



CONFIRMIT AUTHORIZING USER GUIDE

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

References to the CONFIRMIT company are indicated by the use of all upper case. References to the company's product Confirmit are indicated by initial upper case.

The information herein describes Confirmit Authoring and its features as of June 2011. New features may be introduced into Confirmit Authoring after this date. Go to www.confirmit.com or check "News" on the Customer Extranet for the latest updates.

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What's New in this Issue?

The following changes have been made in revision 3 of the Confirmit 16 Authoring User Guide:

- The Exporting Open Text Question Response Data section is added to the Online Coding Tool chapter, and the chapter is reorganized (see the Exporting Open-Text Question Response Data section on page 494 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 issue 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 Confirmit?

Confirmit is a comprehensive Web-based information retrieval and presentation software application. The Confirmit system comprises two main applications:

- **Authoring** - the application with which the user creates the survey questionnaires.
- **Reportal** - the application with which the user creates reports based on the data gathered by the questionnaires.

This document describes the Confirmit Authoring application. For further information on Reportal, refer to the Reportal User Documentation.

Several other subsidiary applications can be run as "add-ons" to the Authoring application to expand the system for use in specialized areas; for example Community Panels, CATI, CAPI and Express. Refer to the specific user documentation for further information on these applications.

1.1. About this Manual

The Confirmit 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 "On-Demand Environment only".

This document refers to different URLs, for example <http://author.confirmit.com> for Confirmit Authoring and <http://survey.confirmit.com/>... for interviews etc. These URLs refer to CONFIRMIT's On-Demand installation with Rackspace in USA. If you are a Confirmit On-Premise customer, or use another Confirmit On-Demand 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

There are three types of Confirmit user: Professional users, Standard users and Express users. Your Confirmit administrator is entitled to define these user levels.

On-Demand 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 Confirmit Authoring functionality, depending on the add-ons licensed by their company and the permissions allocated to them by their system administrators. The Professional user 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 project
- Programming questions and skip logic in Survey designer
- Setting up project properties (permissions, public survey/limited survey etc)
- Handling respondents in limited surveys
- Building panels of respondents
- Compiling/generating interview files to make the project go "live"
- Extend the library of interview layout templates
- Extend the library of questionnaires, questions, and forms
- Create and publish reports
- Opportunity to give the end users of results access to reports online

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; Standard users should ignore those parts of this documentation that do not apply to them. For Express users, a separate document exists describing the Express functionality - refer to the Express User Guide for further information.

1.2.2. Standard Users

The Standard User is a level between that of the Professional user and the Express user. 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. Express Users

Note: Confirmit Express is a chargeable add-on.

Confirmit Express is a simplified version of Confirmit. Express is designed to be intuitive, the intention being that the user will be able to create Confirmit surveys, send them to respondents and process the results with no prior training and with a minimum of experience with the application.

Express users are set up with permissions to build and administrate questionnaires in Confirmit Express. This designer is intended for authoring surveys that do not require complex functionality. A user-friendly, step-by-step embedded online help is available in the Express questionnaire designer. Refer also to the Confirmit Express User Guide for further information.

1.3. Security Issues

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

1.3.1. Secure Sockets Layer (SSL)

To use HTTPS/SSL you must obtain a server certificate from a certification authority (such as VeriSign) and bind it to your Web server(s). Confirmit server customers are free to bind certificates to their servers. This is optional and not a Confirmit-related issue. With a certificate in place, users may connect using HTTPS (HTTP over SSL) as well as HTTP. It is also possible to enforce policies where only connections over a secure socket are accepted.

On-Demand only:

Confirmit has obtained and installed an SSL Secure Certificate on survey.confirmit.com.

If you want to run surveys using SSL, simply replace <http://> with <https://> in the survey link, for example <https://survey.confirmit.com/wix/pXXXXXXXX.aspx>.

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 using HTTPS, Confirmit will use slightly longer to load the pages, although this will not normally be noticeable.

When you are referring to images from non-secure sites on your pages, the respondent will get 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 should also be placed on a secure site.

Confirmit has developed the File Library functionality, where our customers can store the images that are used in surveys. The File Library allows you to upload, store, view and remove images, in a number of web-compatible formats. Currently .jpg, .gif, .bmp, .jpeg, .tif, .png, .css, .htm, .html, .js files are supported (see the File Library section on page 115 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 project, 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 project (object) inside Confirmit, the project 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 from the introduction of Confirmit 14, for end users (CAPI interviewers, report viewers, Analysts and Designers) and Authoring users (Professional, Standard, Express 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.

The Authoring (Express and Designer), Reportal and Community Portal modules all have '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 the Forgotten Password section on page 15 for more information).

All passwords are hashed and not transmitted in plain text. Consequently, 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 Community Panels (see the The Panel Settings section on page 424 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.

On-Demand 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 new password must be different from the last 12 passwords.
- **Minimum age** - the user will have to wait 24 hours after changing the password before being allowed to change it again.
- **Maximum number of login attempts** - after 5 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.
- **Uppercase characters** - the password must contain at least 1 uppercase letter.
- **Non-alpha characters** - the password must contain at least 1 character that is not a letter (a..z, A..Z).
- **Password length** - the password must contain at least 8 characters.
- **Password expiry days** - the password will expire after 60 days. (This will not apply for login to the CAPI console.)

For Authoring users, it is possible to enforce even stricter requirements through certain company settings. 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 new password must be different from the 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** - a required minimum number of characters that are not numbers (0..9) or letters (a..z, A..Z).

- **Uppercase characters** - a required minimum number of uppercase letters.
- **Non-alpha characters** - a required minimum number of characters that are not letters (a..z, A..Z).
- **Password length** - a required minimum number of characters in the password.
- **Password expiry days** - the password will expire after a number of days. (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.

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

1.3.4. 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 the Handling Respondents in Limited Surveys section on page 384 for more information), or sent to the FTP server for downloading (see the Data Transfer section on page 579 for more information). The users will then have to decrypt the files using their private PGP encryption keys.

When downloading files from the 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 the Respondent Uploading with Access to Data Transfer Encryption and FTP section on page 388 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 the Respondent Uploading with Access to Data Transfer Encryption and FTP section on page 388 for more information).

1.3.4.1. 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.

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 project 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 project data export and import, and the sub-folders within these folders are named with the Project ID numbers (found on the Home > Project List or the projects' 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.

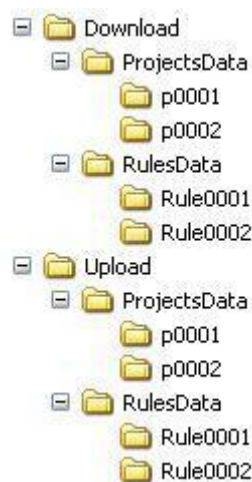


Figure 1 Example of the FTP folder structure

The project 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 project, 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 Confirmit Authoring (refer to the Data Processing documentation) and Community Panels (refer to the Community 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 project 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, then 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 Community 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.

1.3.5. 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 project administrator to make sure that this information is not misused in any way. In theory, the merge may take place without the respondent knowing it. 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.

1.3.6. Backup of Meta Data

On-Demand only:

"Meta Data" is all the data of a project 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.

1.3.7. Backup of Response Data

On-Demand 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 project'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.

1.3.8. 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", 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 Community 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.

1.4. System Requirements

1.4.1. Confirmit Users

Confirmit is built on the latest technology and is designed to be easy to use, scalable and stable. In order to support the feature set, the browser requirement for Confirmit is minimum Internet Explorer 7 (IE7) for Confirmit Authors, and Internet Explorer 8 is supported.

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.
 - o Go to **Tools > Internet Options > General > Temporary Internet Files > Settings**.
 - o In the "Check for newer versions of stored pages" list in the upper part of the dialog, select **Automatically**.
- Control the size of the Temporary Internet Files Folder (TIFF). If you allow for too large a cache size, this might have an adverse effect on how Internet Explorer performs the automatic check in the above point.
 - o Go to **Tools > Internet Options**, then in the Temporary Internet Files section click on **Settings**.
 - o Set the TIFF size to no more than 150Mb (if it is currently higher than 150 reduce the size; if already below, no action is required).
- Add the Confirmit Authoring URL(s) to the Internet Explorer Trusted Sites.
 - o Go to **Internet Properties > Security > Trusted Sites** then click the **Sites** button.
 - o Deselect the "Require server verification (https) for all servers in this zone" box then add the following two URLs: **author.confirmit.com** and **author.euro.confirmit.com** (type the addresses then click **Allow**).
 - o If you select not to include Confirmit Authoring in your Trusted Sites, you must disable pop-up blocking for these sites under **Tools > Internet Options > Privacy > Pop-up Blocker > Settings**.
- For Confirmit versions before C15 SP1, Set the **"Allow script-initiated windows without size or position constraints"** to **Enable**. Note that this is not necessary for version C15 SP1 and later.

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

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

- o Go to **Tools > Internet Options > General**.
- o In the Temporary Internet Files section, click the **Delete Files** button.

The Confirmit Authoring module is used for creating and managing surveys in an intuitive user interface that is accessible in a web browser. In some situations, a minimum set of requirements can provide limited functionality. In this case, an additional set of recommended requirements will provide full functionality for the relevant Confirmit module. Users finding that they lack functionality listed in the Confirmit Authoring User Guide or Confirmit Reportal User Guide should verify that their system is compliant with the recommended requirements rather than the minimum. The requirements for using Confirmit Authoring are listed below.

Confirmit Authoring requirements		
Element	Minimum	Recommended
Operating system	Microsoft Windows XP SP2	Microsoft Windows Vista or Windows 7.
Web browser	Microsoft Internet Explorer 7	Microsoft Internet Explorer 8.
Web browsing enhancement	Microsoft XML parser 3.0 SP3	Microsoft XML parser 6.0 (http://support.confirmit.com/xml/)
Office components	Microsoft Office 2003 formats-capable Office suite for opening exports - Microsoft Excel 2003 format capable spreadsheet editor required for viewing Rapid Results exports. - Microsoft Word 2003 format capable word processor required for viewing new Questionnaire Word Export introduced in Confirmit 11.	Microsoft Office 2007 or Microsoft Office 2010.

Browser capability requirements	
Element	Description
Cookies	Client cookies and session cookies must be allowed from the Confirmit server address. If the client browser does not accept cookies, Authoring users will be unable to log on to the system.
ActiveX	ActiveX component download and execution. Two components are used: ComponentOne VSFlexGrid Pro (available in both Unicode and non-Unicode versions)

	Microsoft Office Web Chart If ActiveX cannot be used on the client computer, the DHTML answer list editor may be used instead. However, chart images will not be displayed in Online Reporting if the MSOWC component cannot be loaded. The VSFlexGrid ActiveX component can still be used in the answer list but is not required. In Online Reporting, the Office Web Chart component is still required to view charts. ActiveX components and instructions for installation can be downloaded from the following web site: http://support.confirmit.com/activex In addition, client browsers must allow cookies from the 'confirmit.com' domain. Some firewalls and browser settings might prevent cookies from being downloaded. In this case, Confirmit project management will not work!
Popups	Users with Windows XP SP2 or using external popup blockers should configure the Confirmit servers in their "allowed" or "trusted" sites.

Browser security settings		
Element	Setting	Purpose / Effect
Binary and Script Behaviours	Enable	Treeview and viewing the project list require this setting.
Download Signed ActiveX controls	Enable/ Prompt	If using the VSFlexGrid Pro ActiveX component for editing answer lists, ActiveX needs to be enabled. If using the DHTML or Silverlight component for editing answerlists, ActiveX is not required.
Run ActiveX controls and plugins	Enable	Confirmit relies on ActiveX controls that are installed with Internet Explorer.
Script ActiveX controls marked as safe for scripting	Enable	Confirmit relies on ActiveX controls that are installed with Internet Explorer.
Font download	Prompt	Preview of a survey with a font that is not already installed will not work.
Allow META REFRESH	Enable	Automatic reloading of WI and DB generation progress page will not work when this is set to Disabled
Display mixed content	Prompt	Some templates previewed in HTTPS might use image sources from a HTTP site
Drag and drop or copy and paste files	Enable	You will not be able to drag images into WYSIWYG fields in Confirmit when set to Disable or Prompt
Submit non-encrypted form data	Enable	You will not be able to submit form data in Confirmit if this is set to Disable
Use Pop-up blocker	Enable	The first time a pop-up is launched from Confirmit, the user will need to "Allow pop-ups from Confirmit".
Userdata persistence	Enable	Confirmit stores a lot of information, such as size and positioning of objects, in user data.

Active scripting	Enable	Confirmit relies heavily on scripting in most parts of the application.
Allow paste operations via script	Enable	If this is set to Disable, users will not be able to paste into the WYSIWYG fields of Confirmit.

Requirements for Answerlists, Survey Data Template Editor and Online Coding		
Element	Minimum	Recommended
Microsoft Silverlight	Microsoft Silverlight 4.0 http://www.microsoft.com/silverlight/resources/install.aspx	(Same as minimum)

Note: Silverlight is not supported by Internet Explorer 64 bit. If you install Silverlight and attempt to use it a Microsoft error message will be displayed. The error message is misleading as it says that you do not have Silverlight installed, but if you return to the MS site it will confirm that you have the latest version installed.

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, Community Portal projects, and Reportal Viewer/Public Reports, on different browsers to ensure they look and function as expected/required on the different browsers.

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.

1.4.1.1. Preparing Websites with Active Content for Announced Browser Changes

In the wake of the "Eolas Patent Ruling" of August 11th 2003, Microsoft has recommended changes in handling of active content in web pages. Confirmit has implemented changes recommended by Microsoft and Macromedia to ensure that compliance is achieved while the user experience remains unchanged. For more information, refer to the following links:

<http://www.microsoft.com/presspass/press/2003/oct03/10-06EOLASpr.asp>

<http://www.macromedia.com/devnet/activecontent/articles/devletter.html>

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. Using the survey layout properties introduced in Confirmit 10 could also affect the browser compatibility, although normally only visually – full survey functionality should remain.

Confirmit Survey prerequisites (respondents)

Element	Minimum	Recommended
Operating system	Any	Any
Web browser	Any browser supporting HTML 3.23	Any browser supporting HTML 4.0, CSS, client side scripting, and XHTML.

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 The Advanced WI Features Tab section on page 189 for more information) are supported in IE6+ (Windows), Firefox 1.5+, Google Chrome, Opera 9+, 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 the Dynamic Questions section on page 330 for more information) is supported in IE6+ (Windows), Firefox 1.5+, Google Chrome, Opera 9+ and Safari 2+. This functionality is only available in surveys using "Survey Layouts" (see the Survey Layouts section on page 50 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. Do so by holding down the left mouse button and moving the mouse over the entire link. The link should become highlighted. After the link is highlighted, press the **[Ctrl]** and **[C]** keys on your keyboard. This will copy the link. Paste the link into your AOL address bar. That is the white field under 'People' at the top of your screen. You can paste the link by pressing the **[Ctrl]** and **[V]** keys on your keyboard. After you have pasted the link, press the **[Enter]** key on your keyboard, or click **[Go]** on the address bar.

1.4.3. 3rd Party Downloads

The Confirmit application does not rely heavily on 3rd party components. Currently three downloadable components are integrated, though you do not have to use any of them.

Area	Type	Company	See also
Reporting	Chart component	Visual components	http://www.visualcomponents.com
Questionnaire design	Grid component	VideoSoft	http://www.videosoft.com/

Other pieces of 3rd-party code have been incorporated into Confirmit (see the APPENDIX D: 3rd PARTY SOFTWARE COMPONENTS IN USE IN CONFIRMIT section on page 618 for more information).

2. Starting Confirmit – a General Overview

2.1. Logging into Confirmit

A valid username and password are required to log into Confirmit. Once you are logged in, a "user object" controls your access to any other object in the application. By default, only the Confirmit author who has created a project has access to any information about that project. This means that other authors will not know that a project exists, unless they are explicitly given access to the project by its creator. A Confirmit project has a range of access permissions, from none to full administrative control of the project. Refer to the Confirmit Administrator Manual for further details.

Users log in to Confirmit from the URLs below:

- USA site: <http://author.confirmit.com>
- Euro site: <http://author.euro.confirmit.com>

On-Demand only:

You can log in to Confirmit by clicking the appropriate link on the Confirmit home page, <http://www.confirmit.com/>.

When you access the link or the URL, the Confirmit login page opens. Here you must type in your user name and password, and click **Log in**. If your browser does not meet the browser requirements, when it attempts to log on to Confirmit an error message will be displayed.

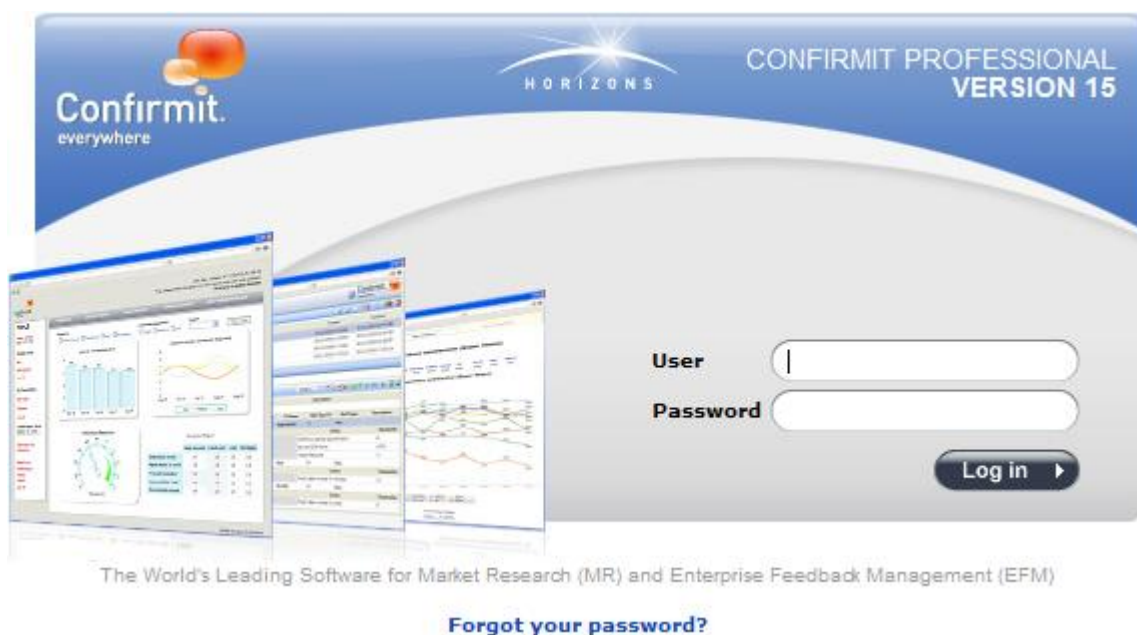


Figure 3 The Confirmit Login window

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.

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 the Password Policy section on page 3 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.

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 Survey Designer users log into Confirmit, the home page opens as shown in the example below.

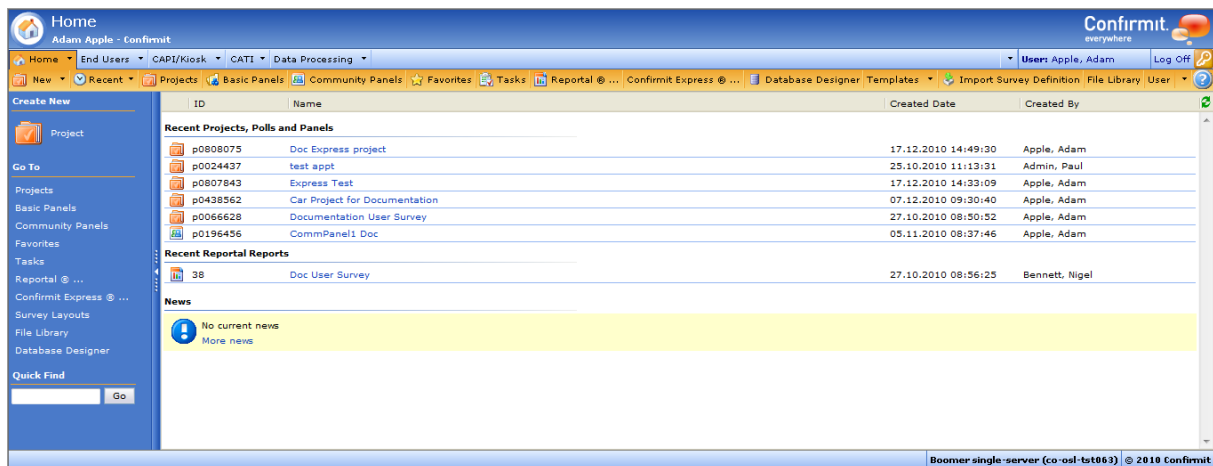


Figure 4 Example of a Professional user's Home page after logging in

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

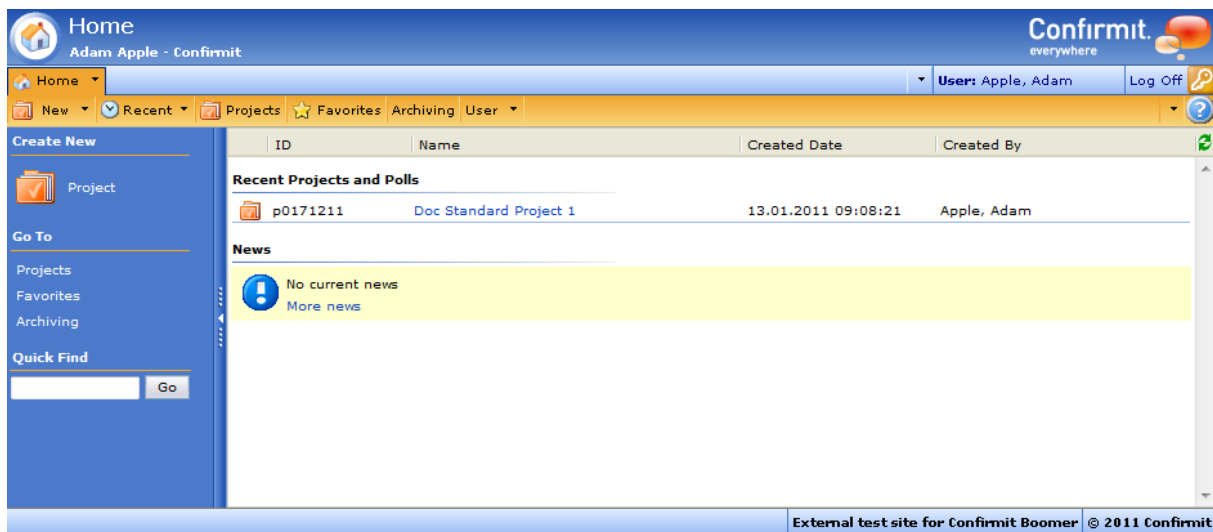


Figure 5 Example of a Standard user's home page after logging in

Express users will enter a different opening page - refer to the Express User Guide for further information.

The following chapters offer a detailed description of how to work in Confirmit, and descriptions of all the functionality in the menu system. This manual will concentrate on the Professional user interface.

2.2. Login 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 project, 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.

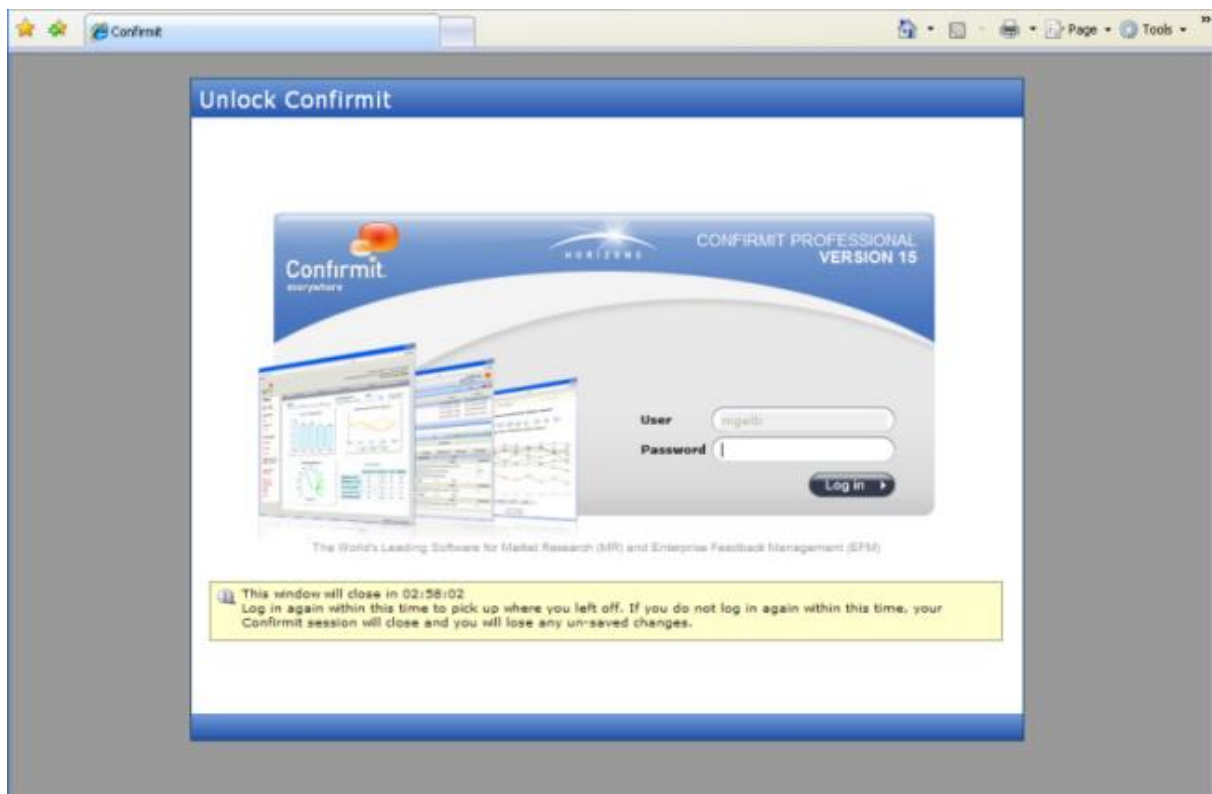


Figure 6 The login overlay that is displayed when a Confirmit session has timed-out due to inactivity

Note: If you had made some changes in your project and the login overlay appeared 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!).

2.3. Forgotten Password

Your Confirmit password is what prevents unauthorized people from using your Confirmit account and interfering with your projects. 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.

Enter your User ID and press Send. An email will be sent to you containing instructions for resetting your password.

User

Figure 7 The "Forgot your password?" dialog

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

A message is sent to Confirmit Support. They will send an email to the address registered to the username you have given, containing instructions for how you can reset your password.

2.4. Getting Help

Confirmit includes several sources of on-line assistance:

- Context-sensitive help.
- The Help Information page.

The following sections describe these in further detail.

2.4.1. Context-Sensitive User Assistance

Confirmit contains a built-in On-line User Assistance system to provide you with information should you require it. Click the ? button, located in the upper right corner of most of the windows, to open the assistance 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.

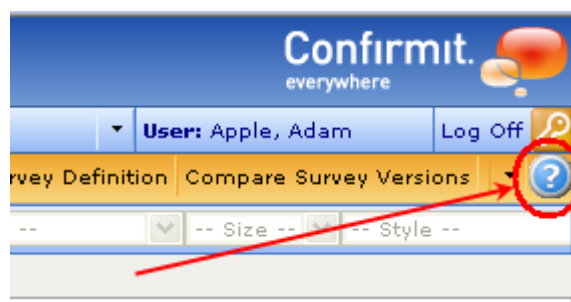


Figure 8 The User Assistance button

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.

2.4.2. The Help Information Page

Go to the **Home > Help > Help Topics** menu command to open the Confirmit Help information page.

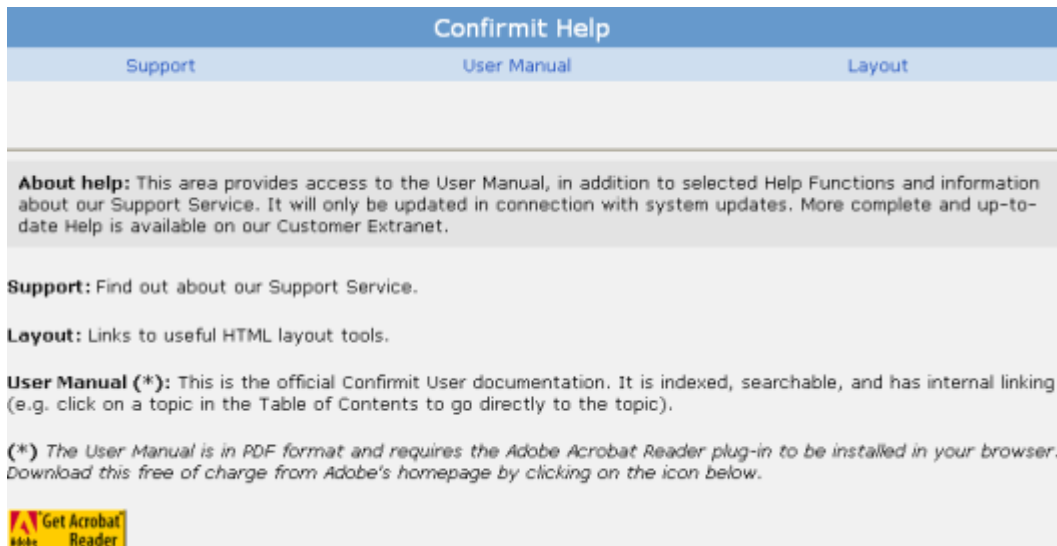


Figure 9 The Help Information window

From here you can go the Support Information page, open the Authoring and Reportal Help files (under User Manuals), and access some useful layout tools.

The User Manual is also available as a fully searchable .CHM file. To download this file, go to the Confirmit Extranet. Note that you will need a username and password to access this site.

3. Working in Confirmit

Most operations in Confirmit 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 Confirmit.

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.

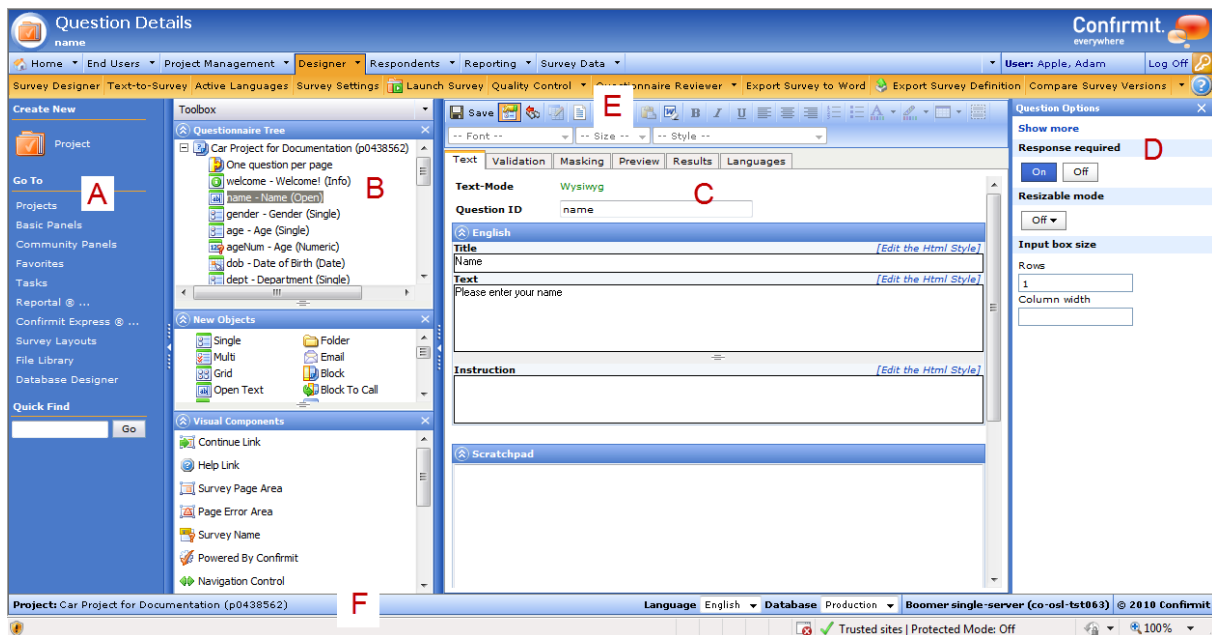


Figure 10 Panes and frames in Confirmit

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 projects, panels, and Reportal reports by their IDs or titles. If you have only one hit, the project/panel/report will open instantly. If you have more hits, the items will be displayed in a menu allowing you to select the item you are interested in. If you have hits within different categories (project, 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 11 The Pane Open/Close button

When you enter Survey Designer for a project, 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 **Question Details pane (C)** is the main frame in the Confirmit window.

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 more** button in the Properties pane (see the Property Sheets section on page 24 for more information).

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

3.2. Menus

The Confirmit menu system comprises two "main" menus and a number of sub-menus. The main menus are:

- The Home menu
- The Project/Panel menu.

Click the links below for further details. The other menus include:

- End users
- CAPI/Kiosk
- CATI
- Data Processing
- Translation
- Respondents
- Reporting
- Survey Data

Several of these 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.

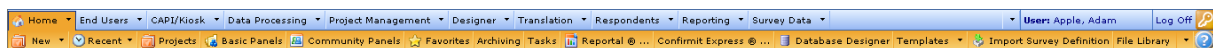


Figure 12 The Home menu

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.

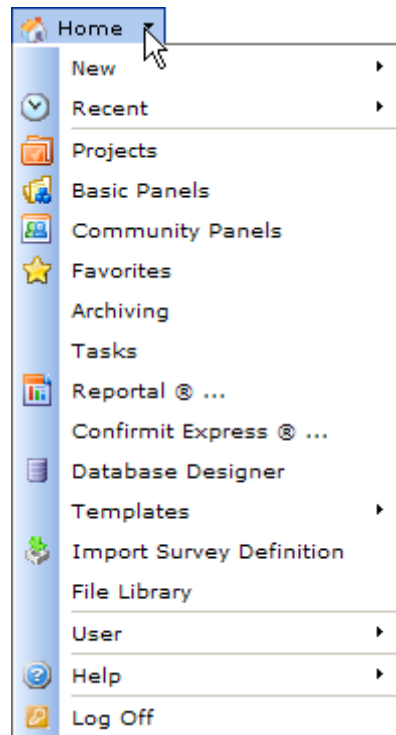


Figure 13 The Home drop-down menu

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. Project/Panel Menu

Once you choose a project or a panel, the Overview page and the **Project 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.

Note: 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.

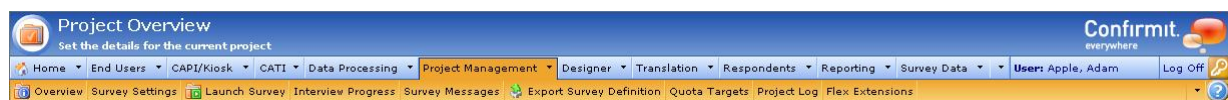


Figure 14 The Project Management menu

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

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

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 (note that 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 projects from which you may wish to copy questions to the current questionnaire.

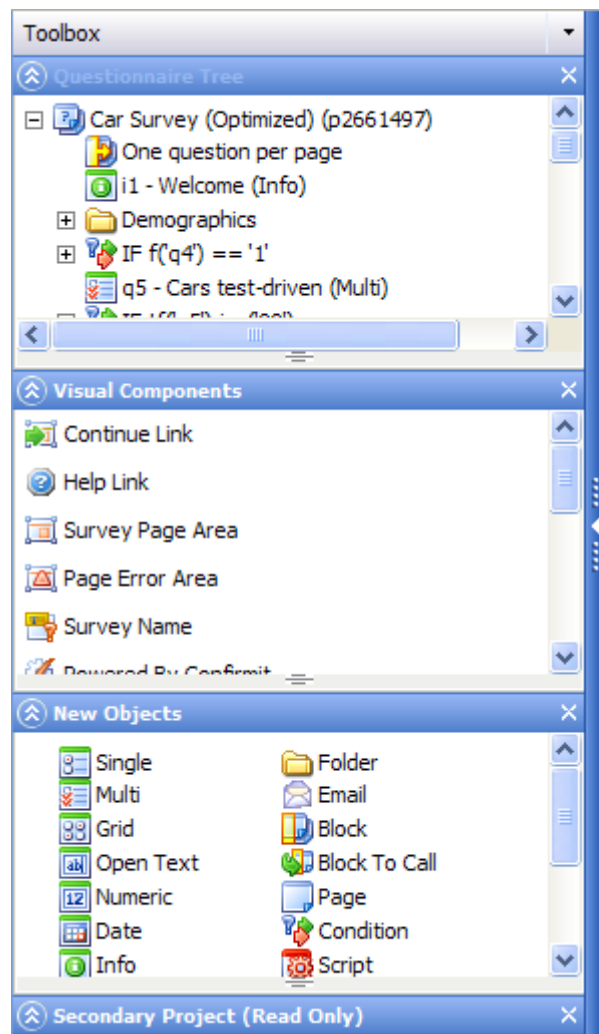


Figure 15 The Toolboxes

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.

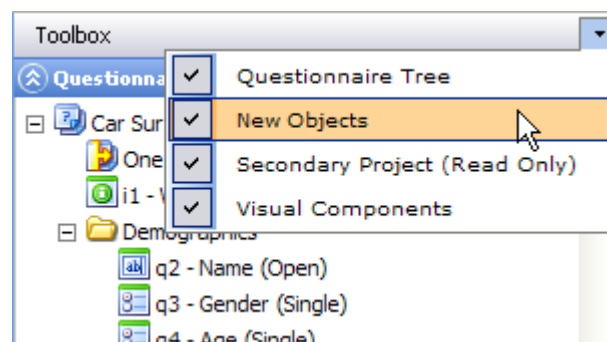


Figure 16 Removing toolboxes

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.

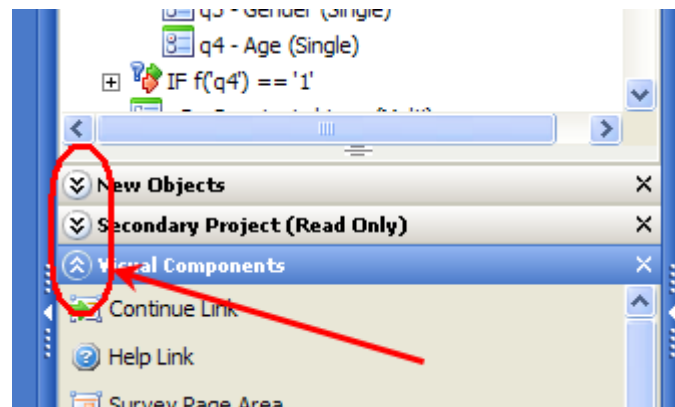


Figure 17 Collapse toolboxes

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.

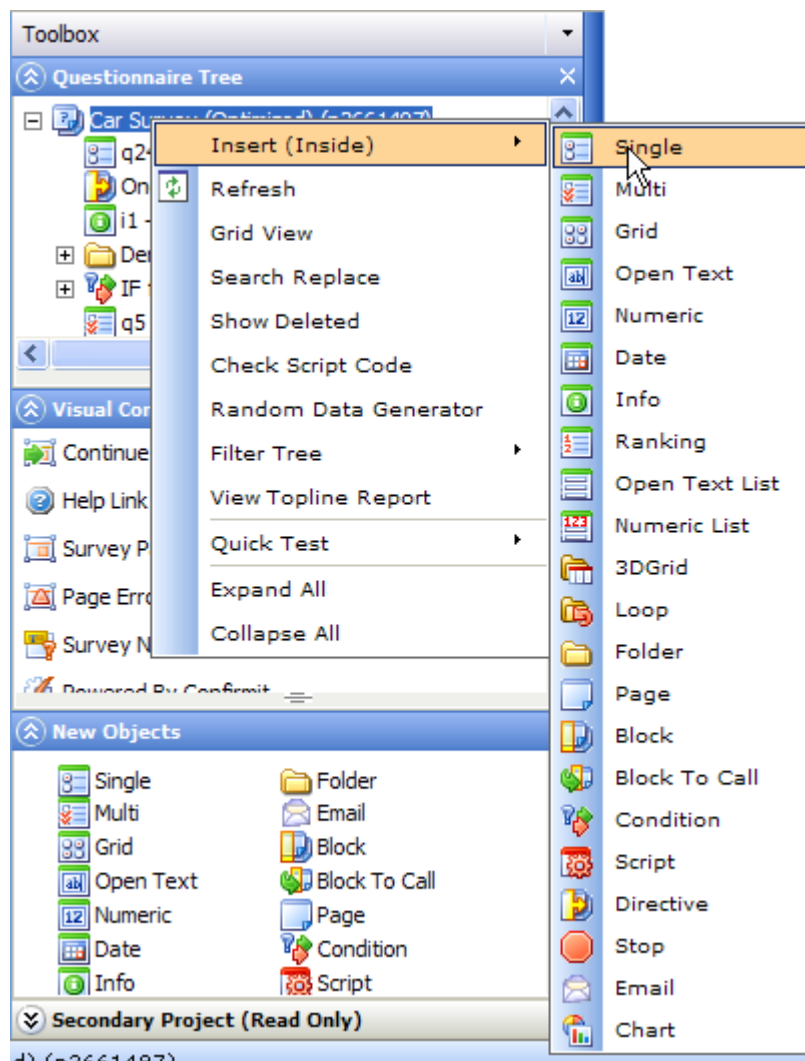


Figure 18 The project's right-click menu

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 the Spell Checker section on page 240 for more information).
- **Refresh** - refreshes the Questionnaire Tree to reflect the recent changes.
- **Grid View** - opens the Grid View configuration page.
- **Search Replace** - opens the Grid View configuration page for Search/Replace.
- **Preview** - shows the entire questionnaire in Preview mode.
- **Show Deleted** - shows any nodes that have been soft-deleted (see the Deleting Objects section on page 232 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 the Check Script Code section on page 339 for more information). Note that you do not have to compile or generate to use this feature.

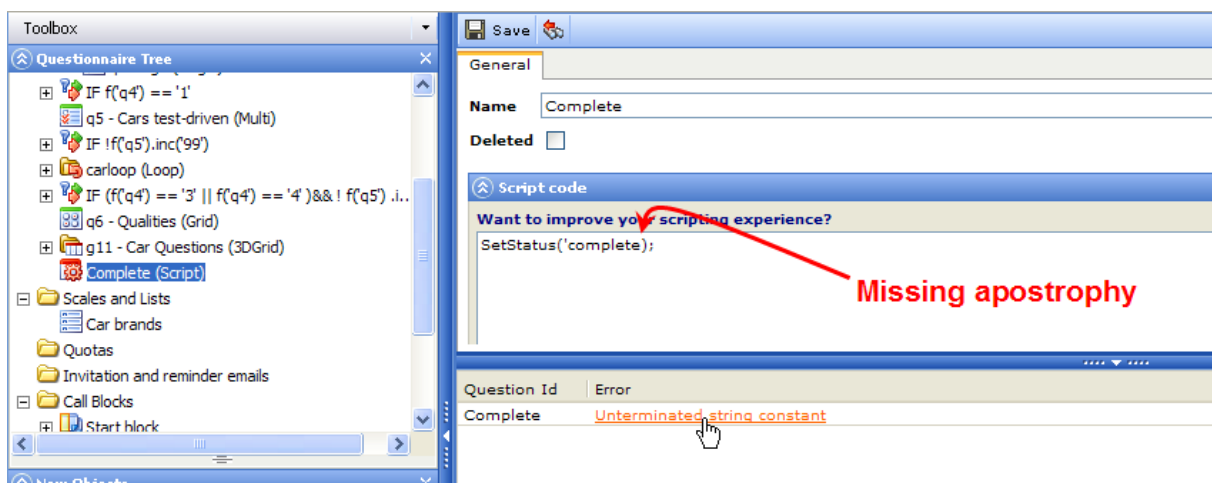


Figure 19 Checking script code

- **Random Data Generator** - [not Standard user] opens the Random Data Generator page (see the The Random Data Generator section on page 343 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 the Rapid Results section on page 501 for more information).
- **Quick Test** - enables you to test the questionnaire or individual questions (see the Quick Test section on page 339 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 the Deleting Objects section on page 232 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 section on page 230 for more information) can be right-clicked to display an action menu.

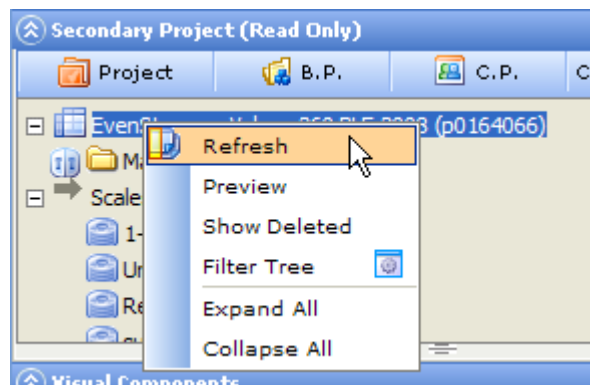


Figure 20 Menu in secondary projects

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 with a few of the most-used properties; click **Show more** (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.

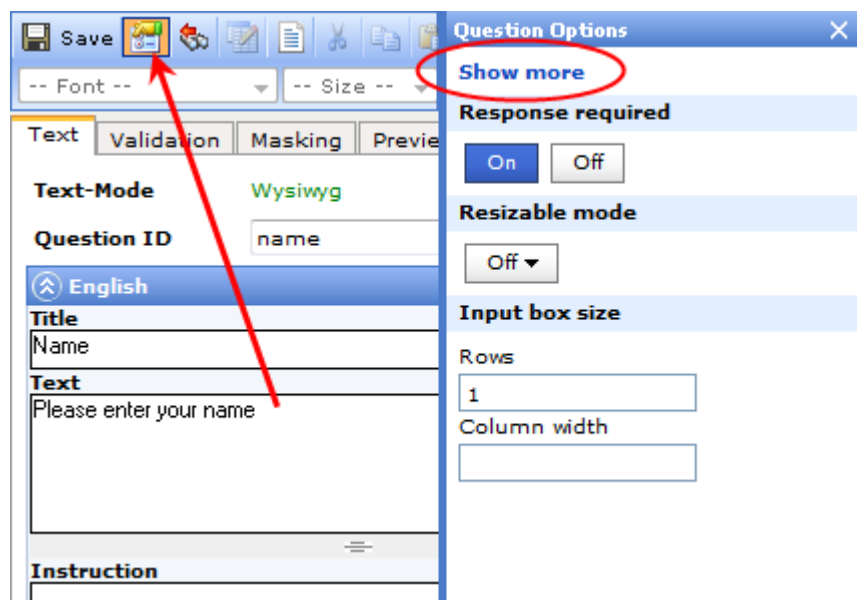


Figure 21 Example of a property sheet for a single question

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.

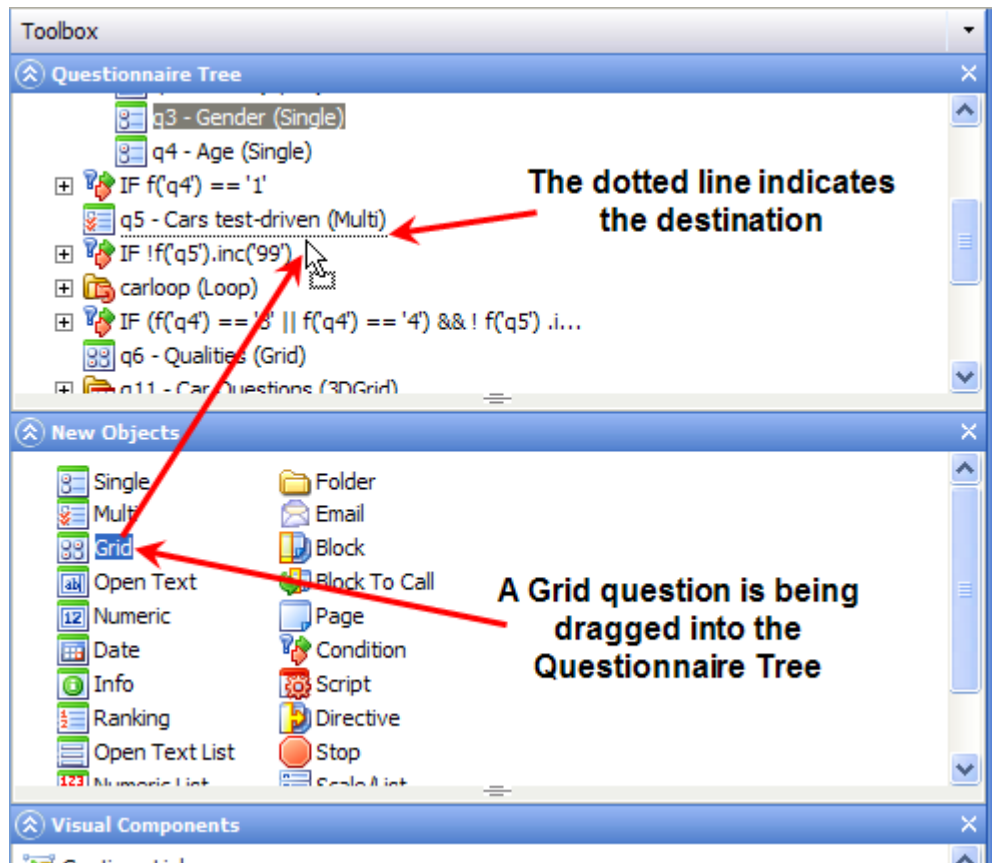


Figure 22 Drag-and-Drop operations

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.

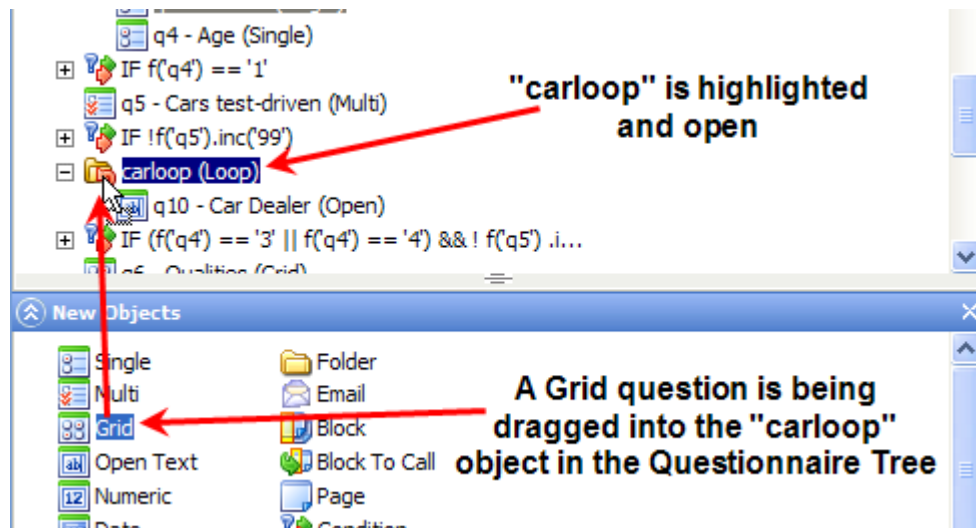


Figure 23 Drag-and-drop into folder

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.

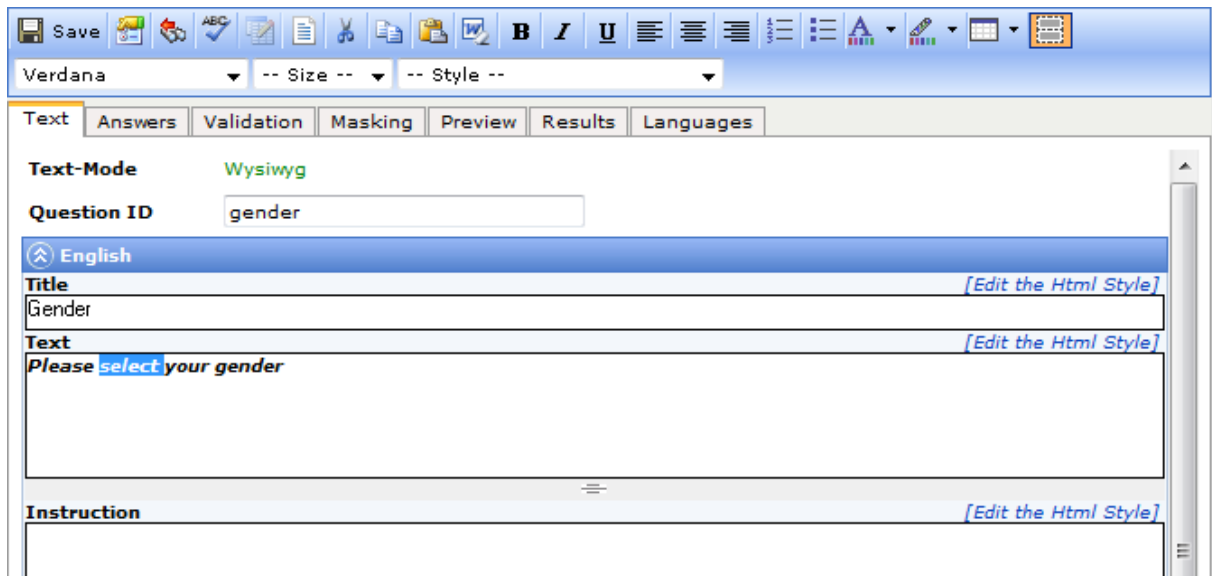


Figure 24 Working in the WYSIWYG editor

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.

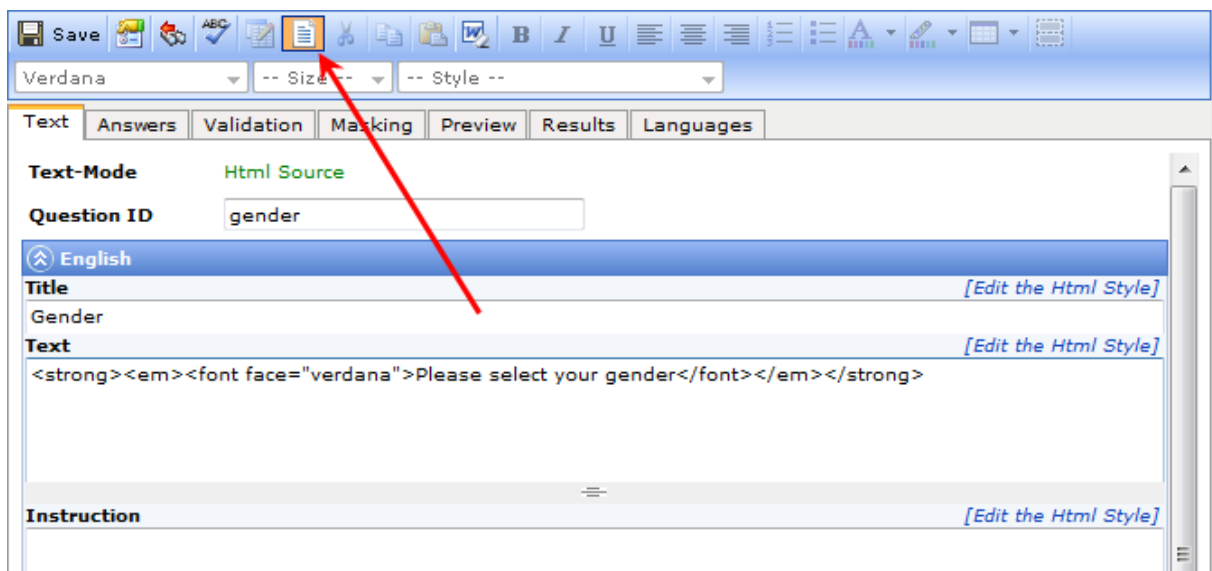


Figure 25 Using the HTML editor

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 the Database Designer section on page 276 for more information).

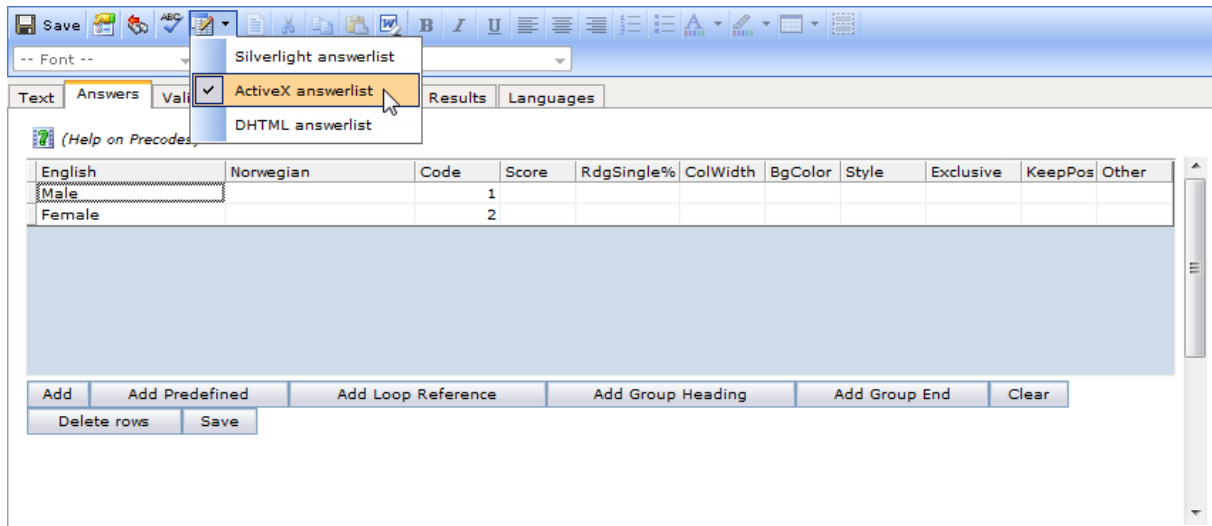


Figure 26 ActiveX answer list

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.

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.

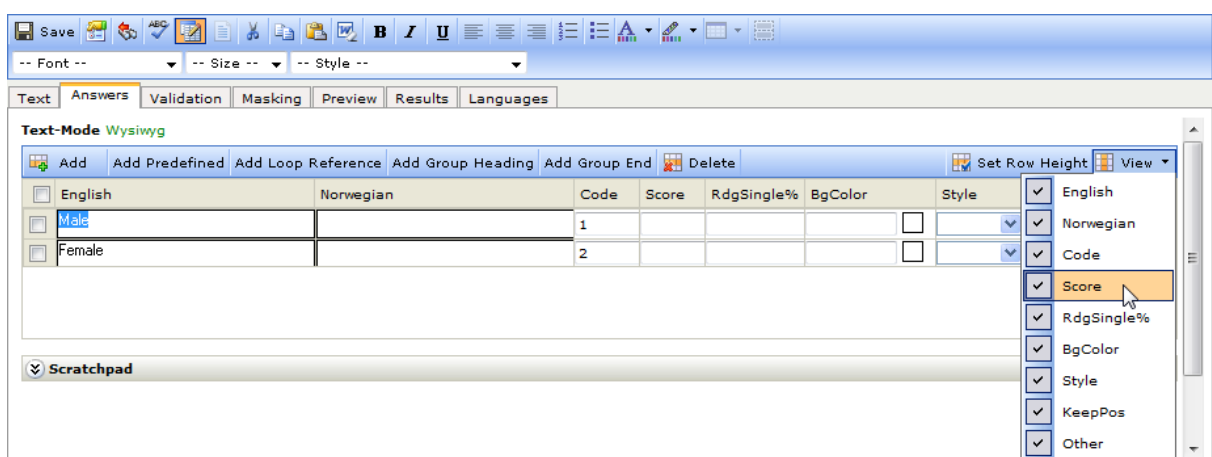


Figure 27 DHTML answer list

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**.

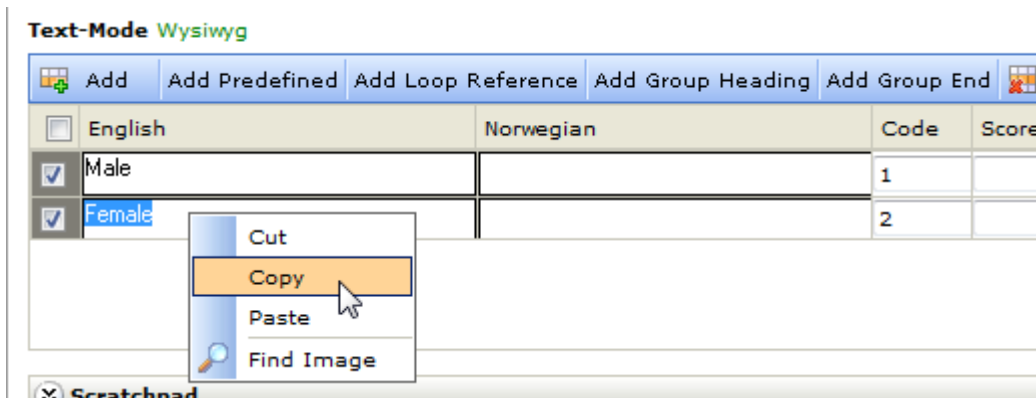


Figure 28 Copying rows in a DHTML answer list

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.

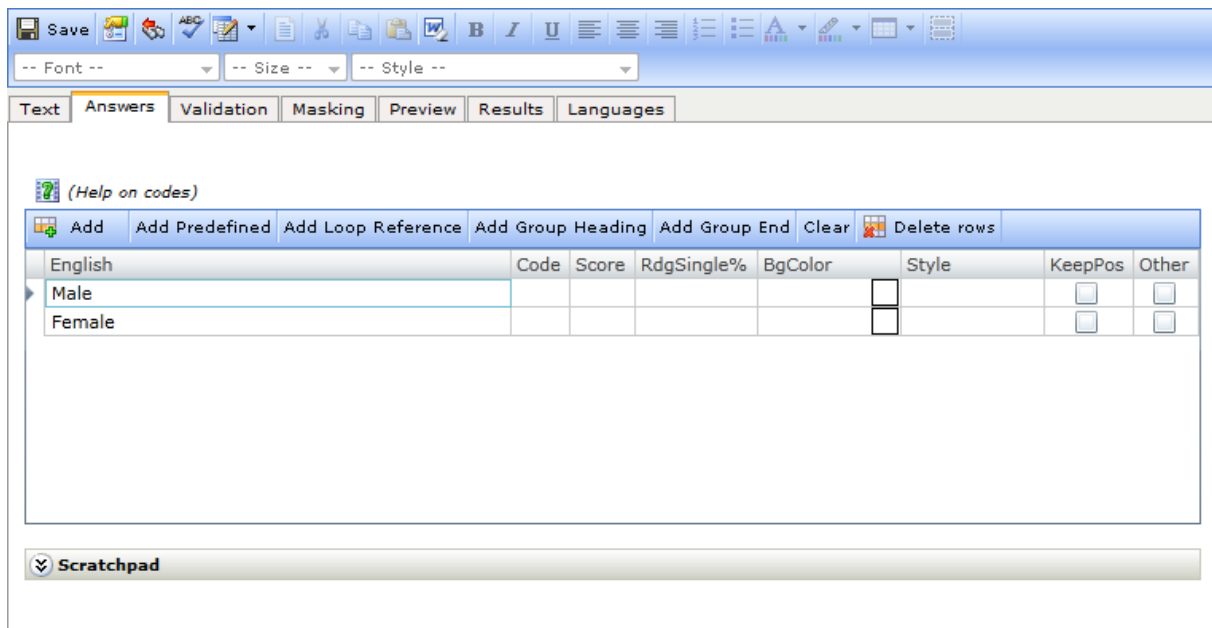


Figure 29 The Silverlight answer list

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.

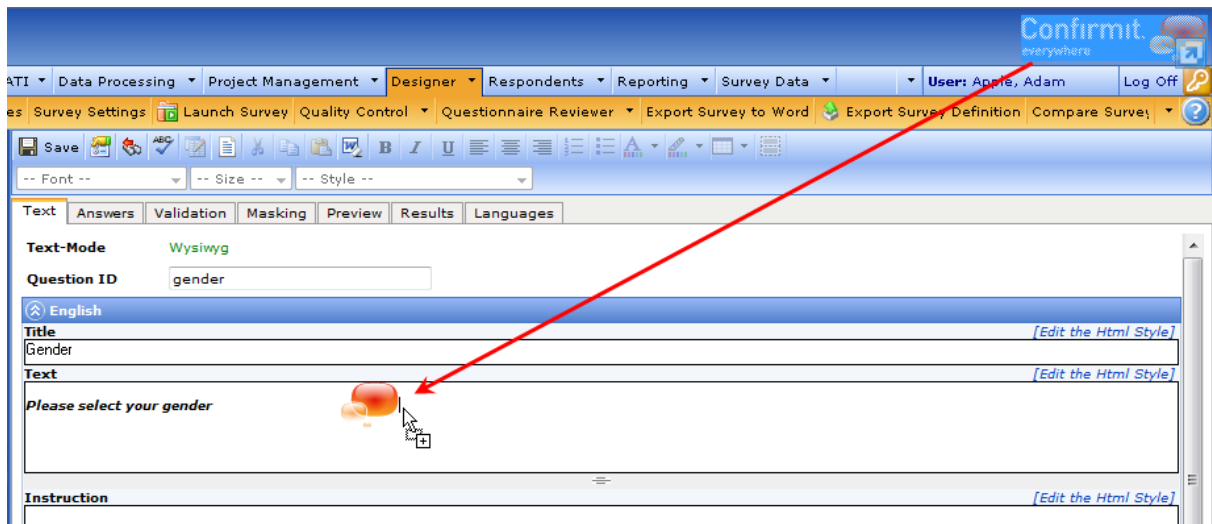


Figure 30 Dragging a logo into the text field

3.9. Language and Database Modes

Confirmit keeps two separate databases for each survey; a test database and a production database. When working with projects in Confirmit, you can switch between the Test and Production modes, and also select the default project language in multilingual projects, 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.

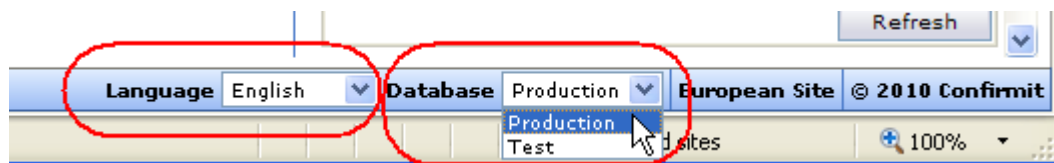


Figure 31 Language and database mode selection

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

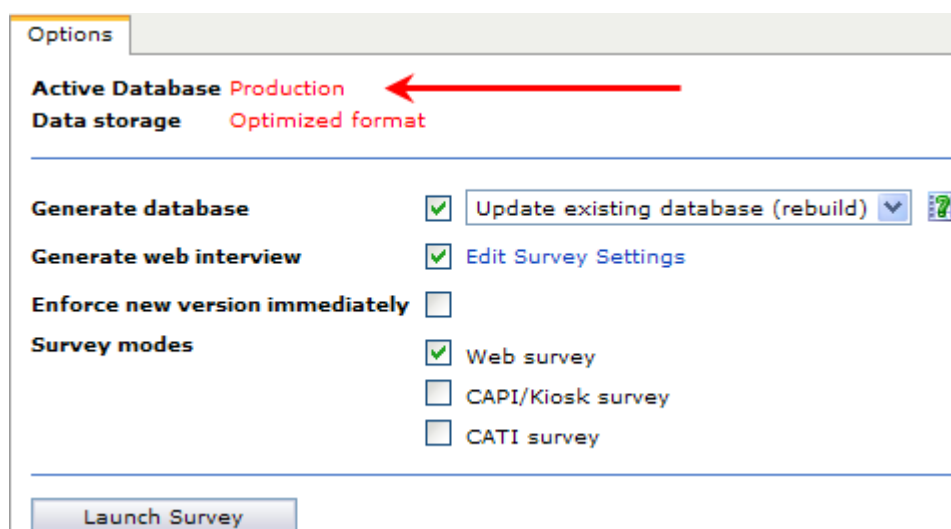


Figure 32 The active database shown in red text on the Launch Survey page

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 project language. Also, Standard users do not have access to the Test database, so the Database selection field is not available to them.

3.10. 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 projects. 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 projects on one single database instance. This is achieved by enabling the storage of response data from several projects 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 project is selected during project creation on the Project Name dialog (see the Creating a New Survey section on page 149 for more information), and can be changed on the Project Overview page. Note that the format must be selected before the Test or Production database is generated (the project 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 project can select the database type.

Note: When using Reportal with a project that uses the Optimized format, BitStream files must be used (see the BitStream Files section on page 524 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 superseded by Survey Layouts (see the Survey Layouts section on page 50 for more information).
- **Rule-based sendouts** - this functionality is superseded 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 superseded by Reportal. Refer to the Reportal User Guide for further information.
- **Individual Reporting** - this functionality is included in and superseded by Reportal. Refer to the Reportal User Guide for further information.
- **Filters** - this functionality is included in and superseded 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 superseded 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 The Online Coding Tool section on page 487 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 projects 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 projects 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.

3.11. Search Lists

You can search for existing Surveys, Panels, and Tasks. The Survey and Panel search lists function in the same fashion and have similar search options. Note that the Task search list is slightly different (see the Tasks section on page 42 for more information).

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

				Project Category	Normal	
☐	Project ID	Project Name	Company	Created By	Created	Keywords
☐	p4674541	Copy of Car Survey (Optimized)	Confirmit	Apple, Adam	08/01/2010 08:52:47	
☐	p4603473	Poll survey	Confirmit	Apple, Adam	05/01/2010 10:57:58	
☐	p3614852	Satisfaction Project (Legacy)	Confirmit	Apple, Adam	02/12/2009 14:25:41	
☐	p3613394	Legacy project	Confirmit	Apple, Adam	02/12/2009 14:24:27	
☐	p2795220	Another Car Survey	Confirmit	Apple, Adam	05/11/2009 09:31:41	
☐	p2661497	Car Survey (Optimized)	Confirmit	Apple, Adam	02/11/2009 11:50:05	
☐	p2660848	Newspaper Survey for CAPI - Optimiz	Confirmit	Apple, Adam	02/11/2009 11:49:25	
☐	p1892737	Getting Started Reportal - Optimiz	Confirmit	Apple, Adam	02/09/2009 14:02:29	
☐	p1117589	Hierarchv	Confirmit	Apple, Adam	31/07/2009 10:29:44	

Figure 33 Example of a Search list

The fields across the top of the list allow you to search by Project ID, Project Name, owner Company, Creator of the survey, by report creation date in "Created", and by Keywords.

When searching, a wildcard is automatically added after the text you enter, but not before. In the example below, a wildcard has been added before the search string, so all surveys with the string in the name have been returned. If the wildcard had not been added only Car Survey (Optimized) would have been found as this is the only survey in the list where the name starts with "Car".

				Project Category	Normal	
☐	Project ID	Project Name	Company	Created By	Created	Keywords
☐		*car				
☐	p4674541	Copy of Car Survey (Optimized)	Confirmit	Apple, Adam	08/01/2010 08:52:47	
☐	p2795220	Another Car Survey	Confirmit	Apple, Adam	05/11/2009 09:31:41	
☐	p2661497	Car Survey (Optimized)	Confirmit	Apple, Adam	02/11/2009 11:50:05	

Figure 34 Example of the results of a specific search

- 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 Project ID link to go to open that survey and go to its Overview page. If you move the mouse pointer over a Project ID link and click on the drop-down button that appears to the right of the link, the survey menu will be displayed. **Project Overview** opens the Project Overview page, **Project Designer** opens the Project 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 "Project ID."
- You can also move several projects simultaneously to the Favorite projects lists. To do this, check the check-box next to the desired surveys and click **Add to Favorites**. To select all, check the checkbox at the top of the list, next to "Project 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 Project 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.
 - o The surveys that are marked with category Library will usually be surveys that you wish to keep for later reference.

- o 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.

3.12. 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 of if not required (see the Survey Layout Component Properties section on page 62 for more information).
- The button tabbing order is set such that the **Forward** (next question) button is always the first to be highlighted (see the Survey Layout Component Properties section on page 62 for more information).
- The question title, question text and question instruction texts can be included in the legend (see the Visual Components for Question Skins section on page 69 for more information).



Figure 35 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 projects using the Accessible mode (see the Features Not Supported in Accessible Mode section on page 35 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 the Controlling and Switching Between Modes section on page 35 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.

3.12.1. How to Activate the Accessibility Functionality

To activate the Accessibility functionality in a theme, you must designate it as "Accessibility enabled". To do this:

1. Go to the Layouts and Themes toolbox.
2. Right-click on the theme in the toolbox to open the drop-down menu.
3. Select **Toggle Accessibility Mode**.

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

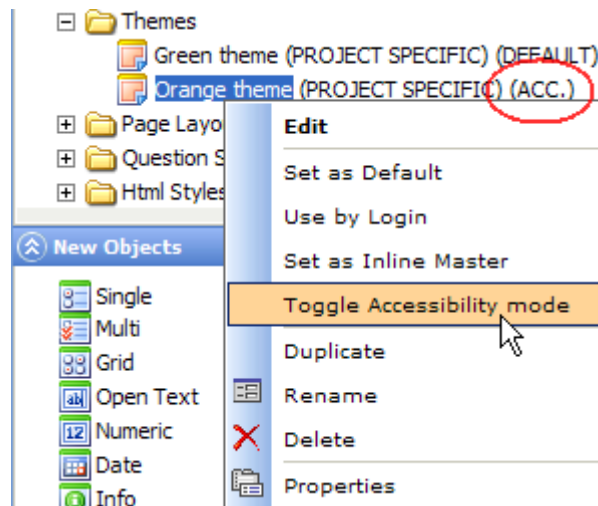


Figure 36 *Toggling the Accessibility mode*

Note that you can also go to the theme properties and check the Accessibility Enabled Theme property (see the Theme Properties section on page 64 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 the Survey Layout Component Properties section on page 62 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.

3.12.2. Controlling and Switching Between Modes

If your project 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 the Use of Background Variables section on page 385 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.

3.12.3. 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 project, if one or more of the themes in the project are set to Accessible, then warnings will be displayed when the project is launched. This is to bring to your attention the fact that the project 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
- Scale groups
- Repeating headers
- Bottom headers
- Show scale bars
- Right-texts for grids
- 3d grids

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.

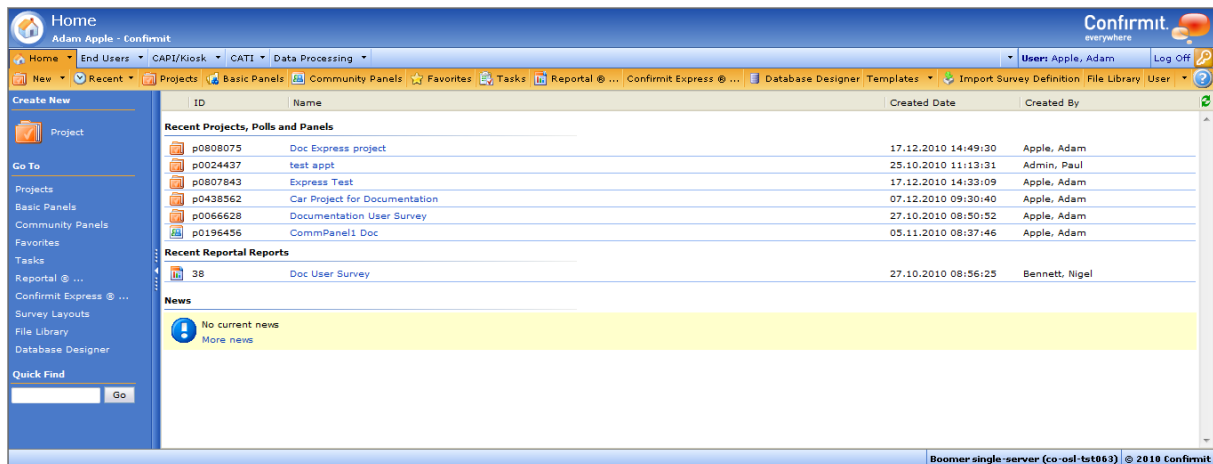


Figure 37 Example of a Professional user's Home page

Standard users are presented with a simplified GUI.

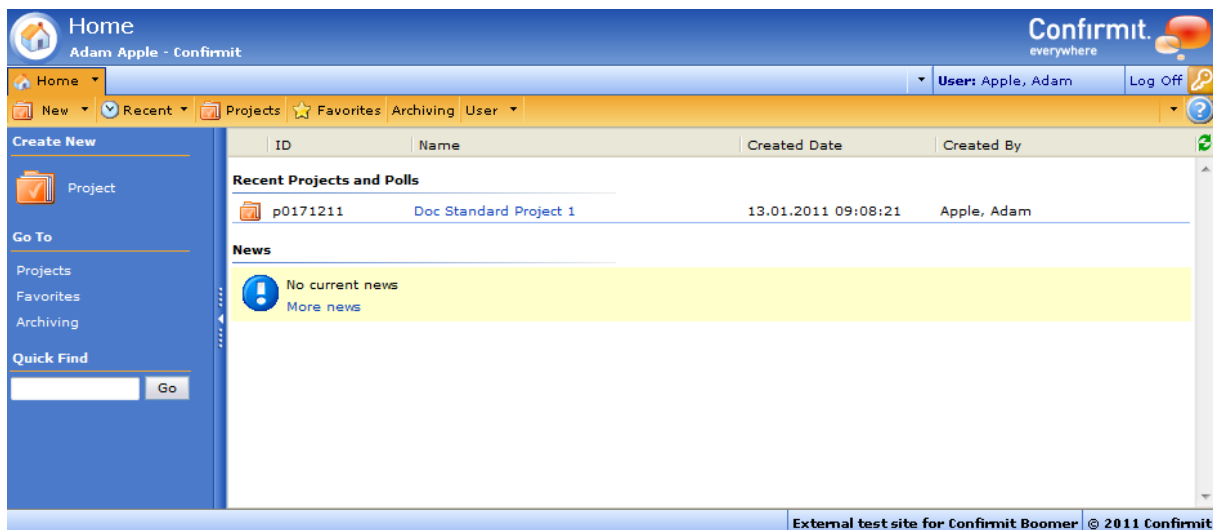


Figure 38 Example of a Standard user's Home page

- The 10 last projects with which you have been working are displayed under **Recent Projects 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 projects, Basic Panels, Community Panels, 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.

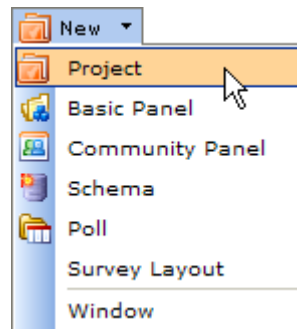


Figure 39 The New menu

You can also create new projects by clicking the **Project** button in the Quick Access pane.

4.3. Recent

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

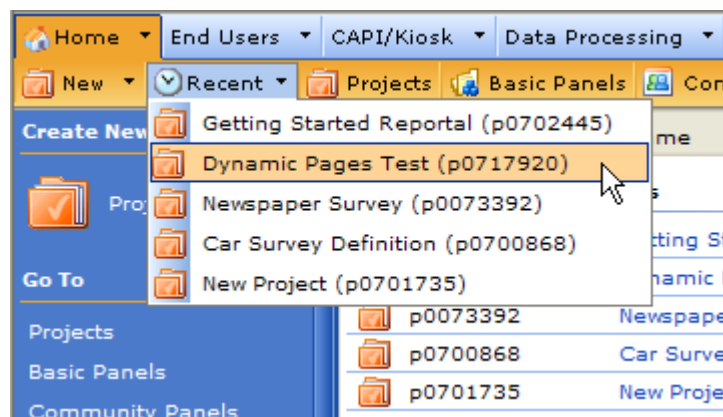


Figure 40 Example of the Recent menu

4.4. Projects

Go to **Home > Projects** to display a list of your projects and the projects to which you have been granted access by other Confirmit users. Click the blue **Project ID** link for the desired item to open it (see the Search Lists section on page 32 for more information).

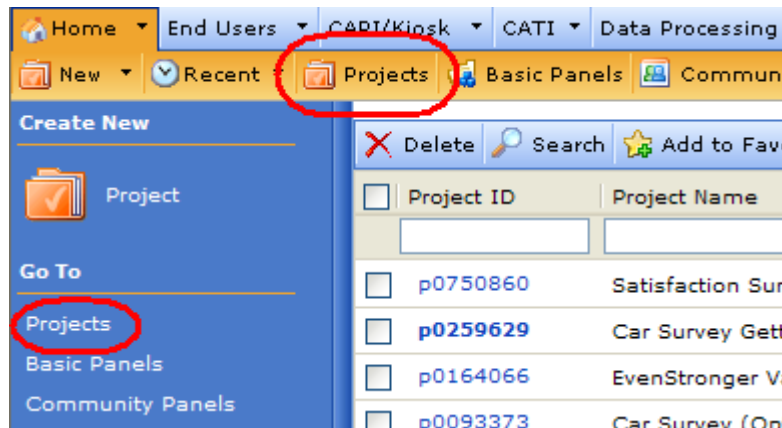


Figure 41 The Home > Projects page

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 the Basic Panels section on page 421 for more information).

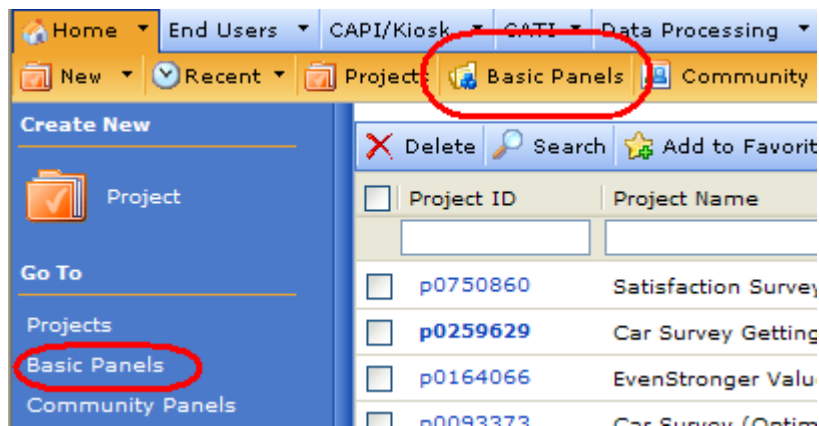


Figure 42 The Home > Basic Panels menu commands

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

4.6. Community Panels

Note: Community 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 > Community 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 Community Panels, refer to the separate Community Panels documentation.

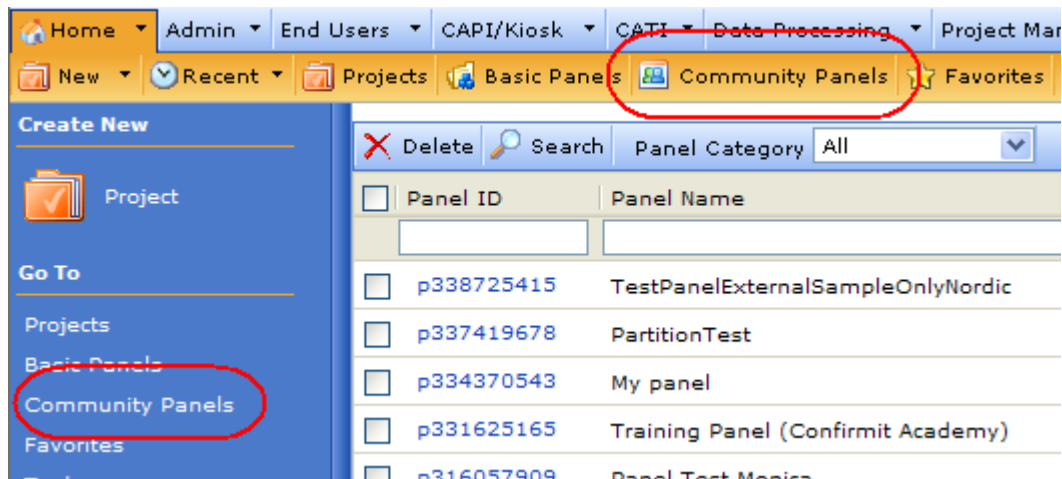


Figure 43 Example of the Home > Community Panels page

4.7. Favorites

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

1. Go to the Project list.
2. Right-click on the project and select **Add to Favorites** from the menu (see the Search Lists section on page 32 for more information).

Or

3. Click on the check box beside the project you wish to add to the Favorites list to select it.
4. Click **Add to Favorites**.

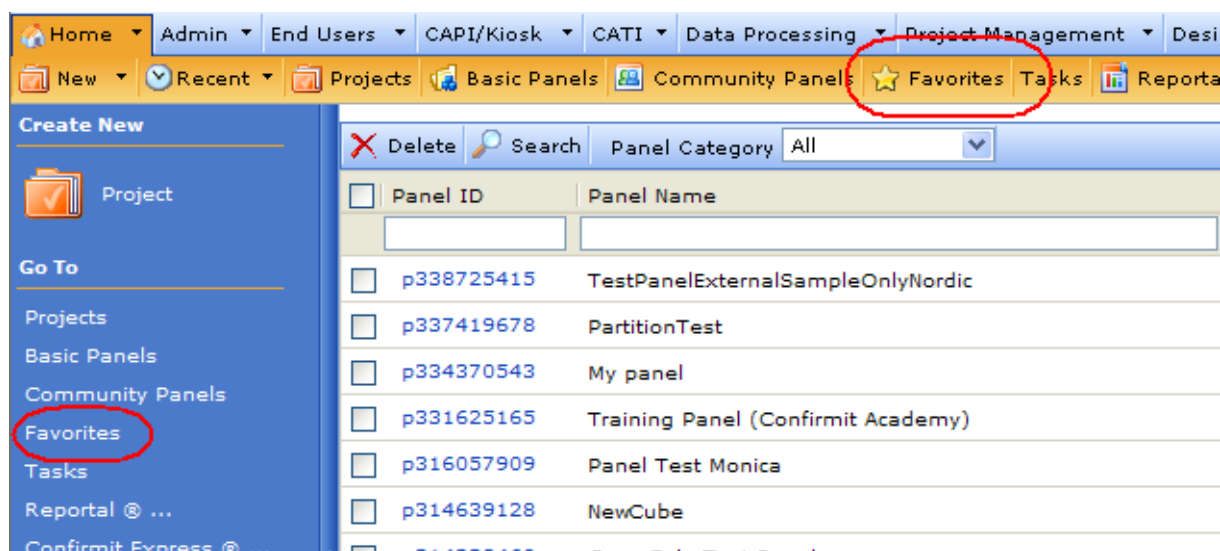


Figure 44 Selecting the Home > Favorites page

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

4.8. Archiving

The Archiving functionality allows On-Premise users who have the System Administrator permission to store projects that are inactive.

Note: This functionality is only available to On-Premise customers.

Note: The 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.

For On-Premise customers, the system administrator can specify after how many days without any activity a project is to be archived. The system administrator can also specify how many days prior to archiving the project administrator is to be notified by the system via email.

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.

Go to the **Home > Archiving** menu command to display a list of the projects.

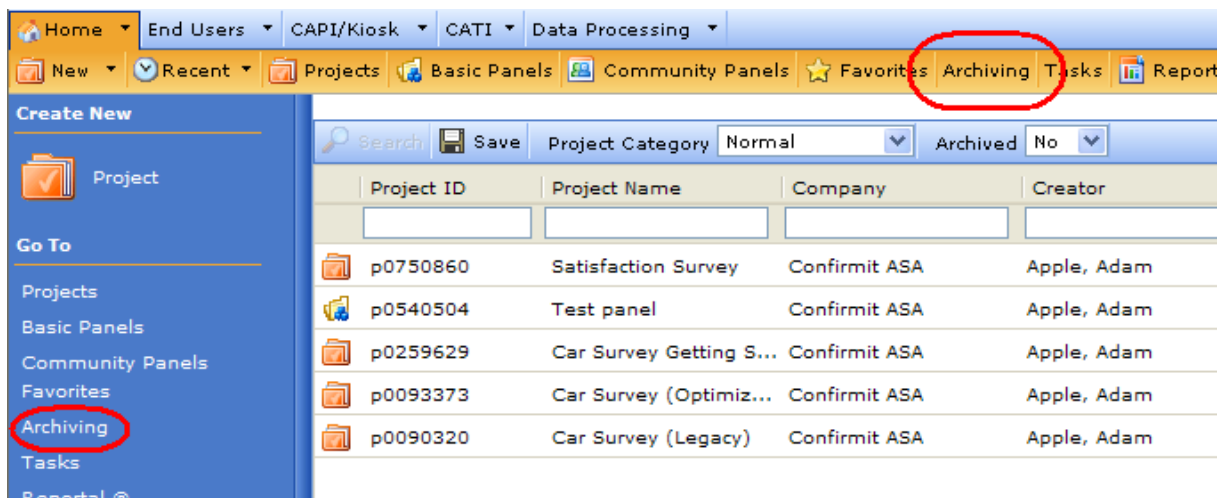


Figure 45 Accessing the Archiving list

You can view projects to which you have at least *Read* permission. Users who have only *Read* permission are not able to modify any data in the Archiving list. The search functionality in this list is similar to that for the project list.

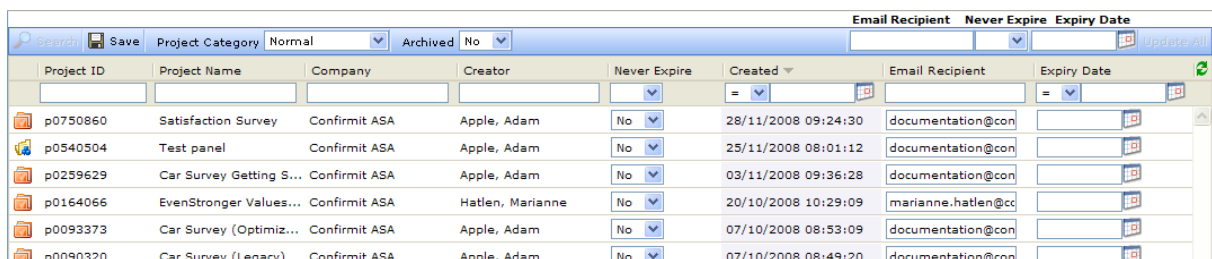


Figure 46 Example of the Survey List as displayed by the Archiving functionality

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

To archive a project:

1. In the Archive Project list, find the relevant project.
2. Set the Expiry Date to the date on which you wish the project to be archived.
3. Click **Save** to save the changes.

For further details, refer to the Confirmit Administrator manual.

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

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.

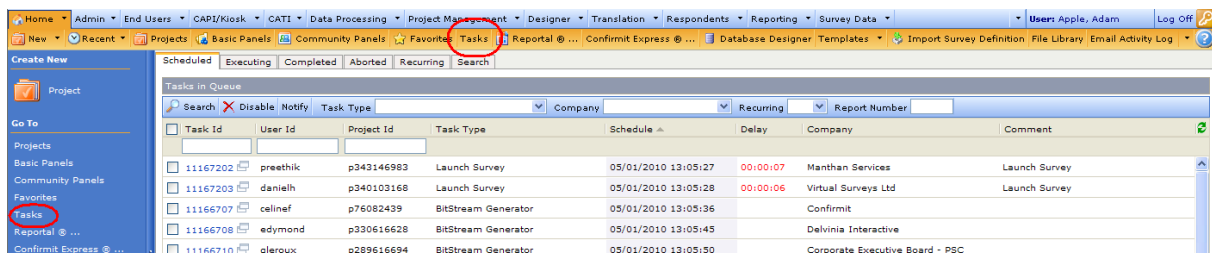


Figure 47 Opening the Tasks page

The Tasks page has six tabs:

- **Scheduled** – A list of the user's pending tasks (see the The Tasks Scheduled Tab section on page 43 for more information).
- **Executing** – Task currently being run on the batch server (see the The Tasks Executing Tab section on page 43 for more information).
- **Completed** – Tasks that did finish within the specified timeframe (see the The Tasks Completed Tab section on page 44 for more information).
- **Aborted** – Tasks that for some reason did not finish within the specified timeframe (see the The Aborted Tasks Tab section on page 44 for more information).
- **Recurring** – Tasks that have been scheduled to recur at specified time intervals (see the The Recurring Tasks Tab section on page 44 for more information).
- **Search** – Here you can search for your batch job to check its status (see the Searching in the Task Pane section on page 45 for more information).

Click on the **Task ID** number in a list to go to the Task Properties overview (see the The Task Properties Page section on page 46 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 The Task Properties Recurrence Tab section on page 47 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 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, ask your Confirmit administrator to adjust the time limitation.

On-Demand only:

Contact CONFIRMIT Professional Services for assistance: support@confirmit.com

- You can disable a task while it is being executed (see the How to Disable a Scheduled Task section on page 46 for more information).
- You can be notified by a popup message on your screen when a task is completed (see the Be Notified when a Task is Completed section on page 46 for more information).

- Confirmit users who have Administrator permission to a project will be able to see and search for all batch tasks that have been set up for this project.

A **Project Tasks** link is displayed at the bottom of the **General** tab under **Project Management > Overview**. Click the link to go to the Task Management page. Here are listed all batch tasks for the current project. When searching for tasks in Task Management, you must always specify the project number in the Project 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 projects 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.

Task Id	User Id	Project Id	Task Type	Schedule	Delay	Company	Comment
27852	peterj_pros	p0430350	Rule Set Executor	10/02/2010 13:06:57		Confirmit	recurring BS rule set
27866	larsk_admin		Process Transaction Log Cube	10/02/2010 13:53:06		Confirmit	
28010	wasimt	p1641545	EnterprisePanel - SurveyRuleExecutor	12/02/2010 12:00:00		Confirmit	
27741	sinrh	p0719339	Rule Set Executor	15/02/2010 10:44:10		Confirmit	
27015	peterj_pros	p0430350	Rule Executor	01/03/2010 02:00:00		Confirmit	Populate snapshot DB
27719	peterj_pros	p0430350	Create and Process Cube	01/03/2010 03:00:00		Confirmit	Process OLAP cube

Figure 48 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 the Searching in the Task Pane section on page 45 for more information). Click **Reset** to remove all input search criteria and display the full list.
- You can disable an unwanted task (see the How to Disable a Scheduled Task section on page 46 for more information).
- You can be notified by a message popup on your screen when a task is completed (see the Be Notified when a Task is Completed section on page 46 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.

Task Id	User Id	Project Id	Task Type	Schedule	Start Time	Elapsed	Company	Server	Comment
No items available									

Figure 49 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 the Searching in the Task Pane section on page 45 for more information). Click **Reset** to remove all input search criteria and display the full list.
- You can Abort an unwanted task (see the The Aborted Tasks Tab section on page 44 for more information).
- You can be notified by a message popup on your screen when a task is completed (see the Be Notified when a Task is Completed section on page 46 for more information).

4.9.3. The Tasks Completed Tab

This tab lists all the tasks that have been completed.

Task Id	User Id	Project Id	Task Type	Schedule	Start Time	Duration	Company	Server	Comment
28031	davidw		Survey Import	10/02/2010 11:08:24	10/02/2010 11:08:27	00:00:01	Confirmit	VM247	
28029	ElenaT	p5440989	Launch Survey	10/02/2010 11:07:36	10/02/2010 11:07:41	00:00:07	Confirmit	VM247	Launch Survey
28028	SergeyB	p4565809	Respondent Bulk Upload	10/02/2010 11:02:36	10/02/2010 11:02:40	00:00:13	Confirmit	VM247	
28026	ElenaK_pros	p5441256	Launch Survey	10/02/2010 10:59:33	10/02/2010 10:59:37	00:00:17	Confirmit	VM246	Launch Survey
28024	oyvindt_pros	p2423935	Launch Survey	10/02/2010 10:58:50	10/02/2010 10:58:57	00:00:24	Confirmit	VM247	Launch Survey
28023	PolinaF_pros	p5441135	Respondent Bulk Upload	10/02/2010 10:58:45	10/02/2010 10:58:50	00:00:28	pfv_test2	VM247	
28021	PolinaF_pros	p5441135	Launch Survey	10/02/2010 10:57:59	10/02/2010 10:58:03	00:00:20	pfv_test2	VM246	Launch Survey

Figure 50 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 the Searching in the Task Pane section on page 45 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.

Task Id	User Id	Project Id	Task Type	Schedule	Start Time	Duration	Company	Server	Last log entry
28036	ElenaT	p5440989	Respondent Bulk Upload	10/02/2010 11:10:21	10/02/2010 11:10:26	00:00:12	Confirmit	VM247	Added to pending fusion sync table
28033	davidw	p5443510	Respondent Bulk Upload	10/02/2010 11:09:39	10/02/2010 11:09:44	00:00:12	Confirmit	VM247	Added to pending fusion sync table
28030	ElenaT	p5440989	Respondent Bulk Upload	10/02/2010 11:08:06	10/02/2010 11:08:06	00:00:12	Confirmit	VM247	Added to pending fusion sync table
28027	SergeyB	p4579422	Respondent Bulk Upload	10/02/2010 10:59:57	10/02/2010 10:59:59	00:00:12	Confirmit	VM247	Added to pending fusion sync table
28025	SergeyB	p4579422	Respondent Bulk Upload	10/02/2010 10:59:30	10/02/2010 10:59:32	00:00:01	Confirmit	VM247	File validation failed
28022	ElenaK_pros	p5441256	Launch Survey	10/02/2010 10:58:38	10/02/2010 10:58:39	00:00:13	Confirmit	VM247	Internal Server Error - Please contact
28020	SergeyB	p4579422	Respondent Bulk Upload	10/02/2010 10:57:53	10/02/2010 10:57:53	00:00:02	Confirmit	VM247	The following background-variable co
28017	davidw	p5441221	Respondent Bulk Upload	10/02/2010 10:45:25	10/02/2010 10:45:28	00:00:12	Confirmit	VM247	Added to pending fusion sync table
28015	wasimt	p1641545	EnterprisePanel - SurveyRuleExecutor	10/02/2010 10:40:09	10/02/2010 10:40:14	00:00:09	Confirmit	VM246	Task instance aborted by user

Figure 51 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 the Searching in the Task Pane section on page 45 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 the How to Change the Task Owner section on page 50 for more information).

4.9.5. The Recurring Tasks Tab

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

Scheduled	Executing	Completed	Aborted	Recurring	Search

Recurring tasks from the last 30 days							
			Task Type	Company	Report Number		
Def. Id	User Id	Project Id	Task Type	Schedule	Recurrence	Company	Comment
20915	peterj_pros	p0430350	Rule Set Executor	10/02/2010 13:06:57	Daily	Confirmit	recurring BS rule set
15684	larsk_admin		Process Transaction Log Cube	10/02/2010 13:53:06	Daily	Confirmit	
17021	sirih	p0719339	Rule Set Executor	15/02/2010 10:44:10	Weekly	Confirmit	
3537	peterj_pros	p0430350	Rule Executor	01/03/2010 02:00:00	Monthly	Confirmit	Populate snapshot DB
3550	peterj_pros	p0430350	Create and Process Cube	01/03/2010 03:00:00	Monthly	Confirmit	Process OLAP cube
16556	wasimt	p3726837	Rule Executor	01/03/2010 11:27:40	Monthly	Confirmit	
17591	wasimt	p3726837	Rule Executor	01/03/2010 17:04:46	Monthly	Confirmit	

Figure 52 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 The Task Properties Page section on page 46 for more information)
- You can Disable an unwanted task (see the How to Disable a Scheduled Task section on page 46 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 the Searching in the Task Pane section on page 45 for more information). Click **Reset** to remove all input search criteria and display the full list.

4.9.6. Searching in the Task Pane

The Search tab lists all the tasks that are associated with the projects that you have access to (see the figure below for an example). 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.

The search parameters are:

- **Task type** - SPSS Export, MS Word Export, MS Office Export (PPT/Excel), Data Export, Batch Emailing, Publisher, Survey Export, Survey Import, Data Import, Sampling, Rulebased Send out, DB Generator, WI Generator, Archiving, Respondent Uploading, Project Info Collector, Project Info Exporter, Multitask, 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.
- **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.

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.

Task Id	User Id	Project Id	Task Type	Schedule	Status	Company	Server	Comment
27107	wasimt	p3726837	Rule Executor	01/03/2010 17:04:46	In Queue	Confirmit		
27026	wasimt	p3726837	Rule Executor	01/03/2010 11:27:40	In Queue	Confirmit		
27019	peterj_pros	p0430350	Create and Process Cube	01/03/2010 03:00:00	In Queue	Confirmit		Process OLAP cube
27015	peterj_pros	p0430350	Rule Executor	01/03/2010 02:00:00	In Queue	Confirmit		Populate snapshot DB
27741	sinrh	p0719339	Rule Set Executor	15/02/2010 10:44:10	In Queue	Confirmit		
28010	wasimt	p1641545	EnterprisePanel - SurveyRuleExecutor	12/02/2010 12:00:00	In Queue	Confirmit		
27866	larsk_admin		Process Transaction Log Cube	10/02/2010 13:53:06	In Queue	Confirmit		

Figure 53 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 check-box 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 check-box 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.

Tasks completed in the last 30 days

Launch Survey

Definition Recurrence Parameters Instances

Task Type Launch Survey

ID 3675770

Owner nigel

Company Confirmit

Project ID p645821998

Comment Launch Survey

Command Line

Save Run task

Figure 54 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.

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 55 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 56 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 project is closed, any recurring tasks still running for that project 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.

The screenshot shows the 'Launch Survey' dialog box with the 'Recurrence' tab selected. The 'Recurrence parameters saved' section displays the following information:

Current Settings	
Initial Start Time:	10.05.2011 12:00:00
Pattern:	Daily
Interval:	Every 2 day(s)
Range:	01.06.2011

Below this, the 'Next scheduled occurrences' are listed:

- 10.05.2011 12:00:00
- 12.05.2011 12:00:00
- 14.05.2011 12:00:00
- 16.05.2011 12:00:00
- 18.05.2011 12:00:00

A 'Change' button is located at the bottom of the dialog.

Figure 57 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.

tasks completed in the last 30 days

Launch Survey	
Definition	Recurrence
ConvertToOptimized	0
database	0
dbgenerated	1
deleteold	1
EnforceVersion	0
ExternalQuickTest	0
ExternalTestEnabled	0
GenerateDbOption	CreateNewDatabase
GenerateWiOption	WiNet
rebuild	0
Tasktype	Firmglobal.Confirmat.Tasks.SurveyEngine.LaunchSurvey
UseManagedLegacyDbGeneration	1
wigenerated	

Figure 58 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.

tasks completed in the last 30 days

Launch Survey	
Definition	Recurrence

08.04.2011 09:33:05  Complete



Launch Survey

0%

25%

50%

75%

100%

Task Id: 17398309
 Status: **Complete**
 Assigned server: 273794-UK-BAT02
 Schedule: 08.04.2011 09:33:05
 Start Time: 08.04.2011 09:33:14
 End Time: 08.04.2011 09:33:38
 Elapsed Time: 00:00:24

(9:33:14 AM) Initiating task: Launch Survey
 (9:33:20 AM) Generating DB...
 (9:33:25 AM) Updating system tables...
 (9:33:29 AM) Upgrading database...
 (9:33:31 AM) - Changes to the internal storage fields:
 (9:33:31 AM) Added: 1, Updated: 0, Moved: 0
 (9:33:31 AM) Generating WI.Net...
 (9:33:32 AM) Reading survey schema...
 (9:33:33 AM) Parsing...
 (9:33:33 AM) Question limit: None
 (9:33:33 AM) Building layout...
 (9:33:34 AM) Generating code...
 (9:33:35 AM) Compiling code...
 (9:33:36 AM) Checking compiler results...
 (9:33:36 AM) Generating survey package...
 (9:33:37 AM) Deploying web files...

Figure 59 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.

The screenshot shows a web application window titled 'Launch Survey'. It has a sidebar on the left with a search icon and a list of tasks. The main content area has a tabbed interface with four tabs: 'Definition' (selected), 'Recurrence', 'Parameters', and 'Instances'. The 'Definition' tab contains the following fields:

- Task Type:** Launch Survey
- ID:** 3675770
- Owner:** nigel (text input field)
- Company:** Confirmit
- Project ID:** p645821998
- Comment:** Launch Survey (text input field)
- Command Line:** (empty text input field)

At the bottom of the form are two buttons: 'Save' and 'Run task'.

Figure 60 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. Two 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.

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

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: `<img ... />` and `<br />`.
- 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 Confirmit Authoring (see the The Accessibility Functionality section on page 34 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 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 project level. Any changes you make at this level will be specific to the project 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**.

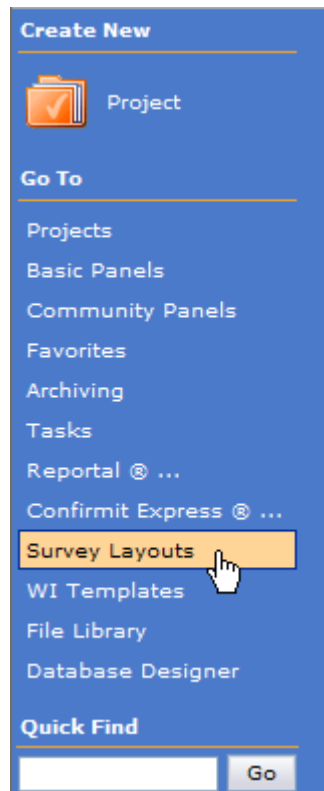


Figure 61 Choose Survey Layouts on the Quick Access Pane

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 project. You are then taken directly to the edit mode of the survey layout used by the active project.

☐ Delete Search Reset Import Survey Layout New Survey Layout			
☐ Name	Company	Created By	Created
☐ Express Survey Layout - A - Claret	Confirmit	Admin, Monica	04/01/2010 11:05:24
☐ Express Survey Layout - A - Buttercup	Confirmit	Admin, Monica	04/01/2010 11:03:26
☐ Express Survey Layout - C - Mushroom	Confirmit	Admin, Monica	04/01/2010 10:59:46
☐ Express Survey Layout - C - Charlie Chaplin	Confirmit	Admin, Monica	04/01/2010 10:58:55
☐ Express Survey Layout - C - Custard	Confirmit	Admin, Monica	04/01/2010 10:56:57
☐ Express Survey Layout - C - Strawberry Ice-Cream	Confirmit	Admin, Monica	04/01/2010 10:52:06
☐ Express Survey Layout - A - Claret	Confirmit	Wyrwinski, Lukasz	28/12/2009 13:47:30
☐ Express Survey Layout - A - Buttercup	Confirmit	Wyrwinski, Lukasz	28/12/2009 13:45:52
☐ Express Survey Layout - C - Mushroom	Confirmit	Wyrwinski, Lukasz	28/12/2009 13:44:40

Figure 62 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, Express and Company Specific checkbox settings for the layouts listed.

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

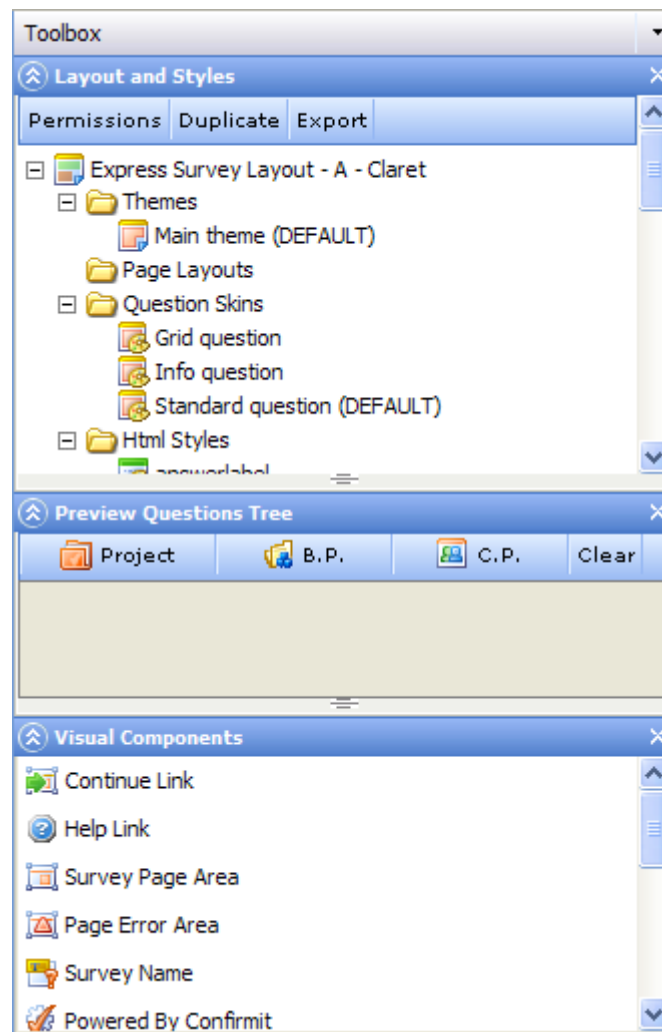


Figure 63 The Toolbox layout for a Global Survey Layout

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 project.

When a project is open, you can specify a survey layout for the project by going to the **Layout** tab under the **Designer > Survey Settings** menu command (see the Survey Settings section on page 353 for more information).

If you are creating a new project, 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.

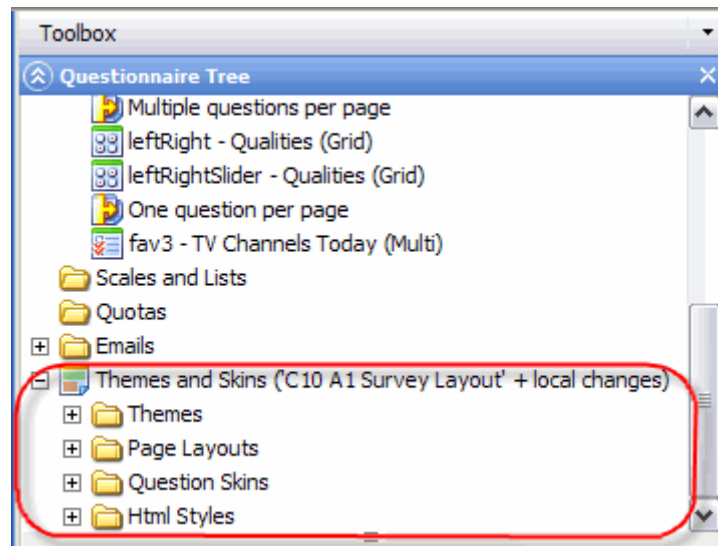


Figure 64 Direct access to Survey Layouts via the Questionnaire Tree

Confirmit indicates next to the **Themes and Skins** folder which global Survey Layout is currently used for the project (see the figure above). Additions and changes done here are all project-specific, meaning that no other projects 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**.

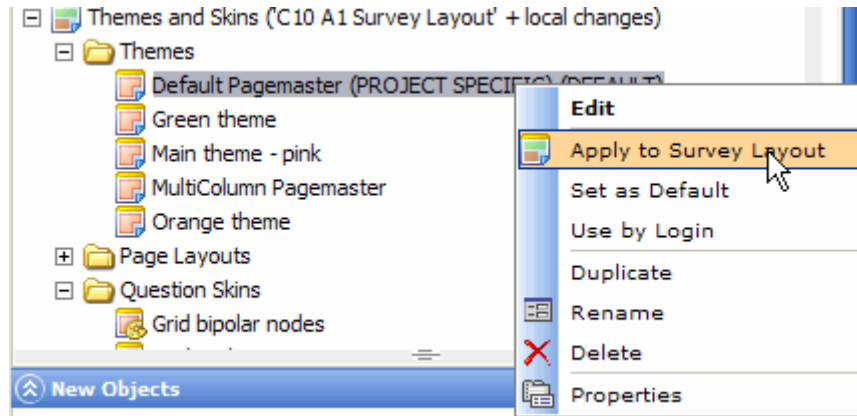


Figure 65 Applying a project-specific layout to Survey Layout

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 project-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 project 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 66 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 the How to Create an Easy Layout section on page 97 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.

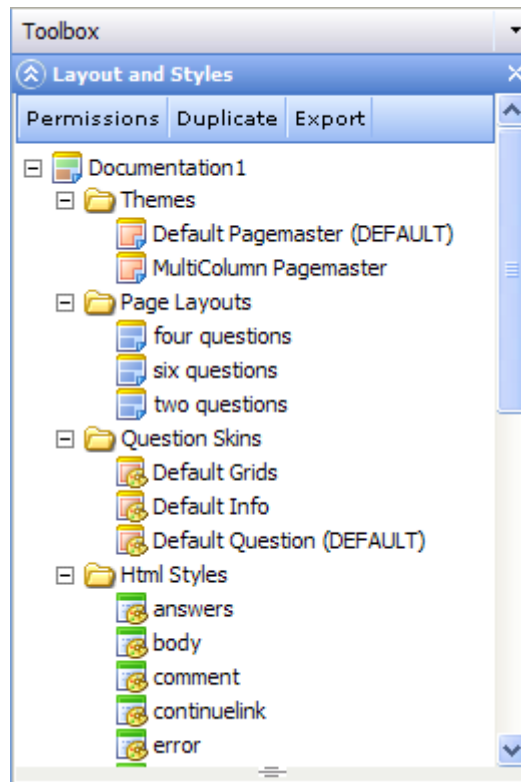


Figure 67 The Layout and Styles toolbox containing your new survey layout

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.

Once the survey layout is as you require, you can set the access permissions for it for the other users in your company (see the Global Survey Layout Permissions section on page 57 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 68 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 the Poll Projects section on page 249 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.
- **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. On-Demand users are therefore not allowed to make a layout Public because the layout would then be available to all On-Demand users (all Confirmit's On-Demand 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.

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. Working with Survey Layouts

In the following example an HTML table has been used to determine the visual components' positions on the page. 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 the Greater Accessibility section on page 51 for more information).

For more information on working with HTML tables on a page, see the Confirmit Reportal Manual. Note that all Confirmit User Manuals can be downloaded free of charge from the Confirmit Extranet at any time.

4.10.5.1. 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 The Accessibility Functionality section on page 34 for more information) or a checkbox on the theme property page (see the Theme Properties section on page 64 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 The Web Options Tab Properties section on page 356 for more information).

4.10.5.1.1. 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.

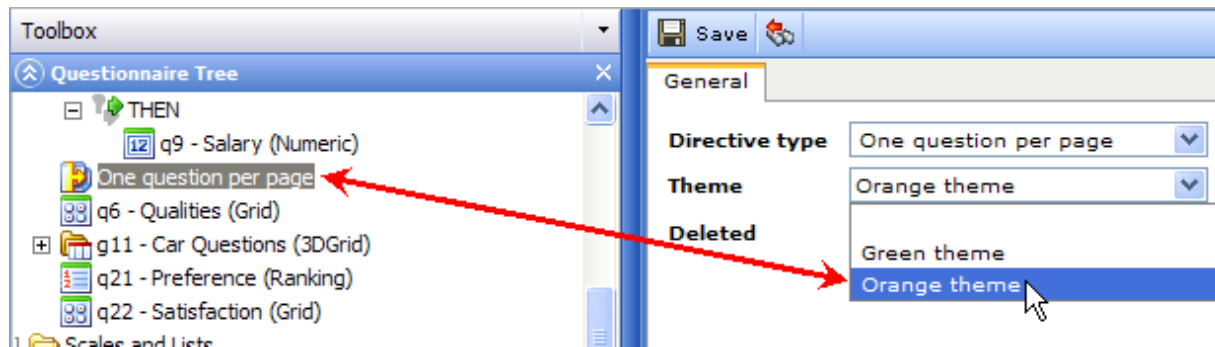


Figure 69 You can select the theme to be used by setting it on Directives and Page objects

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.

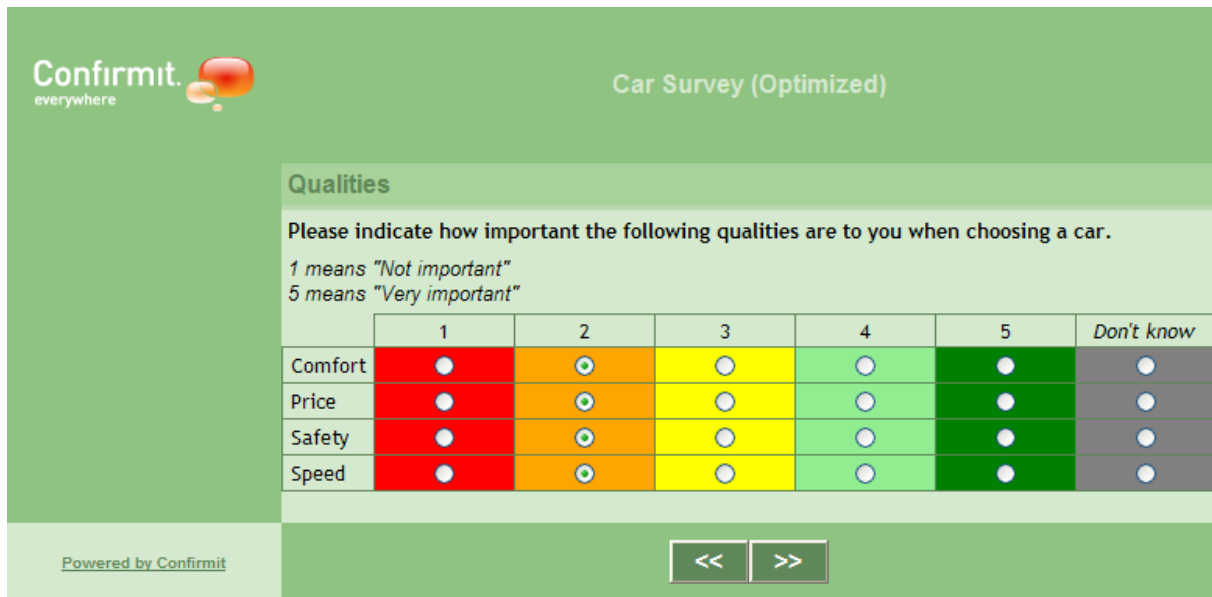
The screenshot shows the 'Qualities' grid question in the 'Orange' theme. The question asks the user to indicate how important various qualities are when choosing a car, with a rating scale from 1 (Not important) to 5 (Very important). The grid is as follows:

	1	2	3	4	5	Don't know
Comfort	☐	☐	☐	☐	☐	☐
Price	☐	☐	☐	☐	☐	☐
Safety	☐	☐	☐	☐	☐	☐
Speed	☐	☐	☐	☐	☐	☐

The grid is presented with the 'Orange' theme, which includes a yellow background and orange text. The 'Qualities' section is highlighted in orange. The 'Please indicate how important the following qualities are to you when choosing a car.' instruction is in orange. The '1 means "Not important"' and '5 means "Very important"' instructions are in orange. The grid is presented with the 'Orange' theme, which includes a yellow background and orange text. The 'Qualities' section is highlighted in orange. The 'Please indicate how important the following qualities are to you when choosing a car.' instruction is in orange. The '1 means "Not important"' and '5 means "Very important"' instructions are in orange.

Figure 70 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.



Qualities

Please indicate how important the following qualities are to you when choosing a car.

1 means "Not important"
5 means "Very important"

	1	2	3	4	5	Don't know
Comfort	☐	☐	☐	☐	☐	☐
Price	☐	☐	☐	☐	☐	☐
Safety	☐	☐	☐	☐	☐	☐
Speed	☐	☐	☐	☐	☐	☐

Powered by Confirmit

Figure 71 The same grid question using the "Green" theme

4.10.5.1.2. 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.

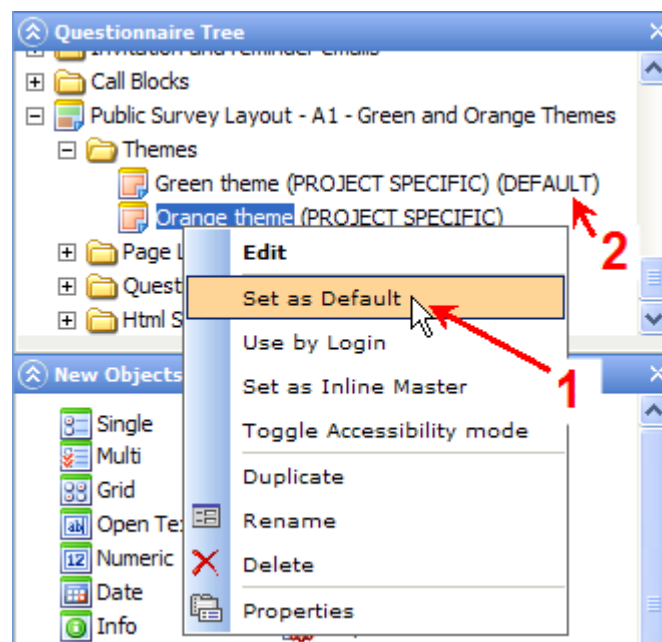


Figure 72 Setting a theme as Default

4.10.5.1.3. 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.
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.

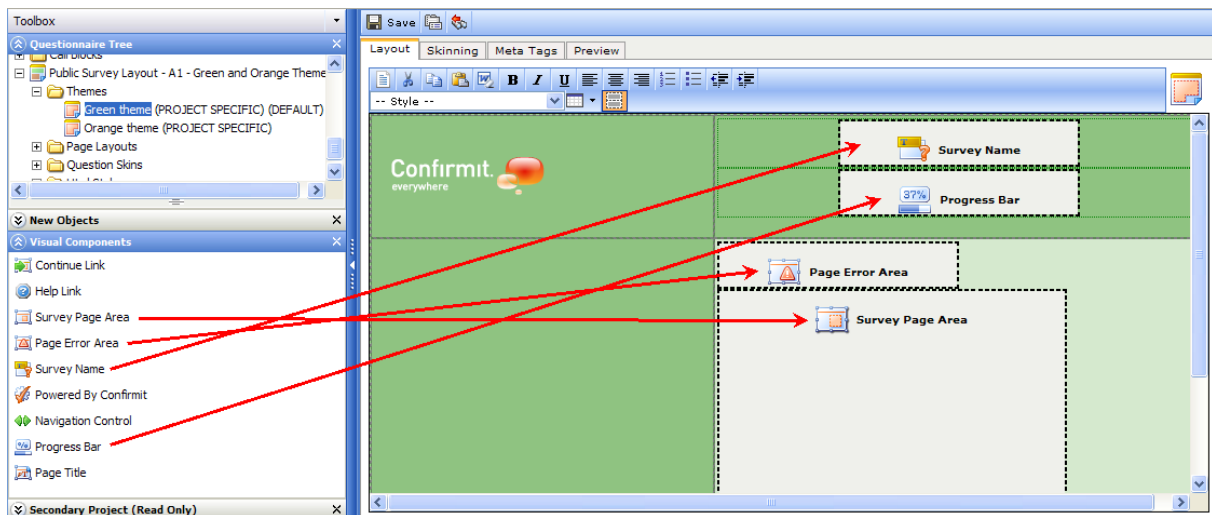


Figure 73 Editing a Theme

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 **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.

4.10.5.1.4. 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.

4.10.5.1.5. Survey Layout Component Properties

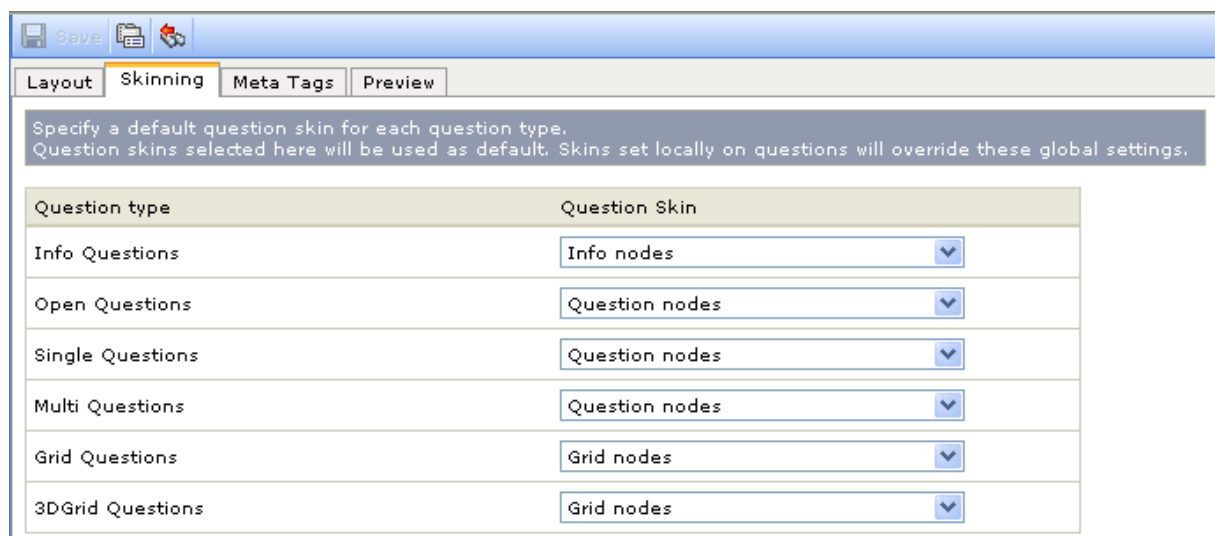
Each of the visual components used in the survey layout has a Properties page. To access this page, right-click on the component in the Layout tab and select **Properties**. The properties available depend on the component selected. The main properties are described below (note that some properties are 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 The Accessibility Functionality section on page 34 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 The Accessibility Functionality section on page 34 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).

4.10.5.1.6. 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.



Question type	Question Skin
Info Questions	Info nodes
Open Questions	Question nodes
Single Questions	Question nodes
Multi Questions	Question nodes
Grid Questions	Grid nodes
3DGrid Questions	Grid nodes

Figure 74 Example of the Skinning tab

4.10.5.1.7. 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.

