

CONFIRMIT AUTHORING USER GUIDE

C12.5 Revision 3

Copyright © 2008 by Confirmit. All Rights Reserved.

This document is intended only for registered Confirmit clients. No part of the contents of this document may be reproduced or transmitted in any form or by any means without the written permission of Confirmit.

Confirmit makes no representations or warranties regarding the contents of this manual, and specifically disclaims any implied warranties of merchantability or fitness for any particular purpose. The information in this manual is subject to change without notice.

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

The information herein describes Confirmit Authoring and its features as of August 2008. 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.

Table of Contents

Table of Contents **3**

What's New in this Issue? **15**

1. What is Confirmit? **1**
1.1. About this Manual 1
1.2. Types of Confirmit User 1
1.2.1. Advanced Users 1
1.2.2. Express Users 1
1.3. About Log-in Sessions 2
1.4. Security Issues 2
1.4.1. Secure Sockets Layer (SSL) 2
1.4.2. Object Security 2
1.4.3. Data Transfer Encryption and FTP 2
1.4.4. Respondent Security and Anonymity 3
1.4.5. Back up of Meta Data 3
1.4.6. Backup of Response Data 3
1.5. System Requirements 4
1.5.1. Confirmit Users 4
1.5.1.1. Preparing Websites with Active Content for Announced Browser Changes 6
1.5.2. Respondent Requirements 6
1.5.2.1. Respondents using AOL 7
1.5.2.2. Respondent Input in Netscape 7
1.5.3. 3rd Party Downloads 7

2. Starting Confirmit – a General Overview **9**
2.1. Logging into Confirmit 9
2.2. Getting Help 10
2.2.1. Online Videos 10
2.2.2. Context-Sensitive Help 11
2.2.3. The Help Information Page 11

3. Working in Confirmit **13**
3.1. Frames and Panes 13
3.2. Menus 13
3.2.1. The Home Menu 14
3.2.2. Project/Panel Menu 14
3.3. Toolboxes 15
3.4. Property Sheets 19
3.5. Drag-and-Drop Operations 19
3.6. Keyboard Shortcuts 20
3.7. Question and Answer Editing Modes 21
3.7.1. Text 21
3.7.2. Answer Lists and Scales/Lists 22
3.8. Logos 23
3.9. Language and Database Modes 23
3.10. The Optimized Database Format 24
3.11. Search Lists 25

4. Home **27**
4.1. Home Page 27
4.2. New 27
4.3. Recent 28
4.4. Projects 28
4.5. Basic Panels 29
4.6. Community Panels 29
4.7. Favorites 30
4.8. Archiving 30

4.9. Tasks 32
4.9.1. The Tasks Scheduled Tab 33
4.9.2. The Tasks Executing Tab 33
4.9.3. The Tasks Completed Tab 34
4.9.4. The Aborted Tasks Tab 34
4.9.5. The Recurring Tasks Tab 34
4.9.6. Searching in the Task Pane 35
4.9.7. How to Disable a Scheduled Task 35
4.9.8. Be Notified when a Task is Completed 35
4.9.9. The Task Properties Page 36
4.9.9.1. The Task Properties Recurrence Tab 36
4.9.9.2. The Task Properties Parameters Tab 38
4.9.9.3. The Task Properties Instances Tab 38
4.9.9.4. How to Change the Task Owner 39
4.10. Survey Layouts 40
4.10.1. Background and Benefits 40
4.10.1.1. Extensibility 40
4.10.1.2. Cleaner, More Logical Markup 40
4.10.1.3. Increased Portability 40
4.10.1.4. Greater Accessibility 40
4.10.1.5. CSS - Cascading Style Sheets 41
4.10.2. Accessing Survey Layouts 41
4.10.2.1. How to Access Global Survey Layouts 41
4.10.2.2. Global Survey Layout Permissions 43
4.10.2.3. How to Access Local Survey Layouts 45
4.10.3. Working with Survey Layouts 46
4.10.3.1. Themes 46
4.10.3.2. Page Layouts 51
4.10.3.3. Question Skins 51
4.10.3.4. HTML Styles 65
4.10.3.5. Applying a Survey Layout to a Survey 77
4.10.3.6. Dynamic Survey Layout 77
4.11. Templates 79
4.11.1. Web Interview Templates 80
4.11.1.1. Understanding the WI Template Environment 80
4.11.1.2. Creating a New Template 82
4.11.1.3. Published Report Templates 87
4.11.1.4. Pivot View Templates 87
4.11.2. MS PowerPoint Templates 87
4.11.3. Panel Templates 87
4.12. Community Portals 88
4.12.1. What is a Community Portal / Panelist / Panel 88
4.12.2. How to add a Community Portal to your Panel 89
4.12.2.1. Creating a new Community Portal within a Panel 90
4.12.2.2. Adding an Existing Community Portal Template to a Panel 90
4.12.3. Working with your Community Portal 91
4.12.3.1. Page Masters 91
4.12.3.2. Themes 92
4.12.3.3. Pages 96
4.12.3.4. Visual Components 101
4.12.3.5. Properties on a Community Portal 108
4.12.4. Managing your Community Portals 108
4.12.4.1. Publish your Community Portal 108
4.12.4.2. Testing your Community Portal 109
4.12.4.3. Managing your Community Portal within your Panel 109
4.12.4.4. Managing your Community Portal Templates 110
4.12.5. Editing your Page Masters and Portal Pages 111
4.12.5.1. Inserting Tables 111
4.12.5.2. Adding Rows and Columns 111
4.12.5.3. Deleting Table Cells, Rows and Columns 112
4.12.5.4. Table Properties 112

4.12.5.5. Cell Properties 114
4.12.5.6. HTML Mode 116
4.12.5.7. Free-form Text 117
4.12.5.8. Images 118
4.13. Import Survey Definition 119
4.14. User Settings 120
4.15. Help 122
4.16. Exiting Confirmit 122
5. File Library 123
5.1. Limitations 123
5.2. General Information 123
5.3. How to Upload Files to the File Library 124
5.4. Moving and Copying Files 127
5.5. Using Images and Other Files From the File Library 128
5.5.1. How to Include an Image in a Text Field 128
5.5.2. How to Include an Image in an Answer Field 128
5.5.3. How to Resize and Delete an Image 130
5.6. Files in CAPI Surveys 131
6. Project Management 132
6.1. Overview 132
6.1.1. The General Tab 132
6.1.1.1. The Project Titles and Info Fields 134
6.1.1.2. The Administrator Info Field 134
6.1.1.3. The Check Growth Field 135
6.1.2. Permissions 136
6.1.2.1. How to Add Users 137
6.1.3. The Active Languages Tab 138
6.1.4. Project Status 138
6.1.5. URL Setup 139
6.1.6. Duplicating a Project 140
6.1.7. Deleting a Project 140
6.1.8. Recurring Tasks 140
6.2. Interview Progress 140
6.3. Project Log 141
6.4. Export Survey Definition 142
6.4.1. Some Details on XML Export 142
6.5. Confirmit Express 143
6.5.1. How to Convert a Project from Express to Professional 143
6.5.2. How to Approve an Express Survey 143
7. Designing Questionnaires 145
7.1. Creating a New Questionnaire 145
7.2. How to Add New Objects to the Questionnaire Tree 147
7.2.1. The Forms 147
7.2.2. Read-Only Access to a Form 150
7.2.3. Editing a Form 150
7.2.3.1. Question ID 150
7.2.3.2. Text 151
7.2.3.3. Answers 153
7.2.3.4. Scale 159
7.2.3.5. Triggers 159
7.2.3.6. Validation 160
7.2.3.7. Masking 160
7.2.3.8. Preview 160
7.2.3.9. Results 160
7.2.3.10. Languages 160
7.2.3.11. Question Properties 160
7.2.3.12. Lists 165
7.2.3.13. Searchable Answer Lists 166

7.2.4. Conditions 168
7.2.4.1. Description of Fields 169
7.2.4.2. Condition Builder 169
7.2.5. Directives 171
7.2.6. Stop-objects 173
7.2.7. Scripts 174
7.2.8. Loops 174
7.2.8.1. Defining a Loop in the Legacy Database Format 174
7.2.8.2. Defining a Loop in the Optimized Database Format 175
7.2.8.3. The Fields and Columns in the Loop Details Page 176
7.2.8.4. The Loop Properties Page 176
7.2.9. 3D – Grid 177
7.2.9.1. How to Add a 3D Grid Object to a Questionnaire 177
7.2.9.2. How to Edit a 3D Grid 178
7.2.9.3. How to Highlight Error Cells 179
7.2.10. Blocks 181
7.2.10.1. How to Create a Standard Block 183
7.2.10.2. How to Create a Block 183
7.2.10.3. How to Create a CallBlock 184
7.2.11. Page 185
7.2.12. Email 186
7.2.12.1. Fixed Sender Domain and Email Delivery Report Functionality 189
7.3. Using Survey Layouts 189
7.4. Secondary Project 189
7.5. Editing the Routing 190
7.5.1. Moving an Object 190
7.5.2. Duplicating an Object 191
7.5.3. Selecting Multiple Objects 191
7.5.4. Deleting Objects 191
7.5.5. Pitfalls 191
7.6. Scratchpad 191
7.7. Folders 191
7.8. Grid View 192
7.8.1. The Grid View Configuration Page 192
7.8.2. The Grid View Page 193
7.8.2.1. The Grid View of a Single Node 193
7.8.2.2. The Grid View of Project and Routing Folders 199
7.8.2.3. Using the Text Filter Setting 199
7.9. Search/Replace 200
7.9.1. The Grid View Configuration Page for Search/Replace 200
7.9.2. Search/Replace Grid View Page 202
7.10. Spell Checker 203
7.10.1. Supported Languages 204
7.10.2. Using Spell Checker 204
7.11. Questionnaire Reviewer 211
7.11.1. How to Set up the Questionnaire Reviewer 211
7.11.2. How to Set up and Send the Review Email 212
7.11.3. The Questionnaire Reviewer Window 213
8. Quotas 215
8.1. Two Alternative Views 215
8.1.1. How to Change Views 215
8.1.2. The Grid View 216
8.1.2.1. Examples of Quotas using the Grid View 216
8.1.2.2. The Grid View Settings Tab 218
8.1.3. The List View 219
8.1.3.1. Grid Questions in List View 220
8.1.3.2. Multi Questions in List View 220
8.1.3.3. The List View Settings Tab 221
8.2. How to Define Quotas and Quota Forms 222

8.2.1. Defining the Quota Values in Grid View ... 223
8.2.1.1. Removing the Totals from Grid View ... 225
8.2.1.2. Hiding Unwanted Answer Alternatives ... 226
8.2.2. Defining the Quota Values in List View ... 227
8.2.3. Global Quotas ... 228
8.3. Changing Quotas and Quota Limits ... 229
8.4. Uploading Quota Limits ... 230
8.5. Updating Counters ... 232
8.6. Recalculating All ... 232
8.7. Email Alert on Full Quota ... 232
8.8. Terminating the Interview for Respondents when Quota is Full ... 232
8.9. Deleting Quotas ... 233

9. Database Designer ... 234
9.1. What is Database Designer? ... 234
9.2. Creating a Schema ... 235
9.2.1. Inserting a New Table ... 235
9.2.2. Table Properties ... 236
9.2.3. Captions ... 236
9.2.4. Generating the Table ... 237
9.2.5. Editing Table Contents ... 237
9.3. Synchronizing Between Design and Runtime Modes ... 238
9.4. Hierarchies ... 239
9.4.1. Balanced Hierarchy ... 240
9.4.2. Unbalanced Hierarchy ... 244
9.4.3. The Hierarchy Wizard ... 247
9.5. Uploading and Exporting Table Contents ... 248
9.6. Access Rights ... 251
9.7. Using Table or Hierarchy Lookups in the Questionnaire ... 251

10. Translator ... 255
10.1. Entering Confirmit Translator ... 255
10.2. Assigning Translators to Projects ... 255
10.2.1. Assigning Translators from Another Company ... 256
10.2.2. Assigning Groups of Translators ... 258
10.3. Emailing Projects to Translators ... 259
10.4. Translators' Interface ... 262
10.4.1. Using Translator ... 264

11. Translation XML ... 267

12. Confirmit Scripts ... 270
12.1. Accessing Survey Variables – the f Function ... 270
12.1.1. f('qID') ... 270
12.1.1.1. Single ... 271
12.1.1.2. Open Text ... 271
12.1.1.3. Multi ... 271
12.1.1.4. Multi with OpenText or Ordered Property Checked ... 272
12.1.1.5. Grid ... 273
12.1.1.6. Other, Specify ... 273
12.1.2. f('qID')['precode'] ... 274
12.1.2.1. Multi ... 274
12.1.2.2. Multi with Ordered Property Checked ... 274
12.1.2.3. Multi with OpenText Property Checked ... 274
12.1.2.4. Grids ... 274
12.1.3. Loops - f('qID','iteration_precode','iteration_precode',…..) ... 275
12.2. Conditions ... 276
12.2.1. .inc() ... 277
12.2.2. .size() ... 277
12.2.3. .toNumber() ... 277
12.3. Precode and Scale Masks /Filtering Answer Lists/Scales ... 277

12.3.1. a('qID') 278
12.3.2. set(), nset(), nnset() 278
12.3.3. .union() 278
12.3.4. .isect() 278
12.3.5. .diff() 279
12.3.6. Precodes 279
12.4. Column Masks in 3D-grids 279
12.5. Question Mask 281
12.6. Text Substitution/Response Piping 282
12.7. Dynamic Questions 283
12.7.1. Example Using Dynamic Questions 283
12.8. Validation Code 286
12.8.1. Default Validation Rules 286
12.8.1.1. Required answer testing 287
12.8.1.2. Exclusivity testing 287
12.8.1.3. Other-Specify validation 287
12.8.1.4. Rank order testing 287
12.8.2. Adding Your Own Validation Code 287
12.9. Script Nodes 287
12.9.1. Unicode Translator in Script Nodes 287
12.10. The Code Completion Functionality 288
12.10.1. Code Completion Requirements 289
12.10.2. Download and Install Code Completion 289
12.10.3. Using Code Completion 290

13. Quality Control 291
13.1. Random Data Generator 291
13.1.1. Ordering the Generation of Random Data 291
13.1.2. Runtime Script Errors 292
13.1.3. User-defined Validation 294
13.1.4. Proportions 294
13.1.5. Excluding Code or Questions from the RDG run 295
13.2. Generate Dummy Data 296
13.3. Check Script Code 296
13.4. Topline Report 297
13.4.1. Loops in Topline Reports 299
13.5. Quick Test in Professional Designer 299
13.6. External Quick Test 300

14. Preparing for Data Collection 302
14.1. Generating Response Databases - Launching 302
14.1.1. Points to Note when Updating an Existing Database 304
14.1.2. Enabling External Test Access 305
14.1.3. The Error Frame for Script Errors and Debugging 306
14.2. The Survey Versioning Functionality 307
14.2.1. The Version Comparison Tool 307
14.2.1.1. XML Comparison 308
14.2.2. Overwriting Running Interviews 309
14.3. Generating Interview Files 309
14.3.1. Web Interview Files 309
14.3.2. Survey Settings 310
14.3.2.1. The Survey Channels Tab 310
14.3.2.2. The Web Options Tab 310
14.3.2.3. The CAPI/Kiosk Options Tab 314
14.3.2.4. The Layout Tab 314
14.3.2.5. The Validation & XSS Tab 318
14.3.3. Pop-up Surveys 319
14.3.3.1. An Example of a Script for Pop-up Surveys 320

15. Handling Respondents in Limited Surveys 322
15.1. Preparing the Respondent List 322

15.1.1. Use of Background Variables 322
15.2. Uploading the Respondent List 323
15.2.1. Respondent Uploading with Access to Data Transfer Encryption and FTP 324
15.3. Respondent Data Editor 326
15.3.1. Enter/Remove Search Fields 326
15.3.2. Select Columns and Define a View 327
15.3.3. To Search 331
15.3.3.1. Respondent Export 331
15.3.3.2. Respondent Export with Access to Data Transfer Encryption and FTP 332
15.3.4. Update Data and Delete Respondents 333
15.3.5. Synchronization 335
15.4. Sending Email 336
15.4.1. Step 1: Respondent Selection 336
15.4.1.1. The Selection Criteria Page Properties and Fields 337
15.4.1.2. Fixed Sender Domain and Email Delivery Report Functionality 339
15.4.1.3. Mail Merging Functionality 339
15.4.1.4. Avoiding Unnecessary Respondent Inquiries 339
15.4.2. Step 2 - Creating the Email 340
15.4.2.1. The Create Email Page Properties and Fields 341
15.4.3. Step 3 - Previewing the Email 342
15.4.4. Step 4 - Sending Emails 343
15.4.5. Setting up Recurring Batch Emailing Tasks 344
15.4.6. Email Delivery Report 346
15.4.6.1. Tracking E-mail Status 346
15.4.6.2. Recurring Batch Emailing Tasks 347
15.4.6.3. Using Your Own Domain on Confirmit's Server: Technical Setup 347
15.4.7. Spam 348
15.4.7.1. Minimizing Spam 348
15.4.7.2. Avoidance of "Spoofing" Status 349
15.5. Handling Respondents in Multilingual Projects 349
15.5.1. Open Multilingual Surveys 349
15.5.2. Limited Multilingual Surveys 349
15.6. Rule Based Send Outs 350

16. Basic Panels 356
16.1. Recruiting Panelists 356
16.2. How to Create a Panel 356
16.3. The Basic Panel List 357
16.4. Creating a New Panel Project 357
16.4.1. The PanelistParticipation Folder 358
16.4.2. The PanelistStatus Folder 359
16.5. Launch Panel 359
16.6. Panelist Web Page Templates 360
16.6.1. Primitives 361
16.6.2. Lost Password Requests 362
16.7. Panelist Editor 362
16.8. Sampling Functionality 363
16.8.1. How to Define a Sample 363
16.8.2. How to Lock a Sample 365
16.8.3. Expressions 365
16.9. Uploading Samples to Projects 368
16.10. Survey Overview in a Panel 369
16.11. Panelist Login Pages 370

17. Online Coding Tool 374
17.1. Why Have a Coding System? 374
17.2. Specification Summary 375
17.3. Entering Online Coding 376
17.3.1. User Settings 376
17.3.2. Object Permissions 377

17.4. One Multi for Each Open-Ended 378
17.5. Locking the Questions for Coding 379
17.6. Coding Window 381
17.6.1. Elements of the Coding Window 382
17.6.1.1. Heading 382
17.6.1.2. Searching and Sorting 382
17.6.1.3. Working Set and Coding 383
17.6.1.4. Navigation 384
17.6.1.5. Replace Function 384
17.7. Final Comments 385
17.7.1. Step-by-Step Guide for Online Coding: 385

18. Rapid Results 386
18.1. Preconditions 387
18.2. Accessing Rapid Results 387
18.3. The Rapid Results Menu Bar 387
18.3.1. Edit Banner 387
18.3.1.1. How to Create the Banner 387
18.3.1.2. The Filter Operators 390
18.3.2. The Question Filter 390
18.3.3. How to Save a Report 391
18.3.4. How to Delete a Report 391
18.3.5. How to Send to Excel 392
18.3.6. Print 393
18.3.7. How to Add to Reportal Report 394
18.4. Report Settings and Navigation 395
18.4.1. Report Settings 396
18.5. Updating the BitStream Files 397
18.6. Editing Result Charts 397

19. The Advanced Filter Designer 400
19.1. Worked Example 400
19.2. Inverting the Logic 404
19.3. Operators for Numeric Questions 405
19.4. Operators for Interview Start and Interview End 406

20. Aggregated Reporting 407
20.1. Introduction 407
20.2. Checking a Single Question 407
20.3. Recoding Variables for Reporting Purposes 408
20.4. Building Reports 409
20.5. How to Order a Report 410
20.6. How to Build a Crosstab 412
20.7. Reporting on Loops 414
20.8. Weighting 415
20.8.1. How to Create a New Weight Model 415
20.8.1.1. The Weight Model > Overview Tab Properties 419
20.8.1.2. The Weight Model > Settings Tab Properties 420
20.8.2. Weighting Different Sub-samples Separately 420
20.9. Time Series 423
20.10. Filters 424
20.10.1. Defining Filters 424
20.10.1.1. Defining Filters in the Reporting Tree 424
20.10.1.2. Defining Filters in the Reporting Menu 425
20.10.1.3. Defining Filters for Multi Questions 427
20.10.1.4. Defining Filters For Grid Questions 428
20.10.2. Applying Filters 429
20.11. Settings 430
20.11.1. General Settings 430
20.11.2. Report Element Settings 432

20.11.2.1. The Report Node General Tab 432
20.11.2.2. The Chart Tab 433
20.11.2.3. The PowerPoint Tab 435
20.11.2.4. The Publisher Tab 435
20.11.2.5. The Filter Tab 436
20.11.2.6. The Masks Tab 437
20.11.2.7. The Crosstab Tab 437
20.11.2.8. The Loop Tab 438
20.12. Iterated Reporting 438
20.12.1. How to Create an Iterated Report - The General Procedure 439
20.12.2. Creating a Report 439
20.12.3. How to Create an Iterator and Define Iterations 439
20.12.4. Assigning an Iterator to a Report 443
20.12.5. Assign Iterator Filter/Mask to Report Nodes 444
20.12.6. Assign Iterator Filter/Mask to Pivot Views 445
20.12.7. Ordering MS Office Reports 446
20.12.8. Publishing an Iterated Report 448
20.12.9. Publishing Pivot Views 450
20.12.10. Connecting Users to Reports/Pivot Views 450
20.13. Publishing Reports 451
20.13.1. How to Schedule Publishing 452
20.13.2. Changing a Report after Publishing 454
20.14. BitStream Files 454
20.14.1. How to Generate BitStream Files 454
20.14.2. Updating the BitStream Files 456
20.14.3. BitStream Indexes 457
20.15. Pivot Views 458
20.15.1. How to Create a Pivot View in the Report Tree 459
20.15.2. How to Connect an Iterator to a Pivot View 461
20.15.3. How to Publish a Pivot View 462
20.15.4. The Pivot View Interface 462
20.15.5. Hot keys 463
20.15.6. The Application Interface (Left Frame) 463
20.15.6.1. Groups 465
20.15.6.2. Chart 465
20.15.6.3. Table 465
20.15.6.4. Options 465
20.15.6.5. Containers 465
20.15.7. Containers and Items 467
20.15.7.1. Use of items in the Data container 467
20.15.7.2. Use of items in the Column, Row and Filter containers 468
20.15.8. Masks 468
20.15.8.1. The Difference Between Masks and Filters 468

21. Recoding Data 469
21.1. Expression Syntax and Evaluation 469
21.1.1. SQL 469
21.1.2. JScript 470

22. Individual Reporting 472
22.1. Building an Individual Report 473
22.2. Search Definitions 474
22.2.1. The Search Definition Object's Properties 475
22.2.2. The General Tab 476
22.2.3. The Titles Tab 476
22.2.4. The Criteria Tab 476
22.2.5. The Languages Tab 478
22.2.6. Search Criteria within the Search Definition 478
22.3. Hitlists 478
22.3.1. The Hitlist Properties General Tab 480
22.3.2. The Titles Tab 480

22.3.3. The Languages Tab 480
22.3.4. Hitlist Columns 481
22.3.4.1. The Hitlist Column Properties General tab 481
22.3.4.2. The Headers Tab 481
22.3.4.3. The Languages Tab 481
22.4. Single Views 482
22.4.1. How to Create a Single View 482
22.4.2. The Single View Editor 484
22.4.3. Including Respondent Data in a Single View 486
22.4.4. The Questionnaire Map 486
22.4.5. Preview 488
22.5. Individual Reports 488
22.5.1. The Individual Report Wizard 488
22.5.1.1. Step 1 – Select Reporting Objects 489
22.5.1.2. Step 2 – Set a Title for Each Language 490
22.5.1.3. Step 3: Select the Layout and Set the Properties 490
22.5.1.4. Step 4: Set Properties for Each Frame 491
22.5.2. Modifying an Individual Report 492
22.6. Recovering Deleted Items 493
22.7. Publishing the Individual Report 494
22.8. The Individual Reporting User Interface 494
22.8.1. Open Text Search 496
22.8.2. Multiple Choice Search 496
22.8.3. Single Choice Search 497
22.8.4. Search on items in a multi question 497
22.8.5. Predefined Search 497
22.8.6. Sorting the Hitlist 497
22.9. Making Modifications to an Individual Report after it has been Published 498

23. Administration of End Users 499
23.1. The General Procedure 500
23.2. The End Users Menu 500
23.3. How to Access an End User List 500
23.4. How to Create a New End User List 501
23.5. The General Tab 502
23.5.1. How to Access a Published Online Report 503
23.5.2. How an End User can Change Their Settings - The User Settings Link 504
23.5.3. How an End User can Change Their Password - The Change Password Link 504
23.6. The Permissions Tab 505
23.6.1. How to Add a User to the Permissions List 505
23.6.2. Searching for End Users 506
23.7. The Companies Tab 506
23.7.1. How to Add a New Company to a List 507
23.8. The Users Tab 507
23.8.1. How to Add a New User to a List 508
23.8.2. How to Edit the User Information 509
23.8.3. How to Change an End User's Password 509
23.8.4. The Users > Details Page > Groups Tab 510
23.8.4.1. How to Attach a Group to a User 510
23.8.4.2. How to Remove a Group from a User 510
23.8.5. The Users > Details Page > Published Online Reports Tab 510
23.8.5.1. How to Attach a Published Online Report to a User 511
23.8.5.2. How to Attach a Published Online Report Iteration to a User 511
23.8.5.3. How to Remove a Published Online Report from a User 512
23.8.6. How to Upload a List of Users 512
23.8.6.1. Rules for Uploading 514
23.8.7. How to Send Emails to End Users 514
23.8.7.1. Scheduling an Email for Later Execution 516
23.9. The Groups Tab 516
23.9.1. How to Add a New Group to the List 517

23.9.2. The Groups Details Page 517
23.9.2.1. How to Add a User to a Group 517
23.9.2.2. How to Remove a User from a Group 518
23.9.2.3. How to Link a Group to a Group 519
23.9.2.4. How to Assign Published Online Reports to a Group 519
23.9.2.5. How to Assign Report Iterations to a Group 520
23.10. The Assigned Online Reports Tab 520
24. The Login Interface for End Users 521
25. Survey Data 522
25.1. Clear Data 522
25.2. Edit Survey Data 522
25.2.1. Searching for Respondents 523
25.2.1.1. Standard Search 524
25.2.1.2. Advanced Search 524
25.2.2. How to Add and Remove Columns 524
25.2.3. Views 525
25.2.4. How to Delete Respondent Data 527
25.2.5. How to Update Answers for All Respondents in a Search Result 527
25.2.6. How to Update One Respondent's Answers 529
25.3. Data Transfer 532
25.3.1. Template Editor 533
25.3.1.1. Import of Export Templates 535
25.3.1.2. Data Export Templates for Projects with Loops 536
25.3.2. Exporting Data from a Legacy Database 546
25.3.2.1. Data Export 546
25.3.2.2. Report Export 556
25.3.2.3. Triple-S Export 557
25.3.2.4. Ascribe Export 559
25.3.2.5. Exporting to MS Word® 561
25.3.3. Exporting Data from an Optimized Database 563
25.3.3.1. Exporting from an Optimized Database - Step 1 563
25.3.3.2. Step 2 when the Export Format is Excel 564
25.3.3.3. Step 2 when the Export Format is Delimited Text File 564
25.3.3.4. Step 2 when the Export Format is Triple-S 565
25.3.3.5. Exporting from an Optimized Database - Step 3 566
25.3.4. Importing Data into a Legacy Database 567
25.3.4.1. Upload Files to a Legacy Database 568
25.3.4.2. Pick up files from server 570
25.3.4.3. File Names 571
25.3.4.4. The Import Files 572
25.3.4.5. Validation 572
25.3.5. Importing Data into an Optimized Database 573
25.3.5.1. Importing to an Optimized Database - Step 1 573
25.3.5.2. Step 2 when the Import Format is Excel 574
25.3.5.3. Step 2 when the Import Format is Delimited Text File 575
25.3.5.4. Step 2 when the Import Format is Triple-S 576
25.3.5.5. Importing to an Optimized Database - Step 3 576
26. The Data Processing Module 578
26.1. Introduction 578
26.1.1. What is Triple-S? 579
26.1.2. The Triple-S Versions 579
26.2. The Data Processing Menu 579
26.2.1. Triple-S Template List 580
26.2.1.1. How to Create a New Triple-S Template 580
26.2.1.2. How to Import a Triple-S Template 583
26.2.1.3. How to Export a Triple-S Template 584
26.2.1.4. How to Replace a Triple-S Template 584
26.2.2. Current Rule 585
26.2.2.1. The General Tab 585

26.2.2.2. The Source Tab 588
26.2.2.3. The Action Tab 591
26.2.2.4. The Target Tab 591
26.2.2.5. The Permissions Tab 594
26.2.3. Current Rule Set 595
26.2.3.1. The General Tab 596
26.2.3.2. The Rule Management Tab 597
26.2.3.3. The Report Tab 599
26.2.3.4. The Permissions Tab 600
26.2.4. Rule List 601
26.2.4.1. How to Create a New Rule 601
26.2.4.2. How to Import a Rule 602
26.2.5. Rule Set List 603
26.2.5.1. How to Create a New Rule Set 603
26.3. Technical Details 603
26.3.1. Survey Source 603
26.3.2. Survey Target 604
26.3.3. Validation Rules 604
26.4. The Bitstring Format 606
26.5. The Spread Format 606
26.6. Confirmit Tags 607
27. APPENDIX A: LIMITS 608
28. APPENDIX B: Confirmit LANGUAGE CODES 609
29. APPENDIX C: RESERVED KEYWORDS 615
Index 617

What's New in this Issue?

The Confirmit 12.5 User Guide has been updated to reflect changes to the Confirmit application. Changes in this edition are described in the following sections:

- The text is changed and a note is added to the Precodes section (go to Precodes on page 155 for more information).
- The text is edited in the Precodes description in the Fields and Columns in the Loop Details Page section (go to The Fields and Columns in the Loop Details Page on page 176 for more information).
- The Quotas chapter is extensively re-written and re-organized to clarify the information (go to Quotas on page 215 for more information).
- A possible cause of a compilation fault is added to the list in the Generating Response Databases section (go to Generating Response Databases - Launching on page 302 for more information).
- The Override domain in survey URLs option is added to the Survey Settings > Web Options tab (go to The Web Options Tab on page 310 for more information).
- The Additional Survey Link and Custom Survey Link Text parameters are added to the Email wizard (go to Step 2 - Creating the Email on page 340 for more information).
- The Data Transfer section in the Survey Data chapter is reorganized, and the two "....Optimized Database" sections are added (go to Data Transfer on page 532 for more information).
- The Source Type > File section in the Data Processing chapter is updated to reflect changes in the application (go to Source Type > File on page 588 for more information).
- The Current Rule section has been extensively updated to reflect changes in the application (go to Current Rule on page 585 for more information).
- The Precodes text and associated note are changed in Appendix A - Limits (go to APPENDIX A: LIMITS on page 608 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 that are changed since the previous issue are listed here - minor changes to the text, illustrations and layout are not listed.

1. What is Confirmit?

Confirmit is a comprehensive Web-based information retrieval and presentation software application. Confirmit's vision is to revolutionize the survey & reporting process through automation and integration. The Confirmit software is Confirmit's answer to that vision.

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 "ASP 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 ASP installation with Rackspace in USA. If you are a Confirmit On-Premise customer, or use another Confirmit Company ASP 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 two types of Confirmit user: Advanced users and Express users. Your Confirmit administrator is entitled to define this user level.

On-Demand only:
Contact Confirmit Professional Services support@confirmit.com to change user level.

1.2.1. Advanced Users

Advanced users must acquire the most complete knowledge of the Confirmit web application. They are typically responsible for the following areas of a survey:

- Initiating a new project
- Programming questions and skip logic in Professional 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

1.2.2. 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 can 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.

Note: Confirmit Express replaces the old Confirmit Standard User. Any projects created by Standard users will remain in the system and will be accessible by Professional users. Express users will not be able to edit those projects as the old Standard projects are not compatible with Confirmit Express.

1.3. About Log-in Sessions

Whenever a Confirmit user logs on to the application, a new session object is created on the server side. This object holds information about the user's *state* (current project etc). The web server allocates memory for this state information. By maintaining this information as the user moves from page to page, the individual requests are kept small and simple.

However, the web server does not want to keep track of this information when the Confirmit user exits the web application. A user may exit the application without explicitly sending a "log off" command to the web server. If the time between user requests exceeds 20 minutes, an automatic *time out* occurs. Confirmit assumes the user has logged off and frees the memory that holds information about the state. If a new request is sent after a time out, the user is redirected to the first page of the web application. State information such as **current project** is lost.

1.4. Security Issues

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

1.4.1. 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 Company 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 Company has developed an Image Storing Application (ISA) where our customers can buy storage space for the images that are used in surveys. The ISA 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. This functionality will gradually be replaced by File Library functionality inside Confirmit application **(go to File Library on page 123 for more information).**

1.4.2. 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.

1.4.3. 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.

Data transfer encryption enables you to transfer data to and from Confirmit in a secure way. 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

An administrator setting makes it possible to force every Confirmit user within a company to use encryption and FTP server during data transfer. The encrypted files can then be either ordered by email (go to Handling Respondents in Limited Surveys on page 322 for more information), or sent to the FTP server for downloading (go to Data Transfer on page 532 for more information). The users will have to decrypt the files using their private PGP encryption keys.

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 your 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 Importing Data into a Legacy Database on page 567 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 (go to Respondent Uploading with Access to Data Transfer Encryption and FTP on page 324 for more information).

1.4.4. 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.

1.4.5. Back up 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.

1.4.6. 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.

1.5. System Requirements

1.5.1. 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 12 is minimum Internet Explorer 6.0 (IE6) for Confirmit Authors, and Internet Explorer 7 is supported.

To allow your IE6/7 browser to work optimally towards the Confirmit software, we strongly advise you to do the following:

- Allow for new versions of pages to be checked automatically. Go to **Tools > Internet Options > General > Temporary Internet Files > Settings**. 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 IE6/7 performs the automatic check in the above point. Go to **Tools > Internet Options**, then in the Temporary Internet Files section click on **Settings**. Set the TIFF size to no more than 150Mb (if it is currently higher that 150 reduce the size, if already below no action is required).
- Add the Confirmit Authoring URL(s) to the IE6/7 Trusted Sites. Go to "Internet Properties / Security / Trusted Sites" then click the **Sites** button. 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). 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**.
- Set the **"Allow script-initiated windows without size or position constraints"** to **Enable**.
- Allow cookies from the Confirmit Authoring sites (if your browser does not accept cookies, you will not be able to log on). Go to **Tools > Internet Options > Privacy > Sites**. Add the following two URLs: **author.confirmit.com**, **author.euro.confirmit.com** (type the addresses then click **Allow**). Alternatively, set the general cookie setting to **"Medium-High"** (a lower setting is not recommended.)

When Confirmit 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. Go to **Tools > Internet Options > General**. Then 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, accessible in a web browser. For a full list of requirements for using Confirmit authoring, see the tables below.

Confirmit Authoring prerequisites		
Element	Minimum	Recommended
Operating system	Microsoft Windows 95.Microsoft Windows NT4 required for Unicode support.	Microsoft Windows XP with latest service pack and hotfixes.
Web browser	Microsoft Internet Explorer 6.0	Microsoft Internet Explorer 6.0 with latest service pack and hotfixes.
Web browsing enhancement	Microsoft XML parser 3.0 SP3	Microsoft XML parser 4.0 (http://support.confirmit.com/xml/)
Office components	Microsoft Office 2003 formats-capable Office suite for opening exports	Microsoft Excel 2003 required to view exports from rapid Results

Note: Confirmit 12 supports only MS SQL Server 2005.
The Community Panel functionality requires MS SQL Server 2005.

Browser capability requirements

Element	Description
Cookies	Client cookies and session cookies must be allowed from the Confirmit server address. Browser not accepting cookies 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 requires this setting.
Download Signed ActiveX controls	Enable/ Prompt	Determines whether or not the browser can download and install the ActiveX answer list component. Grid view and Search-Replace will not work when this is set to disabled.
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	You will not be able to paste into the WYSIWYG fields of Confirmit if this is set to Disable

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.

1.5.1.1. 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

1.5.2. 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: In surveys using "Survey Layouts","Advanced WI features" such as sliders, autosums etc. (go to The Advanced WI Features Tab on page 164 for more information) 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. In surveys using "WI Templates", these features are supported in IE6 and IE7 (Windows). Respondents using other browsers will see the standard Confirmit survey interface, with "normal" radio buttons.

Note: "Dynamic Questions" (go to Dynamic Questions on page 283 for more information) is supported in IE6 and IE7 (Windows), Firefox 1.5+, Opera 9+ and Safari 2+. This functionality is only available in surveys using "Survey Layouts" (go to Survey Layouts on page 40 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.

1.5.2.1. 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. 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.

1.5.2.2. Respondent Input in Netscape

Respondent text input is not supported for Japanese, Chinese and Korean languages in versions older than Netscape 4.72 (which only had limited support).

This problem exists on the respondent side, which means that respondents having Netscape versions older than 4.72 will not be able to type in their response if the survey is in the above-mentioned languages.

In addition, versions up to 4.08 did not detect language settings in surveys, but, assuming that respondents have the correct language version installed, this should not be a problem. Netscape version 4.5 and newer did not seem to have any issues with language detection.

This is not a flaw in Confirmit, but a limitation in Netscape. More information regarding this is available on the Netscape website:

http://wp.netscape.com/eng/intl/gimesupport.html

1.5.3. 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/
Reporting	Office Web Chart component	Microsoft	http://www.microsoft.com

2. Starting Confirmit – a General Overview

2.1. Logging into Confirmit

Users log in to Confirmit from the URLs below:

USA site: http://author.confirmit.com

UK site: http://author.euro.confirmit.com

On-Demand only:
You can log in to Confirmit by choosing "Login" on the Confirmit home page, http://www.confirmit.com/.

When you access this link, the login page will open and you will be asked to input your user name and a password. Enter your personal user name and password and click **Log in**. If the browser that tries to log on to Confirmit does not meet the browser requirements, an error message will be displayed. When a new user enters Confirmit for the first time, he/she will be prompted to change the password.



Figure 1 The Confirmit Login window

If a user 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, Confirmit will lock and a message will be displayed telling the user that he must contact his Confirmit administrator to be given access. The user will not be able to log in again until an administrator reopens his access.

On-Premise customers can themselves set the permitted number of attempts in the registry settings. The default number of attempts is 3.

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

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

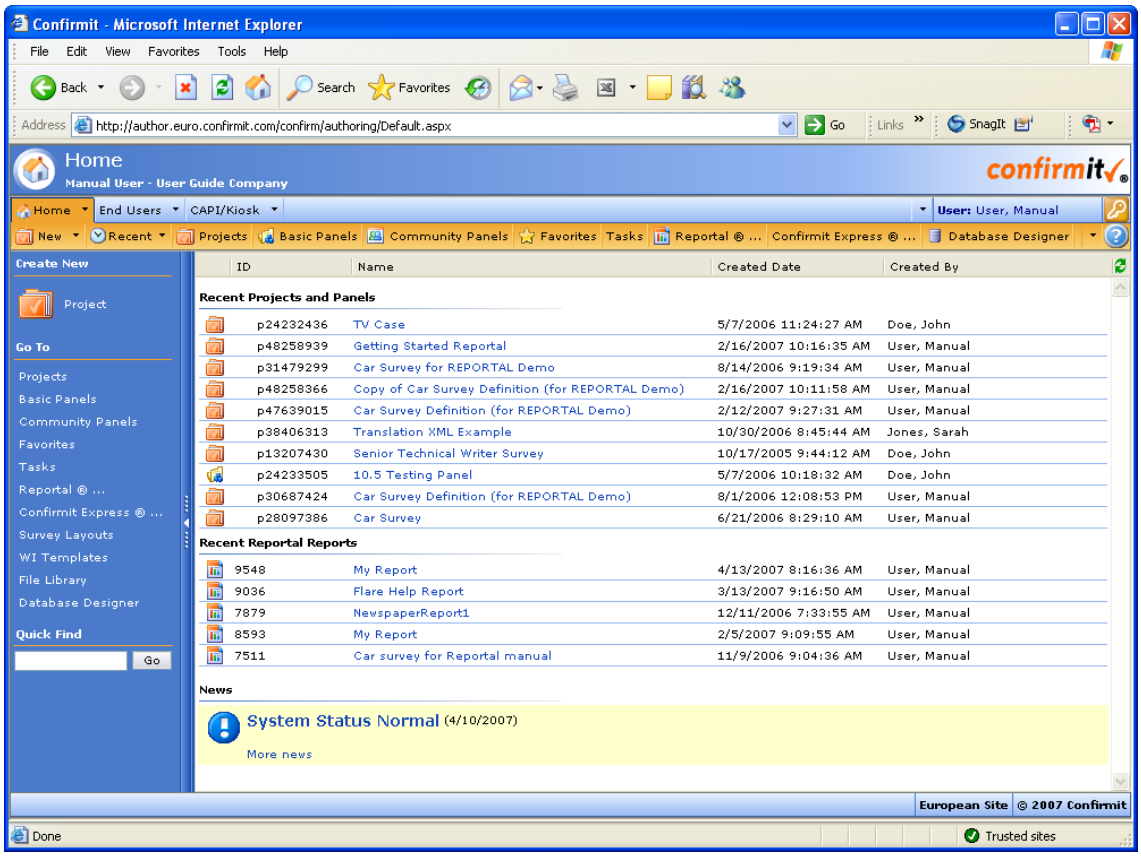


Figure 2 Example of a Home page for Advanced users

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. This manual will concentrate on the Advanced user interface.

2.2. Getting Help

Confirmit includes several sources of on-line assistance:

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

The following sections describe these in further detail.

2.2.1. Online Videos

Several areas of key functionality in Confirmit are explained using online videos that are integrated in the application. To start the videos, click the video icons that are located on various pages and windows in Confirmit. All these videos include an audio track.

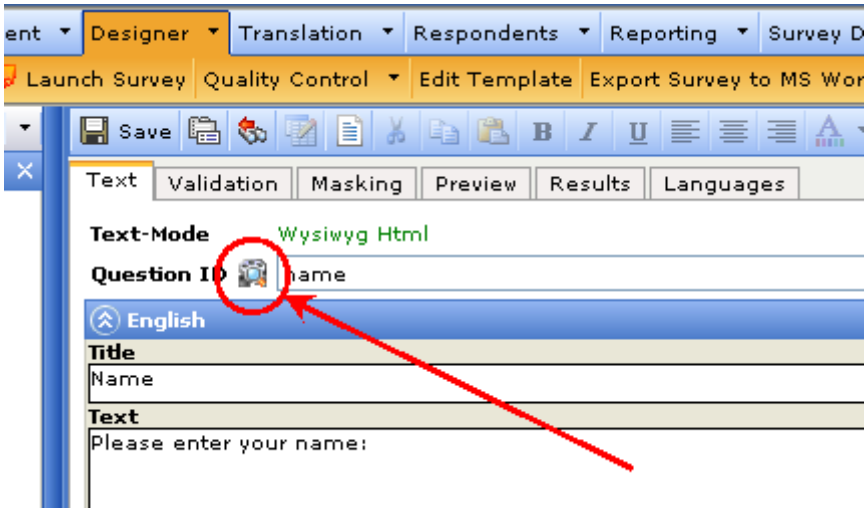


Figure 3 Example of a video icon

Note: These are Macromedia Flash videos. Good bandwidth (ADSL) is required to run the videos. The files will load slowly via an ISDN connection.

2.2.2. Context-Sensitive Help

Confirmit contains a built-in On-line Help system to provide you with assistance should you require it. Click the **?** button, located in the upper right corner of most of the windows, to open the context-sensitive on-line help page for that window. Most of the help 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 help pages.



Figure 4 The Help 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 property.

2.2.3. The Help Information Page

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

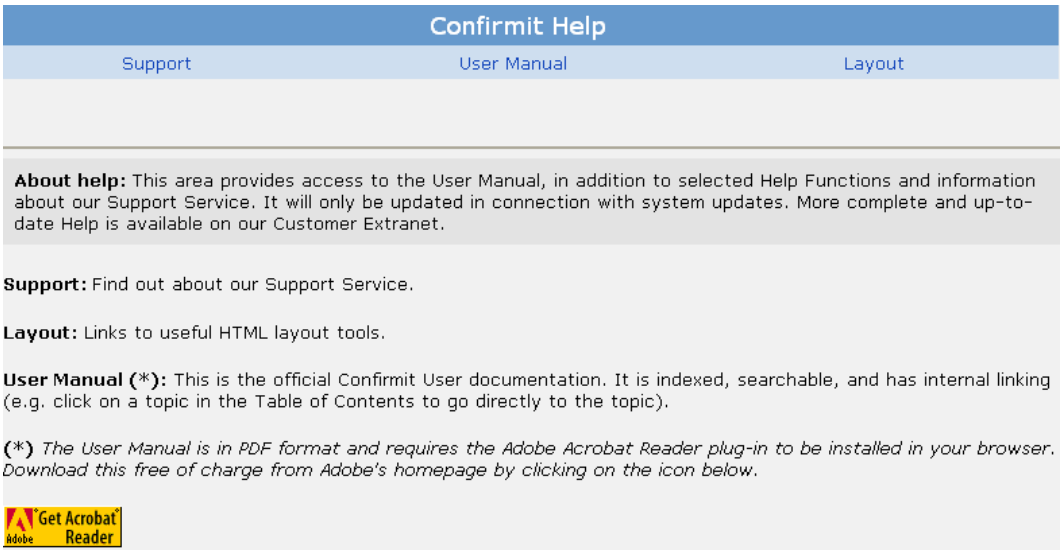


Figure 5 The Help Information window

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.

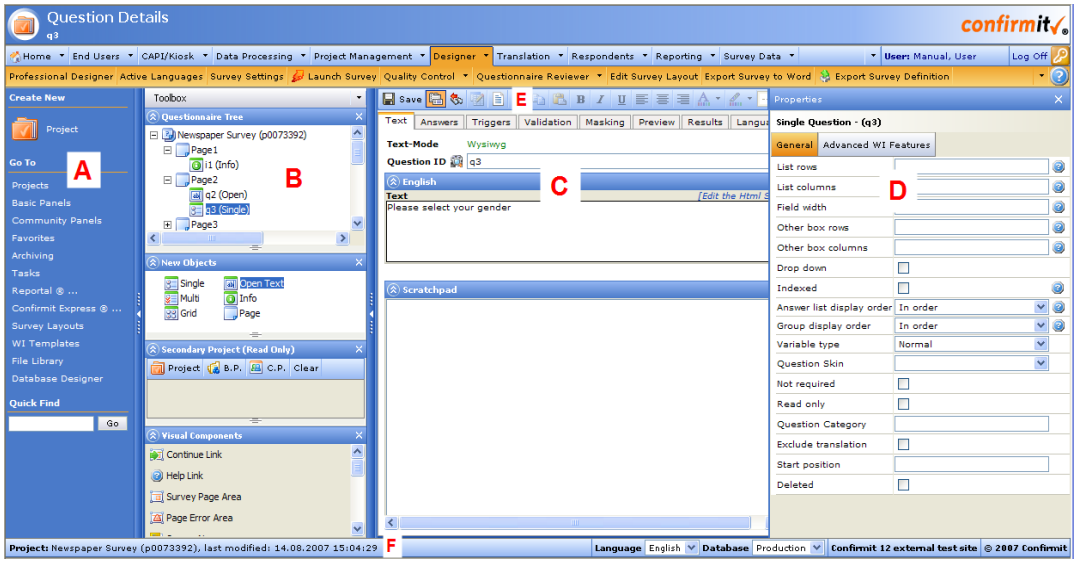


Figure 6 Panes and frames in Confirmit

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 7 The Pane Open/Close button

When you enter the Professional designer of a project, the **Questionnaire Toolbox pane(B)** opens displaying the Questionnaire Tree, New Objects, and Secondary Project 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)** (go to Property Sheets on page 19 for more information).

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

3.2. Menus

Confirmit contains two main menus:

- The Home menu
- The Project/Panel menu.

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: 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 8 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.

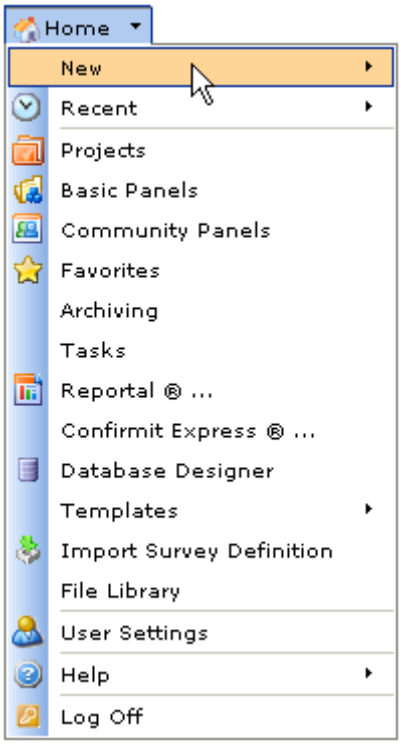


Figure 9 The Home drop-down menu

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: 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 10 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 Professional Designer page are displayed and available throughout the process of creating and editing a questionnaire. Via the toolboxes, you have access to the current questionnaire, the objects that can be used in questionnaires, and other projects from which you may wish to copy questions to the current questionnaire.

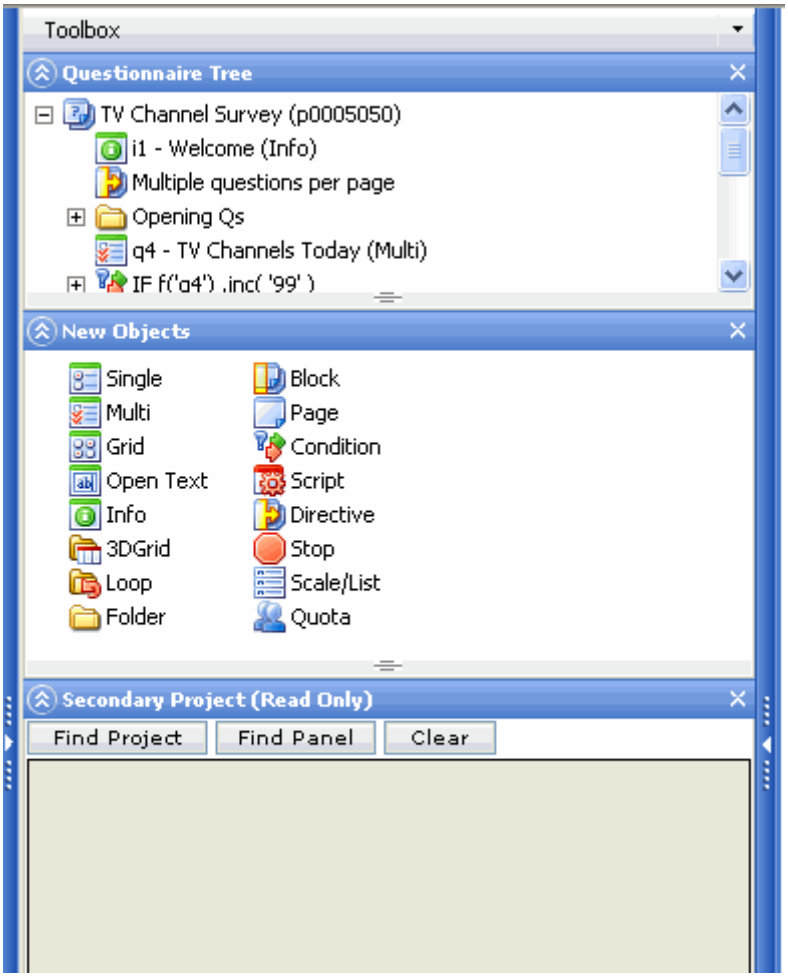


Figure 11 Toolboxes

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.

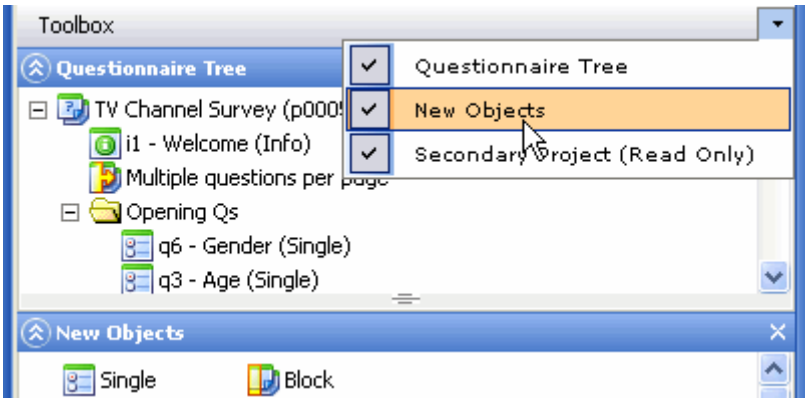


Figure 12 Removing toolboxes

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, the New Objects and Secondary Project items have been collapsed. Click on the Expand button (the downward-pointing chevrons) to reopen the panel.

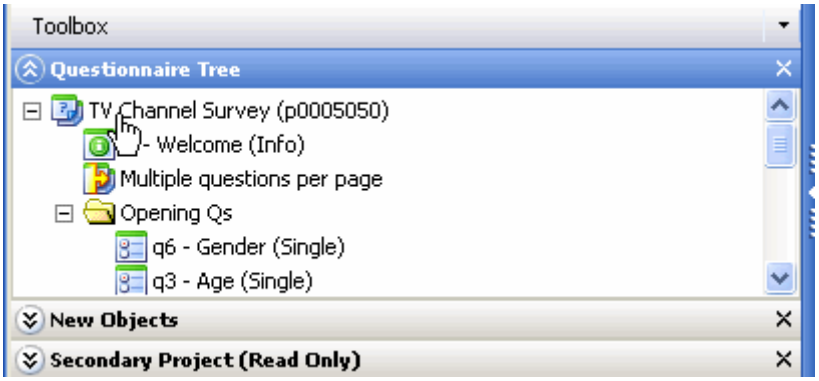


Figure 13 Collapse toolboxes

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.

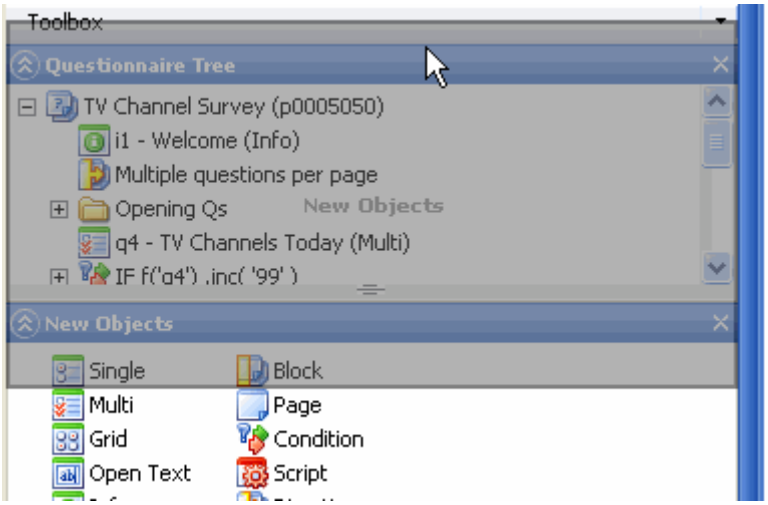


Figure 14 Rearranging Toolboxes

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.

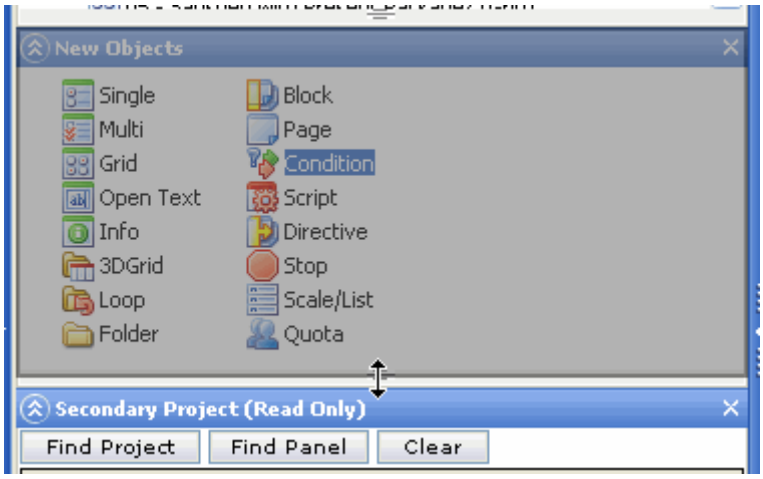


Figure 15 Resizing Toolboxes

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.

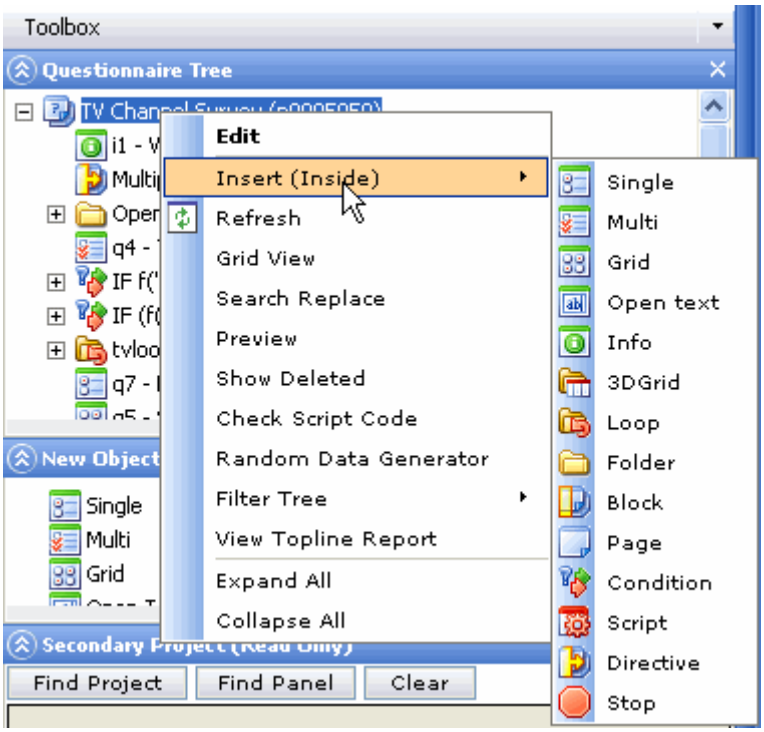


Figure 16 The Project menu

Depending on the object selected, the menu will display different items:

- **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.

- **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.
- **Show Deleted** - shows any nodes that have been soft-deleted.
- **Check Script Code** - checks scripts, validation codes, masking codes and conditional expressions in the questionnaire. A list of errors (if any) will be generated and displayed as clickable links in a separate pane. The erroneous scripts, etc. will be opened when you click the error link. The object will also be highlighted in the questionnaire tree (go to Check Script Code on page 296 for more information). Note that you DO NOT have to compile or generate to use this feature.

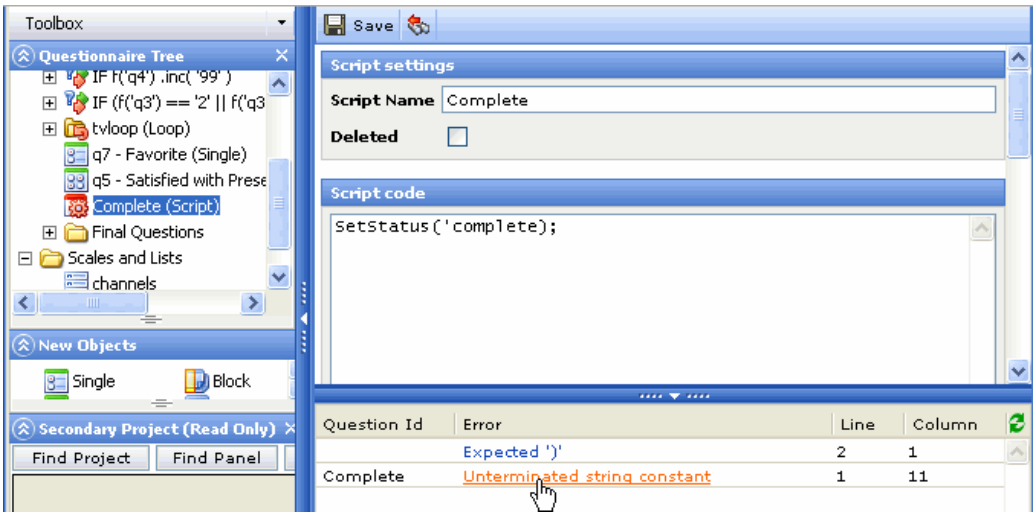


Figure 17 Checking script code

- **Random Data Generator** - opens the Random Data Generator page (go to Random Data Generator on page 291 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 (go to Rapid Results on page 386 for more information).
- **Expand All** - expands all folders and conditional expressions.
- **Collapse All** - collapses all folders and conditional expressions.
- **Spell Check** - opens the Spell Checker for the question.

Some of the objects in the Secondary Project (go to Secondary Project on page 189 for more information) can be right-clicked to display an action menu.

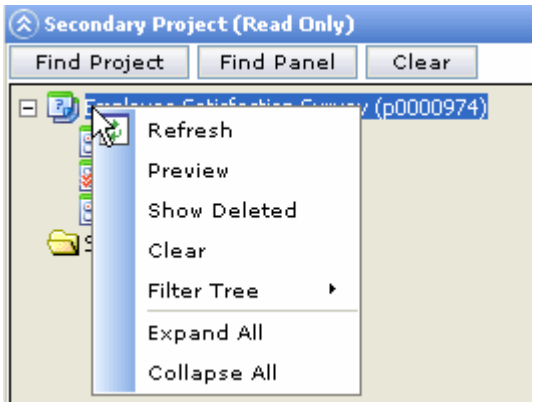


Figure 18 Menu in secondary projects

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. Click the **Toggle the properties for this question** button if the property sheet is not already displayed. The property sheet may have several tabs, but it will always display the type and name/title of the active object.

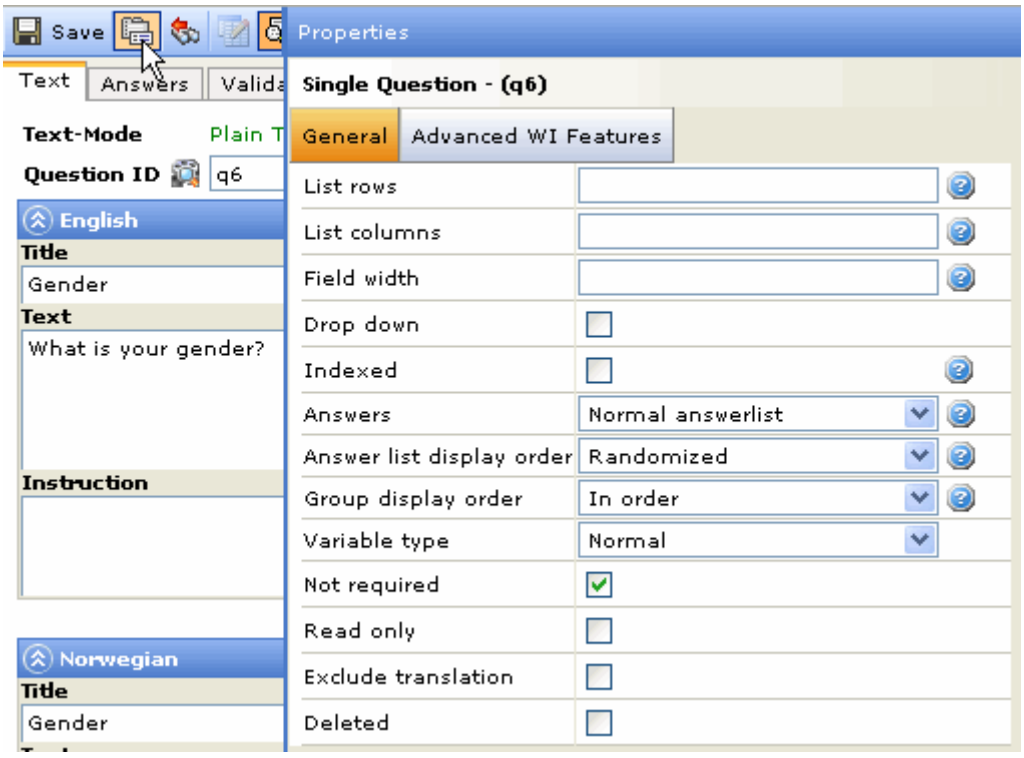


Figure 19 Example of a property sheet for a single question

The properties 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 dashed line indicates where the item will be dropped.

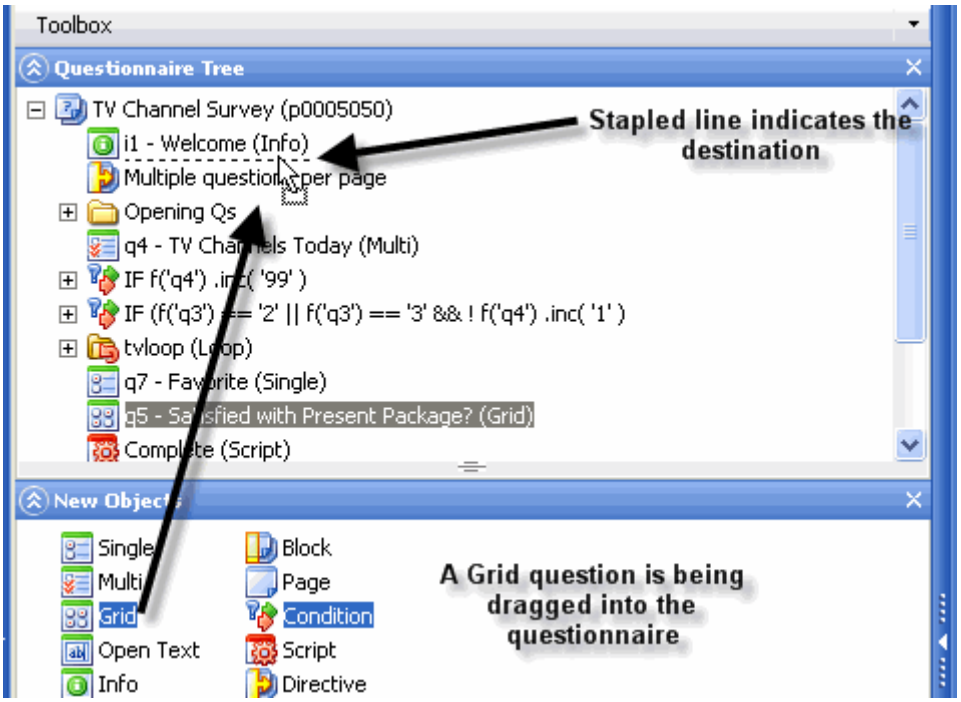


Figure 20 Drag-and-Drop operations

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. 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.

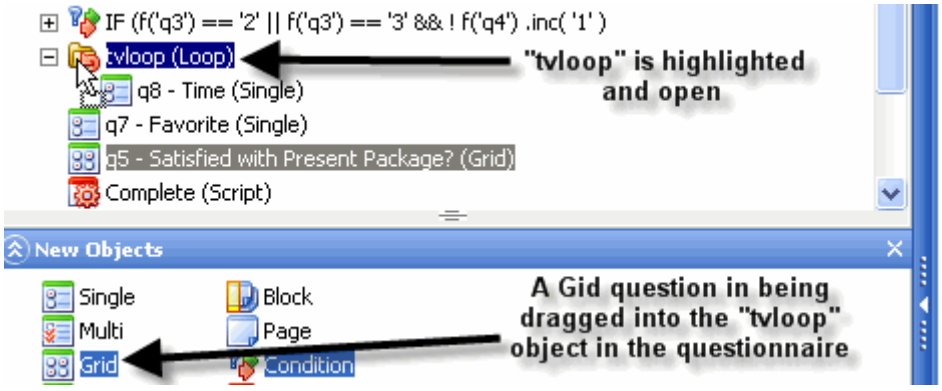


Figure 21 Drag-and-drop into folder

Note: When you are building reports in Online Reporting, the drag-and-drop method will function slightly differently. Here you must drop the object on the item after which you want to place it. In this case the destination item will be highlighted in red. Refer to the Reportal User Guide for further details.

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 Professional 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 Professional 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

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 “Specify your gender” is displayed in red and bold Verdana font.

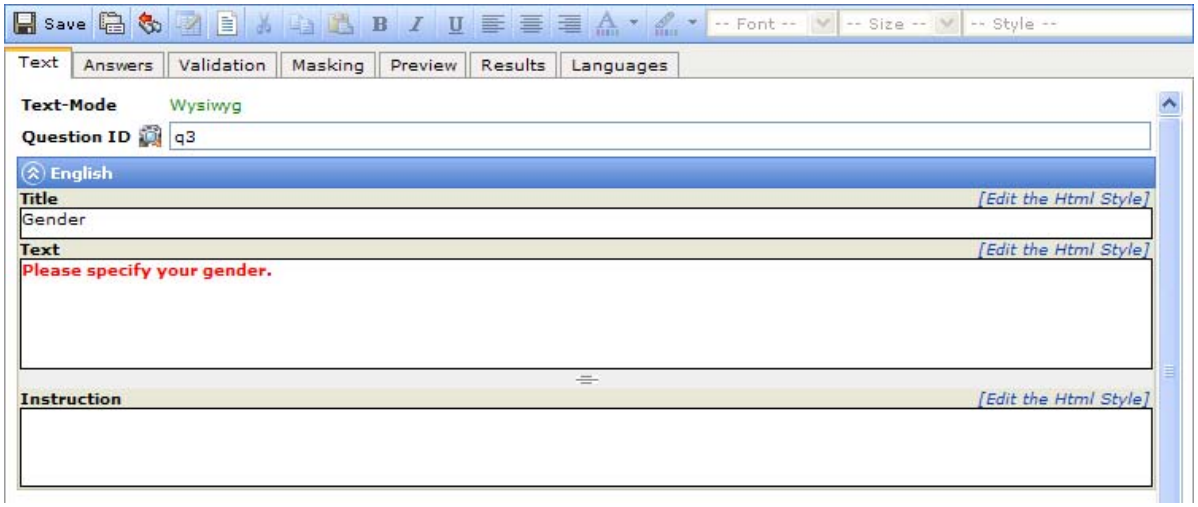


Figure 22 Working in the WYSIWYG editor

**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.

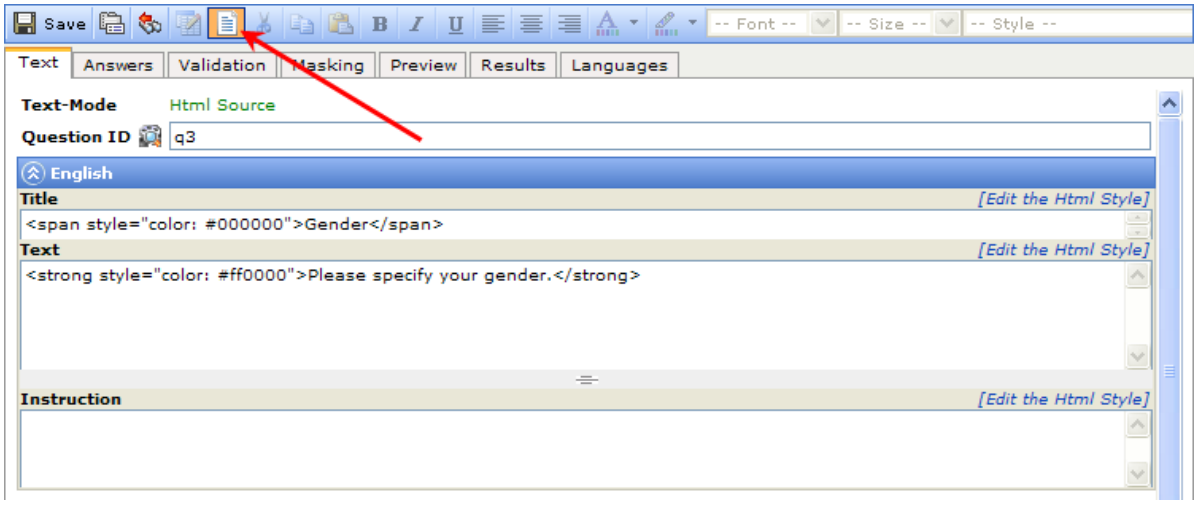


Figure 23 Using the HTML editor

3.7.2. Answer Lists and Scales/Lists

When editing Answer lists and Scales/Lists you can choose between two editing modes: the **ActiveX answer list** (you will need to download an ActiveX plug-in), and the **DHTML answer list**.

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 the other mode – DHTML mode.

ActiveX input mode supports long answer lists. However if the answer list contains several hundred items, you are recommended to use the Table lookup functionality that Database Designer offers (go to Database Designer on page 234 for more information).

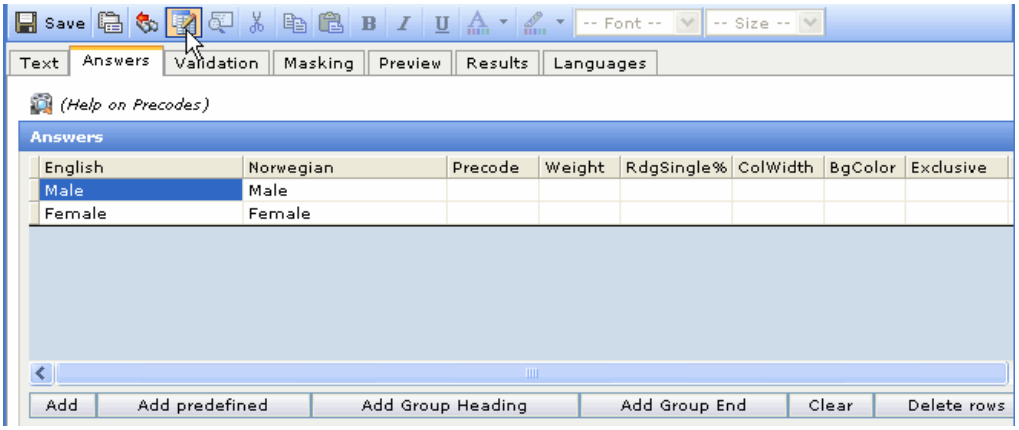


Figure 24 FlexiGrid answer list

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.

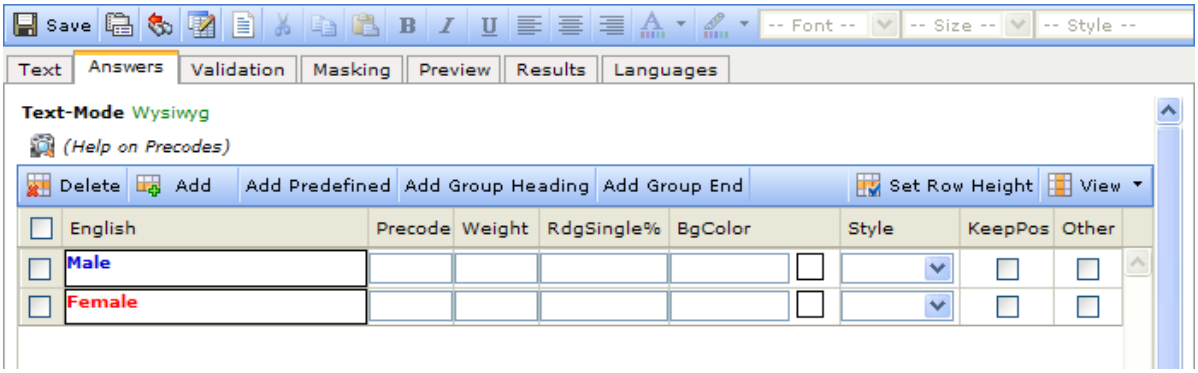


Figure 25 DHTML answer list

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

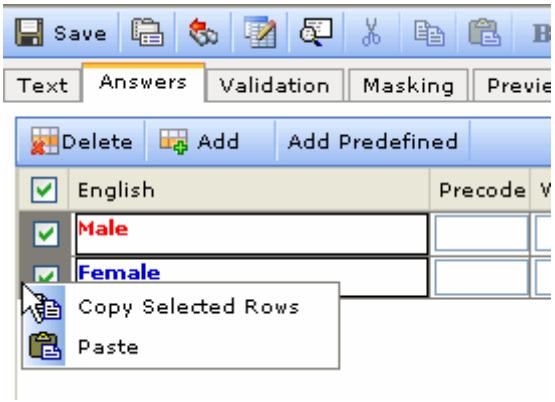


Figure 26 Copying rows in a DHTML answer list

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

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, 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.

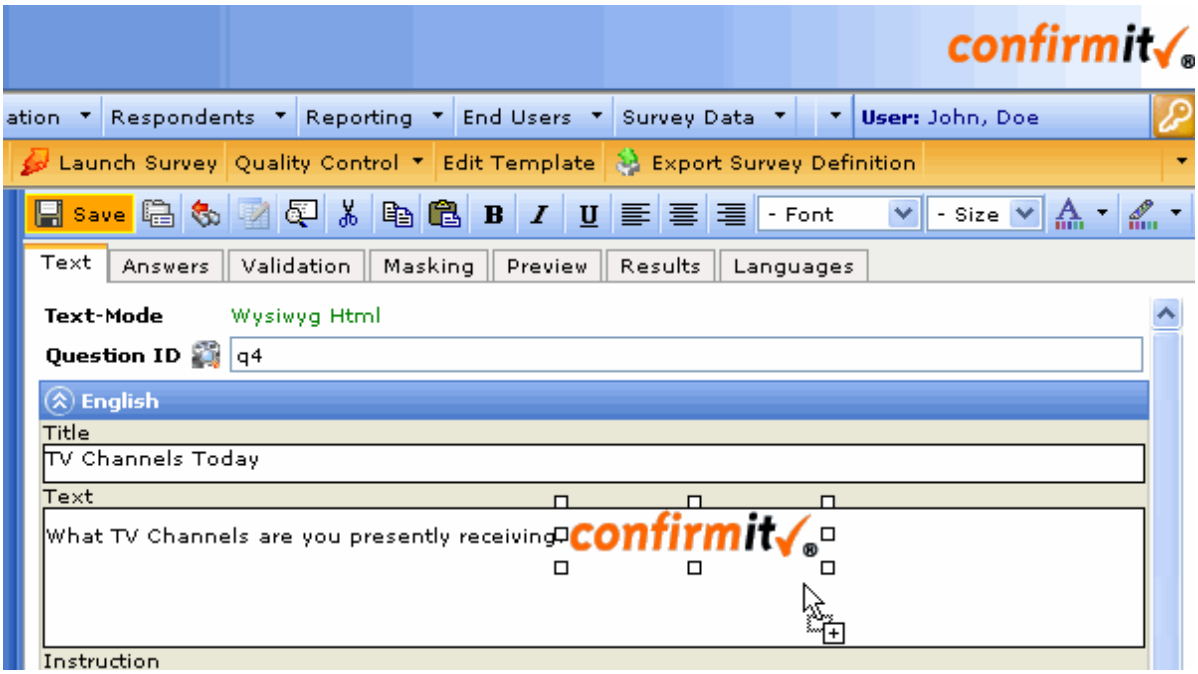


Figure 27 Dragging a logo into the text field

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.

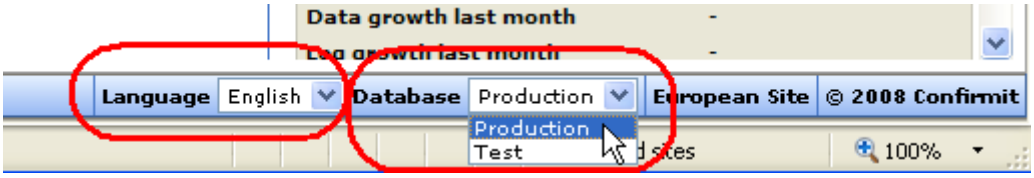


Figure 28 Language and database mode selection

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

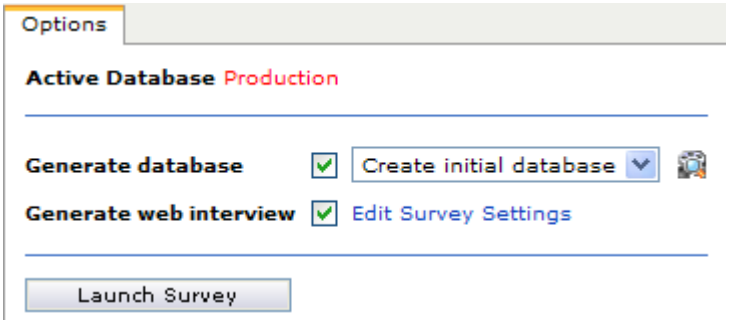


Figure 29 The active database shown in red text

3.10. The Optimized Database Format

Confirmit version C12.5 introduces a new database format - the **Optimized** format.

In the "old" style database, every possible answer to a multi question has a dedicated column in the response table. This means that for example a multi question which has 1000 answers will result in 1000 columns in the response tables, and these will be distributed across a number of database tables. The same sub-optimal situation also occurs for grid and 3D grid questions. As the number of answers in a question increases therefore, the result will be large and cumbersome databases, an increase in database generation times and poor database access performance. In addition, the database must be regenerated whenever a change is made to an answer list.

The **Optimized** format uses a "loop" system, in which the answers to a multi (or grid) question are stored in the table's rows rather than its columns. As only the answers selected by the respondent are stored in the table, this results in a much smaller and more manageable table, which allows database generation and access to be performed quickly and efficiently. A further advantage of the loop system is that as the loop is within the question and the loop refers to the answer list, 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 advantages of the optimized database format only really become apparent to the user once survey questions' answer lists become very long. This format will therefore benefit the "advanced" user more than the "standard" user.

The database format that is to be used for a project is selected during project creation on the Project Name dialog (go to Creating a New Questionnaire on page 145 for more information), and can be changed on the Project Overview page. Note that the format must be selected before the database is generated (the project is launched) for the first time. Once the database is generated then the format is fixed. Also, up until the point when the database is generated, 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 (go to BitStream Files on page 454 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:

- **Generate Dummy Data** - dummy data cannot be generated in the Optimized format database. Random data can however be generated (go to Random Data Generator on page 291 for more information).
- **Edit Templates** - Web Interface templates are not available. These are superceded by Survey Layouts (go to Survey Layouts on page 40 for more information).
- **Rule-based sendouts** - this functionality is superceded by that now available in the Data Processing module (go to The Data Processing Module on page 578 for more information).
- **Online Reporting** - this functionality is included in and superceded by Reportal. Refer to the Reportal User Guide for further information.
- **Individual Reporting** - this functionality is included in and superceded by Reportal. Refer to the Reportal User Guide for further information.
- **Filters** - this functionality is included in and superceded by Reportal. Refer to the Reportal User Guide for further information.
- **Calculate Variables** - some of this functionality is included in Reportal. Refer to the Reportal User Guide for further information.
- **Published Reports** - this functionality is included in and superceded by Reportal. Refer to the Reportal User Guide for further information.
- **Survey Data Exports** - this functionality is now available through the Data Processing module (go to The Data Processing Module on page 578 for more information).
- **Survey Data Imports** - this functionality is now available through the Data Processing module (go to The Data Processing Module on page 578 for more information)
- **Survey Data Template Editor** - this functionality is now available through the Data Processing module (go to The Data Processing Module on page 578 for more information).
- **Online Coding** - this functionality will be available in the Optimized format, though with some limitations (go to Online Coding Tool on page 374 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.

3.11. Search Lists

You can search for existing Projects, Panels, and Tasks. The Project and Panel search lists function in the same fashion and have similar search options. Note that the Task search list is slightly different (go to Tasks on page 32 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):

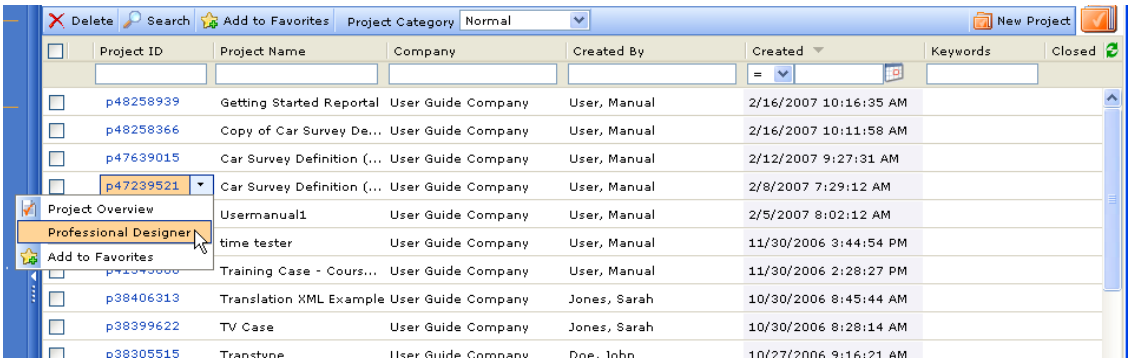


Figure 30 Example of a Search list

The fields across the top of the list allow you to search by Project ID, Project Name, owner Company, Creator of the project, by report creation date in “Created”, and by Keywords. When searching, a wildcard is automatically added after the text you enter. For example, in the search result below, all projects with the string “satisfaction” in them, have been returned.

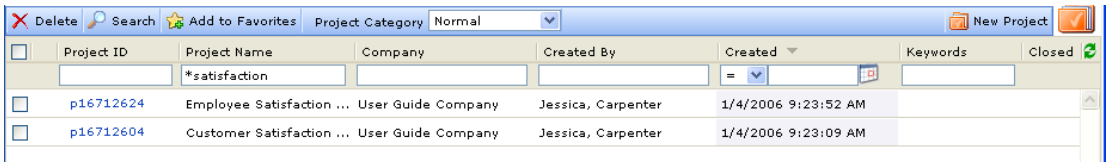


Figure 31 Example of the results of a specific search

- 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 project name to go to the Overview page for that project. If you click on the drop-down button to the right of the project name, the project menu will be displayed. "Project Overview" will bring you to the project Overview page. “Professional designer” will open the Professional Designer where you can edit the questionnaire. “Add to Favorites” will add the project 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 projects 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 projects for which the name starts with the selected letter.
- In the Project Category drop-down you can select the category of the displayed projects. The default value is Normal, which means that ordinary projects will be displayed. The other options are: All, Template, Benchmark, and Library.
  - The projects that are marked with category Library will usually be projects that you wish to keep for later reference.
  - The projects that belong to the category Template are specially marked Library items. They will be available when you create new projects and choose to base a new project on an existing project template in the step where you have to specify the project name. Projects that you want to store for later reuse can be stored in Library category. The projects that belong to the Benchmark category will usually be projects that you set up for reporting purposes in Reportal. See the Reportal User Manual for more details.

4. Home

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

4.1. Home Page

The first 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.

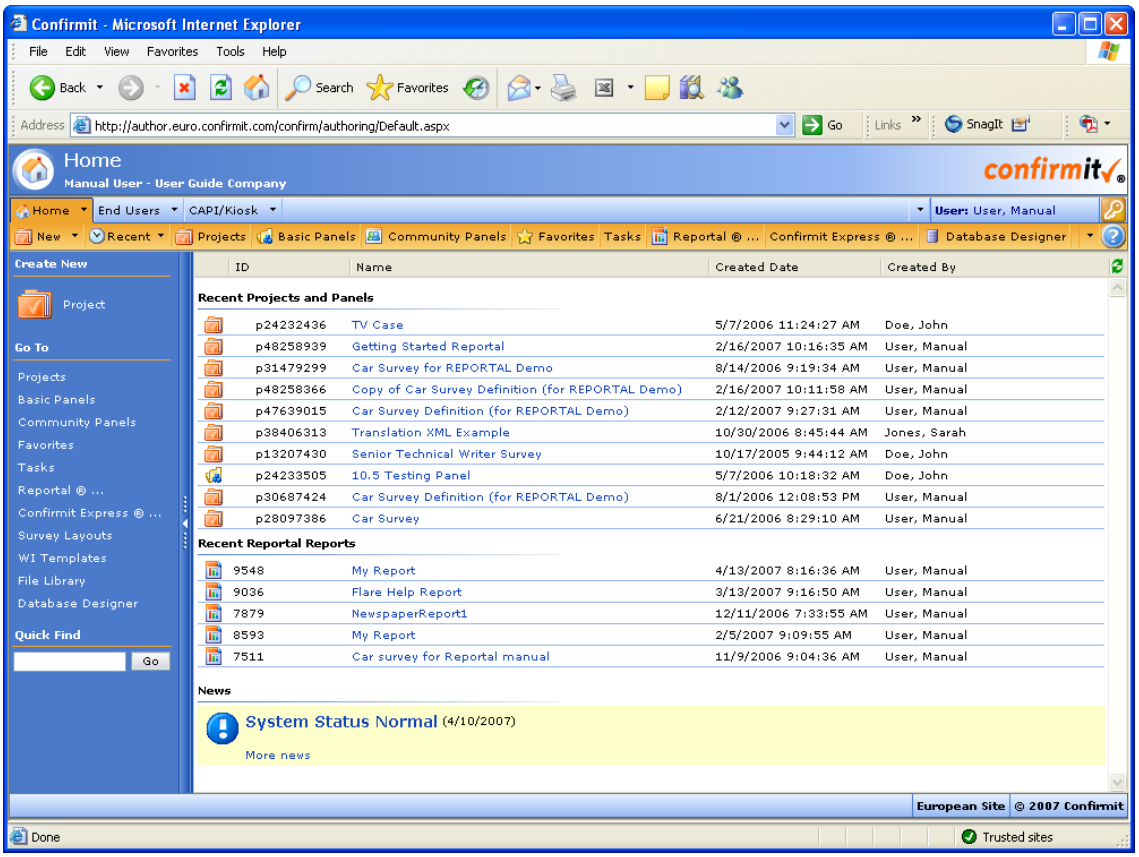


Figure 32 Example of the Confirmit Welcome page

- 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 and Survey Layouts.

