for example "..\..\myftpfile_in_another_folder.txt". In this case the file will not be stored in the default folder ("ProjectsData\p123123" or "RulesData\RuleN"), but rather directly under the (Company) Download folder.

Note: The '_^PROJECTID^_' part of the name will be replaced by the real survey id during the export. Default is ^PROJECTID^_^USERID^_^TASKID^ (if Date Filter is used, then ^START^ and ^END^ will also be included). ^PROJECTID^ is only "required" when executing a rule; it is not "required" when running an export using the Export GUI.

- **Export language** - in the event the survey is multi-lingual, select the survey language version to be exported.
- **Text in Question Labels -** select the text you wish to be included as the question labels. The options are:

  o **Text only -** the label element will contain the question id followed by the text of the question, separated by a colon.

  o **Title only -** the label element will contain the question id followed by the title of the question, separated by a colon.

  o **Title and Text -** the label element will contain the question id followed by a colon, then the question title followed by the question text, these separated by a hyphen.

  o **Question ID -** the label element will contain only the question id.

Note: As the engine that is used for the exports requires that the column titles are unique, and in Professional Authoring question titles can be the same on different questions, the question id is included first for all question label options.

- **Text in Answer Element Labels -** allows you to specify whether the Answer element of a Multi / Grid / Open Text List / Numeric List Question is to be positioned in front of the Question label, after the Question label or without the Question label when exporting survey data or when generating a Survey Data Template which can be used for a survey data export. The content of the Question label depends on the Text in Question Labels setting, which allows you to specify whether you want the Question ID, Question text, Question title or Question text and Title exported. Select the text you wish to be included as the answer labels. The options are:
    - **Answer (Question Label)** - the question label is placed after the answer element.
    - **Question Label (Answer) -** the question label is placed before the answer element.
    - **Answer -** the answer element is placed without the question label.

When you have made the appropriate selections, click **Next** to go to the third stage of the dialog.

27.3.2.8. Exporting Data - Step 3

The third stage of the Export dialog opens. This dialog is common for all export formats.

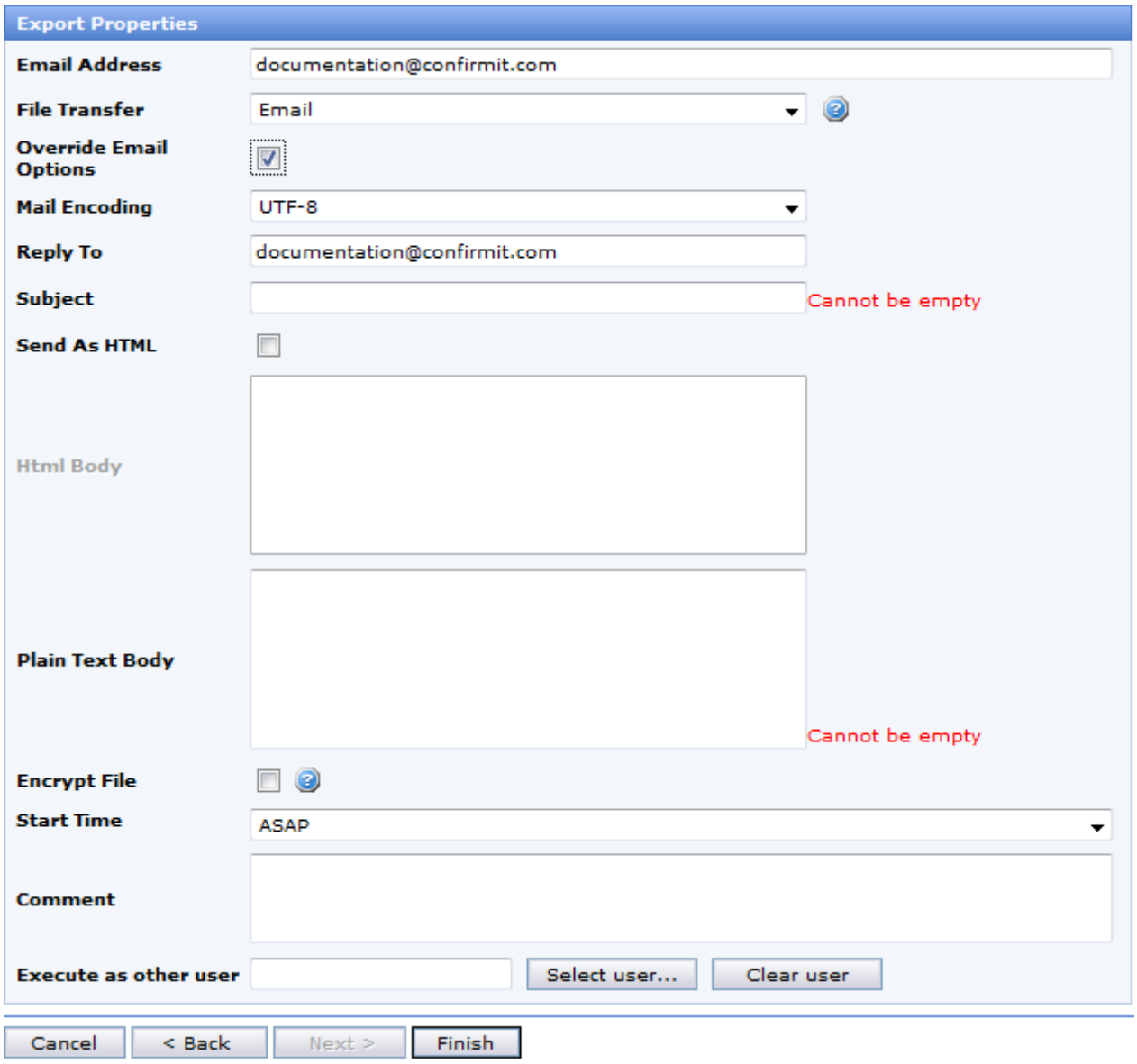


Figure 886 The third stage of the Export dialog

Make the appropriate selections. The information displayed, and the options available, are as follows:

- **Email Address -** you can send the export to any email address - type the appropriate address into the field. The default is your address.
- **File transfer** - export files can either be sent by email or placed on an FTP server. FTP is the recommended option for large volumes of data, since emails with large attachments may be blocked. FTP can allow automation of data flows, since files can then be picked up automatically by another system/process. Note that your company must license the FTP add-on for this option to be available.
- **Override Email Options -** when selected, allows you to override the standard export email options and customize both the subject and the email that will be sent to the export recipient. Checking this box displays a number of additional options.
- **Encrypt file** - data transfer encryption functionality makes it possible to perform secure data exports from Confirmit. The encrypted files can then be either ordered by email or sent to the FTP server for downloading. The users will have to decrypt the files using their private PGP encryption keys.

- **Start Time** - the time when the export task is to commence. You can select ASAP (as soon as possible) or schedule it for a later time. If you schedule the task for later, then when you click **Finish**, a Recurrence setup page opens (see The Task Properties Recurrence Tab on page 60 for more information).
- **Comment -** you can add comments that are included in the export email.

Note: In the event the user has the necessary permissions, they can perform the export as a different user. The Execute as Other User field is then available below the Comment field (see Executing Rules as Other User on page 827 for more information).

When you are ready, click **Finish**.

The Rule Executer page opens, and the task will run when appropriate. Here you can see the status of the task, and select to be notified on completion if desired. You can proceed with other tasks as soon as you have clicked **Finish**.

Note: A user with the Standard permission (see Standard Users on page 3 for more information) has a simplified procedure with fewer steps and options in the wizard.

27.3.3. Importing Data

Response data from other systems or from other Confirmit surveys can be imported into a Confirmit survey. This enables you for example to use Confirmit Reportal to report on surveys created using another system. You may also export Confirmit data and perform modifications on the data outside Confirmit, and then re-import the data.

Note that the dialog and options for step 2 of the procedure will depend on the format of the file that is to be imported, which you select in step 1.

If the imported file contains errors, you will receive an email containing two files; one file contains the invalid records, and the other contains an explanation of why the records are invalid. If any invalid columns are discovered during the import, these being system columns or columns not found in the meta data, these errors will be logged in the task log.

Important
If a survey data import task is to be recurring, it must be set to recurring before it is executed for the first time (set start time to "Schedule for later execution" and on next page set it to recurring).

Important
If a survey has loops and you wish to import data to the survey then you can only import Separate Files; Single Files cannot be imported. So if you are planning to import data to a survey with loops, then you must choose the Separate File export option. For example if you wish to perform data cleaning, you must export the data to Separate File, clean the data, then import the Separate file.

27.3.3.1. Key Fields

When you import data, you must provide a key field that is used as a unique identifier. The key field identifies the records or responses. Typical key fields can be a user id such as a member or customer number, or the system-provided "respid" or "responseid". The key field must exist in both the import file(s) and the database.

You can use Single, Numeric and Open Text variables as the key field. Note that the question must be Indexed in the Question Properties, and an Open Text question must have a Field Width specified in order for the Indexed property to be visible.

Data can be "updated" or "appended". If you select “append” the new response data will be added to the already existing data, if any. If there is a match in the key field between data in the import file and data already in the survey's database, that data will not be added (the original data in the database will be kept). If you select “update” the response data that has a matching key field in the survey's database will be updated. Records in the import file that have no matching key field in the database will be added to the database.

The search for matching values in the key field will also involve matching, and possibly also appending, in the respondent list. This means that importing can also be conducted on surveys that either are live or where data collection will continue later, as well as to panels. If there is no match for the key field in the response data, the import program will move on to checking the respondent list. If there is a match in the respondent list, the import program will fetch the respid from the respondent list and append the import data with that respid into the response data. It will use the respid from the respondent list even if something different than respid is used as key field, and the import files have respids and these differ from those in the respondent list. This is due to respid being an auto-generated, unchangeable id in Confirmit. If there is no match for the key field neither in the response data nor the respondent list, and "append" is chosen, new records are added to the respondent list. This will auto-generate new respids that will probably be different from those in the import file.

27.3.3.2. Importing Data - Step 1

To import data:

1. Go to the **Survey Data > Imports** menu command.

   The Data Import dialog opens.

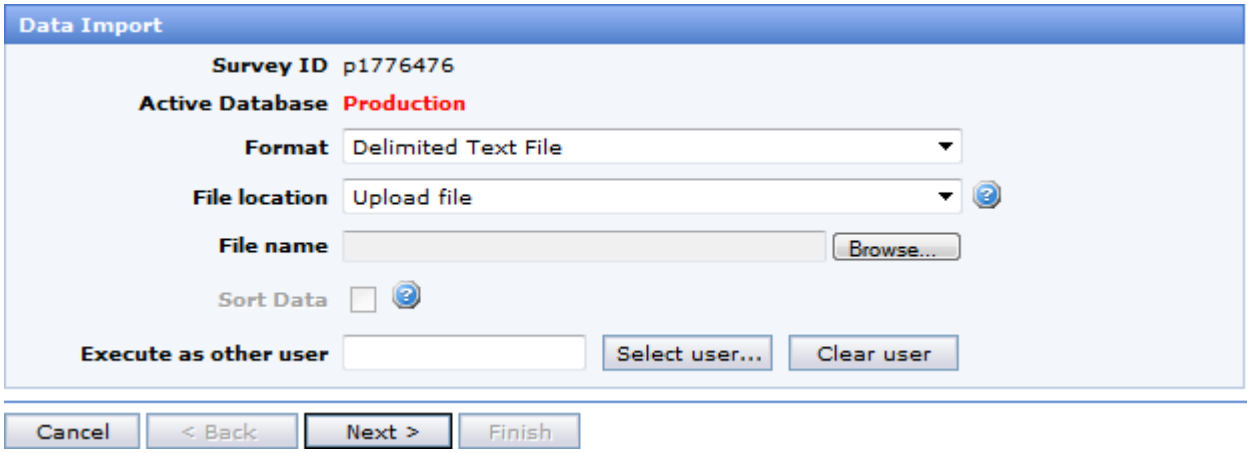


Figure 887 The Data Import dialog

The information displayed, and the options available, are as follows:

- **Survey Id** - the identification number of the survey you are currently working on.
- **Active Database** - the currently selected database. To change this, go to the Database selection field in the lower-right corner of the Confirmit window.
- **Format** - the format of the file that is to be imported. Note that the fields in the dialog displayed in the next step of the Import procedure will differ depending on the format you select here.
- **File location** - select the source of the file. Import files can be uploaded directly in the browser, placed on a Confirmit FTP server and retrieved from there, or imported from an external FTP server.

  o If you wish to upload the source file from your server network (perhaps the file has been stored there after having been sent to you via email), then select this option and click **Browse**. A standard browser window opens, in which you can search for and select the file you wish to upload.

  o **FTP** - if your company has licensed the FTP add-on and it has been enabled, this option will be active. You can then fetch the file to be uploaded from Confirmit's FTP location. Type in the file name. Confirmit's FTP address is specified as part of the enabling procedure and cannot be changed. Note that fetching from FTP can allow automation of data flows, since files can then be picked up automatically.

  o **External FTP -** [only available via the FTP add-on] this option enables files to be taken from an external FTP location. In this case the file name, Folder Name (at the external FTP location), the Host Name, and the FTP User name and Password must be specified. The **Verify connection** button is provided to allow you to check whether the FTP settings are correct.

Note: When importing from External FTP, the user interface does not know the status of the file. A message will therefore be presented stating that the file does not exist. This message can be ignored.

Note: Confirmit FTP imports support the use of wildcards in the file name. * gives zero or more characters, ? gives exactly zero or one character. For example, myFile?_*.txt - will match myFile1_20082012.txt and myFile2_22082012.txt.

- **Use SFTP... -** select this option if you wish to use protected protocol SFTP (SSH File Transfer Protocol).
- **File handling** - if you have selected one of the FTP options, select whether you wish to copy the file from the server/FTP site or move it (delete it from the site).
- **Sort Data** - in Excel import, data in all sheets must be sorted by key columns. If the data in your import file is not sorted, check this box to instruct the task execution to sort data in all the Excel sheets automatically. Note that sorting of large data volumes may take some time.

Note: In the event the user has the necessary permissions, they can perform the import as a different user. The Execute as Other User field is then available below the File Handling field (see Executing Rules as Other User on page 827 for more information).

2. Select the format of the file to be imported then select the import source.
3. If you are uploading the file from your local PC, click **Browse** to open a standard Windows file browser then browse to and select the file to be uploaded.

   If you are picking up the file from Confirmit's or an external FTP location, type the file name and other relevant data into the appropriate fields.

2. Click **Next** to progress to the next step in the procedure.

Note that the options available in the dialog in step 2 will depend on the import format you have selected in step 1.

27.3.3.3. Step 2 when the Import Format is Excel

If you are importing an Excel file, when you click **Next** in the first stage of the procedure, the Import Properties dialog box opens as shown.

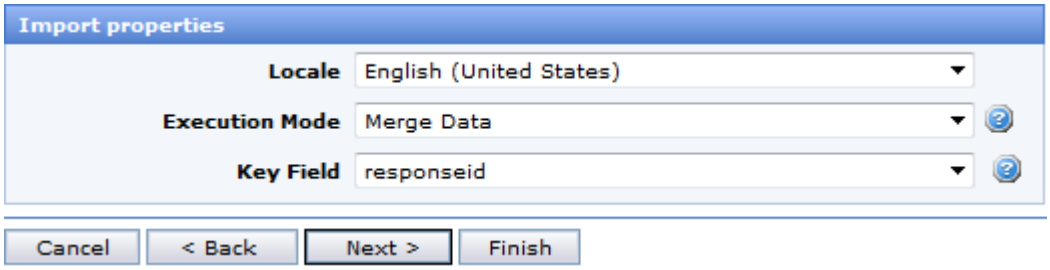


Figure 888 The second stage of the Import dialog, for an Excel import

The options available are as follows:

- **Locale** - determines the formatting of elements such as numbers (decimal point) and dates/times. Select the locale appropriate to the formatting used in the file.
- **Execution mode** - select how the data is to be added to the target database.

  You can choose between three modes for importing the data, listed below. In all the modes the user will be asked to provide a key (see Key field below). The keys available are respid, responseid, and any field in the survey database that has an index (see The General Tab on page 251 for more information). To create an index on a field in a survey database, go to the question properties of the field and set the "Indexed" property (available on single and open text questions with a field width set), and then re-launch the survey. By employing this setting, you can then use for example email address, membership number etc. as a key. The rule executer reads the value of the selected key field in the incoming data file and checks to see if a row with the same key already exists in the target.

- **Merge data** - all the data from the source will be added to the target survey database. Any records in the source that already exist in the target survey database will be updated, and any records in the source that do not currently exist in the target survey database will be added to the target survey database.
- **Append data** - any records in the source that do not exist in the target survey database will be added to the target survey database. Any records in the source that already exist in the target survey database will be ignored.
- **Update data** - any records in the source that already exist in the target survey database will be updated with values from the source. Any records in the source that do not already exist in the target survey database will be ignored.

In these scenarios, when new records are added, the new records are inserted both in the response data and in the respondent table (respondent list).

- **Key field** - the key field is used as a unique identifier to indicate which records are to be updated and which are to be appended. The key field is also used to map the responses in the top-level file with the responses in loop response files. The key field must exist in both the import file(s) and the database.

  System variables respid and responseid and all survey variables with the "Indexed" property set, will be displayed in the "Key field" drop-down. You may choose any survey variable that has a unique value for each respondent as key field. The key field should either be one of the system-provided ids (respid or responseid), or an open text question with a defined field width. Examples of key fields could be membership number, customer id or email address.

Important: The fields respid and responseid are system-provided ids in Confirmit. When appending records (inserting records that are not already present) through data import with one of these fields as key field, the system will replace the ids you import with new system-generated ids.