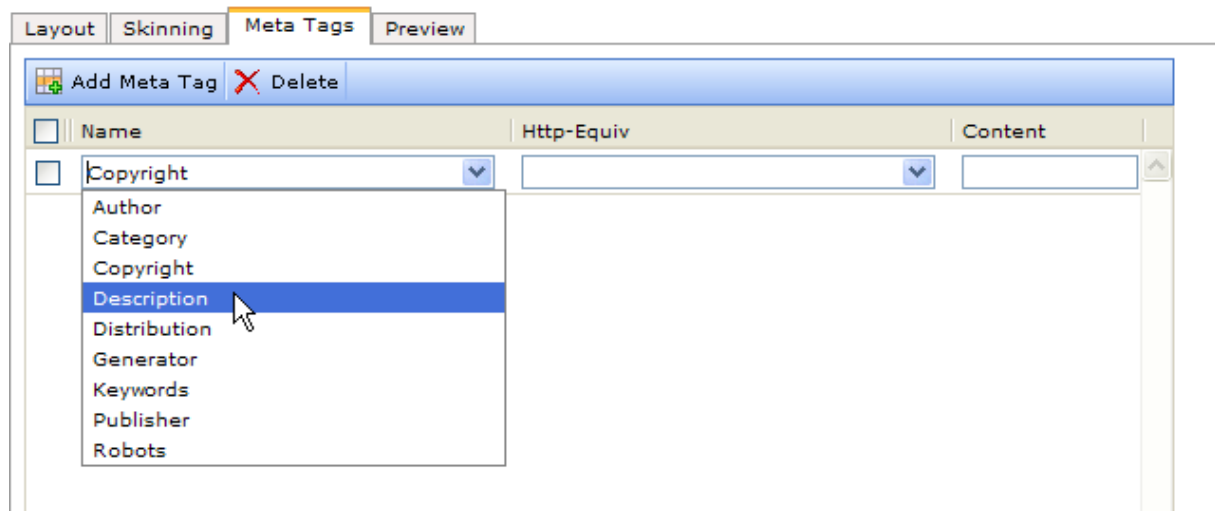


Figure 75 Example of the Meta Tag tab

- **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.

4.10.5.1.8. 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.

Properties	
SurveyPageMasterSheet -	
Document Type	XHTML 1.0 Transitional
External Stylesheet Url	
External Javascript Url	
Title Text	
Body Style Name	body
Body Attributes	link="#60875A" vlink="#60875A"
Page Area Columns	
Vertical Column Population	☐
Default 'Powered By Confirmit' Style	poweredby
Suppress hidden THEAD tags	☐
Accessibility enabled theme	☐

Figure 76 Example of a Theme's Properties page

- **Document Type** – choose a standard for the document type.
- **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 the Using an External Style Sheet section on page 65 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 The Accessibility Functionality section on page 34 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 the How to Activate the Accessibility Functionality section on page 34 for more information)

4.10.5.1.9. 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 or 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.

4.10.5.1.10. 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 the HTML Styles section on page 83 for more information). The system checks all the style sheets available within the project, 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 project where the style sheet is located, and "connect" the style sheet to the project:

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 the Theme Properties section on page 64 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 project 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.

```
align="center"><confirmit:wysiwygcomponent type="ProgressBar" id="(0:0-195384477#469615641, 677)" /></div></td></tr><tr><td style="background-color: #8fc381" valign="bottom" align="center" bgcolor="#8fc381"><p class="text">A piece of text</p></td><td style="background-color: #d5e9ce" valign="top" align="left" bgcolor="#d5e9ce"><confirmit:wysiwygcomponent type="PageError" id="(0:0-195384479#469615653, 681)" /></td></tr><tr><td style="height: 50px; background-color: #d5e9ce" valign="middle" align="center" bgcolor="#d5e9ce" height="50"><confirmit:wysiwygcomponent type="PoweredBy" id="(0:0-195384482#469615663, 679)" /></td><td
```

Figure 77 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).

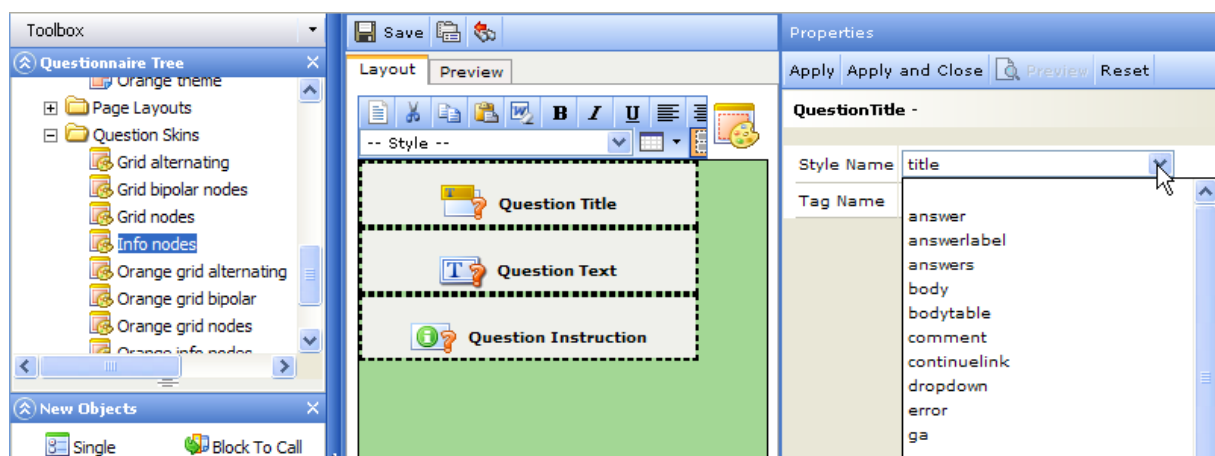


Figure 78 Selecting a style for the Info nodes question skin

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

4.10.5.2. 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 section on page 220 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 projects 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.

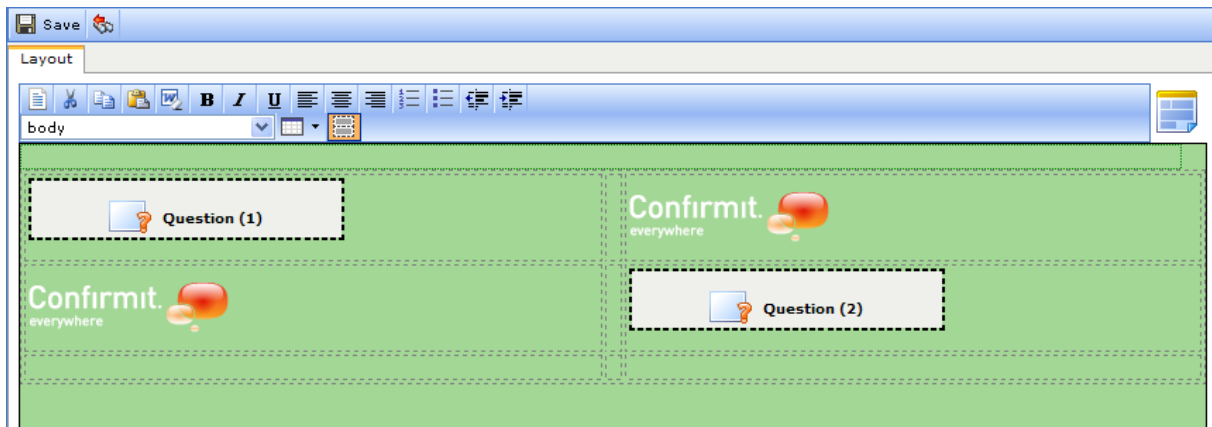


Figure 79 Example of the Page Layout

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.

4.10.5.3. 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 the How to Set the Default Skin section on page 67 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 The General Tab section on page 184 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 the HTML Styles section on page 83 for more information)

4.10.5.3.1. 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.

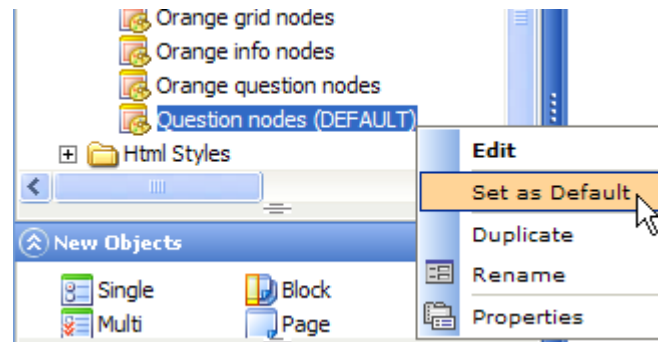


Figure 80 Setting a skin as Default

3. Save the changes.

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

4.10.5.3.2. 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 the Themes section on page 59 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 the How to Edit the Question Components section on page 82 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.

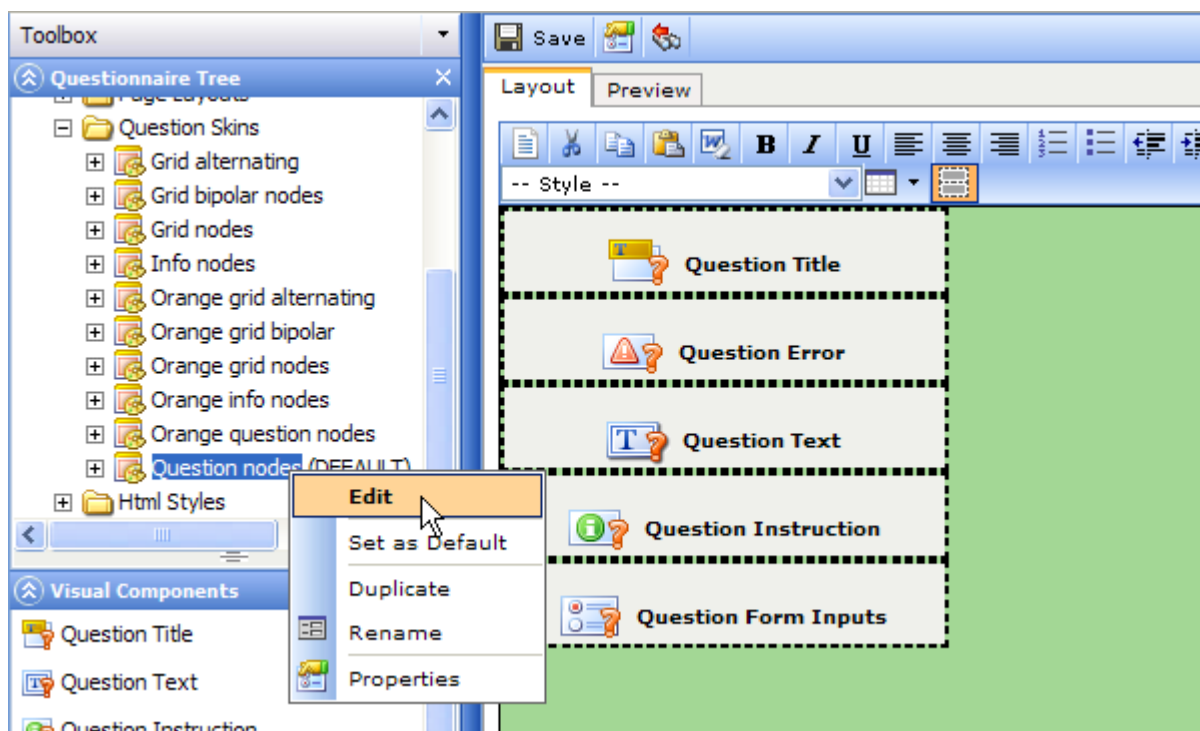


Figure 81 Editing a Question Skin

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.

4.10.5.3.3. 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.

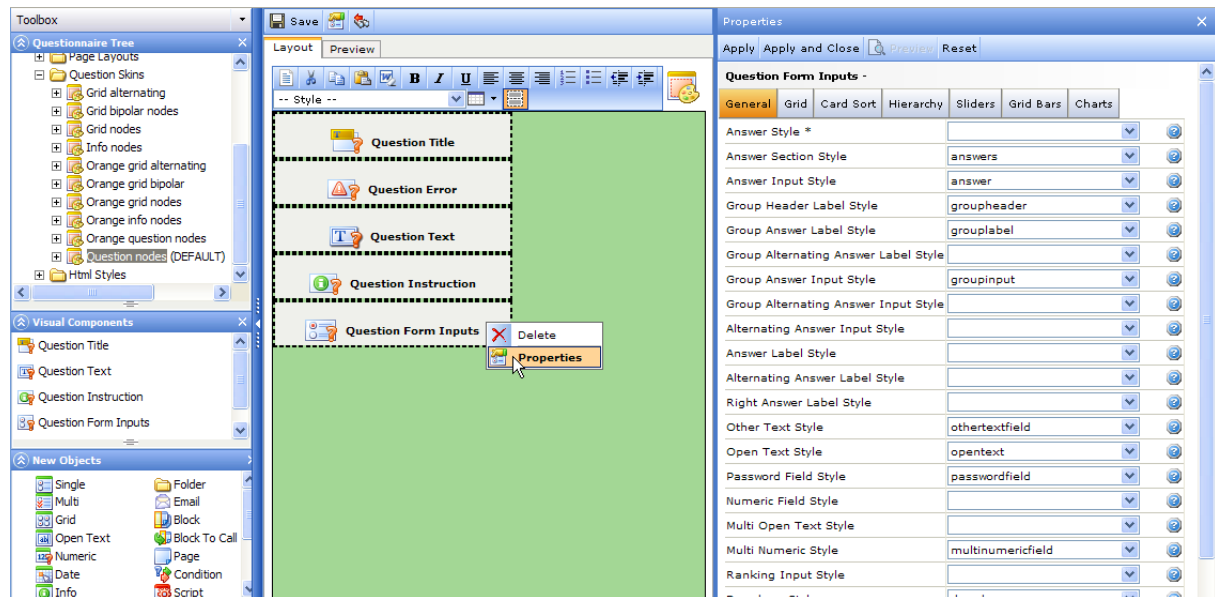


Figure 82 Example of the Question Form Inputs component's properties

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 the HTML Styles section on page 83 for more information).

Note: You can also use styles that are defined in external style sheets (see the Using an External Style Sheet section on page 65 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.

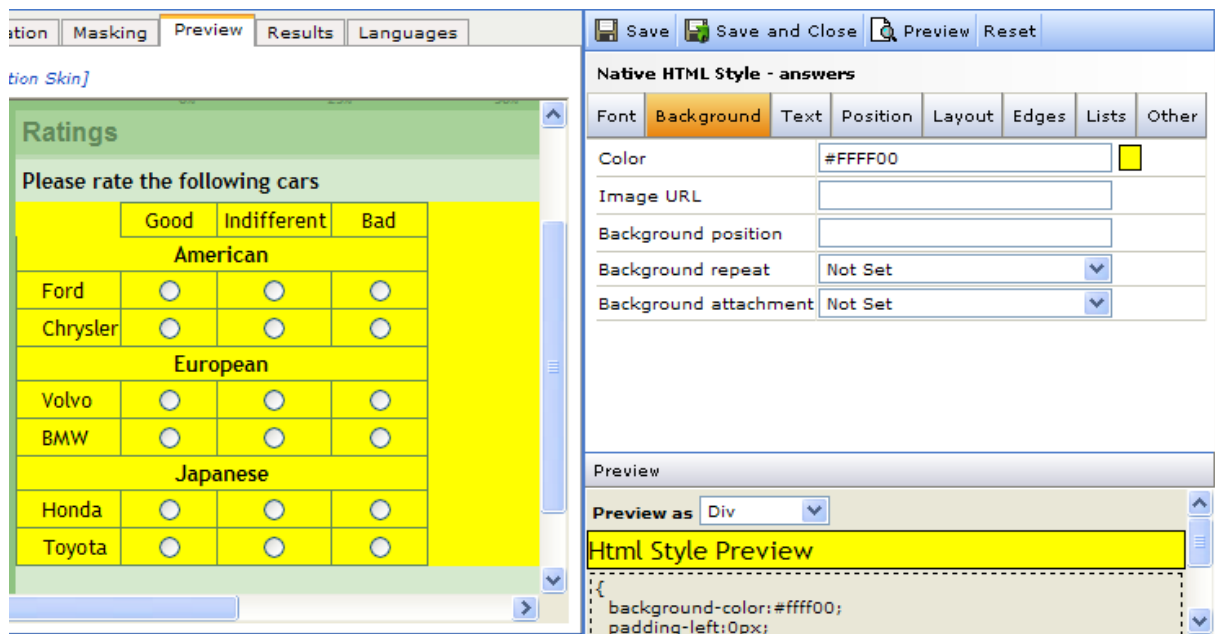


Figure 83 Example of the Answer Section style

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.

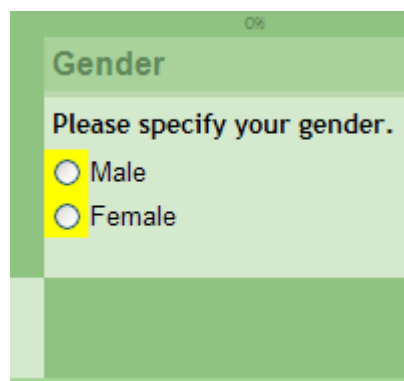


Figure 84 Example of the Answer Input style

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.

Save

Layout Preview

Cars

Please Rank the following cars

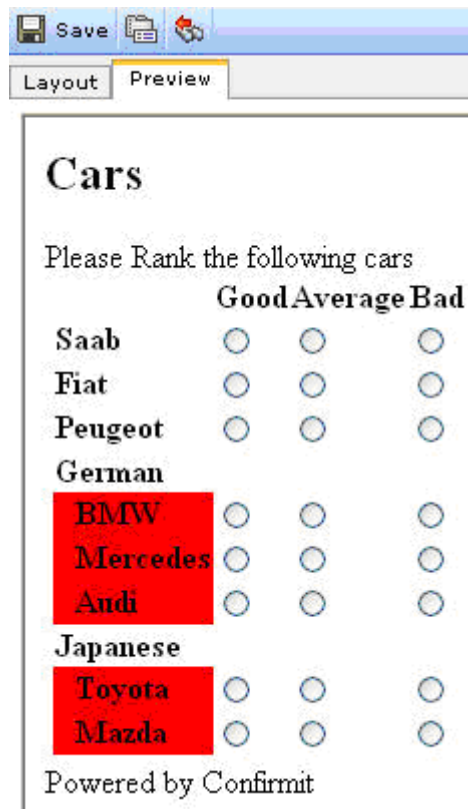
	Good	Average	Bad
Saab	☐	☐	☐
Fiat	☐	☐	☐
Peugeot	☐	☐	☐
German			
BMW	☐	☐	☐
Mercedes	☐	☐	☐
Audi	☐	☐	☐
Japanese			
Toyota	☐	☐	☐
Mazda	☐	☐	☐

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Figure 85 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.



Save

Layout Preview

Cars

Please Rank the following cars

	Good	Average	Bad
Saab	☐	☐	☐
Fiat	☐	☐	☐
Peugeot	☐	☐	☐
German			
BMW	☐	☐	☐
Mercedes	☐	☐	☐
Audi	☐	☐	☐
Japanese			
Toyota	☐	☐	☐
Mazda	☐	☐	☐

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Figure 86 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.

Cars

Please Rank the following cars

	Good	Average	Bad
Saab	☐	☐	☐
Fiat	☐	☐	☐
Peugeot	☐	☐	☐
German			
BMW	☐	☐	☐
Mercedes	☐	☐	☐
Audi	☐	☐	☐
Japanese			
Toyota	☐	☐	☐
Mazda	☐	☐	☐

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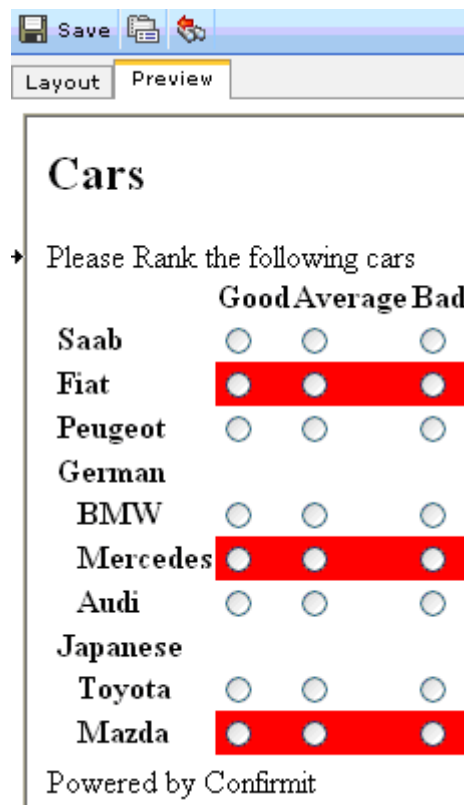
Figure 87 Example of the Group Answer Input style

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.



Save Preview

Layout Preview

Cars

→ Please Rank the following cars

	Good	Average	Bad
Saab	☐	☐	☐
Fiat	☒	☒	☒
Peugeot	☐	☐	☐
German			
BMW	☐	☐	☐
Mercedes	☒	☒	☒
Audi	☐	☐	☐
Japanese			
Toyota	☐	☐	☐
Mazda	☒	☒	☒

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Figure 88 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.

Cars

Please Rank the following cars

	Good	Average	Bad
Saab	☐	☐	☐
Fiat	☐	☐	☐
Peugeot	☐	☐	☐
German			
BMW	☐	☐	☐
Mercedes	☐	☐	☐
Audi	☐	☐	☐
Japanese			
Toyota	☐	☐	☐
Mazda	☐	☐	☐

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Figure 89 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).

Cars

Please Rank the following cars

	Good	Average	Bad
Saab	☐	☐	☐
Fiat	☐	☐	☐
Peugeot	☐	☐	☐
German	☐	☐	☐
BMW	☐	☐	☐
Mercedes	☐	☐	☐
Audi	☐	☐	☐
Japanese	☐	☐	☐
Toyota	☐	☐	☐
Mazda	☐	☐	☐

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Figure 90 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.

Car description

Please Rank the following qualities

	-1	0	1	
Good	☐	☐	☐	Bad
Big	☐	☐	☐	Small
Comfortable	☐	☐	☐	Uncomfortable

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Figure 91 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.

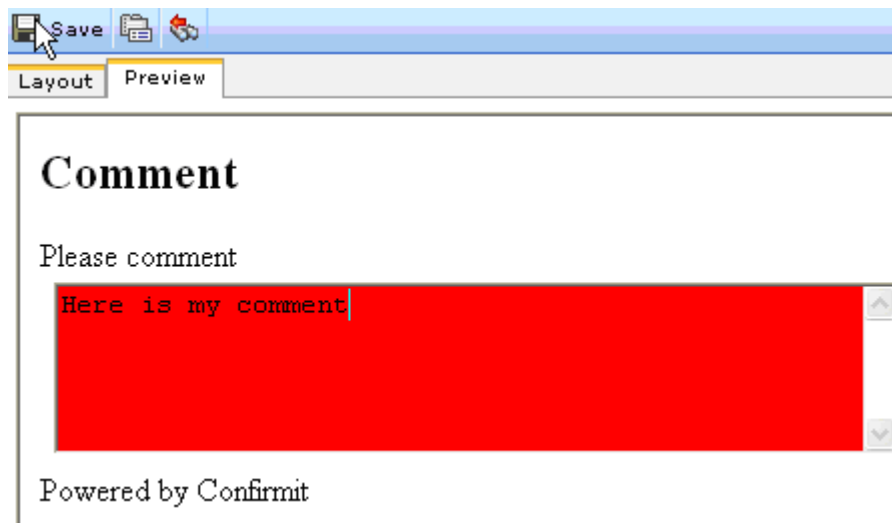


Figure 92 Example of the Open Text style

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.

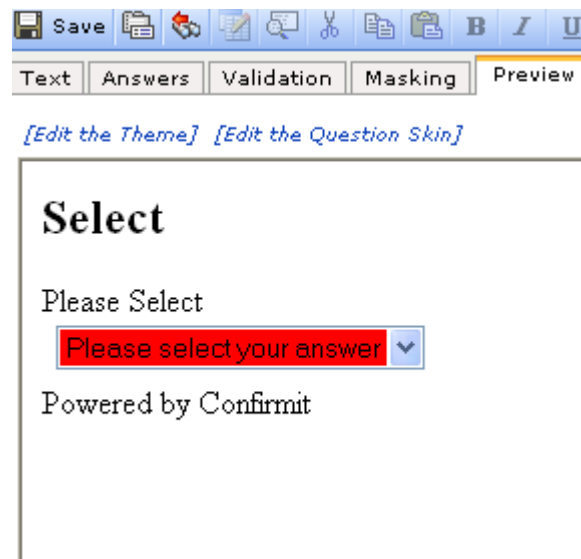


Figure 93 Example of the Drop-down style

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.

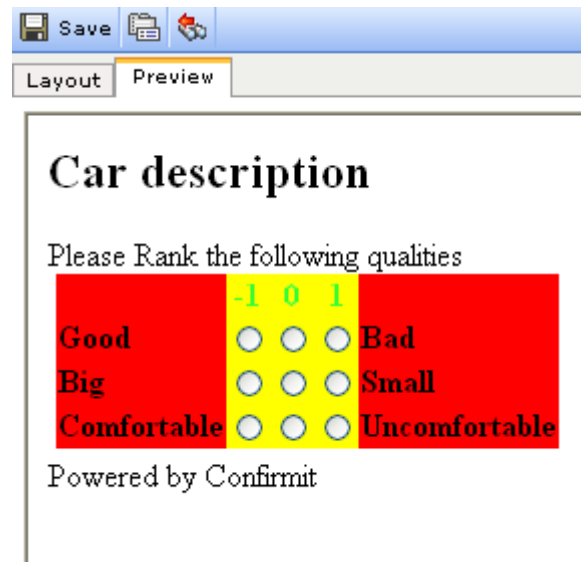


Figure 94 Example of the Grid Label Style

Grid Table Error Cell Style

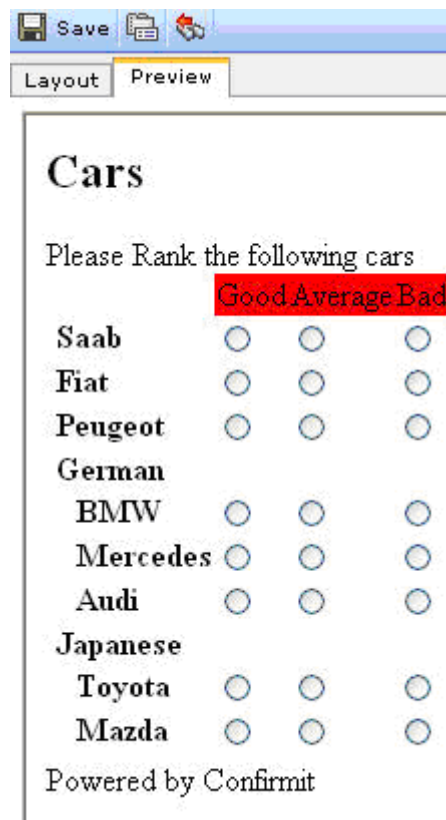
This specifies the style to be used in the event the respondent makes an error when answering a grid question (see the How to Highlight Error Cells section on page 214 for more information).

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.



Save

Layout Preview

Cars

Please Rank the following cars

	Good	Average	Bad
Saab	☐	☐	☐
Fiat	☐	☐	☐
Peugeot	☐	☐	☐
German			
BMW	☐	☐	☐
Mercedes	☐	☐	☐
Audi	☐	☐	☐
Japanese			
Toyota	☐	☐	☐
Mazda	☐	☐	☐

Powered by Confirmit

Figure 95 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 overridden 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 the Scale section on page 181 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 The Advanced WI Features Tab section on page 189 for more information).

Slider Styles

The styles you select on this tab specify the look and layout of the slider functionality. 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 the The Advanced WI Features Tab section on page 189 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 The Grid Object section on page 163 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 The Advanced WI Features Tab section on page 189 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.

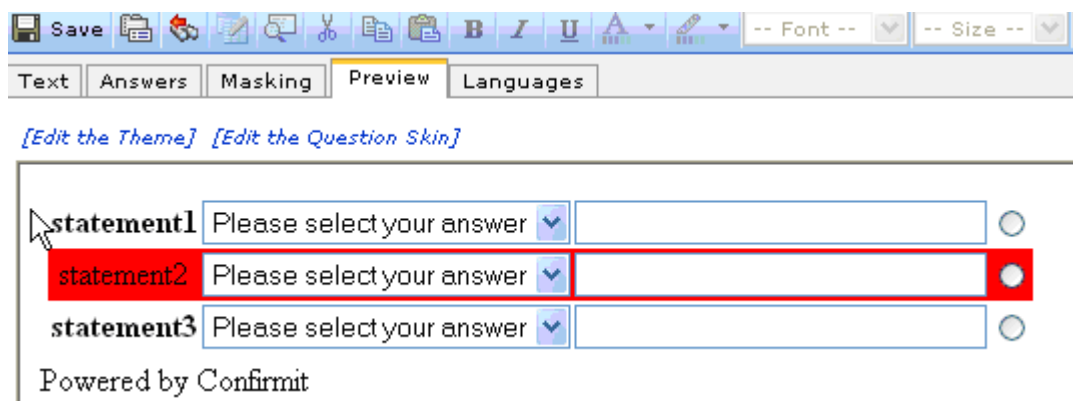


Figure 96 Example of a Style on Specific Answer

4.10.5.3.4. 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 the HTML Styles section on page 83 for more information)

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

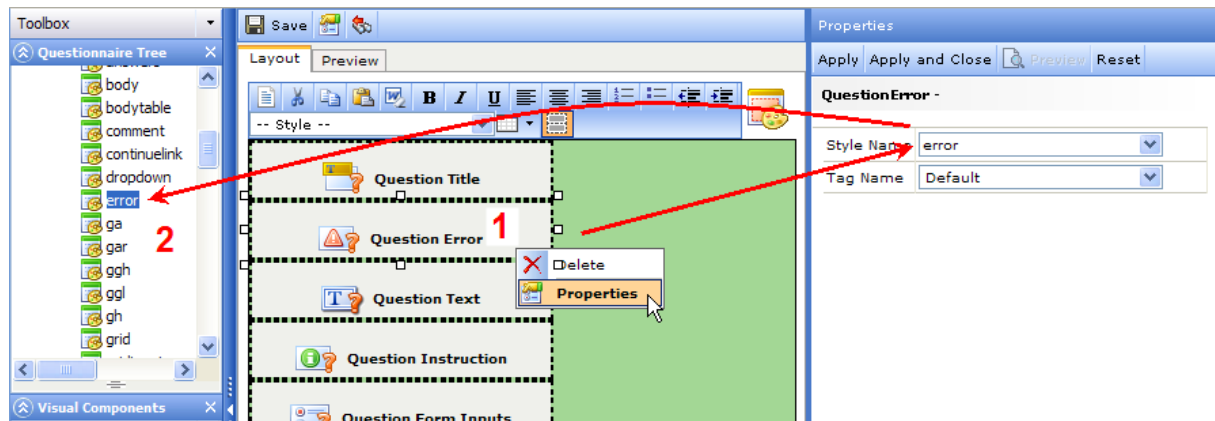


Figure 97 Editing a Question Visual Component

4.10.5.3.5. 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.

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'.

4.10.5.4. 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 project, and each style can be used any number of times, in any number of survey pages.

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.

4.10.5.4.1. 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 and choose **Edit**) . 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.

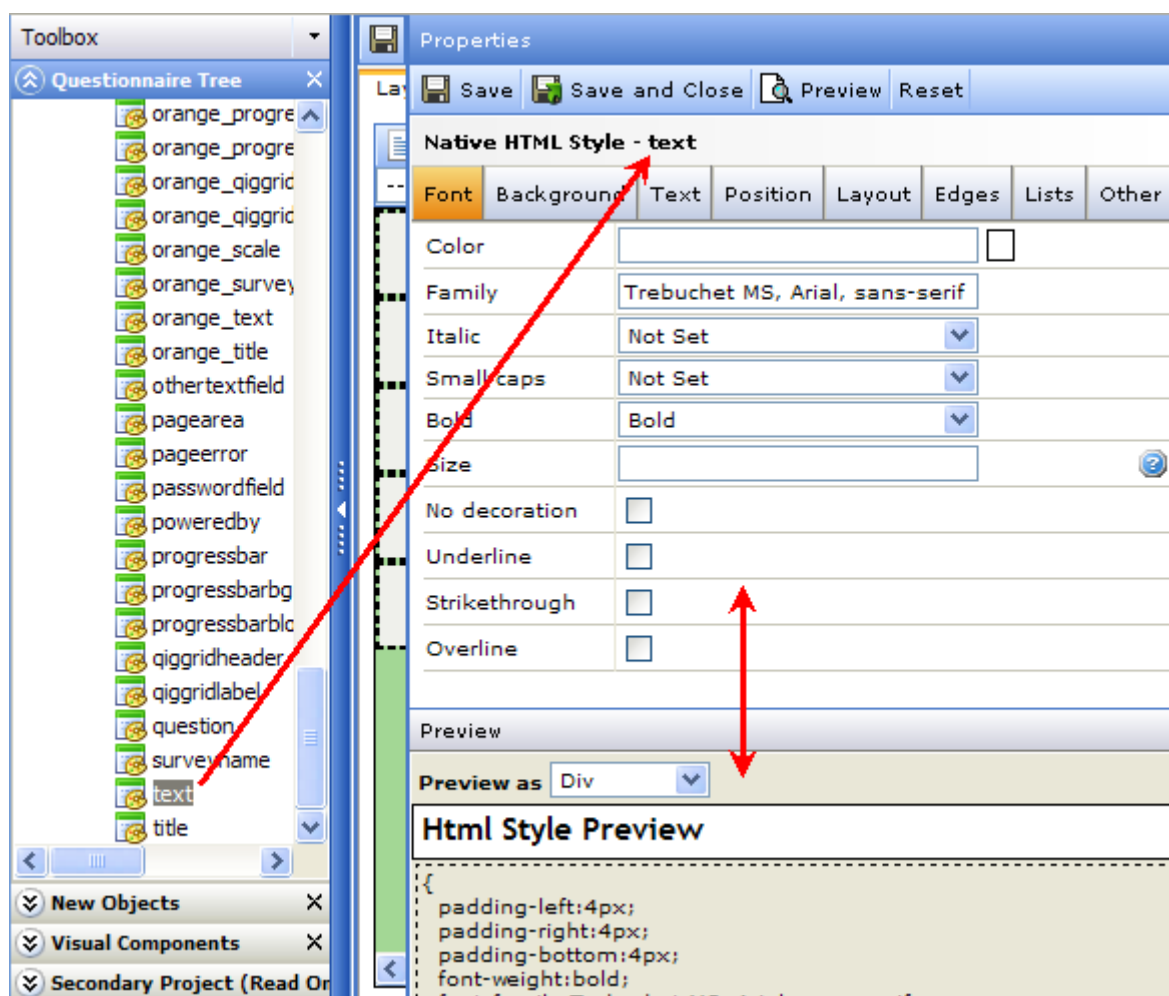


Figure 98 Working with HTML Styles

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.

4.10.5.4.2. 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.

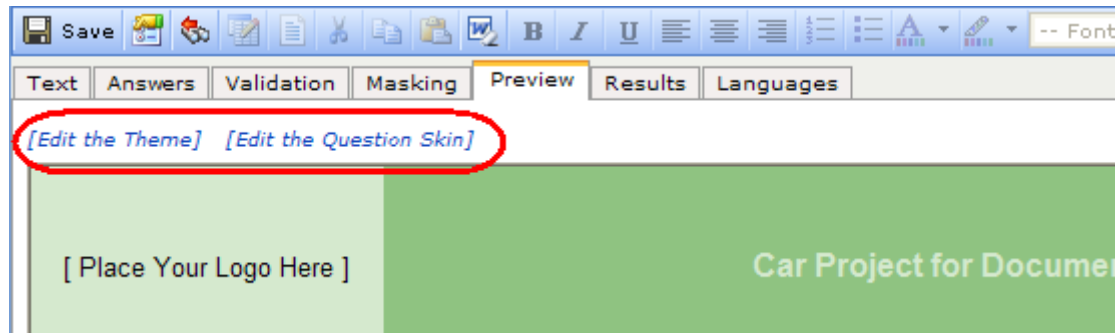


Figure 99 Shortcuts from Question Preview

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

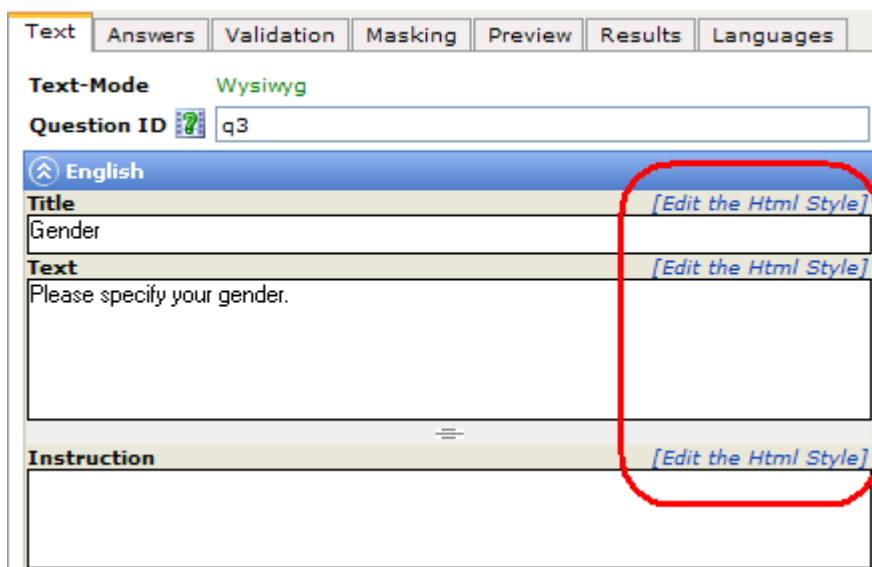


Figure 100 Shortcuts from Question Texts

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.

Properties (Changes made)

Single Question - (q3)

General | Advanced WI Features | Translation status

List rows		?
List columns		?
Field width		?
Other box rows		?
Other box columns		?
Drop down	☐	
Indexed	☐	?
Answers	Normal answerlist	?
Answer list display order	In order	?
Group display order	In order	?
Variable type	Normal	
Question Skin	Grid nodes	
Boolean	☐	
Not required	☐	
Read only	☐	

Edit this Question Skin

Figure 101 Shortcut to Styles

4.10.5.4.3. HTML Style Properties

The HTML Style Properties sheet contains eight tabs as follows.

Font | Background | Text | Position | Layout | Edges | Lists | Other

Figure 102 The Style Properties sheet tabs

- **Font** - defines the font color, family, size etc. of the text used in the style (see the HTML Style Properties > Font Tab section on page 87 for more information).
- **Background** - defines the color and background image (if used) for the style (see the HTML Style Properties > Background Tab section on page 87 for more information).
- **Text** - defines letter spacing, indents, alignments etc. for any text used in the style (see the HTML Style Properties > Text Tab section on page 88 for more information).
- **Position** - defines the position on the page for elements using this style (see the HTML Style Properties > Position Tab section on page 90 for more information).
- **Layout** - defines how items using this style are to appear on the page (see the HTML Style Properties > Layout Tab section on page 91 for more information).
- **Edges** - defines how the margins and border lines for objects using the style are to look (see the HTML Style Properties > Edges Tab section on page 92 for more information).
- **Lists** - defines how any lists using the style are to look (see the HTML Style Properties > Lists Tab section on page 93 for more information).
- **Other** - lists other properties that do not fall naturally under the other tabs (see the HTML Style Properties > Other Tab section on page 93 for more information).

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.

HTML Style Properties > Font Tab

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

The screenshot shows a software interface for editing HTML styles. At the top, there are buttons for 'Save', 'Save and Close', 'Preview', and 'Reset'. Below these is a title bar 'Native HTML Style - answerlabel'. A row of tabs includes 'Font' (selected), 'Background', 'Text', 'Position', 'Layout', 'Edges', 'Lists', and 'Other'. The 'Font' tab contains several settings: 'Color' with a text box and a color selection box; 'Family' with a text box; 'Italic', 'Small caps', and 'Bold' each with a dropdown menu currently showing 'Not Set'; 'Size' with a text box showing '100%' and a help icon; and 'No decoration', 'Underline', 'Strikethrough', and 'Overline' each with an unchecked checkbox.

Figure 103 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.
- **Italic** - applies the *Italics* property to the selected text.
- **Small caps** - applies the SMALL CAPITALS property to the selected text.
- **Bold** - 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.

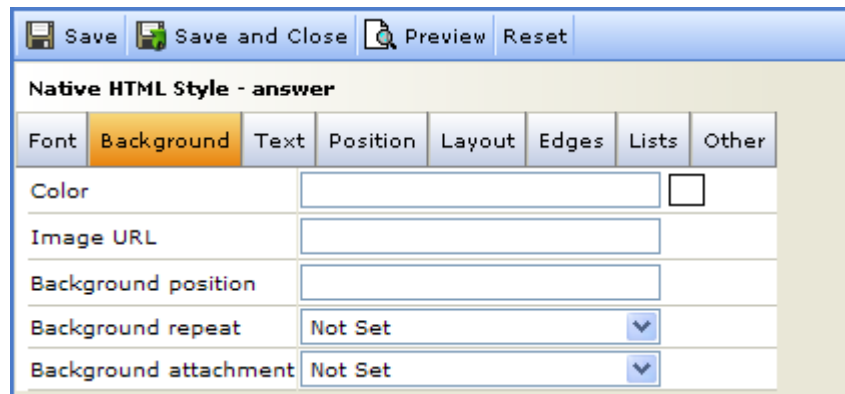


Figure 104 The HTML Style Properties > Background tab

- **Color** - specifies the color of the 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:
 - o **Not set** - (default).
 - o **NoRepeat** - the image is only shown once in the object.
 - o **Repeat** - the image repeats in both directions.
 - o **RepeatX** - the image only repeats in the X (vertical) direction.
 - o **RepeatY** - the image only repeats in the Y (horizontal) direction.
 - o **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:
 - o **Not set** - (default).
 - o **Fixed** - the image is fixed within the viewing area.
 - o **Scroll** - the image moves with the object as the respondent scrolls the questionnaire page.
 - o **Inherit** - the image inherits the Attachment property from the stylesheet.

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.

Native HTML Style - answer							
Font	Background	Text	Position	Layout	Edges	Lists	Other
Letter spacing							
Text indent							
Word spacing							
Line height							
Text transform		Not Set					
White space		Not Set					
Vertical alignment		Not Set					
Horizontal alignment		Not Set					

Figure 105 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 rendered. The options are:
 - o **NotSet** - (default) makes no specific setting at this level. This allows the next level up to specify the setting.
 - o **Capitalize** - makes the first letter of every word upper-case.
 - o **Lowercase** - makes all the letters lower case.
 - o **Uppercase** - makes all the letters upper case.
 - o **None** - text is not transformed.
- **White space** - defines how lines of text are to be wrapped within the object. The options are:
 - o **NotSet** - (default) makes no specific setting at this level. This allows the next level up to specify the setting.
 - o **Normal** - white space is ignored by the browser.
 - o **NoWrap** - line breaks are suppressed. Content does not wrap to the next line.
 - o **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:
 - o **NotSet** - (default) makes no specific setting at this level. This allows the next level up to specify the setting.
 - o **Auto** -
 - o **Baseline** - aligns the baseline of the element with the baseline of the parent element.
 - o **Bottom** - the bottom of the element is aligned with the lowest element on the line.
 - o **Middle** - the element is placed in the middle of the parent element.
 - o **Subscript** - aligns the element as if it was subscript.
 - o **Superscript** - aligns the element as it was superscript.
 - o **Text Bottom** - the bottom of the element is aligned with the bottom of the parent element's font.
 - o **Text Top** - the top of the element is aligned with the top of the parent element's font.

- o **Top** - the top of the element is aligned with the top of the tallest element on the line.
- o **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:
 - o **NotSet** - (default) makes no specific setting at this level. This allows the next level up to specify the setting.
 - o **Left** - places the text at the left end of the line (see the note below).
 - o **Centered** - places the text at the center of the line.
 - o **Right** - places the text at the right end of the line (see the note below).
 - o **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.

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.

The screenshot shows a software interface for editing HTML styles. At the top, there are buttons for 'Save', 'Save and Close', 'Preview', and 'Reset'. Below these is a title bar 'Native HTML Style - answer'. A row of tabs includes 'Font', 'Background', 'Text', 'Position' (which is highlighted in orange), 'Layout', 'Edges', 'Lists', and 'Other'. Under the 'Position' tab, there are five input fields: 'Width' with the value '20px', 'Height', 'Min Width', 'Min Height', and 'Type' with a dropdown menu currently showing 'NotSet'.

Figure 106 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.
- **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.
- **Type** - places an element in a Static, Relative or Absolute position. When Relative or Absolute is selected, five additional properties become available.
 - o **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.
 - o **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.
 - o **Absolute** - the element is positioned at the specified coordinates relative to its containing block. The element's position is 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.

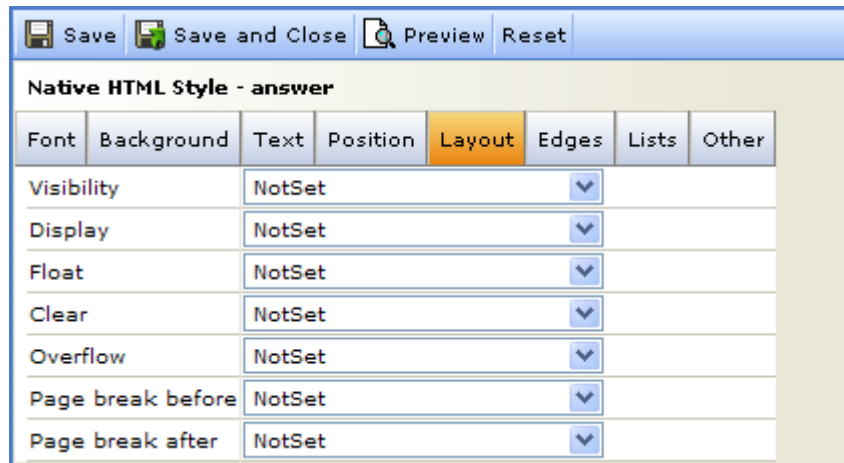


Figure 107 The HTML Style Properties > Layout tab

- **Visibility** - this property specifies whether or not the content of the object is to be displayed. The options are:
 - o **NotSet**(default) makes no specific setting at this level. This allows the next level up to specify the setting.
 - o **Visible** - the object content is visible.
 - o **Hidden** - the object content is hidden.
- **Display** - specifies how the object is displayed. The options are:
 - o **NotSet**(default) makes no specific setting at this level. This allows the next level up to specify the setting.
 - o **Inline** - the object is rendered as an inline element.
 - o **Block** - the object is rendered as a block element.
 - o **None** - the object is not rendered.
- **Float** - sets where an image or text is to appear within another element.
 - o **NotSet**(default) makes no specific setting at this level. This allows the next level up to specify the setting.
 - o **None** - (Default) the image or text will be displayed where it occurs in the HTML code.
 - o **Left** - the image or text moves to the left in the parent element.
 - o **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.
 - o **NotSet**(default) makes no specific setting at this level. This allows the next level up to specify the setting.
 - o **Both** - no floating elements are allowed on either the left or right sides.
 - o **Left** - no floating elements are allowed on the left side.
 - o **Right** - no floating elements are allowed on the right side.
 - o **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:

- o **NotSet**(default) makes no specific setting at this level. This allows the next level up to specify the setting.
- o **Auto** - the content is clipped and scroll bars added only when necessary.
- o **Scroll** - the content is clipped and scroll bars are added even if the content does not exceed the dimensions of the object.
- o **Visible** - the content is not clipped and scrollbars are not added.
- o **Hidden** - content that exceeds the dimensions of the object is not shown.
- **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:
 - o **NotSet**(default) makes no specific setting at this level. This allows the next level up to specify the setting.
 - o **Always** - always inserts a page break before the object.
 - o **Auto** - neither forces nor forbids a page break before the object.
 - o **Avoid** - does not allow a page break before the object.
 - o **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.
 - o **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.
 - o **NotSet**(default) makes no specific setting at this level. This allows the next level up to specify the setting.
 - o **Always** - always inserts a page break after the object.
 - o **Auto** - neither forces nor forbids a page after the object.
 - o **Avoid** - does not allow a page break after the object.
 - o **Left** - always inserts a page break after the object if the object is on a "left" page.
 - o **Right** - always inserts a page break after the object if the object is on a "right" page.

HTML Style Properties > Edges Tab

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

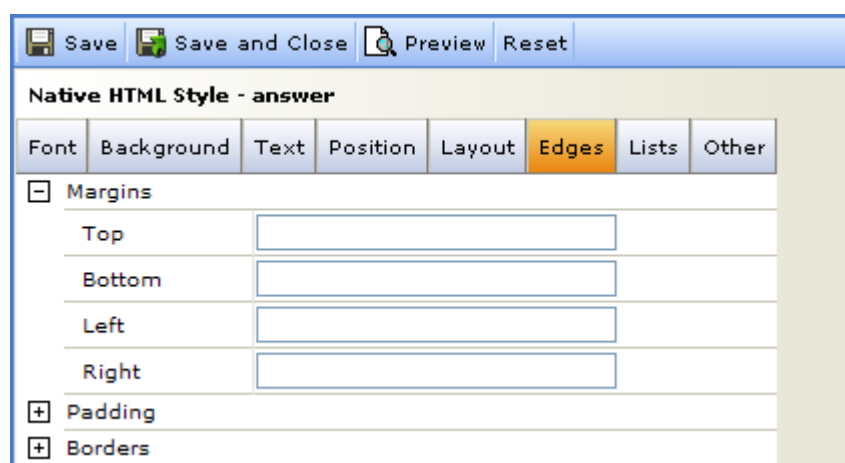


Figure 108 The HTML Style Properties > Edges tab

- **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.

- **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.
- **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.
 - o **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.
 - o **Style** - use the Line Style property to specify the type of line you wish to use for the border; solid, dotted etc.
 - o **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.

The screenshot shows a 'Borders' panel with a sub-section 'All' expanded. It contains three input fields: 'Color' with a color selection box, 'Style' with a dropdown menu set to 'None', and 'Width' with a text input field. A '+ Top' button is visible at the bottom of the panel.

Figure 109 The Borders > All properties expanded

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.

The screenshot shows a 'Native HTML Style - answer' window with several tabs: Font, Background, Text, Position, Layout, Edges, Lists, and Other. The 'Lists' tab is selected and highlighted. It contains three input fields: 'Image URL' with a text input, 'Position' with a dropdown menu set to 'NotSet', and 'Type' with a dropdown menu set to 'NotSet'.

Figure 110 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.

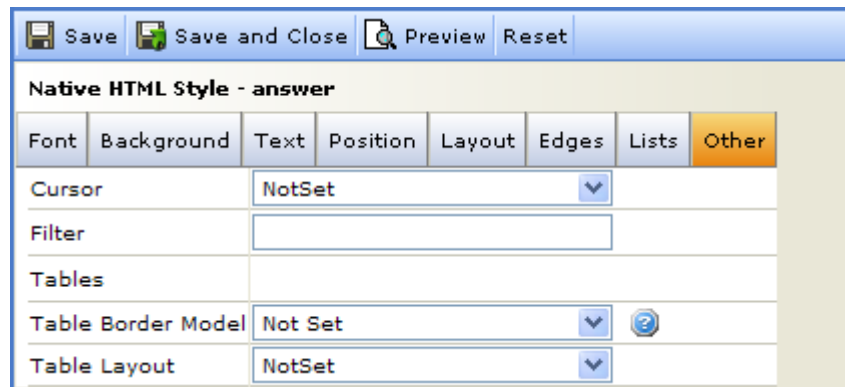


Figure 111 The HTML Style Properties > Other tab

- **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**
 - o **Collapse** - borders are collapsed into a single border when possible..
 - o **Separate** - borders are detached.
- **Table Layout** - specifies whether the table layout is fixed or automatic. The options are:
 - o **NotSet**
 - 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%.

4.10.5.5. Applying a Survey Layout to a Survey

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

Save Save and Use as Default Settings

General Options Survey Channels Web Options CAPI/Kiosk Options CATI Options **Layout** Validation & XSS

Active Database Production

Overall options

Web Interview Template to use Type first letter(s) to filter

☒ Use Survey Layout Benefits...

Survey Layout to use Public Survey Layout - A1 - Green and O Type first letter(s) to filter

☒ Include progress bar

☐ Reserve a fixed area for validation error messages on every page of interview

☐ Set focus to first control on page (requires JavaScript)

Accessibility options

WI Template

Figure 112 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 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 projects using the selected survey layout. From here you can open the projects using the layout by clicking on the appropriate Project ID link.

4.10.5.6. 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 or debug station. 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 section on page 220 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.

Questionnaire Tree

- My Television Survey (p0400406)
 - Dynamic layout settings (Script)
 - i1 - Welcome (Info)
 - region - Region (Single)
 - Age and Gender
 - gender - Gender (Single)
 - age - Age (Single)
 - Multiple questions per page

General

Name Age and Gender

Order In Order

Theme

Page layout ^findPageLayout()^

Deleted

Figure 113 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.

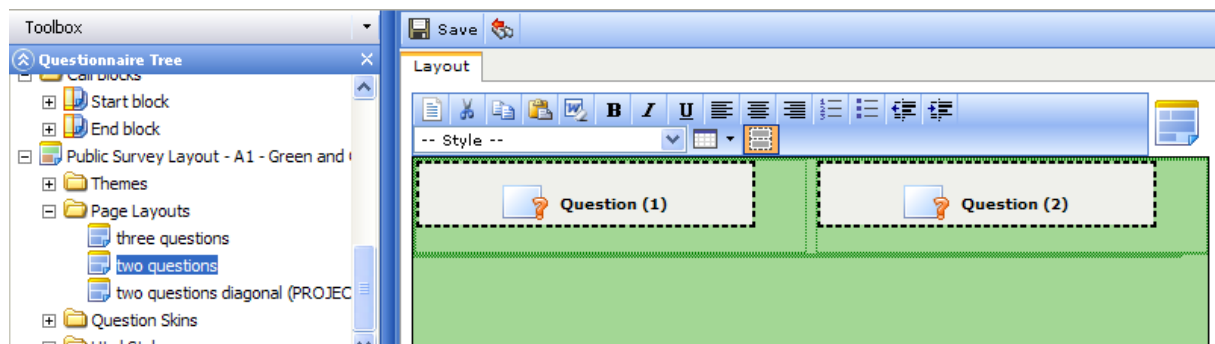


Figure 114 The "two questions" page layout

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.

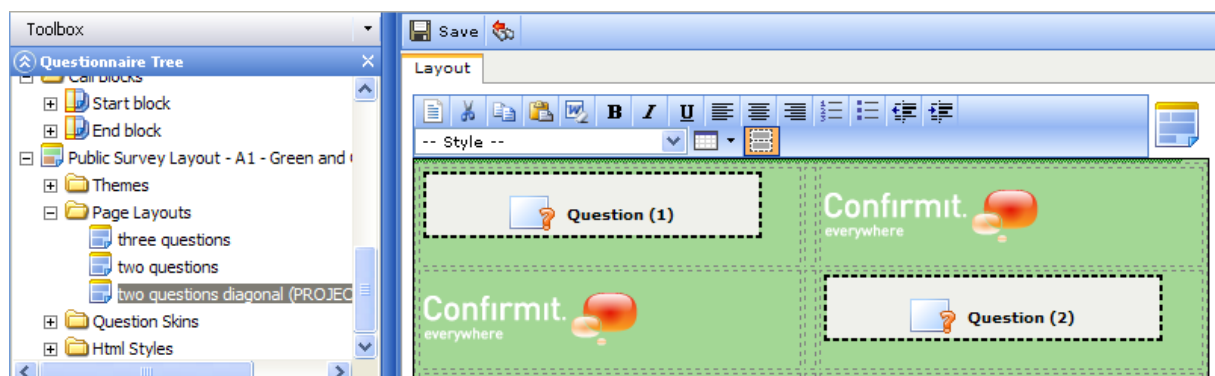


Figure 115 The "two questions diagonal" page layout

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.

Gender	Age
Please specify your gender.	Adam Apple, please specify your age.
☒ Male	☐ Under 18
☐ Female	☐ 18 to 30
	☐ 31 to 50
	☒ 51 to 67
	☐ 68 or older
<< >>	

Figure 116 Gender and Age for Non-Europeans

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

Gender	Age
Please specify your gender.	Adam Apple, please specify your age.
☒ Male	☐ Under 18
☐ Female	☐ 18 to 30
	☒ 31 to 50
	☐ 51 to 67
	☐ 68 or older
<< >>	

Figure 117 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.

4.10.6. 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.

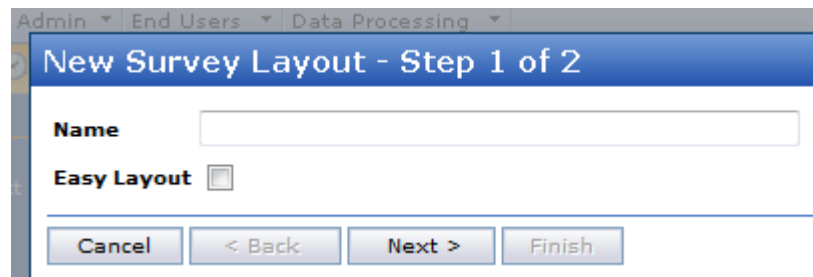


Figure 118 Step 1 of the New Survey Layout wizard

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.

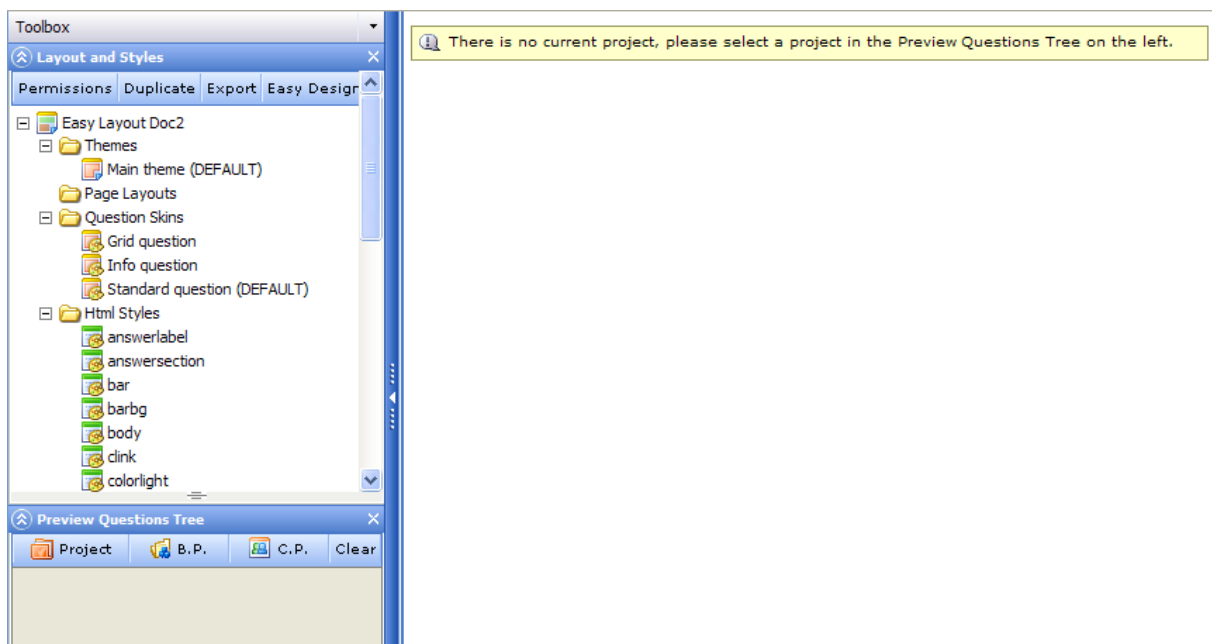


Figure 119 The Survey Layout Editor with the new Easy Layout layout in the toolbox

You can now edit your new Easy Layout and set it up as required (see the Editing an Easy Layout section on page 99 for more information). Note that for a preview to be displayed, a project must be selected.

4.10.7. 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 project 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 "Project 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 project so that the preview can be displayed. The project 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 project every time you open an Easy Layout for editing.

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

The Project List window opens, listing all the projects to which you have access.

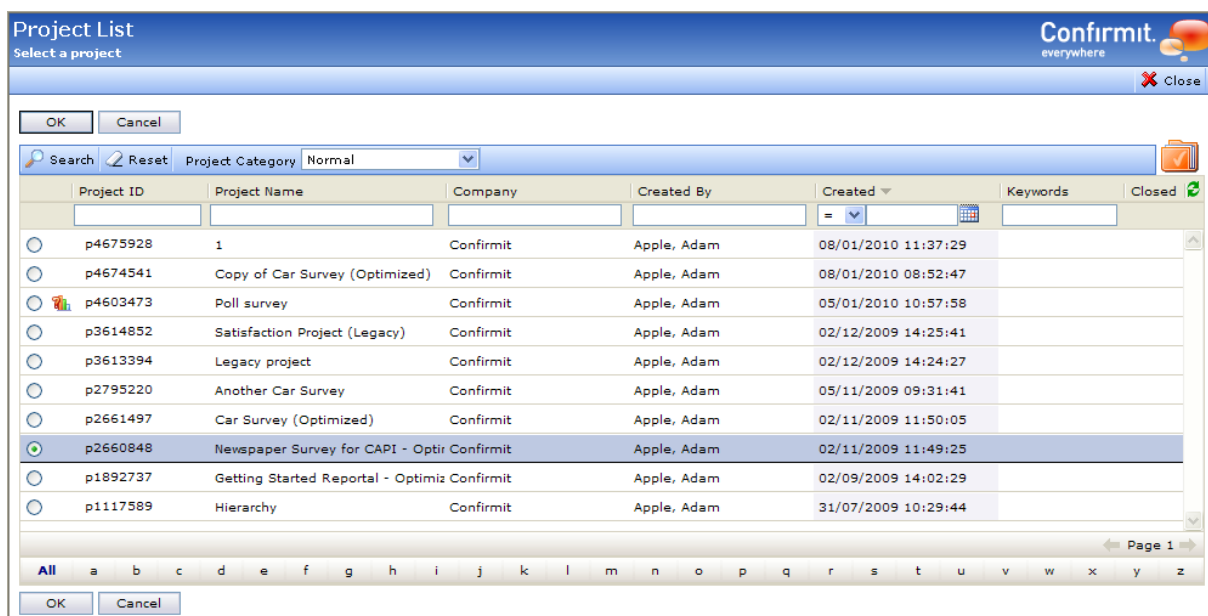


Figure 120 Example of the Project List window

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

Note that you should select a project 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 project 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 project as the preview. You can now set up the Easy layout as required.

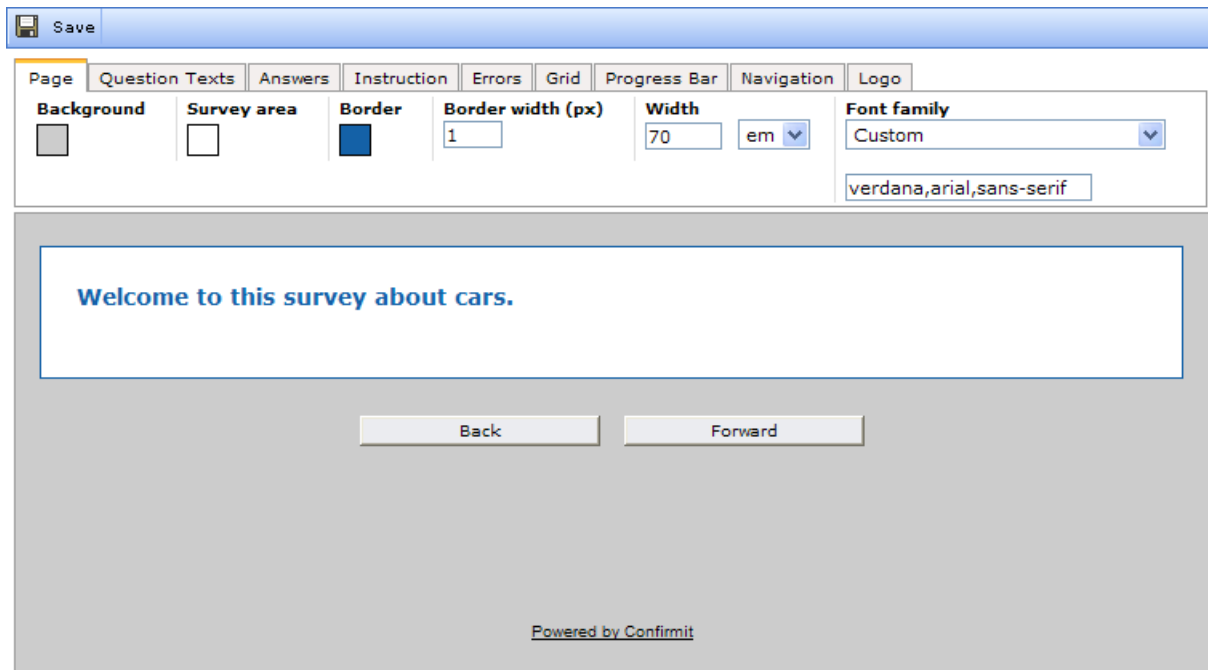


Figure 121 Example of the Easy Layout editing page

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.

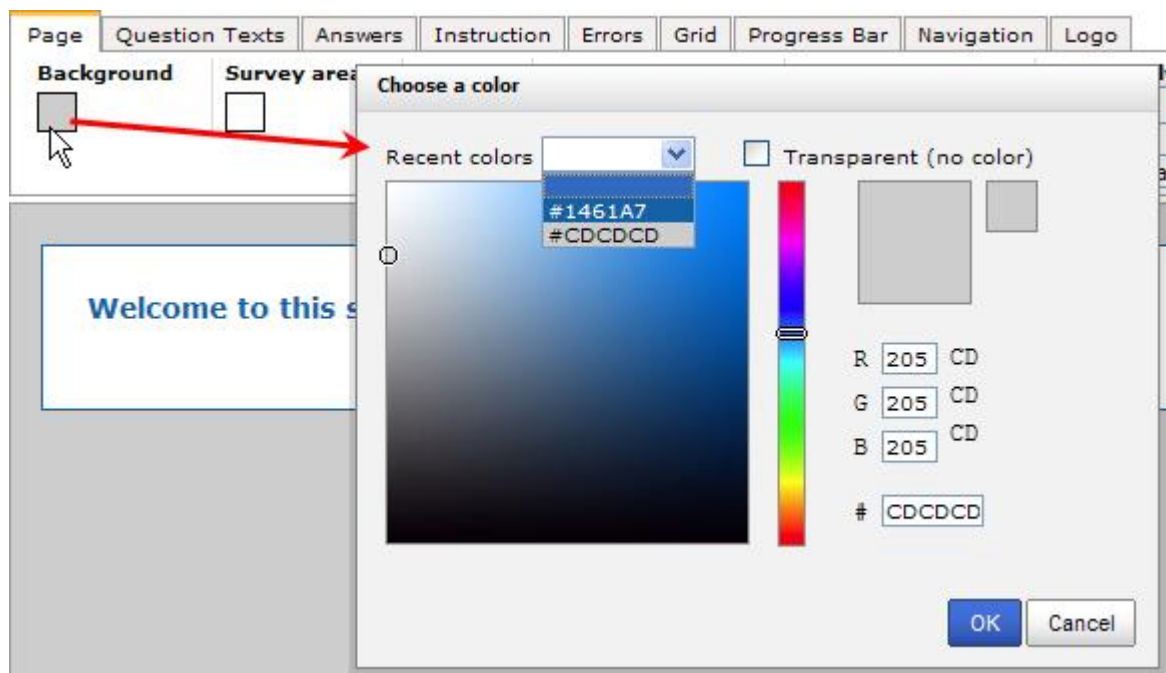


Figure 122 Example of the color selection dialog

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.

4.10.7.1. 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.

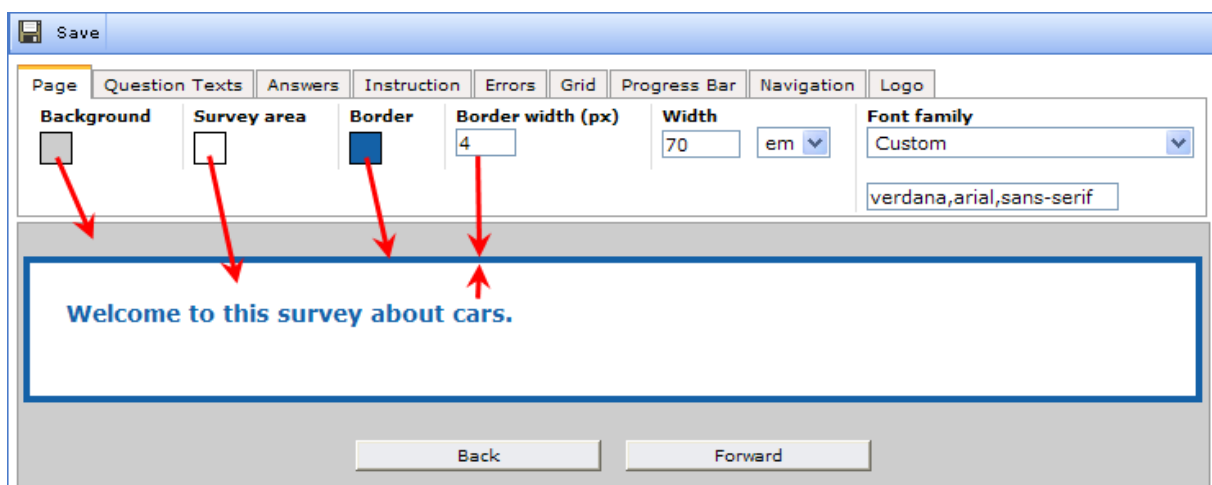


Figure 123 Example of the Page tab

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

4.10.7.2. 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.

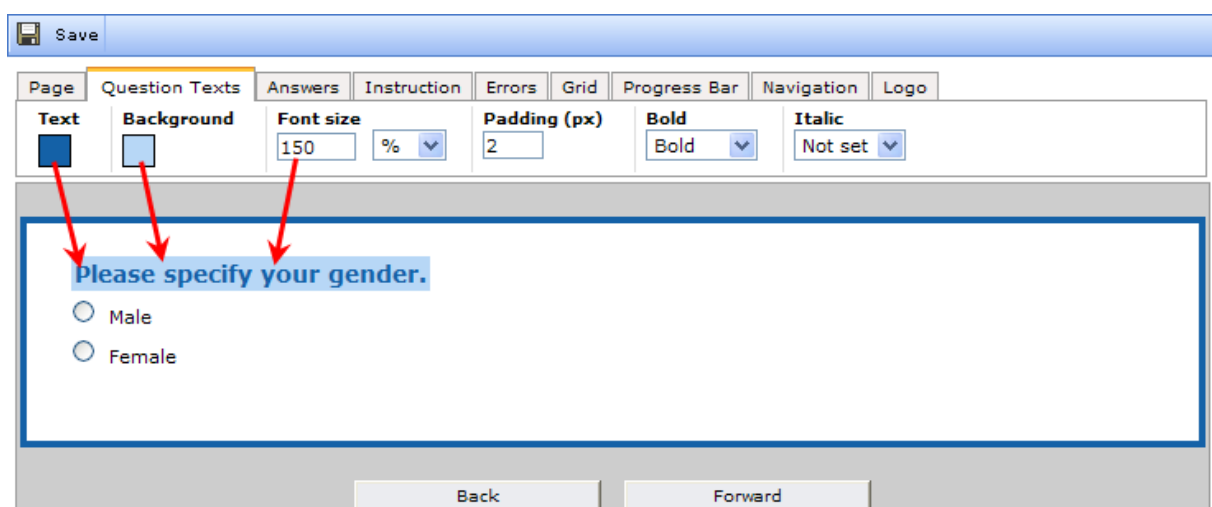


Figure 124 Example of the Questions tab

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.

4.10.7.3. 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.

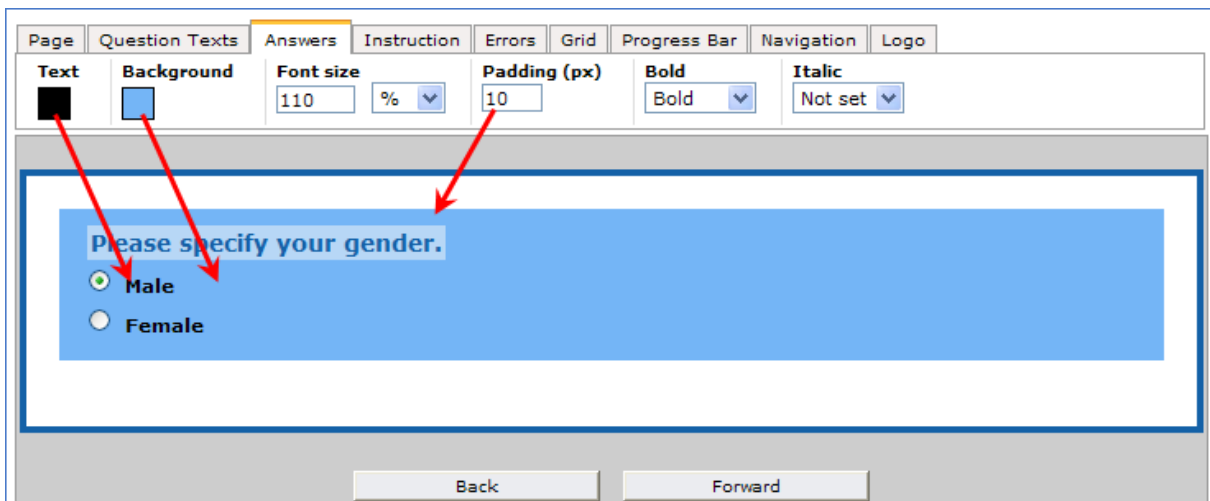


Figure 125 Example of the Answers tab

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.

4.10.7.4. 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.

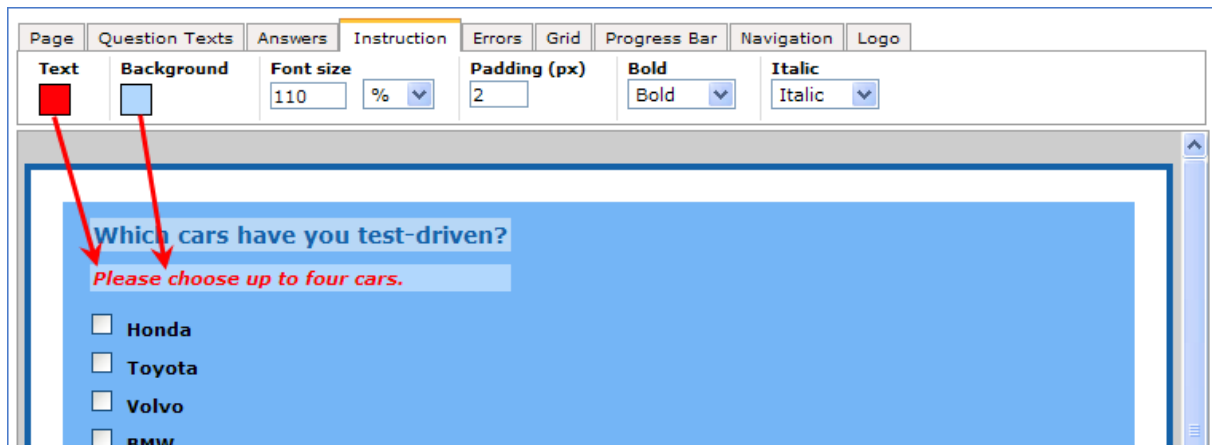


Figure 126 Example of the Instruction tab

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.

4.10.7.5. 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.

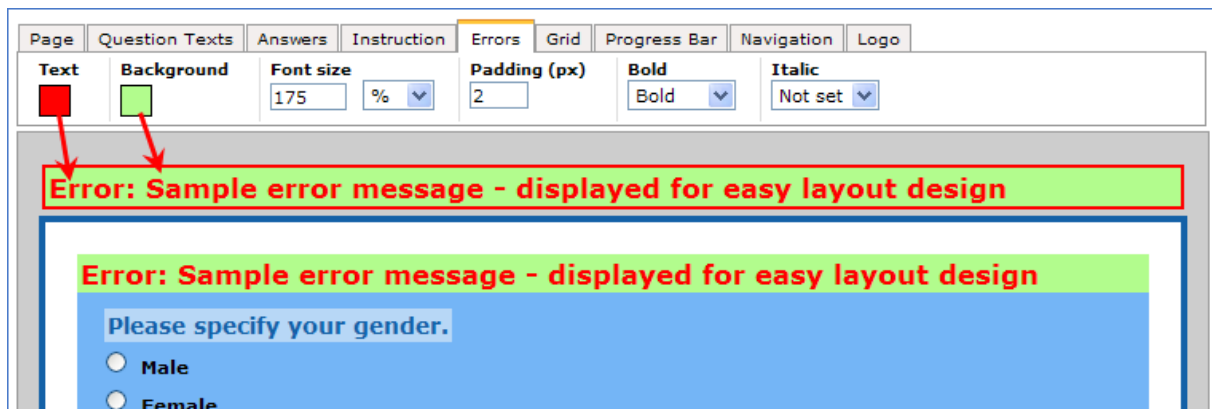


Figure 127 Example of the Errors tab

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.

4.10.7.6. 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.

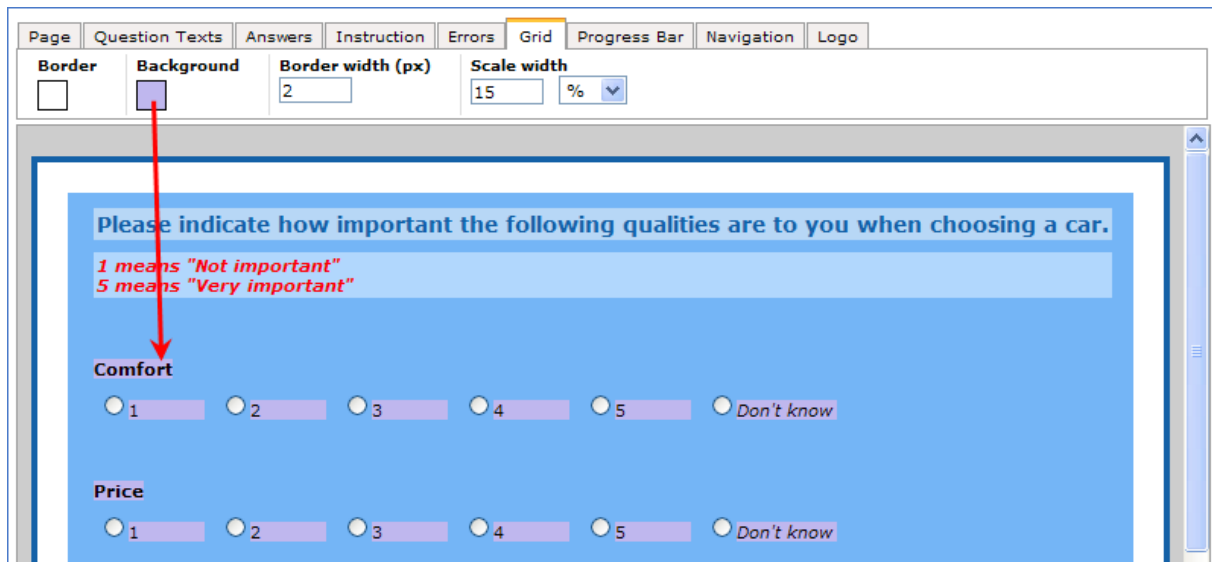


Figure 128 Example of the Grid tab

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.

4.10.7.7. 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 .

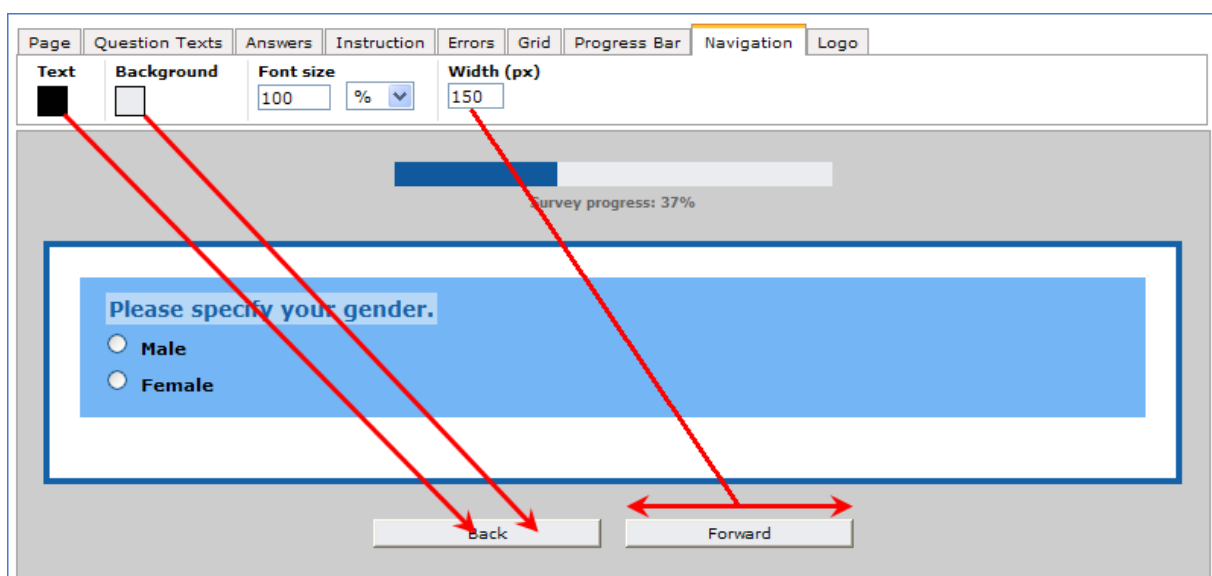


Figure 129 Example of the Layout tab

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.

4.10.7.8. 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 project you have selected to use for the preview includes a progress bar (see the Include Progress Bar section on page 366 for more information), then you will be able to view the results.

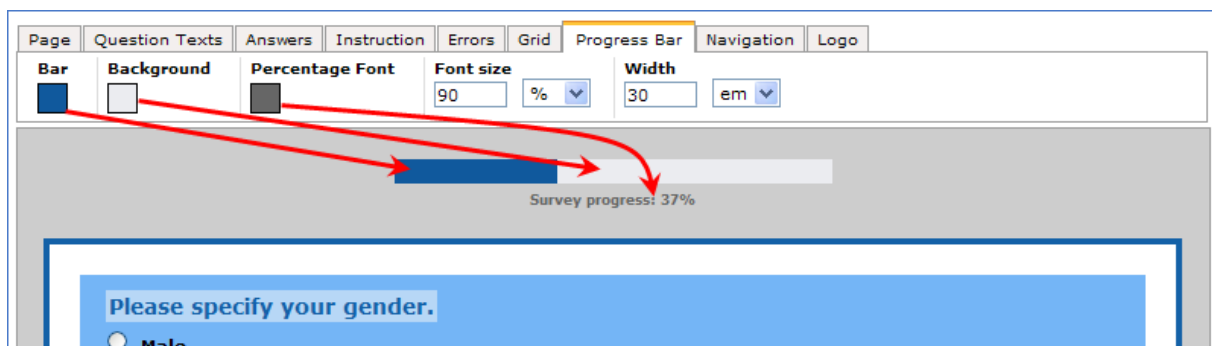


Figure 130 Example of the Progress Bar tab

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.

4.10.7.9. 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 projects using the Easy layout, and also specify where on the page the logo is to appear.

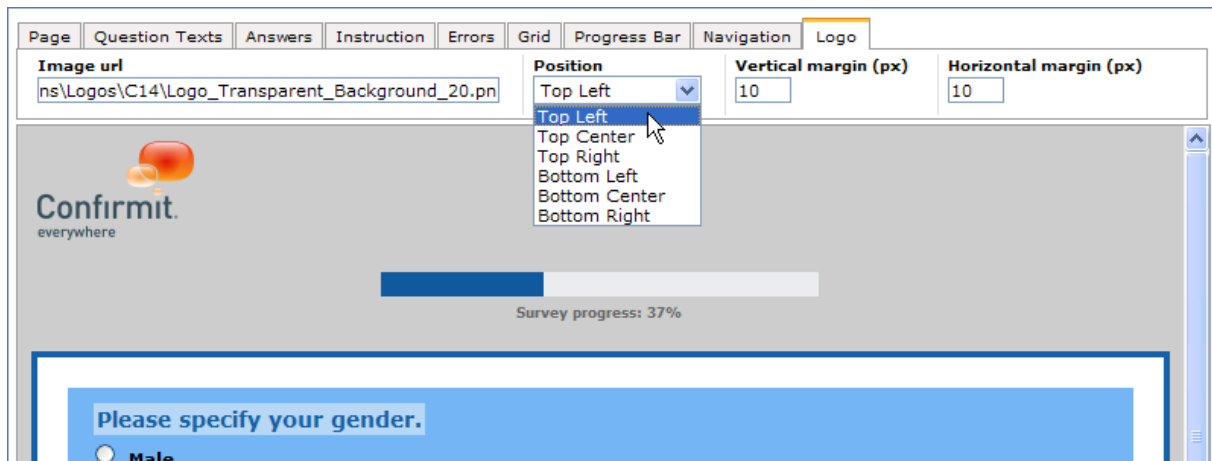


Figure 131 Example of the Logo tab

- 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.

4.11. 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 the Export Survey Definition section on page 145 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 Confirmit 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.

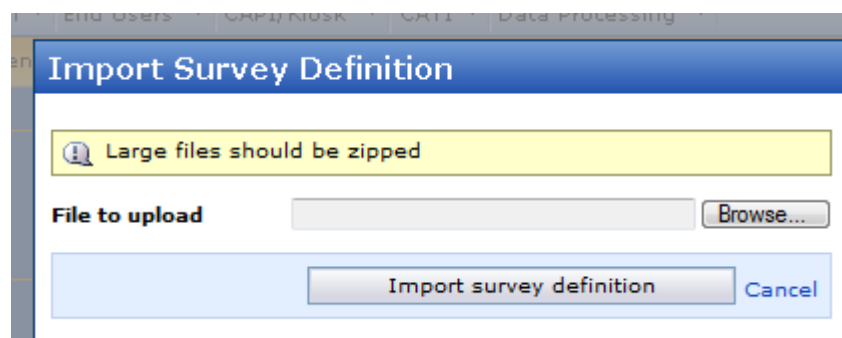


Figure 132 The Import Properties dialog box

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 project in your project 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.

The user may change his/her user settings at any time. To do this, go to the **Home > User > Settings** menu command. The User Settings window opens as shown in the figure below.

Note: Some settings are not available to Standard users.

User Settings

User name usermanual

Change password [\[Change\]](#)

User key [masked] [\[Copy to clipboard\]](#)

First Name Adam

Last Name Apple

E-mail documentation@confirmit.com

Language English

Send email if task aborts ☐

Send email on successful sampling ☒

Subscribe to emailed news items ☒

Hide title and description ☐ Browser will be refreshed

Disable wysiwyg in page editors ☐ Prevent all automatic formatting of page editors in Authoring and Reportal

Use HTTPS connection ☐ Will take effect on next login

VSFlexGrid Pro answer list (ActiveX) settings

Answer list font

Use unicode answer list ☒

Coding screen size 15

[Save and Close](#) [Save](#) [Cancel](#)

Figure 133 Example of the User Settings window

The properties and fields are as follows:

- **User name** – user login name. In combination with a password, this user name will log the user on to the Confirmit application.
- **Change password** – click the link to open the Change Password dialog (see the Password Policy section on page 3 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 really a security issue.) To copy the key, click the Copy to clipboard link.
- **First name /Last name** – the name of the user. Used mainly for interaction with other users.
- **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. This field can be left empty.
- **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 projects.
- **Send email if task aborts** – when a task is aborted (export, import, etc.), a notification will be sent to the user.
- **Send email on successful sampling** – [not Standard user] on successful sampling, an email is sent to the user.
- **Subscribe to emailed new items** - when checked, the user will receive news items as emails.
- **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 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.
- **Use HTTPS connection** – users can themselves control whether Confirmit Authoring is to run on SSL (https://) or not. Choose this property, log off Confirmit and then log in again to effect the change.
- **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.
- **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 The Online Coding Tool section on page 487 for more information).

4.13. Company Settings

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 projects administered by the company.

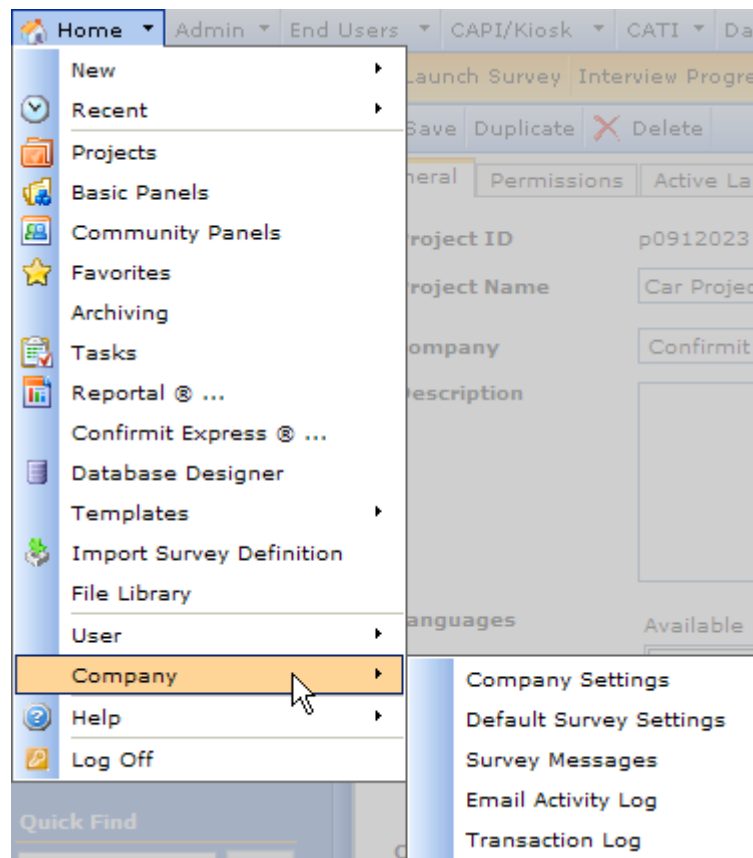


Figure 134 The Home > Company submenu

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, enable database encryption 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 the How to Create Default Survey Settings Templates section on page 370 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.
- **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, and you can specify that any of these languages are to be used by a project. 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 the Survey Messages section on page 143 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 the Company > Email Activity Log section on page 112 for more information). The report can be grouped by date, weekday, week, quarter or all.
- **Transaction Log** - provides a list of the transaction logs available to your company (see the Company > Transaction Log section on page 113 for more information).

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 three tabs:

- Security
- Survey Channels
- 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.

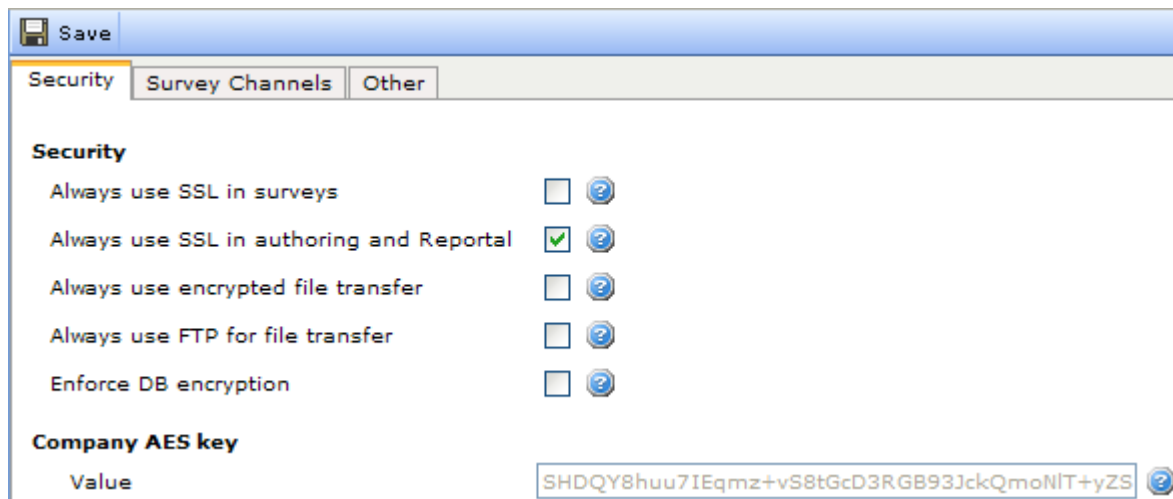


Figure 135 The Company Settings window

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.
- **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.
- **Enforce db encryption** - Check this option to enforce encryption for all new databases created for projects. 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 projects, the projects 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.
- **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.

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 .

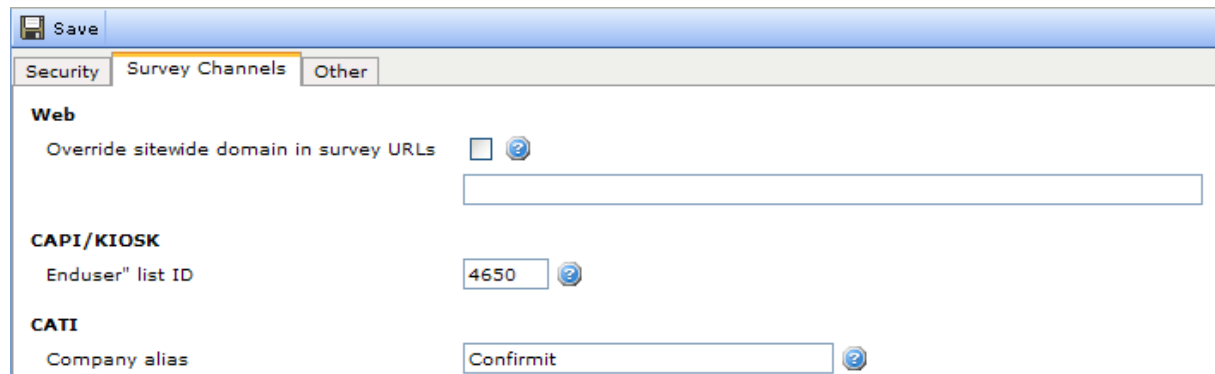


Figure 136 The Company Settings > Survey Channels tab

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. 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 the Using Your Own Domain Name for Confirmit Surveys section on page 362 for more information).

Important:

When typing the domain link into the field, 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 User Guide for further details.

4.13.1.3. 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 .

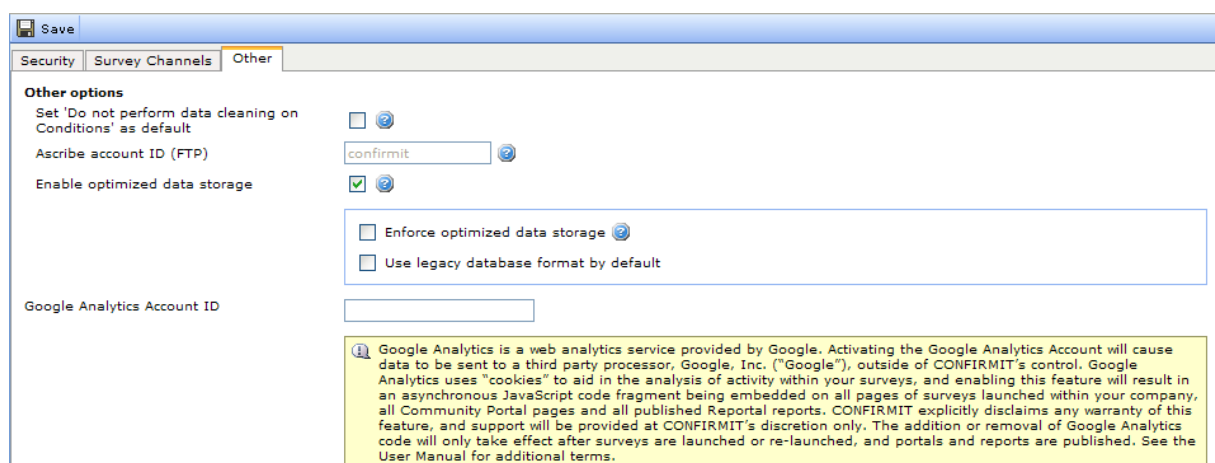


Figure 137 The Company Settings > Other tab

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.
- **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.
- **Enable optimized data storage** - Check this box if you wish the users in your company to have the option of using the Optimized Database format. This activates several more options.
 - o **Enforce optimized data storage** - Enabling this option will enforce that all project 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 projects created, either via the New project menu item, duplication of an existing project or by importing of a survey XML. Any existing projects created in the legacy format will remain in this format even if re-launched.
 - o **Use legacy database format by default** - check this box if you wish your company's users to use the legacy database format by default, whilst having the optimized format available if they wish to use it.
- **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 the Integration with Google Analytics section on page 7 for more information).

4.13.2. 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 project. 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 project for that interval.

Search	Reset
Interval	Month
Interval	Number of emails
December	17
November	27
October	36
March	12
February	995
January	29

Project Id	Number of emails	Number of jobs
p5289675	1	1
p5294606	825	6
p5321464	3	3
p5365185	1	1
p5371870	2	2
p5887101	1	1
p5930621	159	4
p6251596	3	2

Figure 138 Example of the Email Activity Log for February

4.13.3. Company > Transaction Log

This menu item provides the company administrator with a list of the transaction logs available to the company.

1. Go to the **Home > Company > Transaction Log** menu command.
The Transaction Logs page opens, with a list of the logs available.
2. Click on a blue **Name** link to open that log.
The Transaction Log Detail page opens at the General tab. This tab shows information about the log, such as who created it and when.

Back	Company	Confirmit	From	22/11/2009	To	22/03/2010	View Report

General	View

Report name	TransactionLogs
Description	
Created by	marlung
Created date	15/03/2010 09:48:14
Modified by	marlung
Modified date	18/03/2010 13:06:59
Size	42 kb
Cube last processed	
Cube state	

Figure 139 Example of the Transaction Log Details page General tab

The Company field lists all the companies to which you have access.

3. Click the down-arrow and select the company you are interested in.

4. Select the dates for the period for which you wish to view the transactions.
5. Go to the View tab to view the transactions.

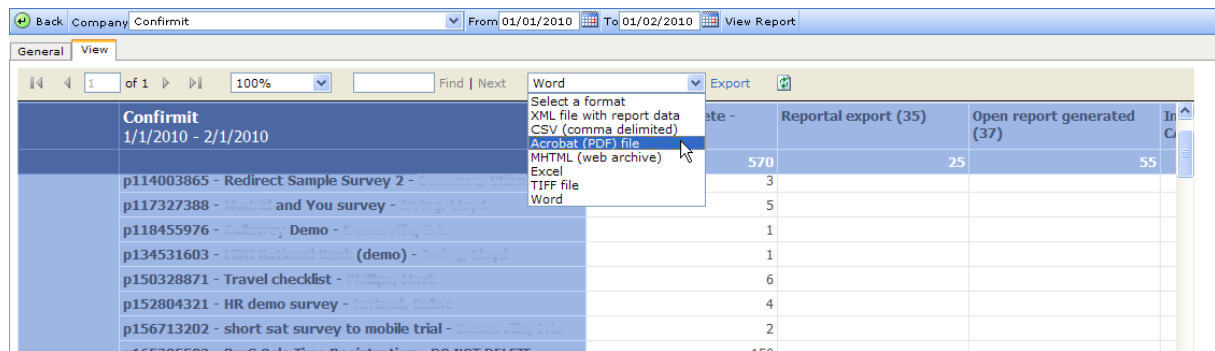


Figure 140 Example of the Transaction Log Details page View tab

If you change the dates or company, click **View Report** to update the information displayed.

If you wish to export the report, select a format to export it to, then click the **Export** button. A standard download Open/Save dialog opens. Click as appropriate and view/save the export file.

4.14. Help

Go to the **Home > Help > Help Topics** menu command. A new window named Confirmit Help opens. This window has three links in the toolbar:

- **Support** – opens the Support page containing information about our support conditions and direct links to Confirmit Support Center.
- **User Manual** – opens the User manual page. This page contains two links, to the Confirmit User manual and to the Confirmit Reportal manual. Click on the appropriate link to open the manual. The documents are indexed, searchable and have internal linking. For example, if you click on a topic in the Table of Contents, you are taken directly to the topic.
- **Layout** – includes links to Color Chooser and HTML colors.

In addition:

- **Home > Help > Confirmit extranet** – is a direct link to the customer extranet. Customers with server installations may choose whether they want to have access to our extranet, or to have the last updated Help page in Confirmit on their server.
- **Home > Help > Public PGP Key** - opens a page with the public PGP encryption key for the user (see the Data Transfer Encryption and FTP section on page 4 for more information).
- **Home > Help > Language overview** – opens a list of the languages that are available on the On-Demand server. Note that the same list is included in Appendix B in this User Manual.
- **Home > Help > 3rd Party Software** - opens a page listing the 3rd-party software in use in Confirmit, and any restrictions and attributions applicable.
- **Home > Help > About** – information about the Confirmit build you are using.

(see the Getting Help section on page 16 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 projects and reports. This will avoid the problem of for example a logo suddenly no longer being visible in a project because a link has changed.

Note: The File Library functionality is not available for Standard users.

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.

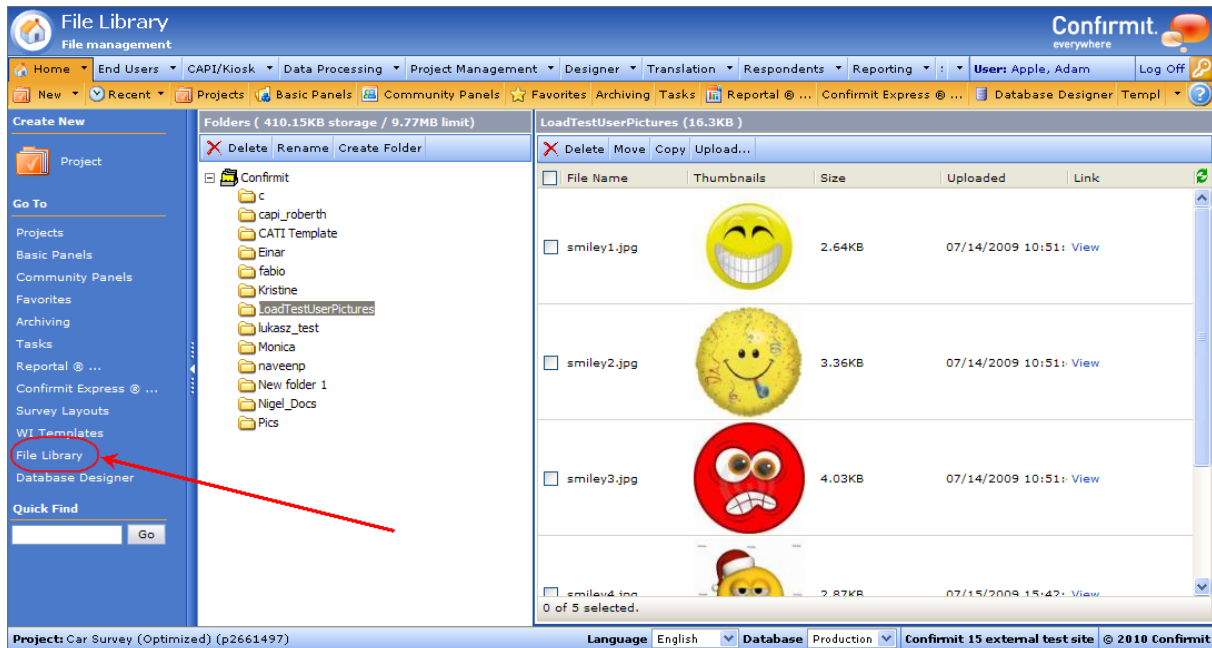


Figure 141 Example of a File Library folder

Note: The default size of the free-of-charge storage space is 256 KB at Company level. On-Demand Clients can request additional space to be allocated (fees apply). Contact your Account Manager at Confirmit, or send an email to support@confirmit.com. On-Premise clients must contact their Confirmit server manager.

5.1. Limitations

- The default size of the free-of-charge storage space is 256 KB at Company level. On-Demand Clients can request additional space to be allocated (fees 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 On-Demand Clients, you are only allowed to refer to files in File Library from surveys or reports running on the Confirmit On-Demand Environment.
- In the Confirmit On-Demand 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 On-Demand 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 users within a company. 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.

Three user types are available:

- **Standard** - allows upload of jpg, gif, bmp, jpeg, tif and png files.
- **Enhanced** - allows upload of jpg, gif, bmp, jpeg, tif, png, css, htm, html, js and swf files.
- **Multimedia** - allows upload of jpg, gif, bmp, jpeg, tif, png, css, htm, html, js, swf, avi, mpeg, wmv, mpg, and rm 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.

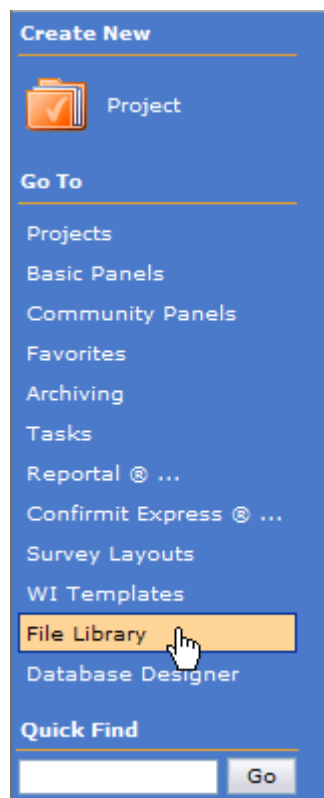


Figure 142 Accessing the File Library via the Quick Access pane

When you enter the File Library for the first time, you are presented with the following screen.

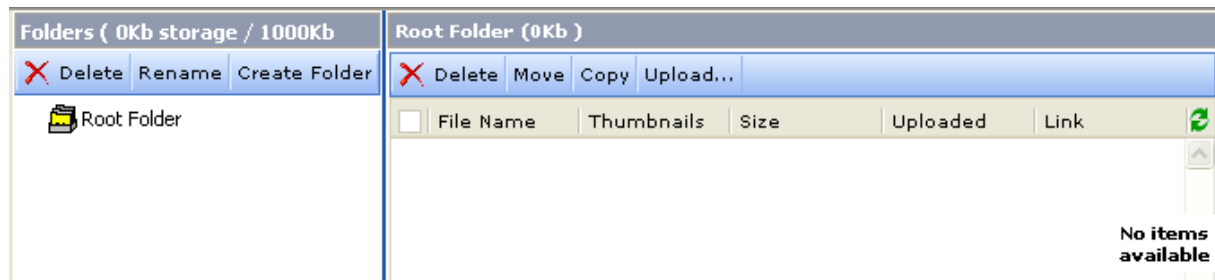


Figure 143 An empty File Repository

- 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. How to Upload Files to the File Library

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.

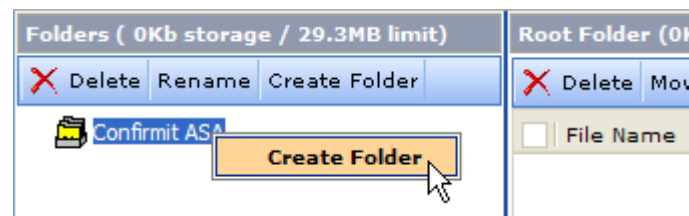


Figure 144 Creating a new folder

A new folder is created and activated.

Give the folder a descriptive name, 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.

Note: Never use blank space in the folder name. If you wish to create space between parts of the folder name, use underscore (_).

2. 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.

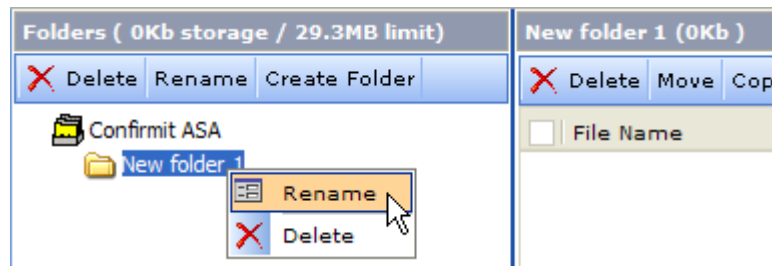


Figure 145 Renaming the new folder

Note: The following characters must not be used in the folder names in the File Library: + % / \ ? # \$ & * | : " < > . Space

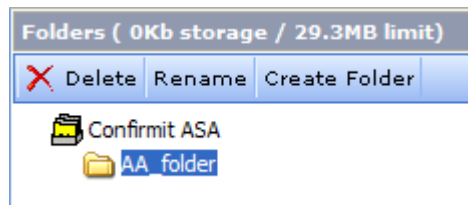


Figure 146 The renamed folder

The folders you create are displayed in the Folders frame.

To upload a file into a folder:

3. Double-click on the name of the folder into which you wish to upload the file name to activate the folder.
If you wish to upload a file to the Root Folder level, double-click on the Root Folder name.
4. Click the **Upload** button.
A third frame opens (see the figure below).
5. Browse to the files you wish to upload, then click **Upload**.
You can select and upload up to five files simultaneously.

AA_folder (0Kb)

✖ Delete Move Copy Upload...

☐	File Name	Thumbnails	Size	Uploaded	Link
No items available					

0 of 0 selected.

Upload Files to "AA_folder" folder

Select files with allowed extension (jpg; gif; bmp; jpeg; tif; png; css; htm; html; js; swf; avi; mpeg) to upload.

File 1

File 2

File 3

File 4

File 5

☐ Overwrite file(s) with identical file name(s) in destination folder.

Figure 147 Uploading files

The files will be uploaded and displayed in the upper 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 (_).

AA_folder (286.06Kb)

✖ Delete Move Copy Upload...

☐	File Name	Thumbnails	Size	Uploaded	Link
☐	BushVaca.jpg		105.1Kb	11/11/2008 11:45:14	View
☐	DSCF0005.JPG		45.43Kb	11/11/2008 11:37:36	View
☐	image011.jpg		20.22Kb	11/11/2008 11:45:15	View
☐	image015.jpg		29.08Kb	11/11/2008 11:45:15	View

Figure 148 Example of uploaded files

The volume of the storage space used is specified in the gray bar at the top of the frame. In the example in the figure above, the files have used 106 kb.

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. 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.

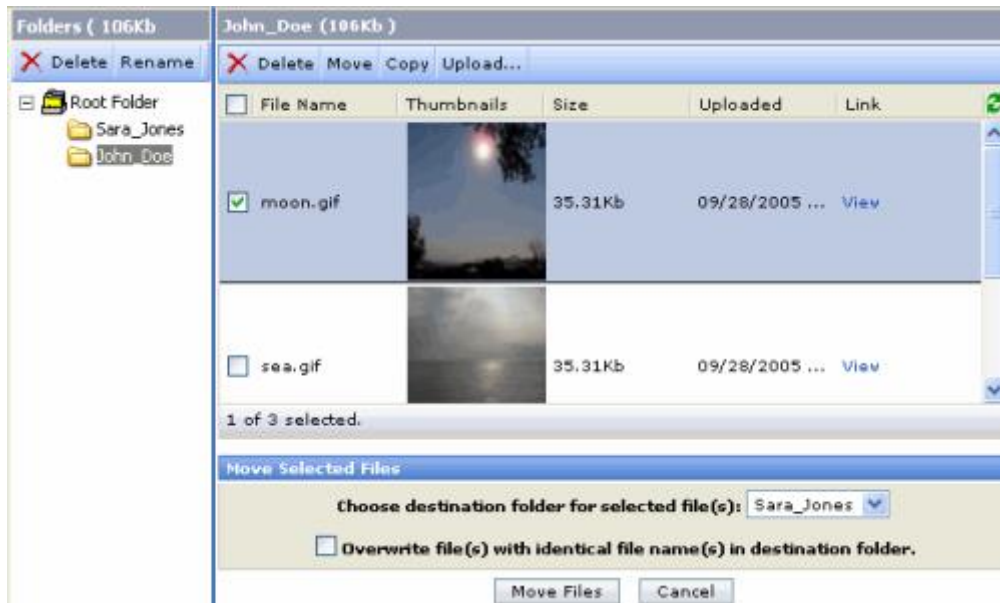


Figure 149 Moving files

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.

5.5. 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 projects. 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 the How to Include an Image in a Text Field in HTML Source Mode section on page 121 for more information). For the Answer fields, you can drag-and-drop the images directly from the File library (see the How to Include an Image in WYSIWYG Mode section on page 121 for more information). Once an image is in a field, you can resize it and delete it as necessary (see the How to Resize and Delete an Image section on page 126 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.

5.5.1. 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.

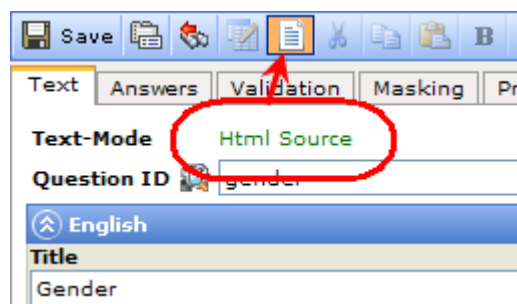


Figure 150 Select the HTML Source mode

3. In the field in which you want the image to appear, type the following:

```

```

Note that you can copy the URL from the File Library. To do this, click the **Copy** link for the appropriate file in the File Library folder, then paste the link URL into the appropriate text field.

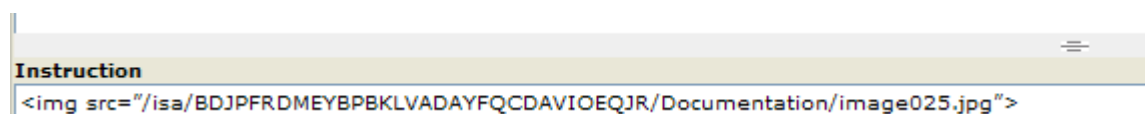


Figure 151 Example of the HTML URL code to an image in the File Library

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. 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.

5.5.2. 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). If not, click the **Switch between WYSIWYG mode and HTML Source mode** button arrowed to the right in the figure below. If you are in the Answers tab and this button is not active, click the **Switch answer list mode** button (arrowed to the left in the figure) to activate the **Switch between...** button.
3. Once you are in the WYSIWYG mode, right-click in the appropriate text field, and select **Find Image**.

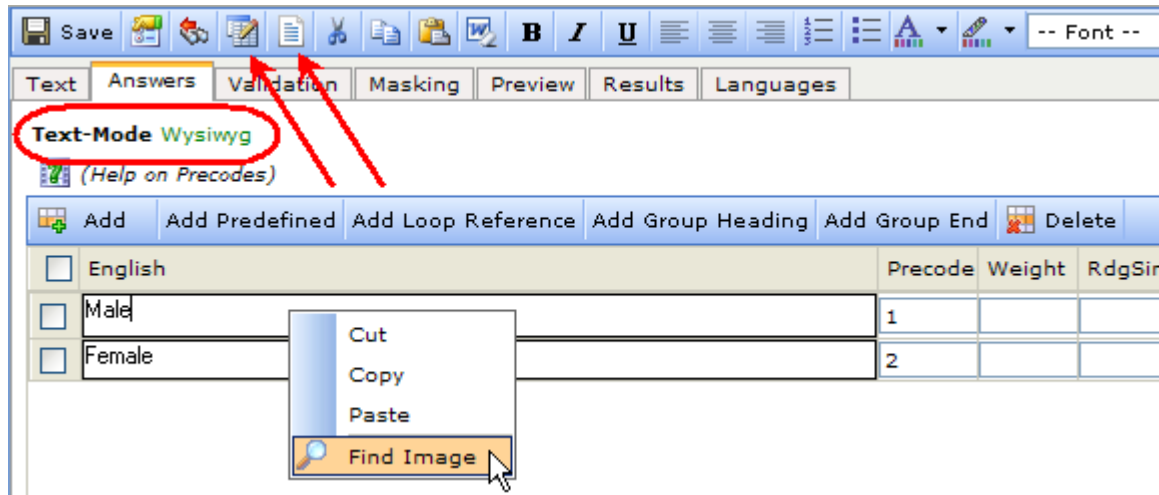


Figure 152 Select the WYSIWYG editing mode then find the image

The File Library window opens below the question form in the Root Folder, as shown below.

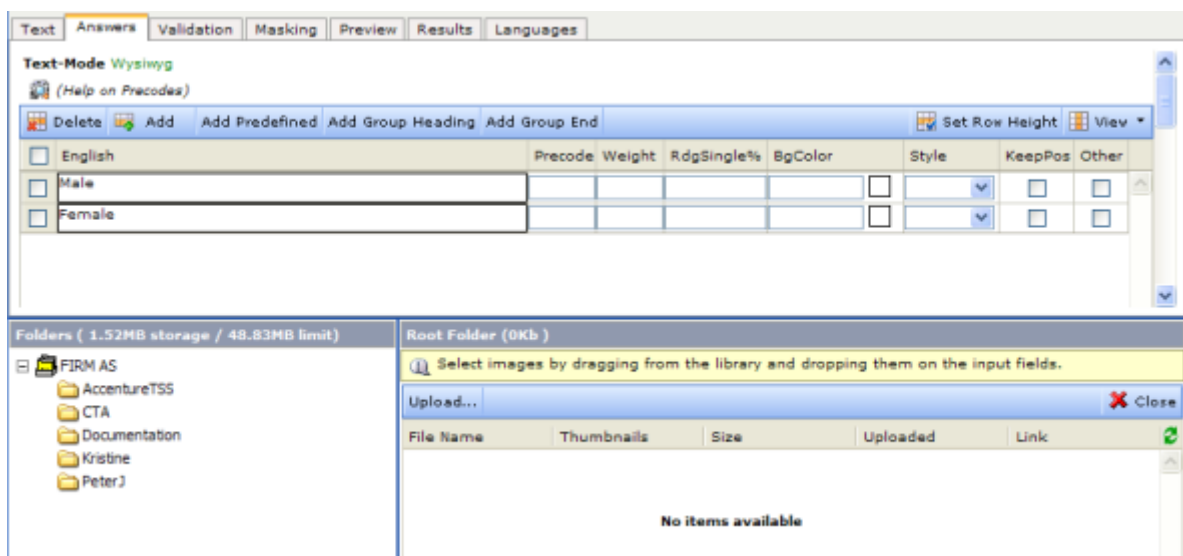


Figure 153 The question form with the File Library open below

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.

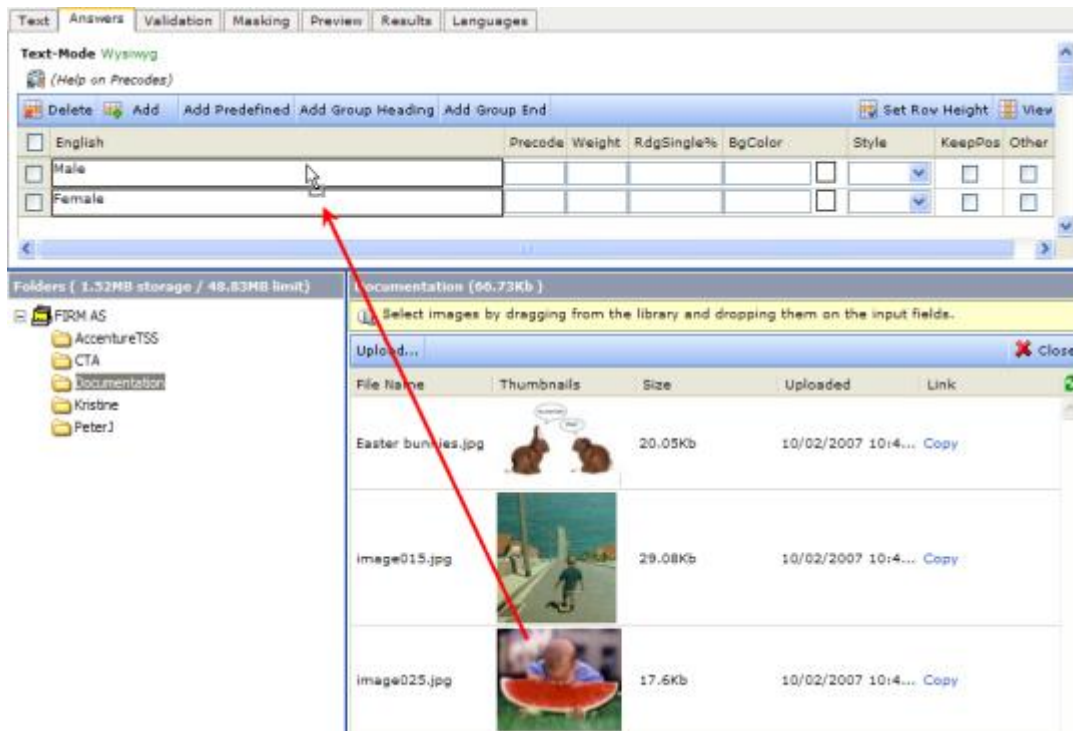


Figure 154 Dragging an image into the Answer field

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 the How to Include an Image in a Text Field in HTML Source Mode section on page 121 for more information)

5.5.3. 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.

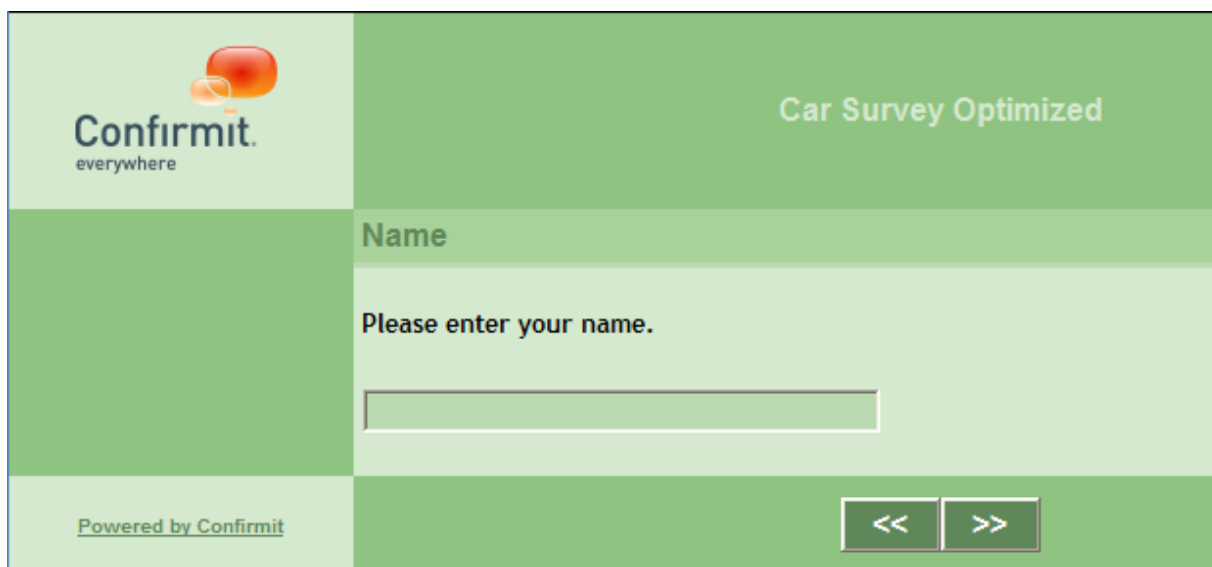


Figure 155 Example of a logo placed in a Theme such that it appears on every page of the survey

Proceed as follows:

1. To ensure the image will always be available, archive the image file in the File Library (see the How to Upload Files to the File Library section on page 117 for more information).
2. In the File Library folder, click the **View** link for the image you wish to add to the Theme.

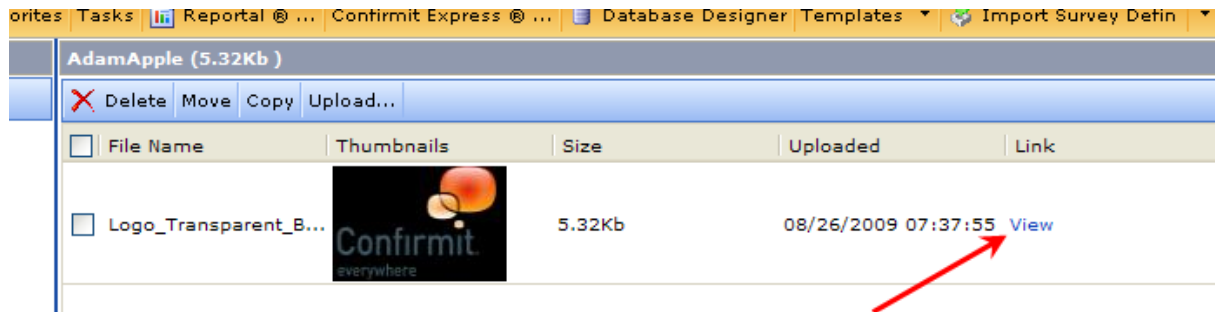


Figure 156 The View link in the File Library folder

This opens the Relative Link window.

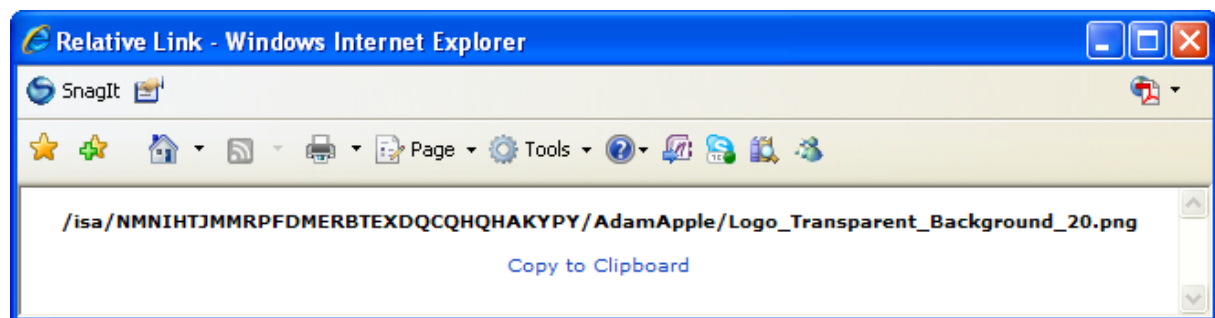


Figure 157 The Relative Link window showing the URL to the image file in the File Library

3. Click the **Copy to Clipboard** link to copy the URL to the clipboard.
4. Open the project 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 the Themes section on page 59 for more information).
6. Place the cursor 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.