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

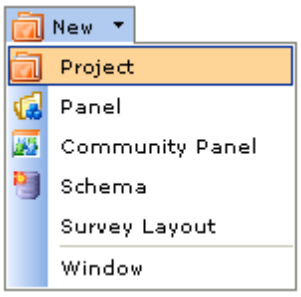


Figure 33 The New menu

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.

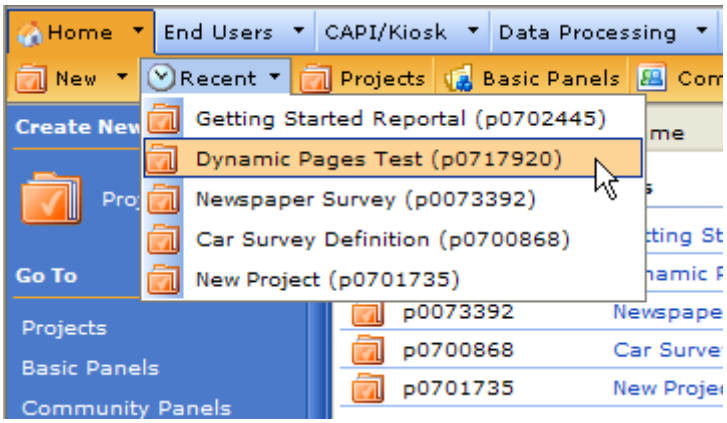


Figure 34 Example of the Recent menu

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 (go to Search Lists on page 25 for more information).

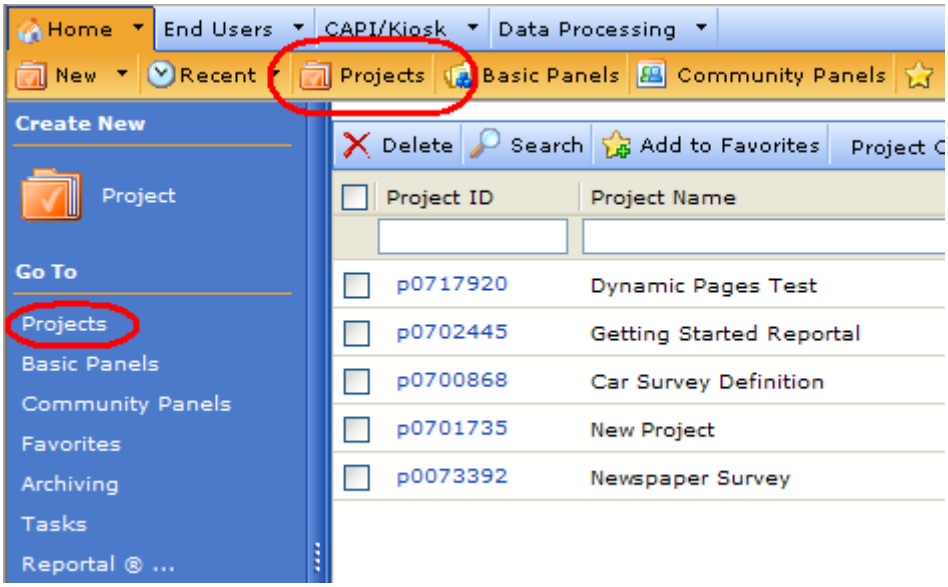


Figure 35 The Home > Projects page

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 (go to Basic Panels on page 356 for more information).

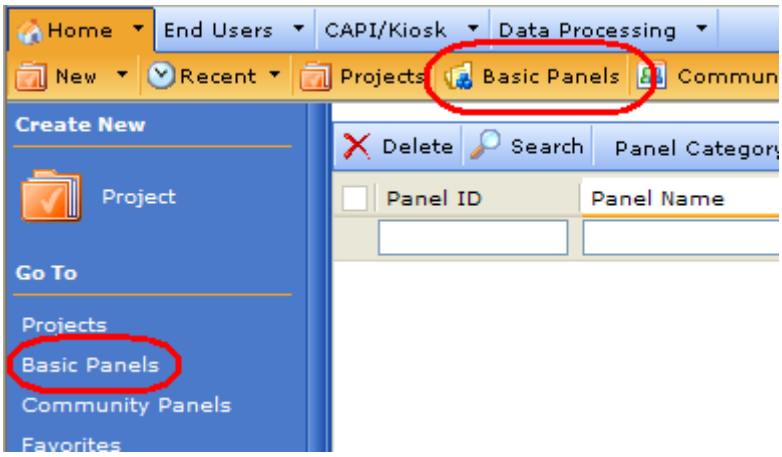


Figure 36 The Home > Basic Panels menu commands

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.

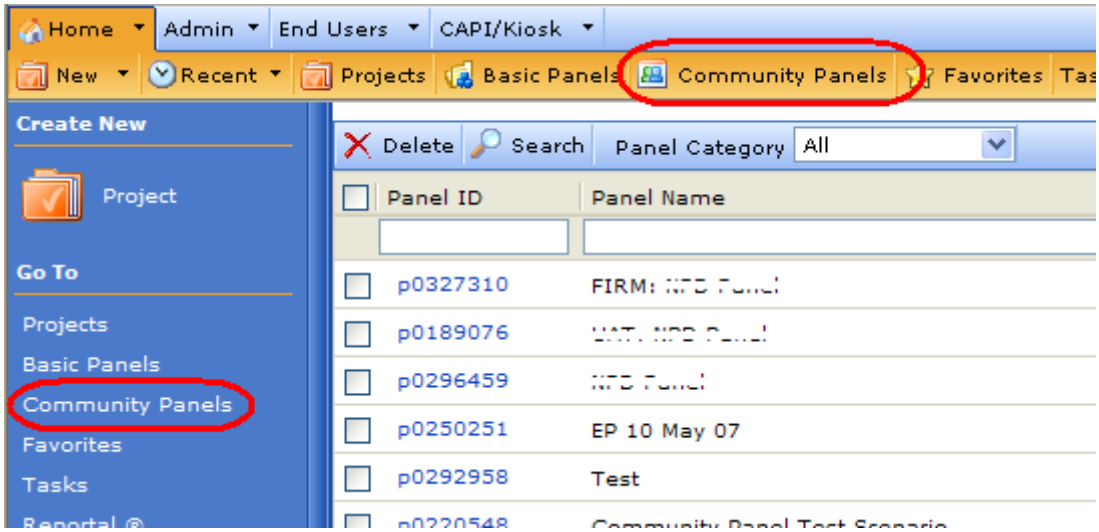


Figure 37 Example of the Home > Community Panels page

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 (go to Search Lists on page 25 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**.

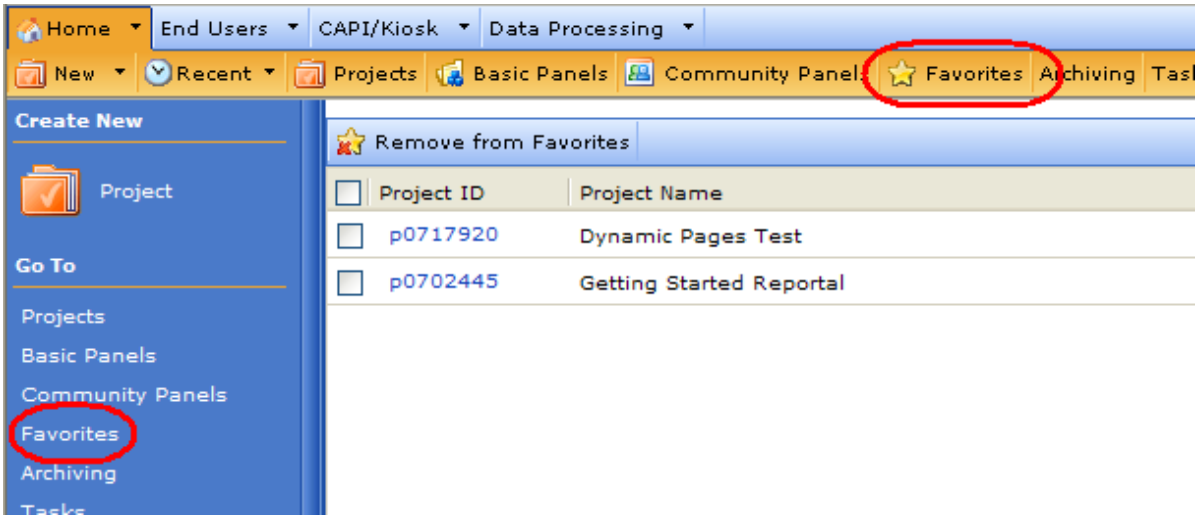


Figure 38 Selecting the Home > Favorites page

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 users with the System Administrator permission to store projects that are inactive.

Note: This functionality requires a setting to be made in the server, and the appropriate user permissions to 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.

On-Demand customers must contact Confirmit Professional Services at support@confirmit.com to be given access to this functionality. On-Premise customers must contact their 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.

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

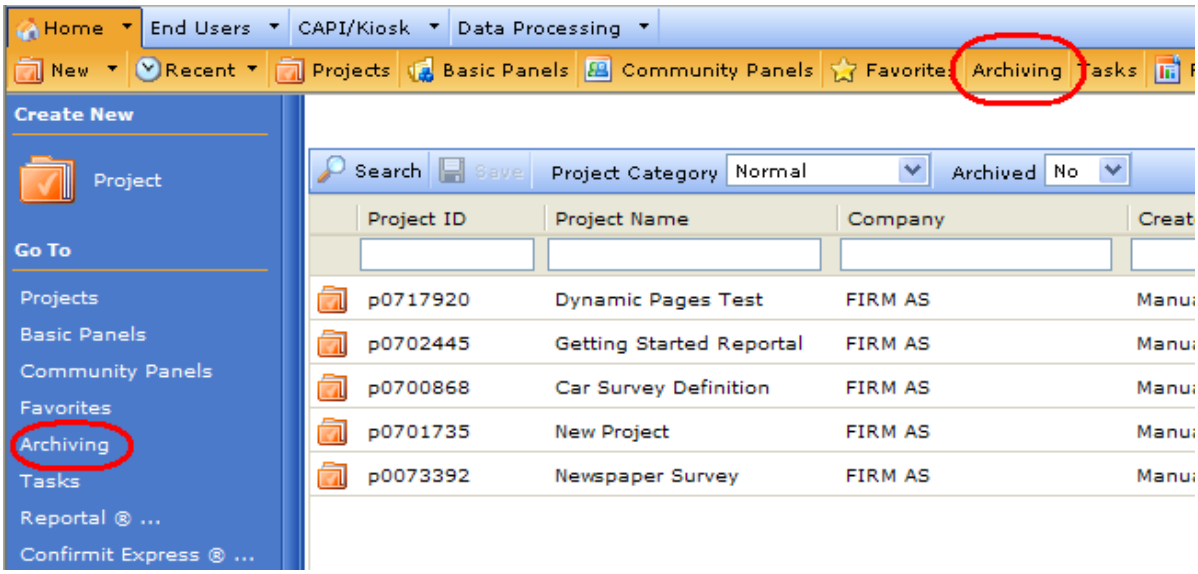


Figure 39 Accessing the Archiving list

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 40 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

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.

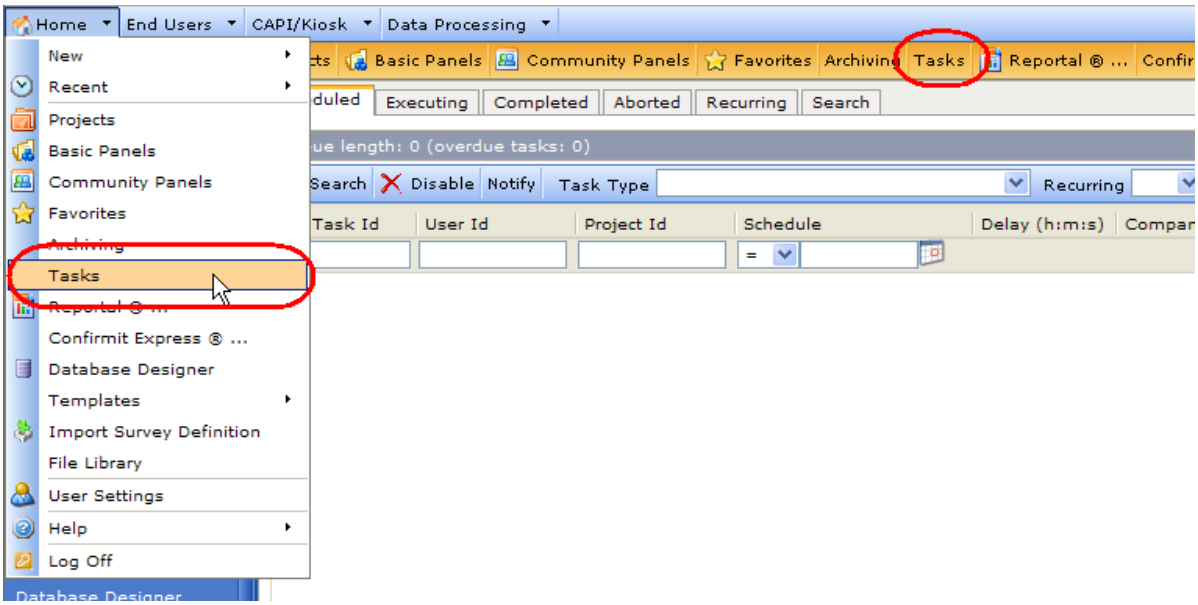


Figure 41 Opening the Tasks page

The Tasks page has six tabs:

- **Scheduled –** A list of the user's pending tasks (go to The Tasks Scheduled Tab on page 33 for more information).
- **Executing –** Task currently being run on the batch server.
- **Completed –** Tasks that did finish within the specified timeframe.
- **Aborted –** Tasks that for some reason did not finish within the specified timeframe.
- **Recurring –** Tasks that have been scheduled to recur at specified time intervals.
- **Search –** Here you can search for your batch job to check its status (go to Searching in the Task Pane on page 35 for more information).

Click on the **Task ID** number in a list to go to the Task Properties overview (go to The Task Properties Page on page 36 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 (go to The Task Properties Recurrence Tab on page 36 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 (go to How to Disable a Scheduled Task on page 35 for more information).
- You can be notified by a popup message on your screen when a task is completed (go to Be Notified when a Task is Completed on page 35 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.

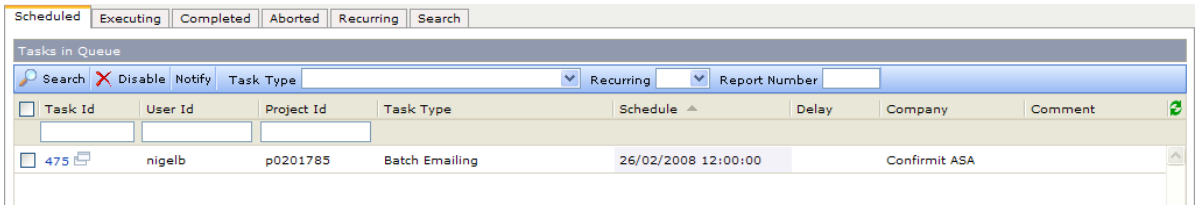


Figure 42 The Tasks Scheduled tab

- 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 you have a number of methods by which you can search for the task you are interested in (go to Searching in the Task Pane on page 35 for more information).
- You can disable an unwanted task (go to How to Disable a Scheduled Task on page 35 for more information).
- You can be notified by a message popup on your screen when a task is completed (go to Be Notified when a Task is Completed on page 35 for more information).

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

4.9.2. The Tasks Executing Tab

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

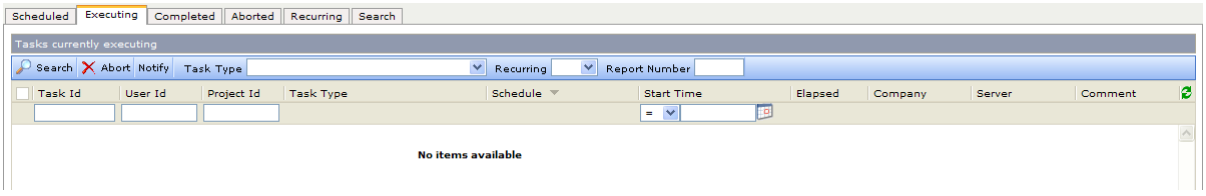


Figure 43 Example of the Tasks Executing tab

- In the event the list is extensive you have a number of methods by which you can search for the task you are interested in (go to Searching in the Task Pane on page 35 for more information).
- You can Abort an unwanted task (go to The Aborted Tasks Tab on page 34 for more information).

- You can be notified by a message popup on your screen when a task is completed (go to Be Notified when a Task is Completed on page 35 for more information).

4.9.3. The Tasks Completed Tab

This tab lists all the tasks that have been completed.

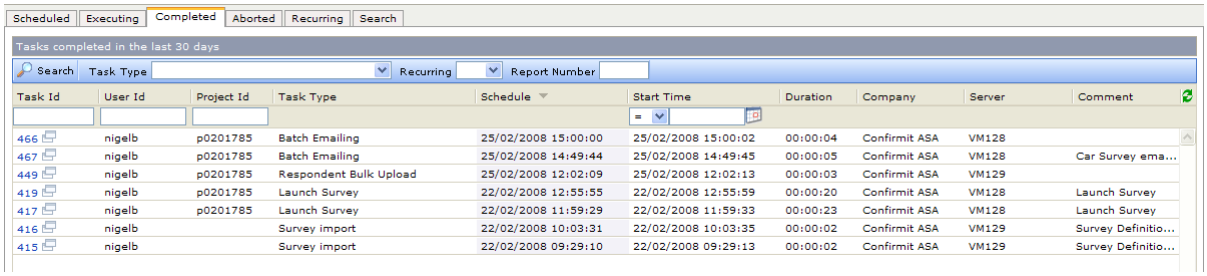


Figure 44 Example of the Task Completed tab

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.

The search functionality in this tab is the same as for the other tabs in the pane (go to Searching in the Task Pane on page 35 for more information).

4.9.4. The Aborted Tasks Tab

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

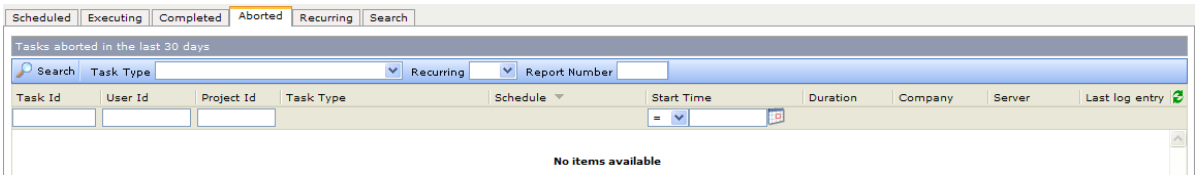


Figure 45 Example of the Tasks Aborted tab

The search functionality in this tab is the same as for the other tabs in the pane (go to Searching in the Task Pane on page 35 for more information).

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 (go to How to Change the Task Owner on page 39 for more information).

4.9.5. The Recurring Tasks Tab

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

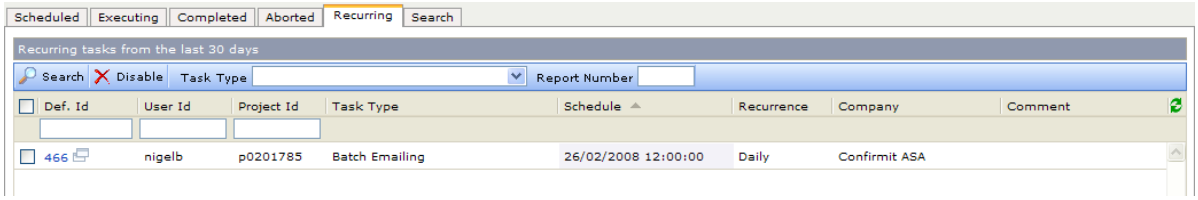


Figure 46 Example of the Tasks Recurring tab

- 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 (go to The Task Properties Page on page 36 for more information)
- You can Disable an unwanted task (go to How to Disable a Scheduled Task on page 35 for more information).
- The search functionality in this tab is the same as for the other tabs in the pane (go to Searching in the Task Pane on page 35 for more information).

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**.

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

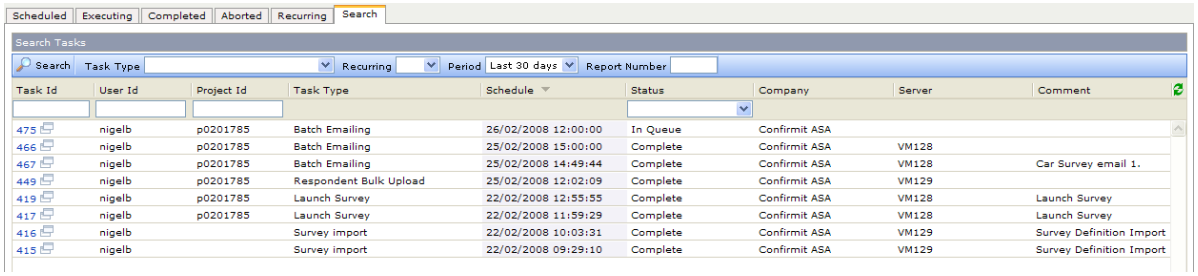


Figure 47 Example of the Task Management pane - Search tab

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.

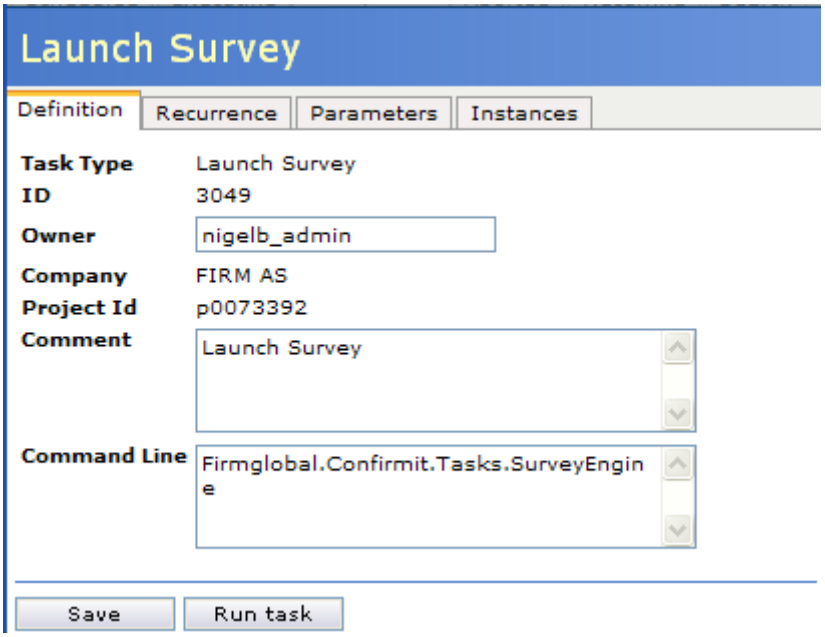


Figure 48 Example of a Task Properties page Definition tab for a Survey Launch task

Note that the information displayed here will depend on the task type. You can run the selected task immediately by clicking on **Run Task**. A confirmation dialog opens; click **OK** to run, **Cancel** to abort the operation.

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.

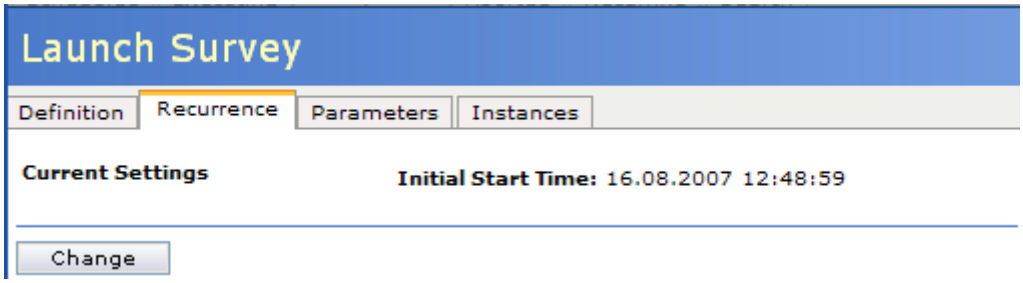


Figure 49 Example of a Task Properties page Recurrence tab

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

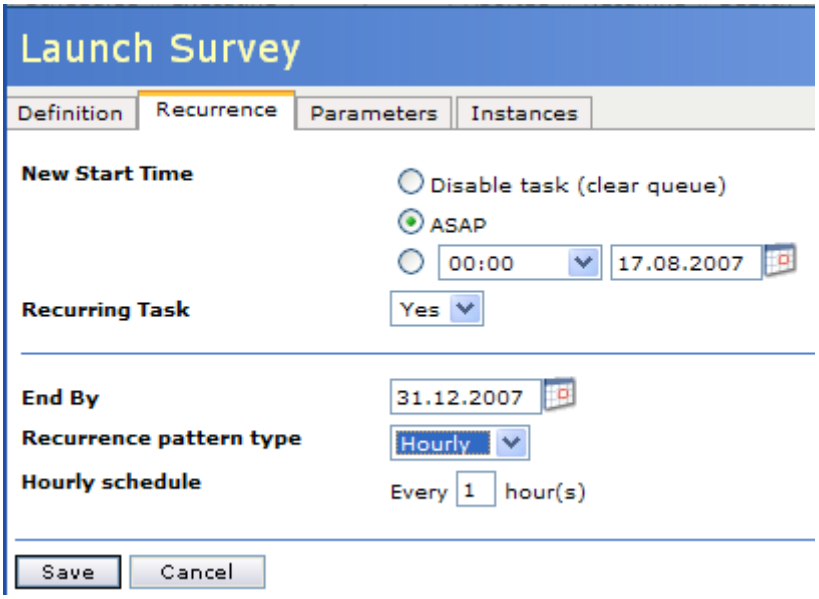


Figure 50 Changing the recurrence setup

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.
3. 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:
   - 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.
   - 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.
   - 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.
   - For monthly recurrences, type in the day of the month and the rate. For example, if you want the job to be executed on the 10th day of every second month, type **10** into the Day box and **2** into the Month box.
6. Click **Save** to save the settings.

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

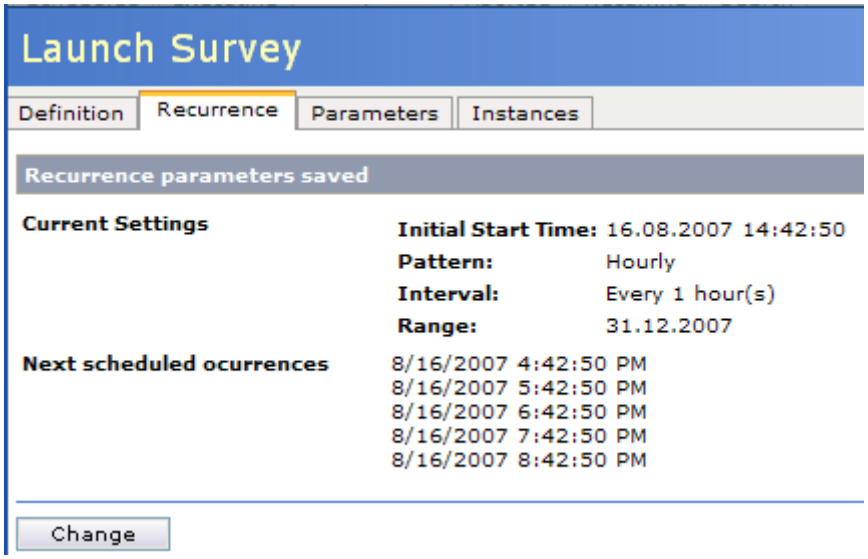


Figure 51 Example of the Recurrence Pattern with a recurrence sequence scheduled

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.

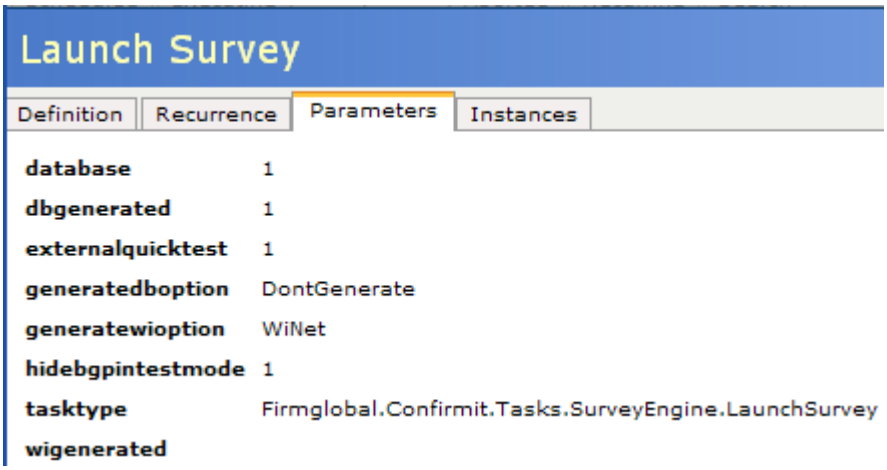


Figure 52 Example of the Task Properties page Parameters tab

4.9.9.3. The Task Properties Instances Tab

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

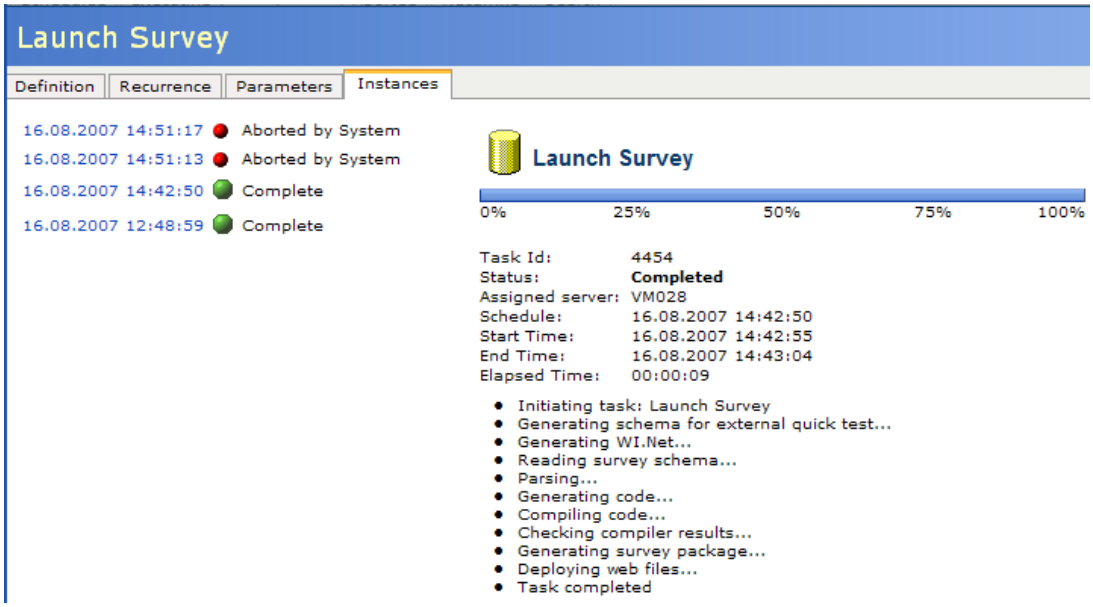


Figure 53 Example of the Task Properties page Instances tab

4.9.9.4. How to Change the Task Owner

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

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

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

   The Task Management page opens.

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

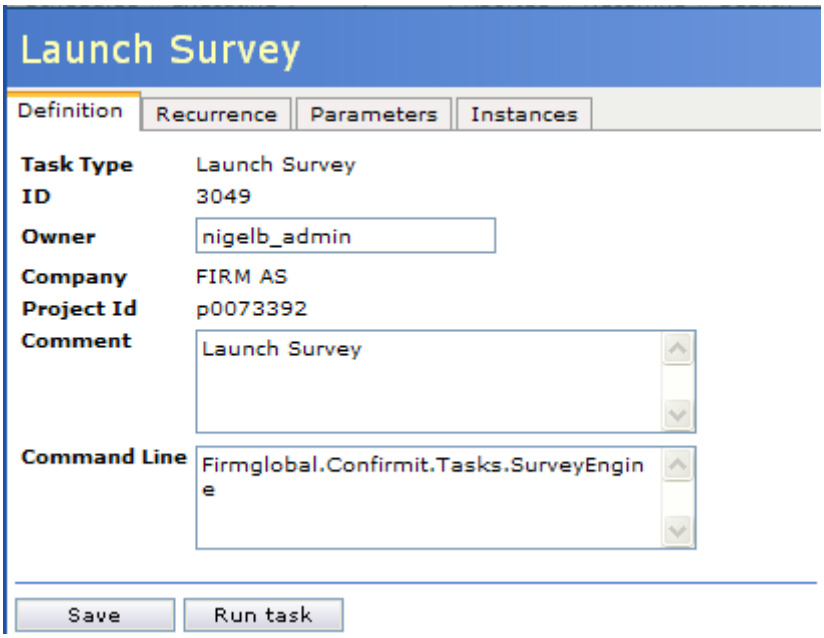


Figure 54 The Definition tab

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.

4.10.1. Background and Benefits

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

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

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

- The document must be well formed (elements nest properly).
- All tags must be written in lowercase.
- All attributes, even numerical ones, must be quoted.
- All elements must also be closed, including empty elements such as img and br. Do this by adding a closing slash to the start tag: and
.
- Attribute minimization (for example, <option selected>) is prohibited; instead, use <option selected="selected">.

Using Survey Layouts provides many advantages:

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

4.10.1.1. Extensibility

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

4.10.1.2. Cleaner, More Logical Markup

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

4.10.1.3. Increased Portability

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

4.10.1.4. Greater Accessibility

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

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

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

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

4.10.1.5. CSS - Cascading Style Sheets

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

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

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

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

4.10.2. Accessing Survey Layouts

Survey Layouts can be accessed 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 alter all surveys that are re-launched after the changes have been saved (assuming the layout is used).
- **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**.

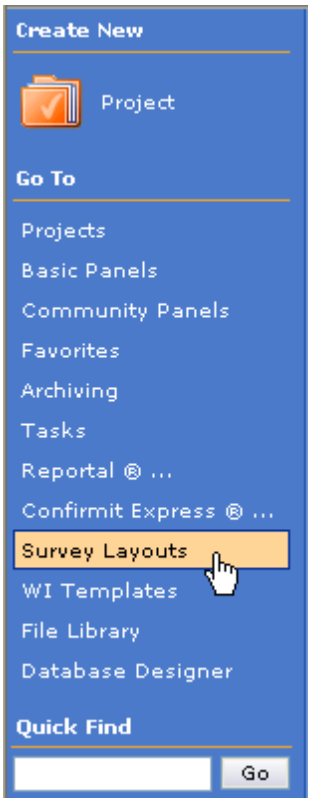


Figure 55 Choose Survey Layouts on the Quick Access Pane

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.



Figure 56 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.

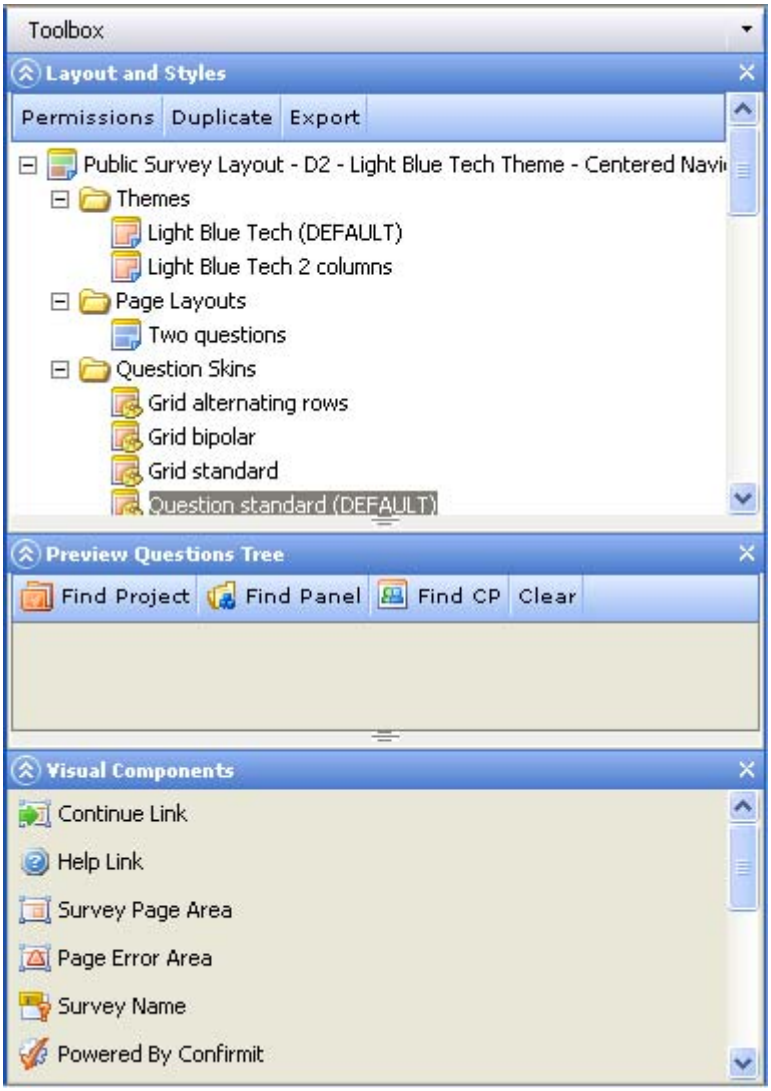


Figure 57 The Toolbox layout for a Global Survey Layout

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. Global Survey Layout Permissions

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

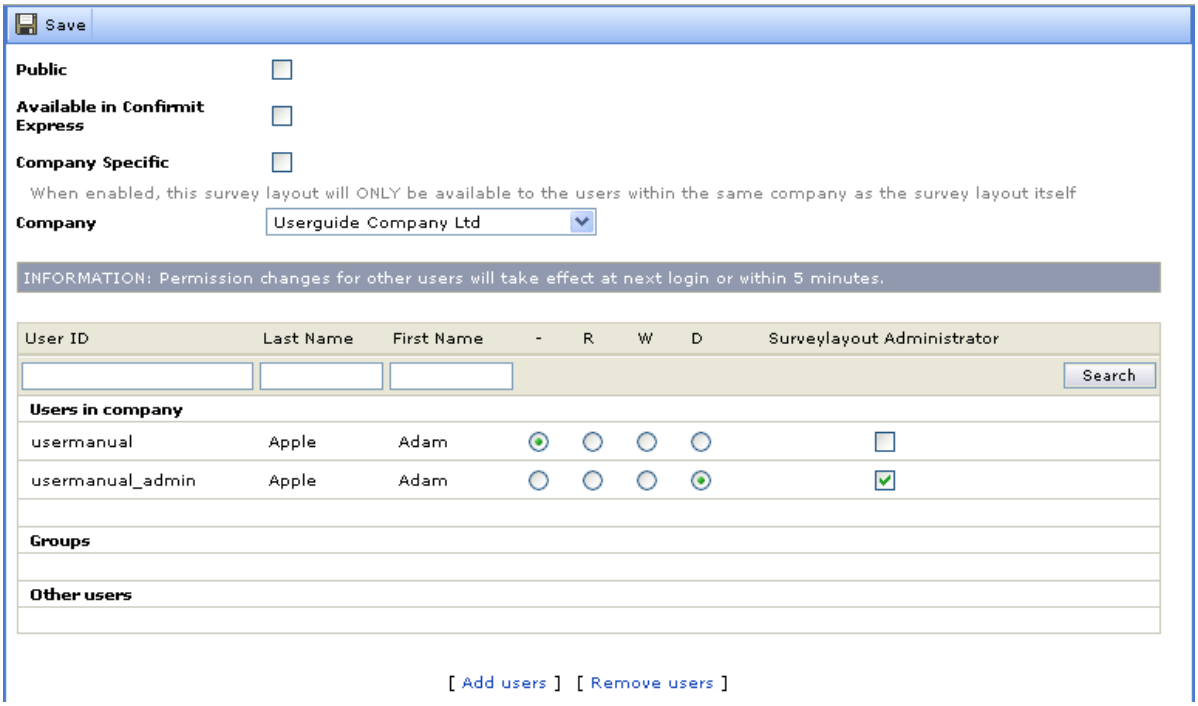


Figure 58 A Global Survey Layout's Permissions page

The Permissions page includes three 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.
- **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 Company's ASP customers). You can duplicate a public layout, but not modify it. 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:

Default is No permission (the **-** column is selected for the user).

- **R (Read) –** the user can access and use the Survey layout. The **Save** button is disabled.
- **W (Write) –** the user can 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.
- **D (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 users –** click to open a dialog that allows you to add users to the list.

On completion, save any changes.

4.10.2.3. 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 (go to Survey Settings on page 310 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.

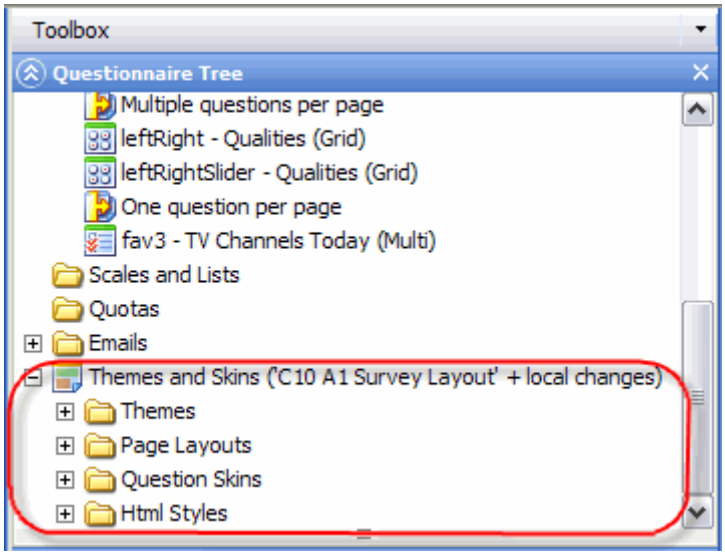


Figure 59 Direct access to Survey Layouts via the Questionnaire Tree

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.

4.10.2.3.1. 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**.

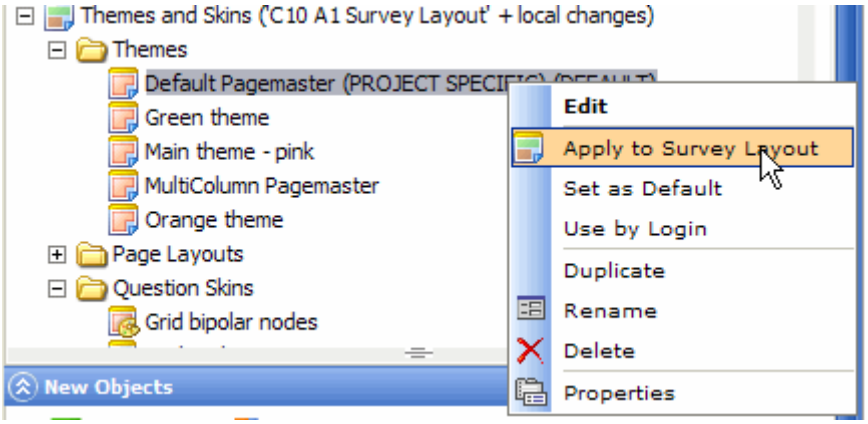


Figure 60 Applying a project-specific layout to Survey Layout

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. 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 (go to Greater Accessibility on page 40 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.

4.10.3.1. 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.

4.10.3.1.1. How to Assign a Theme to a Survey Page

In the survey, you specify the theme on **Page** objects and/or on **Directives** inside the Questionnaire Tree. Note that Confirmit will use the default theme for every interview page where no other theme is specified.

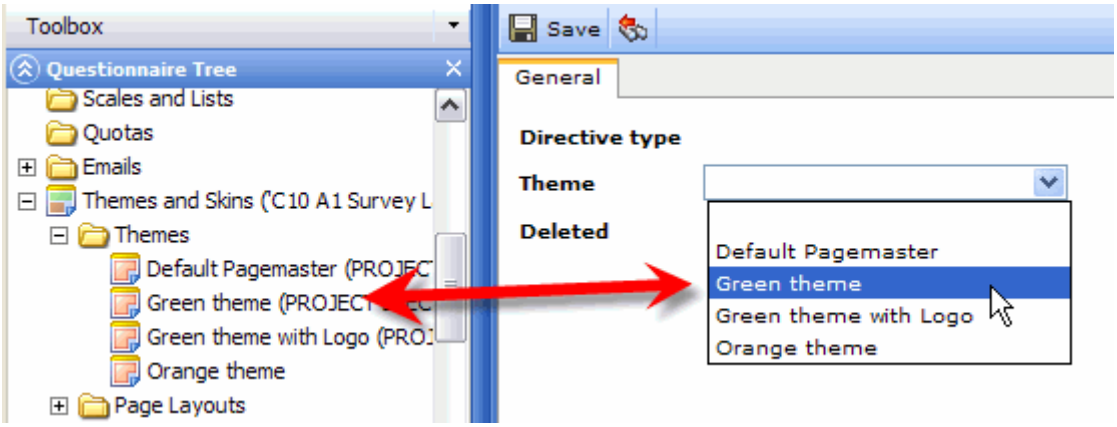


Figure 61 You can select the theme on Directives and Page objects

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

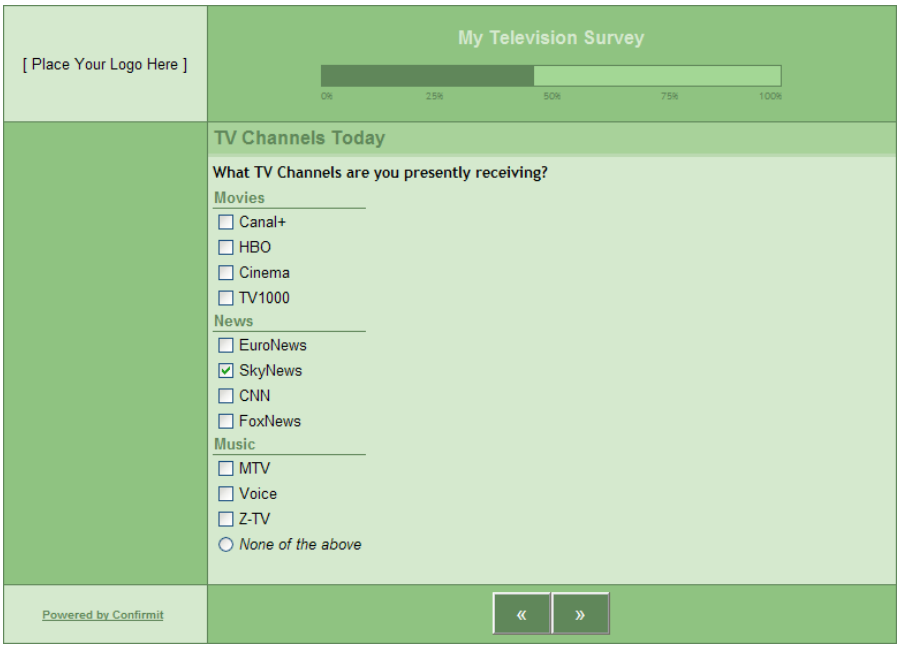


Figure 62 A multi question with the "Green theme"

If instead the "Orange theme" is specified, the multi question will be presented as shown below.

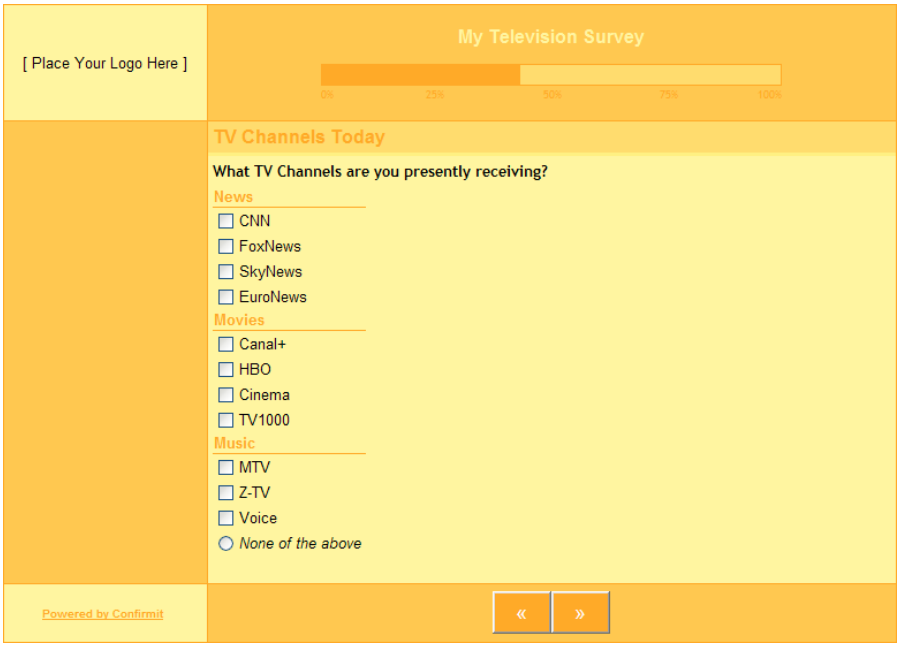


Figure 63 The same multi question with the "Orange theme"

4.10.3.1.2. How to Set the Default Theme

To set one of the themes as the default, right-click on the theme and 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, Default Pagemaster is currently the default theme. However in this case if **Set as Default** is clicked now, the "Green theme" will become the default.

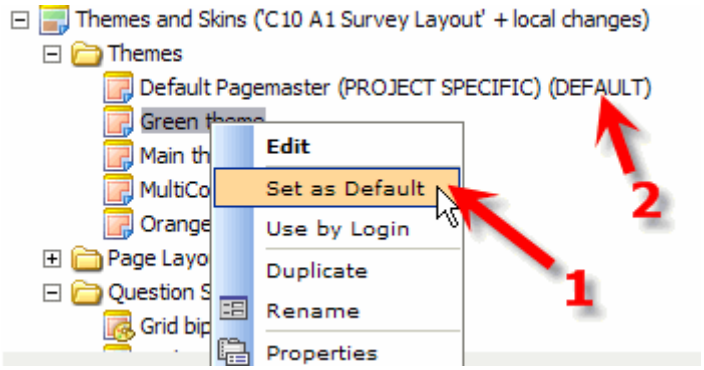


Figure 64 Setting a theme as Default

4.10.3.1.3. How to Edit a Theme

To open a Theme for editing, double-click on its name in the Layout and Styles toolbox, or right-click and choose **Edit**.

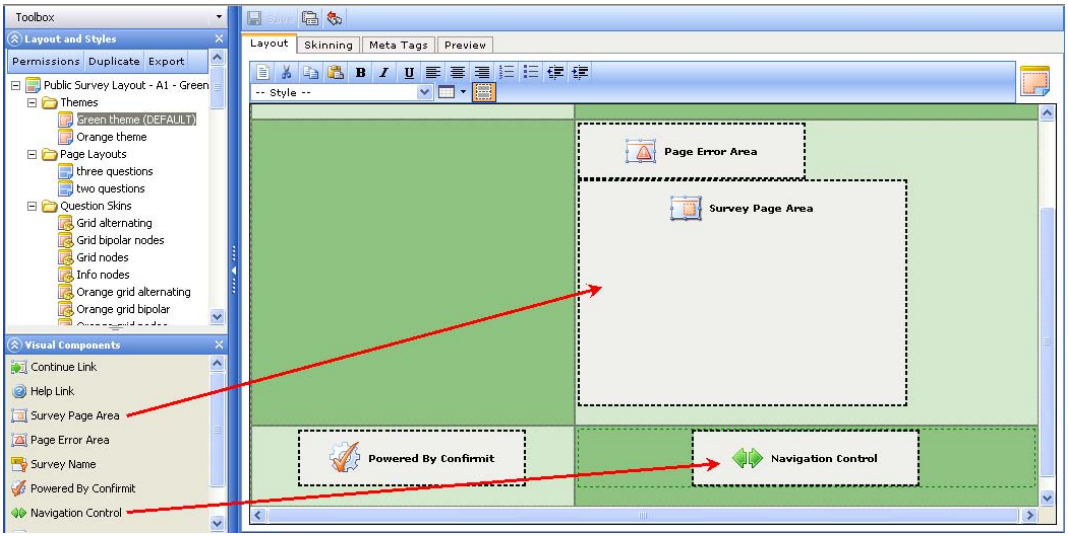


Figure 65 Editing a Theme

There are eight 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 two 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.

4.10.3.1.4. 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.

4.10.3.1.5. 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).

4.10.3.1.6. The Skinning Tab

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

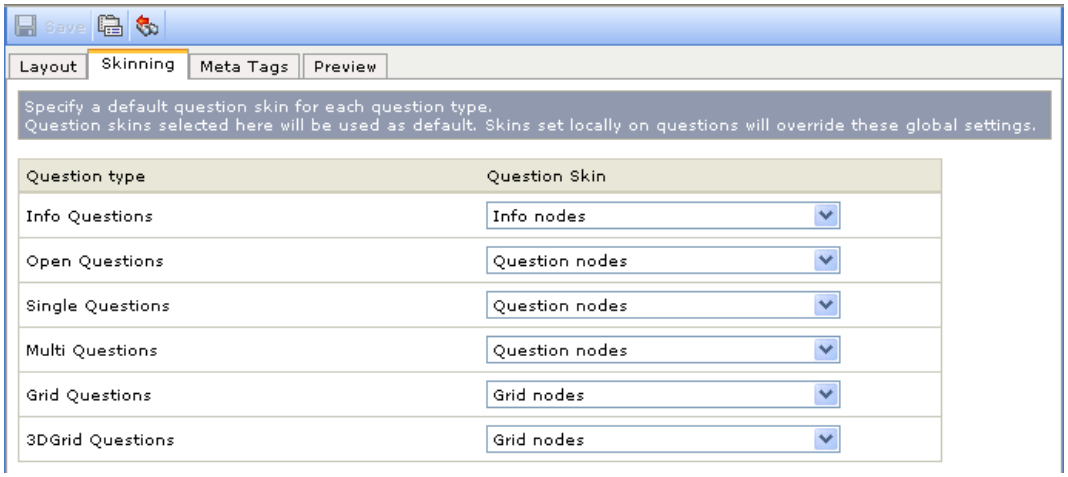


Figure 66 Example of the Skinning tab

4.10.3.1.7. 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.

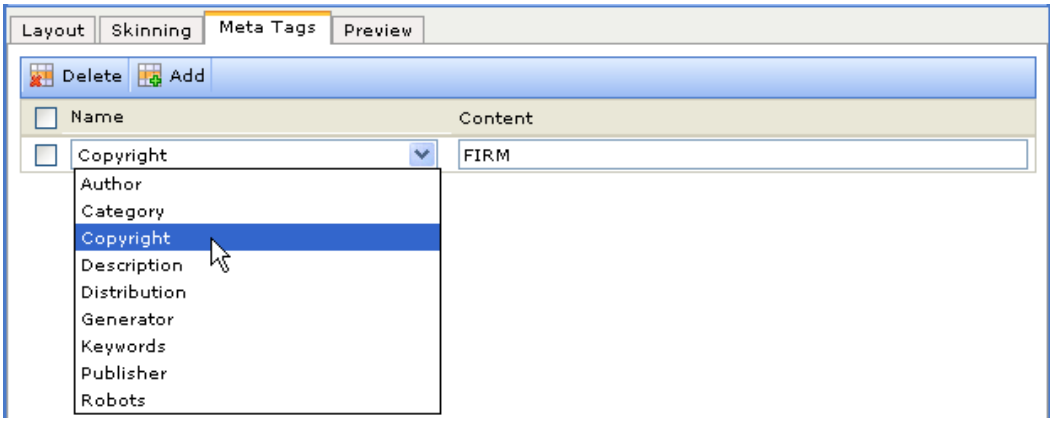


Figure 67 Example of the Meta Tag tab

4.10.3.1.8. Theme Properties

Right-click on a Theme and select **Properties** to open the Properties page for that Theme.

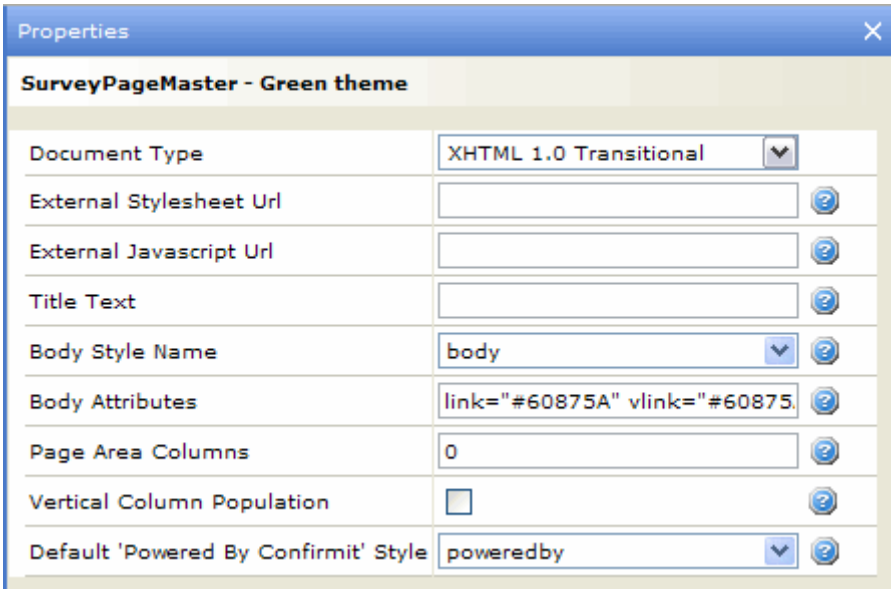


Figure 68 Example of a Theme's Properties page

- **Document Type –** choose a standard for the document type.
- **External Stylesheet Url –** you do not have to re-define your styles inside Survey Layouts if you already have these set up outside of Confirmit. In this case, enter the URL of the **.css** file that holds the definitions, and refer to the style names directly in your survey.
- **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.
- **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.

4.10.3.1.9. 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.

4.10.3.2. Page Layouts

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.

For some projects there is no need to use Page Layouts as Themes and Questions Skins will suffice. Use a Page Layout when you want one or more survey pages to display questions in a particular way. In the properties of a Theme you can easily 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”).

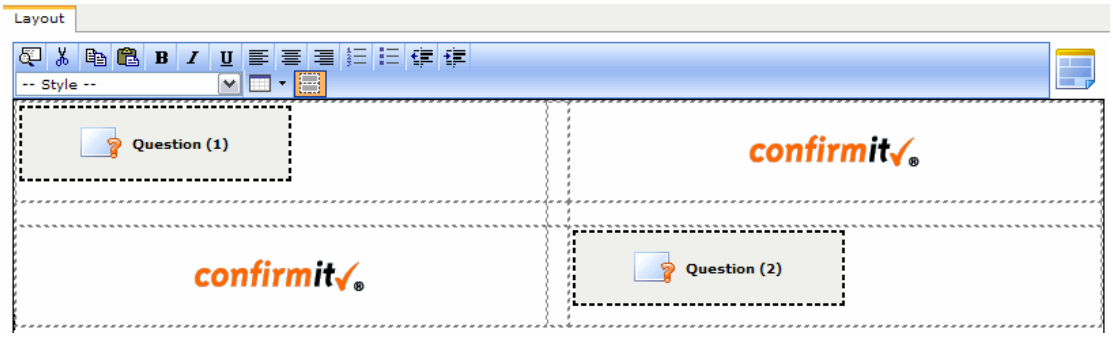


Figure 69 Example of the Page Layout

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.

4.10.3.3. 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 (go to How to Set the Default Skin on page 51 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. 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 (go to HTML Styles on page 65 for more information)

4.10.3.3.1. 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.

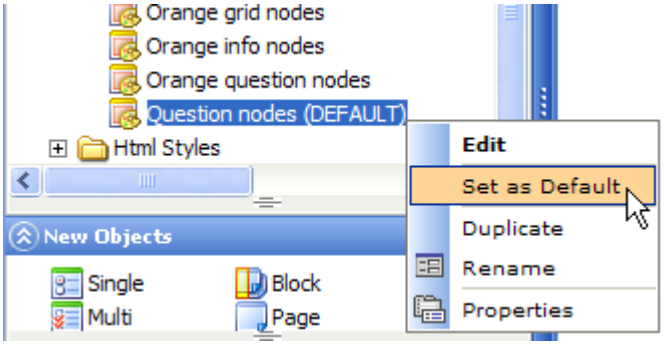


Figure 70 Setting a skin as Default

3. Save the changes.

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

4.10.3.3.2. How to Edit a Question Skin

To edit a Question Skin, double-click on its name in the Questionnaire Tree, or right-click on it and choose **Edit**. This opens the Page Editor for the skin as shown below.

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.

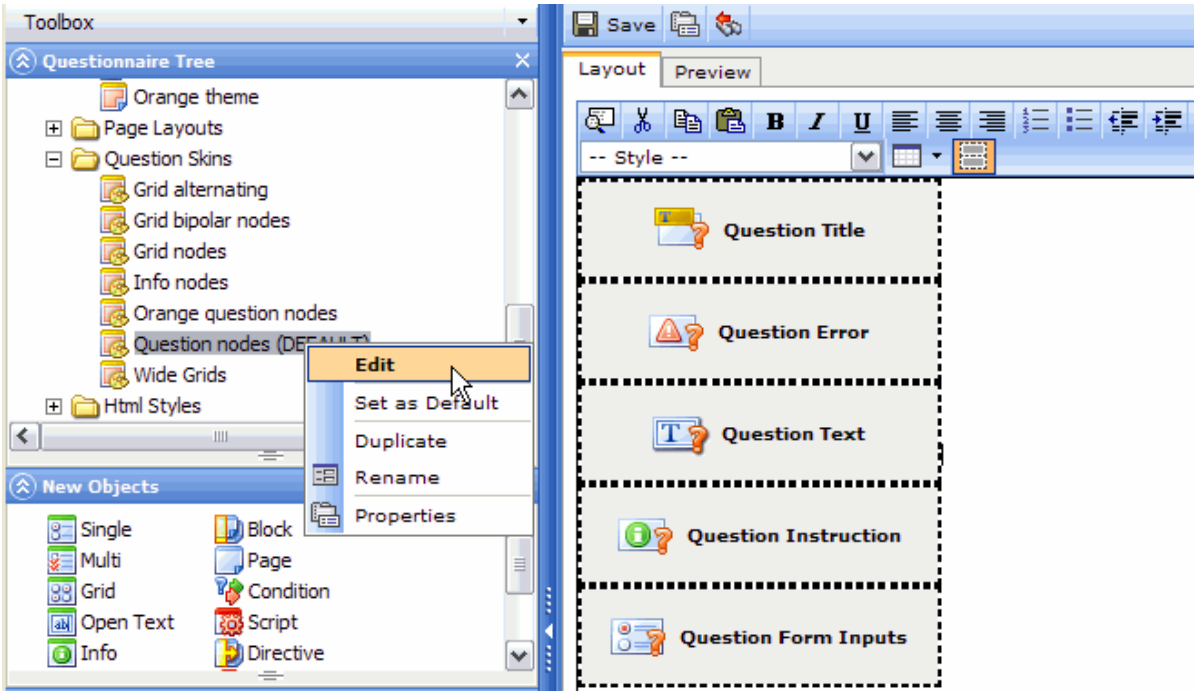


Figure 71 Editing a Question Skin

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.

As with Themes (go to Themes on page 46 for more information), double-click on a question component (or right-click and choose **Edit**) to change the HTML style for that component (go to How to Edit the Question Components on page 64 for more information).

4.10.3.3.3. 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.

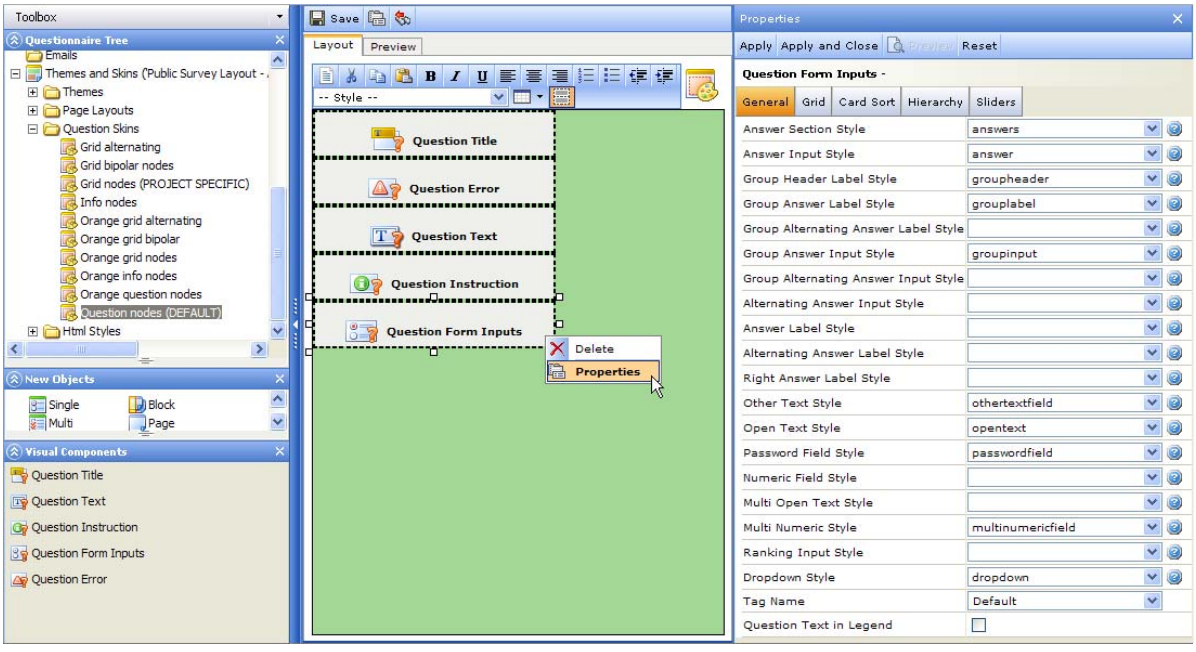


Figure 72 Example of the Question Form Inputs component's properties

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 **(go to HTML Styles 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 Section Style

The **Answer section Style** (the area with red background) specifies a style for the entire answer-region of a question.

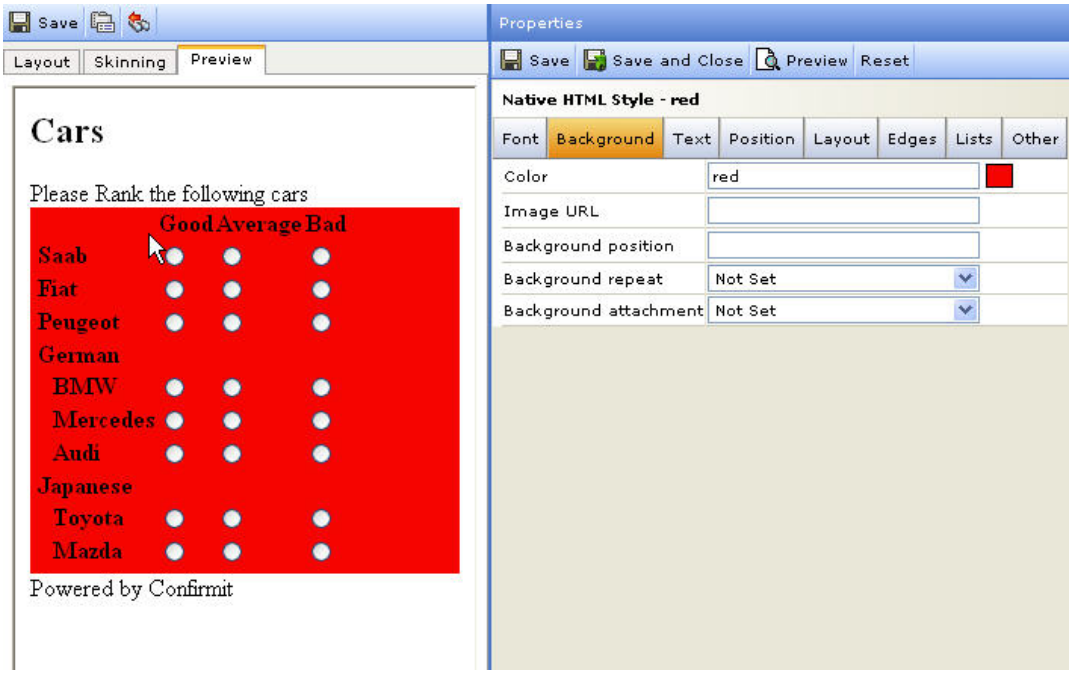


Figure 73 Example of the Answer Section style

Answer Input Style

The **Answer Input Style** (the areas with red backgrounds) specifies a style for the input cells.



Figure 74 Example of the Answer Input style

Scale Style

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

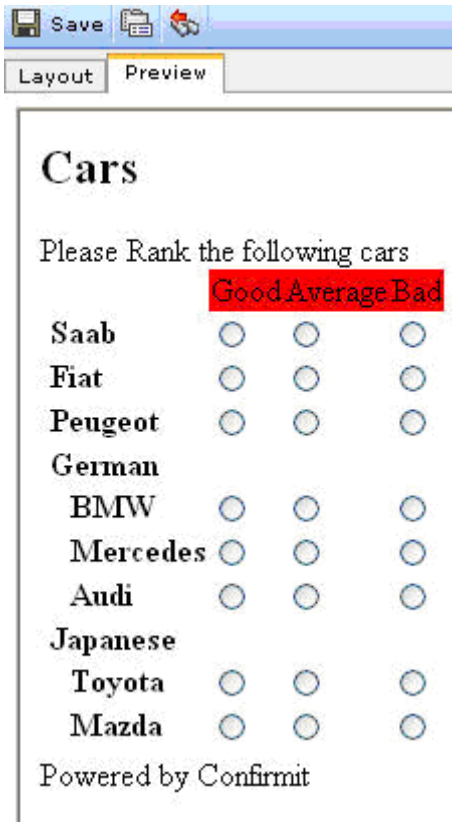


Figure 75 Example of the Scale style

Scale Group Header Label Style

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

Scale Group Answer Label Style

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

Scale Bar Label Style

This specifies the style of a scale bar. If this is not specified, the general label style will be used. Note that scale bars should have a background color specified to be clearly visible (go to Scale on page 159 for more information).

Group Header Label Style

This specifies the style for the group header labels, as shown below with red background.

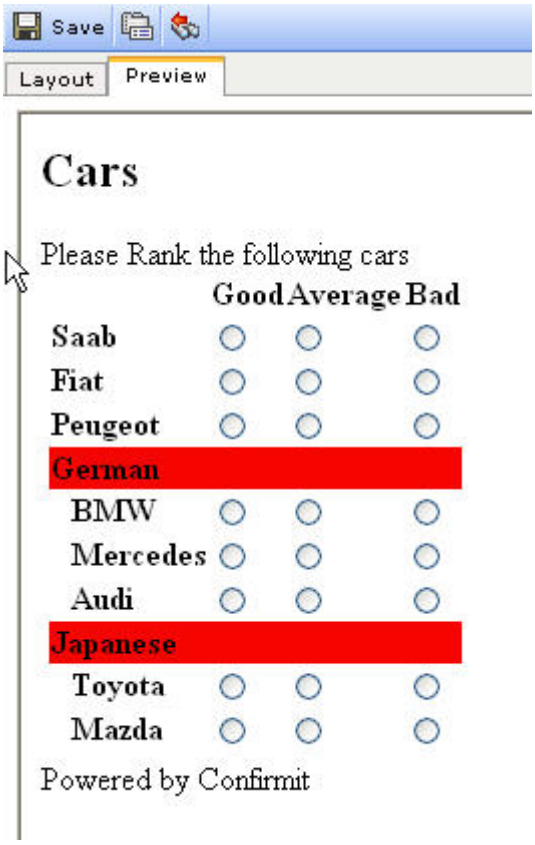


Figure 76 Example of the Group Header Label style

Group Answer Label Style

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



Figure 77 Example of the Group Answer Labels style

Group Answer Input Style

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

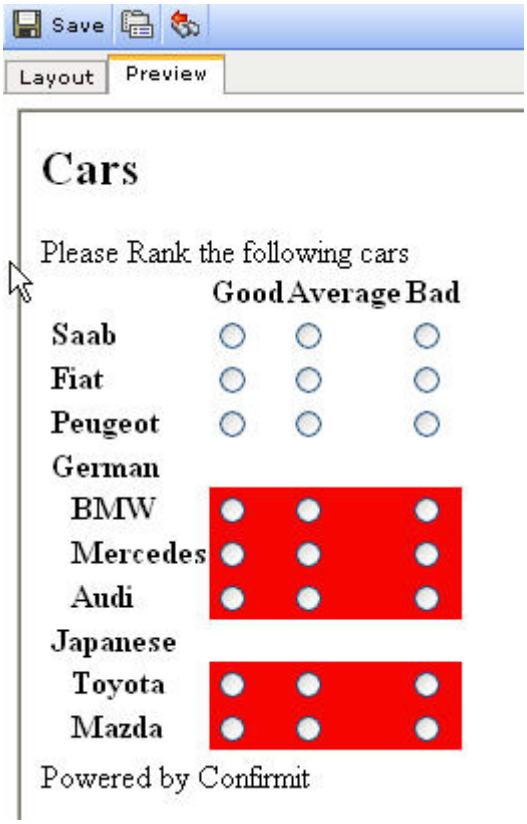


Figure 78 Example of the Group Answer Input style

Alternating Answer Input Style

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

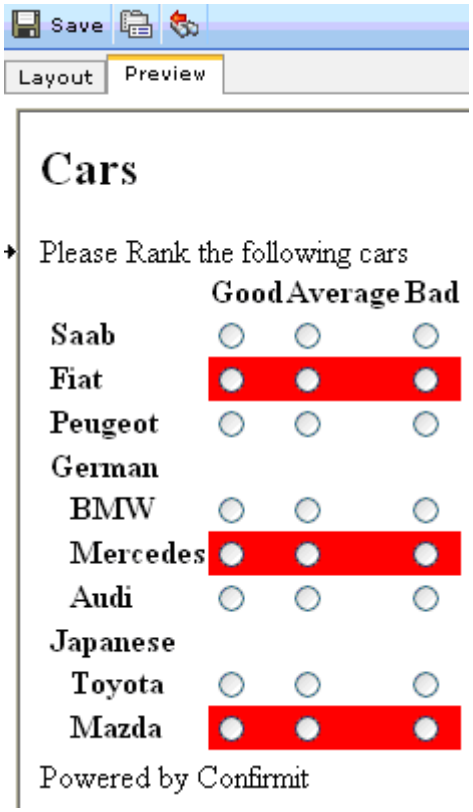


Figure 79 Example of the Alternating Answer Input style

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.

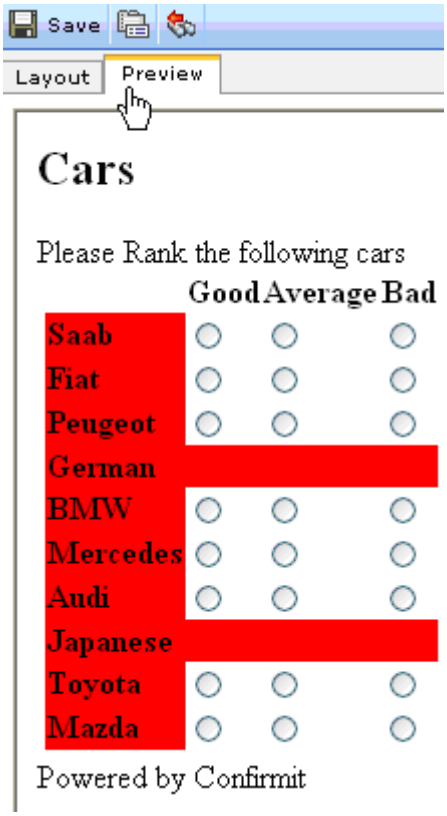


Figure 80 Example of the Answer Label style

Alternating Answer Label Style

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

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



Figure 81 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.

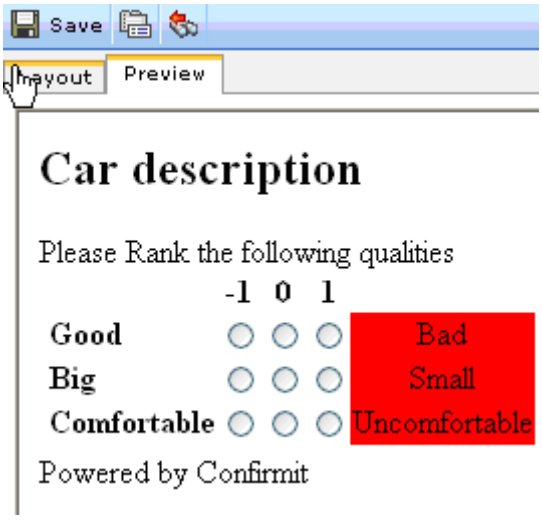


Figure 82 Example of the Right Answer Label Style

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.

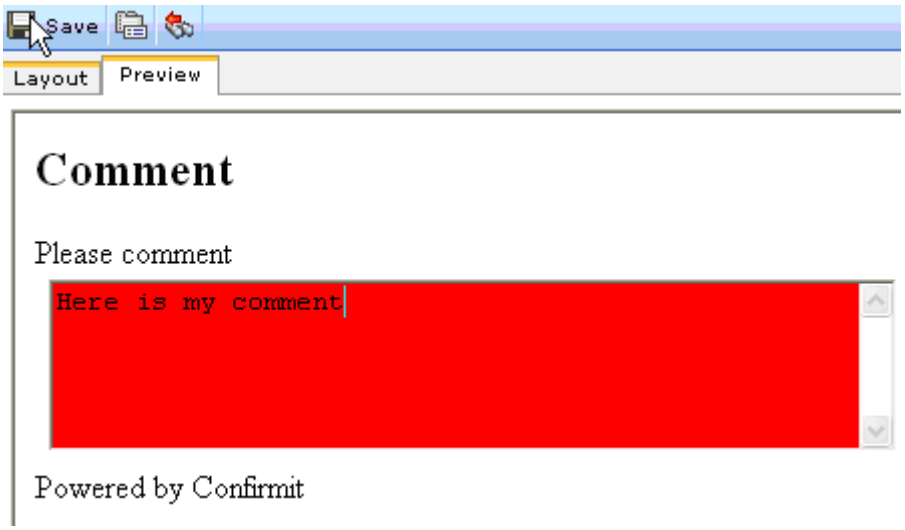


Figure 83 Example of the Open Text style

Drop-down Style

This style sets the properties for drop-down lists.

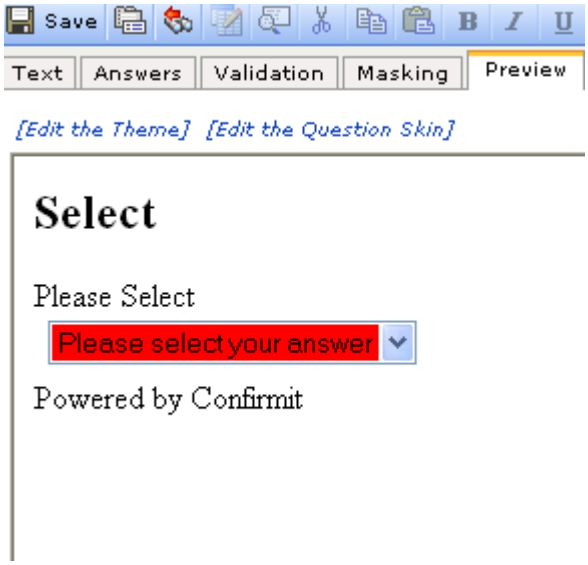


Figure 84 Example of the Drop-down style

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.

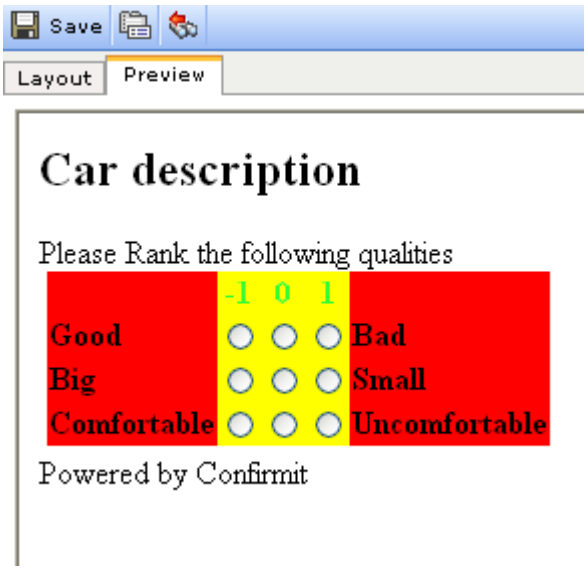


Figure 85 Example of the Grid Label Style

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).

Style on Specific Answer

This is not really part of a Question Skin, but be aware that you can override the style on specific answer alternatives. Do this inside the answers' tab inside each question.

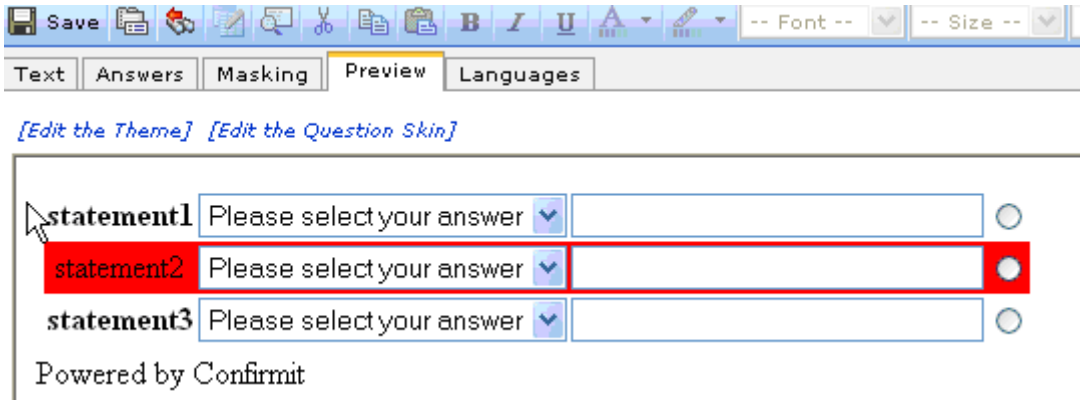


Figure 86 Example of a Style on Specific Answer

4.10.3.3.4. 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) (go to HTML Styles on page 65 for more information)

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

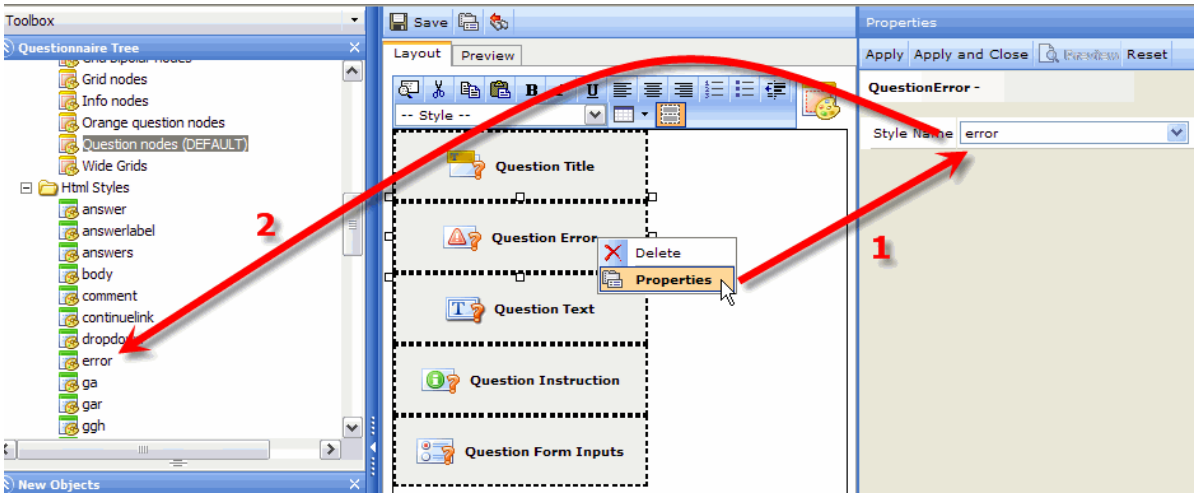


Figure 87 Editing a Question Visual Component

4.10.3.3.5. 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'.

4.10.3.4. 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.

4.10.3.4.1. 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.

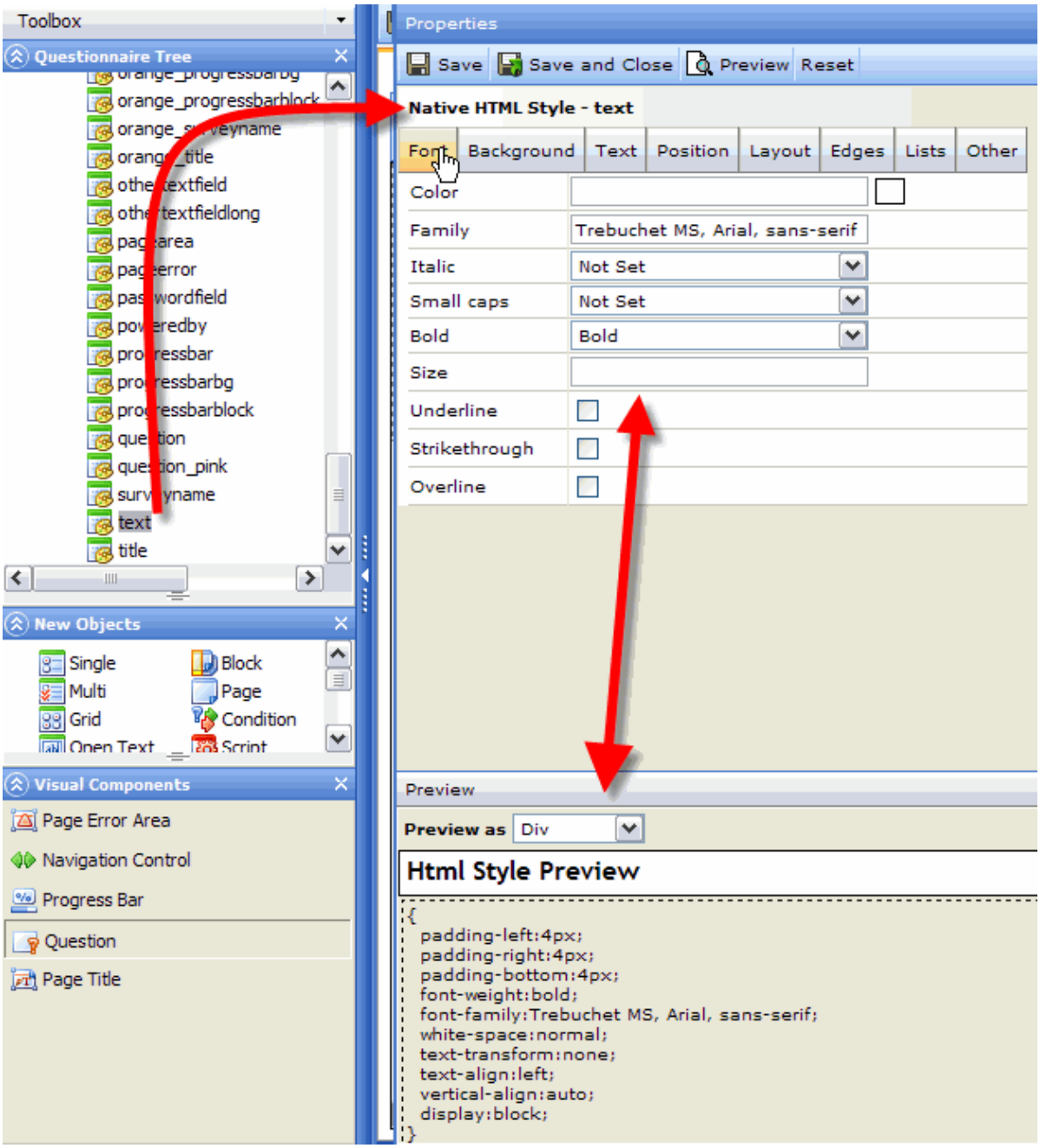


Figure 88 Working with HTML Styles

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.