Make the appropriate selections, then click **Next** to move to the next step in the procedure.

27.3.3.4. Step 2 when the Import Format is Delimited Text File

If you have selected the Format in step 1 of the procedure to be Delimited Text File, then the dialog that opens in step 2 will be as shown below.

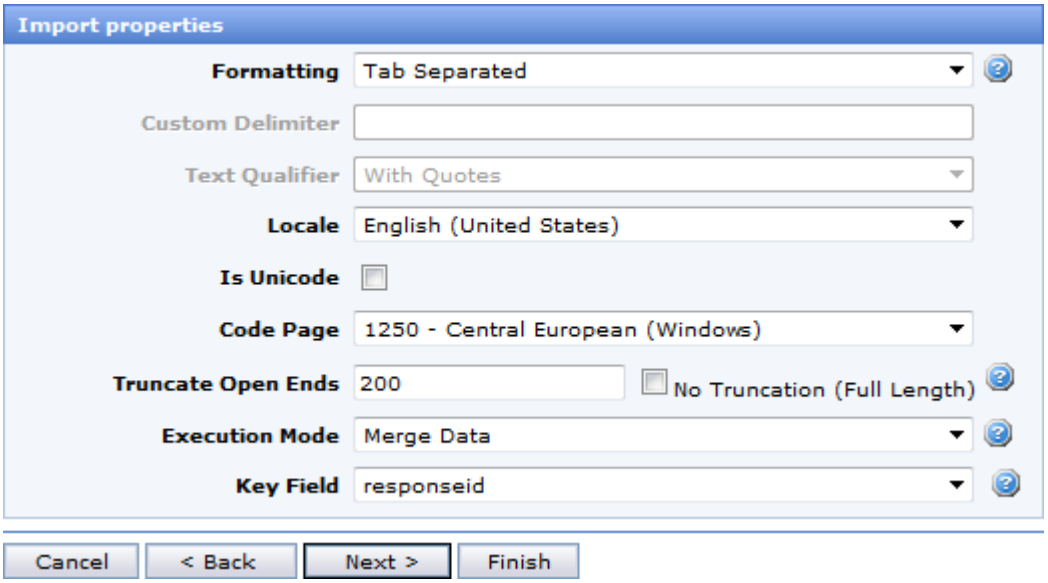


Figure 889 The second stage of the Import dialog for a Delimited Text File import

The options are as follows:

- **Formatting**- a delimiter is a sequence of one or more characters used to specify the boundary between separate, independent regions in plain text or other data stream. An example of a delimiter is the comma character in a sequence of comma-separated values. Select the delimiter that has been used in the data file to be imported. If you select "Custom", you can then define any single keyboard character.
- **Text Qualifier -** this property is only available when you select “Formatting: Comma separated”. When "Comma separated" is selected, the comma character has a special meaning; it is used to separate the different values from the different variables. However during export commas will be removed from opentext answers since in this case the character has a different meaning. Adding quotes around an answer text ensures that the text remains unchanged.
- **Locale** - determines the formatting of elements such as numbers (decimal point) and dates/times. Select the locale appropriate to the format used in the file.
- **Is Unicode** - enables the software to handle Asian languages. Unicode is recommended for files containing data in languages that use either Unicode encoding or other encoding. The user can choose any language when designing a questionnaire.
- **Codepage** - if Unicode is not selected, choose a code page from the drop-down list.
- **Truncate Open Ends -** for Open Ends (Open Text questions with no field width specified), it is recommended to truncate texts to improve performance. If a number of characters is specified for the Open Ends Width, texts longer than this limit, if any, will automatically be truncated. If No Truncation (Full Length) is selected, the whole text will be imported/exported, but the task will take significantly longer to execute.
- **Execution mode** - select how the data is to be added to the target database.

  You can choose between three modes for importing the data, listed below. In all the modes the user will be asked to provide a key (see Key field below). The keys available are respid, responseid, and any field in the survey database that has an index (see The General Tab on page 251 for more information). To create an index on a field in a survey database, go to the question properties of the field and set the "Indexed" property (available on single and open text questions with a field width set), and then re-launch the survey. By employing this setting, you can then use for example email address, membership number etc. as a key. The rule executer reads the value of the selected key field in the incoming data file and checks to see if a row with the same key already exists in the target.

  - **Merge data** - all the data from the source will be added to the target survey database. Any records in the source that already exist in the target survey database will be updated, and any records in the source that do not currently exist in the target survey database will be added to the target survey database.
  - **Append data** - any records in the source that do not exist in the target survey database will be added to the target survey database. Any records in the source that already exist in the target survey database will be ignored.
  - **Update data** - any records in the source that already exist in the target survey database will be updated with values from the source. Any records in the source that do not already exist in the target survey database will be ignored.

  In these scenarios, when new records are added, the new records are inserted both in the response data and in the respondent table (respondent list).
- **Key field** - the key field is used as a unique identifier to indicate which records are to be updated and which are to be appended. The key field is also used to map the responses in the top-level file with the responses in loop response files. The key field must exist in both the import file(s) and the database.

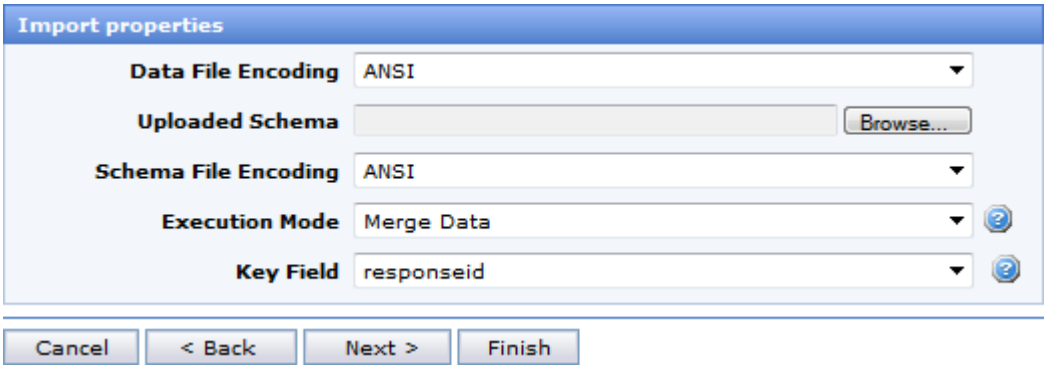
  System variables respid and responseid and all survey variables with the "Indexed" property set, will be displayed in the "Key field" drop-down. You may choose any survey variable that has a unique value for each respondent as key field. The key field should either be one of the system-provided ids (respid or responseid), or an open text question with a defined field width. Examples of key fields could be membership number, customer id or email address.

Important: The fields respid and responseid are system-provided ids in Confirmit. When appending records (inserting records that are not already present) through data import with one of these fields as key field, the system will replace the ids you import with new system-generated ids.

Make the appropriate selections, then click **Next** to move to the next step in the procedure.

27.3.3.5. Step 2 when the Import Format is Triple-S

If you are importing a Triple-S file, when you click **Next** in the first stage of the procedure, the Import Properties dialog box opens as shown.



The options available in this dialog are as follows:

- **Data file encoding** - to support the import of open text answers in surveys using Unicode (for example Chinese), you can choose the Character Encoding of the Import files. Choose between ANSI (default) and Unicode character encoding. This property defines the encoding for the data file.
- **Uploaded schema** - if a schema file is to be imported, browse for it and select it here.
- **Schema file encoding** - to support the export of open text answers in surveys using Unicode (for example Chinese), you can choose the Character Encoding of the Export files. Choose between ANSI (default) and Unicode character encoding. This property defines the encoding for the schema file.
- **Execution mode** - select how the data is to be added to the target database.

  You can choose between three modes for importing the data, listed below. In all the modes the user will be asked to provide a key (see Key field below). The keys available are respid, responseid, and any field in the survey database that has an index (see The General Tab on page 251 for more information). To create an index on a field in a survey database, go to the question properties of the field and set the "Indexed" property (available on single and open text questions with a field width set), and then re-launch the survey. By employing this setting, you can then use for example email address, membership number etc. as a key. The rule executer reads the value of the selected key field in the incoming data file and checks to see if a row with the same key already exists in the target.

  - **Update data** - any records in the source that already exist in the target survey database will be updated with values from the source. Any records in the source that do not already exist in the target survey database will be ignored.
  - **Append data** - any records in the source that do not exist in the target survey database will be added to the target survey database. Any records in the source that already exist in the target survey database will be ignored.
  - **Merge data** - all the data from the source will be added to the target survey database. Any records in the source that already exist in the target survey database will be updated, and any records in the source that do not currently exist in the target survey database will be added to the target survey database.

  In these scenarios, when new records are added, the new records are inserted both in the response data and in the respondent table (respondent list).

- **Key field** - the key field is used as a unique identifier to indicate which records are to be updated and which are to be appended. The key field is also used to map the responses in the top-level file with the responses in loop response files. The key field must exist in both the import file(s) and the database.

System variables respid and responseid and all survey variables with the "Indexed" property set, will be displayed in the "Key field" drop-down. You may choose any survey variable that has a unique value for each respondent as key field. The key field should either be one of the system-provided ids (respid or responseid), or an open text question with a defined field width. Examples of key fields could be membership number, customer id or email address.

Important: The fields respid and responseid are system-provided ids in Confirmit. When appending records (inserting records that are not already present) through data import with one of these fields as key field, the system will replace the ids you import with new system-generated ids.

Make the appropriate selections, then click **Next** to move to the next step in the procedure.

27.3.3.6. Importing Data - Step 3

The third stage of the Import Properties dialog opens as shown. This dialog is common for all import formats.

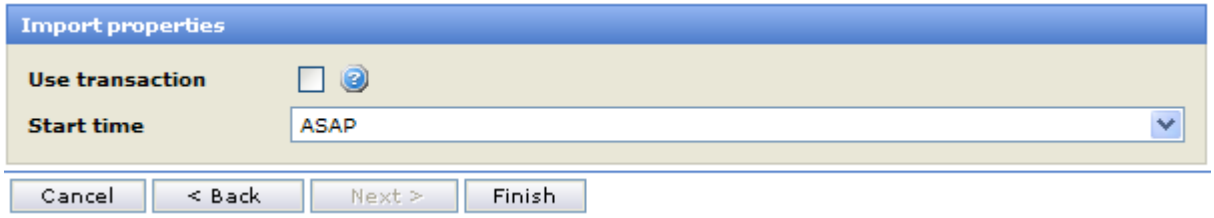


Figure 890 The third stage of the Import Properties dialog

The options available are as follows:

- **Use Transaction** - if this option is selected, all changes made to the target survey will be rolled back if an error occurs.
- **Start Time** - the time when the export task is to commence. You can select ASAP (as soon as possible) or schedule it for a later time. If you schedule the task for later, then when you click **Finish**, a Recurrence setup page opens (see The Task Properties Recurrence Tab on page 60 for more information).

1. Make the appropriate selections and click **Finish**.

   The Rule Executer page opens, and the task will run when appropriate. Here you can see the status of the task, and select to be notified on completion if desired. You can proceed with other tasks as soon as you have clicked Finish.

   If the imported file contains errors, you will receive an email containing two files; one file contains the invalid records, and the other contains an explanation of why the records are invalid.

27.3.4. The Ascribe™ Functionality

Ascribe™ is an external application for recoding open text (verbatim) responses into multis. The application is provided by the third-party company Language Logic (http://www.languagelogic.info), and is not part of Confirmit or part of any product or service provided by Confirmit.

Important
The availability and correct operation of the Ascribe™ functionality depends on Language Logic continuing to support their product. Confirmit has no control over Language Logic, and as such cannot guarantee that the Ascribe™ functionality will always be available.

Ascribe™ can be used for recoding open text questions, and questions with text boxes such as multis and grids with "other" fields.

Data exchange can be conducted either manually (email) or via FTP.

To use the FTP option, your company's Confirmit account must be set up with the correct FTP settings for the Ascribe™ FTP site. You must establish an Ascribe™ account by contacting Language Logic directly, and you will receive from them the relevant FTP account name. If you are a SaaS client you can request the FTP option to be set up for your company by sending the FTP account name to Confirmit at support@confirmit.com. Users operating on their own Confirmit servers should contact their administrator. Assistance from Confirmit in connection with setting up the Ascribe™ FTP settings, modifying them, and other support related to the Ascribe™ FTP solution is offered by Confirmit as Additional Services.

The general procedure after you have established contact with language Logic is:

1. You generate the files to be exported using Confirmit's Ascribe™ Export functionality (see How to Conduct an Ascribe™ Schema Export on page 823 for more information).
2. You send those files to Language Logic.
3. Language Logic recodes the questions and response data.
4. They compile the files, and return them to you.
5. You import the files using Confirmit's Ascribe™ Import functionality (see How to Conduct an Ascribe™ Schema Import on page 826 for more information).

27.3.4.1. How to Conduct an Ascribe™ Schema Export

The Ascribe™ schema export will result in a CXML file with questionnaire and codebook definitions, and response data. To perform an Ascribe™ export:

1. Go to the **Survey Data > Coding > Ascribe™ Export** menu command.

   The Ascribe™ Export Properties overlay opens.

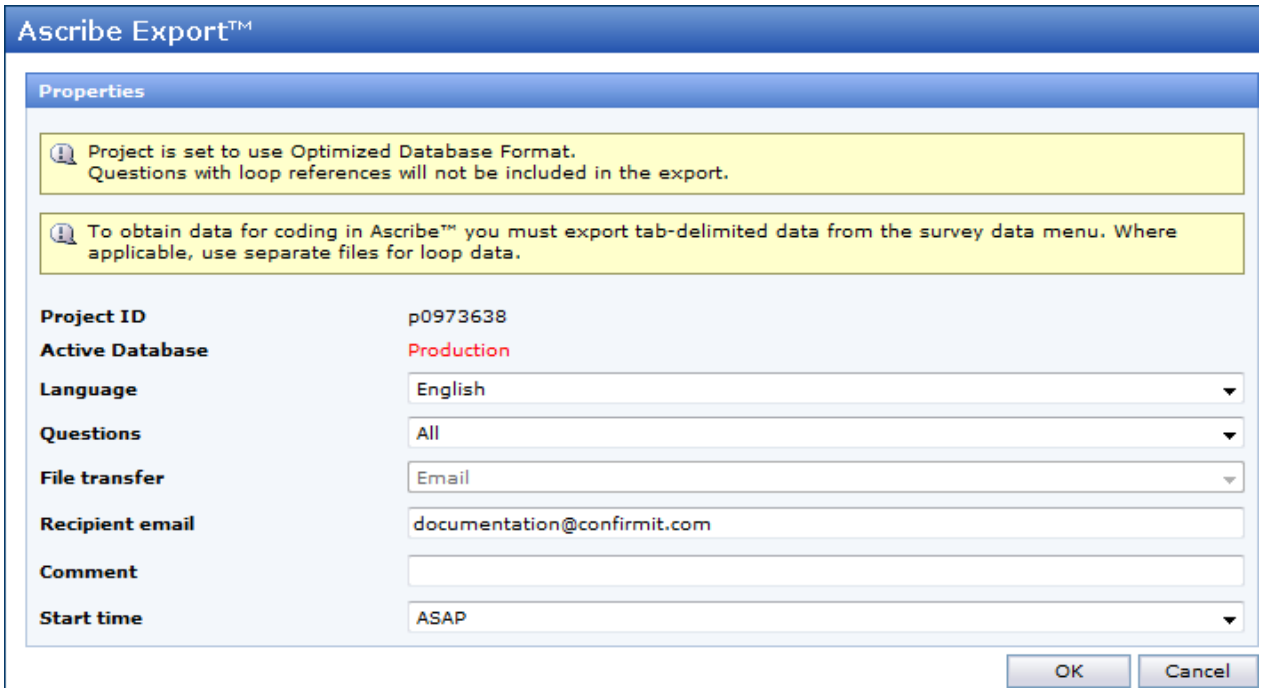


Figure 891 The Ascribe™ Export Properties page

The export will be performed on the active database. Switch between test and production using the global switch in the lower-right corner of the Confirmit window. The properties in the page are as follows:

- **Survey ID** - the identification number for the current survey.
- **Active Database** - the currently selected database (Production or Test).

- **Language** - the questionnaire texts and code books in the XML file will be included in the language you select.
- **Questions**- select one of the options to specify which questions with code books are to be included in the export. The options are:

    o **All** - the entire questionnaire.

    o **Only opentext** - includes open text questions, other specify options in answer lists and multis with the open-text property.

    o **Only coded opentext** - includes only questions that have been set up to be coded, i.e. open text questions that are referred in the "Coding of" property of a multi question that is set up as an "Open text coding". See the figure below.

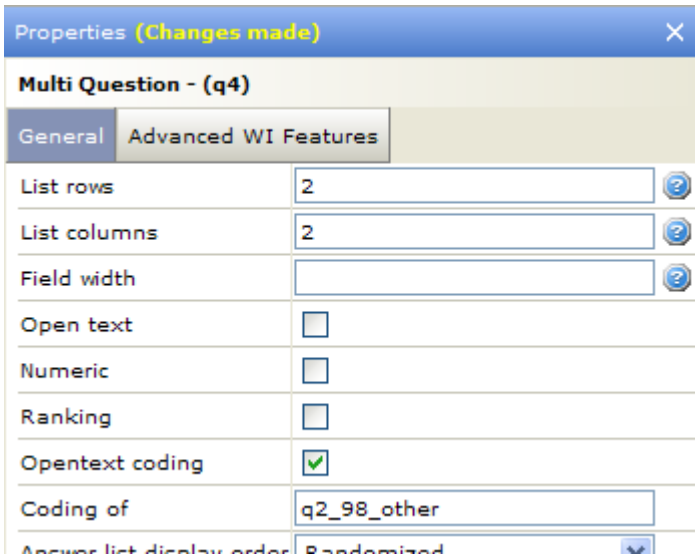


Figure 892 The Opentext coding properties

    o **Variable selection (Triple-S template) -** - when this option is selected, a further field appears where you select the template to be used. The template allows you to select a list of variables that are to be included in the Ascribe schema export. For example, if you have 200 variables in the survey and you want to export only 20 of them, this allows you to select just those.