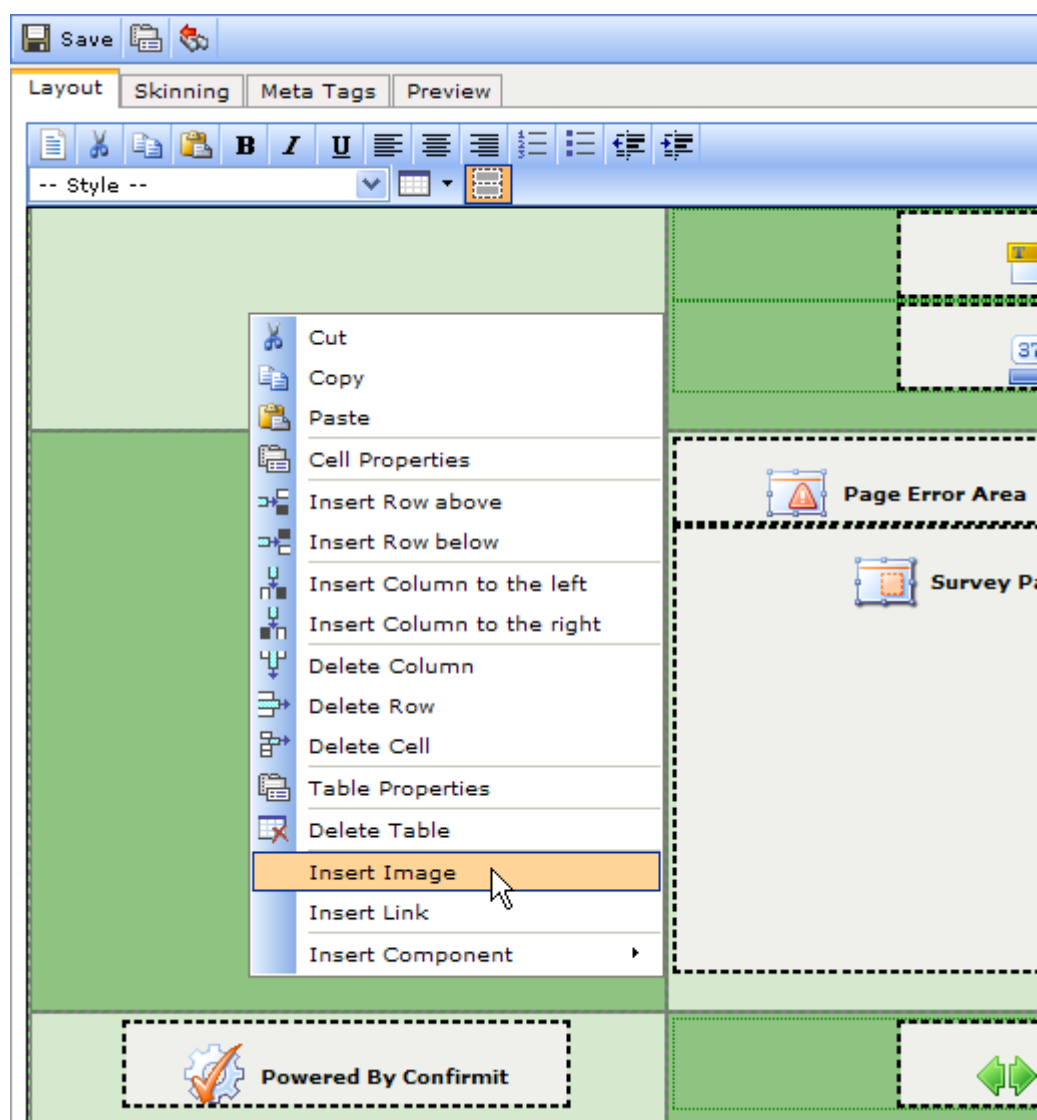


Figure 158 Selecting Insert Image

The Properties page opens.

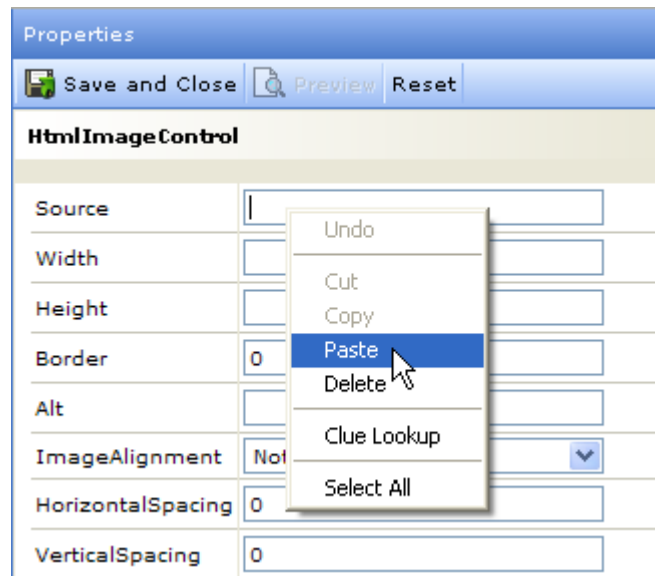


Figure 159 Pasting the URL into the Source field

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.
10. Test the survey to ensure the result is correct (see the Quick Test section on page 339 for more information).

5.5.4. 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.

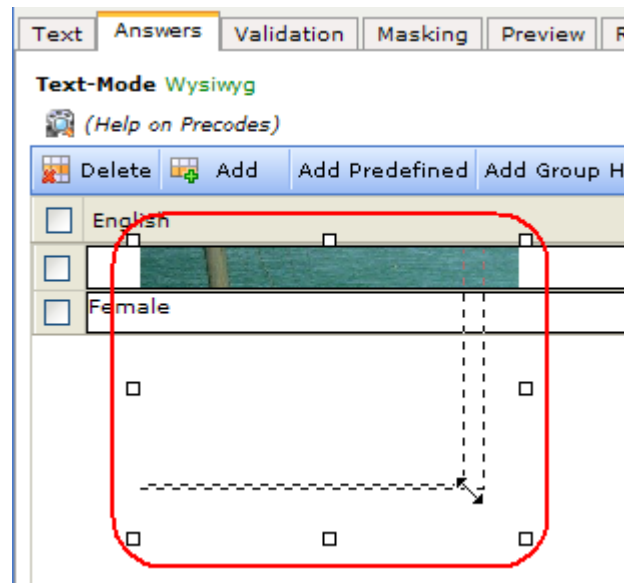


Figure 160 Resizing an image on the Answers tab

- 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.

5.6. 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 project number if the files are to be used only in this one project, 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: + % / \ ? # \$ & * | : " < > .

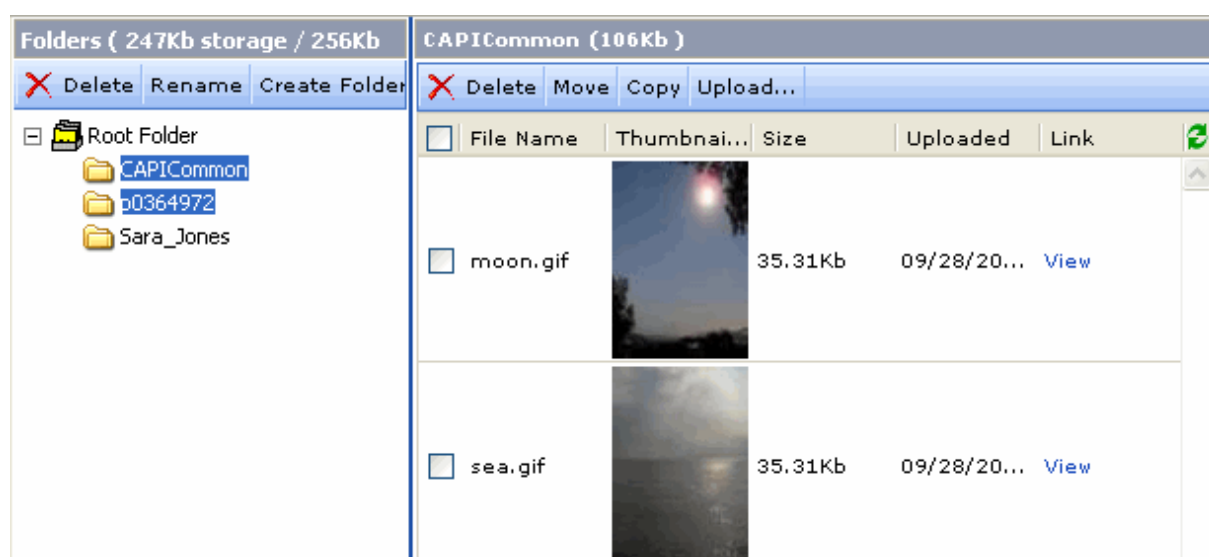


Figure 161 Files Used in CAPI Surveys

6. Project Management

The Project Management page and associated menu items enables you to set up your survey as required. The following sections describe each Project Management area in more detail.

Note: The Standard user has a simplified Project Management page (see the Standard Users section on page 139 for more information).

6.1. Overview

The Overview page for a project provides you with information about the project. This is the first page that opens when you create a new project (see the Creating a New Survey section on page 149 for more information). To open the Overview page, go to the **Project Management > Overview** menu command. The page opens at the General tab.

The following sections describe the tabs on this page.

6.1.1. The General Tab

When you go to the **Project Management > Overview** menu command, the Overview page opens at the General tab, an example of which is shown below.

Note: Standard users have reduced Project Management functionality (see the Standard Users section on page 139 for more information).

Project Overview
Set the details for the current project

Home End Users CAPI/Kiosk CATI Data Processing **Project Management** Designer Respondents Reporting Survey Data User: Apple, Adam Log Off

Overview Survey Settings Permissions Interview Progress Survey Messages Export Survey Definition Quota Targets Project Log Flex Extensions

Create New
Project

Go To
Projects
Basic Panels
Community Panels
Favorites
Tasks
Reportal @ ...
Confirmit Express @ ...
Survey Layouts
File Library
Database Designer

Quick Find
Go

General Project Status Url Setup

Project ID p0438562

Project Name Car Project for Documentation

Company Confirmit

Description

Languages

Available: Afrikaans, Albanian, Arabic, Arabic (Algeria), Arabic (Bahrain)

Selected: English, Norwegian

Categories and Keywords

Available Categories: Template, Benchmark, Library, Registration Project, Update Profile Project

New Keyword Add

Creator Apple, Adam

Created 07.12.2010 09:30:40

Last Modified 17.12.2010 09:11:40

Status production

Deployment WI (public)

Panelist registration - /update profile project ☐

Community Panel Allow current survey to access Find Panel... Clear

Email address to receive emails triggered by scripting errors in interview Nigel.Bennett@confirmit.com

Data Storage Optimized format

Use database encryption ☐

Project Titles

English

Norwegian

Project Info Fields

Start date

End date

FieldA

FieldB

Administrator Info

Complete responses	0
Incomplete responses	0
DB server name	co-osl-tst063
Size of DB data	0 MB
Size of DB log	0 MB
Questionnaire last modified	-
WI last generated	-
DB last generated	-
Last response	-
Project info last updated	-

[Project tasks]

Figure 162 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 the Confirmit Express section on page 147 for more information).

The fields are as follows:

- **Project ID** – system-generated unique identification number. This is created when the survey is created, and cannot be changed.
- **Project 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 The Project Titles and Info Fields section on page 131 for more information).
- **Company** – your company's name.
- **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 the How to Edit a Survey Message section on page 144 for more information).
- **Categories and Keywords** – you can categorize surveys. There will be three predefined categories: Template, Library, and Benchmark for Reportal benchmark functionality (see the Reportal User Manual for further details).

Note: Modules and Templates in Confirmit 8.5 libraries will automatically be converted to the new categories. The Templates will also be available when creating New Surveys.

Note: If you have the Community 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 Community 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 The Project Status Tab section on page 136 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.
- **Dashboard URL** - the Survey Dashboard provides information about a survey to users without them having to login to Confirmit Authoring. In this initial release, some basic statistics can be accessed through a touch device and through a standalone browser (see the The Survey Dashboard section on page 133 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 The Inline Survey Options section on page 358 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 the Enabling External Test Access section on page 375 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 project** - 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 regular data collection (research projects/surveys). If this box is checked for a project, it will be registered in the project log.
- **Community Panel** - if the survey is to use a Community Panel, browse to the panel here.
- **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 the Email Address to Receive Emails Triggered by Scripting Errors in Interview section on page 130 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 The Optimized Database Format section on page 31 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.

If any Recurring tasks are set up for the survey, a **Recurring tasks** link will be displayed at the bottom of this page.

The **Project tasks** link will be displayed to users with Administrative 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.

A number of fields are displayed in the right column of the page. These are described in the following sub-sections.

6.1.1.1. 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 project ID, the title of the project, 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.

```

Sorry, but the system has encountered an internal error and cannot go on
with the interview at this stage.

Please check back later.

** Error info **
Date       : Mon Apr 02 13:04:35 GMT+02:00 2001
Project    : p17178137 (Peakstate6248;tc)
Respondent : 2

** Form data **
t__state=3&c=2&a=JUTXQID0&q1=1&q9=1&l=9&direction=++%3E%3E++

** Error description **
java.lang.RuntimeException: Problem with conditional expression:
f('q1') == '1'
java.lang.RuntimeException: Expected '}'

```

Figure 163 Example of the Test Mode error message

6.1.1.2. The Project Titles and Info Fields

These fields allow you to edit the project titles in the various project languages, and to set the project start and end dates.

Project Titles

English
Car Survey

Norwegian
Bil Undersøkelse

Project Info Fields

Start date 06/10/2008

End date 08/10/2008

Figure 164 The Project Title and Info Fields

- **Project Title** - The title of the project in the various project languages. When a Project 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. Project Title takes priority over Project Name (see the The General Tab section on page 128 for more information) when Project Title is provided for a language, but if no Project Title is provided for a language then the Project 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 project will not close automatically on this date. You must close the project manually in Project Status (see the The Project Status Tab section on page 136 for more information).

6.1.1.3. The Administrator Info Field

This field displays read-only information on the current state of the survey and data.

Administrator info	
Complete responses	
Incomplete responses	
Size of database data	
Size of database log	
Questionnaire last modified	
WI last generated	
DB last generated	
Last response	
Reporting last accessed	
Project info last updated	
Data growth last day	
Log growth last day	
Data growth last week	
Log growth last week	
Data growth last month	
Log growth last month	
Refresh	

Figure 165 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.
- **Size of database data** - Current size of database data.
- **Size of database 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.
- **Reporting last accessed** - Last time someone accessed the Online Reporting module.
- **Project info last updated** - The last time all the project 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).

6.1.1.4. The Check Growth Field

This field enables you to check the size and growth of your survey data.

Figure 166 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.

6.1.1.5. The Survey Dashboard

The Survey Dashboard provides information about a survey to users without them having to login to Confirmit 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 **Project Management > Overview** page General tab (see the The General Tab section on page 128 for more information). Note that the information presented in the dashboard is taken only from the Production database.

You can access the URL using an iPhone, Android or Blackberry device, and login to the application using your Confirmit username and password.

Figure 167 The Dashboard Login page

- 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.
- After you have logged in the Recent Surveys list will be displayed. This is the same list as is on the Authoring **Home > Recent** drop-down, and it is presented with the "last accessed" project at the top of the list. Note that this will only include projects and Basic Panels; not Community Panels.

Recent Surveys		
■ Car Survey Optimized 2	(p1669090)	>
■ Car Survey Optimized	(p1052575)	>
■ DocPoll1	(p1684920)	>
■ Linear Regression 1	(p1348464)	>
■ Documentation User Survey	(p0174300)	>
■ Test Copy of Documentation User Survey	(p0040583)	>
■ Newspaper Survey for CAPI - Optimized	(p1072000)	>
■ DocTestPanel1	(p0775029)	>
		Log Off

Figure 168 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 in a project row in the list to display statistics for the survey. Note that if the project database has not been created, then a message will be displayed informing you of this fact.

Car Survey Optimized		
Surveys	Report	Quotas
Response Rates		
	Total	%
Total respondents	0	
Response rate (completed interviews)	0	0,00%
Respondents emailed	0	0,00%
Interviews not started	0	0,00%
Respondents opted out	0	0,00%
Interview Progress		
	Total	%
Complete	0	NA
Incomplete	0	NA
Screened	0	NA
QuotaFull	0	NA
Error	0	NA
Total interviews started	0	NA
Incidence Status		0,00%
Survey status: Open		Close Survey
Surveys		Log Off

Figure 169 Example of the statistics displayed for a survey in the dashboard

- When viewing a project's statistics, click on the **Surveys** links at the top and bottom of the page to return to the Recent Projects page.
- Users with the appropriate permission can open or close the survey by clicking the button in the lower-right corner. The button is named and color-coded accordingly.
- If the survey contains quotas, the **Quotas** button is accessible in the upper-right corner. Click this to open the Quotas page. This provides read-only access to the quotas in the survey. A Quota drop-down 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.

q3 (Single)	Limit	Count
Male	20	0
Female	20	0

Figure 170 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 project.
- Click **Report** to view a reduced-functionality Rapid Results style page.
- Click **Log off** to log off and close the dashboard.

6.1.2. The Project Status Tab

Use this tab to set the project status.

Figure 171 The Project Status tab

The tab has two options:

- **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.

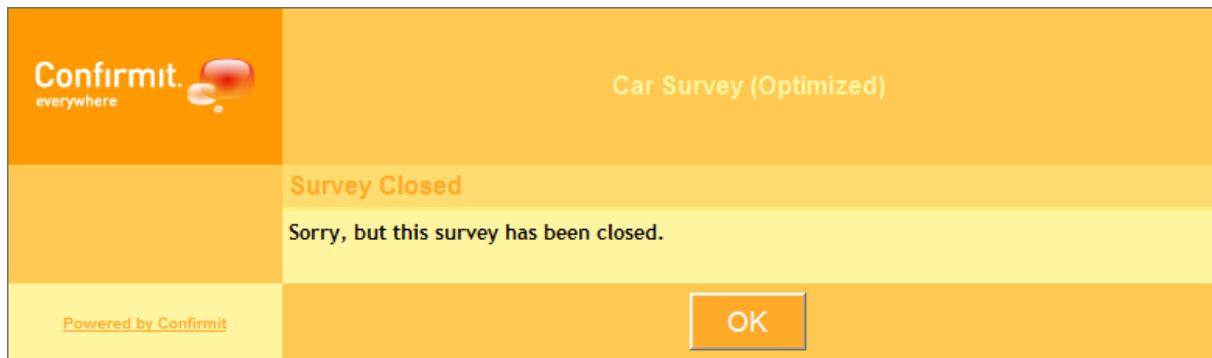


Figure 172 Survey Closed Message

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 project and choose *Create new database*. This action will delete all response data.

Note: When a project is closed, any recurring tasks that are still running will be disabled (see the [The Task Properties Recurrence Tab](#) section on page 47 for more information). If the project is later re-opened, the user can go to the task and re-start it as necessary.

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.

End links		
Language	URL	Link preview
English		
Norwegian		

Help links			
Language	URL	Text	Link preview
English			
Norwegian			

Figure 173 The URL Setup tab

The fields 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 project 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 project 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 Project

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 project is created and opened. The copy is given the name "Copy of [original project name] (new project 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. Deleting a Project

To delete a project:

1. Go to the **Project Management > Overview** menu command.

The Overview page opens.

2. Click the **Delete** button.

A confirmation message is displayed.

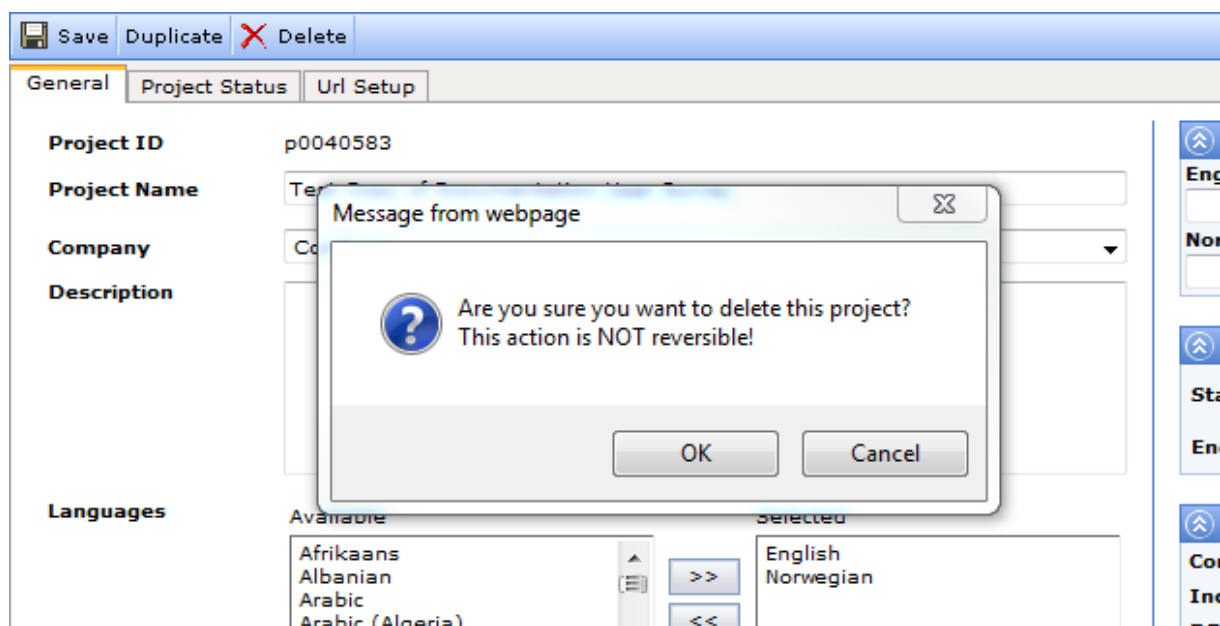


Figure 174 Deleting a project

3. Click **OK** to delete the project, **Cancel** to abort the process.

Note: This action cannot be reversed. Once you click OK in the confirmation box, the project will be deleted and cannot be "undeleted".

Note: If you delete a project in Authoring, any Reportal report that uses the project as it's only data-source will also be deleted.

6.1.6. Recurring Tasks

If one or more recurring tasks are defined in a project (published reports, emailing, etc.), a link leading to Task Management will be displayed. The number of recurring tasks existing in the project will be stated.

6.1.7. Standard Users

Standard users have reduced Project Management functionality, and see the Survey Details tab instead of the normal General tab.

The screenshot displays the 'Project Overview' page for a Standard user. The top navigation bar includes 'Home', 'Project Management', 'Designer', 'Respondents', 'Reporting', 'Survey Data', and 'User: Apple, Adam'. The left sidebar has 'Create New' (Project), 'Go To' (Projects, Favorites, Archiving), and 'Quick Find'. The main content area shows the 'Survey Details' tab with fields for 'Survey status' (Design), 'Name' (Doc Standard Project 1), and 'Description'. The 'Deployment' section shows 'Link to survey' and 'Survey type' as 'Not yet deployed'. The bottom status bar shows 'Project: Doc Standard Project 1 (p0171211)', 'Language: English', and 'External test site for Confirmit Boomer'.

Figure 175 Example of the Project 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 The URL Setup Tab section on page 137 for more information). On this page you can also duplicate the survey (see the Duplicating a Project section on page 138 for more information), and delete it (see the Deleting a Project section on page 138 for more information).

Note that surveys created by Standard users will normally only have one project 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 the Survey Deployment by a Standard User section on page 380 for more information). Once the survey has been launched, the Survey Status field will be editable.

6.1.8. Permissions

For all projects, the user who creates the project is the project administrator and owner, and a project is initially invisible to all other Confirmit users. All Confirmit users in your organization will be listed in the Permissions page, and the project administrator can give other users permission to view the new project.

Note: Standard users cannot add or remove other users, and the types of permissions they can allocate are restricted.

Go to **Project Management > Permissions** to open the page shown below.

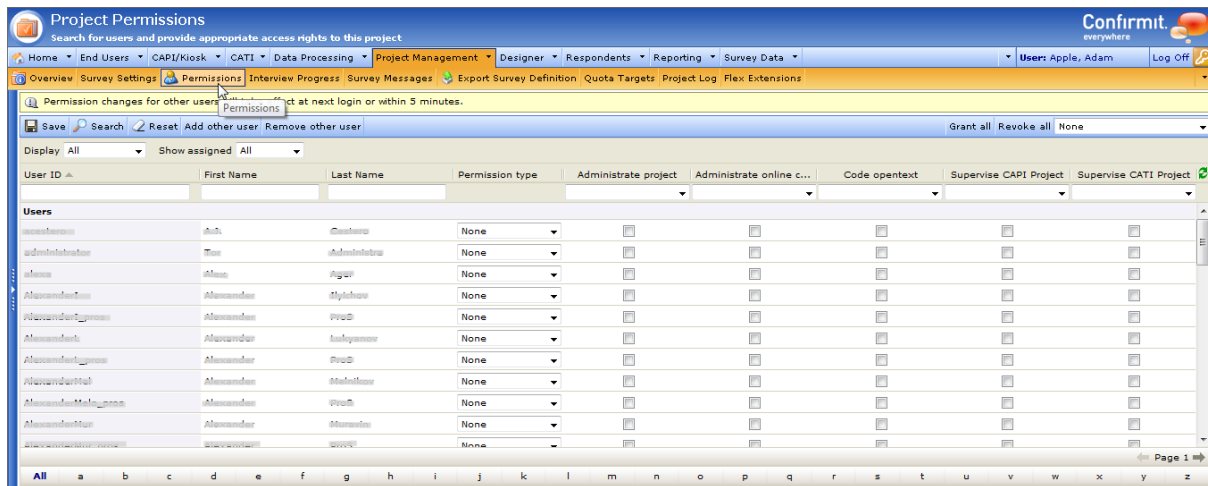


Figure 176 Example of the Permissions page

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:
 - o **None** - the user does not have access to the project.
 - 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.
- **Administrate project** - The user is the administrator and owner of the project. He/she may alter the questionnaire, set the project live, check response status, etc., as well as delete the entire project This is usually the person who initiates the project.
- **Administrate Online coding** - [not Standard user] The user has permission to administer the Opentext coders for the current project. Note that when the project is created, this permission will be given automatically to the project creator.
- **Code Opentext** - [not Standard user] The user has permission to code open-ended questions in the current project (see the The Online Coding Tool section on page 487 for more information).
- **Supervise CAPI Project** - [not Standard user] the user is a CAPI Supervisor (see the The CAPI/Kiosk Options Tab section on page 363 for more information). See also the CAPI User Guide.

- **Supervise CATI Project** - [not Standard user] the user is a CATI Supervisor (see the CATI section on page 482 for more information). See also the CATI User Guide.

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 project by the project administrator. See the following section.

**On-Demand 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.

6.1.8.1. 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 Project Permissions page.

The Add other users overlay opens.

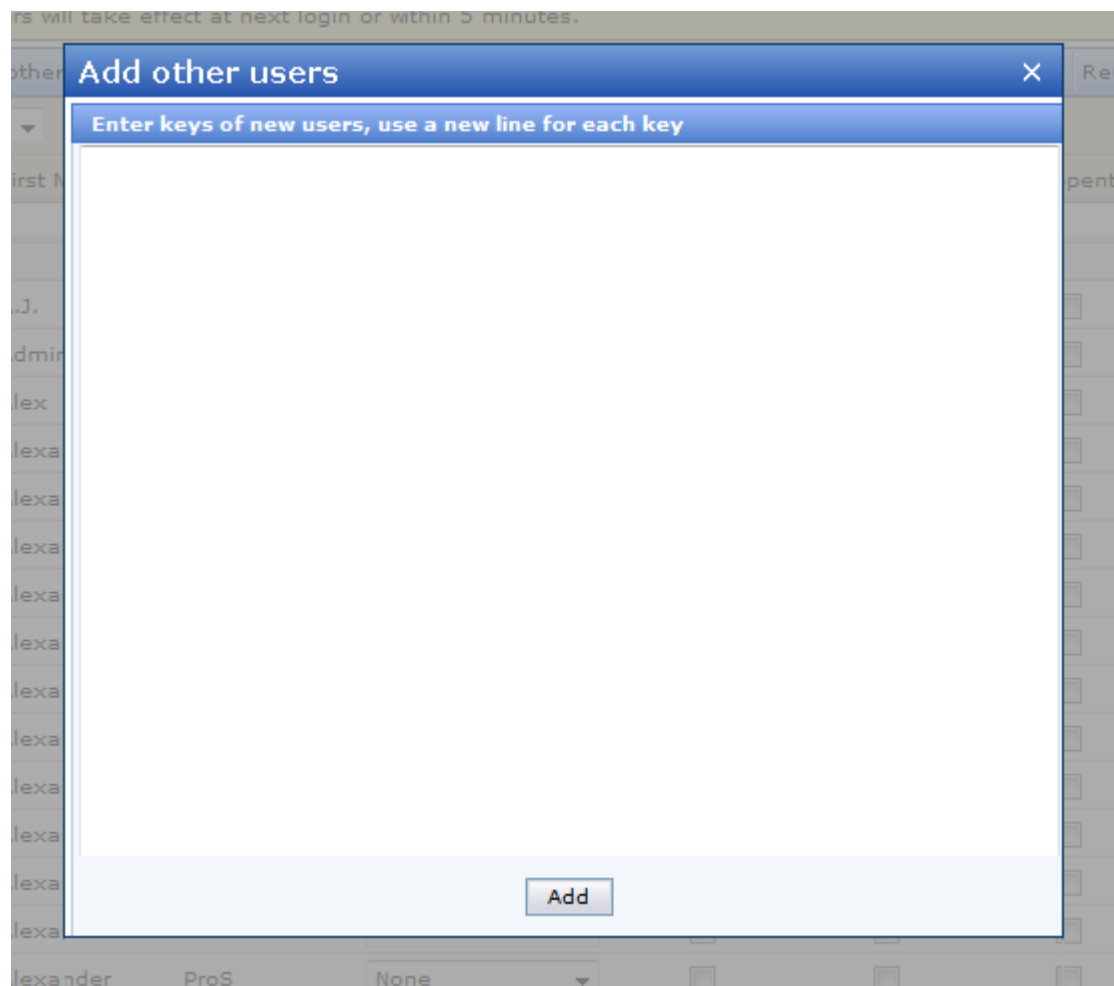


Figure 177 The User Key Entry window

- Paste the key into the overlay window.

Note: Make sure you do not have any space after the last character in the user key.

- 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.

6.2. Interview Progress

The **Project 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 project's test database.

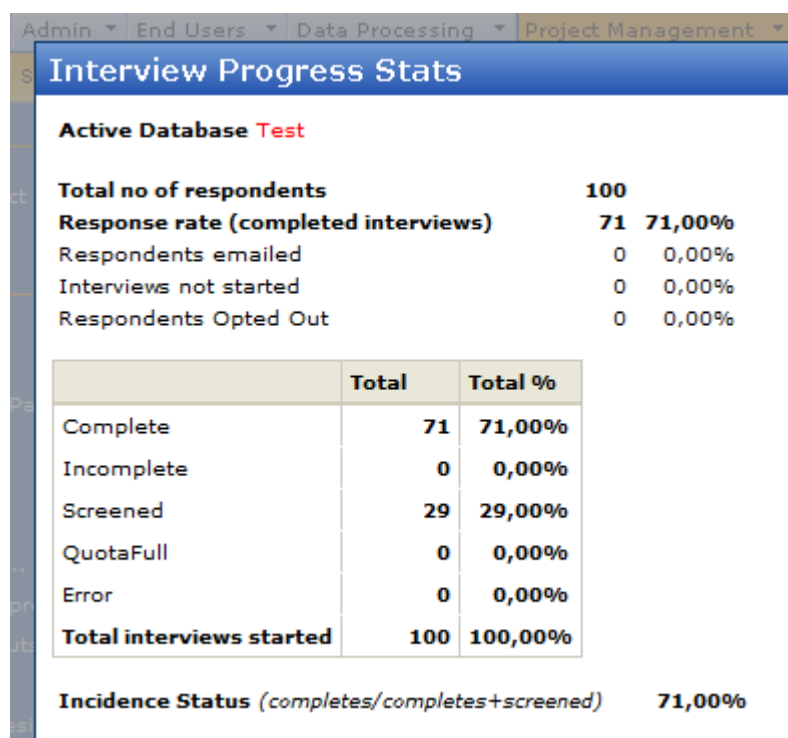


Figure 178 Example of an Interview Progress overlay

- 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.
- **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.

6.3. 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, and you can specify that any of these languages are to be used by a project (see the The General Tab section on page 128 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 Settings section on page 108 for more information). Editing the messages is described below, and this level is also described in the Confirmit Administrator Manual.
- **Project level** - available to the project supervisor via the **Project Management > Survey Messages** menu command. Editing the messages is described below.

Note: Messages edited at the Project level override any edited at the Company or Site level.

The Survey Messages form is as shown below.

Figure 179 The Survey Messages form

Note: If a project containing edited message texts is duplicated, the edited message texts will be included in the new project.

6.3.1. How to Edit a Survey Message

To edit a survey message:

1. Open the project you wish to work with and go to the **Project Management > Survey Messages** menu command.
The Project 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 project is available in several languages, select the message language you wish to edit.
For example, if the project is available in English and French, you can edit just the messages that will appear for English-language projects, just the messages that will appear for French-language projects, or both.
4. Edit the message text as appropriate.

"Finished" page title

Current text: Survey is Done!	← Original message text provided by Confirmit
Edit local text: You have now completed the survey.	← The new message that will be displayed for this survey when it is presented in English →

English

Back to top

Figure 180 Editing a message text

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

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 project is duplicated, any edited message texts will be included in the new project.

6.3.2. 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 then 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.

A1 fx WI_FINISHED_TITLE	
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 <n>nt Press OK to continue

Figure 181 Example of the messages copied into Microsoft Excel

- 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.

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

6.3.3. Clearing Edited Texts

In the event you wish to remove all the edited message texts for a project and return the message texts to their "standard" forms:

- Click **Clear All Texts**.
A confirmation dialog box is displayed.
- Click **OK** to confirm the deletion or **Cancel** to abort.

Note: Only the texts in the currently-selected language will be deleted. If the project 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.

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

6.4. 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 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 as the Survey XML Export supports Confirmit Authoring XML Web Services' object structure.

To export a questionnaire:

- Activate the survey (select it from the project list).
- In the Designer menu, click **Export Survey Definition**.

The Survey Definition Export overlay opens as shown below.

Figure 182 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.

6.4.1. 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>`).

6.5. Project Log

Confirmit records all actions executed on a project, and the Project Log provides you with an overview of all the changes that have been made to the project. 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 .

Date	User	Description
02/11/2009 11:50:05	Apple, Adam	Project created.
02/11/2009 11:51:24	Apple, Adam	Status: production
02/11/2009 11:57:35	Apple, Adam	ProfessionalAuthoring: Property "deleted" of node "q18" changed: ""->"true"
02/11/2009 11:58:04	Apple, Adam	Status: production
23/11/2009 09:53:21	Apple, Adam	ProfessionalAuthoring: English Text of node "q2" changed: "Please enter your name."->" Please enter your name. "
23/11/2009 17:23:46	ProS, Margarita	Status: production
23/11/2009 18:22:48	ProS, Margarita	Status: production
23/11/2009 18:29:17	ProS, Margarita	Status: production
26/11/2009 11:34:58	Apple, Adam	ProfessionalAuthoring: ID of node "" changed: ""->"q22"
26/11/2009 11:34:58	Apple, Adam	ProfessionalAuthoring: Property "cardSortIncrement" of node "q22" changed: ""->"2"
26/11/2009 11:34:58	Apple, Adam	ProfessionalAuthoring: Property "cardSortDroppedIncrement" of node "q22" changed: ""->"0"
26/11/2009 11:34:58	Apple, Adam	ProfessionalAuthoring: Property "dataWriteAccessLevel" of node "q22" changed: ""->"0"
26/11/2009 11:37:06	Apple, Adam	ProfessionalAuthoring: English Title of node "q22" changed: ""->"Satisfaction"
26/11/2009 11:37:06	Apple, Adam	ProfessionalAuthoring: English Text of node "q22" changed: ""->"On a scale from 1 to 5, how satisfied were you with the cars you have tested?"
		ProfessionalAuthoring: English Instruction of node "q22" changed: ""->"1 = very unsatisfied. 5

Figure 183 Example of a Project log

6.6. Confirmit Express

If the project you have selected is a Confirmit Express project, you will also have the **Convert to Survey Designer** button in the toolbar. If you have opened the project as an Approver, then the toolbar will also include the **Approve Survey** and **Deny Survey** buttons (see the figure below).

Figure 184 The Project Overview General tab for an Express project

For further information about Confirmit Express, refer to the Express User Guide.

6.6.1. How to Convert a Project 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 **Project 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.

6.6.2. 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, there are two types of questionnaire designer available: Standard Designer and Survey Designer. Standard Designer is designed for simple questionnaires with no advanced scripting or routing. This manual describes Survey 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 **Project** icon, or, go to the **Home > New > Project** menu command.

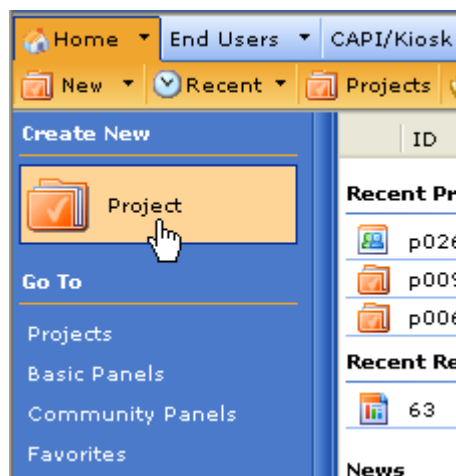


Figure 185 The Create New Project icon

The New Survey overlay opens.

The screenshot shows a 'New Survey' dialog box. It contains the following elements:

- Survey name:** A text input field.
- Options:** Two checkboxes: 'One question per page' and 'Make survey based on an existing template'.
- Survey layout:** A dropdown menu.
- Survey language:** A dropdown menu currently set to 'English', with a link 'Add more languages' below it.
- Data storage:** A section with a 'Read more' link and a dropdown menu set to 'Optimized format'.
- Buttons:** 'Create Survey' and 'Cancel' buttons at the bottom.

Figure 186 The New Survey overlay

3. Type the desired name of your survey into the Survey Name field.
4. Check the boxes as appropriate to specify one question per page (see the The General Options Tab section on page 353 for more information) and/or to base the survey on an existing template. [Professional users only] If you select to base the survey on an existing template, then a Find Template button 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, and select the Survey Layout you wish to use (see the Survey Layouts section on page 50 for more information).
6. Select the project 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.

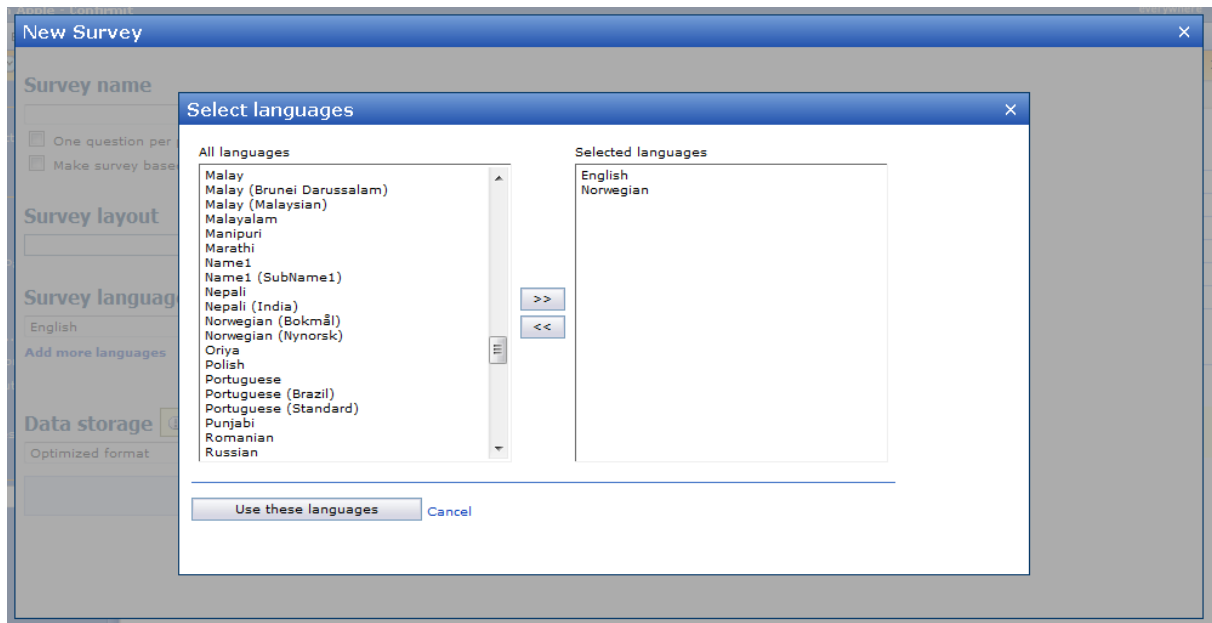


Figure 187 The Select Languages dialog

8. [Professional users only] Select the type of data storage you wish to use (see the The Optimized Database Format section on page 31 for more information). Note that you can change this until the database is generated. Standard users can only use the Optimized format.
9. 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 project, go to the **Project Management > Overview** menu item.

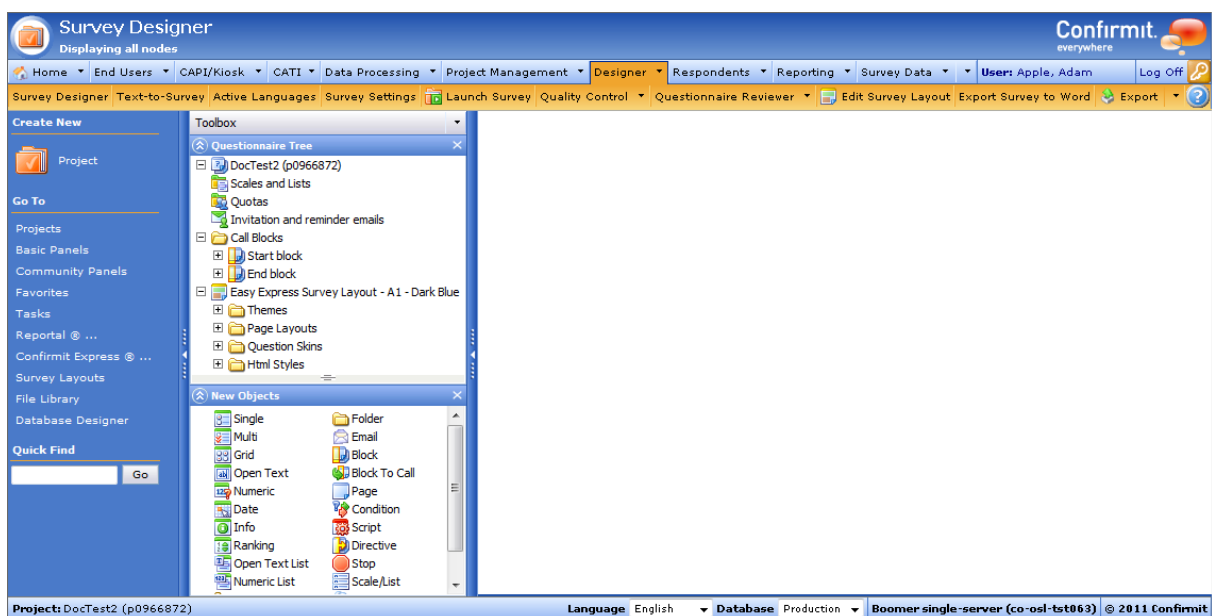


Figure 188 The Survey Designer page

The survey now exists, and you can now add the question. Note that Confirmit has given the survey a unique Project ID.

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 however it cannot be changed back to Legacy again.

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; i.e. you can 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".

Answers and scales added in Doc2Survey must be "pure text"; i.e. there can be no headings, predefined lists etc.

7.2.1. Doc2Survey Functionality

The Doc2Survey page comprises three panes.

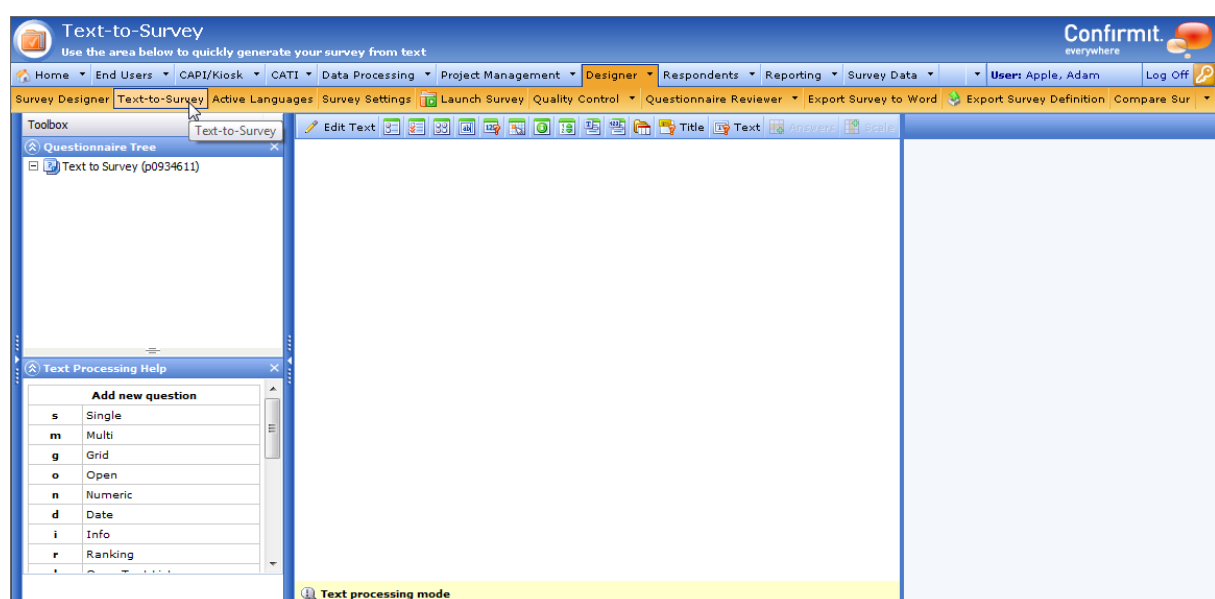


Figure 189 The Doc2Survey page

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 includes 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.

In the Toolbox pane, the Text Processing Help area shows a list of the 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
n	Numeric
d	Date
i	Info
r	Ranking
l	Open Text List
u	Numeric List
3	3D Grid
Question texts	
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 190 The Text Processing Help toolbox

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.

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 the How to Create a Grid Question section on page 157 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.

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.

Click the **Mark Text** button to automatically give processed text a gray background. Click the button again to switch off the functionality. 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**.

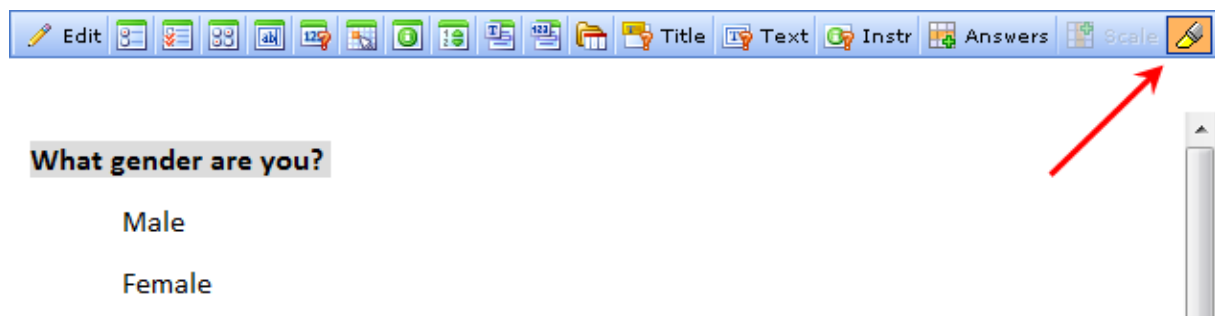


Figure 191 Marking processed text

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 the Creating a New Survey section on page 149 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.

- 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).
- Returning to the Doc2Survey window, in the central Editing area of the page click the **Edit Text** 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.

- 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.

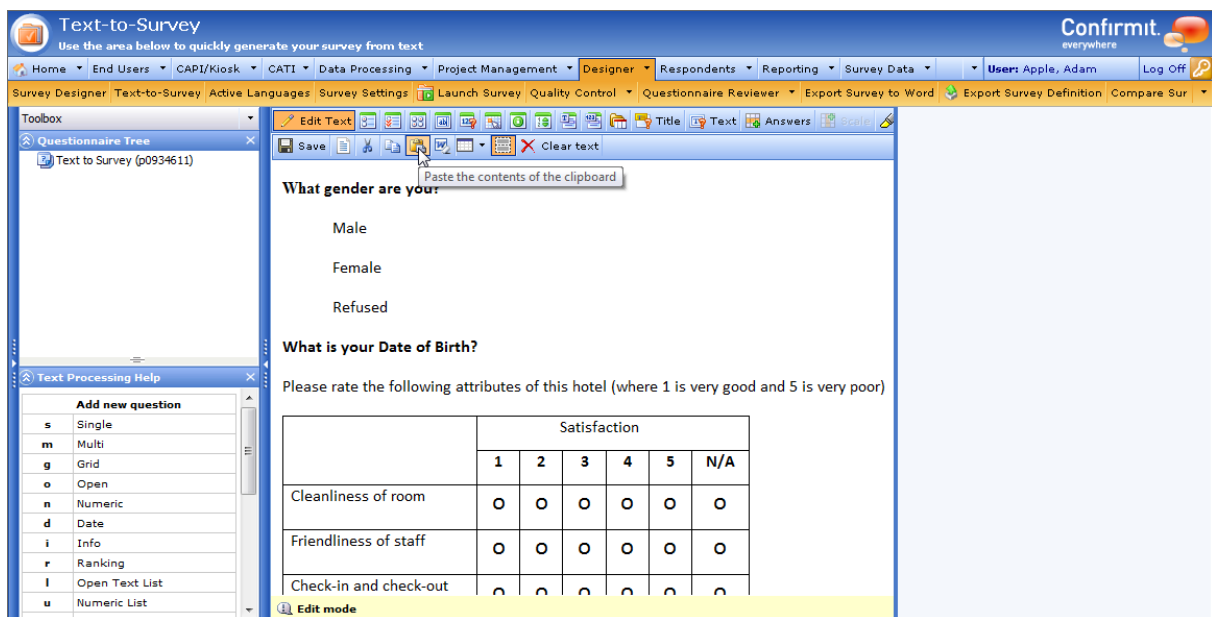


Figure 192 The text to be imported is copied into the central Editing area

- 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 the Doc2Survey Functionality section on page 152 for more information), and standard copy, cut and paste keyboard shortcuts can also be used here.

To create the Gender question:

- 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 the word(s) then the selected text will be used as the Text and the Question ID will be for example q1).
- 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.

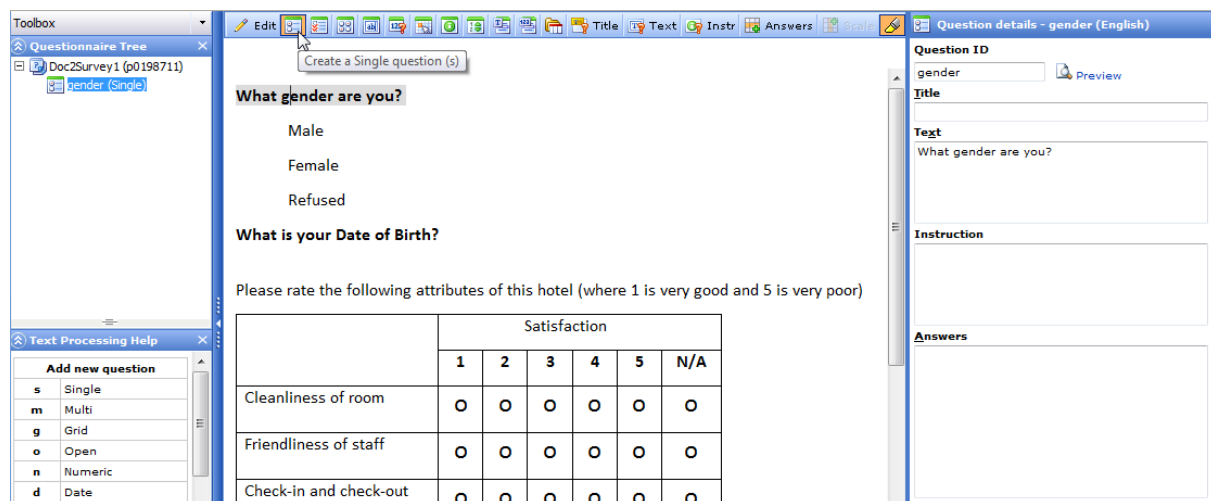


Figure 193 The gender question is created

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 **Copy current selection** button in the toolbar to copy the selected options, then click into the Answers field and click the **Paste contents of clipboard** button.

The three answer options are pasted into the Answers field. Note that Answers and Scales are given special treatment to remove any leading or trailing spaces, underscores tabs etc. In this case the extra space between the options is removed automatically, leaving the three options on consecutive rows

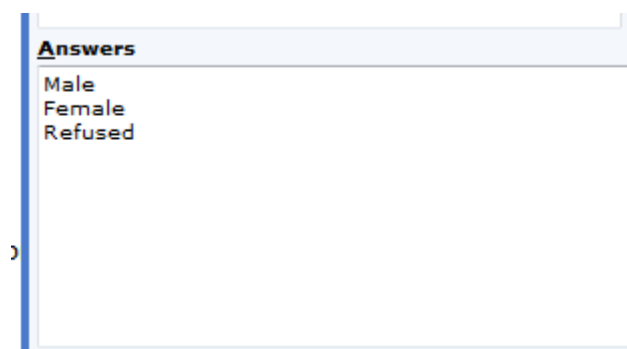


Figure 194 The answer options

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.

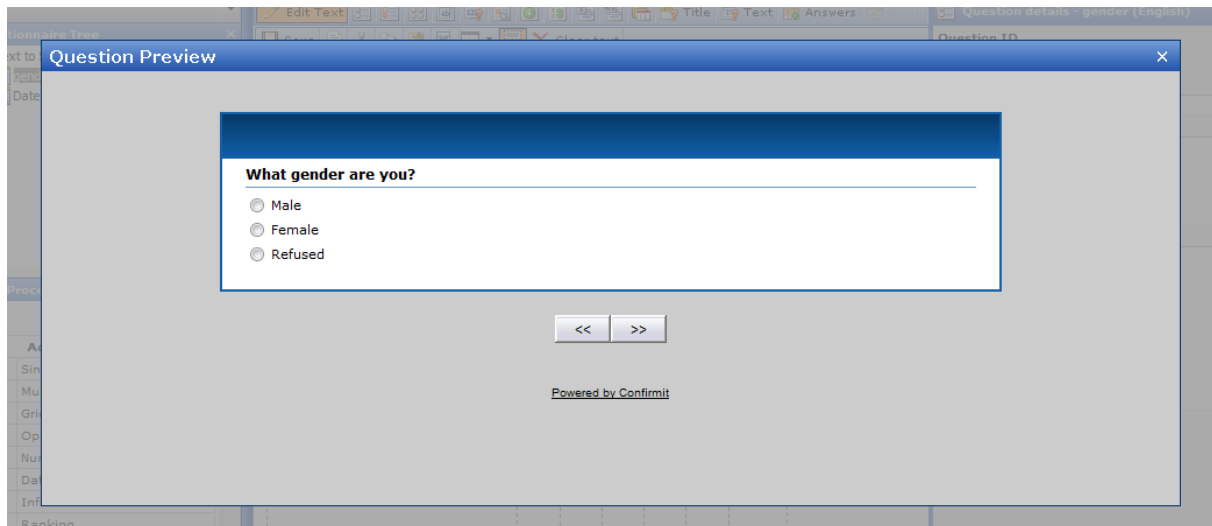


Figure 195 Previewing the question

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.

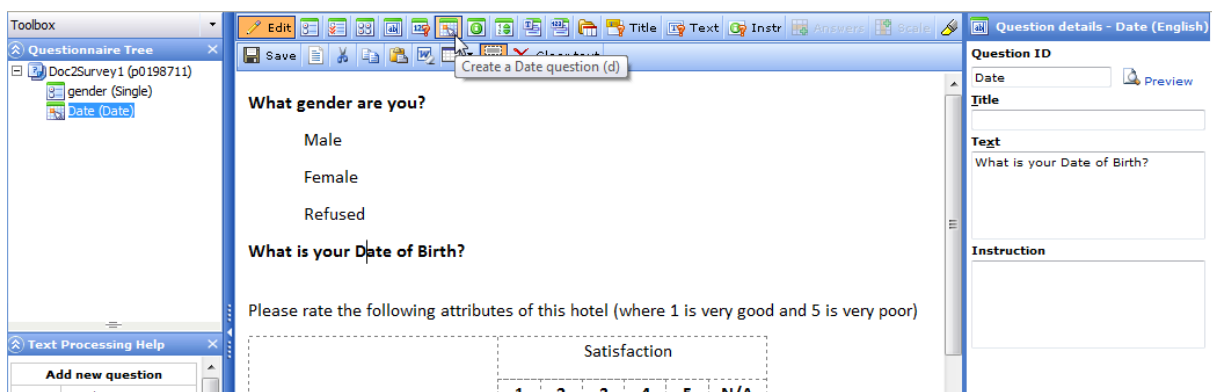


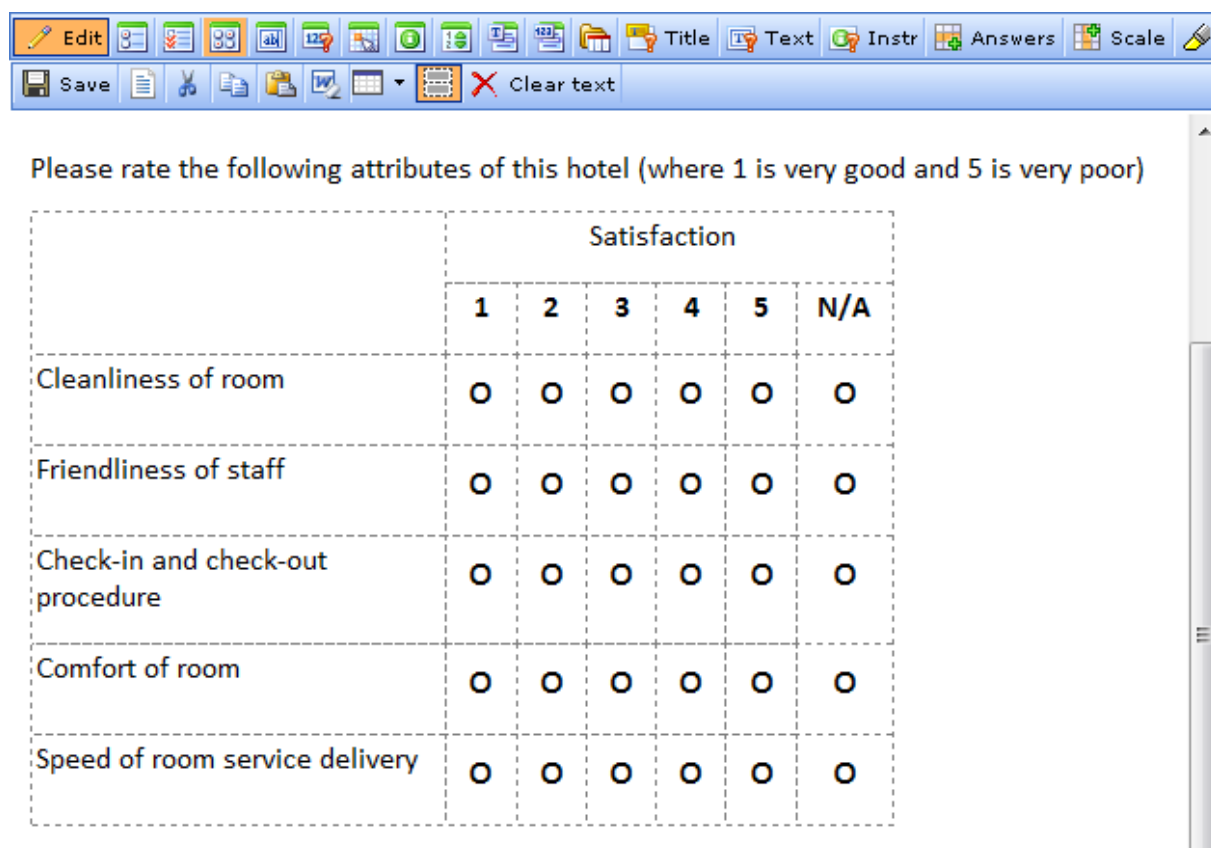
Figure 196 Creating the Date question

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.



Please rate the following attributes of this hotel (where 1 is very good and 5 is very poor)

	Satisfaction					
	1	2	3	4	5	N/A
Cleanliness of room	☐	☐	☐	☐	☐	☐
Friendliness of staff	☐	☐	☐	☐	☐	☐
Check-in and check-out procedure	☐	☐	☐	☐	☐	☐
Comfort of room	☐	☐	☐	☐	☐	☐
Speed of room service delivery	☐	☐	☐	☐	☐	☐

Figure 197 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.

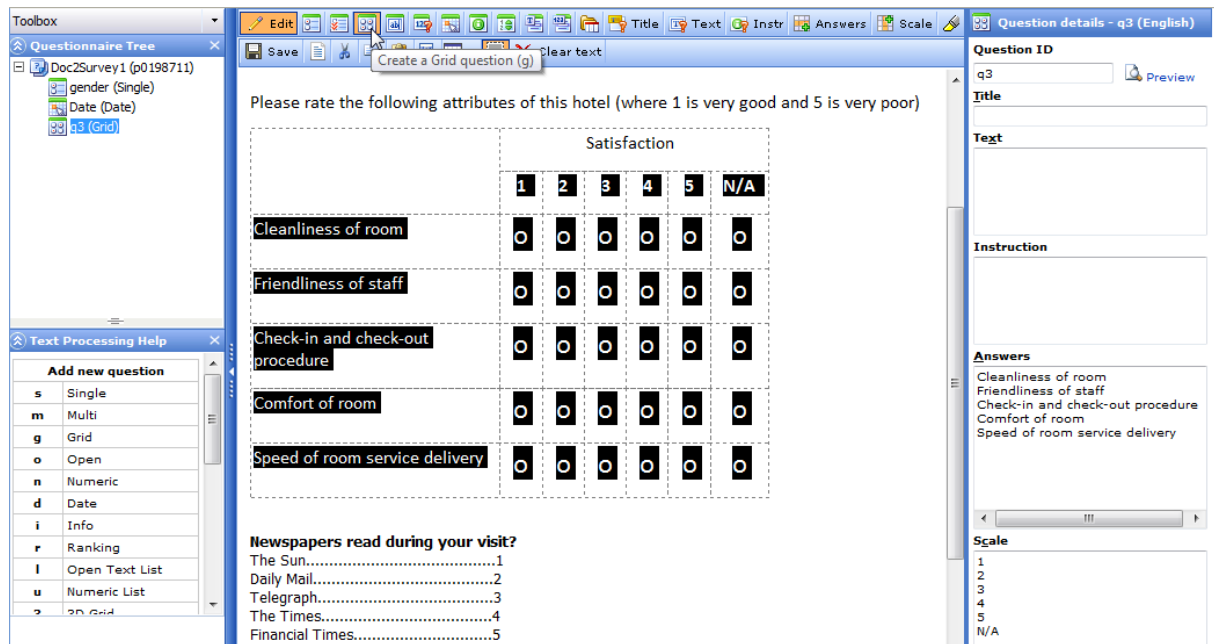


Figure 198 Creating the Grid question

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.

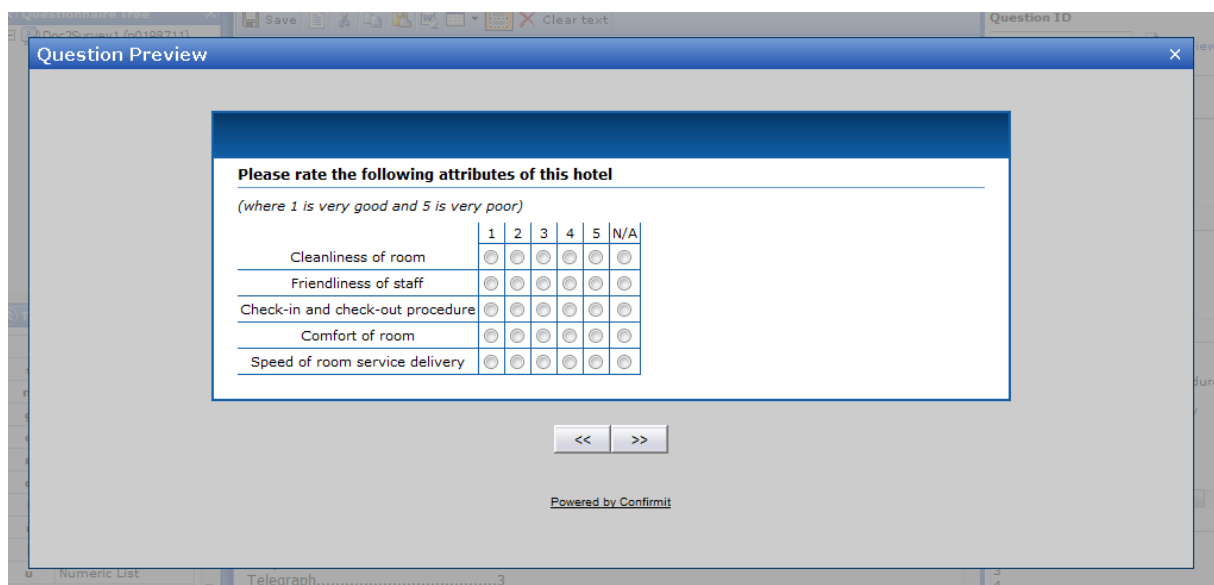


Figure 199 Previewing the Grid question

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. 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 the Creating a New Survey section on page 149 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 the How to Import a Word Document into the Doc2Survey Functionality section on page 154 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 project folder in the Questionnaire Tree toolbox (the project 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 project 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 project 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.

7.4.1. The Object Types

All the objects that you can add to a questionnaire are stored in the New Objects toolbox, as shown below.

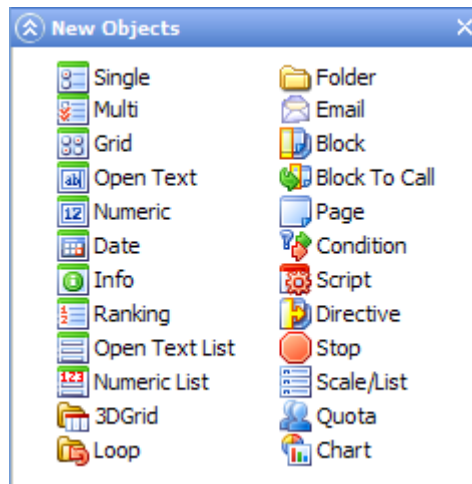


Figure 200 The objects available in the New Objects toolbox

The actual question forms that will be seen by the respondent are the first 10 objects (Single to Numeric List), 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 The Single Object section on page 162 for more information).
- **Multi** – Multi-answer question. The respondent can select several answers from a list (see the The Multi Object section on page 162 for more information).
- **Grid** – A question type that lets the respondent evaluate a list of variables along a scale (see the The Grid Object section on page 163 for more information).
- **Open Text** – A question type that allows the respondent to type in his or her response using "free text"(see the The Open Text Object section on page 165 for more information).
- **Numeric** - A question type that allows the respondent to type in numerical answers (see the The Numeric Object section on page 166 for more information).
- **Date** - A question type that allows the respondent to input a date as the answer (see the The Date Object section on page 167 for more information).
- **Info** – Used for information pages in the survey (see the The Info Object section on page 168 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 The Ranking Object section on page 169 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 The Open Text Object section on page 165 for more information).
- **Numeric List** - A question type that allows the respondent to add numerical answers to a list of options (see the The Numeric Object section on page 166 for more information).

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 the Database Designer section on page 276 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.

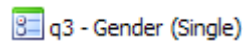


Figure 201 A Single object in the Questionnaire Tree

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.

The screenshot shows a survey interface with a green header. On the left is the Confirmit logo with the tagline 'everywhere'. On the right, the title 'Car Survey Getting Started' is displayed. Below the title, the question 'Gender' is shown with the instruction 'Please specify your gender.' Below this instruction are two radio button options: 'Male' and 'Female'. At the bottom left, it says 'Powered by Confirmit'. At the bottom right, there are two navigation buttons: '<<' and '>>'.

Figure 202 Example of an answer list in the form of radio buttons

This screenshot shows the same survey interface as Figure 202, but the answer options are presented as a drop-down list. The instruction 'Please specify your gender.' is followed by a drop-down menu with the placeholder text 'Please select your answer'. The menu is open, showing two options: 'Male' and 'Female'. A mouse cursor is pointing at the 'Female' option. The rest of the interface, including the header, title, footer, and navigation buttons, is identical to Figure 202.

Figure 203 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 The Multi Object section on page 162 for more information). The various properties and settings available for this form are listed in the Properties page (see the Question Properties section on page 183 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.

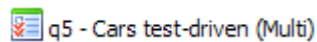


Figure 204 A Multi object in the Questionnaire tree

 A screenshot of a survey interface. At the top left is the Confirmit logo with the tagline 'everywhere'. The title 'Car Survey Getting Started' is at the top right. The main question is 'Cars test-driven' with the prompt 'Which cars have you test-driven?' and 'Please choose up to four cars.' Below this, there are three sections: 'European' with checkboxes for BMW and Volvo; 'Japanese' with checkboxes for Honda and Toyota; and 'American' with checkboxes for Chrysler and Ford. There is also an 'Other, please specify' checkbox with a text input field, and a radio button option 'Did not test any cars'. At the bottom left, it says 'Powered by Confirmit'. At the bottom right, there are navigation buttons '<<' and '>>'.

Figure 205 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 the Question Properties section on page 183 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 .

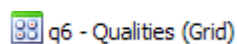


Figure 206 A Grid object as it appears in the Questionnaire Tree

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Car Survey Getting Started

Qualities

Please indicate how important the following qualities are to you when choosing a car.
 1 means "Not important"
 5 means "Very important"

	1	2	3	4	5	Don't know
Comfort	☐	☐	☐	☐	☐	☐
Price	☐	☐	☐	☐	☐	☐
Safety	☐	☐	☐	☐	☐	☐
Speed	☐	☐	☐	☐	☐	☐

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<< >>

Figure 207 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 the Question Properties section on page 183 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 allows you to change the layout of the form to Grid Bars as shown below, Card Sort or Slider (see the The Advanced WI Features Tab section on page 189 for more information).

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everywhere

Car Survey Getting Started

Qualities

Please indicate how important the following qualities are to you when choosing a car.
1 means "Not important"
5 means "Very important"

Comfort

1 2 3 4 5 Don't know

Price

1 2 3 4 5 Don't know

Safety

1 2 3 4 5 Don't know

Speed

1 2 3 4 5 Don't know

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<< >>

Figure 208 An example of a Grid question with the grid bars layout

A variation of the Grid object is the 3D-Grid (see the 3D – Grid section on page 212 for more information).

7.4.1.4. 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 in any answer. This type of question form would be used when asking the respondent for his/her 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.

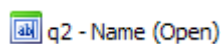


Figure 209 An Open object in the Questionnaire Tree

Figure 210 Example of an Open question

You can convert an Open Text question to a Numeric or Date 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 for 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 the Question Properties section on page 183 for more information).

7.4.1.5. The Numeric Object

A Numeric question is a "free text" question with a text field for numeric answers. 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.

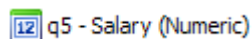


Figure 211 A Numeric object in the Questionnaire Tree

In this case the object is being used to elicit the respondent's salary.

Figure 212 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 213 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 the Question Properties section on page 183 for more information).

7.4.1.6. 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.

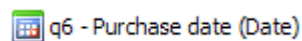


Figure 214 A Date object in the Questionnaire Tree

In this case the object is being used to discover when the respondent made a particular purchase.

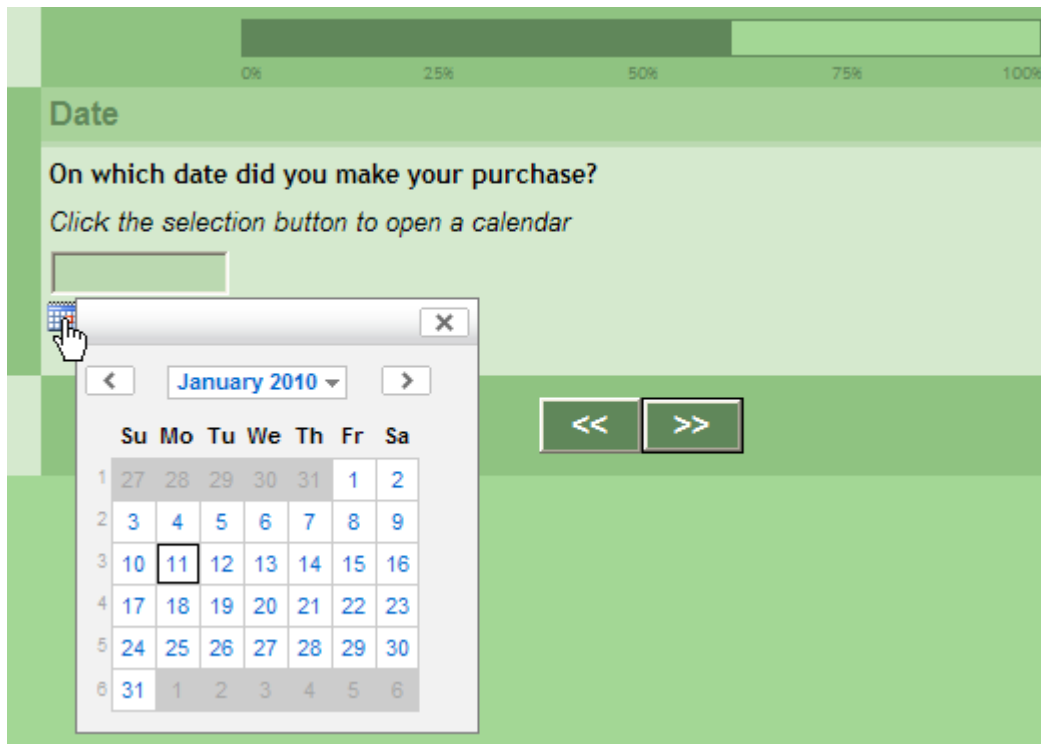


Figure 215 Example of a Date question in use

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 (see the Searching for Respondents section on page 571 for more information).

7.4.1.7. 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.

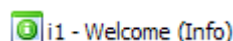


Figure 216 A Welcome Info object in the Questionnaire Tree

Figure 217 Example of an Info page as the respondent might see it

This object has Text, Masking, Preview and Languages tabs (see the Editing a Form section on page 171 for more information).

7.4.1.8. 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 218 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**.

For a Ranking question's Properties page, the Advanced WI Features tab includes the Drag-n-Drop Ranking option (see the The Advanced WI Features Tab section on page 189 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.

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Car Survey (Optimized)

Preference

Please rank the cars in your order of preference.
1 = the car you liked the most.

Rolls Royce	1	
VW	2	
Jaguar	3	
Toyota	4	
Ferrari	5	
Ford	6	
BMW	7	
Nissan	8	

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<< >>

Figure 219 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.

Please rank the cars in your order of preference.
1 = the car you liked the most.

	1	Rolls Royce
VW	2	
Jaguar	3	
	4	BMW
Ferrari	5	
Ford	6	Toyota
BMW	7	
Nissan	8	

The image shows a ranking interface with two columns. The left column contains car names: VW, Jaguar, Ferrari, Ford, BMW, and Nissan. The right column contains a ranked list: 1 Rolls Royce, 2, 3, 4 BMW, 5, 6 Toyota, 7, 8. A red arrow points from the BMW in the left column to the BMW in the right column at rank 4. A hand cursor is over the BMW in the right column. Navigation arrows are present between the columns.

Figure 220 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.

7.4.2. Read-Only Access to a Form

If a user has Read-only access to a questionnaire, the **Save** and **Delete** buttons will be inactive on the **Project Management > Overview** page and only the General and Active languages tabs will be displayed.

The screenshot shows the 'Project Overview (Read-Only)' interface. At the top, it says 'Set the details for the current project'. The navigation menu has 'Home', 'Project Management' (active), 'Designer', and 'Translation'. Under 'Project Management', there are sub-tabs: 'Overview' (active), 'Interview progress', 'Survey Log', and 'Project Log'. Below these are buttons for 'Save' (disabled), 'Duplicate', and 'Delete' (disabled). Further down are tabs for 'General' (active) and 'Active Languages'. The 'Project ID' is shown as 'p0005050'.

Figure 221 Example of the Overview page for a user with Read Only access

7.4.3. Editing a Form

To edit a form, either double-click on the icon in the Questionnaire Tree, or right-click on the icon and choose **Properties** from the menu that appears. This opens a details view of the form on the right side of the window. This view consists of several separate pages, described below. Click the buttons/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).

Note: If you have made modifications in one of the details view pages and the next action will take place outside the details view frame, you must click **Save** to save the changes. Not all pages are available for all form types.

7.4.3.1. Question ID

The Question ID is the project-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.

Do not use reserved keywords as question IDs (see the APPENDIX C: RESERVED KEYWORDS section on page 615 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.

Note: 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! As an 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.

Note: If the project uses the Optimized Database format (see the The Optimized Database Format section on page 31 for more information), then the use of the underscore character (_) in question IDs and codes is restricted (see the Underscore Character Limitations in Question ID section on page 172 for more information).

If you change a question ID when the survey is live, a new column is created. The old column will remain in the database with its original name and any data that was gathered up to the point of the ID change.

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.

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.

7.4.3.1.1. Underscore Character Limitations in Question ID

When using the **Optimized Database format**(see the The Optimized Database Format section on page 31 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 the Linking a Question to a Loop section on page 178 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

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 the Languages section on page 183 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 Online Reporting. 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 the Scratchpad section on page 232 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, Confirmit Express 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 the How to Include an Image in a Text Field in HTML Source Mode section on page 121 for more information). For the Answer tab text fields, you can drag-and-drop images directly from the File Library (see the How to Include an Image in WYSIWYG Mode section on page 121 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:

```
.
```

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

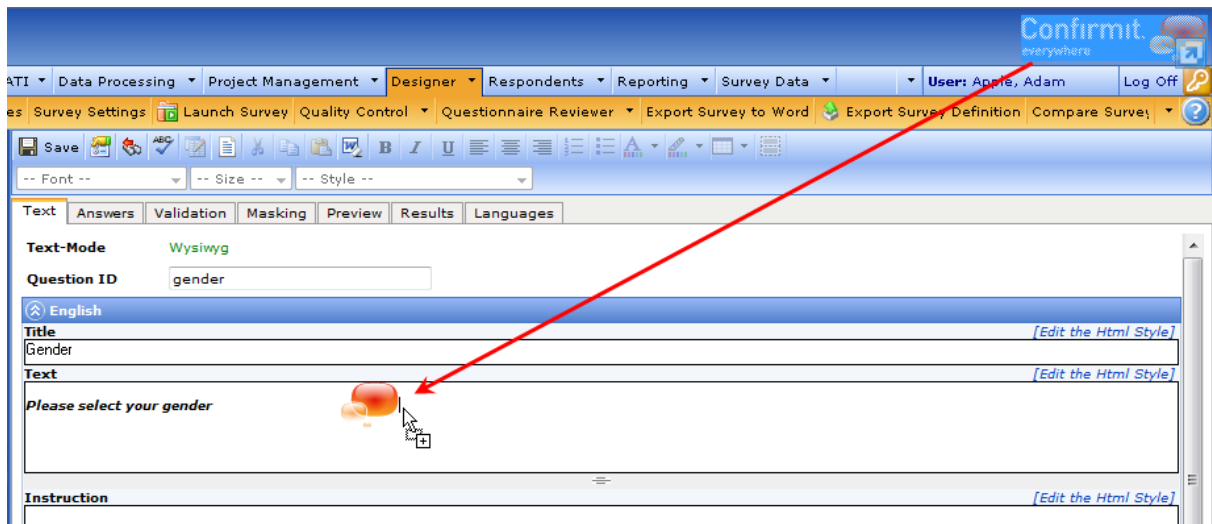


Figure 222 Dragging a logo into the text field

Note: When you run a survey from a secure site using SSL, 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 The Optimized Database Format section on page 31 for more information), then you can link an answer list from a loop into the question (see the Linking a Question to a Loop section on page 178 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 the Codes section on page 177 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 the Database Designer section on page 276 for more information).

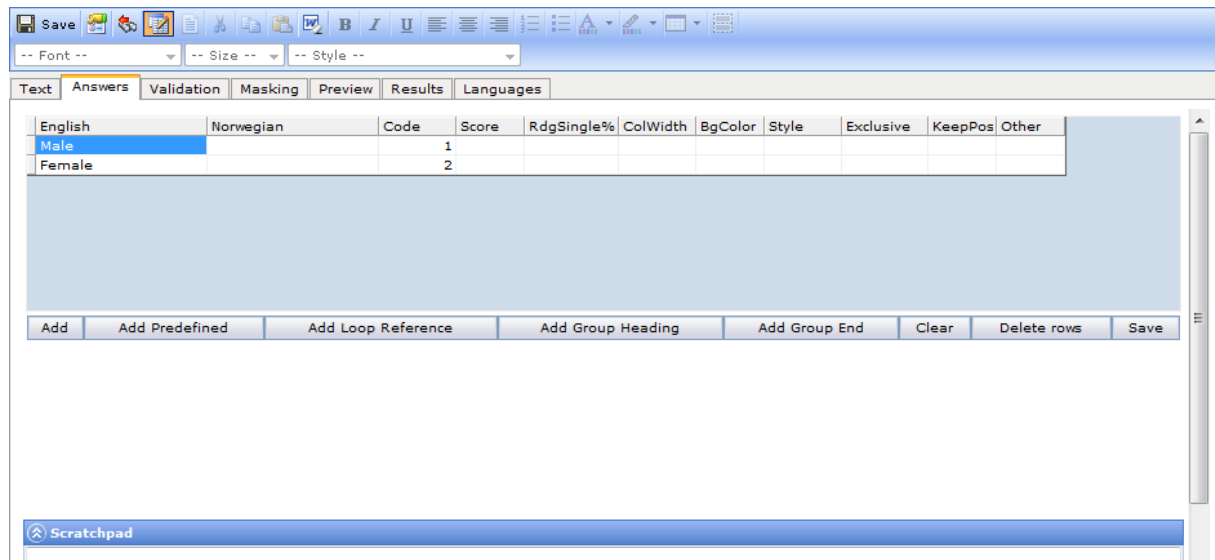


Figure 223 Example of an Answers page in FlexiGrid Component

In DHTML mode, one can also switch between the HTML and the WYSIWYG editors.

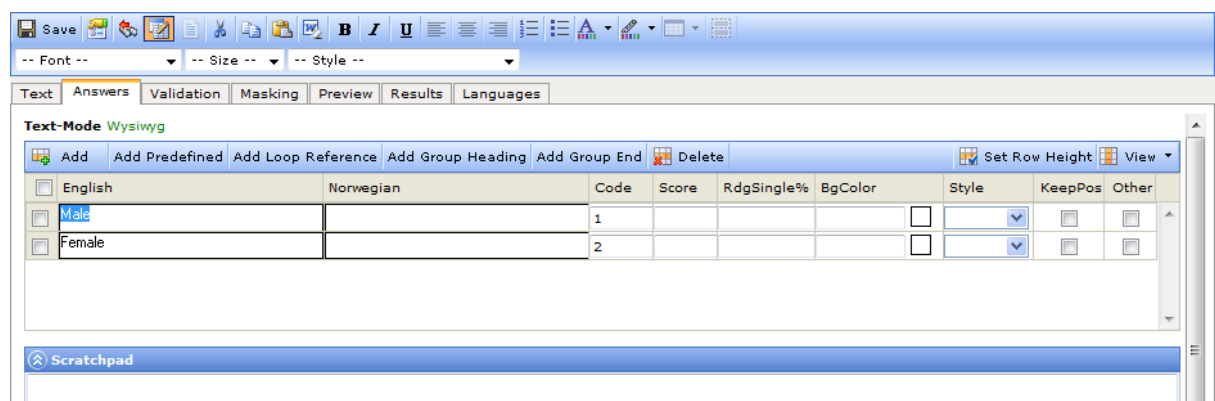


Figure 224 Example of the Answers page in DHTML input mode

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 the [How to Use Images as the Answer Options](#) section on page 180 for more information).

If you are using the Optimized Database format (see the [The Optimized Database Format](#) section on page 31 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 the [Searchable Answer Lists \(Searchable Multis\)](#) section on page 193 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 [The Advanced WI Features Tab](#) section on page 189 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.
2. Click inside the first column in the list.

This will activate the first column.

3. 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.

4. Create a new row (see below) and continue with the list until it is complete.
5. 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 the Scratchpad section on page 232 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 the Predefined Lists section on page 192 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.

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:

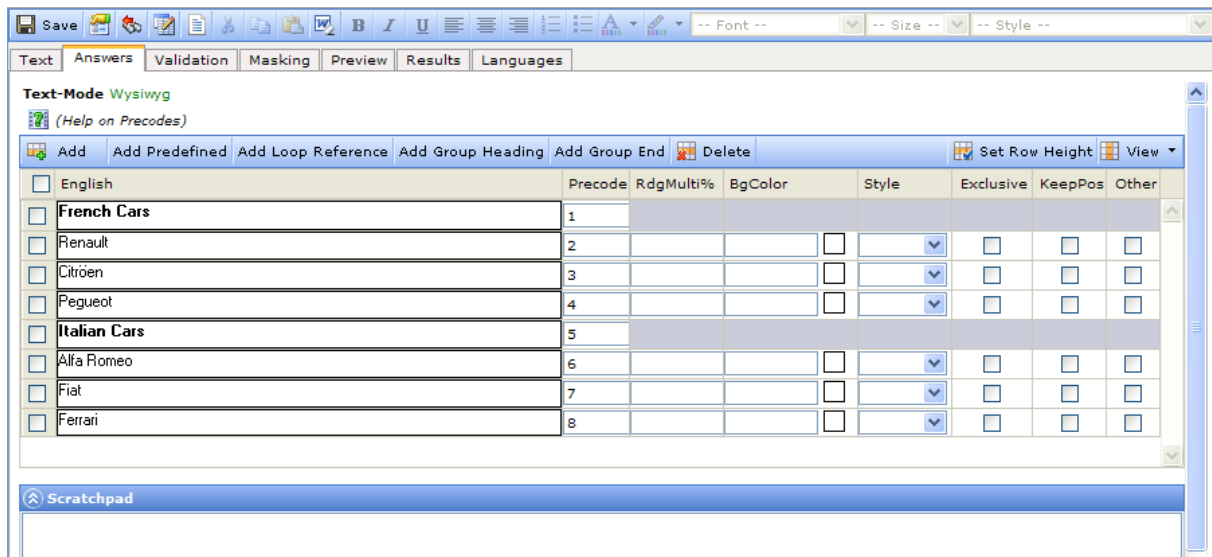


Figure 225 Adding Group Headings

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 the Question Properties section on page 183 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 the Question ID section on page 172 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.

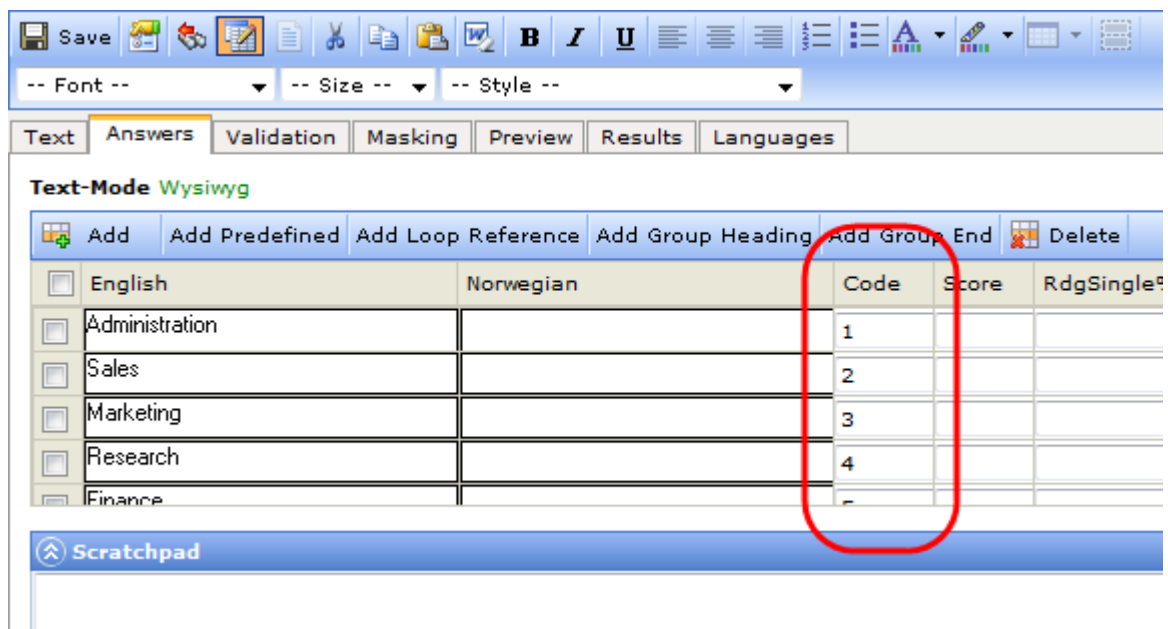


Figure 226 Examples of codes for the answers for a Single question

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 the Generating the Response Databases - Launching section on page 371 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.

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 The Optimized Database Format section on page 31 for more information), the underscore (_) character can be used, though this is not recommended.

Important
For a question that includes a loop reference (see the Linking a Question to a Loop section on page 178 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. 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 The Optimized Database Format section on page 31 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 addition to the loop, in the normal manner. Any settings applied to the answers, for example Randomization, will be applied to all the answers equally, irrespective of where they come from.

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 the Loops section on page 208 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**.

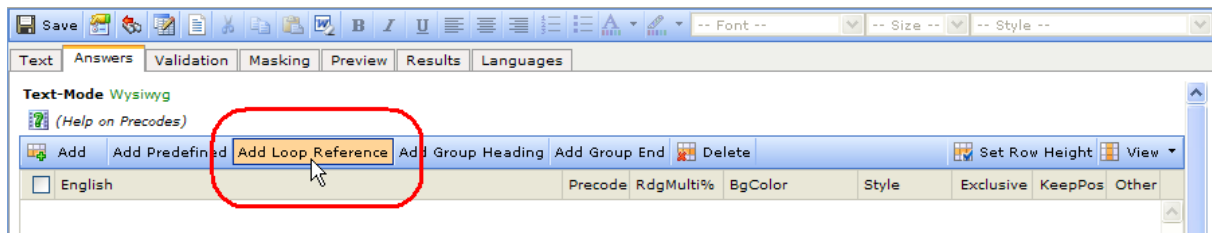


Figure 227 Adding a loop reference to a question's answer list

A row is added to the answer list, including a drop-down list of the available loops.

- 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.

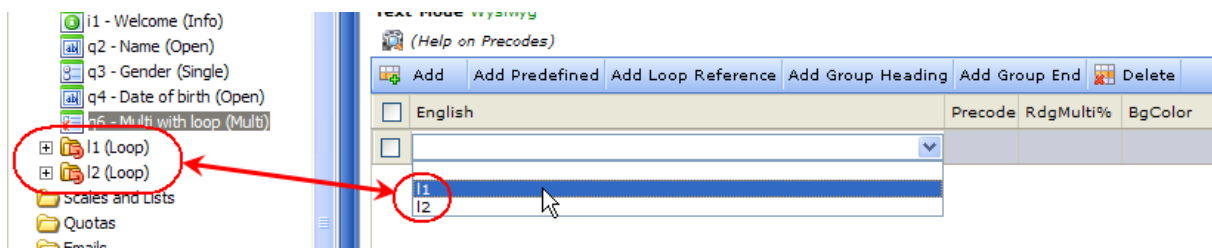


Figure 228 Selecting the desired loop from the list of those available

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.

- 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 the Codes section on page 177 for more information). These answers cannot be allocated codes automatically as the loop reference will very likely cause duplicate codes to be generated.

- Save the changes.

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 the Languages section on page 183 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 project 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 the Codes section on page 177 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 **The Optimized Database Format** section on page 31 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 Online Reporting. 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 The Random Data Generator section on page 343 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.
- **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 the HTML Styles section on page 83 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 the How to Use Images as the Answer Options section on page 180 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 the Question Properties section on page 183 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 the Question Properties section on page 183 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. 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.

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 Text Mode to **WYSIWYG**.
2. Open the Properties page for the question and go to the **Advanced WI Features** tab (see the The Advanced WI Features Tab section on page 189 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, as shown below.

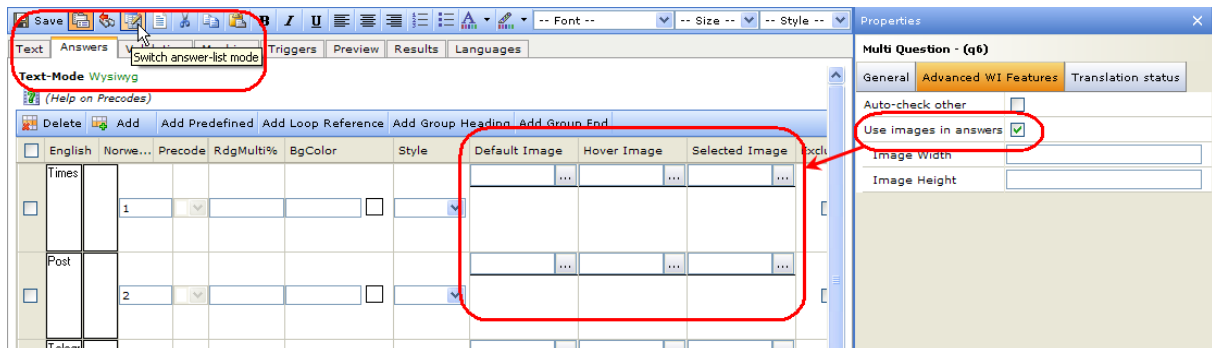


Figure 229 Using images in answers

The three additional columns allow you to add separate images for each answer option; for when the option is not selected (Default Image), for when the mouse cursor is over the image area (Hover Image), and for when the option is selected (Selected Image).

4. To add an image to an answer, click the ... button beside the appropriate link field.

The File Library screen opens in the lower part of the window (see the File Library section on page 115 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 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 The General Tab section on page 184 for more information). You can set the color of the border and fill for the bars in the Question Form Input Properties form refer to the Scale Bar Label Style section under Visual Components For Question Skins for further details.

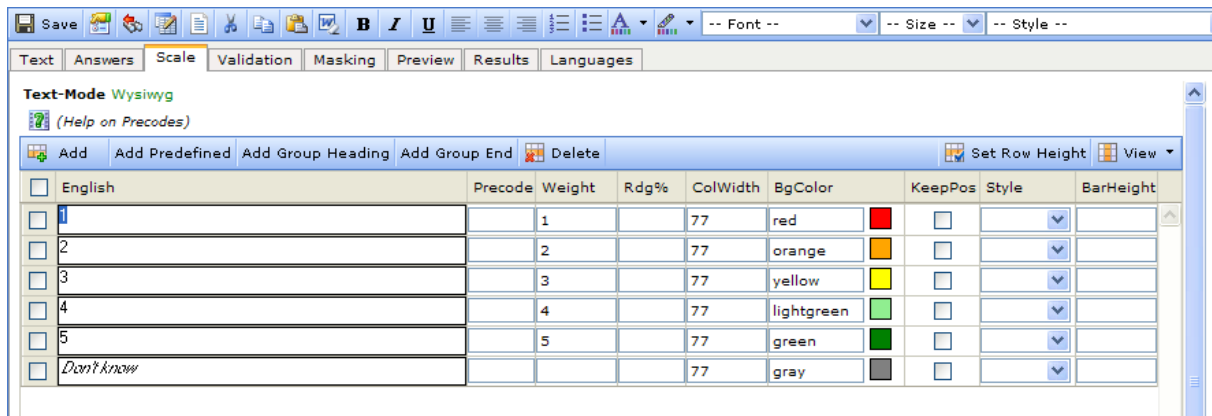


Figure 230 Example of a Scale page for a grid question

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.

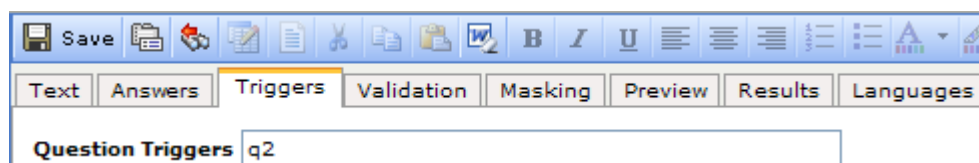


Figure 231 Example of the Triggers tab

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 the Confirmit Scripts section on page 316 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 the Confirmit Scripts section on page 316 for more information).

7.4.3.8. 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 The General Tab section on page 184 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.

7.4.3.9. Results

This page displays the Rapid Results report page for the current question (see the Rapid Results section on page 501 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.

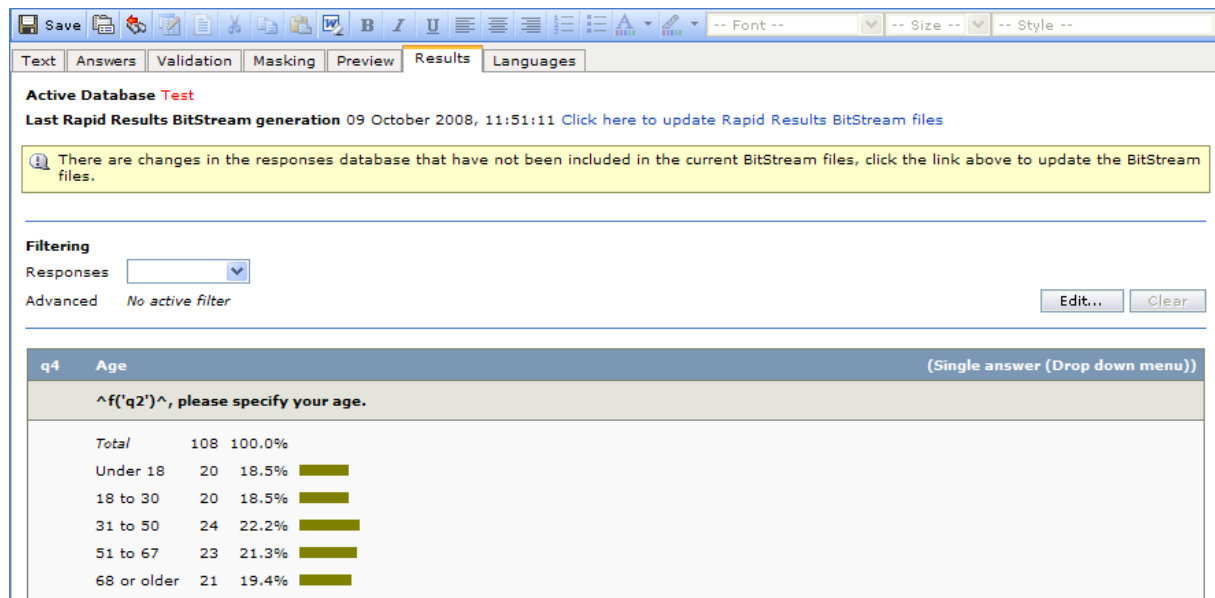


Figure 232 Example of the Results tab for a question

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.

7.4.3.10. Languages

In a multilingual project you may not want to work with all project-languages at the same time. This page allows you to select a subset of languages to work with. 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.

The languages selected here will be remembered by Confirmit such that when you move out of the project, 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 project.

Note: Survey languages are selected on the Overview page (see the Overview section on page 128 for more information)

7.4.3.11. Question Properties

To display a question's property sheet, click the **Show/Hide Properties** button on the toolbar.

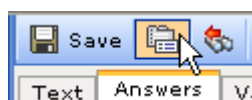


Figure 233 The Show/Hide Properties button

The properties pane opens in a new frame (see the Frames and Panes section on page 18 for more information).

The property sheet opens with a few of the most-used properties; click **Show more** towards the top of the sheet to view the full list of properties. The properties available for a question depend on the question type. All the possible properties are listed in the following sections.

7.4.3.11.1. The General Tab

- **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.

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, 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, Numeric, Lists] You can control the size of Open Text question boxes. The default size 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.

[Open, Multi] 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.

- **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, 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, 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 if you wish Confirmit to register the order in which answers are selected in a multi question. To the respondent, the question will appear as a normal multi/list. This feature is primarily for use in the CATI environment.

Note: 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.

- **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 The Online Coding Tool section on page 487 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 The Online Coding Tool section on page 487 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 survey while respondents are answering the survey.

Note also however that some functionality in Reportal, for example Hitlists, 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 the Answers section on page 174 for more information), or getting the answer from table(s) set up in “Database Designer” either as “Table lookup” or “Hierarchy lookup” (see the Database Designer section on page 276 for more information). This functionality is an add-on to Confirmit, so it may not be enabled for your company.
 - o If Hierarchy Lookup is selected (see the Using Table or Hierarchy Lookups in the Questionnaire section on page 298 for more information), then the property Force lowest level selection appears. 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.
- **Answer list/Scale display order** – [Single, 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:
 - o **In order** – in the order that they appear in the list.
 - o **Randomized** – in pseudo-random order (see the Randomization section on page 196 for more information).
 - o **Rotated** – the list is shifted and rotated by one position for each new response.
 - o **Flipped** - will alternate between displaying the list top-bottom or bottom-top for different respondents.
 - o **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.
- **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:
 - o **In order** – in the order that they appear in the list.
 - o **Randomized** – in pseudo-random order (see the Randomization section on page 196 for more information).
 - o **Rotated** – the list is shifted and rotated by one position for each new response.

- o **Flipped** - will alternate between displaying the list top-bottom or bottom-top for different respondents.
 - o **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:
 - o **In order** – in the order that they appear in the grid.
 - o **Randomized** – in pseudo-random order (see the Randomization section on page 196 for more information).
 - o **Rotated** – the order is shifted and rotated by one position for each new response.
 - o **Flipped** - the order will alternate between displaying the columns left-to-right and right-to-left for different respondents.
 - o **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 $0 < p \leq 28$.
 - **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 $0 < s \leq p$.
 - **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. E.g. .35.

- **Variable type** [not Info]
 - o **Normal** – An ordinary question object.
 - o **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 the Preview section on page 182 for more information) and Quick Test (see the Quick Test section on page 339 for more information), with the text "HIDDEN DATA" alongside to identify them, so you as the author can ensure they function correctly.

- o **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 the Handling Respondents in Limited Surveys section on page 384 for more information).
- o **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 the Recoding Data section on page 537 for more information)
- o **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 the Basic Panels section on page 421 for more information). Note that this setting cannot be applied to Grid and 3D-Grid questions.

- o **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 Community 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 the Basic Panels section on page 421 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 project will be used (see the Question Skins section on page 67 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:
 - o **Blank** – Replicates previous “Not required” behavior.
 - o **Required** – Forces the question to be mandatory.
 - o **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] 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 The Ranking Object section on page 169 for more information).
 - o **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 the Preparing for Data Collection section on page 353 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.
- **Default Answer Code** - [if CATI, Single, Multi] if a survey is CATI enabled (see the CATI section on page 482 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 the CATI section on page 482 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.
- **Repeat Headers** – [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.
 - o **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] 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 the Scale section on page 181 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.
 - o **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.
 - o **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.
 - o **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.
 - o **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.
 - o **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.
 - o **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.
- **Question Category** - [Not Info] define a category for the question. A Reportal user can then filter on the question categories when using hitlists in single view in Reportal. Refer to the Reportal User Guide for further details. Multiple categories can be entered in the field; separate using the semi-colon character, for example Food;Drink.

- **Exclude Translation** – [All] Allows you to exclude certain questions from the translator interface (see the Translator section on page 302 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.
- **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 the Editing the Routing section on page 231 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.

7.4.3.11.2. The Advanced WI Features Tab

The properties available on this tab depend on the type of question selected.

- **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 the Searchable Answer Lists (Searchable Multis) section on page 193 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 check boxes. 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:
 - o **Global Images** – a default value. The image URLs that are specified on the **Survey Settings > Layout** page will be used (see above).
 - o **No Images** – this setting overrides the setting from the **Survey Settings > Layout** page. Regular radio buttons and check boxes will now be used for this question irrespective of the settings in Global button images (see above).
 - o **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 .
 - o **Default** – this image will be displayed when the mouse pointer is not over the image area and an answer alternative is not selected.
 - o **MouseOver** – this image will be displayed when the respondent points the mouse at the button image.
 - o **Selected** – this image will be displayed once the respondent has selected an answer alternative.
 - o **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 the File Library section on page 115 for more information).

- **Autocheck Other** – [Single, Multi] The Other-Specify answer alternative will be selected automatically when the respondent starts entering text in the textbox. The feature:
 - o Automatically switches on the radio button/checkbox when the respondent types text in the other-specify field
 - o Automatically switches off the radio button/checkbox when the respondent clears the text from the other-specify field
 - o 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 losing sight of the column headers.

- o **Off** – Default. The feature is turned off.
- o **Automatic** – Confirmit will automatically assign an appropriate height to the grid and the scrollbar is active if necessary.
- o **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.
 - o **Off** – Default. The feature is turned off.
 - o **Automatic** – Confirmit will automatically assign an appropriate width to the grid and the scrollbar is active if necessary.
 - o **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 - not supported on mobiles/tablets] 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. When you select this option, you can then customize the look of the slider in the Question Inputs control in the Question Skin (see the Question Skins section on page 67 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 The General Tab section on page 184 for more information). Selecting this option prevents the other options in Advanced WI Features being used. Additional slider-related selections become available:
 - o **Slider Color** - [Single, Grid] appears when Slider above is selected. Allows you to select a color for the slider. Type a color code into the field or double-click on the color marker and select a color from the dialog box.
 - o **Size** - [Numeric, Numeric List] sets the size (width or height as appropriate) of the slider bar.
 - o **Vertical** - [Numeric, Numeric List] check to display the slider bar vertically.
- **Card Sort** - [Grid - not supported on mobiles/tablets] 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. The various styles for the cards and drop areas are set up in the **Question Skins > Grid Question > Question Form Input** properties pane (see the Question Skins section on page 67 for more information). Selecting this option prevents the other options in Advanced WI Features being used. Additional card-sort-related selections then become available:
 - o **Card Offset** - the offset for the stack of "unused" cards.
 - o **Card Dropped Offset** - the offset for the cards once they have been dropped onto the "answer" areas.
 - o **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 the How to Use Images as the Answer Options section on page 180 for more information). Checking this box opens two further options:
 - o **Image Width** - Specify the width of the image used.
 - o **Image Height** - Specify the height of the image used.
- **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.
- **Grid Bars** - [Grid] check this box to change the answer layout from a tabular format to grid bars (see the The Grid Object section on page 163 for more information).
 - o **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 is not weighted (see the Weighting section on page 517 for more information), then when the respondent hovers over or selects that unweighted 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 unweighted element. This enables you to for example highlight a "Don't know" element in the scale.

- **Resizable mode** - [Open, Date, Open Text List] you can allow the text fields to automatically resize while the respondent is typing text if the amount of text typed is greater than the current area will allow. The options are:
 - o **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.
 - o **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.
 - o **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.
 - o **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 summarize the answers in a numeric 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.
- **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).
- **Drag-n-Drop ranking** – [Ranked - not supported on mobiles/tablets] enables drag-and-drop functionality for Ranked questions (see the The Ranking Object section on page 169 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.

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 IE6 and IE7 (Windows), Firefox 1.5+, Opera 9+, and Safari 3.1 on Windows and 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.

7.4.3.11.3. The Translation Status Tab

For multi-lingual projects, 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 project. 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.

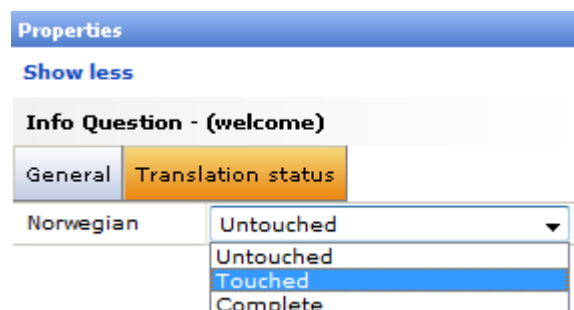


Figure 234 Example of the translation Status properties tab for a question

7.4.3.12. 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 the Answers section on page 174 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 **Scales and Lists** folder, or right-click on the **Scales and Lists** folder and select **Insert Scale/List** from the drop-down menu.

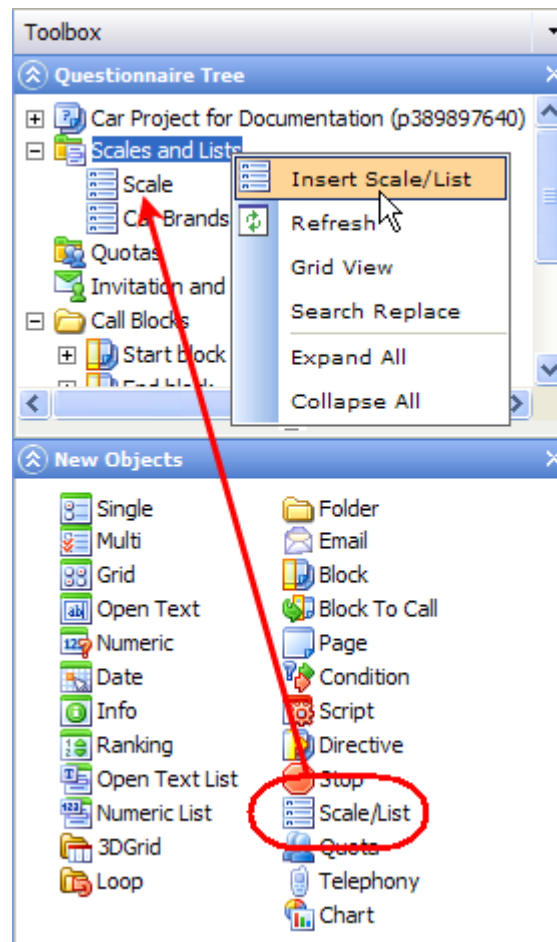


Figure 235 Inserting a Scale/List object into the Scales and Lists folder

A new list is created in the **Scales and Lists** 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 (go to [Translator](#) 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).
 - **Answers** - The answer-list behaves like the list in forms and loops (see the Answers section on page 174 for more information).

- **Scratchpad** - The scratchpad is a text editor available in several screens (see the Scratchpad section on page 232 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: 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.

7.4.3.13. Searchable Answer Lists (Searchable Multis)

Note: This functionality is only available when the Optimized Database format is selected (see the The Optimized Database Format section on page 31 for more information).

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 The Advanced WI Features Tab section on page 189 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, then although the search field is displayed, the search functionality will not work. The respondent must then scroll through the answer list and make his/her selections as for any other question.

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.

Please indicate which of the following newspapers you read regularly (at least once a month).

search

- ☐ Times
- ☐ Post
- ☐ Telegraph
- ☐ Sun
- ☐ Express
- ☐ Standard
- ☐ Evening News

☐ Not applicable

[Clear]

<< >>

Figure 236 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 .

Please indicate which of the following newspapers you read regularly (at least once a month).

t|

☐ Times

☐ Telegraph

☐ Not applicable

[Clear]

Figure 237 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.

Please indicate which of the following newspapers you read regularly (at least once a month).

t

☒ Times

☐ Telegraph

☐ Not applicable

Times x

[Clear]

Figure 238 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.

Please indicate which of the following newspapers you read regularly (at least once a month).

s

☐ Sun

☒ Standard

☐ Not applicable

Times x

Standard x

[Clear]

Figure 239 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.

7.4.3.14. 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.

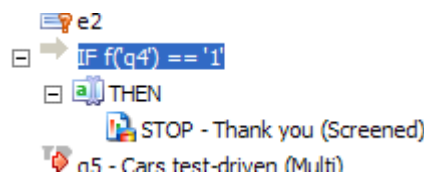


Figure 240 A Conditional node

The expressions in the IF condition are written using JScript (see the Confirmit Scripts section on page 316 for more information). To help to build expressions Confirmit has included a Expression Builder tool (see the How to Use the Expression Builder section on page 197 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 the Confirmit Scripts section on page 316 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 the Editing the Routing section on page 231 for more information), you can undelete the object by unchecking this flag, or delete the object permanently.
- **Do not perform data cleaning** – 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. Check this 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.

Note: From Confirmit v15, Hidden questions in Conditions are also "data cleaned".

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 241 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 242 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:

- o **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.
- o **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.
- o **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.
- o **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 the Confirmit Scripts section on page 316 for more information).

Always test your project to see whether the condition works as intended.

7.4.5. Directives

Directives contain instructions to the WI generator. Four different directives exist, which are used to control page break insertion 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".

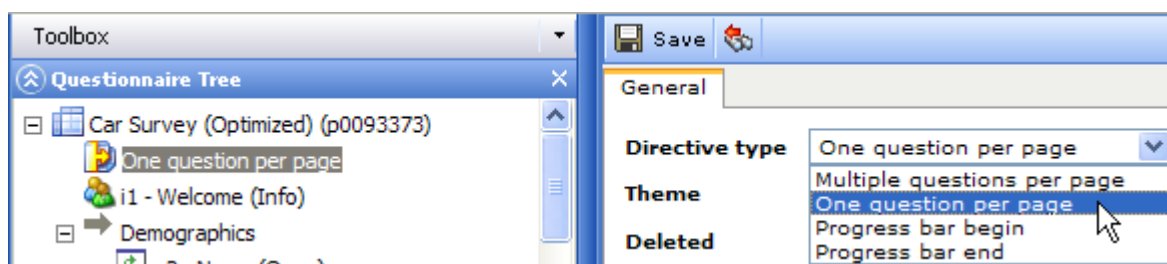


Figure 243 Selecting a Directive type

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.

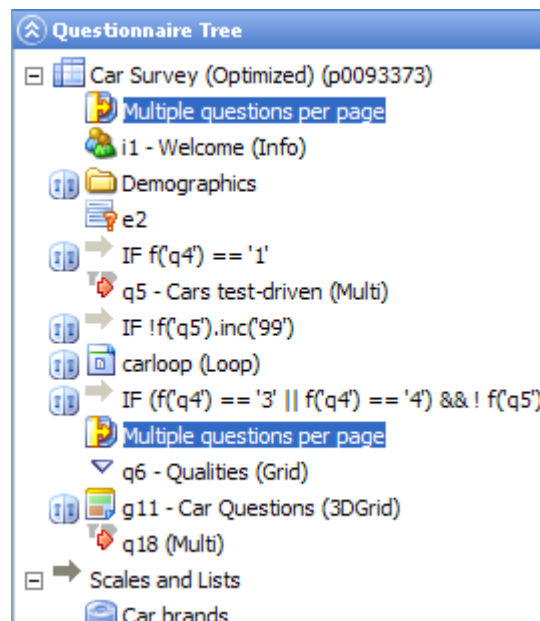


Figure 244 Example of a multiple questions directive

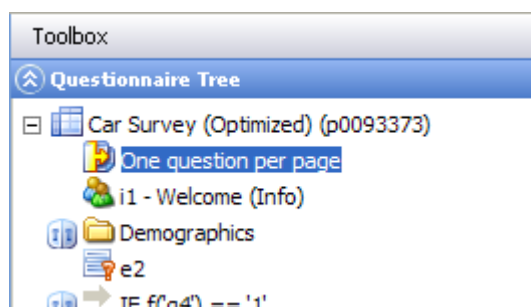


Figure 245 Example of a single question directive

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:
 - o **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.
 - o **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.
 - o **Quota full** - the interview is stopped for a certain group of respondents as the quota for that group is full (see the Quotas section on page for more information).

Note: If the CATI channel is selected for the project (see the The Survey Channels Tab section on page 355 for more information), an additional option becomes available.

- o **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 User Guide 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 (go to [Translator](#) 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 the Preparing for Data Collection section on page 353 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.

General

Interview status after stop node: Screened

Deleted: ☐

Exclude Translation: ☐

Theme:

English

Title: Thank you

Text: Thank you but you do not meet the criteria set up for this survey.

Norwegian

Title: Takk

Text: Takk, men du er ikke i målgruppen til denne undersøkelsen.

Figure 246 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 the Confirmit Scripts section on page 316 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 projects, 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.

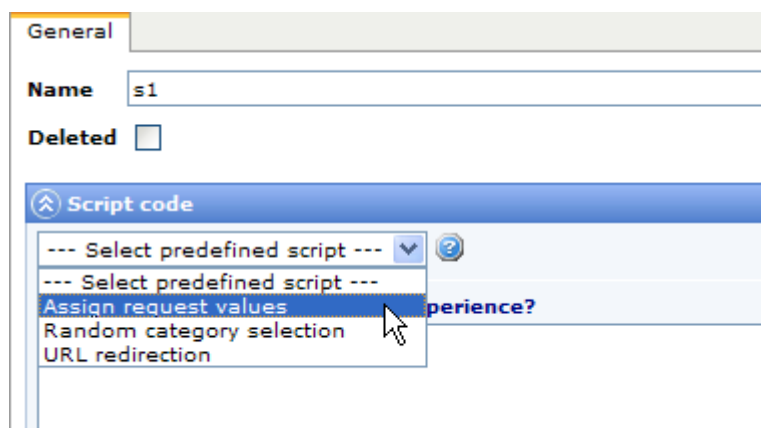


Figure 247 Selecting a predefined script for a Script object

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.

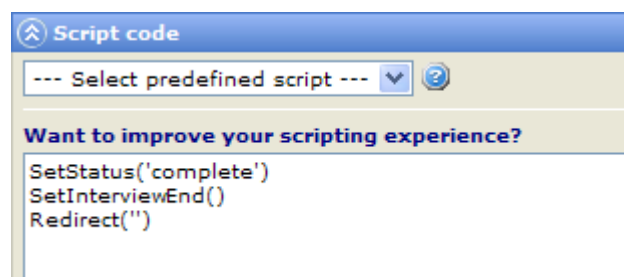


Figure 248 Appending the script ready for further editing

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.

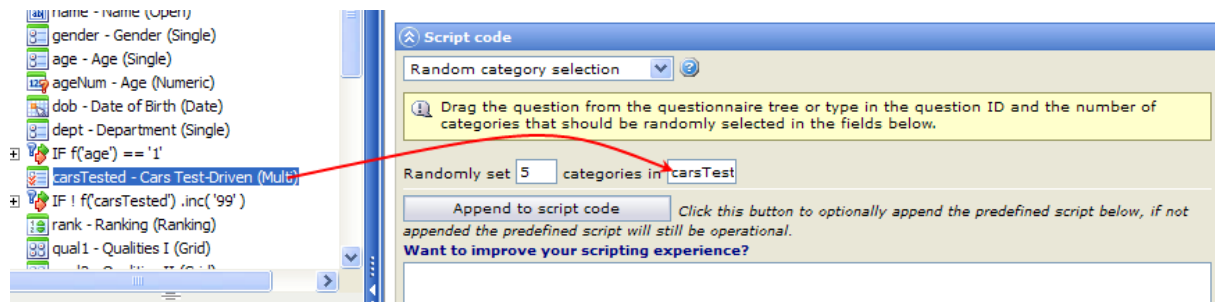


Figure 249 Using the Random Category Selection predefined script

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. Use it to redirect the respondents to a different URL. This is similar to the End Link property (see the The URL Setup Tab section on page 137 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.

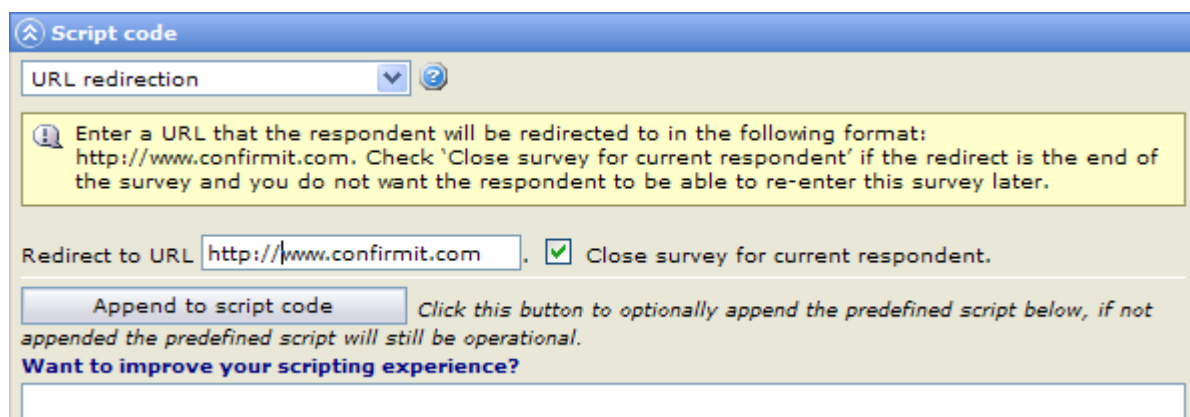


Figure 250 Using the URL Redirection predefined script

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.

7.4.7.1.3. 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 251 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 252 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 253 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 254 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 The Optimized Database Format section on page 31 for more information), then you will be able to use the loops as answer lists in other questions.

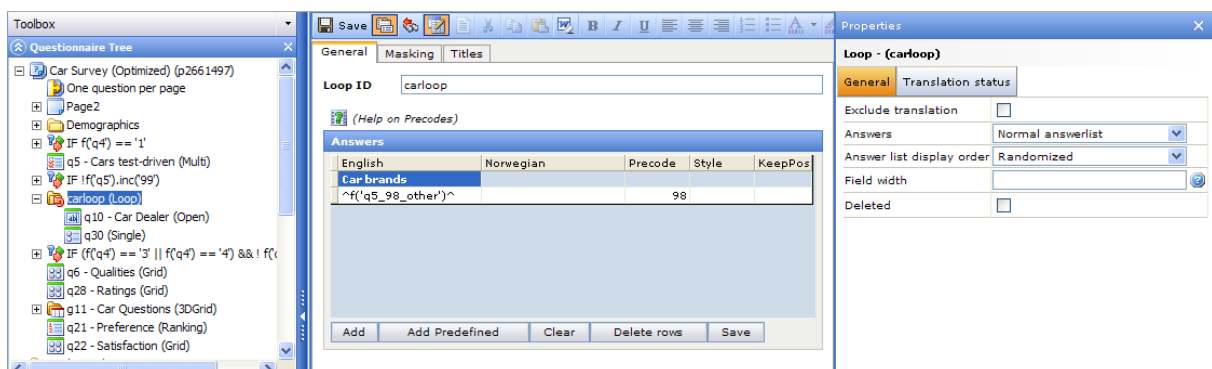


Figure 255 Example of a Loop object

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 project (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 the Answers section on page 174 for more information).

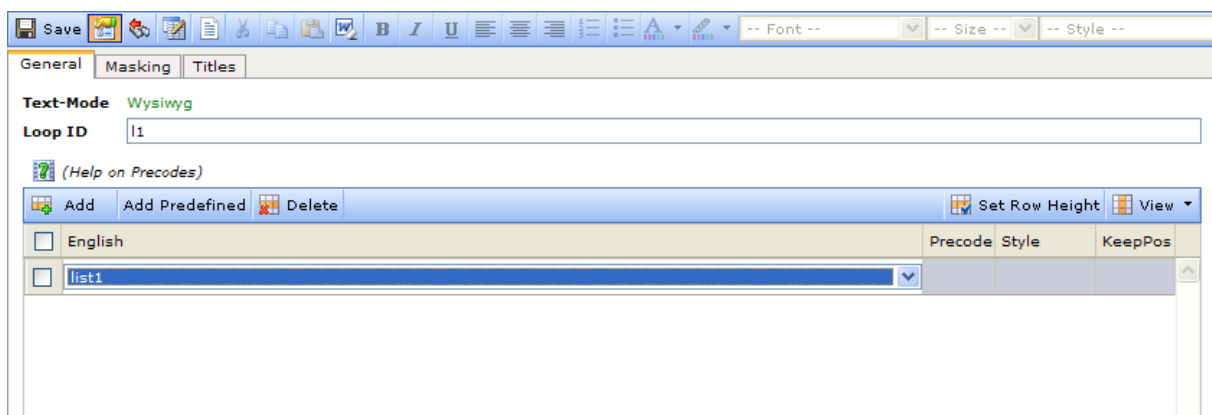


Figure 256 Example of the Loop Details page in DHTML mode

5. If required, apply masking such that the loop only operates under specified conditions (see the Masking section on page 182 for more information).

6. Open the loop's Properties page and set the properties as required (see the The Loop Properties Page section on page 211 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 project (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 The Loop Properties Page section on page 211 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 the Using Table or Hierarchy Lookups in the Questionnaire section on page 298 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 the Answers section on page 174 for more information), then save the changes.