4.10.3.4.2. 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.

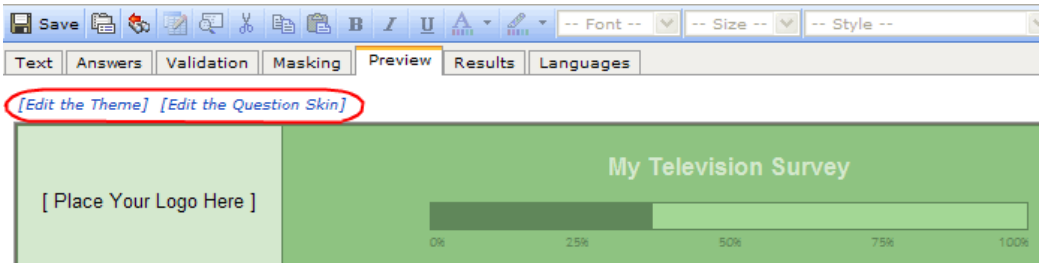


Figure 89 Shortcuts from Question Preview

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

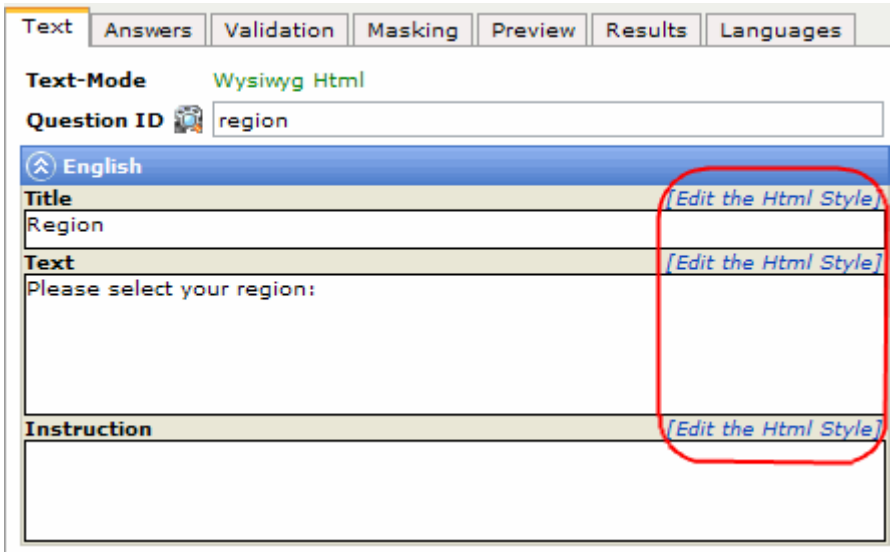


Figure 90 Shortcuts from Question Texts

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

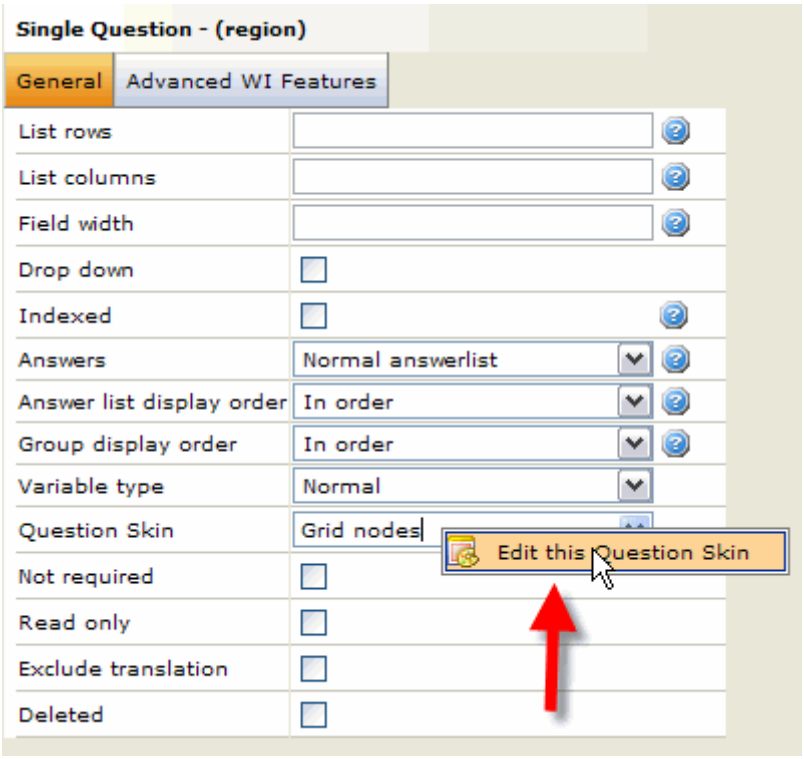


Figure 91 Shortcut to Styles

4.10.3.4.3. HTML Style Properties

The HTML Style Properties sheet contains eight tabs as follows.



Figure 92 The Style Properties sheet tabs

- **Font** - defines the font color, family, size etc. of the text used in the style (go to HTML Style Properties > Font Tab on page 70 for more information).
- **Background** - defines the color and background image (if used) for the style (go to HTML Style Properties > Background Tab on page 70 for more information).
- **Text** - defines letter spacing, indents, alignments etc. for any text used in the style (go to HTML Style Properties > Text Tab on page 71 for more information).
- **Position** - defines the position on the page for elements using this style (go to HTML Style Properties > Position Tab on page 72 for more information).
- **Layout** - defines how items using this style are to appear on the page (go to HTML Style Properties > Layout Tab on page 73 for more information).
- **Edges** - defines how the margins and border lines for objects using the style are to look (go to HTML Style Properties > Edges Tab on page 75 for more information).
- **Lists** - defines how any lists using the style are to look (go to HTML Style Properties > Lists Tab on page 75 for more information).
- **Other** - lists other properties that do not fall naturally under the other tabs (go to HTML Style Properties > Other Tab on page 76 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.

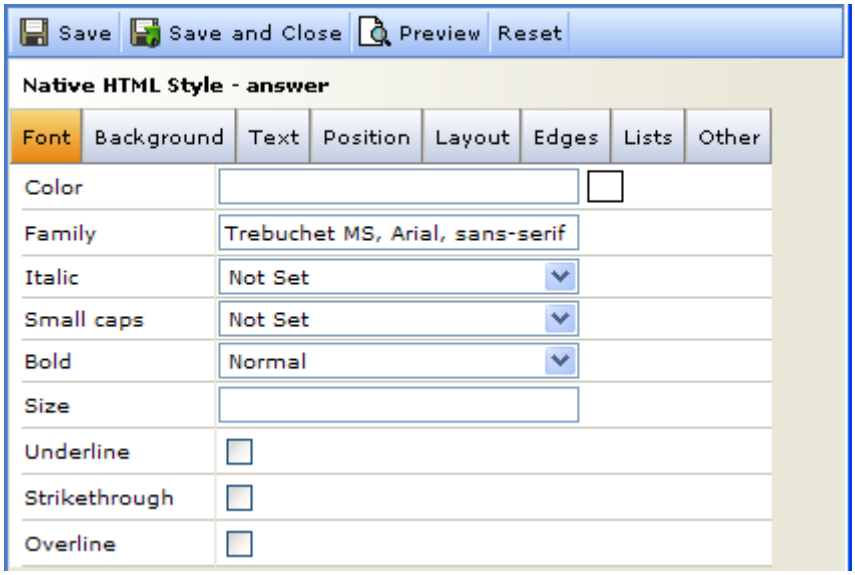


Figure 93 The HTML Style Properties > Font tab

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. Type a size into the field and apply/save the changes.
- **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.

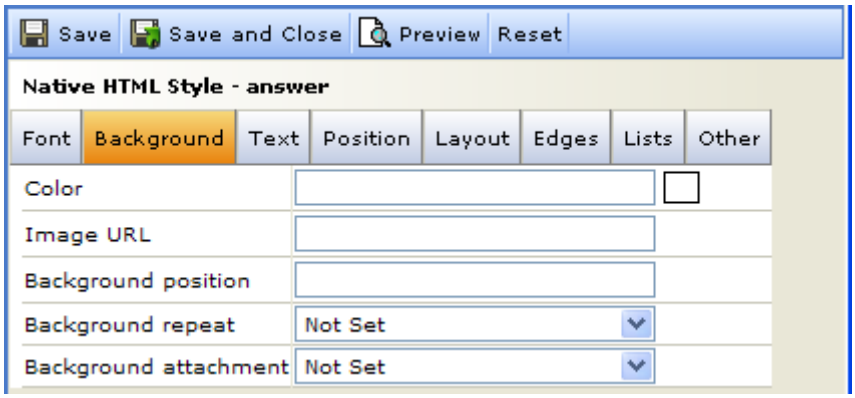


Figure 94 The HTML Style Properties > Background tab

- **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:
  - **Not set** - (default).
  - **NoRepeat** - the image is only shown once in the object.
  - **Repeat** - the image repeats in both directions.
  - **RepeatX** - the image only repeats in the X (vertical) direction.
  - **RepeatY** - the image only repeats in the Y (horizontal) direction.
  - **Inherit** - the image inherits the Repeat property from the stylesheet.
- **Background attachment** - specifies how the background image is to be attached to the object. The options are:
  - **Not set** - (default).
  - **Fixed** - the image is fixed within the viewing area.
  - **Scroll** - the image moves with the object as the respondent scrolls the questionnaire page.
  - **Inherit** - the image inherits the Attachment property from the stylesheet.

HTML Style Properties > Text Tab

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

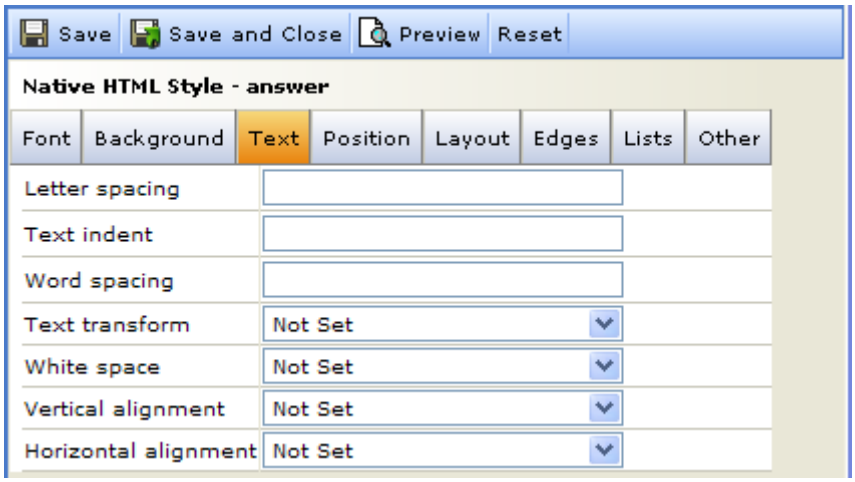


Figure 95 The HTML Style Properties > Text tab

- **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.
- **Text transform** - specify how the text in the object is to be the rendered. The options are:
  - **NotSet** - (default) the text is presented as written.
  - **Capitalize** - makes the first letter of every word upper-case.
  - **Lowercase** - makes all the letters lower case.
  - **Uppercase** - makes all the letters upper case.
  - **None** - text is not transformed.
- **White space** - defines how lines of text are to be wrapped within the object. The options are:
  - **NotSet**
  - **Normal** - (Default) White space is ignored by the browser.
  - **NoWrap** - line breaks are suppressed. Content does not wrap to the next line.
  - **Pre** - white space is preserved by the browser.
- **Vertical alignment** - specify how the text is to be positioned, vertically, within the object.
- **Horizontal alignment** - specify how the text is to be positioned, horizontally, within the object.

HTML Style Properties > Position Tab

The properties on this tab set the details for text in the selected object.

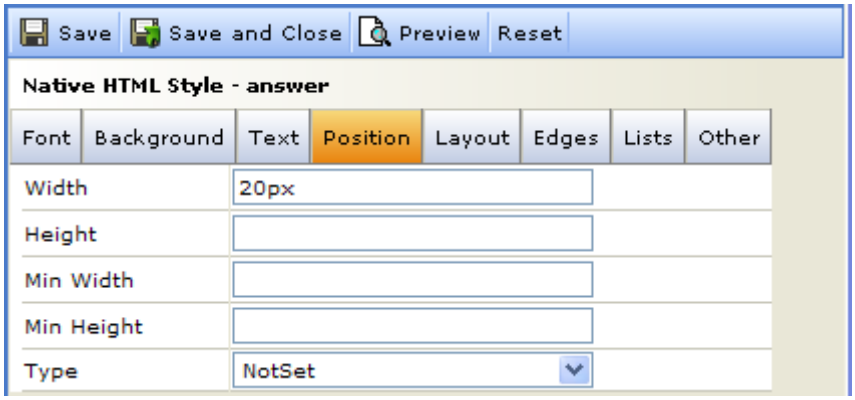


Figure 96 The HTML Style Properties > Position tab

- **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.
  - **Static** - (Default) an element with this position type always has the position defined by the normal flow of the page. A Static element ignores any top, bottom, left or right declarations.
  - **Relative** - this position type moves an element relative to its normal position. For example, "Left:20" adds 20 pixels to the element's "Left" position.
  - **Absolute** - the element is positioned at the specified coordinates relative to its containing block. The element's position is specified with the "Left", "Top", "Right" and "Bottom" properties.

HTML Style Properties > Layout Tab

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

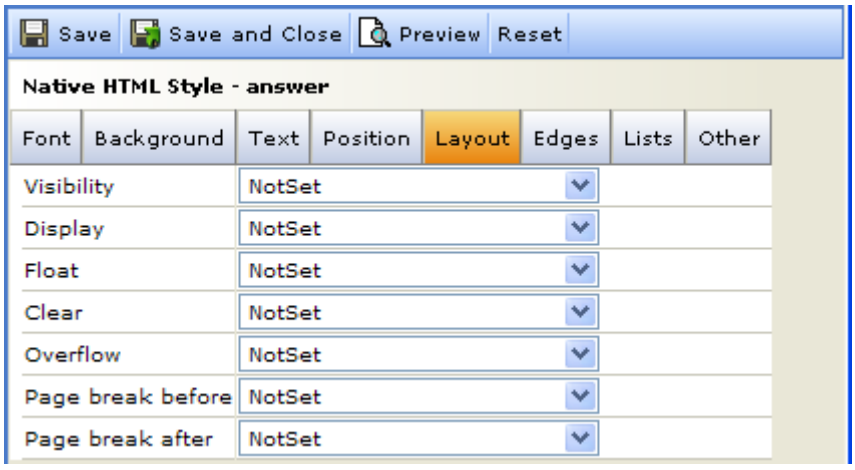


Figure 97 The HTML Style Properties > Layout tab

- **Visibility** - this property specifies whether or not the content of the object is to be displayed. The options are:
  - **NotSet**
  - **Visible** - the object content is visible.

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

HTML Style Properties > Edges Tab

The properties on this tab set the details for text in the selected object.

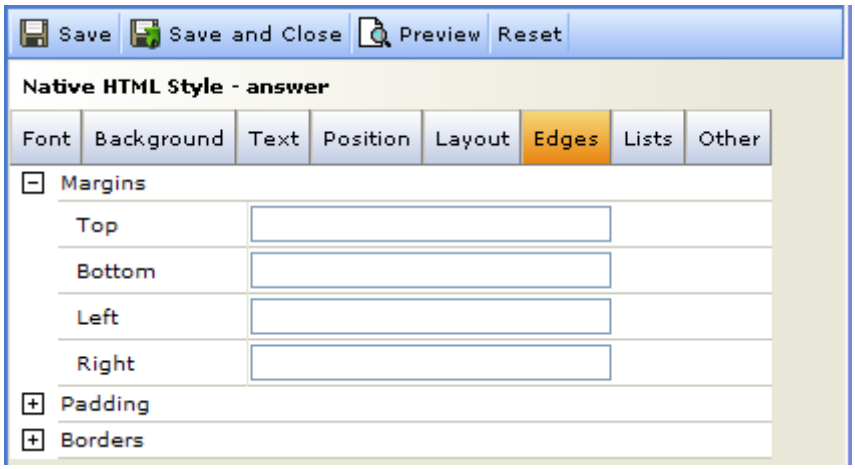


Figure 98 The HTML Style Properties > Edges tab

- **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.
  - **Color** - if the Border Width property is set to a value greater than 0, then the resulting border line will have the color specified here.
  - **Style** - use the Line Style property to specify the type of line you wish to use for the border; solid, dotted etc.
  - **Width** - The Border Width property sets the thickness of the border line, in pixels. If you do not want the border line to be displayed, set the width to 0 or leave it blank.

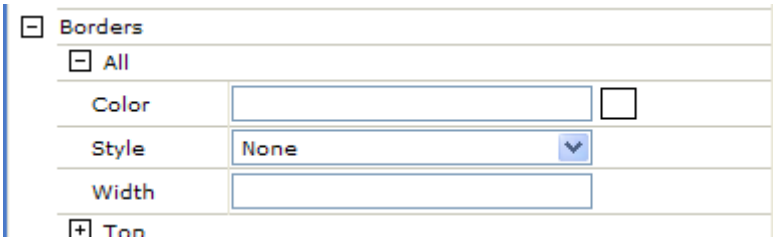


Figure 99 The Borders > All properties expanded

HTML Style Properties > Lists Tab

The properties on this tab set the details for text in the selected object.

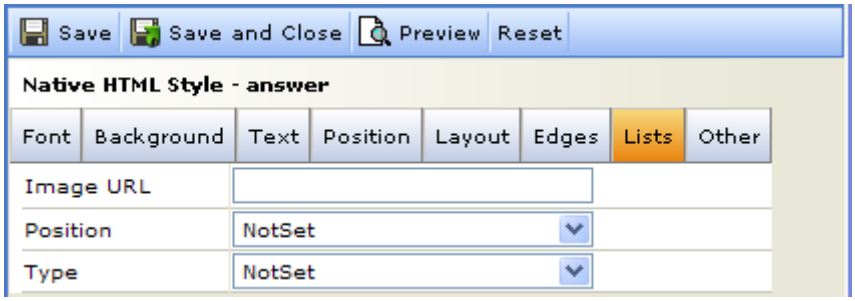


Figure 100 The HTML Style Properties > Lists tab

- **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:
  - **NotSet**
  - **Inside** - the list-item marker image is positioned inside the object and any wrapping text is aligned under the marker.
  - **Outside** - (Default) 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.

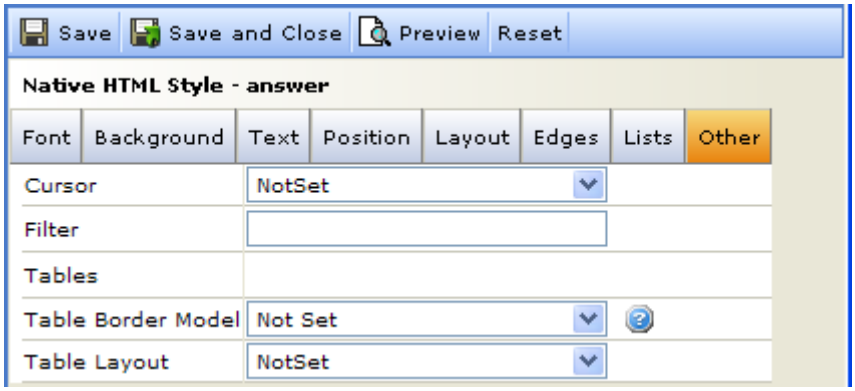


Figure 101 The HTML Style Properties > Other tab

- **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.
  - **Not Set**
  - **Collapse** - borders are collapsed into a single border when possible..
  - **Separate** - borders are detached.
- **Table Layout** - specifies whether the table layout is fixed or automatic. The options are:

- **NotSet**
- **Auto** - the column width is set by the widest unbreakable content in the column cells.
- **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%.

4.10.3.5. 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**.

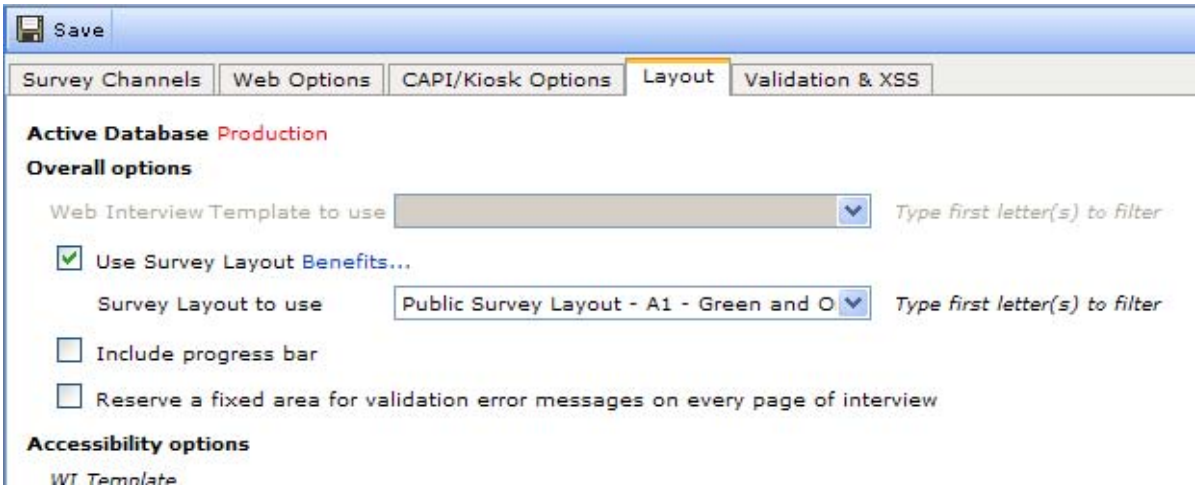


Figure 102 Apply a Survey Layout to a survey

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.

4.10.3.6. 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, we will use the Page Layout setting of the "Age and Gender" Page object. Assume we wish to display the Age and Gender questions slightly differently based on respondent's region.

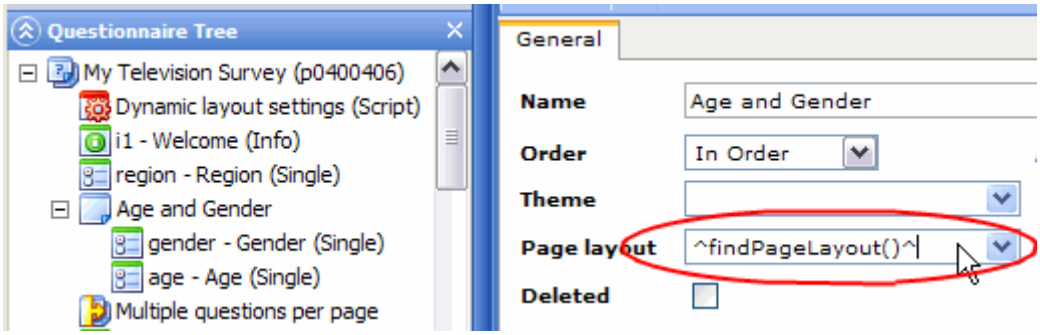


Figure 103 Setting up a dynamic survey layout

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.

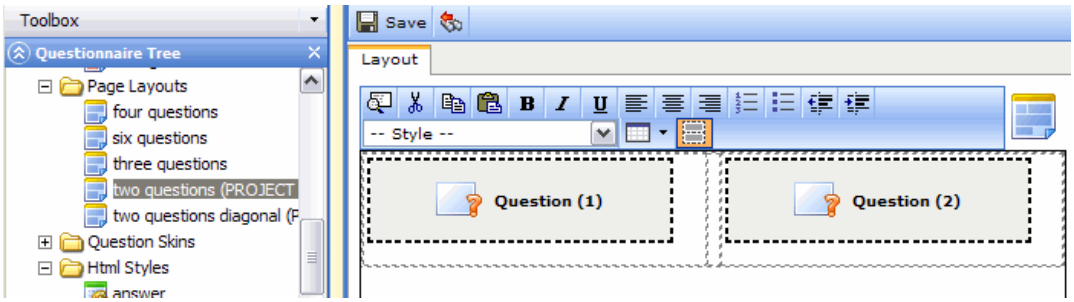


Figure 104 The "two questions" page layout

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.

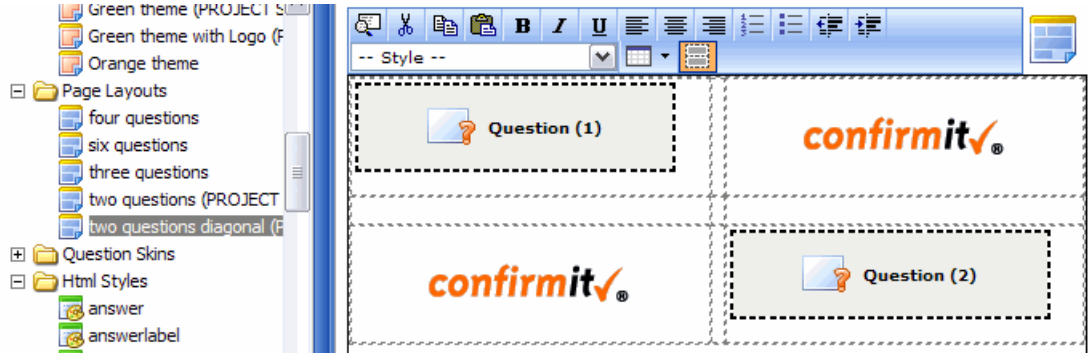


Figure 105 The "two questions diagonal" page layout

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

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

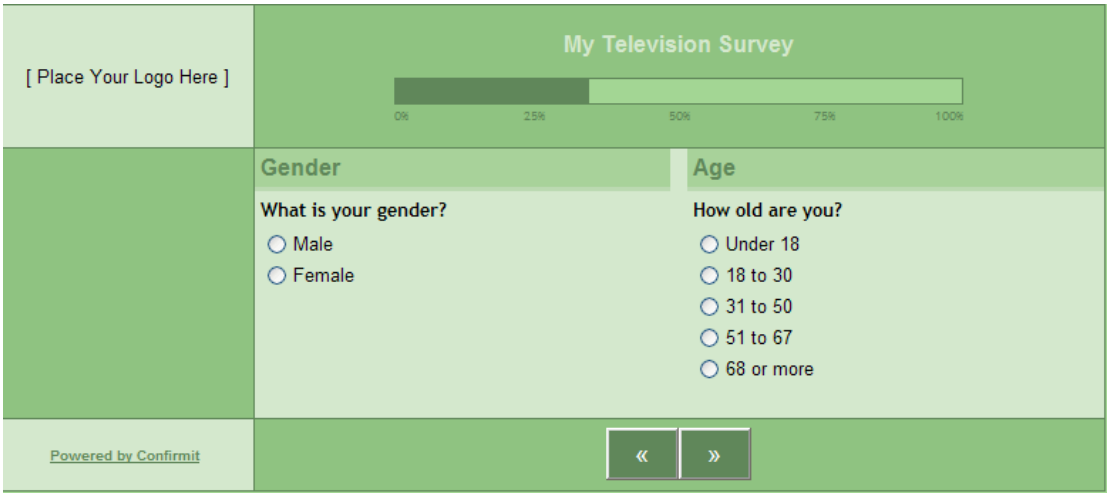


Figure 106 Gender and Age for Non-Europeans

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



Figure 107 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 random selections.

4.11. Templates

Access the Confirmit Templates via the **Home > Templates** drop-down menu.

Note: This functionality is not available in the Optimized database format.

This menu provides five options:

- Survey Layouts (go to Survey Layouts on page 40 for more information).
- Web Interview (WI) templates (go to Web Interview Templates on page 80 for more information).

- PowerPoint templates (go to MS PowerPoint Templates on page 87 for more information).
- Community Portal templates (go to Community Portals on page 88 for more information).
- Panel Templates (go to Panel Templates on page 87 for more information).

Note that Survey Layouts and WI Templates can also be accessed directly via the Quick Access pane on the left of the Confirmit window.

Confirmit templates are always bound to a specific client.

4.11.1. Web Interview Templates

Confirmit Web Interview (WI) Templates allow you to create a customized aesthetic layout that may be applied to your web interview surveys and published reports. This section focuses specifically on creating and managing WI Templates for web based surveys, including:

- Understanding the WI Template environment.
- Creating a template.
- Saving a template.
- Editing a template.
- Applying a template to a survey.

4.11.1.1. Understanding the WI Template Environment

To find the WI Template environment, proceed as follows:

1. Go to the **Home > Templates > WI** menu command.

   The WI Template environment opens as shown below.

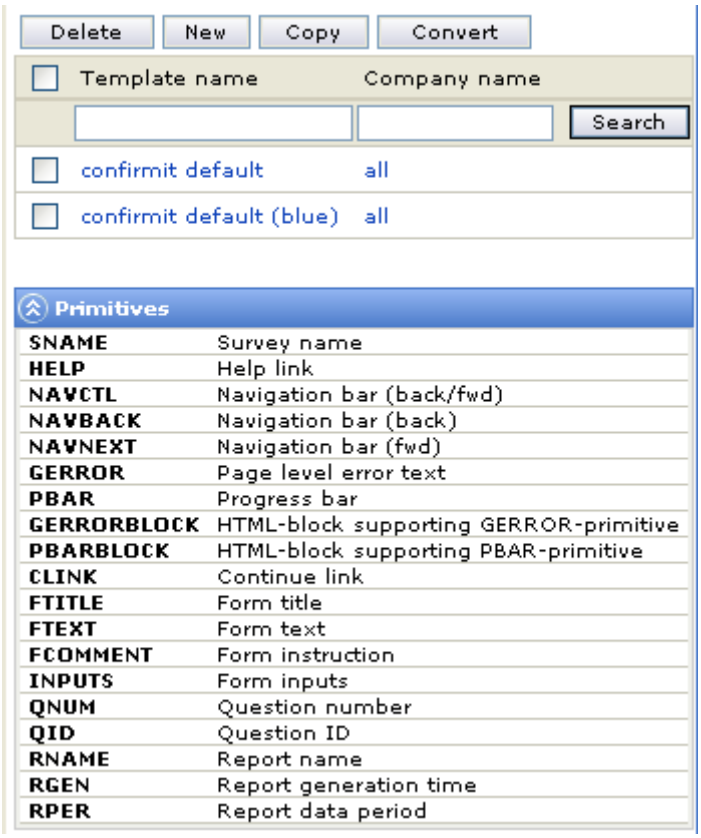


Figure 108 Example of the WI Template Editor

This primary screen includes the following:

- **Delete** – deletes existing WI Templates. You can only delete templates you have permission to delete.
- **New** – creates a new blank WI Template
- **Copy** – copies an existing WI Template
- **Convert** – convert template to Survey layout
- **Template Name (Column)** – lists existing WI templates; template names appear as hyperlinks, making the editing environment easily accessible via the click of the template name.
- **Search** – searches the library for existing templates not readily visible in the Template Name column. Searches may be performed by typing in the template name, or parts of the template name.
- **Primitives** – field survey names or navigation functions that may be placed within the Web Interview design template, including the survey name, corporate logo, navigation buttons, etc.

4.11.1.1.1. More on Primitives:

There are several key fields called Primitives that may be included within the design of a WI Template that are used to either display specific text from within the survey or to allow for respondents to perform basic functions, such as navigating from page to page. These fields are used in conjunction with HTML coding, the primary WI Template design language.

The following list of Primitives may be used when creating a WI Template. When using Primitive fields, they must be prefixed and suffixed by a caret (^):

Primitive	Description
^SNAME^	Survey name. The Project titles from the Project Overview page will be used in the template.
^HELP^	Help link. If you have a URL defined in Project > Production > URL Setup > Help link, you insert this primitive in the template (for example Page footer) in order to have al link to the webpage.
^NAVCTL^	Navigation bar (back/fwd). Both navigation buttons will be displayed.
^NAVBACK^	Navigation bar (back). Backward button will be displayed.
^NAVNEXT^	Navigation bar (fwd). Forward button will be displayed. OK button will be placed where Next button is placed.
^GERROR^	Page level error message text.
^PBAR^	Progress bar
^GERRORBLOCK^	HTML-block supporting GERROR-primitive.
^PBARBLOCK^	HTML-block supporting PBAR-primitive
^CLINK^	Continue link. Use this primitive in the template when you have chosen the option: "Include a link that allows respondents to continue where they left off upon re-entry" in Generate WI Limited Survey Settings.
^FTITLE^	Form title. The title of the question will be included in the template. You can for example use this primitive in Information form header field and Data form header field.
^FTEXT^	Form text. The question text will be included in the template. You can use it for example in Information form body field or Data form body field.
^FCOMMENT^	Form instruction. The instruction text will be included in the template. You can use it in any field in the template.
^INPUTS^	Form inputs. Usually included in Data form body field. The check-boxes, radio buttons, and

	open text boxes will be displayed.
^QNUM^	Question number
^QID^	Question ID
^RNAME^	Report name
^RGEN^	Report generation time
^RPER^	Report data period

You will also be able to to pipe questionnaire text into WI by using Confirmit/Jscript functions. This enables the usage of such data as for example background variables "logo" or "bgcolor" in templates, in order to differentiate layout for respondents.

This means that you can use all the standard Confirmit functions, for example, f("qID") etc., inside hats in the WI templates, as well as custom functions you define in script nodes. This is similar to using functions inside hats in question titles, texts, instructions, answer lists and scales in Confirmit questionnaires.

It will not be possible to preview these elements in the WI template designer. The template must be applied to a survey first.

Below are some examples of where and how you can use this functionality:

- In the page header / footer of the WI template, you may include ^showMyProgressBar()^. Then write a custom function showMyProgressBar() in a script node of the survey that shows *any* type of custom progress bar.
- Show the name of the respondent on every page of the survey, without having to add information nodes on each page.
- Change headers/images between different screens of the survey, without using information nodes, for example, ^showMyCustomHeaderImage()^ , ^showRandomJoke()^.

4.11.1.2. Creating a New Template

To create a new Template:

1. Go to the **Home > Templates > WI Templates** menu command or click **WI Templates** in the Quick Access pane.

   The WI Template page opens as shown below.

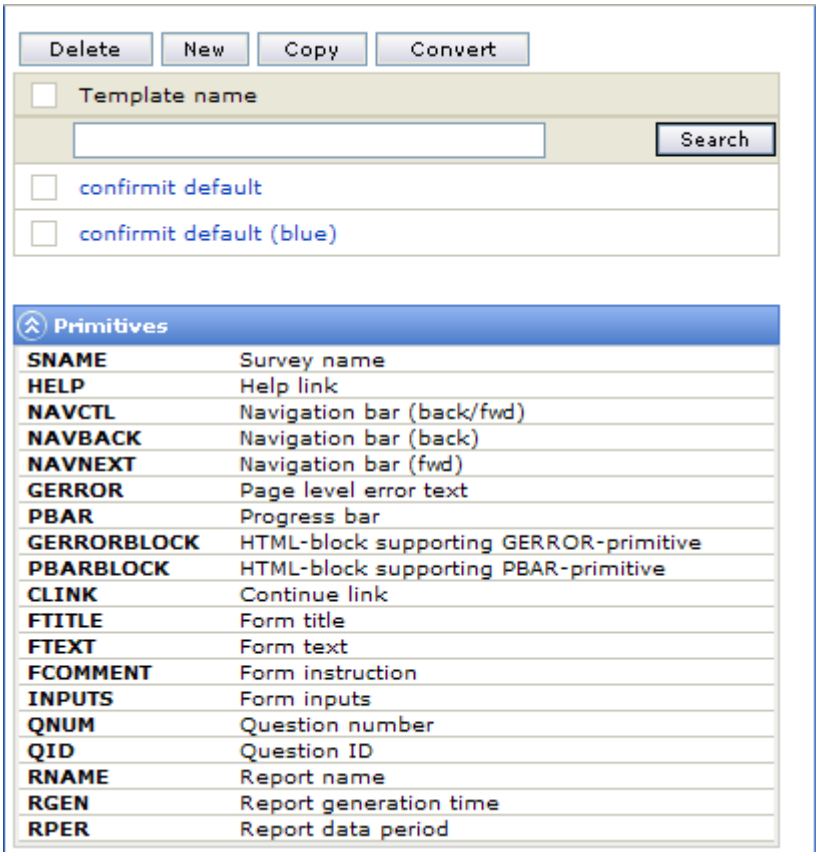


Figure 109 The WI Template page

2. In the WI Template page, click **New**.

   A new unnamed template file is added to the Template Name column and the editing window displays in the pane to the right.

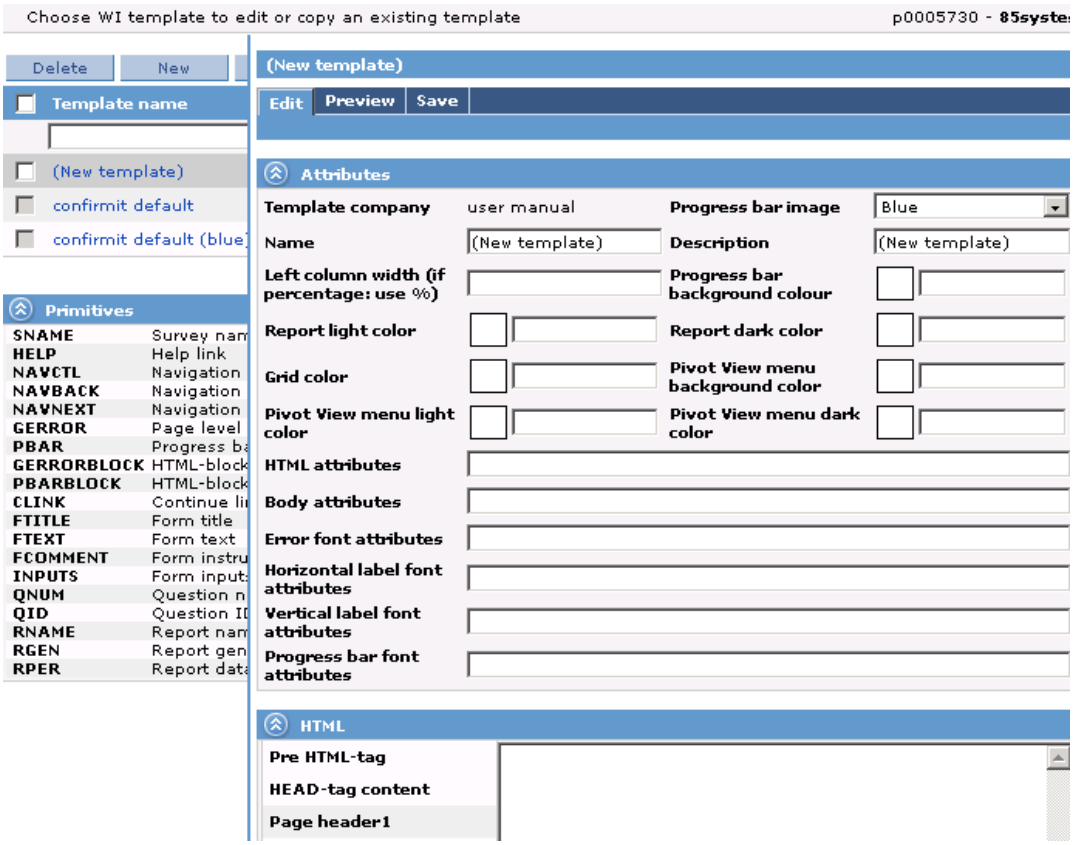


Figure 110 Creating a new template

For further information on editing the Attribute and HTML fields, see the following sections.

4.11.1.2.1. Editing Attribute Fields in the WI Template

Attribute fields include high-level design specifics, such as the name of the template, common font color and font sizing options etc. The WI Template editing screen includes the following attribute editing options:

- **Template Company** - the name of the company that created the template. This name is client, client-region, or client-department specific as determined in the Confirmit contract.
- **Name** - the name of the WI template.
- **Left Column Width** - the width specified for the left column in the reports, where the links to the report elements are shown. If not specified, the column width will wary from page to page.
- **Grid Color** - the color of the grid lines in a grid question.
- **HTML Attributes** - can be used to insert attributes in the HTML tag: for example, lang (language information), dir (text direction). For example enter lang="en" in the HTML tag to get <html lang="en"> (for English).
- **Body Attributes** - aesthetic attributes specific to the design of the entire WI page, including – background colors, background pictures, page margins, etc.
- **Error Font Attributes** - controls the font size and font color of the respondent-friendly error messages displayed during a survey. Max. 255 characters allowed.
- **Horizontal Label Font Attributes** - controls the font format of the ‘scale’ text in a grid question. Max. 255 characters allowed.
- **Vertical Label Font Attributes** - controls the font format of the ‘answer’ text for all questions. Max. 255 characters allowed.
- **Progress Bar Font Attributes** - specifies the aesthetic design, including font type and size, of the percentage numbers below the progress bar. Max. 255 characters allowed.

- **Progress Bar Image** - specifies the moving progress bar that displays the progress of the survey. Custom images can be referenced by including the following tag in the template field:

  <img src=" http://image_URL">

Note: When you run a survey from a secure site using SSL and your pages refer to images from non-secure sites, a warning to the respondent will be displayed on every page. To avoid this, the images must also be placed and referenced from a secure site. Confirmit offers an Image Storing Application as an additional service, and the ISA also allows for referencing to secure site as well.

- **Description -** the description of the template, if applicable.
- **Progress Bar Background Color -** specifies the background color of the progress bar.

4.11.1.2.2. Editing HTML Fields in the WI Template

Specific WI Template fields that require a lot of HTML coding are located in the lower section of the WI Template editor window:

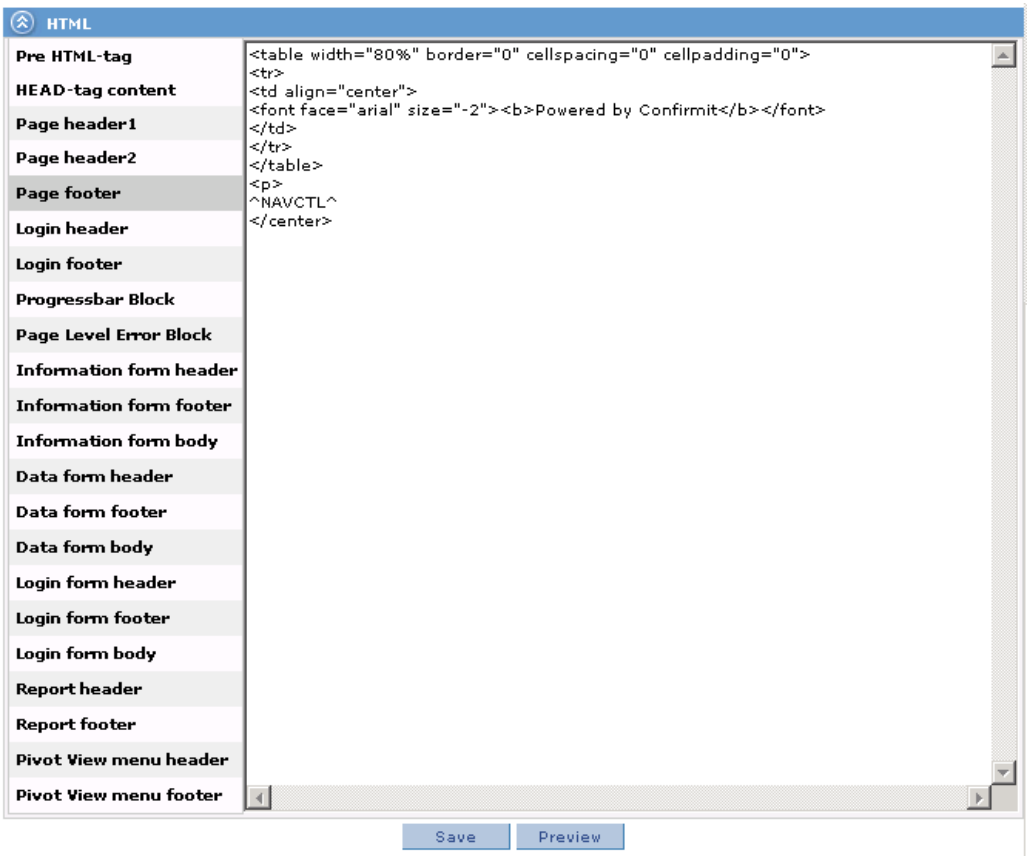


Figure 111 Editing HTML fields

To display an HTML editing field:

1. Click the HTML hyperlink field, for example Page Header.

   The editing window for the field is displayed.

2. Add or edit the HTML code as needed.
3. Click the **Save** button to save your changes.

Tip: Use <Alt>+Arrow up/down to move between the HTML editing fields.

The HTML editing fields are described in detail below:

- **Pre HTML-tag** - for code that is placed in front of the HTML tag.
- **HEAD-tag Content** - here you can include for example the title of the survey: <title>^SNAME^</title>

- **Page Header 1** - specifies the layout of the header section of the WI template, for example, the top section of the web interview pages can include the survey name and/or logo, and more. For example, the following primitives would be used: ^LOGO^, ^SNAME^, etc.
- **Page Header 2** - here you can include error messages and progress bar, for example ^GERRORBLOCK^
- **Page Footer** - specifies the layout of the footer section of the WI template, for example, the bottom section of the web interview pages can include the name of the company distributing the survey, back and forth navigation buttons, and more. For example, the following navigation control primitive would be used: ^NAVCTL^.
- **Login Header** - specifies the layout of the header section of the Login page for surveys where login page is generated.
- **Login Footer** - specifies the layout of the footer section of the Login page for surveys where login page is generated.
- **Progressbar Block** - the progress bar is set up with a primitive ^PBAR^ for the progress bar itself, a "progress bar block" to define the HTML around the progress bar, and a primitive ^PBARBLOCK^ which can be used to define where on the page this is to be placed.

  The progress bar block (and the progress bar itself) will only be included when the survey is generated with "include progress bar".

  It is also possible to use ^PBAR^ by itself if you do not want to include any surrounding HTML.
- **Page Level Error Block** - the top of page (general) error messages are set up with a primitive ^GERROR^ for the error message itself, a "page level error block" to define the HTML around the error message, and a primitive ^GERRORBLOCK^ that can be used to define where on the page this is to be placed.

  When the survey is generated with "Reserve a fixed area for error messages", the entire HTML is always included. If not, it is only included when an error message is to be displayed.

  It is also possible to use ^GERROR^ by itself if you do not want to include any surrounding HTML.
- **Information Form Header** - specifies the design of the upper part of an information form, both background color and text, (font size, color etc.), for example ^FTITLE^.
- **Information Form Footer** - specifies the area immediately under the information form (similar to the Page Footer).
- **Information Form Body** - specifies the design of the information form body, background color, text of the information form, and comments, for example ^FTEXT^, ^FCOMMENT^.
- **Data Form Header** - specifies the design of the upper part of an open, grid, single, multi question form, background color and text (font size, color, etc.), for example ^FTITLE^.
- **Data Form Footer** - specifies the area right under the question (similar to Page Footer).
- **Data Form Body** - specifies the designs of the body of the grid, single, multi question form; background color, text of the question (^FTEXT^), as well as comments (^FCOMMENT^) and answer alternatives (^INPUTS^).
- **Login Form Header** - specifies the design of the upper part of the login page. Note that once you enter code in one of the Login Form fields, the system generated default login page will be overwritten by this code.
- **Login Form Footer** - specifies the design of the bottom part of the login page. Note that once you enter code in one of the Login Form fields, the system generated default login page will be overwritten by this code.
- **Login Form Body** - specifies the design of the login page. Use the primitive ^INPUTS^ to include the boxes for userid/password. Note that once you enter code in one of the Login Form fields, the system generated default login page will be overwritten by this code.

4.11.1.2.3. Expanding and Collapsing Attribute and HTML Fields

Two editing sections are available within the WI Template editor screen; Attributes and HTML. The Attributes section fields are for more simplistic aesthetic editing, whereas the HTML section fields allow for more advanced HTML editing options. You may expand and collapse these sections by clicking on the appropriate section's header row.

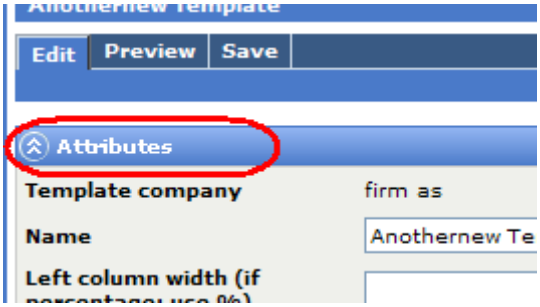


Figure 112 The expand/collapse button

4.11.1.2.4. Saving and Previewing Template Edits

To save changes to a template:

- Click the **Save** button above the Attributes area or below the HTML area to save the changes and remain in the Edit tab, or
- Go to the Preview tab. The changes will be saved automatically.

To preview changes to a template, click the **Preview** tab. On this tab you can also click the **Preview WI as Popup** button to open the preview of the WI template in a pop-up window. This will display a preview of the full HTML code when using style sheets or content in Pre HTML/Head HTML tags.

4.11.1.3. Published Report Templates

The following fields control the layout of Published Reports. No preview of these templates is currently available. To see the edited template, you must publish the report.

- **Report light color** - specifies the color of the collected data cells of the tables
- **Report dark color** - specifies the color of the header cells, label cells and aggregated data cells of the tables
- There are three parameters that are used only in report templates:
  - RNAME Report nameRGEN Report generation timeRPER Report data period

For more information visit http://extranet.confirmit.com/advice_and_guidance/layout/template/index.html

4.11.1.4. Pivot View Templates

The following five fields control the layout of published Pivot Views.

- **Pivot View menu background color** - specifies the color of the background of the left frame of the Pivot View.
- **Pivot View menu dark color** - specifies the color of the header cells and label cells of the Pivot View menu and the color of the grid lines in the Pivot View tables.
- **Pivot View menu light color** - specifies the color of the background of the Pivot View menu and the color of the cells in the Pivot View tables.

In fields for Pivot View light/dark color you must use RGB-codes (for example #ffffff) since they are converted from RGB-codes to codes that flash understands. Codes like "red", "blue", etc, cannot be converted.

Note: The primitives cannot be applied to Pivot Views.

4.11.2. MS PowerPoint Templates

Predefined MS PowerPoint templates may be uploaded to Confirmit. All templates uploaded are visible to Confirmit users within the same organization. A user may select from these templates when ordering MS PowerPoint presentations. Extension: .pot.

4.11.3. Panel Templates

Go to the Panelist Web Page section for further details.

4.12. 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 (go to Basic Panels on page 356 for more information).

4.12.1. 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 113 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.

4.12.2. 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.

To add a Community Portal to a Confirmit Panel:

1. Enter your Panel project in Confirmit.
2. Go to the **Panel Management > Community Portals** menu command.

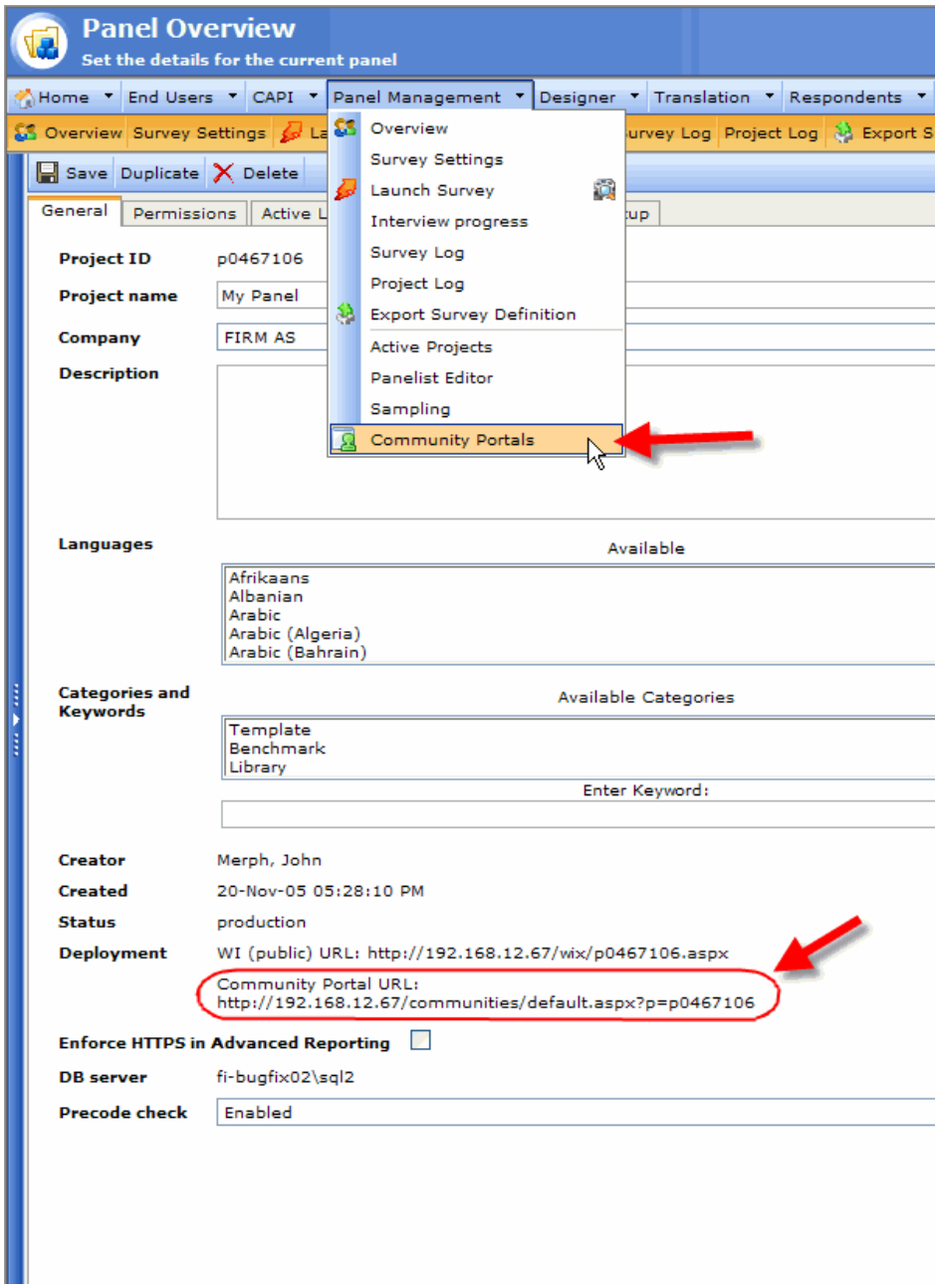


Figure 114 Activating a Community Portal

Note that the direct panelist link will be displayed under Panel Management together with the link to the panel registration survey.

4.12.2.1. 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.

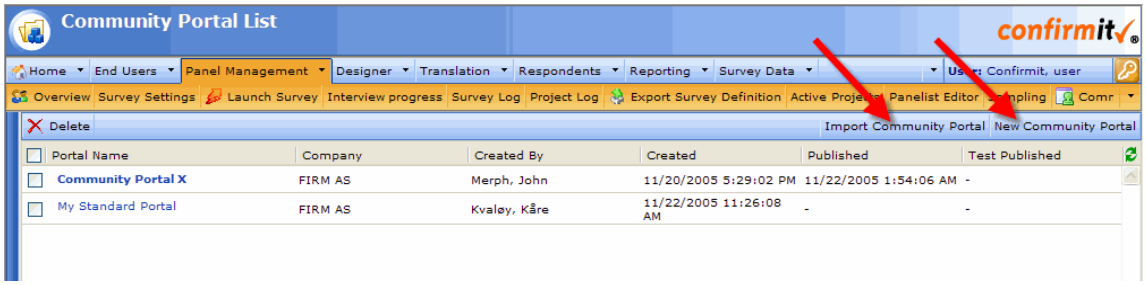


Figure 115 Example of a list of available Community Portals

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 click **Finish** on step 2, the Portal Designer will appear, holding 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 Portals** button.

4.12.2.2. Adding an Existing Community Portal Template to a Panel

From the list of available portals you have direct access to the Community Portals. Click on the name of a portal to go to the Portal Designer for that portal.

Click the arrow symbol to the right of the portal name (arrowed in the figure below) to open a drop-down menu. From here you can:

- Access the Portal Designer for the portal specified. Here you can change the portal, optimizing it for the current Panel.
- View the published version of that Portal as a panelist (View).
- Make a duplicate of the portal (Duplicate).
- Export the Community Portal to transfer it across to other Confirmit Installations or for offline storage (Export).

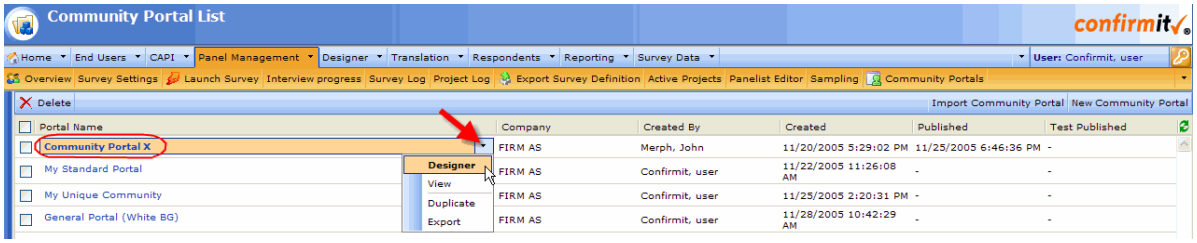


Figure 116 Accessing a Community Portal

4.12.3. Working with your Community Portal

The Portal Designer is where you create and make changes to your portal pages. The example uses a portal called “Community Portal X”. In this case a Page Master, three Themes, and five Pages have been added. In addition, there are six pages inside the folder (go to Folders on page 99 for more information).

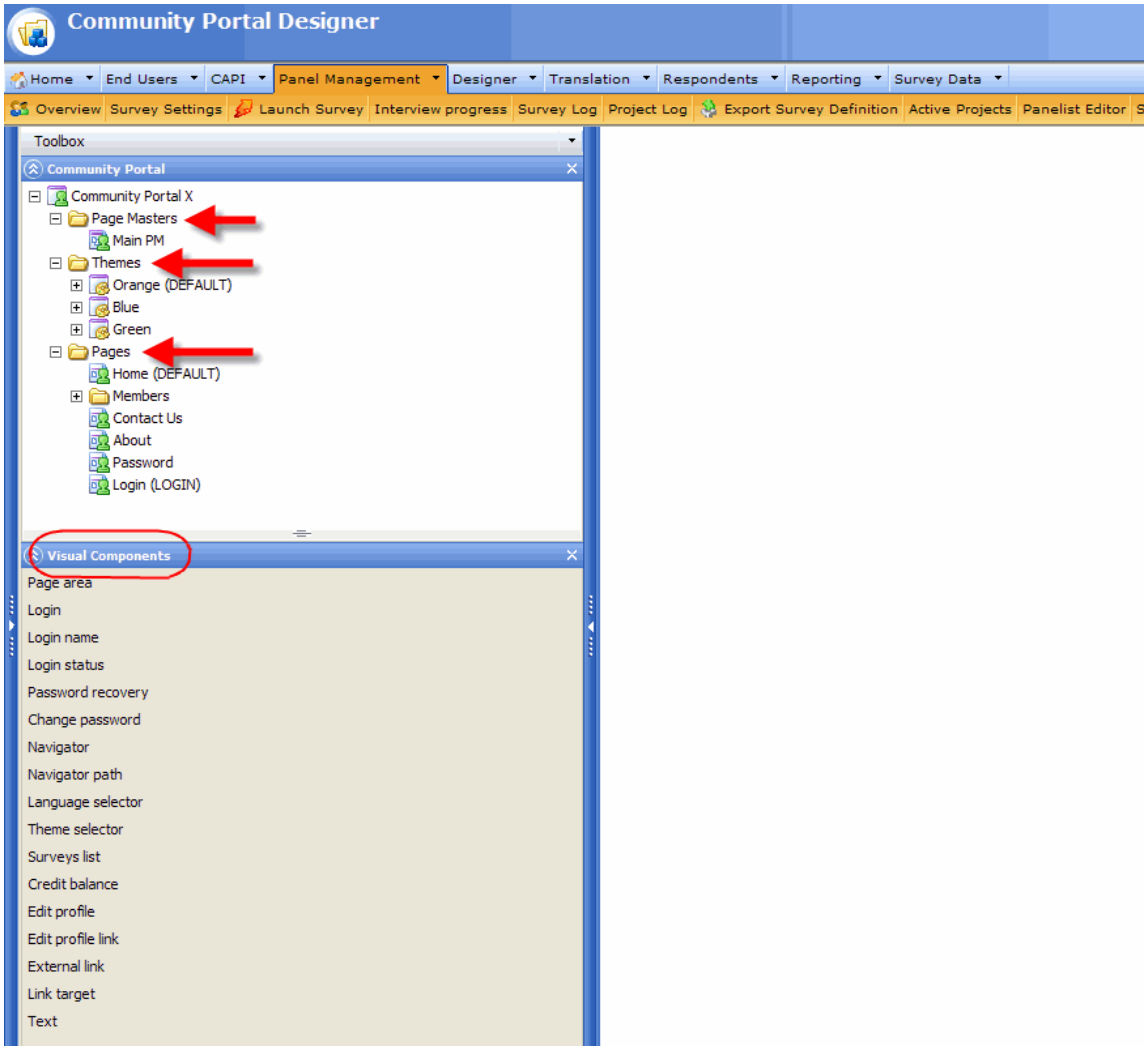


Figure 117 The toolboxes inside Portal Designer

The Portal Designer contains two toolboxes:

- The Community Portal toolbox holds all your Page Masters (go to Page Masters on page 91 for more information), Themes (go to Themes on page 92 for more information), and Pages (go to Pages on page 96 for more information).
- The Visual Components toolbox which contains the elements that you can use on a page(go to Visual Components on page 101 for more information).

4.12.3.1. 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.

4.12.3.1.1. 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**.

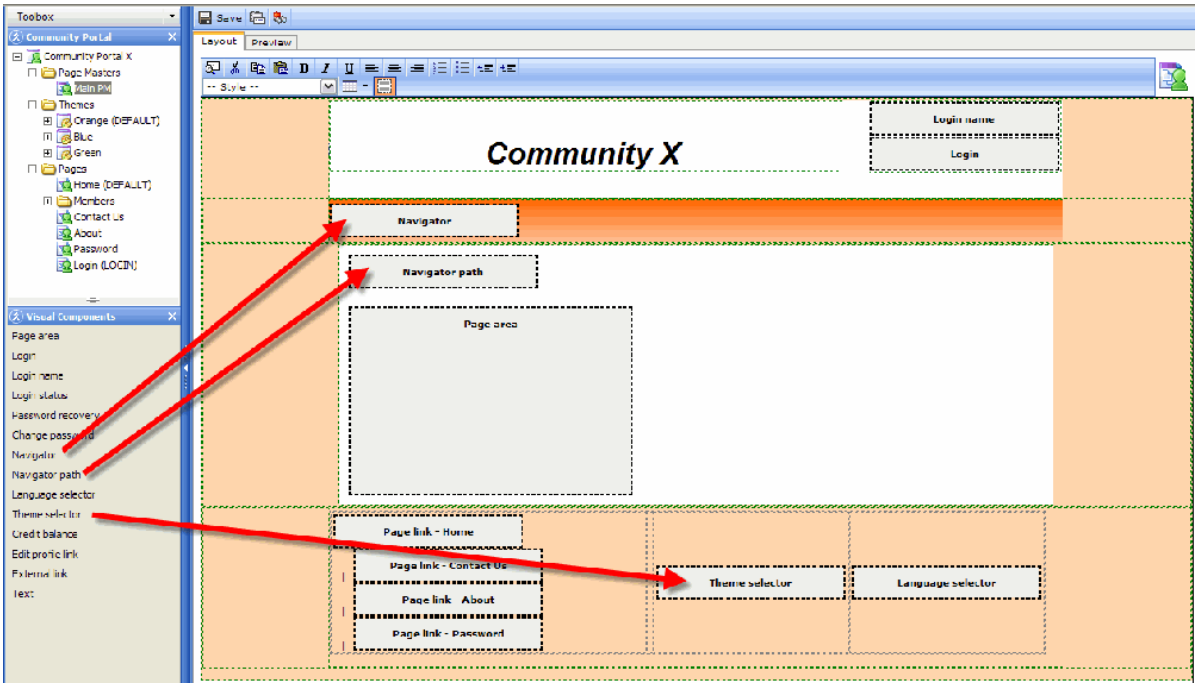


Figure 118 Editing a Page Master

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** (go to Visual Components on page 101 for more information).

You can use HTML tables, free-form text and images on your portal pages (go to Editing your Page Masters and Portal Pages on page 111 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.

4.12.3.2. 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 (go to Visual Components on page 101 for more information).

4.12.3.2.1. 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 assign any of these look-and-feel definitions.

To set a Style for a Visual Component:

1. Double-click the component (or right-click and choose **Properties**) as shown in the figure below.

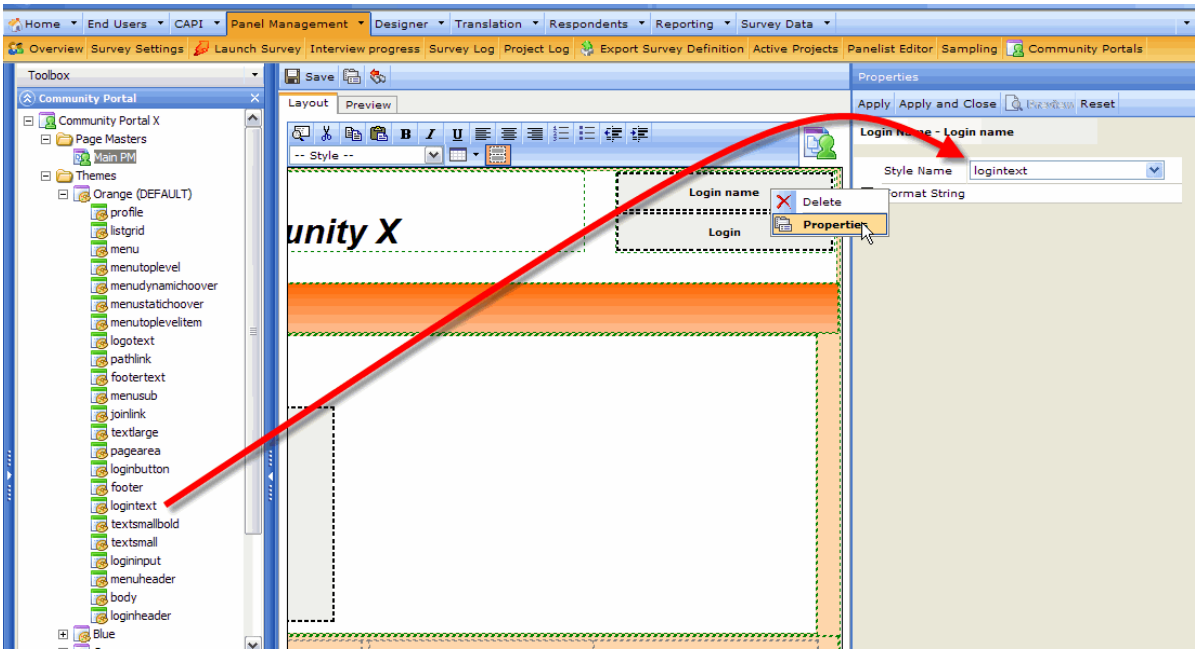


Figure 119 Applying a style for a Visual Component

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.

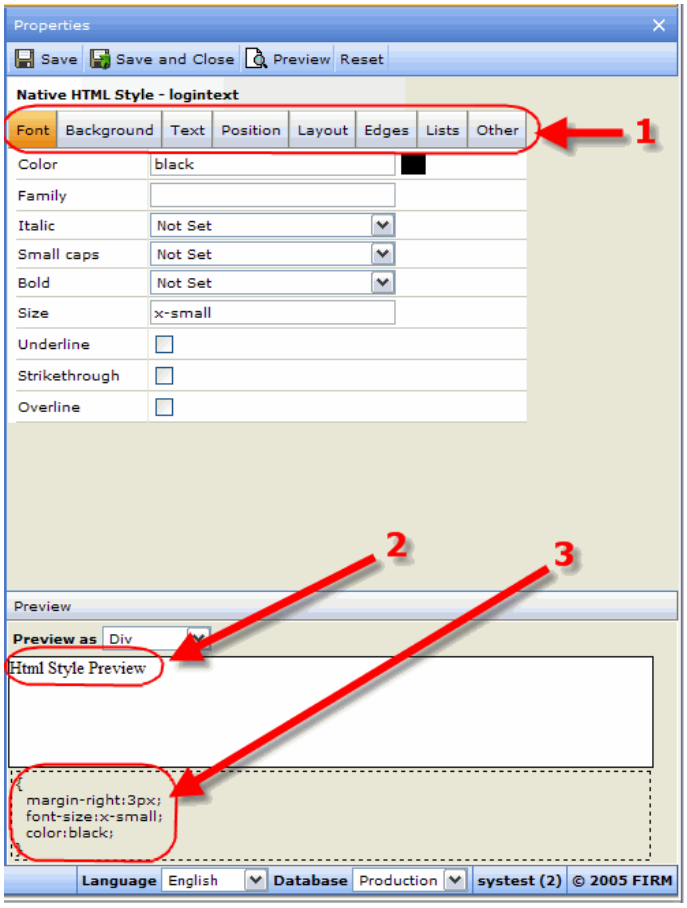


Figure 120 Working with Styles

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 do that you can see how each setting affects the style. Also, when making changes to a style, each alteration (setting) is listed below the preview so that you at all times know which settings have been set for that style (3) (go to Visual Components on page 101 for more information).

4.12.3.2.2. 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.

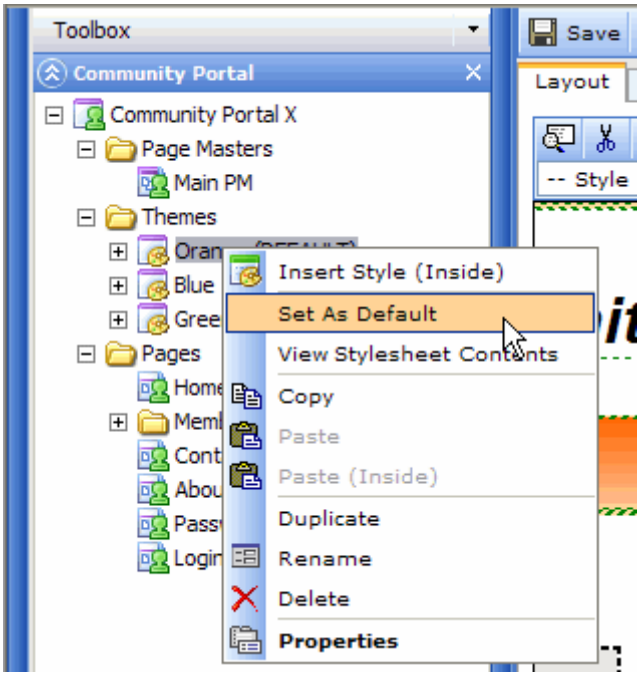


Figure 121 Setting a theme as Default

4.12.3.2.3. 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.

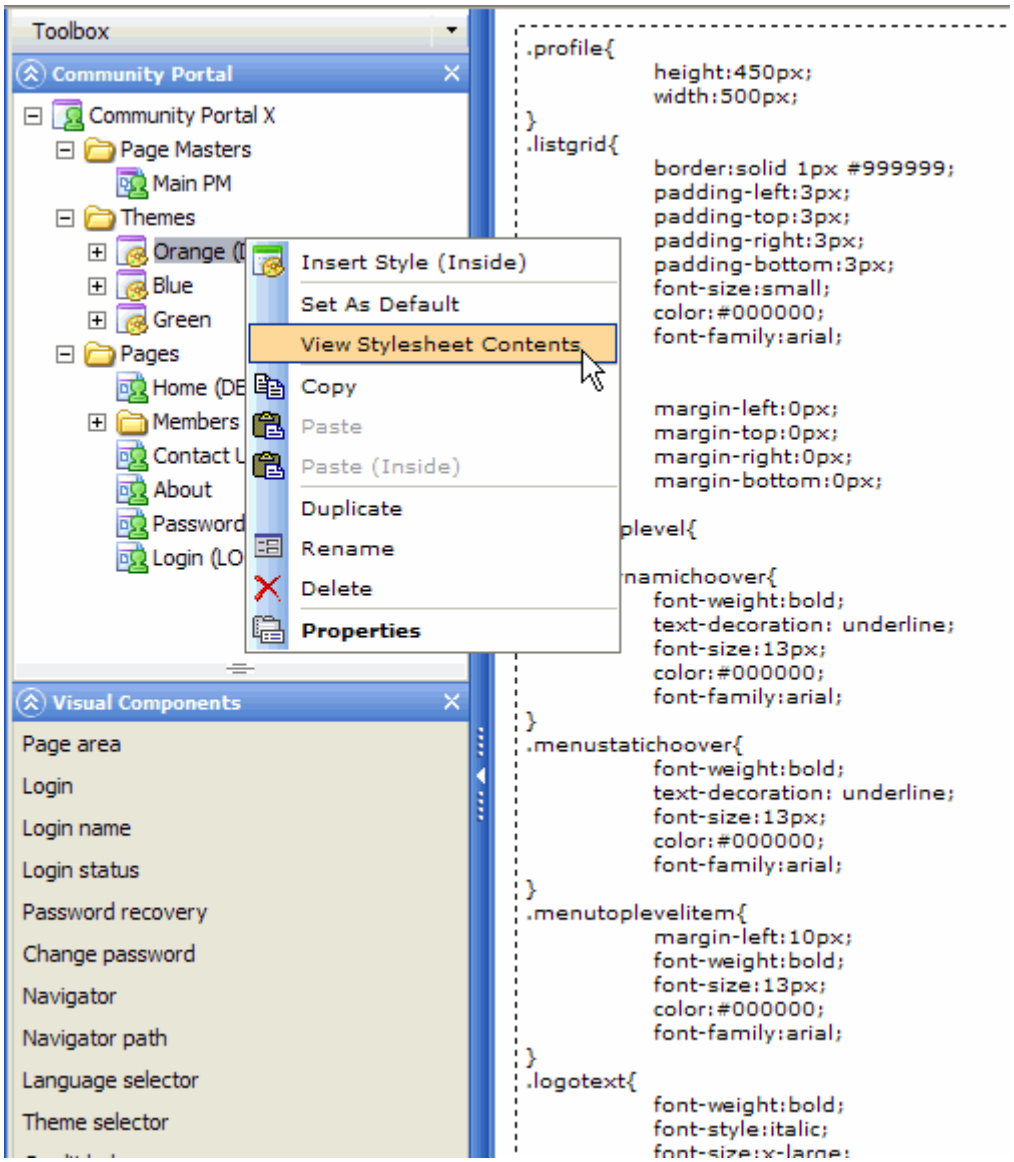


Figure 122 Selecting View Stylesheet Contents

4.12.3.3. 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 123 Previewing a portal page

To see the page set-up,click the **Layout** tab.

4.12.3.3.1. 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.

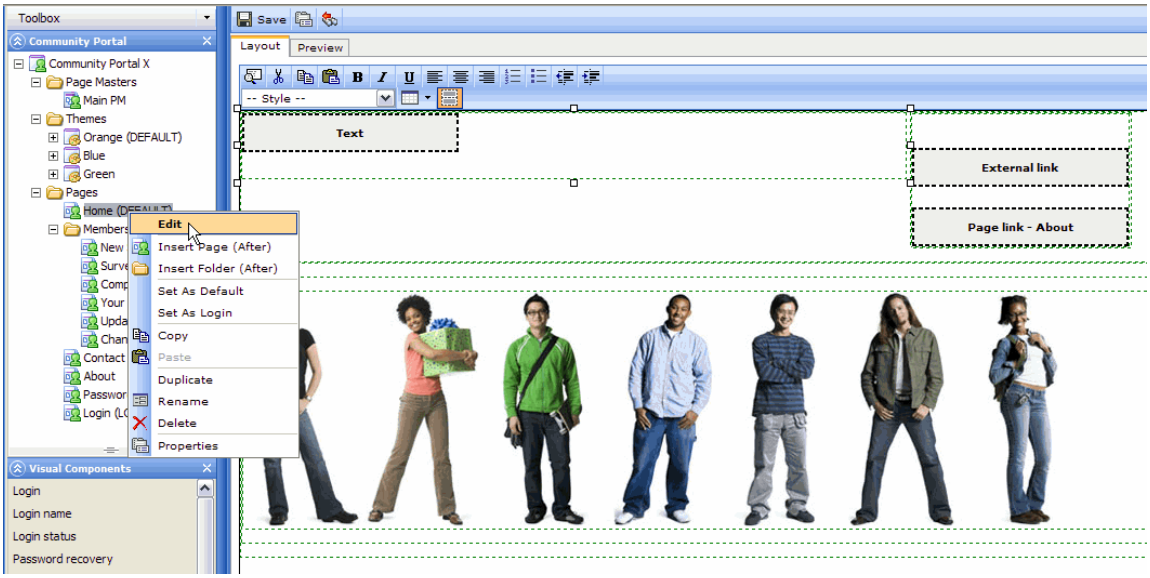


Figure 124 Editing a Page

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” (go to Page Masters on page 91 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 (go to Pages on page 96 for more information).

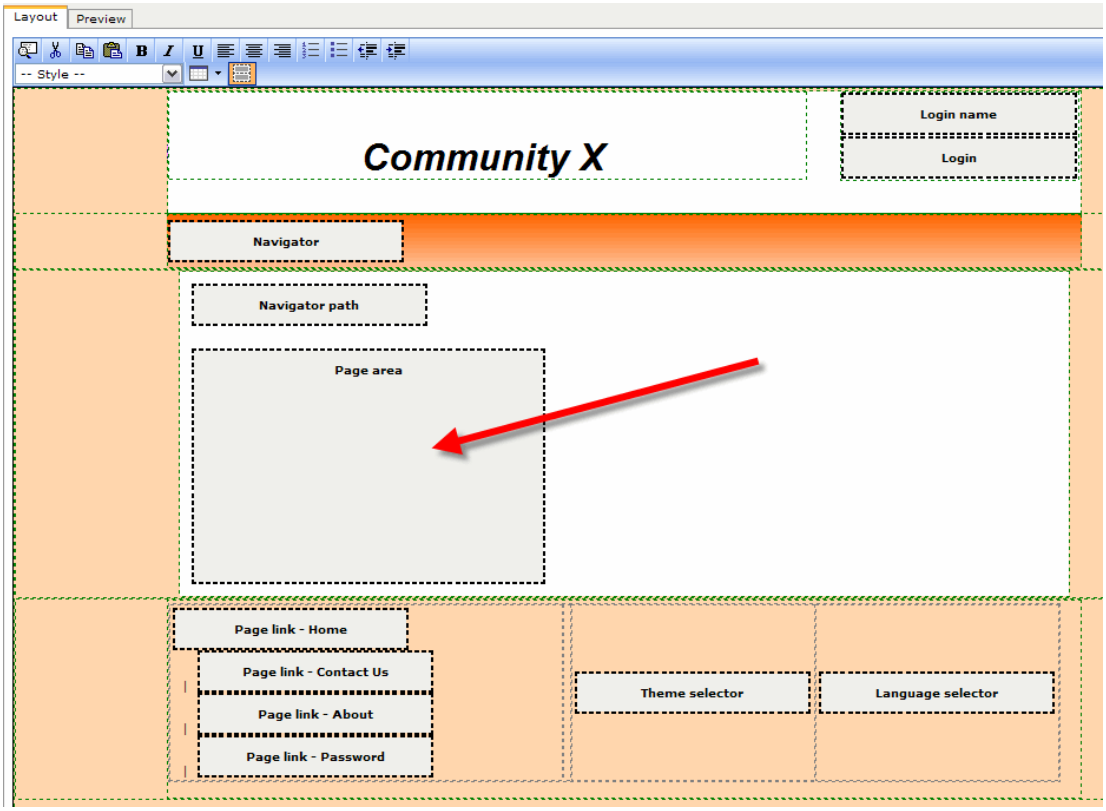


Figure 125 The location of the Page Area component

4.12.3.3.2. 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.

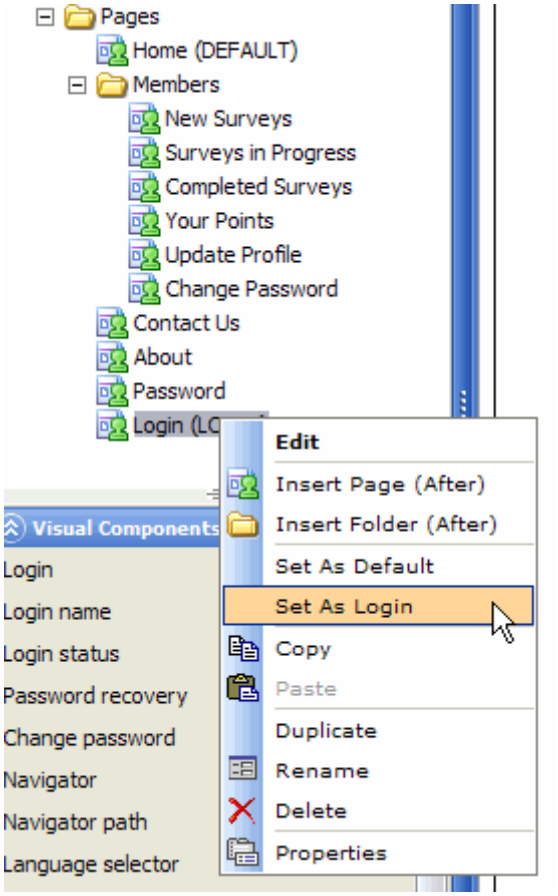


Figure 126 Selecting Set as Login

4.12.3.3.3. 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 127 Using Folders and pages to create menus and sub-menus for the respondent

4.12.3.3.4. Page Properties

To alter properties for a portal page, right-click on the page in the toolbox and choose **Properties** from the drop-down menu. The Page Properties page opens.

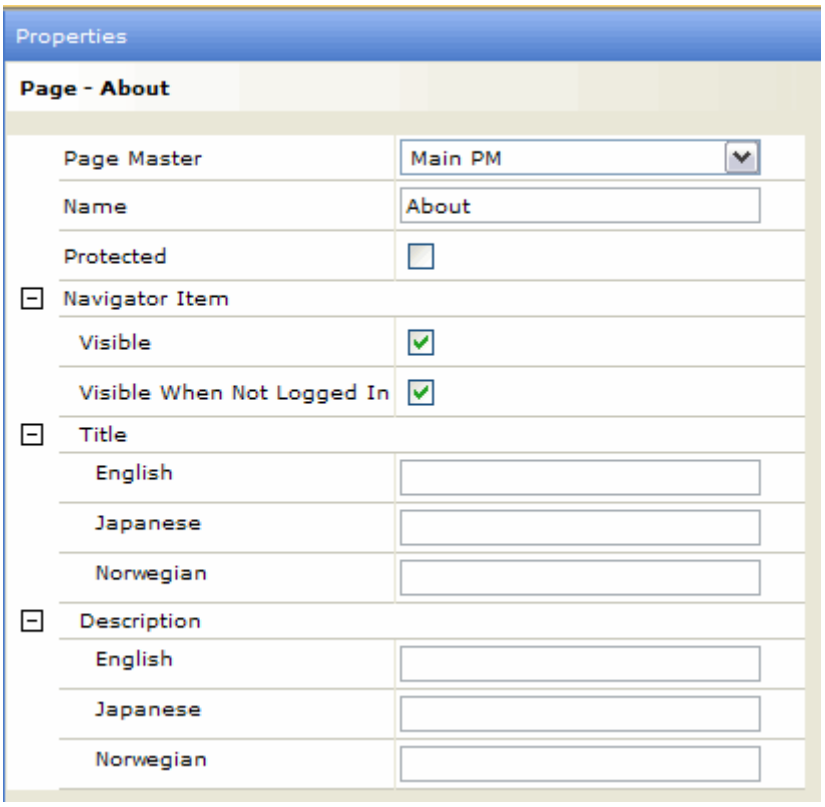


Figure 128 The Page Properties page

- To specify which **Page Master** is to be used for the page (go to Page Masters on page 91 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. If you check the **Visible** box, the page will be visible all the time. For pages you want to hide to all people not logged in, unselect the **Visible when not logged in** box. 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).

4.12.3.4. 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.

4.12.3.4.1. Page Area

The “Page Area” component determines where the page (portal page) is to be located on the overall page (Page Master) (go to Editing a Page on page 97 for more information).

4.12.3.4.2. Login

The Login element displays the username and password text-fields to the panelists. See the upper right hand corner of both images.

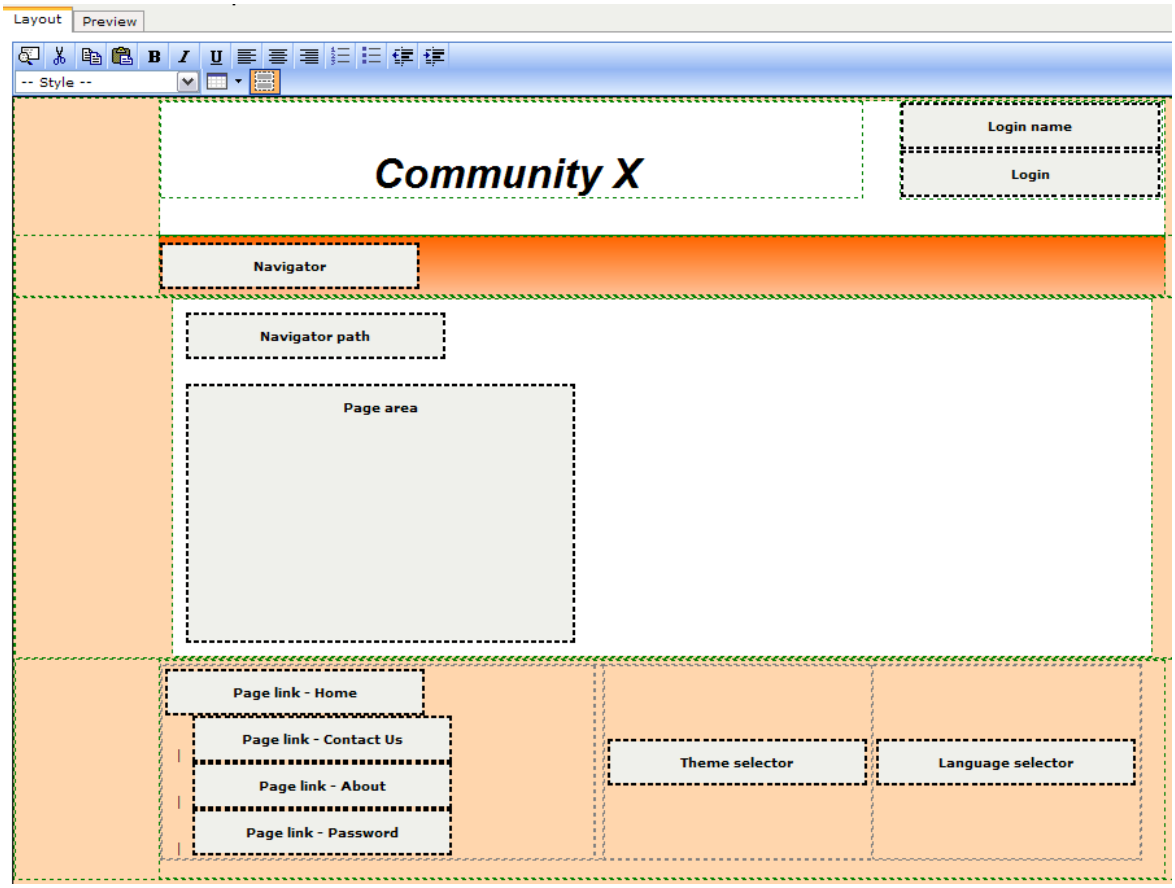


Figure 129 Example of a page layout



Figure 130 The page created by the layout above

4.12.3.4.3. 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.