  Open text questions that are referred as "Coding of" in a multi, as in the figure above, will have the answer list of the multi provided as the codebook for the open text. Otherwise, the codebook for the open texts will be empty. When exporting the entire questionnaire ("all"), the codebook of closed questions (singles, grids, multis) will be their answer list.

Note: If the survey is set to use the Optimized database format, questions with loop references will not be included in the export.

- **File transfer -** select the transfer method to be used. If your company has licensed the FTP add-on (see Data Transfer Encryption and FTP on page 6 for more information), then the options available to you will be Email or FTP. If the FTP add-on is not licensed, then only Email will be available.

    o **Email** - if Email is selected, the Recipient Email field appears where you specify the address to which the email is to be sent.

    o **File name -** if FTP is selected, then the File Name field appears. Here you specify the file name of the file to be transferred to the FTP site.

- **Comment -** type in a free-text comment as required.
- **Start time** - the export will run as a batch task. As with all other Confirmit batch tasks, you can choose between instantly sending it to the batch queue (ASAP), or to schedule it for later execution.

2. Make the appropriate settings and click **OK**.

The Ascribe™ Export task is run. On completion, if Email transmission is selected, an email with the zipped export file attached is sent to the specified address. If FTP is set up and selected, then the zipped file is placed on that FTP site.

27.3.4.2. How to Conduct an Ascribe™ Data Export

If you have the Ascribe™ FTP capabilities enabled for your company, you can perform a survey data export directly to the Ascribe™ FTP server. This will allow you to transfer data directly to the Ascribe™ system for coding. You can also schedule this as a recurring survey task.

The Ascribe™ FTP option will only be available if the export options selected adhere to the data type required by Ascribe™, these are:

- A tab-delimited text file is selected.
- Not a single file export.

The filename of the file generated will be: <pID>.ctxt, and this file will be zipped.

To perform an export directly to Ascribe™:

1. While you are in the appropriate survey, go to the **Survey Data > Exports** menu command.

   The Export dialog opens.

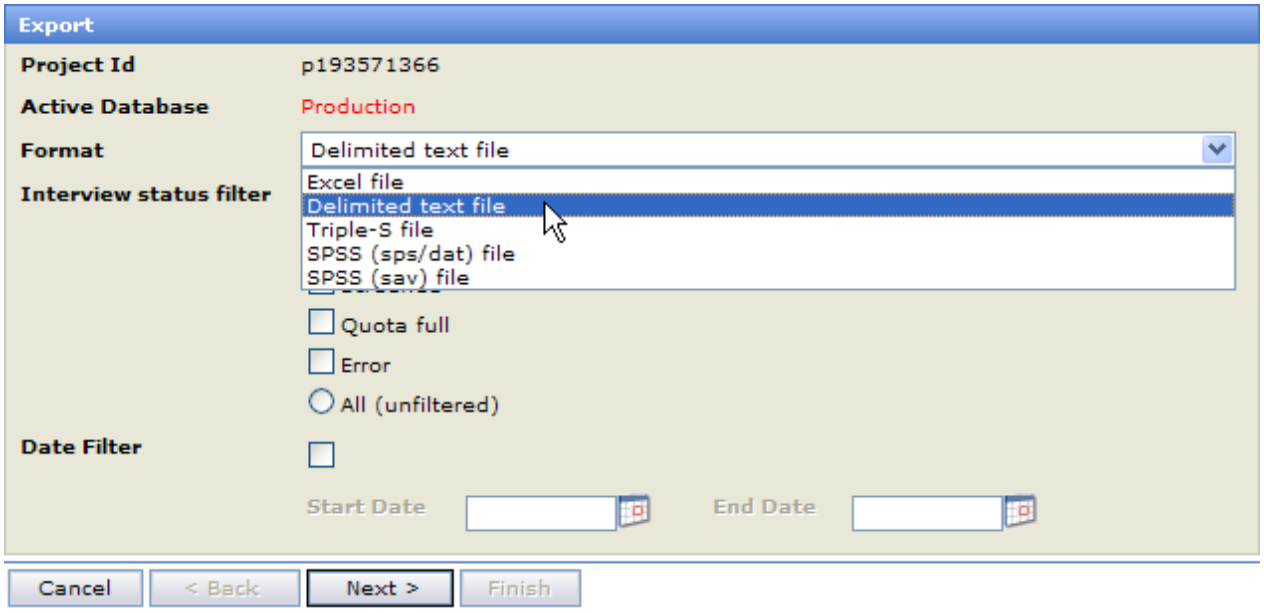


Figure 893 The Export dialog

2. Select the Format to be **Delimited text file**, then click **Next**.

   The Export Properties dialog opens.

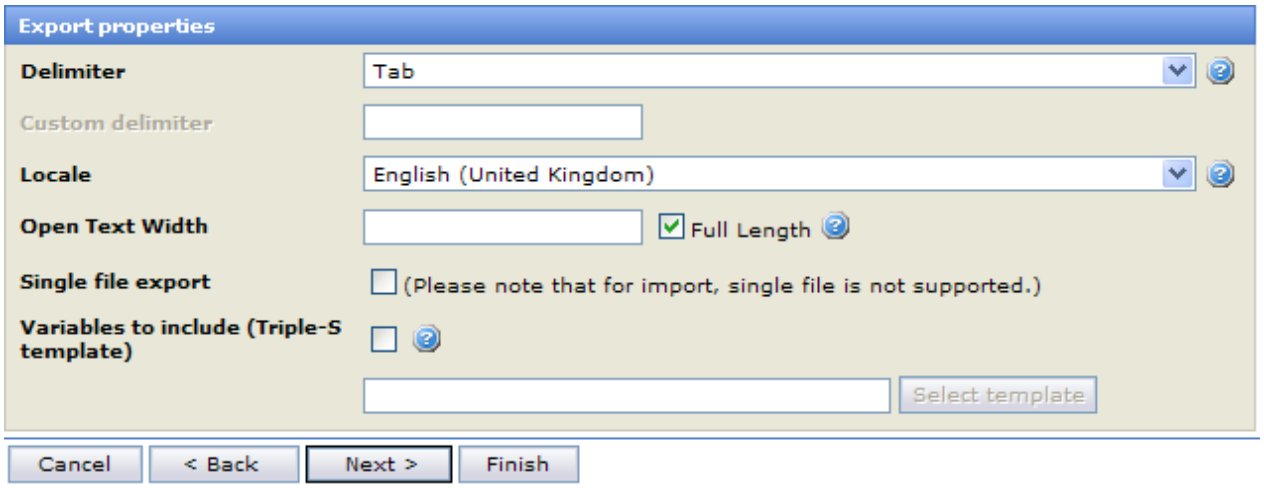


Figure 894 The Export Properties dialog

3. Ensure the Delimiter type is set to **Tab**, check the **Full Length** box, then click **Next**.

   The dialog changes to that shown below.

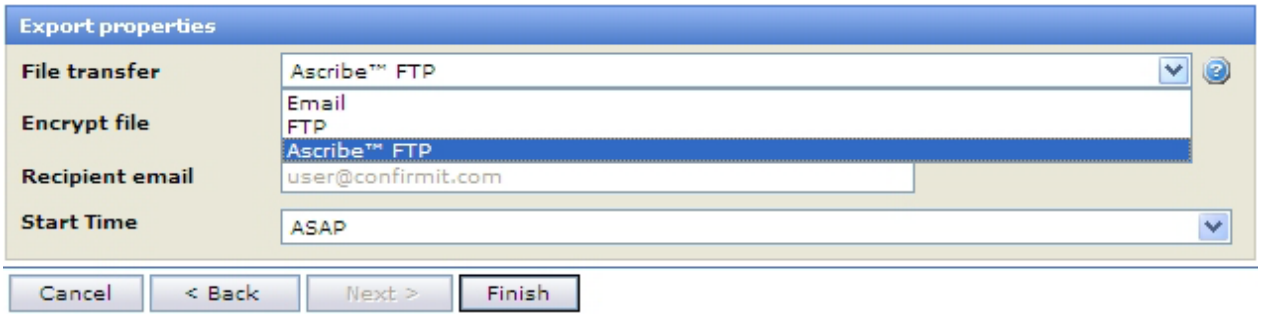


Figure 895 Setting File Transfer

4. For the File transfer property select **Ascribe™ FTP**, set the Start Time as required, then click **Finish**.

   The data will be exported as specified.

27.3.4.3. How to Conduct an Ascribe™ Schema Import

When the open text responses have been exported to Ascribe™ (see How to Conduct an Ascribe™ Schema Export on page 823 for more information) and recoded, Ascribe™ will generate Confirmit CXML with the new variables which can then be imported into the Confirmit survey.

The Ascribe™ Import functionality provides you with the ability to import back into Confirmit these new variables. The procedure is manual to the extent that the zip files must be obtained (either via email or FTP) and archived in an accessible folder, then selected by the user.

Confirmit assumes that the codebook of these newly created questions will be owned by Ascribe™.

The new variables will be based on the old variables. For example, if the exported question has the question id **q1**, then the returned variable will have the question id **q1__coded**.

To import Ascribe™ files:

1. Go to the **Survey Data > Coding > Ascribe™ Codeframe Import** menu command.

   The import dialog overlay opens.

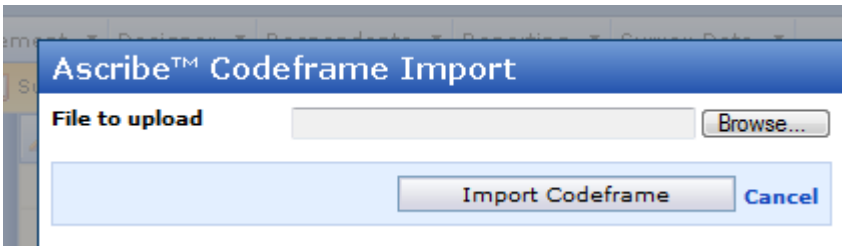


Figure 896 The Ascribe™ Import dialog

2. Click **Browse** to open a standard Windows file browser, then browse to and select the file you wish to import.
3. Click **Import Codeframe**.

   The file is imported. Each new variable is added to the questionnaire tree immediately after its corresponding "original" variable.

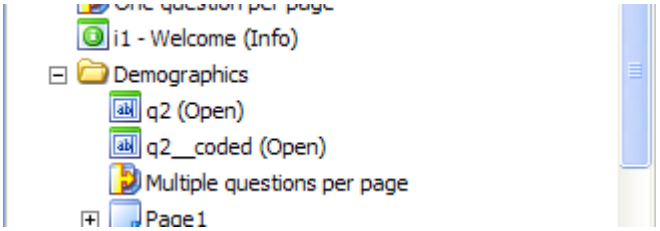


Figure 897 Example of an Ascribe™ variable added to the questionnaire tree

27.3.5. Executing Rules as Other User

In the event you have the necessary permissions, you can execute several of the import, export and processing rules as "Other user". This enables you to select another user from the selected survey's company, and execute the rule with that selected user's settings, for example pgp encryption, file transfer type, email, etc.

A user has the option available only if he/she has the permissions: **system_account_read** and **system_project_data_export_admin**. Refer to the Confirmit Administrator Guide for further details. The Execute as Other User field is then available towards the bottom of the import/export/rule dialog.

The illustration below shows the Export Properties dialog step 3 for survey data export.

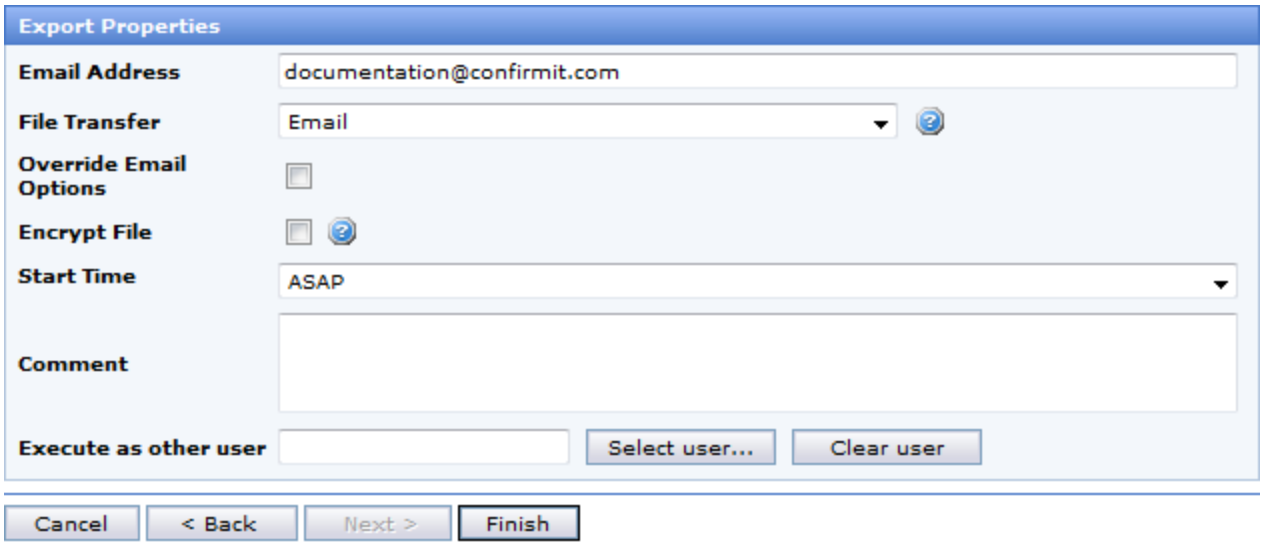


Figure 898 The Survey Data Export Properties dialog showing the Execute as other user option

Once the survey is selected, the **Select User** button is available. Click this button to open a Select User overlay in which you can search for and select the user you wish to use. Click **OK** to add the selected user's user name to the field, then continue with the procedure.

The Execute as other user feature is available for the following rules:

- Survey Data Export
- Survey Data Import
- Survey Respondents Export
- Survey Respondents Upload
- Data Processing rules:
    - from SurveyData to File
    - from File to SurveyData

Note that the survey must be selected before you can select the "other user".

27.4. Cleaning of Personal Data

To assist you with data security and GDPR compliance, you can remove personal data (PII), for example names and email addresses, from surveys. This will allow you to anonymize the data once the personal details are no longer needed, for example when data collection is finished on a project and there is no further requirement for emailing invitations and reminders.

You can also perform partial cleaning of records that are older than a given number of days. This can be useful for a continuous survey (tracker) as it allows you to clean the personal data from old data records (for example older than 60 days), and leave the personal data on more recent records. By specifying the "Only records older than X days" limit on the task, the system will overwrite personal data in the respondent table that has a created_date more than X days in the past, and overwrite personal data in the response data that has an interview_start date more than X days in the past.

You can set the task to be recurring so that for example every week it will remove personal data that is older than 60 days from a particular project.

Note: If the survey is linked to a panel, the panelistid will also be cleaned from the dataset. It will then no longer be possible to join with personal data in the panel database. Similarly, if the survey is linked to a contact database the contactid will be cleaned, as will the respid in the survey activity loop table in the contact database.

Warning
This action is irreversible!

1. To access the functionality, go to the **Survey Data > Personal Data (PII) Cleaning** menu.

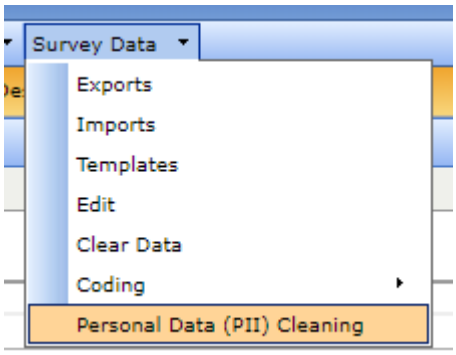


Figure 899 Accessing the Personal Data Cleaning menu

The Personal Data Cleaning dialog opens.

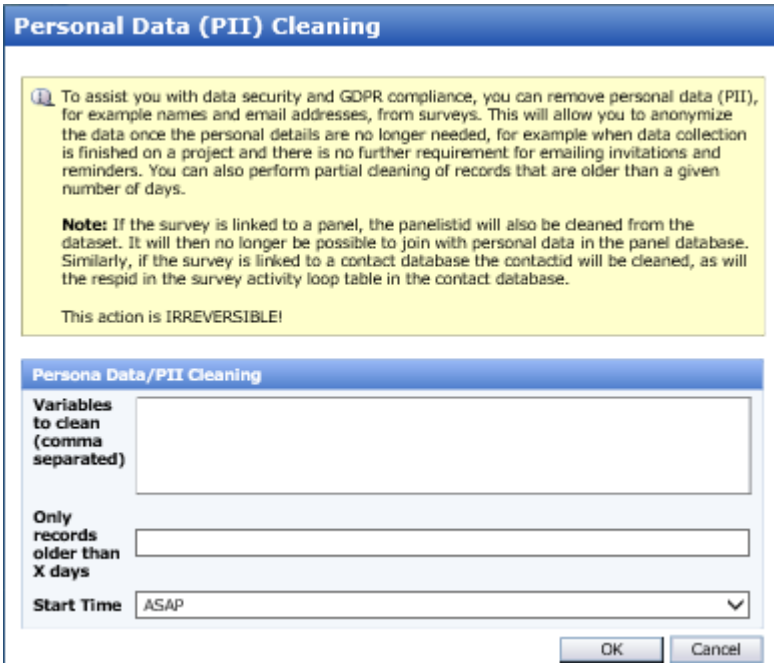


Figure 900 The Personal Data Cleaning dialog

2. In the Variables to clean... field, provide a comma-separated list of the field names that are to be cleaned (overwritten).