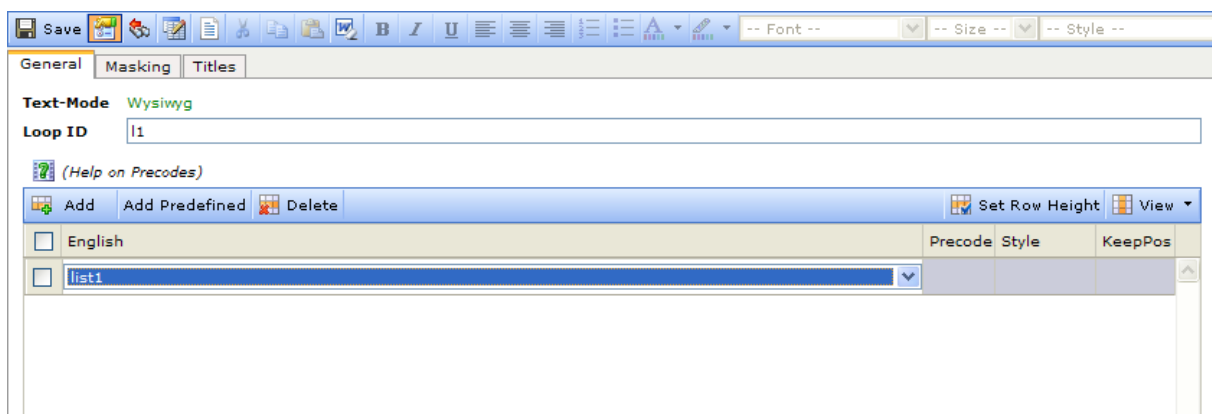


Figure 257 Example of the Loop Details page in DHTML mode with Normal Answer List selected

6. If you select Table Lookup, then the Schema Name page opens.

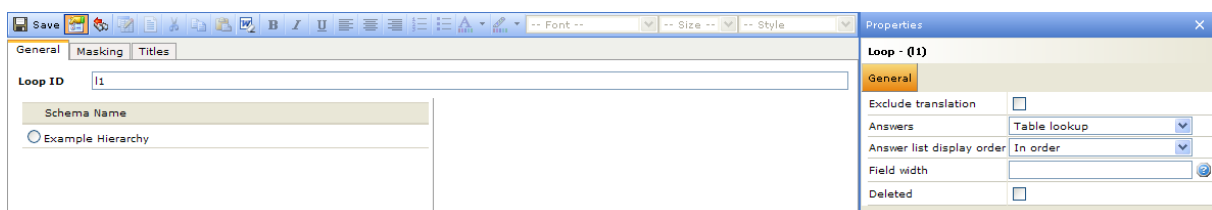


Figure 258 Example of the Loop Details page when Table Lookup is selected.

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 the Masking section on page 182 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. 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 project. 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 the Languages section on page 183 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 the APPENDIX A: LIMITS section on page 607 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 the HTML Styles section on page 83 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 the Code and Scale Masks / Filtering Answer Lists / Scales section on page 324 for more information).

7.4.8.4. The Loop Properties Page

The properties available for loops are as follows:

- **Exclude Translation** – Allows you to exclude certain questions from the translator interface (see the Translator section on page 302 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:
 - o **Normal Answer List** (default) - a normal list of answers is used.
 - o **Table Lookup** - Table Lookup answers are used (see the Using Table or Hierarchy Lookups in the Questionnaire section on page 298 for more information).
 - o **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.

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.

- **Answer list display order** - this property controls the order that the list items appear in:
 - o **In order** – in the order that they appear in the list.
 - o **Randomized** – in pseudo-random order (see the Randomization section on page 196 for more information).

- o **Rotated** – the list is shifted and rotated by one position for each new response.
- o **Flipped** - will alternate between displaying the list top-bottom or bottom-top for different respondents.
- o **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 the Editing the Routing section on page 231 for more information), you can undelete the object by unchecking this flag.

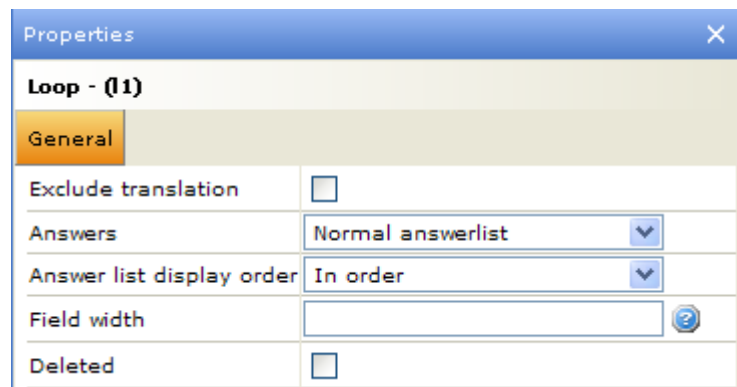


Figure 259 The Properties list for the Optimized Database format

7.4.9. 3D – Grid

A 3D grid is a questionnaire folder object. This object allows you to combine various question types into one object with a grid layout, thus enabling a more compact rendering. In a 3D Grid, all questions share the same answer list.

The 3D grid object can contain the following question types:

- Single question.
- Multi question/Multi question with Open Text or Ranked property.
- Grid question/Grid question with Ranked or Drop-down property.

7.4.9.1. How to Add a 3D Grid Object to a Questionnaire

Drag a 3D grid object from the **New Objects** toolbox or right-click on the destination object and select **3D Grid** from the Insert menu. The 3DGrid object is added to the Questionnaire Tree .

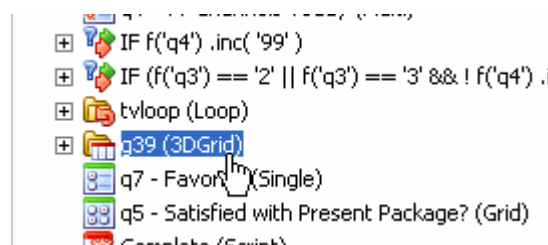


Figure 260 A 3D grid in the questionnaire

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 the Question Properties section on page 183 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 the How to Highlight Error Cells section on page 214 for more information).

7.4.9.2. How to Edit a 3D Grid

Once you have added a 3D grid object to your routing, edit it by double-clicking it, or right-clicking it and choosing **Edit** or **Properties** from the menu. In the **Answers** tab you enter the answer list that will be shared by all the questions that will be added to the 3D grid. In the **Text** tab enter the question text that also will be common for all the elements in the 3D grid. The menu and properties are the same as for the other types of question (see the The Object Types section on page 161 for more information).

Now you can drag questions from the New Objects toolbox and drop them into the 3D grid. The dashed line indicates the destination where the dragged object will be placed. To drop an item into the 3D Grid folder, point to the folder icon with the mouse pointer (the 3D Grid will be highlighted). You can also right-click on the 3D Grid and choose from the **Insert (Inside)** menu.

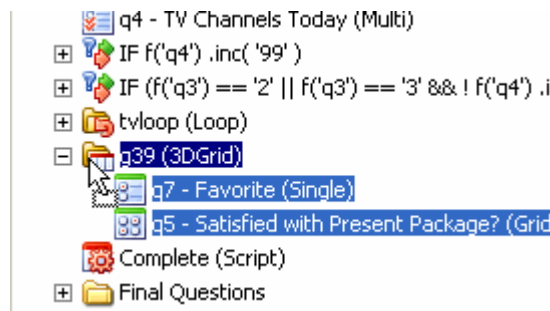


Figure 261 Dropping Items Into a Folder

Edit the questions in the 3D grid by double-clicking them, or right clicking the object and choosing **Edit** from the menu. You will notice that there is no **Answers** tab for Single, Multi and Grid questions in the menu. The text you wish to appear above each of the questions in the 3D grid, for example *Which cars have you test-driven?*, *Which car do you own?*, *Evaluate the cars* etc. (see the figure below), must be entered in the Text field for these questions.

The figure below shows how a 3D grid consisting of a Multi question, a Single question and a Grid question with a drop-down property chosen, will look in an interview.

Cars2

Please, answer the following questions about cars:

	Which cars have you testdriven?	Which car do you own?	Evaluate the cars:
Volvo	☐	☐	Please select your answer ▼
Saab	☐	☐	Please select your answer ▼
BMW	☐	☐	Please select your answer ▼
Audi	☐	☐	Please select your answer ▼
Ferrari	☐	☐	Please select your answer ▼
Fiat	☐	☐	Please select your answer ▼

Powered by confirmit

Figure 262 A 3D grid object in a survey

7.4.9.3. How to Highlight Error Cells

When answering 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 answered correctly. You can therefore set a property such that "error" cells are highlighted in another color. 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**.
3. Give the new style a logical name, for example "griderrorcell".
Note that this new style will be project-specific.
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, for example #ff6666.

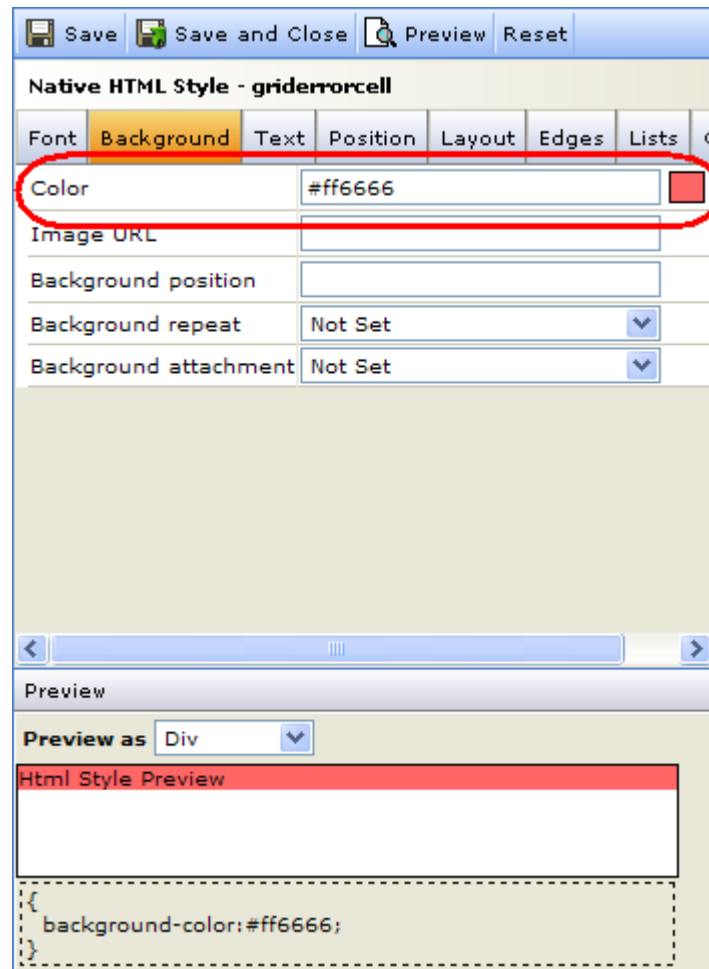


Figure 263 Setting the background color for the style

6. Click **Save and Close**.
7. Return to the page containing the grid question. and go to the **Preview** tab.
8. Click the **Edit the Question Skin** link to open the Question Skin Editor page (see the Shortcut to Style Editing section on page 85 for more information).
9. Double-click the **Question Form Inputs** element or right-click and select **Properties** to open the element's Properties page.
10. Go to the **Grid** tab, and in the Grid Table Error Cell Style field, type in the name of the style you have created above.

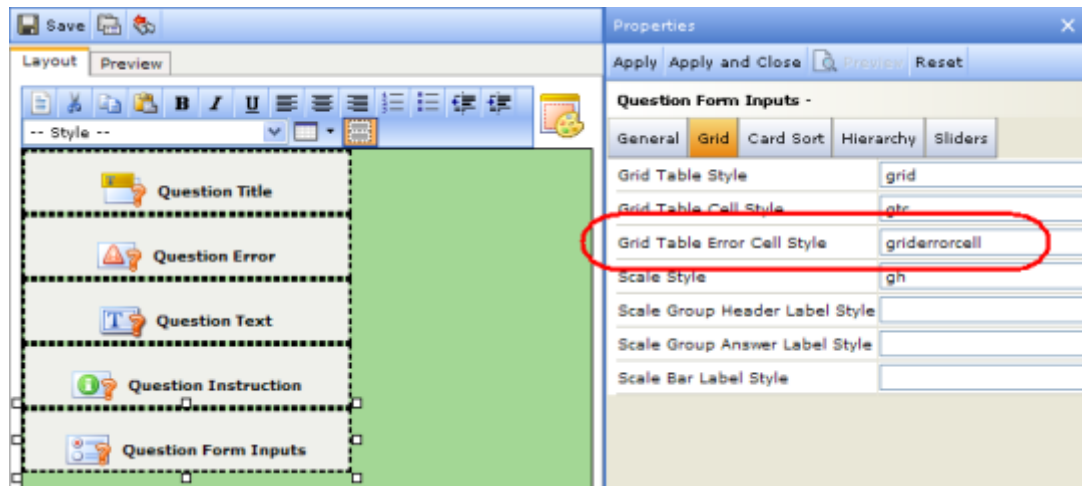


Figure 264 Specifying the Grid Table Error Cell Style

11. Click **Apply and Close** for the Properties page, then save the changes for the question skin.
12. Now you must go to the **Survey Settings > Layout** tab and check the **Highlight cells in grid that fail "Answer required" checks** box (located towards the bottom of the page), and 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.

7.4.10. Blocks

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 CallBlocks (see below).
 - 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 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 CallBlock object placed in the questionnaire tree. When the respondent works their way through the questionnaire and they come to a CallBlock object, the CallBlock 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 CallBlock, and the questionnaire will continue.

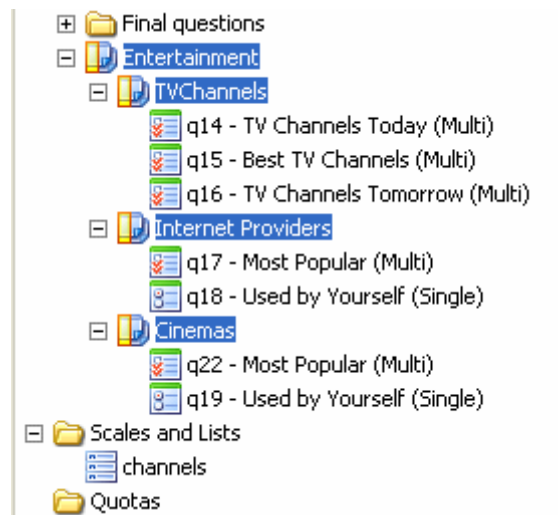


Figure 265 Blocks within blocks

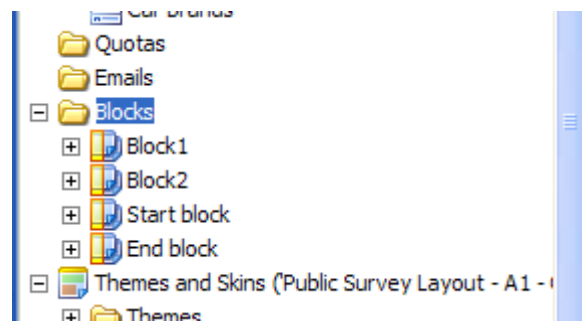


Figure 266 The Blocks folder in the questionnaire tree

Any number of "external" Blocks can be added to the routing (see the How to Create an External Block section on page 218 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 CallBlocks in the questionnaire tree. For the questions inside the block, any answers entered during previous executions of the block will remain. The CallBlock objects can themselves be activated by for example scripting within other questions in the tree. The Blocks folder in the routing contains two "special case" blocks by default: StartBlock and EndBlock - see below for descriptions.

- **StartBlocks** - a StartBlock 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 StartBlock will always be the first things that are processed when the respondent starts the questionnaire. The StartBlock 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. On returning to the questionnaire, the StartBlock will present the answers that the respondent has entered previously. The respondent can then change those answers as required. A StartBlock cannot be deleted from the Questionnaire tree. If no questions are added to the StartBlock, then it will be ignored.
- **EndBlocks** - an EndBlock 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 EndBlock will always be the last things that are processed when the respondent completes the questionnaire. The questions contained within the EndBlock 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 EndBlock will present the answers that the respondent has entered previously. The respondent can then change those answers as required. An EndBlock object cannot be deleted from the Questionnaire tree. If no questions are added to the EndBlock then it will be ignored.

- **CallBlocks** - CallBlocks are used to call or activate a ProcedureBlock. You can place a CallBlock anywhere within the questionnaire routing. When the respondent works their way through the questionnaire and reaches the CallBlock, the CallBlock diverts the routing to the specified ProcedureBlock and the questions within that ProcedureBlock are presented to the respondent. Once the respondent has answered the questions in the selected ProcedureBlock, he/she is returned to the questionnaire, to the point at which they left it to process the ProcedureBlock. The respondent can then continue with the questionnaire. You can add as many CallBlocks as you wish to a questionnaire. These CallBlocks can then refer to any ProcedureBlocks, and can specify the same ProcedureBlock more than once.

Important:

Background variables (see the **Use of Background Variables** section on page 385 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 StartBlock if background variables are needed in the StartBlock. The background variables **MUST** then be placed at the beginning of the StartBlock such that they are passed first when the interview opens.

Note: The Block, StartBlock, EndBlock and CallBlock functionality is only available when the project uses the Optimized Database format (see the **The Optimized Database Format** section on page 31 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 > 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 or right-click on it and choose **Edit** from the menu to open the Block's Properties page.

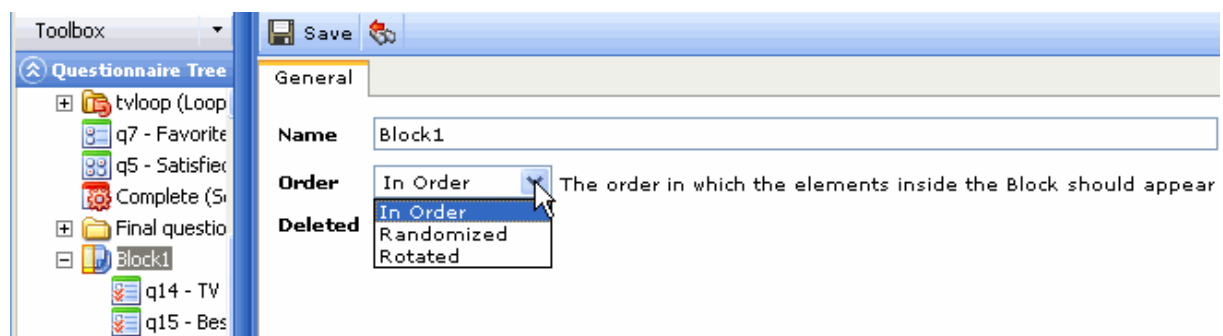


Figure 267 Setting up a Block object

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 **Blocks** folder in the Questionnaire Tree. You can then call these blocks by adding a CallBlock to the appropriate place in the questionnaire (see the **How to Create a CallBlock** section on page 219 for more information). You can create any number of Blocks:

1. Right-click on the **Blocks** folder and select **Insert Block** from the menu, or drag a **Block** object from the New Objects toolbox and drop it into the **Blocks** folder.



Figure 268 Inserting a new Block into the 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 the How to Add New Objects to the Questionnaire Tree section on page 160 for more information).

Any objects added to the Block will be run when the Block is activated by a CallBlock in the questionnaire.

3. Double-click on the Block to open its properties page.

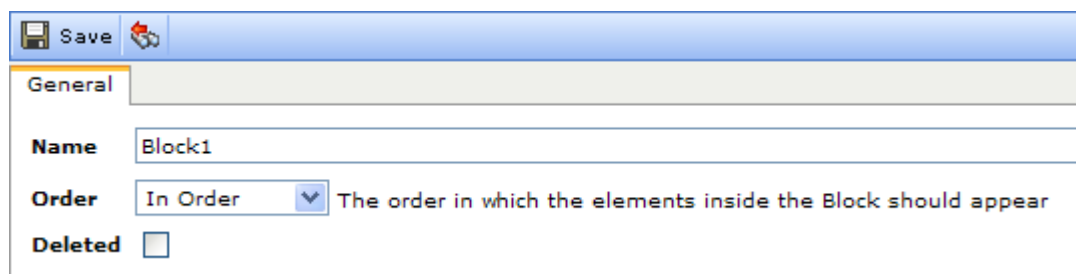


Figure 269 The Block Properties page

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 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 the down-arrow beside 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 unchecking the box (see the Deleting Objects section on page 232 for more information).

7.4.10.3. How to Create a CallBlock

CallBlocks are used to call or activate Blocks that have been created in the Blocks folder external to the questionnaire tree (see the How to Create an External Block section on page 218 for more information). You can create CallBlocks anywhere in the Questionnaire tree.

1. Right-click in the appropriate place in the questionnaire tree and select **Insert > CallBlock** from the menu. A CallBlock object is added to the tree.
2. Double-click on the CallBlock object in the tree to open its properties page.

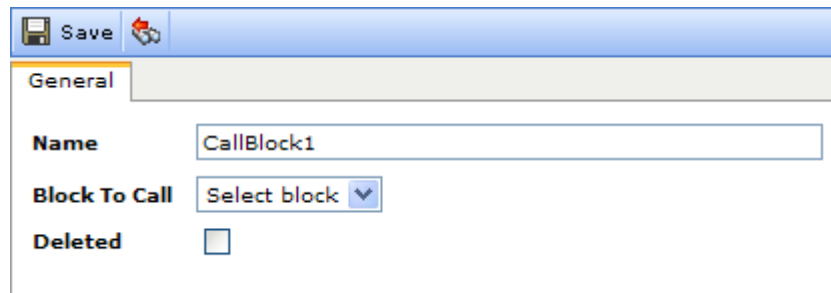


Figure 270 The CallBlock Properties page

3. Edit the name if required and select the Block that is to be called, then click **Save** to save the changes.

The properties are as follows:

- **Name** - the name of the CallBlock. By default the blocks will be named CallBlockX where X is the number in which it was created. You can rename the block as desired.
- **Block to Call** - the ProcedureBlock that is to be activated by this CallBlock. Click the down-arrow beside the field and select the desired Procedure Block from the list. All Procedure Blocks in the Blocks folder, and the Start and End Blocks, are listed.
- **Deleted** - if the CallBlock has been deleted from the tree and you wish to reinstate it, undelete it by unchecking the box (see the Deleting Objects section on page 232 for more information).

7.4.11. Page

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 the Dynamic Questions section on page 330 for more information).

Pages can be used inside Blocks. Pages can also be used in combination with Question masking (see the Confirmit Scripts section on page 316 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.

The screenshot shows the 'General' tab of a page object configuration window. At the top, there are 'Save' and 'Help' icons. The 'Name' field contains 'Page1'. The 'Order' dropdown is set to 'In Order', with a tooltip that reads 'The order in which the elements inside the Page should appear'. The 'Theme' and 'Page layout' fields are empty dropdown menus. The 'Deleted' checkbox is unchecked. Below the main configuration area, there is a section for the 'English' language, which contains a large text area for the 'Title'.

Figure 271 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.
- **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 the Editing the Routing section on page 231 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 (see the The Survey Channels Tab section on page 355 for more information), 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.

The screenshot shows the 'General' tab of a telephony object configuration window. At the top, there are 'Save' and 'Help' icons. The 'Name' field contains 'Telephone17'. The 'Command type' dropdown is set to 'Dial'. The 'Telephone variable' dropdown is open, showing options: 'Dial', 'Hang up', 'Allow', and 'Ignore dialing'. Below the main configuration area, there is a section for the 'English' language.

Figure 272 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 The CATI Options Tab section on page 364 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 check box. 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 273 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 The Email Properties and Settings section on page 223 for more information).
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 project; 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).
- **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 the Sending Email section on page 402 for more information).

Note: Users logged on to Confirmit with the Standard User permission have a different email setup interface (see the Sending Email as a Standard User section on page 417 for more information).

If you duplicate the questionnaire, the Invitation and Reminder Email folder will be included in the copy of the project. 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 the Translator section on page 302 for more information). This means that email texts and setups can be stored and reused in all project 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.

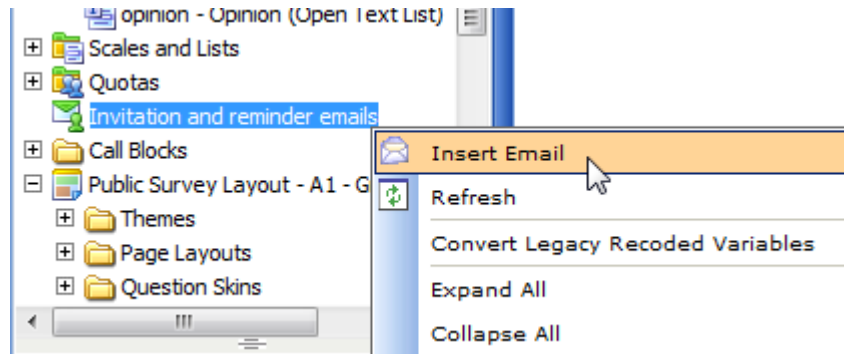


Figure 274 Inserting an Email object

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.

Text

Text-Mode Wysiwyg

Id e1

Deleted ☐

Read only ☐

Include link ☐

Use HTTPS ☐

Send as HTML ☒

Send as plain text ☒

Additional survey link parameters

Custom headers

Override recipient email ☐

Send email FW ☐

Send confirmation email ☐ documentation@confirmit.com

From documentation@mail.firmex.local

Display Name Adam Apple

Reply to documentation@confirmit.com

Default language None

Disable update of noOfEmailsSent ☐

English

Encoding: Western European (ISO)

Activate language ☒

Subject

General request

HTML body

Dear respondent

Here is the survey.

Plain text body

Dear respondent

Here is the survey.

Custom survey link text

Figure 275 Editing an Email object

2. Select the properties and options, and add the addresses as required (see the The Email Details Page Properties and Fields section on page 407 for more information).
3. Save the changes.

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).
- **Use HTTPS** – the URLs will use https:// for secure links instead of http://.

Note: On-Premise Customers must obtain and install an SSL Secure Certificate on their servers to enable this option. This option will be activated after you have chosen the Include link option.

- **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 project 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 the Fixed Sender Domain and Email Delivery Report Functionality section on page 405 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.
- **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**. 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 the Handling Respondents in Limited Surveys section on page 384 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 On-Demand 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 the Email Delivery Report section on page 413 for more information).

This means that if you are working in the On-Demand 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 On-Demand 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.

7.4.15. The Chart Object

The Chart object can be used in all surveys that use Survey Layouts (see the Survey Layouts section on page 50 for more information), and it is also used as the "results presentation mode" in Poll surveys (see the Poll Projects section on page 249 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.

When you create a Poll, a chart object is automatically included on the second page of the Poll survey. For other projects 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 276 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:
 - o **HTML** - (default) only bar charts can be rendered.
 - o **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 the Survey Layouts section on page 50 for more information).

7.6. Secondary Project

In Survey Designer you have the possibility to copy questions from other projects into the current project. This can be done in the Secondary Project toolbox. Projects in this toolbox will be displayed in Read Only mode.

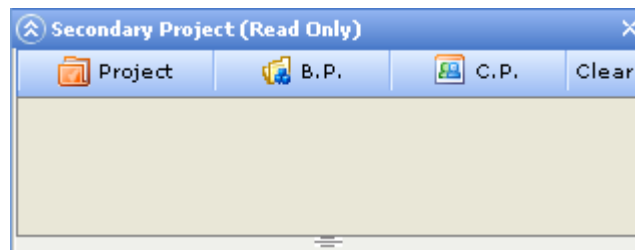


Figure 277 The Secondary Project toolbox

To find the project or panel you wish to add, open in this toolbox and click the **Project**, **B.P.** (Basic Panel) or **C.P.** (Community Panel) button as appropriate. To remove a questionnaire tree/project from the toolbox, click the **Clear** button.

Note: When working with a project that is linked to a Community panel, the Community Panel will automatically open in the Secondary Project toolbox, and you can drag-and-drop variables from the Community Panel to the survey. The variables dragged into the survey will automatically be set as visible panel variables (see the The General Tab section on page 184 for more information).

When you click the **Project**, **B.P.** or **C.P.** buttons, a pop-up window displaying all projects or panels is displayed as shown below.

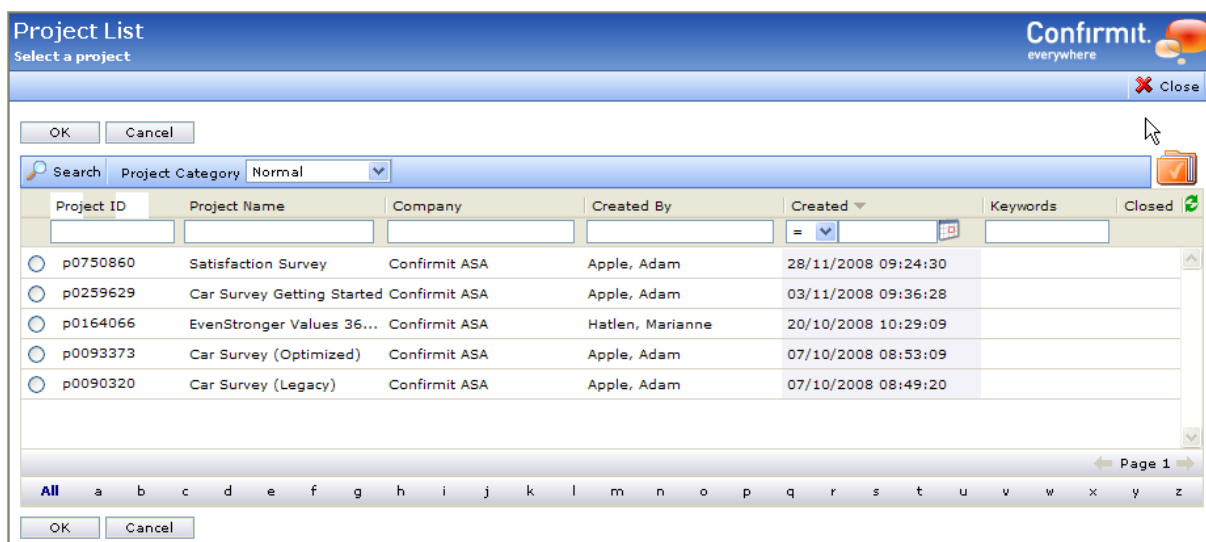


Figure 278 Example of the Project List pop-up

In this pop- up window you can search for and select the project from which you want to reuse questions, and click **OK**. The project questionnaire tree opens in the Secondary Project toolbox.

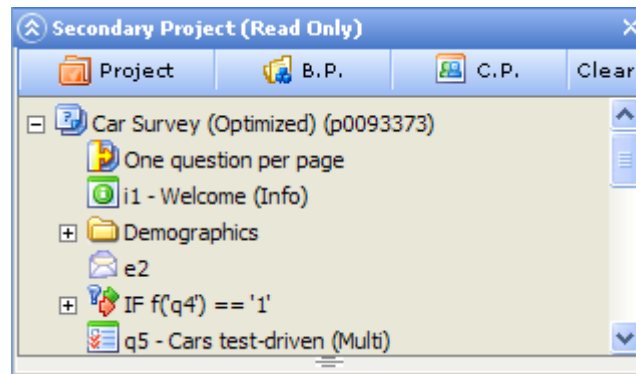


Figure 279 Example of the Secondary Project questionnaire tree

Now you can copy questions into the current questionnaire by dragging them from the secondary project toolbox and dropping them into the questionnaire tree. Before copying, you can view the Secondary Project objects in Edit mode.

Note: When the Secondary Project toolbox is opened it will contain the last secondary project selected by the current user, wherever the user logs in.

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. 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 the **Question Properties** section on page 183 for more information).

7.7.2. 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.

7.7.3. 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 the Moving an Object section on page 231 for more information). You can also hold the mouse pointer over the folder while moving the objects to drop them into the folder.

7.7.4. 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 project. 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 project 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 the Question Properties section on page 183 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.

7.7.5. 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 project 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, using standard Windows techniques, 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.

The screenshot shows the Grid View interface with three node forms. The top form, 'i1 (Info)', has an orange title bar and contains fields for Title (Welcome), Text (Welcome to this survey about cars.), and Instruction. Below it is a 'Question mask' field. The middle form, 'Demographics (Folder)', is collapsed. The bottom form, 'q2 (Open)', is expanded and shows fields for Title (Name), Text (Please enter your name.), and Instruction. Below these are 'Question mask' and 'Validation code' fields. To the right of these fields are 'Properties' sections. The first 'Properties' section includes 'Rows' (1), 'Columns', 'Field width' (20), 'Password' (checkbox), 'Variable type' (Normal), and 'Not required' (checkbox). The second 'Properties' section includes 'Bitstream variable' (checkbox) and 'Question category'.

Figure 280 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 the Grid View Search and Replace section on page 238 for more information).
- **Filter** - opens a drop-down list of the various filter options available (see the Using the Filter Options section on page 237 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.

Gender (Single)

Title	Text	Instruction
Gender	What gender are you?	
en		
no		

English	Norwegian	Code	Score	RdgSingle%	BgColor	Style	KeepPos	Other
Male		1					☐	☐
Female		2					☐	☐

Add Add predefined Clear Delete rows

Code mask

Question mask

Validation code

Properties

List rows

List columns

Field width

Other box rows

Other box columns

Opentext coding ☐

Drop down ☐

Properties

Indexed ☒

Answer list display order In order

Group display order In order

Variable type Normal

Not required ☐

Question category

Figure 281 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.

i1 (Info)

Title	Text	Instruction
When all else fails...	<p>Thank you for giving us your feedback. This will help us to improve the Confirmit User Documentation, thereby	Click >> to proceed with the survey.
en		
no		

Question mask

Figure 282 Information Node Grid View

This shows a Grid View of an Open Text question:

q23 (Open)

Title	Text	Instruction
Why not	Please add a few wrds to tell us why you do not use the documentation.	

en

no

Question mask

Validation code

Properties

Rows

Columns

Field width

Password ☐

Variable type

Not required ☐

Properties

Bitstream variable ☐

Question category

Figure 283 Open Text Grid View

This shows a Grid View of a Grid question:

q6 (Grid)

Title	Text	Instruction
Qualities	Please indicate how important the following qualities are to you when choosing a car.	1 means "Not important" 5 means "Very important"

en

Answers

English	Code	KeepPos	Other
Comfort		☐	☐
Price		☐	☐
Safety		☐	☐
Speed		☐	☐

Scales [More scales](#)

English	Code	Score	ColWidth	BgColor	Style	KeepPos	Other
1		1	77	red		☐	☐
2		2	77	orange		☐	☐
3		3	77	yellow		☐	☐
4		4	77	lightgreen		☐	☐
5		5	77	green		☐	☐

Code mask

Question mask

Scale mask

Validation code

Properties

Answer column width

Unit of measure

Field width

Other box rows

Other box columns

Answer list display order

Group display order

Scale display order

Variable type

Drop down ☐

Properties

Not required ☐

Question category

Figure 284 Grid Question Grid View

This shows a Grid View of a Reusable Scale/List folder:

Exclude translation ☐

Use images in answers ☐

Answers [More answers](#)

English	Code	Score	BgColor	Style	KeepPos	Other
American						
Ford				☐	☐	☐
Chrysler				☐	☐	☐
European						

Add **Add predefined** **Clear** **Delete rows**

Figure 285 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:

Expression

f('q4') == '1'

(Stop)

Interview status after stop node Screened

Exclude translation ☐

Title	Text
Thank you	Thank you but you do not meet the criteria set up for this survey.

Figure 286 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.

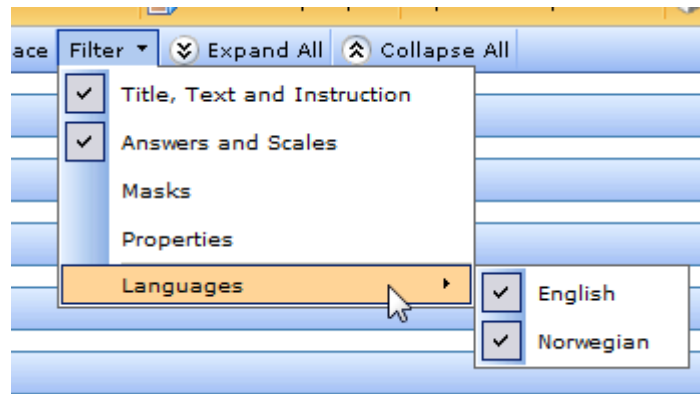


Figure 287 The Grid View Filter options

2. Click on the various options to toggle the selection on and off. Under Languages, all the languages selected for the project 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.

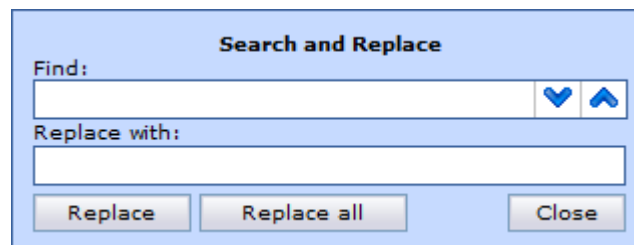


Figure 288 The Grid View Search and Replace input dialog

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 .

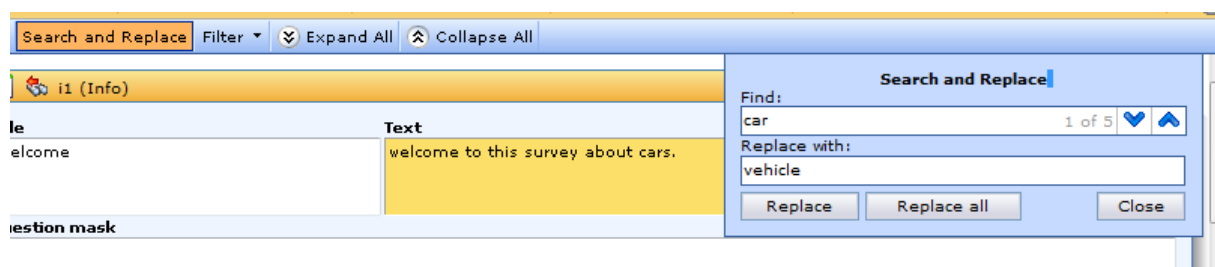


Figure 289 Using Search and Replace

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 project 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 project by highlighting the project 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. Using standard Windows techniques, 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 290 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 project 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.

The screenshot displays the Confirmit 16 Authoring User Guide interface. At the top, a toolbar contains buttons for 'Save', 'New search...', 'Search and Replace', 'Filter', 'Expand All', and 'Collapse All'. Below the toolbar, a search result for 'i1 (Info)' is shown. This result is presented in a table with three columns: 'Title', 'Text', and 'Instruction'. The 'Title' column contains the text 'When all else fails...', the 'Text' column contains the text '<p>Thank you for giving us your feedback. This will help us to improve the Confirmit User Documentation, thereby', and the 'Instruction' column contains the text 'Click >> to proceed with the survey.' Below this table, there is a section for 'Question mask' and a section for 'Answers'. The 'Answers' section shows a table with columns for 'English', 'Norwegian', 'Code', 'Score', 'RdqSingle%', 'BqColor', 'Style', 'KeepPos', and 'Other'.

Figure 291 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 the Grid View section on page 232 for more information).

7.12. Spell Checker

Note: Spell Checker is based on third party software and is a chargeable Add-On.

The Spell Checker functionality enables Project Managers to check all entered text (both questions and answers) in a project for spelling errors. The functionality allows you to check one question at a time.

7.12.1. Supported Languages

The following languages are supported by Spell Checker (in alphabetical order):

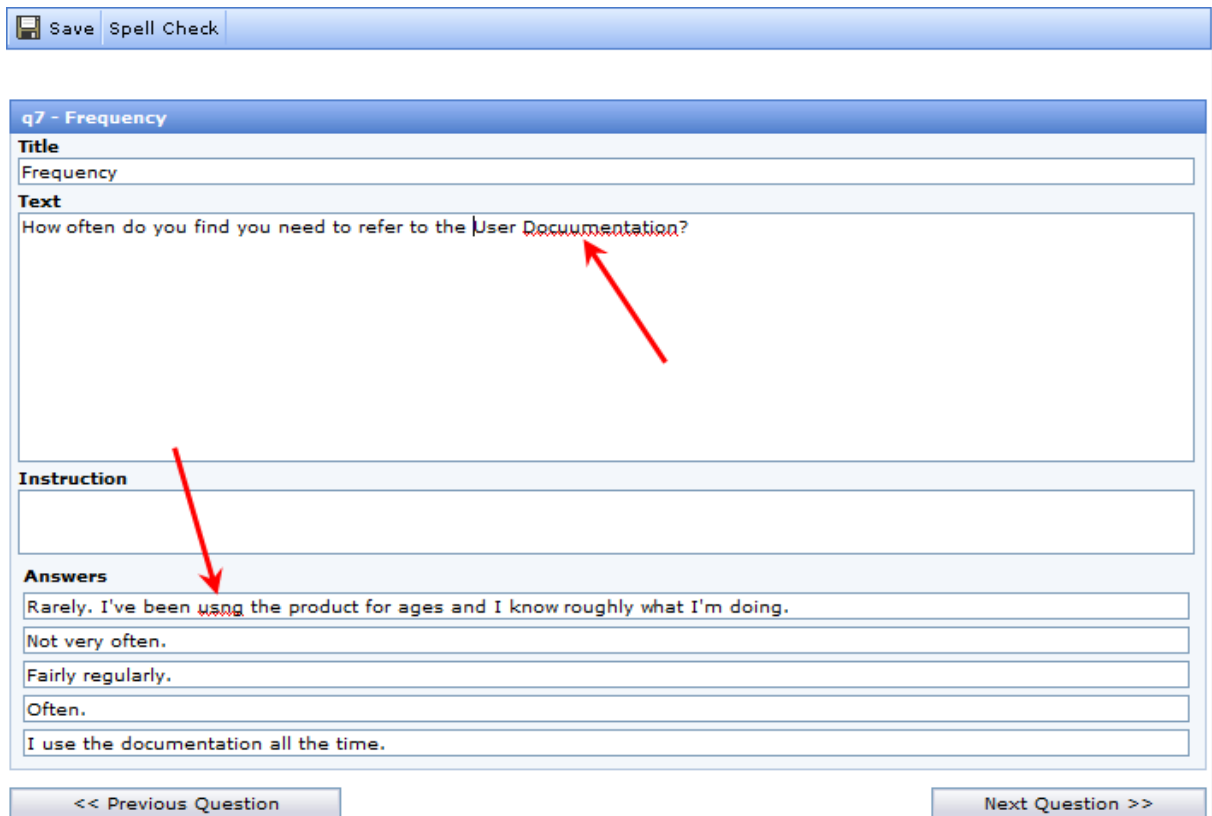
Language	Country
Afrikaans	South Africa
Bulgarian	Bulgaria
Catalan	Spain
Croatian	Croatia
Czech	Czech Republic
Danish	Denmark
Dutch	Netherlands

Language	Country
English	Australia
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

7.12.2. 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.



Save Spell Check

q7 - Frequency

Title
Frequency

Text
How often do you find you need to refer to the User Documentation?

Instruction

Answers
Rarely. I've been using the product for ages and I know roughly what I'm doing.
Not very often.
Fairly regularly.
Often.
I use the documentation all the time.

<< Previous Question Next Question >>

Figure 292 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 project language is displayed in the Spell Checker page. If you want to check spelling for other project languages (see the Supported Languages section on page 240 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.

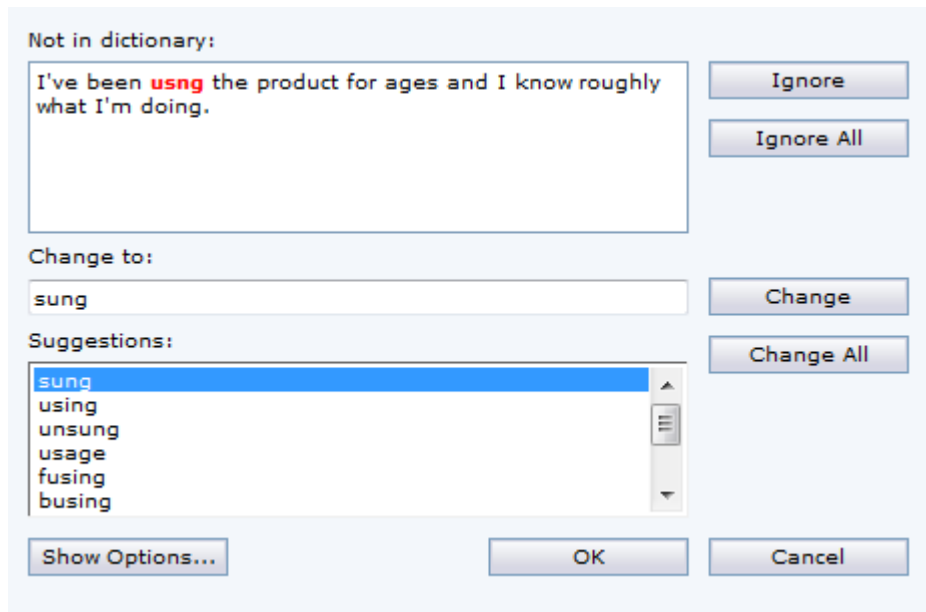


Figure 293 Using the spell checker

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.

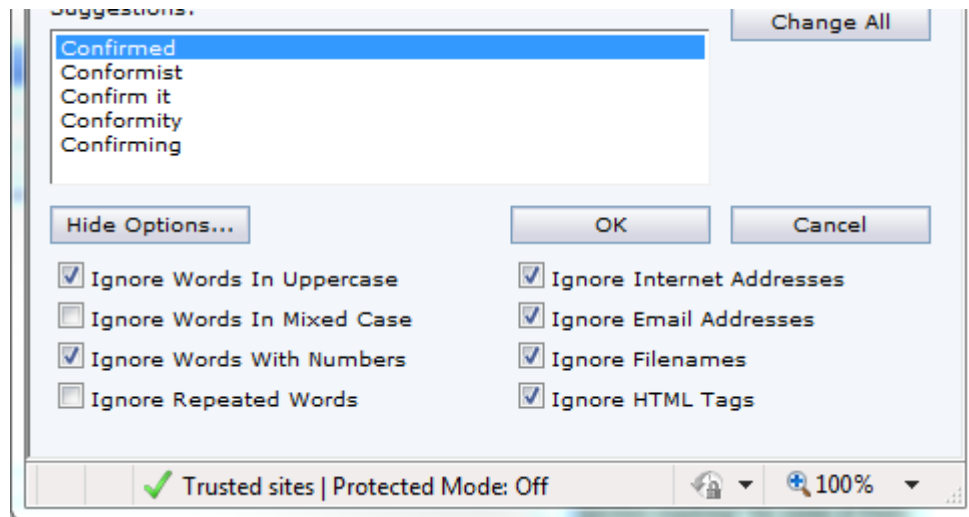


Figure 294 The Settings window

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.

7.13. Questionnaire Reviewer

This functionality enables Confirmit 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 Confirmit author, you can set up and send invitation emails to specified reviewers. Each email will include a link to your project. When the reviewer clicks the link he/she is taken directly to the project – the reviewer does not need access to Confirmit. The reviewer can then make changes to the project, 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 project owner, detailing the changes that have been made and who has made them. You then have the opportunity to check the changes.

7.13.1. How to Set up the Questionnaire Reviewer

1. When you are in the project 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.

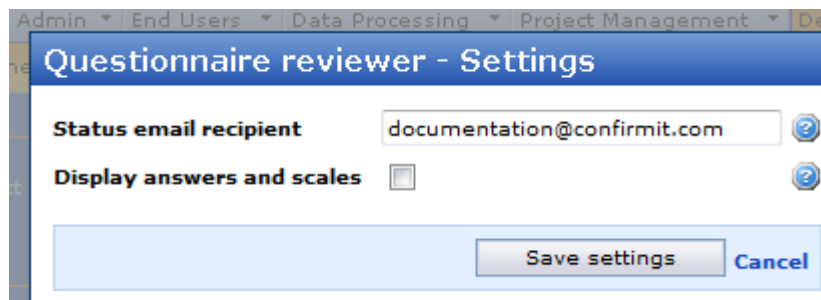


Figure 295 The Set Questionnaire Reviewer Settings dialog

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.

7.13.2. 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).

Admin ▾ End Users ▾ Data Processing ▾ Project Management ▾ Designer ▾ Resp.

Questionnaire reviewer - Emailing

Send email with link to Questionnaire Reviewer

From

To

Subject

Body
 Hi Belinda
 Here is the link to the survey. On completion, click End to close the reviewer. This will automatically send an email to me listing any changes you have made.
 Many thanks.
 Adam

Link Expires

Figure 296 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**.

7.13.3. The Questionnaire Reviewer Window

When the reviewer clicks the link he/she has received from you, the Confirmit Questionnaire Reviewer window opens.

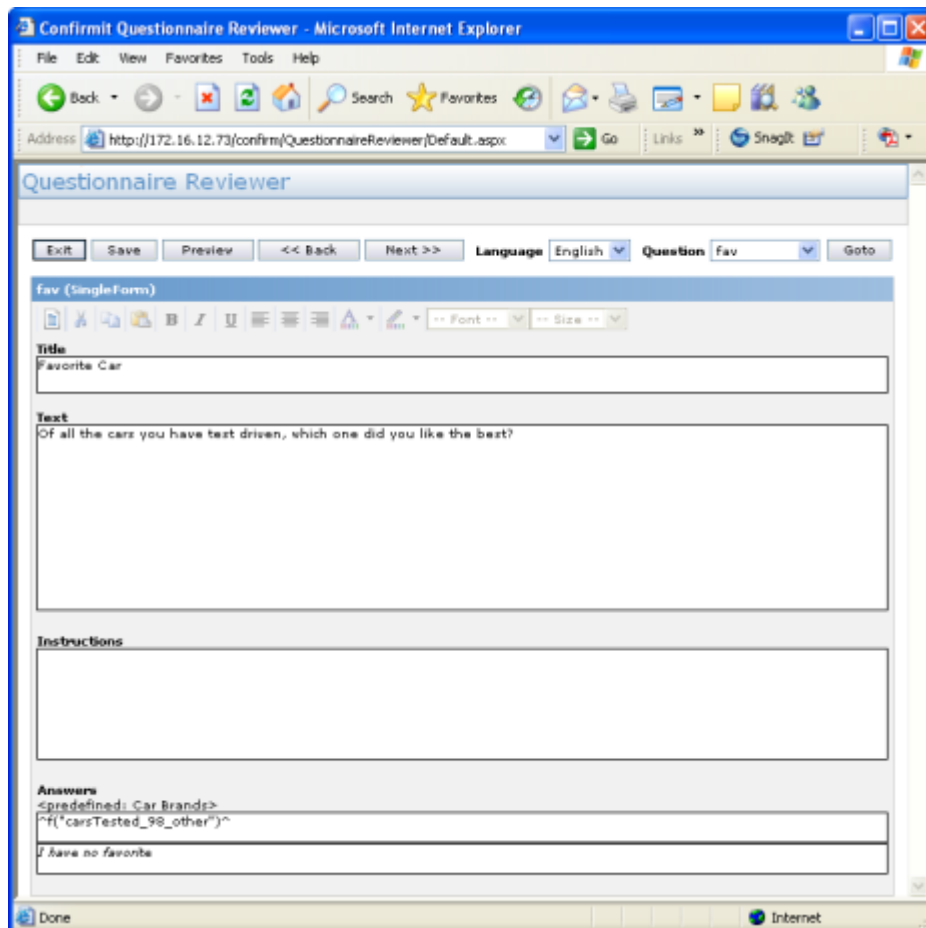


Figure 297 Example of the Confirmit Questionnaire Reviewer window

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 the How to Set up the Questionnaire Reviewer section on page 244 for more information).

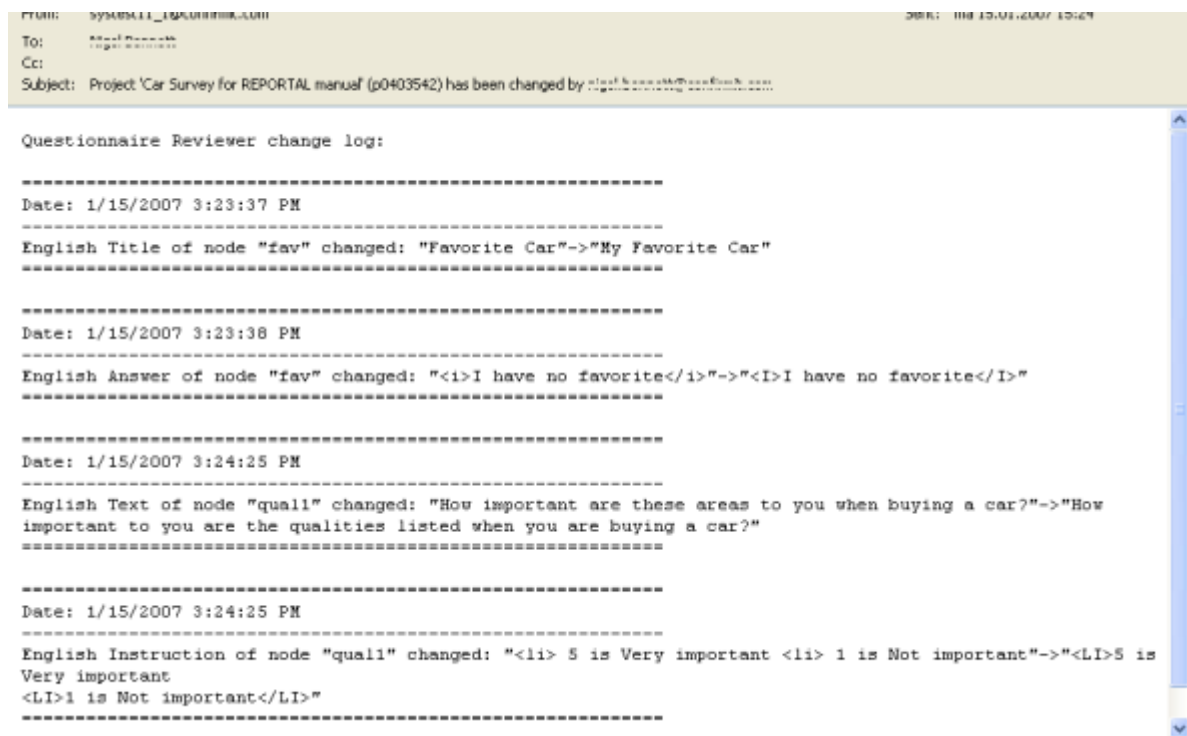


Figure 298 Example of a status email returned from a reviewer

The recipient of the status email can then check the changes that have been made.

8. Poll Projects

Polls are "limited" projects that allow only one question, and a chart (on in its own page) (see the The Chart Object section on page 228 for more information) to present the results. Polls make use of the Inline Survey functionality (see the The Inline Survey Options section on page 358 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 project:

1. In the **Home** menu, click **New > Poll**.

The New Poll overlay opens. Note that the preview appears once a survey layout is selected.

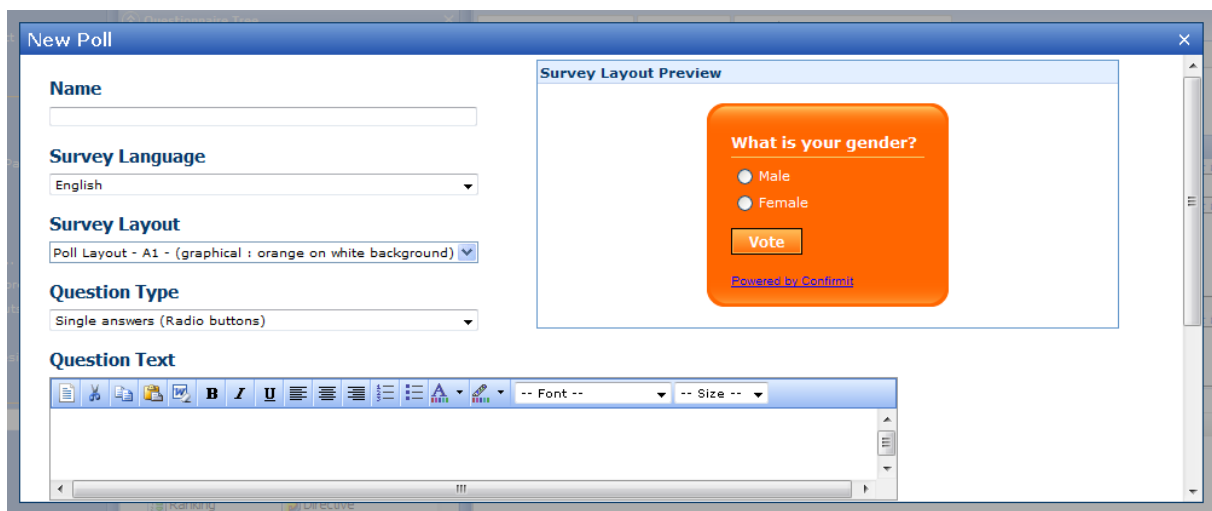


Figure 299 Example of the New Poll page

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 the Survey Layouts section on page 50 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" projects (see the Question Properties section on page 183 for more information). Note however that several options are disabled for Poll projects - you cannot for example add new questions, delete questions etc.

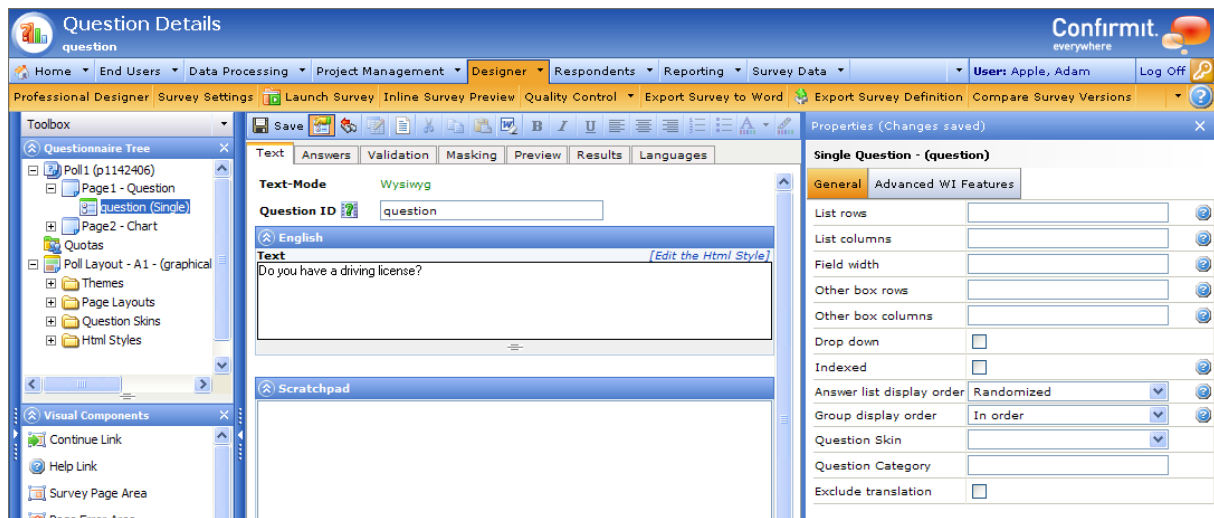


Figure 300 Example of the Question Details page for a Poll

Note: If you have the Community Panel functionality, you can link Polls to a Community Panel and embed the panel in your Community Portal. To do this, if you have created your Poll using the New Poll wizard, you can go back to the Project Overview page before you launch the Poll to set up a link to the Community Panel. This will automatically add "panelid" to the project

Note that the chart object (see the The Chart Object section on page 228 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.

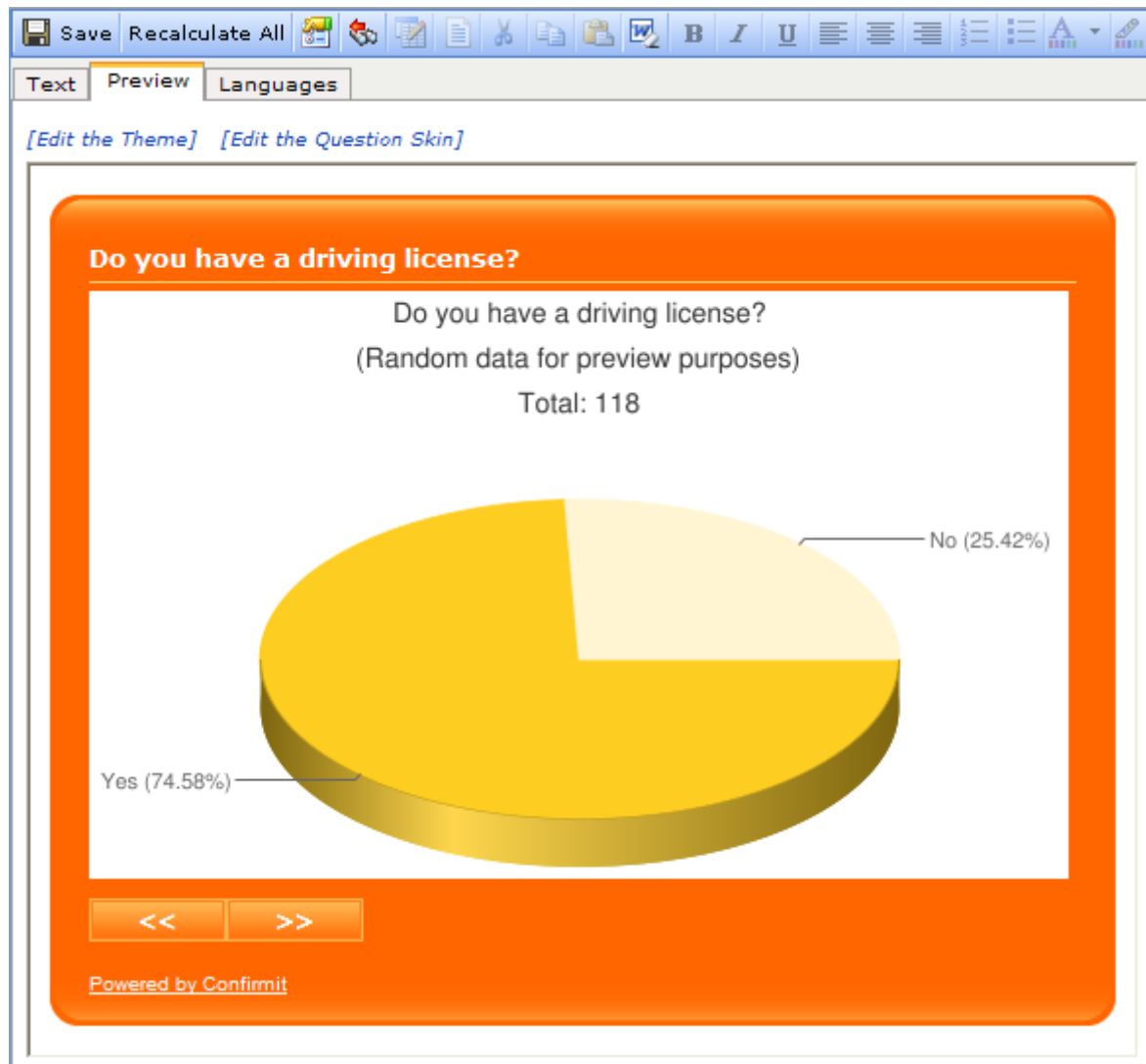


Figure 301 Example of the Chart Preview using random data

Once you have set up the chart as required, save the changes and launch the survey as normal (see the Generating the Response Databases - Launching section on page 371 for more information).

9. 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 project.

Note: You can set up different quota limits for the Test and Production databases. This allows you for example to test the project 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; 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 the Terminating the Interview for Respondents when Quota is Full section on page 274 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 the Optimistic Quotas section on page 269 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.

9.1. Two Alternative Views

The interface for quota definition in Confirmit can be presented in one of two ways: **Grid view** and **List view**.

9.1.1. How to Change Views

To change the view, right-click on the quota in the Questionnaire Tree toolbox and select **Edit in List View** or **Edit in Grid View** 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 View can at any time be opened in List View instead. A quota in List View can be opened in Grid View if it contains only single questions and the number of cells is below the limit for the maximum number of cells (see the The Grid View section on page 253 for more information).

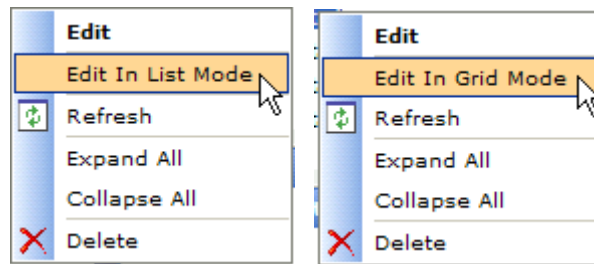


Figure 302 Changing to Grid View when in List View and vice versa

9.1.2. The Grid View

Grid view can be used when the quota consists of single questions only. This view 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 The Grid View Settings Tab section on page 255 for more information). Grid view 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.

Save Hide Counters Show Remaining Count Update Recalculate All Upload Limits

Quota Grid Settings

Enable Optimistic Quota ☐ Units Count ▾

Active Database **Production**

Gender:	Male	Female	Total
Age			
Under 18	25 0	21 0	46
18 to 30	32 0	35 0	67
31 to 50	35 0	38 0	73
51 to 67	25 0	25 0	50
68 or more			14 0
Total	117	119	236

The counters are displayed in green.

Figure 303 Example of a Grid View 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 the Hiding Unwanted Answer Alternatives section on page 264 for more information). If this method will not reduce the number of cells below the limit, consider using List View instead (see the The List View section on page 256 for more information).

9.1.2.1. Examples of Quotas using the Grid View

The grid view 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 shown below 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 red 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:

The screenshot shows the 'Quota Grid' interface. At the top, there is a toolbar with buttons: Save, Hide Counters, Show Remaining Count, Update, Recalculate All, and Upload Limits. Below the toolbar, there are tabs for 'Quota Grid' and 'Settings'. The 'Quota Grid' tab is active. Below the tabs, there is a section for 'Enable Optimistic Quota' with a checkbox and a 'Units' input field set to 0. A 'Count' dropdown menu is also visible. The main section is titled 'Active Database Production' in red. It contains a table with age groups and their corresponding targets and counts.

Age	Target	Count
Under 18	40	0
18 to 30	40	0
31 to 50	40	0
51 to 67	40	2
68 or more	40	0
Total	200	

Below the table, there is a yellow box with a message: 'The counters are displayed in green.'

Figure 304 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:

Save Hide Counters Show Remaining Count Update Recalculate All Upload Limits

Quota Grid Settings

Enable Optimistic Quota ☐ Units Count ▾

Active Database **Production**

Gender:	Male	Female	Total
Age			
Under 18	25 0	21 0	46
18 to 30	32 0	35 0	67
31 to 50	35 0	38 0	73
51 to 67	25 0	25 0	50
68 or more			14 0
Total	117	119	236

The counters are displayed in green.

Figure 305 Quota with two questions

In the above example, the user again requires a total of 200 responses, however this time the responses are to be divided both by age group and gender. For example, in the 51 to 67 age group the user wants replies from 30 male and 30 female respondents.

This figure shows an example of a quota based on three questions:

Save Hide Counters Show Remaining Count Update Recalculate All Upload Limits

Quota Grid Settings

Enable Optimistic Quota ☐ Units Count ▾

Active Database **Production**

PrincipleTask:	Employee Feedback			Market Research			Customer Feedback			Total		
Gender:	Male	Female	Total	Male	Female	Total	Male	Female	Total	Male	Female	Total
Age												
Under 18	5 0	5 0	10	10 0	10 0	20	5 0	5 0	10	25 0	20 0	40
18 to 30	10 0	10 0	20	10 0	10 0	20	10 0	10 0	20	30 0	30 0	60
31 to 50	10 0	10 0	20	10 0	10 0	20	10 0	10 0	20	35 0	30 0	60
51 to 67	10 0	10 0	20	10 0	10 0	20	10 0	10 0	20	30 0	30 0	60
68 or more	5 0	5 0	10	5 0	5 0	10	5 0	5 0	10	10 0	10 0	30
Total	40	40	80	45	45	90	40	40	80	125	125	250

The counters are displayed in green.

Figure 306 Example of a quota with three questions

Here, the user wants a total of 250 responses, specified by age group, gender and task.

9.1.2.2. The Grid View Settings Tab

In the Grid view'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 307 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 the Email Alert on Full Quota section on page 274 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.

9.1.3. The List View

In **List view**, 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 the Defining the Quota Values in List View section on page 265 for more information).

List view 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 view easier and faster to use.

Save Update Recalculate All Upload Limits						
Quota List Settings						
Enable Optimistic Quota ☐ Units 0 Count Count						
Active Database Production						
Delete Add Add All Edit						
☐	Age (Age)	Gender (Gender)	PrincipleTask (EF MR or CF)	Prod. Limit	Counter	Remaining
☐	Under 18	Male	[Any]	25	0	25
☐	Under 18	Female	[Any]	20	0	20
☐	18 to 30	Male	[Any]	30	0	30
☐	18 to 30	Female	[Any]	30	0	30
☐	31 to 50	Male	[Any]	35	0	35
☐	51 to 67	Male	[Any]	30	0	30
☐	31 to 50	Female	[Any]	30	0	30
☐	51 to 67	Female	[Any]	30	0	30
☐	68 or more	Male	[Any]	10	0	10
☐	68 or more	Female	[Any]	10	0	10
☐	Under 18	Male	Employee Feedback	5	0	5
☐	18 to 30	Male	Employee Feedback	10	0	10
☐	31 to 50	Male	Employee Feedback	10	0	10
☐	51 to 67	Male	Employee Feedback	10	0	10
0 of 40 selected.						

Figure 308 Example of a List View table with two single questions

For system performance reasons a limit for the maximum number of columns (variables) that can be displayed in list view is enforced. However, as it is possible to hide columns from the view, 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 View can at any time be opened in List View instead. A quota in List View can be opened in grid view 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 View, 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 view, the quota fields are read-only when a quota is reopened. To modify one or more quota cells, select the check box next to the row and then click the **Edit** button.

9.1.3.1. Grid Questions in List View

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.

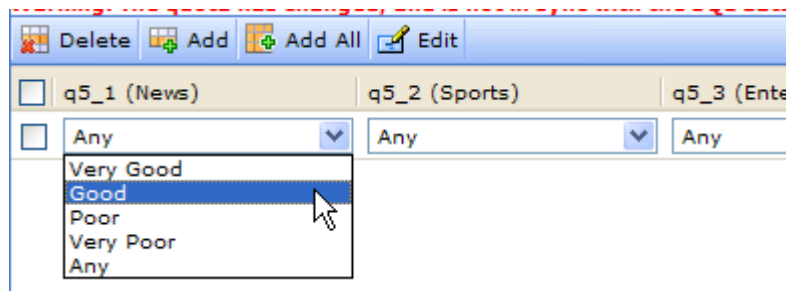


Figure 309 Quota details for a grid question

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 view. You can select in the Settings tab which of the fields are to be hidden from the List View (see the The List View Settings Tab section on page 259 for more information). Note that the hidden fields will still be part of the quota definition.

9.1.3.2. Multi Questions in List View

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.

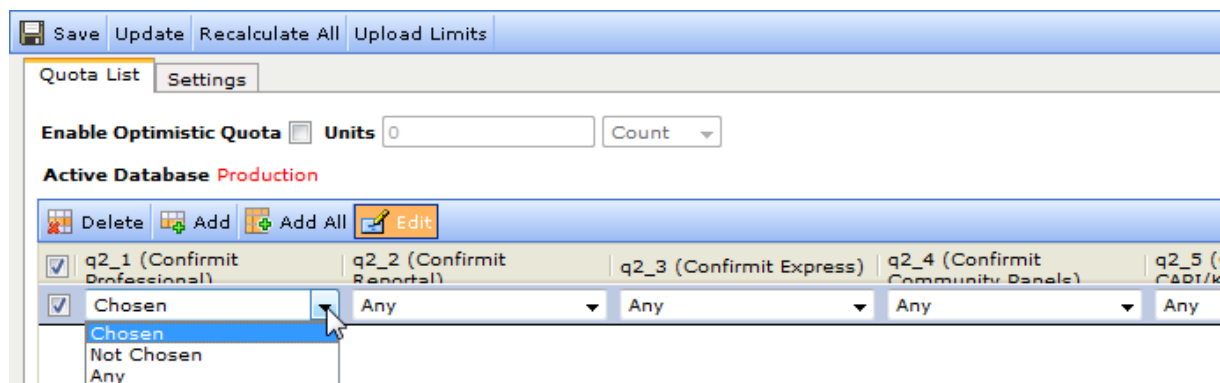


Figure 310 The Quota details for a multi question

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 Express 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. This is would be through scripts which check the quotas. 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 view. You can select in the Settings tab which of the fields are to be hidden from the List View (see the The List View Settings Tab section on page 259 for more information). Note that the hidden fields will still be part of the quota definition.

9.1.3.3. The List View Settings Tab

In the List View Settings tab, you can select fields to be hidden or excluded from the list view. 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.

The screenshot displays the 'List View Settings' window. At the top, there are buttons: 'Save', 'Update', 'Recalculate All', and 'Upload Limits'. Below these are two tabs: 'Quota List' and 'Settings', with 'Settings' being the active tab. The 'Settings' tab contains the following elements:

- Quota Name:** A text field containing 'quota3'.
- Quota Full Email:** A text field containing 'documentation@confirmit.com'.
- Hidden Columns:** A section with a description: 'These columns are included in the quota definition, but are currently not displayed in the Quota List.' Below this is a list box containing 'q2_6 (Confirmit CATI)' and a 'Change...' button.
- Excluded Columns:** A section with a description: 'These columns will not be included in the quota definition.' Below this is a list box containing 'q2_7 (Confirmit Translator)' and a 'Change...' button.

Figure 311 Hiding and excluding columns in list view

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.

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.

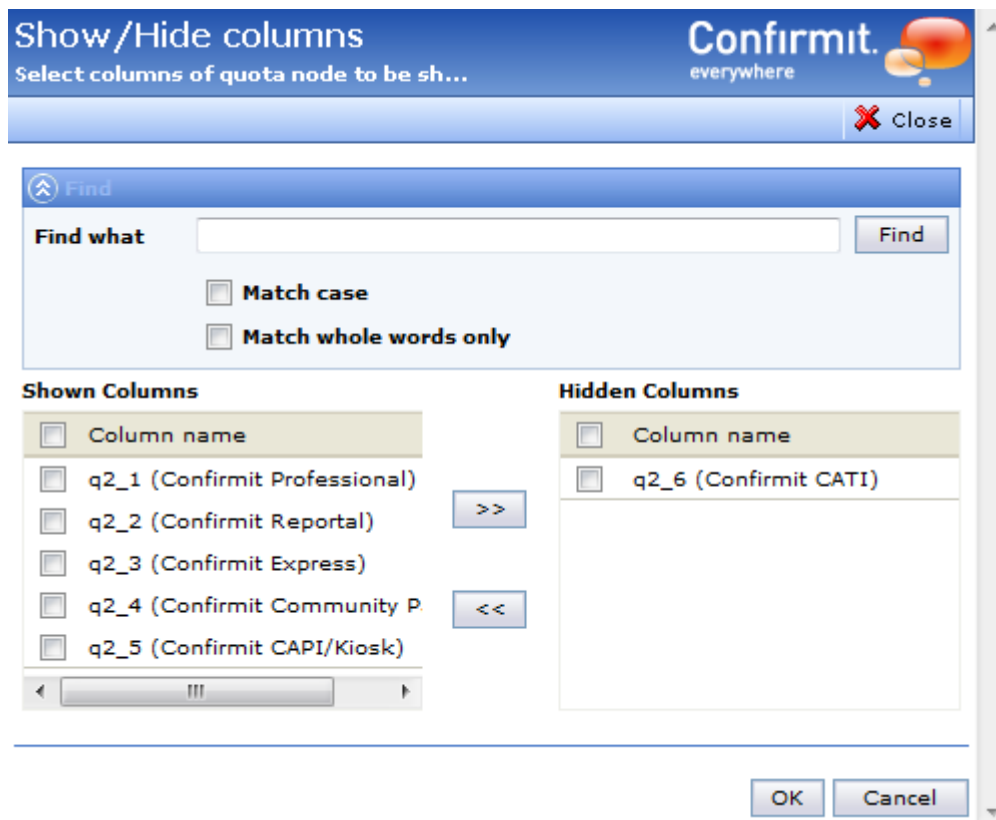


Figure 312 Example of the Show/Hide Columns window

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.

9.2. 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).

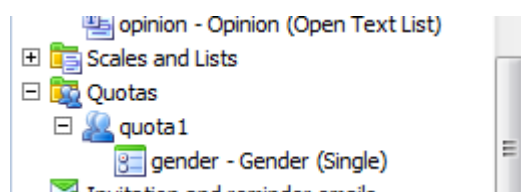


Figure 313 Adding quotas to a survey

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.

9.2.1. Defining the Quota Values in Grid View

To define quota limits in Grid view:

1. Type into the appropriate cells in the table, the required limits for those questions.
2. Click **Save** to 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, as in the "68 or more" row.

The screenshot shows the 'Quota Grid' interface with a toolbar at the top containing buttons: Save, Hide Counters, Show Remaining Count, Update, Recalculate All, and Upload Limits. Below the toolbar are tabs for 'Quota Grid' and 'Settings'. The 'Quota Grid' tab is active, showing options for 'Enable Optimistic Quota' (unchecked), 'Units' (0), and a 'Count' dropdown. The 'Active Database' is set to 'Production'. A table is displayed with columns for Gender (Male, Female) and Total. The rows represent age groups: Under 18, 18 to 30, 31 to 50, 51 to 67, 68 or more, and a Total row. The 'Total' column values are auto-populated and shown in blue italics.

Gender:	Male	Female	Total
Age			
Under 18	25	21	46
18 to 30	32	35	67
31 to 50	35	38	73
51 to 67	25	25	50
68 or more			14
Total	117	119	236

A yellow information box at the bottom states: "The counters are displayed in green."

Figure 314 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 been 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.

Save Hide Counters Show Remaining Count

Quota Grid
Settings

Enable Optimistic Quota ☐ **Units**

Active Database Production

Gender:	Male	Female	Total
Age			
Under 18	25 0	21 0	46
18 to 30	32 0	35 0	67
31 to 50	35 0	38 0	73
51 to 67	25 0	25 0	50
68 or more			0
Total	117	119	236

The counters are displayed in green.

Figure 315 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.

Save Hide Counters Show Remaining Count Update Recal

Quota Grid Settings

Enable Optimistic Quota ☐ Units 0 Cou

Active Database **Production**

Gender:	Male	Female	Total
Age			
Under 18	25 0	25 0	50
18 to 30	25 0	25 0	50
31 to 50	25 0	25 0	50
51 to 67	25 0	25 0	50
68 or more	25	25	50
Total	125	125	250

The counters are displayed in green.

Paste Distribute

Figure 316 Distributing Quotas

9.2.1.1. Removing the Totals from Grid View

It is possible to remove the totals from the quota table. To do this:

1. Right-click the question under the quota and select **Properties**.

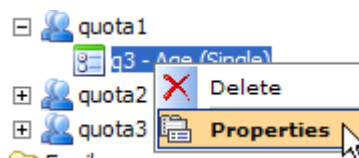


Figure 317 Opening Properties for the question inside the quota

The Properties page for the question opens towards the right side of the Confirmit window.

Properties

Quota Form Node - (q3)

General

Include Totals ☒

Exclude Precodes ...

Figure 318 The Properties page for the question inside the quota

2. In the property 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.

9.2.1.2. 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 The Grid View section on page 253 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 319 *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**.

9.2.2. Defining the Quota Values in List View

As explained in the List View section, the List View 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.

Save Update Recalculate All Upload Limits					
Quota List Settings					
Delete Add Add All Edit					
☐ 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	

Figure 320 Example of a List View 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.

☐ 68 or older	[Any]		0	5	
☐ Any	Any	0			

Figure 321 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.

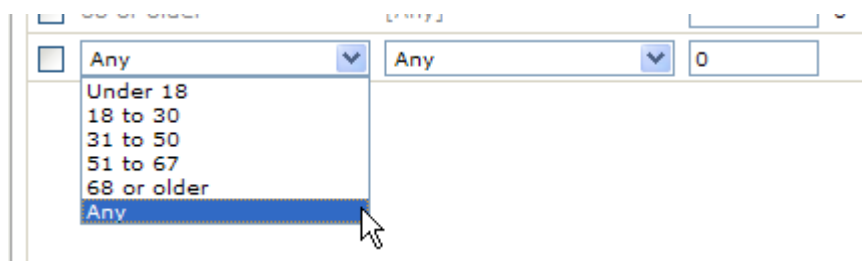


Figure 322 Selecting Any for the Age question

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.

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.

Quota List Settings

Warning: The quota has changed, and is not in sync with the SQL database. The changes will only be active after launching the survey.

Delete Add Add All Edit

Prod. Limit	Counter	Remaining
0		

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.

9.3. 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.

Save Hide Counters Show Remaining Count Update Recalculate All Upload Limits

Quota Grid Settings

Warning: The quota has changed, and is not in sync with the SQL database. The changes will only be active after launching the survey.

Enable Optimistic Quota ☐ Units 0 Count

Active Database Production

Gender:	Male	Female	Total
Age			
Under 18			0
18 to 30			0
31 to 50			0
51 to 67			0
68 or more			0
Total	0	0	0

Figure 325 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 the Optimistic Quotas section on page 269 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 project 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.

Save

Hide Counters

Show Remaining Count

Update

Recalculate All

Upload Limits

Quota Grid

Settings

!

Quota definition has been changed and is not in sync with the database. Cells with grey background have not been updated in the database. Please click update to apply the changes.

Enable Optimistic Quota

☐

Units

0

Count

▼

Active Database **Production**

Gender:	Male	Female	Total
Age			
Under 18	25 0	25 0	25 0
18 to 30	30 0	30 0	30 0
31 to 50	35 0	35 0	40 0
51 to 67	30 0	30 0	30 0
68 or more	30 0	30 0	60
Total	150	150	300

!

The counters are displayed in green.

Figure 326 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.

9.4. Optimistic Quotas

As stated in the introduction to this chapter (see the Quotas section on page 252 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.

9.4.1. 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 the Terminating the Interview for Respondents when Quota is Full section on page 274 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 (see the The General Options Tab section on page 353 for more information).

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 be 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.

9.4.2. 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.

The screenshot shows the 'Quota Grid' settings for a quota named 'Production'. The 'Enable Optimistic Quota' checkbox is checked. The 'Units' field is set to 5. A dropdown menu is open, showing 'Count' as the selected unit type. Below this is a table with age groups and their corresponding counts.

Age	Count	Optimistic Total
Under 18	20	0
18 to 30	30	0
31 to 50	30	0
51 to 67	30	0
68 or more	20	0
Total	130	

A message at the bottom states: 'The counters are displayed in green.'

Figure 327 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 be 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 view; not Grid view.

Age (Age)	Prod. Limit	Counter	Remaining	Live Achieved	Optimistic Total Limit
Under 18	25	0	25	0	30
18 to 30	20	0	20	0	25
31 to 50	30	0	30	0	35
51 to 67	35	0	35	0	40
68 or more	25	0	25	0	30

Figure 328 The Quota Details page in List view showing the Optimistic Total Limits

9.5. 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:

- 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.

- 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.)

- 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.

- 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:

- 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 project has been launched.

- Click **Browse**, then find and select the file you want to upload.

Figure 329 Selecting the file to upload

3. Select the Mode you wish to use.
 - o **Update**- (default) existing quota cells will be updated and new quota cells will be added.
 - o **Append** - existing quota cells will not be updated and new quota cells will be added.
3. 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.

9.6. Updating Counters

If you need to update changed quota limits, or have added new quota cells, it may be necessary to recalculate the quotas. To do this:

1. Click the **Update** button on the quota details screen.

Note: The Update button only becomes active once the project has been launched.

Update only counts limits that are newly created, so will be considerably faster than **Recalculate All**. 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.

9.7. Recalculating All

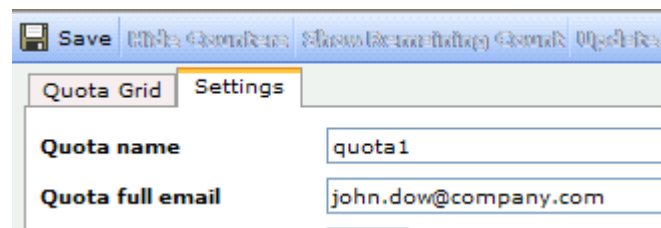
Click **Recalculate All** if you wish to update all quota limits and recalculate all counters. Note however that depending on the number of responses and the size of the quota, this action may take a considerable time to process. You are therefore recommended to use **Update** if you only need to update 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 project has been launched.

9.8. 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.



The screenshot shows a software interface with a 'Settings' tab selected. Under the 'Settings' tab, there are two input fields: 'Quota name' with the value 'quota1' and 'Quota full email' with the value 'john.dow@company.com'. Above the input fields are buttons for 'Save', 'Hide Quotas', 'Show Terminating Quota', and 'Update'.

Figure 330 Setting up the quota full email

The quota full email will be sent when the **qf** function (see the Terminating the Interview for Respondents when Quota is Full section on page 274 for more information) returns false 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.

9.9. 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".

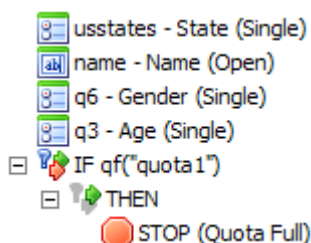


Figure 331 Quota Condition

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 and reaches the condition and gets by the check, since the count is 99. But before he 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.

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:

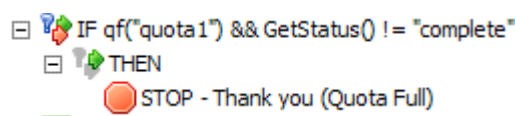


Figure 332 Quota Condition with check on Interview Status

9.10. Deleting Quotas

To delete a quota from the database, highlight the quota, press **Delete**, and then re-launch the survey.

10. Database Designer

Note: Database Designer is an add-on. It is not part of the standard Confirmit license and is subject to additional terms and conditions.

10.1. What is Database Designer?

Note: The use of DB Designer requires an understanding of how relational databases are built and function, and in particular, knowledge of relationships between tables and the use of primary keys. All support for this feature is regarded as "Additional Services".

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:
 - o It is then possible to refer to the same list (for example a list of brands) from different surveys.
 - o You can update the list dynamically without having to edit the questionnaires.
 - o 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 sublevels. 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: Whilst 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, Table lookups and Hierarchical lookups in created in Database Designer will be able to handle a larger number of rows.

If your company has access to the Database Designer add-on, it appears in the **Home** menu and in the Quick Access pane.

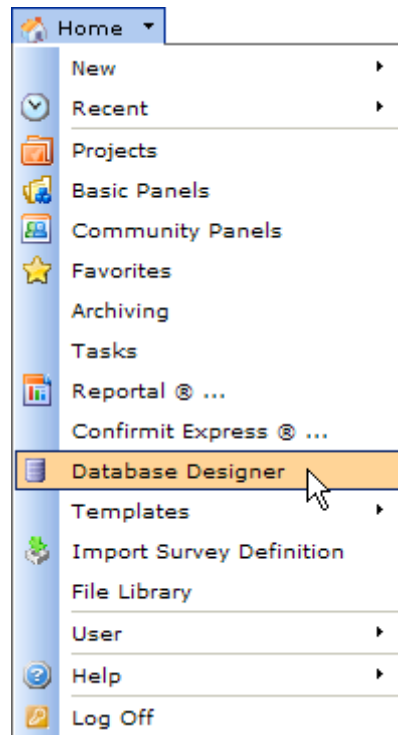


Figure 333 Entering Database Designer

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.

10.2. Creating a Schema

To create a new database:

1. Open Database Designer, then click **New Schema**.
The Schema Properties pane opens.
2. Give the schema a name and click **Save**.

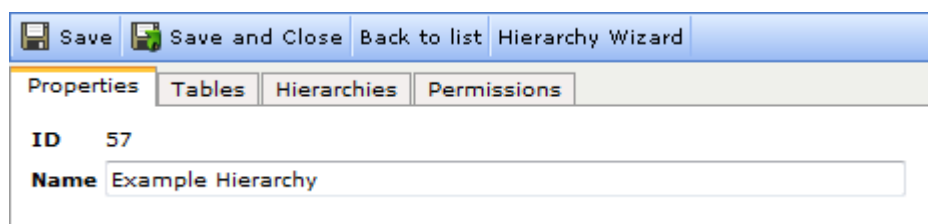


Figure 334 Creating a new schema

A new, empty database is set up and assigned an ID, and the remaining tabs and buttons on the page become available. Note that you can change the schema name at any time, but the ID cannot be changed.

10.2.1. How to Insert a New Table

To set up a table within the database:

1. Go to the Tables tab and click **Add Table**.

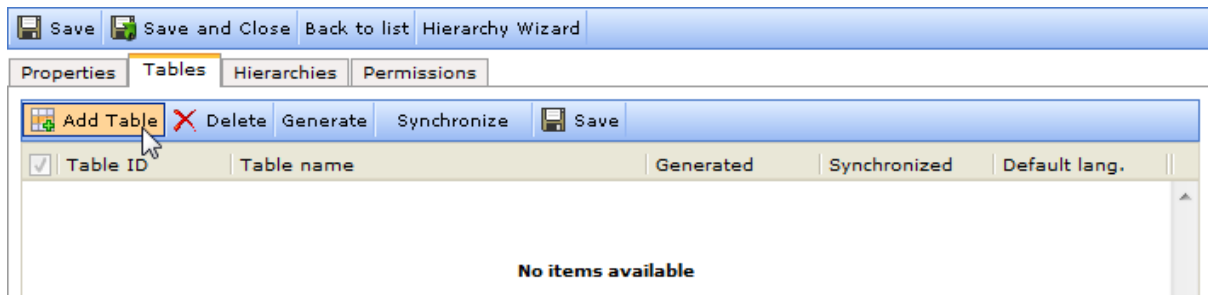


Figure 335 Adding a table to the database

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**.

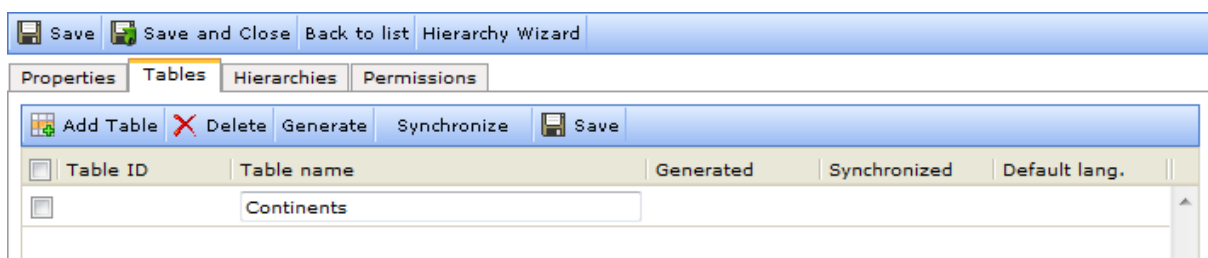


Figure 336 Entering the table name

3. Click **Save**.

The table is assigned a Table ID and the rest of the fields are filled with default values.

4. To modify the table, click on the table ID (see the Table Properties section on page 278 for more information).

10.2.2. 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) to open the Properties form for that table. The Properties form opens below the table list, at the Properties tab.

In the table Properties tab you can change table name, select all the languages in which you want to insert texts in your table, and select a default language. You can select as many languages as required, and add new languages later. In this example two languages are selected, English and Norwegian, and English is set as the default language.

Save Save and Close Back to list Hierarchy Wizard

Properties Tables Hierarchies Permissions

Add Table Delete Generate Synchronize Save

Table ID	Table name	Generated	Synchronized	Default lang.
25	Continents	False	False	English

0 of 1 selected.

Save

Properties Captions Relations Additional Columns Contents

Name: Continents

PK width: 32

Generated: False

Synchronized: False

Languages:

All languages: Nepali (India), Norwegian (Bokmål), Norwegian (Nynorsk), Oriya

Selected languages: English, Norwegian

Default language: English

Figure 337 The table Properties tab

You can also specify 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 setting on the primary key width.

10.2.3. Captions

Go to the **Captions** tab to specify the table names in the various languages that have been selected to be used. A separate row is displayed for each language. In each row, the Caption field will by default display the Table name. 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.

Save

Properties Captions Relations Additional Columns Contents

Save

ID	Caption	Language
79	Continents	English
80	Kontinenter	Norwegian

Figure 338 The Captions tab

10.2.4. 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 check box to the left of the appropriate Table ID number.
2. Select **Generate**.

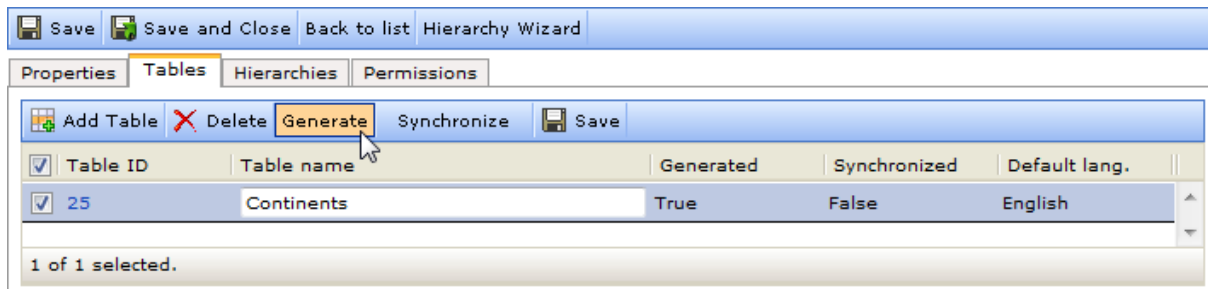


Figure 339 Generating the table

Note: You can select all tables in the database by clicking in the checkbox beside the Table ID header.

The “Generated” flag will now change from **False** to **True**.

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.

10.2.5. 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 (see the How to Add Data to the Table section on page 280 for more information), copy data from files and paste it into the table (see the How to Copy and Paste Data into a Table section on page 281 for more information), or you can upload the data as a file (see the How to Upload the Table Contents section on page 282 for more information).

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.

10.2.5.1. 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.

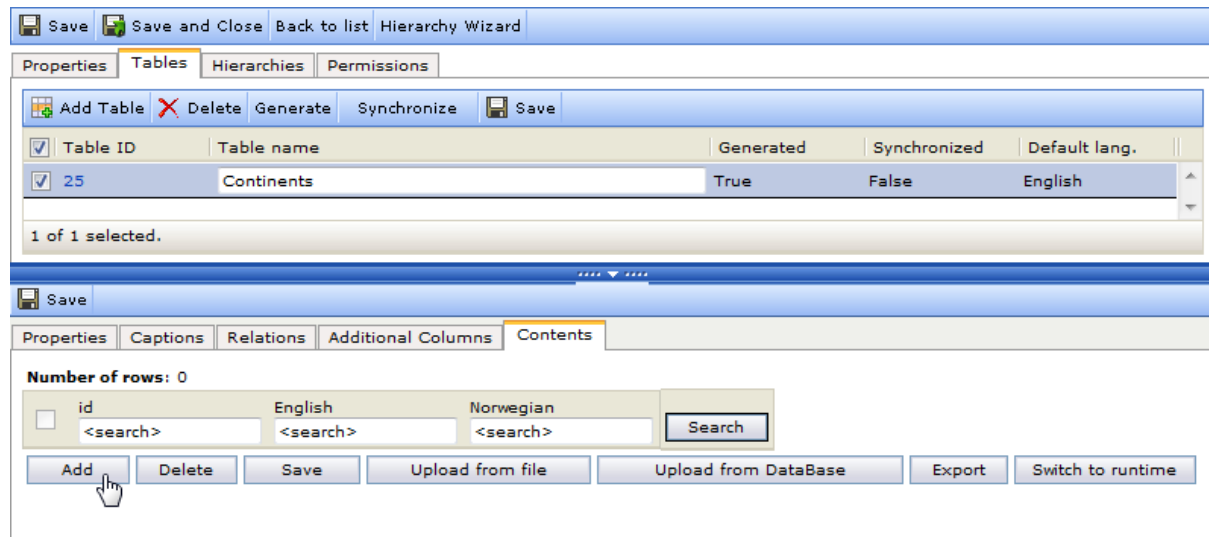


Figure 340 Adding content to the table

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.

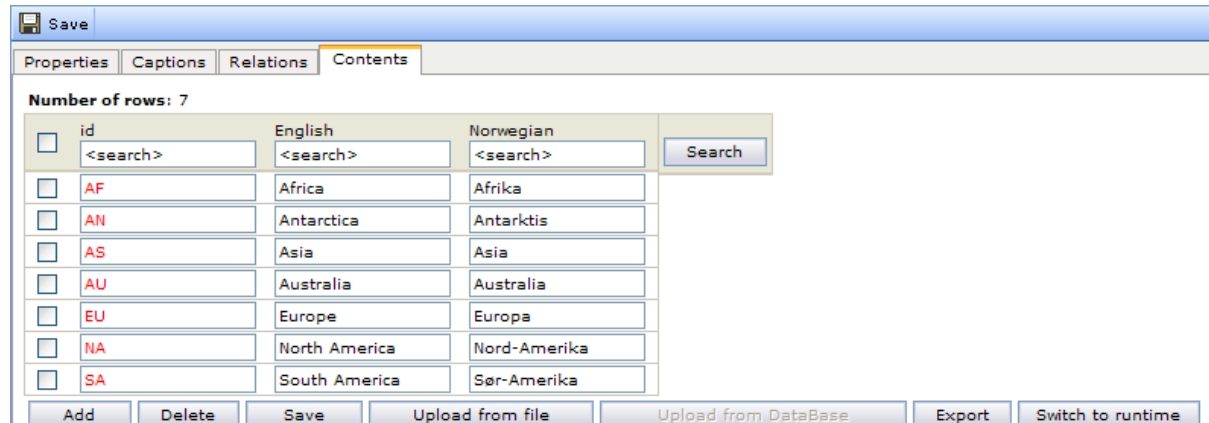


Figure 341 The completed and saved table

10.2.5.2. 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 for example 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.

10.2.5.3. 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. You can also schedule the task for a later time, and make the task recurring. To do this:

Important:
The file to be uploaded must be in tab-delimited ASCII text format (created for example via "Save as" or "Export" in applications such as MS Excel®). This ASCII 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.

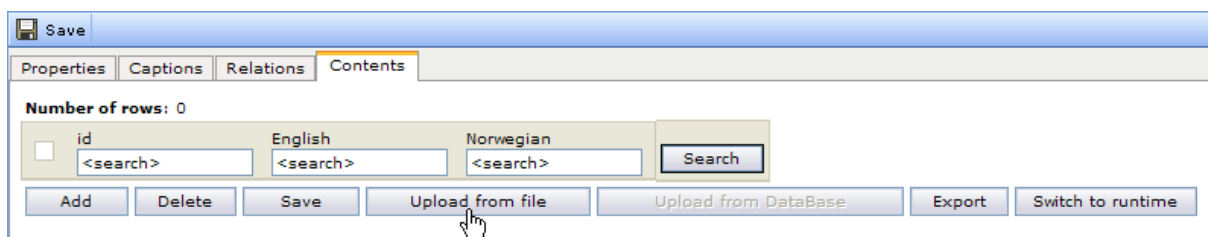


Figure 342 Uploading a list

The Selection dialog opens.

Figure 343 The file selection dialog

3. Select the type of upload you wish to perform.
 - o **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.
 - o **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. Note that fetching from FTP can allow automation of data flows, since files can then be picked up automatically.
 - o **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.
 - o **Append/Update** - merges the already-existing content 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.
 - o **Overwrite** - removes 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 (see the Synchronizing Between Design and Runtime Modes section on page 286 for more information).
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.

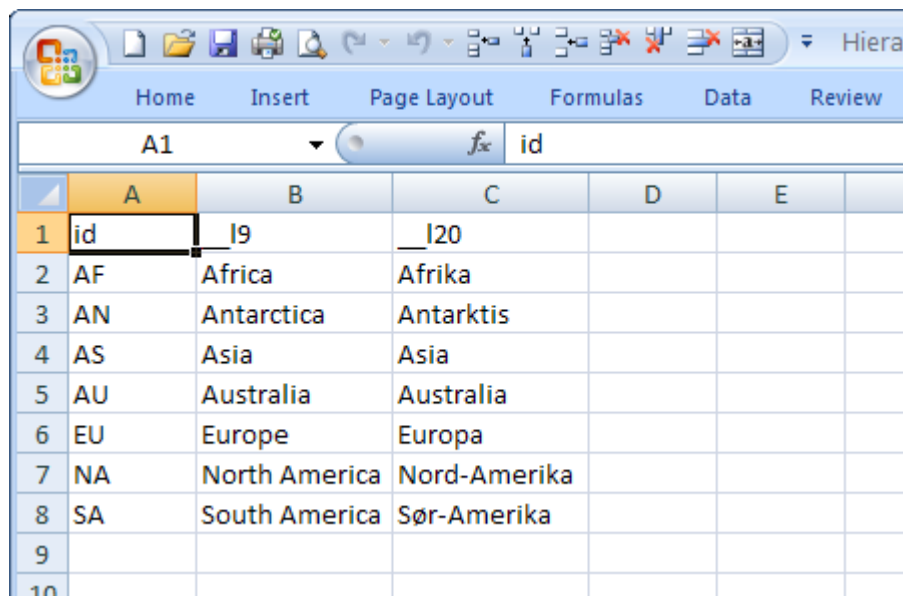
The first row in the ASCII upload file must have the following column headings:

Heading	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 number of languages) with the answer texts (see the APPENDIX B: CONFIRMIT LANGUAGE CODES section on page 609 for more information).
<relationship field(s)> (for example r1).	For each relation the table is used in, you have to include the name of the relation (as set up in relations), for example r1 in the “continent-countries” example.

Note: The language codes must be preceded by two underscore characters.

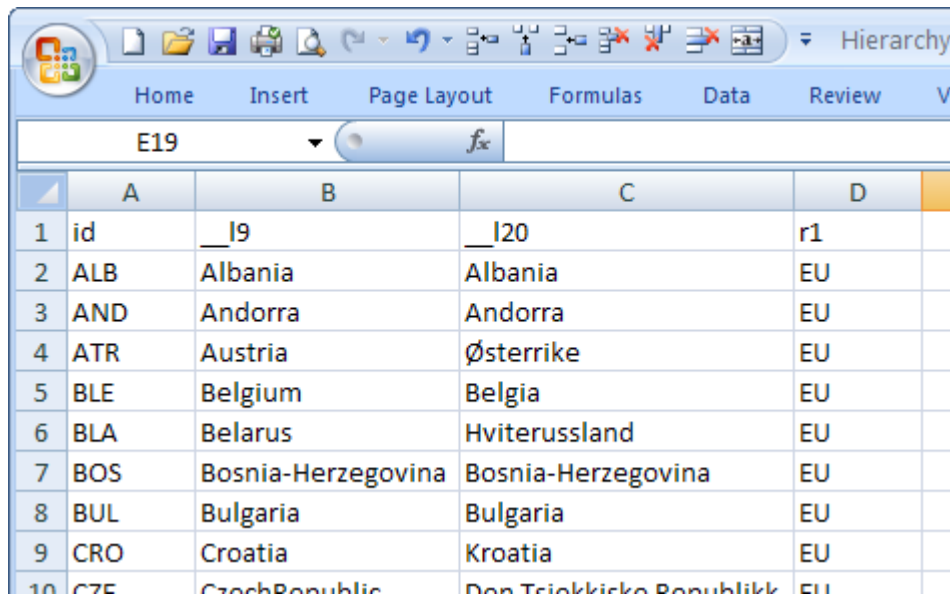
The contents of the “Continents” table could have been uploaded from a file such as:



	A	B	C	D	E	F
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 344 Example of a Continents file

The contents of a “Countries” table could be uploaded from a file such as (extract):



	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
10	CZE	Czech Republic	Česká republika	EU

Figure 345 Example of a Countries file

10.2.5.4. How to Add a Column

There may come a time when you need to add further columns to a table. To do this:

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**.

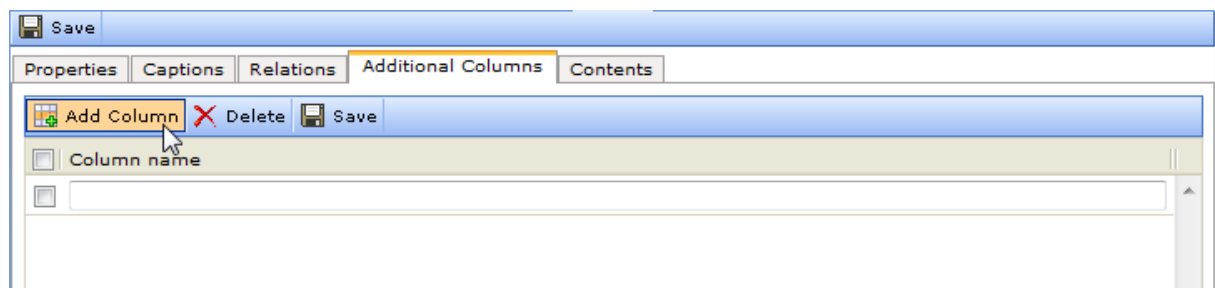


Figure 346 Adding a column to the table

A Column Name field appears.

4. Type the name for your new column into the field.
5. Click **Save** to save the changes.

The new column is added to the table. Go to the Contents tab to see the fields; there will be one field for each language selected for the table.

10.2.6. 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.

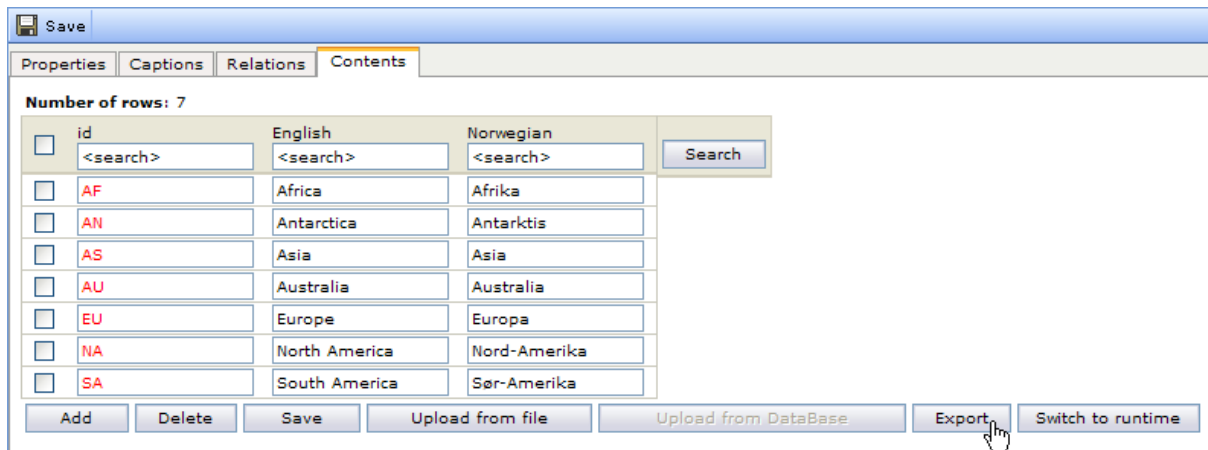


Figure 347 Exporting the table contents

The Selection dialog opens. This dialog 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.

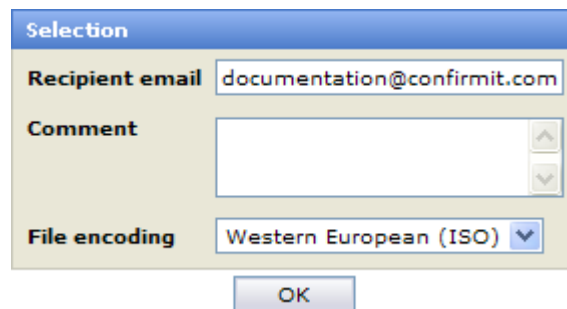


Figure 348 The table export Selection dialog

2. Make any required changes, then click **OK**.

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 (see the How to Upload the Table Contents section on page 282 for more information).

10.3. 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**.

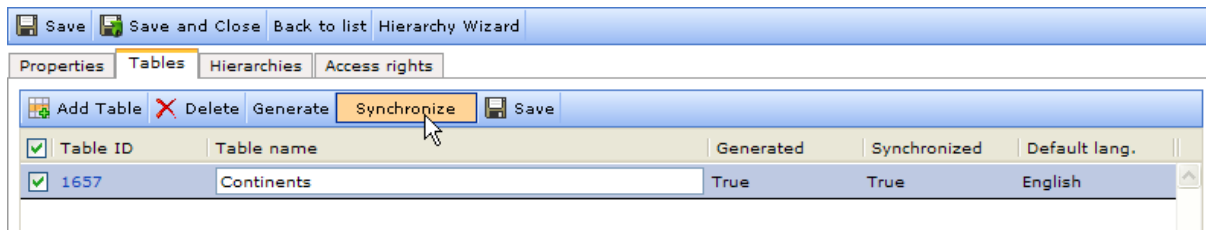


Figure 349 Synchronizing the table

The Table Synchronization task page opens and the synchronization task is run.

- On completion, click **OK** to return to the Tables tab.

The “Synchronize” status 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 350 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.

10.4. Hierarchies

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.

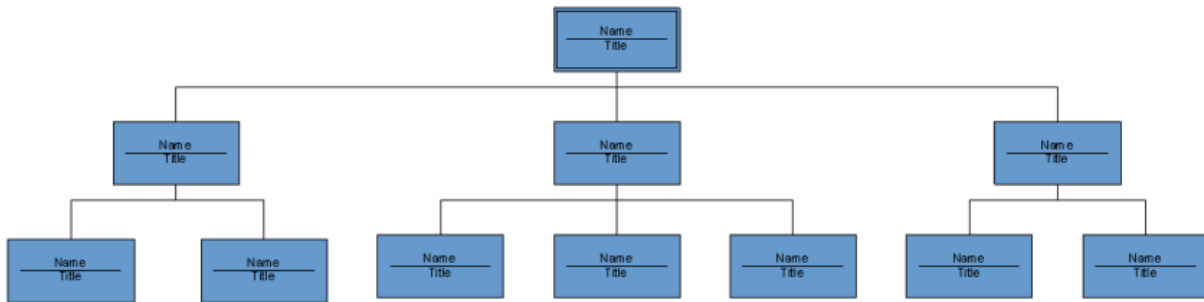


Figure 351 Example of a Balanced hierarchy

An example of this is the relationship between continents and countries. Every country is in one or another continent, so by selecting a country a respondent automatically selects the continent (see the Balanced Hierarchy section on page 288 for more information).

In an **unbalanced** (parent-child / self-referencing) hierarchy the different branches do not need to have the same number of sublevels, 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 (see the Unbalanced Hierarchy section on page 292 for more information).

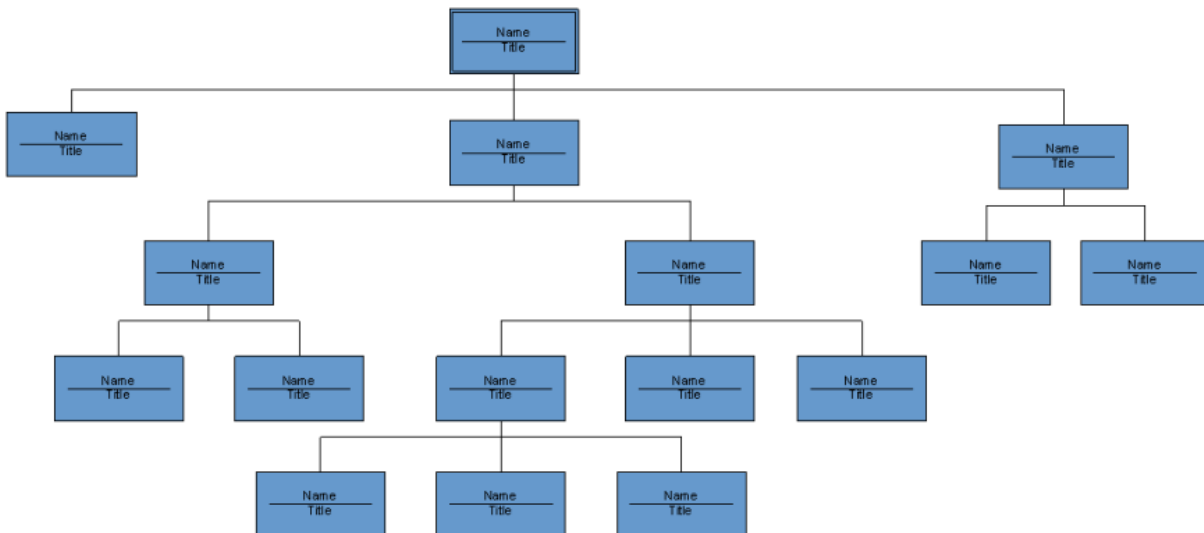


Figure 352 Example of an Unbalanced hierarchy

10.4.1. 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 (see the Creating a Schema section on page 277 for more information), then you must create a separate table for each level in the hierarchy. 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.

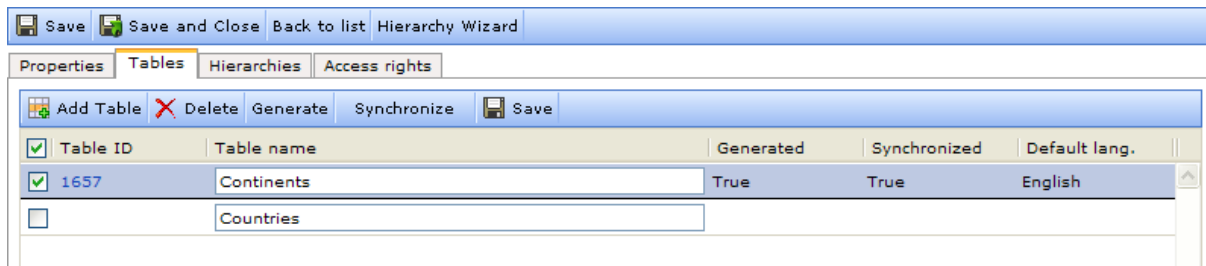


Figure 353 Adding a table

4. Click **Save** to save the changes.
5. Click the table ID to edit the properties of the new table.

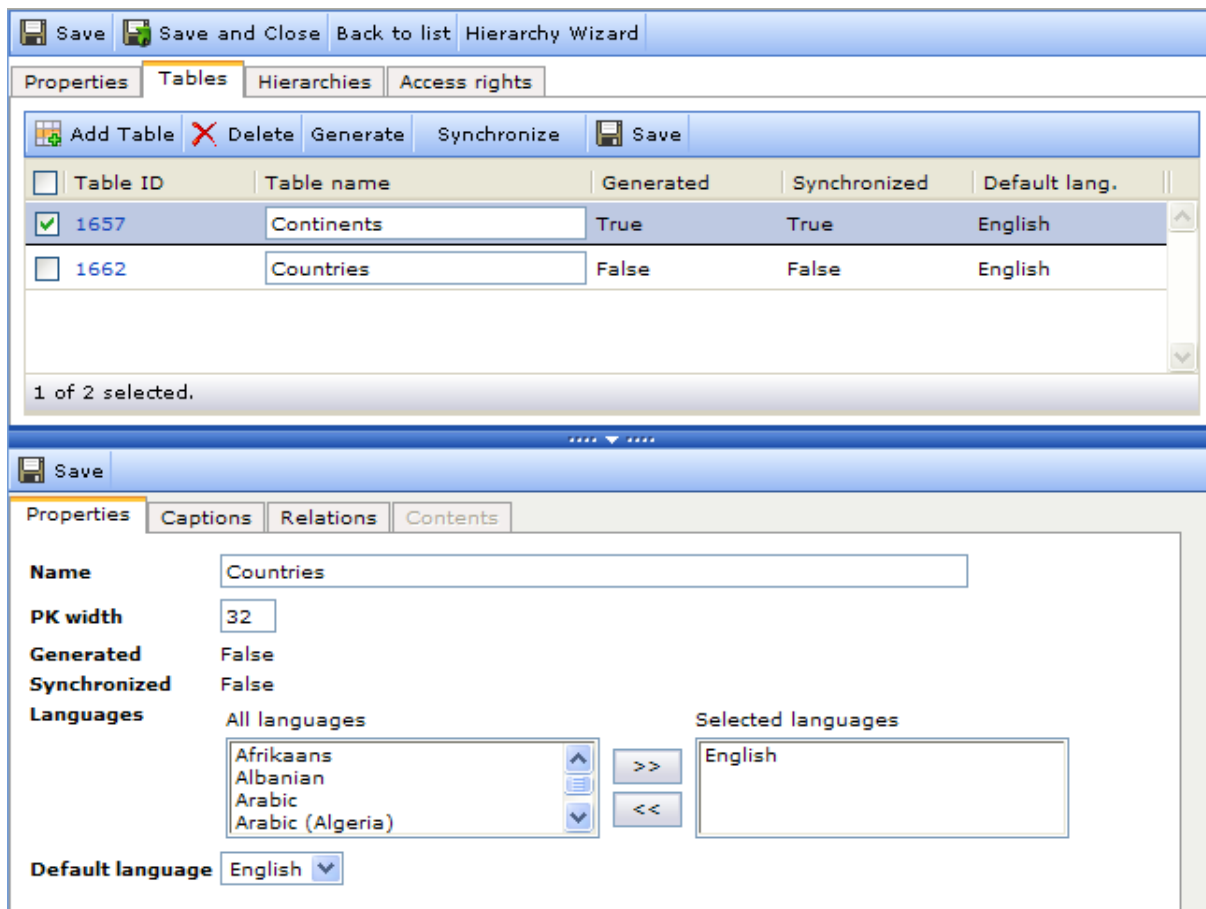


Figure 354 The table properties

6. Select the required languages (in this case **English** and **Norwegian**).
7. Go to the Captions tab and enter caption texts for the "non-default" languages.

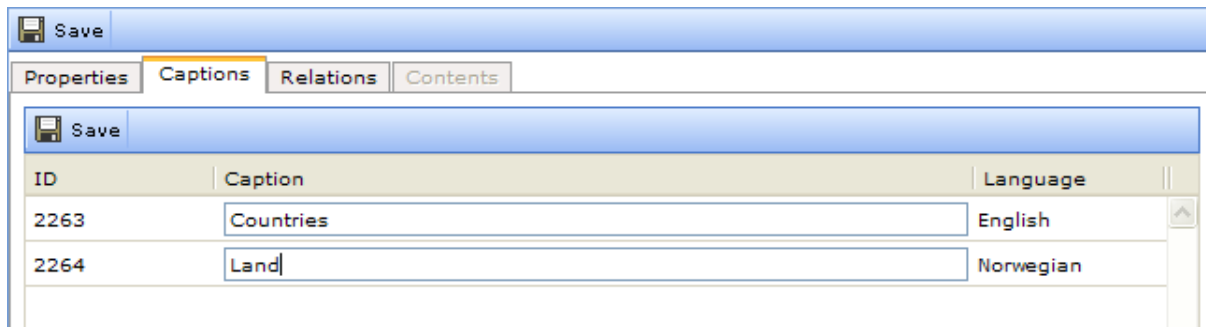


Figure 355 The Captions tab

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 356 Setting up Relations

The "Required" setting defines whether or not a "parent" must be defined for each "child". In this case every country should belong to a continent, so the "Required" property is 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.

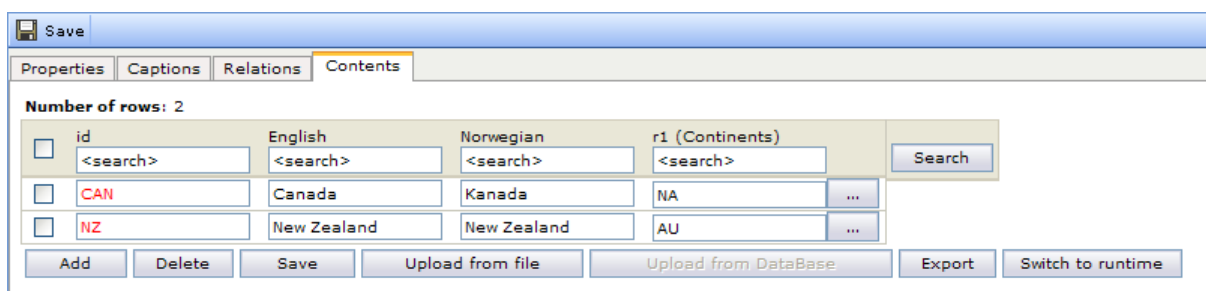


Figure 357 Table contents

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.

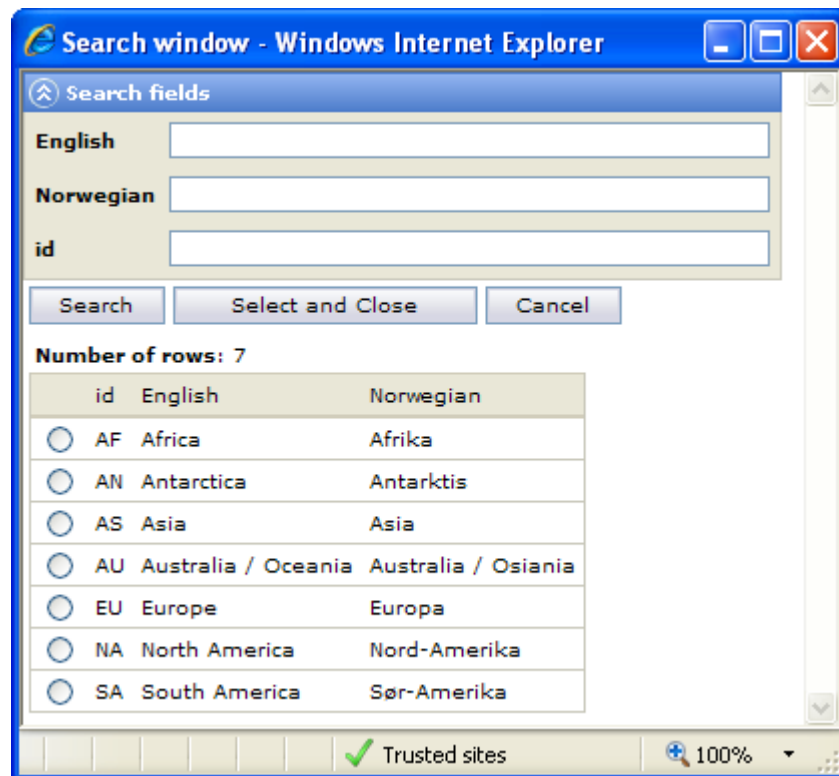


Figure 358 The Search window

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 (see the Synchronizing Between Design and Runtime Modes section on page 286 for more information).

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 now 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**.

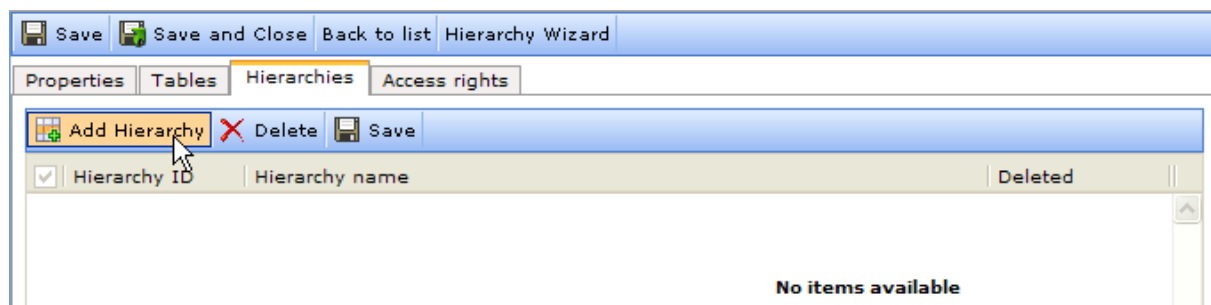


Figure 359 Adding a hierarchy

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 hierarchy id.

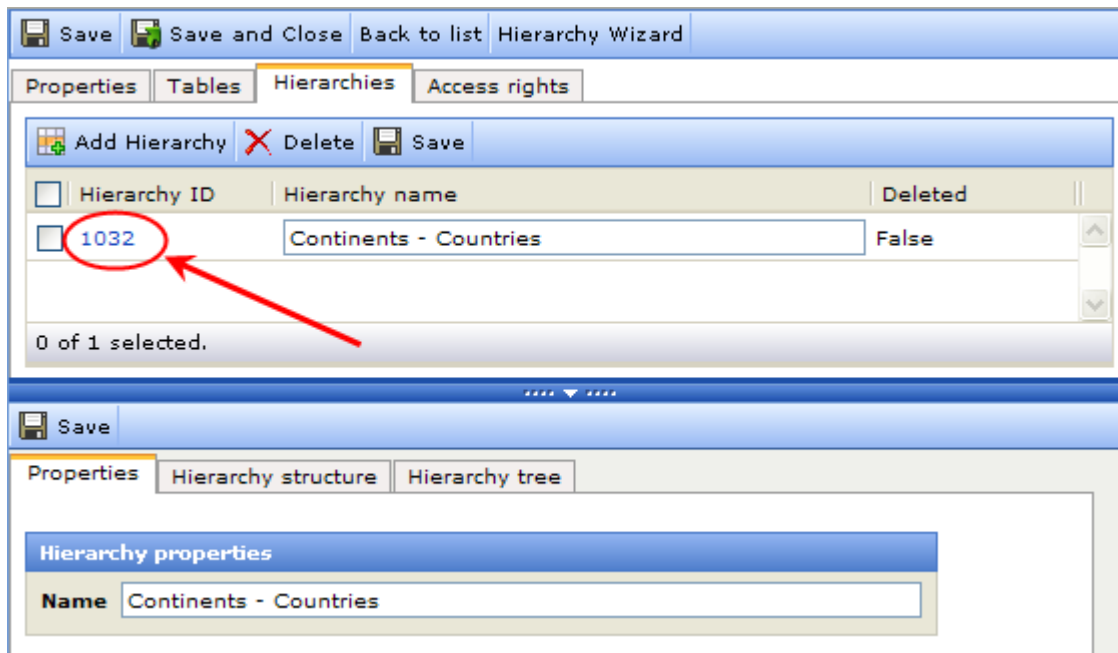


Figure 360 Adding a hierarchy to the database

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 361 The Hierarchy structure

10.4.2. 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:

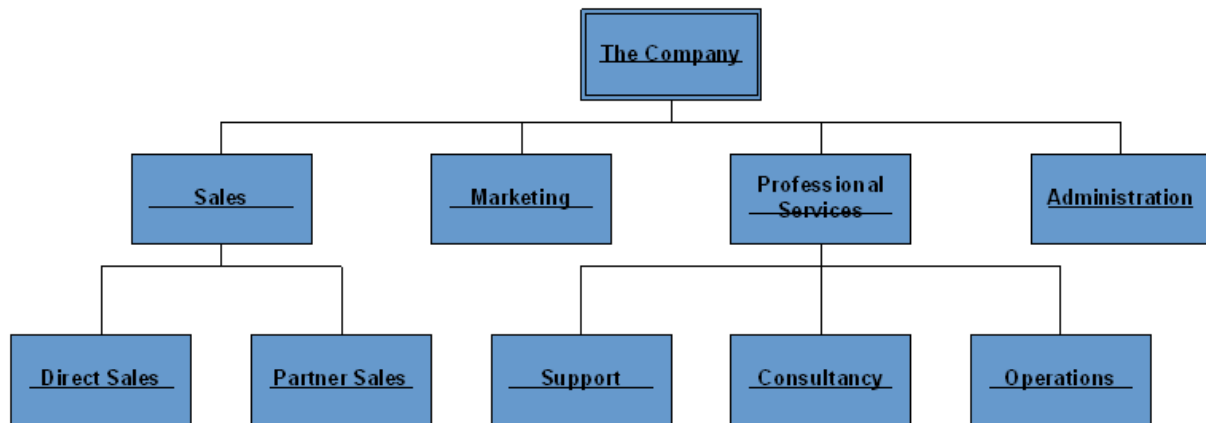


Figure 362 Example of organization hierarchy in "The Company"

This hierarchy will be set up in the table "CompanyTable".