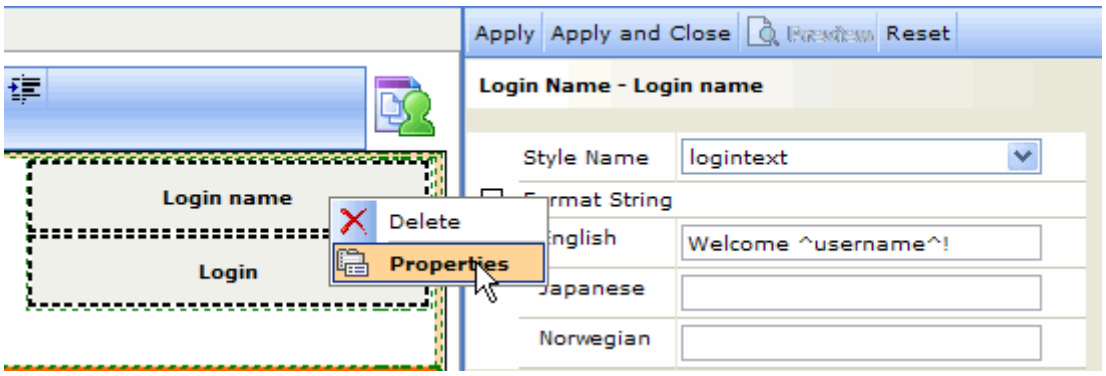


Figure 131 Setting the Login name properties

4.12.3.4.4. 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.

4.12.3.4.5. Password Recovery

This element provides a method for the panelist to ask for his or her password to be sent to his or her email address. This requires that the person has registered as a panelist before.

4.12.3.4.6. Change Password

This element allows the panelist to change his or her password at any time.

4.12.3.4.7. 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 132 Navigator and Navigator path

4.12.3.4.8. Language selector

The Language Selector element enables the panelists and other visitors to your portal to choose their portal language.

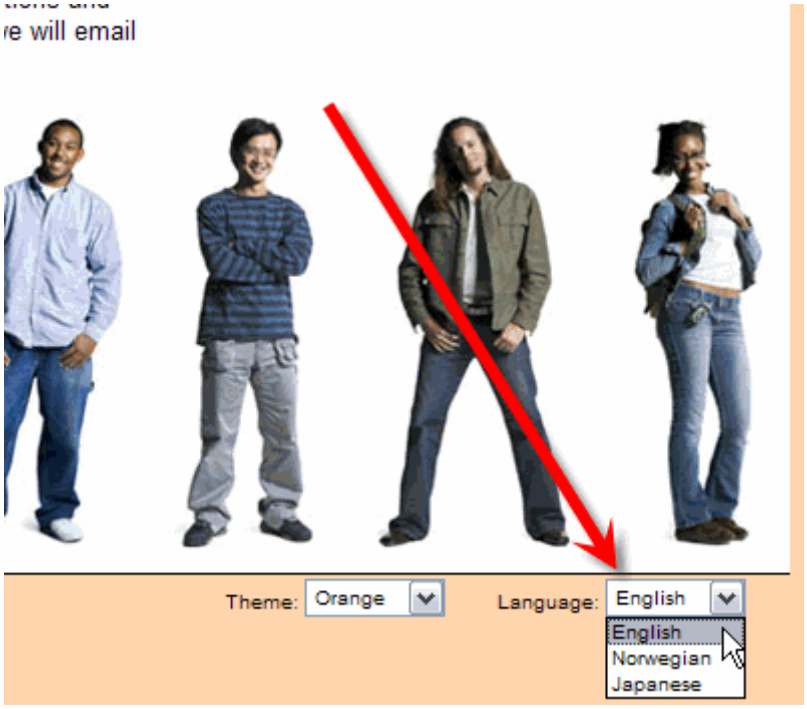


Figure 133 Example of the Language Selector element in use

4.12.3.4.9. 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 (go to Themes on page 92 for more information).

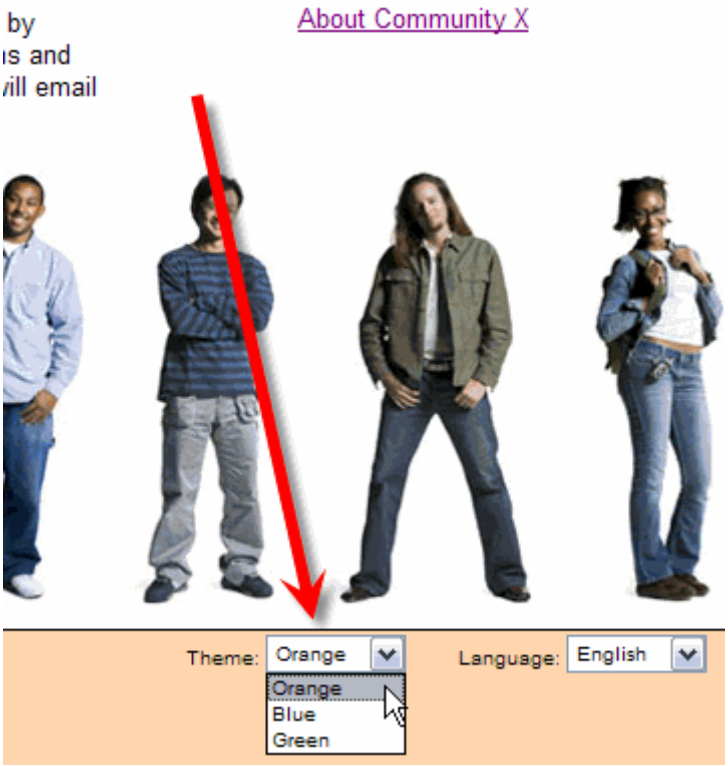


Figure 134 Example of the Theme selector in use

4.12.3.4.10. Credit balance

Confirmit keeps track of points earned for panelist participation. Use the “Credit balance” element to display the current amount 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 on your completed surveys.” The variable N will display the credit balance, starting at zero.

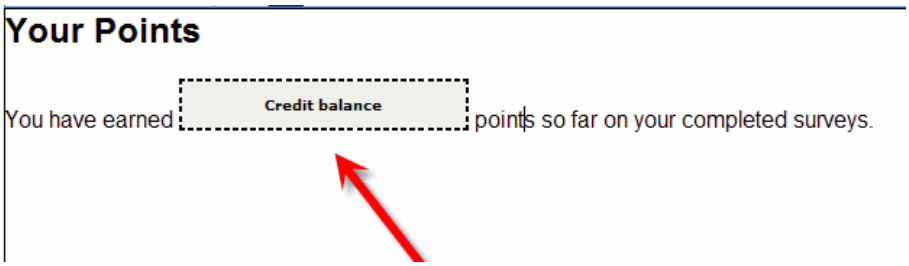


Figure 135 Example of using the Credit Balance element

4.12.3.4.11. 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 136 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” (go to Page Masters on page 91 for more information) so the portal page opens neatly inside the Community Portal look-and-feel.

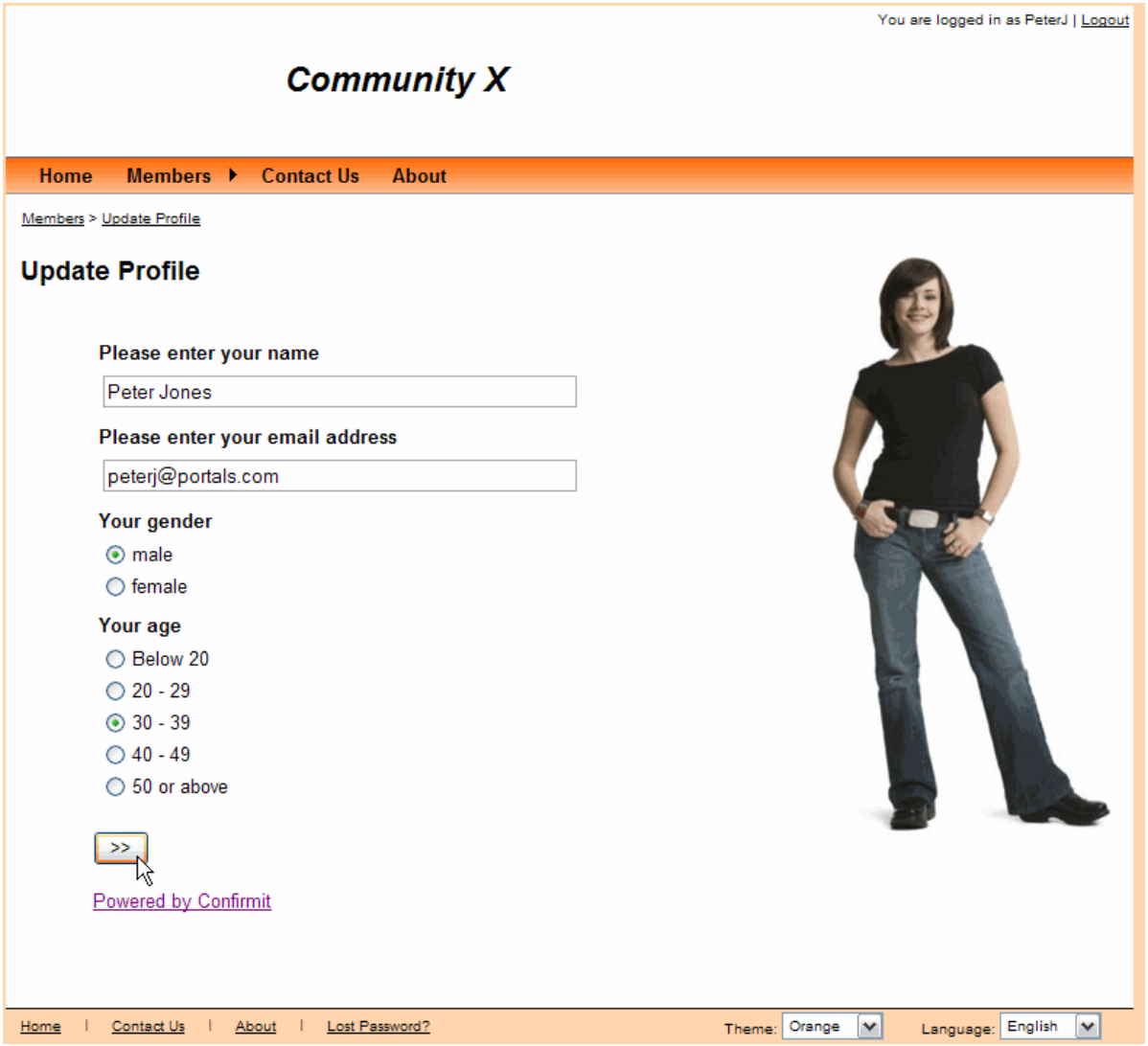


Figure 137 A respondent updates the panel survey (his profile)

4.12.3.4.12. 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.

4.12.3.4.13. Text

The Visual Element “Text” is used to display text on a portal page. You can enter text directly onto a page (go to Free-form Text on page 117 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 (go to Language selector on page 103 for more information)

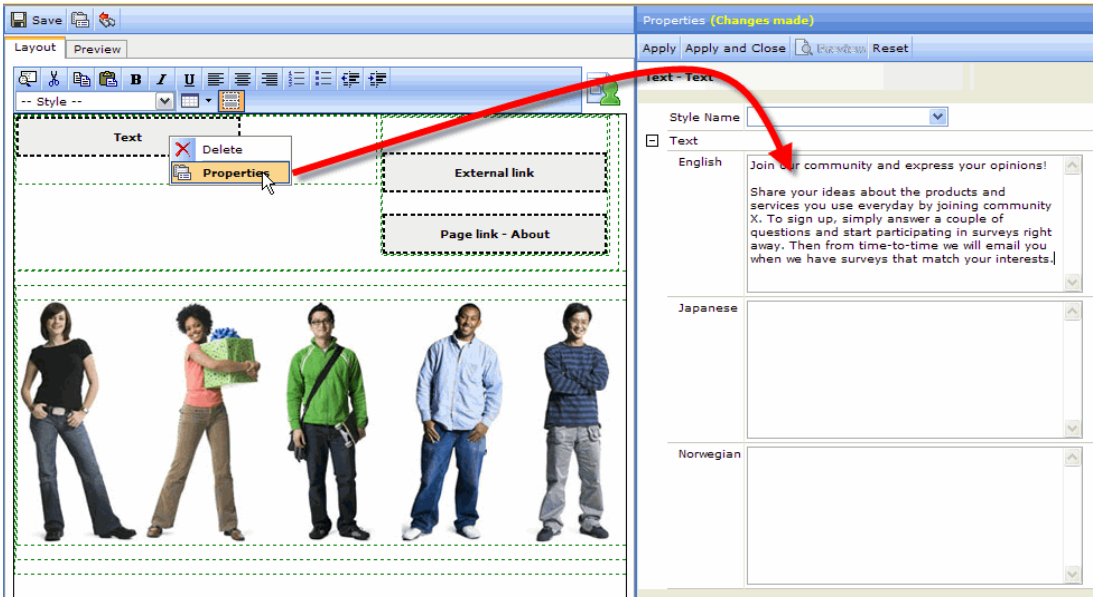


Figure 138 Language transparent text element

4.12.3.4.14. 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).

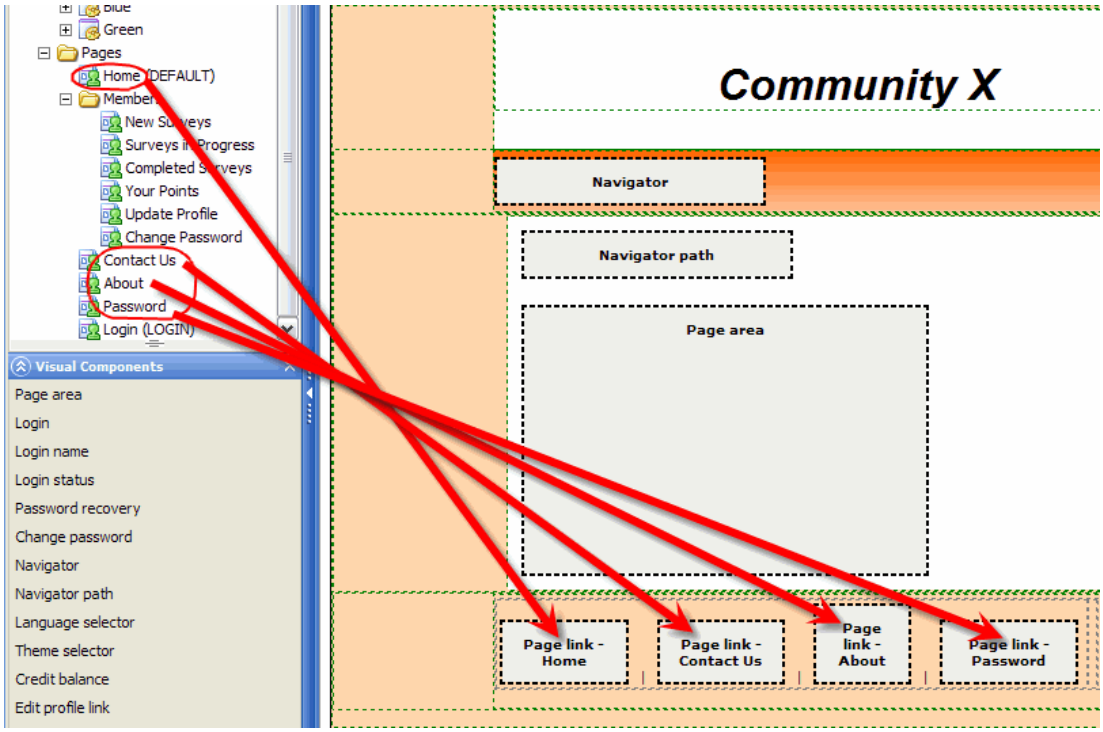


Figure 139 Example of Direct Page linking

4.12.3.5. Properties on a Community Portal

To set properties on the portal level, right-click the portal name, and choose **Properties**.

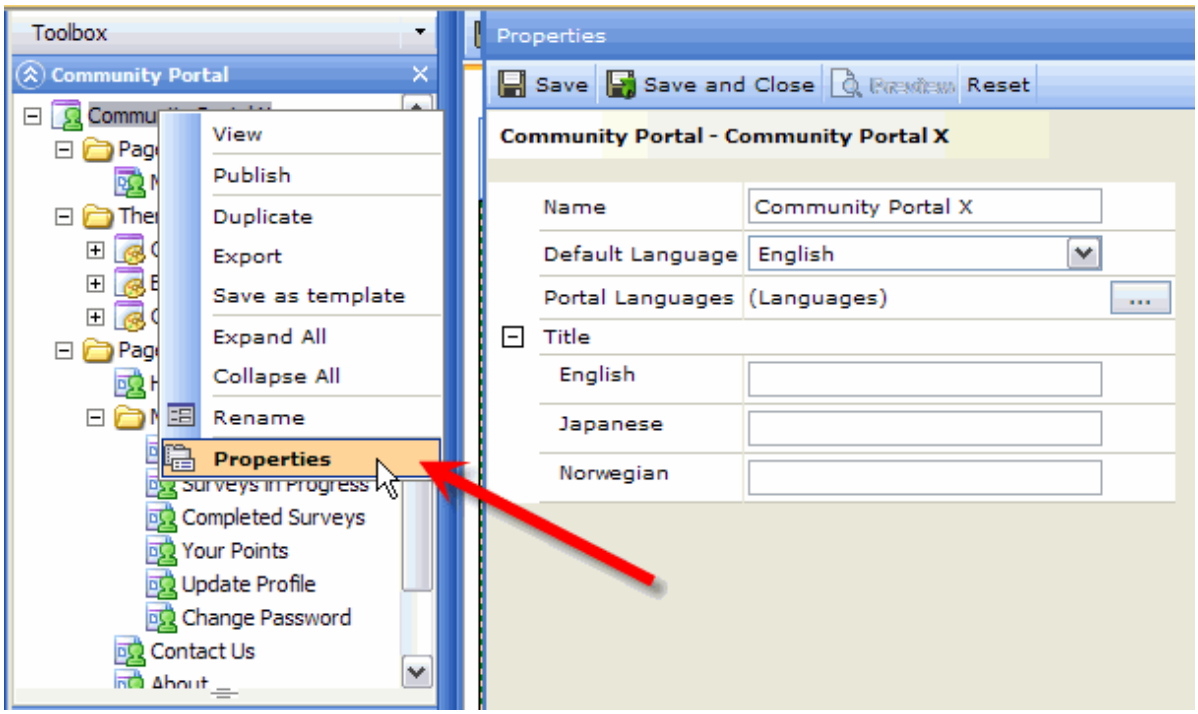


Figure 140 Properties on portal level

The portal **name** is displayed on top of the property sheet. In **Portal Languages** select the languages that are to be available to the panelists. In the example, English, Japanese, and Norwegian are selected. Use **Default Language** to specify which of the Portal Languages is to be the default language. This language will be used as the first-entry language, and whenever another language has not been chosen. In portal properties you can also state language-specific **titles**. These will be displayed to the panelists and other visitors.

4.12.4. 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.

4.12.4.1. 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, right-click on the portal name inside the Community Portal toolbox, and choose **Publish** from the drop-down menu.

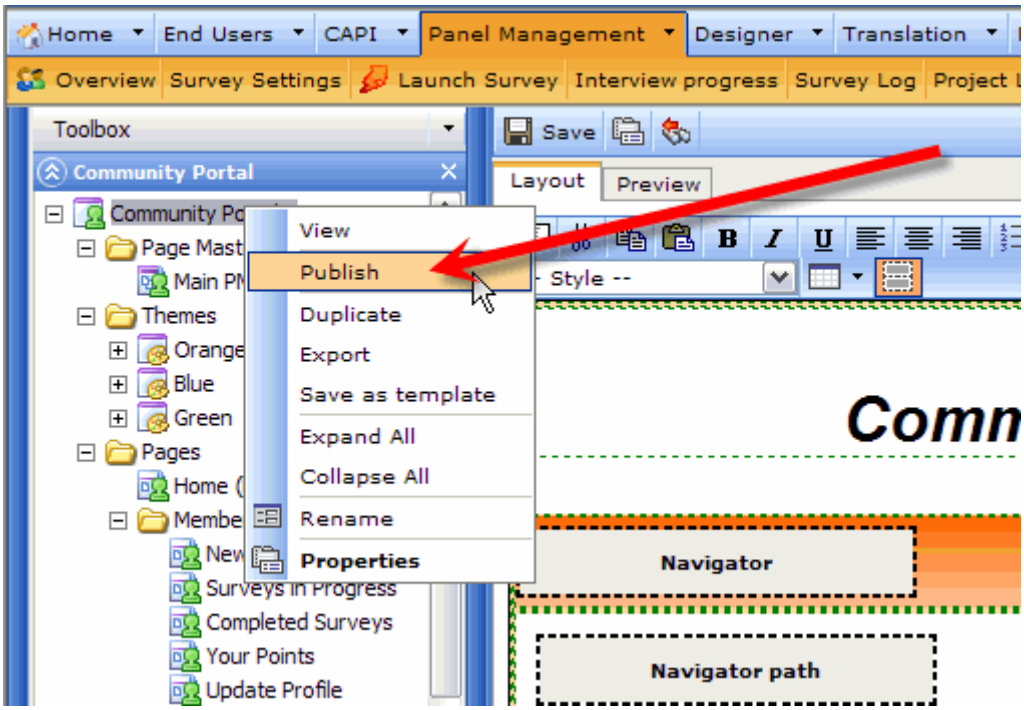


Figure 141 Publishing the portal

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 page/Overview). If another portal was published for the active panel, the new portal will override the old portal (as only one portal can be the published one at a time).

4.12.4.2. 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 Testing, and publish/test a portal using the test database.

4.12.4.3. 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.



Figure 142 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 this panel is listed in bold, and the time when the portal was last published (on Production database) is also shown. The “Test Published” column shows which portal was last published on the Test database.

4.12.4.4. 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 (go to Save as Template on page 110 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.

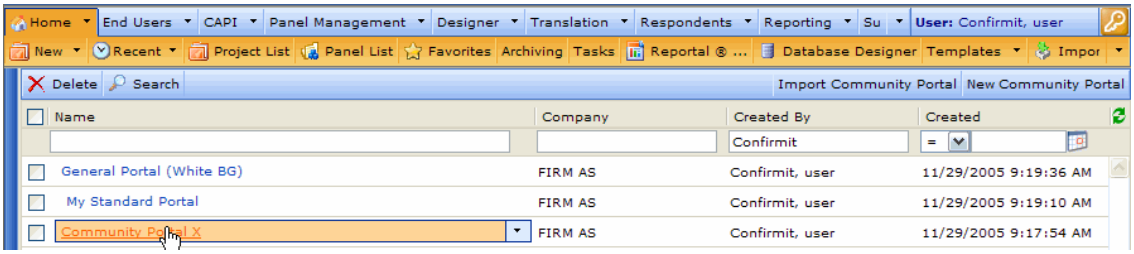


Figure 143 Example of the Community Portal template list

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.

4.12.4.4.1. 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**.

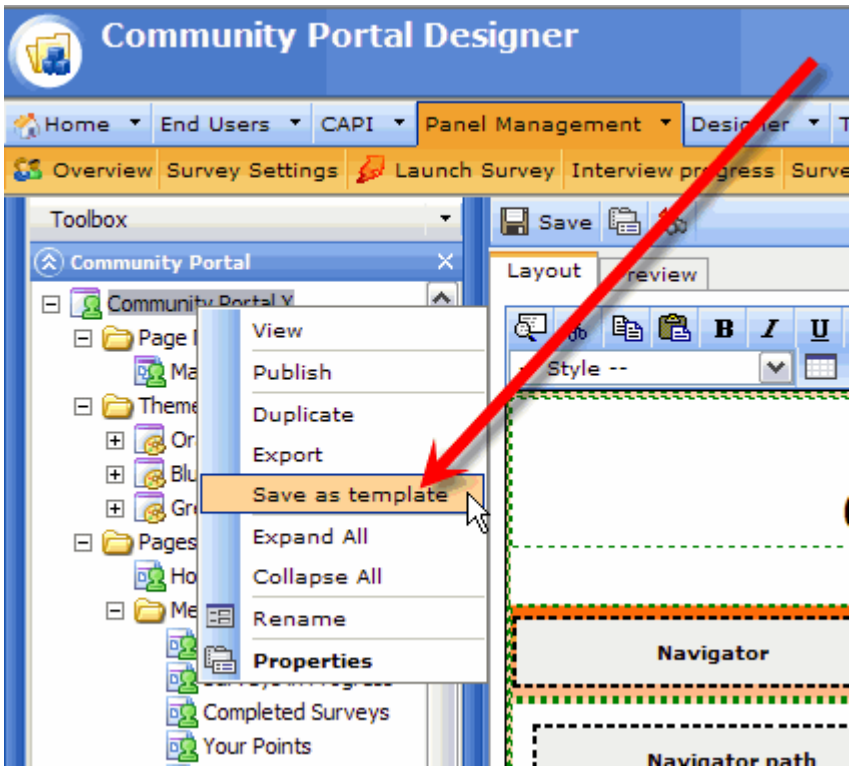


Figure 144 Saving a portal as a template

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.

4.12.5. 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) (go to Styles on page 92 for more information).

4.12.5.1. 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.

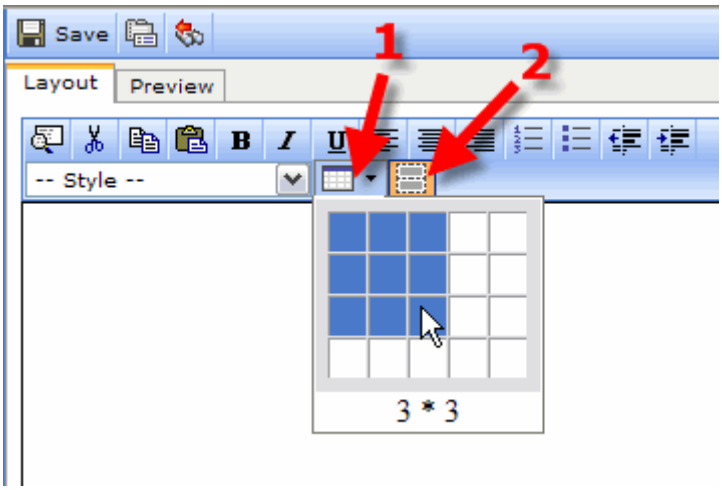


Figure 145 Creating an HTML Table

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).

4.12.5.2. 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.

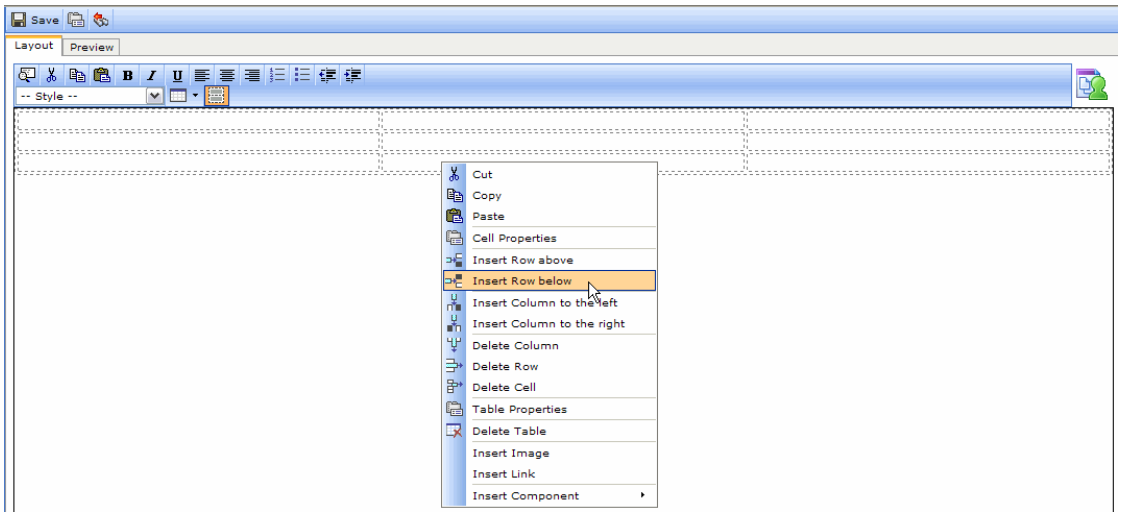


Figure 146 Adding rows and columns to a table

4.12.5.3. 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.

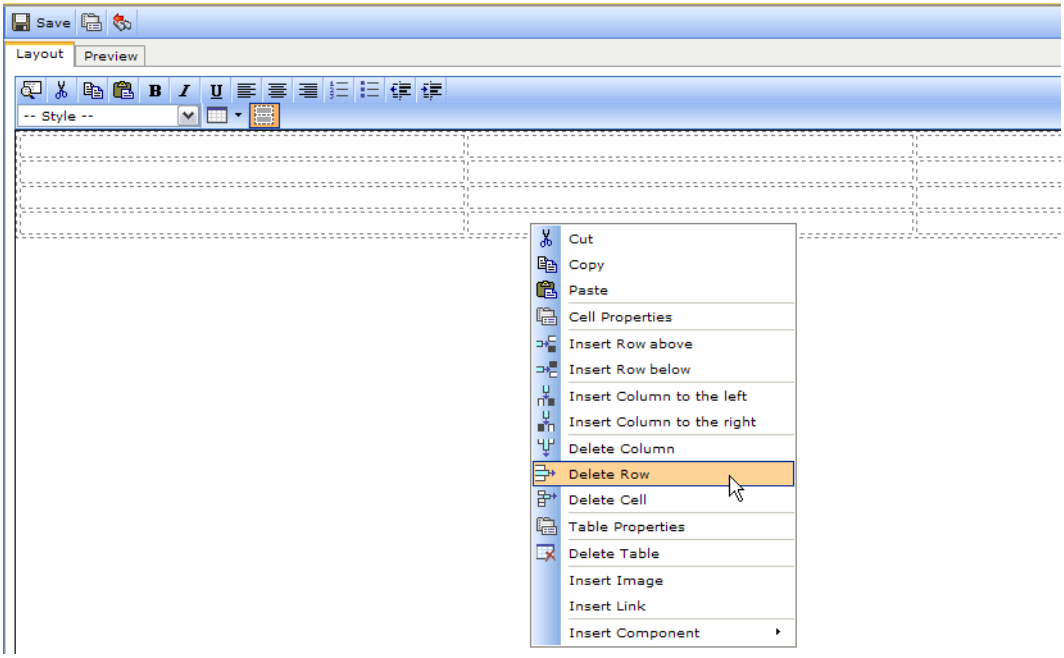


Figure 147 Deleting a cell, row or column

4.12.5.4. Table Properties

1. To open the Properties for a table, right-click anywhere in the table and select **Table Properties**.

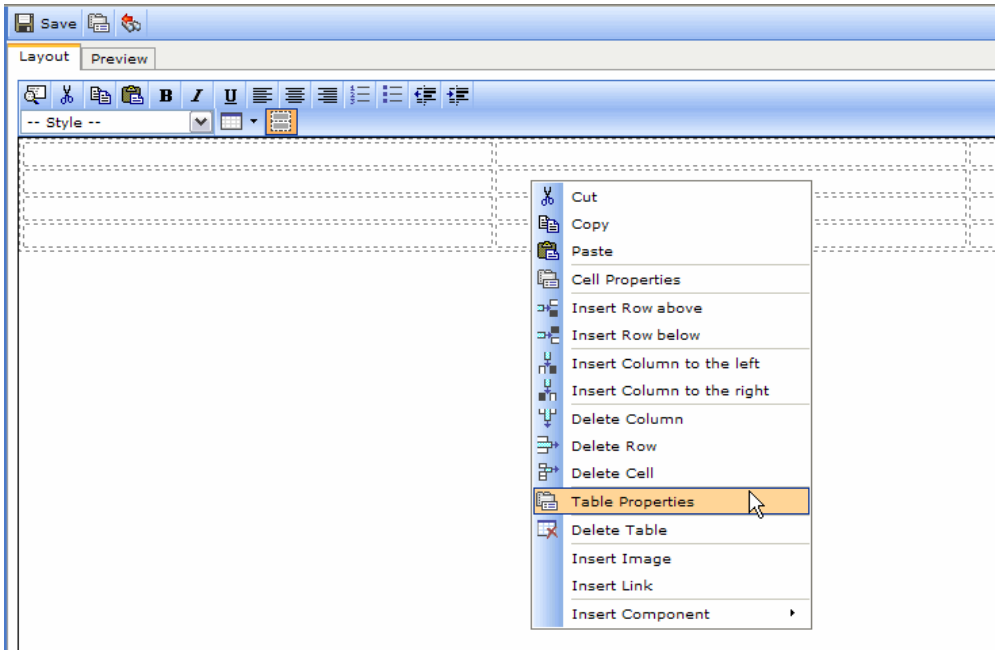


Figure 148 Opening the Table Properties window for a table

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**.

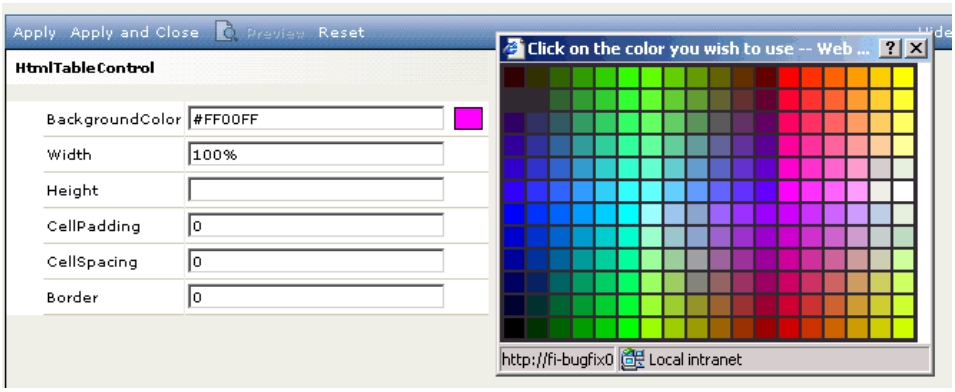


Figure 149 Editing the Background Color

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.

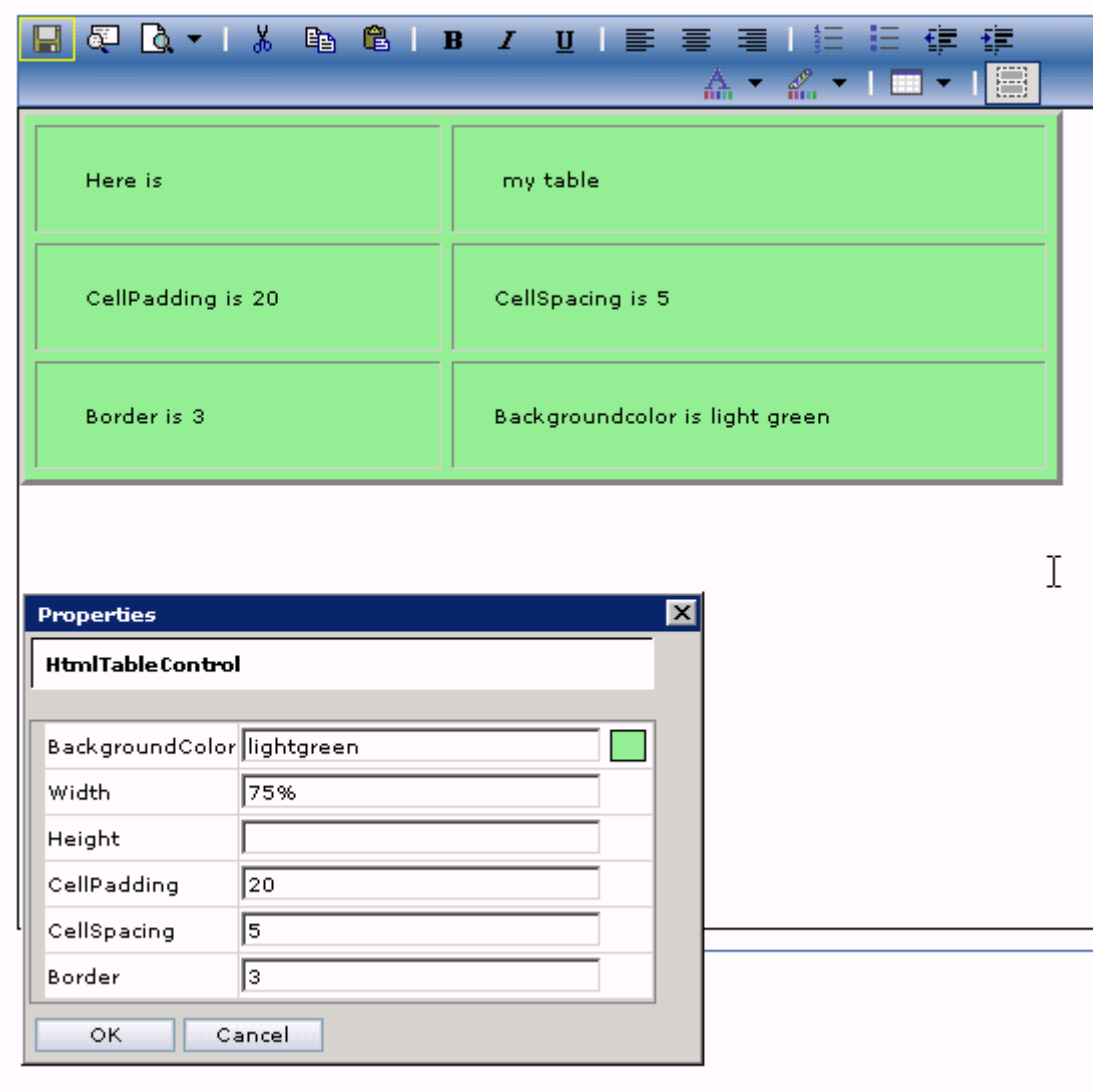


Figure 150 More table settings

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.

4.12.5.5. Cell Properties

To alter the cell properties, right-click the cell you want to edit and choose **Cell Properties** as shown below.

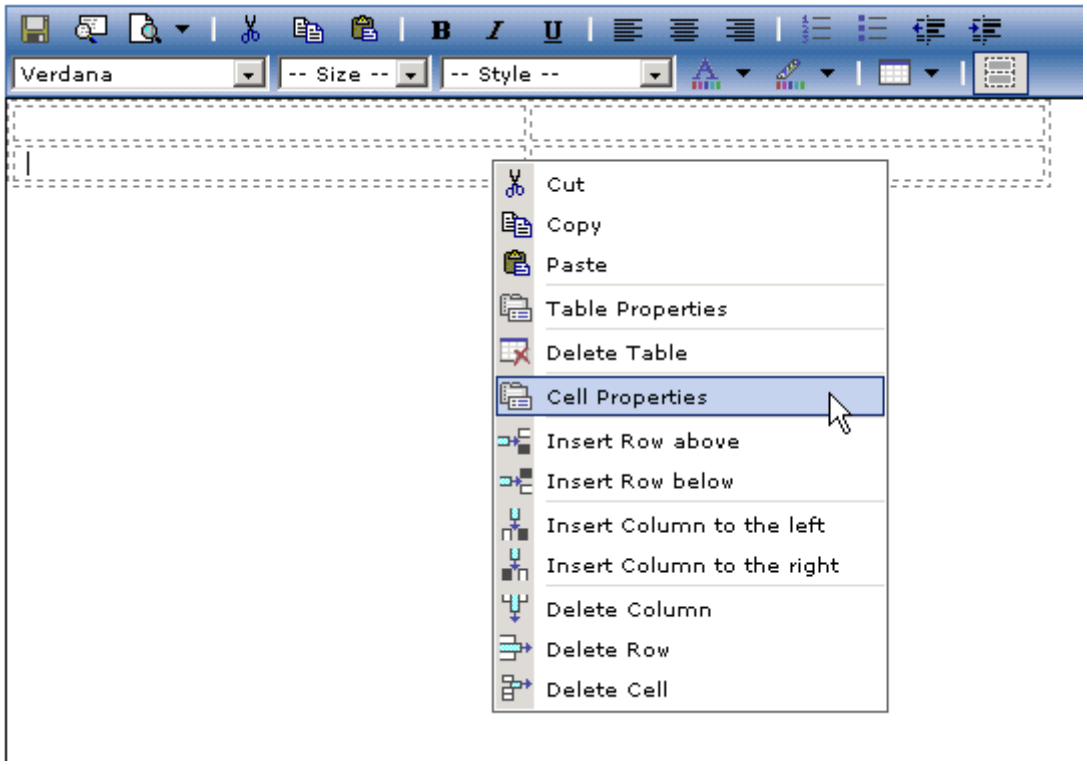


Figure 151 Opening the Cell Properties pane

The property box shown below appears.

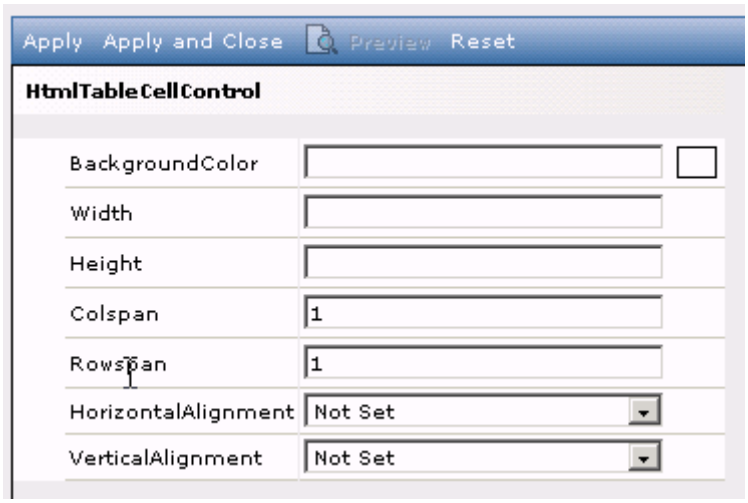


Figure 152 The Cell Properties pane

You can change the **background color, width,** and **height** using the same methods as for the table (go to Table Properties on page 112 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:

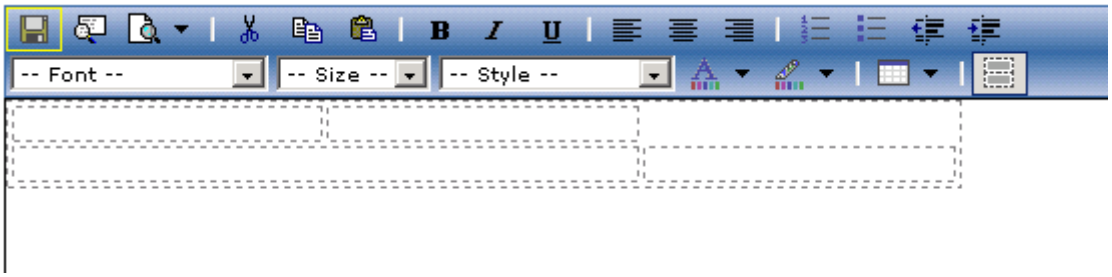


Figure 153 Colspan is set to 2 in the lower-left cell. This pushes the lower-right cell into a third column.

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.

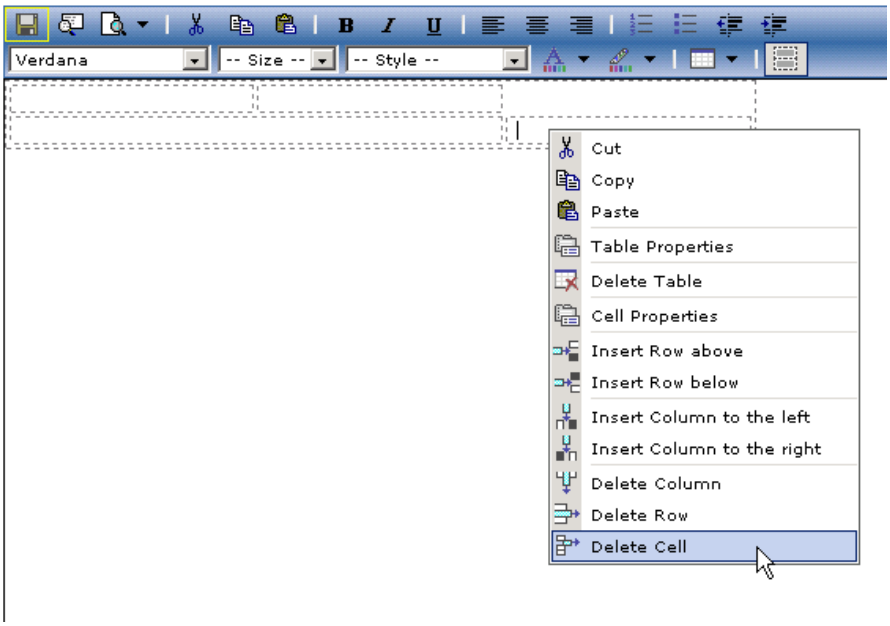


Figure 154 Deleting a cell

The resulting table appears as shown below.

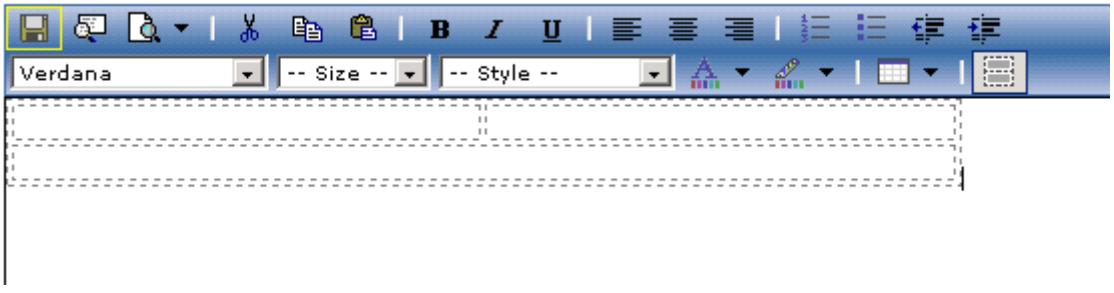


Figure 155 Merged cells

4.12.5.6. 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.

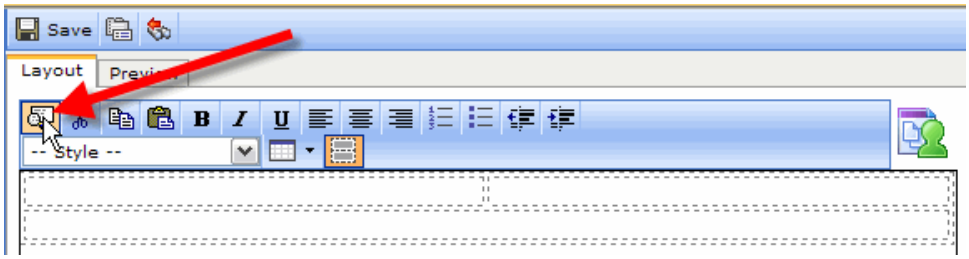


Figure 156 Switching modes

The figure below shows the table in HTML mode. To switch back to WYSIWYG mode, click the same button again.

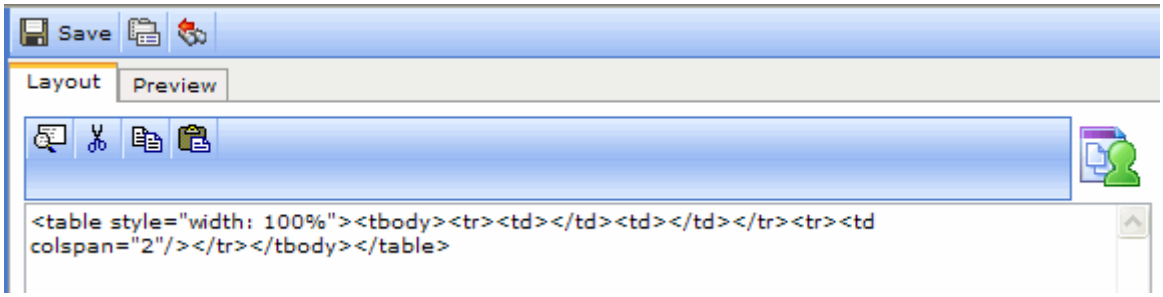


Figure 157 Example of the table definition in HTML mode

Note: When working in HTML mode, do not alter or remove the code that refers to Visual Components (page elements).

4.12.5.7. 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 ( ) 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.

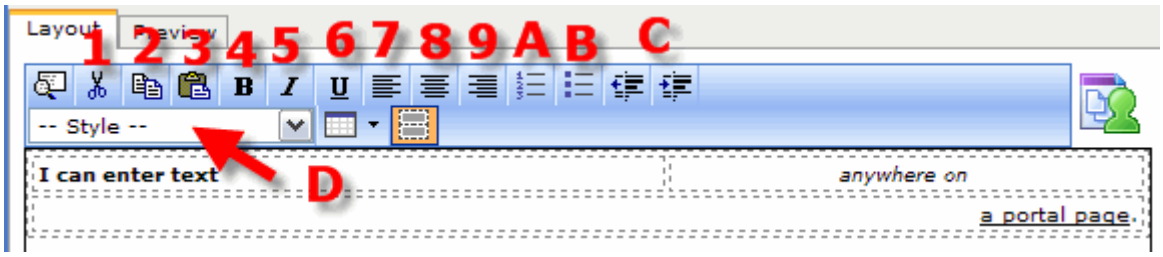


Figure 158 The formatting tools for free-form text

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		

4.12.5.8. Images

You can insert images/pictures directly onto a portal page.

- If you are in HTML mode (go to HTML Mode on page 116 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.

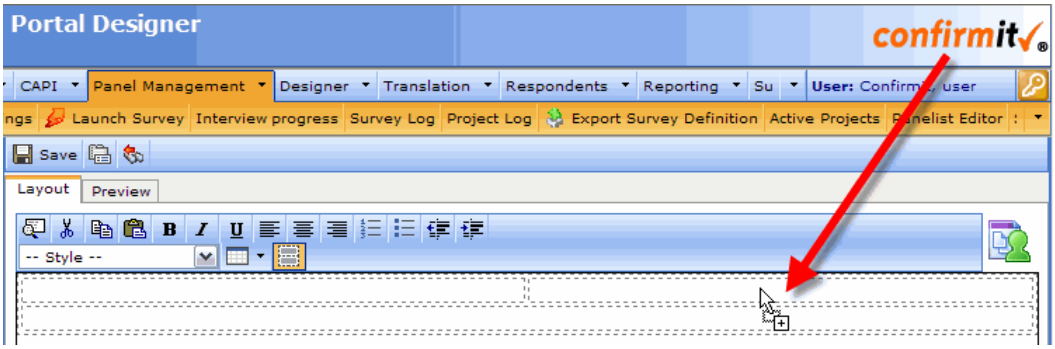


Figure 159 Dragging and dropping an Image onto a page

When the image is dropped, the page will look as shown below.

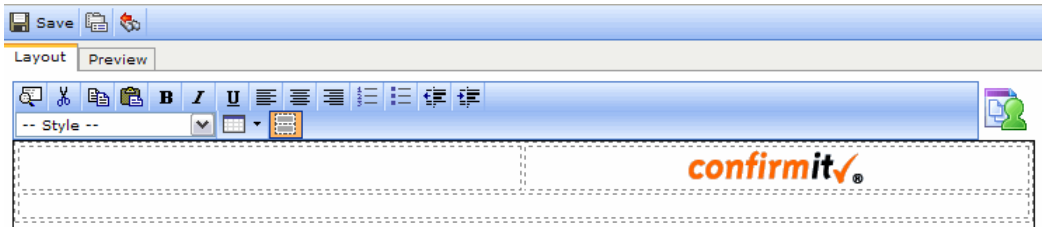


Figure 160 The page with the image inserted

You can also right-click in any table cell and select **Insert Image**.

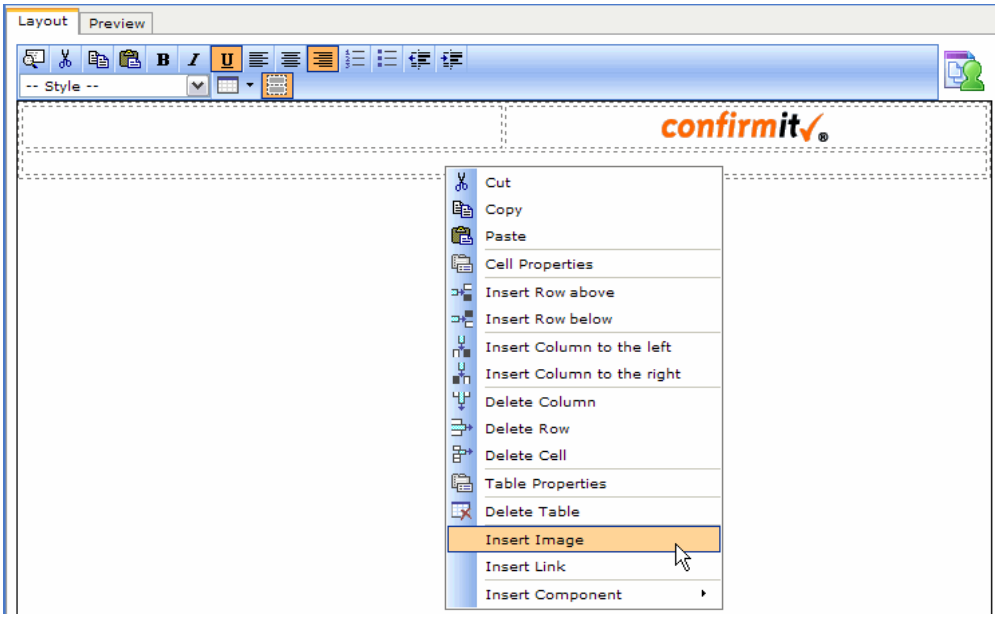


Figure 161 Inserting an image by right-clicking in a cell

This will bring up the property frame on the right side of the screen in which you can specify the source (the URL to the image), width, height, border, alt (alternative text, for use when image is not displayed), image alignment, and horizontal and vertical spacing.

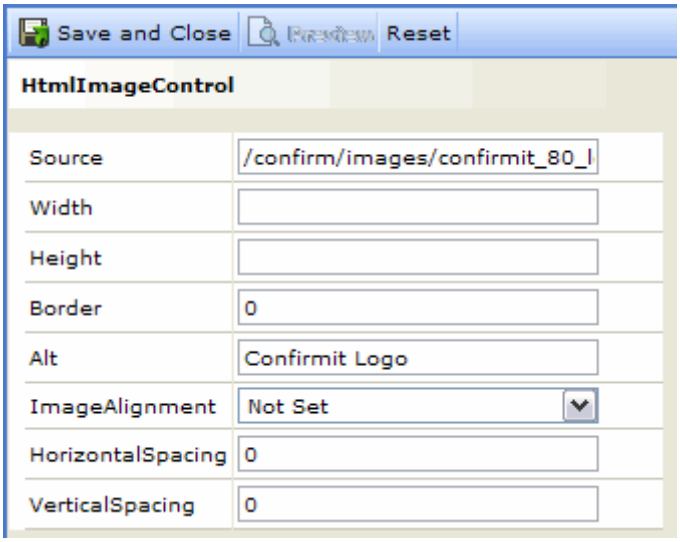


Figure 162 The image properties

4.13. Import Survey Definition

Questionnaires can be exported and imported through XML. The feature allows users to transfer questionnaire definitions, report definitions and individual report definitionsfrom one Confirmit server to another (go to Export Survey Definition on page 142 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 questionnaire from your computer:

1. Click **Import Survey Definition**.

   The Import Properties dialog box opens.

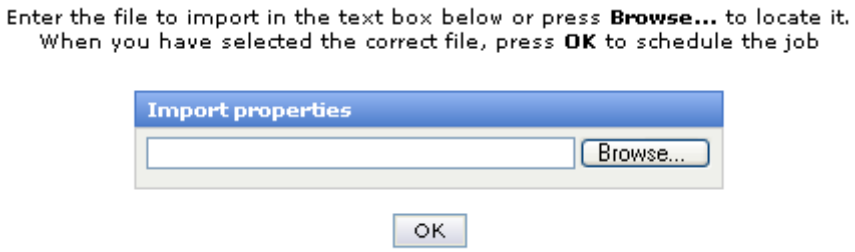


Figure 163 The Import Properties dialog box

2. Click **Browse**, and then select the local XML file or a zipped XML file (.zip) on your computer.
3. Click **OK**.

   The imported questionnaire will appear as a new project in the user's project 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.

4.14. 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.

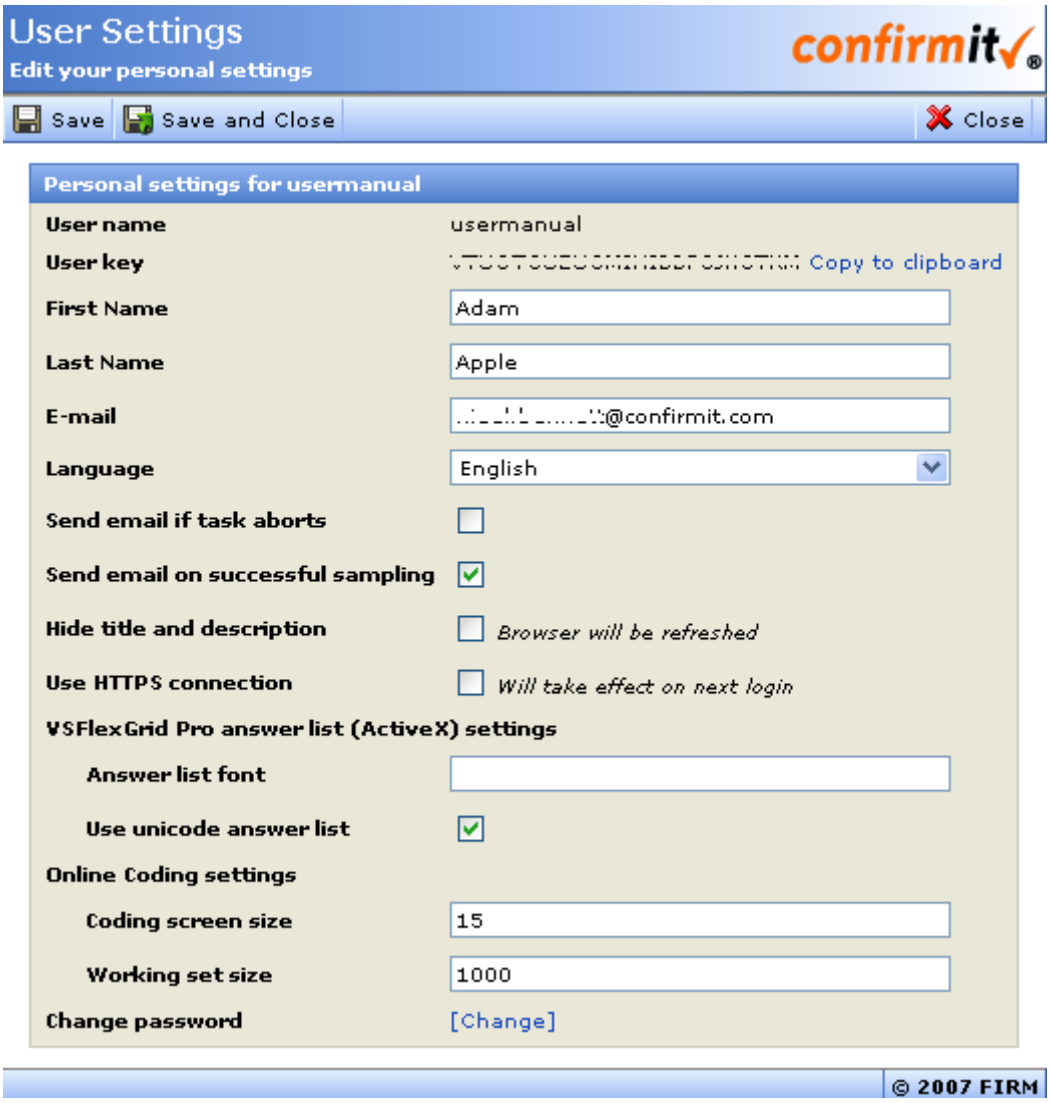


Figure 164 Example of the User Settings window

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.
- **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 language of preference. This is the language used when previewing questions and reports. This is important to note when working with multilingual projects.
- Unicode that enables the software to handle Asian languages is available in Confirmit. The user can choose any language when designing a questionnaire.
- **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 –** on successful sampling, an email is sent to the user.

- **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.
- **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.
- **Answer list font –** specify the font of the entries in Answers list. Usually it will remain empty, but in cases it is necessary to use for example Chinese, you will have to specify a font that supports the Chinese character set, for example SimSun or PmingLiu, or Arial Unicode MS. Needs to be specified when "Use Unicode Answerlist" is selected, and the default font does not seem to support the language when you edit the answers in the ActiveX answerlist (FlexiGrid) editing mode.
- **Use Unicode Answerlist –** active by default. When editing answer lists and scales in Professional 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 on Windows XP, Windows 2000 and Windows NT, and one that does not support Unicode and can be used on Windows 95, 98 and ME. You can select which version to use in you 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** (go to Online Coding Tool on page 374 for more information).
- **Working set size –** specify the number of answers you wish to work with at a time. If for example you have 50 000 answers, you may wish to work in smaller batches, as for example 1000 at a time. Thus Online Coding Tool will process the information faster than if you worked with all 50 000 answers simultaneously (go to Online Coding Tool on page 374 for more information).
- **Change password –** click to open the Change Password dialog.

4.15. 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.

Home > Help > Confirmit extranet – is a direct link to the customer extranet. Customers withserver 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 > Language overview – a list of 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 > About – information about the Confirmit build you are using.

4.16. 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.

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.

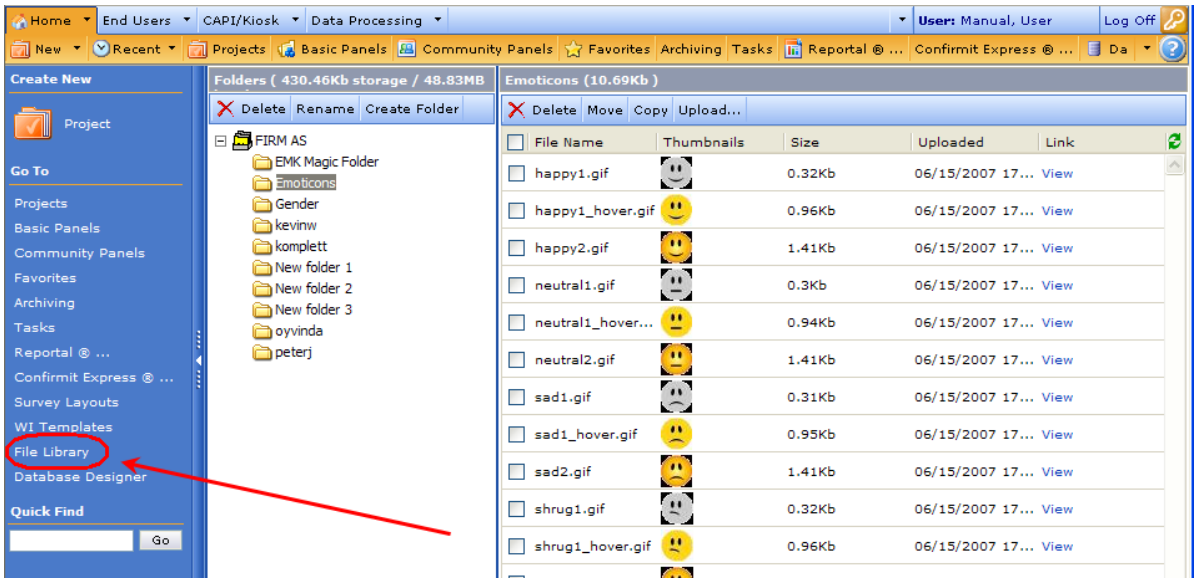


Figure 165 Example of a File Library folder

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 Company or send an email to support@confirmit.com. On-Premise clients must contact their Confirmit server manager.

5.1. Limitations

- 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 ASP.
- On the ASP, 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 ASP site does not support streaming. As such, use of audio / video files (if you have been granted such ability upon request to Confirmit Company) 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.

Two 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.

Access the File Library either via the **Home > File Library** menu command or by clicking the **File Library** link in the Quick Access pane.

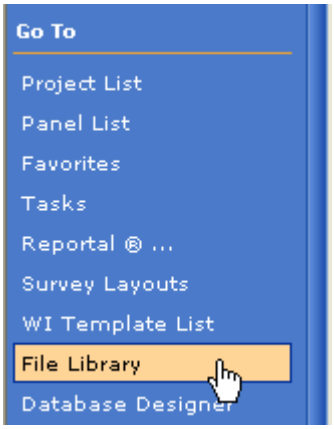


Figure 166 Accessing the File Library via the Quick Access pane

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

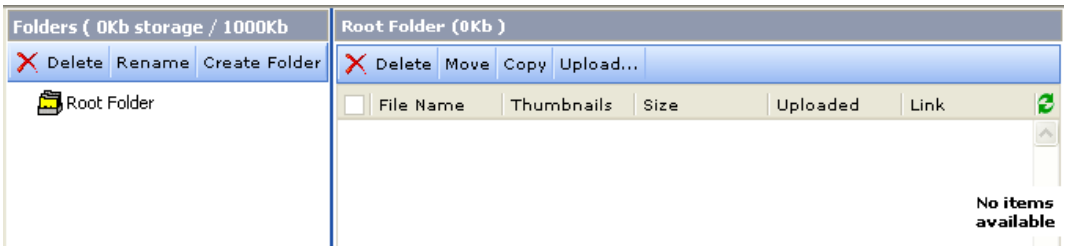


Figure 167 An empty File Repository

- 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, are displayed in the upper frame of the window above the left column. In this example the values are 0kb and 1000kb 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 (0kb).

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 168 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.

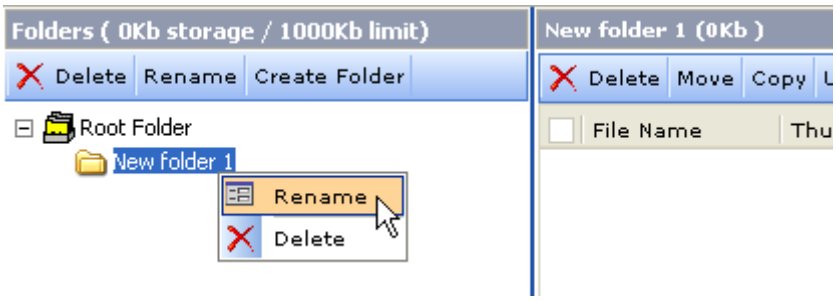


Figure 169 Renaming the new folder

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



Figure 170 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.

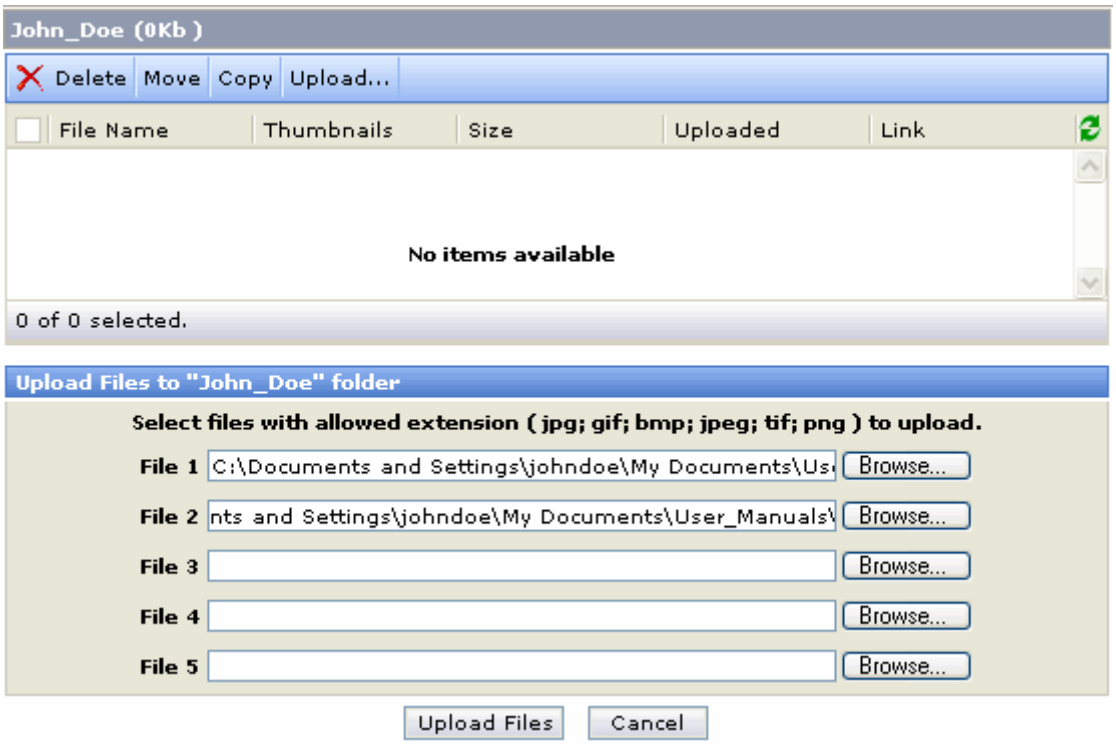


Figure 171 Uploading files

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 (_).

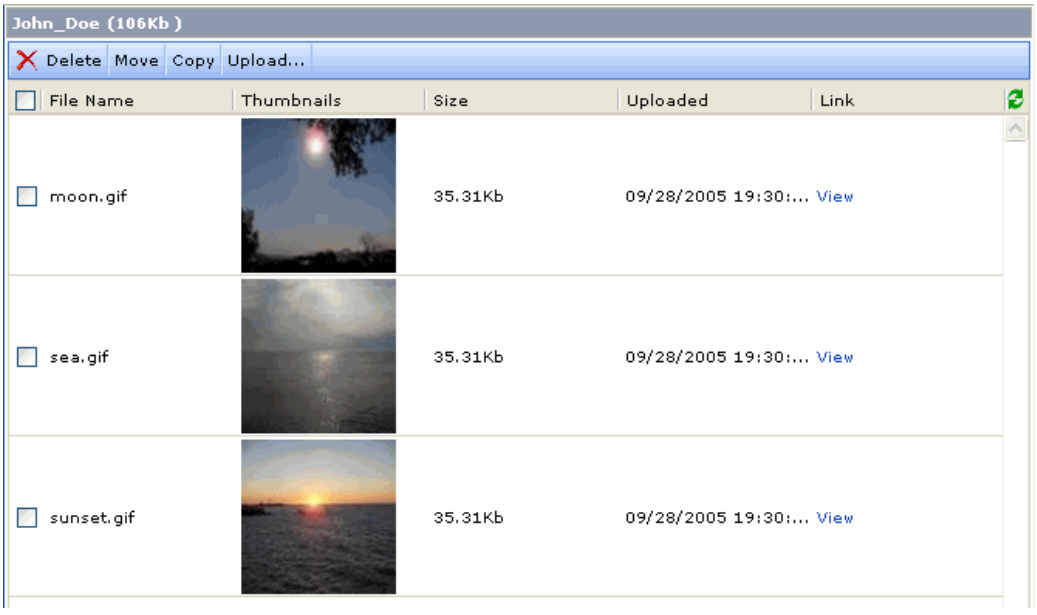


Figure 172 Example of uploaded files

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.

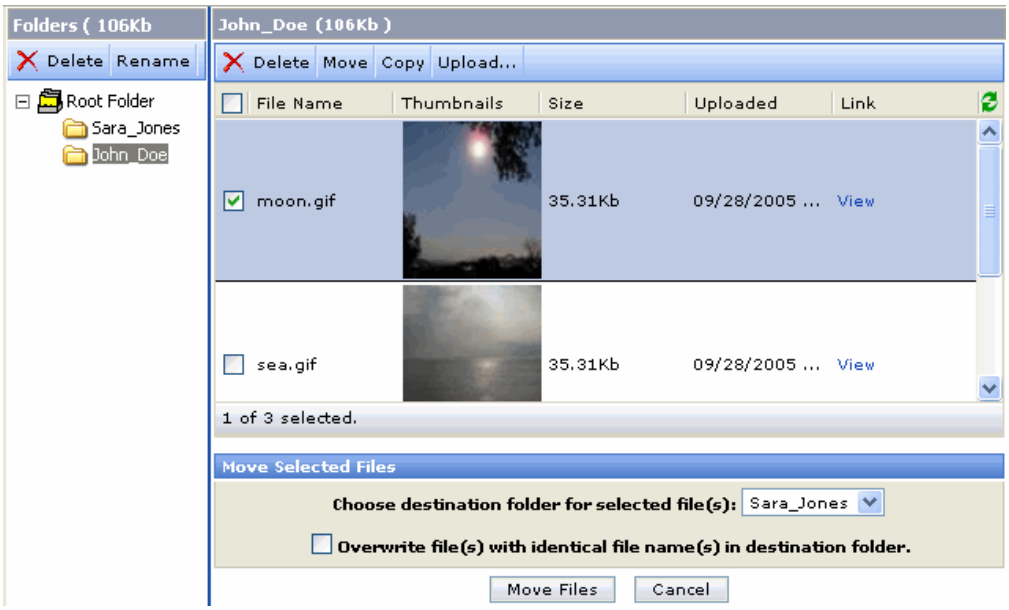


Figure 173 Moving files

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 (go to How to Include an Image in a Text Field on page 128 for more information). For the Answer fields, you can drag-and-drop the images directly from the File library (go to How to Include an Image in an Answer Field on page 128 for more information). Once an image is in a field, you can resize it and delete it as necessary (go to How to Resize and Delete an Image on page 130 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

To include an image in a field on the Text tab, 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.

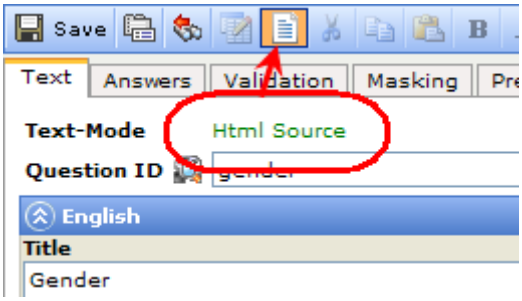


Figure 174 Select the HTML Source mode

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

   ```
   <img src="isa/<URL_of_the_image>">
   ```

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

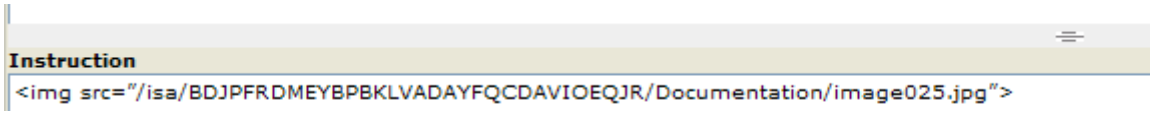


Figure 175 Example of the HTML URL code to an image in the File Library

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 an Answer Field

To include an image in a field on the Answer tab, proceed as follows:

1. Open the page in the questionnaire into which you wish to add an image (or other file).
2. Ensure you are in the WYSIWYG editing mode (if not, click the tool as arrowed in the figure below).
3. Go to the appropriate tab, right-click in the text field, and select **Find Image**.

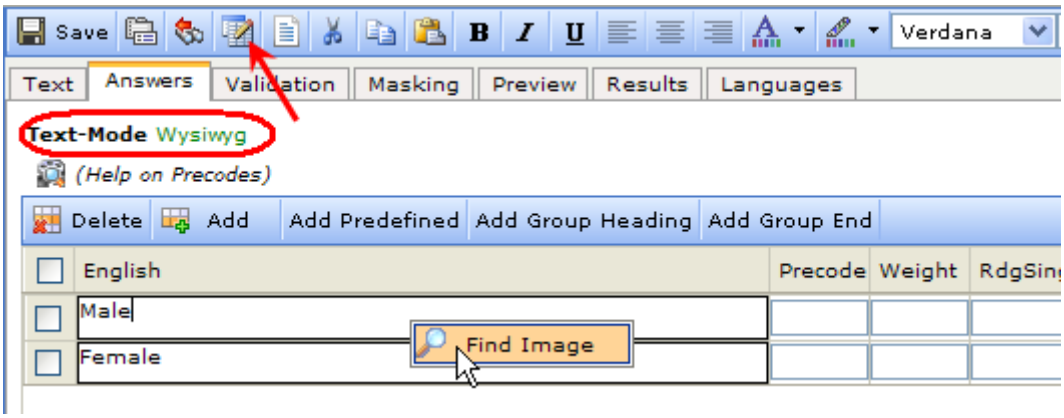


Figure 176 Select the WYSIWYG editing mode then find the image

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

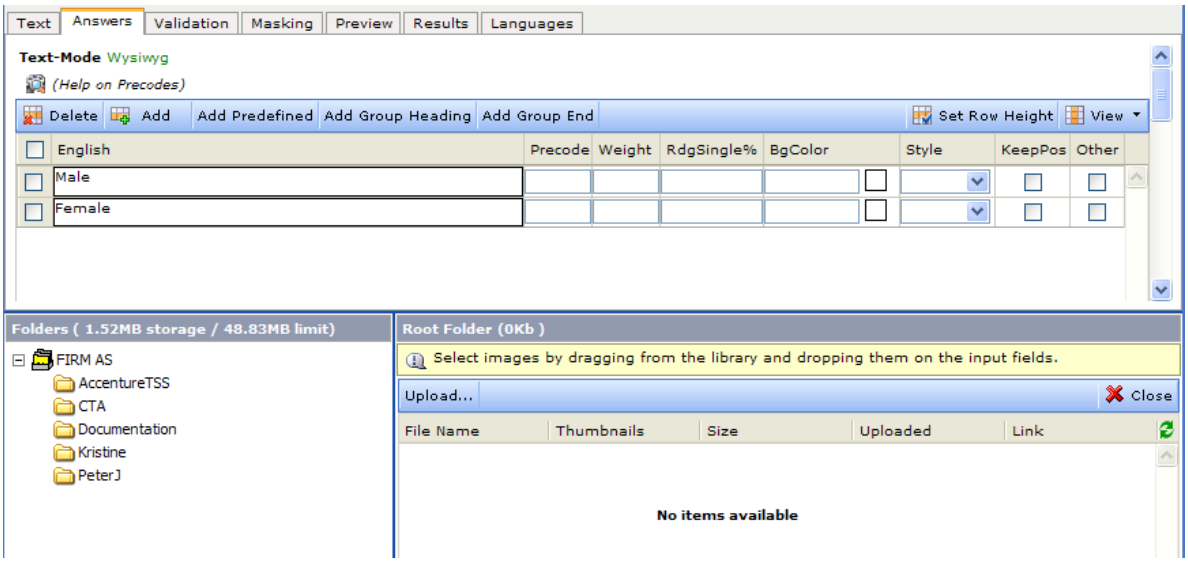


Figure 177 The question form with the File Library open below

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.

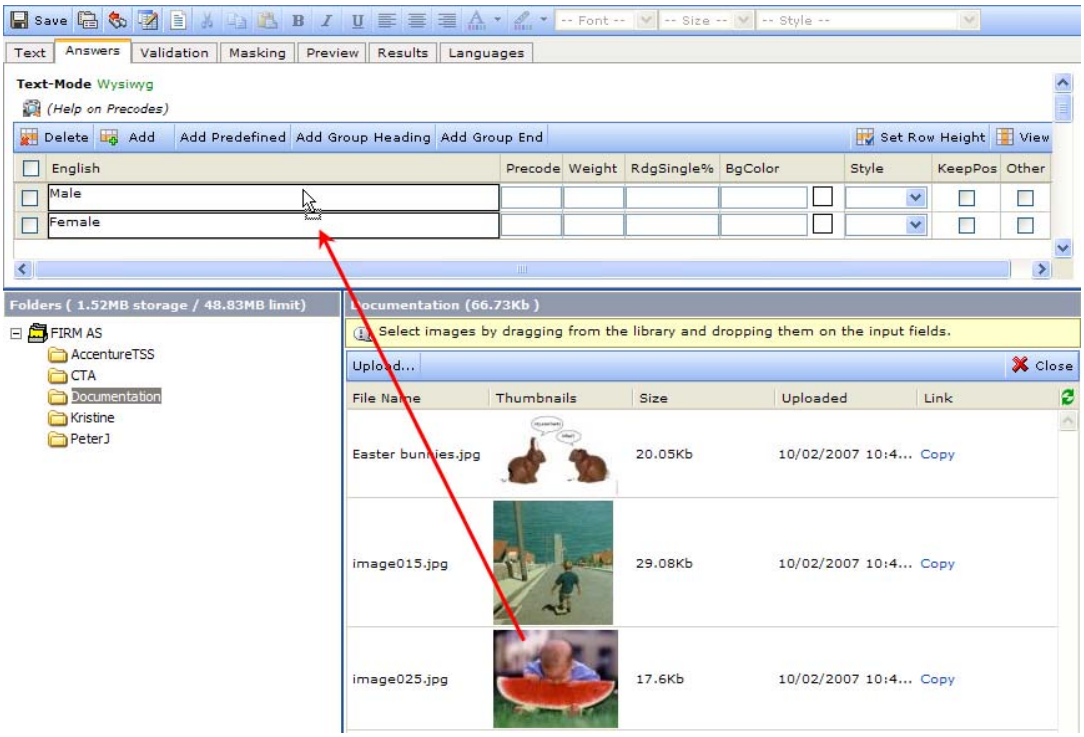


Figure 178 Dragging an image into the Answer field

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 (go to How to Include an Image in a Text Field on page 128 for more information)

5.5.3. How to Resize and Delete an Image

To resize an image file:

1. In the text input field, click on the image in the field to select it.

   The resizing grips appear as shown in the figure below.

2. Click on a grip and drag it such that the image is resized as required.

   A dotted line indicates the frame of the image while the image is being resized.

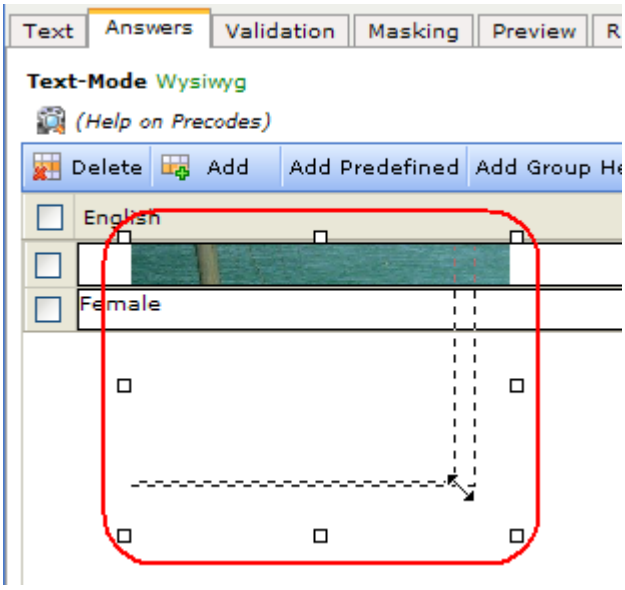


Figure 179 Resizing an image on the Answers tab

3. When the image is the desired size, release the grip and save the changes.

To delete an image/file from a field, click on the image to select it (resizing grips become visible) and press the **Delete** key on your keyboard.

5.6. 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: + % / \ ? # $ & * | : " < >.

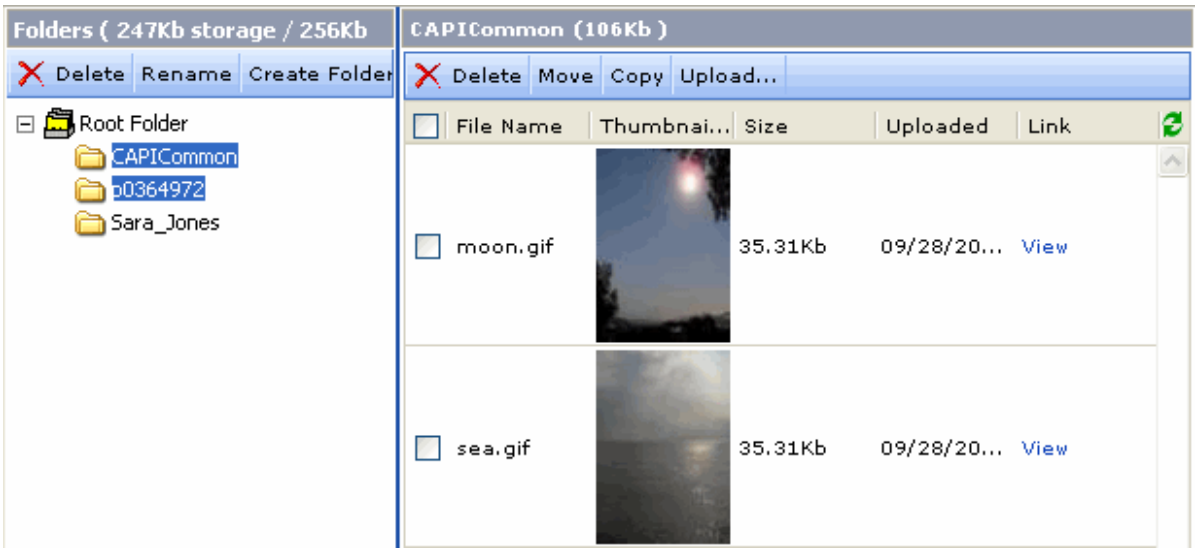


Figure 180 Files Used in CAPI Surveys

6. Project Management

When you create a new project or enter an existing project, you enter the Project Management area for that project. The following sections describe each Project Management area in more detail.

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 (go to Creating a New Questionnaire on page 145 for more information). To open the Overview page, got 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.

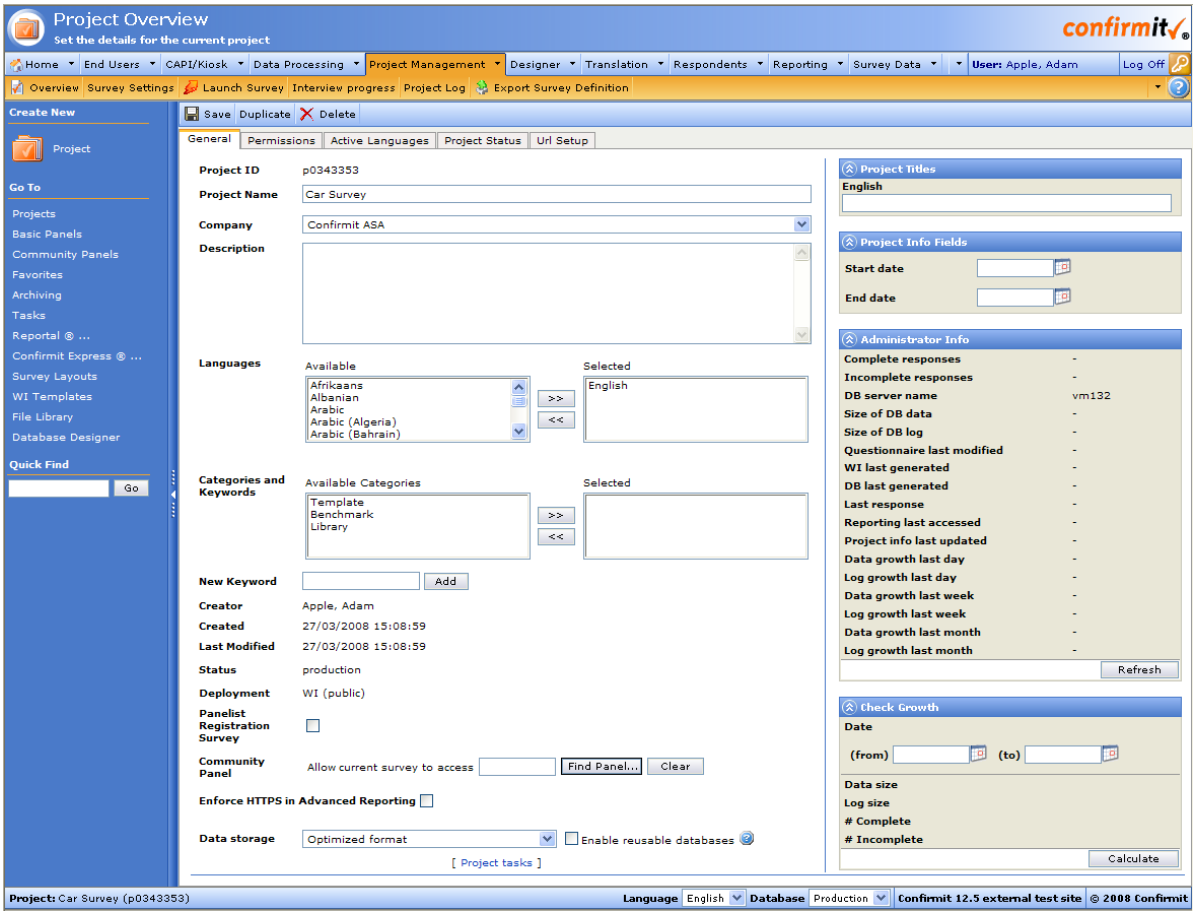


Figure 181 Example of the Project Overview page, General tab

Note: If the project you have selected is a Confirmit Express project, you will also have the Convert to Confirmit Professional 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 (go to Confirmit Express on page 143 for more information).