   When running the task, these variables (if found) will be cleaned in both respondent data and survey data.

3. If you wish to remove only data that is older than a specified number of days, type the required number into the Only records older... field.

4. If you wish to make the task recurring, click into the Start Time field and select Recurring. Additional fields will then appear; set the task to run as required.

28. Contact Databases

A contact database allows you to gain greater understanding of your customers, employees or other contacts, by creating a central store of their key information and a history of their transactions. This enables you to track their feedback and responses over time. The hub uses a single repository for all the data, such as name, email, address, gender, age etc. known as a “Contact database” (see How to Create a Contact Database on page 830 for more information).

Using a key such as “customerid” or “email”, you can link to all the different data sources with contact data (transactional/relationship/ad-hoc surveys, CRM data, support emails etc.), in a one-to-many relation (one contact, several responses in one or more surveys). Several types of contact databases can be included in a Hub, for example databases for customers, employees, agents, partners etc.

Surveys that are added to a hub can be linked to a Contact Database using a key (for example customerid or email). This linkage can be performed at any stage: before sample is uploaded and data collection has started, and also during data collection or even after the survey has been closed.

This provides the following benefits:

- Users can use data from the contact database in reporting and analytics on any survey that is linked, without first having to bring all the customer data into the survey as background variables.
- There is only one repository to maintain if data must be corrected, new customer data must be added etc.

The key field in a contact database, used to uniquely identify the contacts, is the system field contactid. This will be set up in the contact database automatically by the system.

28.1. How to Create a Contact Database

To create a new contact database:

1. In the **Home** menu or in the Authoring quick-start menu click **Contact Databases**.

   The Contact Database List page opens. This page lists all the contact databases that you have access to.

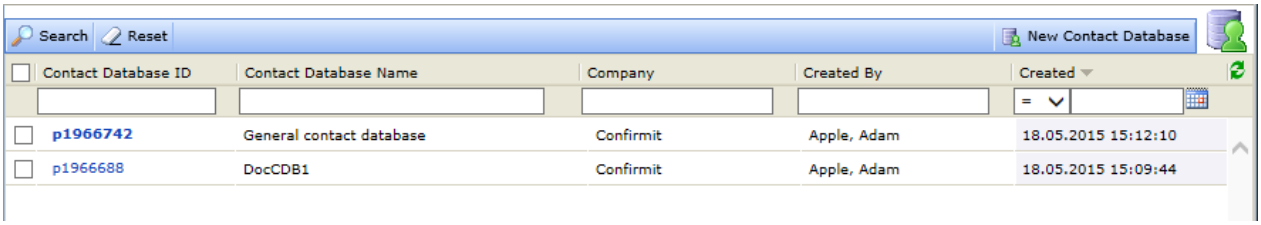


Figure 901 Example of the Contact Database List page

2. Click the **New Contact Database** button in the upper-right corner of the page.

   The New Contact Database overlay opens.

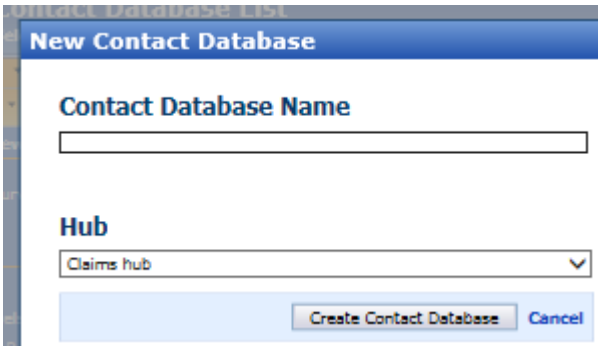


Figure 902 The New Contact Database overlay

3. Type in a name for your new contact database, and select the hub to which it will be connected.

Note: All contact databases must be associated with a hub. If you do not have access to a hub (none are listed in the drop-down), then you must create a hub before you can create the contact database. Refer to the separate Hub User Guide for further information.

4. Click **Create Contact Database**.

   The database is created and opens at the Overview page. Note that at this stage the database has no content.

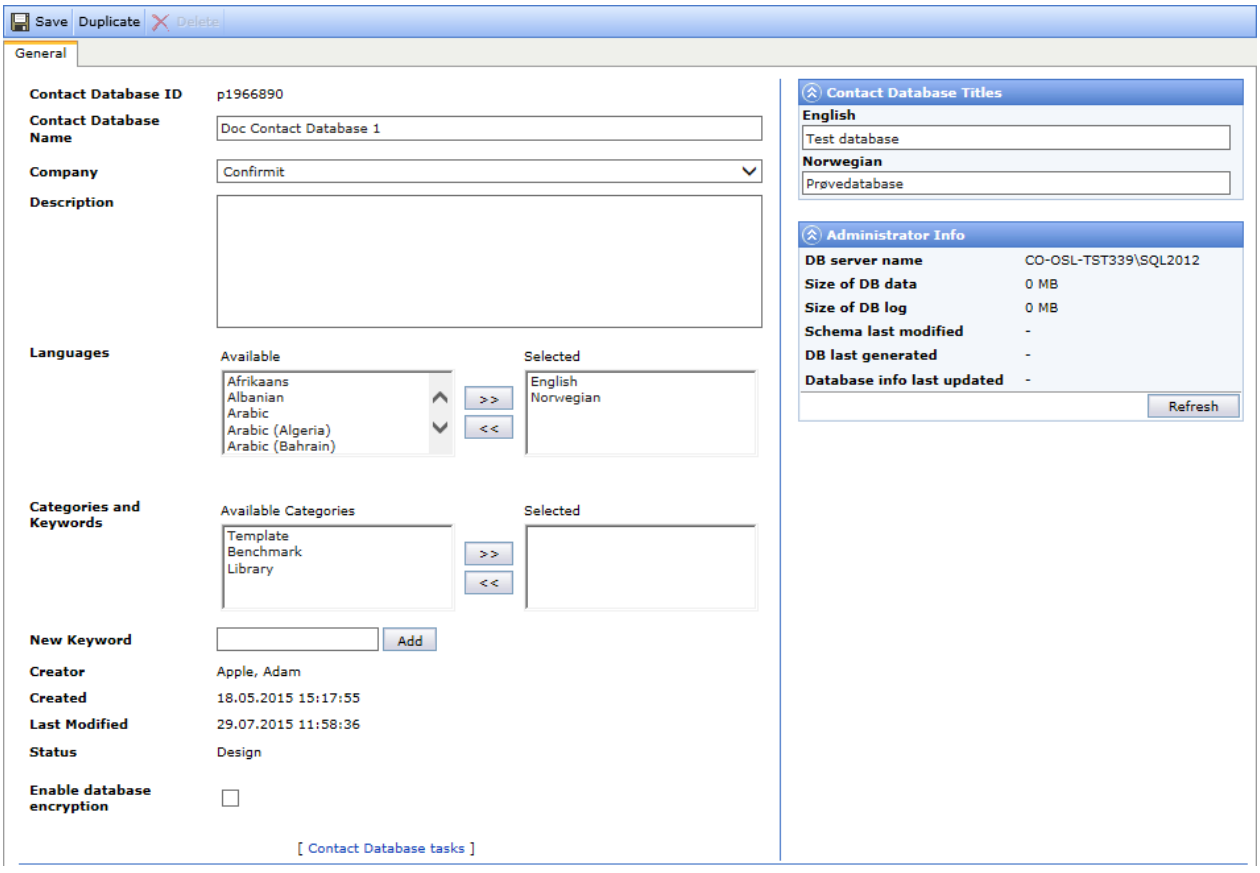


Figure 903 Example of the contact database Overview page

Here you can edit the name of the database, add a description, select and deselect the languages that are to be available, and select and deselect categories and keywords. You can add a title for the database in each language that is selected, and some additional information is provided that may be useful to the administrator (see Overview on page 836 for more information).

You can now go to the Designer page to set up the content of the database (see Designer on page 832 for more information).

28.2. Contact Database Setup Menu

The Contact Database Setup menu provides access to the functionality required for setting up the database. The following sections provide details for the menu options.

28.2.1. Designer

The Designer is where you define the variables you want in your database, for example name, email address, company etc. The layout and functionality is very similar to the Authoring survey questionnaire tree, but note that only the basic types of variables are available, and folders so you can organize the variables. Also, “standard” survey variables have a lot of functionality that is not applicable for a contact database, so unnecessary functionality has been removed from the contact database variables.

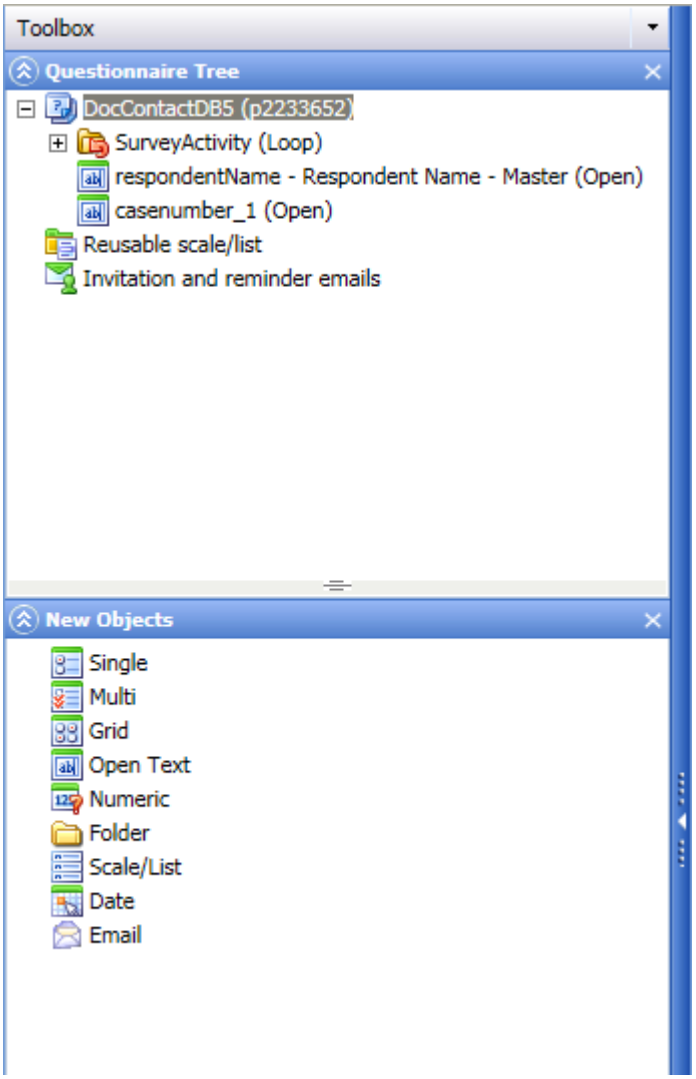


Figure 904 The Contact Database Designer page

Define and set up the required variables in the same way as for a survey (see How to Add New Objects to the Questionnaire Tree on page 217 for more information).

Most of the properties available for the variables in the contact database are the same as for survey variables (see Question Properties on page 251 for more information). However there is one property that is specific to variables in a contact database: Keep history.

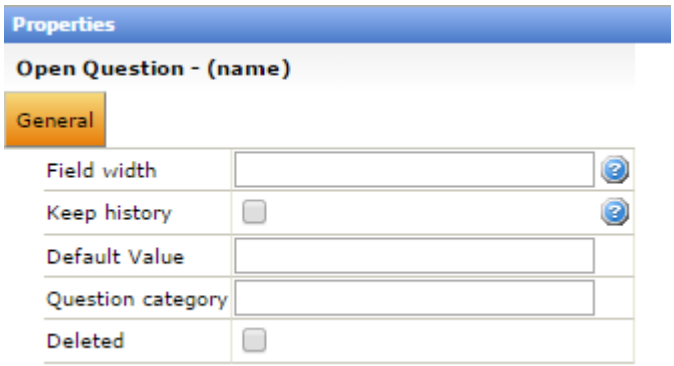


Figure 905 The Keep History property

Keep history can be used to keep track of historic data for variables that may change over time, like for example region, income, marital status etc. If “Keep history” is set for a variable, the contact database will create a new “version” of a contact whenever there is a change in a contact’s value for that variable. The version will be given a timestamp that specifies for which period the value was valid.

The variables in the **SurveyActivity > Core Fields** folder are system-generated. These will contain data on the surveys that the various contacts in the database have been invited to respond to, and are used for reporting and contact frequency rules. You can edit some of the details in these variables, such as labels, but you cannot delete them or otherwise change them. These variables are as follows:

- **SurveyId -** The survey's project number.
- **SurveyRespid -** The respid of the contact's record in the survey database.
- **ResponseStatusValue -** The respondent's value for "status" in the survey.
- **ResponseStatusCode -** The respondent's status in the survey, coded into a single question with the following answer categories:
    - NotStarted - 0
    - Started - 1
    - Completed - 2
    - Screened - 3
    - QuotaFull - 4
    - Error - 5
    - Other - 99
- **UploadedDate -** Timestamp for when the respondent was created ("CreatedDate" in the survey database).
- **InvitationDate -** Timestamp for the last invitation was sent.
- **StartedDate -** Timestamp for start of survey ("interview_start" in the survey database).
- **CompletedDate -** Timestamp for end of survey ("interview_end" in the survey database).
- **OptOutCode -** Emailing blocked by Flex email opt out extension:

  - None - 0
  - Company level blacklist - 1
  - Panel level blacklist - 2
  - Project level blacklist - 3
  - Company level opt out - 4
  - Panel level opt out - 5
  - Project level opt out - 6
  - Blacklisted domain on company level - 7
  - Blacklisted domain on panel level - 8
  - Blacklisted domain on project level - 9
- **OptOutDate -** Time blocked by Flex email opt out extension.
- **SmtpStatusText -** Email delivery status text.
- **SmtpStatusCode -** Email delivery status code.
- **SmtpStatusDate -** Time of update of email delivery status.
- **FrequencyRuleStatusCode -** Status from Contact Frequency Rules (CFR) applied on the project.
  - Passed CFR filtering - 0
  - Blocked by CFR filtering - 1
- **FrequencyRuleStatusDate -** Time CFR was applied and status set.
- **FrequencyRuleSurveyId -** Project id of the survey for which there was a previous survey invitation for the contact within the Contact Frequency Rule limit, which cause emailing to be blocked.

28.2.2. Database Generation

Once the database is set up as required, and also after any changes are made, the database must be generated (this is effectively the same as launching a survey). To do this:

1. Go to the **Contact Database Setup > Database Generation** menu command.

   The Database Generation page opens.



Figure 906 The Database Generation page

2. Select whether you wish to update the existing database or create a new one.

WARNING:
Recreating the database will delete all data in the database. NEVER do this with a running production database.

3. Select Enable Database Encryption to encrypt the database when it is generated. Note that it is not possible to change the encryption state of a generated database; once a database is generated, if you wish to change the encryption state you must create a new database - see the warning above.
4. Click **Generate Database**.

The generation task runs and the database is compiled.

28.2.3. Database Definition Export

Databases can be exported and imported through XML, allowing you to transfer database definitions from one Confirmit server to another.

To export a database:

1. Activate the database (select it from the database list).
2. In the **Contact Database Setup** menu, click **Contact Database Definition Export**.

   The Contact Database Definition Export overlay opens as shown below.

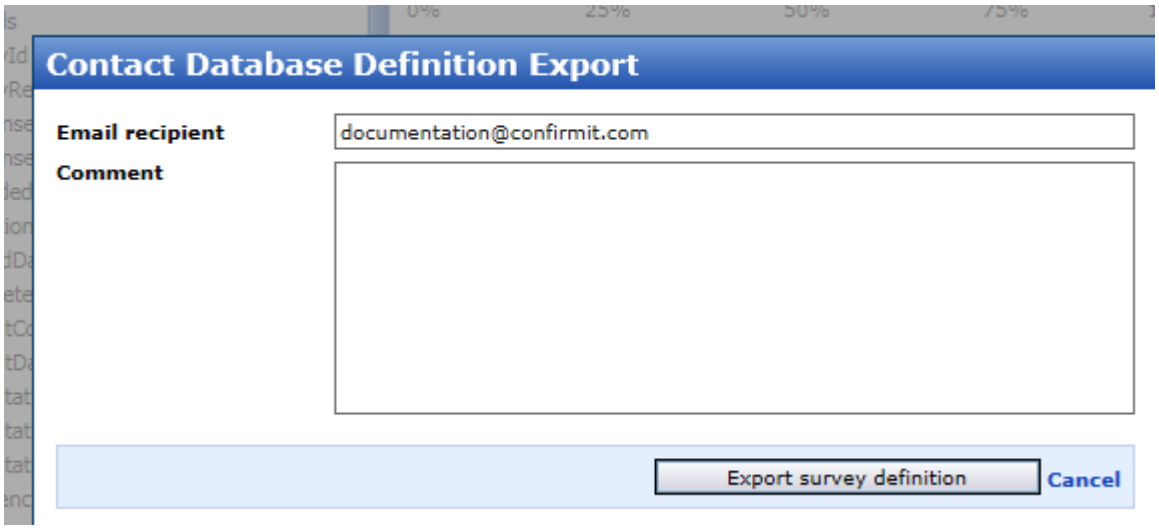


Figure 907 The Contact Database Definition Export overlay

3. Set the recipient's email address as required (default is the current user - you) and add a comment as necessary, then click **Export Survey Definition**.