1. In the Database Designer, create and save a new schema (see the Creating a Schema section on page 277 for more information).
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.

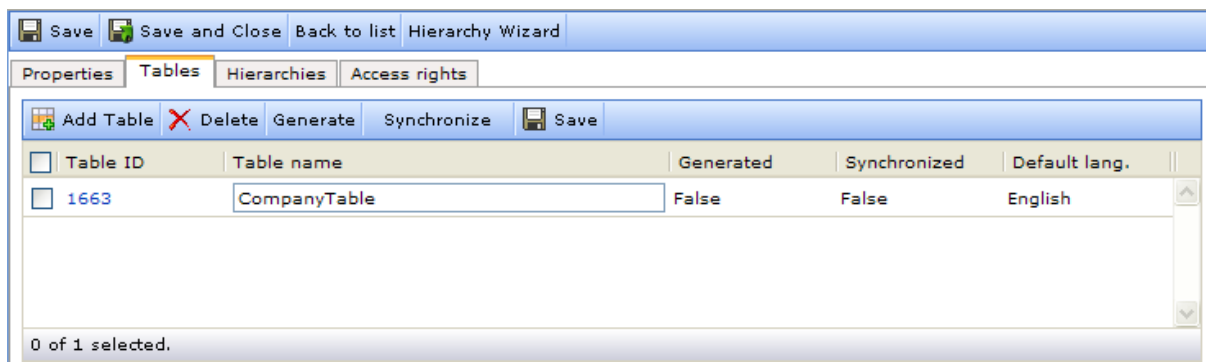


Figure 363 The table list

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 364 Setting up a self-referencing relation

Note: This relation must be set up as not required (do not check off the “Required” check box), 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.

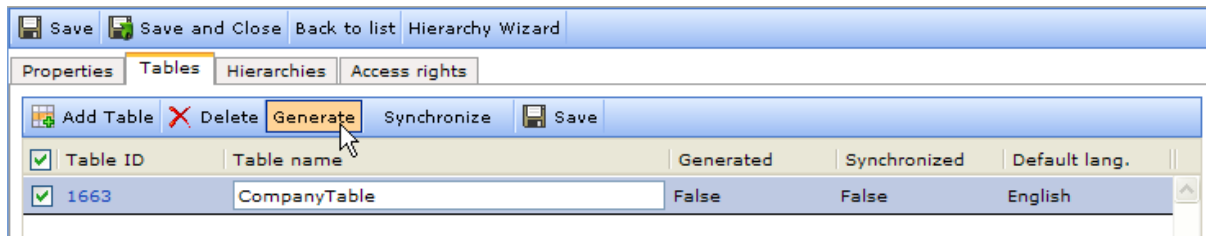


Figure 365 Generating the table

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:

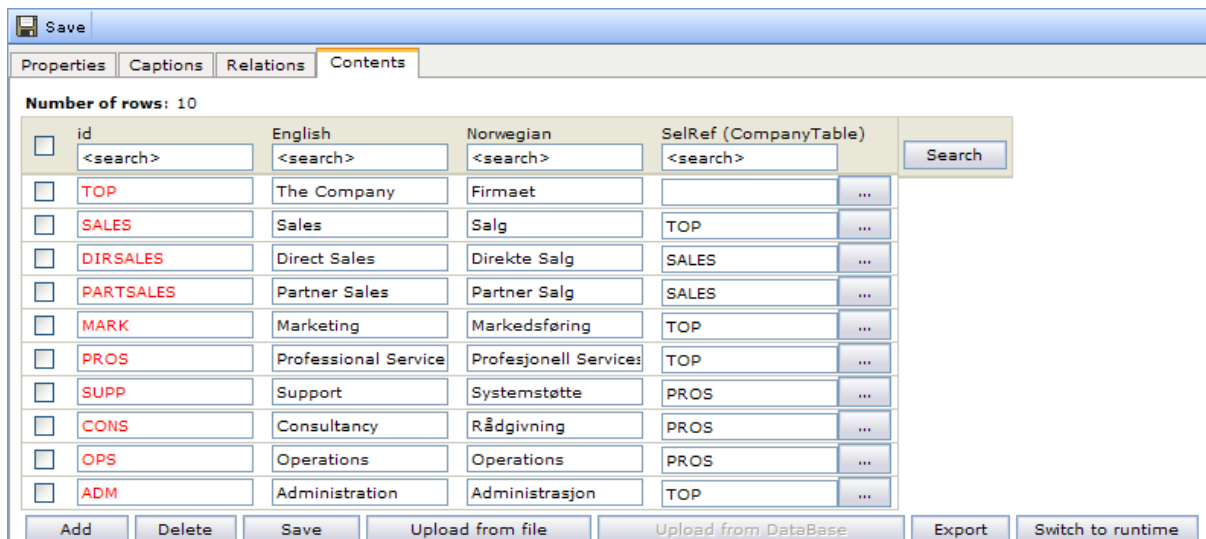


Figure 366 A self-referencing table

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 (see the How to Edit the Table Contents section on page 280 for more information).

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**:

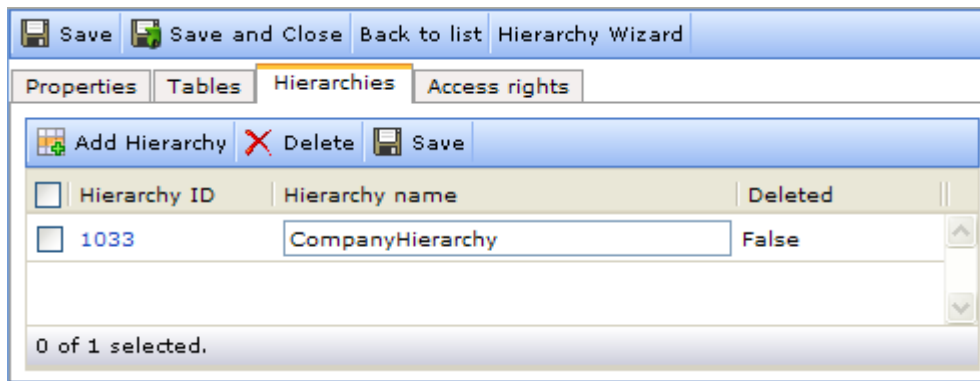


Figure 367 Adding hierarchy

- Click the hierarchy ID and go to the "Hierarchy structure" tab to select the self-referencing relation in the "companytable". Then click **Save**:

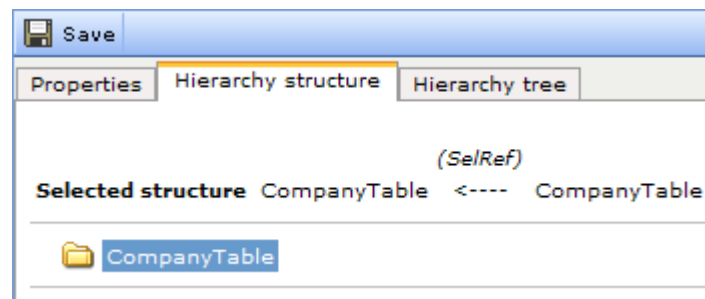


Figure 368 Selecting relations in the hierarchy

The Hierarchy Tree tab displays the hierarchy as a tree structure, as shown in the example below.

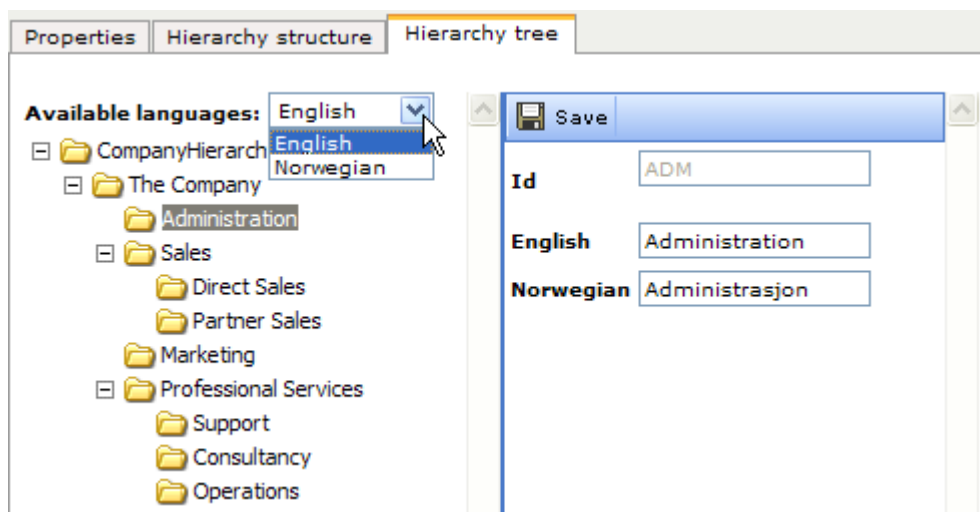


Figure 369 Example of the Hierarchy Tree tab

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.

10.4.3. The Hierarchy Wizard

The Hierarchy Wizard provides a simpler 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 370 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 371 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 (see the Balanced Hierarchy section on page 288 for more information).

If you have selected to upload data, then the file selection dialog is displayed.

Figure 372 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 (see the How to Upload the Table Contents section on page 282 for more information).

10.5. 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 (see the The Permissions Tab section on page 552 for more information).

Figure 373 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.

10.6. 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**.

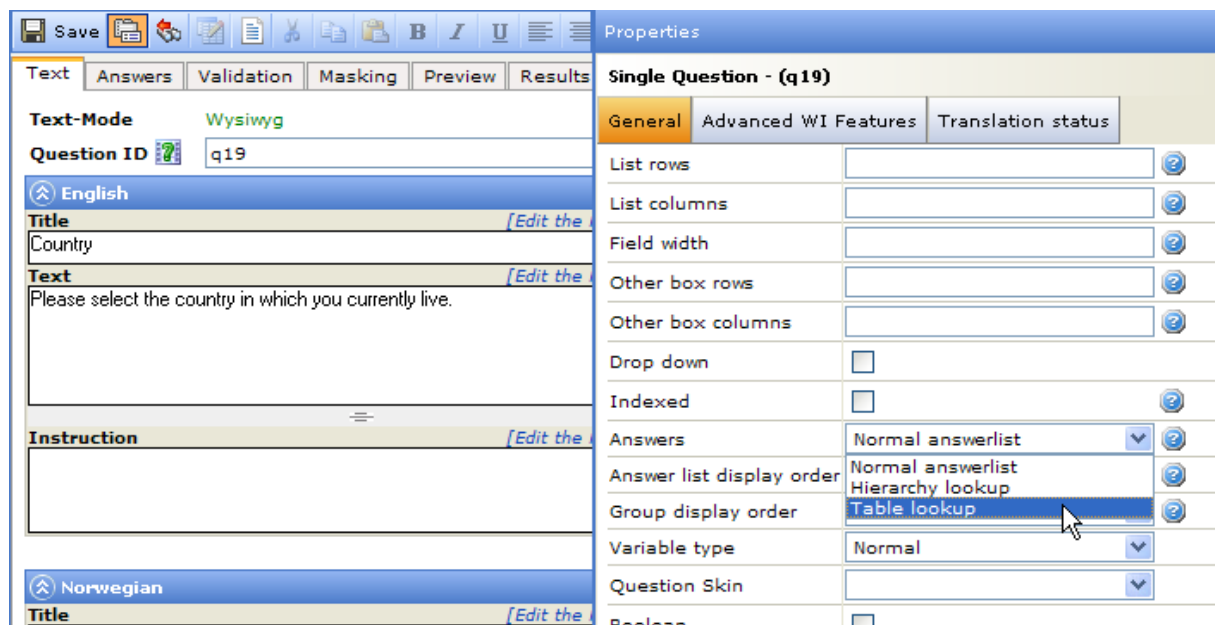


Figure 374 Selecting the desired Answers property

If you select **Normal answer list**, the answer list is inserted as usual in the "Answers" tab. 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.

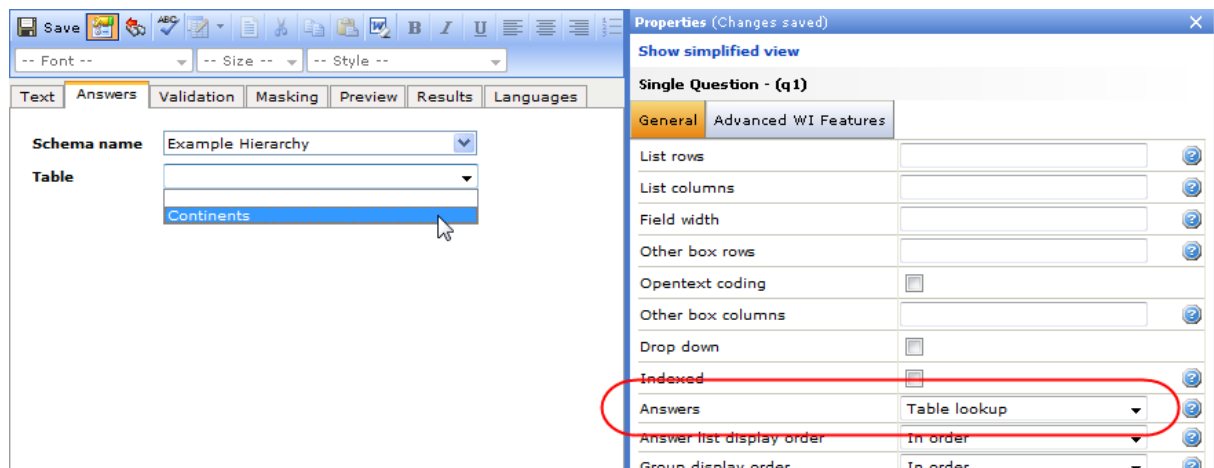


Figure 375 Selecting the table for "Table lookup"

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.

If you select **Hierarchy lookup**, the "Answers" tab will include an interface for selecting a database schema and a hierarchy from that schema (see the Hierarchies section on page 287 for more information).

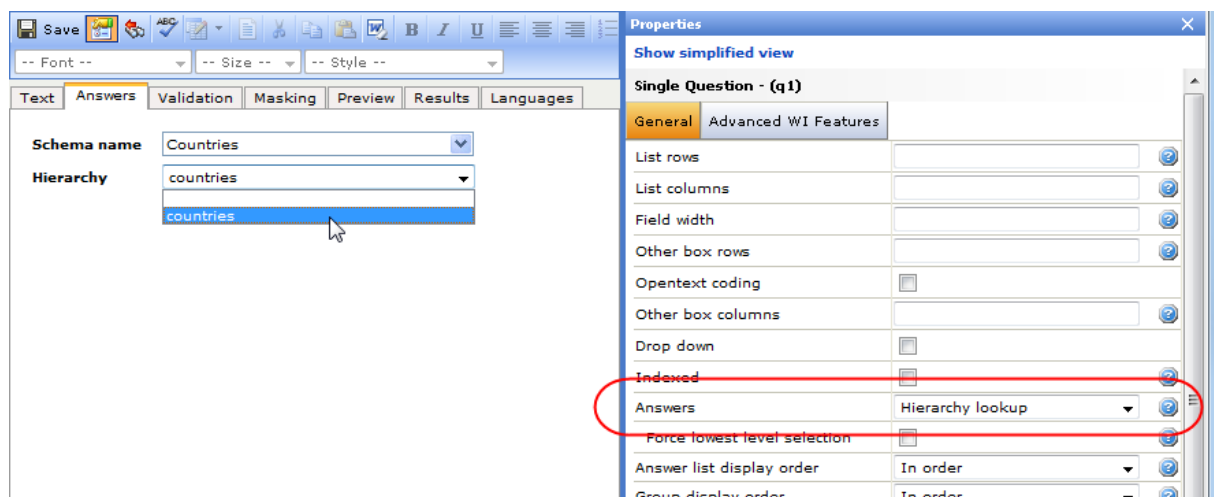


Figure 376 Selecting the Hierarchy for a "Hierarchy lookup" question type

The "Hierarchy Lookup" question type provides a special interface for the respondent. The answers are presented as a hierarchical list. As the respondent makes a selection on each level, the "sub-options" available for that selection are displayed, enabling the respondent to choose further. The respondent thereby 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.

The screenshot shows a question titled "Country" with the instruction "Please select the country in which you currently live." Below the instruction is a search bar. Underneath the search bar, the breadcrumb path "--> Root" is displayed. A list of continents is shown, each preceded by a folder icon: Africa, Asia, Australia / Oceania, Europe (which is highlighted in blue), North America, and South America. A vertical scrollbar is visible on the right side of the list.

Figure 377 Example of the Respondent interface for a hierarchical question

This screenshot shows the same "Country" question, but the breadcrumb path has updated to "--> Root --> Europe". The list now displays countries within Europe, each preceded by a radio button: Macedonia, Malta, Moldova, Monaco, Montenegro, Netherlands, Norway (which is selected, indicated by a green dot and a blue highlight), Poland, and Portugal. A vertical scrollbar is also present on the right.

Figure 378 An item is selected on a hierarchical question

When you select Hierarchy Lookup, a further option appears in the Properties list - **Force lowest level selection**(see the The General Tab section on page 184 for more information). This allows you to force 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.

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:

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 (see the **Balanced Hierarchy** section on page 288 for more information)), 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 or debug station. Surveys that include hierarchy questions can be run on a CAPI/Kiosk console, but without the dynamic functionality.

11. Translator

Note: Translator is a chargeable Add-On.

The Translator module allows people without Confirmit access to be engaged in translating Confirmit projects. The translators will access projects from a different interface via a URL sent to them by the project manager. The changes made by the translators will be visible in the Confirmit Authoring interface.

11.1. Entering Confirmit Translator

To enter Confirmit Translator:

1. Open the project, then go to the **Translation > Settings** menu command.

The Translation Overview page opens.

Note: To be able to assign translators to a project, the project must have at least two project languages, one of which will be the default project language. If you attempt to enter the Translator functionality from a project with only one language, the following error message will be displayed:

Note: There needs to be more than one language specified for this operation.

Figure 379 The warning that appears when the project is not multilingual

11.2. Assigning Translators to Projects

When no translators have been assigned to a project, the Translation Overview will look as shown below. The language status for all the questions for each language will be *Untouched*.

General		Assign																	
Default language	English																		
Email recipient of status notification	documentation@confirmit.com																		
Status	<table border="1"> <thead> <tr> <th>Language</th> <th>Untouched</th> <th>Touched</th> <th>Complete</th> <th>Finished</th> </tr> </thead> <tbody> <tr> <td>Norwegian</td> <td>14</td> <td>0</td> <td>0</td> <td>☐</td> </tr> <tr> <td>Spanish</td> <td>14</td> <td>0</td> <td>0</td> <td>☐</td> </tr> </tbody> </table>				Language	Untouched	Touched	Complete	Finished	Norwegian	14	0	0	☐	Spanish	14	0	0	☐
Language	Untouched	Touched	Complete	Finished															
Norwegian	14	0	0	☐															
Spanish	14	0	0	☐															
Assigned translators	<table border="1"> <thead> <tr> <th>Last name</th> <th>First name</th> <th>User name</th> <th>Company</th> <th>Email</th> </tr> </thead> <tbody> </tbody> </table>				Last name	First name	User name	Company	Email										
Last name	First name	User name	Company	Email															

Figure 380 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 381 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.

Language	Untouched	Touched	Complete	Finished
Norwegian	14	0	0	☐
Spanish	14	0	0	☐

Last name	First name	User name	Company	Email
Doe	John	johndoe	User Guide Company	johndoe@userguide.com

Figure 382 Example of the Translator Settings page with assigned translators

11.2.1. 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 project that is to be translated - the procedure is the same as when you give other users permission to view and/or edit the project (see the Permissions section on page 139 for more information).

To give permissions to a project 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.

Created	23. januar 2003 12:09:51
Modified	23. januar 2003 12:15:24
Converted	
Created by	administrator
Key	JICBJQFSPAWE PDNGKVNUIJFWX
Password	[Reset password] !
Expires (y/m/d)	

Figure 383 Copying a user key

- Go to the Project Overview page for the project, and click the Permissions tab.
- Scroll to the bottom of the page and click the **Add other users** link.
A text input field appears.
- Paste the User key into the field.

Enter keys of new users

PUFYTSJPPOEUZVCVOIAXBMDF

Add

Figure 384 Pasting a User Key into the text field

Note: Ensure that you do not have any white-space before or after the User Key.

- Click the **Add** button.
The user is added to the Object permissions list under Other users/Groups.

Groups							
Other users							
usermanual	Jones	Sarah	☒	☐	☐	☐	☐
translator3	Translator 3	Translator 3	☒	☐	☐	☐	☐

Figure 385 A user added under other users/groups

Now you can give the user Project translator access. The user will be displayed in Translation overview under Assign Translators.

Other users/groups

Sarah Jones (usermanual)

Translator 3 Translator 3 (translator3)

Save

Figure 386 A new user displayed in Translation overview

When chosen, the translator will be shown on the first Translation overview page under Assigned Translators.

General **Assign**

Default language English

Email recipient of status notification [redacted]

Status

Language	Untouched	Touched	Complete	Finished
Norwegian	3	0	0	☐

Assigned translators

Last name	First name	User name	Company	Email
Andreas	Andreas	andreasj@confirmit.com	Confirmit ASA	andreasj@confirmit.com
Translator 3	Translator 3	translator3@confirmit.com	Confirmit ASA	translator3@confirmit.com

Figure 387 A new translator displayed in Assigned Translators

11.2.2. 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 project access to them on an individual level. Contact your Confirmit Administrator to create users and groups.

Note: The project manager/administrator himself must be a member of the group to see the group in the project Object permissions.

Groups									
Translator Group			☒	☐	☐	☐	☐	☐	☐
Other users									
usermanual	Jones	Sarah	☒	☐	☐	☐	☐	☐	☐
translator3	Translator 3	Translator 3	☒	☐	☐	☐	☐	☐	☐

Figure 388 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 project, all translators in the group will be displayed under Assigned Translators.

Properties

Default language

English

Email recipient of status notification

johndoe@userguidecomp.com

Status

Language	Untouched	Touched	Complete	Finished
Norwegian	5	0	0	☐

Assigned translators

Last name	First name	User name	Company
Doe	John	johndoe *	User Guide Company
Translator	Translator	translator	User Guide Company
Translator 1	Translator 1	translator1	User Guide Company
Translator 3	Translator 3	translator3	Translators Ltd.

Save

[\[Assign translators \]](#)
[\[Email translators \]](#)

Figure 389 All translators in the group are displayed under Assigned translators

11.3. Emailing Projects 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.

☒	Last name	First name	User name	Company	Email
☒	Translator	Translator	translator	User Guide Company	translator@firmglobal.com
☒	Translator 1	Translator 1	translator1	User Guide Company	translator1@firmglobal.com

Options

Encoding

Western European (ISO) ▼

Send as HTML

☐

Sender

john.doe@userguidecomp.com

Subject

Body

Include link

☐

Cancel

< Back

Next >

Finish

Figure 390 Selecting translators 1

2. Select the translators and define the other email properties.
 - o **Encoding** – Choose the appropriate encoding when sending emails in Unicode languages.
 - o **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.
 - o **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>
 - o **Subject** – Enter the subject header of the e-mail.
 - o **Body** – Enter the text that is to appear in the body of the e-mail message.
 - o **Include link** – Select this checkbox to automatically have a link (URL) to the translator interface at the bottom of the e-mail (default).

Step 1/2: Translator selection

Please specify recipient selection and email settings. p0012322

☒	Last name	First name	User name	Company	Email
☒	Translator1	Translator1	translator1	FIRM AS	kristinem@firmglobal.com
☒	Translator	Translator	translator	FIRM AS	kristinem@firmglobal.com

Options

Email format MIME encoded ▾
Encoding Western European (ISO) ▾
Send as HTML ☐
Sender kristinem@firmglobal.com
Subject Norwegian and Spanish Translations
Body

Dear ^firstname^ ^lastname^,

 Attached is the link to the project.....

 |

Include link ☒

Cancel
< Back
Next >
Finish

Figure 391 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.

#	Last name	First name	User name	Company	Email
1	Translator	Translator	translator	User Guide Company	translator@firmglobal.com
2	Translator 1	Translator 1	translator1	User Guide Company	translator1@firmglobal.com

Email preview (translator #1)

To translator@firmglobal.com
From johndoe@userguidecomp.com
Subject Norwegian and Spanish Translations
Body Dear Translator Translator,
 Attached is the link to the project.....
<http://192.168.12.66/confirm/translator>

Cancel < Back Next > Finish

Figure 392 Preview and send

- Click **Finish** to send the emails, click **Back** if you need to change to the email.
 On completion, a confirmation message is displayed.

Confirmation

p0278724

Confirmation

Finished sending 2 email(s).

OK

Figure 393 Example of the confirmation message

11.4. Translators' Interface

The translators enter the Translator via the URL in the email:

On-Demand only:
USA Server: <http://author.confirmit.com/confirm/translator/>
Euro Server: <http://author.euro.confirmit.com/confirm/translator/>

For On-Premise customers, the address is: <http://yourconfirmitserver.com/confirm/translator>.

Confirmit authors access Translator by clicking the Translator link in the Confirmit menu.

- Translators, click the link to display the login page.



Figure 394 The Translator splash-screen page

2. Type your User ID and Password into the appropriate fields in the login window.

The translators must log in using the userids and passwords they received in the email. They can change their passwords.

Note: The translator module requires Internet Explorer 5+.

When a translator has logged into the application, he/she will be presented with a project overview that will display all projects they have been assigned to translate.

3. Click on the project to display all project languages except the default language in the right column.

Project list

Please select a project/language to translate
 translator_n

Projects	Translate into
Confirmit User Project (p24456405)	Norwegian
	Spanish

Log Off
Change Password

Figure 395 Example of a translators' project list

11.4.1. Using Translator

When you have logged on to Translator, click on the language in the Project 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 in the editor toolbar are standard Windows-style tools.

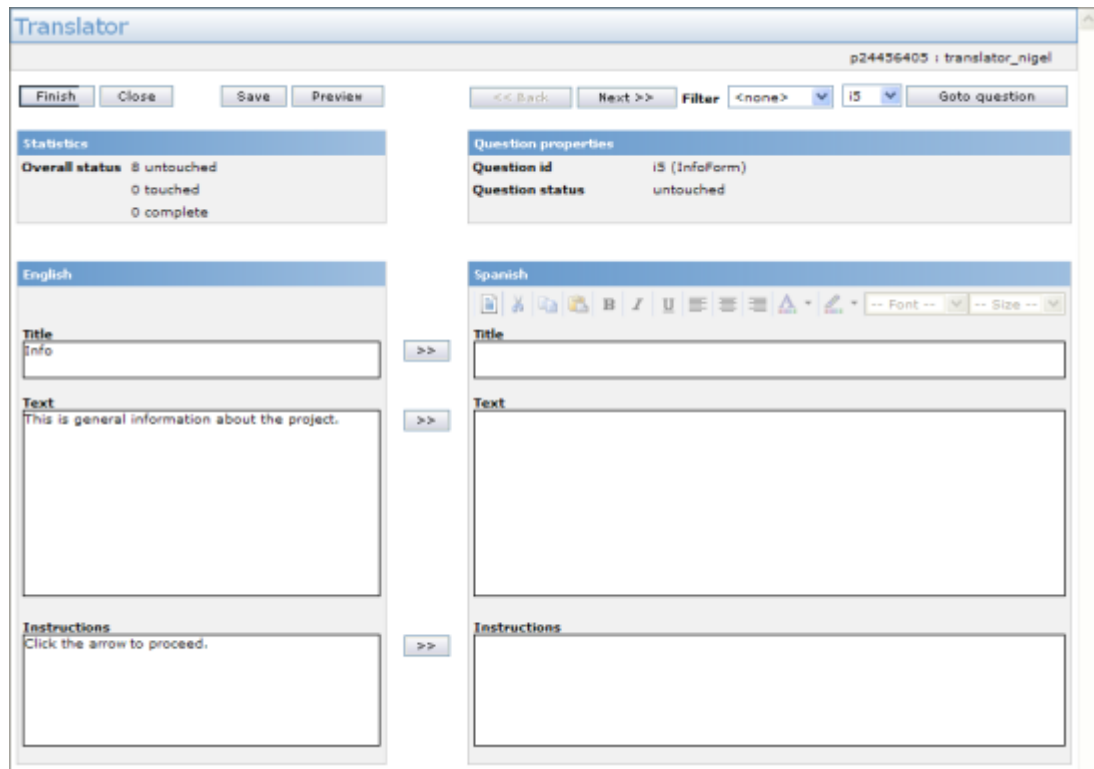


Figure 396 Example of the Translator page

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 (note: Click **Save** first to save the changes). 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 Project Overview (note: Click **Save** first to save the changes).
- **Save** - saves the changes made to the working language.
- **Preview** - displays the preview of the question: the default language and the working language (note: Click **Save** first to save the changes).
- **Back** - returns to the previous question in the questionnaire routing.
- **Next** - displays the next question in the questionnaire routing.
- **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.
 - o **Untouched** if no translation has been entered in the target language.
 - o **Touched** if some fields have been translated.
 - o **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.

<< Back
Next >>

Goto

Mineralvann ▼

End of routing

Question properties	
Question id	q14b (GridForm)
Question status	complete

Figure 397 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 Project owner, for example "Translator (translator1) has finished the Norwegian translation for project p0379335." The language that is completed is removed from the Project List and the status is updated in the Translation Overview in Confirmit, as in the example below.

General

Assign

Default language

English ▼

Email recipient of status notification

[Empty field]

Status

Language	Untouched	Touched	Complete	Finished
Norwegian	0	1	7	☒
Spanish	8	0	0	☐

Assigned translators

Last name	First name	User name	Company	Email
Bennett	Nigel	translator_nigel	Confirmit	[Redacted]

Figure 398 The translation is finished

Note: The project manager can change the status for a language if necessary. To do this, uncheck the Finished checkbox and click Save.

12. 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 project'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**.

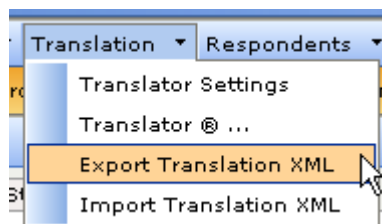


Figure 399 Selecting Export Translation XML

Note: You do not have to select the other project languages in Project Management > Overview > Languages. These will be added automatically when you import the XML translations for these languages.

The Export Translation XML overlay opens.

 A screenshot of the 'Export Translation XML' overlay form. It has a blue header bar with the title 'Export Translation XML'. Below the header, there are four fields: 'Email recipient' with the value 'documentation@confirmit.com', 'Target language' with a dropdown menu showing 'Afrikaans', 'Base language' with a dropdown menu showing 'English', and 'Enable fallback language' with a checkbox and a dropdown menu showing 'English'. At the bottom right, there are two buttons: 'Export translation XML' and 'Cancel'.

Figure 400 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 project languages (added in **Project 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.
 - o 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 version of the English version.
 - o 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.
 - o 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.
 - o 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 abovementioned 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 project 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 project ID and the Confirmit language code, for example pXXXXXXXXX_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.

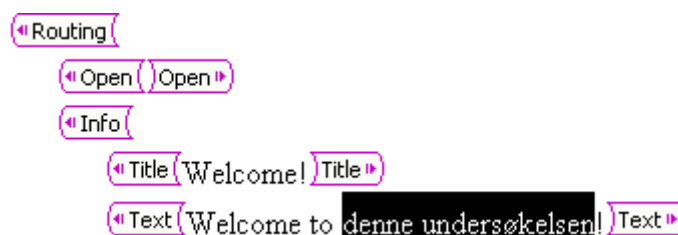


Figure 401 Translating in XML Word

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 project 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 and import it, this field may not be blank after the import. This is because during the import your Translation XML is merged into the survey version of the base language you selected. Therefore if you have a Translation XML 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.

13. Confirmit Scripts

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 Code Completion functionality (see the The Code Completion Functionality section on page 335 for more information).

Note: The functions are not described in detail here - they are described in the context in which they are most commonly used (for example `union()` in the code masks section). They are however not restricted to being used in only that context. Refer to the Confirmit Scripting manual for further details.

13.1. 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.

13.1.1. f('qID')

Its basic syntax is **f("qID")**, where qID is the question ID specified in Properties (see the Question Properties section on page 183 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.

13.1.1.1. Single

Text	Answers	Validation	Masking	Preview
Answers				
English	Precode	Weight		
Male	M			
Female	F			

Figure 402 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**.

13.1.1.2. Open Text

Name

What is your name?

Figure 403 Open Text question "name"

In this case, the code `f("name")` will return **John Smith**.

13.1.1.3. Multi

Text	Answers	Validation	Masking	Preview	Results	Languages
Answers						
English	Precode	Weight	RdgMulti%	ColWidth	BgColor	Punch
ABC	1					
CBS	2					
CNN	3					
FOX	4					
NBC	5					
None of them	99					Single

Figure 404 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.

13.1.1.4. Ranking or Open Text List

Figure 405 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 406 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 the Code and Scale Masks / Filtering Answer Lists / Scales section on page 324 for more information)

13.1.1.5. Grid

Hours watching

How many hours per week do you watch these channels?

	Less than 1 hour	1-2 hours	3-5 hours	6-10 hours	More than 10 hours
ABC	☐	☒	☐	☐	☐
CNN	☒	☐	☐	☐	☐
NBC	☐	☐	☒	☐	☐

Figure 407 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.

13.1.1.6. 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 408 Example of the answer list for the single question "favorite"

Favorite TV channel

What is your favorite TV channel?

☐ ABC
☐ CBS
☐ CNN
☐ FOX
☐ NBC
☒ Other, specify
☐ Don't know

Figure 409 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.

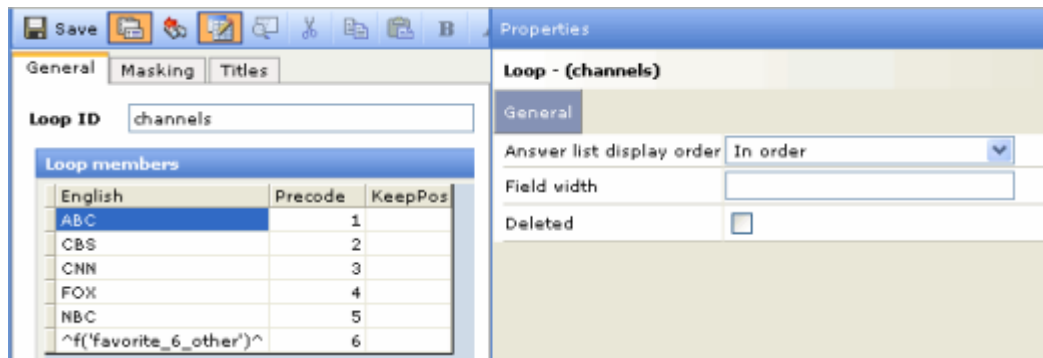


Figure 410 Other, specify in loops

In this case the text **MTV** will appear in the loop, not **Other, specify**.

13.1.2. 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 the Question Properties section on page 183 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.

13.1.2.1. 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).

13.1.2.2. 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).

13.1.2.3. 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*.

13.1.2.4. 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.

Text	Answers	Scale	Validation	Masking	Preview	Results	L
Answers							
English	Precode	Weight	Rdg%	ColWidth	BgC		
Less than 1 hour	1						
1-2 hours	2						
3-5 hours	3						
6-10 hours	4						
More than 10 hours	5						

Figure 411 Scale of grid "hours"

13.1.3. 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 or 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.

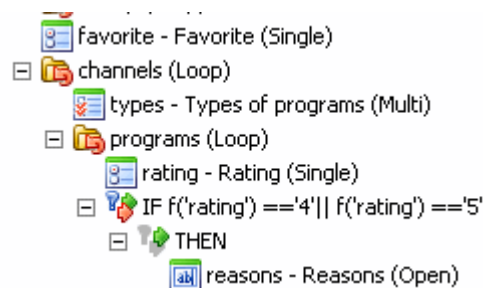


Figure 412 Nested loops

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.



General Masking Titles

Loop ID: programs

English	Precode	KeepPos
Sit-coms		
Soaps		
Children's Entertainment		
Education		
Sport		
News		
Movies		
Nature		

Add Add predefined Clear Delete

General Masking Titles

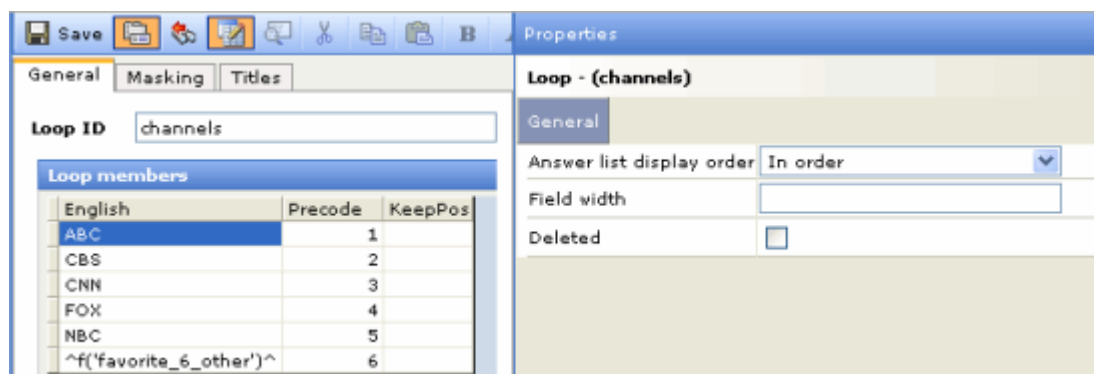
Precode mask

f('types')

Figure 413 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.



Save [Icons]

General Masking Titles

Loop ID: channels

English	Precode	KeepPos
ABC	1	
CBS	2	
CNN	3	
FOX	4	
NBC	5	
^f('favorite_6_other')^	6	

Properties

Loop - (channels)

General

Answer list display order: In order

Field width: [Input field]

Deleted: ☐

Figure 414 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 the Text Substitution/Response Piping section on page 328 for more information).

13.2. 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	

13.2.1. .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`.

13.2.2. .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** "code3" are answered in `qID`.

13.2.3. .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`.

13.2.4. .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`.

13.2.5. .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.

13.2.6. .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.

13.2.7. .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.

13.3. 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 the Question Properties section on page 183 for more information) or in the loop construct (see the Loops section on page 208 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 the Question Properties section on page 183 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.

13.3.1. `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.

13.3.2. `set()`, `nset()`, `nnset()`

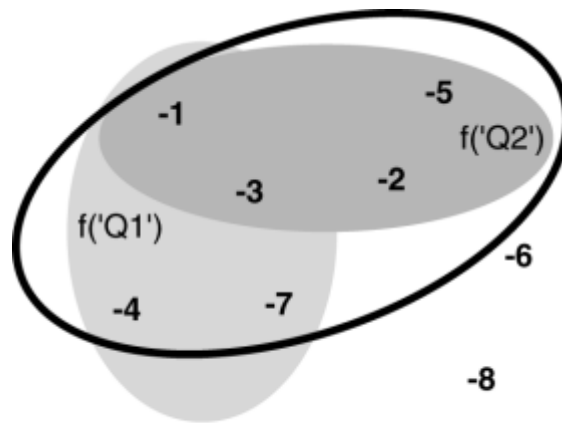
You may need to create sets yourself. The three functions described below should simplify this process.

- `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 consisting 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.

13.3.3. `.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()`.

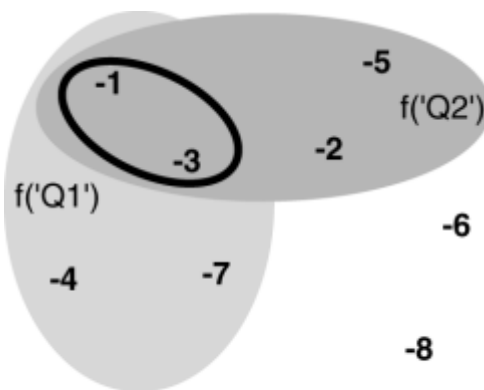


`f('Q1').union(f('Q2'))`

Example: `f('q1D').union(set('99'))` Here you will always include the answer alternative with code '99'

13.3.4. `.isect()`

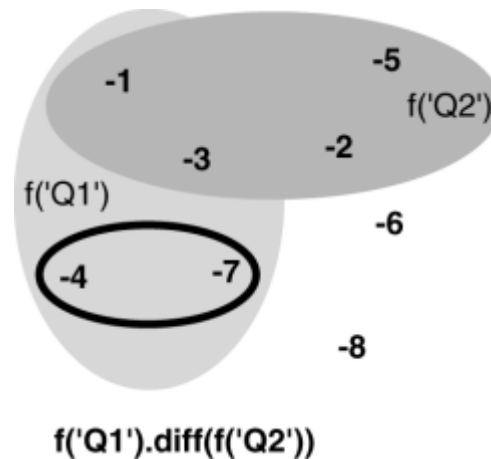
`f('Q1').isect(f('Q2'))` returns a new set that is the intersection of $f('Q1')$ and $f('Q2')$, that is a set consisting of all codes answered both in Q1 and Q2.



`f('Q1').isect(f('Q2'))`

13.3.5. `.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()`



Example: $f('qID').diff(set('1'))$ Here '1' is never included.

13.3.6. 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 the How to Add New Objects to the Questionnaire Tree section on page 160 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.

13.4. 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.

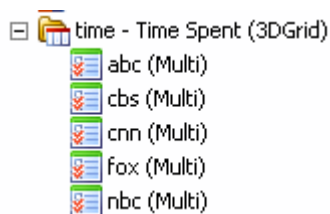


Figure 415 The "time" 3d-grid from the questionnaire tree

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.

Text	Validation	Masking	Preview
Column mask <code>f('TVchannels').inc('1')</code>			
Multi Question - (q14)			
General Advanced WI Features			
Columns	4		
Keep position	☐		
Open text	☒		
Numeric	☒		
Total digits	3		
Decimal places	1		
Lower limit	0		
Lower limit type	>=		
Upper limit	24		
Upper limit type	<=		

Figure 416 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:

	ABC	CNN	NBC
Monday	1		
Tuesday	1.5	0.5	0.5
Wednesday			
Thursday		0.5	2
Friday	3		1.5
Saturday			
Sunday			

Figure 417 The resulting "Time spent" question

13.5. Question Mask

Used to dynamically exclude and include questions in questionnaires. This functionality can also be used in Page objects (see the Page section on page 220 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')`

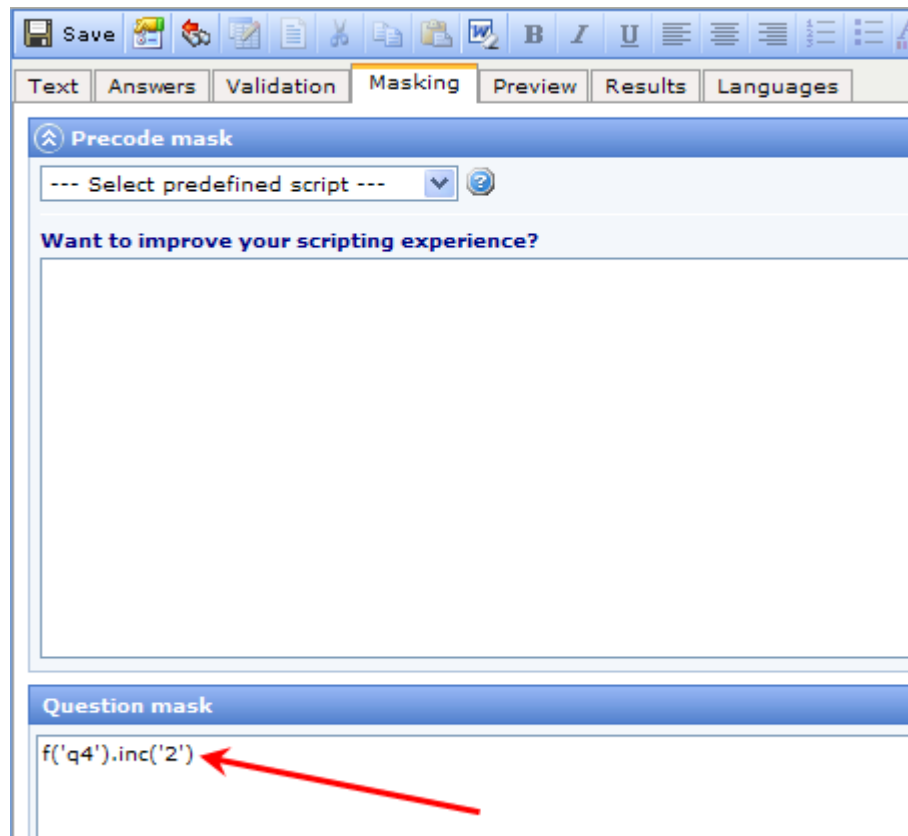


Figure 418 Example of Question masking

The Masking tabs for Single, Multi, Ranking, Grid, Numeric List and Open Text List questions include the Predefined Scripts functionality (see the Predefined Scripts section on page 205 for more information).

13.6. 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

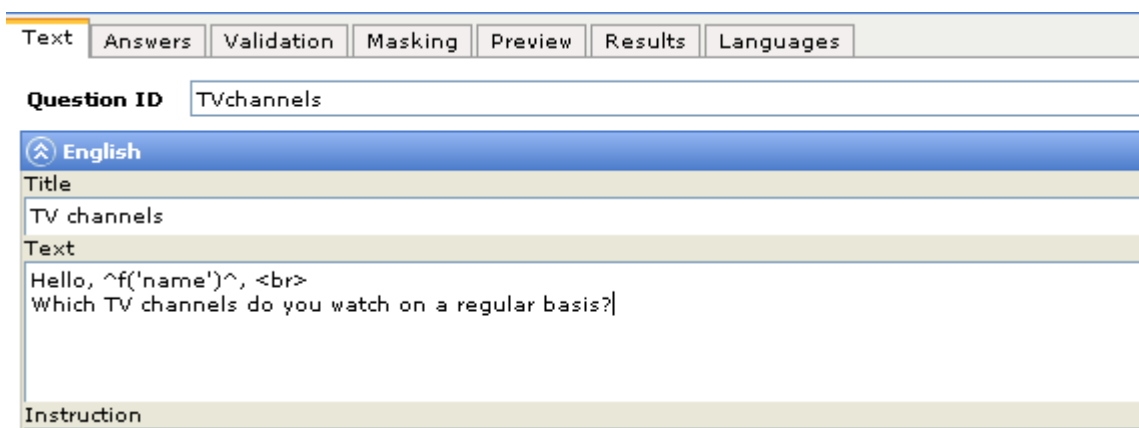


Figure 419 The TVchannels question

The respondent will see the question as shown in the figure below (the name will be different of course).

TV channels

Hello, John Smith.
Which TV channels do you watch on a regular basis?

- ☒ ABC
- ☐ CBS
- ☒ CNN
- ☐ FOX
- ☒ NBC
- ☐ None of them

Figure 420 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 <code>^f("qID")^</code>
Open text	The text answered in the text box.
Single	The text from the answer list corresponding to the code returned from <code>f("qID")</code> 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 <code>f("qID")</code> 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 <code>qID_code_other</code> (see the Question Properties section on page 183 for more information))
Loop	The text of the loop member corresponding to the iteration with code <code>qID</code> in the current language.

Question type	Returned from <code>^f("qID")["code"]^</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 <code>f("qID")["code"]</code> in the current language.

The same rules apply to loop questions, but there you may also need to specify the iteration(s) (see the Loops - f('qID','iteration_code','iteration_code',.....) section on page 321 for more information).

13.6.1. 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).

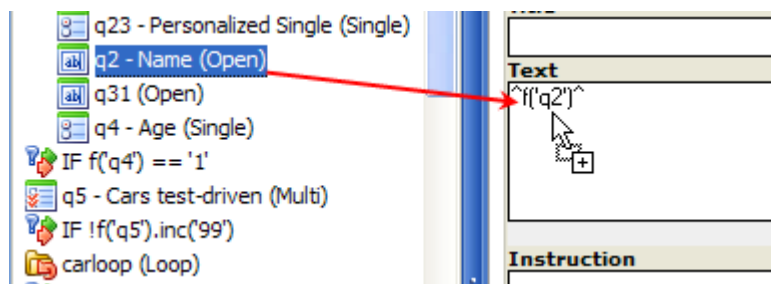


Figure 421 Example of dragging-and-dropping a question for piping

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.

13.7. 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.

Any logic created using the other functionality within Confirmit, such as text piping, question masking etc. can be controlled by the trigger function.

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

Note: "Dynamic Questions" is supported in IE6+ (Windows), Firefox 1.5+, Opera 9+ and Safari 2+. This functionality is only available in surveys using Survey Layouts (see the Survey Layouts section on page 50 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.

13.7.1. 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 project (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.

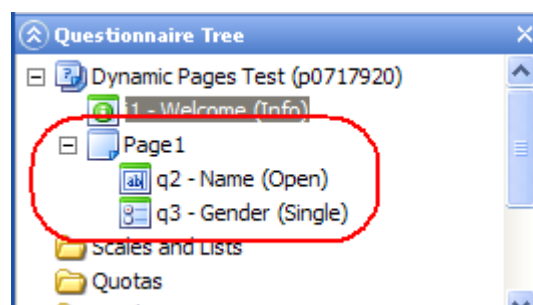


Figure 422 The page containing the two questions

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.

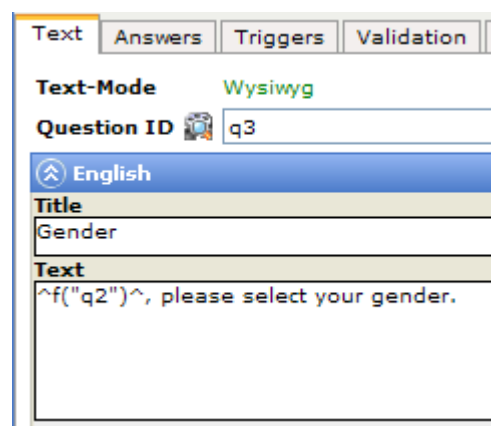


Figure 423 Piping the answer text from q2 into q3

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**.

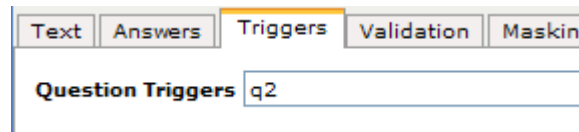


Figure 424 Setting the Trigger

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.

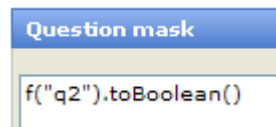


Figure 425 The masking expression

8. Save the changes.
9. Right-click on the project in the Questionnaire Tree and select **Quick Test > Quick Test (with rebuild)** from the menu. The results should be as shown below.

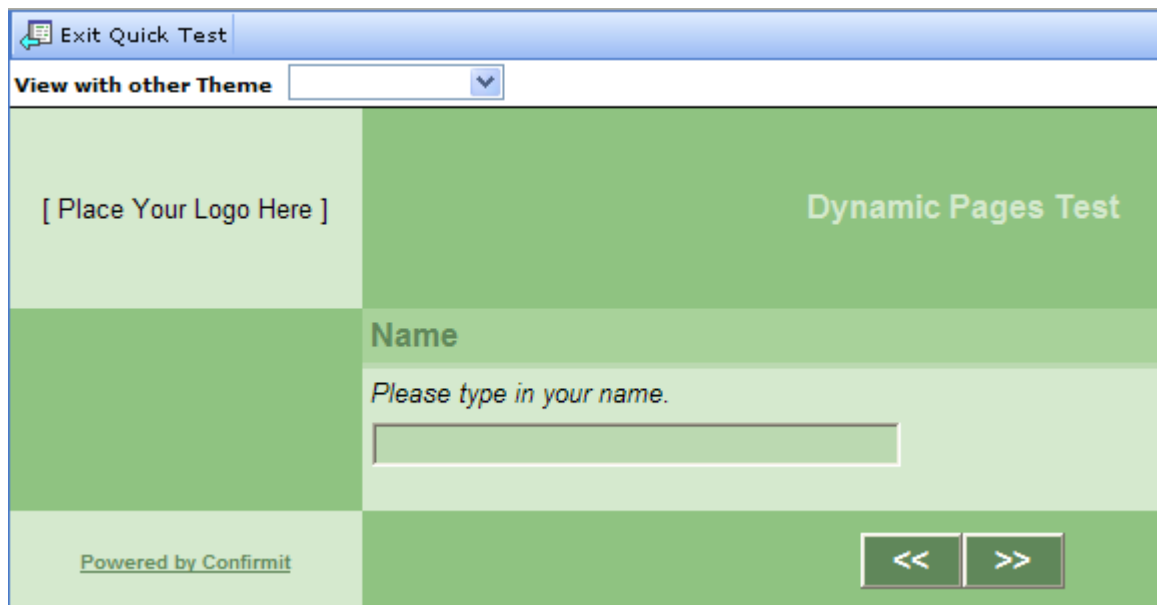


Figure 426 The page before the Name question is answered

Figure 427 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.

13.8. 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.

13.8.1. 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 the Preparing for Data Collection section on page 353 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:

13.8.1.1. 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 the Question Properties section on page 183 for more information).

13.8.1.2. 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.

13.8.1.3. 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.

13.8.1.4. 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.

13.8.2. 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.

13.9. 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.

13.10. The Code Completion Functionality

Code Completion is a downloadable 3rd-party add-on that means that you no longer need to remember or look up which properties belong to which classes and which parameters the various methods accept. Instead, these are available at the touch of a button. The add-on automatically color-codes key words, and provides lists of selectable options under specific conditions while scripting.

Code Completion must be installed locally. Once downloaded and installed, you must contact Confirmit to have the add-on activated at company level. The Code Completion functionality is then available in Confirmit wherever script coding can be used.

Note: Code Completion is offered as a Beta, to be used by clients at their own risk. Support for this functionality will be offered, but not to the same extent as for the rest of the Confirmit application.

The figure below demonstrates Code Completion in action:

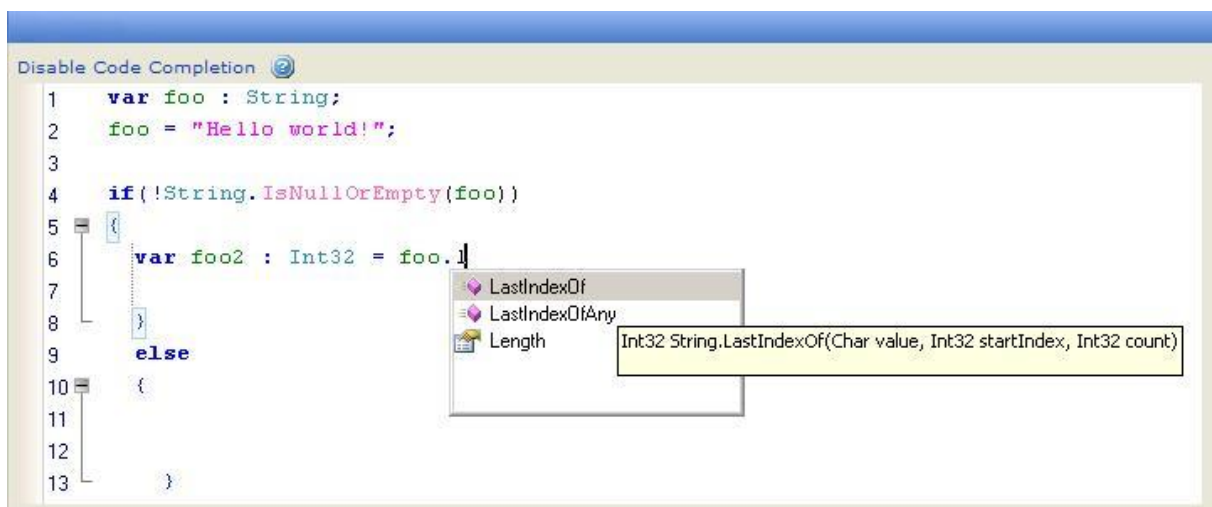


Figure 428 Example of Code Completion in action

13.10.1. Code Completion Requirements

For Code Completion to work on your computer, the following requirements must be fulfilled:

1. .NET Framework 2.0 must be installed on your computer. If you do not already have this installed, you can download it from the following URL:

<http://www.microsoft.com/downloads/details.aspx?familyid=0856EACB-4362-4B0D-8EDD-AAB15C5E04F5&displaylang=en>

Note: This URL is accessible as a link on the information page that opens when you click the Enable Code Completion link.

2. You must configure Internet Explorer to classify Confirmit as a trusted site. Proceed as follows:
 - i. In Internet Explorer, go to the **Tools > Internet Options** menu command.
 - ii. Go to the **Security** tab.
 - iii. Select the **Trusted sites** zone.
 - iv. Click the **Sites** button
 - v. Under "Add this website to the zone", write ***.confirmit.com** and click **Add**.
 - vi. Click **Close**.
 - vii. Click **OK**.
 - viii. Close the browser and reopen it to apply the new settings.
3. You must download and install the Code Completion application.

Note: The information page that opens when you click the Enable Code Completion link contains a download link to this file.

Note that the first time you open the script of a component after the above changes have been applied, the system will take some time to load because your computer will need to download some information.

13.10.2. Download and Install Code Completion

To download and install the add-on:

1. Start Confirmit and open a project.
2. Go to the **Survey Designer** menu command and double-click on a question to open the Question Details page.
3. In the Question Details page, go to a tab that allows scripting, for example the Validation or Masking tab.

The download link is provided on all Confirmit pages in which scripting can be used, for example on a question's Masking tab as shown below.

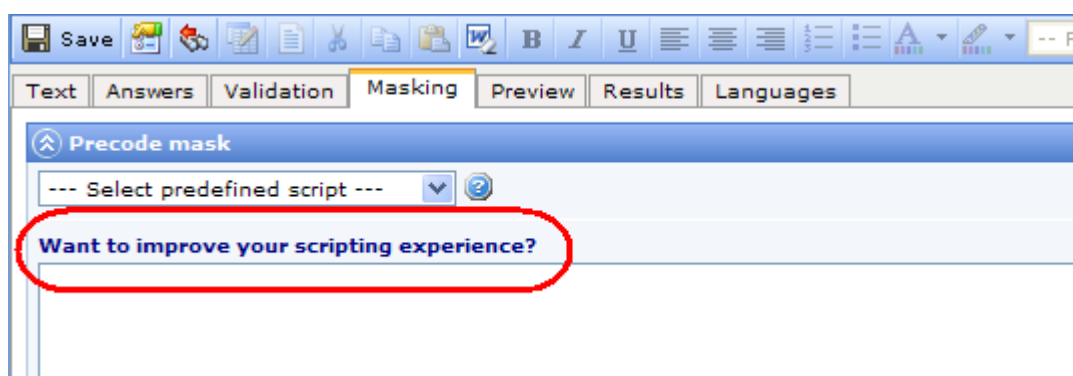
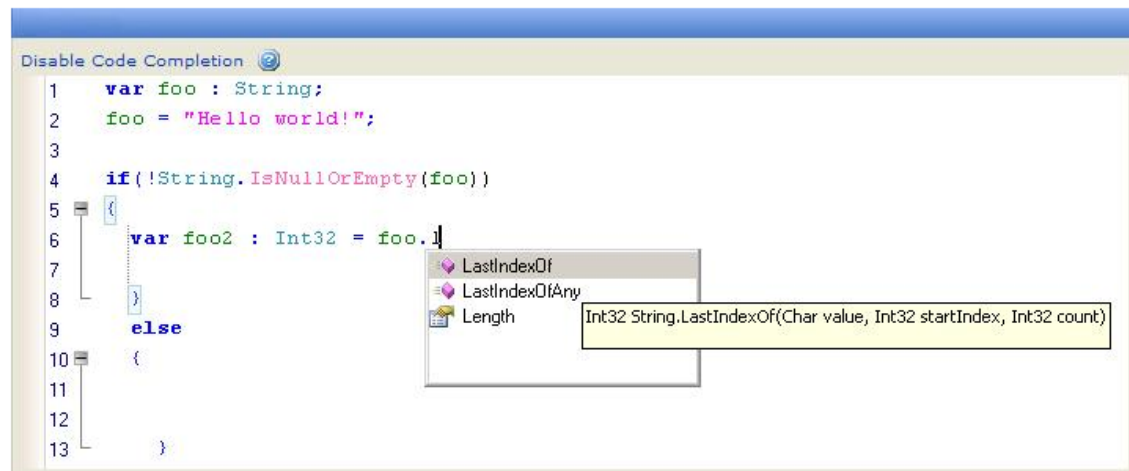


Figure 429 Example of the Enable Code Completion link

4. Click the link.
A new window opens containing a license agreement.
5. Read the agreement, check the acceptance box (assuming you accept the terms of the license), then click **OK**.
A new page opens containing installation instructions and links to the appropriate download sites.

Utilize the power of Confirmit Code Completion **BETA**

In order to improve the scripting experience in Confirmit, we offer Confirmit Code Completion. Code completion support means that you no longer need to remember or look up which properties belong to which classes and which parameters the various methods takes in. Instead, these are available at the touch of a button. The image below demonstrates how code completion works:



Code Completion Requirements

In order for code completion to work on your computer there are some requirements that must be fulfilled:

- 1) The .NET Framework 2.0 must be installed on your computer. If you do not already have this installed, it can be downloaded from [here](#)
- 2) You must download and run the following [file](#)
- 3) You must configure Internet Explorer to classify Confirmit as a trusted site. The section below describes how this is done.

How to configure IE to classify Confirmit as a trusted site in IE7

- 1) In Internet Explorer, click Tools->Internet Options
- 2) Click the Security tab
- 3) Select the zone "Trusted sites"
- 4) Click the button "Sites"

Figure 430 The download page with instructions and links to the sites

6. Follow the instructions.

13.10.3. Using Code Completion

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. 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 **CTRL+G** to go to a specific line in the script, and **CTRL+F** to search.
4. Press **Tab** or **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.

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.
2. The declaration for the function will pop up just under the insertion point. The first parameter in the list appears in bold.
3. To switch among functions, use the UP or DOWN arrow keys.

4. As you type the function parameters, the bold changes to reflect the next parameter that you need to enter.
5. 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**.

14. 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.

14.1. 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 project by starting from the project folder, or starting from a particular question or node.

1. In the questionnaire tree, right-click on the project 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.

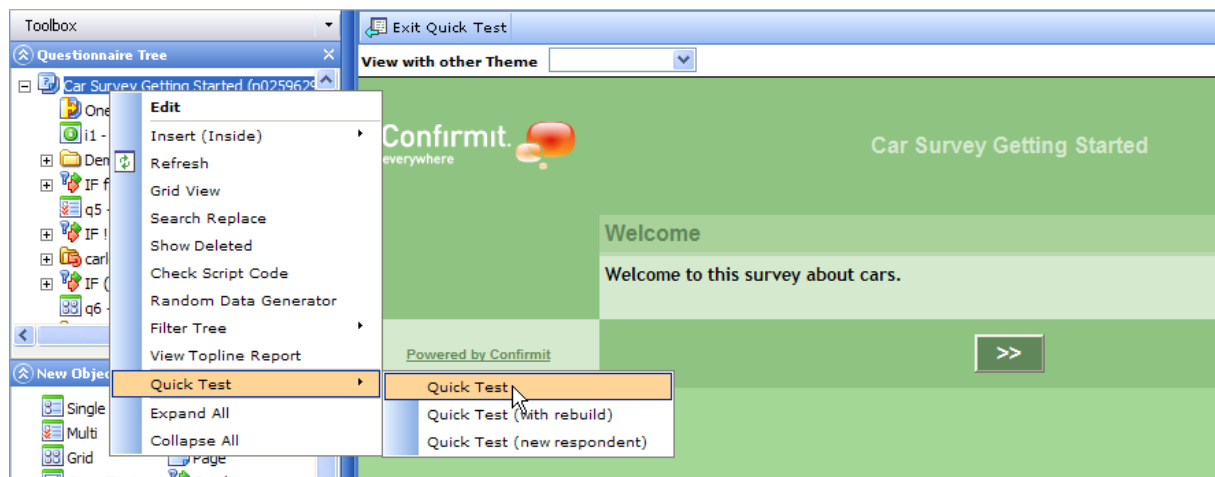


Figure 431 Example of the quick test

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)**.

Note: Hidden questions (see the The General Tab section on page 184 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.

14.2. Check Script Code

The Check Script Code functionality will check your project 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 project, 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 The Random Data Generator section on page 343 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 project 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.

Question Id	Error	Line	Column
	Expected \')	2	1
q7	Unterminated string constant	1	30

Figure 432 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.

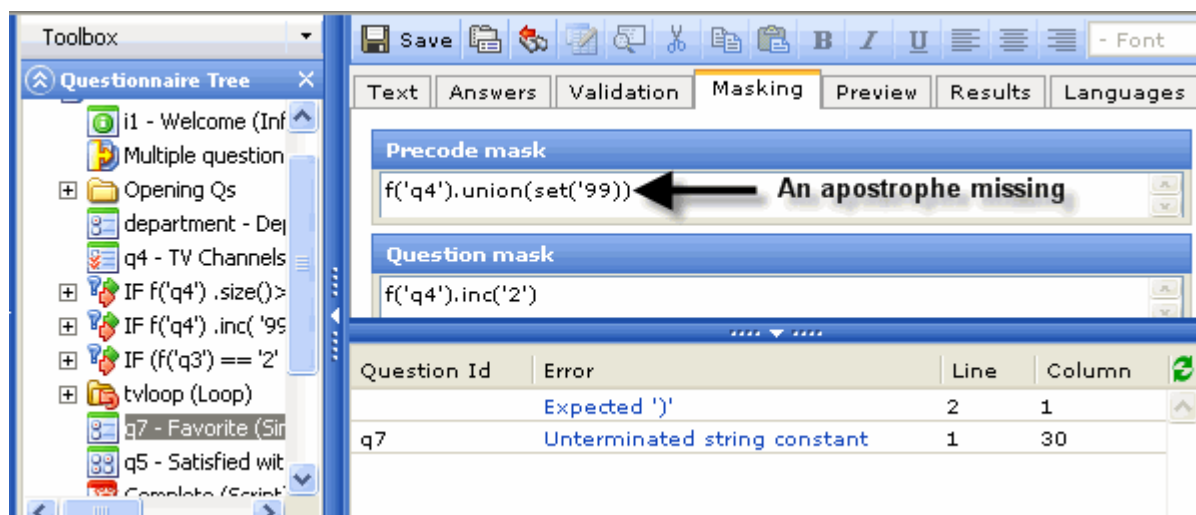


Figure 433 Example of an opened error

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.

14.3. 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.

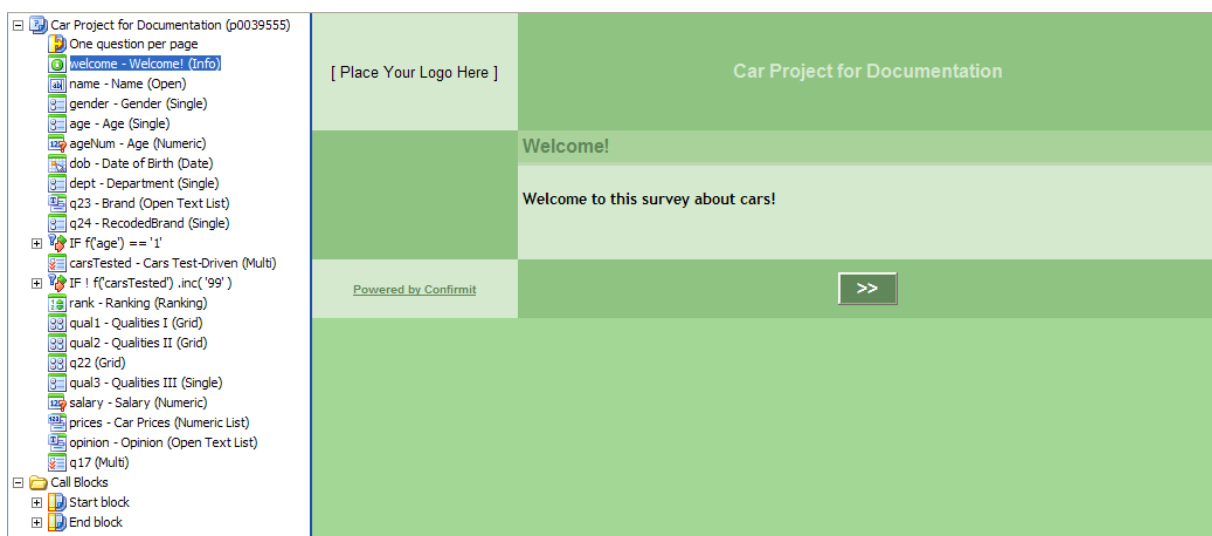


Figure 434 Example of the Test Interview page for a project

Right-click on the project name in the Questionnaire Tree to open a drop-down menu with a number of options.

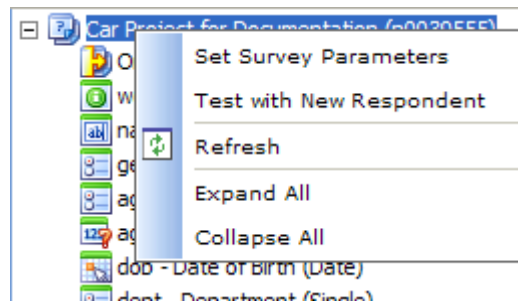


Figure 435 The Test Interview mode right-click menu

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 the Setting Portal, Theme and Language Via Parameters in the URL section on page 468 for more information).

Figure 436 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.

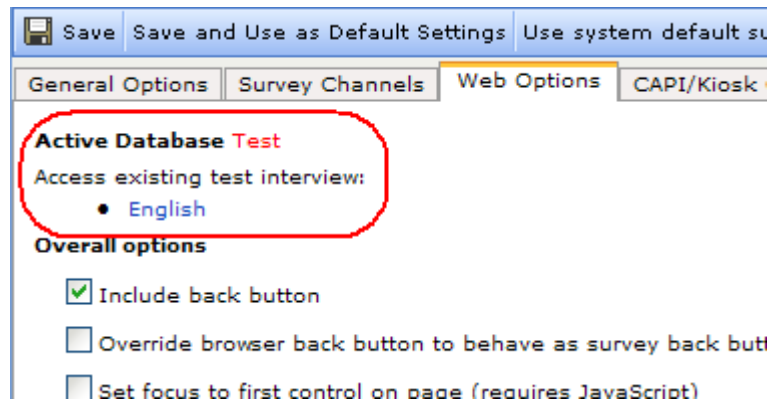


Figure 437 The language link in the Survey Settings > Web Options tab

14.4. 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 that Confirmit must be running in Test mode, and 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.

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 the Preparing for Data Collection section on page 353 for more information) or through the "Check Script Code" functionality (see the Check Script Code section on page 339 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.

Note: The RDG will not work on the 8.1 survey engine, only on the standard, .NET survey engine. This means that the script code in your survey must be written in JScript.NET.

14.4.1. 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.

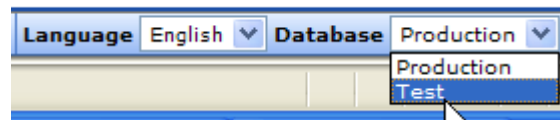


Figure 438 Select the Test database

1. Go to the **Designer > Quality Control > Random Data Generator** menu command.

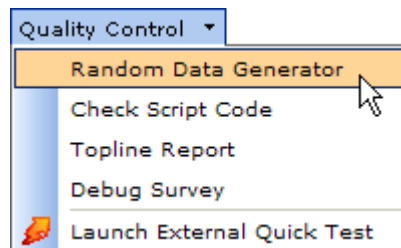


Figure 439 Starting the Random Data Generator

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.

Active Database Test

Generate database ☐ Update existing database (rebuild) ▼

Generate web interview ☐ Edit Survey Settings

No of respondents 10 ▼

Respondent language

☒ Random respondent language

☐ Active Language English

Generate

Figure 440 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.

14.4.2. 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 441 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:

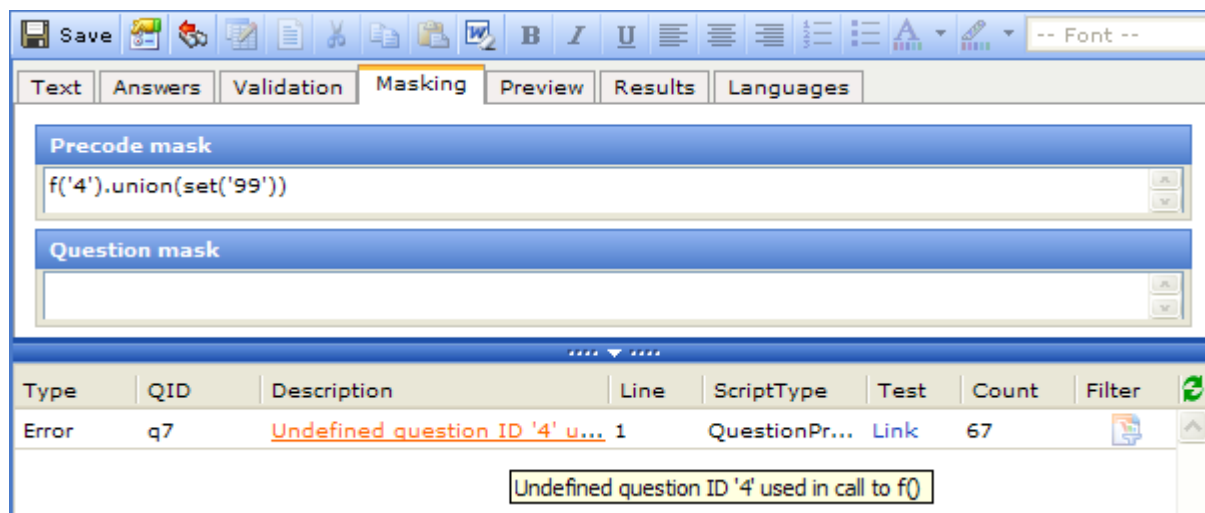


Figure 442 Example of a list of errors

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.

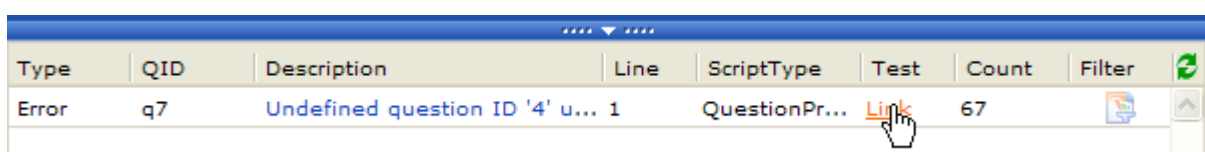


Figure 443 Example of the Link page

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.

Active Database Test

Filtering

Advanced *No active filter* [Edit...](#) [Clear](#)

Rdg *Respondents with script error in q7 line 1* [Clear](#)

Figure 444 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.

14.4.3. 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 correctness of the error through entering the link of the first respondent experiencing the error, investigating the test results with Rapid Results (see the Rapid Results section on page 501 for more information) or looking at the test results in Survey Data Editor (see the Edit Survey Data section on page 570 for more information).

The figure below shows an example of a user-defined validation that checks that the number of answers to a multi does not exceed 3:

The screenshot shows the Confirmit 16 Authoring User Guide interface. The top toolbar includes icons for Save, Undo, Redo, Cut, Copy, Paste, Bold, Italic, Underline, and Font settings. Below the toolbar are tabs for Text, Answers, Validation, Masking, Preview, Results, and Languages. The Validation tab is active, showing a text area for Validation code. The code is as follows:

```
if(f("q4").size()>3)
{
  RaiseError();
  SetQuestionErrorMessage(LangIDs.en,"Please do not select more than three items.");
}
```

Below the code area is a table with columns: Type, QID, Description, Line, ScriptType, Test, Count, and Filter. The table contains one row with the following data:

Type	QID	Description	Line	ScriptType	Test	Count	Filter
Warning	q4	Please do not select more t...	-1	UserCodeV...	Link	46	

Below the table is a text box containing the message: "Please do not select more than three items."

Figure 445 Warnings from User-Defined Validation

14.4.4. 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 selecting "I do not watch TV" on q4 are screened.

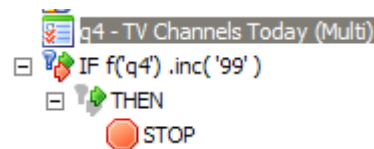


Figure 446 Questionnaire with Screening

To minimize the number of "Do not watch" responses, you can specify a low percentage in the RDG% column of the answer list, as shown below:

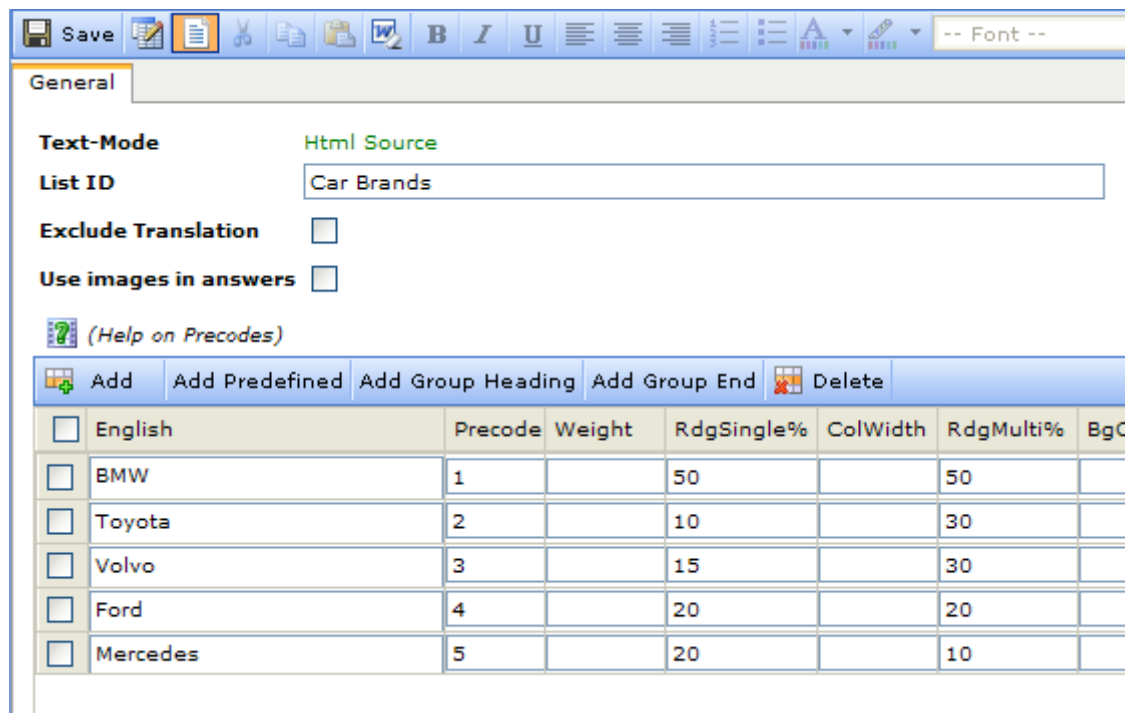
English	Precode	RdgMulti%	Exclusive	KeepPos	Other
channels					
Other	98		☐	☒	☒
I do not watch TV	99	1	☒	☒	☐

Figure 447 Setting the RDGMulti% 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 predefined answer list both of these columns are available.



General

Text-Mode Html Source

List ID

Exclude Translation ☐

Use images in answers ☐

 (Help on Precodes)

 Add  Add Predefined  Add Group Heading  Add Group End  Delete

☐ English	Precode	Weight	RdgSingle%	ColWidth	RdgMulti%	BgC
☐ BMW	1		50		50	
☐ Toyota	2		10		30	
☐ Volvo	3		15		30	
☐ Ford	4		20		20	
☐ Mercedes	5		20		10	

Figure 448 RdgSingle% and RdgMulti% in a predefined 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.

14.4.5. 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.

14.5. 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 The Random Data Generator section on page 343 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.

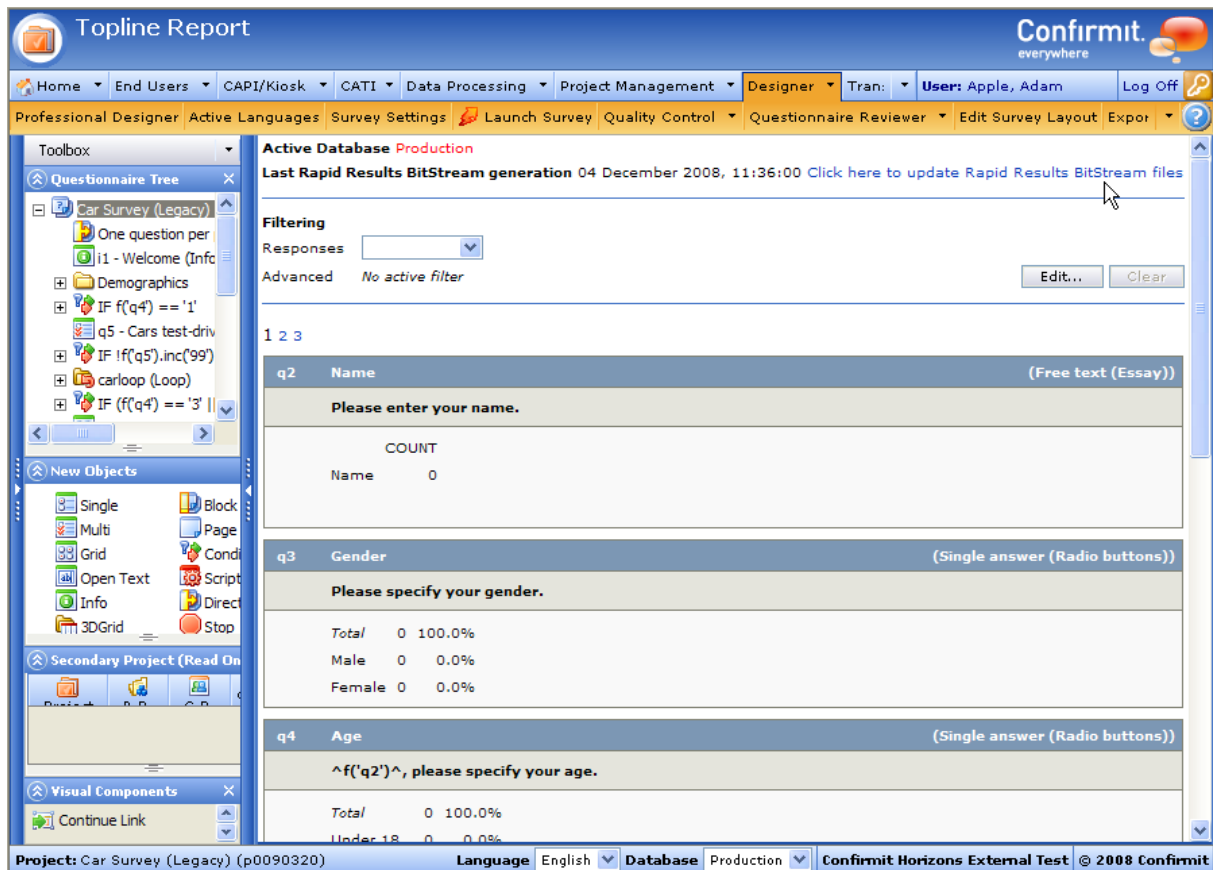


Figure 449 Example of a Topline report

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 The Advanced Filter Designer section on page 530 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.

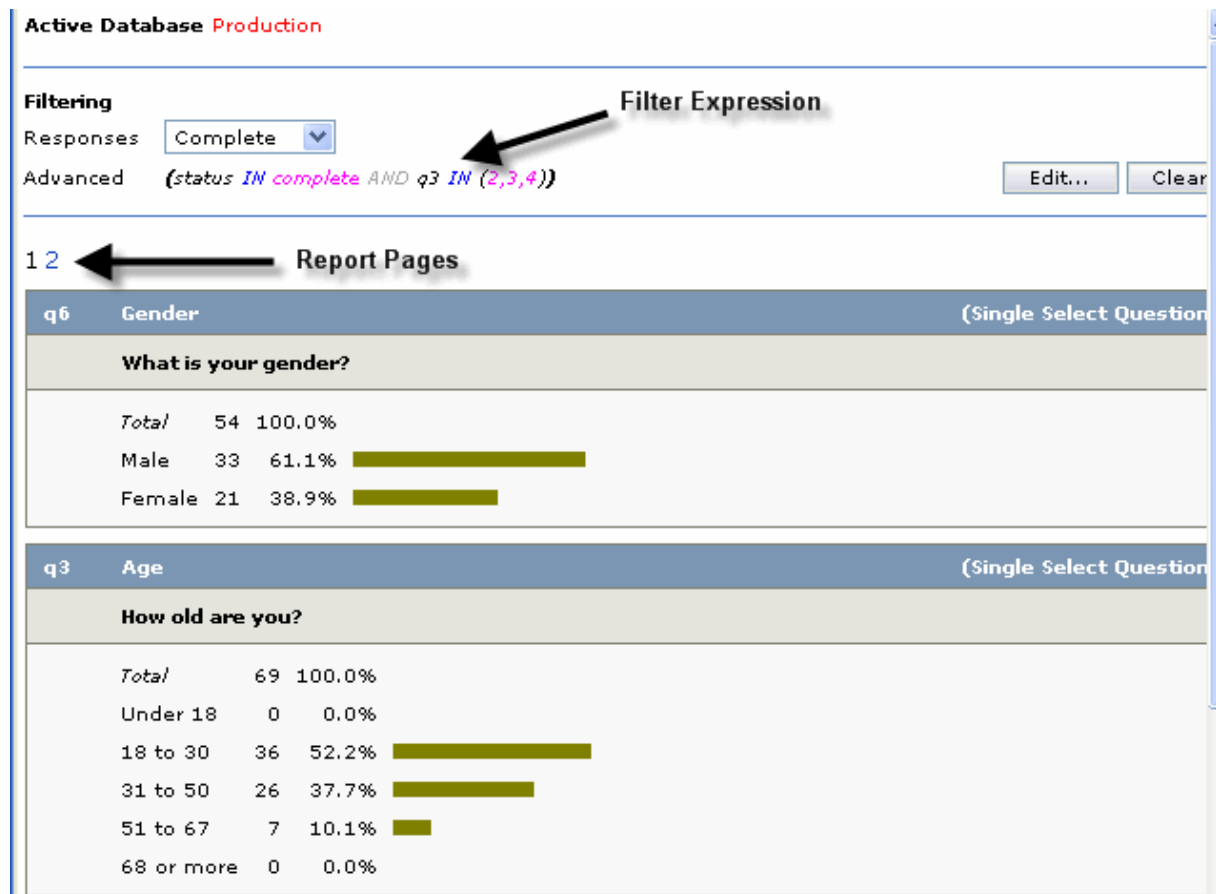


Figure 450 Example of a filtered topline report

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.

14.5.1. Loops in Topline Reports

When you enter the topline report for a loop, you can look at the data for each loop iteration separately.

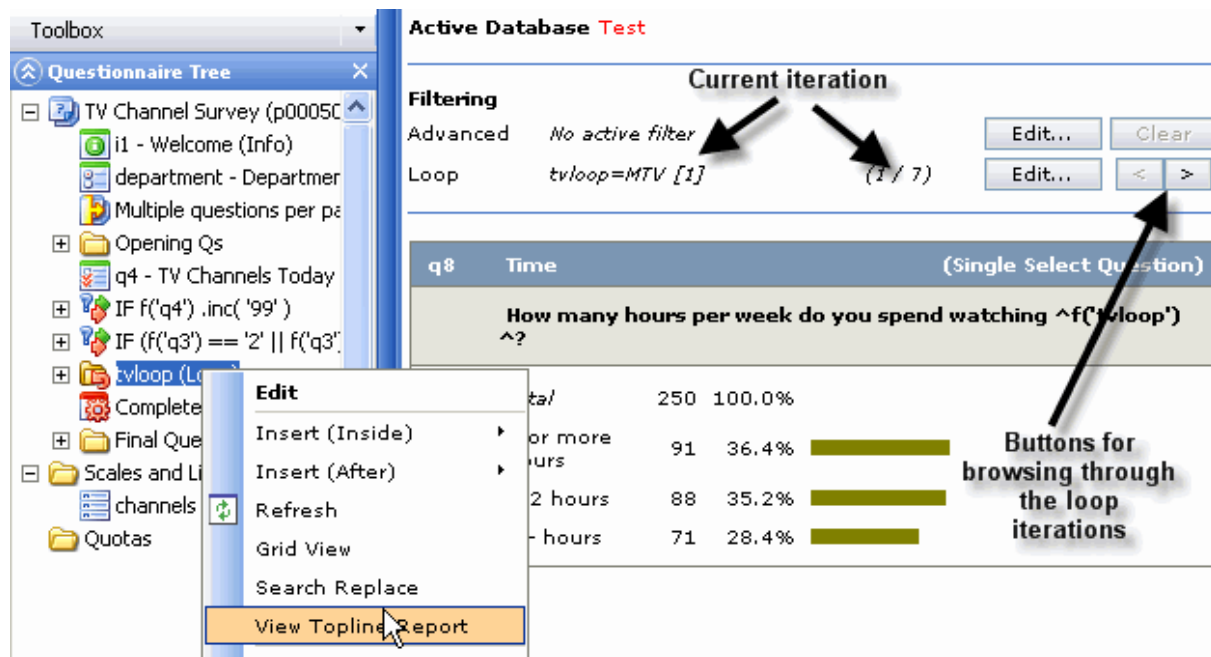


Figure 451 Example of a top-line report for a loop

14.6. 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: 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.

Options

Data Storage Legacy format (pre-v12.5)

Generate database ☒ In-Memory database

Generate web interview ☒ Edit Survey Settings

Survey modes

☒ Web survey

☐ CAPI/Kiosk survey

Launch Survey

Figure 452 The Launch External Quick Test page

2. 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).

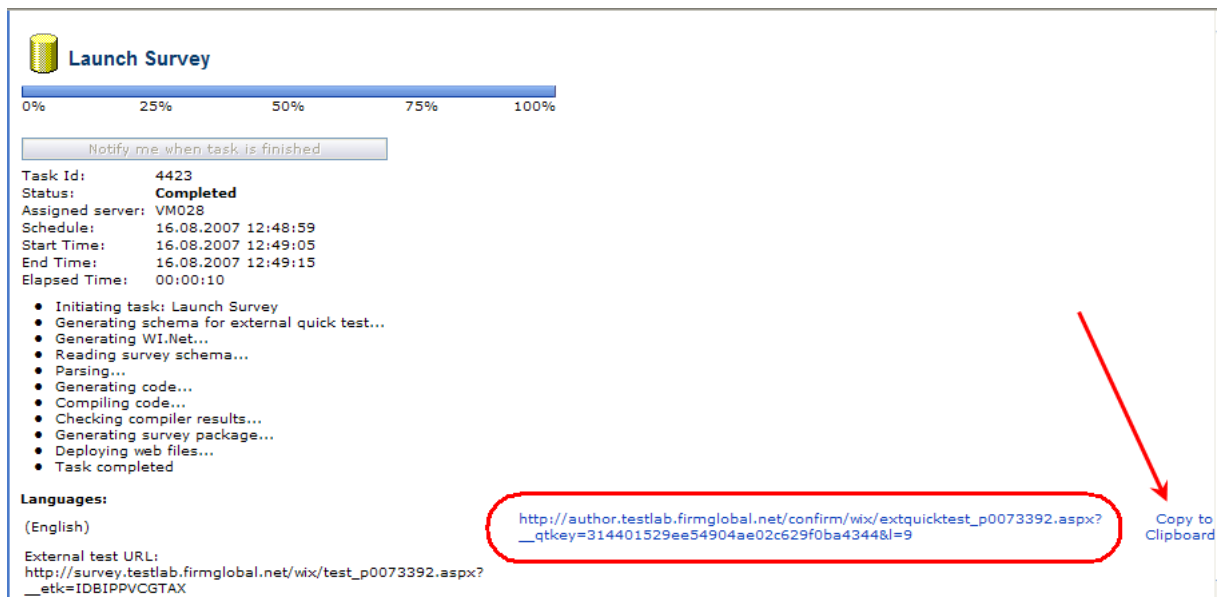


Figure 453 The Task page with the test link

3. 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 project on completion.

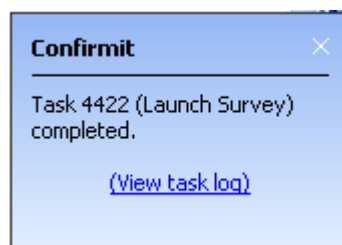


Figure 454 Example of the Task Notification popup

15. 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.

15.1. 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 **Project Management > Survey Settings** menu command. This page can contain up to seven tabs as follows:

- General Options (see the The General Options Tab section on page 353 for more information).
- Survey Channels (see the The Survey Channels Tab section on page 355 for more information).
- Web Options (see the The Web Options Tab section on page 356 for more information).
- CAPI/Kiosk Options (see the The CAPI/Kiosk Options Tab section on page 363 for more information).
- CATI Options (see the The CATI Options Tab section on page 364 for more information).
- Layout (see the The Layout Tab section on page 365 for more information).
- Validation & XSS (see the The Validation & XSS Tab section on page 369 for more information).

Note: CATI and CAPI are chargeable add-ons. The CAPI and CATI 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 project, you will have to recompile and regenerate the project 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 the Quality Control section on page 339 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 the How to Create Default Survey Settings Templates section on page 370 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.

15.1.1. 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.

Save

Save and Use as Default Settings

Use system default survey settings

General Options

Survey Channels

Web Options

CAPI/Kiosk Options

CATI Options

Layout

Validation & XSS

Active Database

Production

General Options

☐ Enforce https access to survey

☒ Encrypt system request parameters

☒ Disable unencrypted QID request parameter (recommended to prevent respondents from tampering with the survey urls to skip to specific questions)

ⓘ If a redirect is used with an unencrypted QID request parameter when this setting is enabled the redirect will be to the start of the survey.

☐ Use Unicode (UTF-8) encoding for all languages used in the survey

☐ Override domain in survey urls

☒ Override optimistic quota timeout (mins) ⓘ

☐ One question per page

Testing Options

☐ Hide background variables

☐ Hide panel variables

☐ Hide hidden variables

ⓘ These settings apply to test mode, quick test and external quick test. For Random Data Generator (RDG), the settings for background variables and panel variables apply and will not be populated by RDG if set to hidden.

Handling of invalid data set from background/panel variables and scripts ⓘ

Undefined code(s) in single or grid questions ⓘ

☒ Survey continues and undefined code(s) are stored where possible. Survey aborts if code(s) cannot be stored

☐ Survey aborts on undefined code(s)

☐ Survey continues on undefined code(s), code(s) not stored

Invalid data for numeric questions ⓘ

☒ Survey aborts if data is invalid

☐ Survey continues without storing if data is invalid

Over-sized texts on open text questions ⓘ

☒ Survey aborts on over-sized texts

☐ Survey continues with over-sized texts truncated and stored

ⓘ These settings control the behavior when attempting to store invalid data through background variables or panel variables, or when setting values from scripts. The settings have no affect for questions the respondents are filling in. When the respondents submit answers, the built-in validation will ensure that invalid data is not entered and present standard error messages to the respondents.

Figure 455 The Survey Settings > General Options tab

- **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 project, 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 the File Library section on page 115 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__=KKCCCKburQTJA0nxoy3zppzwMNq7TPEZCTqPH8EzXazrpu2_FkhnkHIS-bKIWXZM_0

If the parameters (r, s, ...) are transmitted in clear text when this feature is turned on, the parameter values will be ignored. 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".

- **Disable QID request parameter...** - prevents respondents from tampering with the survey URLs to skip to specific questions (disabled by default in new surveys).
- **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 occur when the respondent enters characters not expected in the current language/codepage into an answer, which is then saved incorrectly.
- **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 the Using Your Own Domain Name for Confirmit Surveys section on page 362 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 use SSL 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 the Optimistic Quotas section on page 269 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.
- **Hide background variables** - hides these variables when using the test functionality (see the Quality Control section on page 339 for more information).
- **Hide panel variables** - hides these variables when using the test functionality (see the Quality Control section on page 339 for more information).
- **Hide hidden variables** - hides these variables when using the test functionality (see the Quality Control section on page 339 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 project 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.

15.1.2. The Survey Channels Tab

The Survey Channels tab is where you define the type of survey - a Web survey, CAPI/Kiosk survey, CATI survey, or any combination.

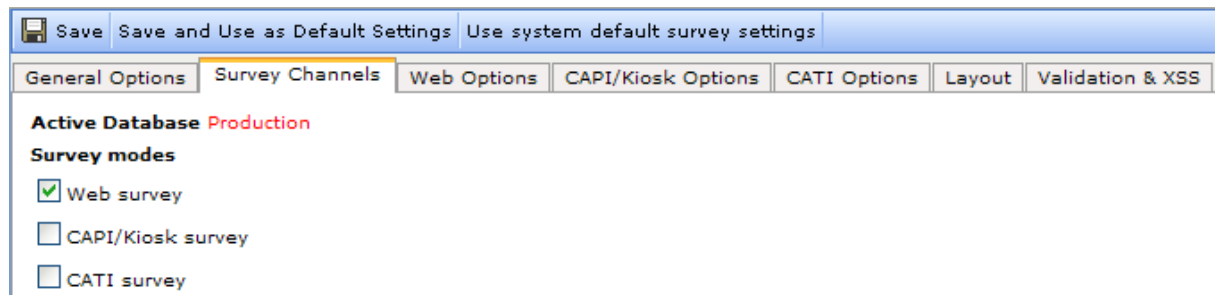


Figure 456 The Survey Settings > Survey Channels tab

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.

Note that you must select the CAPI/Kiosk Survey option to activate the options on the CAPI/Kiosk Options tab (see the The CAPI/Kiosk Options Tab section on page 363 for more information), and the CATI Survey option to activate the options on the CATI Options tab (see the The CATI Options Tab section on page 364 for more information). When the CATI Survey option is selected, an additional "Telephony" object becomes available in the New Objects toolbox.

15.1.3. 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.

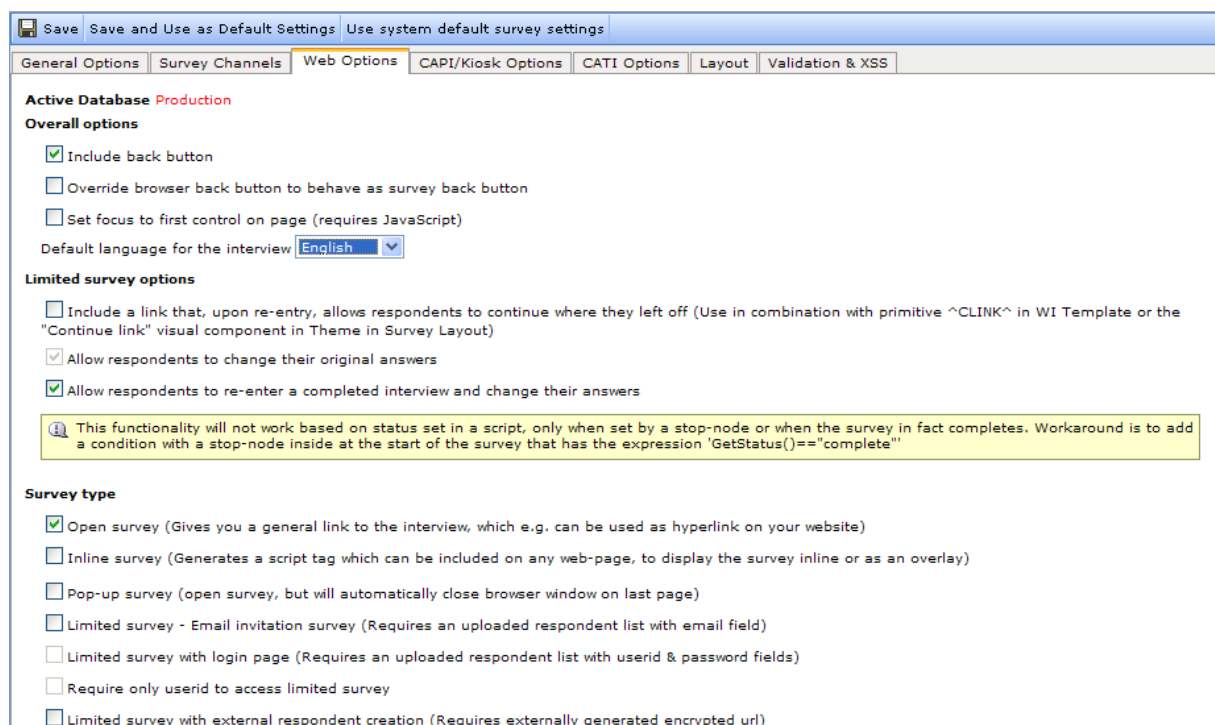


Figure 457 The Survey Settings > Web options

When you select the Survey Type options, various other options may become available.

15.1.3.1. 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.

- **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. Note that this functionality is not supported by all browsers - specifically, Chrome and Safari are not supported.
- **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.
- **Default language for the interview** - select the language to be used as default from the list of languages available for the survey.
- **Include a link that, upon re-entry...** - this feature applies to Limited Surveys with the Generate Back Button option selected, and must be used in combination with the WI Template primitive ^CLINK^ to display the Continue link. 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 respondents do not want to modify previously given answers, they will be able to continue taking the survey from the point where they left off by clicking the Continue link.
- **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:
 - o 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.

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 the Handling Respondents in Limited Surveys section on page 384 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 The Inline Survey Options section on page 358 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 the Themes section on page 59 for more information). This theme will then be used by default for inline surveys.
- **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. The browser window will close automatically when the respondent reaches the last page. If you launch the project in the Test database first, the Pop-up Wizard opens in which you can set up the pop-up window.

- **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 the Handling Respondents in Limited Surveys section on page 384 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/pXXXXXXXX.aspx?r=112&s=VDDNCVPK&l=9` or

`https://survey.confirmit.com/wix/pXXXXXXXX.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 26⁸ 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 the Preparing the Respondent List section on page 384 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 the Handling Respondents in Limited Surveys section on page 384 for more information).

- **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.
- **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 document that is available from Confirmit on request.

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 The Single Sign-on Functionality section on page 361 for more information).
- **Community Panel** - this option is only visible when the user has licensed the Community Panel functionality. For further information, refer to the Community Panel User Guide.

15.1.3.2. 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 Project Overview page (see the The General Tab section on page 128 for more information), which you can then include on the web page. When you check the Inline Survey box, a panel of options appears.

☒ Inline survey (Generates a script tag which can be included on any web-page, to display the survey inline or as an overlay)

Display options Display survey to every 1 visitor to the webpage. Cookie options No cookie Name: ConfirmitInlineSurvey_p0039555 , expires in 90 days.	Window options Width Show as overlay ☐ Overlay opacity

Figure 458 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.
- **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: 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 500 characters.

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.

15.1.3.3. 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 (see the The Web Options Tab section on page 356 for more information), then launch the project in the **Test** database, then the Pop-up Wizard opens (see the The Pop-up Script Wizard section on page 359 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 project 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 (go to [The Survey Type Options](#) for more information), then save the changes.

15.1.3.3.1. The Pop-up Script Wizard

When you have checked the **Pop-up Survey** box in the **Survey Settings > Web Interview** tab (go to [The Survey Type Options](#) for more information), 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.

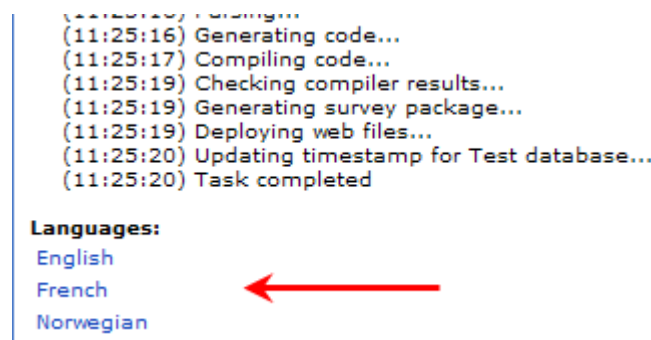


Figure 459 Example of the links resulting from the launch task

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.

Save

Popup Wizard

A script similar to the one displayed below must be included on the Web page where you want to trigger the pop-up. Follow this procedure:

1. Tweak the parameters until you are pleased with the appearance of the preview window and save them for future reference.
2. Add the below script to the HTML source of the triggering page.

Note: The scrollbar property of the preview window cannot be set dynamically. Because of this, changes to the scrollbar property will not take effect until the next time you test your pop-up.

Parameters

Window appearance
 Width: Height: Scrollbars: ☒

Display frequency
 Display pop-up to every st visitor to the webpage.

Cookie
 Name: , expires in months.

Script

```
<script><!--
if (document.cookie.indexOf("FIRMP0201785=true")==-1)
{
  var win = window.open("http://survey.testlab.firmglobal.net/wix/p0201785.aspx", "", "height=350,width=810,scrollbars=yes");
  if(win)
  {
    document.cookie.value = "FIRMP0201785=true;path=/;Expires=Fri, 10 Apr 2009 23:00:00 UTC";
  }
}
//--></script>
```

Figure 460 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 the An Example of a Script for Pop-up Surveys section on page 360 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 move away from it; you must re-launch the survey in the Test mode to re-open the wizard.

15.1.3.3.2. 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 project 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, borders are draggable.
- **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.

15.1.3.4. 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.

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 login. 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 login 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:
 - o id – Confirmit user id
 - o ts - UTC timestamp of the form “2007-01-10 23:39:39”
 - o 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/ss0.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.

15.1.3.5. 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 'survey.confirmit.com' or 'survey.euro.confirmit.com'. 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 set up a domain that points to the US site, create a record that points to the IP address **72.3.137.178**.
- To set up a domain that points to the Euro site, create a record that points to the IP address **212.100.250.8**.

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 project, this can be set on the project 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 SSL certificate does not match the domain name if they visit a secure link with a custom domain name. As the SSL 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.

15.1.3.6. 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 On-Demand environment, or <somename>@euro.confirmit.com for our EURO On-Demand 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.

15.1.4. 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 a User Guide for this functionality is available. Refer to this guide 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 project 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 the Permissions section on page 139 for more information).

Figure 461 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.

15.1.5. 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 (see the The Survey Channels Tab section on page 355 for more information), then the properties on the CATI Options tab become active.

Note: When you launch a project 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 the Permissions section on page 139 for more information).

Figure 462 The Survey Settings > CATI Options tab

The options in this tab are as follows:

- **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 center that will be using the survey. The options are:

- o **Manual** - the interviewer is allocated a telephone number by the CATI system, and manually dials the number on his/her telephone.
- o **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.
- o **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.
- o **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 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.
- **Enable whole interview recording** - check this box to record the entire interview as a file. This will allow the interview to be re-run at a later date, for example to check/confirm the details, investigate problems etc.
- **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:
 - o 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.
 - o 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.

(see the CATI section on page 482 for more information).

15.1.6. The Layout Tab

Use the options in the Layout tab to choose the look and feel of the survey.

Active Database Production

Overall options

Survey Layout to use: Public Survey Layout - A1 - Green and OI Type first letter(s) to filter

☒ Include progress bar

☐ Reserve a fixed area for validation error messages on every page of interview

☐ Enable Sliders, Grid bars, and Drag-n-Drop Ranking on touch devices ?

Accessibility options

☐ Generate 'Error: '-prefix for error messages

Button options

☐ Customize navigation buttons

☐ Global button images

Click options

☐ Answer buttons

☐ Cell-area click for grid

☐ Label click for single and multi (select by clicking answer text)

☐ Auto-next (proceed to next page automatically when possible)

☐ Press enter to move to next field (simulate tab when pressing enter key)

☐ Highlight cells in grid that fail "Answer required" checks

Figure 463 The Survey Settings > Layout tab options

15.1.6.1. The Layout Tab Properties

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/>

Panelist Template to Use

Visible when the project 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.

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.

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.

Enable Sliders, Grid Bars and Drag-n-Drop Ranking

Advanced WI features involving drag-n-drop do not work optimally on touch devices, so by default, questions using such capabilities will fall back to normal rendering on such devices. However, for Sliders and Drag-n-Drop Ranking questions it is still possible for the respondent to respond without dragging the slider/items to rank. If you wish to allow respondents to be able to use these features on touch devices despite drag-n-drop not working, select "Enable Sliders, Grid bars, and Drag-n-Drop Ranking on touch devices".

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.

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.

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 The Advanced WI Features Tab section on page 189 for more information).

1. Check the box to open additional input fields as shown below.

☒ Global button images

Image URLs	
	Radiobuttons
Default	
MouseOver	
Selected	
Width	
Height	

Figure 464 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;

- o **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.
- o **MouseOver** - the image that will be displayed when the respondent moves the mouse pointer over the area of the image.
- o **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 the File Library section on page 115 for more information).

4. Specify the width and height, in pixels, with which the images are to be displayed.
5. Save the changes.

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 the Visual Components for Question Skins section on page 69 for more information).

Cell – area Click for Grid

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), in grids and 3D-grids. 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 *Grid color* attribute. However when the respondent selects an option, the color of the selected cell can be changed so that the selected option is clearly visible.

	A	B	C	D	E	F	G
1							
2							
3							
4							
5							

Figure 465 The selected cells can be given a color so they are easily distinguishable

To set the color for the selected cells:

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, and on the General tab check which style has been specified for the Answer Label Style property (if any).
3. Select a different style or specify one as necessary, then save any changes.
4. Right-click on the selected Answer Label Style and select **Edit this HTML Style**, or in the Questionnaire Tree expand the HTML Styles folder, find the style that has been specified in points 2/3 above, and double-click on it to open its Properties page.
5. Go to the Edges tab, expand the **Borders** item, and under there expand the **Left** item.
6. Select the color you wish to use for the selected cells, set **Style** to **None**, and set **Width** to **1px**.
7. Save the property changes, then save the changes to the Question Skin.

You can view the effects of your changes by clicking the Preview tab in the Page Editor.

If the *Button images* feature has been set for the question, when the respondent clicks in the cell-area this will cause the selected image to open.

Note: If the *Button Images* property has been globally defined (on the Generate WI page), then in the Questionnaire for the grid questions you must select *No Images* for the Button Images property if you want the cell area to be marked instead of showing the images.

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.

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.

Note: A grid is a collection of single questions, and the feature will therefore also be active for grid questions.

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.

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 the How to Highlight Error Cells section on page 214 for more information).

15.1.7. 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.

Save Save and Use as Default Settings Use system default survey settings

General Options Survey Channels Web Options CAPI/Kiosk Options CATI Options Layout Validation & XSS

Active Database **Production**

Default validations

- ☒ Answer required checks: Answers are required for Singles/Open texts/Numerics/Grids
- ☒ Exclusivity tests: Disallow other answers when SINGLE answer has been selected in a Multi
- ☒ Other-Specify checking: Check that BOTH checkbox and textbox have been completed for an Other-specify answer
- ☒ Rank order tests: Check that ranking questions have all necessary answers without duplicates

XSS - Cross-site scripting

- ☒ Html encode output of piping expressions
- ☒ Require all open text input to be XSS safe

Figure 466 The Survey Settings > Validation & XSS tab options

15.1.7.0.1. 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 has answered the exclusive answer alternative defined as single punch in a Multi question, without checking additional answer alternatives in a list.

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 the Question Properties section on page 183 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 >.

15.1.8. 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.

You can specify if you want to use your personal survey settings (user template) on the project wizard page when you are creating the project.

The Survey Settings Template page contains the same tabs and properties as the "standard" Survey Settings page inside a project. Note that if a project is based on a project template then no survey settings template is applied.

The settings in a survey settings template are applied to a project when the project is first created. The template is not linked to the project, so once the project exists, the template settings can be changed and the project 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 the Survey Settings section on page 353 for more information).
 3. Save the changes.

15.2. Generating the Response Databases - Launching

When you have finished constructing your questionnaire 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 questionnaire, 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.

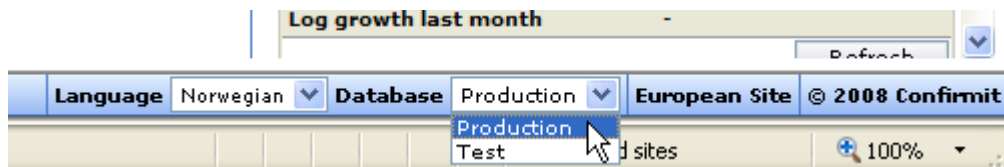


Figure 467 The global database switch

1. To generate the databases for a project, go to the **Designer > Launch Survey** menu command. The options page opens.

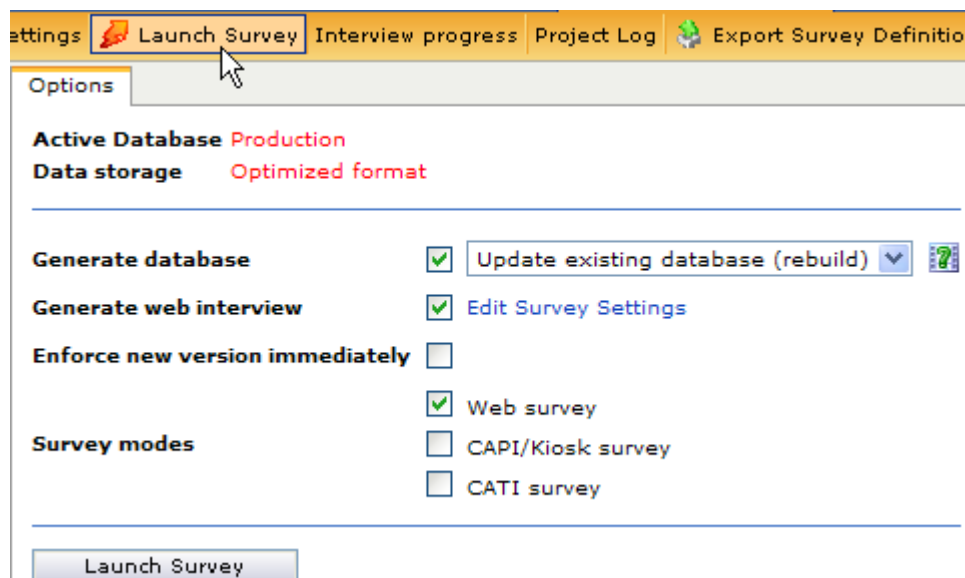


Figure 468 Launching a survey

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.

Note: In the event you are creating a CATI interview (refer to the CATI User Guide 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 type of database selected (in this case the Optimized 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 the Enabling External Test Access section on page 375 for more information).

2. Select whether you wish to generate the database and/or the web interview files.
3. If you select to generate the database, click the down-arrow beside the field to open a drop-down list of the generation options available, and select the desired option (see the figure below).

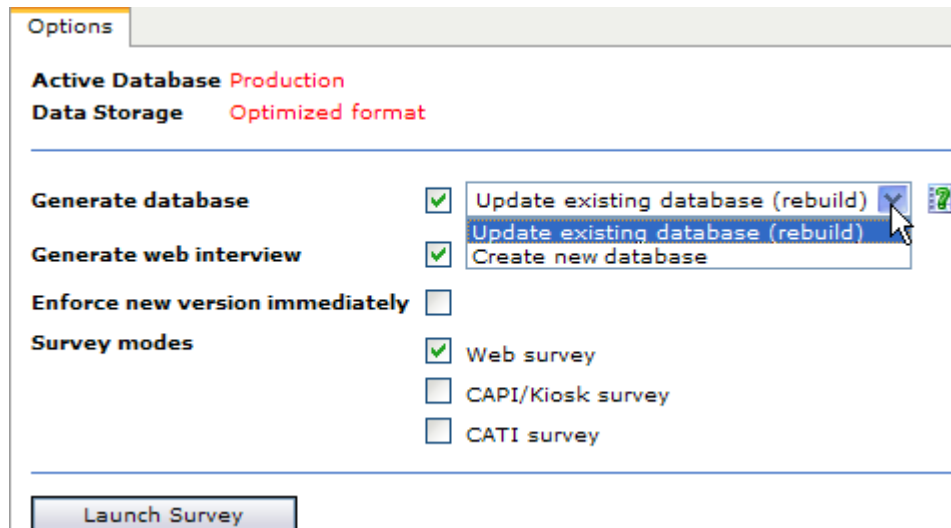


Figure 469 The database compilation drop-down

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 projects after a system upgrade, after some bug fixing has been carried out, or if new languages have been added to the project.
- **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.
- **Create new database (optimized format)** - this option is only available for projects 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.

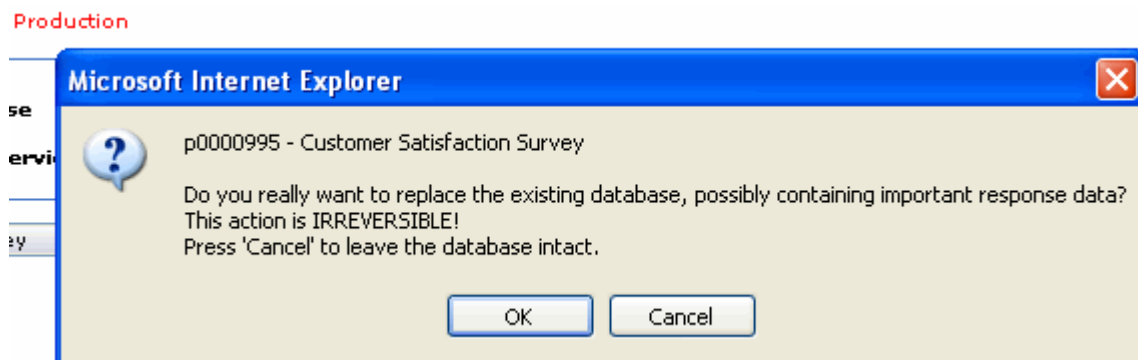


Figure 470 The Create New Database warning message

Important
 For projects 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 projects 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: 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 the Overwriting Running Interviews section on page 379 for more information).
5. Select the survey mode(s) you wish to use.
6. Click **Launch Survey** to start the task.

Note: When you launch a project 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 Project" permission for that survey (see the Permissions section on page 139 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 questionnaire.

During compilation and WI generation, the system performs some checks to ensure the integrity of the questionnaire. 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.

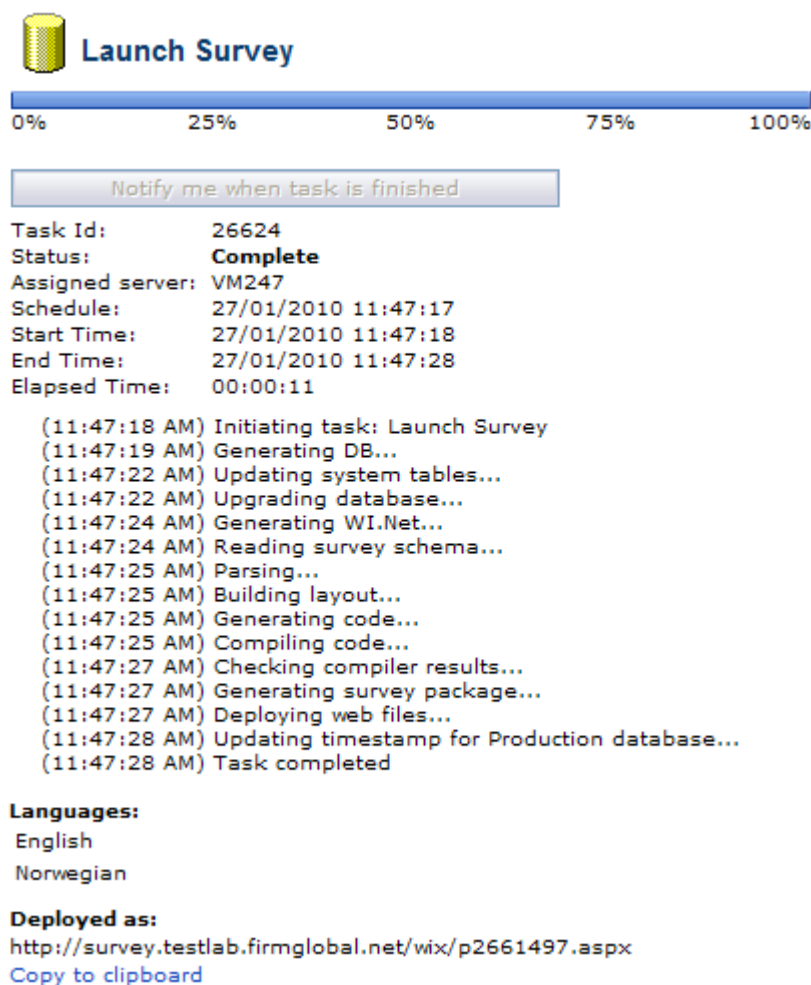


Figure 471 Example of the Launch Survey page on completion of the task

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 the Answers section on page 174 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 the Answers section on page 174 for more information).
- if the codes in Answers (Single, Multi, Grid) and Scales (Grid) are not unique. In legacy projects where the Code check functionality is disabled (a setting in the **Project Management > Overview** page, which is available only to software administrators) the generation task will be completed with a warning about non-unique codes.
- if any reserved keywords are used as question IDs (see the APPENDIX C: RESERVED KEYWORDS section on page 615 for more information).

The check will also control if the questionnaire has any questions with empty answers or illegal properties (see the Quality Control section on page 339 for more information).

In the majority of cases you should only update the database. This applies especially when you have made changes in a running project. 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.

On-Demand only:
To avoid filling storage space unnecessarily, Confirmit does not guarantee that test databases are saved on the server for more than two weeks.

15.2.1. Points to Note when Updating an Existing Database

After inserting a question into the questionnaire or moving a question within the questionnaire:

In 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.

15.2.2. 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 have obtained an SSL secure certificate on your server and choose to run the survey from a secure site. (pXXXXXXXX is the project 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.

15.2.3. 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.

Options

Active Database **Test**

Data Storage **Optimized format**

Generate database ☒ Update existing database (rebuild) ▼ ?

Generate web interview ☒ Edit Survey Settings

Enforce new version immediately ☐

Enable external test ☐ ←

Survey modes

- ☒ Web survey
- ☐ CAPI/Kiosk survey
- ☐ CATI survey

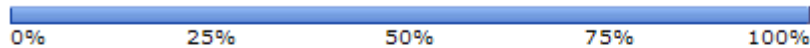
Launch Survey

Figure 472 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.



Launch Survey



Notify me when task is finished

Task Id: 26647
 Status: **Complete**
 Assigned server: VM246
 Schedule: 27/01/2010 15:02:25
 Start Time: 27/01/2010 15:02:27
 End Time: 27/01/2010 15:02:56
 Elapsed Time: 00:00:29

(3:02:27 PM) Initiating task: Launch Survey
 (3:02:29 PM) Generating DB...
 (3:02:36 PM) Updating system tables...
 (3:02:36 PM) Upgrading database...
 (3:02:39 PM) Generating WI.Net...
 (3:02:42 PM) Reading survey schema...
 (3:02:47 PM) Parsing...
 (3:02:47 PM) Building layout...
 (3:02:47 PM) Generating code...
 (3:02:47 PM) Compiling code...
 (3:02:50 PM) Checking compiler results...
 (3:02:50 PM) Generating survey package...
 (3:02:50 PM) Deploying web files...
 (3:02:56 PM) Updating timestamp for Test database...
 (3:02:56 PM) Task completed

Languages:

English

Norwegian

External test URL: http://survey.testlab.firmglobal.net/wix/test_p2661497.aspx?__etk=WMJXAVIGYCRB

Figure 473 Example of the link on the task log

The external test link is also displayed on the Project Overview page (see the The General Tab section on page 128 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 50. 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.

15.2.4. 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 project the error is located.