The fields are as follows:

- **Project ID –** system-generated unique identification number. This is created when the project is created, and cannot be changed.

- **Project name –** a title you choose for the project. Be aware that this will be the title of the browser window in a live WI survey.
- **Company –** your company's name.
- **Description –** here you may enter a more detailed description of the project.
- **Languages –** here you can select the working language(s) of your project. The *Available* field contains all the languages that are supported in Confirmit. The *Selected* field will contain the working languages of your project. You highlight a language in the *Available* field and click the arrow button to add it to the *Selected* field.
- **Categories and Keywords –** you can categorize projects. 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 Projects.
- **New Keyword -** In addition to the predefined categories, users can add their own free text categories, like for example "Demos", "E-SAT", "Brand recognition", etc. It will be possible to use these categories when searching for projects 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. This information is also displayed in the lower frame of the Confirmit window.
- **Status –** the project status (go to Project Status on page 138 for more information)
- **Deployment –** the survey type (Public/Limited/Pop-Up) Web Interview. The Open link to the survey will be displayed next to the survey type.
- **Panelist Registration Survey** - check this box if the survey you are creating is to be used for panelist registration.
- **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 (go to Enabling External Test Access on page 305 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.
- **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 project.
- **Data Storage** - If you have administrator rights to this project, and while the database has not yet been generated (launched), you can select the type of database that the project is to use. The options are Legacy Format (the "old" format used until Confirmit 12.5), and Optimized Format (available from Confirmit 12.5) (go to The Optimized Database Format on page 24 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 project, a **Recurring tasks** link will be displayed at the bottom of this page.

The **Project tasks** link will be displayed to users with Administrate permissions to a project. The link gives quick access to the Task Management page that will contain all tasks for the current project.

Note: Only users with project administrator access or those with access to a Designer (either professional or standard) can save changes on the Project Overview page.

A number of information fields will be displayed alongside the Project Overview page, to users with Project Administration permissions (Project Creators) to a project. These are described in the following sub-sections.

6.1.1.1. The Project Titles and Info Fields

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

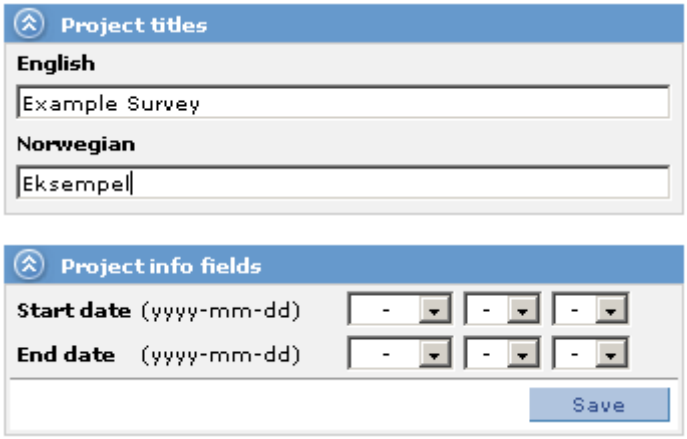


Figure 182 The Project Title and Info Fields

- **Title** - The title of the project, which you want to be displayed in the survey (add primitive ^SNAME^ in the template) (go to Web Interview Templates on page 80 for more information), and for the End Users of reports in the report portal, or in Panelist Portal.
- **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 (go to Project Status on page 138 for more information).

6.1.1.2. The Administrator Info Field

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



Figure 183 The Administrator Info details

- **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).

6.1.1.3. The Check Growth Field

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

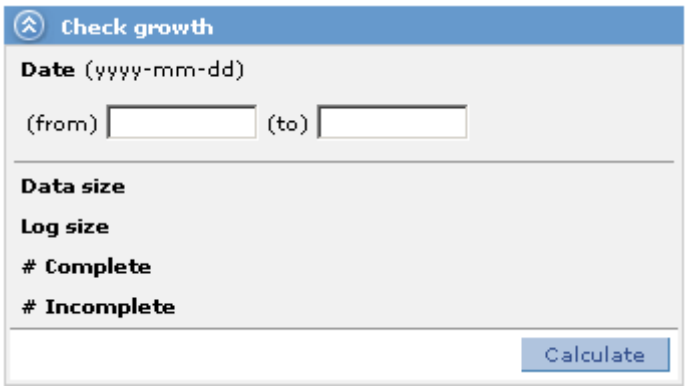


Figure 184 The Check Growth details

- **From date** - Use to specify the from date when checking the growth within a specified range.
- **To date** - Use to specify the to date when checking the growth within a specified range.
- **Data size** - The calculated database data growth from the range specified above.
- **Log size** - The calculated database log growth from the range specified above.
- **# Complete** - The calculated growth in complete responses from the range specified above.
- **# Incomplete** - The calculated growth in incomplete responses from the range specified above.
- **Calculate** - Perform the calculation and display the results on the page.

6.1.2. 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 tab, and the project administrator can give other users permission to view the new project.

Go to the Permissions tab to open the page shown below.

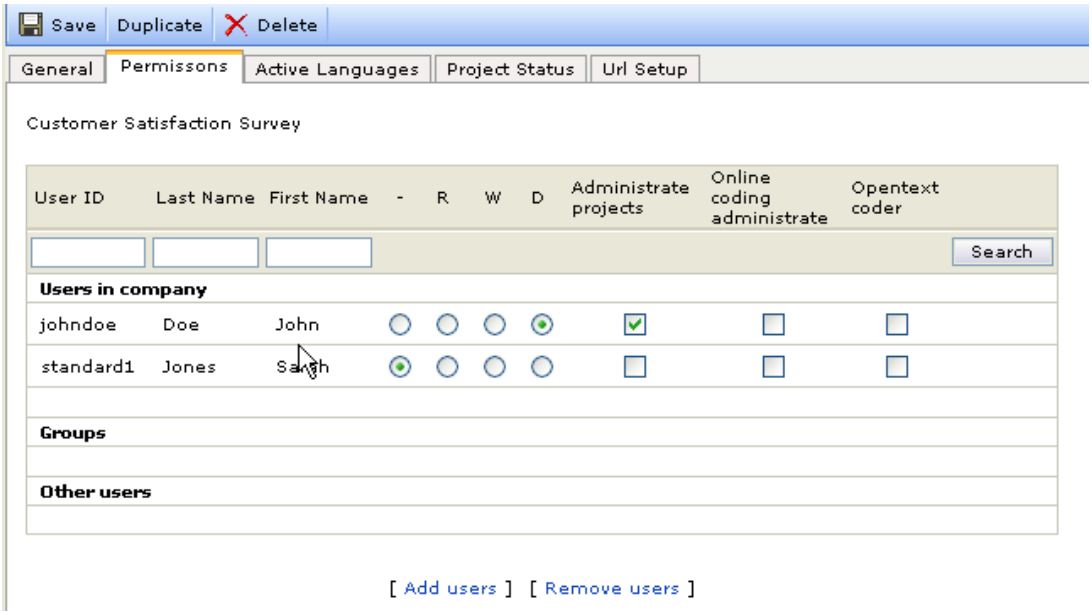


Figure 185 Example of the Object > Permissions tab

The fields are as follows:

- **Name** - The userid and the full name of the user (if entered in user settings in Confirmit) will appear in this field.

- **-** - The user does not have access to the project.
- **R** - The user has only Read permission, i.e. he/she can view the questionnaire and reports and is not allowed to add new or delete existing elements in them.
- **W** - The user has Write permission, i.e. he/she is allowed to add questions to the questionnaire and reports.
- **D** - The user has Delete permission, i.e. he/she is fully allowed to work on the questionnaire and reports, including the permission 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.
- **Online coding administrate** - The user has permission to administer the Opentext coders for the current project.
- **Opentext coder** - The user has permission to code open-ended questions in a specific project (go to Online Coding Tool on page 374 for more information).

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.

6.1.2.1. How to Add 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 of these users. Typically, an external user will send you his or her user key by email.

1. Copy this key and click the **Add users** button at the bottom of the Permissions tab.

   The User Key Entry window opens.

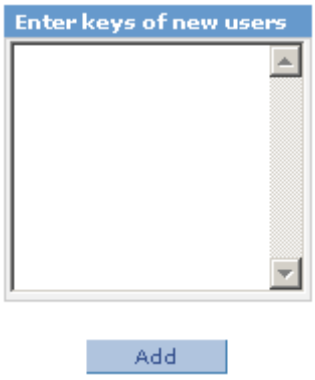


Figure 186 The User Key Entry window

2. Paste the key into the User Key Entry window.

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

3. Click **Add**.

   The Entry window closes and you are returned to the Permissions tab. The newly added user will be listed in the **Other users** field.

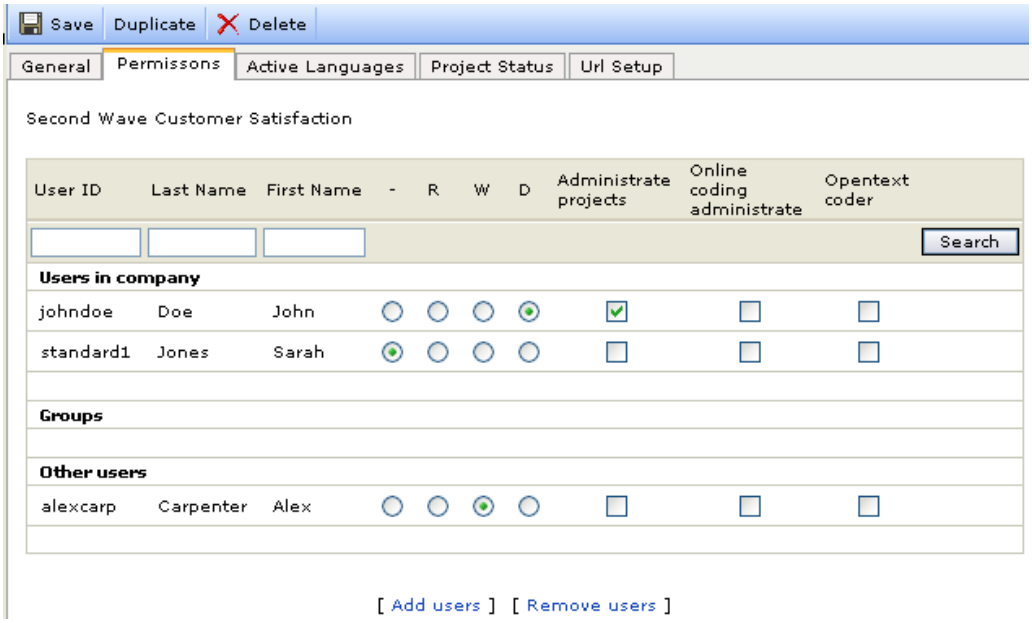


Figure 187 A New User Added to the Other Users field

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.

6.1.3. The Active Languages Tab

This page lists all the project languages in a multilingual project. You can work with up to five languages at one time. Select and deselect languages by checking/unchecking the check-box. Note that the maximum of five languages only refers to what you see whilst working in the Authoring system; it has nothing to do with what the respondents will see.

6.1.4. Project Status

Use this tab to set the project status.

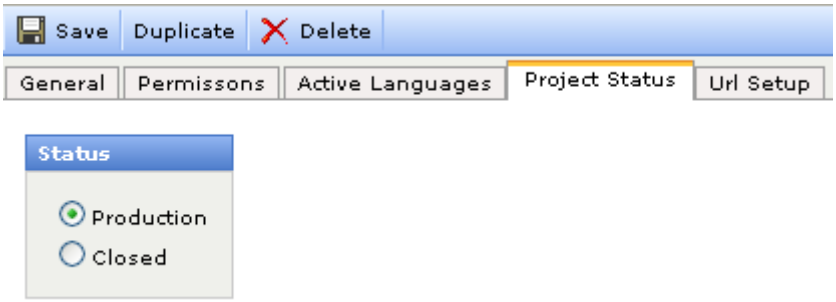


Figure 188 The Project Status tab

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 the following message will be displayed to them if they attempt to do so.

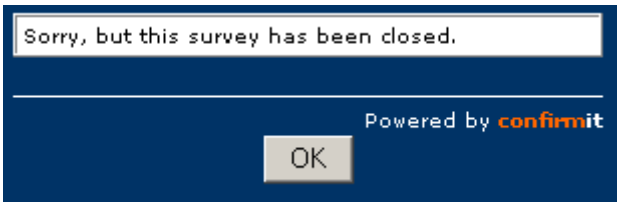


Figure 189 Survey Closed Message

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.

6.1.5. URL Setup

Use the options on this tab to specify where the respondents are sent (which website) when they have completed the survey.

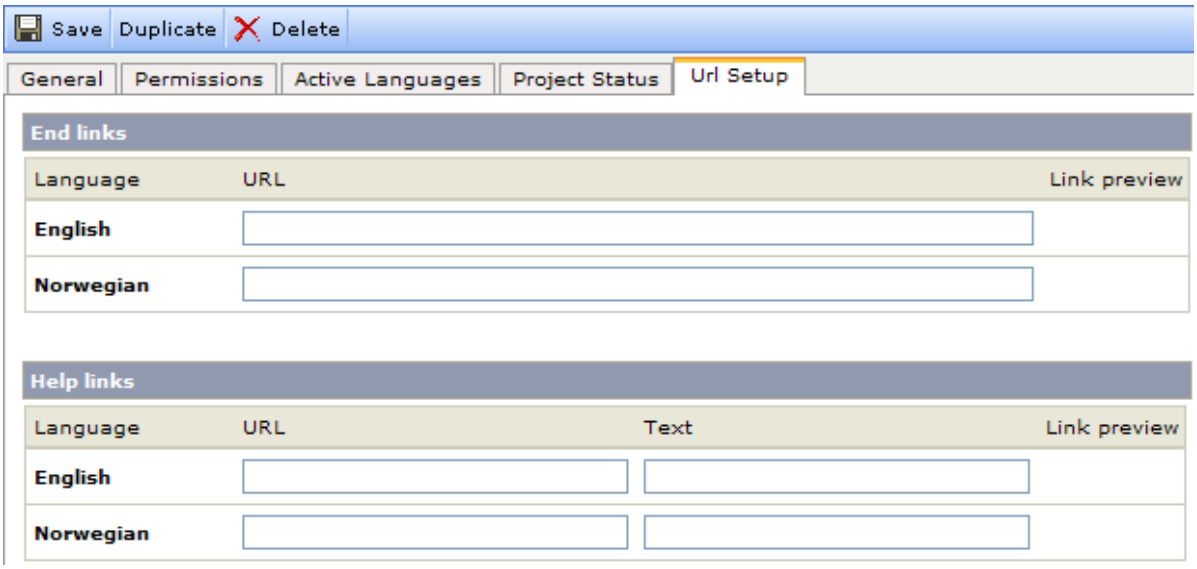


Figure 190 The URL Setup tab

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.
- **Help links -** enter a URL to a website you wish to use either for additional information or for other purposes in the questionnaire. In this case you must include the primitive ^ HELP^ in the WI template you wish to use for this survey. 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.

Note: If you use Unicode languages in the URL Setup text fields, you will have to translate the Unicode text into HTML code first by using Unicode Translator in a Script node (go to Unicode Translator in Script Nodes on page 287 for more information). Then use this HTML code in the text box for for example Help text in URL Setup.

The End link must be defined before you compile the survey database:**URL Setup >Launch Survey**.

6.1.6. 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, you can 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 and Online reporting reports, but not the response data from the original survey. You can now rename and modify the questionnaire.

6.1.7. 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.

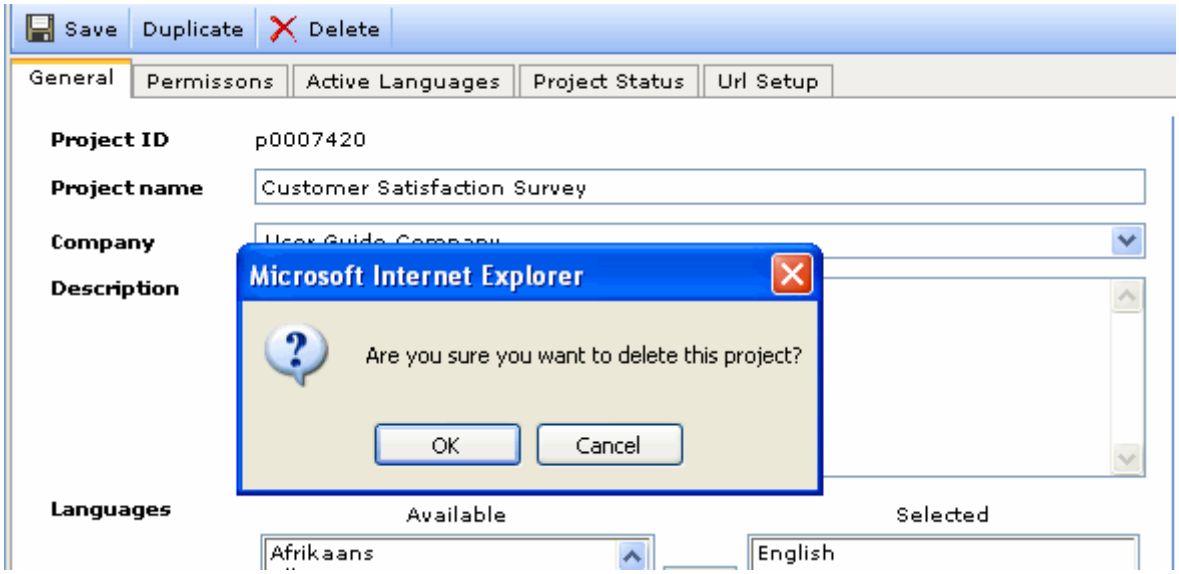


Figure 191 Deleting a project

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

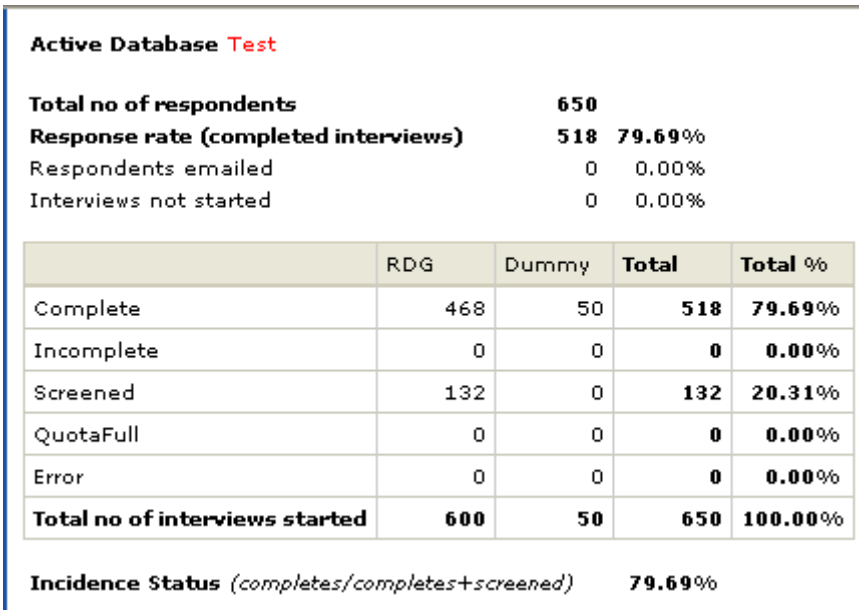
Note: This action cannot be reversed. Once you click OK in the confirmation box, the project will be deleted and cannot be "undeleted".

6.1.8. 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.

6.2. Interview Progress

The **Project Management > Interview Progress** page provides up-to-date information on the current state of the survey with regards to the total number of respondents, number of completes, incompletes, quota fulls, and errors etc. The figure below shows an example of the interview progress page for a project's test database.



Active Database Test

Total no of respondents	**650**	
Response rate (completed interviews)	**518**	**79.69%**
Respondents emailed	0	0.00%
Interviews not started	0	0.00%

	RDG	Dummy	**Total**	**Total %**
Complete	468	50	**518**	**79.69%**
Incomplete	0	0	**0**	**0.00%**
Screened	132	0	**132**	**20.31%**
QuotaFull	0	0	**0**	**0.00%**
Error	0	0	**0**	**0.00%**
Total no of interviews started	**600**	**50**	**650**	**100.00%**

Incidence Status *(completes/completes+screened)* **79.69%**

Figure 192 Example of an Interview Progress page

- **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. Project Log

The system records actions executed on a project basis. The Project Log provides you with an overview of all changes that have been made to the project. The system records the exact time when changes are made, the user who makes the changes, and specifies every change.

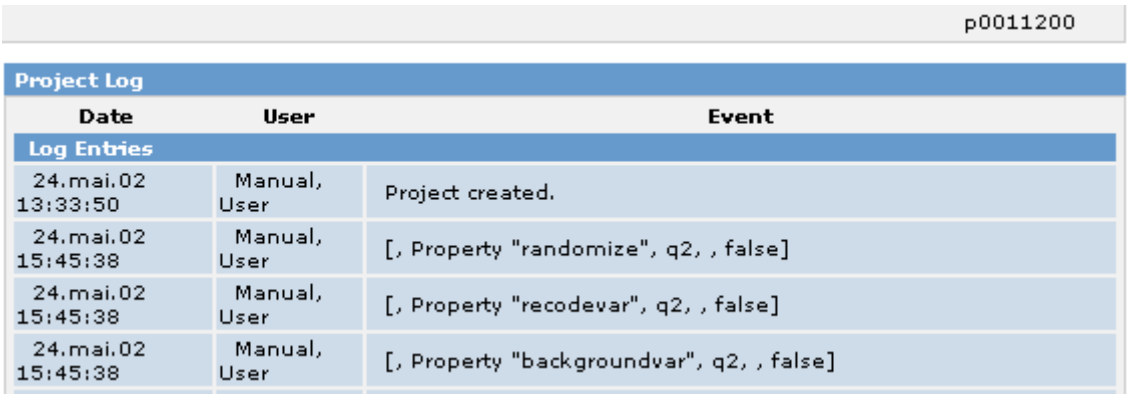


Figure 193 Example of a Project log

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:

1. Activate the survey (select it from the project list).
2. Click **Export Survey Definition**.

   The Export Properties dialog opens as shown below.

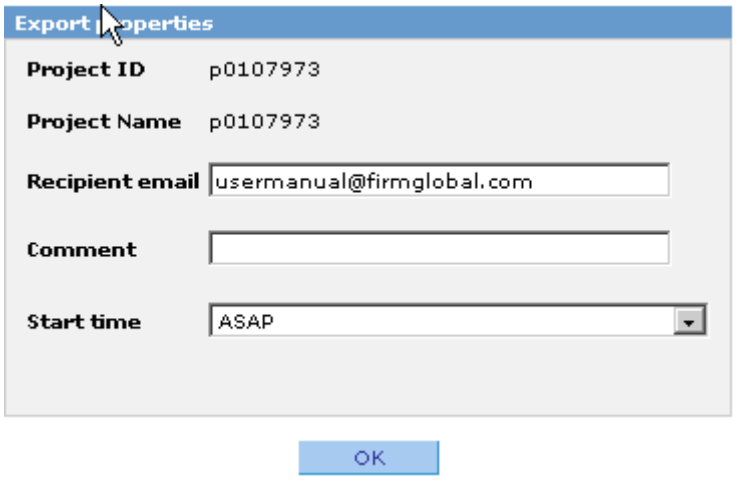


Figure 194 The Export Properties dialog

3. Set the export properties as required (or keep the default settings), then click **OK**.

   Note that you can schedule the export for execution ASAP or schedule it for later execution.

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. Confirmit Express

If the project you have selected is a Confirmit Express project, you will also have the **Convert to Confirmit Professional** 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).

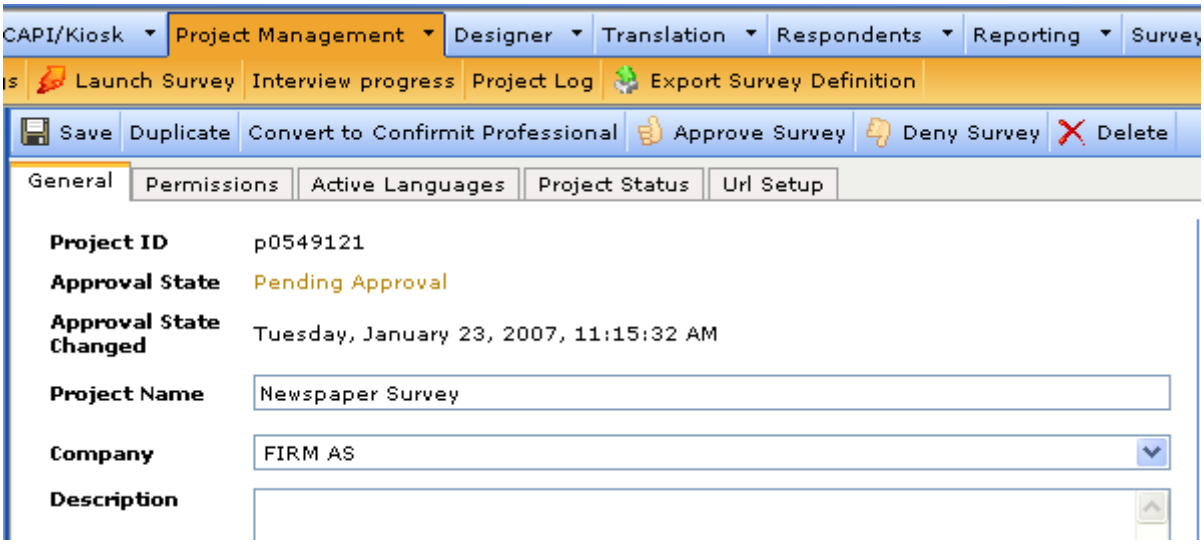


Figure 195 The Project Overview General tab for an Express project

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

6.5.1. How to Convert a Project from Express to Professional

Confirmit Express surveys can be converted to Confirmit Professional. You will need a Confirmit Professional user login to do this. To convert a survey:

1. Log on to Confirmit Professional and open the survey.
2. Go to the **Project Management > Overview** menu command.
3. In the page's toolbar, click the **Convert to Confirmit Professional** button.

   A warning message is displayed.
4. Confirm the conversion.

Important: Be aware that once an Express survey has been opened in Confirmit Professional 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.

6.5.2. 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 Professional Designer. Standard Designer is designed for simple questionnaires with no advanced scripting or routing. This manual describes Professional Designer.

7.1. Creating a New Questionnaire

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.

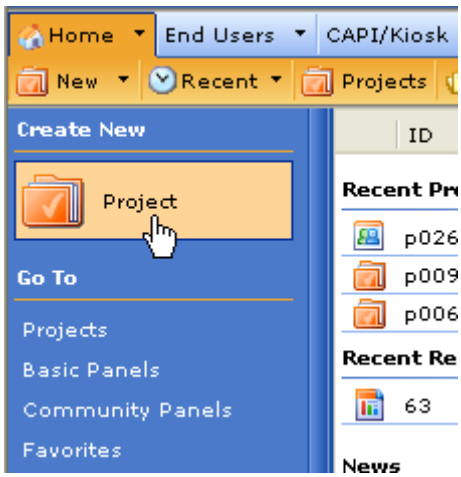


Figure 196 The Create New Project icon

The Project Name dialog opens.

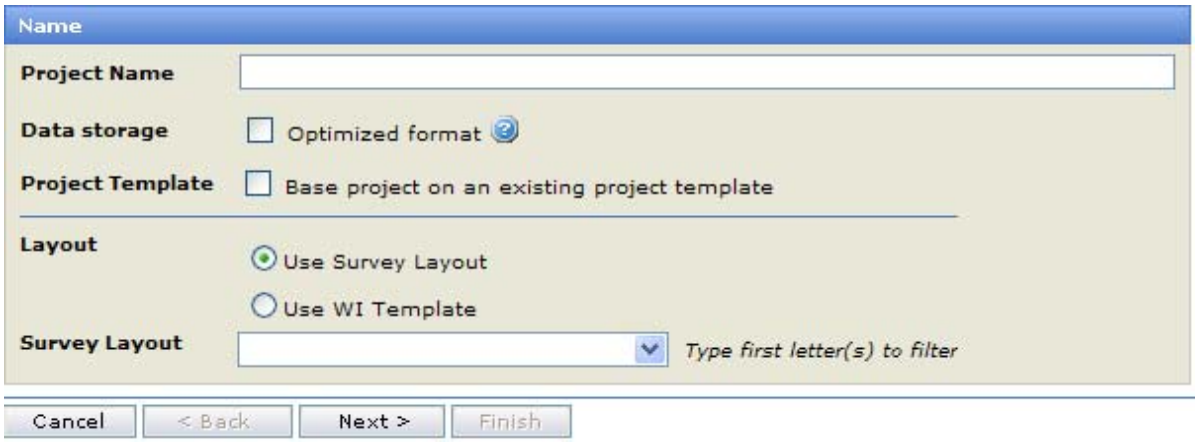


Figure 197 The Project Name dialog

3. Type the name of your project into the Project Name field.

   For this example, the project is called **Car Survey**.
4. Select the type of data storage you wish to use (go to The Optimized Database Format on page 24 for more information). Note that you can change this until the database is generated.
5. Select whether you wish to use a Survey Layout or a WI Template.
6. If you wish to use a Survey Layout, click the down-arrow to open the drop-down list of the survey layouts available, and select the desired layout.

For this example the **Public Survey Layout – A1 – Green and Orange Themes** option is used.

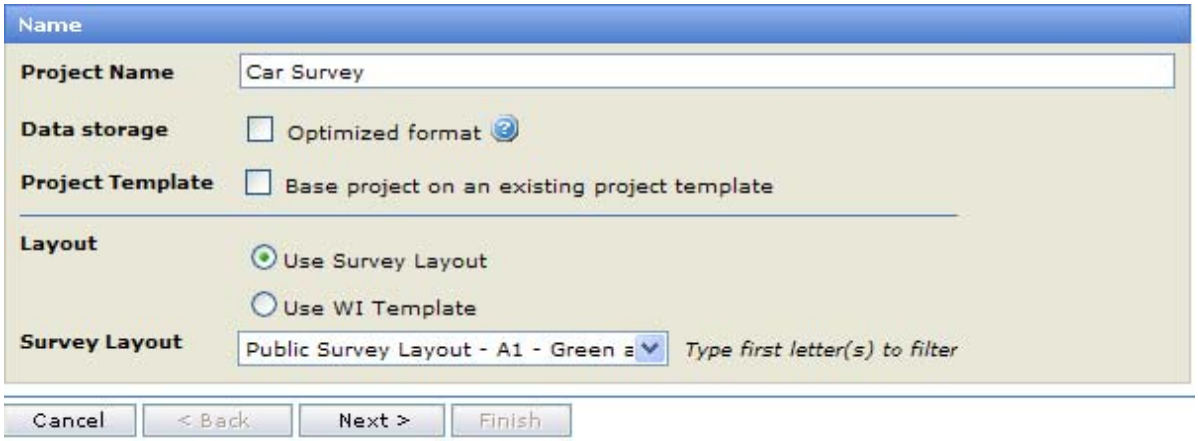


Figure 198 The completed Project Name dialog

7. Click **Next** to proceed.

   The Select Languages dialog opens.

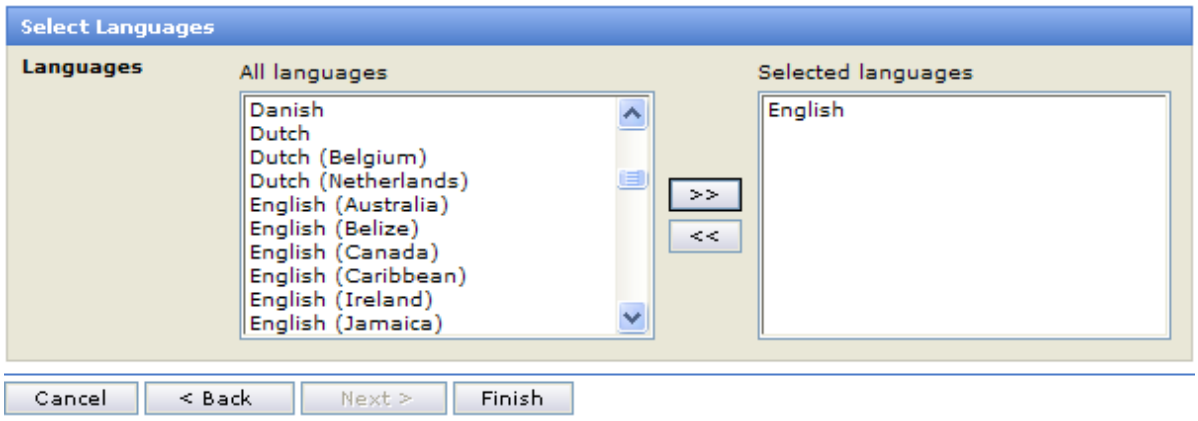


Figure 199 The Select Languages dialog

Here you specify the language(s) this project is to use. By default Confirmit suggests the language selected in your User Settings, in this case **English**. To add a language to the Selected Languages list, click on the language in the All Languages list to select it then click the **>>** button. To remove a language from the Selected Languages list, select it in the list and click the **<<** button. Note that you can also go into the Project Management page later and add/remove language(s) as required.

8. Click **Finish**.

   The project is created and the Project Management page for the project opens. Here you add details such as a description, additional languages and categories to your project.

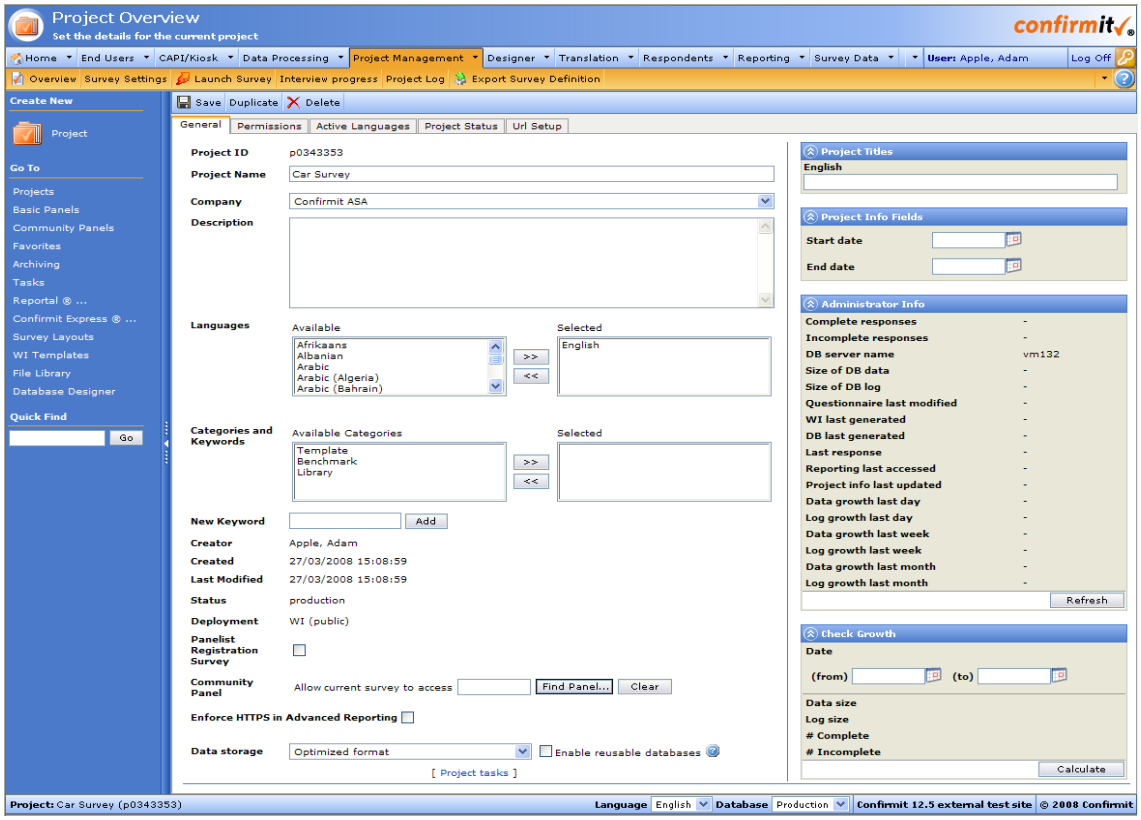


Figure 200 The Project Management page General tab

9. On the General tab, type a suitable description into the Description field to simplify identification later.

The project now exists. You must now add the questions to the project. Note that Confirmit has given the project/survey a unique Project ID.

Note: For projects created in C12.5 - 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.

7.2. How to Add New Objects to the Questionnaire Tree

There are two methods of creating forms in the questionnaire:

- **Dragging and dropping** – drag objects from *the New Objects* toolbox, and drop them in the project folder in the Questionnaire Tree toolbox (the project folder is the top item in the Questionnaire Tree toolbox).

  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-punch form will be inserted as the first question in the survey.

- **Right-clicking the destination** – right-click the destination for the object (the project icon), then select **Insert >**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. Double-click the object or right-click on the object and choose **Edit** or **Properties** from the menu to open the object for editing.

When you choose **Properties** from the menu, both the text fields and the property sheet for the question will open.

7.2.1. The Forms

Forms are the basic elements of the questionnaire. There are currently five standard types of form available:

- **Info** – Used for information pages in the survey.
- **Open** – An open-text question in which the respondent can type in his or her response.

- **Single** – Single-answer question. The respondent can select one answer from a list.
- **Multi** – Multi-answer question. The respondent can select several answers from a list.
- **Grid** – A question type that lets the respondent evaluate a list of variables along a scale.

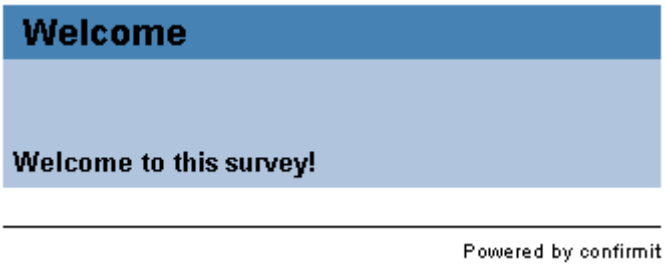


Figure 201 Example of an Information form

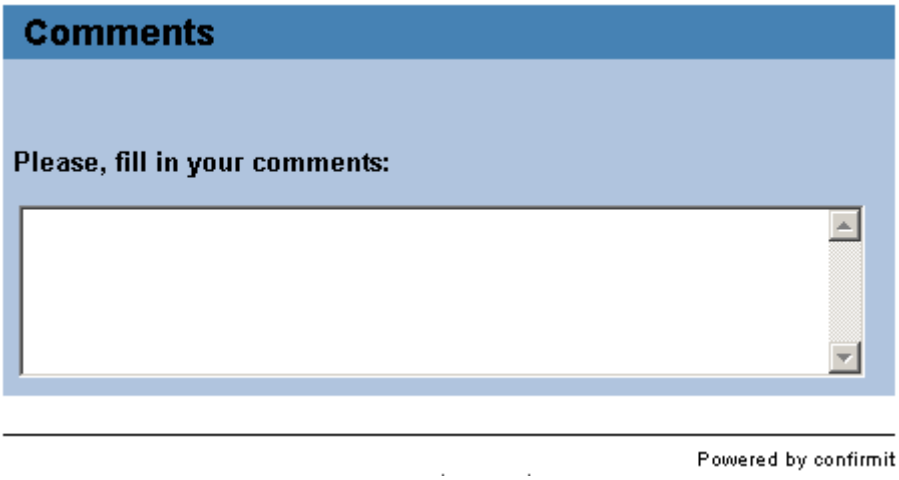


Figure 202 Example of an Open form

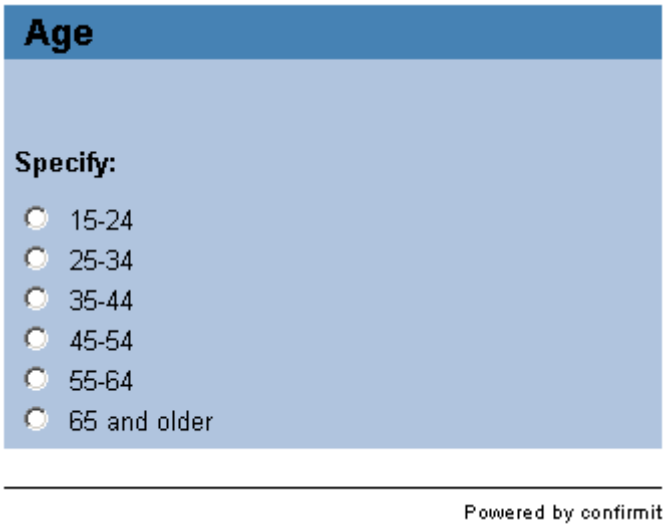


Figure 203 Example of a Single form

To convert a Single question to Multi question, right-click on the question and choose **Convert to Multi** from the menu.

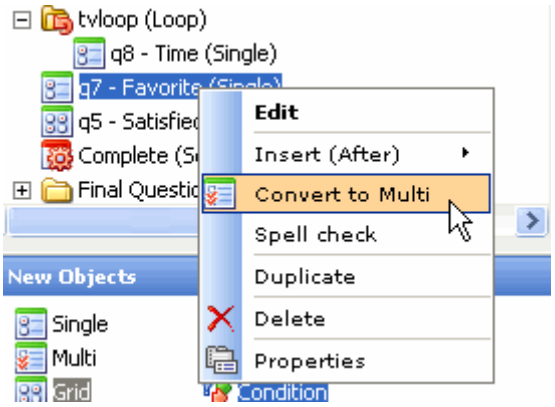


Figure 204 Converting to Multi

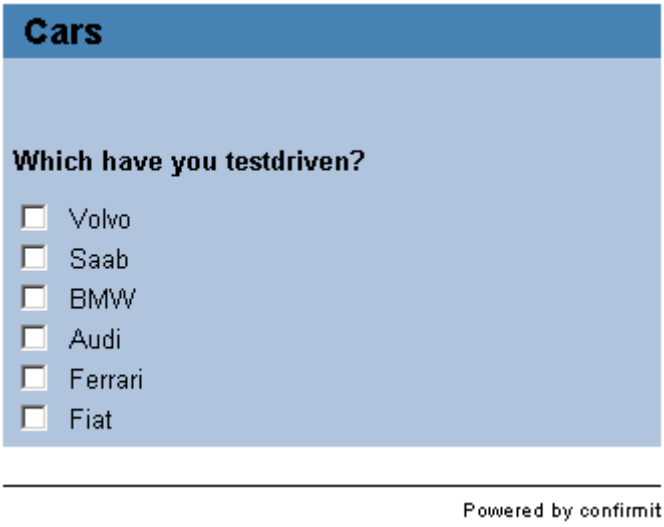


Figure 205 Example of a Multi form

To convert a Multi question to a Single question, right-click on the question and choose **Convert to Single** from the menu.

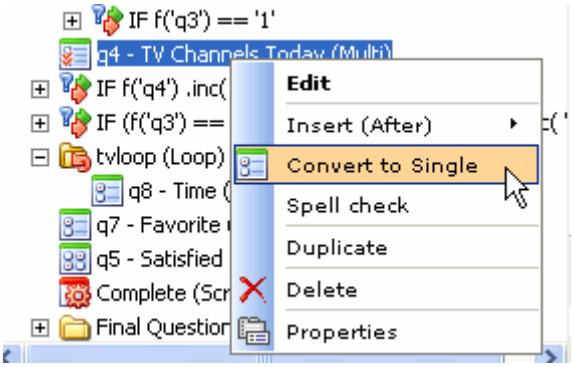


Figure 206 Converting a Multi form to a Single

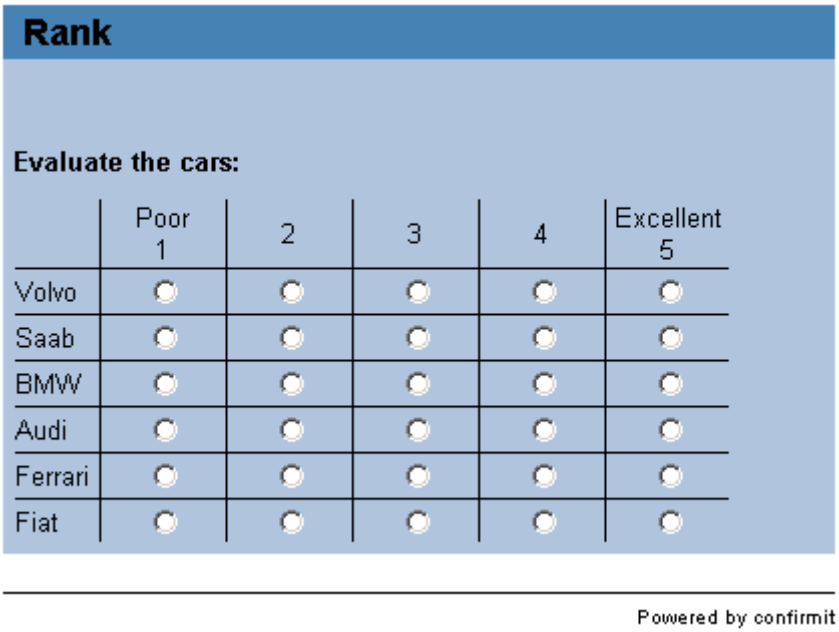


Figure 207 Example of a Grid form

7.2.2. 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.

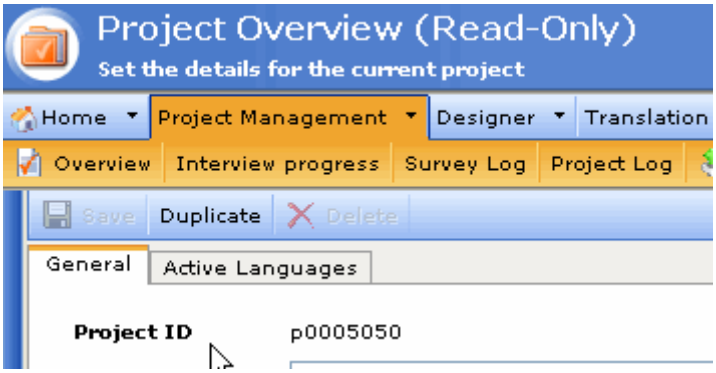


Figure 208 Example of the Overview page for a user with Read Only access

7.2.3. 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.

7.2.3.1. 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 (go to APPENDIX C: RESERVED KEYWORDS 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 precodes 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_precode 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 Ordered 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_precode of the answer alternative. The contents are the precodes 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_precode_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 (go to The Optimized Database Format on page 24 for more information), then question IDs and precodes (go to Precodes on page 155 for more information) cannot include the underscore character (_) (go to Underscore Character Not Allowed in Question ID on page 151 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 precodes, because column names are constructed as follows:

question id_precode

and this construction will quickly use up the 8-character restriction for column names.

7.2.3.1.1. Underscore Character Not Allowed in Question ID

When using the Optimized Database format (go to The Optimized Database Format on page 24 for more information), neither Question-IDs nor precodes are allowed to contain the underscore (_) character.

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 precode '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.

7.2.3.2. 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 section (go to Languages on page 160 for more information). Go to the Question and Answer Editing Modessection 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 on page 79 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 on page 79 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 on page 79 for more information)
Scratchpad	The scratchpad is a text editor, and is available in a number of the screens. If you paste text into the scratchpad, for example from a Word-file, you can then copy and paste extracts from 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.

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 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 (go to How to Include an Image in a Text Field on page 128 for more information). For the Answer tab text fields, you can drag-and-drop images directly from the File Library (go to How to Include an Image in an Answer Field on page 128 for more information). You can for example make a reference to an image by including the following tag in a text field's or an answer's cell:

<img src=" http://<URL_of_the_image>">.

To include a logo in a question when working in WYSIWYG editor, drag the logo into the text field or answer cell. You can also copy and paste the logo into the text field. In the figure below, the Confirmit logo has been dragged into the Text field of a question.

To delete an image or logo, click on it to select it (the frame grips appear as around the logo in the figure below), and press the **Delete** key on your keyboard

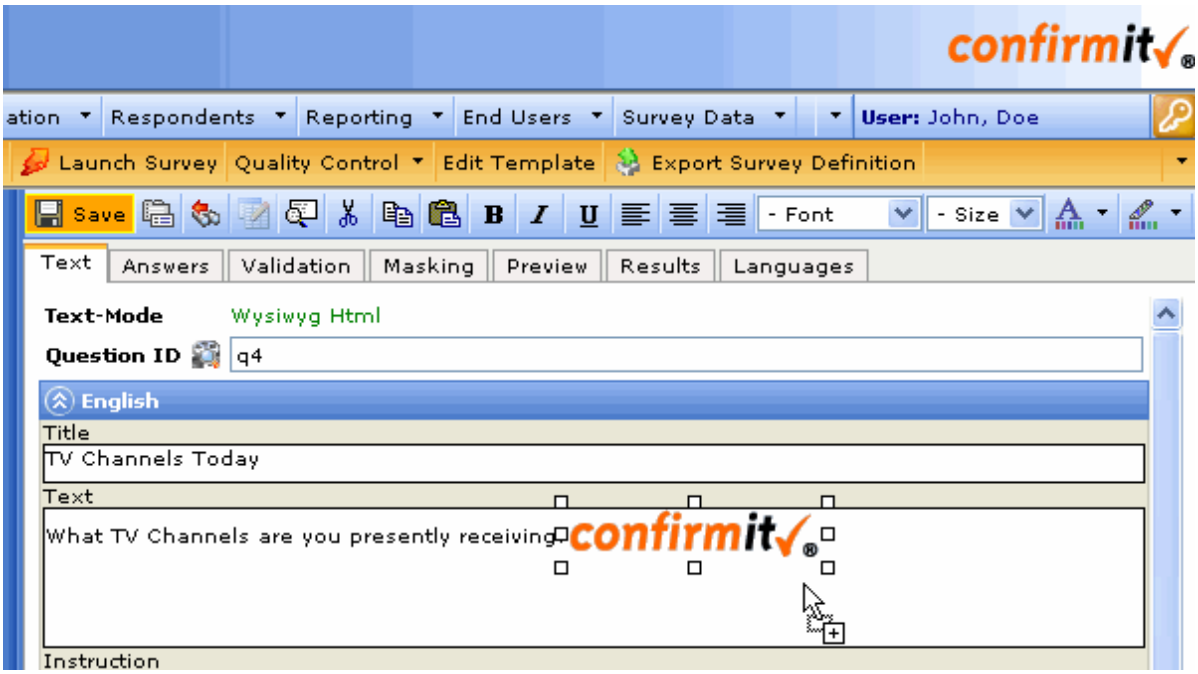


Figure 209 Dragging a logo into the text field

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.

7.2.3.3. 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 (go to The Optimized Database Format on page 24 for more information), then you can link an answer list from a loop into the question (go to Linking a Question to a Loop on page 156 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 *precode*, which is the underlying code stored in the database (go to Precodes on page 155 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 (go to Database Designer on page 234 for more information).

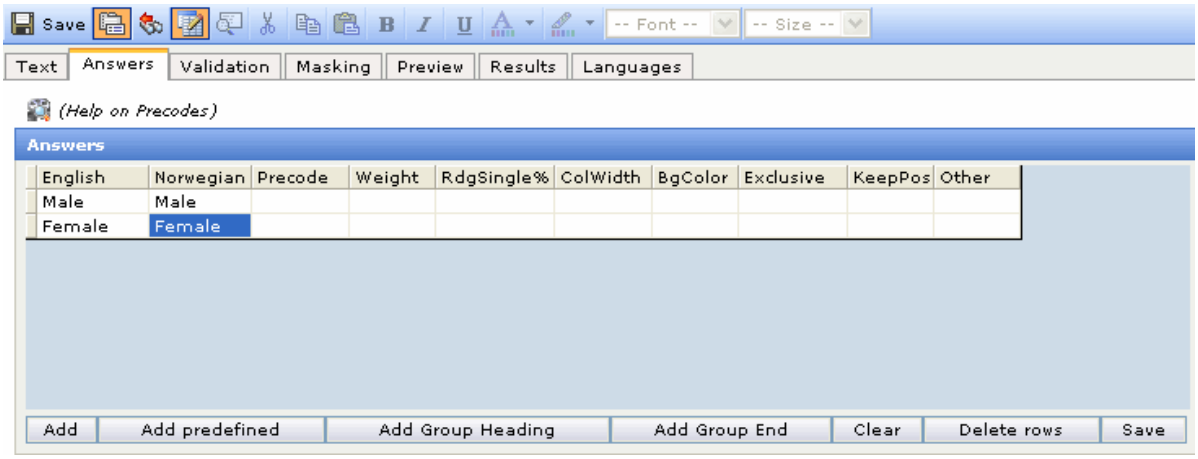


Figure 210 Example of an Answers page in FlexiGrid Component

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

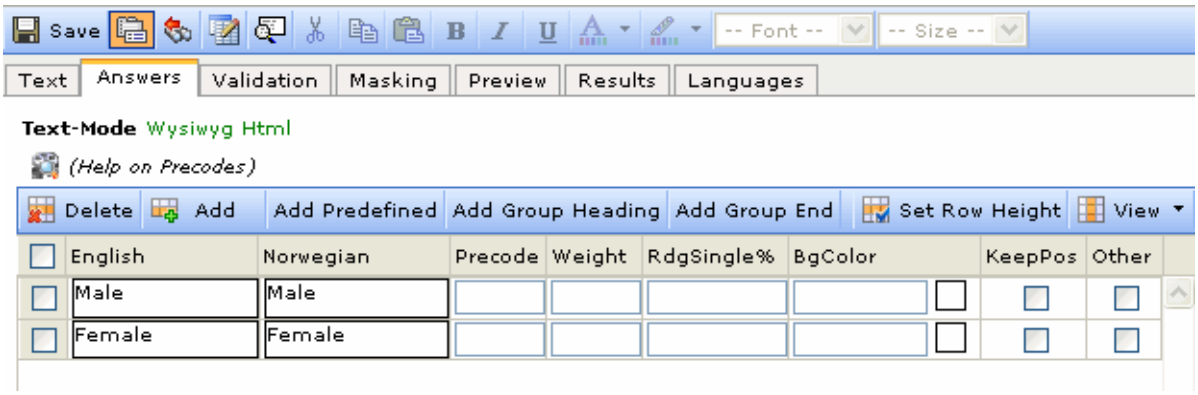


Figure 211 Example of the Answers page in DHTML input mode

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 (go to How to Use Images as the Answer Options on page 158 for more information).

If you are using the Optimized Database format (go to The Optimized Database Format on page 24 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 (go to Searchable Answer Lists on page 166 for more information). To do this, go to the Multi question's **Properties > Advanced WI Features** tab and check the **Searchable answer list** box (go to The Advanced WI Features Tab on page 164 for more information).

7.2.3.3.1. 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. Press the **Add** button to create a new answer 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-buttons 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 can copy entire answer lists from the scratchpad and paste them into answers. To do this, copy the list in the scratchpad (go to Scratchpad on page 191 for more information), go to the **Answers** in your question, click **Add**, single-click in the cell to activate it, and then paste the list.

The **Add predefined** button allows you to add a predefined list or scale to the answer list (go to Lists on page 165 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.

Use the **Add Group Heading** and **Add Group End** buttons to insert sub-headers in answer lists. For example, if you have a list of 12 elements and want to divide them into four groups, three elements in each, each with its own sub-header, do the following

1. Add a sub-header line by clicking the **Add Group Header** button.
2. Enter the sub-header text.
3. Enter the first three answer alternatives.
4. Click **Add Group End**.

Repeat the procedure for the next group. The result will be something like the picture below:

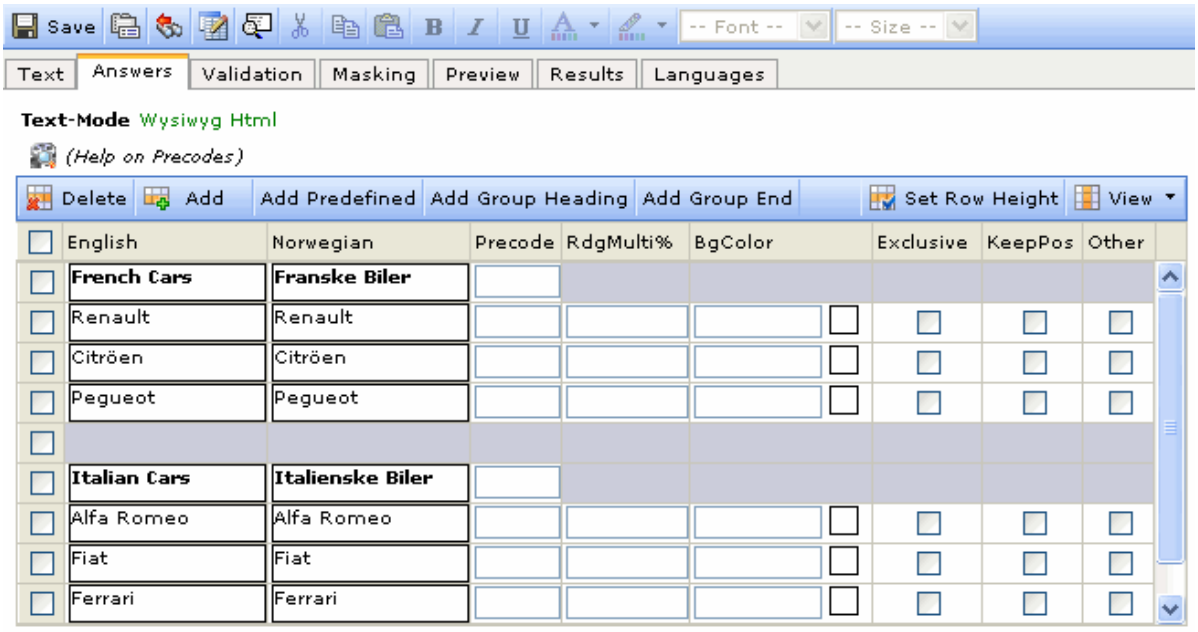


Figure 212 Adding Group Headings

You can also randomize, rotate, flip, and sort alphabetically the items in each group (go to Question Properties on page 160 for more information).

7.2.3.3.2. Precodes

When designing a questionnaire there is a virtually infinite number of options available for you to use as the answers to the questions. To simplify the data processing therefore, rather than using the "user-defined" question and answer texts, Confirmit allocates codes both to each question and to each answer option. The code for a question is the Question ID (go to Question ID on page 150 for more information), and the code for an answer option is the Precode. Each Question ID MUST be unique for the questionnaire, and each answer precode MUST be unique for a question.

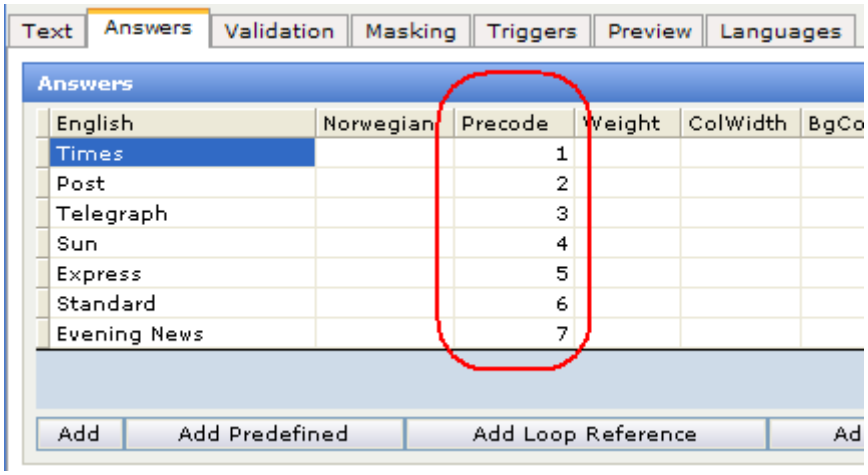


Figure 213 Examples of Precodes for the answers for a Multi question

For single questions and the items of a grid, the precodes are stored in the database as string values. For multi questions the precodes are used together with the Question ID as the variable name. For example a multi question q1 with three answer alternatives with the precodes 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 precodes to the answer options manually by typing the desired codes into the fields in the Precode column on the question's Answers tab. If a precode is not supplied manually, then one will be allocated automatically. This automatic precode will be equal to the answer's position in the list, starting from 1, but will not be visible in the Precode fields.

Important
If you change the answer list while a survey is running, you MUST ensure that the precodes follow the original answers.

Precodes 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 precodes - see the note below.

Note: In the database, the column headers are constructed as a combination of the question id and the precode, 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 precodes for grid and multi questions if the precode maximum has been increased above its default setting.

Note: When using the Legacy database format (go to The Optimized Database Format on page 24 for more information), the underscore (_) character can be used, though this is not recommended.

Important
For a question that includes a loop reference (go to Linking a Question to a Loop on page 156 for more information), any non-loop reference answers must be given precodes manually. These answers cannot be allocated precodes automatically as the loop reference will very likely cause duplicate precodes to be generated.

7.2.3.3.3. 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(go to The Optimized Database Format on page 24 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 (go to Loops on page 174 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**.

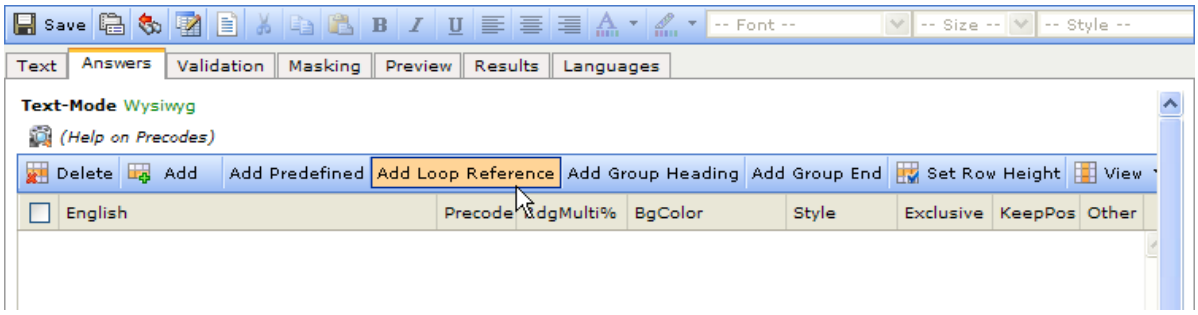


Figure 214 Adding a loop reference to a question's answer list

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

4. Click the down-arrow beside the answer field to open the drop-down list of the loops available, and select the desired loop from the list.

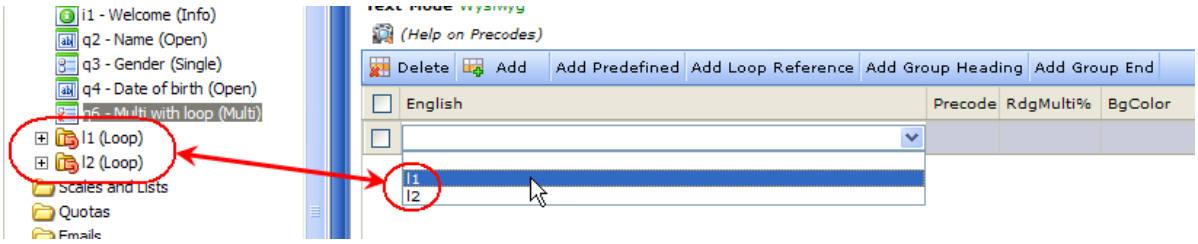


Figure 215 Selecting the desired loop from the list of those available

Note: The list will only include loops that are at the same level in the questionnaire as the question to which you are linking the loop. I.e. You cannot link to a "loop within a loop".

Important
A question can link to at most one loop. An error message will be displayed when you launch the survey if you attempt to link to more than one loop.

5. Add any other required answers in the normal manner.

Important
For a question that includes a loop reference, any non-loop reference answers must be given precodes manually (go to Precodes on page 155 for more information). These answers cannot be allocated precodes automatically as the loop reference will very likely cause duplicate precodes to be generated.

6. Save the changes.

7.2.3.3.4. 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(go to Languages on page 160 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.
- **Precode –** this is a code given to the particular answer option, which enables Confirmit to find and process the answers (go to Precodes on page 155 for more information). Each precode MUST be unique for a question, and each "Question ID and Precode" combination MUST be unique for the questionnaire.

Note: When using the Optimized Database format (go to The Optimized Database Format on page 24 for more information), precodes 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.
- **Weight –** A numeric value for the answer. Use this field to define the individual value/weight of each category. You must define values/weights to be able to calculate averages for the question in Online reporting. The average will only be calculated from answers with assigned values/weights. 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/weight of “Do not know” blank. The values/weights 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 (go to Random Data Generator on page 291 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 (go to HTML Styles on page 65 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 (go to How to Use Images as the Answer Options on page 158 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 (go to Question Properties on page 160 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 (go to Question Properties on page 160 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.

7.2.3.3.5. 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 (go to The Advanced WI Features Tab on page 164 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.

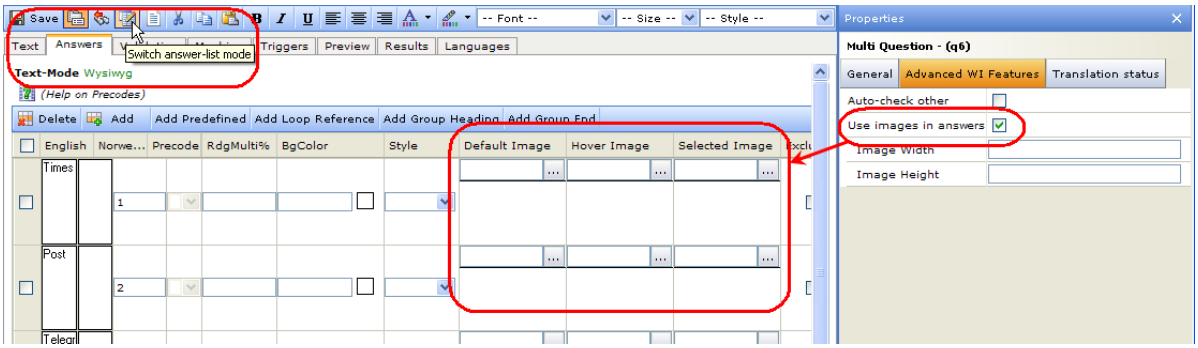


Figure 216 Using images in answers

   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 (go to File Library on page 123 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.

7.2.3.4. 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 (go to The General Tab on page 160 for more information). You can set the color of the border and fill for the bars in the Question Form Input Properties form (go to Scale Bar Label Style on page 56 for more information).

7.2.3.5. 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.

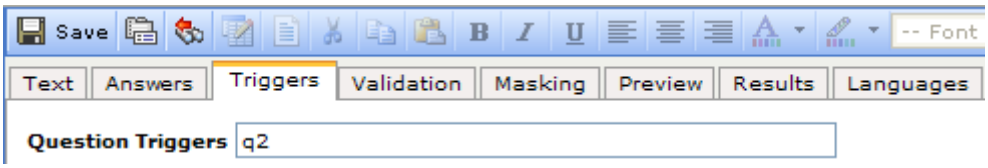


Figure 217 Example of the Triggers tab

Go to Dynamic Questions for further information.

7.2.3.6. Validation

For unlimited flexibility in question-validation, you can use JScript-code to validate your answers (go to Confirmit Scripts on page 270 for more information).

7.2.3.7. Masking

Depending on the object type, this tab can include one or more of the following masking fields:

- Precode 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 (go to Confirmit Scripts on page 270 for more information).

7.2.3.8. 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.

7.2.3.9. Results

This page displays the Rapid Results report for the current question (go to Rapid Results on page 386 for more information). Note the global database switch in Confirmit!

7.2.3.10. Languages

In a multilingual project, you may not want to work with all project-languages at the same time. This page lets you select a subset of languages to work in. Check or uncheck languages, and select another page.

7.2.3.11. Question Properties

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

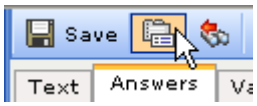


Figure 218 The Show/Hide Properties button

The properties pane opens in a new frame (go to Frames and Panes on page 13 for more information).

The properties available for a question depend on the question type. All the possible properties are listed in the following sections.

7.2.3.11.1. The General Tab

- **List Rows/Columns –** [Single, Multi, Grids] 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.

- **Field width –** [All] 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 Open] 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.

- **Other box rows –** 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 –** defines the number of columns for the 'Other' input box.
- **OpenText –** [Multi] Instead of checkboxes, open text boxes will be displayed. The Columns and Numeric properties will appear. The size of the text boxes is defined in Columns.
- **Numeric –** [Open, Multi with OpenText selected]. If “Numeric” is selected, then the following input fields will be displayed:
  - “Total digits” (integer 0<p<=28. Specifies the maximum total number of digits that can be stored, both to the left and to the right of the decimal point).
  - “Decimal places” (integer 0<=s<=p. Specifies the maximum number of decimal digits that can be stored to the right of the decimal point.).
  - “Lower limit” (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 “<=”.
  - “Field width” is now not available, because “Total digits” replaces it.

  For a Multi with the OpenText selected (in Properties you choose Open Text). The Numeric flag will be displayed. Choose the Numeric property. The Total digits, Decimal places, Lower limit and Upper limit fields will be made available.), the same “Total digits”, “Decimal places”, “Lower limit” and “Upper Limit” will be applied to all fields.

- **Ranking –** [Multi, Grid] Check this flag if you wish the generator to produce code that ensures that the inputs in Multi Ordered questions and Grid questions are unique and consecutive for each alternative in the list.

  In Multi questions, you can combine this choice with OpenText option. The data input boxes will be placed after the text.

- **Opentext coding –** [Multi] Check this flag to specify that this Multi question will be used for coding of an Open-Text question. Remember to check hidden, too! (go to Online Coding Tool on page 374 for more information).
- **Answer Column Width –** [Grid] Defines a specific width, in pixels, of the answer column in grids.
- **Rows/Columns –** [Open, Multi] You can control the size of Open question boxes. The default size Rows = 5 and Columns = 50. The open-ended questions may appear as text areas or as single line input boxes. The "open text" object has got two properties: "Rows" and "Cols". Rows = Height (number of lines), Cols = Width (number of characters). To produce a single line input, set "Rows" to 1.

  In Multi questions with the OpenText option, you can specify the field width in Columns (the default is 30 characters). The Columns option does not appear until you select OpenText and after you save.

- **Password –** [Open] 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.

- **Answers –** [Single] Choose between using a “Normal answerlist”, setting up the answer texts and precodes in the answers tab (go to Answers on page 153 for more information) or getting the answer from table(s) set up in “Database Designer” either as “Table lookup” or “Hierarchy lookup”. Read more about this functionality in chapter (go to Database Designer on page 234 for more information).) This functionality is an add-on to Confirmit, so it may not be enabled for your company.
- **Answer list/Scale/ display order –** [Available in Single, Multi, Grid] These properties control the display order of the answer list [Single, Multi, Grid] and scale [Grid]. The items can be displayed:
  - **In order –** in the order that they appear in the list.
  - **Randomized –** in pseudo-random order.
  - **Rotated –** the list is shifted and rotated by one position for each new response.
  - **Flipped -** will alternate between displaying the list top-bottom or bottom-top for different respondents.
  - **Alphabetically sorted -** will sort the list alphabetically based on the labels (in the current language).

  When the answer list contains Group headings, the Answer list display order controls the order in which the items inside each group are displayed. If the list does not contain any Group heading items, then the Answer list display order controls the order of all the items in the list.The order of the groups is controlled by the Group display order.
- **Group display order –** [Available in Single, Multi, Grid] These properties control the display order of the answer list elements in a subgroup, i.e. when Group Headers have been used. The items can be displayed:
  - **In order –** in the order that they appear in the list.
  - **Randomized –** in pseudo-random order.
  - **Rotated –** the list is shifted and rotated by one position for each new response.
  - **Flipped -** will alternate between displaying the list top-bottom or bottom-top for different respondents.
  - **Alphabetically sorted -** will sort the list alphabetically based on the labels (in the current language).

  When the answer list contains Group headings, the Group display order controls the order in which the groups are displayed. The items inside each group are controlled by the Answer list display order. If the list does not contain any Group heading items, then the Answer list display order controls the order of all the items in the list.
- **Variable type**
  - **Normal –** An ordinary question object.
  - **Hidden –** [Single, Multi, Open, Grid] A hidden form ("dummy question") is hidden from the interviewer/respondent, i.e. it is never displayed, but 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.
  - **Background –** [Single, Multi, Open] 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. Very useful when you have information about your respondents, which you want to apply in the skipping-logic of your questionnaire, or in the Online reporting. A column with a name equal to the form-ID is required in the respondent list (go to Handling Respondents in Limited Surveys on page 322 for more information).
  - **Recoded variable –** [Single, Multi, Open] 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 (go to Recoding Data on page 469 for more information)
  - **Panel variable –** Treat this form as a Panel variable. Panel variables are by default hidden (go to Basic Panels on page 356 for more information).
- **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] Will appear once “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”.
- **Boolean** - [Only for 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.
- **Not required –** [All] Normally, all questions require an answer if you have checked off the option Answer Required in Survey Settings (go to Preparing for Data Collection on page 302 for more information).

  Check this flag to turn off this validation for the particular question.

  Ordinary Multi questions are by default not required. Multi questions with a single punch item will be required as long as the default exclusivity validation is used.

  [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] check to include the responses to the open-text question in the BitStream file. 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.

  Date - [Only for Optimized db, Open text] if the question is to ask for a date, check this box to define the input as a date and include a date picker with the data input field. The date picker will simplify the user's selection of dates. The date format in the Optimized db automatically follows the convention used by the language selected by the user, but will also recognize other formats and inputs such as "Today", "Tomorrow", "July 2008", "Next Friday", "Last April", "+5years" etc.
- **Indexed –** 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 that 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.
- **Coding of –** [Multi with Opentext coding selected] Here you specify the Question ID of the Open-Text question that will be coded in the Multi question (go to Online Coding Tool on page 374 for more information).
- **Level –** [Single, Multi, Open with Recoded var] Defines the order in which the recoded variables will be calculated.
- **Read only –** This property can be 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.
- **Repeat Headers –** When this property is selected, the grid headers will be repeated for every N rows. N is the number of repetitions specified in the Header Frequency property.
  - **Header Frequency –** appears when Repeat Headers is selected. When using Repeating Headers, this property specifies the number of rows between headers. For example with Header Frequency set to 10, you would get a row of headers, then 10 data rows, headers again, and then more data rows.
- **Bottom Headers –** When this property is selected, the grid headers are also shown at the bottom of the grid.
- **Left and Right Grid Text –** 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.

- **Force Number of Items –** [Multi] You can force respondents to select a specific number of answers, define the minimum number of answers, and define the maximum allowed number of answers.
  - **Equal to -** This property is used to specify the exact number of answer items to be selected by a respondent taking the interview. Here you must take into account the number of answer items available, especially when using masking.
  - **Min -** This property is used to specify the minimum number of answer items to be selected by a respondent taking the interview. Here you must take into account the number of answer items available, especially when using masking.
  - **Max -** This property is used to specify the maximum number of answer items to be selected by a respondent taking the interview.
- **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 (go to Scale on page 159 for more information). This allows you to add for example a “ramp” above the scale columns to illustrate the value of the scale.
- **Exclude Translation –** Allows you to exclude certain questions from the translator interface (go to Translator on page 255 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*(go to Editing the Routing on page 190 for more information), you can undelete the object by unchecking this flag.

7.2.3.11.2. 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 (go to Searchable Answer Lists on page 166 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 (go to Global button images on page 316 for more information). For the Button images field, three options are available:
  - **Global Images –** a default value. The image URLs that are specified on the **Survey Settings > Layout** page will be used(go to Global button images on page 316 for more information).
  - **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).
  - **Custom Images –** this setting overrides the setting from the **Survey Settings > Layout** page, and allows you to specify image URLs for this specific question. When you select this option, additional input fields become available to enable you to input the URLs to the desired images (see below).
- **Image URLs –** These fields appear only when **Custom Images** is selected. Enter the URLs of the images you wish to be used instead of the standard radio buttons and .
  - **Default –** this image will be displayed when the mouse pointer is not over the image area and an answer alternative is not selected.
  - **MouseOver –** this image will be displayed when the respondent points the mouse at the button image.
  - **Selected –** this image will be displayed once the respondent has selected an answer alternative.
  - **Width, Height –** define the width and height of the images, in pixels.

Note: To ensure that any images used here are always available, you are recommended to store the images in the File Library (go to File Library on page 123 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:
  - Automatically switches on the radio button/checkbox when the respondent types text in the other-specify field

  - Automatically switches off the radio button/checkbox when the respondent clears the text from the other-specify field
  - Saves the text of the other-specify field when the respondent switches off the radio button/checkbox, displaying the text again when the radio button/checkbox is re-activated

- **Drag-n-Drop ranking –** [Multi Ordered] This feature enables drag-and-drop functionality for the rank order questions. Note that if a Maximum or Equal value is specified for the question, only the allowed number of drop locations will be displayed.
- **Auto sum –** [Multi Open Text Numeric] This feature will automatically summarize the answers in a numeric question.
- **Scrollbar –** [Grid, 3D Grid] This feature will enable the respondent to scroll long grids without loosing sight of the column headers.
  - **Off –** This is the default, and means that the feature is turned off
  - **Automatic –** This means that Confirmit will automatically assign an appropriate height to the grid
  - **Fixed –** This enables the survey author to specify the height of the grid in pixels.
- **Slider –** [Single, Numeric, Grid] 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 (go to Question Skins on page 51 for more information).

Note: In surveys using "Survey Layouts",“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. In surveys using "WI Templates", these features are supported in IE6 and IE7 (Windows). Respondents using other browsers will see the standard Confirmit survey interface, with "normal" radio buttons.

- **Card Sort** - [Grid] 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 (go to Question Skins on page 51 for more information).
- **Use Images in Answers** - [Single, Multi, Grid if "Custom Images" (see above) is not selected] Check this box to use images for the answer options, instead of buttons or selection boxes (go to How to Use Images as the Answer Options on page 158 for more information). Checking this box opens two further options:
  - Image Width - Specify the width of the image used.
  - Image Height - Specify the height of the image used.

7.2.3.11.3. 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.

7.2.3.12. 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 (go to Answers on page 153 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 list, either drag a Scale/List object from the **New Objects** folder to the **Scales and lists** folder, or select **Scale/List** from the **Insert** menu. This will create a new list in the **Scales and lists** folder. Double-click the list to edit its properties.

- **Name** - A descriptive name for the list. The list-name is the text that is displayed in the drop-down list when inserting the predefined-list in another form or list. Note: List/Scale name cannot contain Unicode characters.
- **Answers** - The answer-list behaves like the list in forms and loops (go to Answers on page 153 for more information).

- **Scratchpad** - The scratchpad is a text editor available in several screens. If you paste text into the scratchpad, for instance from a Word-file, you can easily copy and paste 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.

7.2.3.13. Searchable Answer Lists

Note: This functionality is only available when the Optimized Database format is selected (go to The Optimized Database Format on page 24 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 (go to The Advanced WI Features Tab on page 164 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):

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.

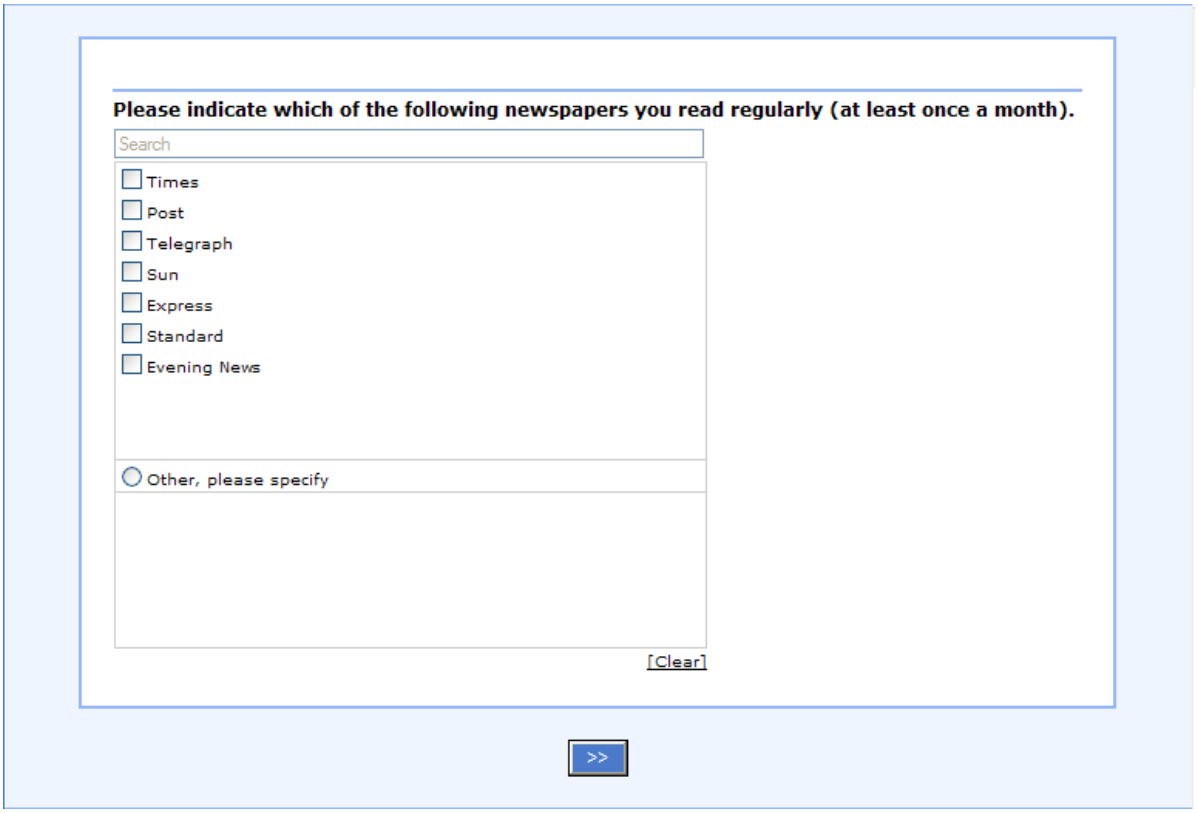


Figure 219 Example of an answer list with the Searchable property activated

The respondent can start to type the first characters of the desired answer into the Search field, and the answer list will reduce to include only those answers that correspond to the characters typed. In this example the respondent has typed the letter "t" into the search field, so all answers that do not start with the letter "t" have been removed from the list .



Figure 220 The answer list reduces as characters are typed into the search field

When the list is reduced enough that the respondent can find the desired answer easily, he/she can select that answer and it will be copied to the Selected field below the answer list.



Figure 221 An answer is added to the Selected Answers field

The respondent can then return to the search field, clear it and type in new search characters to find more answers as required.

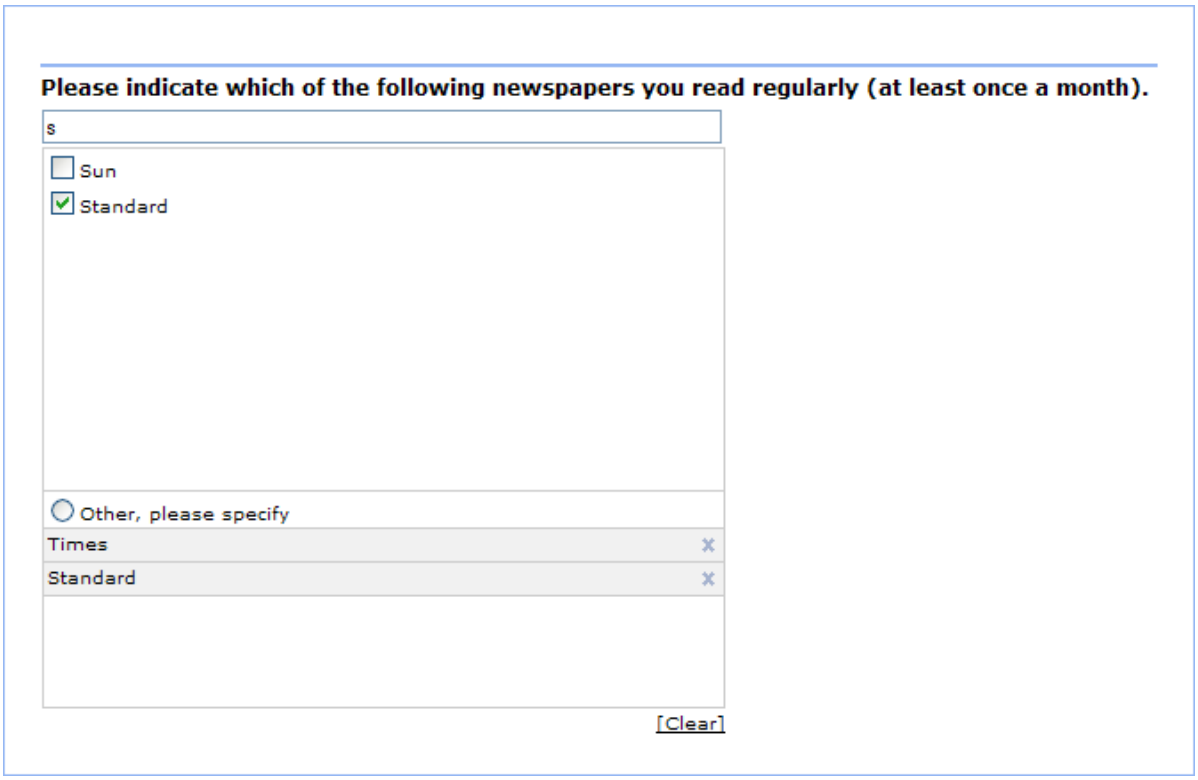


Figure 222 Finding further answers using other search characters

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.

7.2.4. 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.

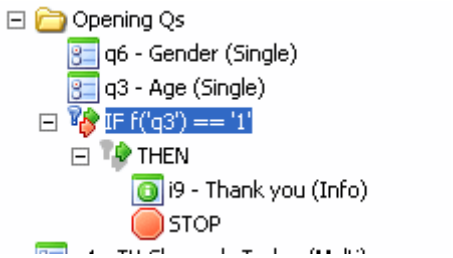


Figure 223 A Conditional node

The expressions in the IF condition are written using JScript (go to Confirmit Scripts on page 270 for more information). To help to build expressions Confirmit has included a Condition Builder tool (go to Condition Builder on page 169 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.

7.2.4.1. Description of Fields

- **Expression –** a JScript-expression evaluating to *true* or *false* (go to Confirmit Scripts on page 270 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* (go to Editing the Routing on page 190 for more information), you can undelete the object by unchecking this flag.
- **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: The default setting for this property (checked or unchecked) can be set at the company level by the system administrator.

7.2.4.2. Condition Builder

The Condition Builder helps you to build JScript expressions.

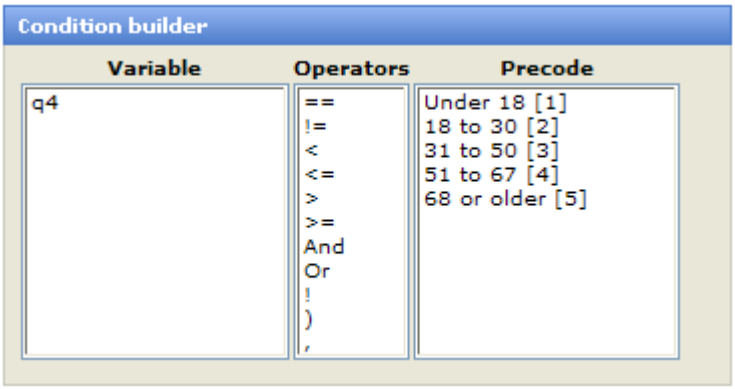


Figure 224 Example of the Condition Builder

To use the condition 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.
2. Single-click on a form in the routing-tree that you want to base your expression on (Double-clicking will activate form-edit mode).

   The condition builder for the chosen form opens. The condition builder consists of three lists:

   - **Variable** - This list will show the form-ID of the selected form. If the form is a grid, each of the answers in the grid (which are themselves single-punch questions) will be shown. Click on an item in the list to insert a reference to the form in the expression-field.
   - **Operators and methods** - This list includes most of the operators and methods you can apply to the form-object in focus. The list will be different for each type of form, because the various form-types support different methods. Click on an item in the list to insert the operator or method into the expression-field.

- **Precode** - This list will show the answers of the selected form, with the precode in square brackets. Click on an item in the list to insert the precode into the expression-field.

In combination, these lists make it easy to build complex expressions without remembering the JScript-syntax. You may at any time single-click another form in the routing to expand your expression to be based on more than one form.