The Database Definition will be sent to the address specified in the format of a zipped XML file (.zip) attached to an email.

28.2.4. Designer Log

Confirmit records all actions executed on a database, and the Designer Log provides you with an overview of all the changes that have been made to the database. The system records the date and time when a change was made, the user who made the change, and provides a brief description of the change .

You can undo any changes that have been made - click the **Undo** link towards the right side of the window for the relevant change. A confirmation message appears; click **OK** to confirm the operation.

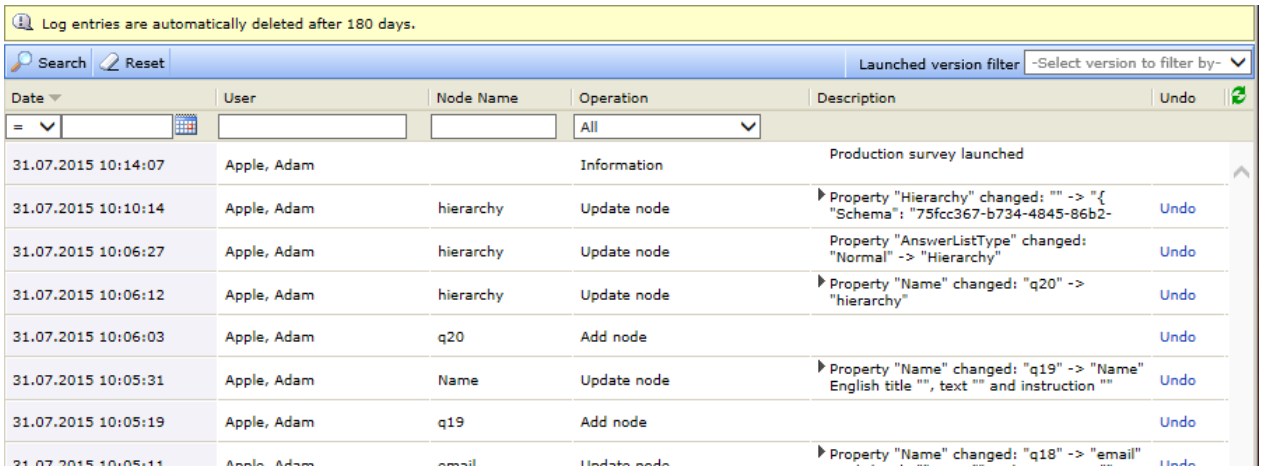


Figure 908 Example of a Designer log

Note that log entries are deleted automatically after 180 days.

28.2.5. Active Languages

In a multilingual database you can have as many languages as you wish. However due to the space available on the editing pages, a maximum of five language fields can be available for editing at any one time. The Active Languages page is where you specify which languages are to be visible while you are working; check or uncheck the language boxes as appropriate. Note that the Active Languages page is common for all nodes in the database; the languages selected in this page will be available for all the nodes.

The languages selected here will be remembered by Confirmit such that when you move out of the database, upon return, the active languages selected in the previous session will be re-selected.

Note: You select which languages are to be available in your database on the Overview page (see Overview on page 836 for more information).

28.3. Contact Database Overview Menu

The Contact Database Overview menu provides access to the Database Overview page, and allows you to set up and edit the access permissions. The following sections describe the menu options.

28.3.1. Overview

The Overview page for a contact database provides you with information about the database. This is the first page that opens when you create a new database (see How to Create a Contact Database on page 830 for more information). To open the Overview page for a database, go to the **Contact Databases** item in the quick access menu and on the Contact Database List page click on a blue ID link, or when a database is open, go to the **Contact Database Overview** menu command. The Overview page opens.

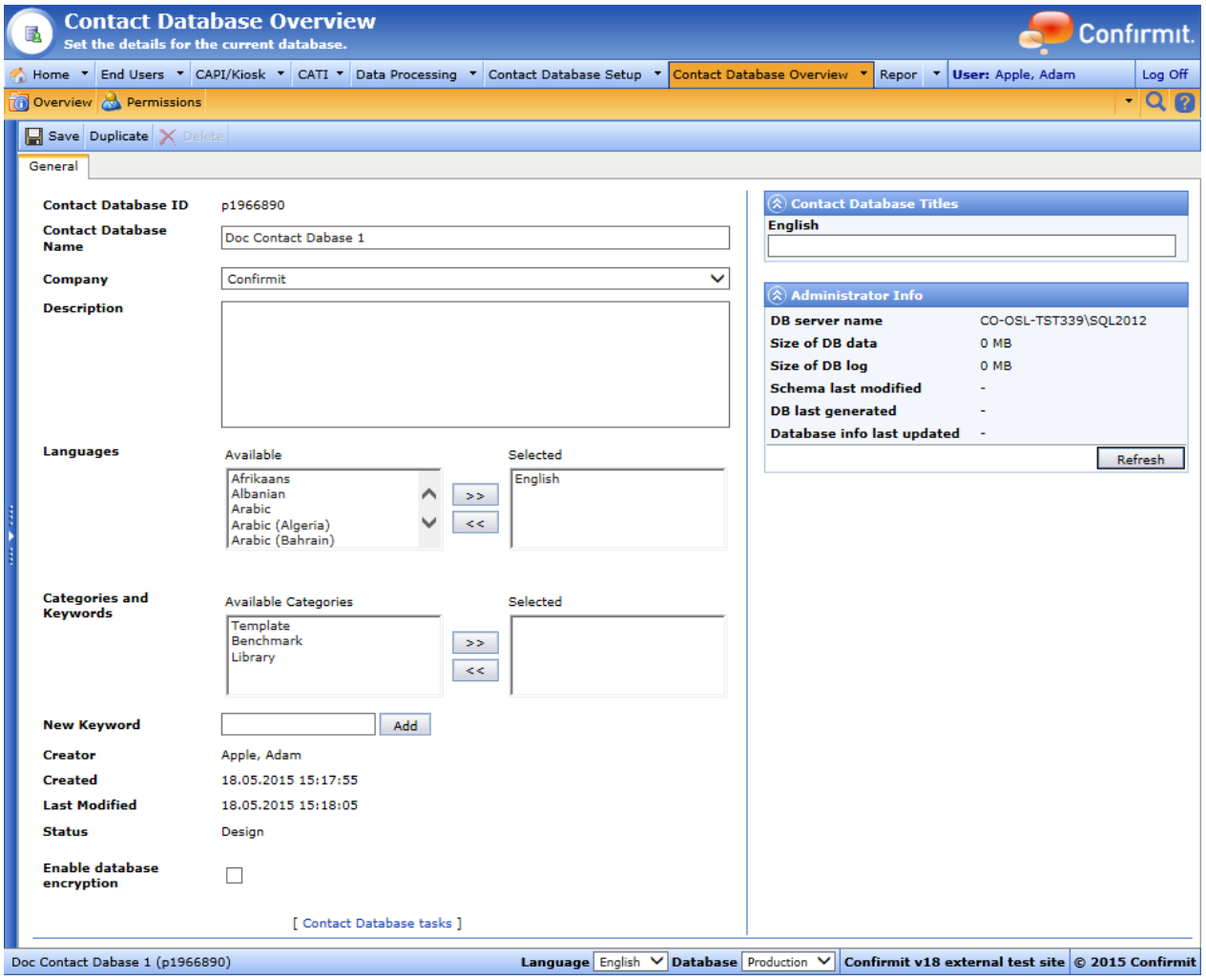


Figure 909 Example of the Overview page for a contact database

The fields and other information on the General tab are as follows:

- **Contact Database ID –** system-generated unique identification number. This is created when the database is created, and cannot be changed.
- **Contact Database Name –** a title you choose for the database.
- **Company –** your company's name.
- **Description –** here you can enter a more detailed description of the database, so it is more easily identifiable when you (or someone else) returns to it at a later date.
- **Languages –** here you select the working language(s) that are to be used in your database. The *Available* field contains all the languages that are supported in Confirmit; the *Selected* field contains the languages available to your database. Highlight a language in the *Available* field and click the **>>** button to add it to the *Selected* field. Once a language has been selected, you can edit the messages for that language to suit the particular database (see How to Edit a Survey Message on page 191 for more information). Note that due to space restrictions on the editing pages you can work with up to five languages at one time. Select the languages that are to be editable in the Active Languages page (see Active Languages on page 836 for more information).

- **Categories and Keywords –** you can categorize the database. There are three predefined categories: Template, Library, and Benchmark for Reportal benchmark functionality (see the Reportal User Manual for further details).
- **New Keyword -** In addition to the predefined categories, you can add your own free text categories, for example "Demos", "E-SAT", "Brand recognition", etc. You can then use these categories when searching for databases in all parts of the application (including Reportal).
- **Creator** - the name of the user who created the database.
- **Created** - the date the database was created.
- **Last Modified** - the date the database was last edited.
- **Status –** the database status. This can be Design (before the database is generated),
- **Enable Database Encryption -** select this option to encrypt the database when it is generated. Note that it is not possible to change the encryption state of a generated database; once a database is generated, if you wish to change the encryption state you must create a new database.

Note: Database encryption is a company add-on and is subject to payment. If your company does not have the add-on, then the option will not be available in the Launch Survey page.

- **Contact Database Titles -** this currently has no function.
- **Administrator Info -** information that may be useful to the administrator.

28.3.2. Permissions

For all contact databases, the user who creates the database is the database administrator and owner, and a database is initially invisible to all other Confirmit users. All Confirmit users in your organization will be listed in the Permissions page, and the database administrator can give other users permission to view the new database.

The details and functionality for the database permissions page are identical to those of the survey permissions page (see Permissions on page 185 for more information).

28.4. Contact Database Management Menu

The Contact Database Management menu provides access to the functionality for exporting and importing data from and to the database, and for setting up and editing database templates. The following sections provide details for the menu options.

28.4.1. Exports

You can export the data contained in a contact database as an Excel file or a tab-delimited .txt file. Before exporting you can filter the data so you only export the data you are interested in. To do this:

1. When in the contact database, go to the **Contact Database Management > Exports** menu.

   The Export Contact Database Data page opens.

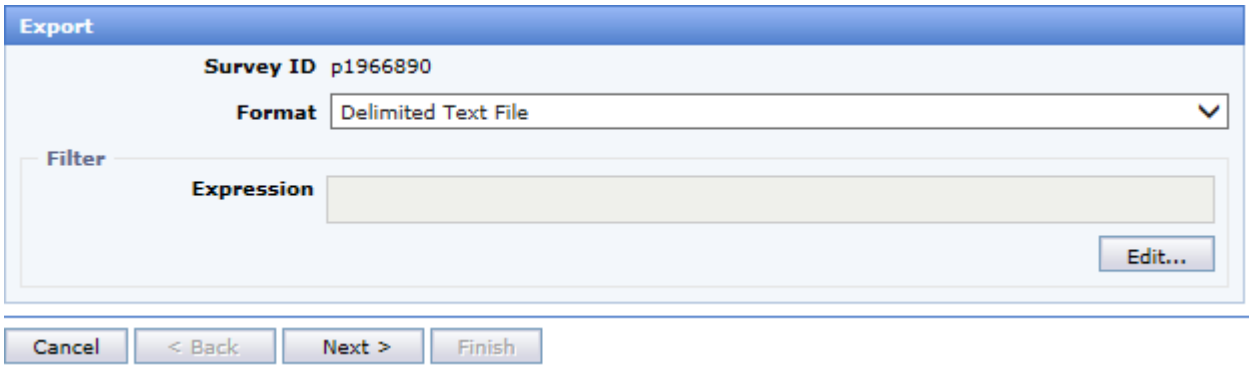


Figure 910 The Export Contact Database Data page

- **Survey ID** - the identification number of the database you are currently working on.

2. Select the format you wish to export to.
3. If you wish to filter the data before exporting it, click **Edit** to open the expression editor window and create the required filter expression.
4. Click **Next**.

   The page that opens now depends on the format you have selected.

28.4.1.1. Exporting as Delimited .Txt File

When Tab Separated is selected, the Export Contact Database Data page changes to that shown below.

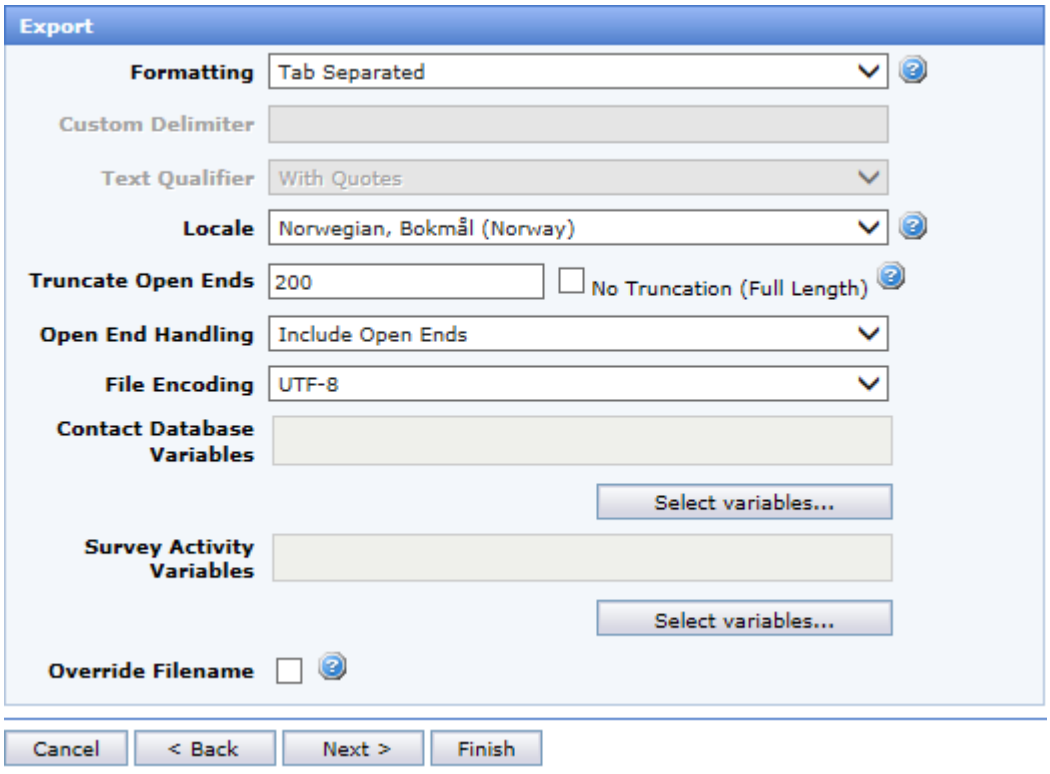


Figure 911 The second stage of the Export dialog for a Delimited Text File export

Make the appropriate selections, then click **Next**. The options are as follows:

- **Formatting** - a delimiter is a sequence of one or more characters used to specify the boundary between separate, independent regions in plain text or other data stream. An example of a delimiter is the comma character in a sequence of comma-separated values. Select the delimiter that you wish to be used in the data file to be exported. The options are:
    - **Comma** - a Comma (,) -separated ASCII text file is generated. All answers will be inside quotes (""). The variable names will be in the first row.
    - **Tab** - a Tab-separated ASCII text file is generated. No quotes ("") are used. The variable names will be in the first row.
    - **Custom** - the Custom Delimiter field is activated. Here you can select any single keyboard character, which will then be used as the delimiter in the exported ASCII text file.
- **Text qualifier -** this property is available when you select “Formatting: Comma separated” or "With Quotes". When "Comma separated" is selected, the comma character has a special meaning; it is used to separate the different values from the different variables. However during export commas will be removed from opentext answers since in this case the character has a different meaning. Adding quotes around an answer text ensures that the text remains unchanged. A Delimited Text File export with Quotes can be generated.
- **Locale** - determines the formatting of elements such as numbers (decimal point) and dates/times. Select the locale appropriate to the format used in the file.
- **Truncate Open Ends -** For Open Ends (Open Text questions with no field width specified), it is recommended to truncate texts to improve performance. If a number of characters is specified for the Open Ends Width, texts longer than this limit, if any, will automatically be truncated. If No Truncation (Full Length) is selected, the whole text will be imported/exported, but the task may take significantly longer to execute.

Note: There is no filter for Open End type, so all Open Text questions with no field width specified will be included in the export (those with type Normal, Hidden or Background), while those with field width set will not be included.

- **Open End Handling -** defines how open ended questions are handled. The options are:
    - **Include Open Ends -** all open end questions are included in the export.
    - **Exclude Open Ends -** no open end questions are included in the export.
    - **Open Ends Only (one row per respondent) -** only open end questions are included in the export file, with one row in the file for each respondent (all the answers for each respondent are in the same row).
- **File Encoding -** to support the export of surveys using Unicode (for example Chinese), you can choose the Character Encoding of the Export files. Choose between ANSI, Unicode and UTF-8 (default).
- **Contact Database Variables -** click **Select Variables** to open a selection overlay, then select the variables you wish to use. Note that you must select one or more variables or the export will return nothing.
- **Survey Activity Variables -** click **Select Variables** to open a selection overlay, then select the variables you wish to use.
- **Override Filename -** All export tasks will generate files with unique names in the following format: <projectid>_<userid>_<taskid>.<extension>. The "Override file name" functionality allows you to override this system-generated name. Tick this checkbox to open the file name text box were you can edit the system-generated name (see APPENDIX F: EXPORT FILENAME DYNAMIC VALUES on page 866 for more information).

28.4.1.2. Exporting as Excel

When Excel File is selected, the Export Contact Database Data page changes to that shown below.