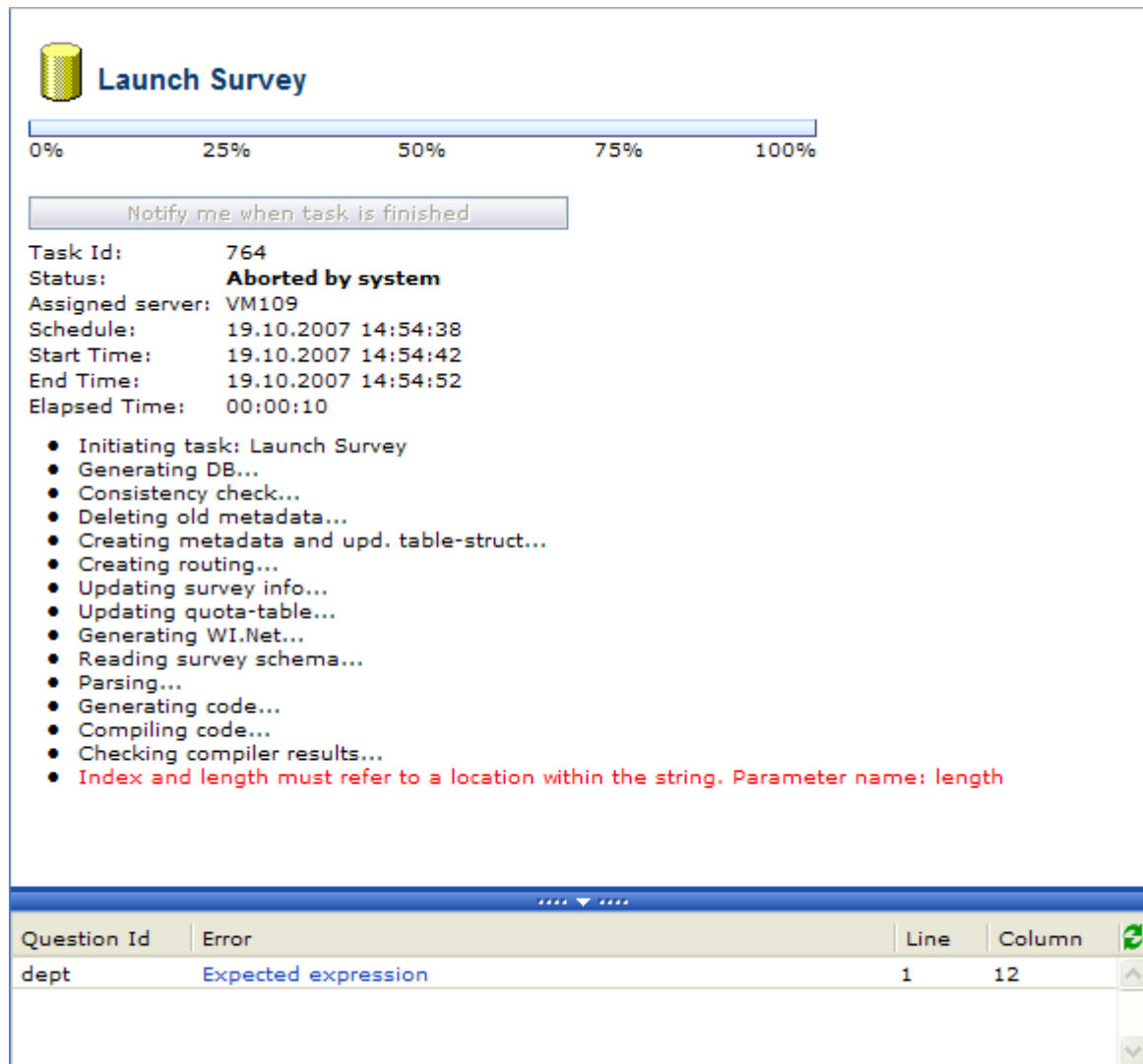


Figure 474 Example of a script error frame with an error link

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.

15.3. 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 the Overwriting Running Interviews section on page 379 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 The Version Comparison Tool section on page 378 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: On-Premise customers can set this value as they wish; refer to the Server Administrator Guide for details. For On-Demand customers, Confirmit reserves the right to reduce the number of survey versions saved in the event storage space becomes excessively congested.

15.3.1. 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). 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.

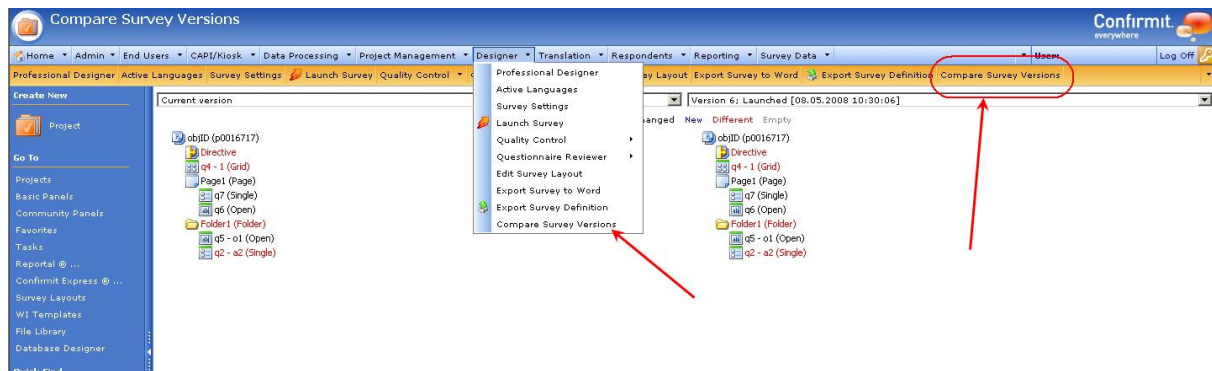


Figure 475 Example of the Survey Versions Comparison window

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 the XML Comparison section on page 378 for more information).

15.3.1.1. 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.

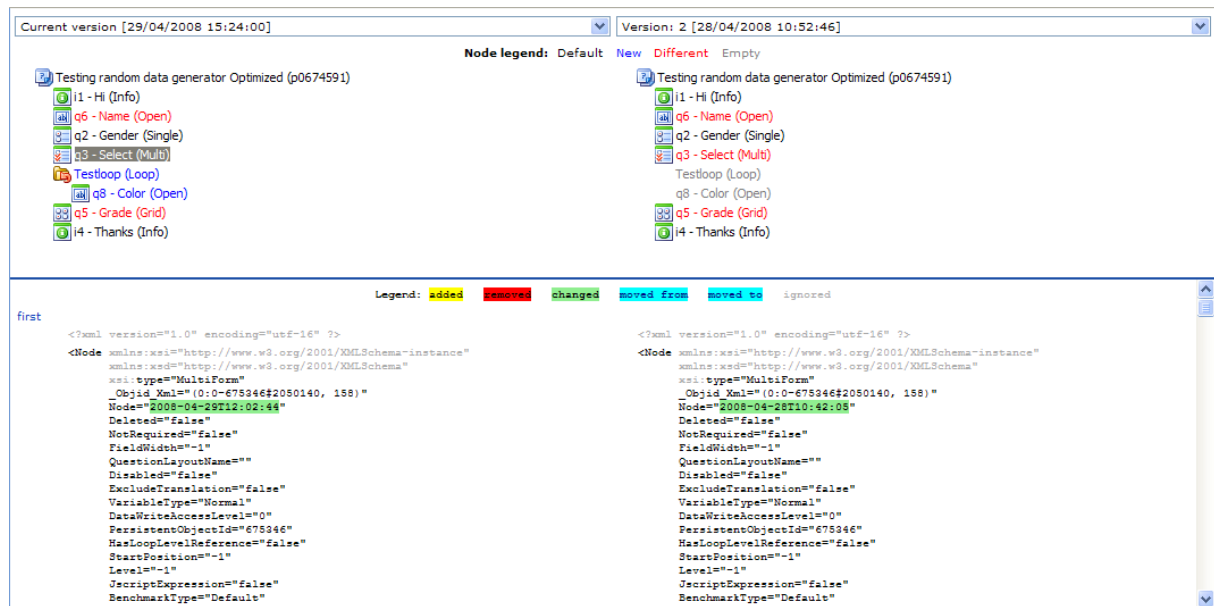


Figure 476 Example of the XML Comparison functionality

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.

15.3.2. 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.

15.4. 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.

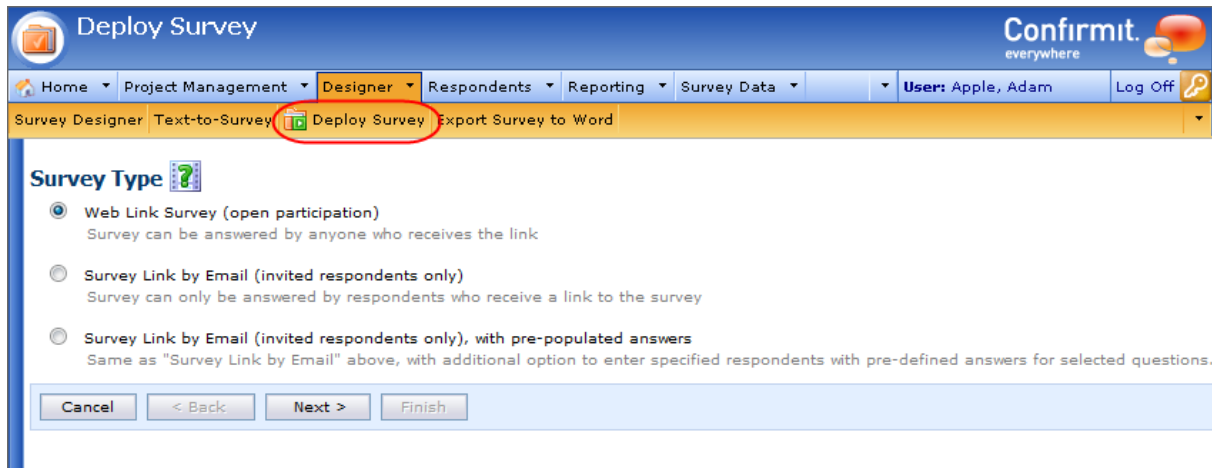


Figure 477 The Survey Type page

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 the Standard User - Survey Settings Page section on page 382 for more information).
- o If you have selected Survey Link by Email, the Respondent Tracking page opens (see the Respondent Tracking section on page 382 for more information).
- o If you have selected Survey Link by Email with pre-populated answers, the Questions page opens (see the The Questions Page section on page 380 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 the Sending Email as a Standard User section on page 417 for more information).

15.4.1. The Questions Page

If you have selected "Survey Link by Email with pre-populated answers", when you click **Next** the Questions page opens.

Select the questions you wish to pre-populate with answers. These questions will be hidden from the respondent.

Questions

Available Questions

- q17 - (Single answer (Radio buttons))
- name - Please enter your name - (Free text (Essay))
- age - Please select your age group - (Single answer (Drop down menu))
- ageNum - Please enter your age - (Numeric / Whole numbers)
- dob - Please select your date of birth - (Free text (Essay))
- qual3 - How important is automatic shift to you when buying a car? - (
- salary - Please type in your salary - (Numeric / Whole numbers)

Selected Questions

- gender - Please select your gender - (Single answer (Radio buttons))
- dept - Please select the Department you work for - (Single answer (Dn

>> <<

Cancel < Back Next > Finish

Figure 478 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.

Enter respondent email addresses (one per row), and corresponding answers for selected questions.

Add Row | Clear Row | Clear Column | Delete Row |

email	gender Please select your gender	dept Please select the Department you work for

gender" answer codes

1	[Set All]
2	[Set All]

answer codes

[Set All]
[Set All]
[Set All]
[Set All]

Here is a list of the valid answer-codes per question. Each list corresponds to a column in the grid. Click "Set All" to set a precode on all cells of a column. Close all tips on this page

Add Row | Clear Row | Clear Column | Delete Row |

Current items in grid: 2
Max items in grid: 100

☐ Allow duplicate email addresses

Cancel < Back Next > Finish

Figure 479 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.

15.4.2. Respondent Tracking

If you have selected one of the Survey Link by Email survey types, the Respondent Tracking page opens.

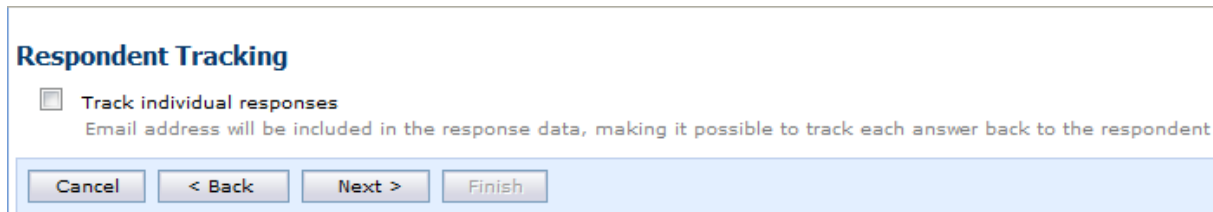


Figure 480 The Respondent Tracking page

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.

15.4.3. Standard User - Survey Settings Page

Having made any intermediate settings as necessary, on clicking **Next** the Survey Settings page opens.

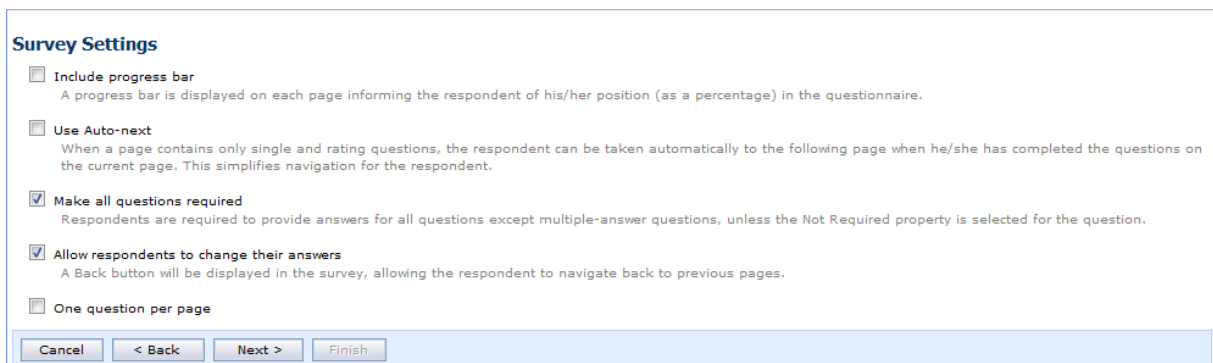
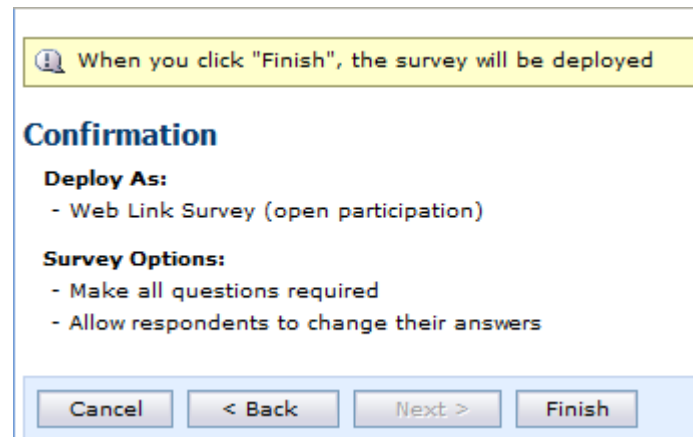


Figure 481 The Survey Settings page

1. Check / uncheck the boxes as required (see the Survey Settings section on page 353 for more information), then click **Next**.

The Confirmation page opens.



When you click "Finish", the survey will be deployed

Confirmation

Deploy As:

- Web Link Survey (open participation)

Survey Options:

- Make all questions required
- Allow respondents to change their answers

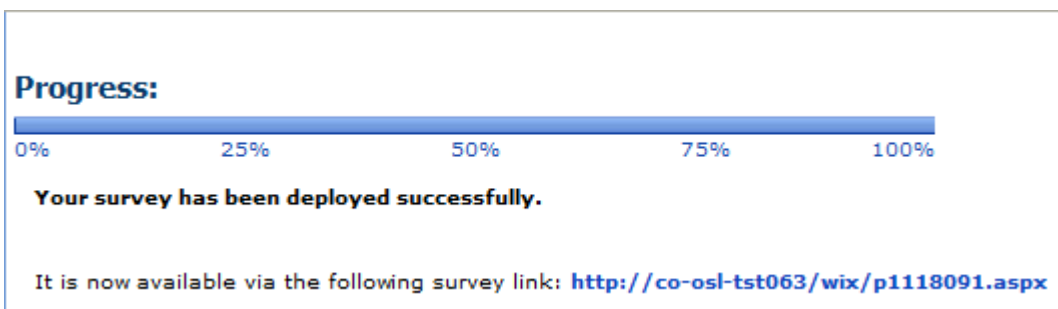
Buttons: Cancel, < Back, Next >, Finish

Figure 482 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.



Progress:

0% 25% 50% 75% 100%

Your survey has been deployed successfully.

It is now available via the following survey link: <http://co-osl-tst063/wix/p1118091.aspx>

Figure 483 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.

16. 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 **Project Management > Survey Settings** menu command (see the The Web Options Tab Properties section on page 356 for more information).

For targeted, non-public web interview surveys, you must prepare and upload a list of respondents. This chapter describes the steps needed to prepare the respondent list and upload it. 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 the Sending Email as a Standard User section on page 417 for more information).

16.1. 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 projects. 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 the Question Properties section on page 183 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. Texts exceeding this limit will be truncated.

16.1.1. 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 questionnaire routing and in reporting. To achieve this, you will have to include this information in the questionnaire 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 questionnaire 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 questionnaire 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 questionnaire is **Multi**.

For example, assume you have the following information about your respondents:

- o EmailDepartment (Administration, Marketing, Support, Sales)
- o 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
somebody@somewhere.com	adm	1	1	0	1
somebody@somewhere.com	mark	1	0	1	1
somebody@somewhere.com	supp	0	0	1	1
somebody@somewhere.com	sales	0	1	1	1
somebody@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 questionnaire routing and reporting, because the system will perform the linking between 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 the **APPENDIX C: RESERVED KEYWORDS** section on page 615 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. Generally therefore, background variables should be placed as early in the questionnaire as possible. However special care must be taken when creating surveys that include a StartBlock (see the **Blocks** section on page 216 for more information) if background variables are needed in the StartBlock. The background variables **MUST** then be placed at the beginning of the StartBlock such that they are passed first when the interview opens.

Note: For Optimized database projects 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.

16.2. 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 project's Production database. To do this:

1. Go to the **Respondents > Upload** menu command.
2. The Upload Settings dialog opens.

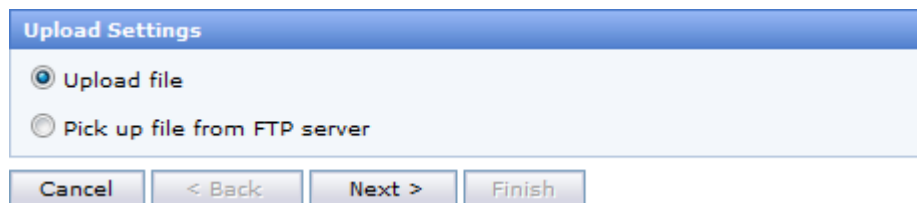


Figure 484 The Upload Settings dialog-1

Note: The FTP functionality is a chargeable add-on, and provides additional options (see the **Respondent Uploading with Access to Data Transfer Encryption and FTP** section on page 388 for more information). If your company has not licensed this add-on then the option will not be accessible.

3. Select whether you wish to upload the file or fetch it from the FTP server, then click **Next**.

The dialog changes to that shown below.

 Note! Column values longer than 255 characters will be automatically truncated upon upload to the survey.

Upload Settings

File to upload



Upload Mode

Append Data 

Key field

Check Duplicate Emails

☒

Duplicate Email Interval (days)

Validate Emails

☐

CATI Scheduling

Simple scheduling 

File encoding

ANSI

Start time

ASAP

Figure 485 The Upload Settings dialog-2

Note: The CATI Scheduling option only appears if the survey is CATI-enabled (see the CATI section on page 482 for more information).

4. Click **Browse**, then find and select the required respondent data file.

Note: The respondent list must be a Tab-delimited text document saved using the encoding format you select in this dialog.

5. Choose the required options, specify the start time for the job, and click **Finish**.

The options and data fields are as follows:

- **File to upload** - the file that is to be uploaded.
- **Upload Mode** - select the mode to be used when uploading the file. The options are:
 - o **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.
 - o **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.
 - o **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.
- **Check Duplicate Emails** - when selected, if the uploaded file 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 the rows that have not been uploaded will be sent to the user.
- **Duplicate Email Interval (days)** - becomes available when Check Duplicate Emails box is selected. If a value is specified, only emails for respondents created N days prior to the task scheduling will be used for de-duping. The option is only enabled if you launch a new survey or upgrade an existing one. This option allows you to control the frequency of survey invitations on a continuous survey, for example an event-driven survey towards your customer base. This can be used to prevent customers that have an interaction with you from receiving a new survey the next N days after the last.

- **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.
- **CATI Scheduling** - (only available if the survey is CATI-enabled) Respondent data being loaded into a CATI-enabled project 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.
 - 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.
- **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: The Check Duplicate Emails and Validate Emails functionality will only be applied if the file being uploaded contains an "email" column.

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 the Scheduling an Email for Later Execution section on page 563 for more information). This dialog enables you to set up the date and time for when you wish the upload to commence.

10. On completion, click **Upload...** to start uploading the respondent list to the Confirmit system.

Note: In the event you need to edit the respondent list after you have uploaded it, go to the Respondents > Edit menu command.

16.2.1. Respondent Uploading with Access to Data Transfer Encryption and FTP

Note: Data Transfer Encryption and FTP is an Add-On (see the Data Transfer Encryption and FTP section on page 4 for more information).

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. To upload the file from the FTP server:

1. Open the project and go to the **Respondents > Upload** menu command.
The Upload Respondents dialog opens as shown below.
2. Choose the **Pick up file from FTP server** option.

Figure 486 The Upload Respondents dialog

3. Click **Next**.

The Upload Settings dialog opens.

Figure 487 The Upload Settings dialog

4. Choose the required options, specify the start time for the job, and click **Finish**.

Confirmit will pick up the specified file, decrypt it using the user's private encryption key, and then upload the respondents into the specified project.

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 the Data Transfer Encryption and FTP section on page 4 for more information).

The options and data fields are as follows:

- **Project ID** - the ID of the project into which you are uploading the file.
- **File name** - the file that is to be uploaded. Note that the file name must start with the number of the project into which the file is to be uploaded.
- **Upload Mode** - select the mode to be used when uploading the file. The options are:
 - o **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.

- o **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.
- o **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.
- **Check Duplicate Emails** - when selected, if the uploaded file 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 the rows that have not been uploaded will be sent to the user.
- **Duplicate Email Interval (days)** - becomes available when Check Duplicate Emails box is selected. If a value is specified, only emails for respondents created N days prior to the task scheduling will be used for de-duping. The option is only enabled if you launch a new survey or upgrade an existing one. This option allows you to control the frequency of survey invitations on a continuous survey, for example an event-driven survey towards your customer base. This can be used to prevent customers that have an interaction with you from receiving a new survey the next N days after the last.
- **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.
- **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: The Check Duplicate Emails and Validate Emails functionality will only be applied if the file being uploaded contains an "email" column.

16.3. 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 the Email Delivery Report section on page 413 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.

16.3.1. 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 frame on the left displays all User Fields and all System Fields available in the currently selected survey. The upper-right frame holds action buttons, search fields and buttons, and fields for adjusting the number of displayed respondents per page. The lower-right frame is for displaying and editing respondent data. Select the columns to be displayed in the lower-right frame using the **Select Columns** button (see the Select Columns and Define a View section on page 393 for more information). You can resize the frames by dragging the internal borders. If you click on a variable in the lower-right frame, a pop-up window opens where you can change the value of the variable for all respondents in the current search result.

Click on a field to update ALL respondents satisfying the search criteria

Expression: No advanced expression.

Delete Search Export... Synchronize... Select a view ----- Select Columns... Advanced Expression... Clear

respid	name	email
6	Sara Jones	cp@firmglobal.com
7	Lise Niece	liepaniece@hotmail.com
8	Alexander Carpenter	C@firmglobal.com
9	James Bond	traning@confirmit.com
10	Jeffery Birch	consultng@confirmit.com
11	John Smith	smith@here.no
12	George Anderson	george@there.com
13	John Doe	manual@confirmit.com
14	Olivia Jones	manual@confirmit.com

Page 1

Save Delete

General

RespId 6

name Sara Jones

email cp@firmglobal.com

Figure 488 Example of the Respondent Data Editor

Note: The SMTP fields will be available when Email Delivery Report is activated (see the Email Delivery Report section on page 413 for more information).

The data fields and buttons shown in the example above are as follows:

- **User Fields**- for example, name, email, etc. - all variables/fields that are uploaded into the survey with the respondent list.
- **respid** - search field for respid. You can search for respondents by specifying the respid or a range of respids.

System Fields:

- **CapilInterviewerId** - 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 respondent's security ID. The security ID is a string consisting of 8 random upper case characters. This means that there are 26^8 (more than 200 billion) possible combinations for the security ID.
- **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** - timestamp for the last SmtStatus.
- **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 the Synchronization section on page 401 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 the Select Columns and Define a View section on page 393 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 The Advanced Expression Window section on page 392 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.

16.3.1.1. The Advanced Expression Window

The Advanced Expression window enables 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.

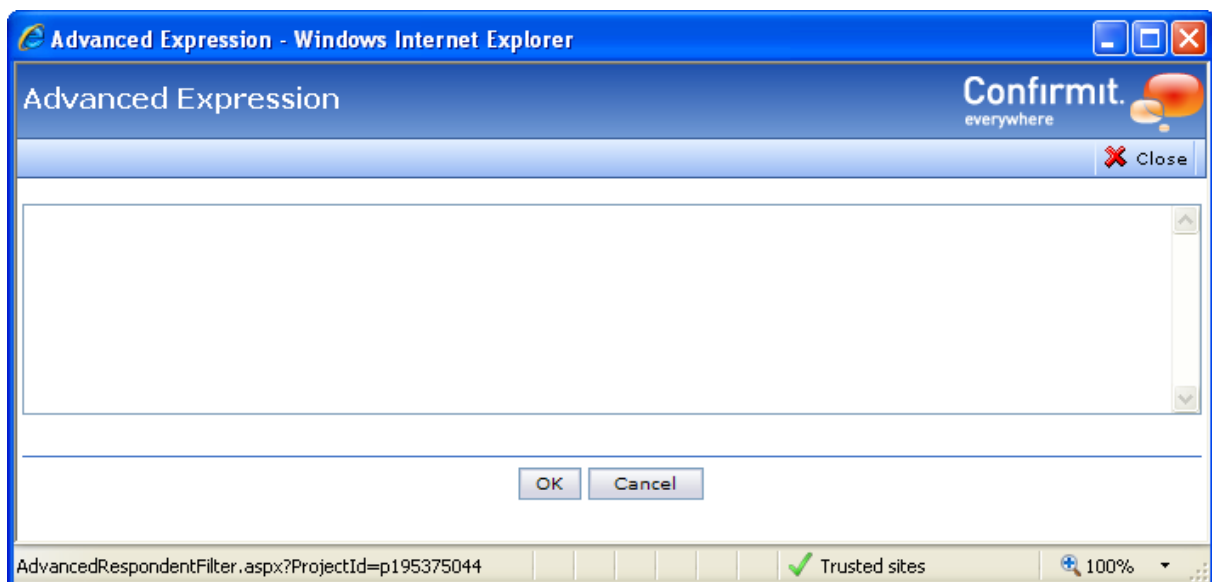


Figure 489 The Advanced Expression window

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%'
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

Desired result	Example of code
	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)

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)

16.3.2. Select Columns and Define a View

When you enter the Respondent Data Editor for a project 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 check-box 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 check-box.

Select Columns
Select from the available items below

Confirmit. everywhere

Close

Select action on views
Update Default ▼

Find
Find what Find
☐ Match case
☐ Match whole words only

Available items

- ☐
- ☐ CapiInterviewerId
- ☐ email
- ☐ LastUpdated
- ☐ name
- ☐ noOfEmailsSent
- ☐ OptOut
- ☐ OptOutDate
- ☐ sid
- ☐ smtpcode
- ☐ smtpstatus
- ☐ smtpStatusDate
- ☐ smtpTaskId
- ☐ Survey link
- ☐ tries
- ☐ userid

Selected items

>> <<

OK Cancel

Figure 490 Selecting Available items

If the list of Available items is very long, you can search for items using the “Find what” field.

- 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.

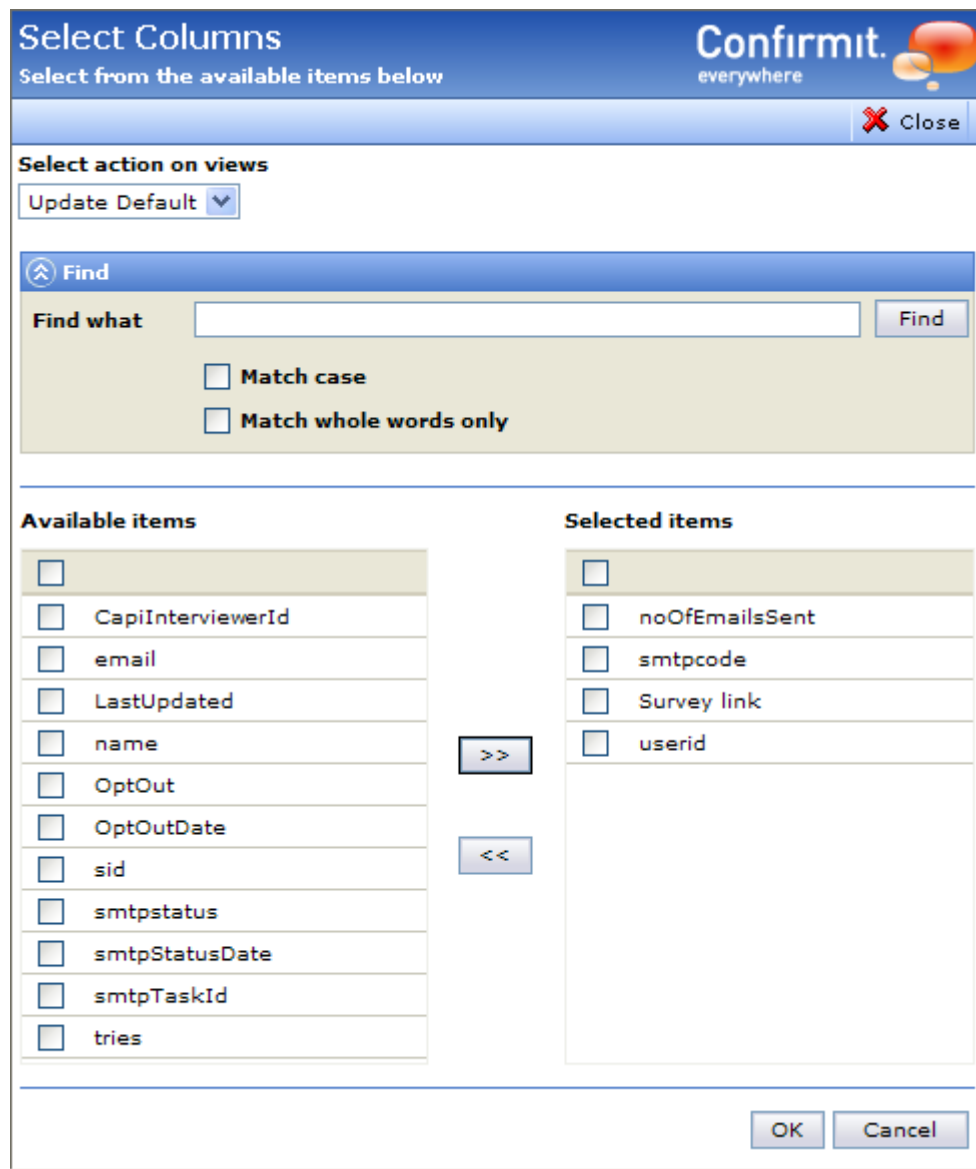


Figure 491 Some fields selected

All the fields selected will appear as search fields in the main Respondent editor window.

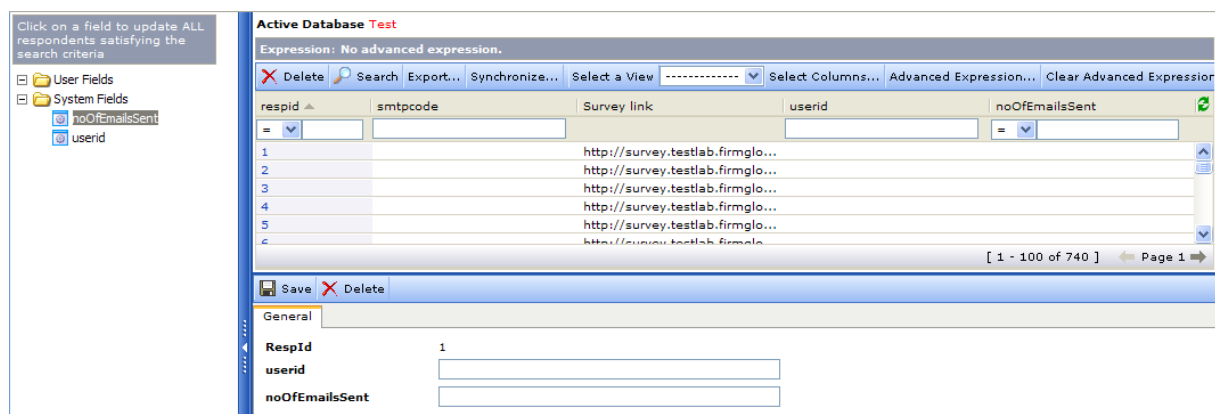


Figure 492 The selected columns shown in the main window

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**.

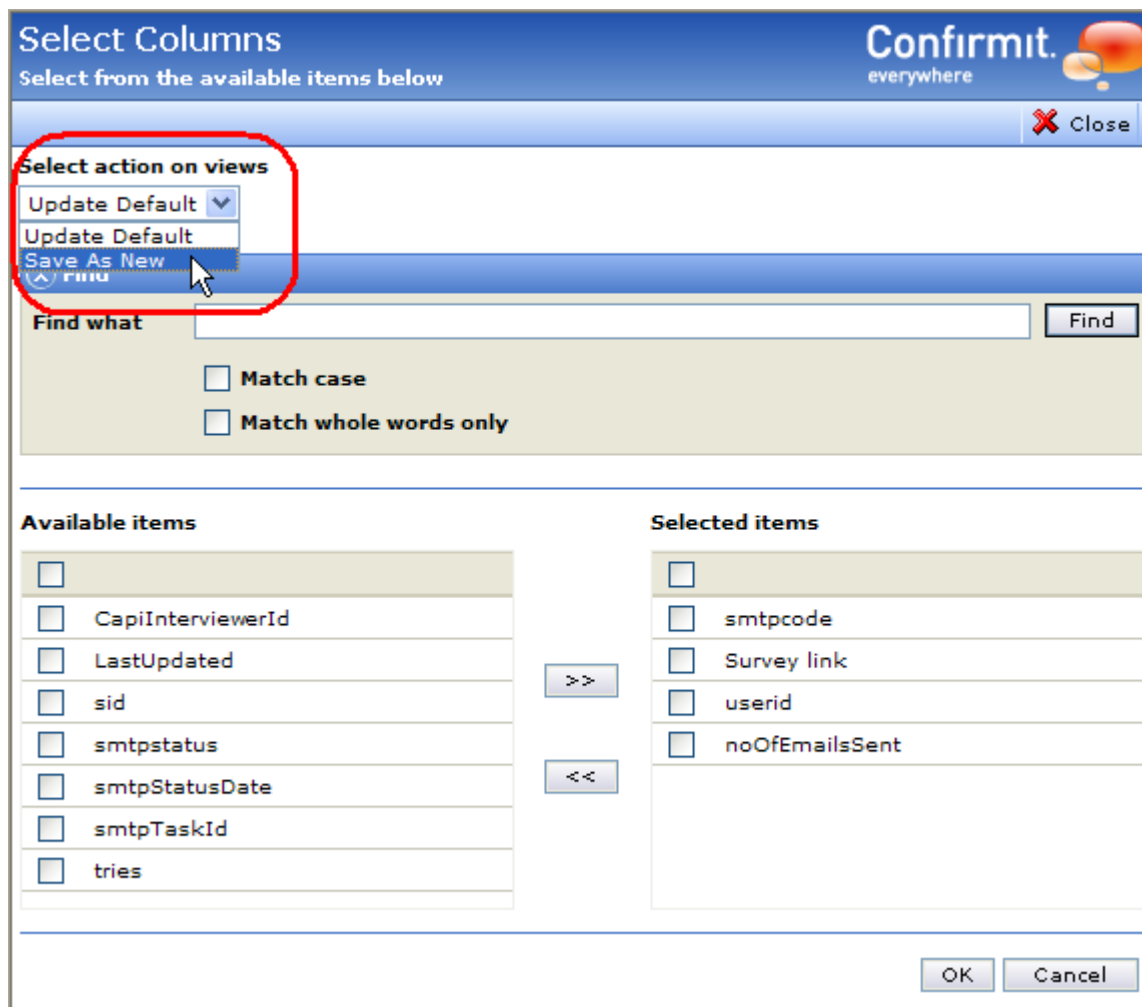


Figure 493 Saving a new View

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.

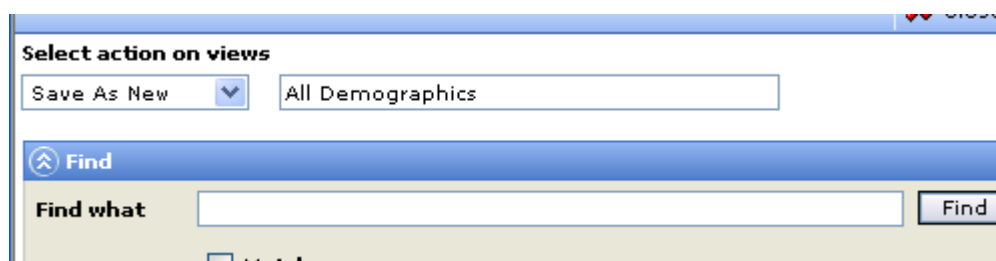


Figure 494 Naming the View

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.

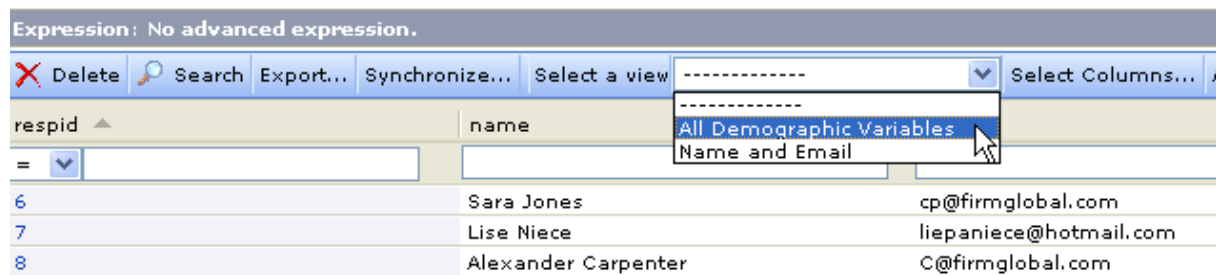


Figure 495 Example of the Select a View drop-down

16.3.3. 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 The Advanced Expression Window section on page 392 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).

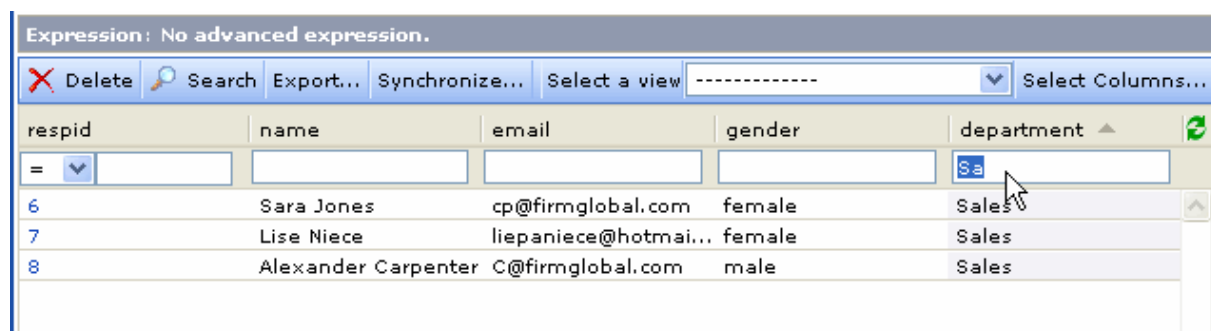


Figure 496 Conducting a Search

You can sort the respondents by clicking on the column/search field headings.

16.3.3.1. 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 497 Example of the Export Properties window

The properties and options are as follows:

- **Project Id** - the identification number of the project you are currently working on.
- **Email recipient** – this is the email address (default the current user) to which the status 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.
- **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.
- **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 check-box to open the file name text-box, where you can edit the system-generated name.
- **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.

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 the Data Transfer Encryption and FTP section on page 4 for more information).

16.3.4. 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.

Expression: No advanced expression.

Buttons: Delete, Search, Export..., Synchronize..., Select a view, Select Columns...

respid	name	email	gender	department
6	Sara Jones	cp@firmglobal.com	female	Sales
7	Lise Niece	liepaniece@hotmail...	female	Sales
8	Alexander Carpenter	C@firmglobal.com	male	Sales

Page 1

Buttons: Save, Delete

General

RespId: 6

name: Sara Jones

email: cp@firmglobal.com

gender: female

department: Sales

Figure 498 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 projects:

For CATI-enabled projects, 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.

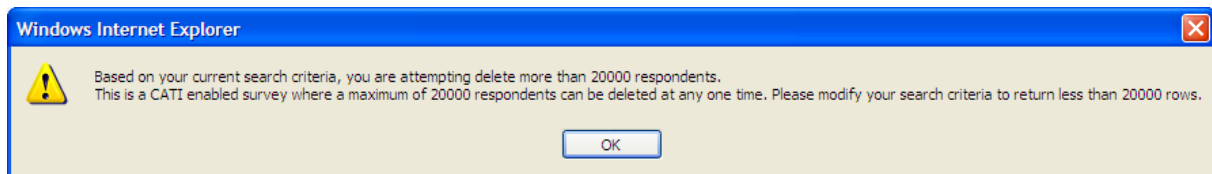


Figure 499 Warning message for attempted excess deletion

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.

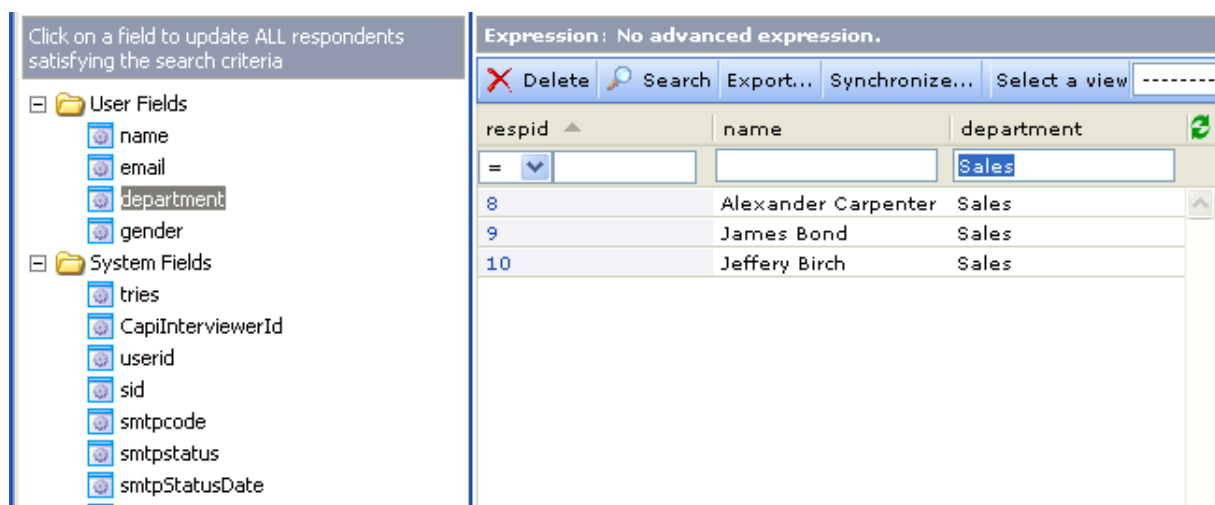


Figure 500 Updating Sets of Respondent Data - 1

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 501 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."

16.3.5. 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 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.

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.

Synchronization properties

Project ID p0000995

Project Name Customer Satisfaction Survey

Database prod

Update existing response data ☐

Append missing response data ☒

Comment

Start time ASAP

OK

Figure 502 The Synchronization properties window

Check the **Update** box then click **OK** 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** box then click **OK** to add respondents resulting from the search, which are not in the response data, and insert data for those background variables.

16.4. 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.

16.4.1. 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 the Invitation and Reminder Email section on page 224 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 project 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 as shown in the example below. Here you define which respondents are to be sent emails, how many emails are to be sent in a batch etc.

Figure 503 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.

16.4.1.1. 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.

- o You set Max number of records to 10,000
- o You set NumberOfEmailsSent to =0
- o 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.

- **Respondent status** – Chooses respondents based on the status of the interview, see below.
 - o **No selection** – All respondents will receive the email.
 - o **Not answered** – All respondents who have not yet entered the survey.
 - o **Complete** – All respondents who have completed the survey. (Useful for sending “Thank you” e-mails).
 - o **Incomplete** – All respondents who have started answering the survey, but have not yet completed it.
 - o **Screened** – All respondents who have the “Screened” status (see the Stop-Nodes section on page 202 for more information).
 - o **Quota full** – All respondents who have been stopped due to a full quota (see the Stop-Nodes section on page 202 for more information)
 - o **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:

Assume that the respondent data includes gender as a background variable with codes ‘M’ and ‘F’ for male and female respondents, respectively. The e-mail wizard would then list *gender* as one of the available selection criteria. To select only male respondents one would enter

```
= 'M'
```

in the *gender* input field. Selecting based on a set of values would be done with the *IN* keyword. Selecting both male and female respondents (for the example’s sake) is done with the criteria

```
IN ('M' , 'F')
```

in the *gender* input field. Selecting respondent that have already received more than 2 e-mails could be accomplished by entering

```
> 2
```

in the *noOfEmailsSent* input field. Similarly, all standard SQL keywords and operators can be used, such as *BETWEEN*, *<*, *<=*, *>*, *>=*, *<>*, *AND*, *OR*, *LIKE* etc. For instance, to find all respondents whose names start with ‘B’ (assuming the respondent list includes name as a background variable):

```
LIKE 'B%'
```

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.

16.4.1.2. Fixed Sender Domain and Email Delivery Report Functionality

All Confirmit On-Demand 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 the Email Delivery Report section on page 413 for more information).

This means that if you are working in the On-Demand 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 On-Demand 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.

16.4.1.3. 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' e-mail address, write:

```
^email^
```

referring to the uploaded email column (must be written exactly as the column label).

It is possible to display the link to the survey within the e-mail text by simply referring to it as follows:

```
^slink^
```

or

```
^seclink^
```

for secure links

Ensure that ^slink^ and ^seclink^ are not used as background data. The references ^slink^ and ^seclink^ should always be written on a separate line in order to avoid breaking the link over two lines.

Note: On-Premise Customers must obtain and install an SSL Secure Certificate on their servers to enable the ^seclink^ option.

16.4.1.4. 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.

16.4.2. 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 project, 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 504 The Create Email page

Note that HTML and Plain Text email text fields are presented for each language selected for the project, so you can send the email in the various project languages.

Note: Any emails you set up directly here in the Emailing Wizard and save, will be saved in the project 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.

16.4.2.1. 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).
- **Use HTTPS** – the URLs will use https:// for secure links instead of http://.

Note: On-Premise Customers must obtain and install an SSL Secure Certificate on their servers to enable this option. This option will be activated after you have chosen the Include link option.

- **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 project 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 the Fixed Sender Domain and Email Delivery Report Functionality section on page 405 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.

- **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**. 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^

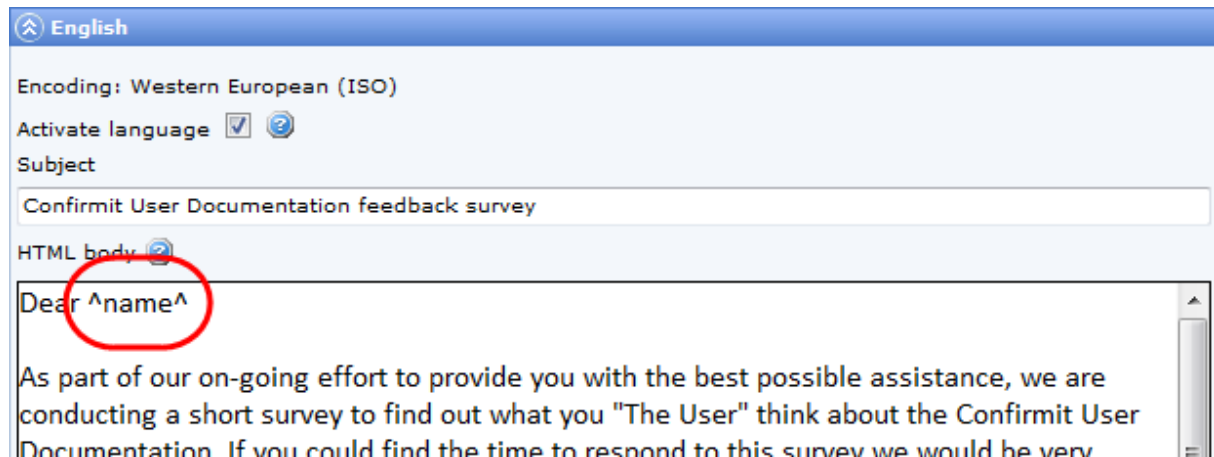
These headers will be added after the internal Confirmit headers. Note that you cannot use the X-Confirmit prefix in custom headers.

- **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 the Handling Respondents in Limited Surveys section on page 384 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.

16.4.2.2. 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.



English

Encoding: Western European (ISO)

Activate language ☒ 

Subject

Confirmit User Documentation feedback survey

HTML body 

Dear ^name^

As part of our on-going effort to provide you with the best possible assistance, we are conducting a short survey to find out what you "The User" think about the Confirmit User Documentation. If you could find the time to respond to this survey we would be very

Figure 505 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.

16.4.3. 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.

Respondent list preview

#	noOfEmailsSent	userid	smtpstatus	name	email	password
1	0	doc	-	Adam Apple	documentation@confirmit.com	password
2	0	aa	-	Adam Avian	documentation@confirmit.com	password
3	0	bb	-	Belinda Brant	documentation@confirmit.com	password

Number of respondents who match selection criteria: 3

Number of active language(s): 1

Send confirmation mail: off

Include link: on

Secure link: off

Respondent status: Any

Send as Html: on

Send as plain text: on

Override recipient email: off

Send email FW: off

Disable number of emails sent: off

Email preview email 1 (respondent # 1), English

To: documentation@confirmit.com

From: Adam Apple<documentation@confirmit.com>

Reply to: Adam Apple<documentation@confirmit.com>

Subject: Car Survey email request

Body Html: Dear respondent

We would be most grateful if you could take the time to answer a few questions concerning your recent test-driving experiences.

http://survey.testlab.firmglobal.net/wx/p0201785.aspx?__sid__=KOV3FQhVznfiI4DwjnsoqTgUyCo6nxzCTdr3tsZGO-x0xDfd0URrkKJicN3s5n0

http://survey.testlab.firmglobal.net/wx/p0201785.aspx?__sid__=KOV3FQhVznfiI4DwjnsoqTgUyCo6nxzCTdr3tsZGO-x0xDfd0URrkKJicN3s5n0

Body Plain Text: Dear respondent. We would be most grateful if you could take the time to answer a few questions concerning your recent test-driving experiences. http://survey.testlab.firmglobal.net/wx/p0201785.aspx?__sid__=KOV3FQhVznfiI4DwjnsoqTgUyCo6nxzCTdr3tsZGO-x0xDfd0URrkKJicN3s5n0

Cancel

< Back

Next >

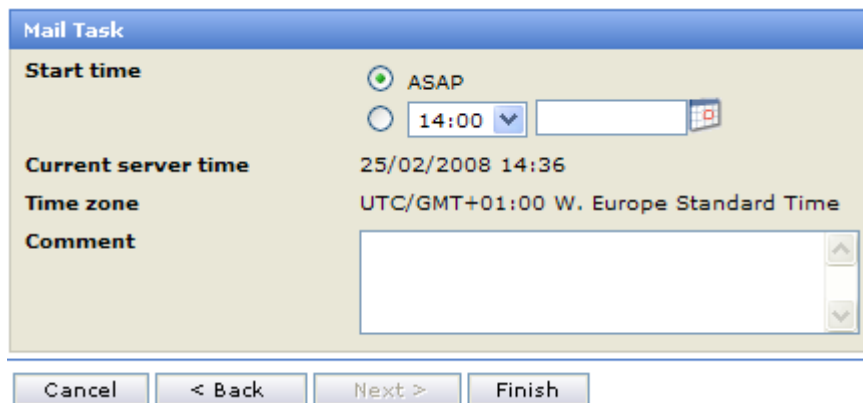
Finish

Figure 506 The Respondent and Email Preview page

1. Check the settings and the text(s) of the email.
The Preview will be shown in the project'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.

16.4.4. 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.



The 'Mail Task' dialog box has a blue title bar. It contains the following fields and controls:

- Start time:** A radio button is selected for 'ASAP'. Below it is a time selection field showing '14:00' with a dropdown arrow and a calendar icon.
- Current server time:** Displays '25/02/2008 14:36'.
- Time zone:** Displays 'UTC/GMT+01:00 W. Europe Standard Time'.
- Comment:** A large text area with a vertical scrollbar.
- Buttons:** 'Cancel', '< Back', 'Next >', and 'Finish' are located at the bottom.

Figure 507 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.

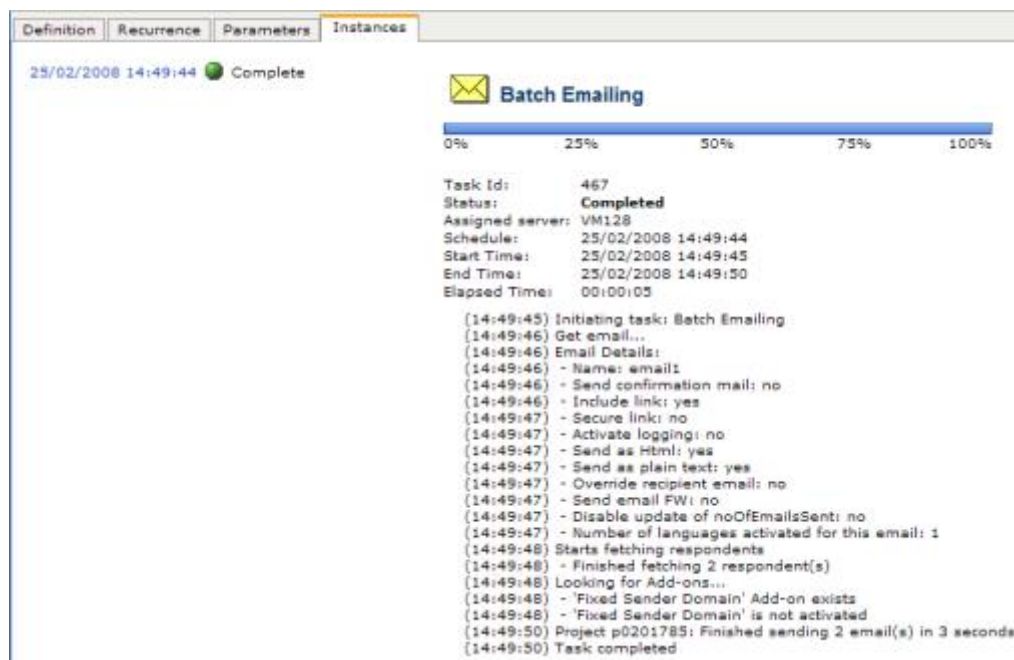


Figure 508 The Batch Emailing task Instances tab

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.

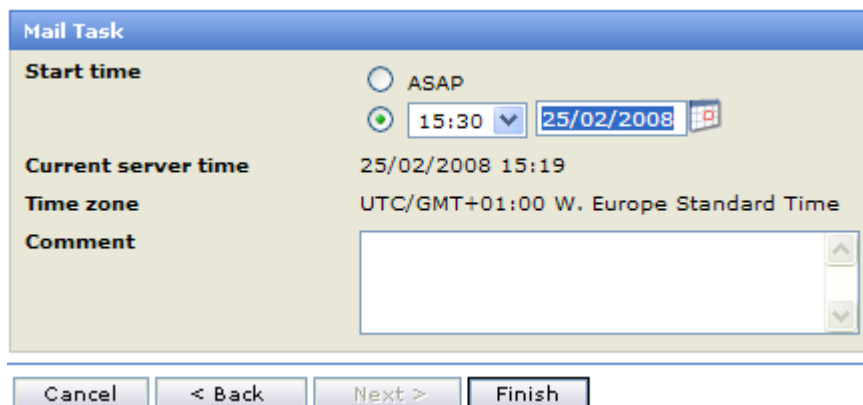
16.4.5. Setting up Recurring Batch Emailing Tasks

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**.

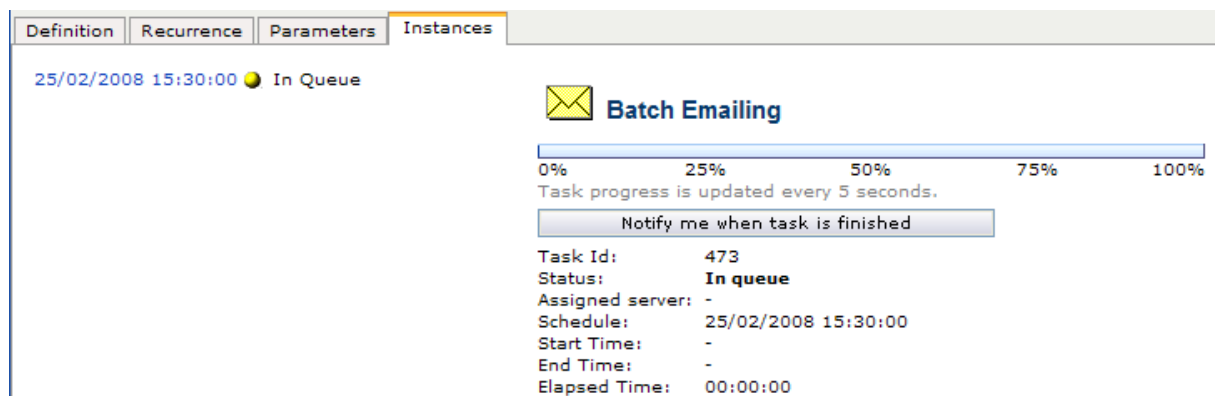


The 'Mail Task' dialog box has a blue title bar. It contains the following fields and controls:

- Start time:** Two radio buttons, 'ASAP' (unselected) and a selected button with a dropdown showing '15:30' and a date field showing '25/02/2008' with a calendar icon.
- Current server time:** A text field displaying '25/02/2008 15:19'.
- Time zone:** A text field displaying 'UTC/GMT+01:00 W. Europe Standard Time'.
- Comment:** A large text area with up and down arrow buttons on the right side.
- Buttons:** 'Cancel', '< Back', 'Next >', and 'Finish'.

Figure 509 Setting up the recurring Mail task

The Batch Emailing page opens at the Instances tab.



The 'Batch Emailing' page has four tabs: 'Definition', 'Recurrence', 'Parameters', and 'Instances' (which is active). The 'Instances' tab shows a task entry for '25/02/2008 15:30:00' with a yellow envelope icon and the text 'In Queue'.

Below the task entry is a progress bar for 'Batch Emailing' with a scale from 0% to 100% in 25% increments. Below the bar, it says 'Task progress is updated every 5 seconds.' and a button labeled 'Notify me when task is finished'.

Task details are listed below:

- Task Id: 473
- Status: **In queue**
- Assigned server: -
- Schedule: 25/02/2008 15:30:00
- Start Time: -
- End Time: -
- Elapsed Time: 00:00:00

5. Go to the **Recurrence** tab and click **Change**.
This opens the Recurrence property setup page.
6. Set the time and date when you wish the tasks to start.
7. Set **Recurring Task** to **Yes**, and select the required repetition rate.
8. Set an End date, after which the task will stop running.

Figure 510 The Recurrence Pattern for the job

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

The Recurrence tab changes to that shown below.

Figure 511 The Recurrence Parameters dialog

The tab now shows the dates and times of the scheduled recurrences. 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.

16.4.6. Email Delivery Report

All Confirmit On-Demand 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 On-Demand 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.

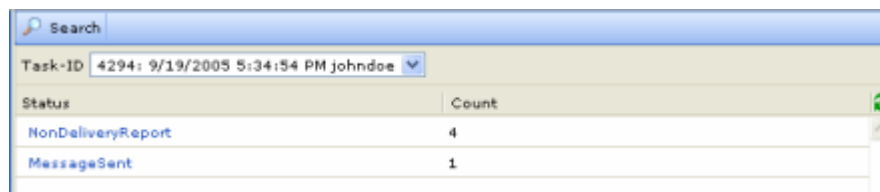
16.4.6.1. Tracking E-mail Status

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.



Status	Count
NonDeliveryReport	4
MessageSent	1

Figure 512 Email Delivery Overview

If you have sent invitations several times from the same project, 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:

- o **BadMail** – the SMTP server could not send the message because the email address is not valid.
 - o **Queued** – the email is in the sending server's out-going queue.
 - o **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.
 - o **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.
 - o **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.

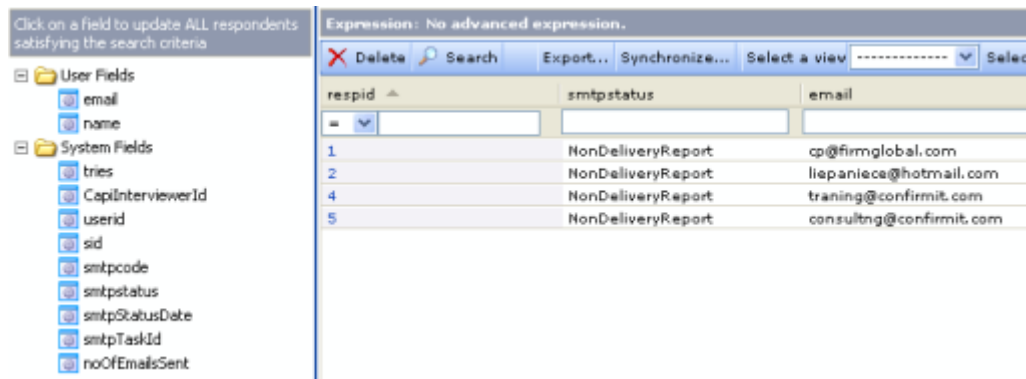


Figure 513 Respondent Editor

See the Respondent Data Editor section for further information.

16.4.6.2. Recurring Batch Emailing Tasks

Note: If you have Confirmit projects 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 projects you must deactivate the existing emailing tasks and set up new ones.

16.4.6.3. Using Your Own Domain on CONFIRMIT's Server: Technical Setup

For On-Demand 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. The table below lists the current IP-addresses at the US or Euro On-Demand sites that should be used for MX records. To allow for fail-over should one server become unavailable, it is recommended to add both IP-addresses as the domain MX records, with different priorities.

CONFIRMIT US On-Demand Site	CONFIRMIT Euro On-Demand Site
IP-address 1 : 72.3.137.170, Priority: 10	IP-address 1 : 83.138.165.68, Priority: 20
IP-address 2 : 72.3.137.171, Priority: 20	IP-address 2 : 212.100.250.11, Priority: 20
IP-address 3 : 72.3.137.172, Priority: 20	IP-address 3 : 83.138.165.69, Priority: 20
IP-address 4 : 72.3.137.175, Priority: 20	

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.

A full list of Confirmit IP addresses is now published and maintained on the Confirmit Extranet:

<http://extranet.confirmit.com/index.asp?s=53&m=5>

Log in, then go to the **System Admin > On Demand Operations** page.

Note: Contact CONFIRMIT Professional Services support@confirmit.com for help with enabling your own sender domain.

16.4.7. 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 Extranet - <http://extranet.confirmit.com/> (a login and password are required). 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 On-Demand clients, but the concepts presented herein also apply to On-Premise clients.

16.4.7.1. 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 On-Demand 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 On-Demand 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.

16.4.7.2. 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 On-Demand 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 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: 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.

16.5. Handling Respondents in Multilingual Projects

With multilingual projects 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.

16.5.1. 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 **I** (as in language) as the first question of the survey. You must then use the actual languages as answers, and the language codes (see Confirmit Language Codes) as codes.

The respondents will then be presented with subsequent questions in the language they have chosen in the Language question.

Note: As the respondents must make this selection manually, the question “I” 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 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.

16.5.2. 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 the Preparing the Respondent List section on page 384 for more information). The contents of the column must be Confirmit language codes (see the APPENDIX B: CONFIRMIT LANGUAGE CODES section on page 609 for more information).
- Include a Single question with the question ID **I** (lower-case letter L) in the survey, as mentioned in the previous section.
- In multilingual surveys with a login-page (see the The Web Options Tab Properties section on page 356 for more information) the respondents are presented with a drop-down where they can choose their desired language.

Note that 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.

16.6. 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.

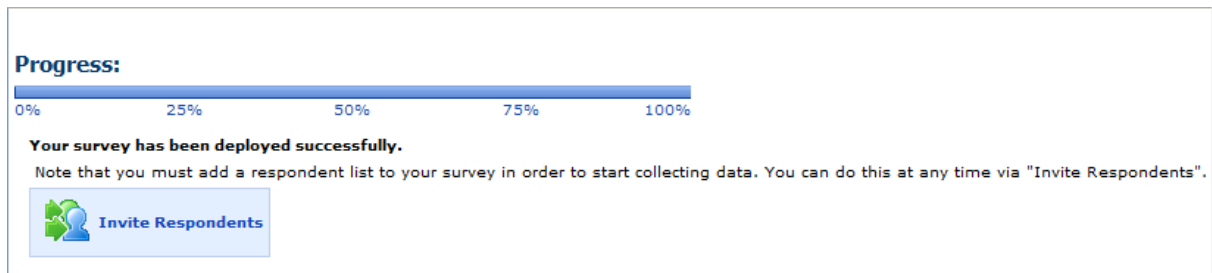


Figure 514 The survey is deployed and you now need to invite the respondents

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 .

The image shows the "Respondents" page. At the top, a yellow box contains instructions: "Enter all the email addresses into the box below, separated with the hard-return Enter key (one address per line). Each email address represents one respondent. Note that no emails will be sent before you confirm the email details. Click 'Next' to proceed to the Email Details." Below this, the heading "Respondents" is followed by the text "Number of new respondents which can be entered: 100". A large text input field is provided for entering email addresses. Below the field, a note says "Separate the email addresses with the [ENTER] key." and there is a checkbox labeled "Allow duplicate email addresses". At the bottom, there are four buttons: "Cancel", "< Back", "Next >", and "Finish".

Figure 515 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.

• Define the email settings, subject and body.
 • Click "Next" to see a full preview of the email.

Email Details

Sender address
documentation@mail.firmex.local

Reply to
documentation@confirmit.com

Display name
abcde

Email subject
Survey 1

Email body

Dear Respondent

Here is the survey.

Email font: Times New Roman Email font-size: small

Cancel < Back Next > Finish

Figure 516 Example of the Email Details page

- On completion, click **Next** to go to the Preview page.

• Based on your settings from the previous pages, a preview is shown below.
 • Click "Back" to change the email settings or content.
 • Click "Finish" to send the email(s).

Number of invitations to be sent: 1
[View Respondent List](#)

Email Preview

From:
abcde (documentation@mail.firmex.local)

Reply to:
documentation@confirmit.com

Subject:
Survey 1

Email body:

Dear Respondent

Here is the survey.

<http://co-osl-tst063/wix/p0438562.aspx?sid=JRgZDsQ4NA7FRISz9GJzWernJ3XnyzReh5HeA14ptCNhs49Fcr-ksINbRYiwsIDn0>

Cancel < Back Next > Finish

Figure 517 Example of the Email Preview page, including the survey link

- 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:

- Go to the **Respondents > Send Reminders** menu item.

The Send Reminders page opens.

Home Project Management Designer Respondents Reporting Survey Data User: Standard, Nigel Log Off

Invite Respondents Send Reminders

Reminder emails will only be sent to the respondents that have not yet completed the questionnaire

Number of reminders to be sent: 1
[Hide Respondent List](#)
 documentation@confirmit.com

Email

Sender address
 documentation@mail.firmex.local

Reply to
 documentation@confirmit.com

Display name
 abcde

Email subject
 Survey 1

Email body

Dear Respondent

Here is the survey.

Email font: Email font-size:

Cancel < Back Next > Finish

Figure 518 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.

17. Basic Panels

Note: For some customers, the Basic Panel functionality is a chargeable Add-On.

Note: The Basic Panels functionality is not available for projects using the Optimized Database format (see the The Optimized Database Format section on page 31 for more information).

The Basic Panel functionality enables project managers to create, monitor and handle panels of respondents in Confirmit. The Basic Panel functionality includes the following features:

- Creation of new panels (see the How to Create a Panel section on page 421 for more information).
- Delegating administrative permissions for panel projects and portals.
- Recruiting panelists for a panel (see the Recruiting Panelists section on page 421 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 (see the Panelist Credits section on page 443 for more information).
- Importing and exporting of panel data using the wizards (see the Data Transfer section on page 579 for more information).

Note: The Basic Panel menu commands described in this chapter are only visible and accessible when a Basic Panel project is selected in the Recent Projects and Panels list. For descriptions of the panel and portal permissions pages, see the Project Permissions topic (see the Permissions section on page 139 for more information).

17.1. 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.

17.2. The Basic Panel List

The Panel list is organized in the same way as the Project list. See the Search Lists, Projects and Basic Panels sections for further information.

17.3. 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 519 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.

17.4. Creating a New Panel Project

When you create a new Panel, the **Panel Management > Overview** window opens at the **General** tab (see the Project Management section on page 128 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.

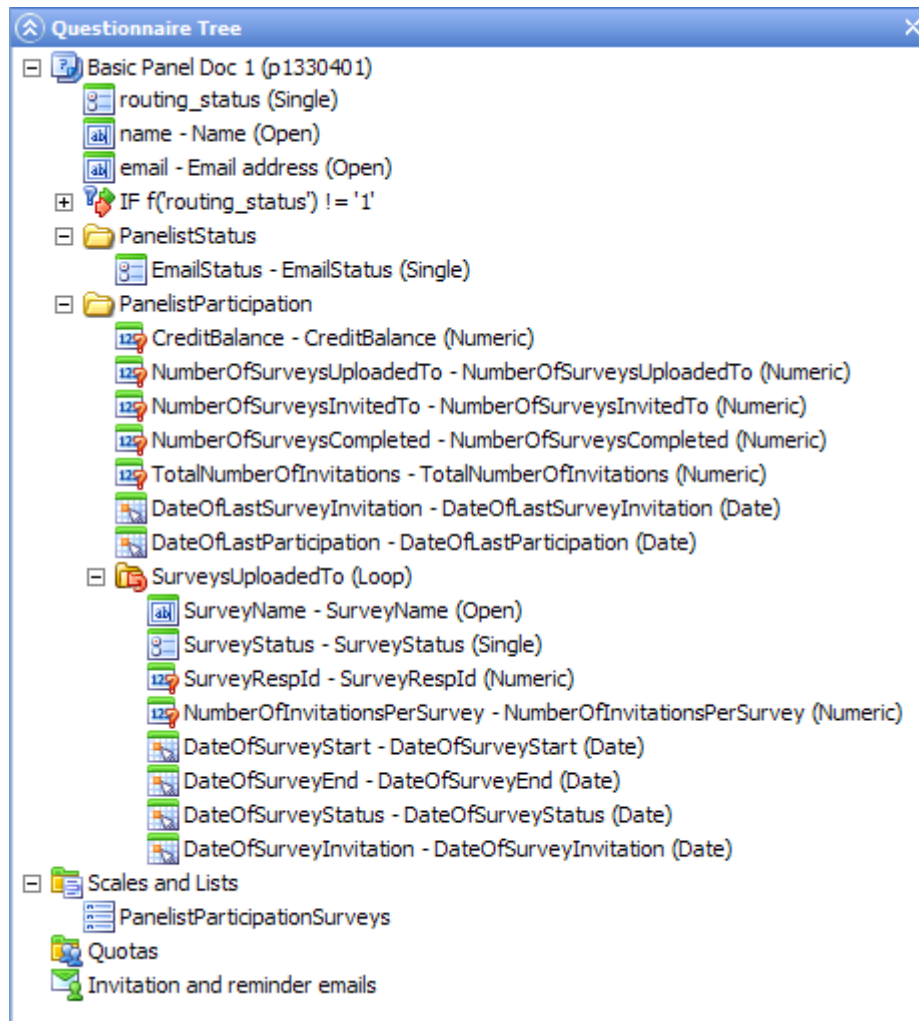


Figure 520 The default Panel questionnaire

You cannot remove the default objects from the tree, but as project manager you may customize the objects and add new questions as required.

17.4.1. 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	Project name of the survey (from overview).
SurveyStatus	The panelist's current status on the project (e.g. complete, screened etc.)
SurveyRespid	The respid of the panelist in the survey project's database.
NumberOfInvitationsPerSurvey	The number of email invitations sent to the panelist for the project (noOfEmailsSent).
DateOfSurveyStart	The date and time the project was last accessed by the respondent (interview_start).
DateOfSurveyEnd	The date and time the project was finished by the respondent (interview_end).
DateOfSurveyStatus	The date and time the survey status was last set for the panelist on the project.
DateOfSurveyInvitation	The date and time the last email invitation was sent to the panelist on the project.

17.4.2. The PanelistStatus Folder

The PanelistStatus folder contains the variable EmailStatus that will hold the Email Delivery Status (see the Email Delivery Report section on page 413 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 project and distribute the invitations to the respondents, the Email Delivery Report will be created for these respondents in the project. The delivery status from this project will also be flagged in the panel project, i.e. the respondent table for the panelist will be updated in the panel project 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.

17.5. 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.

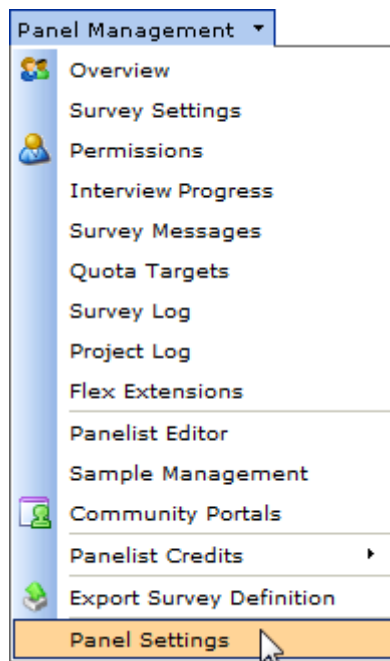


Figure 521 The Panel Management > Panel Settings menu command

The Panel Settings page opens.

 A screenshot of the 'Panel Settings' page. At the top, there is a 'Security' tab and a 'Save' button. Below this is a yellow information box with a question mark icon and the text: 'Specify password validation settings for current panel. These settings will apply for all places where it is possible to change password. E.g. Portals, registration and maintenance surveys.' Below the box are several settings:

- Password expiry days**: Input field with '0' and a help icon.
- Password history**: Input field with '0' and a help icon.
- Minimum age**: Input field with '0' and a help icon.
- Minimum required length**: Input field with '0' and a help icon.
- Minimum required non alpha characters**: Input field with '0' and a help icon.
- Minimum required non alphanumeric characters**: Input field with '0' and a help icon.
- Minimum required uppercase characters**: Input field with '0' and a help icon.
- Password similar to username**: A checkbox that is unchecked, followed by a help icon.
- Enforce https access to portals**: An unchecked checkbox.

Figure 522 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 the Password Policy section on page 3 for more information).

17.6. 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 projects (see the Preparing for Data Collection section on page 353 for more information).

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 projects in Confirmit (see the Preparing for Data Collection section on page 353 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 (see the Panelist Web Page Templates section on page 427 for more information).
- 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).

Save

General Options | Survey Channels | **Web Options** | CAPI/Kiosk Options | Layout | Validation & XSS

Active Database Production

Overall options

☒ Include back button

☐ Override browser back button to behave as survey back button

☐ Set focus to first control on page (requires JavaScript)

Email address used as sender for lost panelist passwords

Limited survey options

☐ Include a link that, upon re-entry, allows respondents to continue where they left off (Use in combination with primitive ^CLINK^ in WI Template or the "Continue link" visual component in Theme in Survey Layout)

☒ Allow respondents to change their original answers

☒ Allow respondents to re-enter a completed interview and change their answers

Warning: This functionality will not work based on status set in a script, only when set by a stop-node or when the survey is in fact completes. Workaround is to add a condition with a stop-node inside at the start of the survey that has the expression 'GetStatus()=="complete"

Survey type

☒ Open survey (Gives you a general link to the interview, which e.g. can be used as hyperlink on your website)

☒ Inline survey (Generates a script tag which can be included on any web-page, to display the survey inline or as an overlay)

Display options

Display survey to every visitor to the webpage.

Cookie options

Name: , expires in days.

Window options

Width

☒ Show as overlay

☐ Pop-up survey (open survey, but will automatically close browser window on last page)

☐ Limited survey - Email invitation survey (Requires an uploaded respondent list with email field)

☐ Limited survey with login page (Requires an uploaded respondent list with userid & password fields)

☐ Require only userid to access limited survey

☐ Limited survey with external respondent creation (Requires externally generated encrypted url)

☐ Single Sign On survey (Requires respondents to be uploaded with a username column)

Figure 523 Survey Settings for Panels

For descriptions of the remaining properties, refer to the Survey Settings section in the Preparing for Data Collection chapter (see the Survey Settings section on page 353 for more information).

17.7. Panelist Web Page Templates

You can edit the web page templates using HTML code.

1. Go to the **Home > Templates > Panel** menu command to access the Panelist Pages Templates Editor. The Panel Templates page opens.
2. Click on a template in the Template List then click **Edit** to open the Editor for that template.

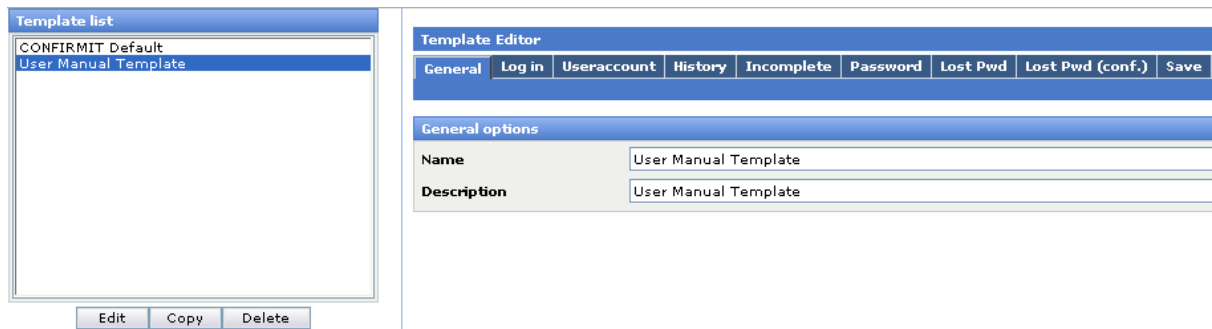


Figure 524 Example of the Panel Template Editor

The buttons and tabs are as follows:

- **Edit** – click to open the selected template for editing.
- **Copy** – click to create a copy of the selected template.
- **Delete** – click to delete the selected template.
- **General tab** – contains general settings for the template. When you click **Edit**, this page is displayed by default.
- **Log in tab** – allows you to edit the layout of the panelist login page.
- **User account tab** – allows you to edit the layout of the panelist User account page.
- **History tab** – allows you to edit the panelist History page layout.
- **Incomplete tab** – allows you to edit the panelist Incomplete page layout.
- **Password tab** – allows you to edit the panelist Password page layout.
- **Lost Pwd tab** – allows you to edit the Lost Password page definition.
- **Lost Pwd (conf.) tab** – allows you to edit the Lost Password confirmation page definition.
- **Save** – click to save the changes.

The General tab has the following fields:

- **Name** – enter the name of the template here.
- **Description** – provide a short description of the template.

The figure below shows the template editor for the panelist Login page:

Template Editor

General

Log in

Useraccount

History

Incomplete

Password

Lost Pwd

Lost Pwd (conf.)

Save

'Log in' page definition

```

<HTML>
<HEAD>
<TITLE>Log in page</TITLE>
</HEAD>
<BODY BGCOLOR=white>
<P>
<TABLE border=0 cellPadding=0 cellSpacing=0 width="100%">
  <TR>
    <TD noWrap><FONT size=3><B>^TXTTITLE^</B></FONT></TD>
    <TD vAlign=center width=*>
      <TABLE bgColor=black border=0 cellPadding=0 cellSpacing=0 height=1>
        <TR>
          <TD width=1000 height=1 bgcolor=black></TD>
        </TR>
      </TABLE>
    </TD>
  </TR>
  <TR>
    <TD colspan=2>^TXTHEADER^</TD>
  </TR>
</TABLE>

```

Preview

'Log in' primitives

^TXTTITLE^	Page title	^TXTHEADER^	Introtext
^TXTPLSLOGIN^	Login text	^TXTPLSUSERANDPW^	Instruction
^ERRORMSG^	Error message	^TXTUSERNAME^	Username text
^FIELDUSERNAME^	Username field	^TXTPW^	Password text
^FIELDPW^	Password field	^FORMACTION^	HTML FORM action
^BTNOK^	OK button	^BTNOKTEXT^	OK button text
^HREFTXTLOSTPWD^	Lost password link text	^FNCLOSTPWD^	Lost password link function

Figure 525 Login Page Template Editor

The remaining Template Editor tabs have a similar layout. Edit the template in HTML, and click **Preview** to see a preview of the page.

17.7.1. Primitives

The template is created using HTML code. To include specific text fields and text in the template, use the primitives that are listed below the editing window. For example, note the text **^TXTTITLE^** in the center of the text field in the previous figure.

Primitives are codes that insert the default text for the page. For example, the primitive **^TXTHEADER^** on the "Incomplete" page gives the following text in English:

You have not participated in the following surveys

Whereas the same primitive on the "History" page gives:

You have participated in the following surveys

The messages that are presented to the respondents are translated into English, Norwegian, Swedish, German, French, Spanish, Finnish, Danish, Italian, Dutch and Portuguese. For other languages, error messages will default into the main category (for example, Venezuelan Spanish will default to Spanish). If a language is not available, the error messages will be displayed in English, this being the overall default language.

Click the **Preview** button to show the layout of the particular page.

PANELIST LOGIN PAGE

This is the panelist login page



Please Log In

The user name or password is illegal

Please type your user name and password to enter

User Name

Password

OK

Powered by CONFIRMIT

Figure 526 Preview of the Panelist Login page

Click the << button to return to the editing page.

Note: All the points above about the Login page also apply to the User account, History, Incomplete, and Password pages.

17.7.2. Lost Password Requests

If a panelist should forget his/her password, they can ask for it to be sent to them by clicking on the "Forgot your password?" link on the login page. To include this functionality on the panel login page, use the primitives ^FNCLOSTPWD^ and ^HREFTXTLOSTPWD^.

When the panelist clicks on the "Forgot your password?" link on the login page, a pop-up opens, prompting for his/her email address. The pop-up may look, for example, as follows:



Please type in your email address.

Please enter a valid email address.

OK Cancel

Figure 527 Example of a Panelist email address pop-up

Edit the layout of this pop-up in the **Lost Pwd** tab in the Panel template.

Note: For security reasons, no error message will be generated if the email address provided is not found in the panel.

If the email address is found, two separate emails will be sent to that address, one containing the userid and the other the password. The sender of those emails is set up in Survey Settings, in the field: "Email address used as sender for lost panelist passwords" (see the Survey Settings section on page 353 for more information).

17.8. Panelist Editor

Once the respondents start replying to the panel survey, the project manager can view the recruited panelists and edit the panelist details.

To view the panelists of a particular panel, go to the **Panel Management > Panelist Editor** menu command.
The Panelist Editor window opens.

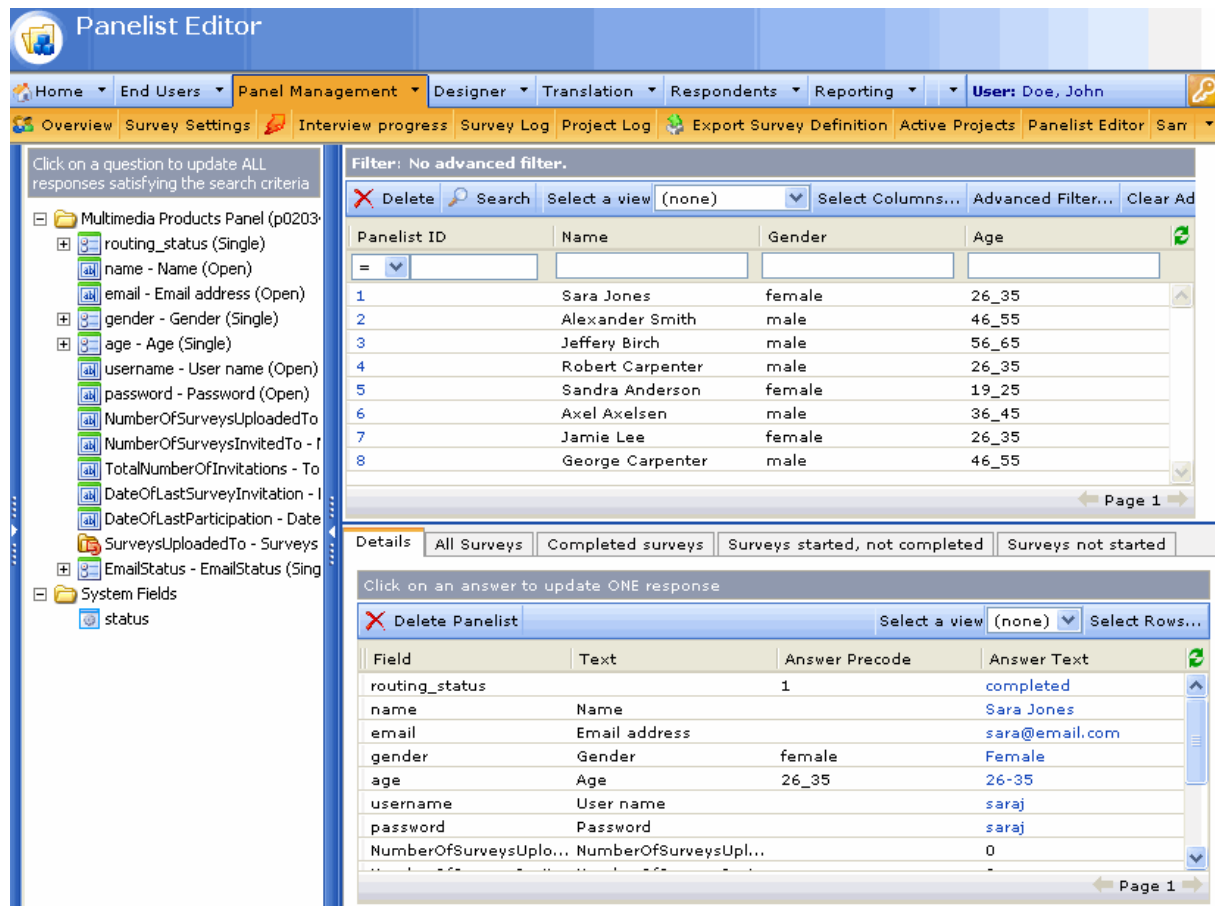


Figure 528 Example of the Panelist Editor window

The Panelist Editor's search and edit functionality is the same as that of the Survey Data Editor (see the Edit Survey Data section on page 570 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.

17.9. Sampling Functionality

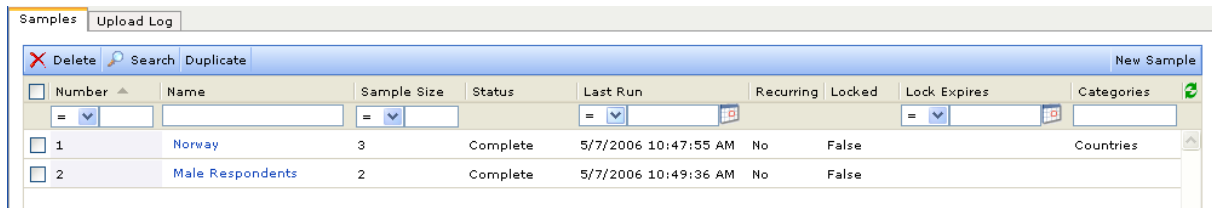
The Sampling functionality allows you to define several samples within the same panel, and send out different surveys to different samples as required.

17.9.1. 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.



Number	Name	Sample Size	Status	Last Run	Recurring	Locked	Lock Expires	Categories
1	Norway	3	Complete	5/7/2006 10:47:55 AM	No	False		Countries
2	Male Respondents	2	Complete	5/7/2006 10:49:36 AM	No	False		

Figure 529 Example of a Sample List page

2. Click the **New Sample** button in the upper right corner of the list.

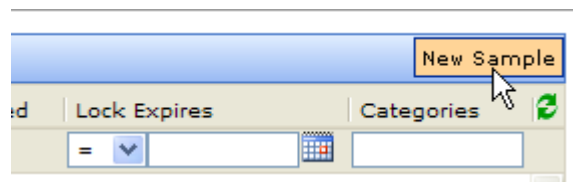
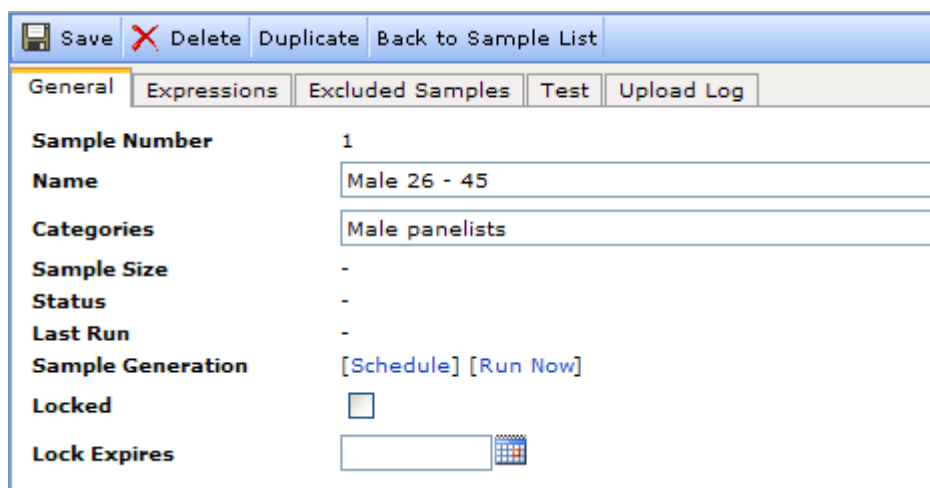


Figure 530 Creating a new sample

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.



Save Delete Duplicate Back to Sample List General Expressions Excluded Samples Test Upload Log	
Sample Number	1
Name	Male 26 - 45
Categories	Male panelists
Sample Size	-
Status	-
Last Run	-
Sample Generation	[Schedule] [Run Now]
Locked	☐
Lock Expires	

Figure 531 Sample Definition

17.9.2. 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.

17.9.3. 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. To create a new expression:

1. In the Expressions tab, click **New Expression** in the upper right corner.

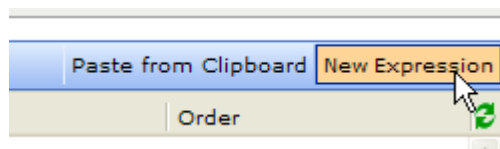


Figure 532 Creating a new Expression

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.

Expression builder [Close]

Name Male 26-45

Count 250 number

Order Random

Expression

User Guide Panel (p258066320)

- status (System)
- interview_start (System)
- interview_end (System)
- routing_status (Single)
- name - Name (Open)
- email - Email address (Open)
- gender - Gender (Single)
- age - Age (Single)
- IF f('routing_status') != '1'
- THEN
- username - User name (C
- password - Password (Op
- PanelistParticipation (Folder)
 - NumberOfSurveysUploadedT
 - NumberOfSurveysInvitedTo
 - TotalNumberOfInvitations - T
 - DateOfLastSurveyInvitation
 - DateOfLastParticipation - Da
- SurveysUploadedTo (Loop)
 - SurveyName - SurveyNar
 - SurveyStatus - SurveySt
 - SurveyResnId - SurveyRi

Male 26-45

- AND
 - gender IN Male
 - age IN 26-35,36-45
- OR
 - DateOfLastSurveyInvitation < 27.11.2004
 - NumberOfSurveysInvitedTo = 0

(gender IN Male AND age IN (26-35,36-45) AND (DateOfLastSurveyInvitation LESSTHAN 20041127 OR NumberOfSurveysInvitedTo EQUAL 0))

Field	Operator	Value
<select field>	<select operator>	<select value>

OK Cancel

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Figure 533 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.

- 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.

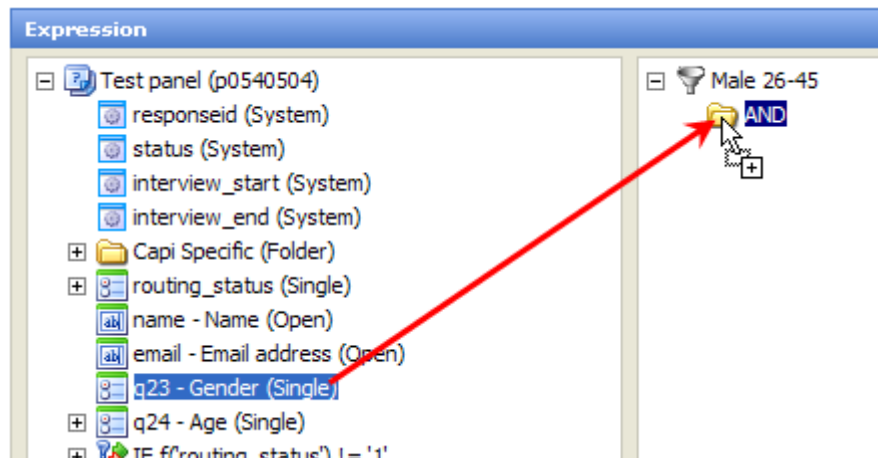


Figure 534 Dragging a question onto the operator icon

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 The Advanced Filter Designer section on page 530 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.

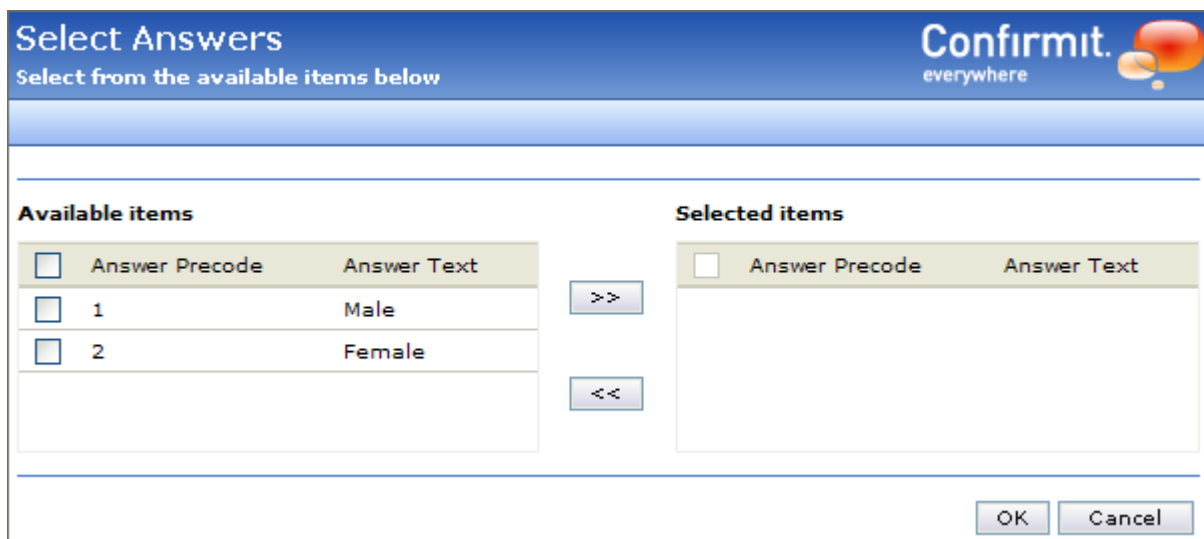


Figure 535 Excluding samples

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.

Save Delete Duplicate Back to Sample List

General Expressions Excluded Samples **Test** Upload Log

Expression Number	Name	Count	Estimated Count	Order
=		=		
1	Male 26-45	*	-	Random

Page 1

Test sample Ignore Locked Samples ☐

Figure 536 The Test tab

Click on the Upload Log tab to track which projects the sample has been uploaded, to and when it was uploaded.

Save Delete Duplicate Back to Sample List

General Expressions Excluded Samples Test **Upload Log**

Id	Project Id	Sample Size	Upload Size	User	Date	Task Id
1	p0064342	8	8	johnndoe	9/23/2005 3:35:22 PM	4803
3	p0221931	8	8	johnndoe	9/23/2005 3:37:28 PM	4805
4	p0060487	8	8	johnndoe	9/23/2005 3:37:59 PM	4806

Figure 537 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**.

Save Delete Duplicate Back to Sample List

General **Expressions** Excluded Samples Test Upload Log

Delete Search Duplicate **Copy to Clipboard** Paste from Clipboard New Expression

Expression Number	Name	Count	Order
=		=	
1	Male 26-45	*	Random

Figure 538 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.

17.10. Uploading Samples to Projects

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) .

Indexed	☐
Variable type	Normal
Question Skin	Normal
Not required	Hidden
Bitstream variable	Background
Read only	Recoded variable
	Panel variable (hidden)
	Panel variable (visible)

Figure 539 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 Community 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 The General Tab section on page 184 for more information).

Note: Confirmit does not support sampling from both Basic Panel and Community 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 (see the Panelist Login Pages section on page 439 for more information).

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.

Panel ID	Panel Name	Company	Created By	Created	Keywords	Closed
p1800105	Confirmit 9.0 Days	Confirmit	Oksendal, Kjell	13/10/2004 03:13:03		
p3230187	Copy of Experian panel v2	Confirmit	Phillips, Mark	14/12/2004 10:02:25		
p8586188	Canvase Opinion Panel (v2) - BACKUP	Confirmit	Wennesland, Rune	01/06/2005 10:31:32	backup	
p15237086	Community X Panel	Confirmit	Oksendal, Kjell	29/11/2005 12:03:33		
p17330487	Copy of Community X Panel	Confirmit	Gallivan, John	18/01/2006 11:09:33		
p18379420	Community X Panel	Confirmit	Kvaley, Kåre	06/02/2006 15:13:13		

Figure 540 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.

Number	Name	Sample Size	Status	Last Run	Recurring	Locked	Lock Expires	Categories
1	First Sample	3	Complete	19/11/2009 20:04:54	No	False	20/11/2009	

Figure 541 Example of a sample list for a selected project

3. Highlight the sample you want to upload to the survey, then click **Next**.

The Properties dialog opens.

Active Database **Production**

Figure 542 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** - any uploaded data that has a matching key field in the database will be updated. Uploaded data that has no matching key field in the database will be added to the database.
3. Select whether you wish to append the selected sample to any existing samples in the project, 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.
 4. 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 (see the Panelist Login Pages section on page 439 for more information)

17.11. Survey Overview in a Panel

The Project Manager can view all the projects linked to a panel. To do this:

1. Select a panel.
2. Go to the **Panel Management > Overview** menu command.

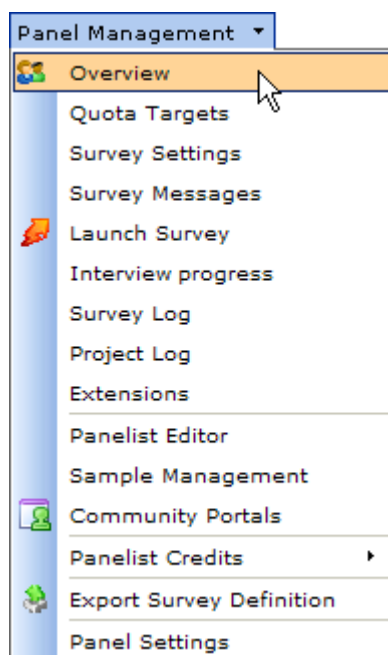


Figure 543 Select Active Projects

The Panel Overview page opens.

3. Go to the Active Projects tab.

The Active Projects list appears. This page lists all projects that panelists from this panel have been uploaded to. Click on a project to enter it.

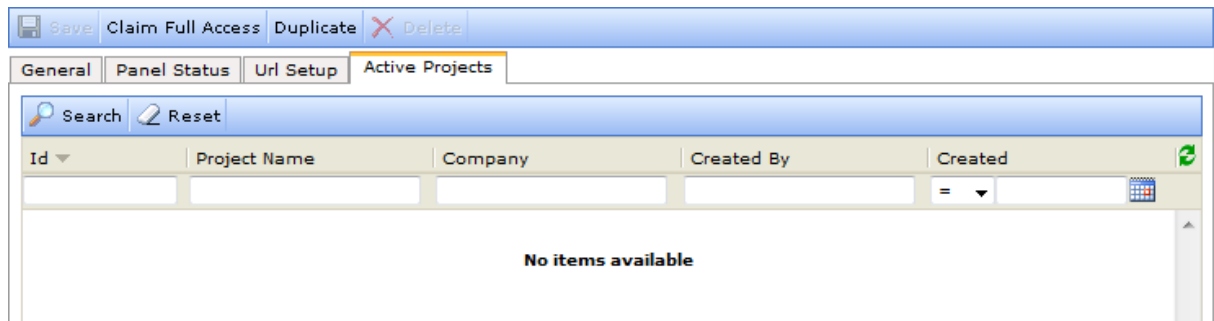


Figure 544 Example of an Active Projects list

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 projects will be displayed per page. To change this quantity, click into the Page Size field and type in the required number, then click **Search**.

17.12. Panelist Login Pages

When surveys have been linked to the panel, the project manager can send the panelists the link to the web page where they can access their surveys, as well as edit their profile. You can also send out emails with login page information automatically after the respondents have been recruited to a Panel, by using for example the following script in the Panel survey.

```
SendMail ("sender.name@email.com",f("email"),"Welcome to This Panel",
"Dear "+f("name")+","+"\\n"+"\\n"
+"This is to confirm that you are now added to my list of survey
recipients"+"\\n\\n"
+"By going to the following link you can log on to your survey
overview."+"\\n"
+"http://survey.confirmit.com/wi/"+CurrentPID()+"/login.asp"+"\\n"
+"This page will always be updated with the surveys you have, are, or
can participate in."+"\\n"
+"To log on simply type in your username and password."+"\\n"
+"In your profile we have registered the following login
information:"+"\\n\\n"
+"Username: "+f("username")+""\\n"
+"Password: "+f("password")+""\\n\\n"
+"Best regards,"+"\\n"
+"Your Signature"+"\\n"
)
```

Note: The SendMail script sends email either as HTML or plain text, but not both (a multipart message). SendMailMultipart will send to both. For further information, refer to the Scripting manual.

1. Add a script node to the survey you want to send out an email from. It can be placed in a condition, or after a specific question. If you use respondents' answers from one or more specific questions, ensure the script node appears after these questions.
2. Inside the script node, paste in the text above then modify the text to meet your requirements.

3. All displayed text must be typed inside quotation marks. Between brackets of text you must add a + to ensure that the text will be displayed. Text caught from within the survey, referred to by the question ID, does not have to be written inside quotation marks, except the ID itself inside the f-function.
4. Line shift is marked by a \n typed inside quotation marks. To create a paragraph shift, write \n twice: +"\n\n". Remember to use the quotation marks for line shifts as well as regular text.
5. Enter the project number of the panel you are inviting users to instead of the Xs in the URL address in the email.

The link to the panelists' web page will always be as follows:

USA Server:

<https://survey.confirmit.com/wi/pXXXXXX/login.asp>

Euro server:

<https://survey.euro.confirmit.com/wi/pXXXXXX/login.asp>

Where pXXXXXX is the project ID number of the panel.

The panelist must enter the address in a browser and the Login page shown below will be displayed. The panelists must then enter the username and password they provided when they signed up for the panel.

On-Demand only:
The link to the panelists' web page will be: <http://survey.confirmit.com/wi/pXXXXXX/login.asp>. Where pXXXXXX is the project ID number of the panel.

PANELIST LOGIN PAGE

This is the panelist login page

Please Log In

Please type your user name and password to enter

User Name

Password

Powered by CONFIRMIT

Figure 545 Example of a panelist Login page

When the panelist has provided the correct login information, the page shown below will be displayed, offering the panelist the opportunity to edit the profile, change the password, view the history of his/her surveys, and answer new and complete commenced, but not completed surveys.

WHAT DO YOU WANT TO DO TODAY?_____

Welcome, Axel Axelson. Please select an action.

Options	
Edit profile	Change the account information
Password	Change password
Surveys	List of participated surveys
Incomplete surveys	List of incomplete surveys

Figure 546 The panelist's options

When the panelist clicks the **Edit profile** link, he/she will be brought to the part of the panel survey where the name and the email address were registered. The panelist can now update the name and email information. This information is automatically changed in the panelist database.



firm

Please enter your name

Axel Axelson

Please enter your email address

axel@firmglobal.com

Please, specify your gender:

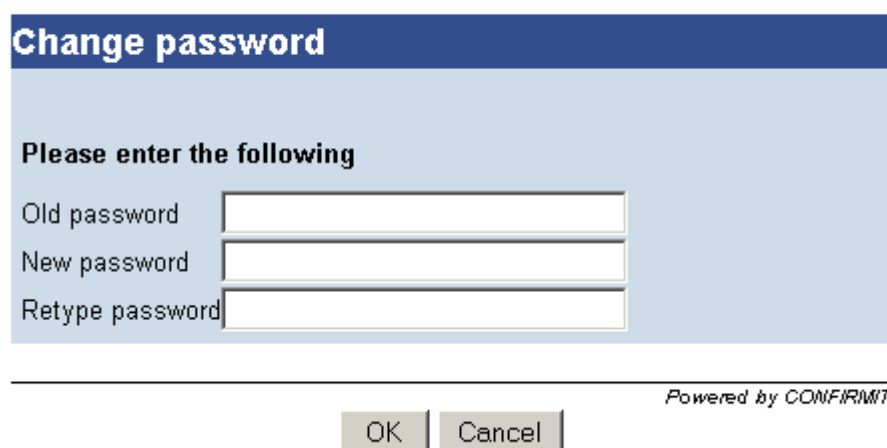
☒ Male

☐ Female

Figure 547 Example of the Edit Profile page

When the panelist clicks the **Change password** link, the page shown below opens.

CHANGE PASSWORD



Change password

Please enter the following

Old password

New password

Retype password

OK Cancel

Powered by CONFIRMIT

Figure 548 Example of the Change Password page

Here the panelist can change his/her password. The information is automatically updated in the panelist database.

The **History of surveys** link provides the panelist with an overview of the surveys in which he/she has participated.

SURVEY HISTORY

You have participated in the following surveys

History of surveys		
Name	ID	Date and Time
Panelist Project 2	p0033508	19.05.2001 12:25:44

Back

Figure 549 Example of the Survey History page

The **Not completed surveys** link takes the panelist to an overview of the surveys in which he/she has not yet participated, or which he/she has commenced but not completed.

SURVEYS NOT COMPLETED

You have not participated in the following surveys

Incomplete surveys		
Name	ID	
Panelist Project 1	p0033256	Participate now!
Panelist Project 2	p0033508	Participate now!
Panelist Project 3	p0033601	Participate now!
Panelist Project 4	p0033677	Participate now!
Panelist Project 5	p0033751	Participate now!

Back

Figure 550 Example of the Surveys Not Completed page

The panelist can enter the surveys from their login page. If they click the **Participate now** link, the survey will open in a new window.

17.13. Panelist Credits

This menu command enables you to import and export panelist credits (see the Credit balance section on page 463 for more information). The menu contains two options:



Figure 551 The Panelist Credit menu

17.13.1. 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.

A screenshot of a dialog box titled 'Export Panelist Credits'. It has three fields: 'Transfer Type' with a dropdown menu showing 'Email', 'Email Address' with a text box containing 'documentation@confirmit.com', and 'Start Time' with a dropdown menu showing 'ASAP'. There is an 'OK' button at the bottom left.

Figure 552 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.

17.13.2. 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 the How to Export Panelist Credits section on page 443 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 project ID of the project 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 project. 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 553 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).

17.14. Community Portals

In Confirmit you can build a library of panelist interfaces, called Community 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 Community 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 the Basic Panels section on page 421 for more information).

To access the portals currently connected to a panel, go to the **Panel Utilities > Community Panels** menu command whilst in the panel.

17.14.1. What is a Community Portal / Panelist / Panel

Collecting feedback via the Internet gives tremendous possibilities. You can interview your employees and your customers, and conduct surveys towards your markets, for example mapping the profiles of the people visiting your website. Within the Market Research industry, many agencies also use Panels to collect data and conduct research.

A panel functions in the same way a normal survey. Typically, a panel consists of mapping/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 (community), you can select appropriate respondents to surveys.

A Community 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 554 Example of a Community Portal

Community Portals can only be used together with Confirmit Panels. For further details on Panels, see the Confirmit Community Panels User Guide.

17.14.2. The Community Portal List

From the list of available portals you have direct access to the Community 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 Community 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.

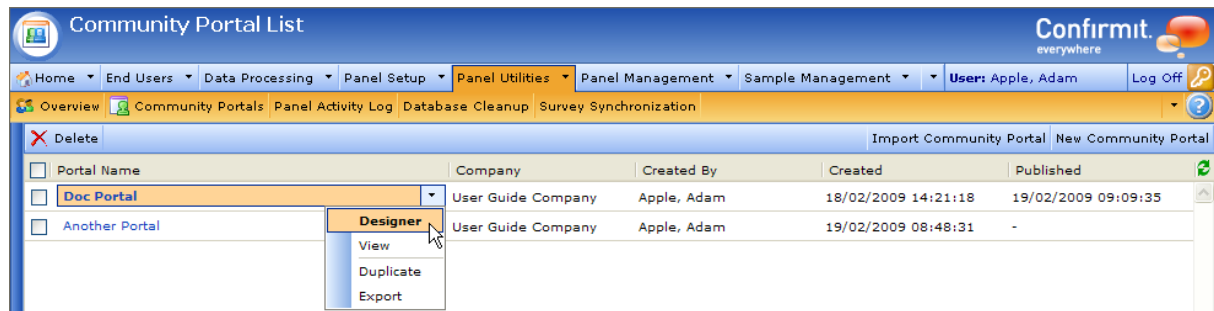


Figure 555 Accessing a Community Portal

17.14.3. How to add a Community Portal to your Panel

A Community Portal can be activated on Confirmit Panels only. You can do this in two ways; either by adding an existing Community Portal template to your panel (this is the most common approach) or by creating a Community Portal from scratch. Note that the portal must be published before it can be added to a panel.

To add a Community Portal to a Confirmit Panel:

1. In Confirmit, go to the **Home > Community Panels** menu command.
2. In the Community Panel List, click on the required panel to open it.
3. Go to the **Panel Utilities > Community Portals** menu command.

This opens the Community Portals List, which contains all the portals currently attached to this panel (if any). You can now import an existing panel (see the Importing an Existing Community Portal to a Panel section on page 448 for more information), or you can create an entirely new portal for the panel (see the Creating a new Community Portal within a Panel section on page 447 for more information).

17.14.3.1. Creating a new Community Portal within a Panel

When you enter Community Portals for a Panel, Confirmit lists all the portals that you have access to. The current portal (if any) is shown in bold.

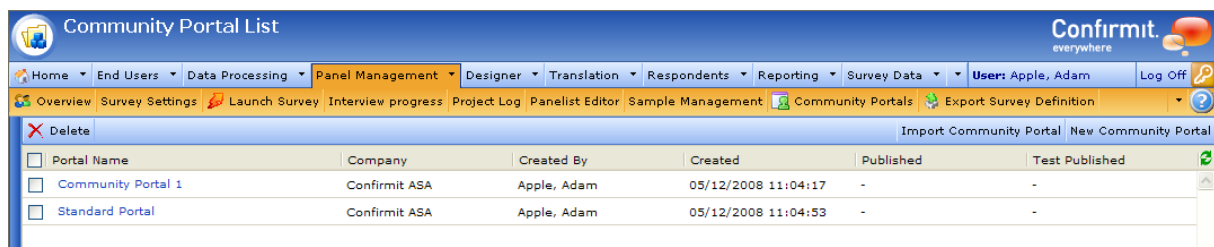


Figure 556 Example of a list of available Community Portals

To create a new Community Portal:

1. Click the **New Community Portal** button.
Confirmit takes you through a two-step wizard.
2. In step one, give your new portal a name.
If you then choose **Finish**, an empty Portal Designer page opens. If you choose **Next**, Confirmit allows you to choose a template on which to base your new Community Portal.
3. 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 Community Portal section.

To import Community Portals created on other Confirmit installation, click the **Import Community Portal** button (see the Importing an Existing Community Portal to a Panel section on page 448 for more information).

17.14.3.2. Importing an Existing Community 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 Community Portal List, right-click on the portal you wish to export and select **Export** from the drop-down menu.

The Export Properties dialog opens.

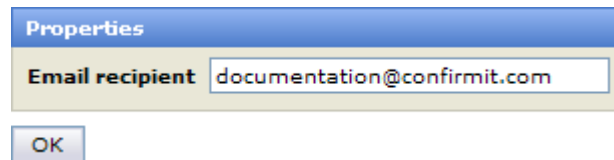


Figure 557 The Community Portal Export Properties dialog

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 Community Portal List, click **Import Community Portal**.

The Import Properties overlay opens.

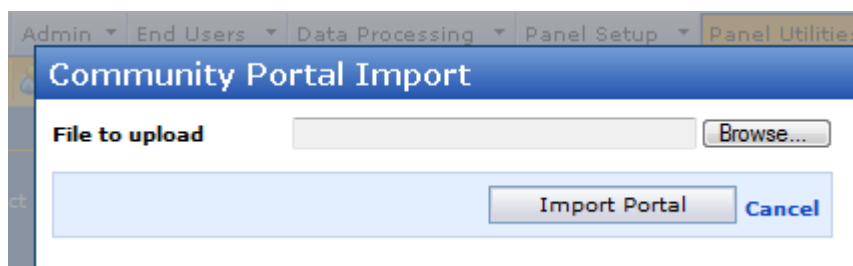


Figure 558 The Community Portal Import Properties dialog

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 Community Portal List.

The imported portal definition is included in the list. You can now open it and edit it as required.

17.14.4. Working with your Community Portal

The Community 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 seven Pages visible. In addition, in this case the Members folder contains six further pages (see the Folders section on page 457 for more information).

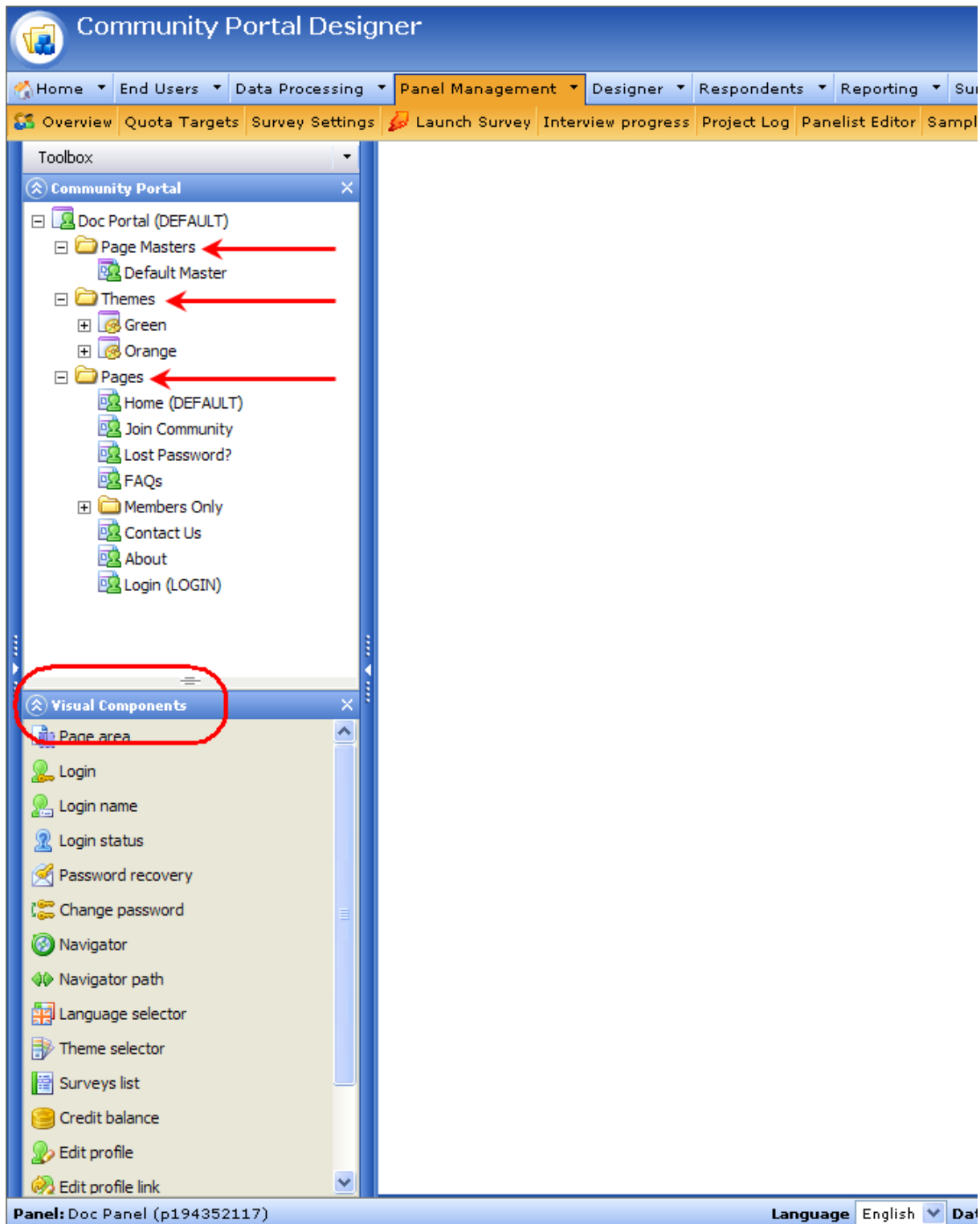


Figure 559 The toolboxes inside Portal Designer

The Portal Designer contains two toolboxes:

- The Community Portal toolbox holds all your Page Masters (see the Page Masters section on page 450 for more information), Themes (see the Themes section on page 451 for more information), and Pages (see the Pages section on page 454 for more information).
- The Visual Components toolbox contains the elements that you can use on a page (see the Visual Components section on page 459 for more information).

In the Community Panel toolbox, right click on the portal name and select Properties or double-click on the name to open the portal's Properties page (see the Properties on a Community Portal section on page 467 for more information).

17.14.4.1. Page Masters

A Page Master is an overall page look-and-feel. You can create as many page layouts as you wish. You can apply a page master to each portal page. Each portal page will then have the look-and-feel specified by the associated Page Master.

17.14.4.1.1. 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 "Main PM".

2. To edit a Page Master, double-click the name of the Page Master or right-click and choose **Edit**.

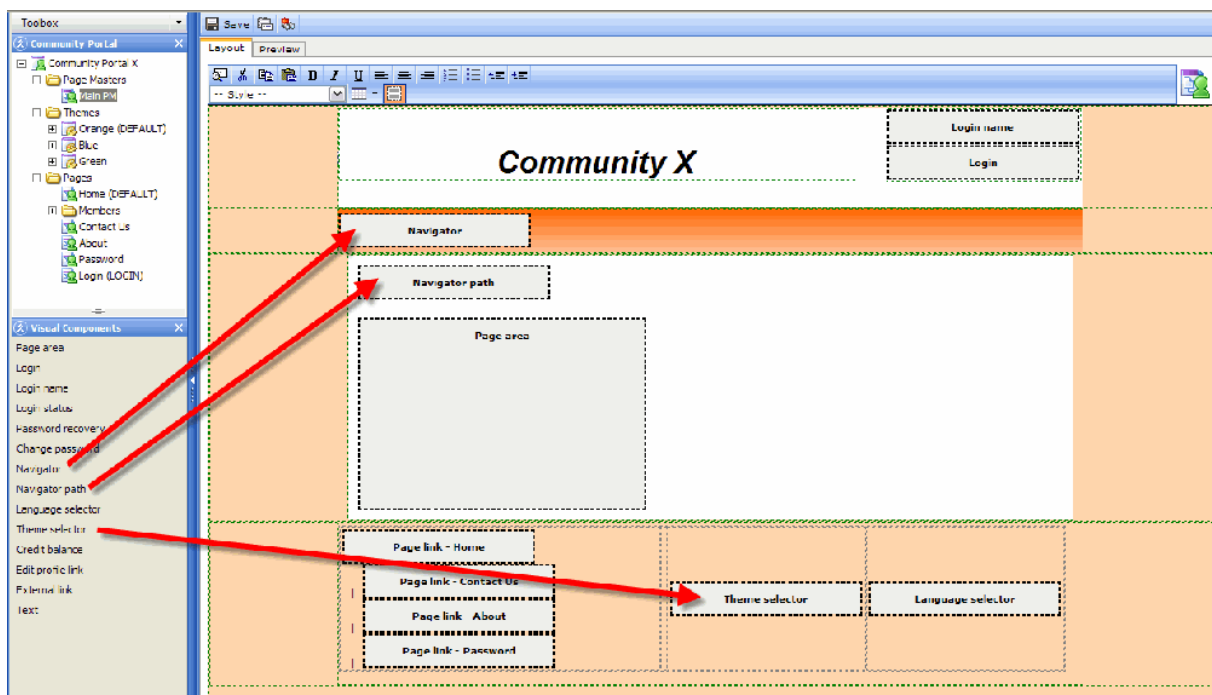


Figure 560 Editing a Page Master

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 the Visual Components section on page 459 for more information).

You can use HTML tables, free-form text and images on your portal pages (see the Editing your Page Masters and Portal Pages section on page 472 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.

17.14.4.2. Themes

A theme is a collection of different Styles, each holding a specific layout definition. Inside a Community 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 the Visual Components section on page 459 for more information).

17.14.4.2.1. Styles

Click the plus sign in front of a Theme to see all the styles for that Theme. In the figure below, you can see all styles in Theme "Orange". This means that when Theme "Orange" is in use, the Visual Components (and free-form text) can be assigned 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**) as shown in the figure below.

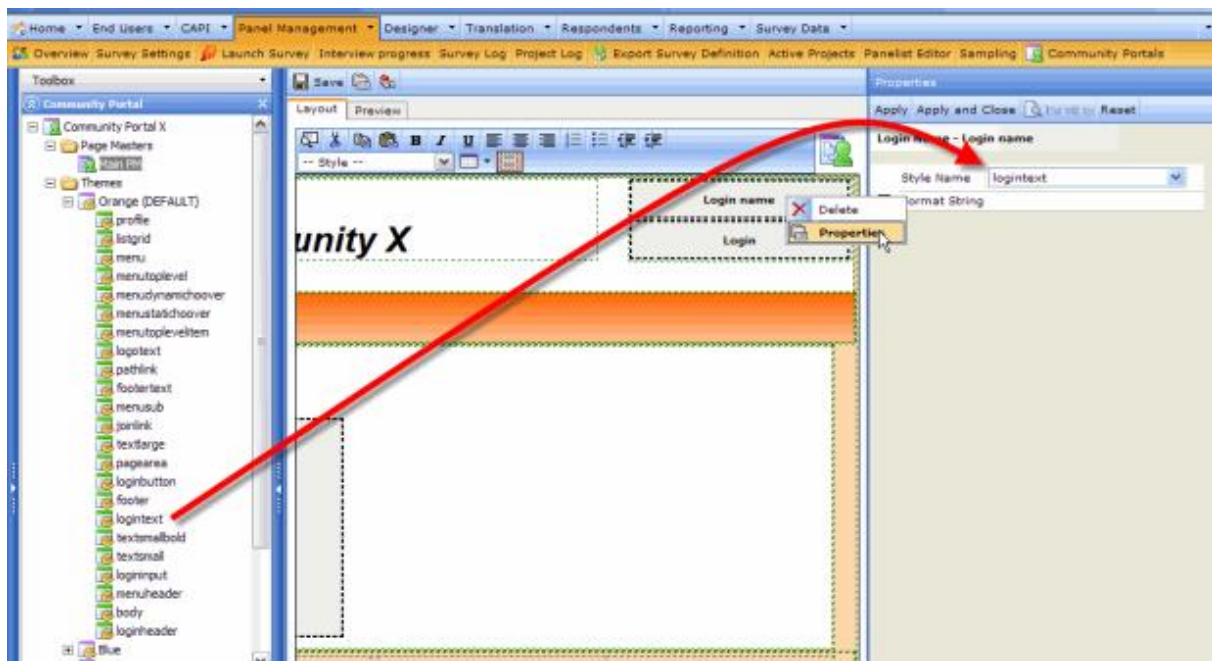


Figure 561 Applying a style for a Visual Component

The components's Properties page opens.

2. Click the down-arrow beside the Style Name field and select as its style, then click **Apply**.

A style has its own properties.

1. In the Community Portal toolbox, Double-click the style (or right-click the style and choose **Properties**).
The style designer opens up in the frame on the right.