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 not correct syntax:

IF f(‘q3’) == ‘1’ || ‘2’ THEN…

Note: You can see from the expressions above that the precodes 1 and 2 have apostrophes before and after. This is because the "precodes", 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 a condition with greater than or less than you should convert the precodes 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 (go to Confirmit Scripts on page 270 for more information).

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

7.2.5. Directives

Directives contain instructions to the WI generator. Four different directives exist, which are used to control page break insertion and progress bar end points. By default, a Directive will be set to Multiple questions per page.

- **Multiple questions per page** - Attempts to group as many questions on a page as possible.
- **One question per page** - One question per page, i.e. a page break will be inserted after each question.
- **Progress bar begin** - Starts a new progress bar.
- **Progress bar end** - Defines the end point of a progress bar.

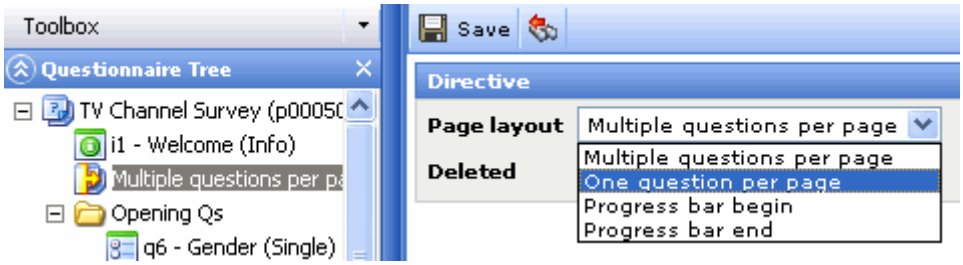


Figure 225 Selecting a Directive

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.

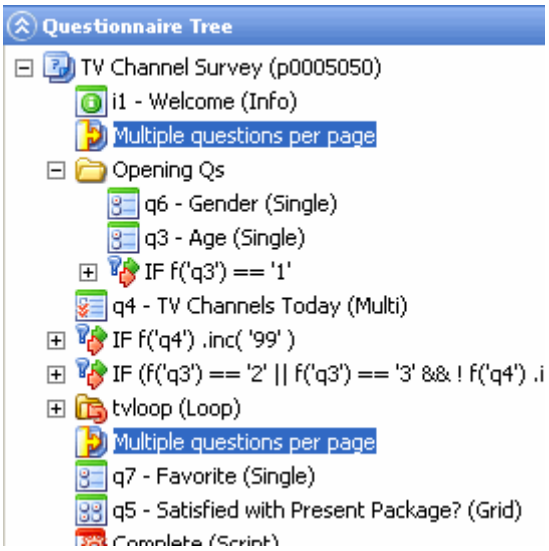


Figure 226 Example of a multiple questions directive

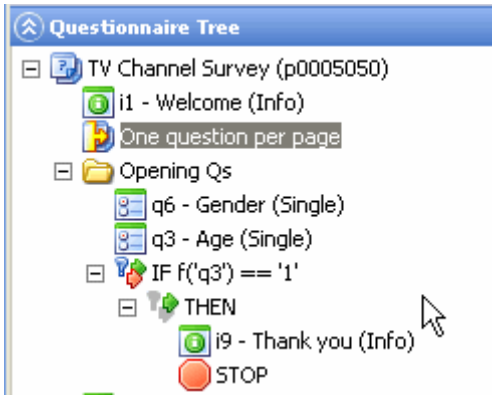


Figure 227 Example of a single question directive

Progress bars are displayed if the Web interview is generated with the progress bar option. 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 end points. If a survey contains no progress bar directives, then the progress bar endpoints 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.

7.2.6. Stop-objects

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. The status-code you set on the Stop-object is important:

- **Complete** - The web interview should be considered a complete interview. The respondent data status is set to "Complete", and the end time of the interview is registered. Normally, online reporting will only show statistics for complete interviews.
- **Screened** - Use this status-code to mark the interview as "Incomplete due to screening". The respondent data status is set to "Screened" and the end time is set.
- **Quota full** - The interview is stopped for a certain group of respondents due to a full quota (go to Quotas on page for more information).

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 (go to Preparing for Data Collection on page 302 for more information).

The title and the status set on the stop node will be displayed in the questionnaire tree in the same ways as question IDs and titles are displayed. The message presented to the respondent can be presented in the selected language if it is translated in the node fields.

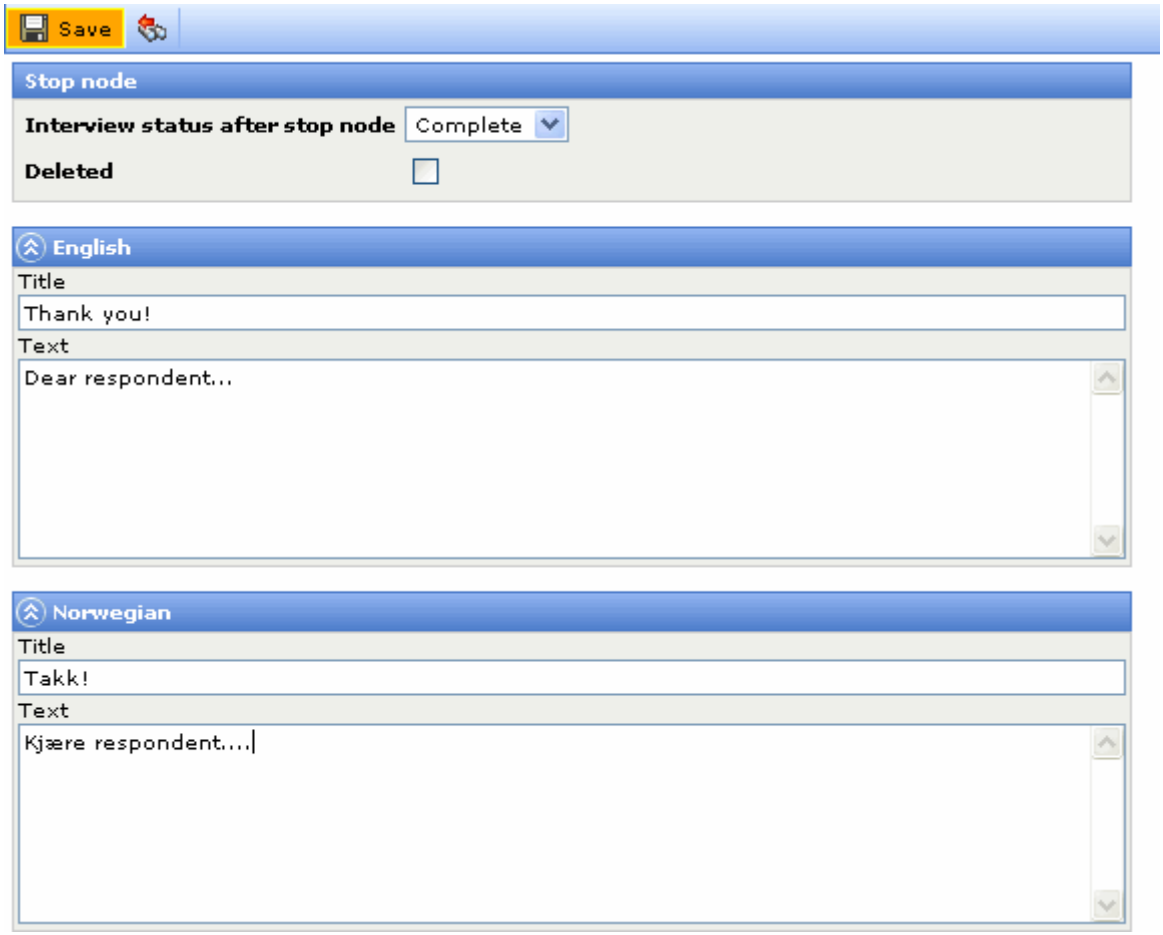


Figure 228 Editing the text in a STOP node

7.2.7. Scripts

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 your 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 (go to Confirmit Scripts on page 270 for more information).

7.2.8. 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 (go to The Optimized Database Format on page 24 for more information), then you will be able to use the loops as answer lists in other questions.

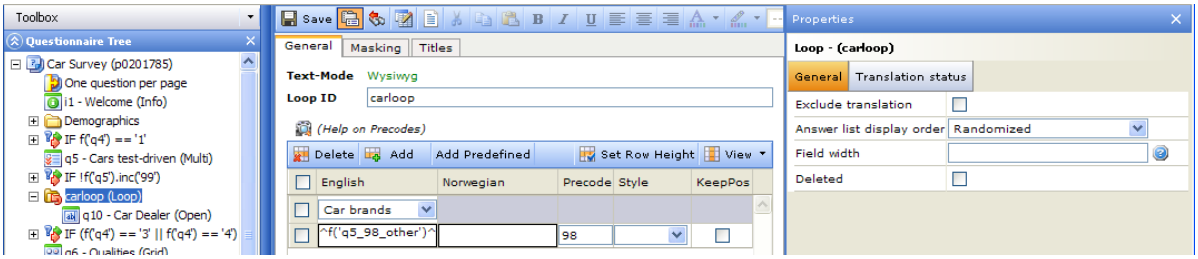


Figure 229 Loops

7.2.8.1. 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 case-sensitive).
4. Create a list of loop-iterations in the same way as you would create an answer list in a form (go to Answers on page 153 for more information).

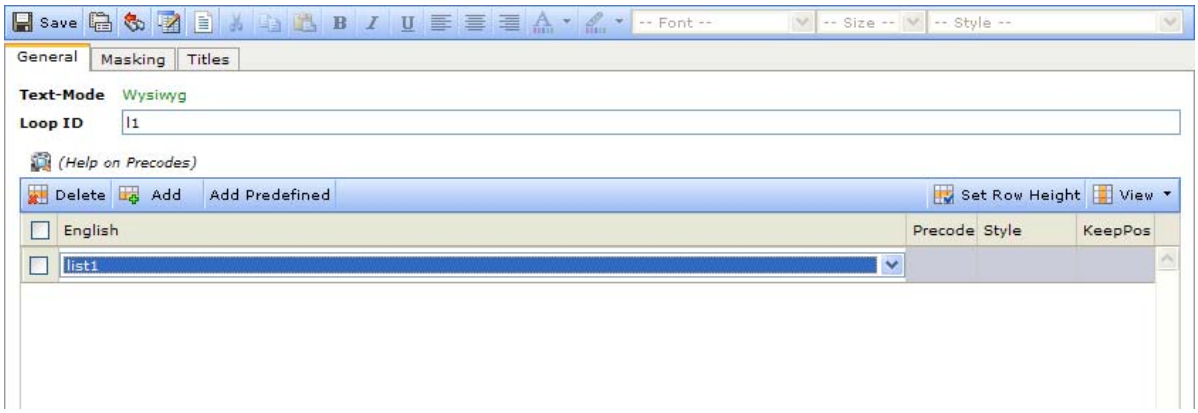


Figure 230 Example of the Loop Details page in DHTML mode

5. If required, apply masking such that the loop only operates under specified conditions (go to Masking on page 160 for more information).
6. Open the loop's Properties page and set the properties as required (go to The Loop Properties Page on page 176 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.

7.2.8.2. 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 case-sensitive).
4. Open the loop's Properties page and select the type of answers that you wish to use (go to The Loop Properties Page on page 176 for more information).

Note: When the Optimized Database format is selected for the questionnaire, you can select between Normal answer list and Table Lookup (go to Using Table or Hierarchy Lookups in the Questionnaire on page 251 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 (go to Hitlists on page 478 for more information), 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 (go to Answers on page 153 for more information), then save the changes.

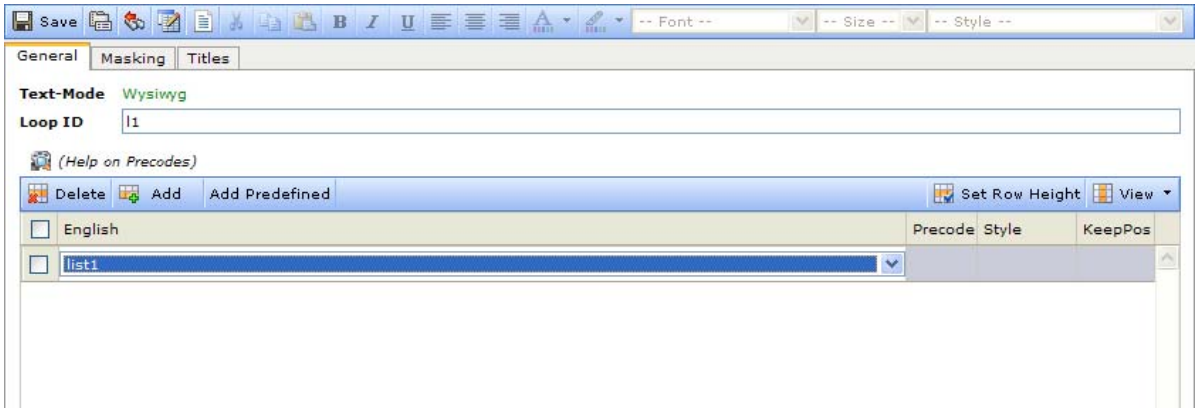


Figure 231 Example of the Loop Details page in DHTML mode with Normal Answer List selected

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

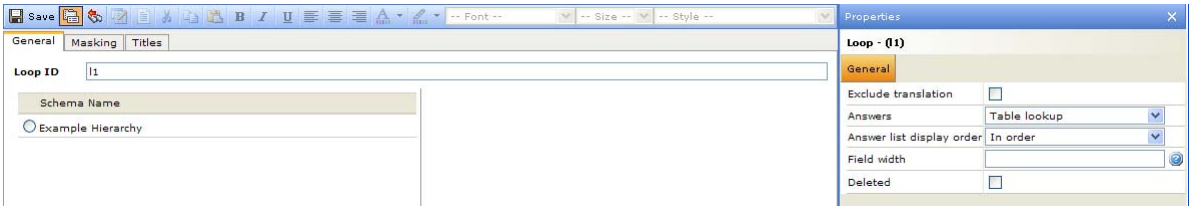


Figure 232 Example of the Loop Details page when Table Lookup is selected.

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 (go to Masking on page 160 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.

7.2.8.3. 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 (go to Languages on page 160 for more information).
- **Precode** - defines the precode of the iteration. If a precode is not supplied, the precode will be equal to the position in the list, starting from 1. Precodes 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 (go to APPENDIX A: LIMITS on page 608 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 (go to HTML Styles on page 65 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 precodes to include or exclude (go to Precode and Scale Masks /Filtering Answer Lists/Scales on page 277 for more information).

7.2.8.4. The Loop Properties Page

The properties available for loops are as follows:

- **Exclude Translation –** Allows you to exclude certain questions from the translator interface (go to Translator on page 255 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 either Normal Answer List (default) or Table-lookup as answers for the loop.

- **Answer list display order** - this property controls the order that the list items appear in:
  - **In order** – in the order that they appear in the list.
  - **Randomized** – in pseudo-random order.
  - **Rotated** – the list is shifted and rotated by one position for each new response.
  - **Flipped** - will alternate between displaying the list top-bottom or bottom-top for different respondents.
  - **Alphabetically sorted** - will sort the list alphabetically based on the labels (in the current language).

  Any answer alternatives that have the KeepPos property set to **Yes** will keep their original position in the list.
- **Field width -** the number of characters assigned to the iteration precode 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*(go to Editing the Routing on page 190 for more information), you can undelete the object by unchecking this flag.



Figure 233 The Properties list for the Optimized Database format

7.2.9. 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 punch question.
- Multi punch question/Multi punch question with Open Text or Ordered property.
- Grid question/Grid question with Ordered or Drop-down property.

7.2.9.1. 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 routing.

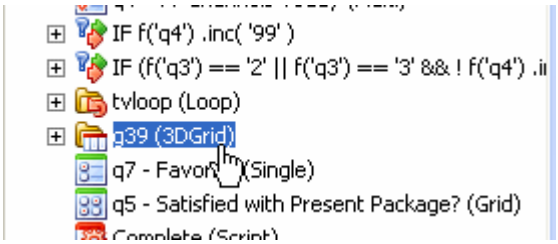


Figure 234 A 3D grid in the questionnaire

The 3D-Grid properties are as follows:

- **Question ID** - the project-unique ID of the form (questions). An alphanumeric string with no white space, starting with a letter. This is automatically generated. You may replace the system-generated ID with your own. Note that the maximum length for question IDs is 50 characters. You must not use reserved keywords as Question IDs (go to APPENDIX C: RESERVED KEYWORDS on page 615 for more information).
- **Masking** - used for filtering answer lists based on answers on previous questions. If you want to dynamically exclude one or more of the answers in the answer list, use this field to create a JScript-expression resulting in a set of precodes to be included (go to Confirmit Scripts on page 270 for more information).
- **Answer column width** - defines a specific width, in pixels, of the answer column in the 3D Grid.
- **Answer list/Column/ display order** - these properties control the display order of the answer list and columns of the 3D grid. The items can be displayed:
  - **in order** – in the order that they appear in the answer list or 3D grid definition.
  - **randomized** – in pseudo-random order.
  - **rotated** – the list is shifted and rotated by one position for each new response.
  - **flipped** - will alternate between displaying the list top-bottom or bottom-top for different respondents.
  - **alphabetically sorted** - will sort the list alphabetically based on the labels (in the current language).
  - The answer alternatives that have KeepPos property set to Yes, will keep their original position in the list.

  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 -** [Available in Single, Multi, Grid] These properties control the display order of the answer list elements in a subgroup, i.e. when Group Header have been used. The items can be displayed:
  - **In order** – in the order that they appear in the list,
  - **Randomized** – in pseudo-random order, or
  - **Rotated** – the list is shifted and rotated by one position for each new response.
  - **Flipped** - will alternate between displaying the list top-bottom or bottom-top for different respondents.
  - **Alphabetically sorted** - will sort the list alphabetically based on the labels (in the current language).

  When the answer list contains Group headings, the Group display order controls the order in which the groups are displayed. The items inside each group are controlled by the Answer list display order. If the list does not contain any Group heading items, then the Answer list display order controls the order of all the items in the list.
- **Not required** - normally, all questions require an answer if you have checked off the option Answer Required in WI Generator (go to Generating Interview Files on page 309 for more information).
- **Deleted** - 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* (go to Editing the Routing on page 190 for more information), you can undelete the object by unchecking this flag.
- **Keep position** - for items in 3D Grid. If this property is chosen the item will keep its position in 3D Grid when Column display order is set to be randomized, rotated, flipped, or alphabetically sorted.

Note: You can set other properties for the grid. 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 (go to How to Highlight Error Cells on page 179 for more information).

7.2.9.2. 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 (go to The Forms on page 147 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.

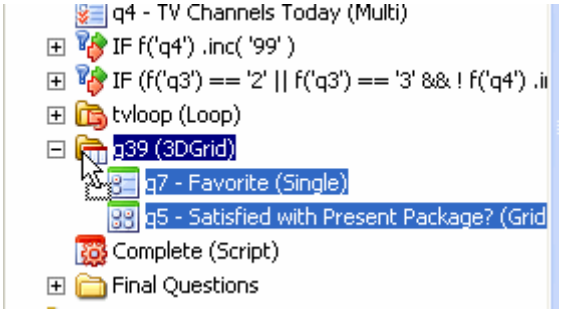


Figure 235 Dropping Items Into a Folder

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.

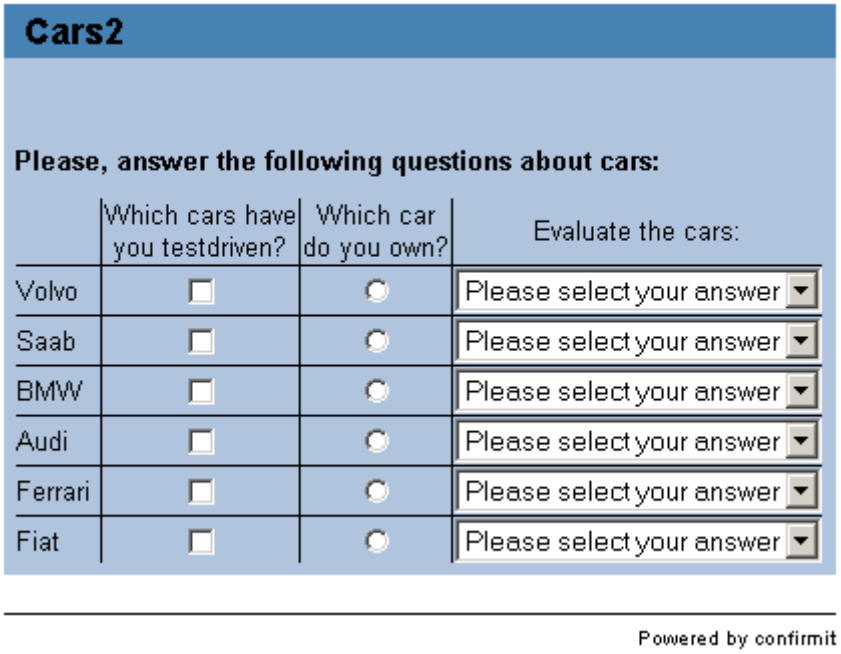


Figure 236 A 3D grid object in a survey

7.2.9.3. 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.

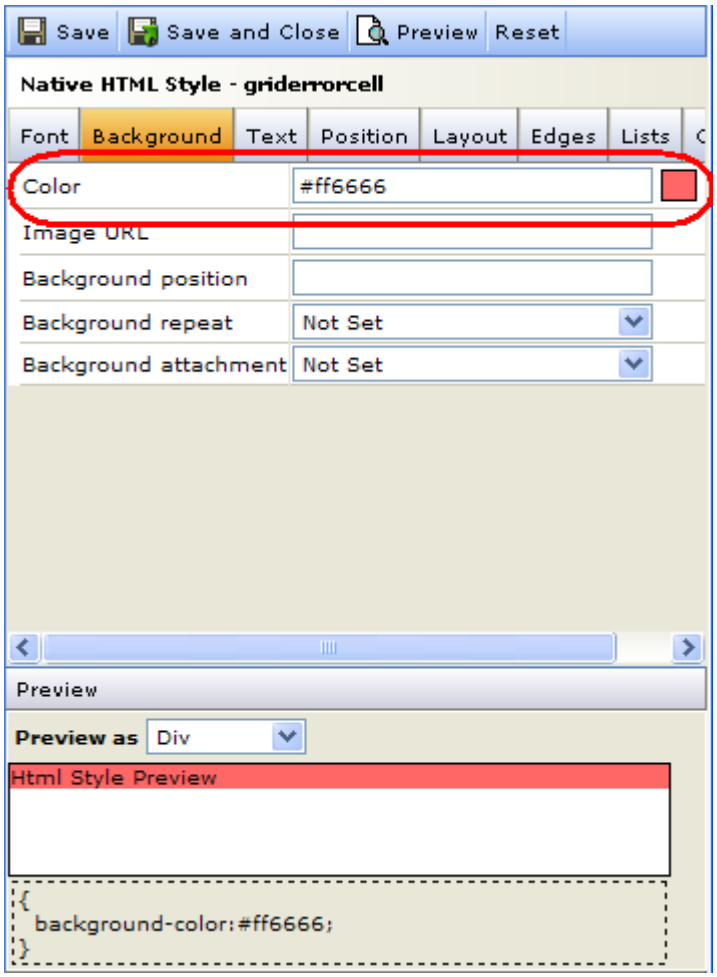


Figure 237 Setting the background color for the style

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 (go to Shortcut to Style Editing on page 67 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.

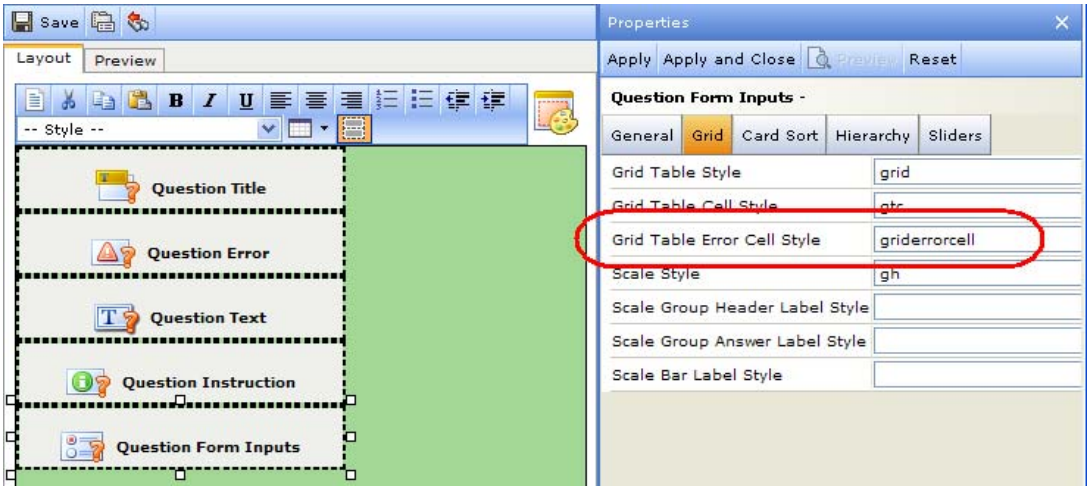


Figure 238 Specifying the Grid Table Error Cell Style

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.

7.2.10. 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).
  - 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.
  - 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.

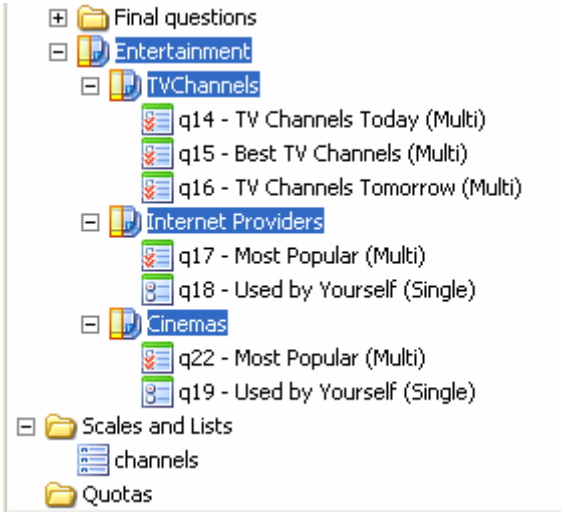


Figure 239 Blocks within blocks

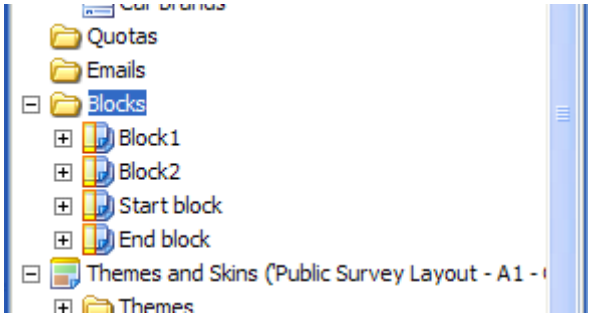


Figure 240 The Blocks folder in the questionnaire tree

Any number of "external" Blocks can be added to the routing (go to How to Create a Block on page 183 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 (go to Use of Background Variables on page 322 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 (go to The Optimized Database Format on page 24 for more information).

7.2.10.1. 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.

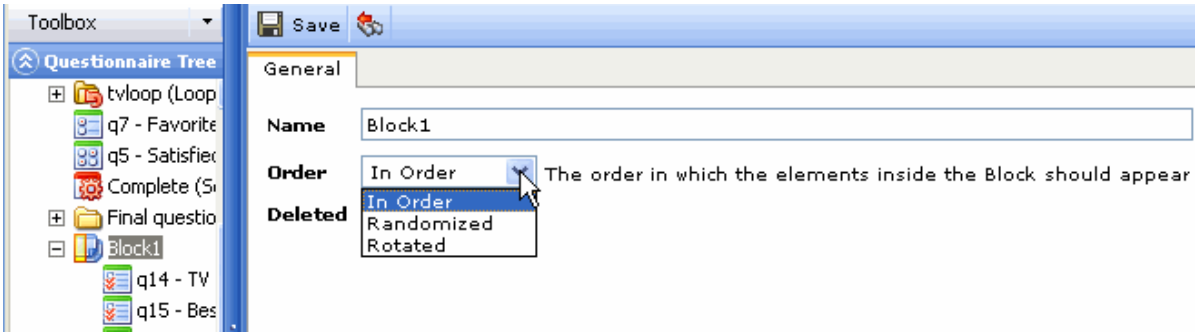


Figure 241 Setting up a Block object

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.

7.2.10.2. How to Create a Block

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 (go to How to Create a CallBlock on page 184 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.

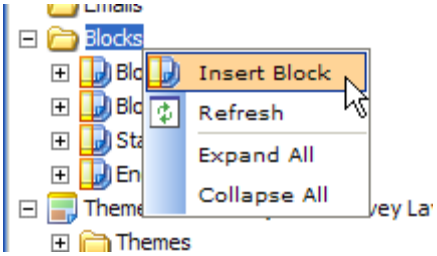


Figure 242 Inserting a new Block into the Blocks folder

2. Add objects (questions, loops etc.) to the Block as required, using the same methods as when adding objects to the questionnaire (go to How to Add New Objects to the Questionnaire Tree on page 147 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.

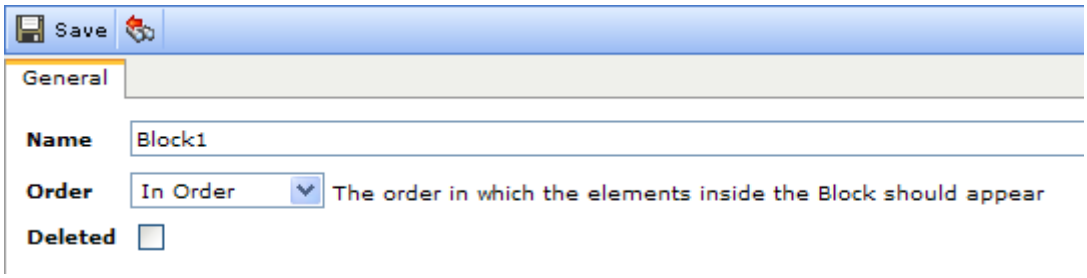


Figure 243 The Block Properties page

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.
- **Deleted** - if the block has been deleted from the tree and you wish to reinstate it, undelete it by un-checking the box (go to Deleting Objects on page 191 for more information).

7.2.10.3. 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 (go to How to Create a Block on page 183 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.

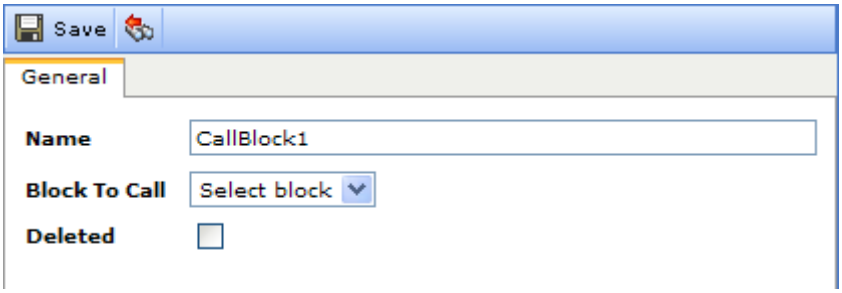


Figure 244 The CallBlock Properties page

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 un-checking the box (go to Deleting Objects on page 191 for more information).

7.2.11. 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 (go to Dynamic Questions on page 283 for more information).

Pages can be used inside Blocks. Pages can also be used in combination with Question masking (go to Confirmit Scripts on page 270 for more information) if there are some questions that are to be displayed only under certain conditions.

To insert a page in your questionnaire:

1. Drag a Page object from the New Objects toolbox and drop it into the questionnaire tree.
2. Insert into the Page folder the questions you want to rotate or to randomize.

   To edit the page item, double-click it or right-click it and choose **Edit** from the menu. The editor page opens.

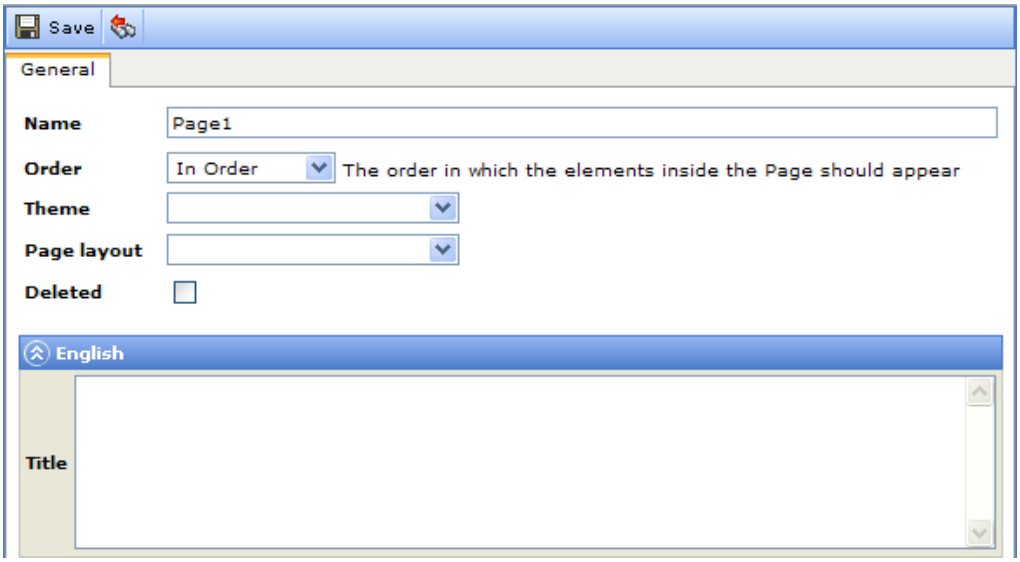


Figure 245 Setting up a Page object

- **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* (go to Editing the Routing on page 190 for more information), you can undelete the object by unchecking this flag.

7.2.12. Email

The email object 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** (go to Sending Email on page 336 for more information).

The Email object will be included in the copy of the project when you duplicate the questionnaire. 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 (go to Translator on page 255 for more information). This means that email texts and setups can be stored and reused in all project languages.

To add a new email object to your questionnaire, either drag the "Email" object from the New Objects toolbox and drop it into the **Emails** folder in the Questionnaire Tree, or right-click on the **Emails** folder and choose **Insert email** from the menu.

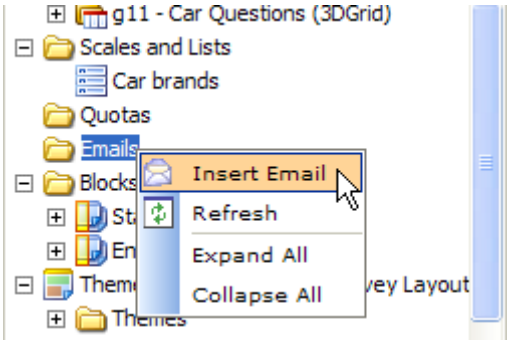


Figure 246 Inserting an Email object

To edit an email object, either double-click on it or right-click on it and choose **Edit** from the menu. The Email Details page opens as shown in the example below.

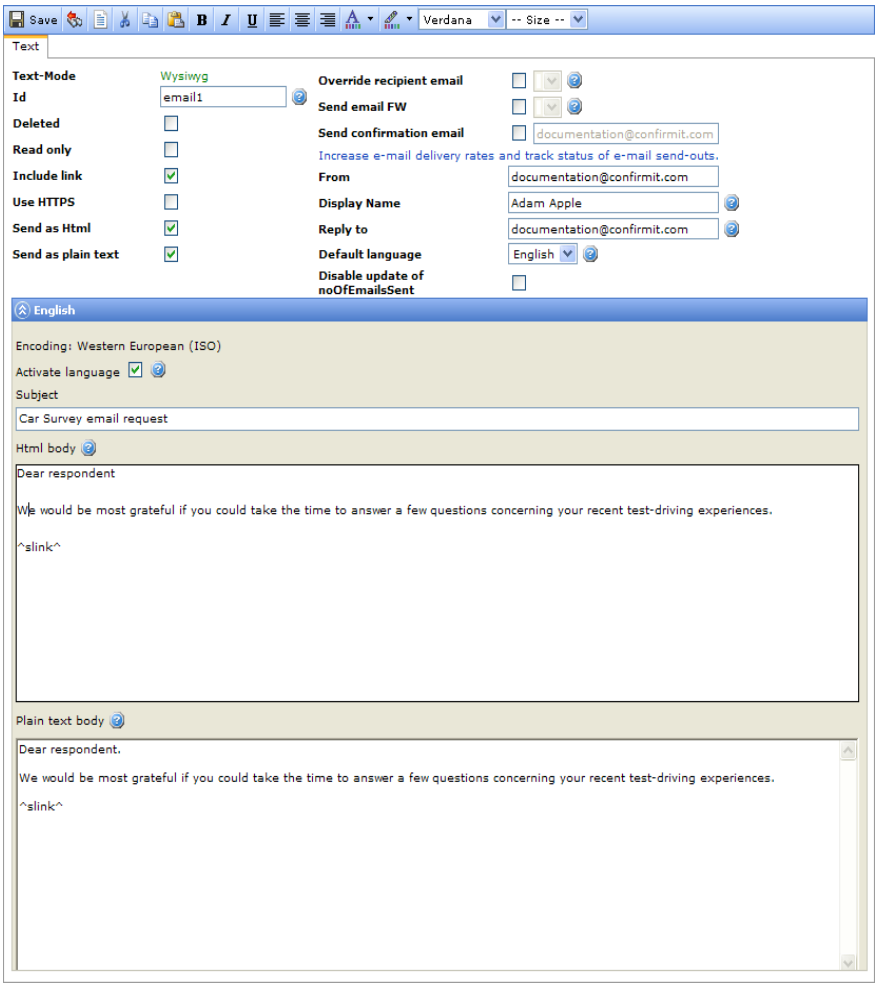


Figure 247 Editing an Email object

The email object has two text fields for each language: one for HTML body and one for Plain text body. When sending emails to respondents, you can choose to send the emails in either or both of those formats in one transmission. 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.

When you are working in Confirmit Professional designer, you can switch between two editing modes when editing email objects: the WYSIWYG mode and the HTMLSource mode. The active mode will be indicated in the Text-Mode field.

When you are using the WYSIWYG editor, you will be able to format the text by using the buttons in the formatting toolbar.

**Note: Press the ENTER key on your keyboard in WYSIWYG mode to add a paragraph break, represented by HTML code <p> in HTML Source mode. Use SHIFT+ENTER to add a single line break, represented by
 in HTML Source mode.**

- **Id** – displays the name/title of the current email object. The default values are “e1”, “e2”, etc. You can edit the Id to a more descriptive title as required.
- **Deleted –** will be chosen if the email object is soft-deleted. If you uncheck the Deleted option, the email object will be undeleted (go to Deleting Objects on page 191 for more information).
- **Read only –** choose this setting if you want the email object to be locked so that no changes can be made to it accidentally, either in questionnaire editing mode or when sending emails 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 llink 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 emails to respondents, you can choose to send the emails 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 –** check to override the respondents’ emails with emails from another column. You must choose the column name from the drop-down. 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.

Note: The noOfEmailsSent column will only show the number of emails sent to the respondents in the ‘email’ column.

- **Send email FW –** select this option and select a column from the drop-down if you want to forward the survey emails 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.

- **Send confirmation email –** check this option if you want to receive confirmation email from the system, stating that the emails have been sent.

The value entered in the **Display Name** 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 (go to Fixed Sender Domain and Email Delivery Report Functionality on page 189 for more information).

Note: “Out of office” emails will be sent to the address in the From field.

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.

In multilingual limited surveys, you can upload the respondent list with a column ‘language’ where each respondent’s language is specified (go to Handling Respondents in Limited Surveys on page 322 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 correct languages to respondents.

Note: This is not an interface for the SendMail script (triggered alerts/emails from surveys). This is only for batch emailing (Respondents > Emailing).

7.2.12.1. Fixed Sender Domain and Email Delivery Report Functionality

From the Confirmit 11 release, all Confirmit On-Demand customers will 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 (go to Email Delivery Report on page 346 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 after the upgrade to Confirmit 11.
On-Premise clients must license Premium Emailing 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.

7.3. Using Survey Layouts

Note that you can create a more customized look and feel for your surveys with Survey Layouts (go to Survey Layouts on page 40 for more information).

7.4. Secondary Project

In Professional 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.

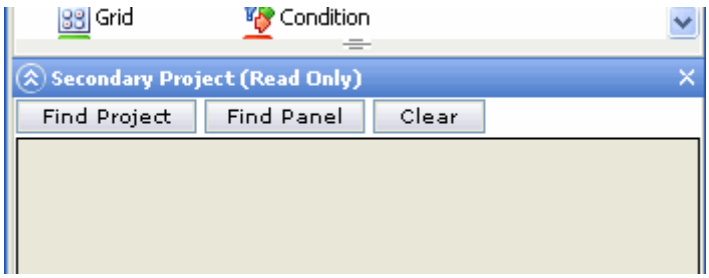


Figure 248 The Secondary Project toolbox

To find the project or panel you wish to add, open in this toolbox and click the **Find Project** or **Find Panel** button as appropriate. To remove a questionnaire tree/project from the toolbox, click the **Clear** button.

When you click either the **Find Project** or **Find Panel** button, a pop-up window displaying all projects or panels will be displayed as shown below.

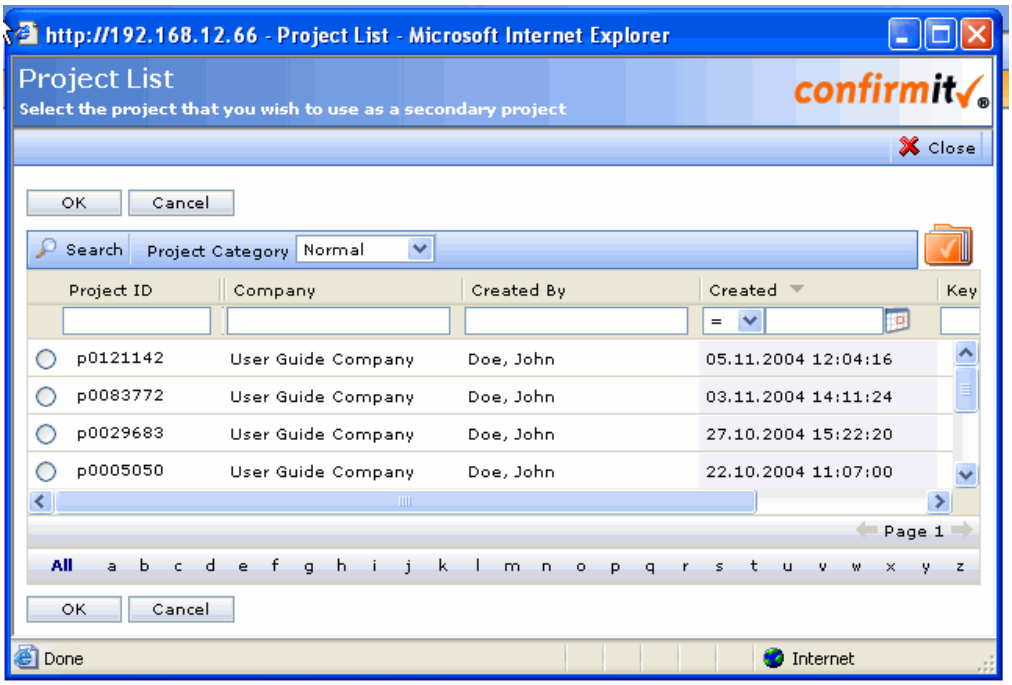


Figure 249 Example of the Project List pop-up

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

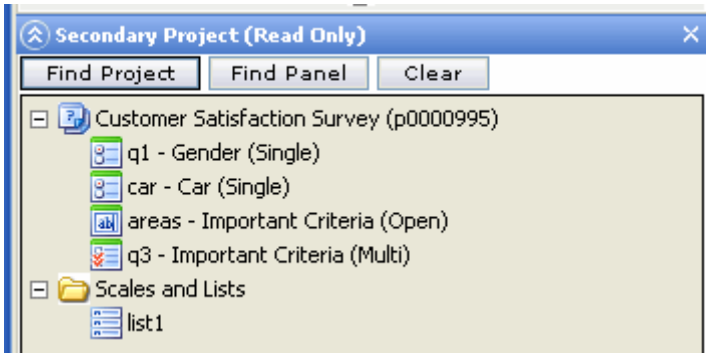


Figure 250 Example of the Secondary Project questionnaire tree

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.

7.5. 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.

7.5.1. 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 (go to Question Properties on page 160 for more information).

7.5.2. 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.

7.5.3. 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 (go to Moving an Object on page 190 for more information). You can also hold the mouse pointer over the folder while moving the objects to drop them into the folder.

7.5.4. 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 (go to Question Properties on page 160 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.

7.5.5. 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 a routing object, not the **icon**. You cannot drag the icon.

7.6. Scratchpad

The scratchpad is a text editor that is available in several screens. If you paste text into the scratchpad, for example from a Word file, you can 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.

7.7. 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.

7.8. Grid View

The Grid View is a page where selected properties of selected questionnaire objects are gathered in one page. 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.

7.8.1. The Grid View Configuration Page

To enter the Grid View configuration page:

1. Highlight two or more objects in the questionnaire or a Scale/List.
2. Right-click and select **Grid View** from the menu.

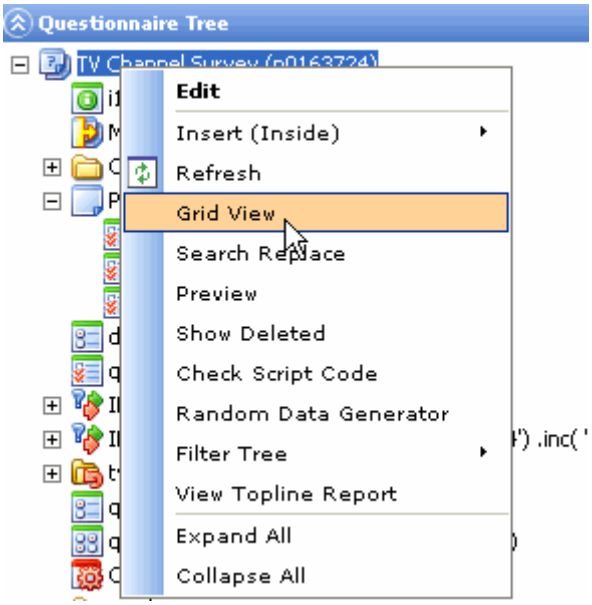


Figure 251 Choosing Grid View from the right-click menu

The Grid View configuration page is displayed.

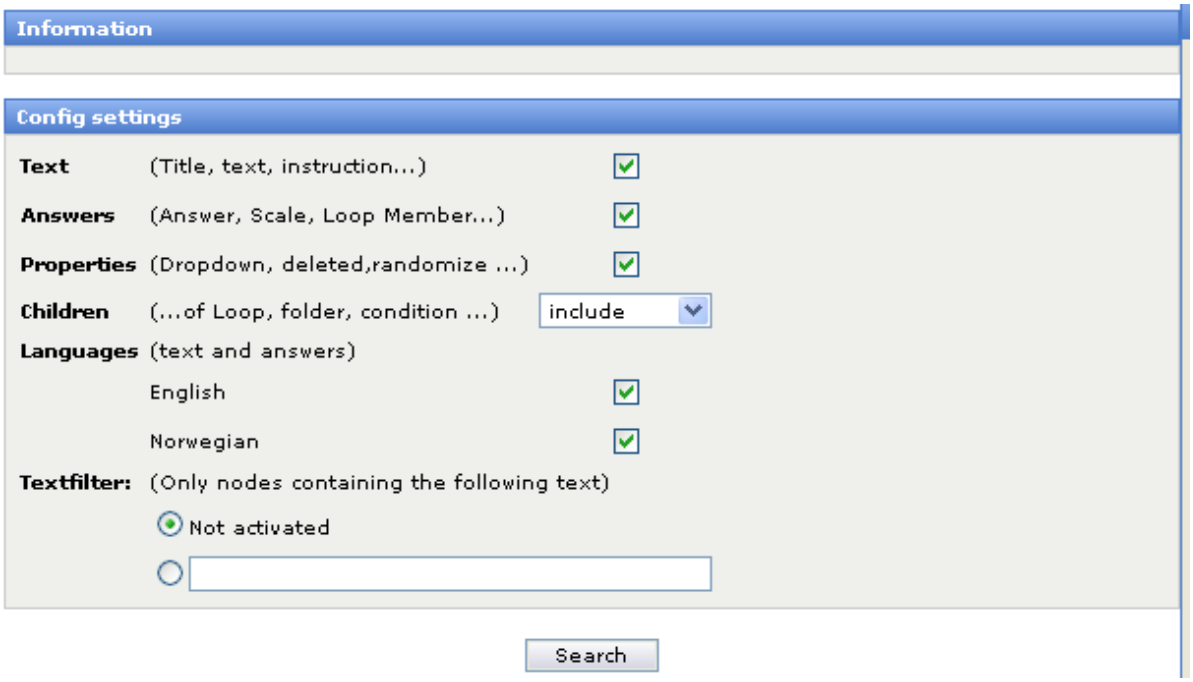


Figure 252 The Grid View Configuration page

The Grid View can be used:

- On the whole project by highlighting the project title folder: you then will be able to edit all the objects in the questionnaire and Scales/Lists
- On the whole Routing folder: you then will be able to edit all the objects in the questionnaire
- On folders: you then will be able to edit all the objects in the folder
- On conditions: you then will be able to edit all the objects subordinate to the conditional expression
- On single nodes in the questionnaire

The configuration properties are as follows:

- **Text** - check this box to enable question text fields (title, text, instruction) in Grid View.
- **Answers** - check this box to enable answers (answers, scales, loop members) in Grid View.
- **Properties** - check this box to enable form properties in Grid View.
- **Children** - choose whether to include or not to include the children of nodes (loop, folder, condition) in Grid View.
- **Languages** - choose in which project languages you want to work in Grid View.
- **Textfilter** - enable nodes containing a specific text string in Grid View.
- **Search** - click this button to activate the Grid View according to your chosen settings.

7.8.2. The Grid View Page

The Grid View Page displays the results of the search. See the following sections for further details.

7.8.2.1. The Grid View of a Single Node

If you choose a Single question, check all the settings and click **Search**, the pane shown below will be displayed.

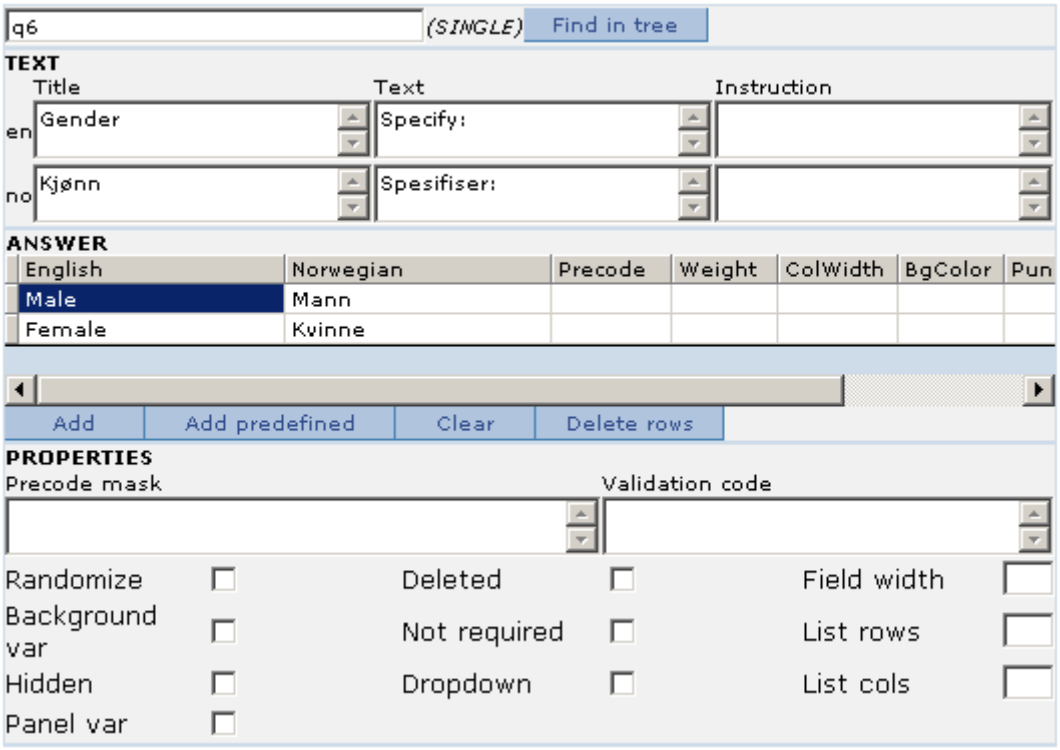


Figure 253 Grid View for a Single Question

As the figure above shows, all fields in the question with the question ID “q6” are editable.

- **Hide tree** - click this button to hide the questionnaire tree. The Grid View will be expanded.
- **Save** - click this button to save the changes made in the Grid View.
- **Find in tree** - click this button to highlight the particular node in the questionnaire tree.
- **Show tree** - the button that appears at the bottom of the Grid View when it has been expanded. Click this button to display the questionnaire tree again.



Figure 254 The Show Tree button

The figures below show how the various nodes in Grid View will be presented.

This shows a Grid View of an Information node with all properties and project languages chosen in the Grid View configuration settings:



Figure 255 Information Node Grid View

This shows a Grid View of an Open Text question with all properties and project languages chosen in the Grid View configuration settings:

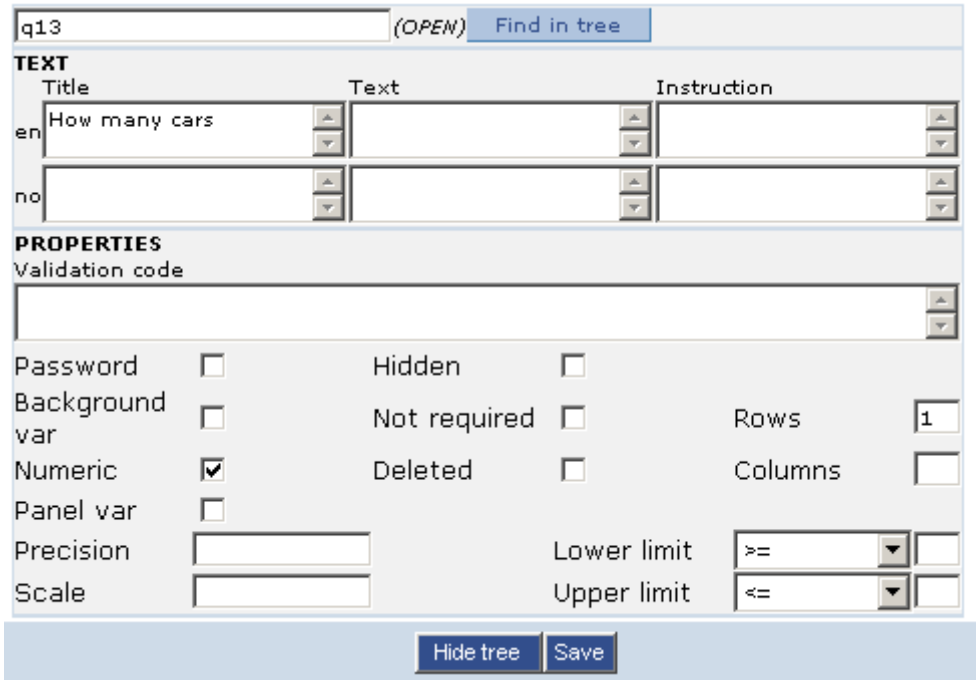


Figure 256 Open Text Grid View

This shows a Grid View of a Grid question with all properties and project languages English and Norwegian chosen in the Grid View configuration settings:

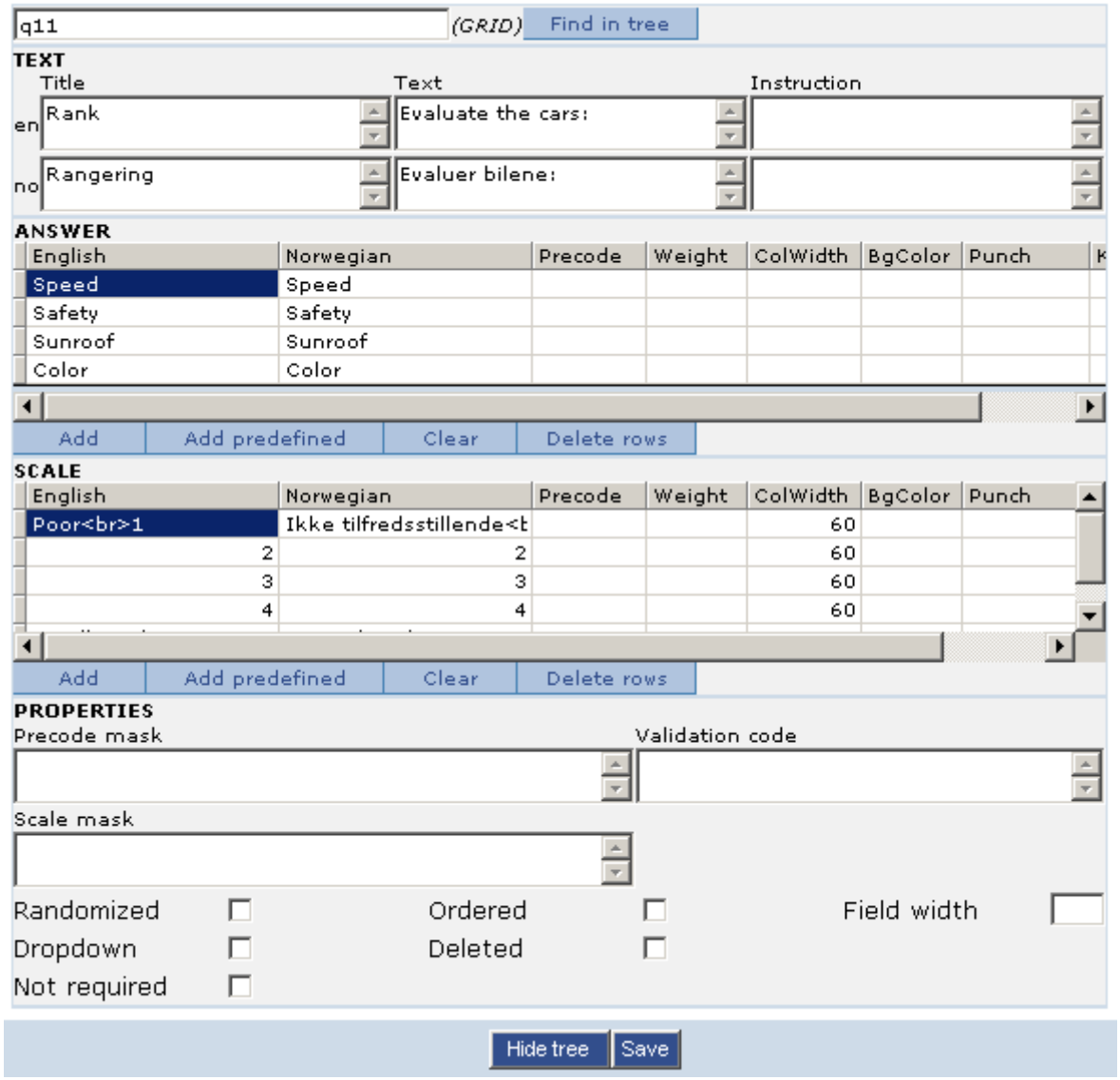


Figure 257 Grid Question Grid View

This shows a Grid View of a Scales/Lists folder with all properties and project languages English and Norwegian chosen in the Grid View configuration settings:

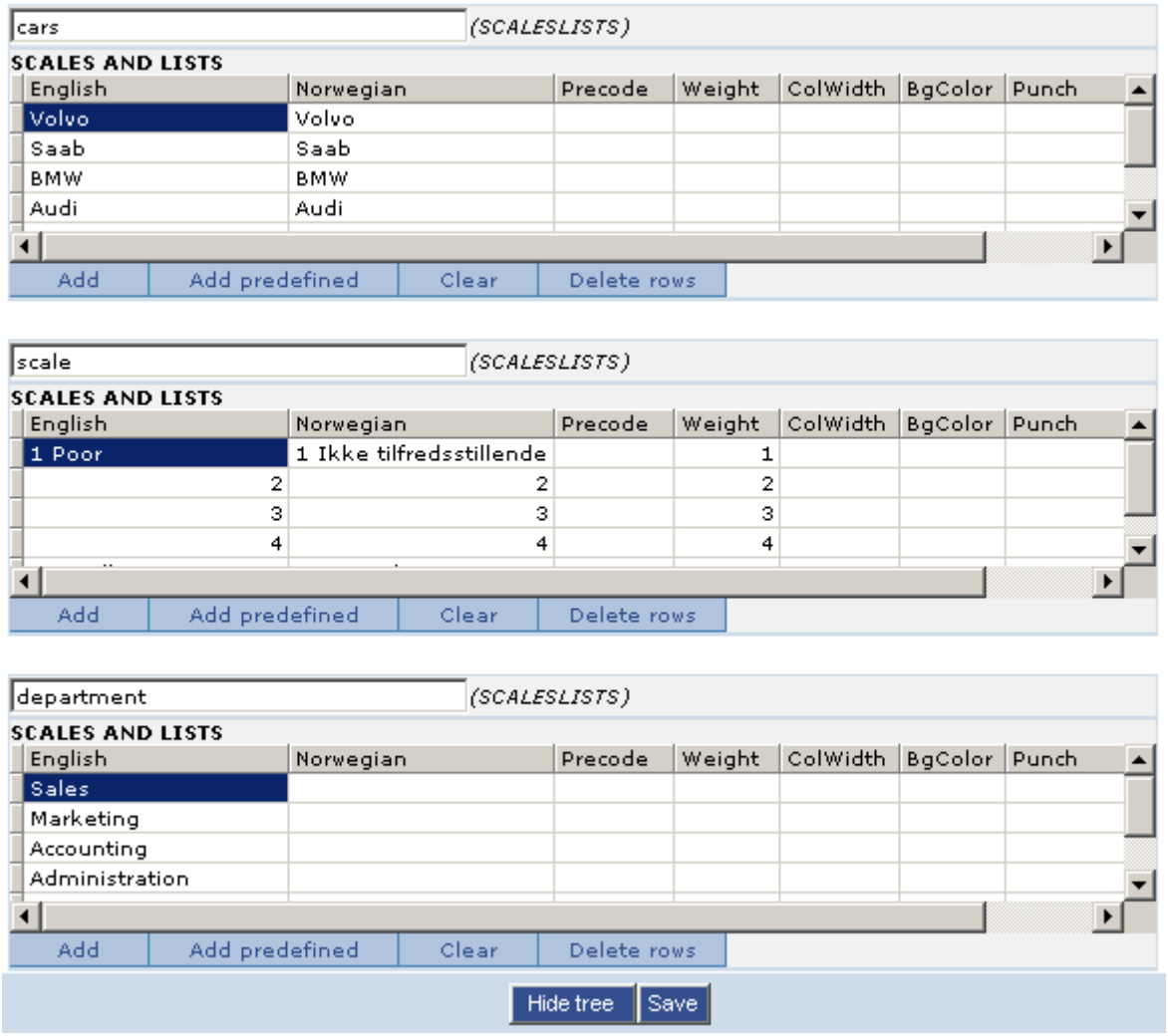


Figure 258 Scales/Lists Grid View

Any changes you make in the Scales and Lists will be saved and applied to all questions where the Scales/Lists are used.

This shows a Grid View of a Condition with all properties and project languages chosen in the Grid View configuration settings:

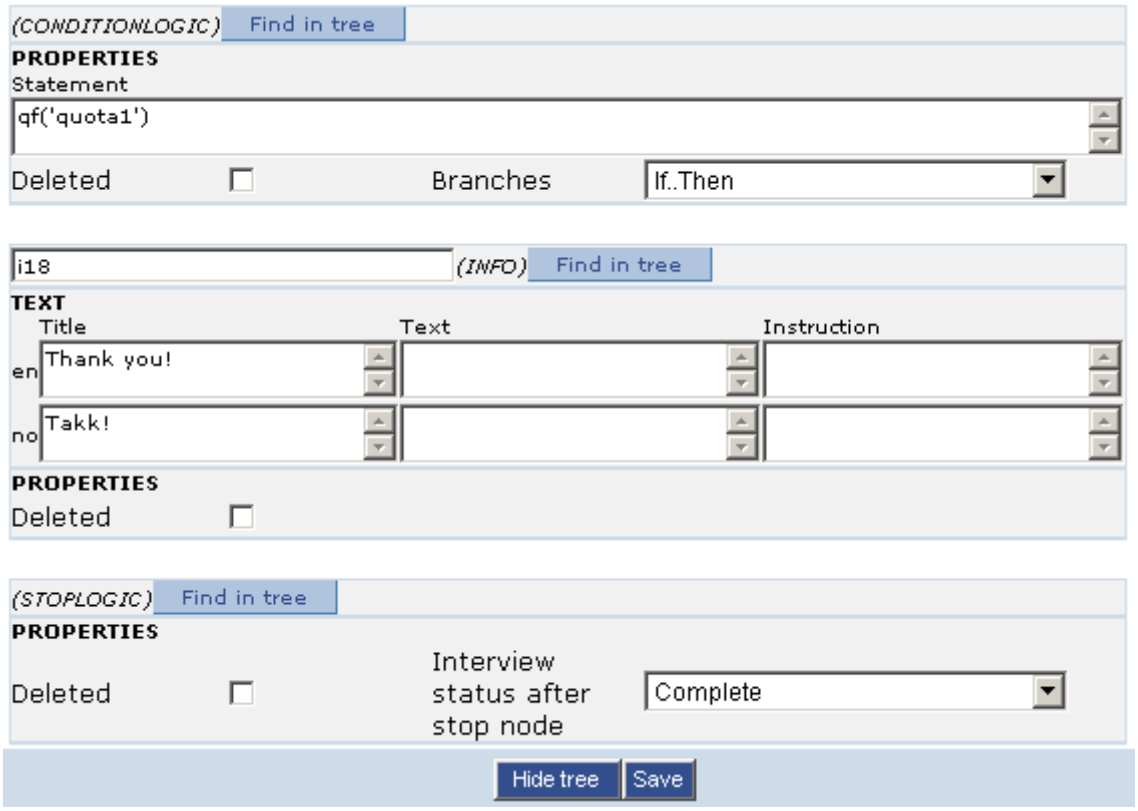


Figure 259 Condition Grid View 1

This shows a Grid View of a Condition with Children set to *not include* in the Grid View configuration settings:



Figure 260 Condition Grid View 2

This shows a Grid View of a Folder with Children set to *not include* in the Grid View configuration settings:



Figure 261 Folder Grid View

7.8.2.2. The Grid View of Project and Routing Folders

If the project is quite long and you highlight the project title folder, choose **All properties** in the Grid View configuration settings and also *include* the children setting, the Grid View will be displayed with a warning message as shown below:

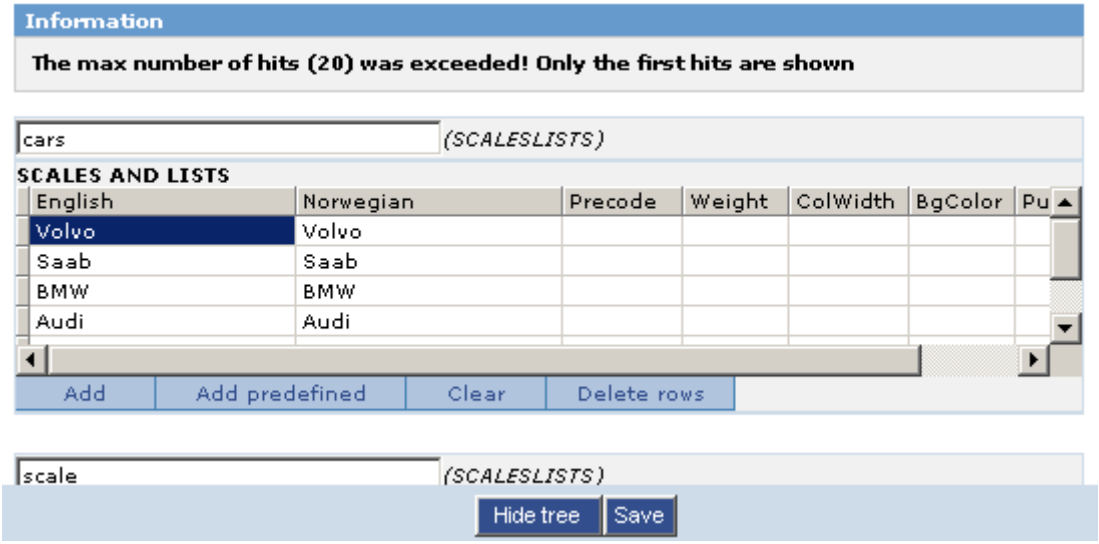


Figure 262 The Max Number of Nodes Exceeded message

The number of nodes shown is specified in the Information field (in this case 20*)*. If the project has reusable Scales/Lists, these will be displayed first. In this case, you would be advise to select fewer objects from the questionnaire.

Note: On-Premise Customers will themselves be able to specify the maximum number of nodes to show in the registry settings!

7.8.2.3. Using the Text Filter Setting

If you want to edit nodes containing specific text, activate the Textfilter setting in Grid View Configuration settings and enter that specific text in the text field.

In the example below, the user has chosen the Routing, and specified in the Textfilter that only nodes containing the word “question” should be shown in the Grid View.

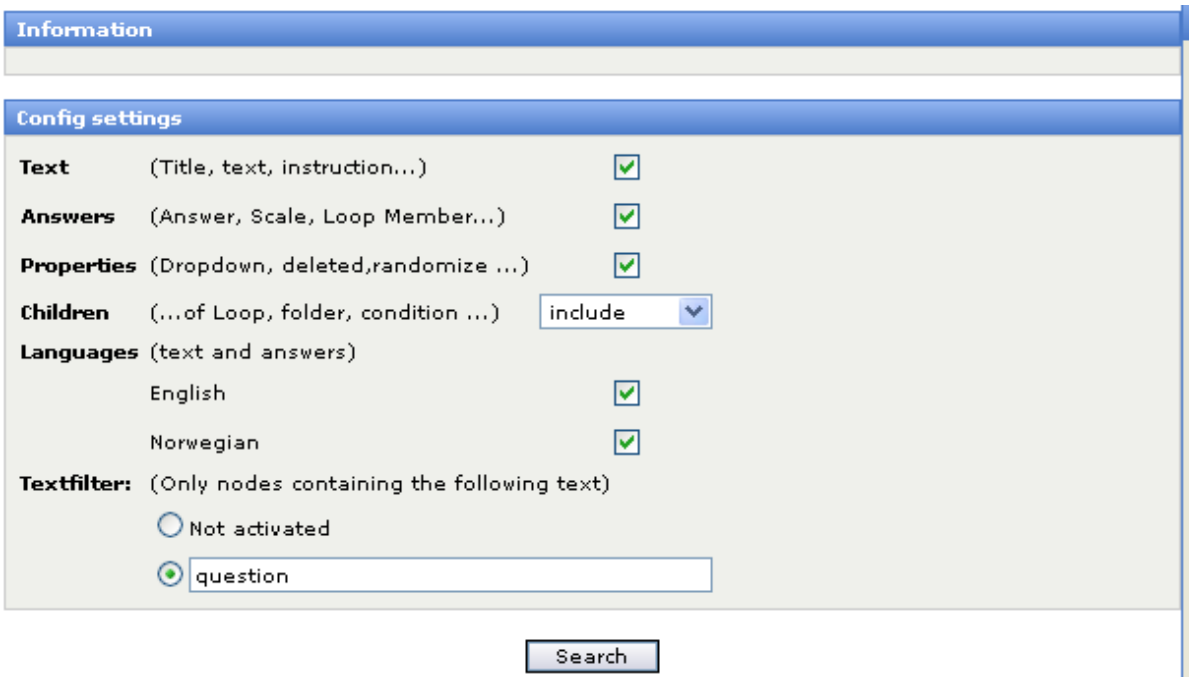


Figure 263 Example with the Textfilter activated

7.9. Search/Replace

Search/Replace functionality is a part of the Grid View functionality. It allows you to edit several questionnaire objects simultaneously in one page in all project languages. It is a page where selected properties of selected questionnaire objects that match the search criteria are gathered in one page. You can edit the properties in the page and save the changes there.

All questionnaire objects, except Quotas, may be edited in Search/Replace Grid View.

7.9.1. The Grid View Configuration Page for Search/Replace

To enter the Grid View configuration page:

1. Select two or more objects in the questionnaire tree or a Scale/List.
2. Right-click on an object and select **Search Replace** from the menu.

   The Grid View configuration page opens with the Search/Replace field.

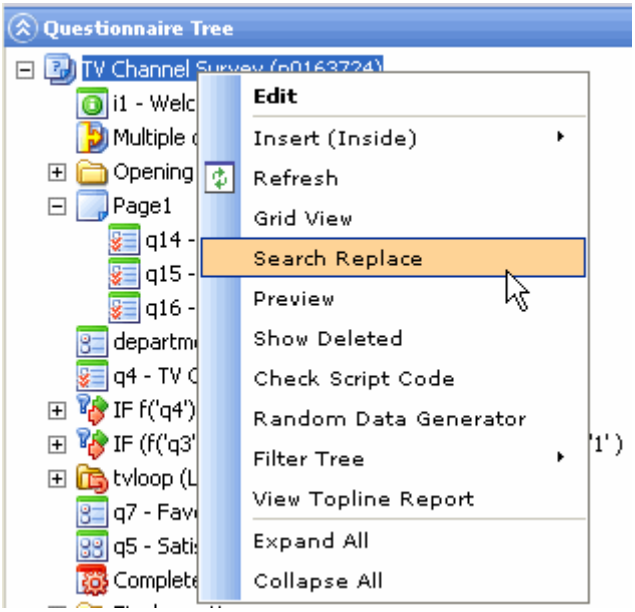


Figure 264 Choosing Search Replace from the right-click menu

The Search/Replace function can be used:

- On the whole project by highlighting the project title folder: you will then will be able to edit all the objects in the questionnaire and Scales/Lists.
- On the whole Routing folder: the user then will be able to edit all the objects in the questionnaire.
- On folders: the user then will be able to edit all the objects in the folder.
- On conditions: the user then will be able to edit all the objects subordinate to the conditional expression.
- On single nodes in the questionnaire.

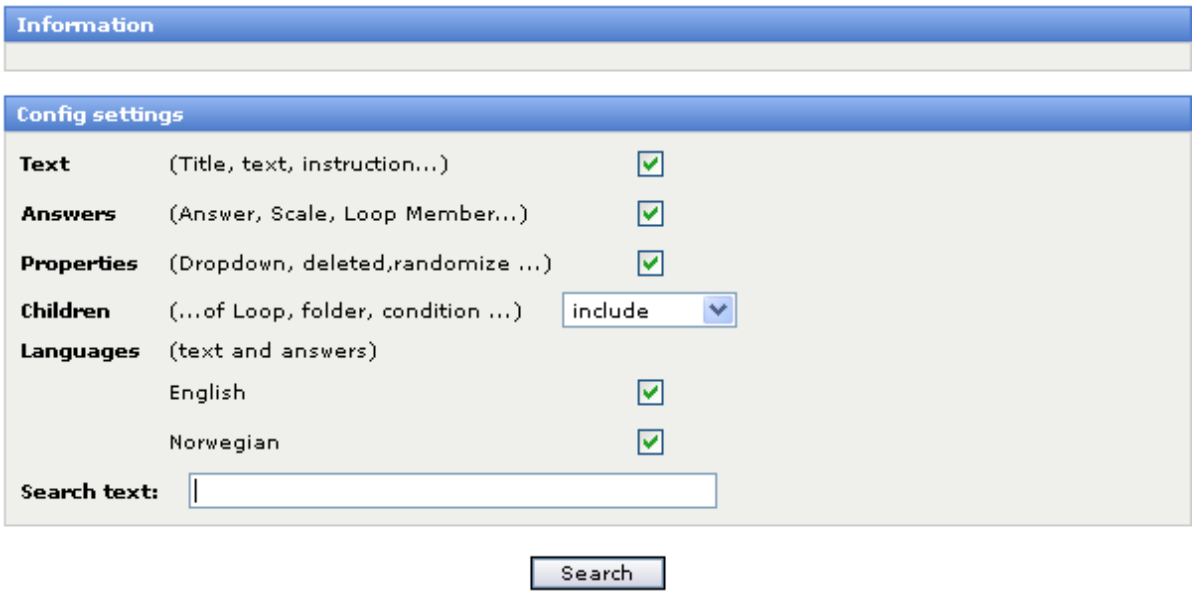


Figure 265 The Search Replace Configuration Settings

The configuration properties are as follows:

- **Text** - check this box to enable question text fields (title, text, instruction) in the Search/Replace Grid View.

- **Answers** - check this box to enable answers (answers, scales, loop members) in the Search/Replace Grid View.
- **Properties** - check this box to enable form properties in the Search/Replace Grid View.
- **Children** - choose whether to include or not to include the children of nodes (loop, folder, condition) in the Search/Replace Grid View.
- **Languages** - choose in which project languages you want to work in the Search/Replace Grid View.
- **Search text** - enable nodes containing a specific text string in the Search/Replace Grid View.
- **Search** - click this button to activate the Grid View according to your chosen settings.

7.9.2. Search/Replace Grid View Page

If you wish to search for a specific text throughout the entire project:

1. In the Questionnaire Tree, right-click on the project folder and choose **Search/Replace** from the menu.
2. Choose the settings and languages in which you wish to make changes.
3. Enter the text that you wish to search for into the Search text field.
4. Click **Search**.

If the project is not very long, all the fields containing the Search text will be displayed in the Grid View. In the picture below, we are searching for all nodes containing the word “car”.



Figure 266 Defining the search in the Configuration Settings dialog

In the picture below, you can see that only the fields containing the word “car” are displayed and editable.

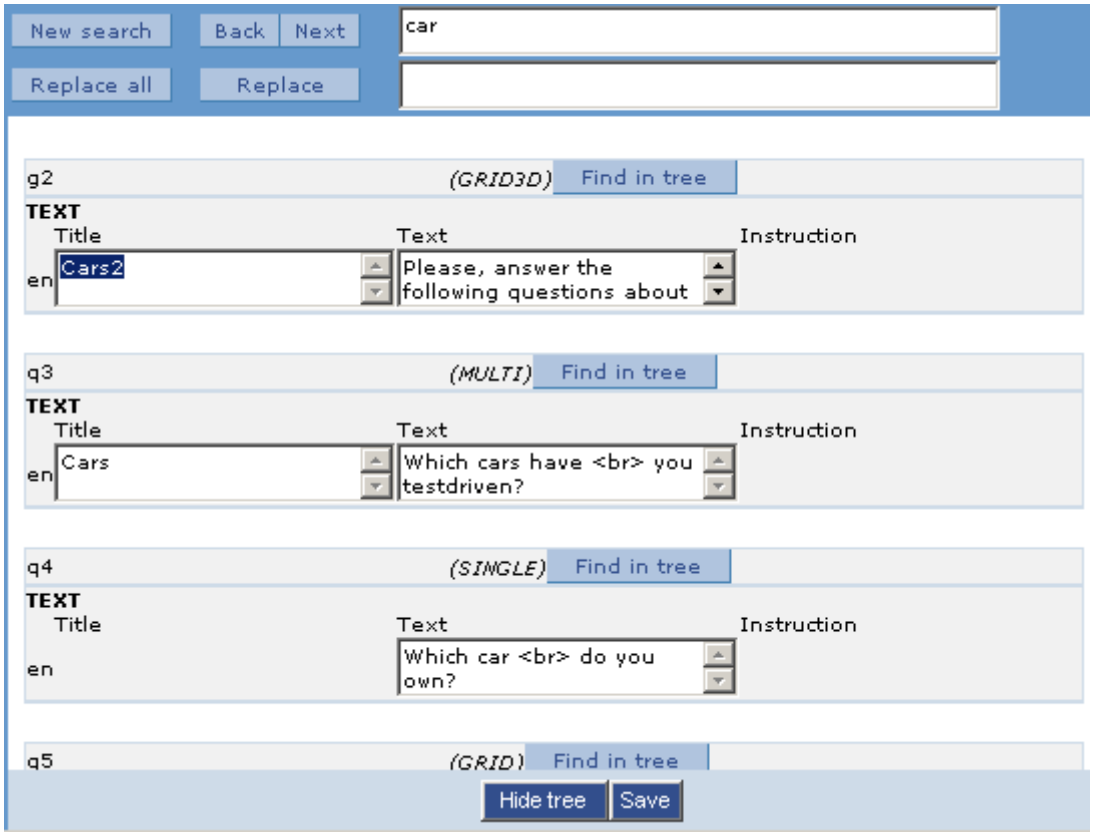


Figure 267 Search/Replace Grid View

The search for “car” returned 3 nodes with the fields where the search word was found: a Grid question, a Multi question, and a Single question. The first occurrence of the search word is highlighted.

Note that while all settings and all project languages were chosen in Grid View configuration settings, the Search/Replace function returns only the fields containing the search word. The buttons are as follows:

- **New Search** - returns to the configuration settings page. You can then perform a new search on the same node.
- **Next** - the next occurrence of the search text is highlighted.
- **Back** - the highlight is moved back to the previous occurrence of the search text.
- **Replace** - replaces the current occurrence of the search text with the text specified in the Replace text field.
- **Replace All** - replaces all occurrences of the search text with the text specified in the Replace text field.
- **Search text field** - the search text you specified in the configuration settings will be displayed here.
- **Replace text field** - specify the text with which you want to replace the search text.
- **Find in tree** - highlights the particular node in the questionnaire tree.
- **Hide tree** - hides the questionnaire tree, and the Search/Replace Grid View will be expanded.
- **Save** - saves the changes made in the Search/Replace Grid View.

7.10. Spell Checker

Note: Spell Checker is based upon 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: Info, Single, Multi, Grid, and Open.

7.10.1. Supported Languages

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

- Brazilian Portuguese
- Danish
- Dutch
- English (UK)
- English (US)
- Finnish
- French (contains both European and Canadian spelling)
- German (includes spelling reform, Die Neue Rechtschreibung)
- Italian
- Norwegian (Bokmål)
- Portuguese (Iberian)
- Spanish (contains European, Mexican, and South American words)
- Swedish

The Wintertree Spelling Server component is installed on the server and all its methods must be run on the server. To allow the spell-check functionality to run faster, all spell checking of a set of fields is carried out on the server, and everything is then returned to the client side. The functionality for change, ignore, etc. are therefore utilized as client side scripts.

7.10.2. Using Spell Checker

To check a question for spelling errors, right-click on the question in the questionnaire tree and choose **Spell Check** from the menu. The following screen is displayed:



Figure 268 The administration window for the Spell Check functionality

All text fields of the question are displayed. The figure above shows a Multi question. Note that by default the first project language is displayed in the Spell check administration window. If you want to check spelling for all project languages (go to Supported Languages on page 204 for more information), click the radio button for the next language to display the text for that language in the Administration window.

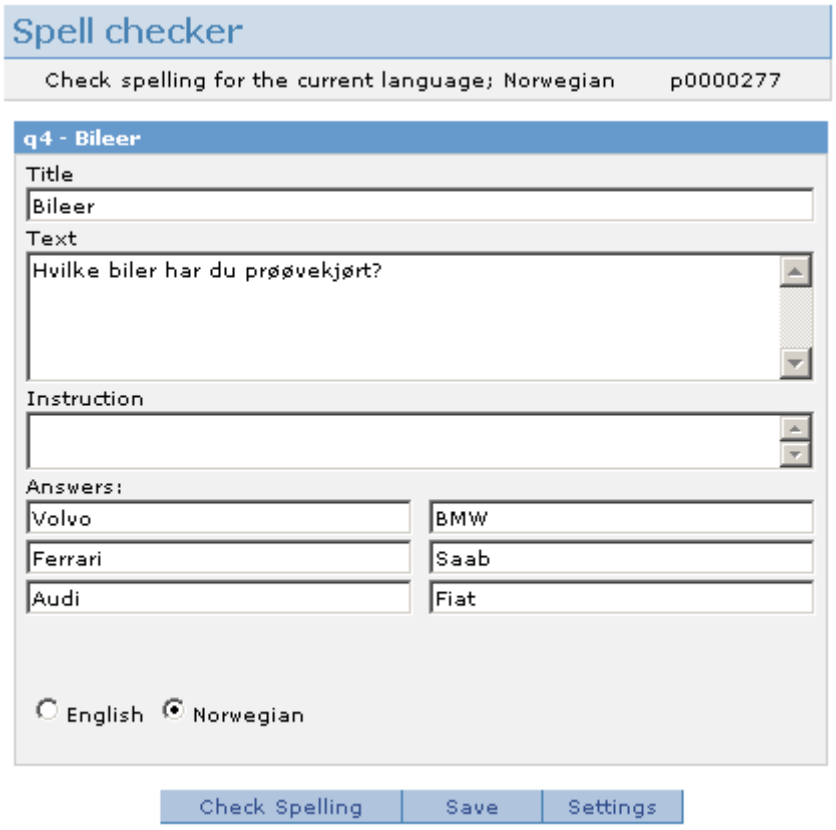


Figure 269 The administration window for Spell Check – Norwegian

Click the **Settings** button to display the Settings window with the default settings chosen:

- Ignore all-caps words
- Ignore HTML markups
- Case sensitive
- Suggest split words
- Typographical suggestions

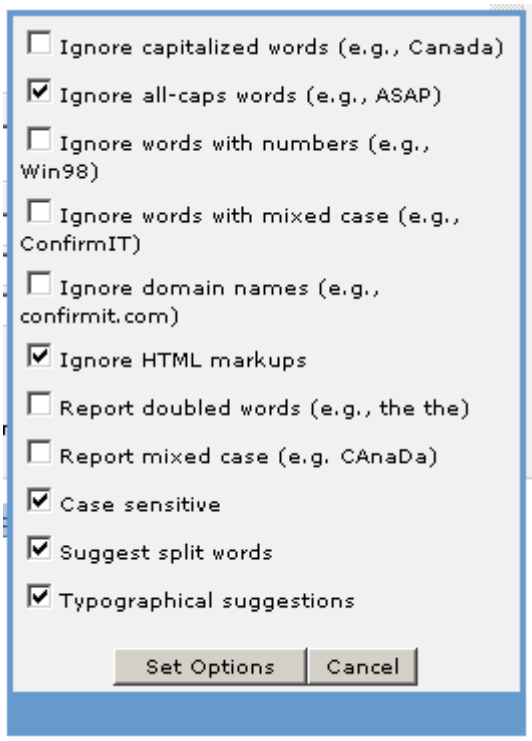


Figure 270 The Settings window

In the Settings window, choose the criteria you want the Spell Checker to use when searching for spelling errors. To save the selected settings, click the **Set Options** button. The settings will be saved and the Settings window will close.

Click the **Check Spelling** button to display the Spell Checker window. To relocate this window, click in the window header and drag it to the desired location.

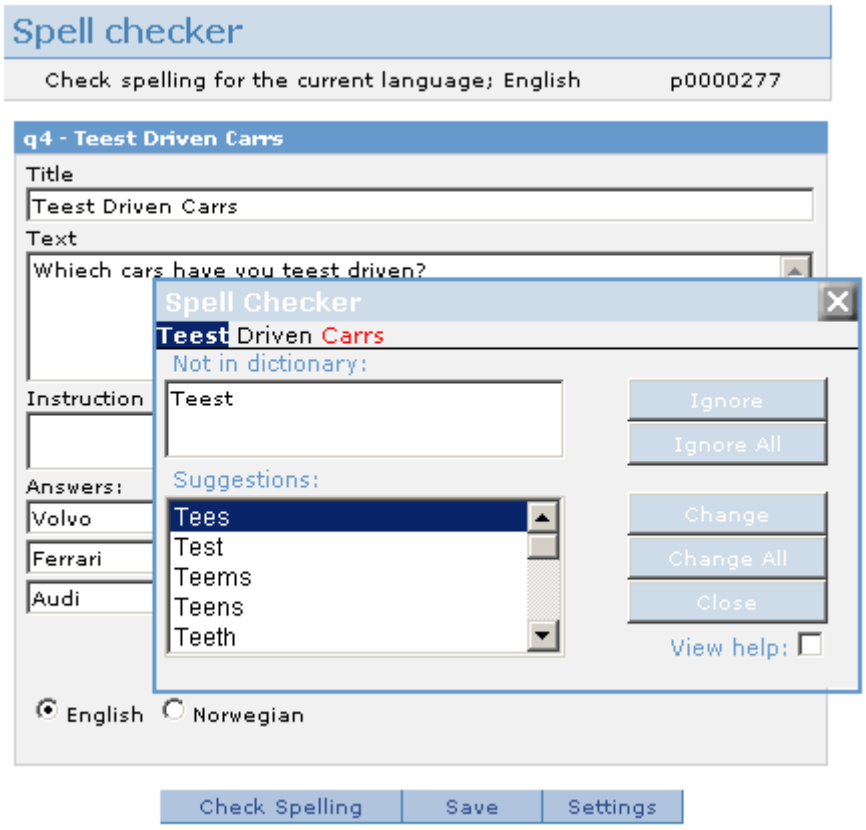


Figure 271 Using the spell checker

The first spelling error the Spell Checker finds will be highlighted. It will be displayed in the *Not in dictionary* field, and all suggestions will be listed in the *Suggestions* field.