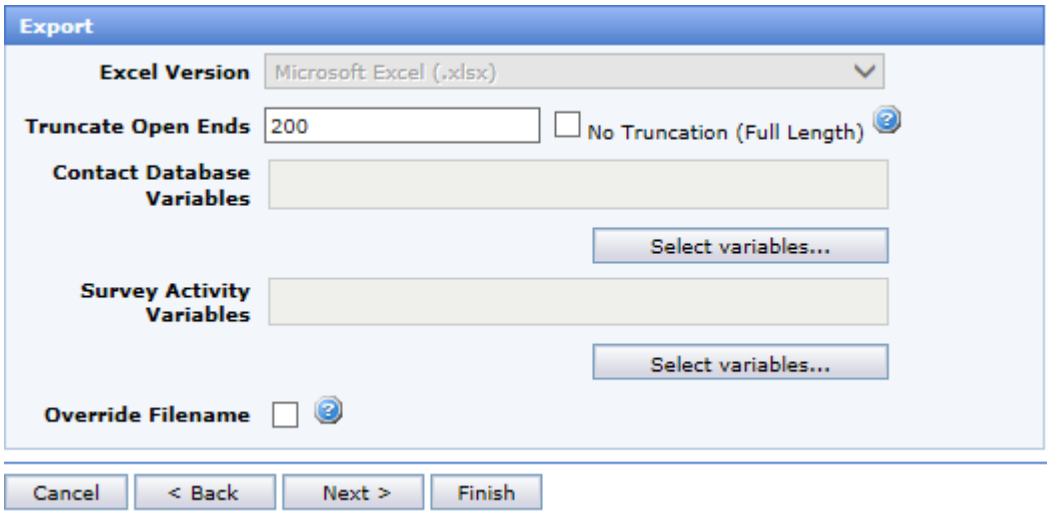


Figure 912 The second stage of the Export dialog for an Excel export

Make the appropriate selections, then click **Next**. The information displayed, and the options available, are as follows:

- **Excel Version** - the file will be exported to MS Excel® in the Office version selected. The variables may be split over several worksheets. Microsoft Excel 97-2003 and Microsoft Excel 2007 are supported. The variable names will be in the first row.
- **Truncate Open Ends -** for Open Ends (Open Text questions with no field width specified), it is recommended to truncate texts to improve performance. If a number of characters is specified for the Open Ends Width, texts longer than this limit, if any, will automatically be truncated. If No Truncation (Full Length) is selected, the whole text will be imported/exported, but the task will take significantly longer to execute.
- **Contact Database Variables -** click **Select Variables** to open a selection overlay, then select the variables you wish to use.
- **Survey Activity Variables -** click **Select Variables** to open a selection overlay, then
- **Override Filename -** allows you to override the system-generated file name. Tick this checkbox to open the file name text box were you can edit the system-generated name (see APPENDIX F: EXPORT FILENAME DYNAMIC VALUES on page 866 for more information). Note that when exporting Survey Data to the FTP server in Survey Data > Exports or Data Processing rules, the Override Filename option accepts relative paths, as for example "..\..\myftpfile_in_another_folder.txt". In this case the file will not be stored in the default folder ("ProjectsData\p123123" or "RulesData\RuleN"), but rather directly under the (Company) Download folder.

28.4.1.3. Export Properties

The third stage of the Export dialog opens. This dialog is common for both export formats.

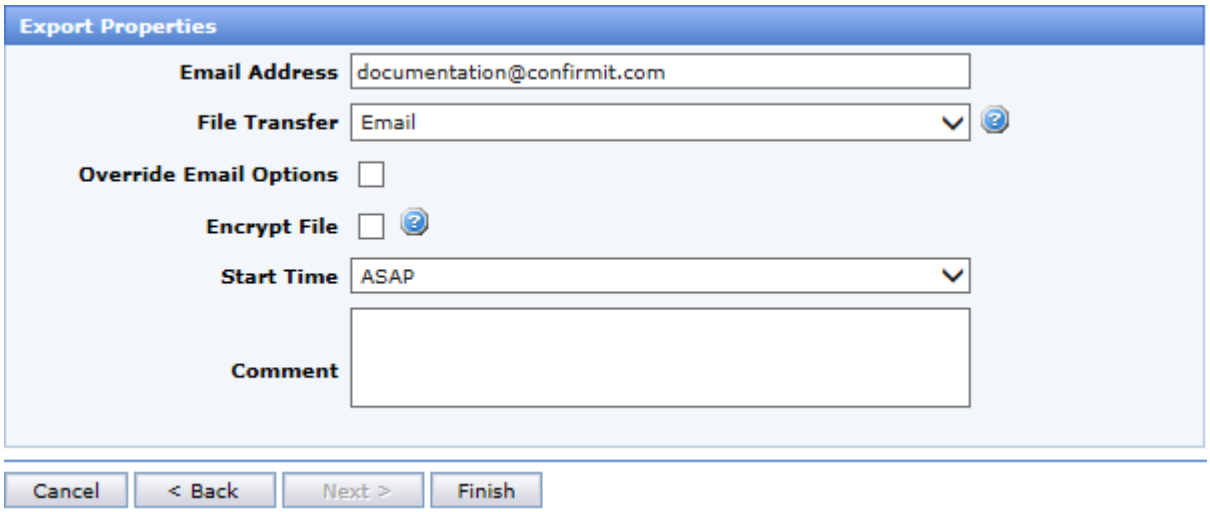


Figure 913 The third stage of the Export dialog

Make the appropriate selections. The information displayed, and the options available, are as follows:

- **Email Address -** you can send the export to any email address - type the appropriate address into the field. The default is your address.
- **File transfer** - export files can either be sent by email or placed on an FTP server. FTP is the recommended option for large volumes of data, since emails with large attachments may be blocked. FTP can allow automation of data flows, since files can then be picked up automatically by another system/process. Note that your company must license the FTP add-on for this option to be available.
- **Override Email Options -** when selected, allows you to override the standard export email options and customize both the subject and the email that will be sent to the export recipient. Checking this box displays a number of additional options.
- **Encrypt file** - data transfer encryption functionality makes it possible to perform secure data exports from Confirmit. The encrypted files can then be either ordered by email or sent to the FTP server for downloading. The users will have to decrypt the files using their private PGP encryption keys.
- **Start Time** - the time when the export task is to commence. You can select ASAP (as soon as possible) or schedule it for a later time. If you schedule the task for later, then when you click **Finish**, a Recurrence setup page opens (see The Task Properties Recurrence Tab on page 60 for more information).
- **Comment -** you can add comments that are included in the export email.

Note: In the event the user has the necessary permissions, they can perform the export as a different user. The Execute as Other User field is then available below the Comment field (see Executing Rules as Other User on page 827 for more information).

When you are ready, click **Finish**.

The Rule Executer page opens, and the task will run when appropriate. Here you can see the status of the task, and select to be notified on completion if desired. You can proceed with other tasks as soon as you have clicked **Finish**.

28.4.2. Imports

You can import data into a contact database in either delimited text file or Excel format.

1. Go to the **Contact Database Management > Imports** menu.

   The Data Import dialog opens.

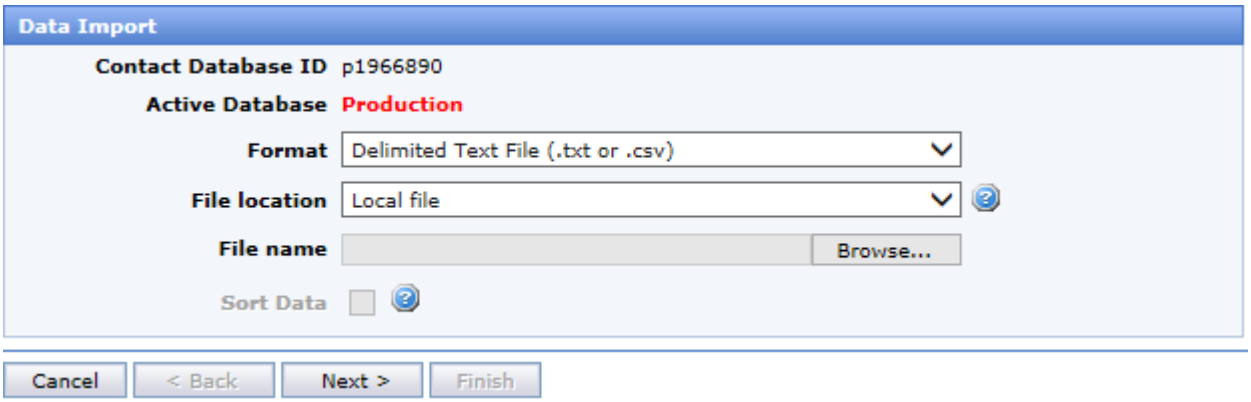


Figure 914 The Data Import dialog

The information displayed, and the options available, are as follows:

- **Contact Database ID** - the identification number of the survey you are currently working on.
- **Active Database** - the currently selected database. To change this, go to the Database selection field in the lower-right corner of the Confirmit window.
- **Format** - the format of the file that is to be imported. Note that the fields in the dialog displayed in the next step of the Import procedure will differ depending on the format you select here.
- **File location** - select the source of the file. Import files can be uploaded directly in the browser, placed on a Confirmit FTP server and retrieved from there, or imported from an external FTP server.

    o If you wish to upload the source file from your server network (perhaps the file has been stored there after having been sent to you via email), then select this option and click **Browse**. A standard browser window opens, in which you can search for and select the file you wish to upload.

    o **FTP** - if your company has licensed the FTP add-on and it has been enabled, this option will be active. You can then fetch the file to be uploaded from Confirmit's FTP location. You only need to type in the file name; Confirmit's FTP address is specified as part of the enabling procedure and cannot be changed. Note that fetching from FTP can allow automation of data flows as files can then be picked up automatically.

Note: Confirmit FTP imports support the use of wildcards in the file name. * gives zero or more characters, ? gives exactly zero or one character. For example, myFile?_*.txt - will match myFile1_20082012.txt and myFile2_22082012.txt.

    o **External FTP -** [only available via the FTP add-on] this option enables files to be taken from an external FTP location. In this case the file name, Folder Name (at the external FTP location), the Host Name, and the FTP User name and Password must be specified. The **Verify connection** button is provided to allow you to check whether the FTP settings are correct.

Note: When importing from External FTP, the user interface does not know the status of the file. A message will therefore be presented stating that the file does not exist. This message can be ignored.

- **File name** - the name of the file you wish to import.
- **File handling** - if you have selected one of the FTP options, select whether you wish to copy the file from the server/FTP site or move it (delete it from the site).
- **Sort Data** - in Excel import, data in all sheets must be sorted by key columns. If the data in your import file is not sorted, check this box to instruct the task execution to sort data in all the Excel sheets automatically. Note that sorting of large data volumes may take some time.

Note: In the event the user has the necessary permissions, they can perform the import as a different user. The Execute as Other User field is then available below the File Handling field (see Executing Rules as Other User on page 827 for more information).

2. Select the format of the file to be imported then select the import source.
3. If you are uploading the file from your local PC, click **Browse** to open a standard Windows file browser then browse to and select the file to be uploaded.

   If you are picking up the file from Confirmit's or an external FTP location, type the file name and other relevant data into the appropriate fields.
4. Click **Next** to progress to the next step in the procedure.

Note that the options available in the dialog in step 2 will depend on the import format you have selected in step 1.

28.4.2.1. Importing a Delimited Text File

If you have selected the Format in step 1 of the procedure to be Delimited Text File, then the dialog that opens in step 2 will be as shown below.

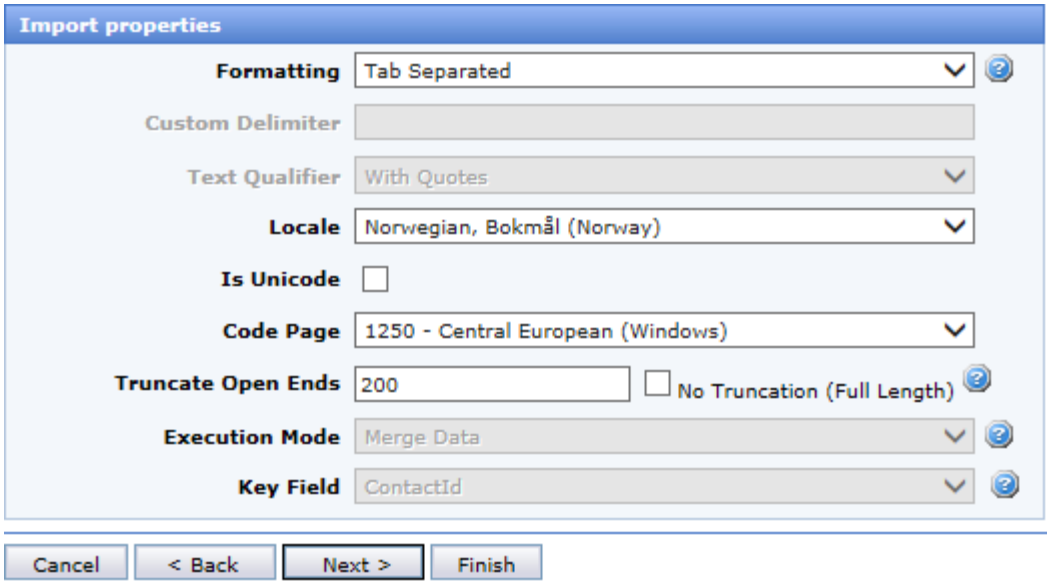


Figure 915 The second stage of the Export dialog for a Delimited Text File import

The options are as follows:

- **Formatting**- a delimiter is a sequence of one or more characters used to specify the boundary between separate, independent regions in plain text or other data stream. An example of a delimiter is the comma character in a sequence of comma-separated values. Select the delimiter that has been used in the data file to be imported. If you select "Custom", you can then define any single keyboard character.
- **Text Qualifier -** this property is only available when you select “Formatting: Comma separated”. When "Comma separated" is selected, the comma character has a special meaning; it is used to separate the different values from the different variables. However during export commas will be removed from opentext answers since in this case the character has a different meaning. Adding quotes around an answer text ensures that the text remains unchanged.
- **Locale** - determines the formatting of elements such as numbers (decimal point) and dates/times. Select the locale appropriate to the format used in the file.
- **Is Unicode** - enables the software to handle Asian languages. Unicode is recommended for files containing data in languages that use either Unicode encoding or other encoding. The user can choose any language when designing a questionnaire.
- **Code Page** - if Unicode is not selected, choose a code page from the drop-down list.

- **Truncate Open Ends -** for Open Ends (Open Text questions with no field width specified), it is recommended to truncate texts to improve performance. If a number of characters is specified for the Open Ends Width, texts longer than this limit, if any, will automatically be truncated. If No Truncation (Full Length) is selected, the whole text will be imported/exported, but the task will take significantly longer to execute.

- **Execution mode** - select how the data is to be added to the target database.

  You can choose between three modes for importing the data, listed below. In all the modes the user will be asked to provide a key (see Key field below). The keys available are respid, responseid, and any field in the survey database that has an index (see The General Tab on page 251 for more information). To create an index on a field in a survey database, go to the question properties of the field and set the "Indexed" property (available on single and open text questions with a field width set), and then re-launch the survey. By employing this setting, you can then use for example email address, membership number etc. as a key. The rule executer reads the value of the selected key field in the incoming data file and checks to see if a row with the same key already exists in the target.

  - **Merge data** - all the data from the source will be added to the target survey database. Any records in the source that already exist in the target survey database will be updated, and any records in the source that do not currently exist in the target survey database will be added to the target survey database.
  - **Append data** - any records in the source that do not exist in the target survey database will be added to the target survey database. Any records in the source that already exist in the target survey database will be ignored.
  - **Update data** - any records in the source that already exist in the target survey database will be updated with values from the source. Any records in the source that do not already exist in the target survey database will be ignored.

  In these scenarios, when new records are added, the new records are inserted both in the response data and in the respondent table (respondent list).

- **Key field** - the key field is used as a unique identifier to indicate which records are to be updated and which are to be appended. The key field is also used to map the responses in the top-level file with the responses in loop response files. The key field must exist in both the import file(s) and the database.

  System variables respid and responseid and all survey variables with the "Indexed" property set, will be displayed in the "Key field" drop-down. You may choose any survey variable that has a unique value for each respondent as key field. The key field should either be one of the system-provided ids (respid or responseid), or an open text question with a defined field width. Examples of key fields could be membership number, customer id or email address.

Important: The fields respid and responseid are system-provided ids in Confirmit. When appending records (inserting records that are not already present) through data import with one of these fields as key field, the system will replace the ids you import with new system-generated ids.

Make the appropriate selections, then click **Next** to move to the next step in the procedure.

28.4.2.2. Importing Excel

If you are importing an Excel file, when you click **Next** in the first stage of the procedure, the Import Properties dialog box opens as shown.

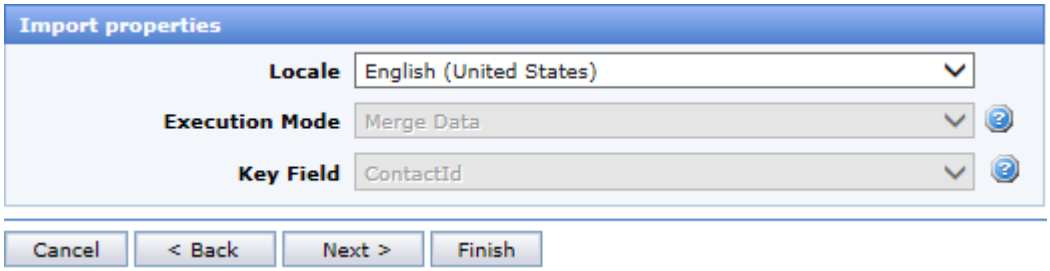


Figure 916 The second stage of the Import dialog for an Excel import

The options available are as follows:

- **Locale** - determines the formatting of elements such as numbers (decimal point) and dates/times. Select the locale appropriate to the formatting used in the file.
- **Execution mode** - select how the data is to be added to the target database.