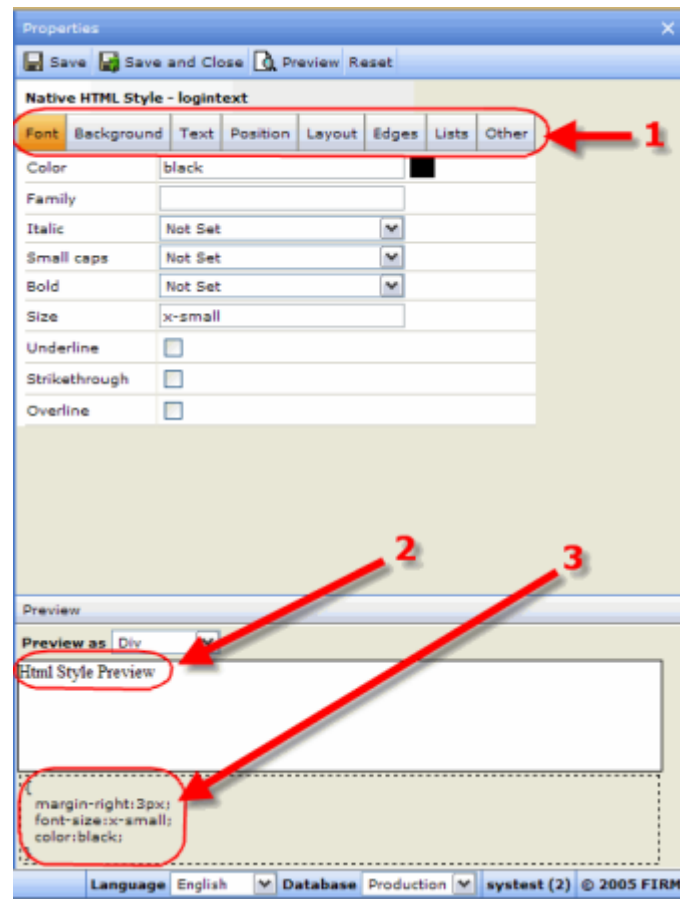


Figure 562 Working with Styles

The figure shows properties for the “logintext” 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 so 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 the Visual Components section on page 459 for more information).

17.14.4.2.2. 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 Community 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 Community Portal toolbox.

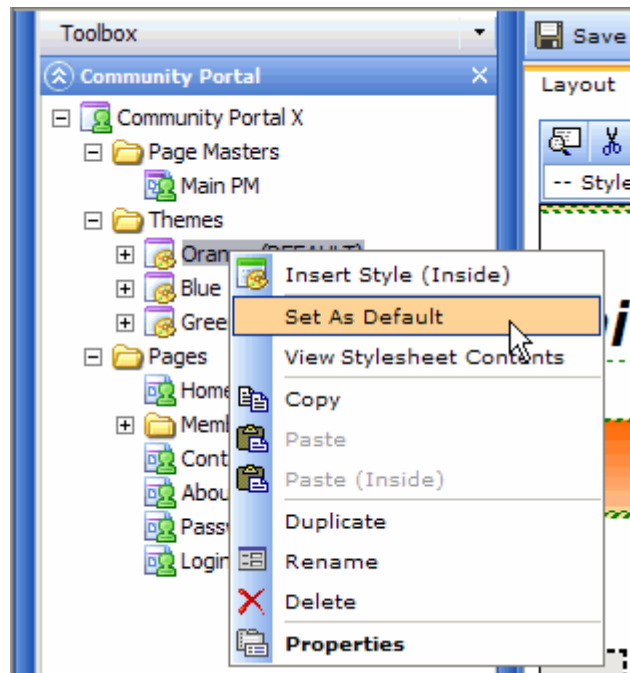


Figure 563 Setting a theme as Default

17.14.4.2.3. 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.

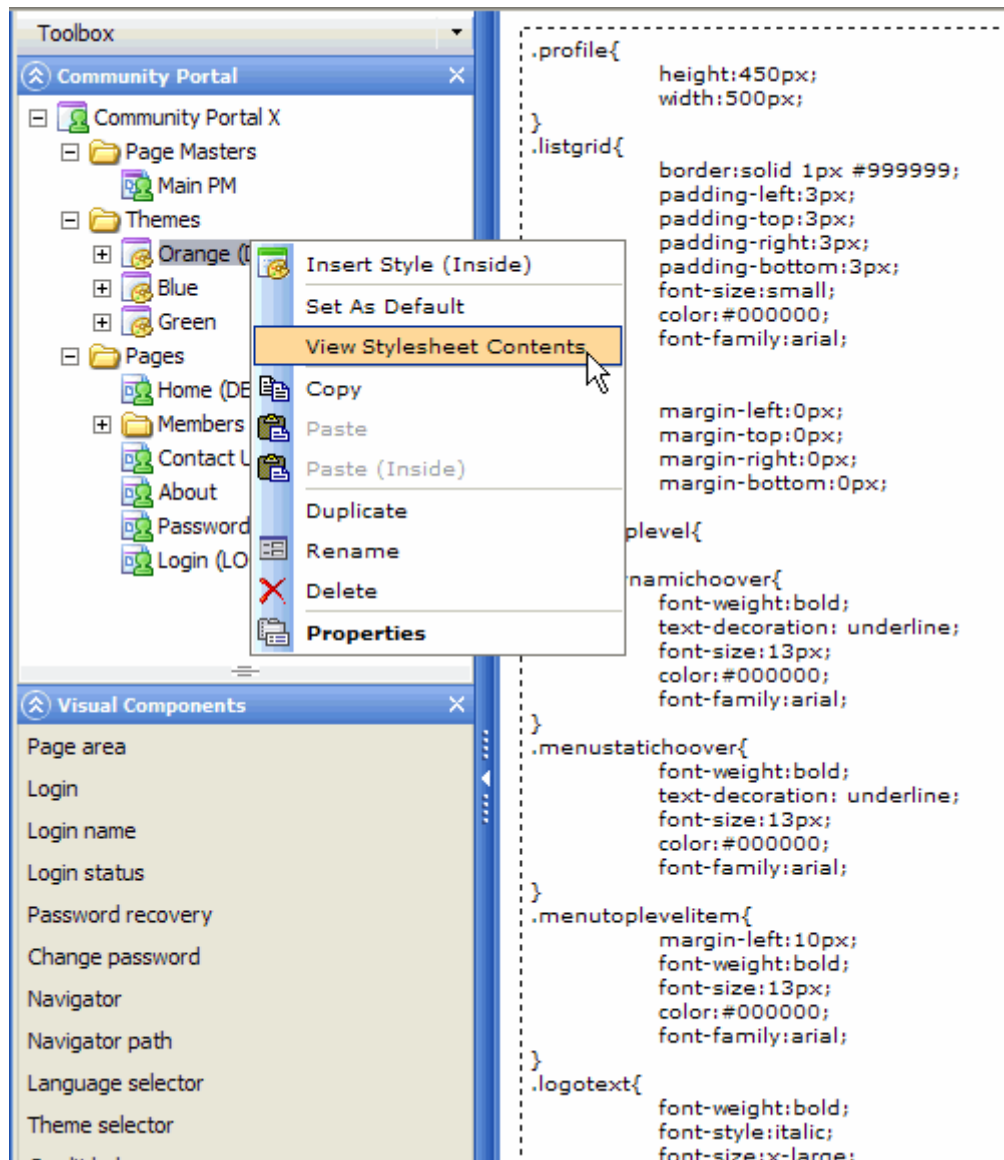


Figure 564 Selecting View Stylesheet Contents

17.14.4.3. Pages

The third main folder inside the Community 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 Community 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 565 Previewing a portal page

To see the page set-up, click the **Layout** tab.

17.14.4.3.1. 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, and the components' positions on the page.

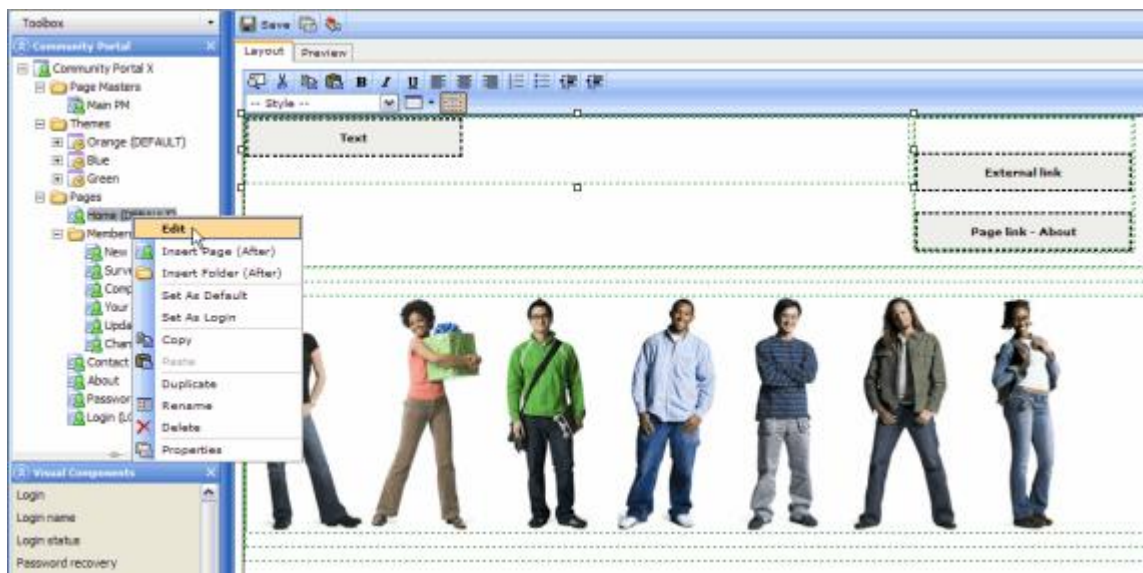


Figure 566 Editing a Page

Assume that on this page we want to show some text (the text element), an external link, and a link to the page called “About”. We have also inserted an image across the bottom of the page. We have right-clicked on the page, and under page properties, set the Page Master for this page to be “Main PM” (see the Page Masters section on page 450 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. 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, and the portal page “Home” is placed where the Page Area element is (see the Pages section on page 454 for more information).

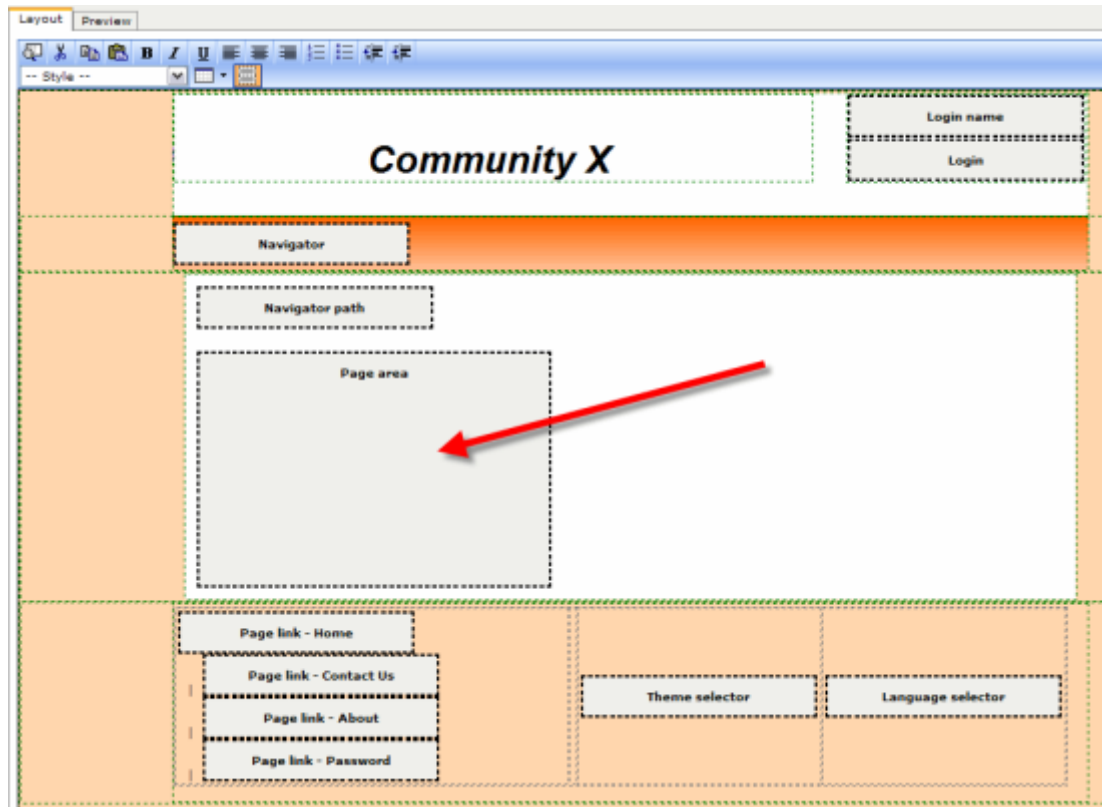


Figure 567 The location of the Page Area component

17.14.4.3.2. 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 Community Portal toolbox.

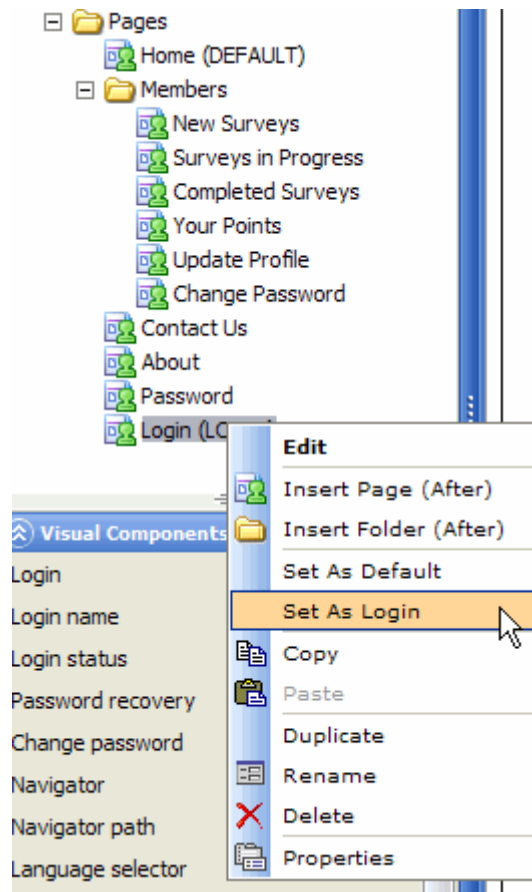


Figure 568 Selecting Set as Login

17.14.4.3.3. 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”, “Contact Us”, and “About” come up as separate pages on the menu bar. The folder “Members” creates a drop-down menu that leads to all the pages inside the folder. The page “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 569 Using Folders and pages to create menus and sub-menus for the respondent

17.14.4.3.4. 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.

Properties	
Page - Home	
Page Master	Home
Name	Home
Protected	☐
☒ Navigator Item	
Visible	☒
Hide When Logged In	☐
Visible When Not Logged In	☒
☒ Title	
English	
☒ Description	
English	

Figure 570 The Page Properties page

- To specify which **Page Master** is to be used for the page (see the Page Masters section on page 450 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.
 - o **Visible** - check the box if you want to ensure the page will be visible all the time.

- o **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.
- o **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).

17.14.4.4. 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.

17.14.4.4.1. Page Area

The “Page Area” component determines where the page (portal page) is to be located on the overall page (Page Master) (see the Editing a Page section on page 455 for more information).

17.14.4.4.2. Login

The Login element displays the username and password text-fields to the panelists. See the upper right hand corner of both images.

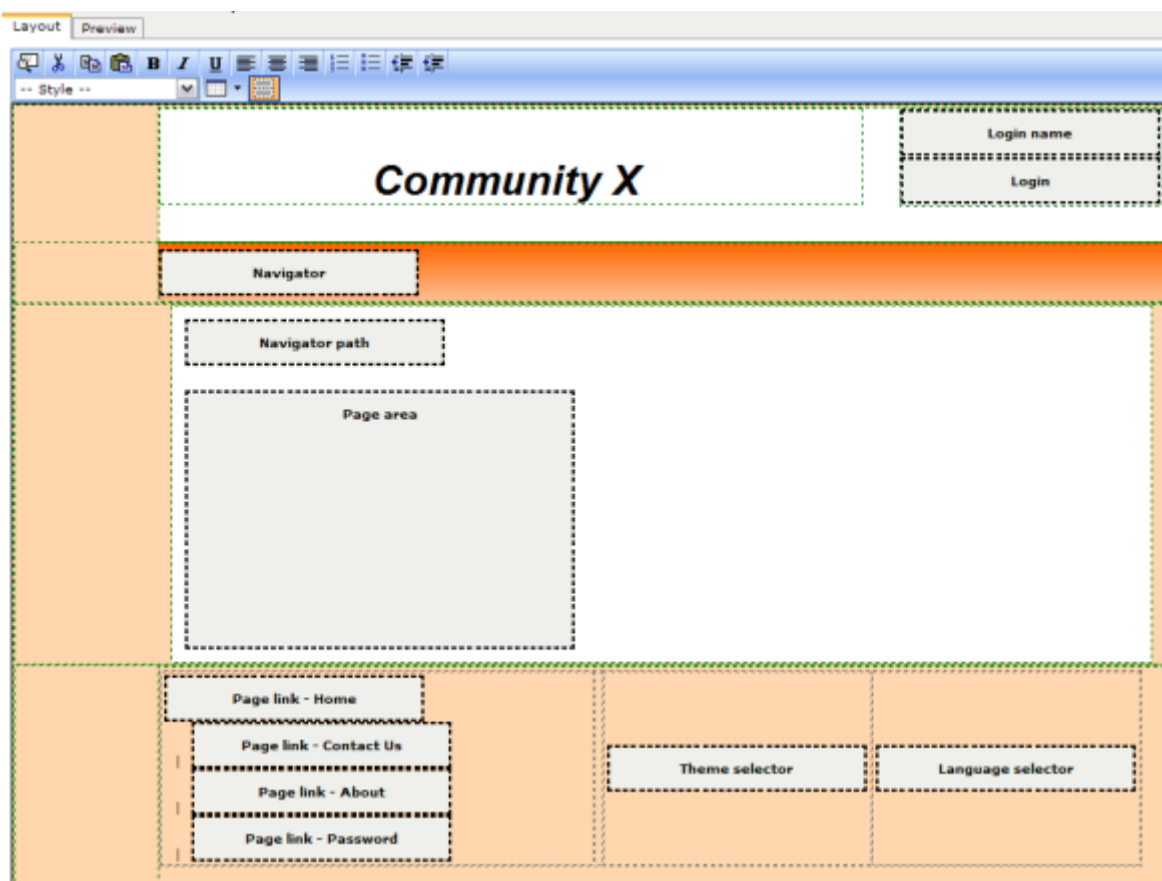


Figure 571 Example of a page layout



Figure 572 The page created by the layout above

17.14.4.4.3. 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.

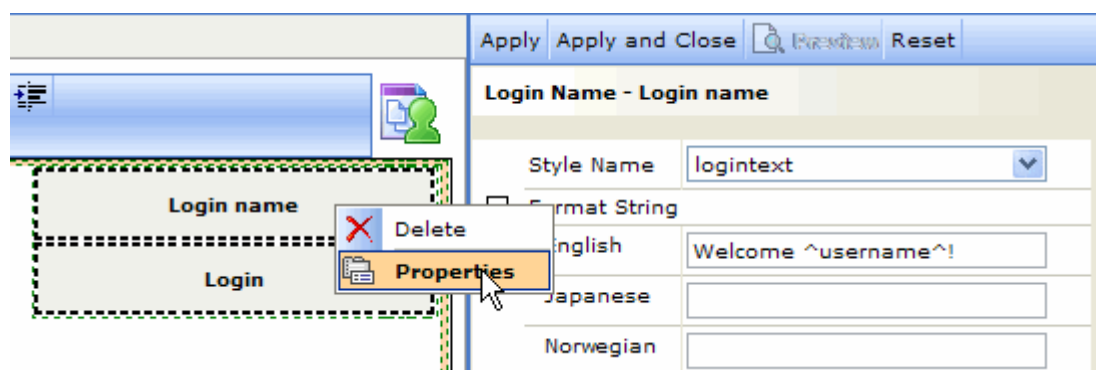


Figure 573 Setting the Login name properties

17.14.4.4.4. 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.

17.14.4.4.5. 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.

17.14.4.4.6. Change Password

This element allows the panelist to change his or her password at any time.

17.14.4.4.7. Navigator and Navigator Path

The Navigator element determines where on the page the menu is displayed. The Navigator path displays the history of pages visited.



Figure 574 Navigator and Navigator path

17.14.4.4.8. Language selector

The Language Selector element enables the panelists and other visitors to your portal to choose their portal language.

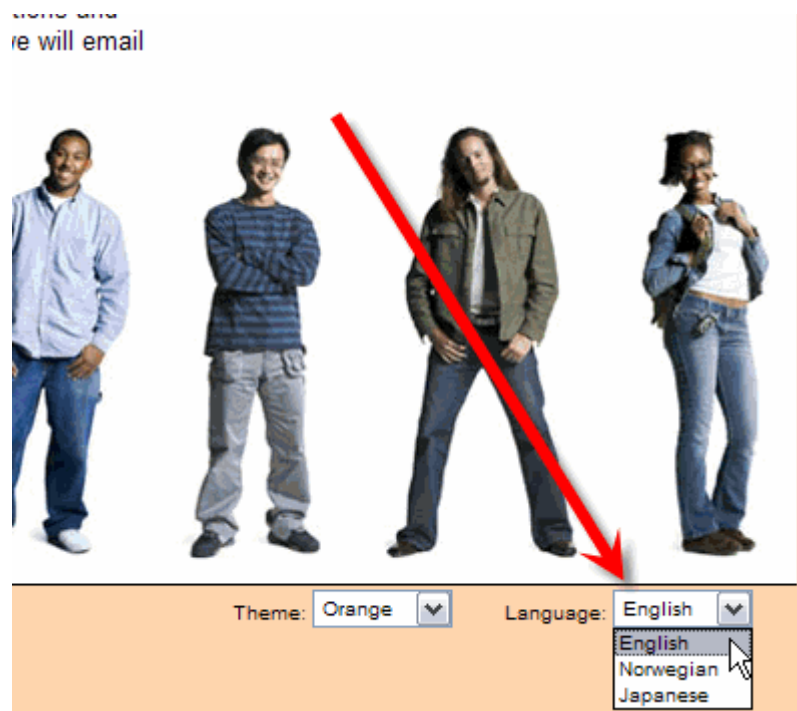


Figure 575 Example of the Language Selector element in use

17.14.4.4.9. Theme selector

Use a Theme Selector element to allow the panelists and other visitors to your portal to choose among the themes set up in the portal (see the Themes section on page 451 for more information).

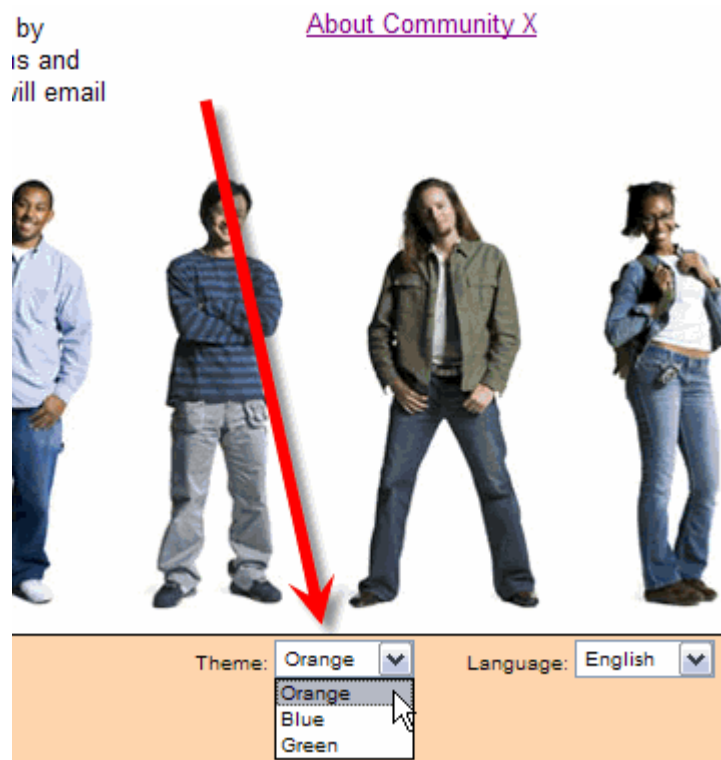


Figure 576 Example of the Theme selector in use

17.14.4.4.10. 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.

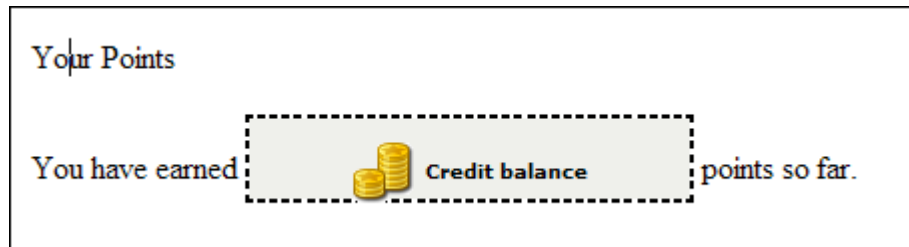


Figure 577 Example of using the Credit Balance element

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".

17.14.4.4.11. Edit Profile Link

Your panelists should have the opportunity to change their profile. 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 when you next time sample the panel for respondents to a particular survey, the group of respondents found for that survey are optimized. An example could be that when a panelist turns 30, they must have the opportunity to update the age question in their profile.

The registration survey will appear where the “Edit profile” element is placed.

From the respondent's end, Peter Jones (here with username: PeterJ) is logged in (see the upper right corner).

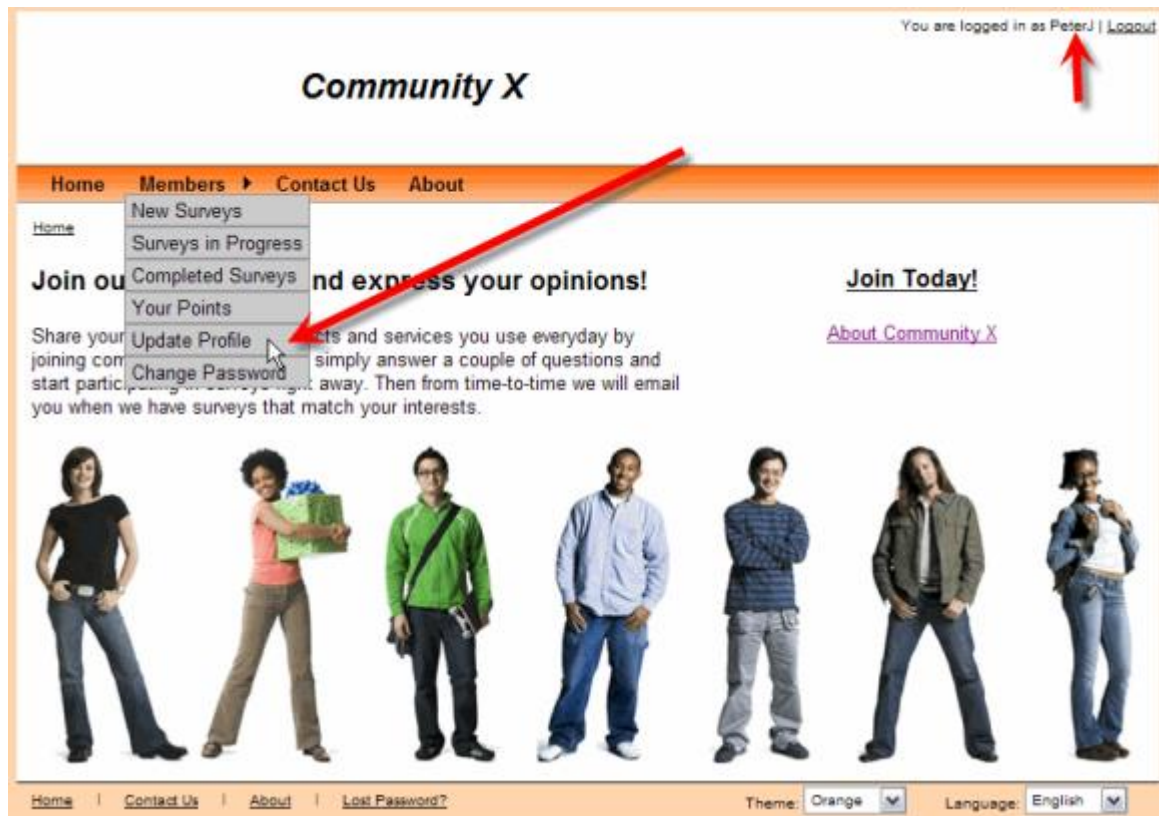


Figure 578 A respondent updates his profile

When he goes to the **Members > Update Profile** menu command, he is taken to the portal page shown in the figure below. The Page Master for this page is "Main PM" (see the Page Masters section on page 450 for more information) so the portal page opens neatly inside the Community Portal look-and-feel.

You are logged in as PeterJ | [Logout](#)

Community X

[Home](#) [Members](#) ▶ [Contact Us](#) [About](#)

[Members](#) > [Update Profile](#)

Update Profile

Please enter your name

Please enter your email address

Your gender

☒ male

☐ female

Your age

☐ Below 20

☐ 20 - 29

☒ 30 - 39

☐ 40 - 49

☐ 50 or above



[Powered by Confirmit](#)



[Home](#) | [Contact Us](#) | [About](#) | [Lost Password?](#) Theme: Orange Language: English

Figure 579 A respondent updates the panel survey (his profile)

17.14.4.4.12. 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.

17.14.4.4.13. Text

The Visual Element “Text” is used to display text on a portal page. You can enter text directly onto a page (see the Free-form Text section on page 479 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 specify the text for each language, and Confirmit will display the text in the language chosen by the panelist via the Language Selector (see the Language selector section on page 461 for more information)

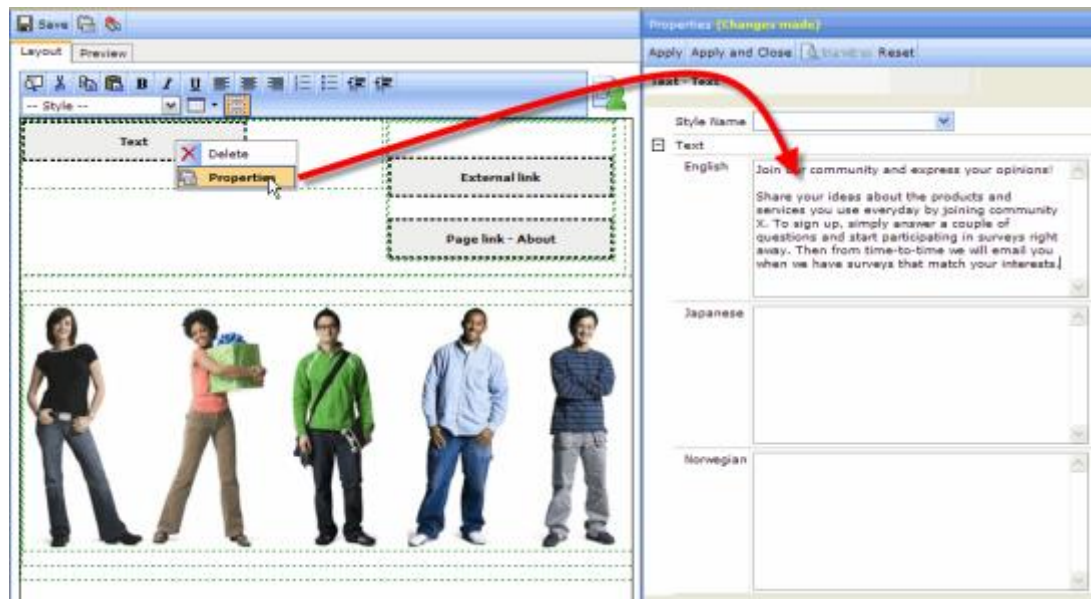


Figure 580 Language transparent text element

17.14.4.4.14. Page Link

In addition to the Visual Components, you can drag a page directly onto another page to make a direct “go to” page. Confirmit creates a hyperlink to the dragged page where the page was dropped. The panelist can click the hyperlink to navigate to that page.

In our example portal we are using direct “Page links” inside the Page Master. The four links in the bottom 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 (per language), and descriptions (per language).

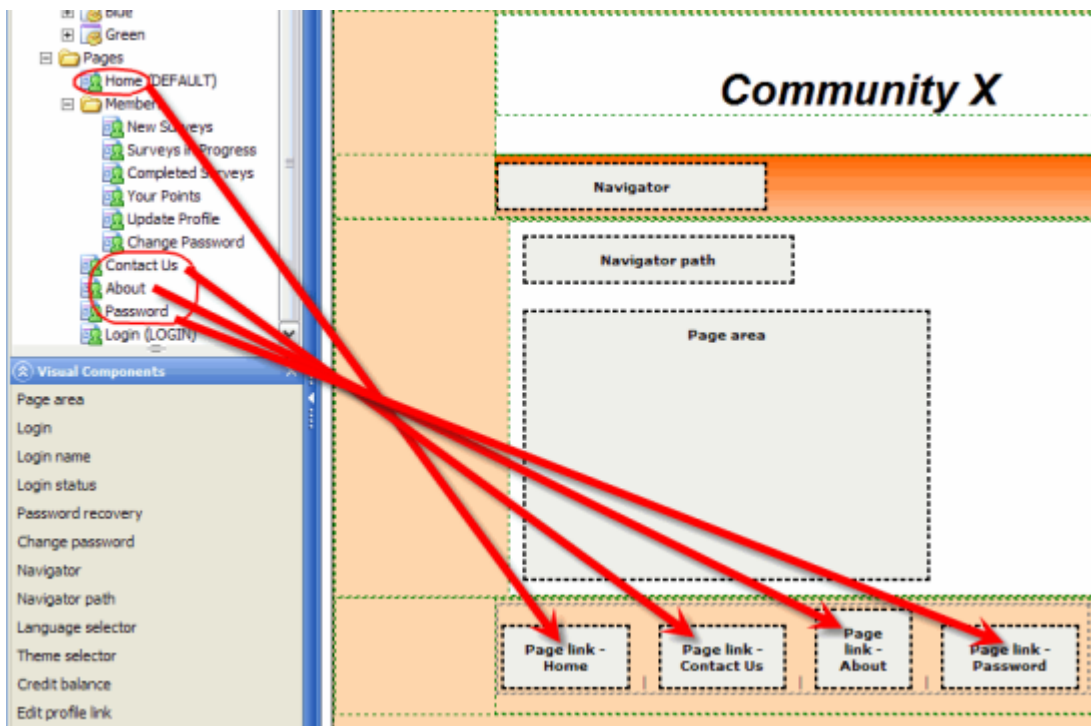


Figure 581 Example of Direct Page linking

17.14.4.5. Properties on a Community Portal

To open the portal Properties page, right-click on the portal name and choose **Properties**.

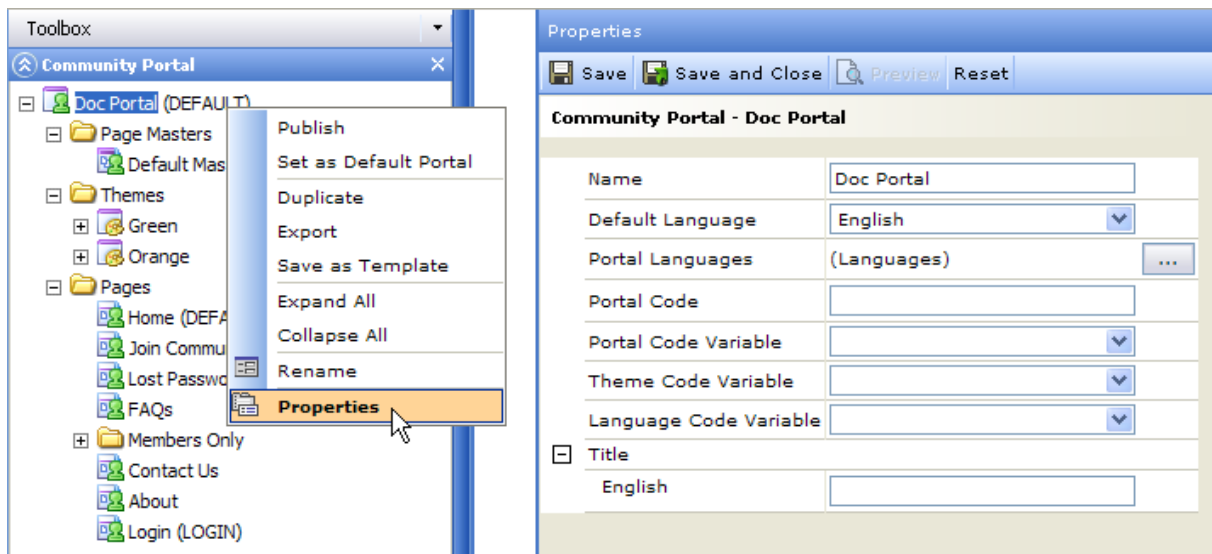


Figure 582 Properties on portal level

- **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 the Dynamic Portal, Theme and Language section on page 467 for more information).

17.14.4.6. Dynamic Portal, Theme and Language

You can have several community 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.

17.14.4.6.1. 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=pXXXXXXXXX&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=pXXXXXXXXX&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 the APPENDIX B: CONFIRMIT LANGUAGE CODES section on page 609 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=pXXXXXXXXX&l=9
```

These three codes can also be used in combination, for example:

```
http://survey.confirmit.com/communities/default.aspx?p=pXXXXXXXXX&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.

17.14.4.6.2. 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 community 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...

- Go to the Community Portal, right click on the portal name in the Community Portal toolbox and select **Properties**.

The Properties page opens.

Properties

Save Save and Close Preview Reset

Community Portal - Doc Portal

Name	Doc Portal
Default Language	English
Portal Languages	(Languages) ...
Portal Code	
Portal Code Variable	
Theme Code Variable	
Language Code Variable	
☒ Title	
English	

Figure 583 Selecting the Portal Code Variable

To select a portal for a respondent based on the respondent's answer to a variable:

- 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.

Community Portal - Doc Portal

Name	Doc Portal
Default Language	English
Portal Languages	(Languages) ...
Portal Code	
Portal Code Variable	
Theme Code Variable	Age
Language Code Variable	Country
☒ Title	
English	

Figure 584 Selecting a variable from the drop-down list of those available in the attached Community Panel

The drop-down list will include all the suitable variables currently included in the Community Portal to which the portal is attached. Note that the Community Portal's database must be generated for new variables to be included.

- Type into the Portal Code field the code of the answer, that you wish to use to call this portal.

Community Portal - Doc Portal	
Name	Doc Portal
Default Language	English
Portal Languages	(Languages) ...
Portal Code	1
Portal Code Variable	Country
Theme Code Variable	
Language Code Variable	
☐ Title	
English	

Figure 585 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),

17.14.5. Managing your Community Portals

You can create as many Community 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.

17.14.5.1. Publish your Community Portal

You can have as many Community 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 > Community Portals** menu command.
3. In the Community Panels List, click on the required community portal to open the Community Portal Designer window for that portal.
4. Right-click on the portal name in the Community Portal toolbox, and choose **Publish** from the drop-down menu and then confirm the operation in the Publish Community Portal overlay.

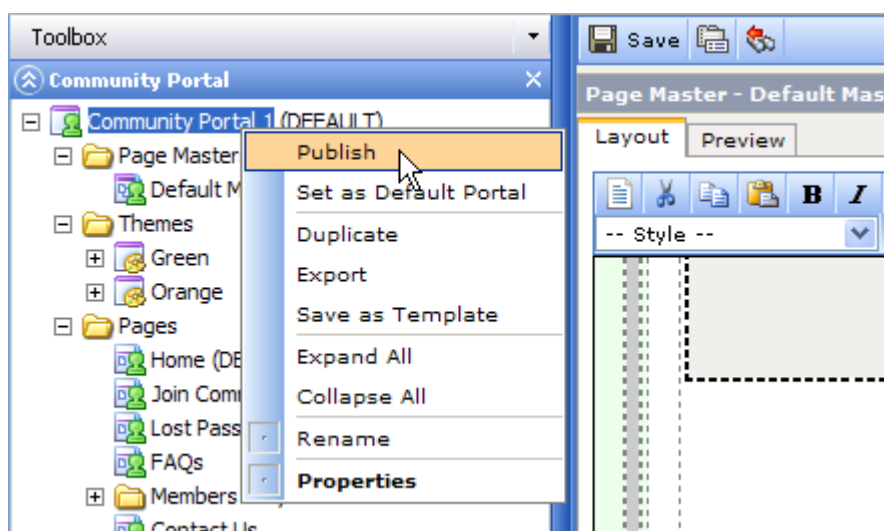


Figure 586 Publishing the portal

When you publish a portal, this will be the one used then people click the Community Portal URL (the link will be available from the Project 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.

17.14.5.2. Testing your Community Portal

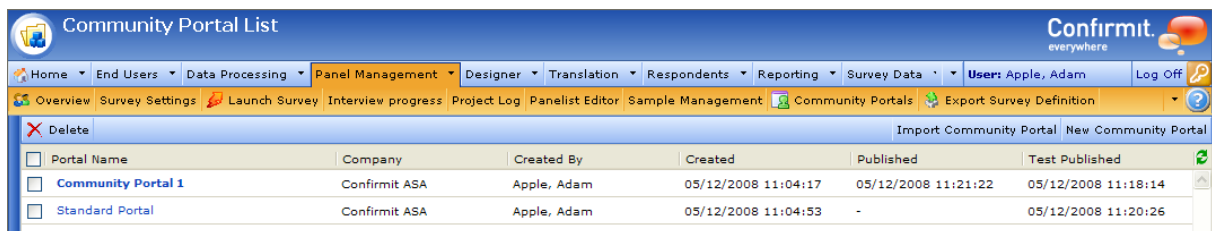
When working with your portals, you will often need to test how different portals function together with your panel. We recommend having all relevant portals added to the panel, and then in preview try the different alternatives. If you need to make changes to a portal to for example try a different 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.

17.14.5.3. Managing your Community Portal within your Panel

Go to the **Panel Management > Community Portals** menu command.

Confirmit displays a list of all portals added to the active panel.



Portal Name	Company	Created By	Created	Published	Test Published
Community Portal 1	Confirmit ASA	Apple, Adam	05/12/2008 11:04:17	05/12/2008 11:21:22	05/12/2008 11:18:14
Standard Portal	Confirmit ASA	Apple, Adam	05/12/2008 11:04:53	-	05/12/2008 11:20:26

Figure 587 Example of a list of a panel's active portals

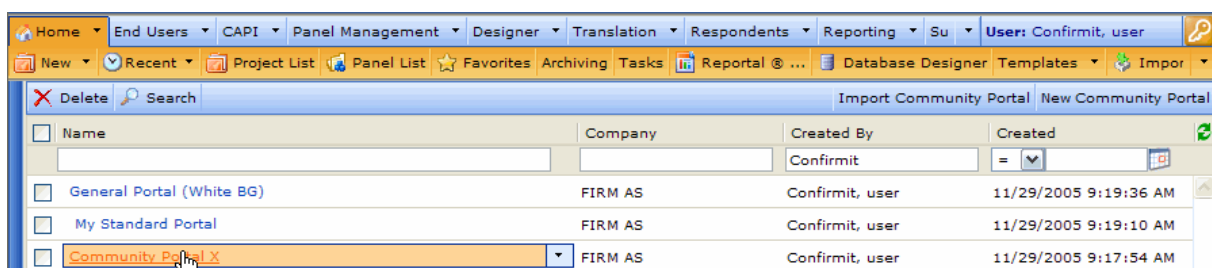
The list shows when each portal was created and by whom. The currently published portal for the panel's production database is listed in bold, and the time when the portal was last published is also shown. The "Test Published" column shows when the portal was last published on the Test database.

17.14.5.4. Managing your Community Portal Templates

The same Community Portal can be used on many different panels simultaneously. Whenever you save a portal as a template (see the Save as Template section on page 472 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 Community Portal templates, go to the **Home > Templates > Community Portal** menu command.

Confirmit lists all the Community Portal templates. These are global versions (templates), which can be added to one or more panels.



Name	Company	Created By	Created
General Portal (White BG)	FIRM AS	Confirmit, user	11/29/2005 9:19:36 AM
My Standard Portal	FIRM AS	Confirmit, user	11/29/2005 9:19:10 AM
Community Portal X	FIRM AS	Confirmit, user	11/29/2005 9:17:54 AM

Figure 588 Example of the Community 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.

17.14.5.4.1. 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**.

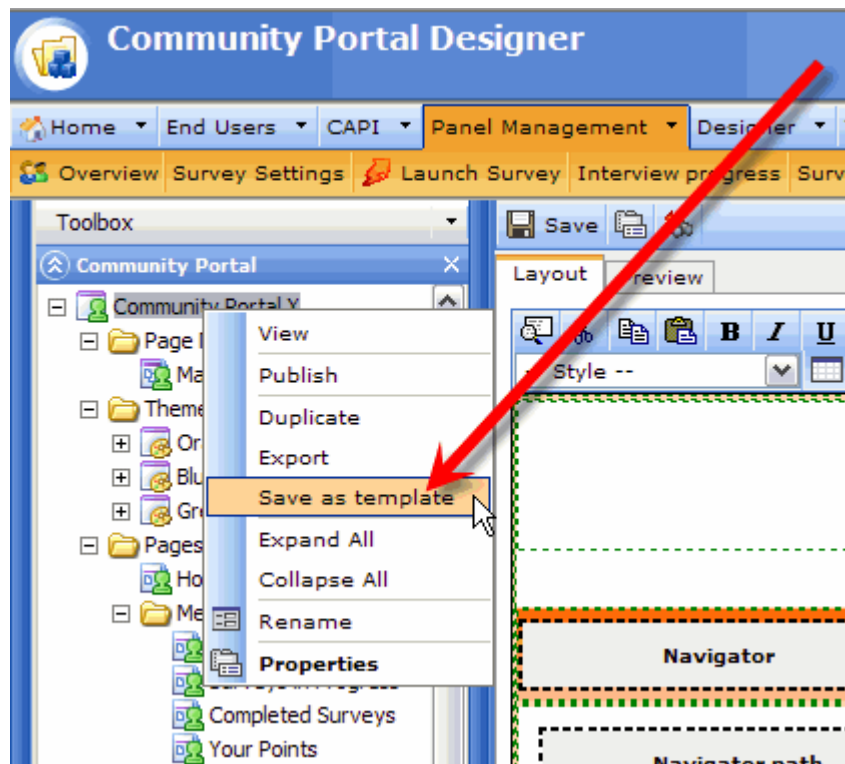


Figure 589 Saving a portal as a template

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.

17.14.6. Editing your Page Masters and Portal Pages

Note: Confirmit is not installed on your computer locally like an application such as MS PowerPoint 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 table or 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 use HTML tables. A page can consist of one table, or a combination of tables within tables. You then place the different Visual Components (page elements) you want to use inside the appropriate table cell. You can also insert images inside the cells of these tables.

Alternatively, you can specify each Visual Component's position and layout by using style settings (CSS) (see the Styles section on page 451 for more information).

17.14.6.1. 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.

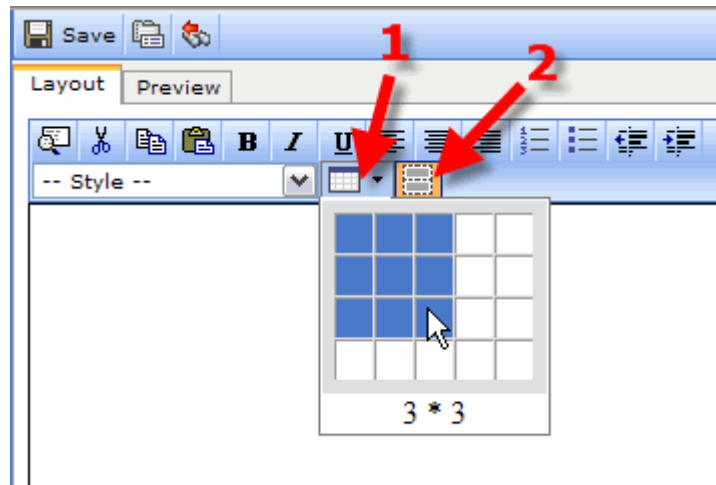


Figure 590 Creating an HTML Table

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).

17.14.6.2. 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.

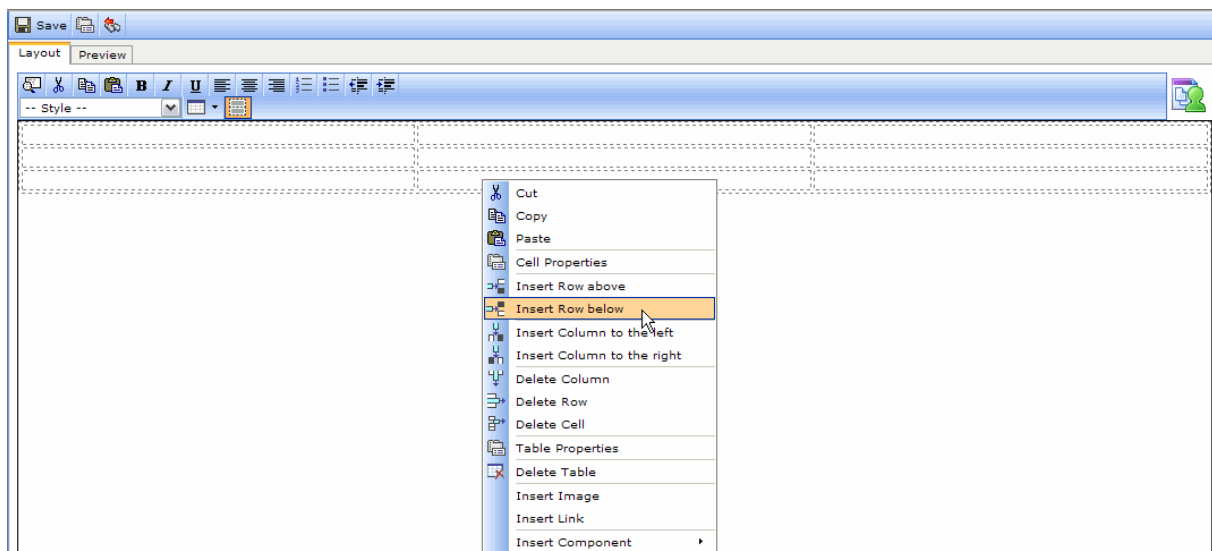


Figure 591 Adding rows and columns to a table

17.14.6.3. 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.

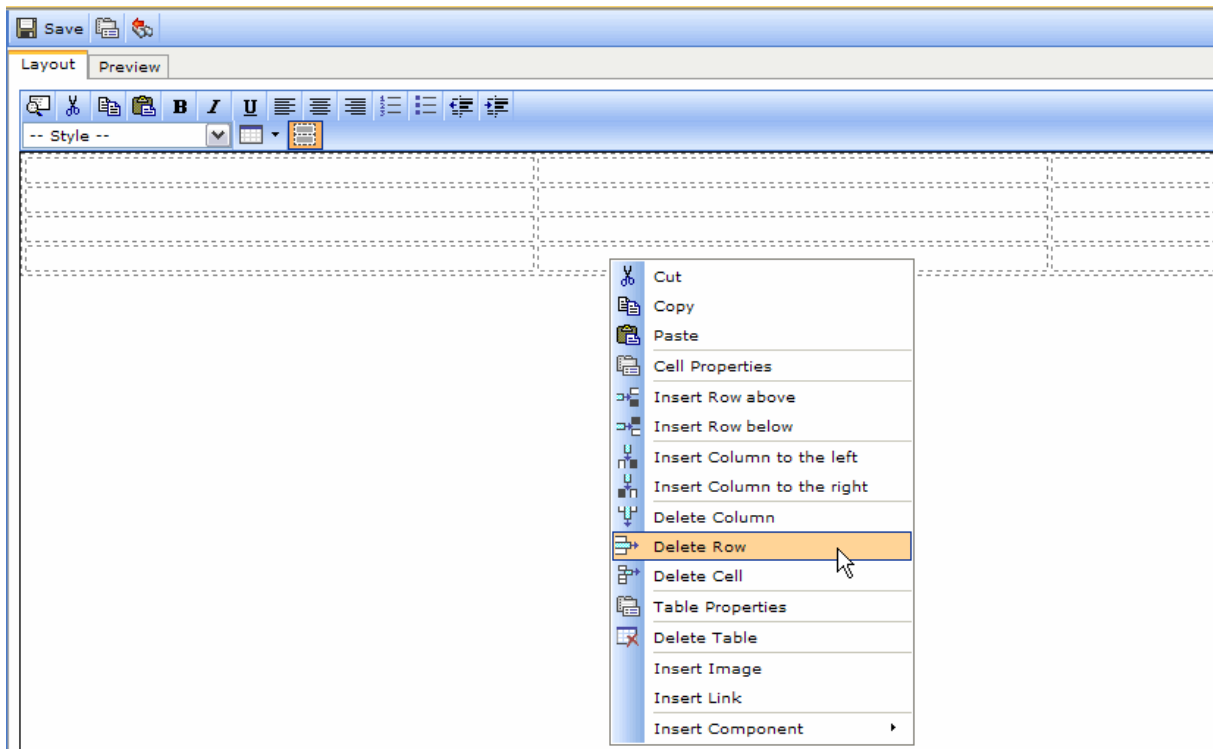


Figure 592 Deleting a cell, row or column

17.14.6.4. Table Properties

1. To open the Properties for a table, right-click anywhere in the table and select **Table Properties**.

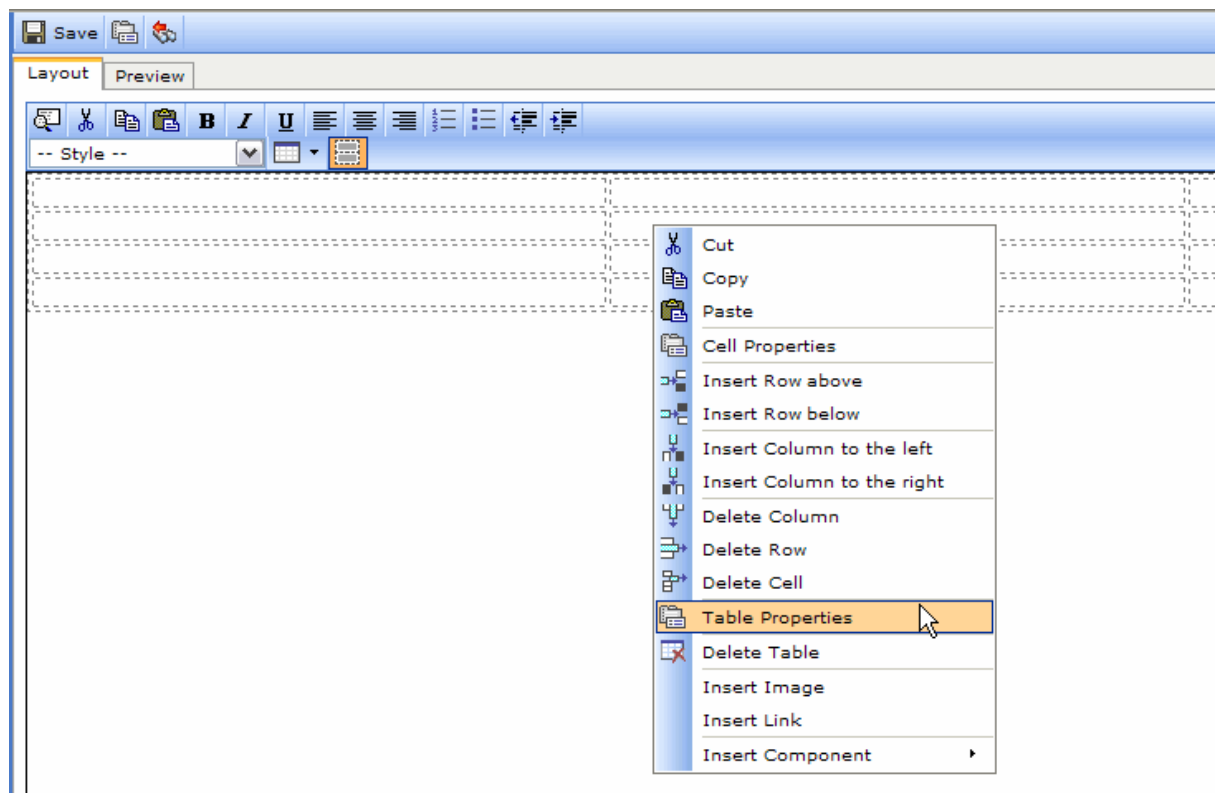


Figure 593 Opening the Table Properties window for a table

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**.

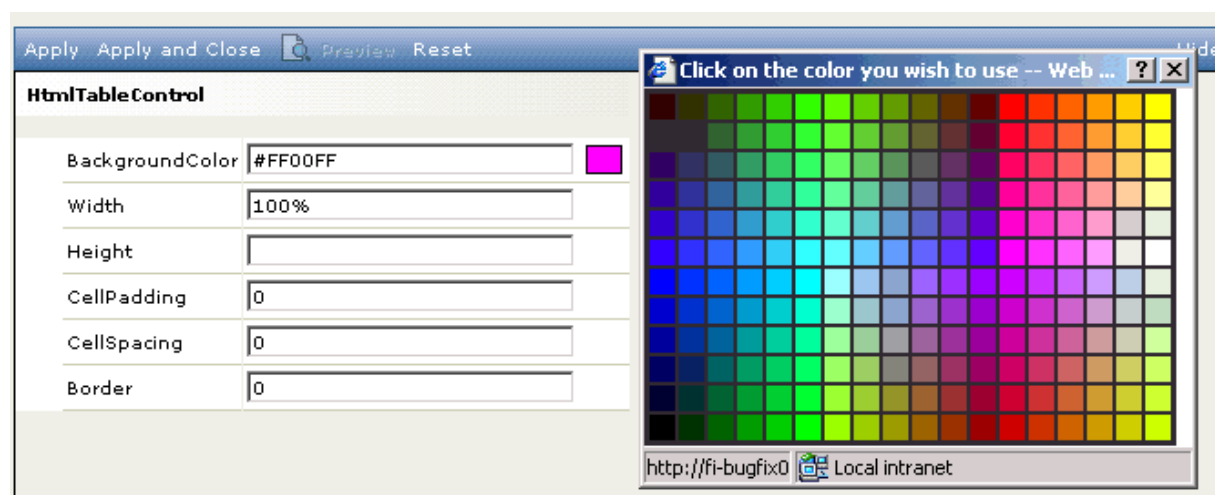


Figure 594 Editing the Background Color

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.

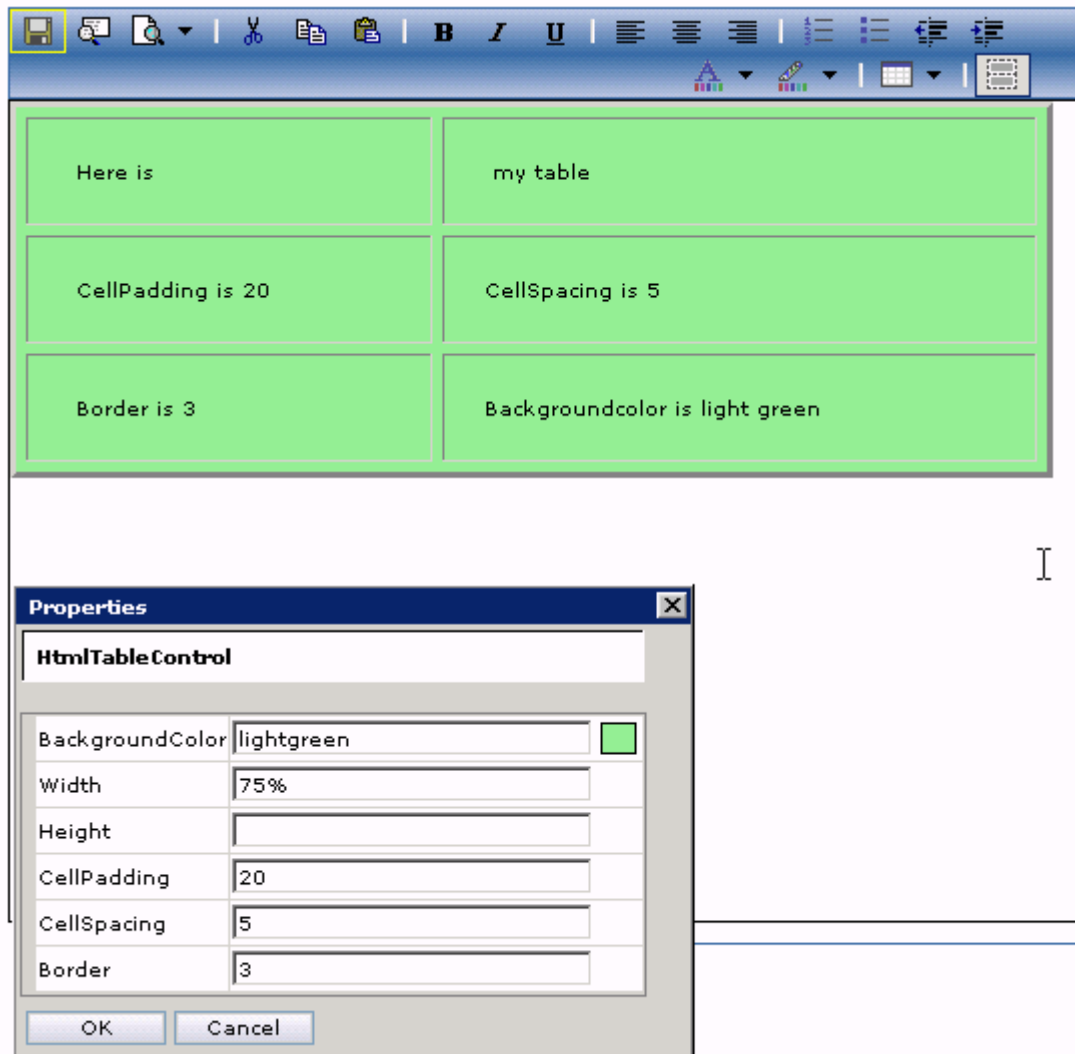


Figure 595 More table settings

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.

17.14.6.5. Cell Properties

To alter the cell properties, right-click the cell you want to edit and choose **Cell Properties** as shown below.

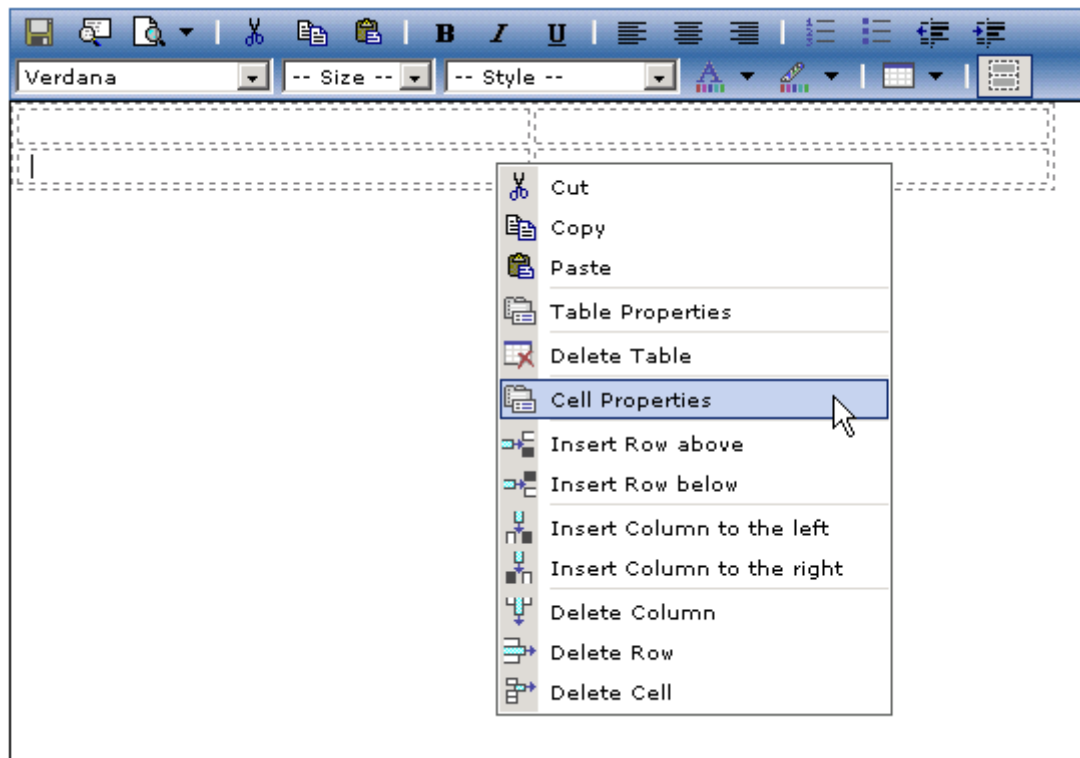


Figure 596 Opening the Cell Properties pane

The property box shown below appears.

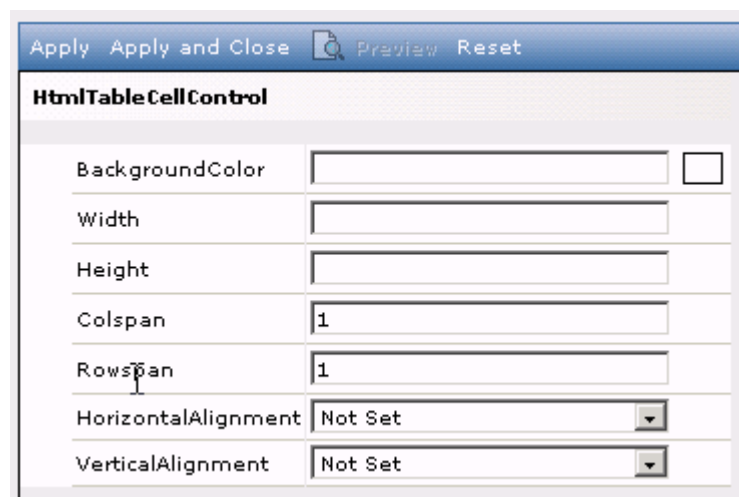


Figure 597 The Cell Properties pane

You can change the **background color**, **width**, and **height** using the same methods as for the table (see the Table Properties section on page 474 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:

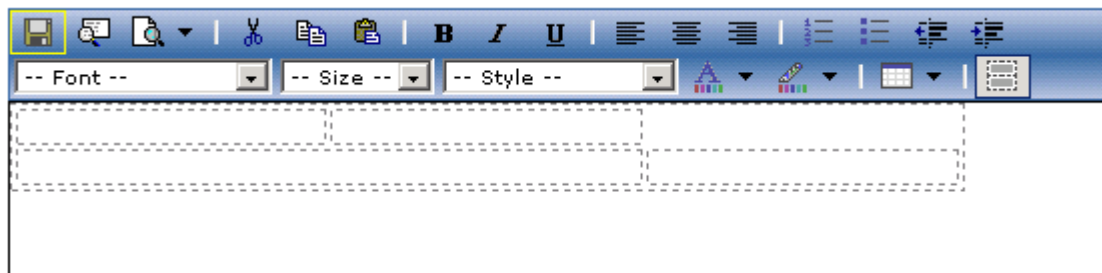


Figure 598 Colspan is set to 2 in the lower-left cell. This pushes the lower-right cell into a third column.

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.

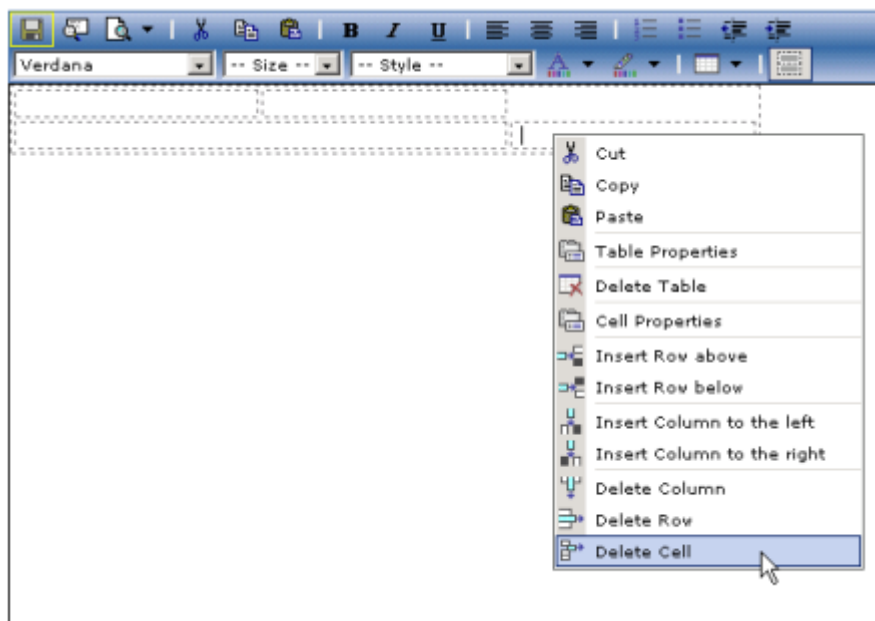


Figure 599 Deleting a cell

The resulting table appears as shown below.

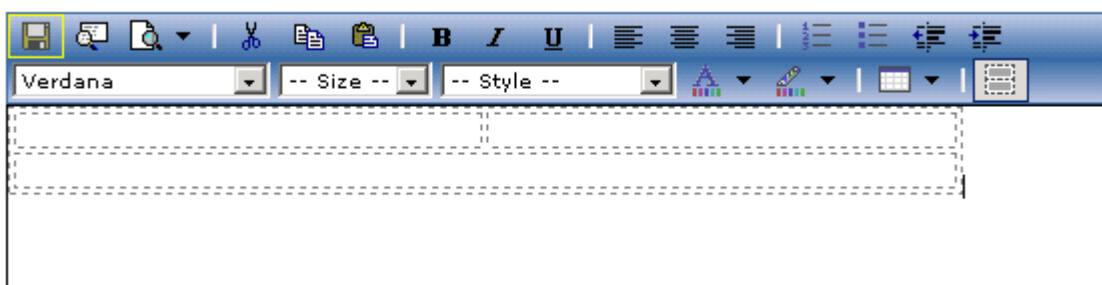


Figure 600 Merged cells

17.14.6.6. 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.

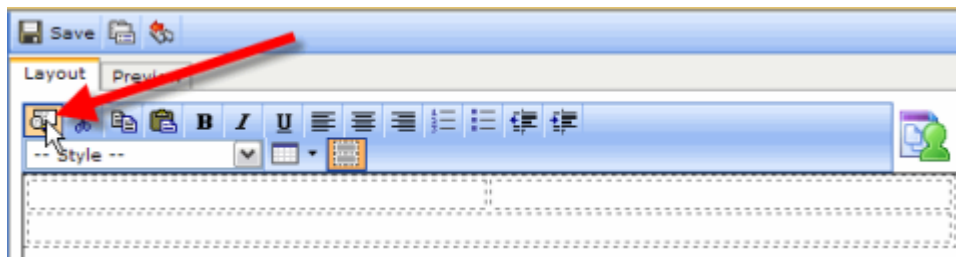


Figure 601 Switching modes

The figure below shows the table in HTML mode. To switch back to WYSIWYG mode, click the same button again.

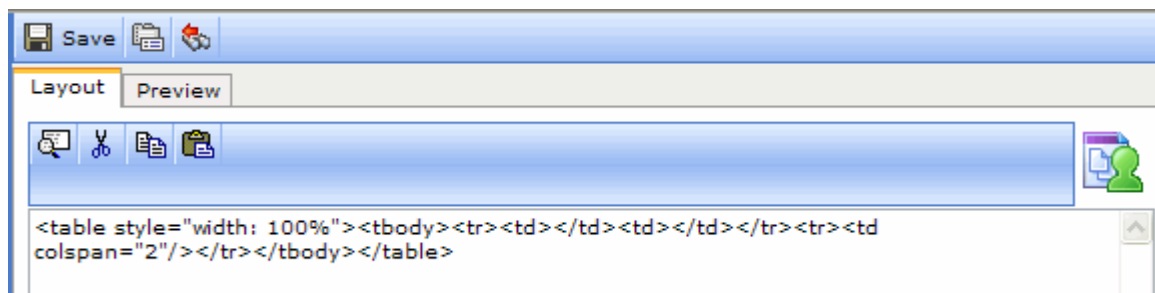


Figure 602 Example of the table definition in HTML mode

Note: When working in HTML mode, do not alter or remove the code that refers to Visual Components (page elements).

17.14.6.7. Free-form Text

You can type free-form text on a portal page. To do this, enter text directly into any table cell. You can also copy-and-paste text into the table cells. To further edit (format) your text, you can use the button options in the text-editing toolbar shown in the figure below.

Note that common keyboard shortcuts can be used; for example **CTRL+B** for bold, **CTRL+U** for underling, **CTRL+I** for italic etc. **Enter** inserts a paragraph break (<p></p>) 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.

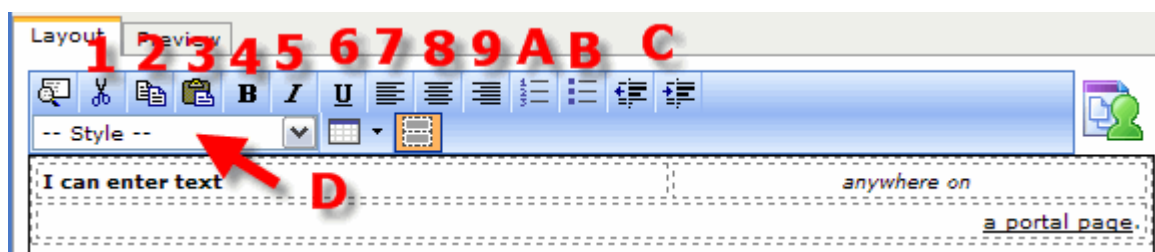


Figure 603 The formatting tools for free-form text

Key:

1 – Cut	2 – Copy	3 – Paste	4 – Bold	5 – Italics
6 – Underline	7 – Left	8 – Center	9 – Right	A – Num list
B – List	C – Indentation	D – Choose style		

17.14.6.8. Images

You can insert images/pictures directly onto a portal page.

- If you are in HTML mode (see the HTML Mode section on page 478 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.

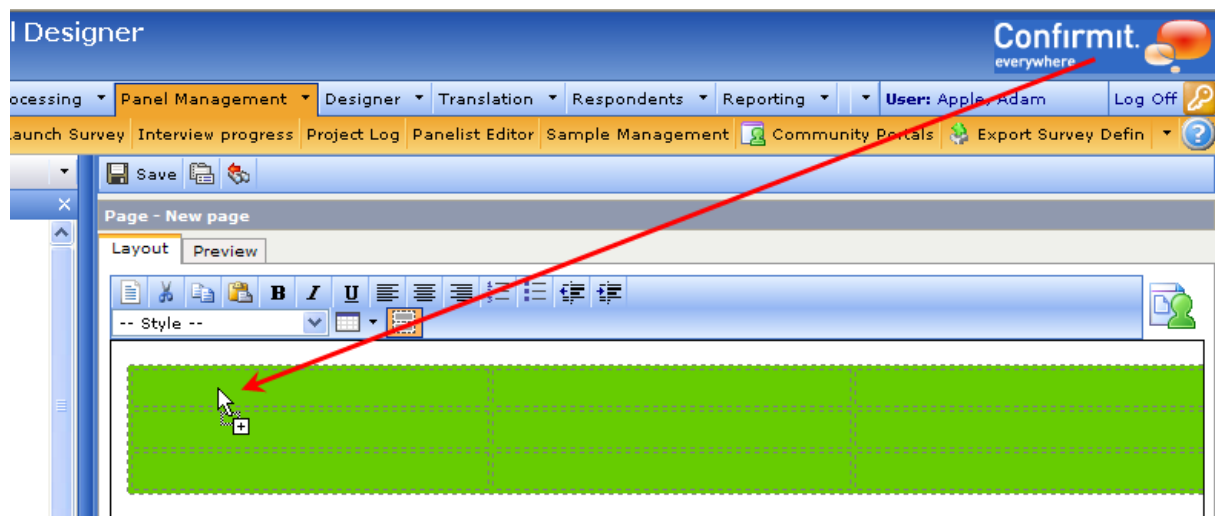


Figure 604 Dragging and dropping an Image onto a page

When the image is dropped, the page will look as shown below.

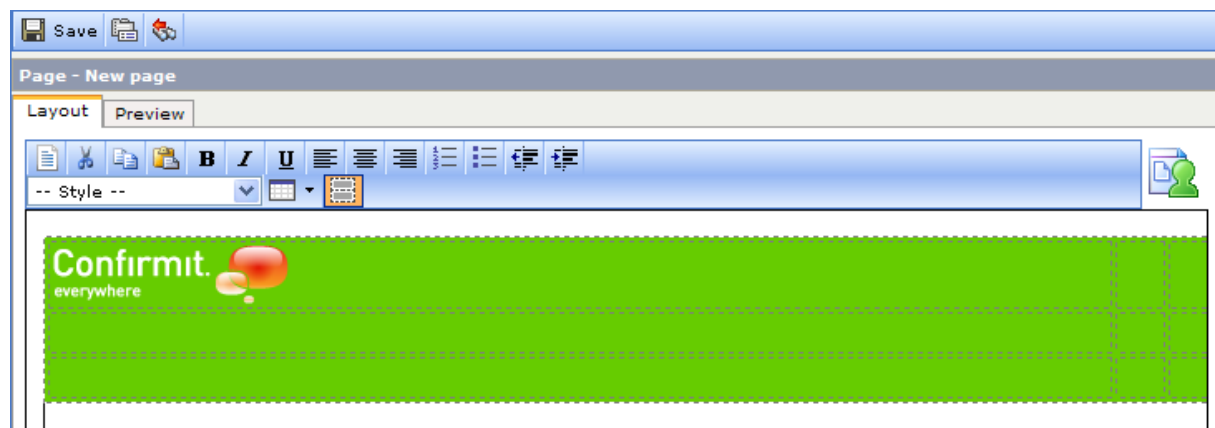
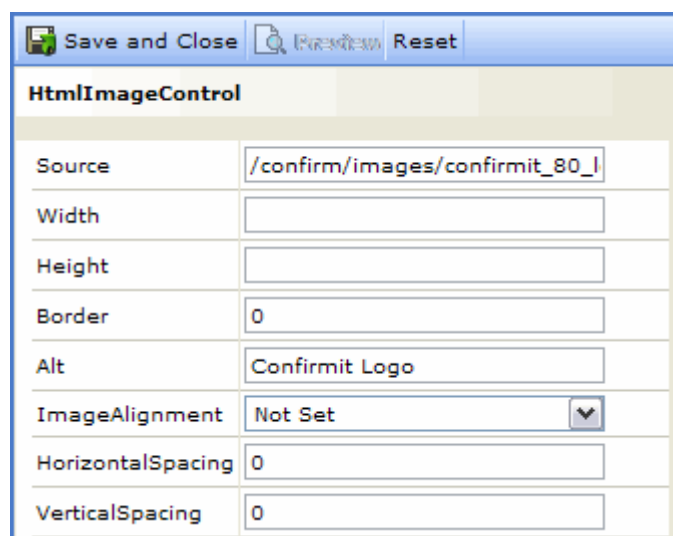


Figure 605 The page with the image inserted

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.



HtmlImageControl	
Source	/confirm/images/confirmit_80_I
Width	
Height	
Border	0
Alt	Confirmit Logo
ImageAlignment	Not Set ▼
HorizontalSpacing	0
VerticalSpacing	0

Figure 606 The image properties

18. 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.

18.1. 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 User Guide.

18.1.1. 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 the Quotas section on page 252 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.

18.1.2. 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 User Guide.

18.1.3. 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.

18.1.4. 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.

18.1.5. 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.

18.1.6. 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.

18.1.7. 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.

18.2. How to Create a CATI Project

The questionnaire for a CATI project is created in the same way as any other project. When you are ready to launch the project:

1. Go to the **Project Management > Survey Settings** menu command.
2. Check the CATI Survey box.

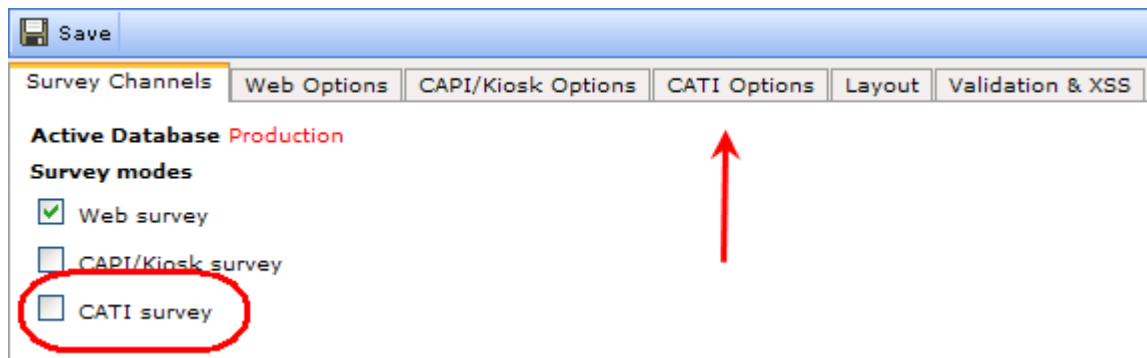


Figure 607 The Survey Settings page

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 The General Tab section on page 184 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.

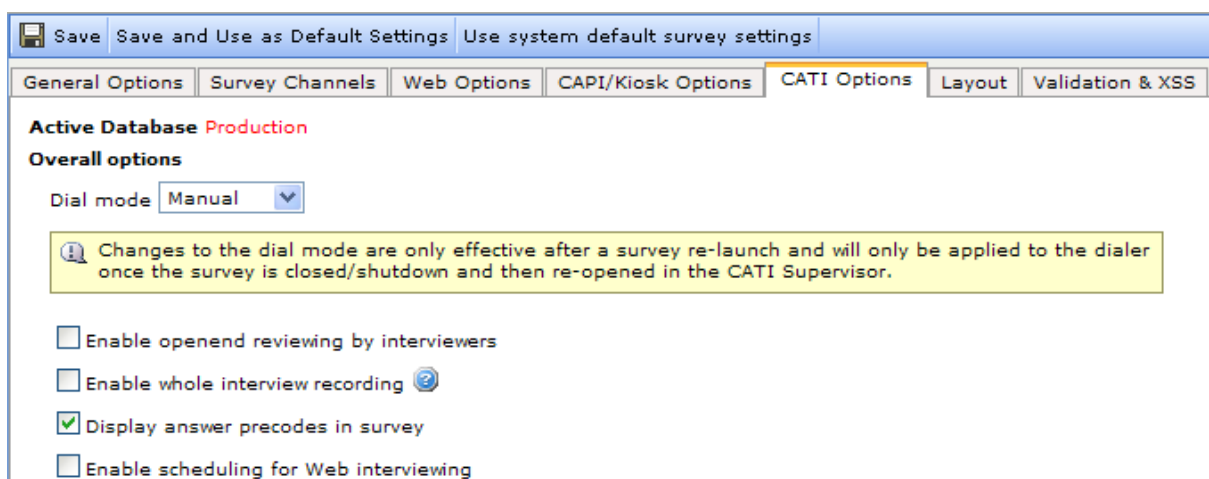


Figure 608 The CATI Options tab

3. Select the desired options (see the The CATI Options Tab section on page 364 for more information) and save the settings.
4. Launch the project.

Note: A CATI project can only be launched in the Production mode; there is no Test mode available for CATI.

On completion of the task, the link to the complied survey will be available on the Overview page in the normal manner.

19. The Online Coding Tool

Note: For some customers, the Online Coding Tool is a chargeable Add-On.

Note: This functionality will be available for projects 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.

19.1. 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 609 Example of respondent answers for the open-text question before coding

Important Criteria

Which are the most important criteria for you when considering purchasing a new car?

	Important Criteria					
	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 610 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.

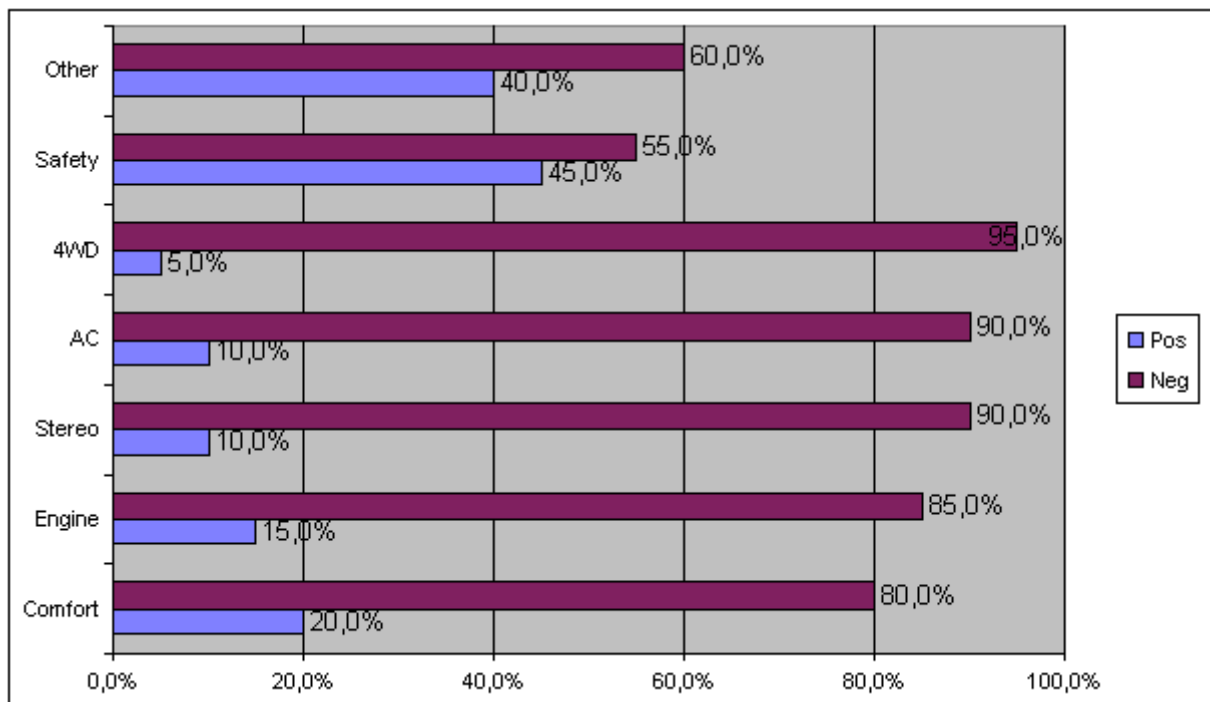


Figure 611 This Chart was produced using open-text answers after the online coding was complete

19.2. 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 the One Single or Multi for Each Open Text section on page 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 the Locking the Questions for Coding section on page 491 for more information).
- The main windows of the coding system are:
 - o The Administrative Online Coding Window is available to users with the Administrative 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.
 - o The Online Coding tab is available to users with the Code Opentext permission for the survey. The coder can choose an open-text question and code its answers (see the The Coding Window section on page 496 for more information).

19.3. 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 project.

1. Add the single/multi question in the normal way by dragging a new single or multi question into the Questionnaire Tree.

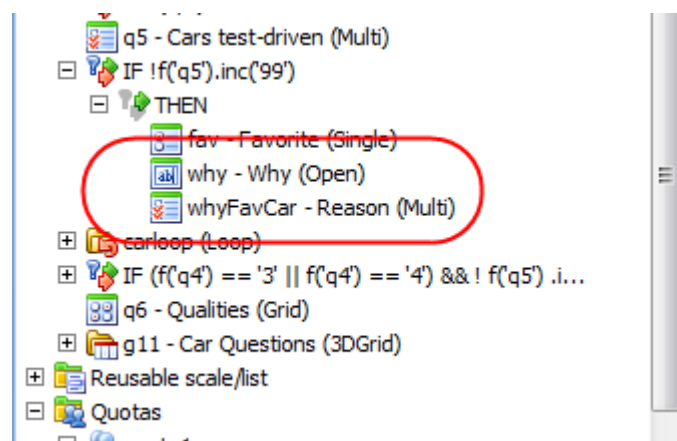


Figure 612 A Multi question for online coding

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.

The screenshot shows the Confirmit 16 Authoring User Guide interface. On the left, there's a 'Text' tab with a table of predefined questions. The table has columns: English, Code, RdgMulti%, and BgColor. The rows are: a, 1, [checkbox], b, 2, [checkbox], c, 3, [checkbox]. Below the table is a 'Scratchpad' area. On the right, the 'Properties' window is open for a 'Multi Question - (whyFavCar)'. The 'General' tab is selected, showing various settings. The 'Opentext coding' checkbox is checked. The 'Answer list display order' is set to 'In order'. The 'Group display order' is set to 'In order'. The 'Variable type' is set to 'Normal'. The 'Question Skin' is set to 'Normal'. The 'Answer required' checkbox is checked. The 'Read only' checkbox is checked. The 'Force number of items' is set to 'Equal to'. The 'Min' and 'Max' values are set to 1 and 3 respectively. The 'Question category' is set to 'Why Fav Car'. The 'Exclude translation' checkbox is checked. The 'Deleted' checkbox is checked. The 'No cleaning on question masking' checkbox is checked.

Figure 613 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 614 How to fill in the "coding of" field of single/multi questions defined for online coding

19.4. Object Permissions

The project 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 project.
2. Go to the **Project 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 project.

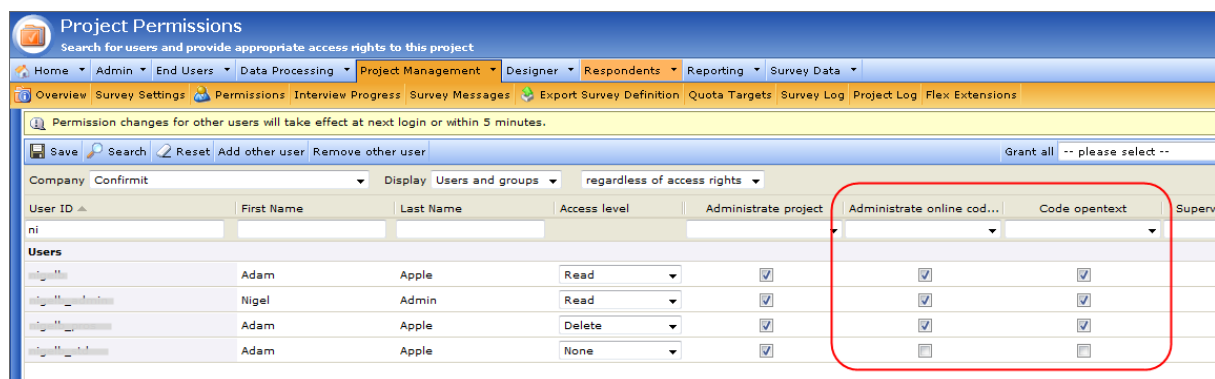


Figure 615 Example of the Permissions page

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.

19.5. 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.

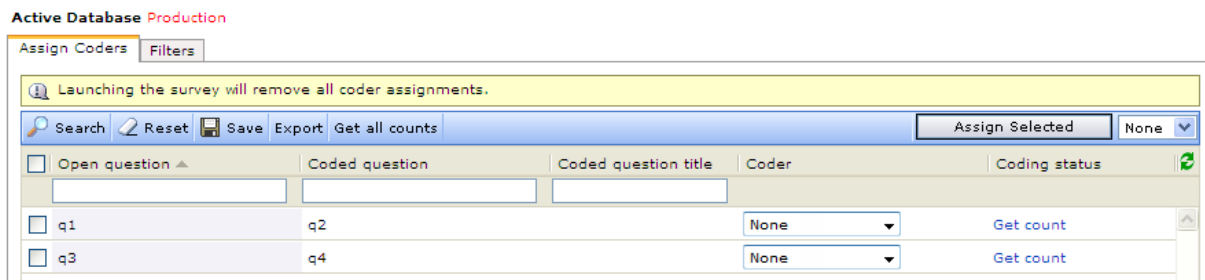


Figure 616 The Assign Coders tab of the Administrate Online Coding window

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 project, appears (see the Object Permissions section on page 491 for more information).

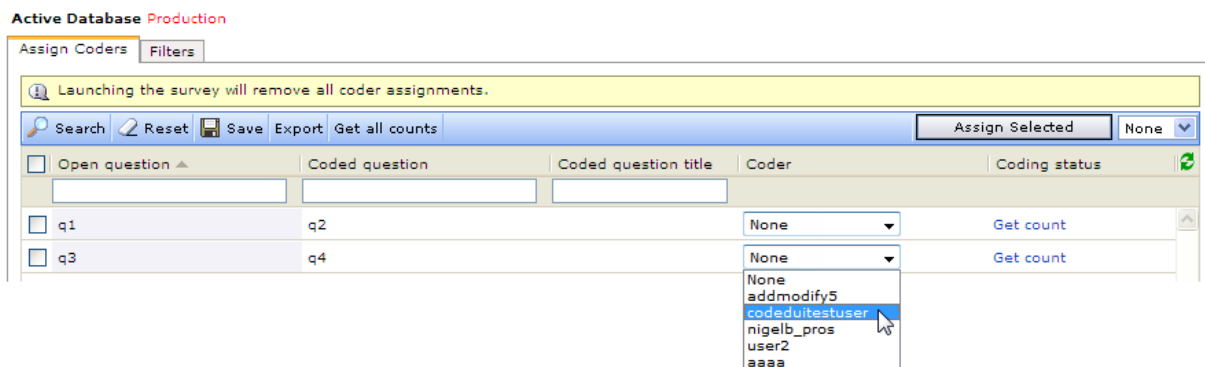


Figure 617 Selecting a coder to work on a question

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.

19.6. 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 project are listed.
2. Click the **New Filter** button located towards the right side of the Filters tab toolbar.
The New Filter overlay appears.

New Filter

Save Save and Close Save, Activate and Close Close

Filter name

Interview status filter

☐ Complete Responses ☐ Incomplete Responses ☐ Screened ☐ Quota Full ☐ Error

☒ All (unfiltered)

Expression

Search:

age - Age
ageNum - Age
carsTested - Cars Test-Driven
dept - Department
dob - Date of Birth
fav - Favorite Car
gender - Gender
name - Name
opinion - Opinion
prices - Car Prices
qual1 - Qualities I
qual2 - Qualities II
qual3 - Qualities III
rank - Ranking
salary - Salary

Expression
Add to expression Validate Clear

Operators
☐ And
☐ Or
☒ None
☐ Not

Variables
age

Functions
☒ ==
☐ <>
☐ >
☐ >=
☐ <
☐ <=

Value
Under 18 [1]
18 - 30 [2]
31 - 50 [3]
51 - 67 [4]
68 or more [5]

Figure 618 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:
 - o 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).
 - o Select the required Operator (the expression must begin with "None").
 - o Select the desired Variable, Function and Value.
 - o Click **Add to expression**. The selected items are added to the Expression field.

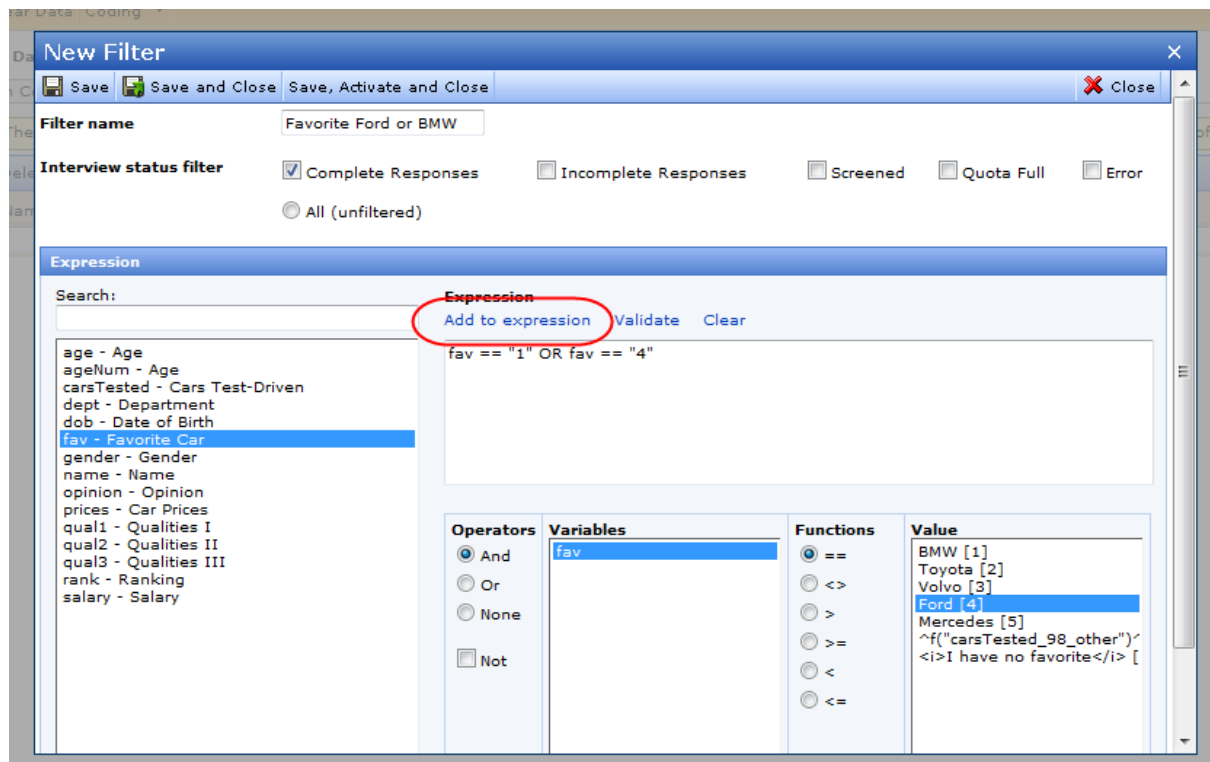


Figure 619 Creating the filter expression

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.

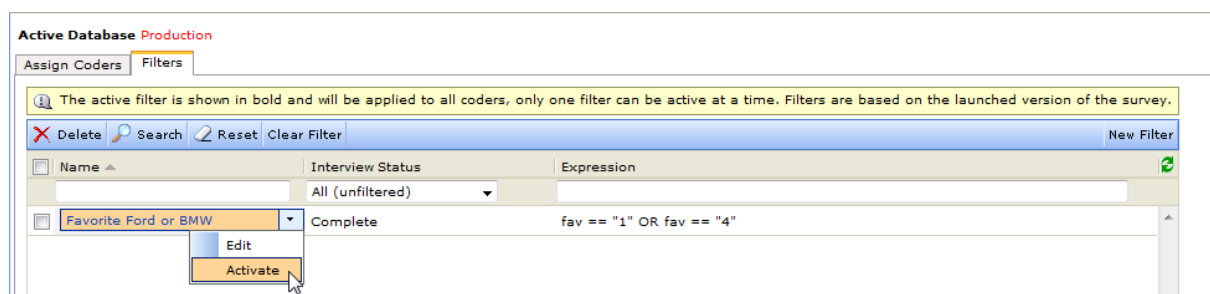


Figure 620 The new filter in the Filters tab list

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**.

19.7. 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 ProjectID, RespID, QuestionID and open-text information that satisfies the selected export filter. To do this:

1. Go to the **Survey Data > Coding > Administrative 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.

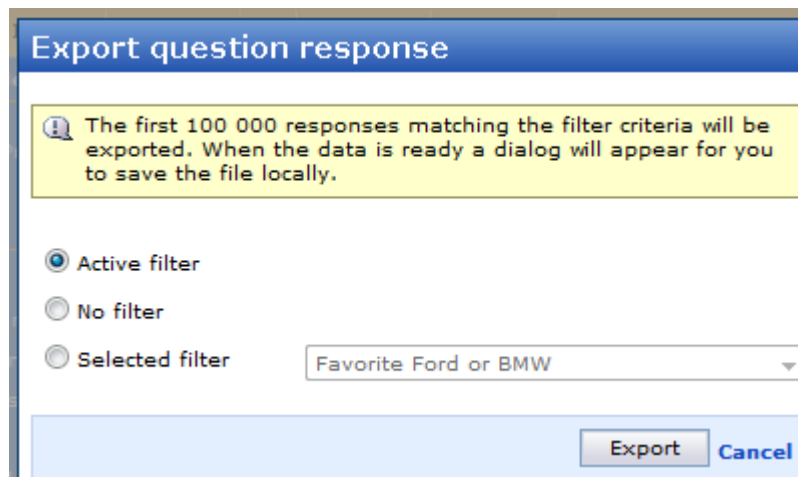


Figure 621 The Export question response overlay

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.

19.8. Entering Online Coding

Note: The Online Coding functionality is a chargeable add-on. In addition, special access permission is required to use it - refer to the Object Permissions section for details.

To enter the Online Coding module:

1. Select a project.
2. Go to the **Survey Data > Coding > Online Coding** menu command to perform coding of open-text questions.

Note: If you do not have the required access permission, the Online Coding command will not be available in the menu.

The Online Coding Tool window opens.

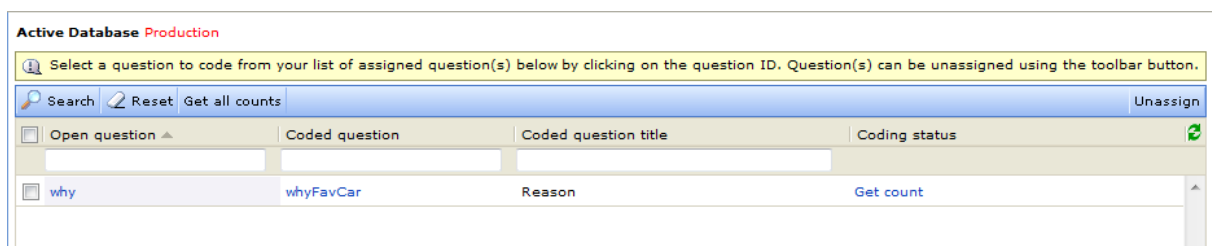


Figure 622 The Online Coding Tool window

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 > 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.

19.8.1. User Settings

To access the Online Coding specific user settings:

1. Go to the **Home > User Settings** menu command.

The User Settings window opens.

Figure 623 The User Settings window

The setting that is relevant for the Online Coding functionality is located towards the bottom of the 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**.

19.9. The Coding Window

After a question has been allocated to a coder (see the Locking the Questions for Coding section on page 491 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 project. 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 he wants to sort ascending or descending, and if he wants to see coded and/or un-coded questions.

The screenshot shows a web-based coding interface. At the top, there is a navigation bar with buttons: Back, Search, Reset, Save, Replace, with, Go, and Apply to filtered list. Below this, a header row displays: Coded Question ID: whyFavCar (Multi), Open Question ID: why, Question Text: Why is this car your favorite... [checkbox checked] Keep empty fields uncoded. The main area contains a table with columns: Response ID, Answer Text, Codes, Answers, and Coded Status. The table has three rows of data. To the right, there is a sidebar titled 'Answers' with a search bar and a list of three items: 1 a, 2 b, and 3 c.

Response ID	Answer Text	Codes	Answers	Coded Status
2				☐
3	ghn sdfn			☐
4	ioluyjfnfgb			☐

Figure 624 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.

19.9.1. Elements Within the Coding Window

19.9.1.1. 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.

19.9.1.2. Searching and Sorting

The central section of the coding window is for "searching and sorting" answers.

This screenshot is identical to the one in Figure 624, showing the coding window interface with the table of responses and the sidebar for answers.

Figure 625 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.

19.9.1.3. 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.

The screenshot shows the Confirmit coding interface. At the top, there are navigation buttons: Back, Search, Reset, Save, Replace, with, Go, and Apply to filtered list. Below these, the 'Coded Question ID' is 'whyFavCar (Multi)' and the 'Open Question ID' is 'why'. The 'Question Text' is 'Why is this car your...'. There is a checkbox for 'Keep empty fields uncoded' which is checked. The main area contains a table with columns: Response ID, Answer Text, Codes, Answers, and Coded Status. The table has three rows of data. The first row has Response ID 2, Answer Text, Codes, and Coded Status. The second row has Response ID 3, Answer Text 'ghn sdfn', Codes '1', Answers 'a', and Coded Status. The third row has Response ID 4, Answer Text 'iolyujnfgb', Codes, Answers, and Coded Status. To the right of the table is an 'Answers' frame with columns 'Code' and 'Text'. It contains three rows: 1 with code 'a', 2 with code 'b', and 3 with code 'c'.

Figure 626 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 project 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.

19.9.1.4. 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. The full list is divided into pages, with up to the specified "Coding Screen Size" on each page.

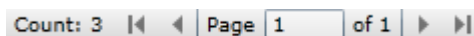


Figure 627 The Navigation buttons

The number of answers to be displayed in the coding window must be entered in the **Coding screen size** field in the user-defined menu (see the User Settings section on page 496 for more information). This feature allows the coder to specify how many answers he wants to display on the screen.

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.

19.9.1.5. 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.

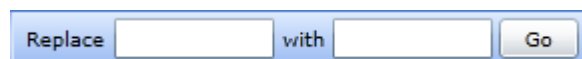


Figure 628 The Replace function

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.

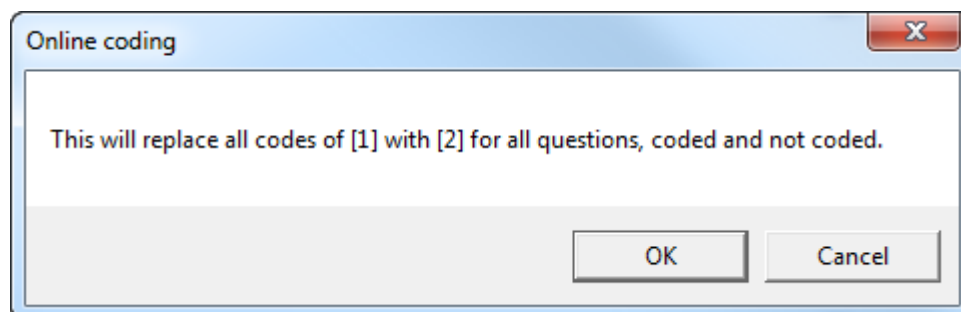


Figure 629 Example of a Warning

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.

19.9.1.6. *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.

19.10. 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 **Project management > Permissions** menu command for the survey. You can now grant coding access to online coding administrators and coders. (Project Administrator only)
3. In the questionnaire tree, drag and drop one single/multi question for each open/open-ended question (answer) to be coded. (Project 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". (Project 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).

20. The Reporting Menu

This chapter describes the functionality under the Reporting menu command. The menu is as shown below.

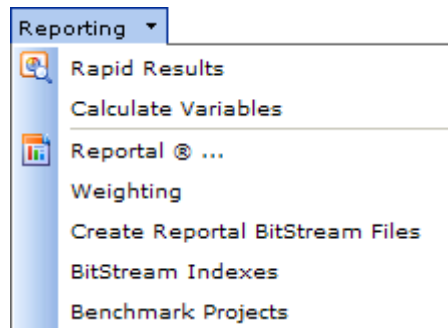


Figure 630 The Reporting menu

The commands are as follows:

- **Rapid Results** - opens the Rapid Results functionality (see the Rapid Results section on page 501 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 the Recalculating the Variables section on page 541 for more information).
- **Reportal** - opens Confirmit Reportal in a new window. Refer to the Reportal User Guide for further information.
- **Weighting** - opens the Weight Model list (see the Weighting section on page 517 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 project (see the BitStream Files section on page 524 for more information).
- **BitStream Indexes** - index the BitStream Files for improved performance (see the BitStream Indexes section on page 528 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 project must be set up in Confirmit Authoring. Go to this menu command to set up the project. For further information, refer to the Confirmit Reportal User Guide.

20.1. 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 project 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 The Question Filter section on page 507 for more information).

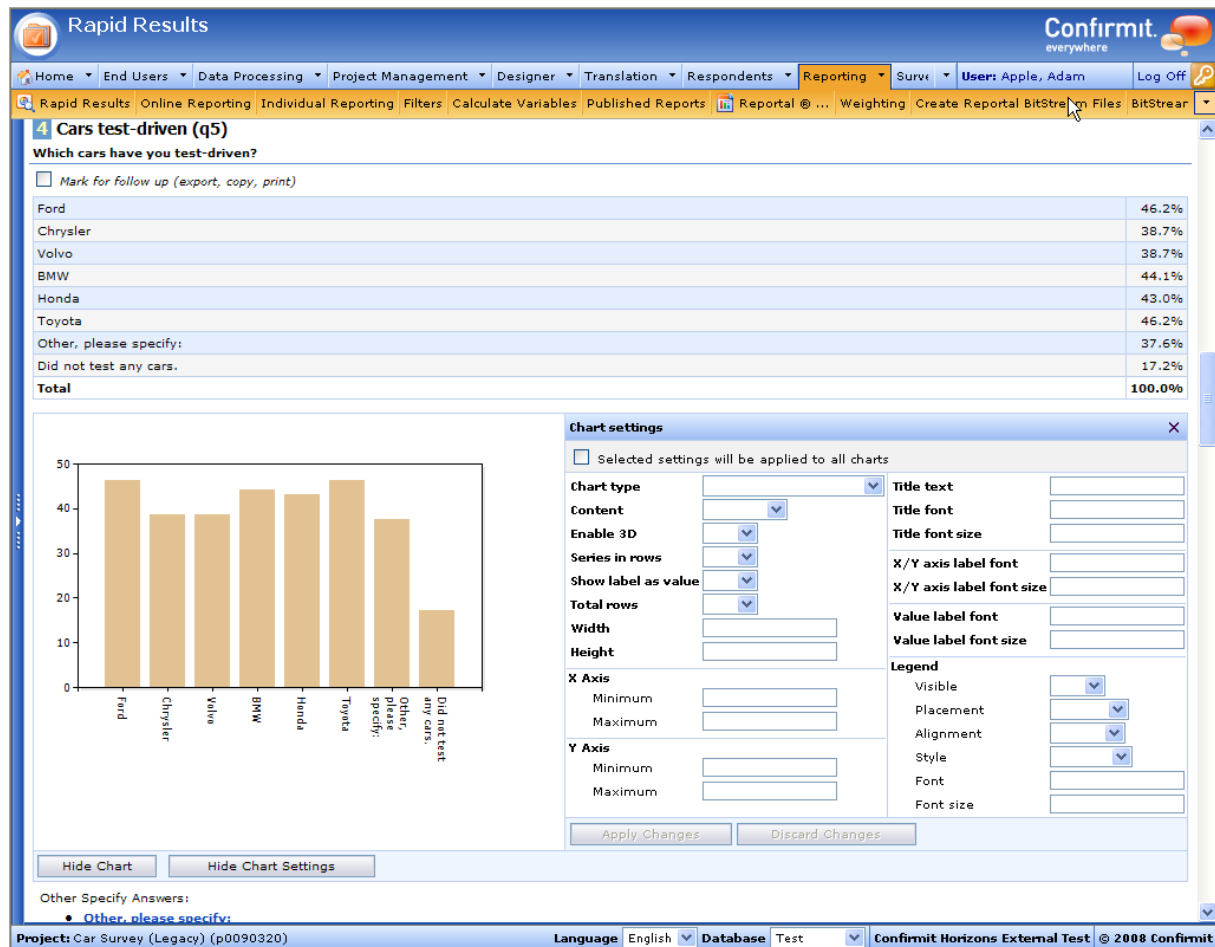


Figure 631 Example of the Rapid Results window layout

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.

20.1.1. 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).

20.1.2. 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.

20.1.3. The Rapid Results Menu Bar

Rapid Results has its own menu bar, see the figure below.

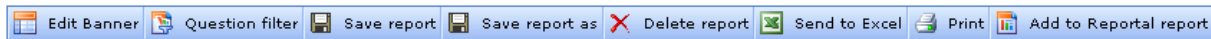


Figure 632 The Rapid Results menu bar

The menu options are described in the following sections. Note that only relevant options will be available.

20.1.3.1. 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.

20.1.3.1.1. How to Create the Banner

1. In the blue **Rapid Results** menu, click **Edit Banner**.

The Edit banner window opens as shown below.

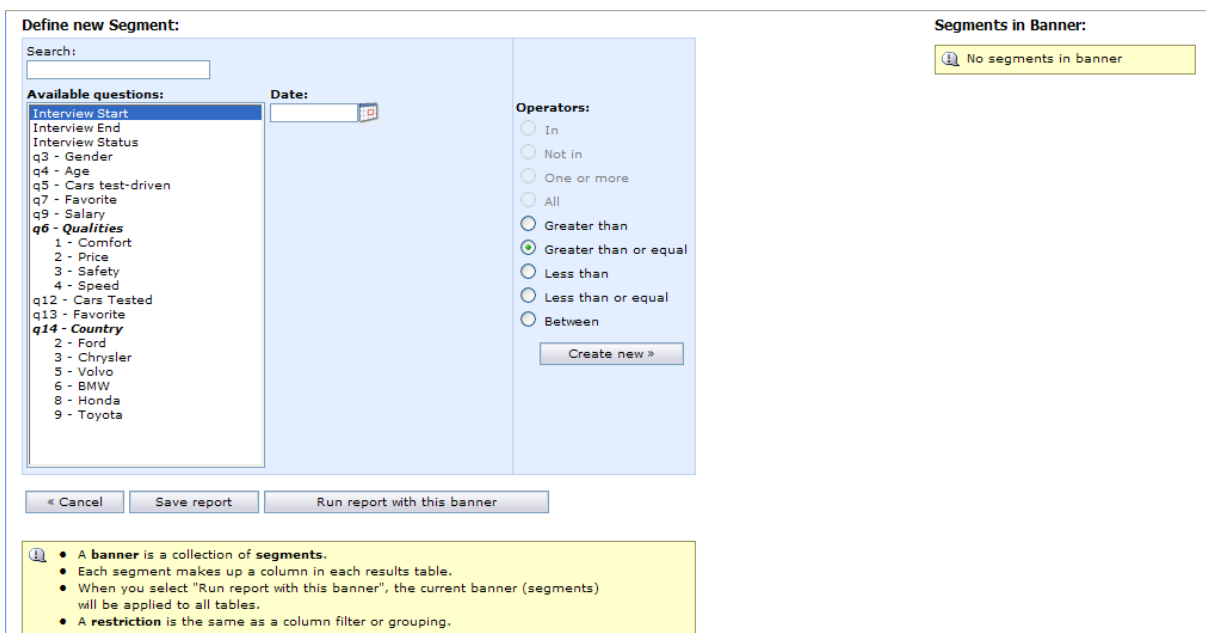


Figure 633 The Edit Banner window

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.

Define new Segment:

Search:

Available questions:

- Interview Start
- Interview End
- Interview Status
- q3 - Gender
- q4 - Age
- q5 - Cars test-driven
- q7 - Favorite
- q9 - Salary
- q6 - Qualities
 - 1 - Comfort
 - 2 - Price
 - 3 - Safety
 - 4 - Speed
- q12 - Cars Tested
- q13 - Favorite
- q14 - Country
 - 2 - Ford
 - 3 - Chrysler
 - 5 - Volvo
 - 6 - BMW
 - 8 - Honda
 - 9 - Toyota

Select one or more answers:

- [All]
- Under 18
- 18 to 30
- 31 to 50
- 51 to 67
- 68 or older

Operators:

- ☒ In
- ☐ Not in
- ☐ One or more
- ☐ All
- ☐ Greater than
- ☐ Greater than or equal
- ☐ Less than
- ☐ Less than or equal
- ☐ Between

Create new »

Create 5 new segments with 1 restriction each

Segments in Banner:

No segments in banner

Legend:

- A banner is a collection of segments.
- Each segment makes up a column in each results table.
- 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.

Figure 634 Example of banner editing process

- 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 The Filter Operators section on page 506 for more information)
- 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.

Define new Segment:

Search:

Available questions:

- Interview Start
- Interview End
- Interview Status
- q3 - Gender
- q4 - Age
- q5 - Cars test-driven
- q7 - Favorite
- q9 - Salary
- q6 - Qualities
 - 1 - Comfort
 - 2 - Price
 - 3 - Safety
 - 4 - Speed
- q12 - Cars Tested
- q13 - Favorite
- q14 - Country
 - 2 - Ford
 - 3 - Chrysler
 - 5 - Volvo
 - 6 - BMW
 - 8 - Honda
 - 9 - Toyota

Select one or more answers:

- [All]
- Under 18
- 18 to 30
- 31 to 50
- 51 to 67
- 68 or older

Operators:

- ☒ In
- ☐ Not in
- ☐ One or more
- ☐ All
- ☐ Greater than
- ☐ Greater than or equal
- ☐ Less than
- ☐ Less than or equal
- ☐ Between

Create new »

Create 5 new segments with 1 restriction each

Segments in Banner:

Clear banner

▶ Add here	Title:	Remove
▶ Add here	Title: Under 18	Remove
▶ Add here	Title: 18 to 30	Remove
▶ Add here	Title: 31 to 50	Remove
▶ Add here	Title: 51 to 67	Remove
▶ Add here	Title: 68 or older	Remove

Legend:

- A banner is a collection of segments.
- Each segment makes up a column in each results table.
- 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.

Figure 635 Example of a simple banner under creation

- 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.

Segments in Banner: [Clear banner](#)

▶ [Add here](#) Title: [Remove](#)

▶ [Add here](#) Title: [Remove](#)

Figure 636 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.

Restriction was added to segment

Define new Segment:

Search:

Available questions:

- Interview Start
- Interview End
- Interview Status
- q3 - Gender
- q4 - Age
- q5 - Cars test-driven**
- q7 - Favorite
- q9 - Salary
- q6 - Qualities**
 - 1 - Comfort
 - 2 - Price
 - 3 - Safety
 - 4 - Speed
- q12 - Cars Tested
- q13 - Favorite
- q14 - Country**
 - 2 - Ford
 - 3 - Chrysler
 - 5 - Volvo
 - 6 - BMW
 - 8 - Honda
 - 9 - Toyota

Select one or more answers:

- [All]
- Ford
- Chrysler
- Volvo
- BMW
- Honda
- Toyota
- Other, please specify
- Did not test any cars

Operators:

☐ In

☐ Not in

☒ One or more

☐ All

☐ Greater than

☐ Greater than or equal

☐ Less than

☐ Less than or equal

☐ Between

[Create new »](#)

Create 1 new segment with 4 restrictions

« Cancel Save report Run report with this banner

• A banner is a collection of segments.

• Each segment makes up a column in each results table.

• 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.

Segments in Banner: [Clear banner](#)

▶ [Add here](#) Title: [Remove](#)

q4 - Age : answered as
In [Remove](#)
18 to 30 (2)

AND

q5 - Cars test-driven : answered as
One or more of [Remove](#)
Chrysler (3)
Volvo (5)
BMW (6)
Honda (8)

▶ [Add here](#) Title: [Remove](#)

Figure 637 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 638 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.

20.1.3.1.2. 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.

20.1.3.2. 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 639 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.

20.1.3.3. 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.

20.1.3.4. 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.

20.1.3.5. 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** check box for those questions that you wish to export to Excel.



2 Gender (q3)
Please specify your gender.

☒ Mark for follow up (export, copy, print)	
Male	50.0%
Female	50.0%
Total	100.0%

Figure 640 The Mark for follow up check box

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.

All None

Available questions:

- q5 - Cars test-driven
- q7 - Favorite
- q9 - Salary
- q6 - Qualities - Comfort (1)
- q6 - Qualities - Price (2)
- q6 - Qualities - Safety (3)
- q6 - Qualities - Speed (4)
- q12 - Cars Tested
- q13 - Favorite
- q14 - Country - Ford (2)
- q14 - Country - Chrysler (3)
- q14 - Country - Volvo (5)
- q14 - Country - BMW (6)
- q14 - Country - Honda (8)
- q14 - Country - Toyota (9)

All None

Selected questions:

- q3 - Gender
- q4 - Age

☒ Display all questions in one worksheet

« Back to Report Send to Excel

Figure 641 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.

- Using standard Windows techniques, select in the left column any additional questions for which you wish to export the results.
- 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 the Report Settings section on page 513 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.

- Click **Send to Excel**.

The Excel file is created and the result tables imported. On completion, the File Download dialog opens.

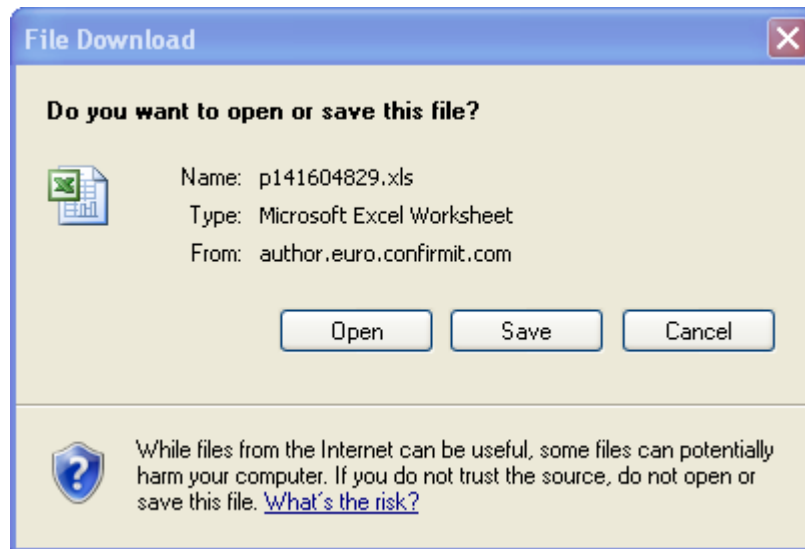


Figure 642 The Export Response Data overlay

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.

20.1.3.6. 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** check box 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 643 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.

20.1.3.7. How to Add to Reportal Report

Note: At least one Reportal report based on the project 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** check box 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.

The screenshot shows the 'Export Report' window. It has two main columns: 'Available questions:' on the left and 'Selected questions:' on the right. Each column has 'All' and 'None' buttons at the top. The 'Available questions' list includes items like 'q5 - Cars test driven', 'q7 - Favorite', 'q9 - Why', and several 'q6' and 'q14' items related to car qualities and countries. The 'Selected questions' list includes 'q3 - Gender', 'q4 - Age', 'q12 - Tested', and 'q13 - Favorite'. Between the columns are '>>' and '<<' buttons. Below the columns are settings for 'Reportal Report' (a dropdown), 'Page Master' (a dropdown), 'Auto Layout' (a dropdown), and 'Page Content' (a dropdown set to 'Table'). To the right of these settings is a green section titled 'Please note when copying tables to Reportal:' with three bullet points: 'You can only copy ten questions at a time...', 'it is recommended that you build the report inside Reportal using parameters and a limited number of pages.', 'Significance tests are not copied to the Reportal tables.', and 'Status filter settings are not copied. You will have to set up Reportal filters manually.' At the bottom are two buttons: '< Back to Report' and 'Add selected contents to Reportal report'.

Figure 644 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.

20.1.4. Report Settings and Navigation

Below the Rapid Results menu bar are a number of filter and selection possibilities.

Jump to question: 1: q2 - Name Report: -- Select report --

Report Settings

Decimals: 1 Status filter: Complete

Distribution: Percent Total column: None

Significance testing: Off

Apply Changes

Last Rapid Results BitStream generation: 20. mars 2006, 14:10:47 [Click here to update Rapid Results BitStream files](#)

Figure 645 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 project, 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 project.
- 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.

20.1.4.1. 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.
 - o **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.
 - o **Count** – gives the actual figure for the number of respondents choosing this answer.
 - o **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 the How to Send to Excel section on page 508 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.

20.1.5. 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 project.

To update the BitStream files:

1. Click **Update Rapid Results BitStream Files**.

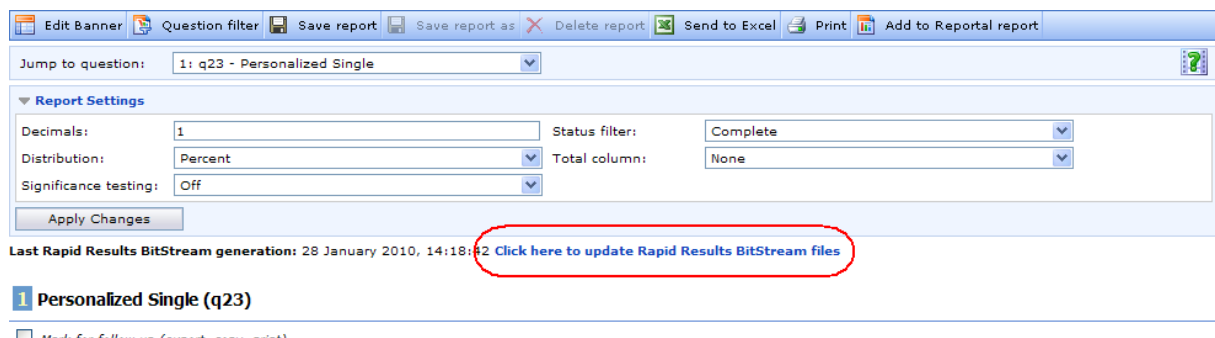


Figure 646 The Update BitStream Files link

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.

20.1.6. Editing Result Charts

When the Rapid Results window first opens, the question result tables will be listed with the charts hidden.

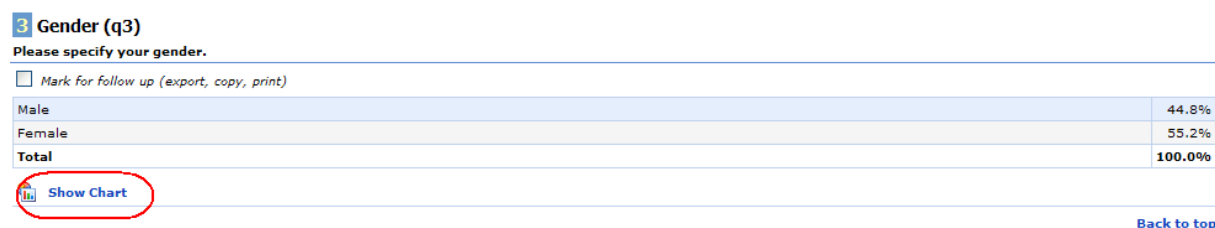


Figure 647 An example of a question listed in Rapid Results

To display the chart for a specific question, go to that question and click **Show Chart**.