- **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.
- **Close** - the Spell Checker window is closed.

If there are several spelling errors in a text field, the first will be highlighted and the remainder will be marked with red font as shown below.

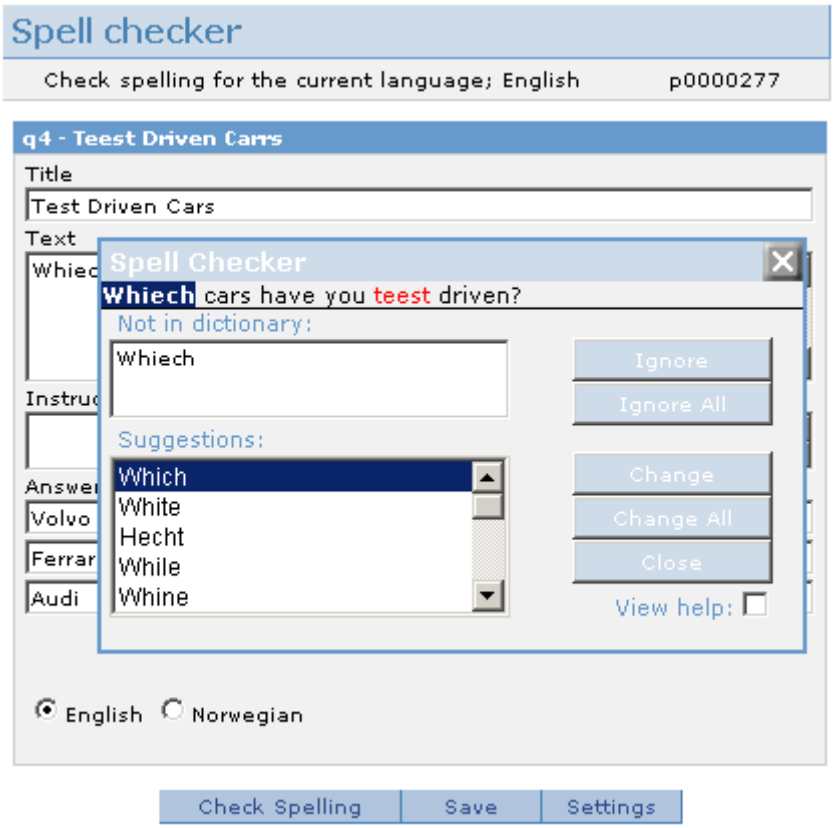


Figure 272 Several spelling errors in a text field

Choose the correct spelling from the list suggested by the Spell Checker, then click the **Change** button to move to the next error.

When all the errors in a question have been corrected, the Spell Checker will inform you that there are no more errors.

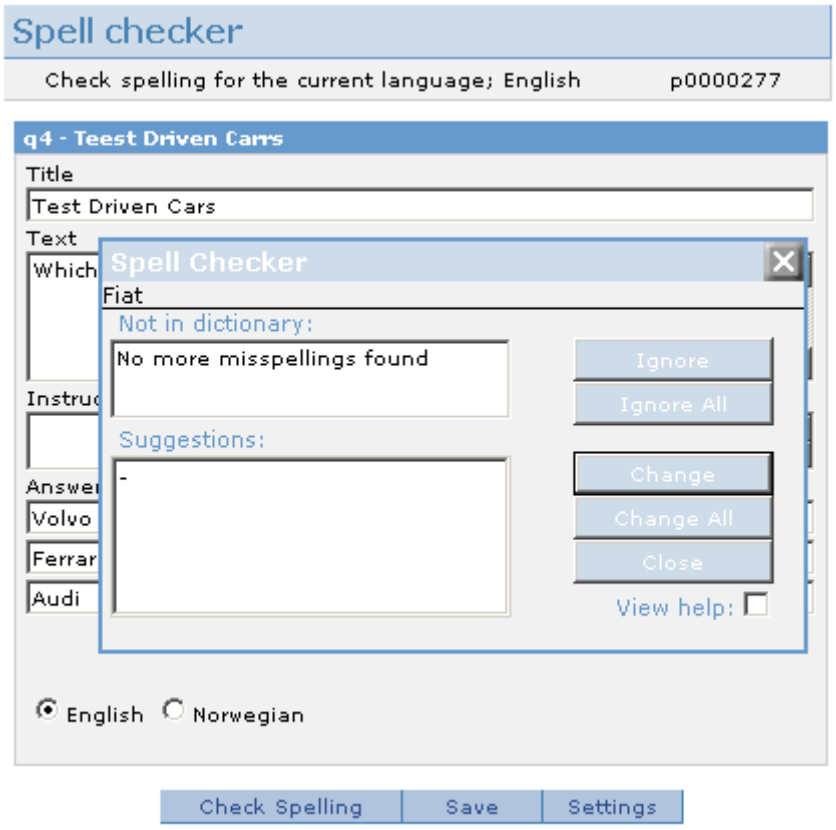


Figure 273 The No More Misspellings message

You can now close the Spell Checker either by clicking Close button or the X-button in the upper right corner of the Spell Checker box. In the Administration window, you must 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.

Check the **View help** check box to display the Spell check help.

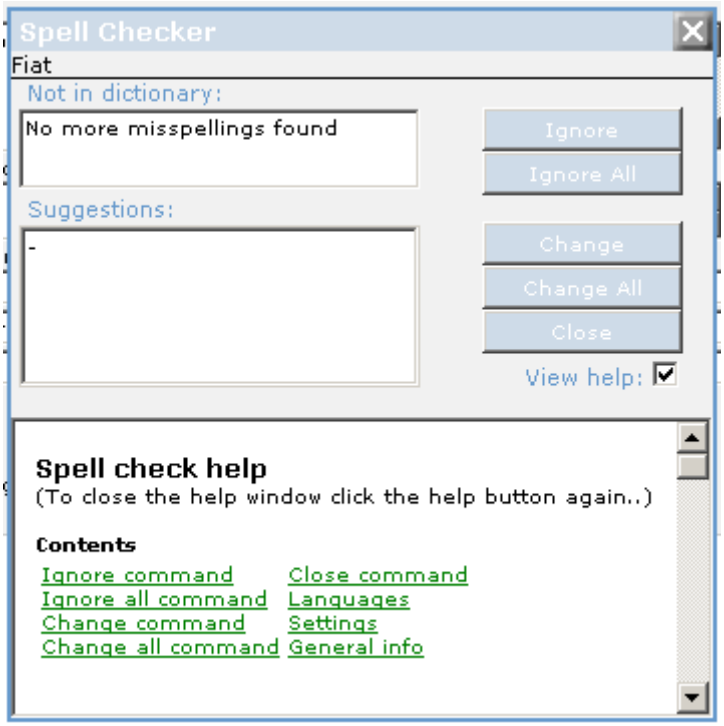


Figure 274 Spell Check Help

7.11. 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.

7.11.1. 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 Set Questionnaire Reviewer Settings dialog opens.

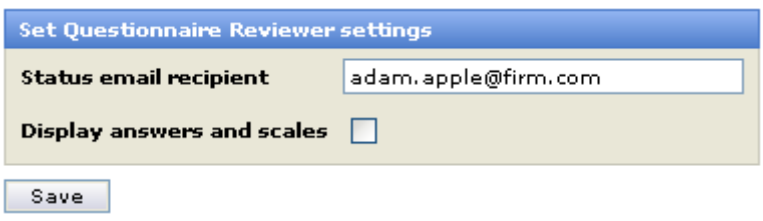


Figure 275 The Set Questionnaire Reviewer Settings dialog

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. 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** to save the changes.

7.11.2. 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 Send email with link… dialog opens. Use this dialog to set up the email that is to be sent to the reviewer(s).



Figure 276 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.

Type in the text and make the settings as appropriate, then click **OK** to send the email.

A notification message is displayed in the bottom of the dialog to inform you that the email is sent.

7.11.3. The Questionnaire Reviewer Window

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

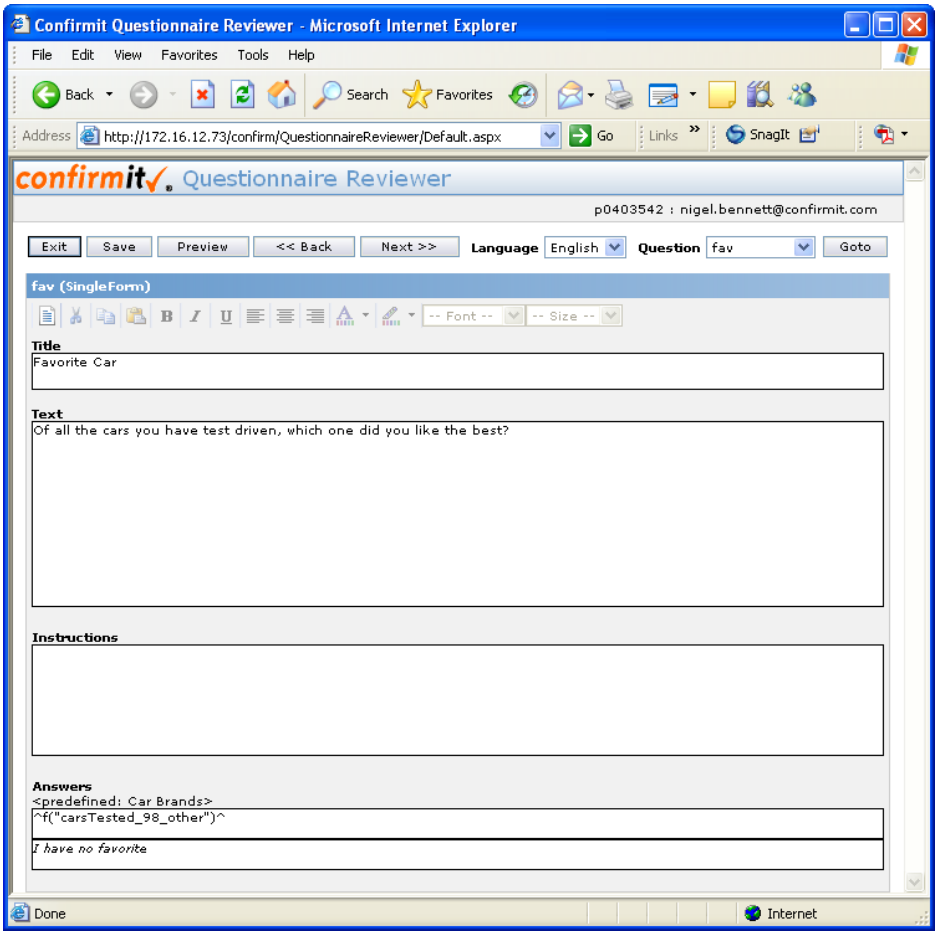


Figure 277 Example of the Confirmit Questionnaire Reviewer window

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 (go to How to Set up the Questionnaire Reviewer on page 211 for more information).

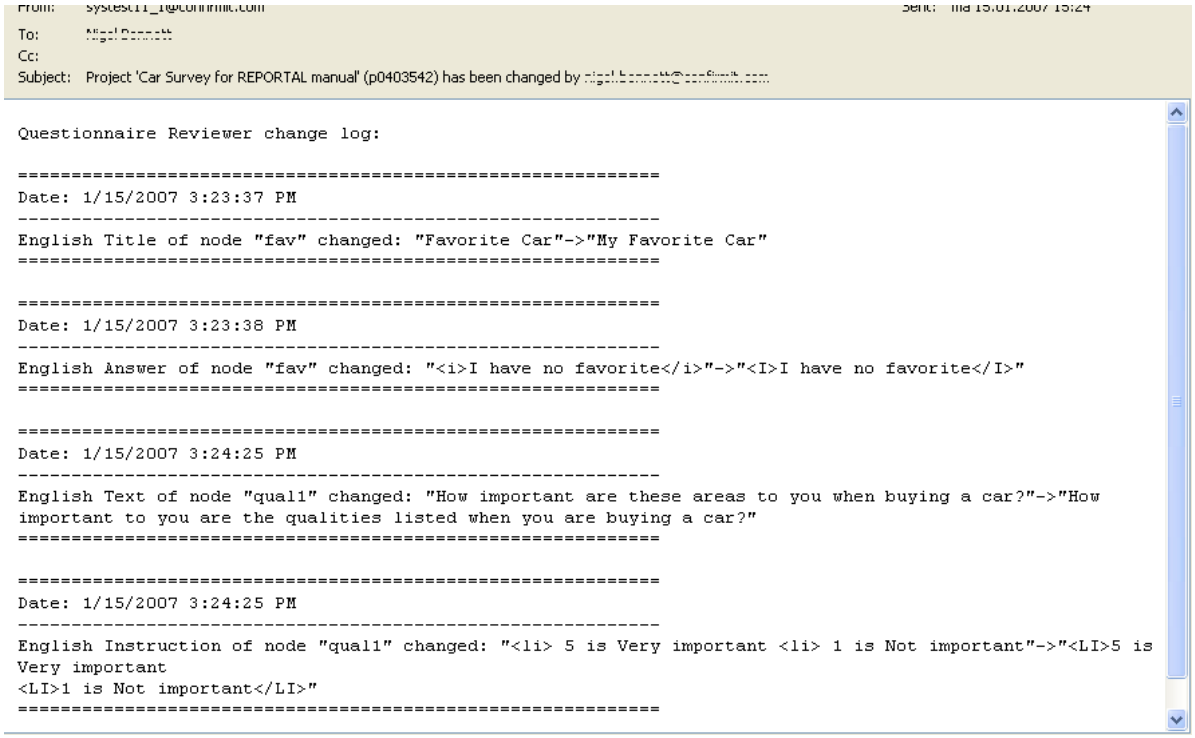


Figure 278 Example of a status email returned from a reviewer

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

8. 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 however will obviously 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 (go to Terminating the Interview for Respondents when Quota is Full on page 232 for more information).

Note: Quotas can be exceeded. 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.

8.1. Two Alternative Views

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

8.1.1. 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 in the previous section) then the menu item will not be available.

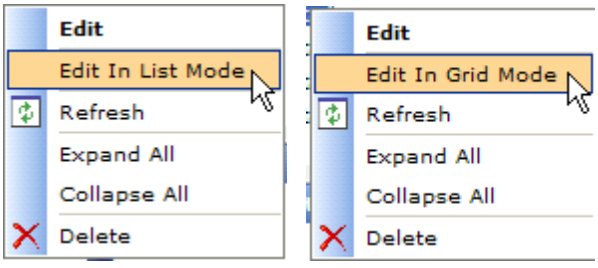


Figure 279 Changing to Grid View when in List View and vice versa

8.1.2. 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 (go to The Grid View Settings Tab on page 218 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.

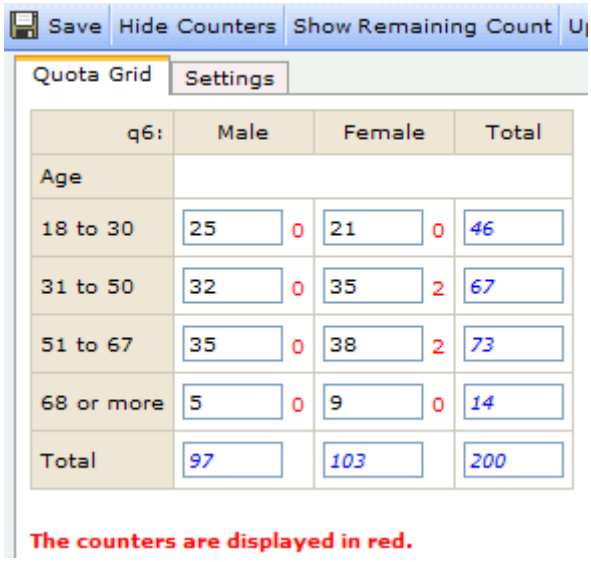


Figure 280 Example of a Grid View table

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 (go to Hiding Unwanted Answer Alternatives on page 226 for more information). If this method will not reduce the number of cells below the limit, consider using List View instead (go to List View for more information).

8.1.2.1. 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 shownbelow illustrate the quota grid for a quota based on one single question, a quota based on two single questions, and a quota based on three single questions.

The targets (black text on white background) are in editable cells. These are the values you type in to define the quota limits. The cells are not "required", so you do not have to input values in all the cells. You can define quotas for only some of the answers (or some combinations of answers in multidimensional quotas) if desired. If a cell is left blank, there will be no quota for that cell.

The 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:

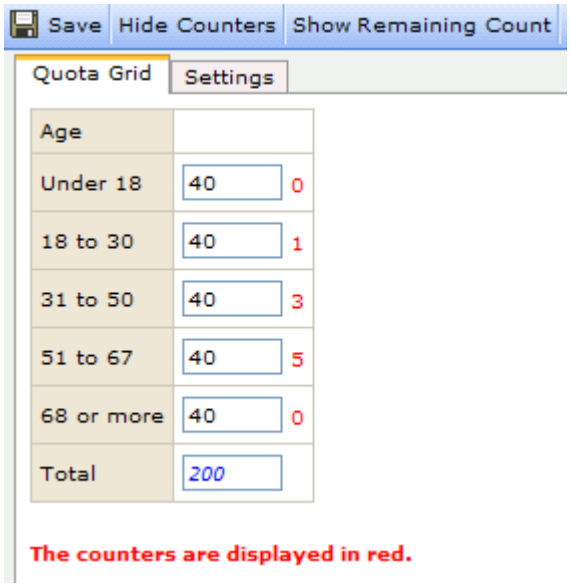


Figure 281 Quota based on one question

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 three replies in the 31 to 50 age group.

This figure shows an example with two questions in the quota:

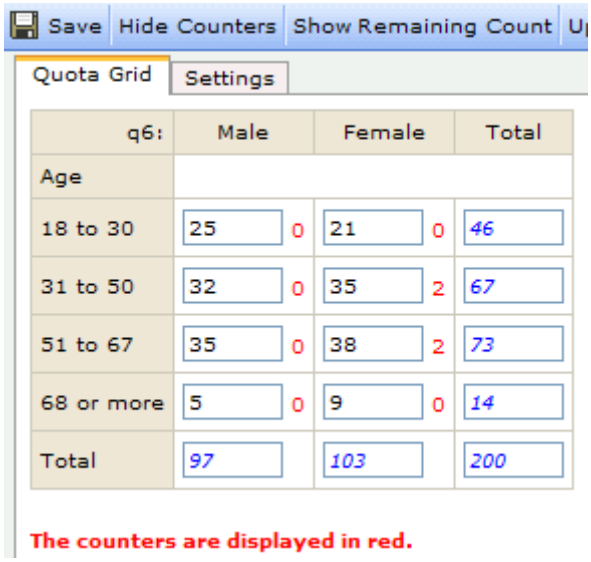
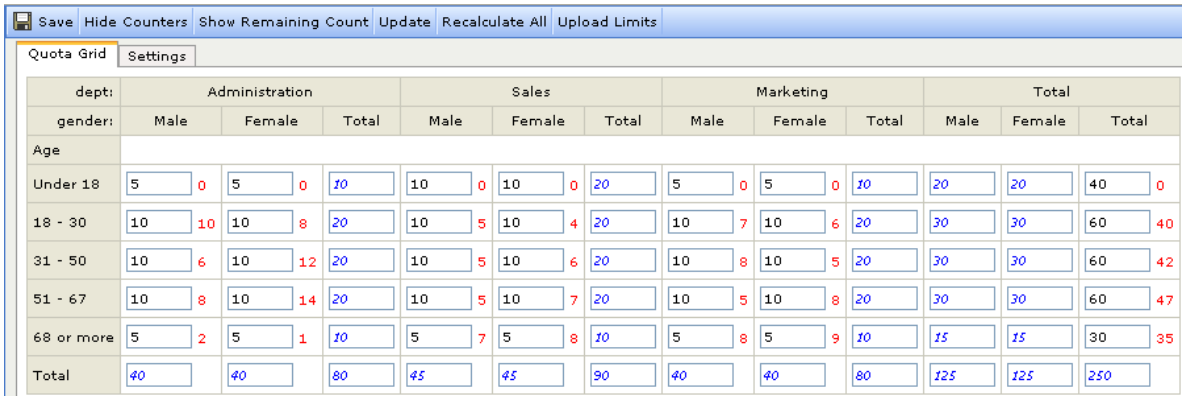


Figure 282 Quota with two questions

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 35 male and 38 female respondents. In this case, so far two female respondents have replied.

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



dept:	Administration			Sales			Marketing			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	20	20	40 0
18 - 30	10 10	10 8	20	10 5	10 4	20	10 7	10 6	20	30	30	60 40
31 - 50	10 6	10 12	20	10 5	10 6	20	10 8	10 5	20	30	30	60 42
51 - 67	10 8	10 14	20	10 5	10 7	20	10 5	10 8	20	30	30	60 47
68 or more	5 2	5 1	10	5 7	5 8	10	5 8	5 9	10	15	15	30 35
Total	40	40	80	45	45	90	40	40	80	125	125	250

Figure 283 Example of a quota with three questions

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

8.1.2.2. 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.

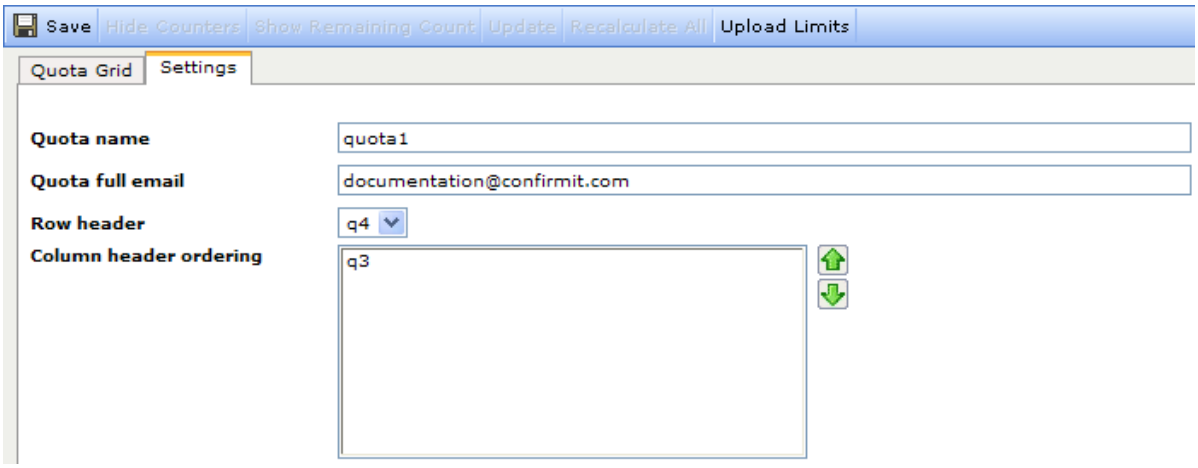


Figure 284 Row selection and column header ordering

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 (go to Email Alert on Full Quota on page 232 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.

Note: Changes to quota attributes, such as the quota name, row header, column order 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.

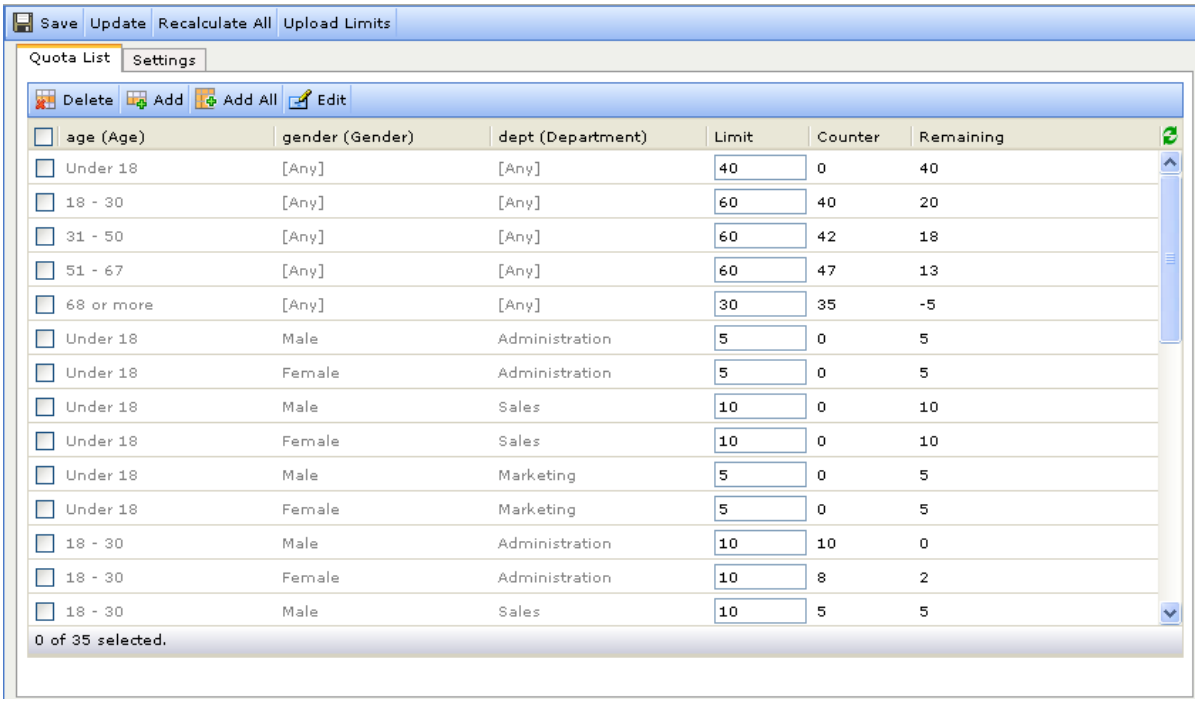
8.1.3. The List View

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 (go to Defining the Quota Values in List View on page 227 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.



age (Age)	gender (Gender)	dept (Department)	Limit	Counter	Remaining
Under 18	[Any]	[Any]	40	0	40
18 - 30	[Any]	[Any]	60	40	20
31 - 50	[Any]	[Any]	60	42	18
51 - 67	[Any]	[Any]	60	47	13
68 or more	[Any]	[Any]	30	35	-5
Under 18	Male	Administration	5	0	5
Under 18	Female	Administration	5	0	5
Under 18	Male	Sales	10	0	10
Under 18	Female	Sales	10	0	10
Under 18	Male	Marketing	5	0	5
Under 18	Female	Marketing	5	0	5
18 - 30	Male	Administration	10	10	0
18 - 30	Female	Administration	10	8	2
18 - 30	Male	Sales	10	5	5

0 of 35 selected.

Figure 285 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.

8.1.3.1. 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.

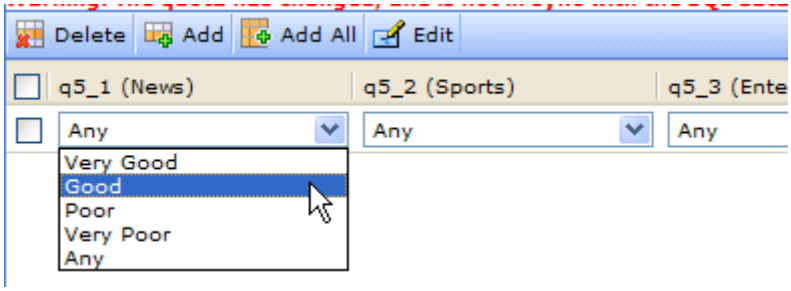


Figure 286 Quota details for a grid question

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 (go to The List View Settings Tab on page 221 for more information). Note that the hidden fields will still be part of the quota definition.

8.1.3.2. 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.

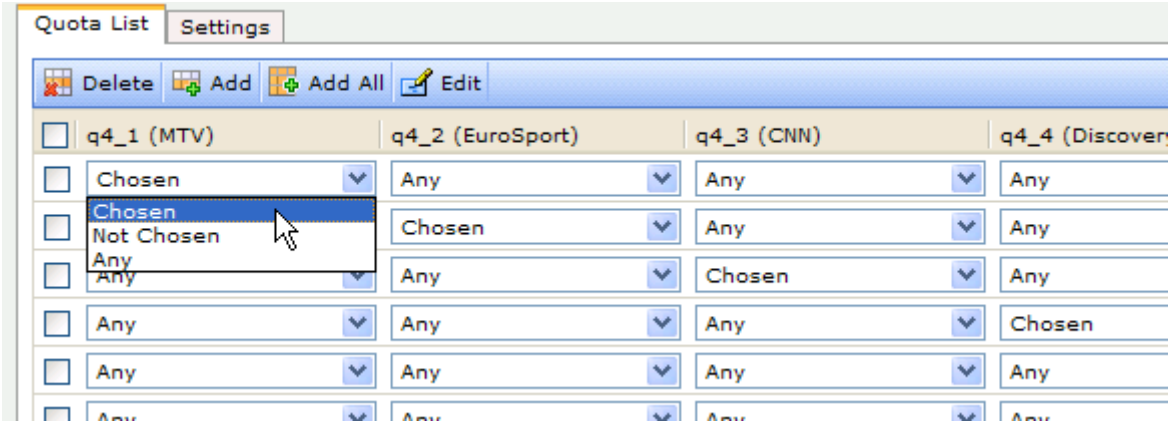


Figure 287 The Quota details for a multi question

Note that if a respondent in the quota in the figure above has selected for example MTV in combination with CNN, and the MTV quota is full, the "quota full" function (qf) will return TRUE for that respondent, even if the CNN quota is not full. Often in such circumstances you might want to let the respondent continue for CNN, which 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 set 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 (go to The List View Settings Tab on page 221 for more information). Note that the hidden fields will still be part of the quota definition.

8.1.3.3. 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.

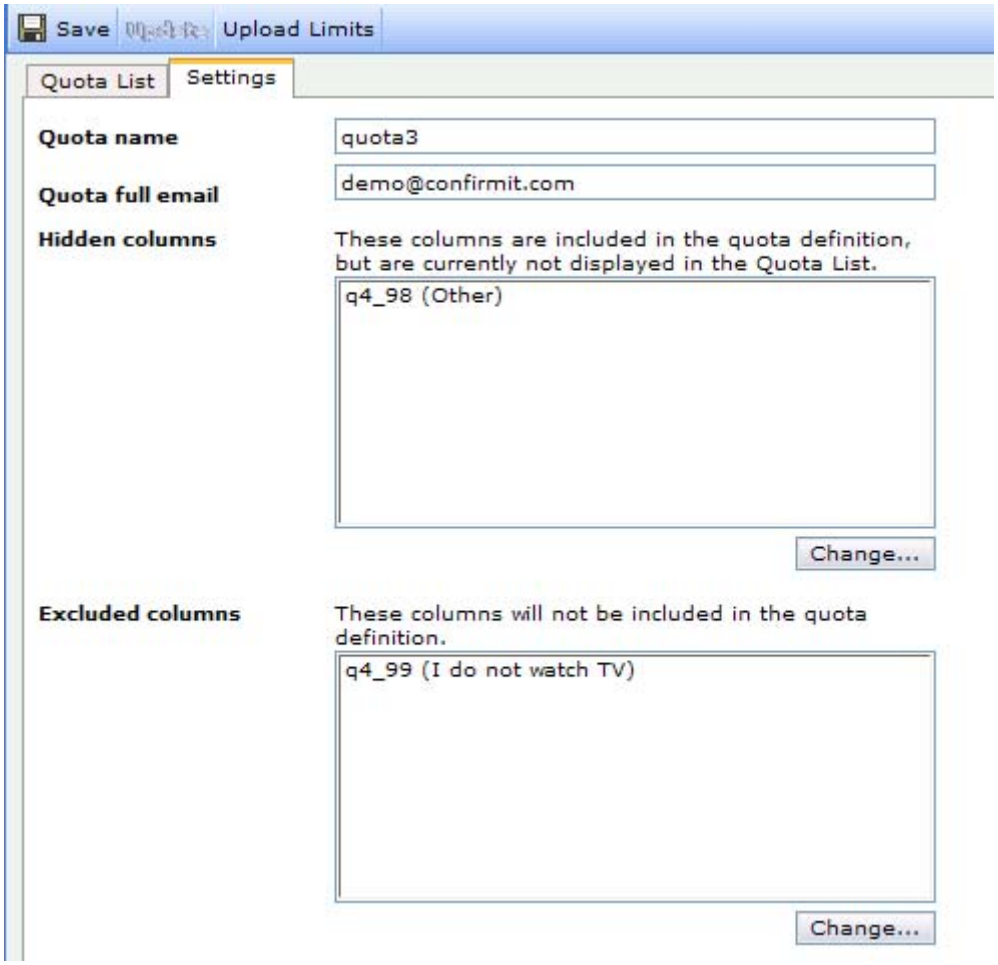


Figure 288 Hiding and excluding columns in list view

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.

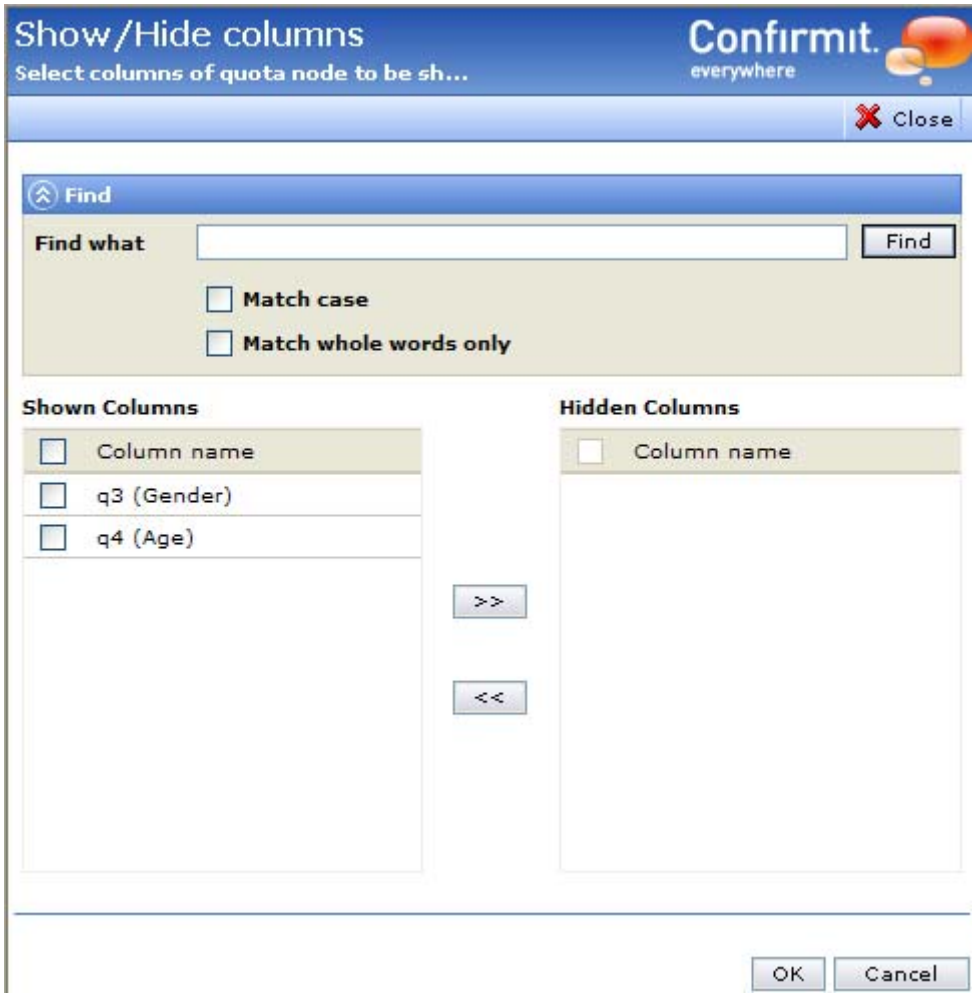


Figure 289 Example of the Show/Hide Columns window

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.

8.2. How to Define Quotas and Quota Forms

Quotas are set up in the questionnaire tree, which contains a "Quotas" folder 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. Drag the questions that are relevant for the quota from the Questionnaire Tree toolbox down to the Quotas folder, and drop them into the new quota object (drop them onto the object icon, not the text).

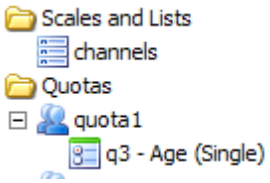


Figure 290 Adding quotas to a survey

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. Right-click on the new quota object and select **Edit** 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.

8.2.1. 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** the save the changes.
3. Click **Update** to synchronize the quota values with the database.

For example, in the illustration below, the user has specified that he/she wants a total of 25 males and 21 females in the 18 to 30 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.

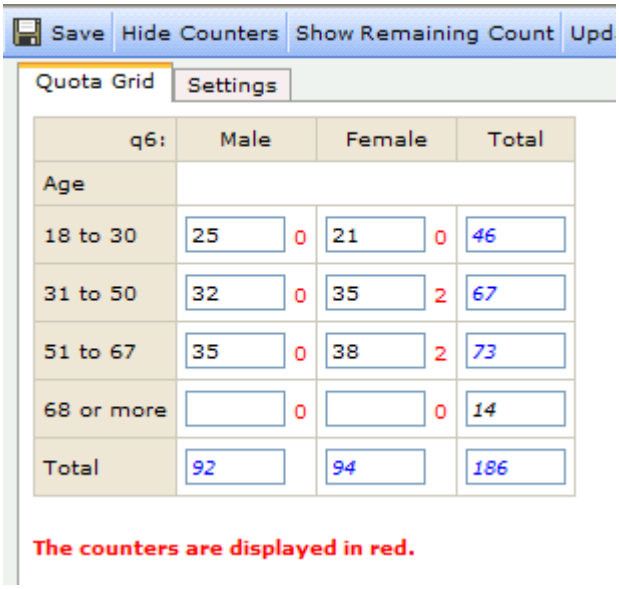


Figure 291 Combining subtotals and cell targets

To define a quota on the total:

1. Type a number into the required 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.

You can use a combination of setting totals on rows or columns and defining specific cells, as in the example above. Here the quota limit on the age group "68 or more" is set to 14 regardless of gender. Note that actual counts for totals will only be displayed for totals and subtotals that have be given a specific target (black number). Actual counts will not be displayed for calculated totals and subtotals (blue numbers).

The calculated totals will only take quota cells into account, not subtotals. The total (lower right corner) in the table above is therefore 186 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 not restrictions.

In the example below, where no specific limits are defined for respondents in the age group "68 or more", the survey may result in more than 186 respondents, as any respondent in the "68 or more" age group will be allowed to complete the survey.

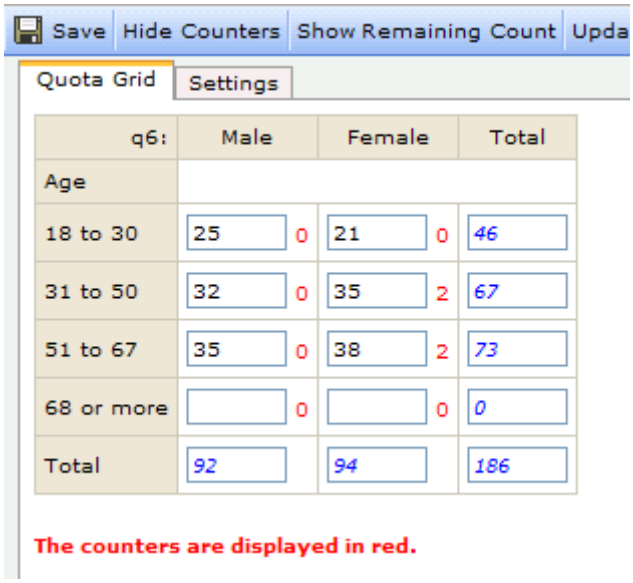


Figure 292 Quota definition with holes

You can specify a total number and allow the system to distribute this total evenly across the 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**.

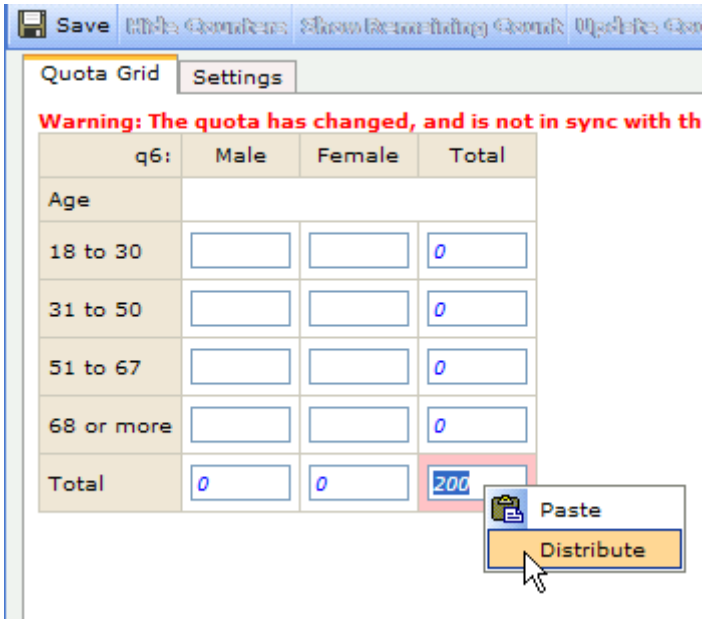


Figure 293 Distributing Quotas

8.2.1.1. 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**.

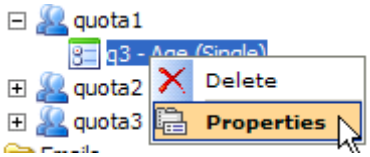


Figure 294 Opening Properties for the question inside the quota

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

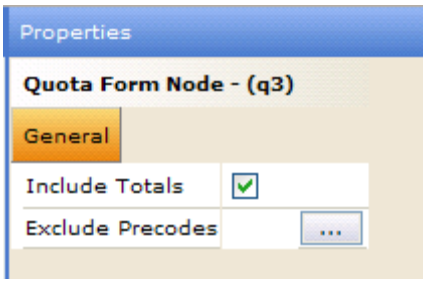


Figure 295 The Properties page for the question inside the quota

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.

8.2.1.2. 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 (go to The Grid View on page 216 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 Precodes** button.

   The Exclude Precodes window opens.

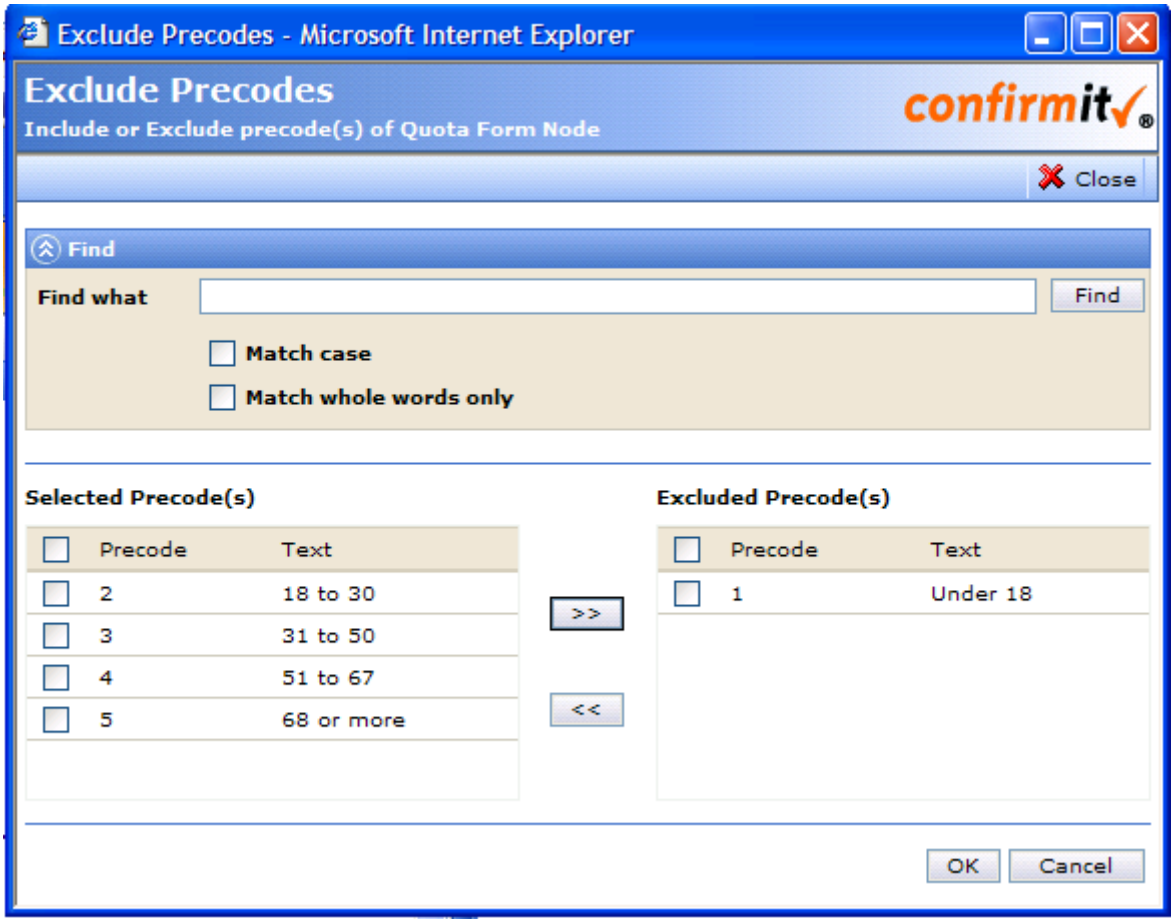


Figure 296 Excluding precodes/answers from the quota table

3. In the Selected Precodes column, check the boxes beside those precodes that you wish to exclude.
4. Click the **>>** button to move the selected precodes to the Excluded column.
5. Click **OK**.
6. Save the changes.
7. Click **Update** to apply the changes to the database.

The excluded precodes are hidden from the list in the table. To return them to the table, go to the Exclude Precodes window, select them in the Excluded column and click the **<<** button. Then click **OK**, **Save** and **Update**.

8.2.2. 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.

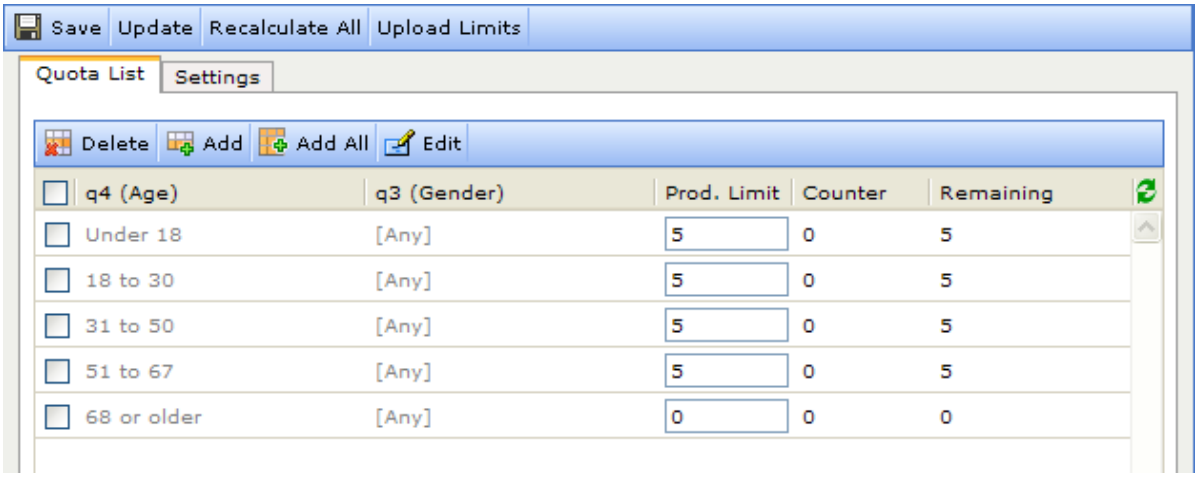


Figure 297 Example of a List View table

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.



Figure 298 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.

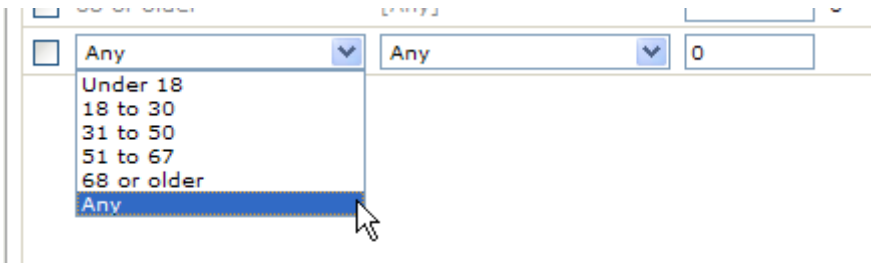


Figure 299 Selecting Any for the Age question

4. Make the appropriate selections for all the fields in the row.
5. To define the values, merely type the values into the appropriate cells.

6. Save the changes.

You can add all the possible quota options to the table in one operation. To do this click **Add All**. The number of quota rows that will be required is then calculated. If that number is above the server limit (default is 1000), then the combinations will not be displayed. If the number is within the limit, then all possible quota options are added to the table.

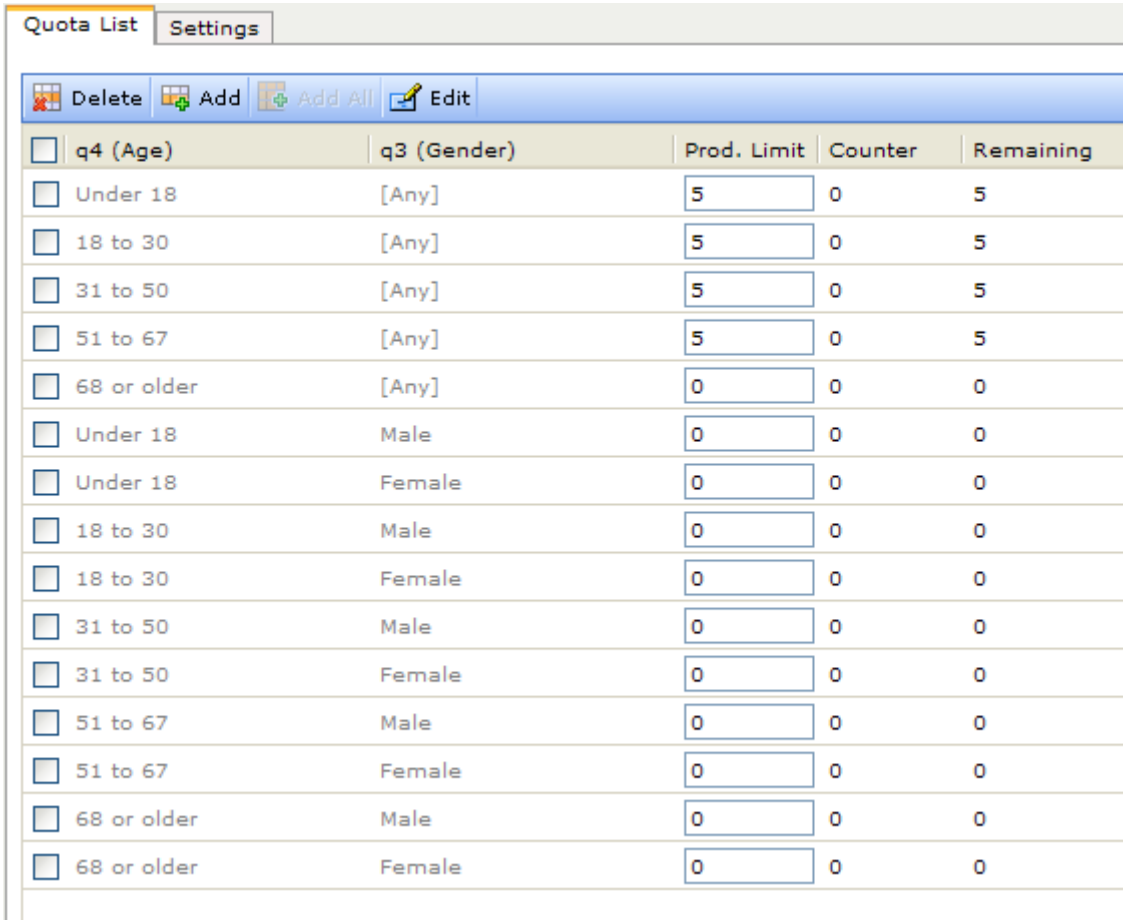


Figure 300 Example of the table after Add All is clicked

7. When you add rows to the table, either individually or by clicking **Add All**, and save the changes, you must then update the quota definition in the database. To do this, click **Update**.

8.2.3. Global Quotas

A quota that does not contain any forms can be used to define a global quota. A global quota is an overall target for the number of completes, irrespective of the respondents' answers on any particular questions. So if for example you want to end the survey after reaching 200 completes, and don't have specific targets for different sub samples, you can set up a global quota.

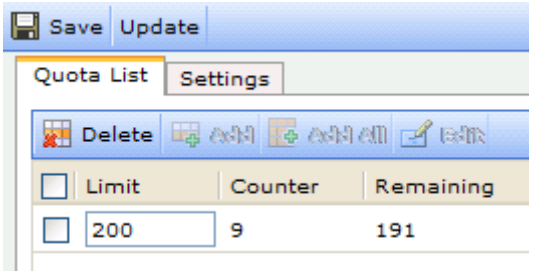
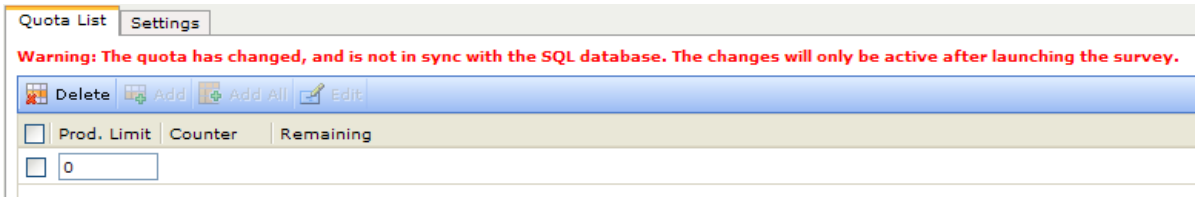


Figure 301 Global Quota

1. Drag a Quota object from the New Objects toolbox and drop it into the **Quotas** folder, or right-click the **Quotas** folder and select **Insert Quota**.
2. Right-click on the new quota object and select **Edit**, or double-click on it, to open the Quota Details page.

   An "empty" quota is displayed.
3. Click **Add**.

   A row is added to the table.



4. Type the total number of replies you want to receive, into the **Prod.Limit** field.
5. Save the changes.
6. Launch the survey to update the database.

8.3. 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.

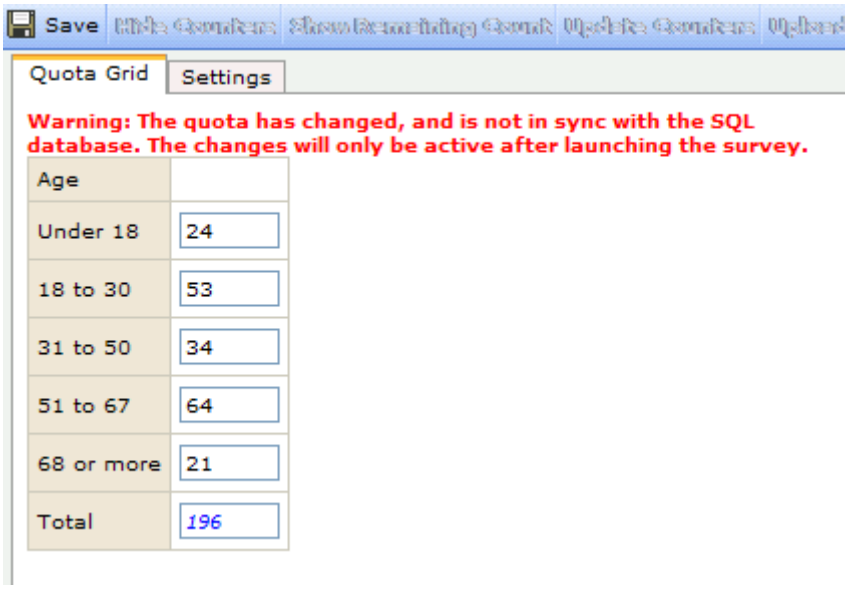


Figure 302 Uncompiled quota warning

Once a quota counter is compiled to the interview environment, the interview engine increments the quota counter every time a new interview is completed. If you add a new quota or add or remove questions in an existing quota, you must re-launch the survey.

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.

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 to test the new quota limits before updating them to the production environment. A warning will be displayed when there are changes in the quota limits that have not been updated in the database. The cells where the limits are not in sync will be highlighted with a gray background.

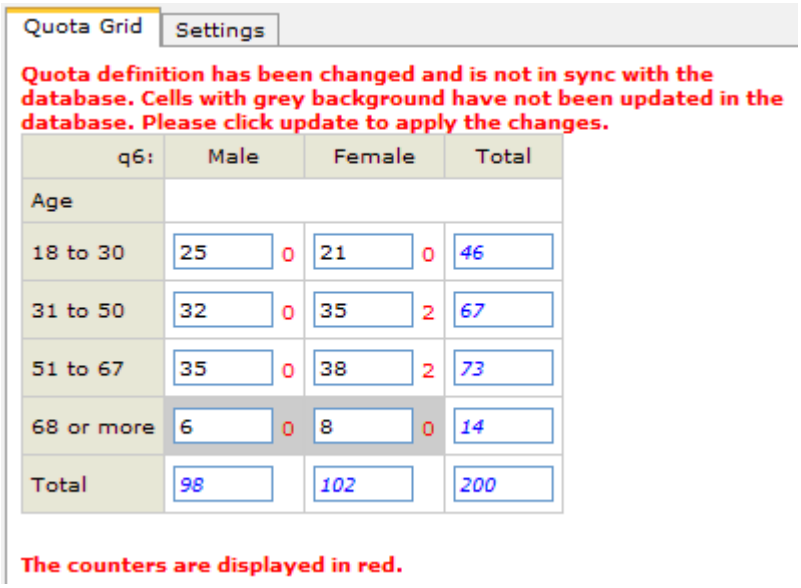


Figure 303 Changed Limits

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.

8.4. Uploading Quota Limits

Quota limits can be imported into a quota by using a tab-separated text file. There must be 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 (**question id** for single questions, **question id +_+ precode** for each element in a multi or grid), and for the limits 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 precode of the answer or [any] for Any response. For elements of a multi you can use c for Chosen and nc for Not chosen in addition to [any] or a for Any,

Examples:

1. If you have a Gender question (single) with ID "**q1**" and variables Male and Female with precodes **1** and **2** respectively, the quota upload file could look as follows:

q1	**_limit**
1	80
2	100

   Here, a limit of 80 complete responses is defined for male respondents and 100 for female.

2. If you have a Car question (multi) with ID "**q3**" and variables **Volvo**, **Saab**, **BMW**, **Audi**, and **Ferrari** with the precodes 1, 2, 3, 4 and 5 respectively, the quota upload file could look as follows:

_limit	**q3_1**	**q3_2**	**q3_3**	**q3_4**	**q3_5**
50	[any]	[any]	c	[any]	[any]

   Here a limit of 50 responses is defined for the respondents who choose BMW. (For multi questions, **a** could be used instead of **[any]** to indicate Any response.)

3. If you have a Car Quality Ranking question with ID "**q4**", with the variables **Speed**, **Safety**, **Sunroof** and **Color** with the precodes 1, 2, 3 and 4 respectively, and a Scale of Poor 1, 2, 3, 4, Excellent 5 with corresponding precodes, 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 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.

To upload the file:

1. When you have created the upload file, click the **Upload Limits** button.

   The Select File dialog opens.

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

2. Browse for the file you want to upload

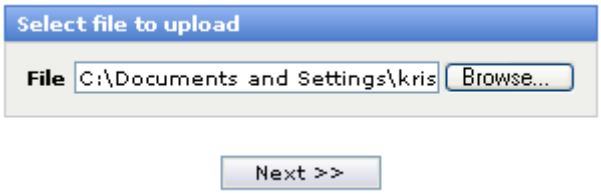


Figure 304 Selecting the file to upload

3. Select the file and clicked the **Next** button.

   The Quota upload properties page is displayed.

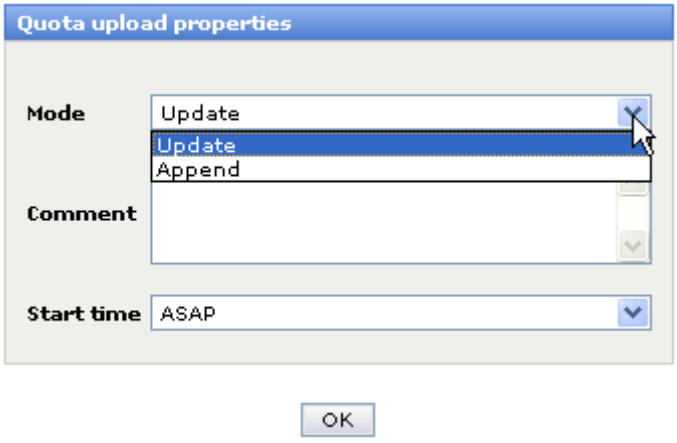


Figure 305 Quota upload properties

4. On this page, define whether the current file should be added to the existing quota limits in the quota, or whether the existing quota limits should be updated with the data in the upload file.

- If you select **Append**, existing quota cells will not be updated and new quota cells will be added.
- If you select **Update**, existing quota cells will be updated and new quota cells will be added.

5. Click **OK**.

The task is added to the Task queue and can be found under **Task Management**.

8.5. 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.

8.6. 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.

8.7. Email Alert on Full Quota

If you wish to be notified every time a quota cell is full (reaches its target), enter an email address on the Settings tab. If you would like the alerts to be sent to several email addresses, enter all in the "Quota full email" field, separated by semi colon.

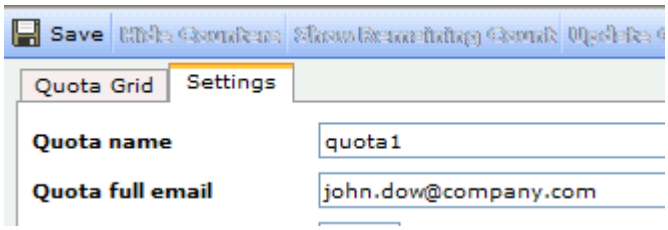


Figure 306 Setting up the quota full email

The quota full email will be sent when the **qf** function (go to Terminating the Interview for Respondents when Quota is Full on page 232 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.

8.8. 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".

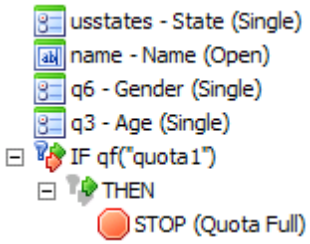


Figure 307 Quota Condition

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:

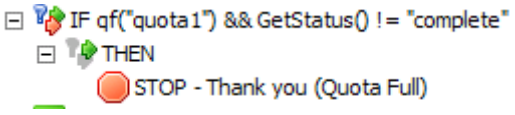


Figure 308 Quota Condition with check on Interview Status

8.9. Deleting Quotas

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

9. 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.

9.1. 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:
  - It is then possible to refer to the same list (for example a list of brands) from different surveys.
  - You can update the list dynamically without having to edit the questionnaires.
  - You can instantly apply the changes to all surveys where the list is used.

  The list can be changed outside the surveys, and the changes can then be implemented without having to recompile and regenerate the surveys. This gives major improvements when working with long answer lists, both when compiling and generating the questionnaire, and for the respondents.
- **Hierarchical lookup –** where you can define hierarchy structures with any number of 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: The answer lists in both Table lookup and Hierarchical lookup are limited to a maximum of 500 alternatives. This is a Confirmit server setting, so companies running their own servers can change the limit. However increasing the limit will affect system performance.

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

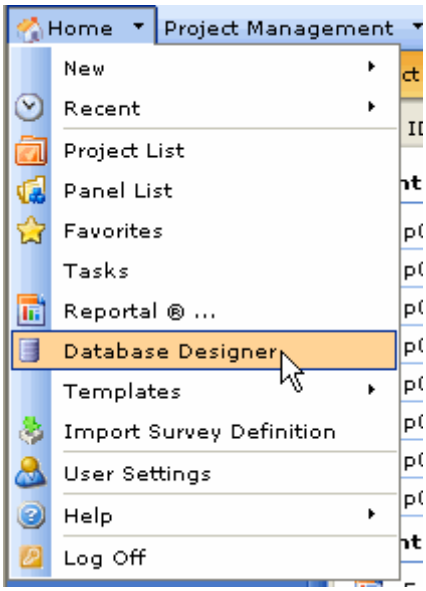


Figure 309 Entering Database Designer

When you access Database Designer, the window lists all the schema available. Note that in the event the list is extensive, you can search and sort it on the Schema ID and the Schema Name.

9.2. 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**.

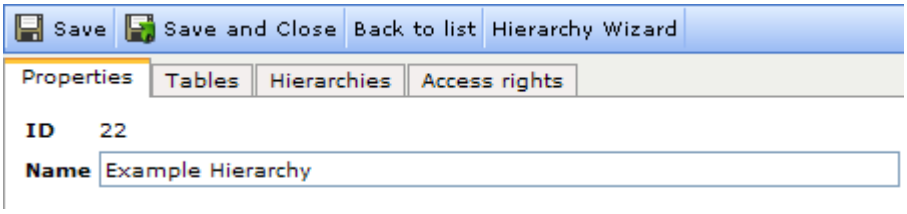


Figure 310 Creating a new schema

A new, empty database is set up and assigned an ID, and the remaining tabs and buttons become available.

9.2.1. Inserting a New Table

To set up tables within this database:

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

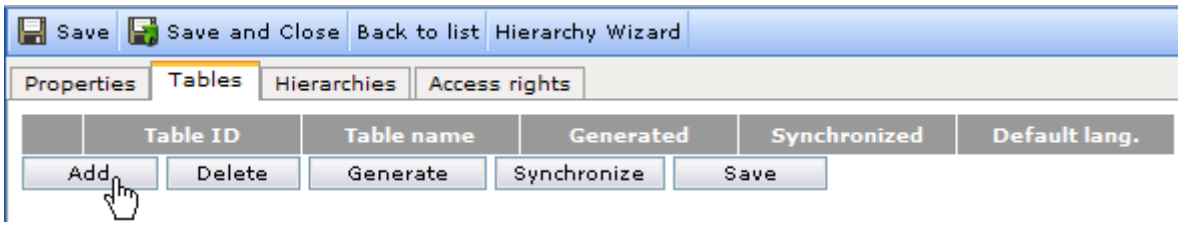


Figure 311 Adding a table to the database

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 312 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.

9.2.2. Table Properties

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 also specify the field width (number of characters) of the *primary key* of your table. The primary key is the unique identifier for the elements in the table (similar to the precodes 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.

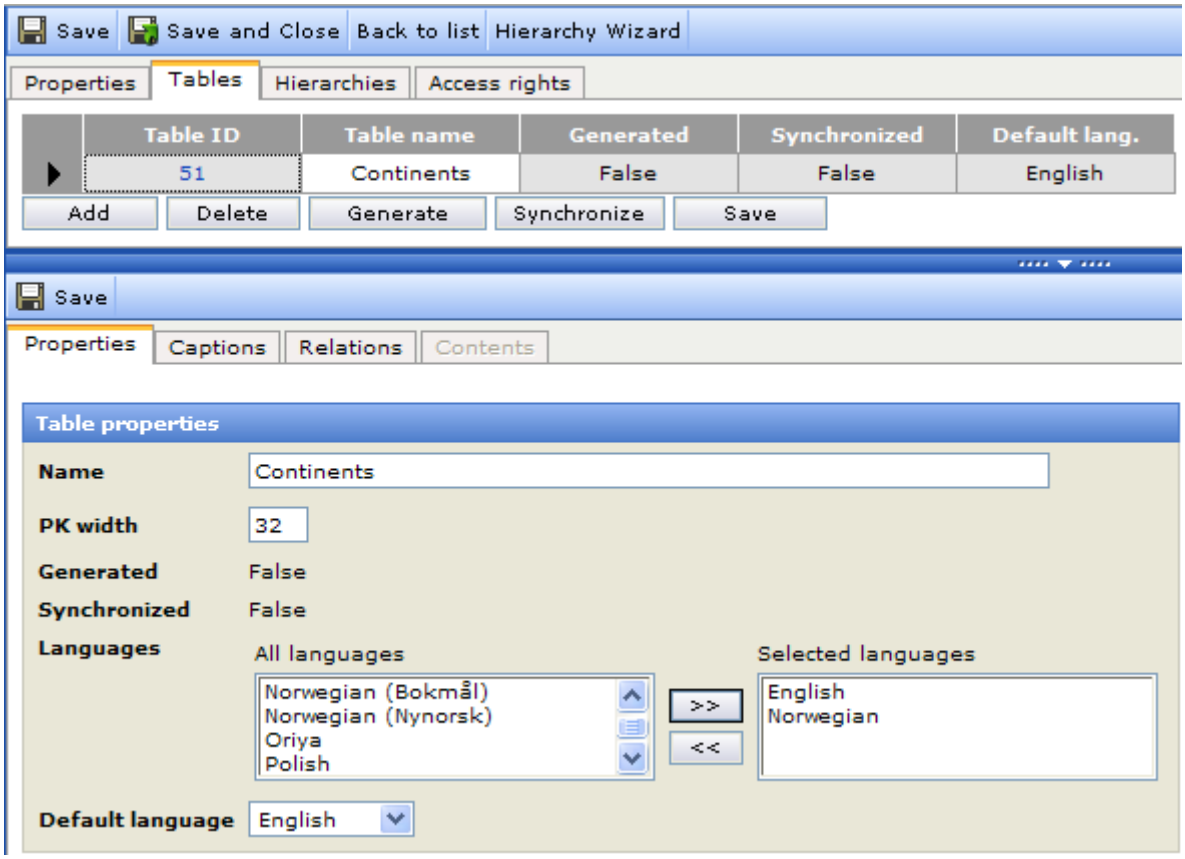


Figure 313 The table Properties tab

Note: After the table is generated, you cannot modify the setting on the primary key width.

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.

9.2.3. Captions

Go to the **Captions** tab to specify the table names for the list in the various languages you have selected. 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.

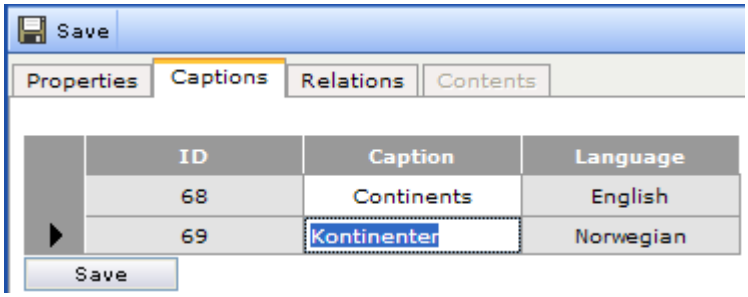


Figure 314 The Captions tab

9.2.4. Generating 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 left margin next to it.
2. Select **Generate**.



Figure 315 Generating the table

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

Once the table is generated, the **Contents** tab in table details will be enabled, allowing you to edit the table content.

9.2.5. Editing Table Contents



Figure 316 Adding content to the table

1. Click **Add** to insert a new row in the table.

   You can enter fields one by one, or if you have the columns in the same order in Excel or a tab-separated file, you can copy and paste in the entire list.

2. When you have completed the changes click **Save**.

   The **Number of rows** is updated, and the ID codes are locked.



Figure 317 Modifying the table contents

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.

9.3. Synchronizing Between Design and Runtime Modes

As the tables you set up in the database designer are used dynamically by Confirmit questionnaires, you may need 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”. Runtime is the “live” table being used in the surveys, i.e. the content as the respondents see it. After you have entered content in your table, you must transfer the content to the runtime mode. To do this:

1. Select the table in the table list.
2. Select **Synchronize**.



Figure 318 Synchronizing the table

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

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

   The “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.

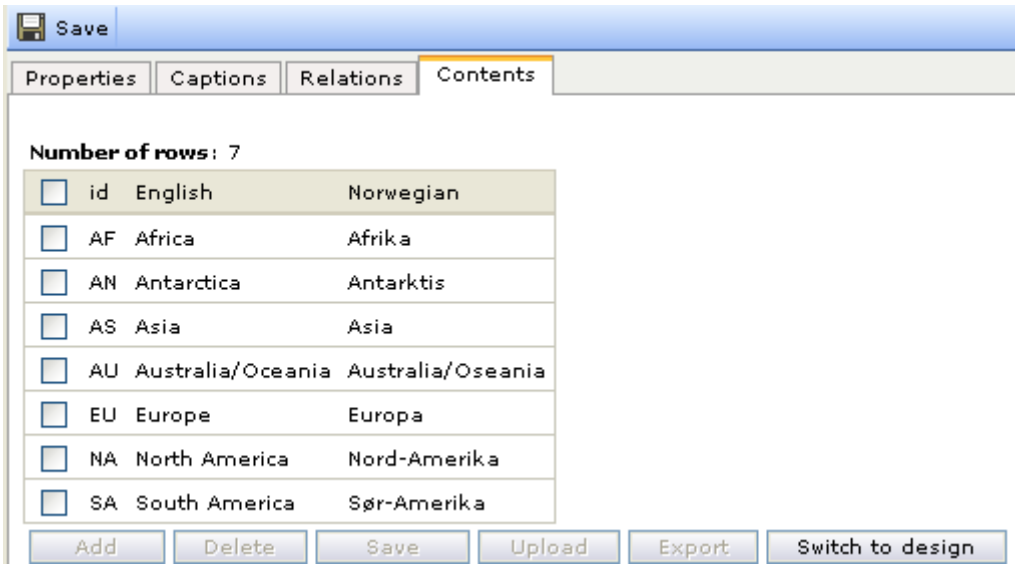


Figure 319 Runtime mode

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.

9.4. 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.

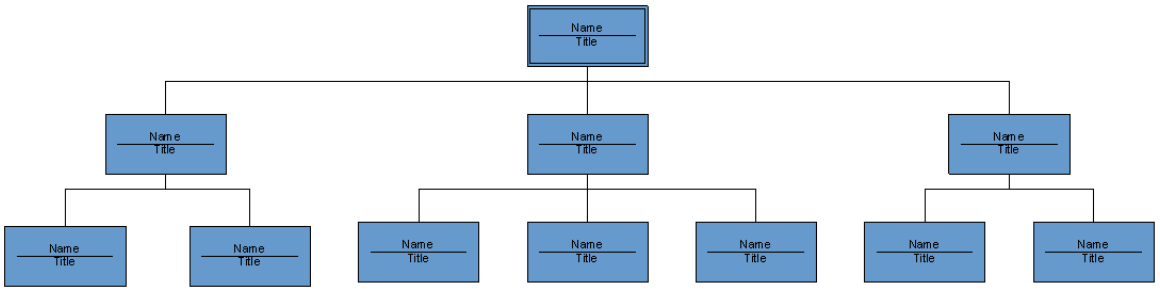


Figure 320 Example of a Balanced hierarchy

In a **balanced** (snowflake / non self-referencing) hierarchy every possible path from the top to the bottom of the tree goes through exactly the same number of levels (as with the three levels in the figure above). Such a hierarchy is set up with a table for every level in the tree, and then the relationships between the items are defined through a relation between a table representing a specific level and the table representing the level above. The respondents have to select from the entities at the lowest level. An example of this is the relationship between continents and countries (go to Balanced Hierarchy on page 240 for more information).

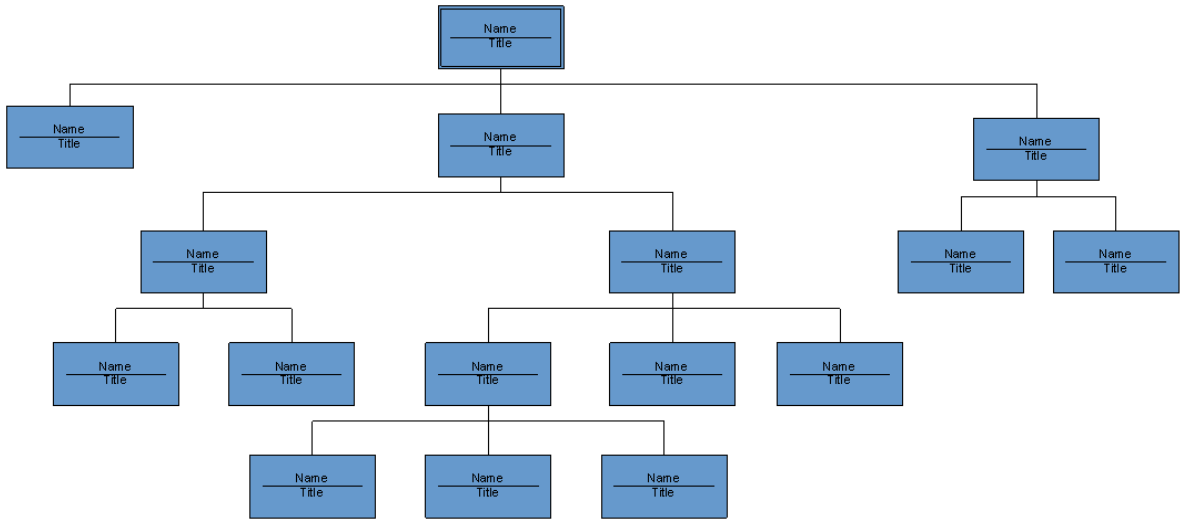


Figure 321 Example of an Unbalanced hierarchy

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 above. 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 organization hierarchy.

9.4.1. Balanced Hierarchy

If you want to set up a balanced hierarchy, you must first have a schema in which the hierarchy is to be created (go to Creating a Schema on page 235 for more information), then 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** in the table list.
3. Type the name of the table into the Table Name field.



Figure 322 Adding a table

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

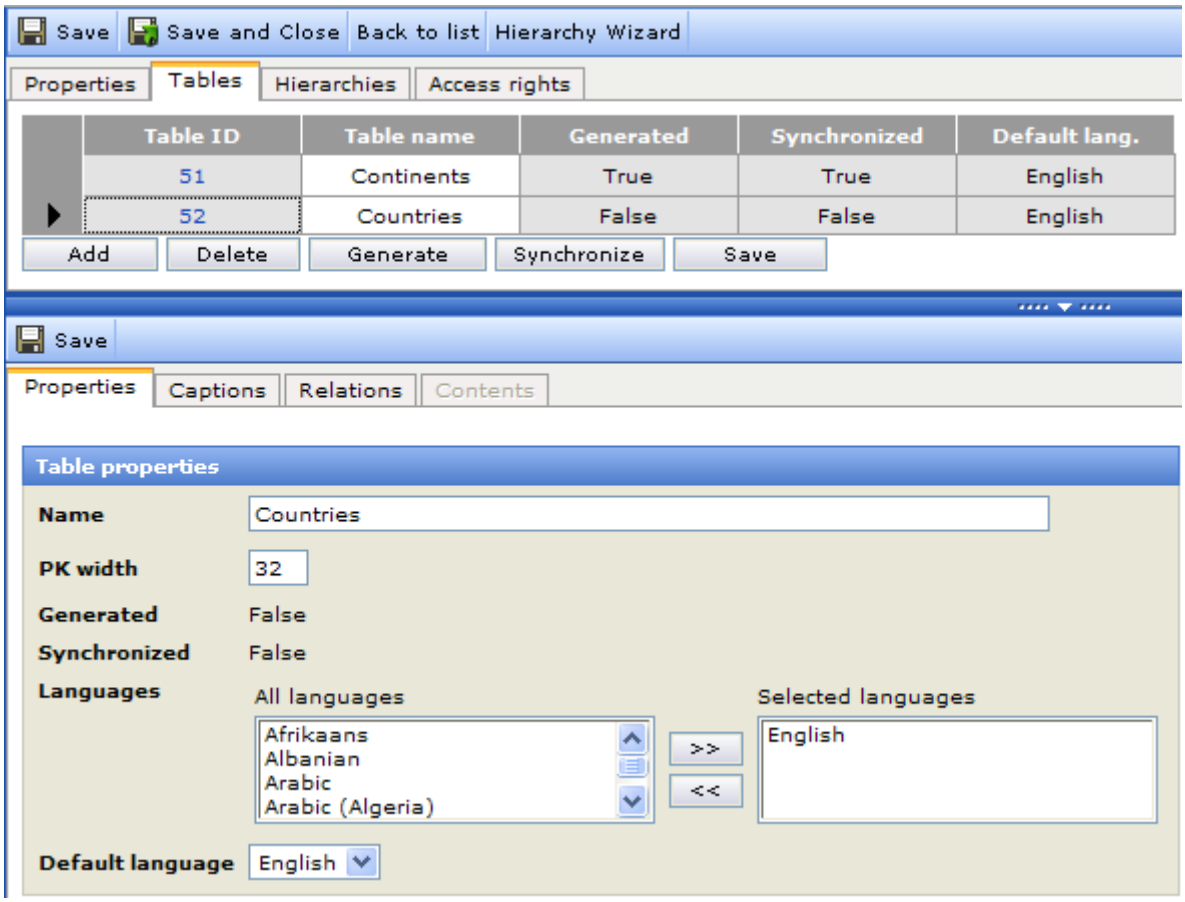


Figure 323 The table properties

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



Figure 324 The Captions tab

In the Relations tab you can specify the relationship between the tables. In this example, countries should belong to continents, i.e. “Continents” would be the “parent” and “Countries” the “child”.

8. For the Countries table, go to the Relations tab.
9. Click **Add** to set up a relationship, and give the relation a name (in this case “r1”).
10. Click in the Parent Table field to open a drop-down list of the available "parents", and define “Continents” as the parent table:

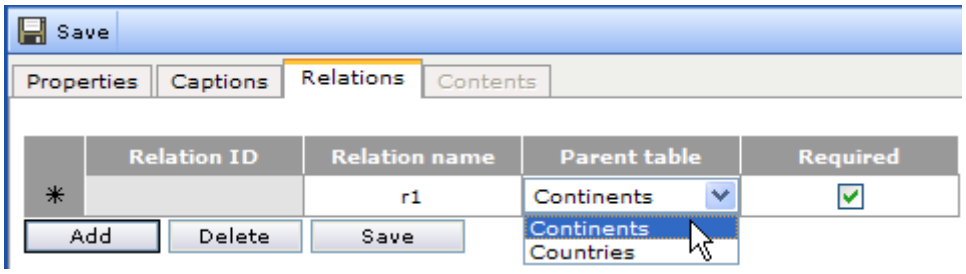


Figure 325 Setting up Relations

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.

The relationship name will be used as a column name in the table, so use alphanumeric characters and underscore only in the relationship name.

11. Save the relationship, then generate the table by selecting it in the table list and clicking **Generate**.

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 id and the languages.

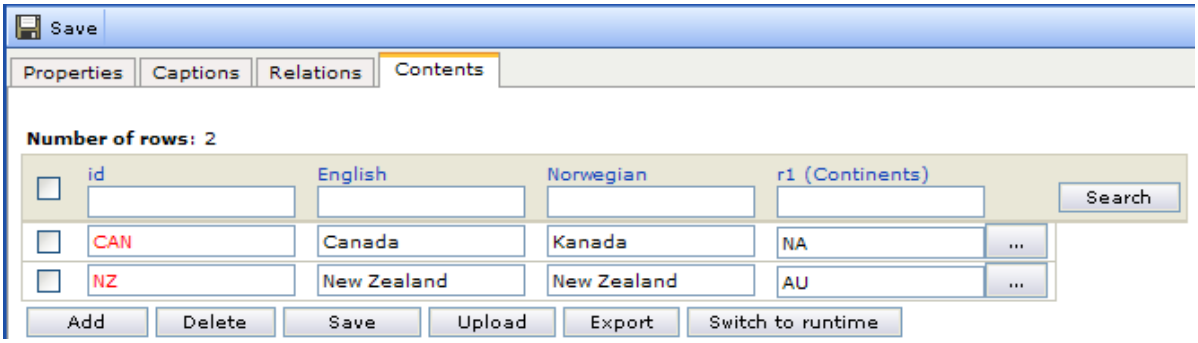


Figure 326 Table contents

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 button next to the relationship field to search from the list in the “Continents” table.

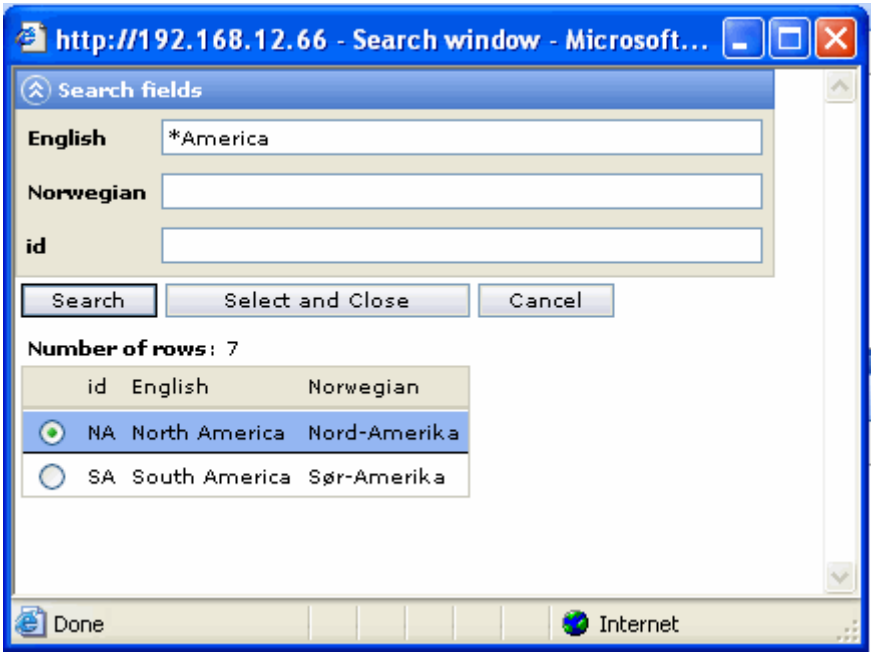


Figure 327 The Search window

Search in the text fields in the different languages using * as wildcard. If you leave the search fields empty, the entire list will be presented. Select one of the items and click **Select and close**. When finished with the entire list, click **Save** and then synchronize the table.

You could then add regions or cities as the next levels in the hierarchy in another table, though 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 Table list, go to the Hierarchy tab.
2. To add a new hierarchy, click **Add**.
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 328 Adding a hierarchy to the database

In “Hierarchy structure” you select the hierarchy from the available relationships set up in the database by selecting a “child” or “sub”-node at any level within the tree except the top level. Here select our 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.

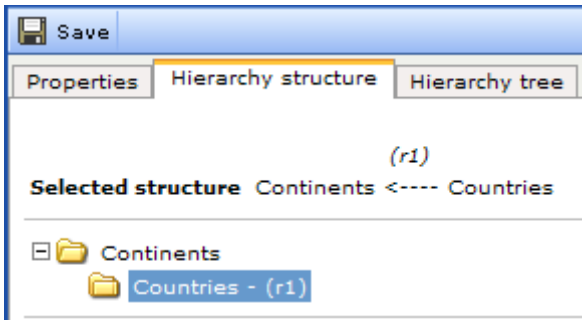


Figure 329 The Hierarchy structure

9.4.2. 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:

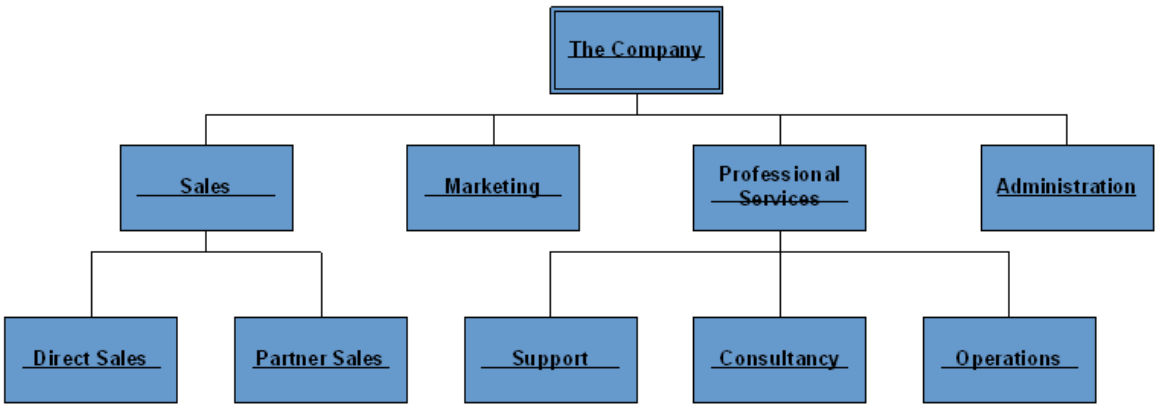


Figure 330 Example of organization hierarchy in "The Company"

This hierarchy will be set up in the table “companytable”.