  You can choose between three modes for importing the data, listed below. In all the modes the user will be asked to provide a key (see Key field below). The keys available are respid, responseid, and any field in the survey database that has an index (see The General Tab on page 251 for more information). To create an index on a field in a survey database, go to the question properties of the field and set the "Indexed" property (available on single and open text questions with a field width set), and then re-launch the survey. By employing this setting, you can then use for example email address, membership number etc. as a key. The rule executer reads the value of the selected key field in the incoming data file and checks to see if a row with the same key already exists in the target.

  - **Merge data** - all the data from the source will be added to the target survey database. Any records in the source that already exist in the target survey database will be updated, and any records in the source that do not currently exist in the target survey database will be added to the target survey database.
  - **Append data** - any records in the source that do not exist in the target survey database will be added to the target survey database. Any records in the source that already exist in the target survey database will be ignored.
  - **Update data** - any records in the source that already exist in the target survey database will be updated with values from the source. Any records in the source that do not already exist in the target survey database will be ignored.

  In these scenarios, when new records are added, the new records are inserted both in the response data and in the respondent table (respondent list).
- **Key field** - the key field for import of contact databases is the system field contactid - the unique identifier for the contact.

Make the appropriate selections, then click **Next** to move to the next step in the procedure.

28.4.2.3. Importing Step 3

The third stage of the Import Properties dialog opens as shown. This dialog is common for both import formats.

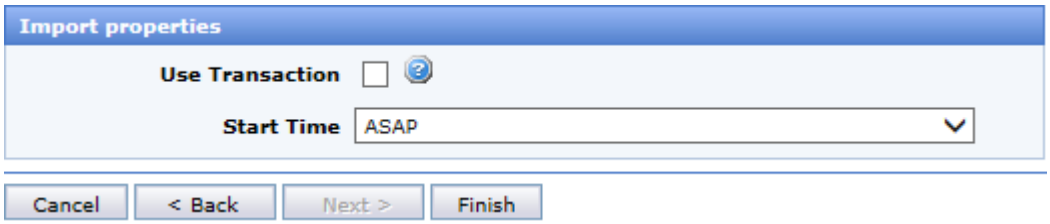


Figure 917 The third stage of the Import Properties dialog

The options available are as follows:

- **Use Transaction** - if this option is selected, all changes made to the target database will be rolled back if an error occurs.
- **Start Time** - the time when the export task is to commence. You can select ASAP (as soon as possible) or schedule it for a later time. If you schedule the task for later, then when you click **Finish**, a Recurrence setup page opens (see The Task Properties Recurrence Tab on page 60 for more information).

1. Make the appropriate selections and click **Finish**.

   The Rule Executer page opens, and the task will run when appropriate. Here you can see the status of the task, and select to be notified on completion if desired. You can proceed with other tasks as soon as you have clicked **Finish**.

If the imported file contains errors, you will receive an email containing two files; one file contains the invalid records, and the other contains an explanation of why the records are invalid.

28.4.3. Templates

Here you can define export templates. Refer to chapter 2 of the Data Processing User Guide for further information.

29. APPENDIX A: LIMITS

Respondent data

The question types and their limits are as listed below:

- **Open text** - Unlimited
- **Open text with field width specified in properties** - Limited to the number of characters specified
- **Numeric** - 38 digits

Note: Excel has a display limit of 15 digits for numbers, so if a numeric question larger than this is exported to Excel then the numbers will be rounded and displayed in exponential notation. This is an Excel limitation so cannot be controlled by Confirmit. Two viable work-arounds are available here:
- Export the file as a text file and then import it to Excel in text format.
- If the numeric question is shown on a hitlist within Reportal, exporting the hitlist will result in the limitation. In this case, change the question type to Open text in Authoring, re-launch the survey and force the BitStream files.

- **Coded questions (single, multi and grid)** - 32 characters (default), but field width up to 40 characters may be set
- **Multi with open text property** - (same as open text)
- **Numeric List** - (same as Numeric)
- **Other specify-element ("other" property set in answer list)** - Unlimited
- **Loop** - (same as coded questions)

Note: The respondent table has a maximum limit of 1024 columns. However users should not exceed 900 columns as Confirmit also has a varying number of system-derived respondent columns and in subsequent releases may add to these. If the total column count exceeds 1024 the survey launch will fail.

Note: The respondent table for legacy databases has a maximum limit of 8060 characters per record (adding all maximum allowed 1024 columns together). This limit also includes the system variables, therefore the actual row size limit per record is less than 8060 characters. The system variables can take a maximum of 1221 bytes if all values are specified. This situation is however rare, and a realistic value is approximately 600 bytes. In the event the 8060 characters limit is exceeded, an error message will be displayed.

When using the optimized format (see The Optimized Database Format on page 38 for more information) there is no limitation on the number of characters when using an open text question without specifying a length. If your respondents are hitting the limit, you are recommended to change the database to the optimized format.

Meta data

- **Question title** - 255 characters
- **Question text** - 32767 characters
- **Question instructions** - 32767 characters
- **Answer/scale texts** - 2000 characters
- **Question ids** - 50 characters
- **Codes** - 32 characters (default). Only alphanumeric characters and underscore (_), no white space. The survey administrator can increase this limit to a maximum of 50 characters for individual questions (the Field Width property in the Question Properties sheet). Note that this maximum will not be a problem for single questions, however problems will arise during launch if grid and/or multi questions use the full 50-character codes - see the note below.

Note: In the database, the column headers are constructed as a combination of the question id and the code, and are limited to 50 characters. If this limit is exceeded for a header, then an error message will be displayed when you attempt to launch the survey. Care must therefore be taken when allocating codes for grid and multi questions if the code maximum has been increased above its default setting.

Scripts/masks

- **Script nodes** - 32767 characters
- **Validation code** - 32767 characters
- **Masks (code mask, scale mask, column mask)** - 255 characters

Recoded variables

Same as for ordinary question types, except for the extra element

- **Expression** - Unlimited

Respondent list

- **Values uploaded in the respondent list** - 255 characters

Note: If the "Use data types of background variables for fields in respondent data" option is selected (see The General Options Tab Properties on page 493 for more information), you can set up questions in the respondent list that will accept more than 255 characters. However for open text fields with no field width set in the background variable, or with the field width set higher than 4000, the respondent table will be given a field width of 255.

Data Processing

The service supports various data processing operations:

1. Data Processing Rules
2. Data Central Server Rules.
3. A data export/import wizard, which initiates Data Processing and Data Central Server rules.

Although Confirmit has designed the Service to handle the data processing strain generated by the most advanced activity of its clients, extreme use may cause performance issues or errors. Confirmit shall not be held responsible for issues relating to extreme use. The definition of "extreme use" will depend the data processing operations performed and the volumes of data being processed. The volume will be a factor of the number of records, number of variables, variable types and how densely populated the data is (i.e. how may of the data cells that have values). The following are general guidelines on the limits for the various data processing tasks, based on data sets of different sizes:

For data processing operations involving data sets with up to 100 variables:

- Data sets run through Data Central Server Rules (including SPSS export) should be limited to 750 000 records.
- Data sets run through Data Processing Rules (including Triple-S and delimited text export/import) should be limited to 1 000 000 records.

For data processing operations involving data sets with up to 1000 variables:

- Data sets run through Data Central Server Rules (including SPSS export) should be limited to 75 000 records.
- Data sets run through Data Processing Rules (including Triple-S and delimited text export/import) should be limited to 100 000 records.

For data processing operations involving data sets with up to 2000 variables:

- Data sets run through Data Central Server Rules (including SPSS export) should be limited to 37 500 records.
- Data sets run through Data Processing Rules (including Triple-S and delimited text export/import) should be limited to 50 000 records.

Translator

- The number of categories and/or scales that can be viewed in the translator interface is limited to 1300 per scale/answerlist.

Archiving

When using the Database Cleanup task, a report with a single datasource is soft-deleted a preset number of days after the survey is archived. For SaaS users in the Confirmit servers this is set to 14 days. For On-Premise users, the system administrator can adjust the system setting DaysToKeepSurveyDatabasesForDeletedProjects as required.

30. APPENDIX B: CONFIRMIT LANGUAGE CODES

Important
The list in this appendix contains the language codes that were included in the initial release, and some additional codes that have been included in later releases. Custom languages that are added to a server after the installation of Confirmit are assigned a Language code number automatically by the specific server, based on the order in which the languages are added to that server. Custom languages will therefore have different language IDs for each installation of Confirmit (On-Premise, SaaS Euro, SaaS US, SaaS Aus). Therefore, be aware that if you intend to export/import surveys between the different environments (On-Premise/Euro/US/Aus) and those surveys use custom languages, you should compare the relevant language codes for the sites you are exporting from and to, and edit the XML export files as appropriate.

For each installation; go to the Home > Help > Language Overview menu command to view a list of the languages, with their applicable codes, that are available on that particular server.

The texts and messages presented to users and/or respondents are translated into a number of "standard" languages. These are listed in the Standard Languages section in the Survey Management chapter (see Standard Languages on page 193 for more information).

Language code	Language	Sub-name	Combident	Character set
54	Afrikaans		af	Western European (ISO)
28	Albanian		sq	Western European (ISO)
522	Amharic (Ethiopian)		am	
1	Arabic		ar	Arabic (ISO)
5121	Arabic	Algeria	ar_al	Arabic (ISO)
15361	Arabic	Bahrain	ar_ba	Arabic (ISO)
3073	Arabic	Egypt	ar_eg	Arabic (ISO)
2049	Arabic	Iraq	ar_iq	Arabic (ISO)
11265	Arabic	Jordan	ar_jo	Arabic (ISO)
13313	Arabic	Kuwait	ar_ku	Arabic (ISO)
12289	Arabic	Lebanon	ar_le	Arabic (ISO)
4097	Arabic	Libya	ar_li	Arabic (ISO)
6145	Arabic	Morocco	ar_mo	Arabic (ISO)
8193	Arabic	Oman	ar_om	Arabic (ISO)
16385	Arabic	Qatar	ar_qa	Arabic (ISO)

Language code	Language	Sub-name	Combident	Character set
1025	Arabic	Saudi Arabia	ar_sa	Arabic (ISO)
10241	Arabic	Syria	ar_sy	Arabic (ISO)
7169	Arabic	Tunisia	ar_tu	Arabic (ISO)
14337	Arabic	U.A.E.	ar_ua	Arabic (ISO)
9217	Arabic	Yemen	ar_ye	Arabic (ISO)
43	Armenian		hy	Unicode (UTF-8)
77	Assamese		as	Unicode (UTF-8)
44	Azeri		az	Unicode (UTF-8)
2092	Azeri	Cyrillic	az_cy	Unicode (UTF-8)
1068	Azeri	Latin	az_la	Unicode (UTF-8)
45	Basque		eu	Western European (ISO)
35	Belarusian		be	Cyrillic (ISO)
69	Bengali		bn	Unicode (UTF-8)
517	Bosnian		bo	
2	Bulgarian		bg	Cyrillic (ISO)
523	Burmese		br	Unicode (UTF-8)
36363	Burmese		br_br	Unicode (UTF-8)
3	Catalan		ca	Western European (ISO)
4	Chinese		zh	Unicode (UTF-8)
3076	Chinese	Hong Kong SAR, PRC	zh_hk	Unicode (UTF-8)
5124	Chinese	Macau SAR	zh_ma	Unicode (UTF-8)
34820	Chinese	Mandarin	zh_mn	Unicode (UTF-8)
2052	Chinese	PRC	zh_pr	Unicode (UTF-8)
32772	Chinese	Simplified	zh_sm	Chinese Simplified (GB2312)
4100	Chinese	Singapore	zh_si	Unicode (UTF-8)

Language code	Language	Sub-name	Combident	Character set
1028	Chinese	Taiwan	zh_ta	Unicode (UTF-8)
31748	Chinese	Traditional	zh_cht	Chinese Traditional
33796	Chinese	Traditional_old	zh_tdo	Chinese Traditional
518	Croatian		hr	
5	Czech		cs	Central European (ISO)
6	Danish		da	Western European (ISO)
19	Dutch		nl	Western European (ISO)
2067	Dutch	Belgium	nl_be	Western European (ISO)
1043	Dutch	Netherlands	nl_nl	Western European (ISO)
9	English		en	Western European (ISO)
3081	English	Australia	en_au	Western European (ISO)
10249	English	Belize	en_be	Western European (ISO)
4105	English	Canada	en_ca	Western European (ISO)
9225	English	Caribbean	en_cb	Western European (ISO)
6153	English	Ireland	en_ir	Western European (ISO)
8201	English	Jamaica	en_ja	Western European (ISO)
5129	English	New Zealand	en_nz	Western European (ISO)
13321	English	Philippines	en_ph	Western European (ISO)
33801	English	Somali	en_so	Western European (ISO)
7177	English	South Africa	en_sa	Western European (ISO)
32777	English	Tagalog	en_tg	Western European (ISO)
11273	English	Trinidad	en_tr	Western European (ISO)
2057	English	United Kingdom	en_gb	Western European (ISO)
1033	English	United States	en_us	Western European (ISO)

Language code	Language	Sub-name	Combident	Character set
12297	English	Zimbabwe	en_zi	Western European (ISO)
37	Estonian		et	Unicode (UTF-8)
56	Faeroese		fo	Western European (ISO)
41	Farsi		fa	Unicode (UTF-8)
525	Filipino		fil	Unicode (UTF-8)
11	Finnish		fi	Western European (ISO)
12	French		fr	Western European (ISO)
2060	French	Belgium	fr_be	Western European (ISO)
3084	French	Canada	fr_ca	Western European (ISO)
5132	French	Luxembourg	fr_lu	Western European (ISO)
6156	French	Monaco	fr_mo	Western European (ISO)
1036	French	Standard	fr_fr	Western European (ISO)
4108	French	Switzerland	fr_sw	Western European (ISO)
514	Gaelic		gd	
55	Georgian		ka	Unicode (UTF-8)
7	German		de	Western European (ISO)
3079	German	Austria	de_au	Western European (ISO)
5127	German	Liechtenstein	de_li	Western European (ISO)
4103	German	Luxembourg	de_lu	Western European (ISO)
1031	German	Standard	de_de	Western European (ISO)
2055	German	Switzerland	de_sw	Western European (ISO)
8	Greek		el	Greek (ISO)
513	Greenlandic		gl	
71	Gujarati		gu	Unicode (UTF-8)
531	Haitian	Haitian Creole	ht	

Language code	Language	Sub-name	Combident	Character set
13	Hebrew		he	Unicode (UTF-8)
57	Hindi		hi	Unicode (UTF-8)
14	Hungarian		hu	Central European (ISO)
15	Icelandic		is	Western European (ISO)
33	Indonesian		id	Unicode (UTF-8)
32801	Indonesian	Bahasa	id_ba	Unicode (UTF-8)
1057	Indonesian	Indonesia	id_id	Unicode (UTF-8)
16	Italian		it	Western European (ISO)
1040	Italian	Standard	it_it	Western European (ISO)
2064	Italian	Switzerland	it_sw	Western European (ISO)
17	Japanese		ja	Unicode (UTF-8)
75	Kannada		kn	Unicode (UTF-8)
96	Kashmiri		ks	Unicode (UTF-8)
2144	Kashmiri	India	ks_in	Unicode (UTF-8)
63	Kazak		kk	Unicode (UTF-8)
520	Khmer		kh	Unicode (UTF-8)
33288	Khmer	Cambodian	kh_kc	Unicode (UTF-8)
87	Konkani		ki	Unicode (UTF-8)
18	Korean		ko	Unicode (UTF-8)
2066	Korean	Johab	ko_jo	Unicode (UTF-8)
1042	Korean	Korea	ko_ko	Unicode (UTF-8)
37906	Korean	Korean Rose	ko_ro	Unicode (UTF-8)
38	Latvian		lv	Unicode (UTF-8)
39	Lithuanian		lt	Unicode (UTF-8)
2087	Lithuanian	Classic	lt_cl	Unicode (UTF-8)

Language code	Language	Sub-name	Combident	Character set
1063	Lithuanian	Lithuania	lt_lt	Unicode (UTF-8)
47	Macedonian		mk	Cyrillic (ISO)
62	Malay		ms	Unicode (UTF-8)
2110	Malay	Brunei Darussalam	ms_br	Unicode (UTF-8)
1086	Malay	Malaysian	ms_ms	Unicode (UTF-8)
76	Malayalam		ml	Unicode (UTF-8)
515	Maltese		mlt	
88	Manipuri		ma	Unicode (UTF-8)
78	Marathi		mr	Unicode (UTF-8)
97	Nepali		ne	Unicode (UTF-8)
2145	Nepali	India	ne_in	Unicode (UTF-8)
20	Norwegian		no	Western European (ISO)
1044	Norwegian	Bokmål	no_bo	Western European (ISO)
2068	Norwegian	Nynorsk	no_ny	Western European (ISO)
72	Oriya		or	Unicode (UTF-8)
516	Pashto		ps	
33284	Pashto	Afgan	ps_af	
34308	Pashto	Deewa	ps_dw	
21	Polish		pl	Central European (ISO)
22	Portuguese		pt	Western European (ISO)
1046	Portuguese	Brazil	pt_br	Western European (ISO)
2070	Portuguese	Standard	pt_st	Western European (ISO)
70	Punjabi		pa	Unicode (UTF-8)
24	Romanian		ro	Central European (ISO)