2 q3 - Gender

^f("q2")^, please state your gender.

☐ Mark for follow up (export, copy, print)

Male	43,6%
Female	56,4%
Total	100,0%

[Back to top](#)*Figure 648 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.

☐ Selected settings will be applied to all charts

Chart type Distribution Enable 3D Series in rows Show label as value Show total Width Height X Axis Minimum Maximum Y Axis Minimum Maximum	Title Title font Title font size X/Y axis label font X/Y axis label font size Value label font Value label font size Legend Visible Placement Alignment Style Font Font size

Apply Changes
 Discard Changes

Figure 649 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 check-box 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:**
 - o **Title text** – type in the text you wish to appear as the title for the chart.
 - o **Title font** – type in the font you wish to use to present the title text.
 - o **Title font size** – type in the font size you wish to use to present the title text.
- **X/Y Label settings:**
 - o **X/Y Axis label font** – type in the font you wish to use for the chart axes labels.
 - o **X/Y Axis label font size** – type in the font size you wish to use for the chart axes labels.
- **Value label settings:**
 - o **Value label font** – type in the font you wish to use for the result value labels.
 - o **Value label font size** – type in the font size you wish to use for the result value labels.
- **Legend settings:**
 - o **Legend Visible** – select **Yes** to show the legend, **No** to hide it.
 - o **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.
 - o **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.
 - o **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.
 - o **Font** – type in the font you wish to use for the texts in the legend box.
 - o **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.

20.2. 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 that can be applied to your reports. These weight models are then applied to the result calculations between the real respondent data and the report, to adjust the data as required.

Note: Weight models may be applied to report folders and/or as a general report option. Report folder models override the generally selected model. It is not possible to apply weighting on questions that were answered only by a part of the respondents, for example questions in conditions.

20.2.1. How to Create a New Weight Model

To create a new weight model for a project:

1. Go to the **Reporting > Weighting** menu command.

The Weight Model List window opens with the weight models currently available for this project. 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.

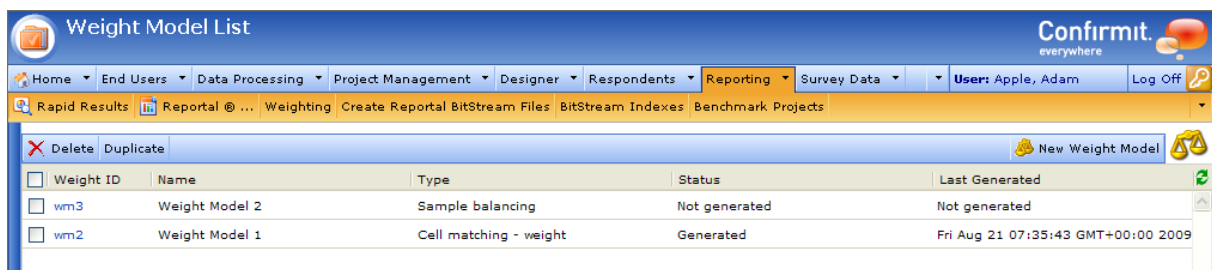


Figure 650 Example of the Weight Model List

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.

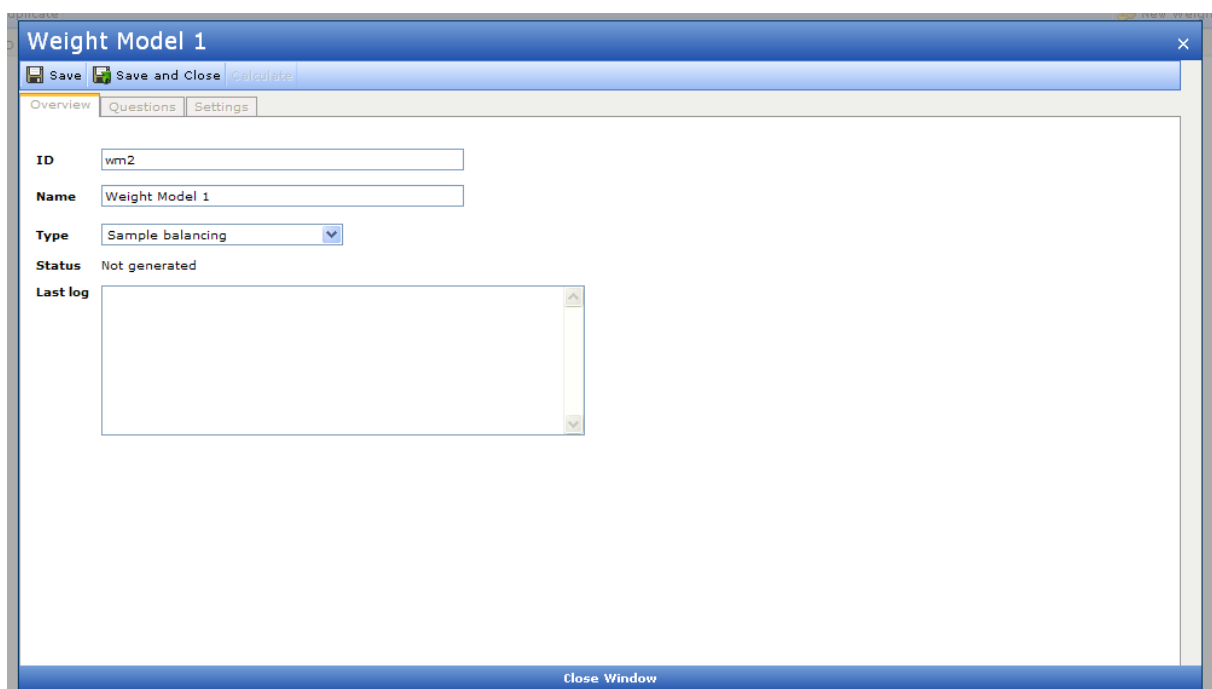


Figure 651 The Weight Model page

On this tab you define an ID and a Name as required (see the The Weight Model > Overview Tab Properties section on page 520 for more information). The system will define an ID by default; this can be changed as required.

3. On completion, click **Save** to save the changes.
4. Go to the Questions tab.

Note: To save changes in the Weight Model window, either click the Save button in the window's toolbar or move to a different tab. Changes are then saved automatically.

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 Type selected in the Overview tab. For Sampling and Cell Matching, only Single questions can be used in a weight model; for Survey Question, only Open Numeric questions can be used.

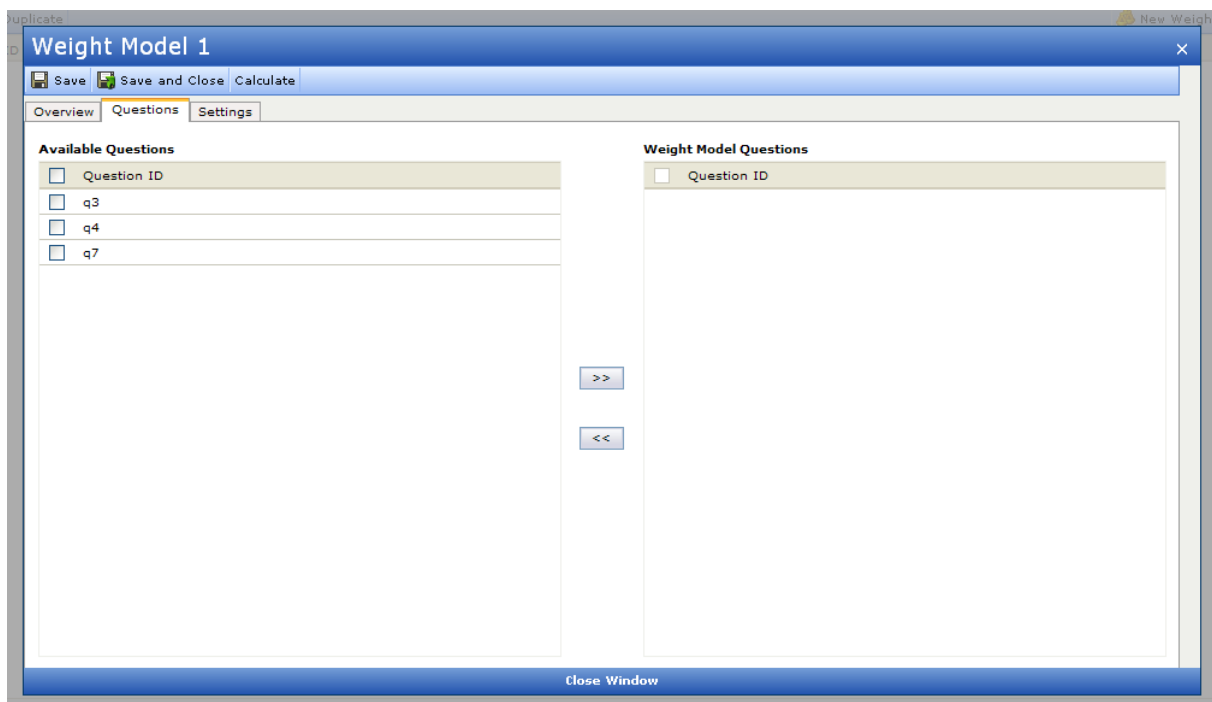


Figure 652 Example of the Questions tab

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.

uplicate

Weight Model 1

Save Save and Close Calculate

Overview Questions **Settings**

☐ Set First Question Fixed

Max Iterations

Deviation Limit

Targets

Marginal percentages for 'Gender'

Male [1]	0
Female [2]	0

Figure 653 The Settings tab when Sampling Balancing is the selected Type

uplicate

Weight Model 1

Save Save and Close Calculate

Overview Questions **Settings**

☐ Set First Question Fixed

Weight Matrix

Percentages (should total to 100)

Gender	Percentages
Male [1]	
Female [2]	

Figure 654 The Settings tab when Cell Matching - Percentage is the selected Type

Weight Matrix	
Gender	Weights
Male [1]	
Female [2]	

Figure 655 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 656 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 The Task Properties Recurrence Tab section on page 47 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.

20.2.1.1. 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.
- **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:
 - o **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.

- o **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%.
- o **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.
- o **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.

20.2.1.2. 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 the data set as a whole. Check this box to keep the first question with fixed values (see the Weighting Different Sub-samples Separately section on page 521 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.

20.2.2. How to Duplicate a Weight Model

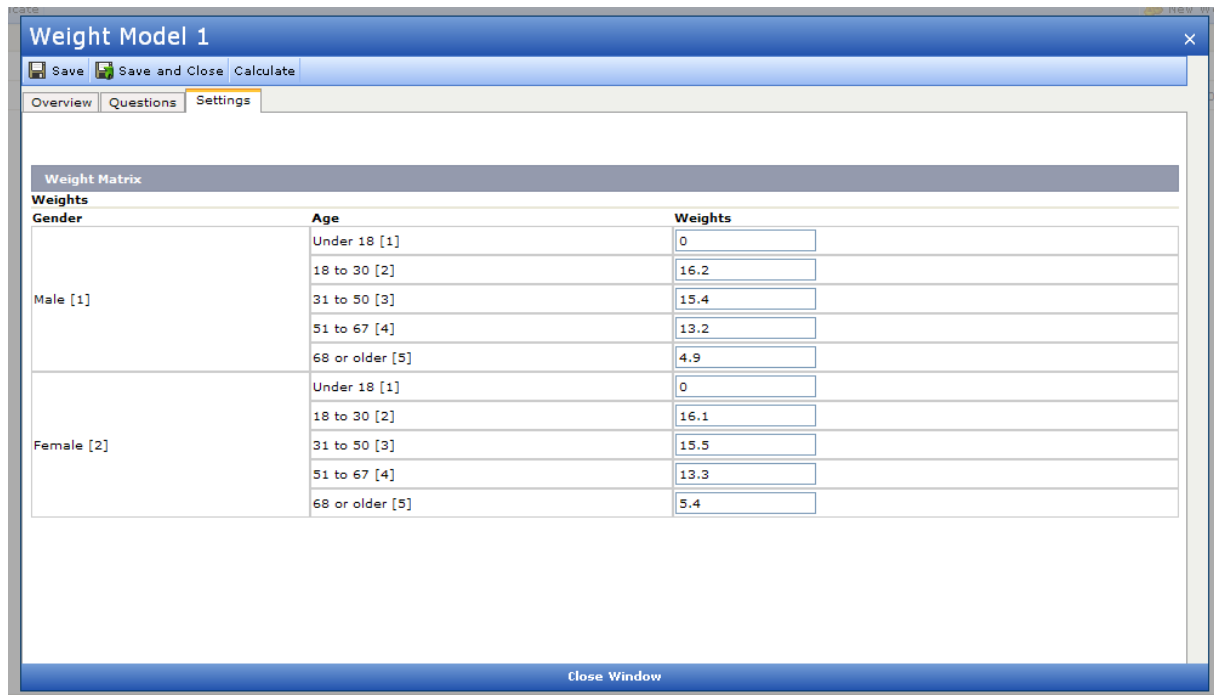
To duplicate a weight model:

1. When in a project, 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.

20.2.3. 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:



Weight Model 1

Save Save and Close Calculate

Overview Questions **Settings**

Weight Matrix

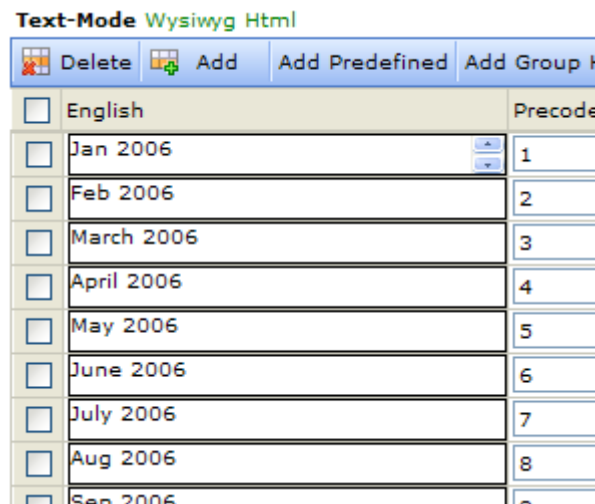
Weights	Age	Weights
Male [1]	Under 18 [1]	0
	18 to 30 [2]	16.2
	31 to 50 [3]	15.4
	51 to 67 [4]	13.2
	68 or older [5]	4.9
Female [2]	Under 18 [1]	0
	18 to 30 [2]	16.1
	31 to 50 [3]	15.5
	51 to 67 [4]	13.3
	68 or older [5]	5.4

Close Window

Figure 657 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.



Text-Mode Wysiwyg Html

Delete Add Add Predefined Add Group H

	Precode
☐ English	
☐ Jan 2006	1
☐ Feb 2006	2
☐ March 2006	3
☐ April 2006	4
☐ May 2006	5
☐ June 2006	6
☐ July 2006	7
☐ Aug 2006	8
☐ Sep 2006	9

Figure 658 Extract from the answer list of the month question

In the weight model, month will then have to be included as the first object:

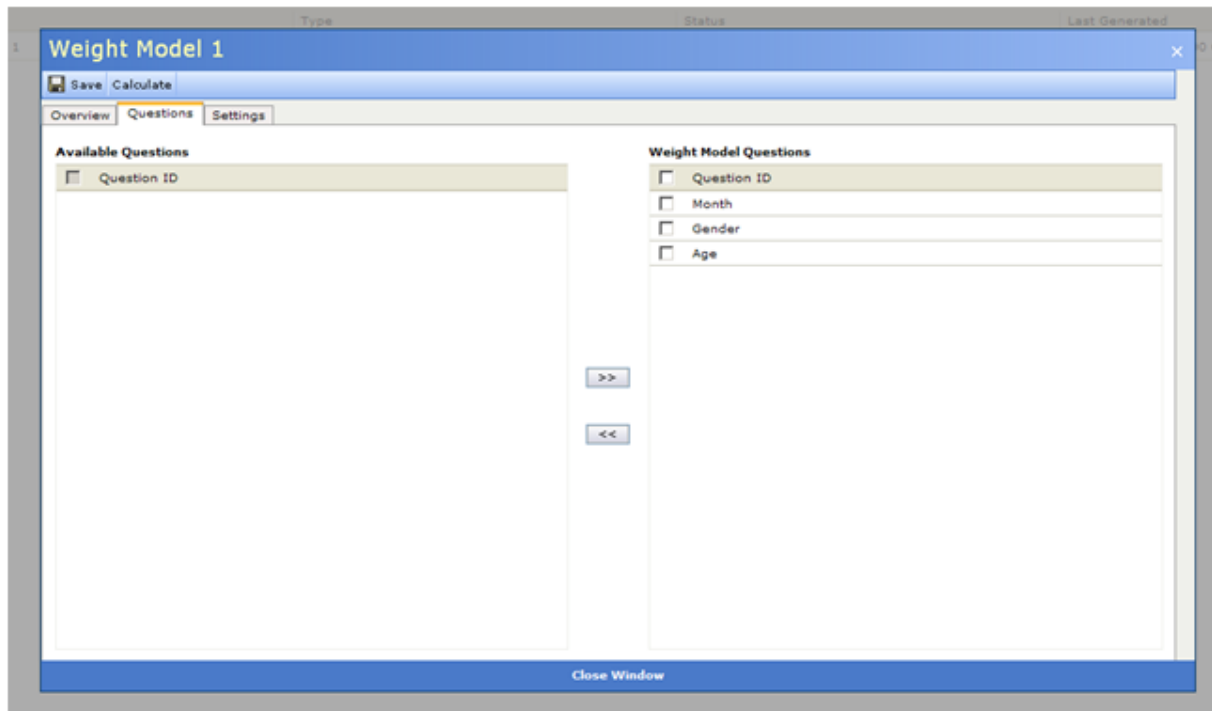


Figure 659 Weight model order of questions selected

In weight model properties, the "First question fixed" property is set (see the first figure in this section). 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.

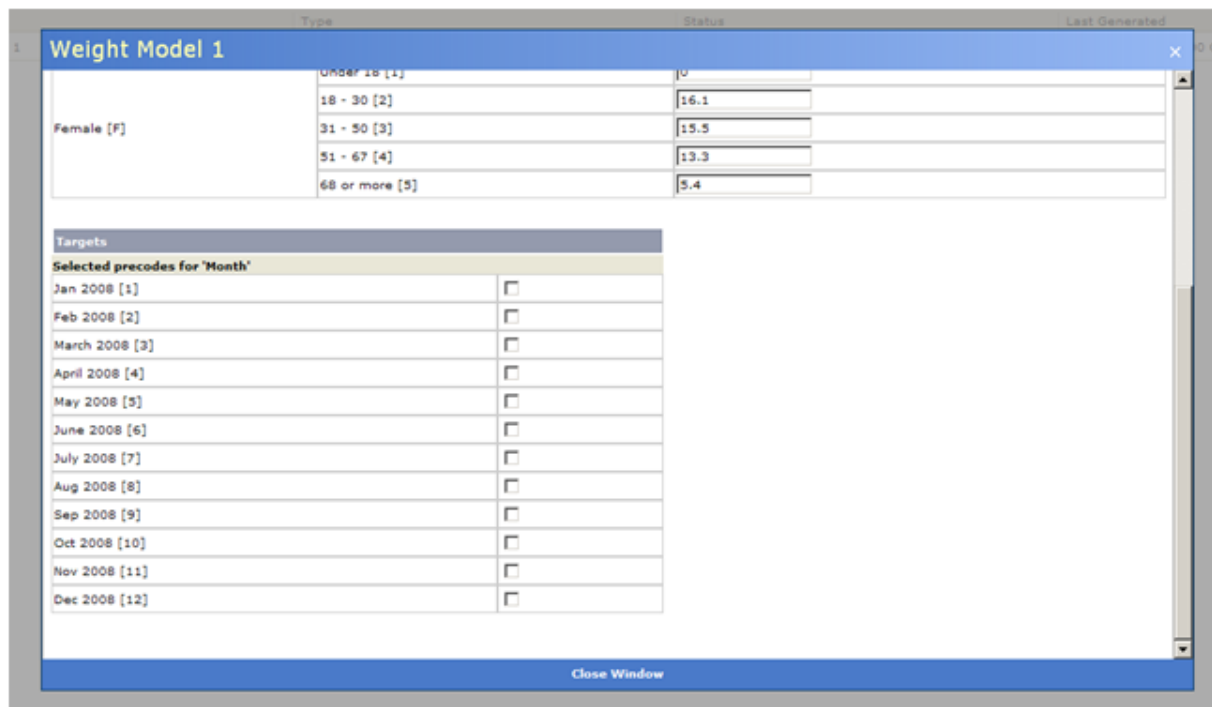


Figure 660 Set active codes in the "fixed question", month

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.

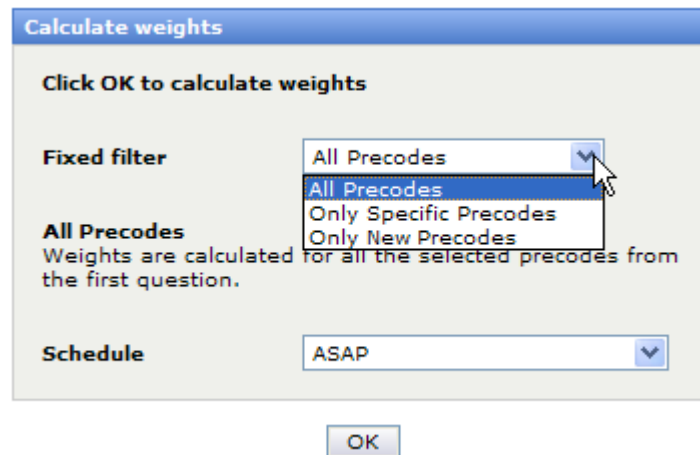


Figure 661 Select which codes the weights are to be calculated for in the "fixed question"

20.3. 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 projects, the benefits will be more obvious for projects 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 projects (both Optimized and Legacy) you can create only two different BitStream file sets: The Reportal file set, and Rapid Results file set (which is used in Rapid Results in Express and Survey Designer, and the Results tab/Topline report in Survey Designer). However using Panel Management rules in Community Panels you can create several file sets, taking different cuts of the data. Then for Community Panels projects 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.

20.3.1. How to Generate BitStream Files

1. Go to the **Reporting > Create Reportal BitStream Files** menu command.

The page shown below opens.

Active Database Production

Press OK to start a task for generating BitStream files.

When the task is created you can make it recurring to get periodically updated BitStream files.

☒ **Only Complete Responses**

OK

Figure 662 BitStream File generation settings

2. 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.

3. Click **OK**.

The files are generated as a task in Confirmit.

Once the BitStream files have been generated for a project, 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.

Active Database Production

A task already exist for BitStream generation. Press OK to enter task setup for this task.

From task setup you can e.g. change the recurrence pattern for the task or change the task parameters.

Change task setup

Update BitStream files now

☐ Force new file set

Figure 663 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:

- o **Change task setup** - click to open the Task Setup page (see below).
 - o **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).
 - o **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.
4. Click **Change task setup** to open the Task Setup page for the task as shown below.

The screenshot shows a dialog box with four tabs: Definition, Recurrence, Parameters, and Instances. The 'Definition' tab is active, displaying the following fields:

Task Type	BitStream Generator
ID	772927
Owner	nigelb
Company	Confirmit
Project Id	p27083529
Comment	
Command Line	Firmglobal.Confirmit.Tasks.Reporting

At the bottom of the dialog are two buttons: 'Save' and 'Run task'.

Figure 664 BitStream Generator task parameters

Go to the Recurrence tab and click **Change** to access the recurrence properties (see the Updating the BitStream Files section on page 514 for more information).

20.3.2. 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.

The dialog box has four tabs: Definition, Recurrence (selected), Parameters, and Instances.

New Start Time

- ☐ Disable task (clear queue)
- ☐ ASAP
- ☒ 00:00 22/11/2007

Recurring Task

Yes

End By

31/12/2007

Recurrence pattern type

Weekly

Weekly schedule

Every 1 week(s) on:

- ☐ Sun
- ☐ Mon
- ☐ Tue
- ☐ Wed
- ☐ Thu
- ☐ Fri
- ☐ Sat

Figure 665 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 project 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 scheduled occurrences are listed.

The dialog box has four tabs: Definition, Recurrence (selected), Parameters, and Instances.

Recurrence parameters saved

Current Settings	Initial Start Time: 21/11/2007 14:59:39
	Pattern: Weekly
	Interval: Every 1 week(s) on (Mon, Fri)
	Range: 31/12/2007
Next scheduled occurrences	21/11/2007 14:59:39
	23/11/2007 14:59:39
	26/11/2007 14:59:39
	30/11/2007 14:59:39
	03/12/2007 14:59:39

Figure 666 Example of the Recurrence tab with scheduled occurrences

When running a BitStream file generation on a project 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.

20.3.3. 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 Confirmit Authoring, go to the **Reporting > BitStream Indexes** menu command.

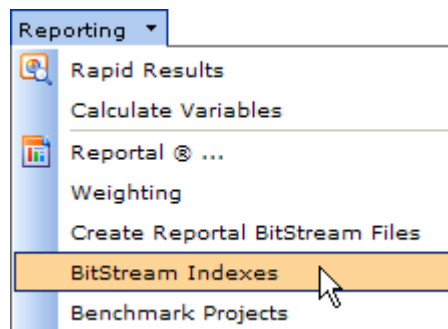


Figure 667 Starting BitStream Indexing

The BitStream Indexes page opens as shown in the example below.

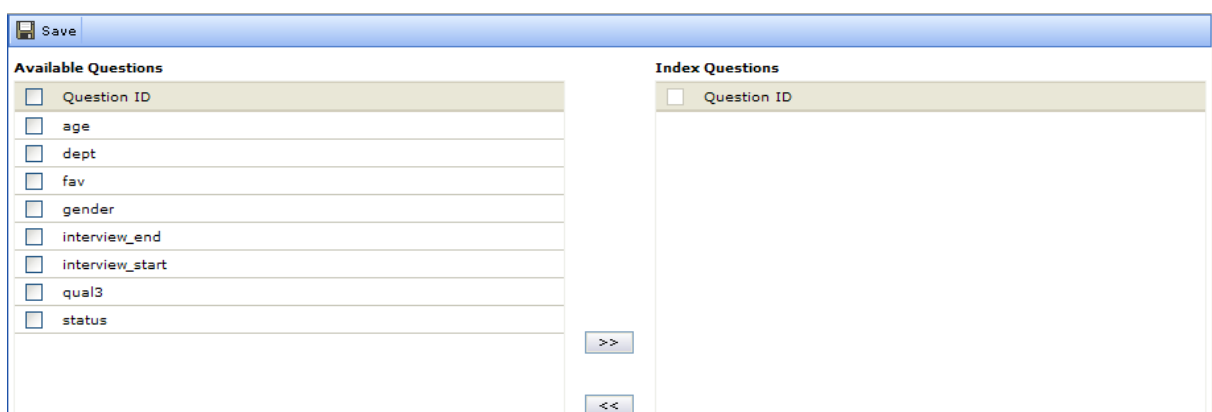


Figure 668 The BitStream Indexes page

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 the How to Generate BitStream Files section on page 524 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.

21. 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 them into the filter branch as required. You can invert the logic and toggle between AND and OR as required (see the Inverting the Logic section on page 534 for more information). You can also define levels in advanced filters.

21.1. Worked Example

This worked example describes step-by-step how to build an advanced filter. This example is 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).

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 project 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.

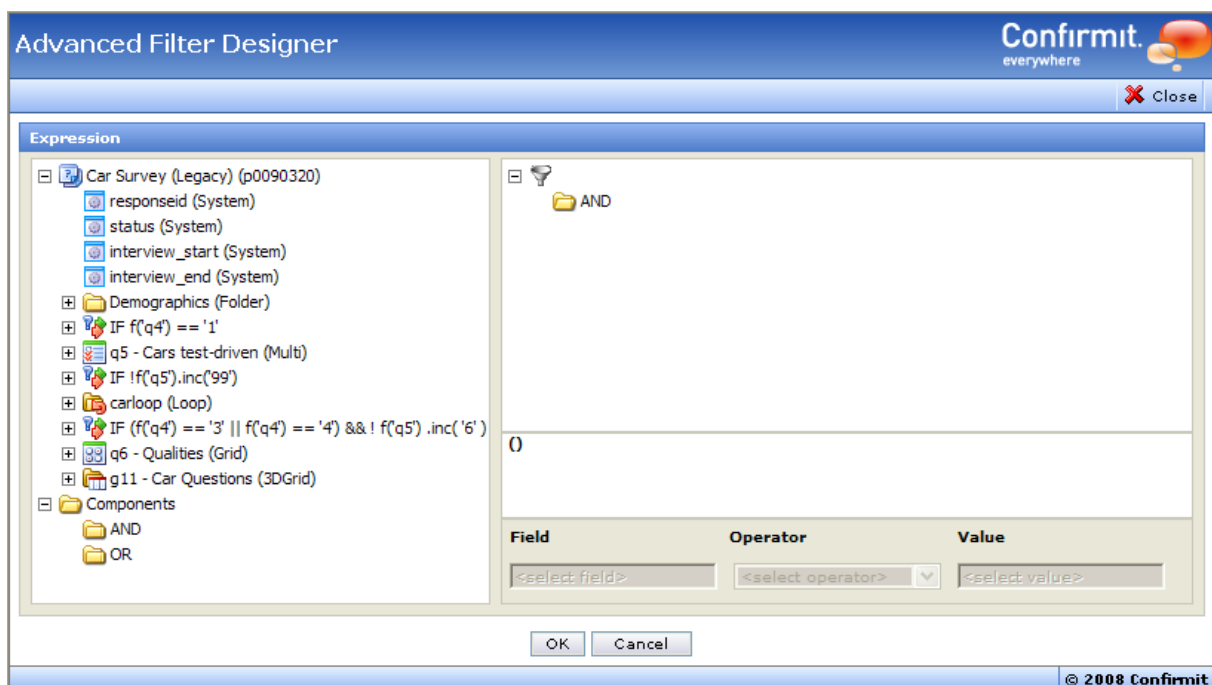


Figure 669 The Advanced Filter Designer window

3. Drag the **Gender**, **Age** and **Cars Test-Driven** questions from the questionnaire tree and drop them into the **AND** folder in the filter.

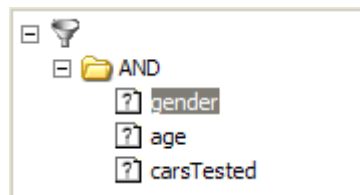


Figure 670 The three questions in the filter

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.

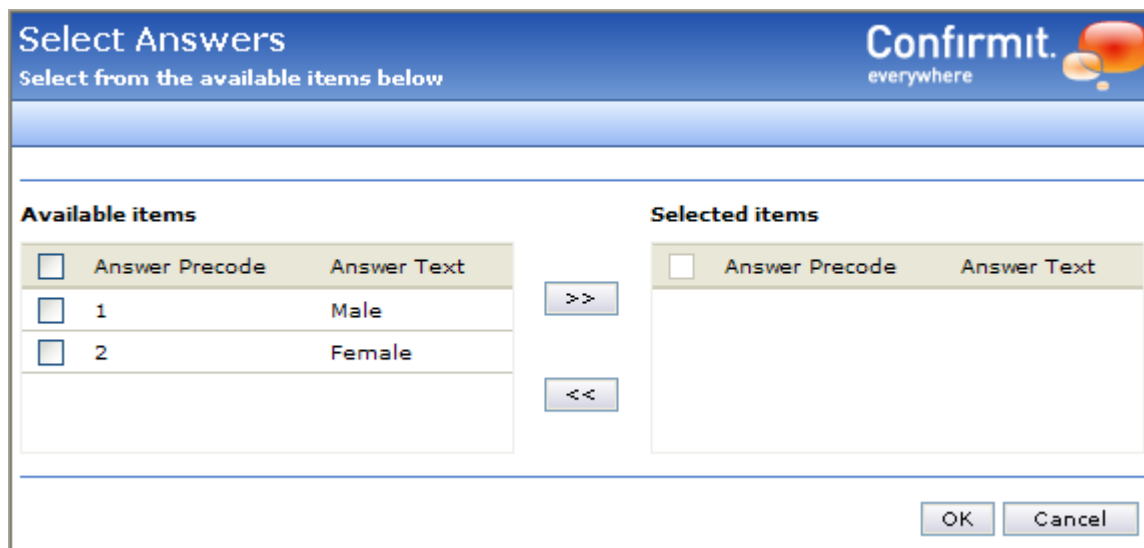


Figure 671 The Select Answers window for the Gender element

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.

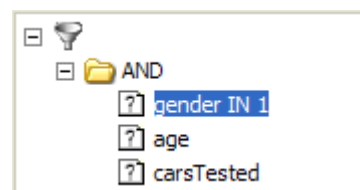


Figure 672 The Gender element with Male (code 1) specified

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.

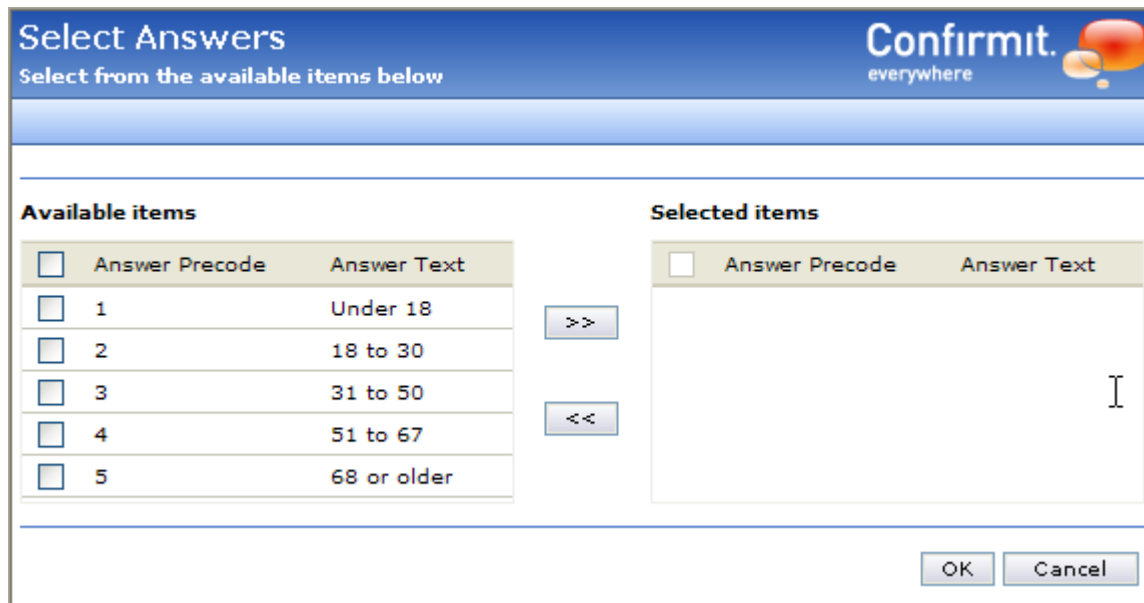


Figure 673 The Select Answers window for the Age element

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.

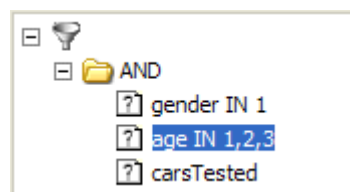


Figure 674 The Age element with codes 1, 2 and 3 selected

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.

Answer Precode	Answer Text
☐ 2	Ford
☐ 3	Chrysler
☐ 5	Volvo
☐ 6	BMW
☐ 8	Honda
☐ 9	Toyota
☐ 98	Other, please specify
☐ 99	Did not test any

Answer Precode	Answer Text

Figure 675 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.

(q3 IN 1 AND q4 IN (1,2,3) AND (q5_3 <> 0 OR q5_6 <> 0))

Field	Operator	Value
q5	OR	3,6

Figure 676 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.

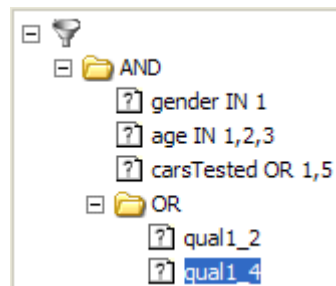


Figure 677 The filter with the qual1 elements

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.

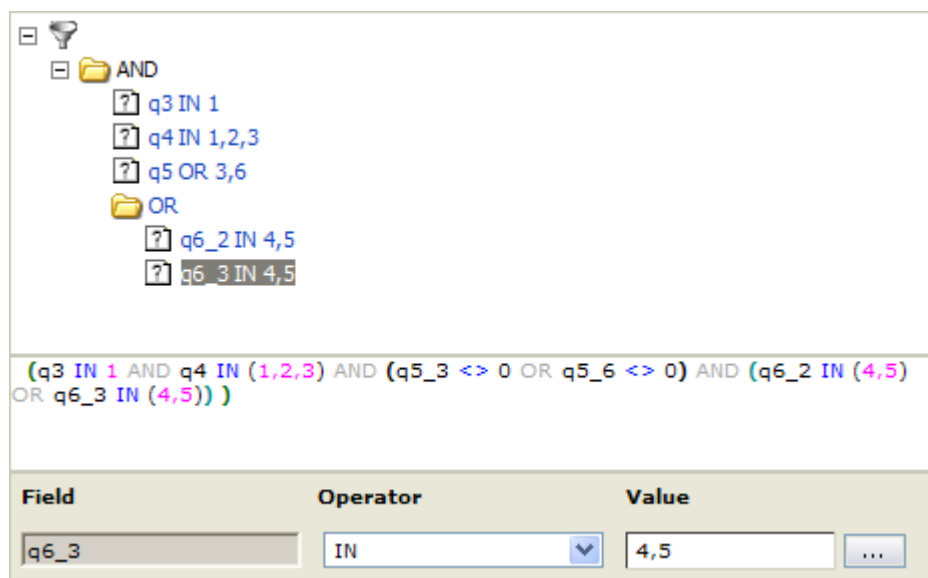


Figure 678 The final filter expression

The filter is now complete. Click **OK** to close the Advanced Filter Designer window.

21.2. 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.

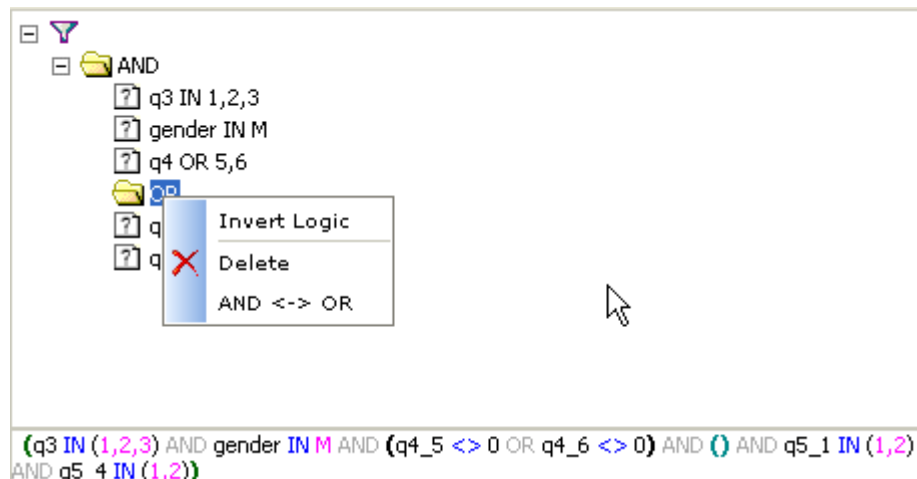


Figure 679 Inverting the logic or switching between AND and OR

21.3. 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.

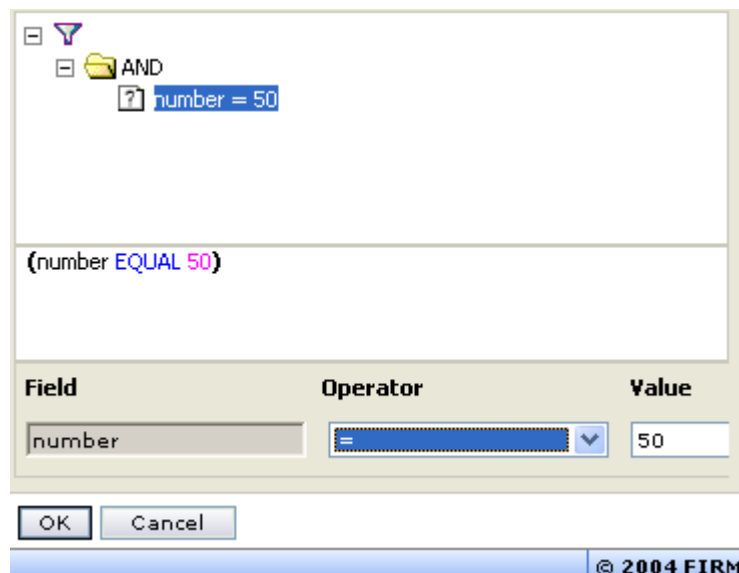


Figure 680 Defining a filter value for a numeric question

Multi Open Text Numeric questions must be expanded first, and the single items can then be dragged into the filter designer.

21.4. 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.

The screenshot shows a filter definition window. At the top, there is a tree view with a folder icon and the text 'AND'. Below it, a filter rule is displayed: 'interview_start = 10.11.2004'. Below the tree view, the same rule is shown in a text box: '(interview_start EQUAL 20041110)'. At the bottom, there is a table with three columns: 'Field', 'Operator', and 'Value'. The 'Field' column contains 'interview_start', the 'Operator' column contains '=', and the 'Value' column contains '10.11.2004'. To the right of the 'Value' field is a small calendar icon. Below the table are two buttons: 'OK' and 'Cancel'.

Field	Operator	Value
interview_start	=	10.11.2004

Figure 681 Defining a filter on interview start

22. 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: Grid, 3D-Grid questions cannot be recoded.

Note: From Confirmit v16 you will no longer be able to launch a survey that includes legacy recoded variables. Previously existing surveys that include this functionality will however still be usable.

22.1. 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 the Functions Documented in the Expression Builder section on page 544 for more information). Note that you can recode questions "manually" (see the Recoding Questions Manually section on page 541 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.

Text

Answers

Validation

Masking

Preview

Results

Languages

 (Help on codes)

 Add

Add Predefined

Add Loop Reference

Add Group Heading

Add Group End

Clear

 Delete rows

English	Code	Score	RdgSingle%	BgColor	Style	KeepPos	Other
Under 18	1				☐	☐	☐
18 to 30	2				☐	☐	☐
31 to 40	3				☐	☐	☐
41 to 50	4				☐	☐	☐
51 to 60	5				☐	☐	☐
Over 60	6				☐	☐	☐

Figure 682 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 project 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.

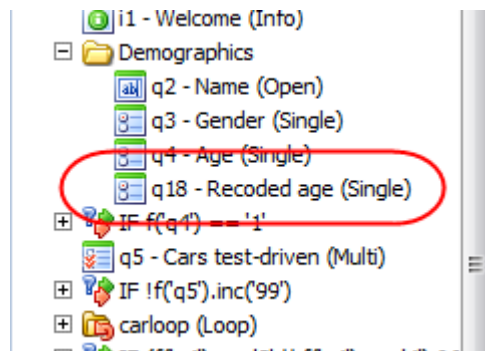


Figure 683 The new "Recoding" question in the questionnaire tree

3. Go to the question's Answers tab and add the answer alternatives **Up to 40** and **Over 40** to the question.

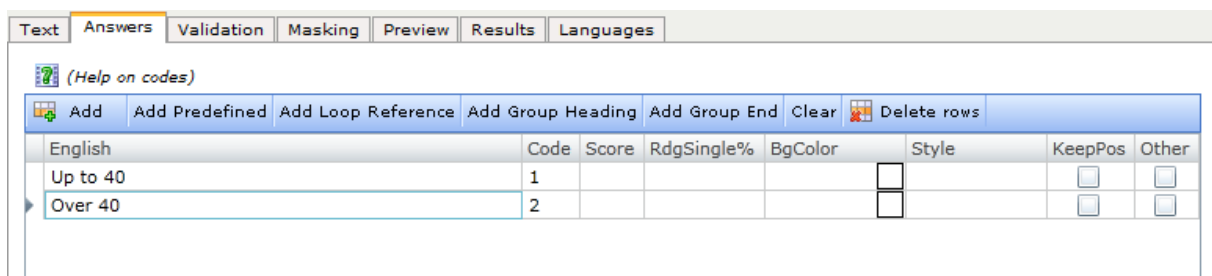


Figure 684 The answer alternatives for the recoding question

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.

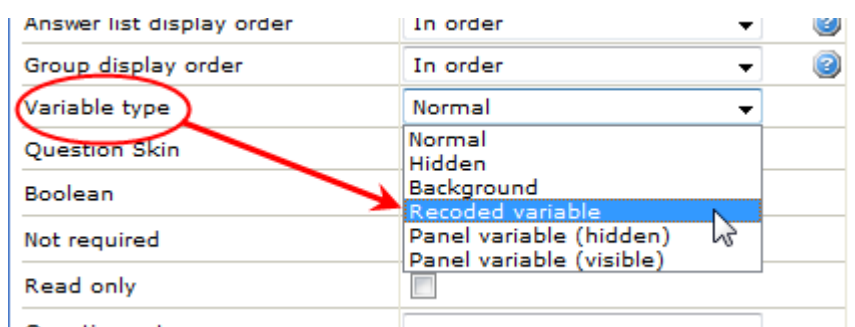


Figure 685 Selecting Recoded Variable

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.

Text	Answers	Preview	Results	Languages
(Help on codes)				
Add Add Predefined Add Loop Reference Add Group Heading Add Group End Clear Delete rows				
English	Expression	Code	Score	
Up to 40		1		
Over 40		2		

Figure 686 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.

- 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 the Functions Documented in the Expression Builder section on page 544 for more information).

Text	Answers	Preview	Results	Languages
(Help on codes)				
Add Add Predefined Add Loop Reference Add Group Heading Add Group End Clear Delete rows				
English	Expression	Code	Score	
Up to 40		1		
Over 40		2		

Condition Builder

Click here for documentation of all functions

Operators

☐ And
☐ Or
☒ None
☐ Not

Variables

q4

Functions

☒ ==
☐ <>
☐ >
☐ >=
☐ <
☐ <=
☐ Any
☐ None
☐ Answered

Value

Under 18 [1]
18 to 30 [2]
31 to 40 [3]
41 to 50 [4]
51 to 60 [5]
Over 60 [6]

Expression

Add to expression
Validate
Clear

Figure 687 The Expression Builder below the Answers tab, with the age question and its answers displayed

- 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:

- o 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".
 - o 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:

The screenshot displays the Confirmit 16 Authoring User Guide interface. The top section shows a table with two rows: "Up to 40" and "Over 40". The "Up to 40" row has an expression "q4 == \"1\" OR q4 == \"2\" OR q4 == \"3\"" and a code of 1. The "Over 40" row has a code of 2. The bottom section shows the Condition Builder interface. It has a tab for "Condition Builder" and a link to "Click here for documentation of all functions". The interface is divided into four main sections: Operators, Variables, Functions, and Value. The Operators section has radio buttons for "And", "Or", and "None", and a checkbox for "Not". The Variables section has a list with "q4" selected. The Functions section has radio buttons for "==" (selected), "<>", ">", ">=", "<", "<=", "Any", "None", and "Answered". The Value section has a list with "Under 18 [1]", "18 to 30 [2]", "31 to 40 [3]", "41 to 50 [4]", "51 to 60 [5]", and "Over 60 [6]". The "31 to 40 [3]" option is selected. The Expression section shows the expression "q4 == \"1\" OR q4 == \"2\" OR q4 == \"3\"" and has buttons for "Add to expression", "Validate", and "Clear". Below the expression, the result is shown: "q4 == Under 18 OR q4 == 18 to 30 OR q4 == 31 to 40".

Figure 688 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:

Text	Answers	Preview	Results	Languages
(Help on codes)				
Add Add Predefined Add Loop Reference Add Group Heading Add Group End Clear				
English	Expression	Code	Score	
Up to 40	<code>q4 == "1" OR q4 == "2" OR q4 == "3"</code>	1		
Over 40	<code>q4 == "4" OR q4 == "5" OR q4 == "6"</code>	2		

Figure 689 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.

22.2. 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 `(+)(-)(*)(/)(%)`.

22.3. 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 the Conversion of Legacy Recoded Variables section on page 542 for more information).

1. Go to the **Reporting > Calculate Variables** menu command.

The Calculate variables overlay opens.

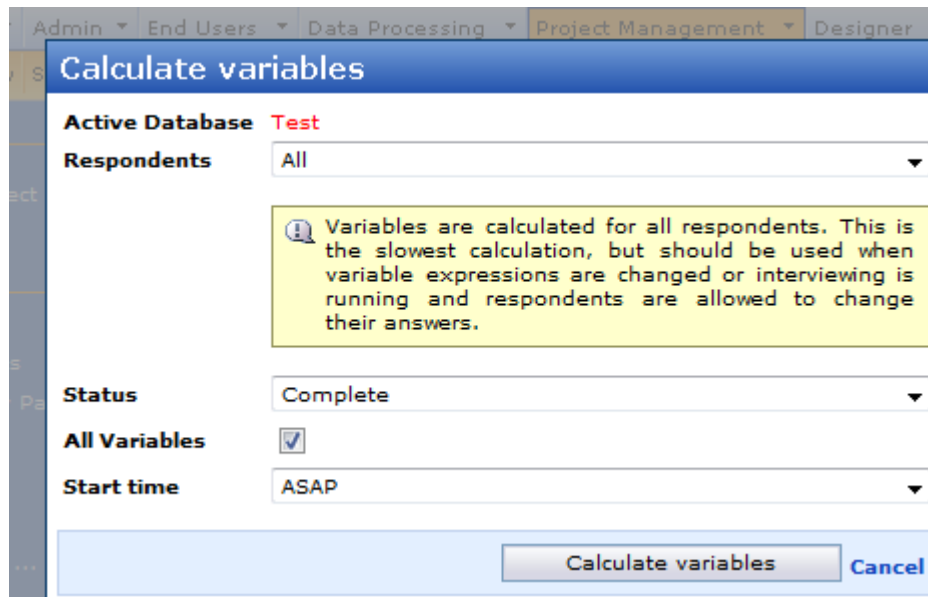


Figure 690 Calculating the Variables

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**.

22.4. 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.

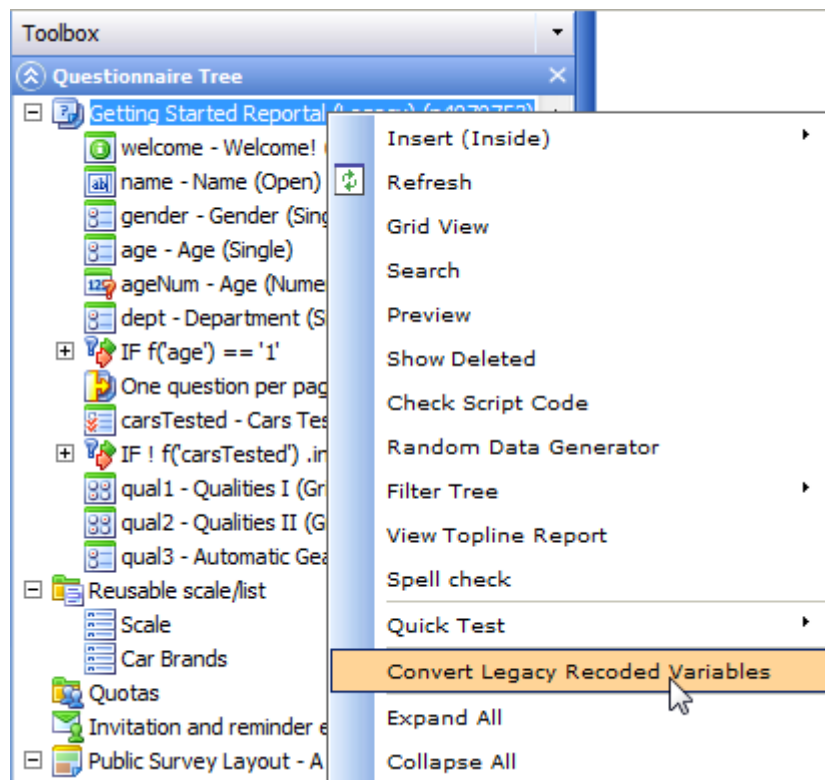


Figure 691 Selecting Convert Legacy Recoded Variables from the right-click menu

Confirmit analyzes the survey and locates any legacy recoded variables. An information/confirmation page is displayed, stating the number of legacy recoded variables found.

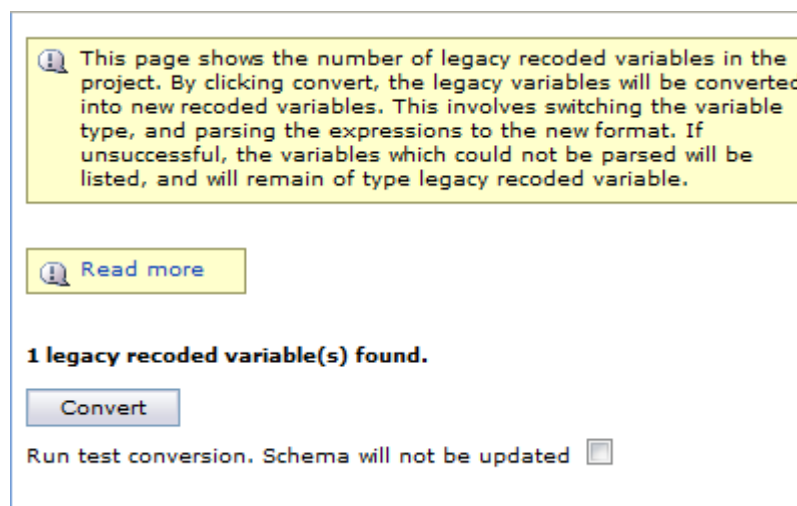


Figure 692 The information page stating how many legacy recoded variables were found

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.

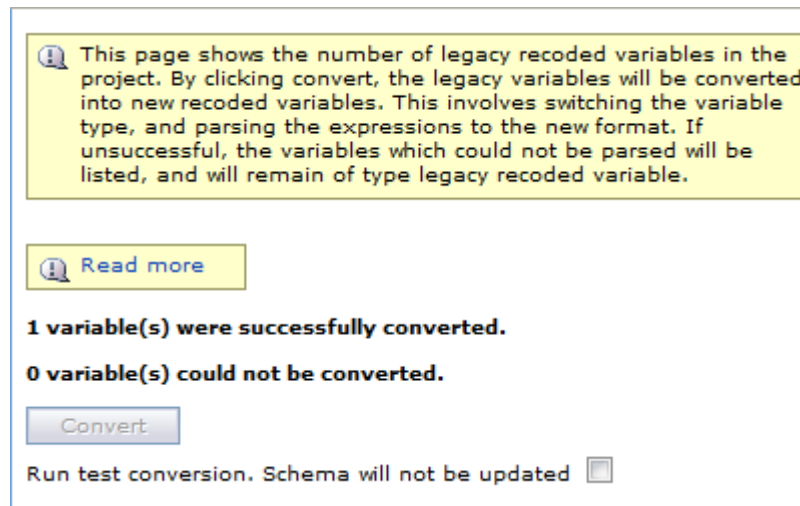


Figure 693 The result of the conversion process

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.

22.5. 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.

22.5.1. 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.

22.5.2. 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.

22.5.3. 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 nCount equals 0 - will return string from 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.

22.5.4. 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).

22.5.5. Date Intervals

Constant	Numeric value	String expression
dtYear	0	yyyy
dtQuarter	1	q
dtMonth	2	m
dtDayOfYeear	3	y
dtDay	4	d
dtWeekday	6	w
dtHour	7	h
dtMinute	8	n
dtSecond	9	s

22.5.6. 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.

22.5.7. Different Functions

Function	Return type	Description
Weights(string questionId, ...)	int	Returns the weights of answers of questions.
GetLookupId(string key, int schemald, int relationId)	int	Returns a LookupId.
GetLookupLabel(string key, int schemald, int relationId)	string	Returns a LookupLabel.

23. Administration of End Users

This chapter explains the End Users Administration interface functionality.

The administration interface controls the handling of Lists and Projects, 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 (go to [How to Access a Published Online Report](#) for more information).

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.

The figure below visualizes the End Users administration interface:

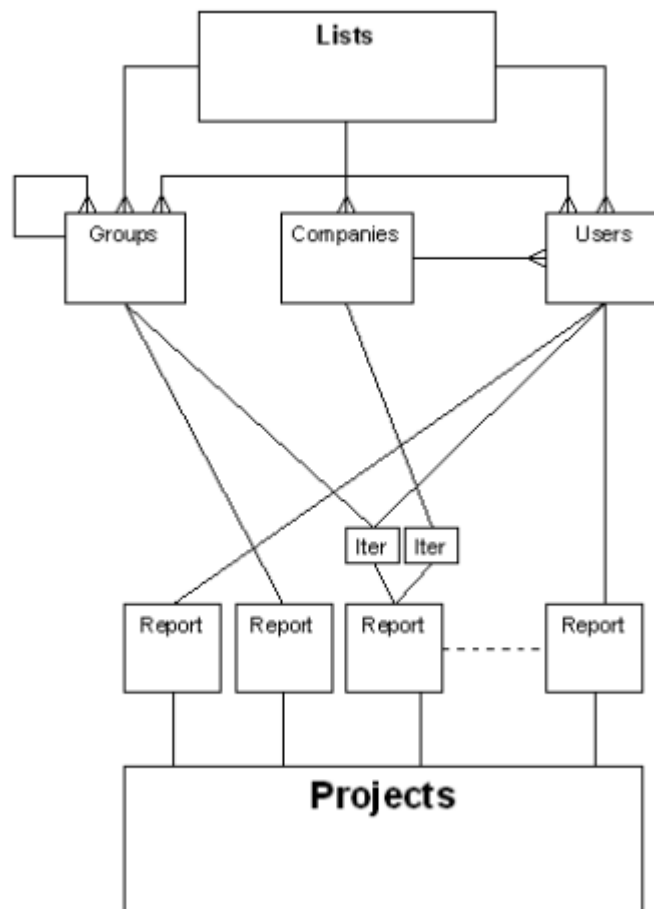


Figure 694 The End User administration interface layout

There are two “top” levels – Lists and Projects.

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.

Projects – a project 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 project. 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".

23.1. The General Procedure

The general procedure is as follows:

1. Create a list (see the How to Create a New End User List section on page 551 for more information).
2. In the list, create a company (see the How to Add a New Company to a List section on page 555 for more information).
3. Register end users in the company (see the How to Add a New User to a List section on page 557 for more information).
4. Collect end users into groups as required (see the How to Add a User to a Group section on page 565 for more information).
5. Register reports and report iterations.
6. Link reports and report iterations to companies, groups and end users.

23.2. The End Users Menu

When you enter a project, 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.

23.3. 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.

List ID	List Name	Creator	Created
3751931	Open list	Apple, Adam	07/12/2009 13:20:22

Figure 695 Example of the End User Lists window

This window contains an inventory of 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 inventory is searchable using the search criteria fields at the heads of the data columns. 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.

- 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.

Current List: Open list (3751931)

General | Permissions | Companies | Users | Groups | Assigned Online Reports

Save

Details

List ID	3751931
List name	Open list
Always use SSL	☐
Creator	Apple, Adam
Created	07/12/2009

Online Reporting Options

Web Template ▼

Link <http://survey.testlab.firmglobal.net/customer/login/login.asp?listid=3751931> [Copy to Clipboard](#)

Reportal Options

Link <http://reportal.testlab.firmglobal.net/reportal/default.aspx?PortalId=3751931> [Copy to Clipboard](#)

Figure 696 Example of the Update Current End User List window – General tab

23.4. 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:

- Go to the **End Users > Lists** menu command.
- Click the **Add New List** button located towards the right end of the End User Lists toolbar.

The New End User List dialog opens.

New End User List

List Name

OK **Cancel**

Figure 697 The New End User List dialog

- Type the name of the new list into the List Name field.
- 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.

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 the How to Add a New Company to a List section on page 555 for more information).

You can now add Users to a list (see the How to Add a New User to a List section on page 557 for more information).

23.5. The General Tab

The figure below shows an example of the End User List General tab.

Current List: Doclist 1 (948460)

General Permissions Companies Users Groups

Save

Details

List ID 948460

List name

Always use SSL ☐

Creator Apple, Adam

Created 24.01.2011

Reportal Options

Link <http://reportal.testlab.firmglobal.net/reportal/default.aspx?PortalId=948460> Copy to Clipboard

Figure 698 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 the Secure Sockets Layer (SSL) section on page 2 for more information).
- **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.
- **Reportal Options Link** – click to go to the Reportal login 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.

Note: The majority of the details you provide here are displayed in the End User Lists window.

23.6. 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 699 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:

- **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:
 - o **None** - the user does not have access to the project.
 - 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.
- **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.

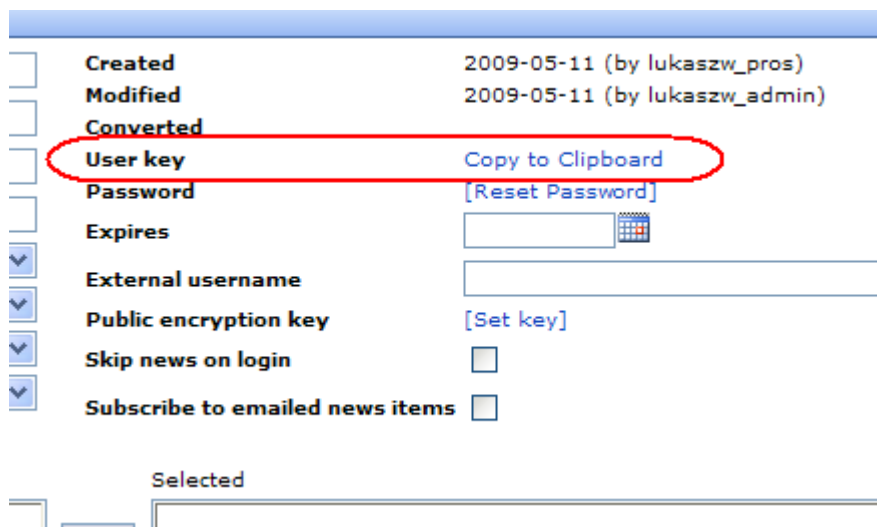
Once you have made the appropriate settings, click **Save** to save the changes.

23.6.1. How to Add a User to the Permissions List

The users in this list are those who are registered to your company and those who it is intended should have access to administrate End User lists. This can for example include system administrators of client companies who will need administrative rights to the lists you are creating.

To add a user to the list:

1. Go to the **Admin > Accounts > Users** menu command.
The User List opens.
2. In the User List, find the user you wish to add to the Permissions list and click on the blue **User ID** link for that user.
The Details page for that user opens.
3. Towards the upper-right corner of the Details page is the **User Key** property. Copy this key to your clipboard by clicking the link.



The screenshot shows a user details form with various fields. The 'User key' field is highlighted with a red oval, and the 'Copy to Clipboard' link next to it is also circled in red. Other fields include 'Created', 'Modified', 'Converted', 'Password', 'Expires', 'External username', 'Public encryption key', 'Skip news on login', and 'Subscribe to emailed news items'.

Figure 700 The Key property in the user's Details page

4. Go to the **End Users > Current List** menu command, then go to the **Permissions tab**.
5. Scroll to the bottom of the page and click the **Add other users** link.
The Enter Keys of New Users dialog opens.
6. Paste the key you copied in step 3, into the data field, then click **Add**.
The window closes and the new user is added to the Permissions list in the Other Users section at the bottom of the page. You can now give the user the appropriate permissions.
7. Save the changes.

23.6.2. 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.

23.7. The Companies Tab

This tab lists the companies to which you have access. 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. The Companies tab opens at the General tab .

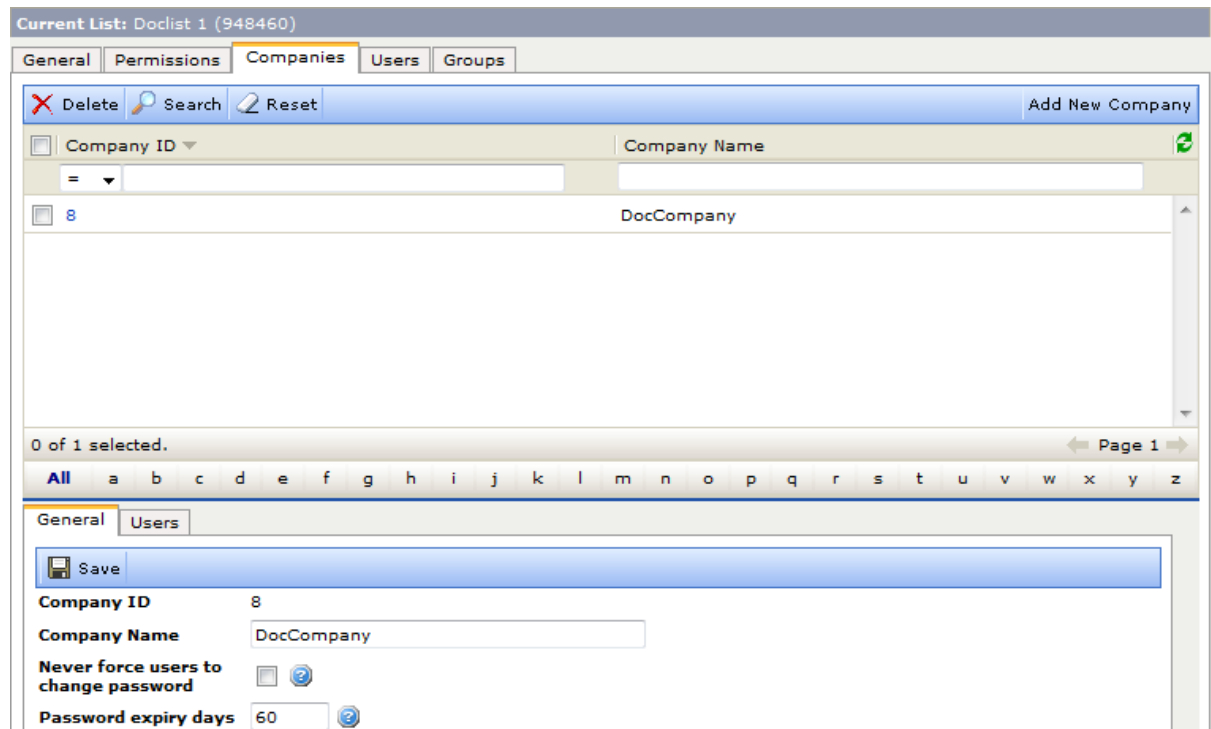


Figure 701 Example of the Companies tab

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.

23.7.1. 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.

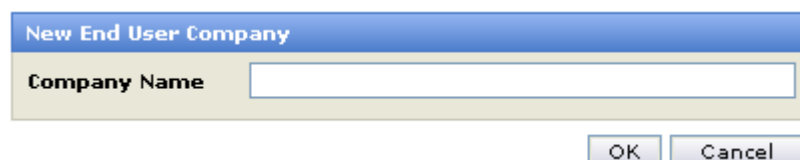


Figure 702 The New End User Company dialog

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.

23.7.2. The Companies > Users Tab

This tab lists the users that are linked to the selected company.

General

Users

These are the users belonging to this company.

Current Group: DocCompany (8)

User ID	User Name ▲	Email	First Name	Last Name
23	aa	documentation@confirm	Adam	Avian
24	bb	documentation@confirm	Belinda	Brant
25	cc	documentation@confirm	Charles	Chaffinch
26	dd	documentation@confirm	David	Dunlin
27	ee	documentation@confirm	Ellen	Eagle
28	ff	documentation@confirm	Fred	Fulmar
29	gg	documentation@confirm	Gareth	Gadwall
30	hh	documentation@confirm	Helen	Hawk
31	ii	documentation@confirm	Ian	Ivorybill
32	jj	documentation@confirm	Janice	Jackdaw

Page 1

Alla b c d e f g h i j k l m n o p q r s t u v w x y z

Figure 703 Example of the Companies > Users tab

To add users to the company, go to the Users tab in the upper area (see the How to Add a New User to a List section on page 557 for more information).

23.8. 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 (see the The Companies Tab section on page 554 for more information). 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.

Current List: Doclist 1 (948460)

General Permissions Companies **Users** Groups

Group Filter

☐	User ID	User Name ▲	Email	First Name	Last Name	Company
☐	=					
☐	23	aa	documentation@conf	Adam	Avian	DocCompany
☐	24	bb	documentation@conf	Belinda	Brant	DocCompany
☐	25	cc	documentation@conf	Charles	Chaffinch	DocCompany
☐	26	dd	documentation@conf	David	Dunlin	DocCompany
☐	27	ee	documentation@conf	Ellen	Eagle	DocCompany
☐	28	ff	documentation@conf	Fred	Fulmar	DocCompany
☐	29	gg	documentation@conf	Gareth	Gadwall	DocCompany
☐	30	hh	documentation@conf	Helen	Hawk	DocCompany
☐	31	ii	documentation@conf	Ian	Ivorybill	DocCompany
☐	32	jj	documentation@conf	Janice	Jackdaw	DocCompany

0 of 10 selected. Page 1

All a b c d e f g h i j k l m n o p q r s t u v w x y z

Figure 704 Example of the Users tab

23.8.1. 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.

- 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.

Add Users

Company
Language

☐	User Name	Password	Email	First Name	Last Name	Comment
☐						

1 rows

Figure 705 The Add Users dialog

- In the Company field, select the company to which the user is to be attached.
- 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.
- 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.
- 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.
- 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 (go to [How an End User can Change Their Password - The Change Password Link](#) for more information), and you as the administrator can change a user's password if necessary (see the How to Change an End User's Password section on page 559 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 the How to Edit the User Information section on page 558 for more information).

Figure 706 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.

23.8.2. 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 707 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 the How to Attach a Group to a User section on page 559 for more information) and the Published Online Reports tab to give the user access to reports (go to [The Users > Details Page > Published Online Reports Tab](#) for more information).

Note: You cannot change the user's user ID number or the date on which the user's registration was created in the system.

23.8.3. 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 the Forgotten Password section on page 15 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 the Password Policy section on page 3 for more information).
4. Click **Save** to save the new password for that user.

23.8.4. 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.

23.8.4.1. 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.

Available items		Selected items	
☐	Group ID Group Name	☐	Group ID Group Name
☐	1 Group 1		
☐	2 Group 2		

Figure 708 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.

23.8.4.2. 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.

23.8.5. 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.

The required fields in an End User List file are as follows:

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.

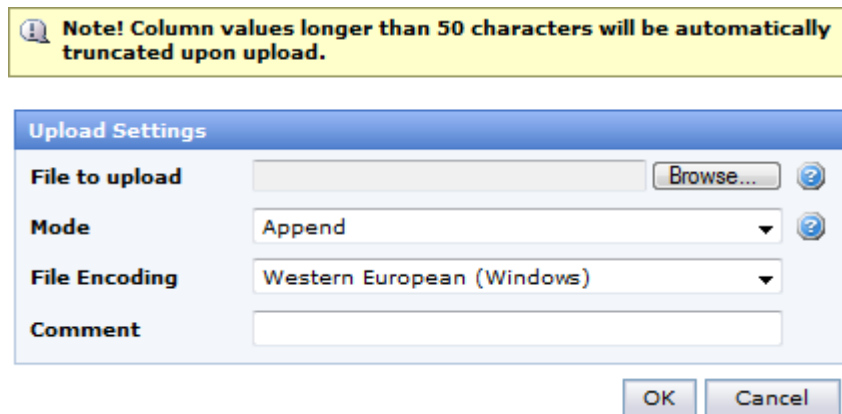


Figure 709 The Upload Settings dialog

The fields in the dialog are as follows:

- **File to update** - 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 **Browse**, 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.

23.8.5.1. 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.

23.8.6. 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 710 The Email Properties dialog

The fields and checkboxes 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** check-box to include the end user's userid, password and the Reportal portal ID in the email.
 - **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.

Note! 11 users will receive this email

Email Preview

To user@company.com
From documentation@confirmit.com
Subject Example email
Body Plain Text This is an example of an email.
User id: UserName
Set password: Link to page where user can set password
Portal id: 948460

http://reportal.testlab.firmglobal.net/reportal/default.aspx?portalid=948460

Cancel < Back Next > Finish

Figure 711 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.

Note! 11 users will receive this email

Task Properties

Comment

Start Time ASAP

Cancel < Back Next > Finish

Figure 712 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).

23.8.6.1. 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 713 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.

23.9. 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 714 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.

23.9.1. 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.

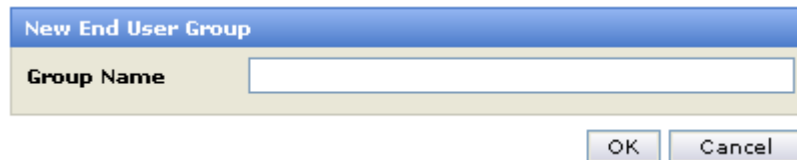
A screenshot of a dialog box titled "New End User Group". It has a blue header bar with the title. Below the header, there is a label "Group Name" followed by a text input field. At the bottom right of the dialog, there are two buttons: "OK" and "Cancel".

Figure 715 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.

23.9.2. 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 the How to Add a New User to a List section on page 557 for more information).
- **Groups** – use this tab to add groups to the group (see the How to Add a New Group to the List section on page 564 for more information).
- **Published Online Reports** – use this tab to add published online reports to the group.

23.9.2.1. 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.

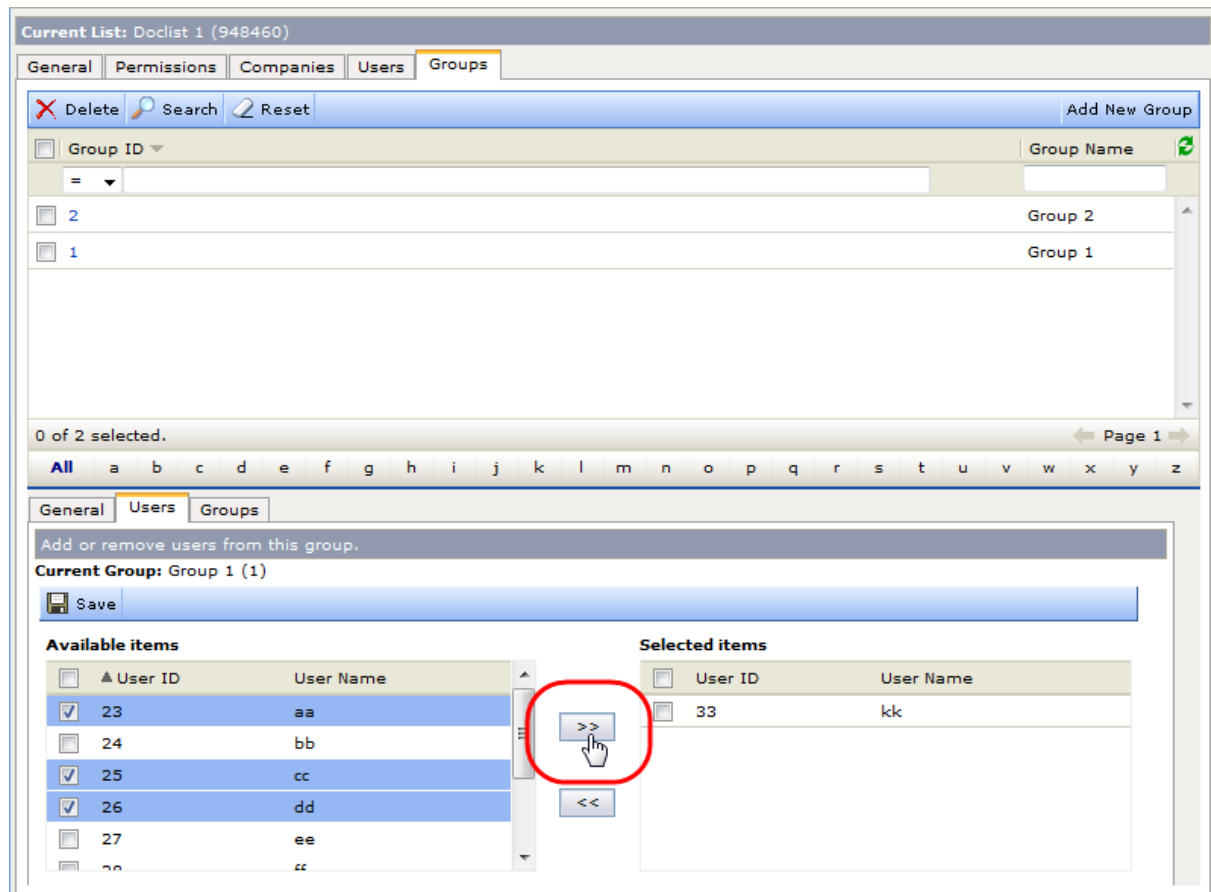


Figure 716 Example of the Groups > Users tab

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.

23.9.2.2. 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.

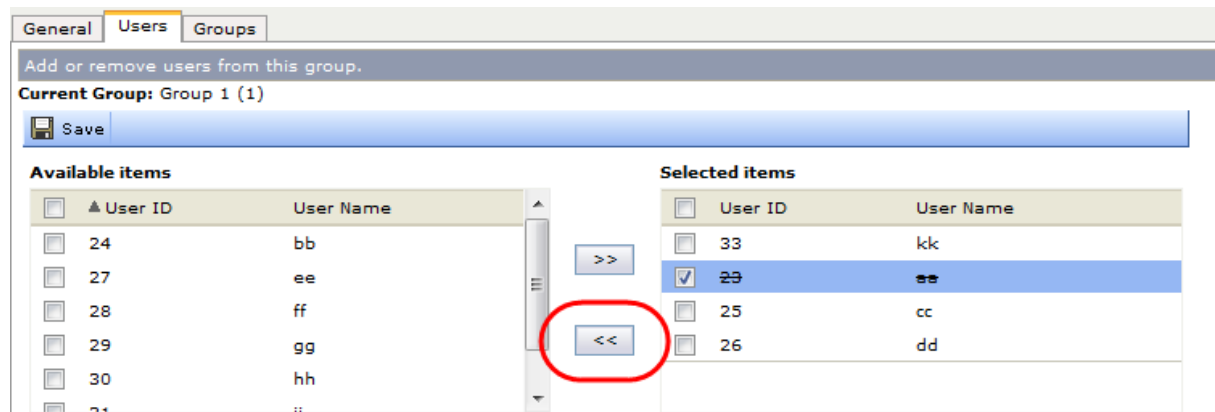


Figure 717 Removing users from a Group

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.

23.9.2.3. 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.

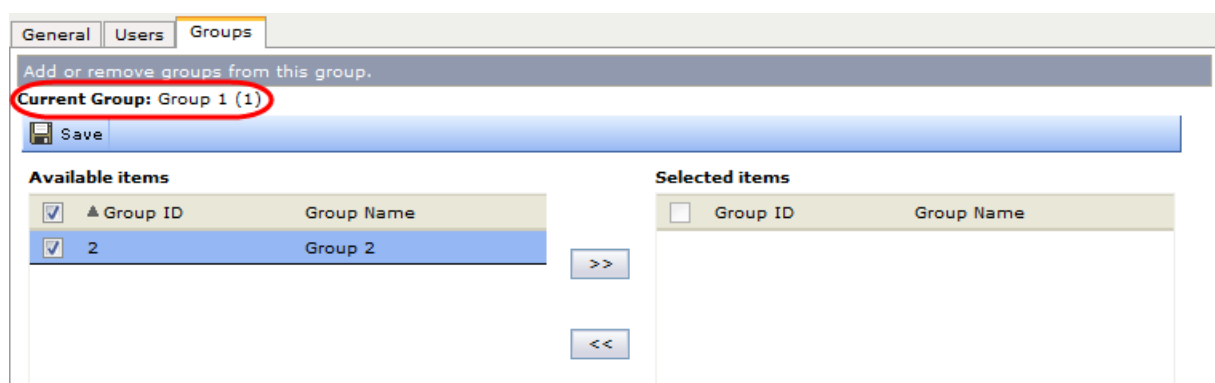


Figure 718 Example of the Groups tab for a group

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.

24. 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 The Online Coding Tool section on page 487 for more information).

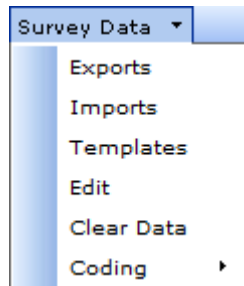


Figure 719 The Survey Data menu

24.1. 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 project 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.

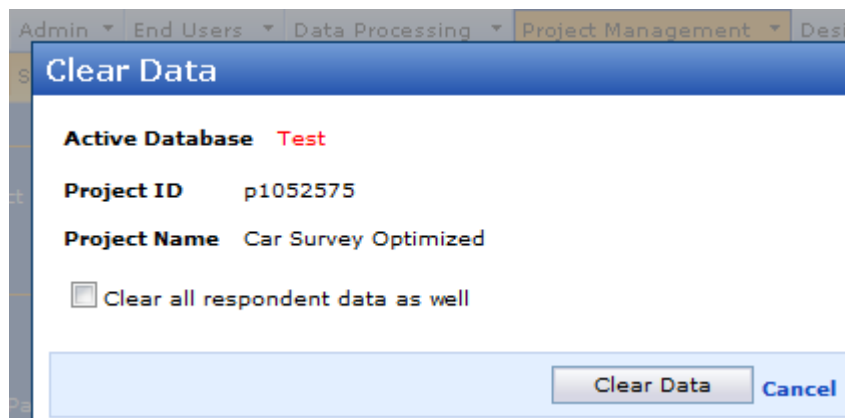


Figure 720 The Clear Data overlay

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.

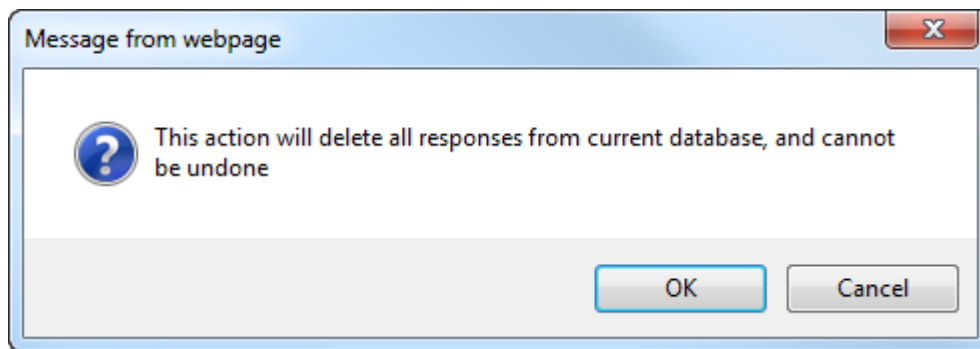


Figure 721 The Confirm deletion warning

4. Click **OK** to continue and delete the data, **Cancel** to abort the operation.

24.2. 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.

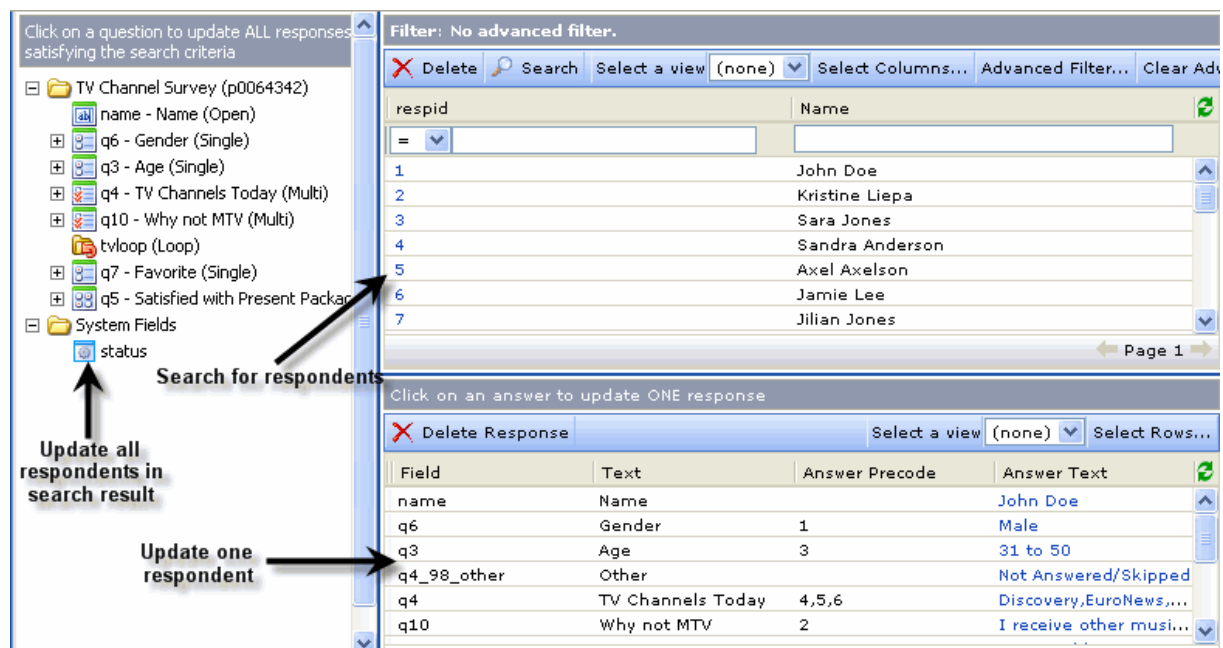


Figure 722 Example of the Edit Survey Data window

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 The Optimized Database Format section on page 31 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.

24.2.1. 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.

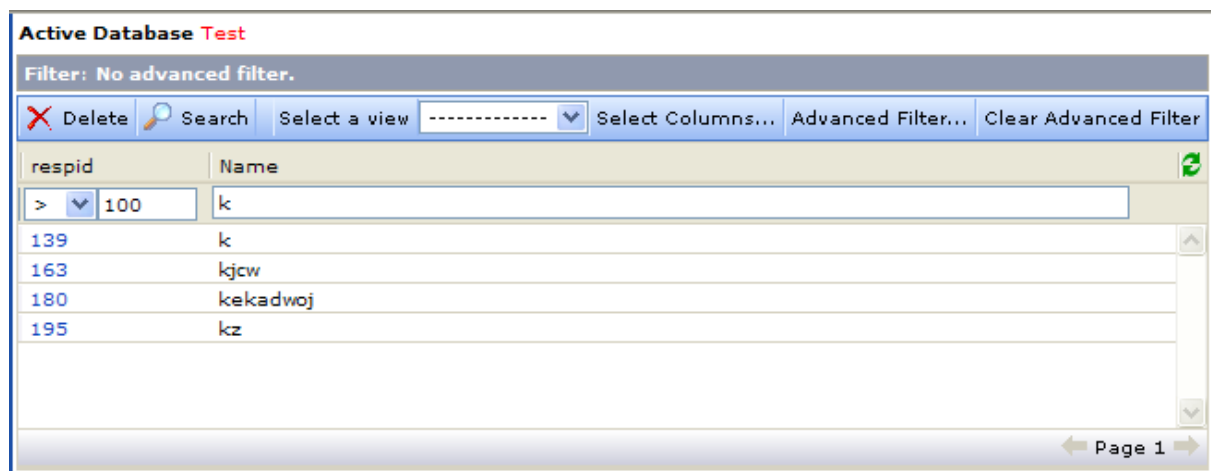


Figure 723 The Search frame

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 the Standard Search section on page 571 for more information)
- Advanced search (see the Advanced Search section on page 571 for more information)

24.2.1.1. 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.

24.2.1.2. Advanced Search

The Advanced Search functionality enables you to set up more advanced expressions involving any variables from the survey(see the The Advanced Filter Designer section on page 530 for more information)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 The Advanced Filter Designer section on page 530 for more information)

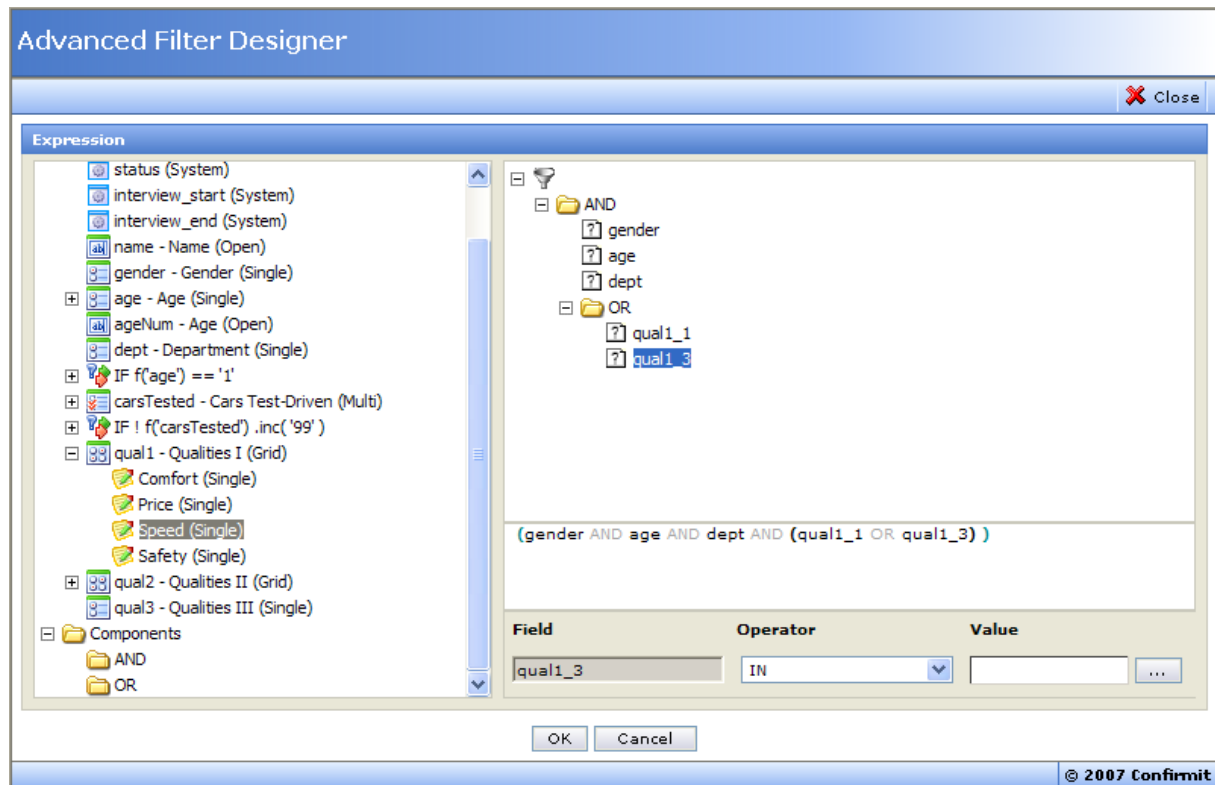


Figure 724 Example of the Advanced Filter Designer

- To remove the filter, click **Clear Advanced Filter**.

24.2.2. 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.

Select Columns
Select from the available items below

Confirmit.
everywhere

Close

Select action on views
Update Default

Find
Find what: Find
☐ Match case
☐ Match whole words only

Available items

- ☐ Form Name
- ☐ q23 (Personalized Single)
- ☐ q3 (Gender)
- ☐ q4 (Age)
- ☐ q5_2 (Cars test-driven_Ford)
- ☐ q5_3 (Cars test-driven_Chrysler)
- ☐ q5_5 (Cars test-driven_Volvo)
- ☐ q5_6 (Cars test-driven_BMW)

>> <<

Selected items

- ☐ Form Name
- ☐ q2 (Name)

OK Cancel

Figure 725 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 the Views section on page 573 for more information).

24.2.3. 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**.

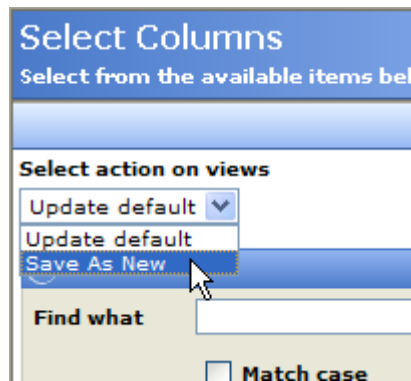


Figure 726 Selecting Save as New

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.

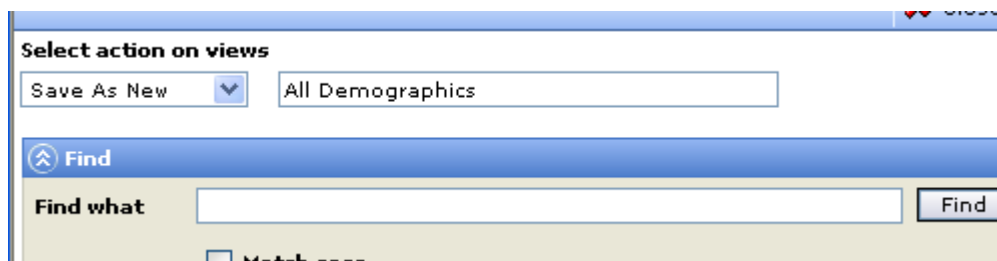


Figure 727 Naming the View

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.

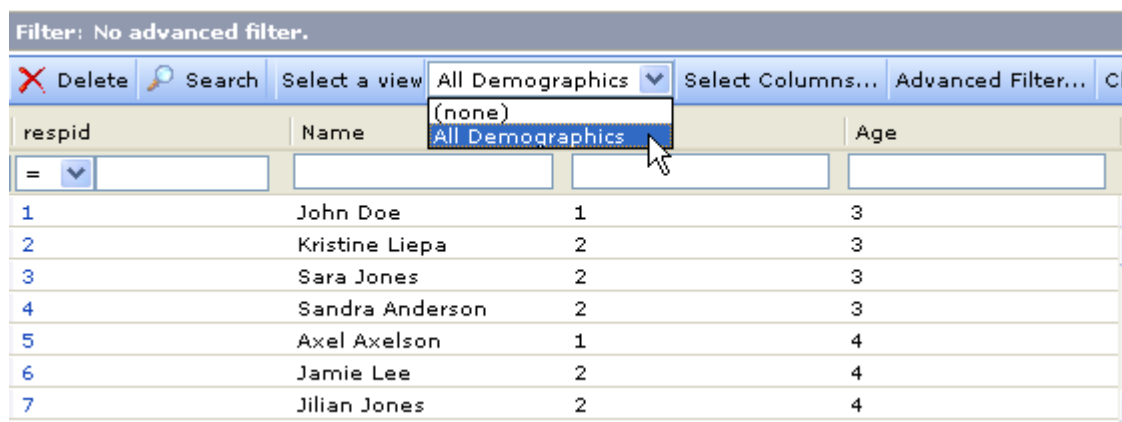


Figure 728 Selecting a View from the drop-down list

24.2.4. 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".

24.2.5. 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.

Answer Precode	Answer Text
☐ 1	Male
☐ 2	Female

Page 1

All a b c d e f g h i j k l m n o p q r s t u v w x y z

Not answered ☐ **OK** **Cancel**

Figure 729 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 730 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 731 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** check box. 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.

24.2.6. 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.

Filter: No advanced filter.

All Demographics

respid	Name	Gender	Age
=			
1	John Doe	1	3
2	Kristine Liepa	2	3
3	Sara Jones	2	3
4	Sandra Anderson	2	3
5	Axel Axelson	1	4
6	Jamie Lee	2	4
7	Jilian Jones	2	4
8	Jeniffer Twins	2	3
-	-	-	-

Page 1

Click on an answer to update ONE response

(none)

Field	Text	Answer Precode	Answer Text
name	Name		John Doe
q6	Gender	1	Male
q3	Age	3	31 to 50
q4_98_other	Other		Not Answered/Skipped
q4	TV Channels Today	4,5,6	Discovery,EuroNews,BBC World
q10	Why not MTV	2	I receive other music channels
q7	Favorite	6	BBC World
q5_1	News	2	Good
q5_2	Sports	2	Good

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Figure 732 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 the Views section on page 573 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" check box, as shown below.

Figure 733 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 answerlist (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" check box.

Figure 734 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 735 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.

24.3. Data Transfer

Survey data (the respondents' answers to the questions in the surveys) can be exported from and imported to Confirmit projects. 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.

Note: The Data Export/Import wizard introduced with the Optimized database format is the only user interface now available.

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.

24.3.1. 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 projects.

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.

24.3.2. Exporting Data

The Data Export/Import wizard introduced with the Optimized database format is now the only user interface available. Note that the dialog and options for step 2 of the procedure will depend on the export format that you select in step 1.

24.3.2.1. Exporting Data - Step 1

To export data from a project:

1. With the project open, go to the **Survey Data > Exports** menu command.

The first stage of the Export dialog opens.

Export

Project ID p1052575

Active Database Production

Format Excel File

Filter

Interview Status Filter

☒ Complete Responses

☐ Incomplete Responses

☐ Screened

☐ Quota Full

☐ Error

☐ All (unfiltered)

Expression

Relative Date Filter

☐

From

Months Days Hours Minutes

Months Days Hours Minutes

To

Months Days Hours Minutes

Fixed Date Filter

☐

Start Date

End Date

Data to be included All Data (Only applies to recurring tasks)

Figure 736 The first stage of the Export dialog

The information displayed, and the options available, are as follows:

- **Project Id** - the identification number of the project 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 project 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.
- **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.
- **Fixed 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.

- **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.

- o Excel
- o Excel File (Answer Codes as Labels)
- o Delimited Text File
- o Delimited Text File (Answer Codes as Labels)
- o Confirmit Extended Triple-S XML file
- o Triple-S XML (Standard)
- o SPSS
- o Quantum
- o SAS file
- o Fixed width file

24.3.2.1.1. 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:**
 - o Months = 1.
 - o Days = (not specified).
 - o Hours = (not specified).
 - o Minutes = (not specified).
- **Interval end:**
 - o Months = (not specified).
 - o Days = (not specified).
 - o Hours = (not specified).
 - o 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:

$$(2 \text{ months} + 3 \text{ days}) - (1 \text{ months} + 5 \text{ hours} + 30 \text{ minutes}) = (1 \text{ months} + 2 \text{ days} + 18 \text{ hours} + 30 \text{ minutes}).$$

To perform a data export for the above-mentioned interval, enter the following specifications in export properties:

- **Interval start:**
 - o Months = 2.
 - o Days = 3.
 - o Hours = (not specified).
 - o Minutes = (not specified).
- **Interval end:**
 - o Months = 1.
 - o Days = (not specified).
 - o Hours = 5.
 - o Minutes = 30.

24.3.2.2. 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'.

Export Properties

Excel Version Microsoft Excel 97-2003

Locale English (United Kingdom) ?

Truncate Open Ends 200 ☐ No Truncation (Full Length) ?

Loop Handling Separate Files ?

Position of Loop Variables As in questionnaire

Variables to Include (Survey data template) ☐ ?

Override Filename ☐

Export Language English

Text in Question Labels Question ID

Text in Answer Element Labels Answer Label (Question Label)

Figure 737 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 specified. The variables may be split over several worksheets. Excel exports will never be made in Excel 4.0 and older, since these old versions do not support more than one worksheet for each workbook. The variable names will be in the first row.
- **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 will take significantly longer to execute.
- **Loop Handling** - this option is only available if the project included loops. Here you specify how loops are to be handled for the export. The options are:
 - o **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 project 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 project 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 (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.
- **Override Filename** - allows you to override the system-generated file name. Tick this check-box to open the file name text-box. Here you can edit the system-generated name. 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 project 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.
 - o **Text only** - the label element will contain only the text of the question.
 - o **Title only** - the label element will contain only the title of the question.
 - o **Title and Text** - the label element will contain the question title followed by - followed by the question text.
 - o **Question ID** - the label element will contain the question id.
- **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:
 - o **Answer (Question Label)** - the question label is placed after the answer element.
 - o **Question Label (Answer)** - the question label is placed before the answer element.
 - o **Answer** - the answer element is placed without the question label.

Note: When exporting to Excel, the column header text will be truncated to 64 characters. Note that this limitation does not exist in the Delimited Text File export, which can be used instead. The text file output can then be opened and processed as required in Excel.

When you have made the appropriate selections, click **Next** to go to the third stage of the dialog.

24.3.2.3. 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.

Export Properties

Delimiter	Tab	
Custom Delimiter		
Quoted Values	☐	
Locale	English (United Kingdom)	
Truncate Open Ends	200	☐ No Truncation (Full Length)
Open End Handling	Include Open Ends	
File Encoding	UTF-8	
Loop Handling	Single File	
Loop Position	As in Questionnaire	
Variables to Include (Survey data template)	☐ Select template	
Override Filename	☐	
Export Language	English	
Text in Question Labels	Question ID	
Text in Answer Element Labels	Answer Label (Question Label)	

Figure 738 The second stage of the Export dialog for a Delimited Text File export

Make the appropriate selections. The options are as follows:

- **Delimiter** - 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.
- **Quoted Values** - in some cases when exporting to Delimited Text File, commas will be removed from the answers to Open Text questions during the export. Check this box to ensure the commas are retained in the answers.
- **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:
 - o **Include Open Ends** - all open end questions are included in the export.
 - o **Exclude Open Ends** - no open end questions are included in the export.
 - o **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).
 - o **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 project 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 project 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 project 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.
- **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 check-box to open the file name text-box. Here you can edit the system-generated name. 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 project 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 type of question labels you wish to use. The options are:
 - o **Text only** - the label element will contain only the text of the question.
 - o **Title only** - the label element will contain only the title of the question.
 - o **Title and Text** - the label element will contain the question title followed by the question text.
 - o **Question ID** - the label element will contain the question id.

- **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:
 - o **Answer (Question Label)** - the question label is placed after the answer element.
 - o **Question Label (Answer)** - the question label is placed before the answer element.
 - o **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.

24.3.2.4. 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.

Export Properties	
Loop Handling	Single File
Loop Position	As in Questionnaire
Triple-S Version	Triple-S XML 2.0
Triple-S Format	Fixed Width
Multi Question Format	BitString
Truncate Open Ends	100
Data File Encoding	ANSI
Schema File Encoding	UTF-8
Data Only (no schema)	☐
Recode Multis	☐
Variables to Include (Survey data template)	☐ Select template
Exclude Hierarchy/Table Lookup Labels	☐
Override Filename	☐
Export Language	English
Text in Question Labels	Text Only
Text in Answer Element Labels	Answer Label (Question Label)

Figure 739 The second stage of the Export dialog for a Triple-S XML file export

Make the appropriate selections. The options are as follows:

- o **Loop Handling** - this option is only available if the project 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 project 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 project 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.
- **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.
- **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.

- **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 check-box to open the file name text-box. Here you can edit the system-generated name. 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 project 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 type of question labels you wish to use. The options are:
 - o **Text only** - the label element will contain only the text of the question.
 - o **Title only** - the label element will contain only the title of the question.
 - o **Title and Text** - the label element will contain the question title followed by - followed by the question text.
 - o **Question ID** - the label element will contain the question id.
- **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:
 - o **Answer (Question Label)** - the question label is placed after the answer element.
 - o **Question Label (Answer)** - the question label is placed before the answer element.
 - o **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.

24.3.2.4.1. 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.

24.3.2.5. 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 On-Demand 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 or SAV, then the dialog that opens in step 2 will be as shown below.

Export Properties

Character Encoding UTF-8

Decimal Delimiter Point (.)

Truncate Open Ends 50

Loop Handling Single File

Loop Position As in Questionnaire

Variables to Include (Survey data template) ☐

Exclude Hierarchy/Table Lookup Labels ☐

Override Filename ☐

Export Language English

Text in Question Labels Text Only

Text in Answer Element Labels Answer Label (Question Label)

Cancel < Back Next > Finish

Figure 740 The second stage of the Export dialog for an SPSS DAT or SAV 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.
- **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 project 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 project 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 project 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.
- **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 check-box to open the file name text-box. Here you can edit the system-generated name. 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 project 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.
 - o **Text only** - the label element will contain only the text of the question.
 - o **Title only** - the label element will contain only the title of the question.
 - o **Title and Text** - the label element will contain the question title followed by - followed by the question text.
 - o **Question ID** - the label element will contain the question id.
- **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:
 - o **Answer (Question Label)** - the question label is placed after the answer element.
 - o **Question Label (Answer)** - the question label is placed before the answer element.
 - o **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.

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).

24.3.2.6. 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 741 The second stage of the Export dialog for a Quantum or SAS file export

Make the appropriate selections. The options are as follows:

- o **Loop Handling** - this option is only available if the project 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 project 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 project 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.
- **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 check-box to open the file name text-box. Here you can edit the system-generated name. 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 project 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.
 - o **Text only** - the label element will contain only the text of the question.
 - o **Title only** - the label element will contain only the title of the question.
 - o **Title and Text** - the label element will contain the question title followed by - followed by the question text.
 - o **Question ID** - the label element will contain the question id.
- **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:
 - o **Answer (Question Label)** - the question label is placed after the answer element.
 - o **Question Label (Answer)** - the question label is placed before the answer element.
 - o **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.

24.3.2.7. 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 742 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.
- **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 (default), Unicode or UTF-8 character encoding. This property defines the encoding for the schema file.
- o **Loop Handling** - this option is only available if the project 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 project 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 project 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 projects with loops, instead of exporting the loop data in different files, you can export all data belonging to a project 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 check-box to open the file name text-box. Here you can edit the system-generated name. 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 project 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 type of question labels you wish to use. The options are:
 - o **Text only** - the label element will contain only the text of the question.
 - o **Title only** - the label element will contain only the title of the question.
 - o **Title and Text** - the label element will contain the question title followed by - followed by the question text.
 - o **Question ID** - the label element will contain the question id.
- **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:
 - o **Answer (Question Label)** - the question label is placed after the answer element.
 - o **Question Label (Answer)** - the question label is placed before the answer element.
 - o **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.

24.3.2.8. Exporting Data - Step 3

The third stage of the Export dialog opens. This dialog is common for all export formats.

Figure 743 The third stage of the Export dialog

Make the appropriate selections. The information displayed, and the options available, are as follows:

- **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.
- **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.
- **Recipient email** - if Email is selected in File Transfer above, this is the email address to which the email will be sent. Check that the recipient's email address is correct.
- **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 The Task Properties Recurrence Tab section on page 47 for more information).
- **Comment** - you can add comments that are included in the export email.

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 the Standard Users section on page 2 for more information) has a simplified procedure with fewer steps and options in the wizard.

24.3.3. Importing Data

Response data from other systems or from other Confirmit projects 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: The Data Export/Import wizard introduced with the Optimized database format is now the only user interface available.

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.

24.3.3.1. 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.

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 project'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 project'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 projects 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.

24.3.3.2. Importing Data - Step 1

To import data:

1. Go to the **Survey Data > Imports** menu command.

The Data Import dialog opens.

Figure 744 The Data Import dialog

The information displayed, and the options available, are as follows:

- **Project Id** - the identification number of the project 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 dialog displayed in the next step in the Import procedure will differ depending on the format you select here.
- **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. Note that fetching from FTP can allow automation of data flows, since files can then be picked up automatically.
- **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.

- **File handling** - if you have selected Pick up from FTP, select whether you wish to copy the file from the server/FTP site or move it (delete it from the site).
- 2. Select the format of the file to be imported then select the import source (server or FTP).
- 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 FTP location, type the file name into the "Pick up from FTP location" field.

- 2. Check the Encrypted File box if appropriate.
- 3. 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.

24.3.3.3. 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 745 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 The General Tab section on page 184 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 executor 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.

- o **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.
- o **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.
- o **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.

24.3.3.4. 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 746 The second stage of the Export dialog for a Delimited Text File import

The options are as follows:

- **Delimiter** - 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.
- **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.
- **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.
- **Open Ends truncation** - 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 The General Tab section on page 184 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 executor 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.

- o **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.
- o **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.
- o **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.

24.3.3.5. 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.
- **Triple-S 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 The General Tab section on page 184 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.
 - o **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.
 - o **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.
 - o **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.

24.3.3.6. Importing Data - Step 3

The third stage of the Import Properties dialog opens as shown. This dialog is common for all import formats.

Figure 747 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 project 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 The Task Properties Recurrence Tab section on page 47 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.

24.3.4. 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 an On-Demand 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 the How to Conduct an Ascribe™ Schema Export section on page 602 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 the How to Conduct an Ascribe™ Schema Import section on page 606 for more information).

24.3.4.1. How to Conduct an Ascribe™ Schema Export

The Ascribe™ schema export will result in an 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.

Ascribe Export™

Properties

Project is set to use Optimized Database Format. Questions with loop references will not be included in the export.

To obtain data for coding in Ascribe™ you must export tab-delimited data from the survey data menu. Where applicable, use separate files for loop data.

Project ID: p0973638

Active Database: Production

Language: English

Questions: All

File transfer: Email

Recipient email: documentation@confirmit.com

Comment:

Start time: ASAP

OK Cancel

Figure 748 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:

- **Project ID** - the identification number for the current project.
- **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.

Properties (Changes made)

Multi Question - (q4)

General Advanced WI Features

List rows: 2

List columns: 2

Field width:

Open text: ☐

Numeric: ☐

Ranking: ☐

Opentext coding: ☒

Coding of: q2_98_other

Answer list display order: Randomized

Figure 749 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 to 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 project 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 the Data Transfer Encryption and FTP section on page 4 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.

24.3.4.2. 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 project task.

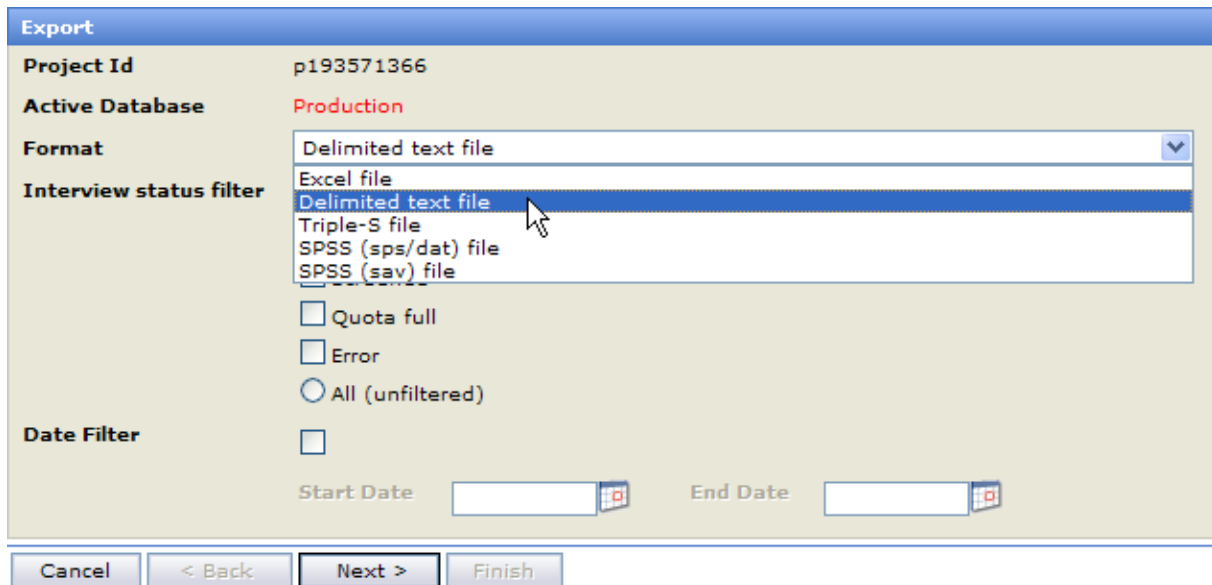
The Ascribe™ FTP option will only be available if the export options selected adhere to the data type required by Ascribe™, these are:

- 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 project, go to the **Survey Data > Exports** menu command.
The Export dialog opens.



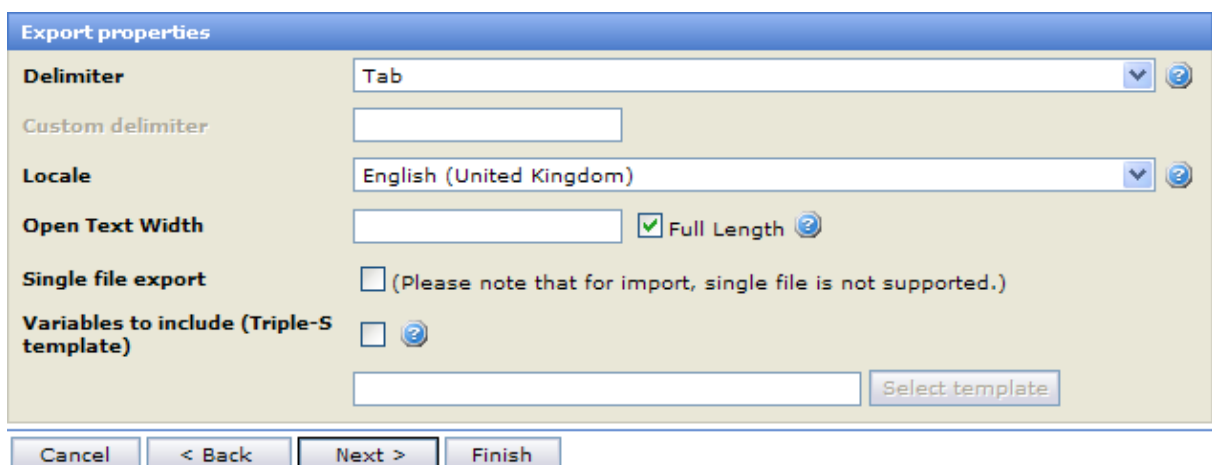
The **Export** dialog box is shown. It contains the following fields and options:

- Project Id:** p193571366
- Active Database:** Production
- Format:** A dropdown menu with options: Delimited text file (selected), Excel file, Triple-S file, SPSS (sps/dat) file, and SPSS (sav) file.
- Interview status filter:** A list of checkboxes: Quota full, Error, and All (unfiltered) (selected).
- Date Filter:** A checkbox (unchecked).
- Start Date:** A text field with a calendar icon.
- End Date:** A text field with a calendar icon.
- Buttons at the bottom: Cancel, < Back, Next >, and Finish.

Figure 750 The Export dialog

2. Select the Format to be **Delimited text file**, then click **Next**.

The Export Properties dialog opens.



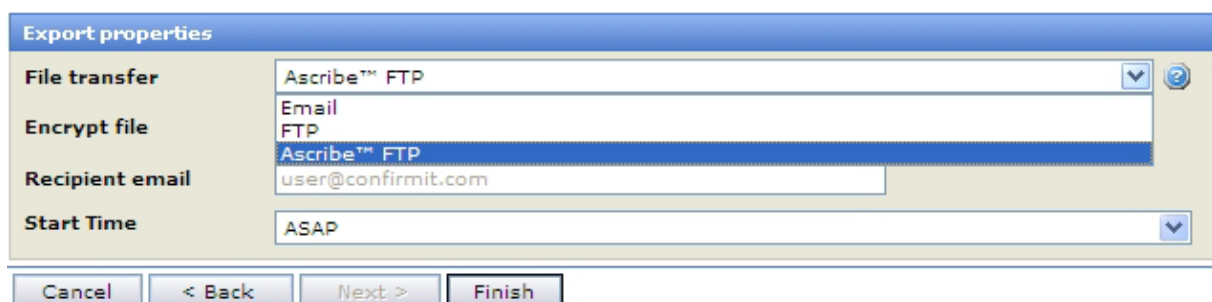
The **Export properties** dialog box is shown. It contains the following fields and options:

- Delimiter:** A dropdown menu with 'Tab' selected.
- Custom delimiter:** A text field.
- Locale:** A dropdown menu with 'English (United Kingdom)' selected.
- Open Text Width:** A text field with a checkbox for 'Full Length' (checked).
- Single file export:** A checkbox (unchecked) with the text '(Please note that for import, single file is not supported.)'.
- Variables to include (Triple-S template):** A checkbox (unchecked) with a question mark icon.
- Select template:** A button.
- Buttons at the bottom: Cancel, < Back, Next >, and Finish.

Figure 751 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.



The **Export properties** dialog box is shown, now with the following fields and options:

- File transfer:** A dropdown menu with 'Ascribe™ FTP' selected.
- Encrypt file:** A dropdown menu with 'FTP' selected.
- Recipient email:** A text field with 'user@confirmit.com' entered.
- Start Time:** A dropdown menu with 'ASAP' selected.
- Buttons at the bottom: Cancel, < Back, Next >, and Finish.

Figure 752 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.

24.3.4.3. How to Conduct an Ascribe™ Schema Import

When the open text responses have been exported to Ascribe™ (see the How to Conduct an Ascribe™ Schema Export section on page 602 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 box opens.

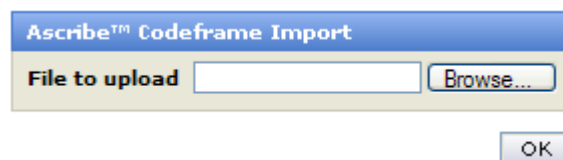


Figure 753 The Ascribe™ Import dialog

2. Click **Browse** to open a standard Windows file browser, then browse to and select the file you wish to import.
3. Click **OK**.

The file is imported. Each new variable is added to the questionnaire tree immediately after its corresponding "original" variable.

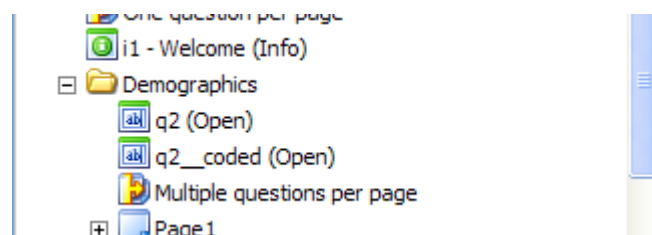


Figure 754 Example of an Ascribe™ variable added to the questionnaire tree

25. 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
- **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. This is a limit within the database, so it cannot be exceeded by for example uploading several times.

Note: The respondent table 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.

Meta data

- **Question title** - 255 characters
- **Question text** - Unlimited
- **Question instructions** - Unlimited
- **Answer/scale texts** - 2000 characters
- **Question ids** - 50 characters
- **Codes** - 32 characters (default). Only alphanumeric characters and underscore (_), no white space. The project 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** - Unlimited
- **Validation code** - Unlimited
- **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

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 many 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.

26. APPENDIX B: CONFIRMIT LANGUAGE CODES

Important!

Custom languages that are added after the initial release of Confirmit are assigned a Language code number automatically, based on the order in which the languages are added. Custom languages may therefore have different language IDs for each installation of Confirmit (On-Premise, On-Demand Euro, On-Demand US). Therefore, be aware that if you intend to export/import surveys between the different environments (On-Premise/Euro/US/) and you are using custom languages, you should check the relevant language codes for the sites 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, available on that server.

Language code	Language	Sub name	Combident
54	Afrikaans		af
28	Albanian		sq
1	Arabic		ar
1025	Arabic	Saudi Arabia	ar_sa
2049	Arabic	Iraq	ar_iq
3073	Arabic	Egypt	ar_eg
4097	Arabic	Libya	ar_li
5121	Arabic	Algeria	ar_al
6145	Arabic	Morocco	ar_mo
7169	Arabic	Tunisia	ar_tu
8193	Arabic	Oman	ar_om
9217	Arabic	Yemen	ar_ye
10241	Arabic	Syria	ar_sy
11265	Arabic	Jordan	ar_jo
12289	Arabic	Lebanon	ar_le
13313	Arabic	Kuwait	ar_ku
14337	Arabic	U.A.E.	ar_ua
15361	Arabic	Bahrain	ar_ba
16385	Arabic	Qatar	ar_qa
43	Armenian		hy
77	Assamese		as

44	Azeri		az
1068	Azeri	Latin	az_la
2092	Azeri	Cyrillic	az_cy
45	Basque		eu
35	Belarusian		be
69	Bengali		bn
2	Bulgarian		bg
3	Catalan		ca
4	Chinese		zh
1028	Chinese	Taiwan	zh_ta
2052	Chinese	PRC	zh_pr
3076	Chinese	Hong Kong SAR, PRC	zh_hk
4100	Chinese	Singapore	zh_si
5124	Chinese	Macau SAR	zh_ma
518	Croatian		hr
5	Czech		cs
6	Danish		da
19	Dutch		nl
1043	Dutch	Netherlands	nl_nl
2067	Dutch	Belgium	nl_be
9	English		en
1033	English	United States	en_us
2057	English	United Kingdom	en_uk
3081	English	Australia	en_au
4105	English	Canada	en_ca
5129	English	New Zealand	en_nz
6153	English	Ireland	en_ir
7177	English	South Africa	en_sa
8201	English	Jamaica	en_ja
9225	English	Caribbean	en_ca

10249	English	Belize	en_be
11273	English	Trinidad	en_tr
12297	English	Zimbabwe	en_zi
13321	English	Philippines	en_ph
37	Estonian		et
56	Faeroese		fo
41	Farsi		fa
11	Finnish		fi
12	French		fr
1036	French	Standard	fr_fr
2060	French	Belgium	fr_be
3084	French	Canada	fr_ca
4108	French	Switzerland	fr_sw
5132	French	Luxembourg	fr_lu
6156	French	Monaco	fr_mo
55	Georgian		ka
7	German		de
1031	German	Standard	de_de
2055	German	Switzerland	de_sw
3079	German	Austria	de_au
4103	German	Luxembourg	de_lu
5127	German	Liechtenstein	de_li
8	Greek		el
71	Gujarati		gu
13	Hebrew		he
57	Hindi		hi
14	Hungarian		hu
15	Icelandic		is
33	Indonesian		id

16	Italian		it
1040	Italian	Standard	it_it
2064	Italian	Switzerland	it_sw
17	Japanese		ja
75	Kannada		kn
96	Kashmiri		ks
2144	Kashmiri	India	ks_in
63	Kazak		kk
87	Konkani		ki
18	Korean		ko
1042	Korean	Korea	ko_ko
2066	Korean	Johab	ko_jo
38	Latvian		lv
39	Lithuanian		lt
1063	Lithuanian	Lithuania	lt_lt
2087	Lithuanian	Classic	lt_cl
47	Macedonian		mk
62	Malay		ms
1086	Malay	Malaysian	ms_ms
2110	Malay	Brunei Darussalam	ms_br
76	Malayalam		ml
515	Maltese		mlt
88	Manipuri		ma
78	Marathi		mr
97	Nepali		ne
2145	Nepali	India	ne_in
20	Norwegian		no
1044	Norwegian	Bokmål	no_bo
2068	Norwegian	Nynorsk	no_ny
72	Oriya		or

21	Polish		pl
22	Portuguese		pt
1046	Portuguese	Brazil	pt_br
2070	Portuguese	Standard	pt_st
70	Punjabi		pa
24	Romanian		ro
25	Russian		ru
79	Sanskrit		sa
26	Serbian / Croatian		sr
1050	Serbian / Croatian	Croatian	sr_yu
2074	Serbian / Croatian	Latin	sr_la
3098	Serbian / Croatian	Cyrillic	sr_cy
89	Sindhi		sd
27	Slovak		sk
36	Slovenian		sl
10	Spanish		es
1034	Spanish	Traditional Sort	es_es
2058	Spanish	Mexican	es_me
3082	Spanish	Modern Sort	es_ms
4106	Spanish	Guatemala	es_gu
5130	Spanish	Costa Rica	es_cr
6154	Spanish	Panama	es_pa
7178	Spanish	Dominican Republic	es_dr
8202	Spanish	Venezuela	es_ve
9226	Spanish	Colombia	es_co
10250	Spanish	Peru	es_pe
11274	Spanish	Argentina	es_ar
12298	Spanish	Ecuador	es_eq
13322	Spanish	Chile	es_ch

14346	Spanish	Uruguay	es_ur
15370	Spanish	Paraguay	es_pa
16394	Spanish	Bolivia	es_bo
17418	Spanish	El Salvador	es_el
18442	Spanish	Honduras	es_ho
19466	Spanish	Nicaragua	es_ni
20490	Spanish	Puerto Rico	es_pr
65	Swahili		sw
29	Swedish		sv
1053	Swedish	Sweden	sv_sv
2077	Swedish	Finland	sv_fi
73	Tamil		ta
68	Tatar		tt
74	Telugu		te
30	Thai		th
31	Turkish		tr
34	Ukrainian		uk
32	Urdu		ur
1056	Urdu	Pakistan	ur_pa
2080	Urdu	India	ur_in
67	Uzbek		uz
1091	Uzbek	Latin	uz_la
2115	Uzbek	Cyrillic	uz_cy
42	Vietnamese		vi

On-Demand only:
 Confirmit has added some extra languages to the On-Demand 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.

27. APPENDIX C: RESERVED KEYWORDS

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 (except _), so "Anyone" can be used.

The Underscore (_) character (a question ID must not start with _).

A

action

aggregated

all

and

any

avg

between

by

C

callback

comment

con

conn

contains

convert

count

createddate

datebetween

env

eq

ge

group

gt

in_use

interview_end

interview_start

interviewer

interviewerid

isfalse

istrue

iterationid

I (except for use under special conditions (see the Handling Respondents in Multilingual Projects section on page 417 for more information))

L (except for use under special conditions (see the Handling Respondents in Multilingual Projects section on page 417 for more information)

last_handled

le

lt

ne

never_again

noofemailssent

not

not_in_quota

notin

or

order

package

page

panelid

panelist_created_date

panelistid

panelist_modified_date

projectid

PValDate

PValInHier

PValNum

PValStr

PValStrArr

R

Recoding

respid

responseid

rid

right

Rolling

rowguid

S

sample_category

select

source_projectid

source_responseid

State

state

status

stpstatus

to

todate

tries

unique_sourceid

with

The following can only be used in respondent lists:

userid

password

language

28. APPENDIX D: 3rd PARTY SOFTWARE COMPONENTS IN USE IN CONFIRMIT

Introduction

Confirmit is a product designed, developed, owned, maintained, marketed and sold by CONFIRMIT. Intellectual Property Rights (IPR) and international copyright is held by CONFIRMIT.

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Confirmit is a comprehensive product incorporating diverse integrated operational and technical functionality. To satisfy market expectations whilst maintaining the desired tempo of the development cycle, CONFIRMIT has been obliged to utilize 3rd Party Software Components.

This document was last revised 2011-01-19.

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