Language code	Language	Sub-name	Combident	Character set
25	Russian		ru	Cyrillic (ISO)
79	Sanskrit		sa	Unicode (UTF-8)
26	Serbian / Croatian		sr	Unicode (UTF-8)
1050	Serbian / Croatian	Croatian	sr_yu	Central European (ISO)
3098	Serbian / Croatian	Cyrillic	sr_cy	Cyrillic (ISO)
2074	Serbian / Croatian	Latin	sr_la	Central European (ISO)
89	Sindhi		sd	Unicode (UTF-8)
519	Sinhalese		si	
27	Slovak		sk	Central European (ISO)
36	Slovenian		sl	Central European (ISO)
526	Sotho	Sesotho	st	
10	Spanish		es	Western European (ISO)
11274	Spanish	Argentina	es_ar	Western European (ISO)
16394	Spanish	Bolivia	es_bo	Western European (ISO)
13322	Spanish	Chile	es_ch	Western European (ISO)
9226	Spanish	Colombia	es_co	Western European (ISO)
5130	Spanish	Costa Rica	es_cr	Western European (ISO)
7178	Spanish	Dominican Republic	es_dr	Western European (ISO)
12298	Spanish	Ecuador	es_eq	Western European (ISO)
17418	Spanish	El Salvador	es_el	Western European (ISO)
4106	Spanish	Guatemala	es_gu	Western European (ISO)
18442	Spanish	Honduras	es_ho	Western European (ISO)
38922	Spanish	Informal	es_in	Western European (ISO)
2058	Spanish	Mexican	es_me	Western European (ISO)
3082	Spanish	Modern Sort	es_ms	Western European (ISO)

Language code	Language	Sub-name	Combident	Character set
19466	Spanish	Nicaragua	es_ni	Western European (ISO)
6154	Spanish	Panama	es_pa	Western European (ISO)
15370	Spanish	Paraguay	es_pa	Western European (ISO)
10250	Spanish	Peru	es_pe	Western European (ISO)
20490	Spanish	Puerto Rico	es_pr	Western European (ISO)
36874	Spanish	Spanish Informal	es_in	Western European (ISO)
1034	Spanish	Traditional Sort	es_es	Western European (ISO)
14346	Spanish	Uruguay	es_ur	Western European (ISO)
8202	Spanish	Venezuela	es_ve	Western European (ISO)
65	Swahili		sw	Unicode (UTF-8)
29	Swedish		sv	Western European (ISO)
2077	Swedish	Finland	sv_fi	Western European (ISO)
1053	Swedish	Sweden	sv_sv	Western European (ISO)
73	Tamil		ta	Unicode (UTF-8)
68	Tatar		tt	Unicode (UTF-8)
74	Telugu		te	Unicode (UTF-8)
30	Thai		th	Unicode (UTF-8)
39966	Thai	Lao	th_lo	Unicode (UTF-8)
1054	Thai	Thai	th_th	Unicode (UTF-8)
31	Turkish		tr	Turkish (ISO)
34	Ukrainian		uk	Cyrillic (Windows)
32	Urdu		ur	Unicode (UTF-8)
2080	Urdu	India	ur_in	Unicode (UTF-8)
1056	Urdu	Pakistan	ur_pa	Unicode (UTF-8)
67	Uzbek		uz	Unicode (UTF-8)
2115	Uzbek	Cyrillic	uz_cy	Unicode (UTF-8)

Language code	Language	Sub-name	Combident	Character set
1091	Uzbek	Latin	uz_la	Unicode (UTF-8)
42	Vietnamese		vi	Unicode (UTF-8)
512	Welsh		cy	
524	Xhosa		xh	Western European (ISO)
521	Zulu		zu	Western European (ISO)

SaaS only:
Confirmit has added some extra languages to the SaaS installation. On-Premise customers may also have additional languages set up on their servers, but the language codes and combidents may well differ from these.

31. APPENDIX C: RESERVED KEYWORDS

During the launch of a survey or when generating the database for a Professional Panel, a validation is conducted to check if any reserved Confirmit or JScript keywords have been used as Question IDs. As a result of this validation process either a warning will be displayed (when launching a survey in Authoring) or the task will be aborted (when generating the database for a Professional Panel survey).

The following Reserved Keywords must not be used as Question IDs:

Note: These Keywords are not case-sensitive, so for example neither "ANY" nor "any" can be used as a Question ID. Question IDs can however start with these character strings, so for example "Anyone" can be used.

A
abstract
action
aggregated
all
and
any
avg
between
boolean
break
by
byte
C
callback
case
caseid
catch
CatiExtendedStatus
__channels__
char
class
combined_sourceid
comment
con
conn
const
contains
continue

convert
count
createddate
date
datebetween
debugger
default
delete
DialType
do
double
else
enum
env
eq
extends
false
FilterStatus
FilterStatusDate
FilteredBySurveyId
final
finally
FirstEmailedDate
float
floor
for
function
ge
goto
group
gt
id
if
implements
import
in
instanceof
int
interface

interview_end

interview_end_time

interview_start

interview_start_time

interviewer

interviewerid

invalidresp (special case - see below)

in_use

isfalse

istrue

iterationid

its

l (except for use under special conditions (see Handling Respondents in Multilingual Surveys on page 581 for more information)

L (except for use under special conditions (see Handling Respondents in Multilingual Surveys on page 581 for more information)

lastchannel

lastcomplete

lastdevicetype

lastrenderingmode

last_handled

last_touched

le

long

loopstate

lt

native

ne

never_again

new

none

noofemailssent

not

not_in_quota

notin

null

or

order

package

page

panelid
PanelistCreatedDate
panelistid
PanelistModifiedDate
private
projectid
protected
public
PValDate
PValInHier
PValNum
PValStr
PValStrArr
question
R
recoding
respid
responseid
return
rid
right
rolling
round
rowguide
S
sample_category
select
short
smtpstatus
source_projectid
source_responseid
state
static
status
string
super
surveylink
switch
synchronized

this

throw

throws

to

todate

transient

tries

true

try

typeof

unique_sourceid

var

void

volatile

while

with

invalidResp - This is a special case. A question with invalidResp as its qid can be used to exclude certain records from reporting, for example if you suspect the survey respondent has just provided random answers. Responses with this flag set to 1 (TRUE) will not be written to hubs in SmartHub and “reporting data”, so will not be included in Reportal, Instant Analytics, Discovery Analytics, Active Dashboards, Fieldwork Reports or Studio. It will not affect "real-time" hitlists or Reportal reports using BitStream, or response rate reports/survey metrics in Professional Authoring/Survey Designer. The invalidResp variable does not lead to any changes in the survey engine/quota system – users will have to update quota targets accordingly when invalidating responses (e.g. increasing targets). The invalidResp variable will be available in data exports and in the data editor in Professional Authoring, and through APIs, and data with this flag set will be included when using APIs, or when Professional Users do data exports or look at data in the survey data editor. See also the separate SmartHub User Guide.

The following can only be used in respondent lists:

userid

password

language

The following cannot be used with a Contact DB:

ContactId

ValidPeriod_From

ValidPeriod_To

IsCurrent

Modified

Created

If the following are used as question ids, issues will arise when generating BitStream files. These should therefore not be used if reporting or sampling with BitStream files:

CON

PRN

AUX

NUL

COM1

COM2

COM3

COM4

COM5

COM6

COM7

COM8

COM9

LPT1

LPT2

LPT3

LPT4

LPT5

LPT6

LPT7

LPT8

LPT9

(These are all supported by SmartHub/Reporting Data).

The iPhone and Android phone layout JavaScript depends on the class name "question" for identifying the container div to be changed when paging through questions. If anything with the class "question" is added to a survey, it will break touch rendering mode. The CSS class name "question" is therefore a reserved word.

32. APPENDIX F: EXPORT FILENAME DYNAMIC VALUES

All export tasks will generate files with unique names in the following format: <projectid>_<userid>_<taskid>.<extension>. The "Override file name" functionality, available as a checkbox on all export dialogs, allows you to override this system-generated name.

Note: The '_^PROJECTID^_' part of the name will be replaced by the real survey id during the export. Default is ^PROJECTID^_^USERID^_^TASKID^ (if Date Filter is used, then ^START^ and ^END^ will also be included). ^PROJECTID^ is only "required" when executing a rule; it is not "required" when running an export using the Export GUI.

You can add dynamic values to the overriding file name such that the file name becomes more intuitive and it is easier to see what the file contains. The following dynamic values can be added to the file name:

- ^PROJECTID^ - the project id for the current project
- ^TASKID^ - the task id of the current export task
- ^USERID^ - the user id of the current user
- ^NOW^ - the current date (yyyyMMdd)
- ^YEAR^ - the current year
- ^MONTH^ - the current month with no leading zero
- ^MONTH2^ - the current month with leading zero when appropriate
- ^DAY^ - the current day with no leading zero
- ^DAY2^ - the current day with leading zero when appropriate
- ^HOUR^ - the current hour with no leading zero
- ^HOUR2^ - the current hour with leading zero when appropriate
- ^MINUTE^- the current minute with no leading zero
- ^MINUTE2^ - the current minute with leading zero when appropriate
- ^START^ - the start date (yyyyMMdd) in the date filter
- ^STARTYEAR^ - the year in the date filter start date
- ^STARTMONTH^ - the month in the date filter start date with no leading zero
- ^STARTMONTH2^ - the month in the date filter start date with leading zero when appropriate
- ^STARTDAY^ - the day in the date filter start date with no leading zero
- ^STARTDAY2^ - the day in the date filter start date with leading zero when appropriate
- ^END^ - the end date (yyyyMMdd) in the date filter
- ^ENDYEAR^ - the year in the date filter end date
- ^ENDMONTH^ - the month in the date filter end date with no leading zero
- ^ENDMONTH2^ - the month in the date filter end date with leading zero when appropriate
- ^ENDDAY^ - the day in the date filter end date with no leading zero
- ^ENDDAY2^ - the day in the date filter end date with leading zero when appropriate

For example, using the following text and dynamic values: "Monthly_Export_^MONTH^_^YEAR^_^PROJECTID^_^TASKID^_^USERID^" will give the file name "Monthly_Export_2_2020_p99999999_0990909_johndoe.zip".

And "Monthly_Export_^MONTH2^_^YEAR^_^PROJECTID^_^TASKID^_^USERID^" will give the file name "Monthly_Export_02_2020_p99999999_0990909_johndoe.zip".

You can add different dynamic values for each export type.

Note that when exporting Survey Data to the FTP server in Survey Data > Exports or Data Processing rules, the Override Filename option accepts relative paths, as for example "..\..\myftpfile_in_another_folder.txt". In this case the file will not be stored in the default folder ("ProjectsData\p123123" or "RulesData\RuleN"), but rather directly under the (Company) Download folder.

Note: If you are using a recurring rule and the rule does not contain ^TASKID^, depending on the dynamic values used the output file may be overwritten each time the task is run.

33. APPENDIX G: USER ROLES AND PERMISSIONS

The Horizons platform includes a wide variety of features and functionalities for survey authoring, data management, and reporting. Optional modules and features can also be enabled to enhance the core platform, providing additional functionalities. Optional modules and features include but are not limited to: Action Management, Active Dashboards, CAPI, CATI, Discovery Analytics, Genius Text Analytics, Hierarchy Management, Instant Analytics, Model Builder, Panel Management, CRM Connect and Translation.

To ensure maximum data security and guarantee your staff has access to the functionality they need, Confirmit Horizons employs an array of user roles and permissions. Note that your users will only have access to modules and features that are enabled in accordance with your Confirmit contract, regardless of all other factors.

Within the terms of your contract, your users' access to Horizons, with all its licensed and optional modules, its system features and its data, is governed by each user's assigned User Role and the permissions allocated to each user. User Roles refer to a set or group of privileges that can be granted to one or multiple users who require common system accesses and permissions. A User Role must be assigned to every person who will be accessing Confirmit Horizons for any reason. Unless otherwise indicated, the system administrator is able to further tailor specific permissions within the constraints of the assigned User Role for each system user.

This appendix provides a high-level overview and indicates the maximum permissions that each User Role can have. Note that the individual users' actual permissions may vary based on your company's contract and/or the permissions granted by your designated system administrator.

33.1. Designated User Roles

Designated Users are system users who have a requirement to access system functionality to facilitate their day-to-day work. Designated Users are created by Confirmit according to the number of licensed users for each role specified in the contract.

- **Professional User** is the most common Designated User Role. The user can access and have permissions granted to the following modules and functionalities: Professional Survey Authoring, Survey Designer, Reportal, Instant Analytics, SmartHub, Hierarchy Management, Active Dashboards, Action Management, End User Management (see below), Panel, CAPI, CATI, Database Designer, Translation Module, CRM Connect and File Library. A Professional User may also be granted elevated permissions to serve as the System/Company Administrator. This User Role allows for the maximum number of permissions and flexibility available in Confirmit Horizons. It does not however have default permission to access Model Builder, Flex Extension development, or web services API.
- **Standard User** is intended for users who do not require the full set of features and functionalities available to Professional Users. This User Role can access Professional Survey Authoring, Survey Designer and Discovery Analytics with limited permissions. An example of how permissions are limited is that this user is only able to create and deploy a single-language survey. This user can also manually add respondents, send reminders and export survey data, and can also create, view, and manage reports in Discovery Analytics.
- **Analyst User** is intended for users who need access to review or analyze system data and perform functions in Active Dashboards, Action Management and Discovery Analytics. This User Role can access the following modules: SmartHub, End User Management (see below), Active Dashboards, Discovery Analytics and Action Management. In terms of permissions, this user is limited to only view permissions in SmartHub and the Contact Database. This user has full permissions to create, manage, and view Active Dashboards, Discovery Analytics, and Action Management. Analyst Users can also create End User lists and are able to modify only the End User lists they have created.
- **CATI Supervisor** is the Designated User Role for individuals responsible for directing day-to-day CATI operations. This user is able to create and manage interviewer accounts, manage sample and quotas, review CATI reports and dashboards, monitor interviews, edit verbatims, and play back recordings.
- **CATI Interviewer** is the Designated User Role for individuals responsible for conducting CATI interviews. This user is only able to view the surveys and respondents that are assigned to them.
- **CAPI Supervisor** is the Designated User Role for individuals responsible for directing the day-to-day CAPI operations. This user is able to create and manage field force interviewer accounts, and review CAPI reports and dashboards.

- **CAPI Interviewer** is the Designated User Role for individuals responsible for conducting CAPI interviews. This user is only able to view the surveys, respondents and quotas that are assigned to them.
- **Translator** is a User Role available for individuals responsible for translating surveys. Translators access Confirmit Horizons through a dedicated URL for security, and their permissions are strictly limited to viewing and translating assigned surveys. Any changes made by the Translators will be visible in the Confirmit Authoring interface. It is important to note that the permissions for this user role cannot be changed.
- **System/Company Administrator** is the person designated to administrate the software-related aspects of Confirmit (users, permissions, etc). The Administrator has access to all the company's projects, reports, forms and end-user lists, and can give other users read, write, delete, and administration permissions to these objects.

33.2. End User Access

End Users are user roles that are allocated by Designated Users to people who access Confirmit Horizons for end user functions such as accessing reports, dashboards and Action Management. Generally, these users are department leaders and executives who need access to the insights contained in reports and dashboards, but who are not directly involved in the detailed set up and day-to-day use of the software. With this user type, you contract your desired number of user licenses and then self-manage the assignment of access rights for those users.

- **Report Viewer Access (RVA)** is the most common End User type. This user type can access reports and dashboards that have been assigned to them in Reportal and Active Dashboards. An RVA user can also access all Action Management functions and edit hierarchies in Hierarchy Management if permissions are granted.
- **Report Analyst Access (RAA)** allows End Users to analyze existing report data and create tables. This is an intermediate user who has the ability to "play" with the data, analyze it on the fly, and create simple tables in Reportal. An RAA user can also access all Action Management functions and edit hierarchies in Hierarchy Management if permissions are granted.
- **Survey Dashboard & Instant Analytics Access** allows for access to Instant Analytics and Survey Dashboard.

33.3. Other User Types

In addition to the most common user types listed above, Confirmit also has Designated User roles for staff members responsible for managing the more technical aspects of your Confirmit Horizons platform, including secure FTP file transfers, APIs, and Flex Extension development. Contact your Confirmit sales representative or account manager for additional details.

33.4. User Roles and Permissions At-a-Glance

	Designated User Roles							
Function	**Professional**	**Standard**	**Analyst**	**Translator**	**CATI Supervisor**	**CATI Interviewer**	**CAPI Supervisor**	**CAPI Interviewer**
Professional Authoring & Survey Designer	✓	✓						
SmartHub	✓		✓					
Hierarchy Management	✓							
Admin & End User Management	✓		✓					
Reporting & Analysis	✓	✓	✓		✓		✓	
Action Management - Add-On	✓		✓					

Designated User Roles								
Genius Text Analytics - Add-On	✓							
CATI - Add-On	✓				✓	✓		
CAPI - Add-On	✓						✓	✓
Panel - Add-On	✓							
Translator module - Add-On	✓			✓	✓		✓	

End User Roles			
Function	**RVA License**	**RAA License**	**SD & IA License**
Professional Authoring & Survey Designer			
SmartHub			
Hierarchy Management	✓	✓	
End User Management			
Reporting & Analysis	✓	✓	
Instant Analytics			✓
Action Management - Add-On	✓	✓	✓
Genius Text Analytics - Add-On			
CATI - Add-On			
CAPI - Add-On			
Panel - Add-On			
Translator module - Add-On			

✓ Full permissions
✓ Limited permissions

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