1. In the Database Designer, create and save a new schema (go to Creating a Schema on page 235 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 331 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 332 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 any entity to refer to above it.

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.

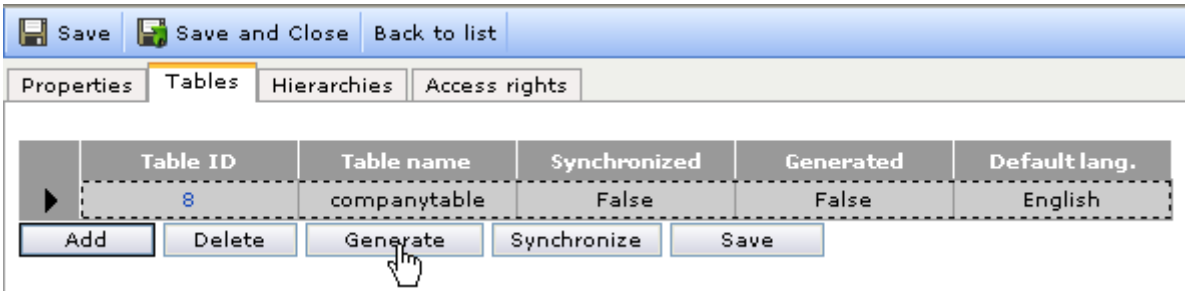


Figure 333 Generating the table

8. Then go back to the table (click on the Table ID) to define the table content.
9. In the Contents tab, set up the hierarchy of “The company” with the following table:

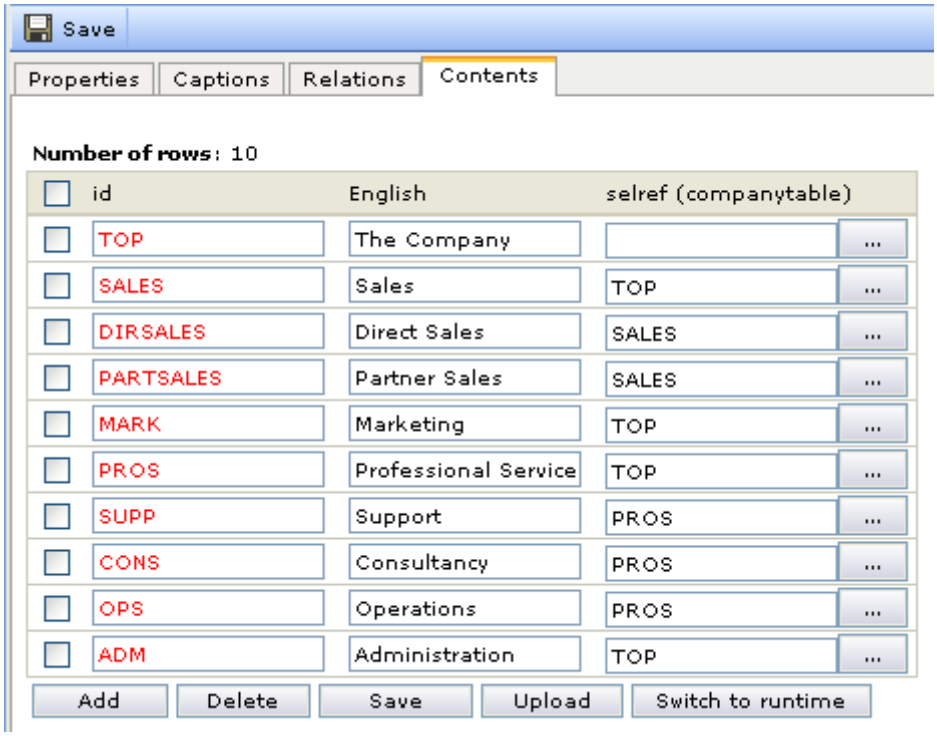


Figure 334 A self-referencing table

10. To get this set up as a hierarchy, select the Hierarchies tab in the schema designer, click **Add** to add a hierarchy, give the hierarchy a name and then click **Save**:

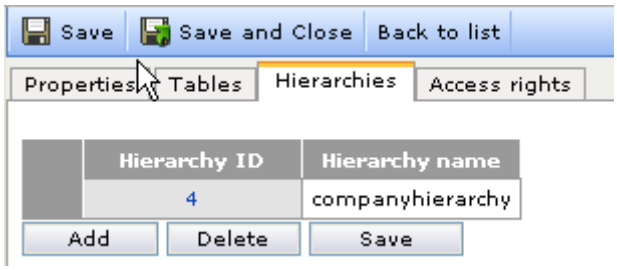


Figure 335 Adding hierarchy

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

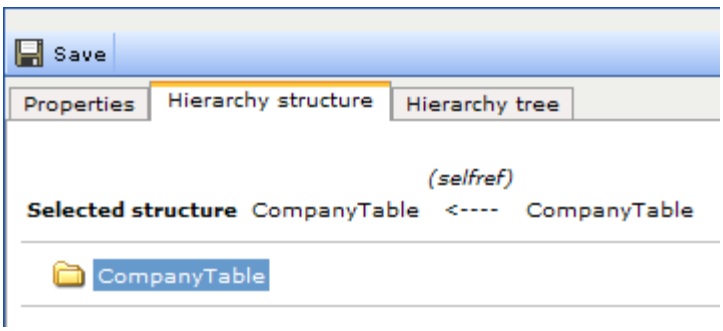


Figure 336 Selecting relations in the hierarchy

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

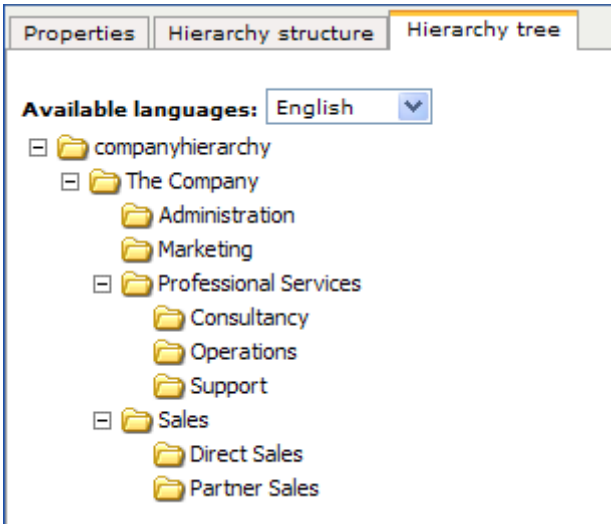


Figure 337 Example of the Hierarchy Tree tab

Here you can rearrange the nodes in the hierarchy by dragging and dropping them as required, and select the display language.

9.4.3. 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.

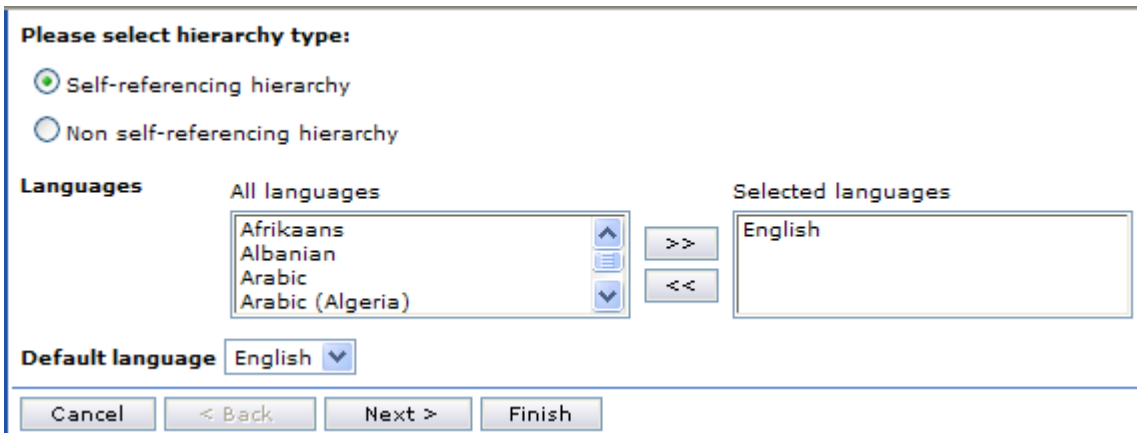


Figure 338 The first step in the Hierarchy Wizard

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.

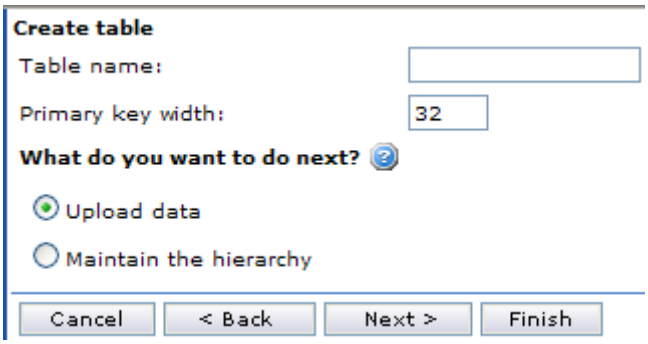


Figure 339 Step two in the Hierarchy Wizard

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 (go to Balanced Hierarchy on page 240 for more information).

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

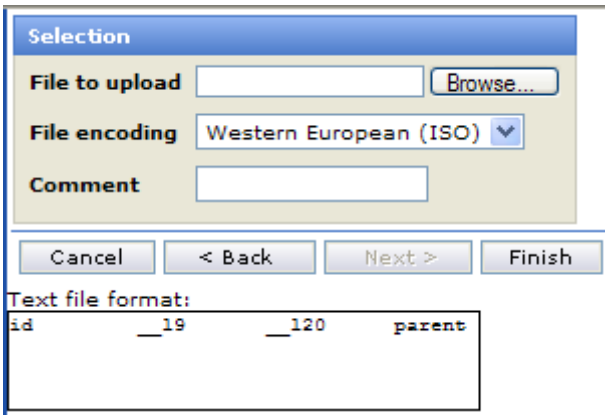


Figure 340 The wizard file selection dialog

Browse to and select the desired file, select the appropriate encoding format and click **Finish** to complete the procedure (go to Uploading and Exporting Table Contents on page 248 for more information).

9.5. Uploading and Exporting Table Contents

If you have a long list, you may wish to upload it as a file instead of entering the items individually via the interface. To do this:

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** button, as shown below.

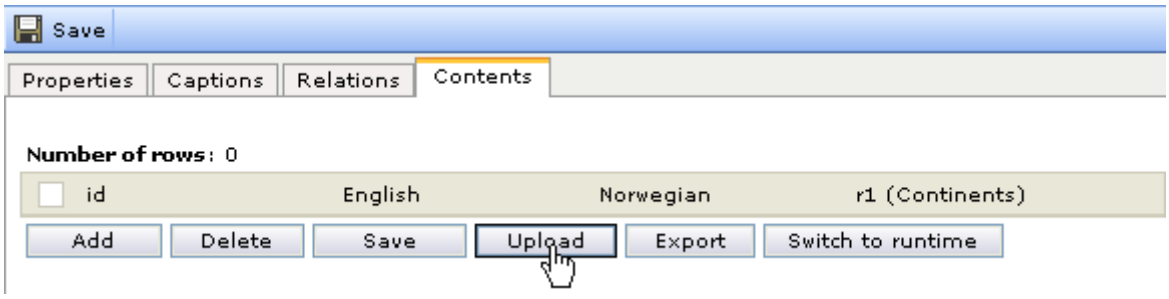


Figure 341 Uploading a list

3. Browse for the file or enter the path directly, and click **OK**.

   The file is uploaded to the server.

You are now presented with three options for how the file is to be uploaded.

- **Cancel** - aborts the process and leaves the table unchanged.
- **Overwrite** - removes current content and replaces it with the contents of the file.
- **Append/update** - merges the current 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.



Figure 342 The File upload dialog

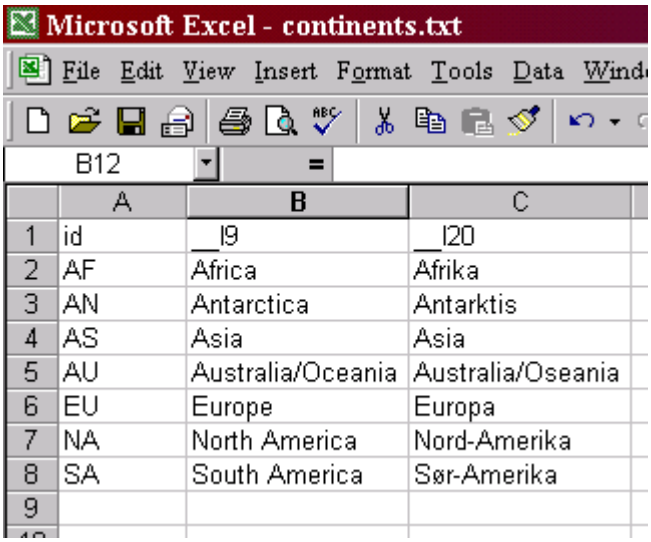
If you select either append or update, a task will be queued on the Confirmit batch server. When the task is executed, the content of the file will be inserted into the table in the manner specified.

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.

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 (go to APPENDIX B: Confirmit LANGUAGE CODES 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.

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



Microsoft Excel - continents.txt

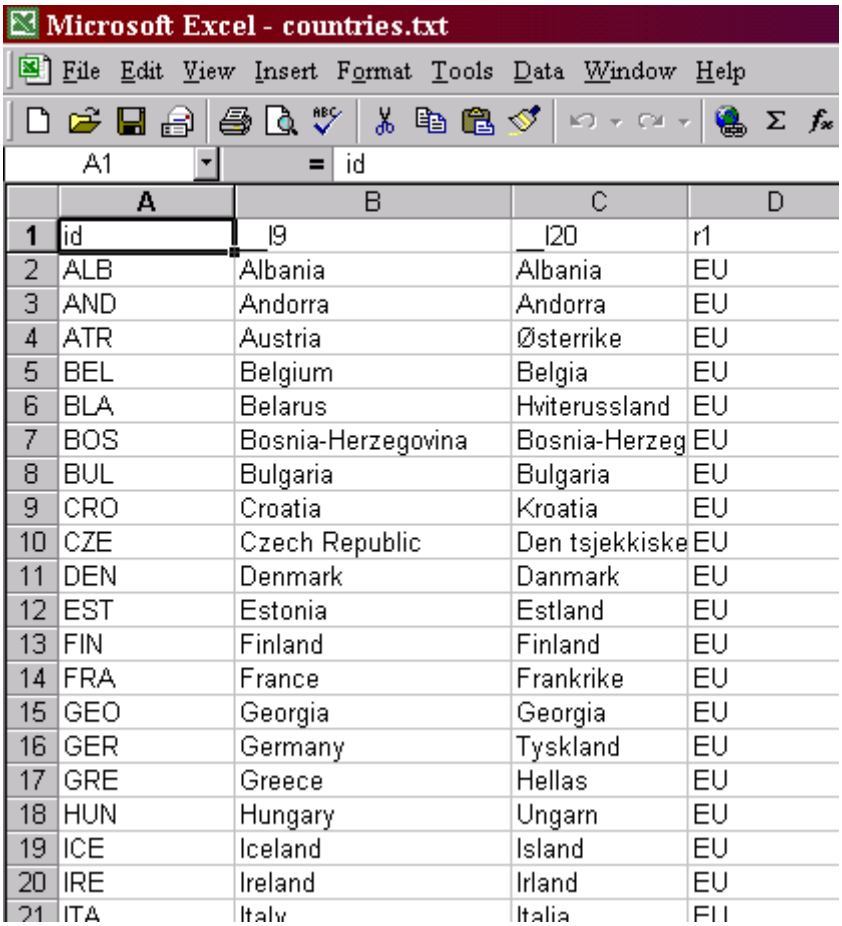
File Edit View Insert Format Tools Data Wind

B12 =

	A	B	C
1	id	__l9	__l20
2	AF	Africa	Afrika
3	AN	Antarctica	Antarktis
4	AS	Asia	Asia
5	AU	Australia/Oceania	Australia/Oseania
6	EU	Europe	Europa
7	NA	North America	Nord-Amerika
8	SA	South America	Sør-Amerika
9			

Figure 343 Continents file

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



Microsoft Excel - countries.txt

File Edit View Insert Format Tools Data Window Help

A1 = id

	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	BEL	Belgium	Belgia	EU
6	BLA	Belarus	Hviterussland	EU
7	BOS	Bosnia-Herzegovina	Bosnia-Herzeg	EU
8	BUL	Bulgaria	Bulgaria	EU
9	CRO	Croatia	Kroatia	EU
10	CZE	Czech Republic	Den tsjekkiske	EU
11	DEN	Denmark	Danmark	EU
12	EST	Estonia	Estland	EU
13	FIN	Finland	Finland	EU
14	FRA	France	Frankrike	EU
15	GEO	Georgia	Georgia	EU
16	GER	Germany	Tyskland	EU
17	GRE	Greece	Hellas	EU
18	HUN	Hungary	Ungarn	EU
19	ICE	Iceland	Island	EU
20	IRE	Ireland	Irland	EU
21	ITA	Italy	Italia	EU

Figure 344 Example of a Countries file

To export the table contents, click the **Export** button in the “Contents” page. You will then be presented with options for how the file is to be exported. The file will be exported to Tab delimited text format. There you will be able to modify the table contents and upload it back into the database designer again.

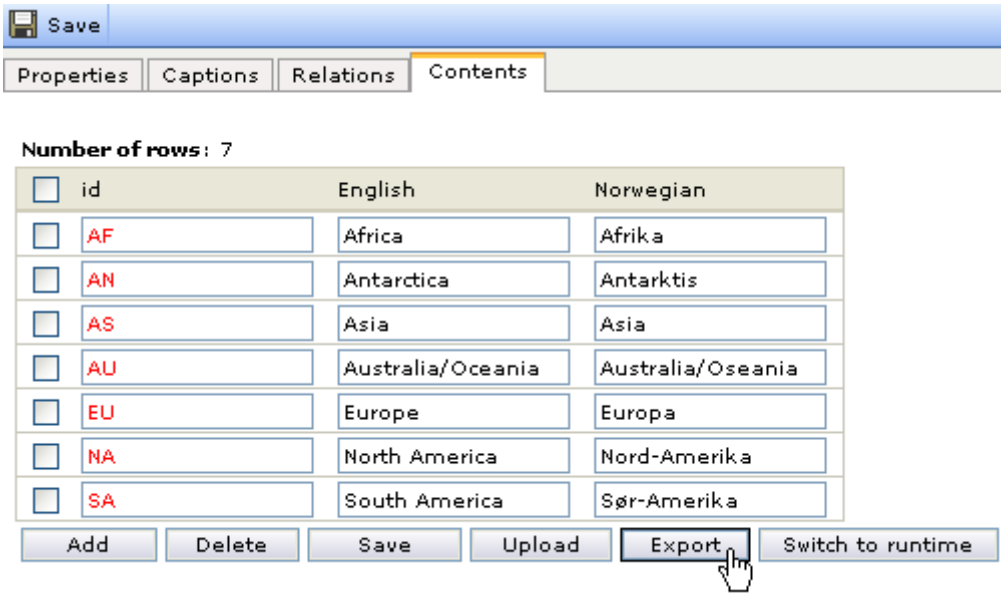


Figure 345 Exporting the table contents

9.6. Access Rights

In the “Access rights” tab of the database schema, you may give other Confirmit users access to the database you have set up. There are three levels of access:

- **Read:** You will be able to study the database you have set up and will have access to using the tables and hierarchies in it in his/her questionnaires
- **Write:** You can also modify the tables and hierarchies in the database.
- **Delete:** You can also delete tables and hierarchies in the database.

In addition you can give the user “Schema administrate” rights on the database schema. The user will then be able to give other users access.

9.7. 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**.

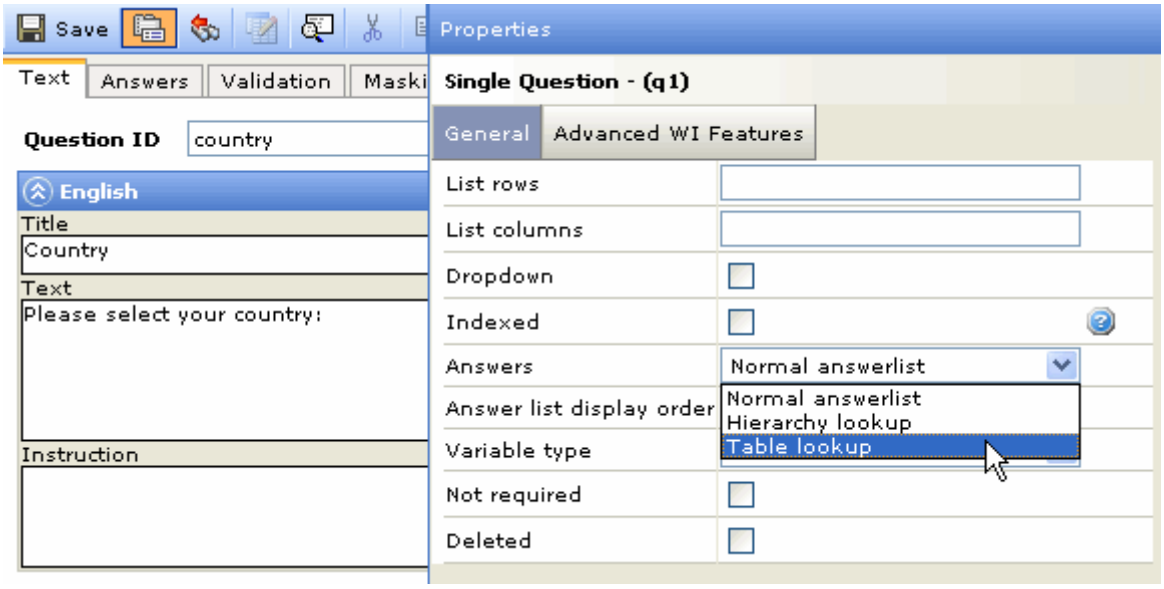


Figure 346 Selecting the desired Answers property

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.

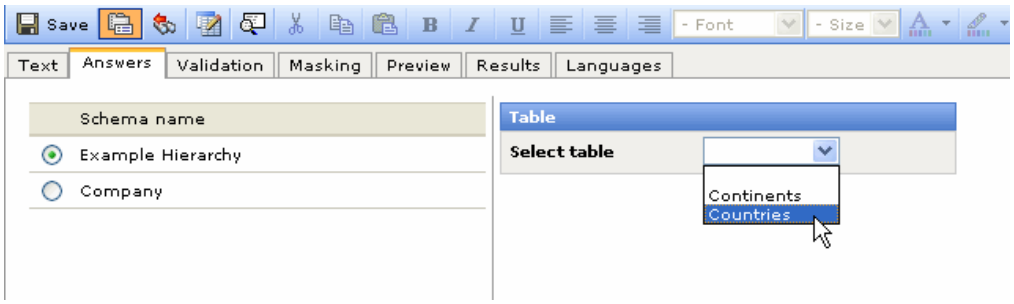


Figure 347 Selecting the table for "Table lookup"

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 (go to Hierarchies on page 239 for more information).

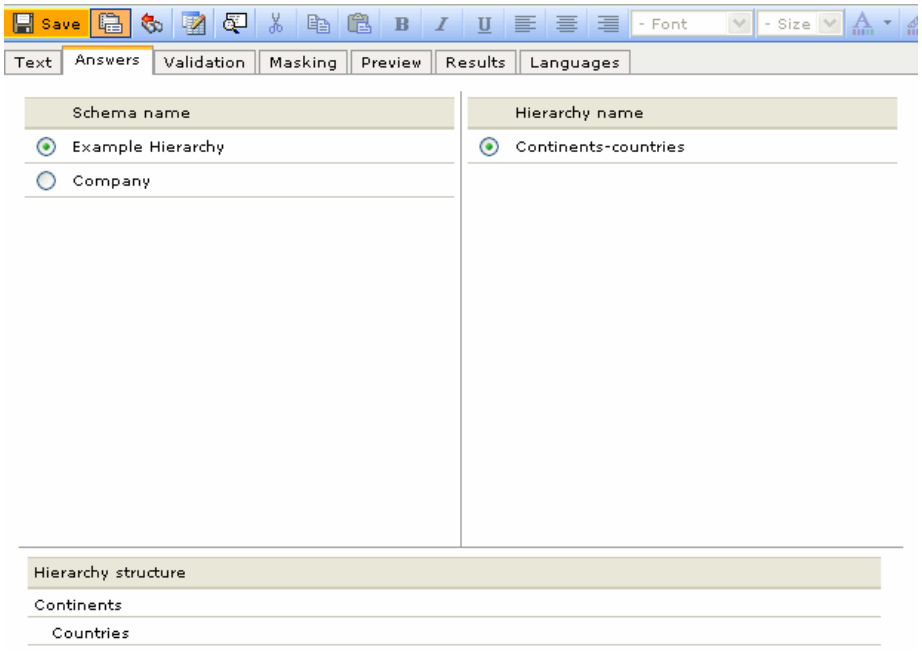


Figure 348 Selecting the Hierarchy for a "Hierarchy lookup" question type

The "Hierarchy Lookup" question type provides a special interface for the respondent - the question is presented as a series of option lists, and the respondent clicks on the appropriate item in the list to select it. As the respondent makes a selection, the "sub-options" available for that selected option are displayed, enabling the respondent to choose further. The "path" to the currently selected answer is displayed above the list, enabling the respondent to keep track of his/her current position in the hierarchy. The answers in all levels of the hierarchy are sorted alphabetically.

Note: This functionality requires that the respondent has a JavaScript-enabled browser. Recommended browsers are IE5, Netscape 6, Opera 7 or Mozilla.

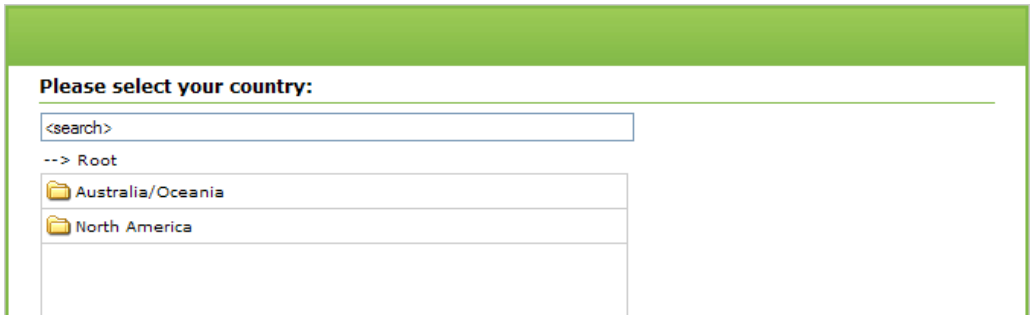


Figure 349 Example of the Respondent interface for a hierarchical question

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.

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:

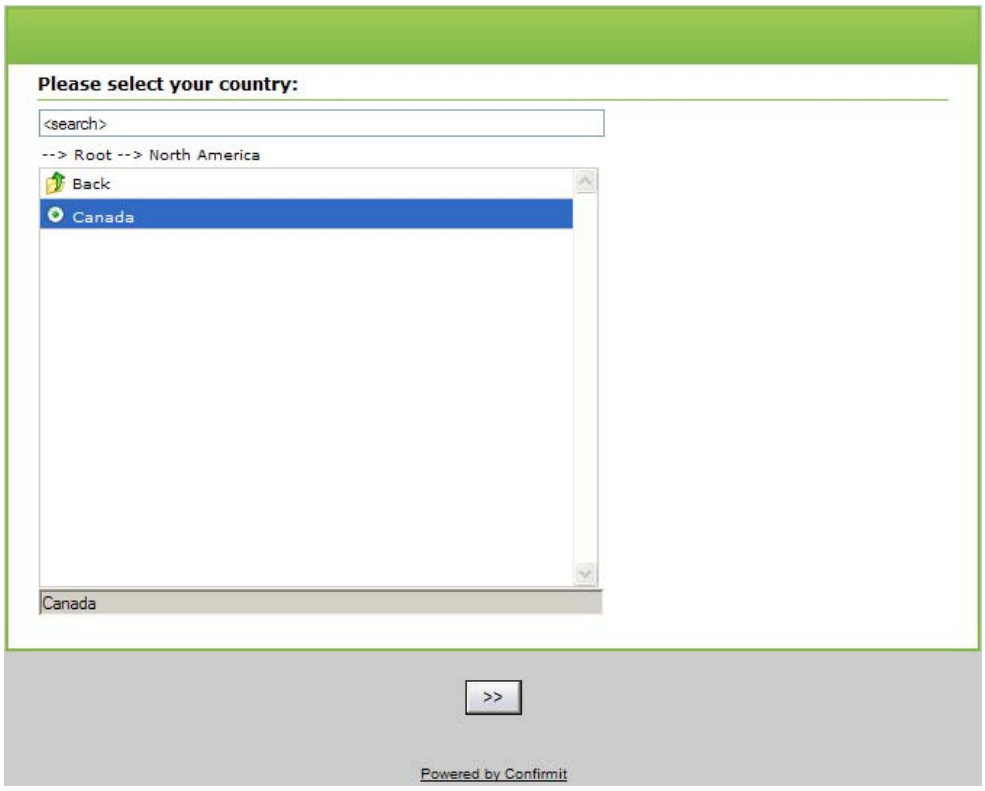


Figure 350 An item is selected on a hierarchical question

10. 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.

10.1. 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:



Figure 351 The warning that appears when the project is not multilingual

10.2. 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.*

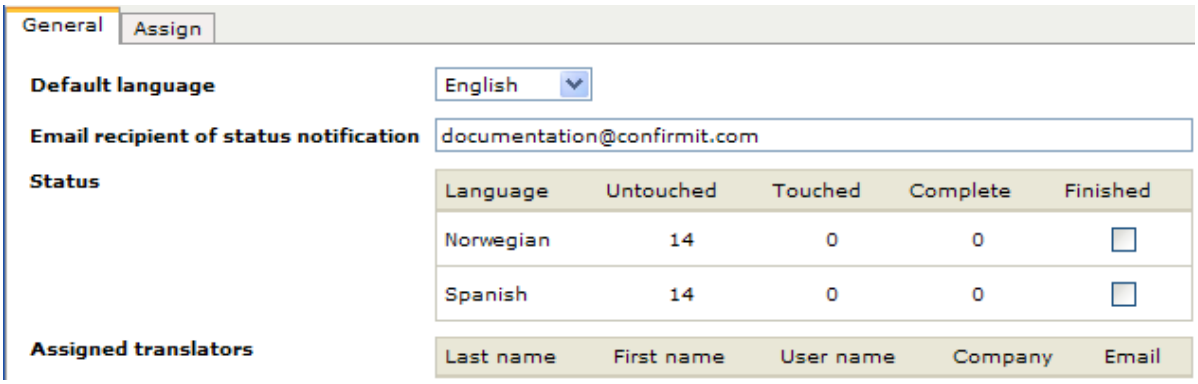


Figure 352 Translation overview with no assigned translators

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.

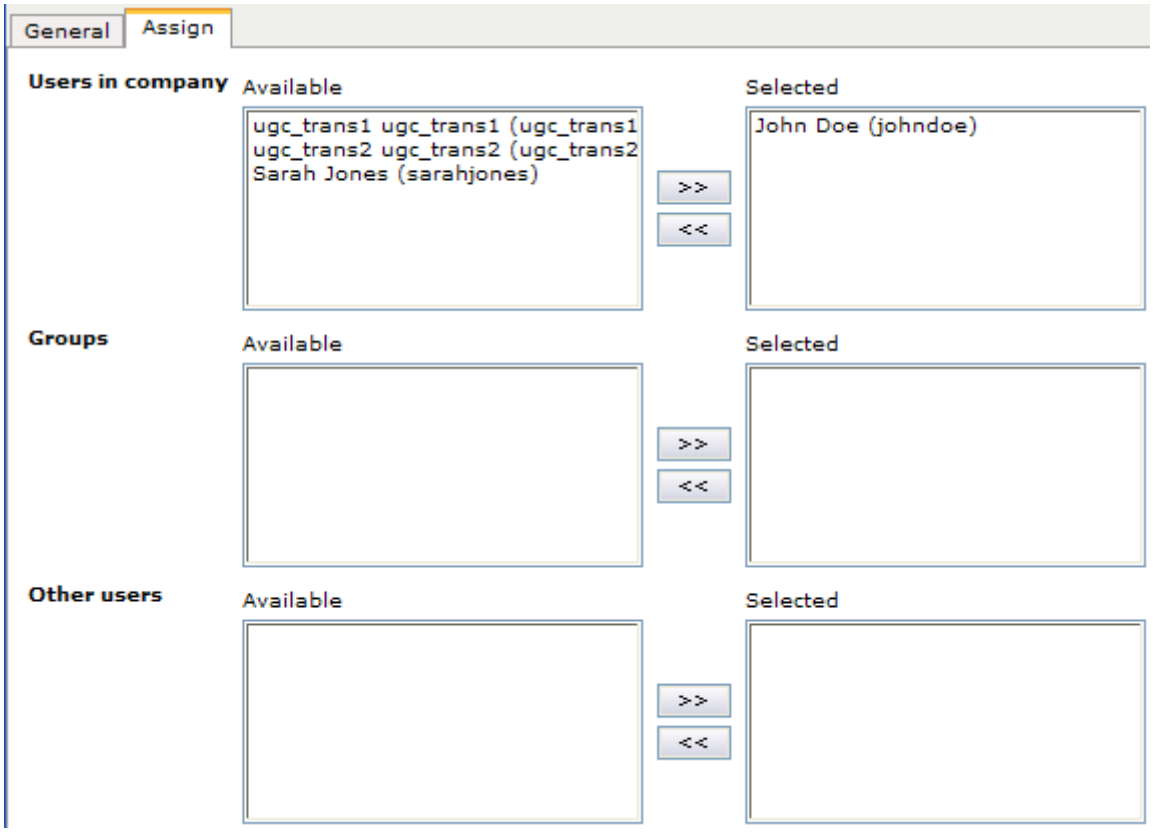


Figure 353 The Assign tab

If you return to the Translator Settings page after having select the translators, the translators will be displayed in the Assigned translators window as shown in the example below.

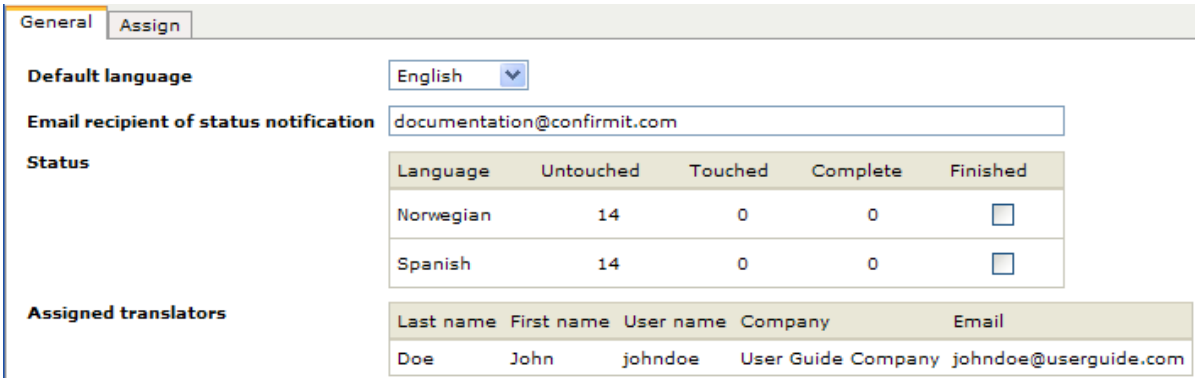


Figure 354 Example of the Translator Settings page with assigned translators

10.2.1. 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 uses permission to view and/or edit the project (go to Permissions on page 136 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.

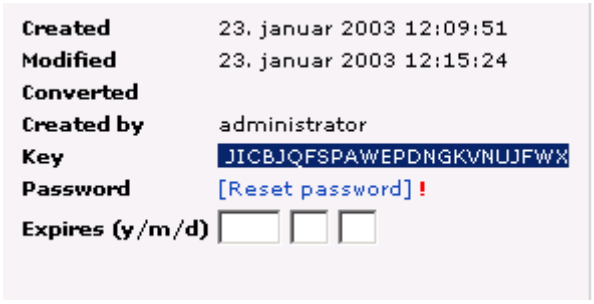


Figure 355 Copying a user key

2. Go to the Project Overview page for the project, and click the Permissions tab.
3. Scroll to the bottom of the page and click the **Add other users** link.

   A text input field appears.
4. Paste the User key into the field.

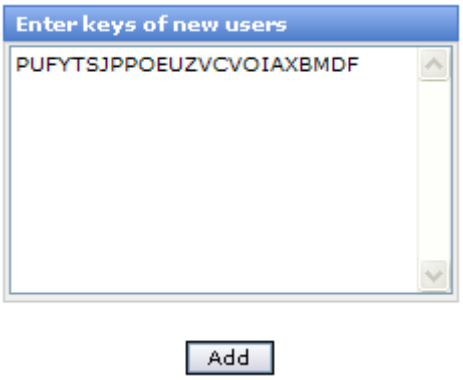


Figure 356 Pasting a User Key into the text field

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

5. Click the **Add** button.

   The user is added to the Object permissions list under Other users/Groups.

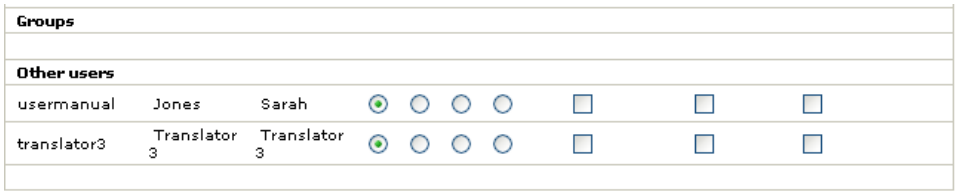


Figure 357 A user added under other users/groups

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

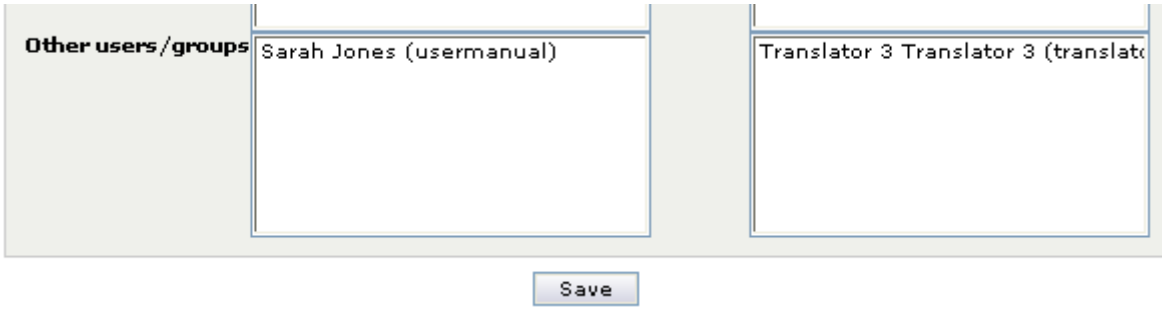


Figure 358 A new user displayed in Translation overview

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

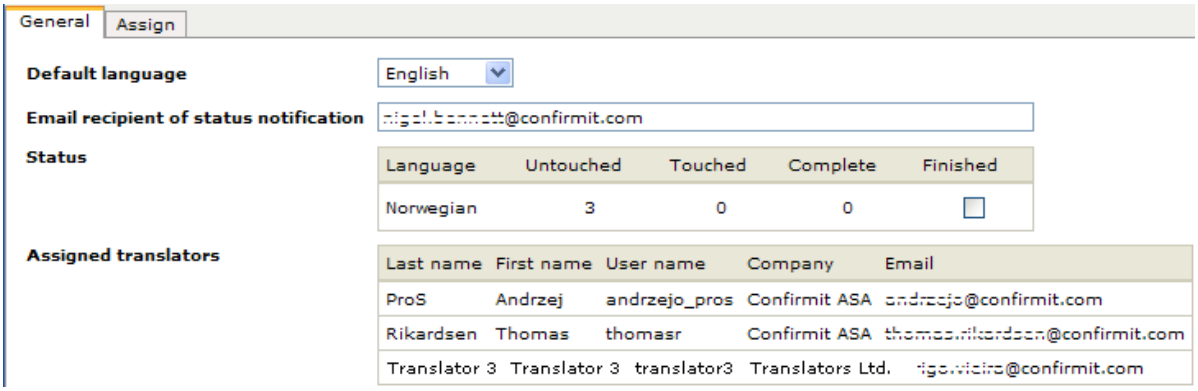


Figure 359 A new translator displayed in Assigned Translators

10.2.2. 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.

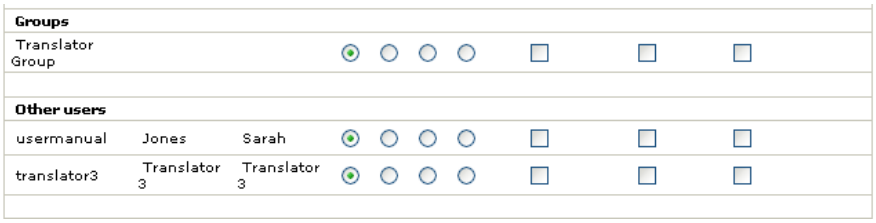


Figure 360 A Translator Group displayed in Object permissions

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.

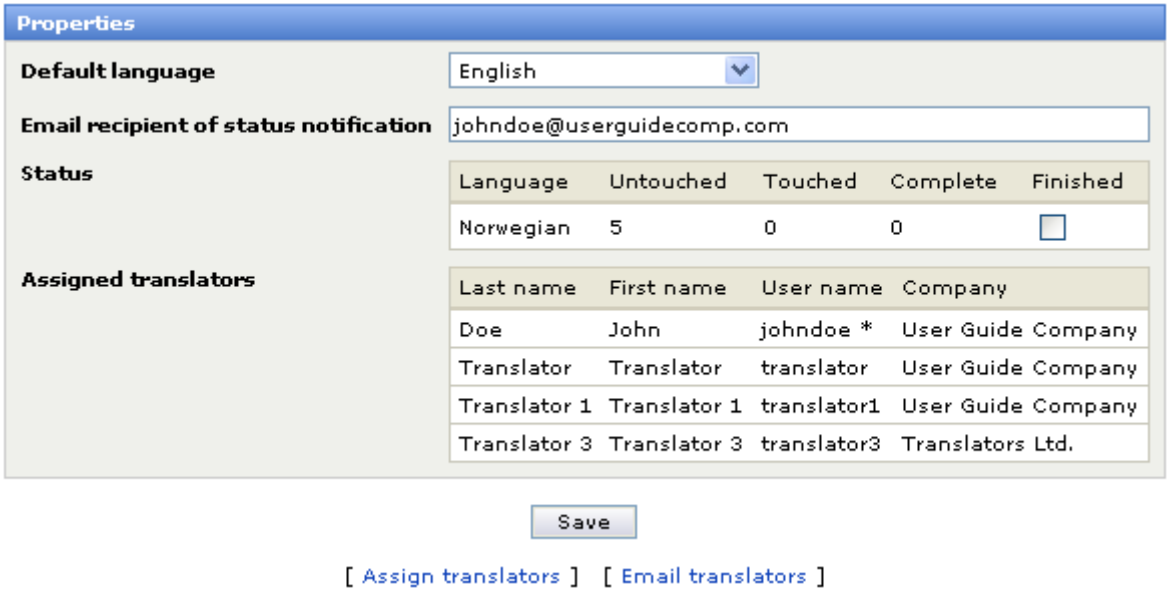


Figure 361 All translators in the group are displayed under Assigned translators

10.3. 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.

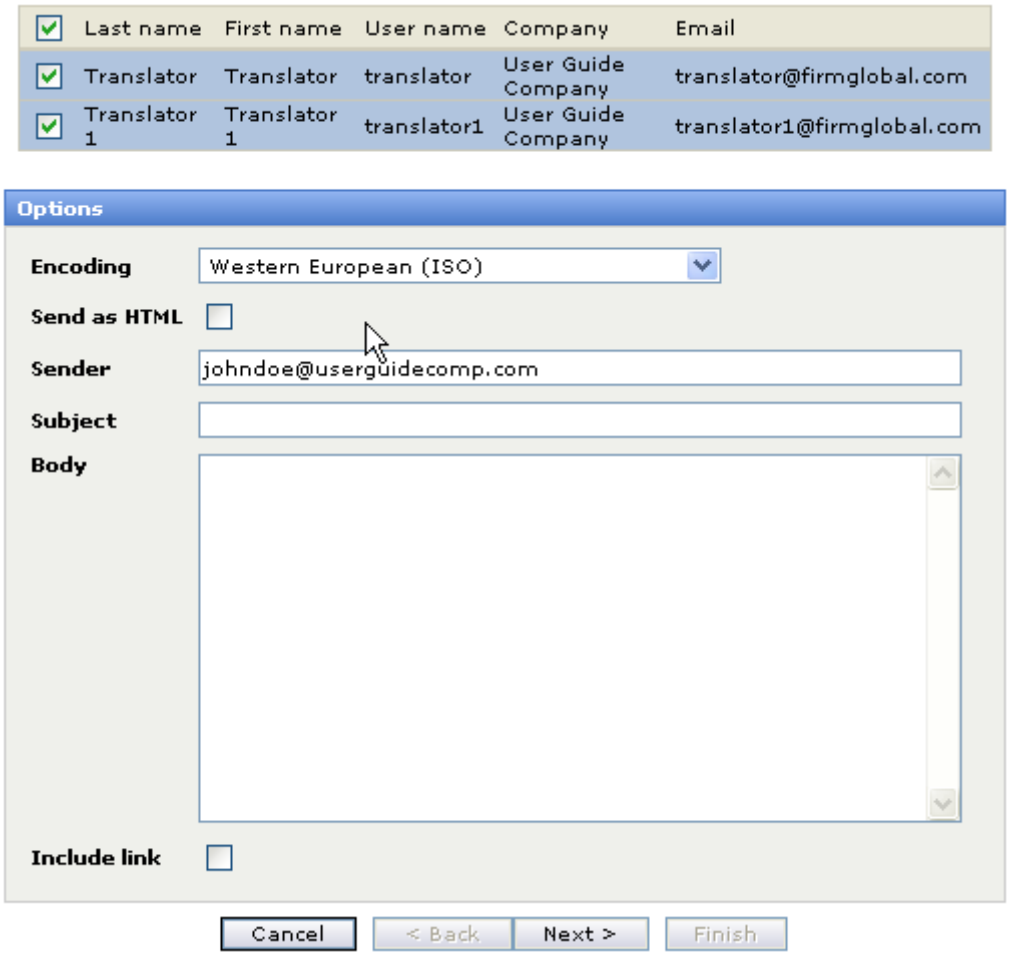


Figure 362 Selecting translators 1

2. Select the translators and define the other email properties.
   - **Encoding –** Choose the appropriate encoding when sending emails in Unicode languages.
   - **Send as HTML –** Emails may be sent as HTML codes. Check the "Send as HTML" box to send HTML coded email invitations. Comment: Not all mail systems will display such emails correctly. Use with caution. When used, "MIME" format should also be selected.
   - **Sender –** Enter the e-mail address that is to appear in the *From* header field in the e-mail. Bounce-backs and replies will be sent to this address. To show the name of the sender use this format: John Smith<email@address.com>
   - **Subject –** Enter the subject header of the e-mail.
   - **Body –** Enter the text that is to appear in the body of the e-mail message.
   - **Include link –** Select this checkbox to automatically have a link (URL) to the translator interface at the bottom of the e-mail (default).

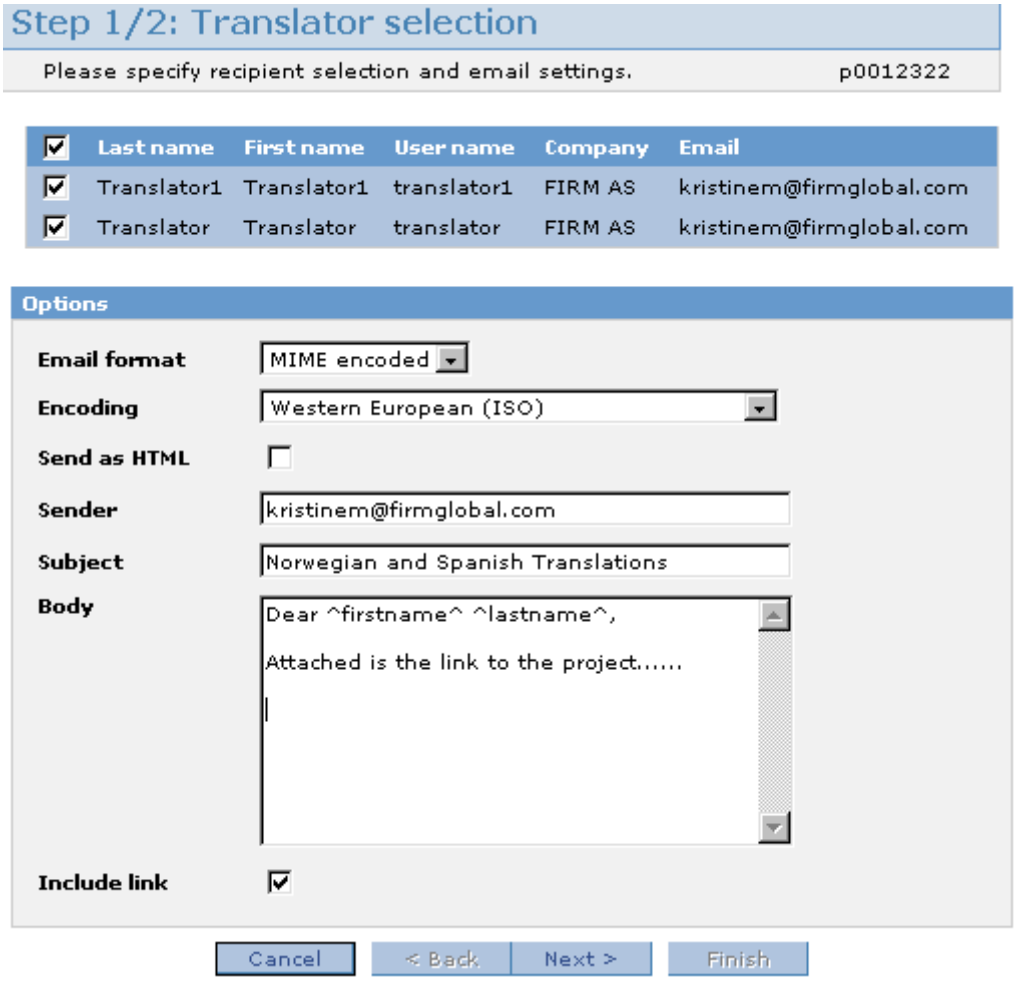


Figure 363 Selecting translators 2

In the email you can include information you have registered for the translator by using the following primitives:

```
^firstname^
^lastname^
^company^
^email^
^username^
```

Note: The password value cannot be piped into the email, and must be sent in a separate email.

3. Click **Next** to display the Preview and Send page.

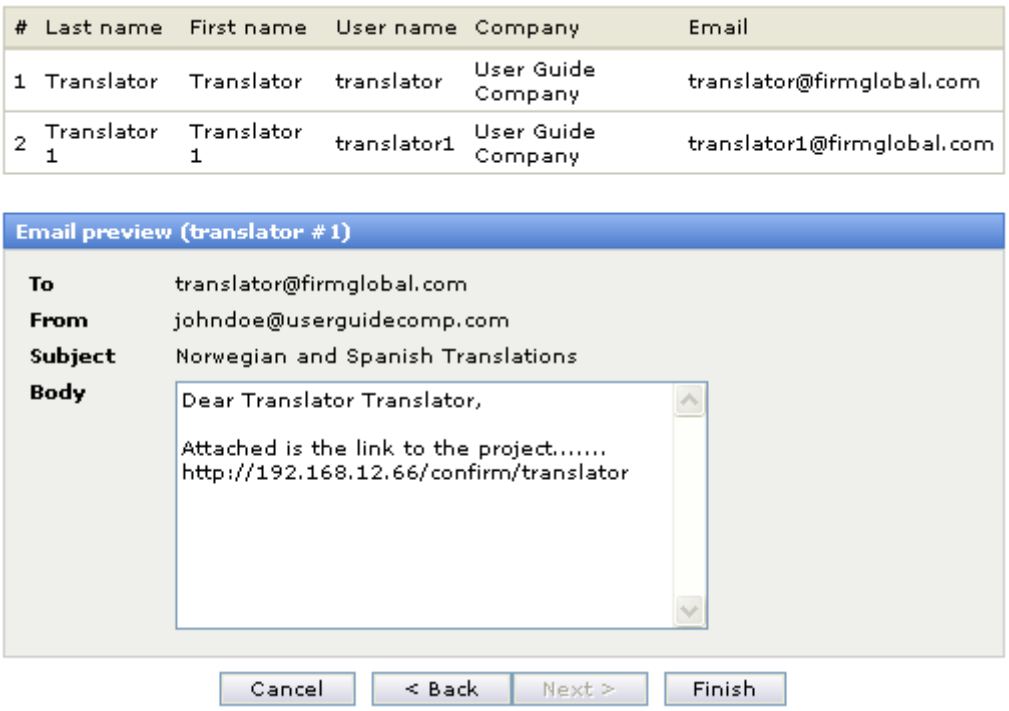


Figure 364 Preview and send

4. Click **Finish** to send the emails, click **Back** if you need to change to the email.

   On completion, a confirmation message is displayed.

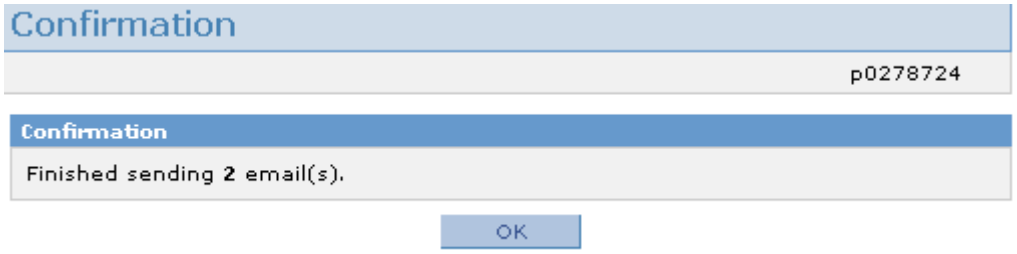


Figure 365 Example of the confirmation message

10.4. Translators' Interface

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

On-Demand only:
USA Server: http://author.confirmit.com/confirm/translator/
UK 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.

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



Figure 366 The translators' login page

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

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

Note: The translator module functions only in Internet Explorer 5.0, 5.5, and 6.0.

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.

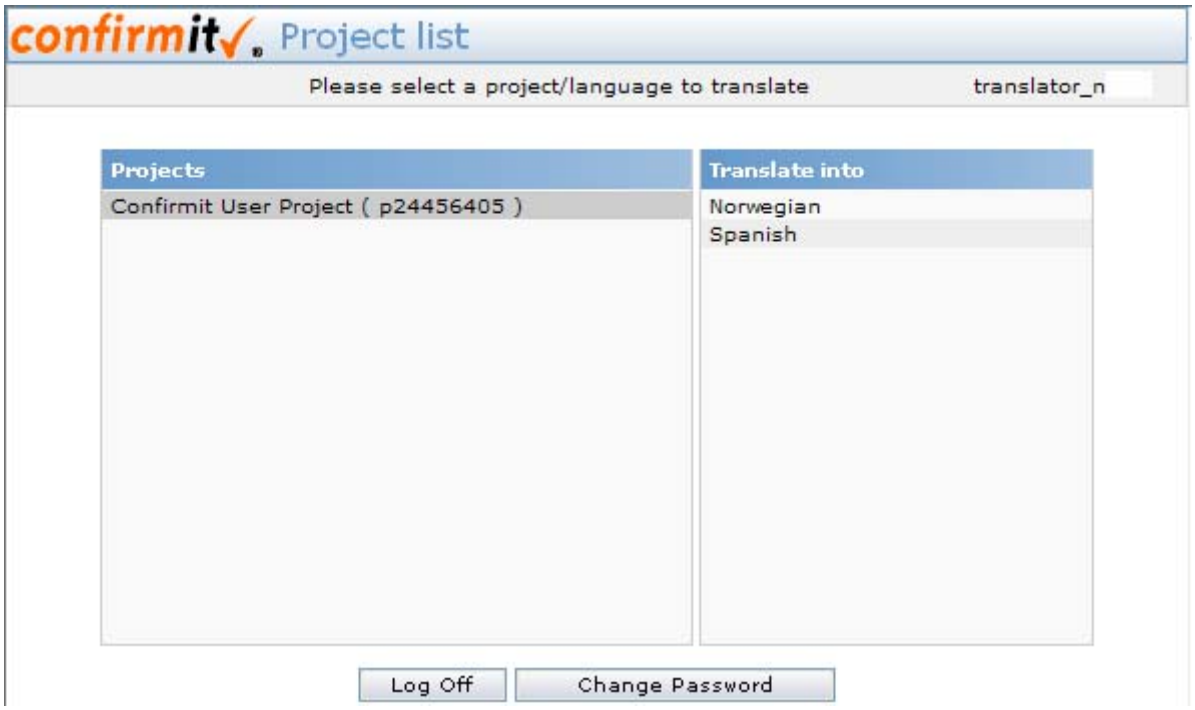


Figure 367 Example of a translators' project list

10.4.1. 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 inn the editor toolbar are standard Windows-style tools.

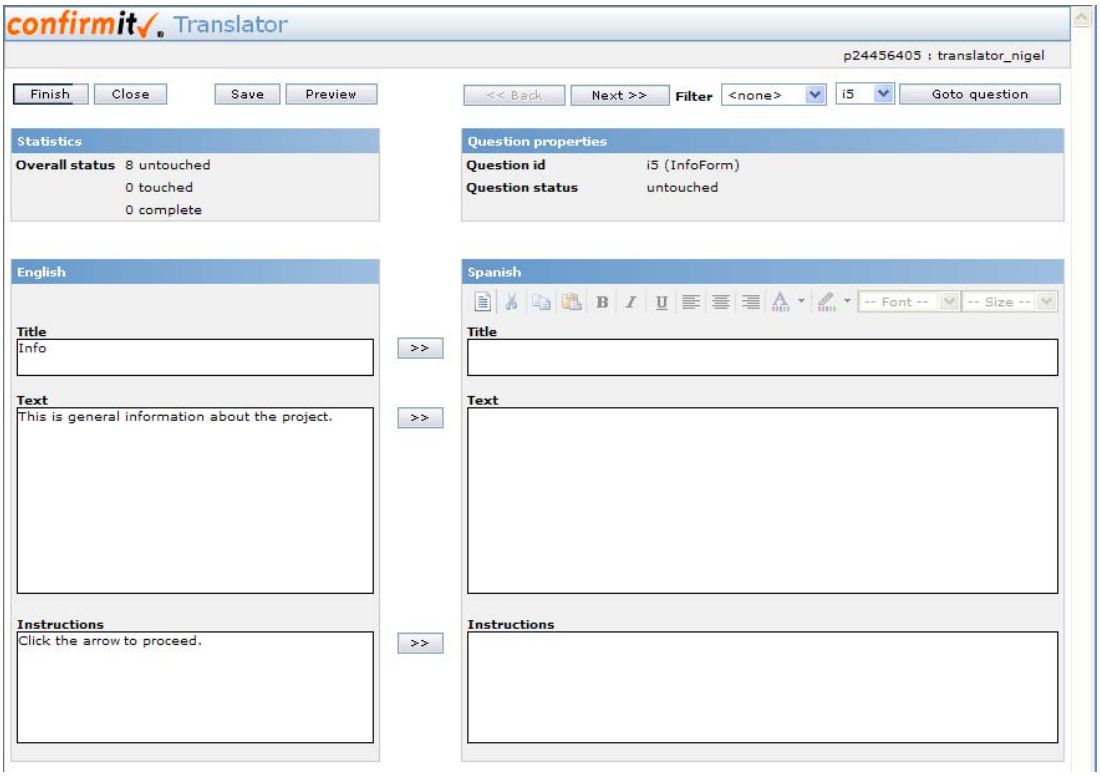


Figure 368 Example of the Translator page

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.
  - **Untouched** if no translation has been entered in the target language.
  - **Touched** if some fields have been translated.
  - **Complete** if all fields from source language have been translated into the target language.

The predefined Scales/Lists are displayed first in the Translator. When the translator has finished translating the last question in the routing, the message *End of routing* is displayed.

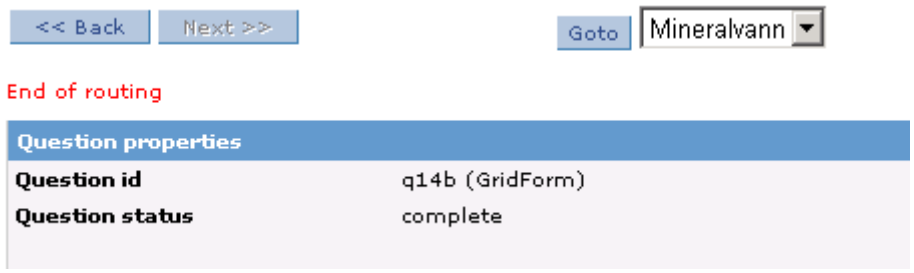


Figure 369 End of routing message in Translator

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.

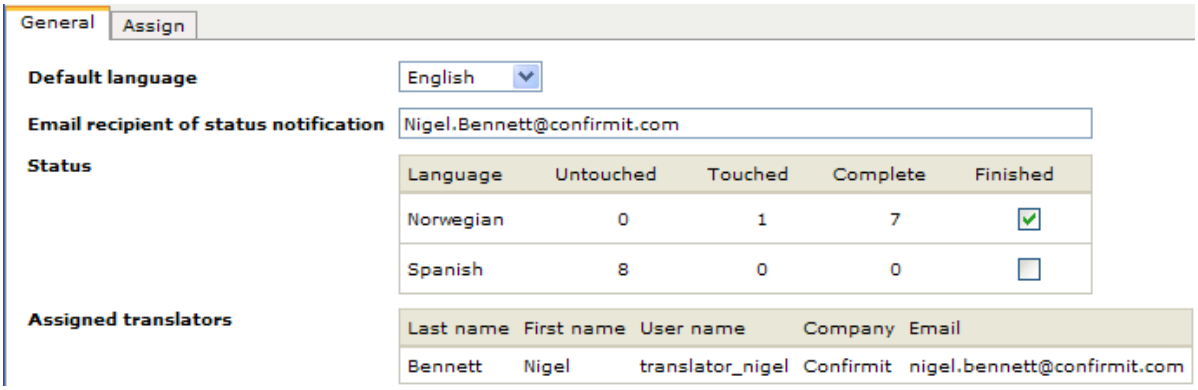


Figure 370 The translation is finished

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

11. 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 that email invitations created in Confirmit Designer can be translated using the Translation module.

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**.

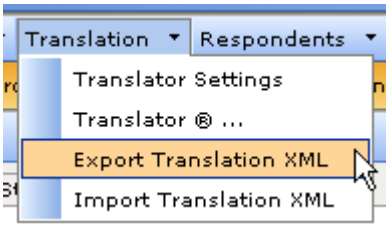


Figure 371 Selecting Export Translation XML

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.

You are now asked to define the target language.

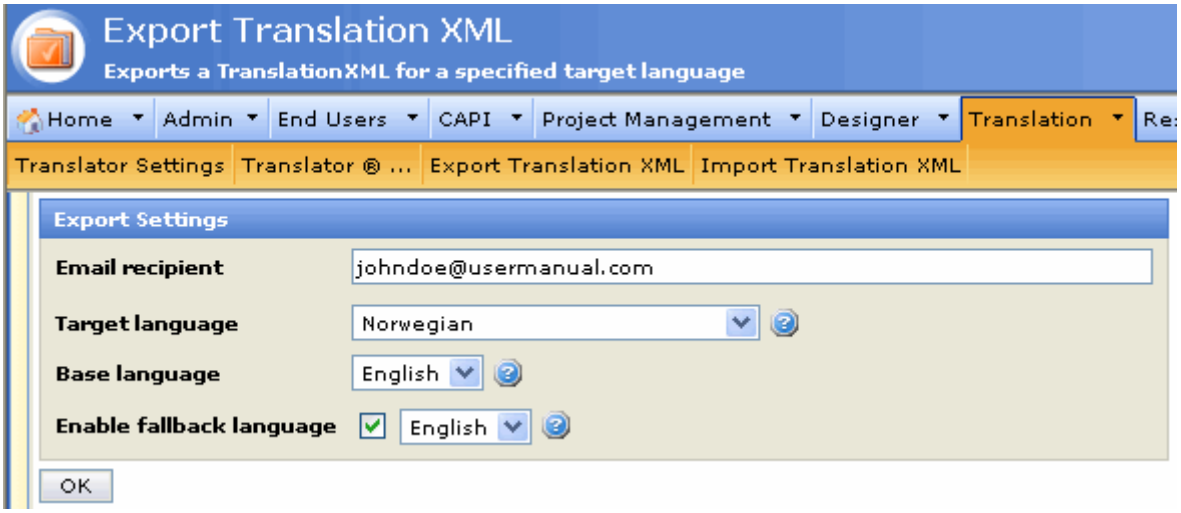


Figure 372 Example of the Export Settings

2. 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.

3. 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).

4. On completion, click **OK**.

The following are some general guidelines to help you avoid errors and to ensure the best result when using the Translation XML functionality:

- Before translating a survey, always complete it in one language first.
  - Changing the survey while it is being translated may disturb the translation process. You may then have to translate the entire survey, or parts of it, again. It will also be very difficult to keep track of which parts of the survey have been translated and which have not. For example: if while someone is translating your survey from English to German you change the answers to a question, once the completed translation is uploaded, the answers will mean something entirely different in German than in English because the German translation is based on an earlier version of the English version.
  - If you need to change the survey while in translation mode, you are recommended to make a new Translation XML export after all the changes have been completed.
- If possible, avoid duplicating a survey that will later be translated, and avoid basing your new survey on a duplicate of another survey.
  - Once a survey is duplicated, it will share survey elements with the duplicate. This means that the Object IDs of the various parts of the original version of the survey will be the same as those of the duplicate (these are the same as the Object IDs used in the TranslationXML). However, once an object in either the original or the duplicate changes, it will be assigned a new Object ID as it can no longer share this object with the original/duplicate. If you were translating a survey in TranslationXML at this point, the Object ID of that object would now be invalid. This is not a major concern as the primary identifier for a survey element is its name. However there are a few survey elements (answers, scales, predefined list elements) that do not have their own names, and if these elements' Object IDs have changed, they will try to use the precode attribute as the identifier. So, if you need to duplicate the survey, make sure all answers and scales use precodes.
  - 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 precodes 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 pXXXXXXXX_20.xml, where 20 is the code for Norwegian.

When translating, the translator simply writes over the base language texts. The example below shows the translator overwriting the original Norwegian text with the English translation.

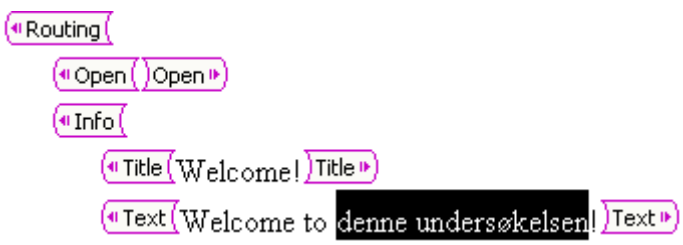


Figure 373 Translating in XML Word

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.

12. 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 (precode 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 (go to The Code Completion Functionality on page 288 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 precode masks section). They are however not restricted to being used in only that context. Refer to the Confirmit Scripting manual for further details.

12.1. 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.

12.1.1. f('qID')

Its basic syntax is `f("qID")`, where qID is the question ID specified in Properties (go to Question Properties on page 160 for more information). The values returned are different for different question types, as described below, but they are always strings or sets of strings.

Question type	Values returned
Single	The precode of the answer.
Open	A string with the text answered.
Multi	A set with the precodes of the answers selected.
Multi with Ordered, OpenText or Numeric checked (go to Question Properties on page 160 for more information)	A set with the precodes of the elements in the answer list that are answered.
Grid	A set with the precodes of the elements in the answer list that are answered.
"Other" from answer lists	A string with the text answered.

12.1.1.1. Single

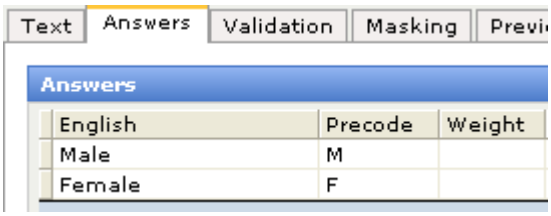


Figure 374 Example of an answer list for a single question "gender"

If the respondent answers **Male**, then the code `f("gender")` will return the value **M**.

12.1.1.2. Open Text

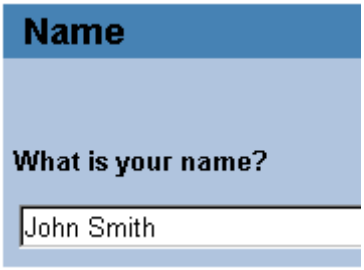


Figure 375 Open Text question "name"

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

12.1.1.3. Multi

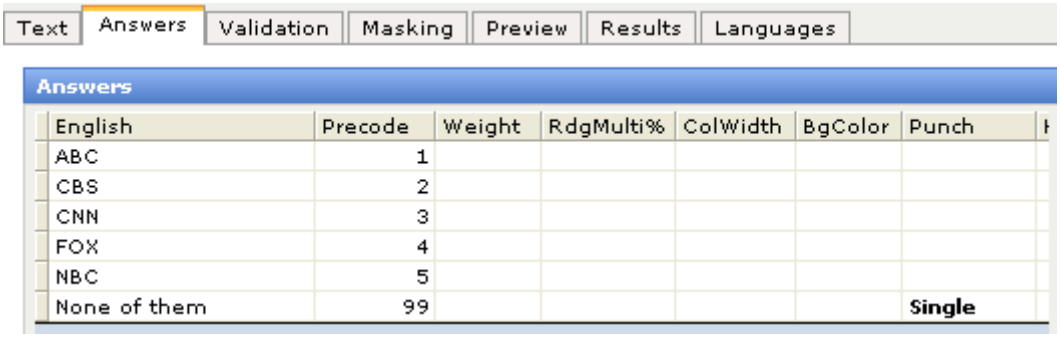


Figure 376 Example of an answer list for a multi question "TVchannels"

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 precodes) will also be used in the following examples.

12.1.1.4. Multi with OpenText or Ordered Property Checked

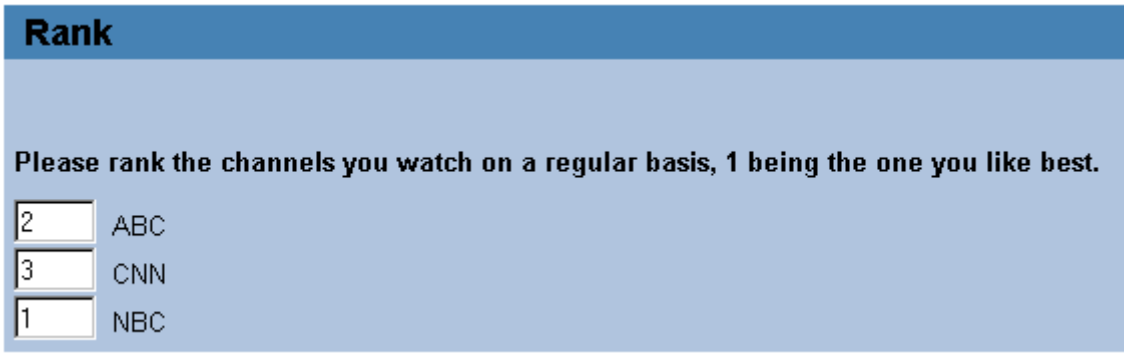


Figure 377 Example of a multi question "rank"

For an ordered multi 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 precodes of the items answered in the list, *1,3,5.*

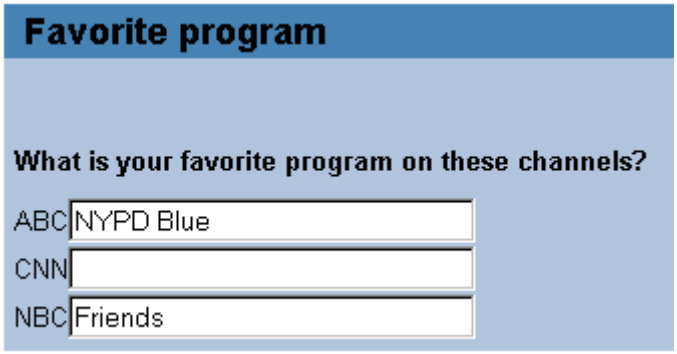


Figure 378 Example of a multi question "program"

A multi question with the **OpenText** property checked 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 precodes 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*(go to Precode and Scale Masks /Filtering Answer Lists/Scales on page 277 for more information)

12.1.1.5. Grid

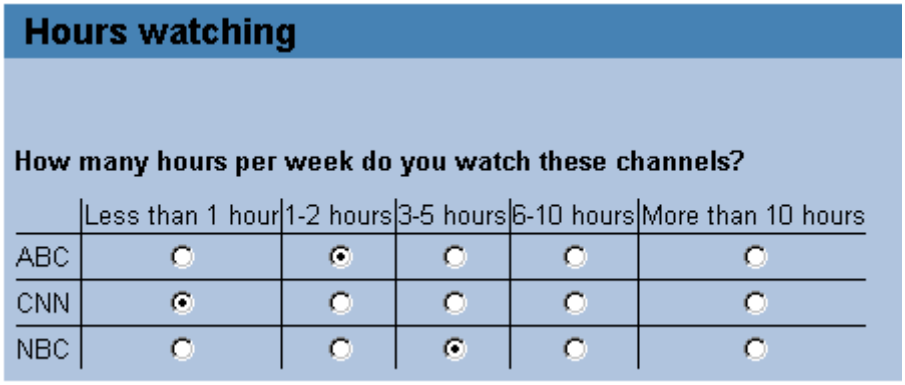


Figure 379 Example of the grid "hours"

Here the code `f("hours")` will return a set of precodes from the answer list that has an answer, here it would be 1,3,5.

12.1.1.6. Other, Specify

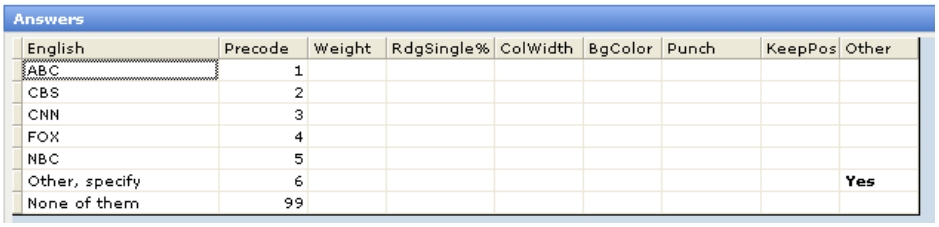


Figure 380 Example of the answer list for the single question "favorite"

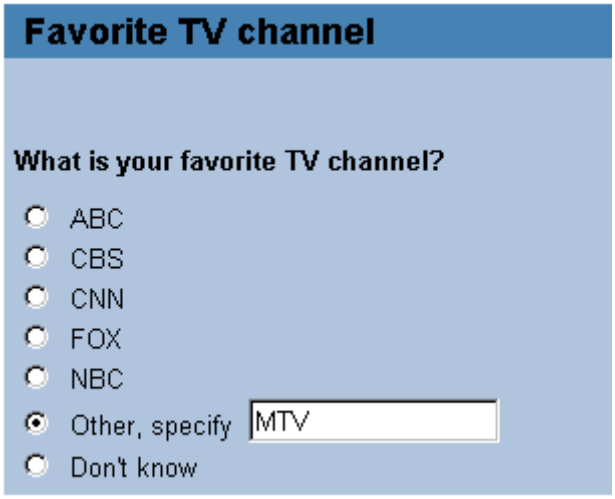


Figure 381 How the respondent will see the single question "favorite"

An Other text box will have the "question id"+_+"precode"+_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.

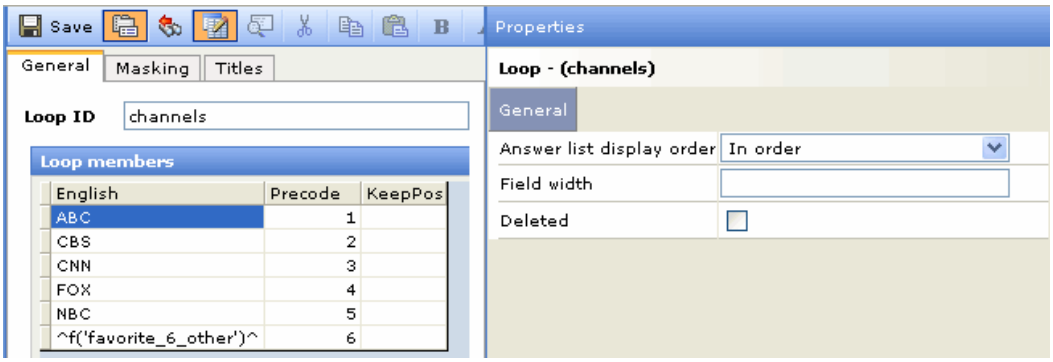


Figure 382 Other, specify in loops

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

12.1.2. f('qID')['precode']

Multi and Grid questions group one or more variables in the same form. The answers are stored in consecutive columns in the database (go to Question Properties on page 160 for more information). To extract the answer from one item of a Multi or Grid question, use as the identifier the precode of the item you wish to extract: **f("qID")["precode"]**. The values returned from f("qID")["precode"] for different question types are shown below:

Question type	Values returned
Multi	1 if the item with this precode is checked off, 0 if it is not.
Multi with Ordered checked	A string with the value (rank) given to the item with this precode.
Multi with OpenText checked	A string with the text answered for the item with this precode
Grid	The precode (from scale) of the answer to the item with this precode.

12.1.2.1. 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).

12.1.2.2. Multi with Ordered Property Checked

Using the same example as in the MultiwithOpenTextorOrdered section, the multi 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).

12.1.2.3. Multi with OpenText Property Checked

Using the multi question *program* from the MultiwithOpenTextorOrdered 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*.

12.1.2.4. Grids

Using the answers from the grid shown in the Grid section, **`f("hours")["1"]`** will return 2. **`f("hours")["3"]`** will return 1 and `f("hours")["5"]` will return 3 provided that the scale of the grid is defined.

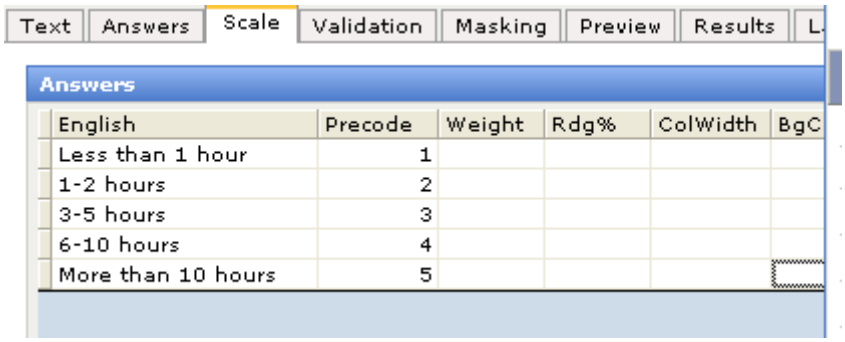


Figure 383 Scale of grid "hours"

12.1.3. Loops - f('qID','iteration_precode','iteration_precode',.....)

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.

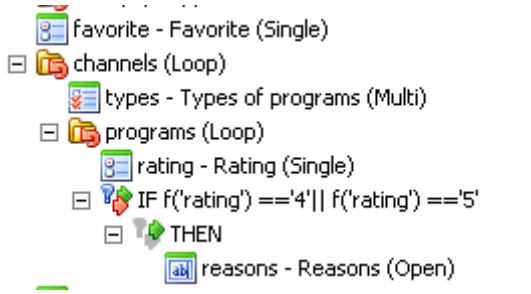


Figure 384 Nested loops

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 "precode" of that iteration must be specified. **`f("rating","1")`** will give the value of *rating* of "Sit-coms" (see the figure below) as this is the first iteration.



Figure 385 The inner loop, "programs"

This expression may be used within both loops. For the outer loop, the current value for "channels" will be used. However you may also specify the iteration of the outer loop (outside the loops, you must!).

`f("rating","1","5")` will give the rating of NBC's "Sit-coms" (see the figure below). Note the order - the innermost loop first. An expression such as **f("rating")** outside the loops would not make much sense.

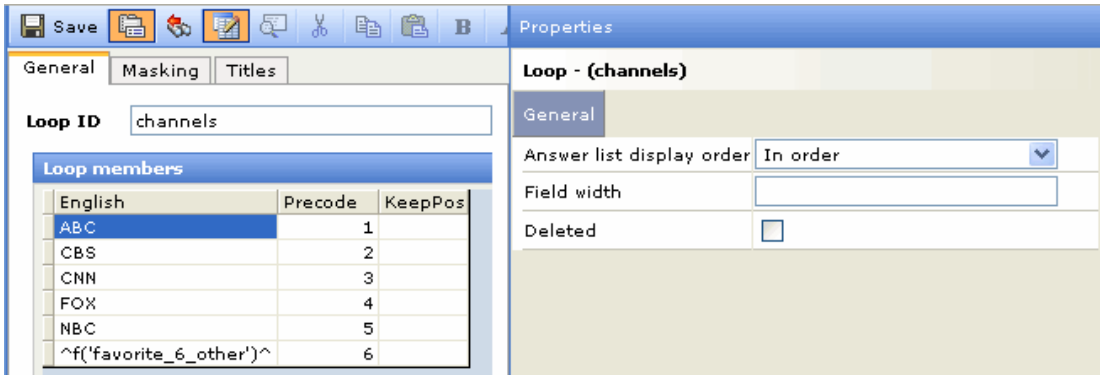


Figure 386 The outer loop, "channels"

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 precode of the current iteration (go to Text Substitution/Response Piping on page 282 for more information).

12.2. 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	>=
Equality	==
Inequality	!=
Logical AND	&&
Logical OR	||

12.2.1. .inc()

As described in the f("qID") section, f("qID") of **multi** question returns a set of the precodes answered to question qID. If you want to test for a particular value, use .inc (includes). `f("qID").inc("precode")` will return TRUE if "precode" is one of the answers to qID.

12.2.2. .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.

12.2.3. .toNumber()

The .toNumber() method converts the variable to a number.

Example:

The "precodes", 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 precodes 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.

12.3. Precode and Scale Masks /Filtering Answer Lists/Scales

Precode masks are used to filter answer lists of 3D-grids, grids, single and multi questions and to select a set of iterations for a loop. In the precode mask field in a question's Properties page (go to Question Properties on page 160 for more information) or in the loop construct (go to Loops on page 174 for more information) you may use a Jscript expression that evaluates to a set of precodes. The answer list (or loop member list) will be filtered based on the set of precodes in the Precode mask field.

Scale masks are used to filter scale lists of grid questions. Use the scale mask field in a grid question's Properties page (go to Question Properties on page 160 for more information) to enter a Jscript expression that evaluates to a set of precodes. The scale list will then be filtered based on this set of precodes.

We have already seen how the f function evaluates to a set of precodes when used on multi questions.

In the question "Tvchannels" from the Multi section, the respondent answered ABC, CNN and NBC (precodes 1, 3 and 5.). In the next questions only these should appear. So in the precode mask field of questions "rank" and "hours" from the MultiwithOpenTextorOrdered section and the Grid section, the following expression was used: `f("Tvchannels")`. This expression gave a set with the precodes 1, 3 and 5 and consequently only the items in the answer list matching those precodes were displayed.

The following sections describe other functions that are useful when constructing sets of precodes.

12.3.1. a('qID')

`a("qID")` returns the complete set of precodes defined in the answer list belonging to qID, irrespective of whether or not they are answered.

12.3.2. set(), nset(), nnset()

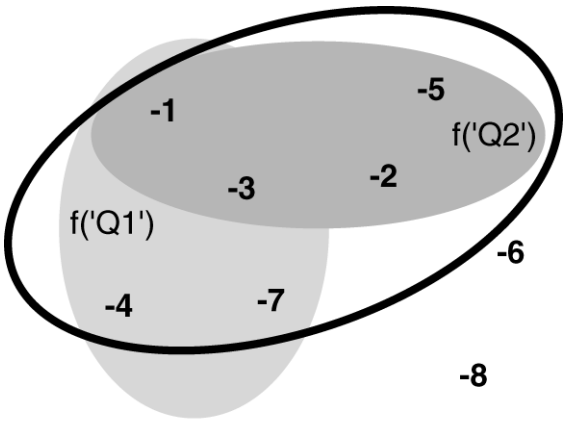
You may need to create sets yourself. The three functions described below should simplify this process.

- `set("precode","precode",…)` returns a set consisting of the precodes you specify. `set("1","2","3")` gives the set consisting of the precodes 1, 2 and 3.
- `nset(n)` returns a set populated with the members 1, 2, 3,…,n. `nset(3)` gives the same as the previous example, a set consisiting of the precodes 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 precodes 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 Precode mask property of that question.

12.3.3. .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 precodes answered to either Q1 or Q2. If you want to add specific precodes to a set in a precode mask, then use .union() in combination with set().

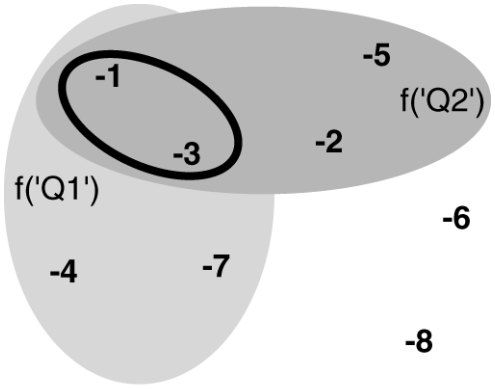


f('Q1').union(f('Q2'))

Example: f('qID').union(set('99'))Here you will always include the answer alternative with precode '99'

12.3.4. .isect()

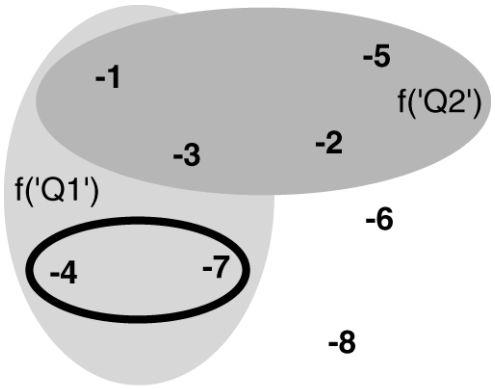
`f('Q1').isect(f('Q2'))` returns a new set that is the intersection of f('Q1') and f('Q2'), that is a set consisting of all precodes answered both in Q1 and Q2.



f('Q1').isect(f('Q2'))

12.3.5. .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 precodes answered in Q1 and not in Q2. If you want to remove specific precodes from a set in a precode mask, then use .diff() together with set()



f('Q1').diff(f('Q2'))

Example: f('qID').diff(set('1')) Here '1' is never included.

12.3.6. Precodes

Remember that the precode mask gives a set of precodes that are used to filter the answer list/iterations. Make sure that you use exactly the same precodes on the items of the answer lists in the different answer lists, or else the masks will be wrong. Tip: Use Predefined scales/lists (go to How to Add New Objects to the Questionnaire Tree on page 147 for more information) as much as possible when using precode masks, because then you are sure that the precodes are exactly the same in the different questions.

12.4. 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 multi with open text numeric property for each of the TV channels, there will be one column for each channel.

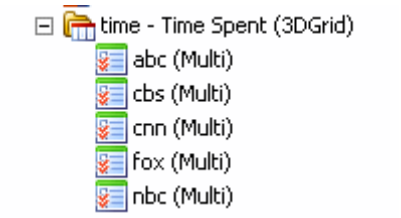


Figure 387 The "time" 3d-grid from the questionnaire tree

We can filter these columns based on the answers to the "TVchannel" question by including conditions such as `f("TVchannel").inc("1")` in the "column mask" for each of them.

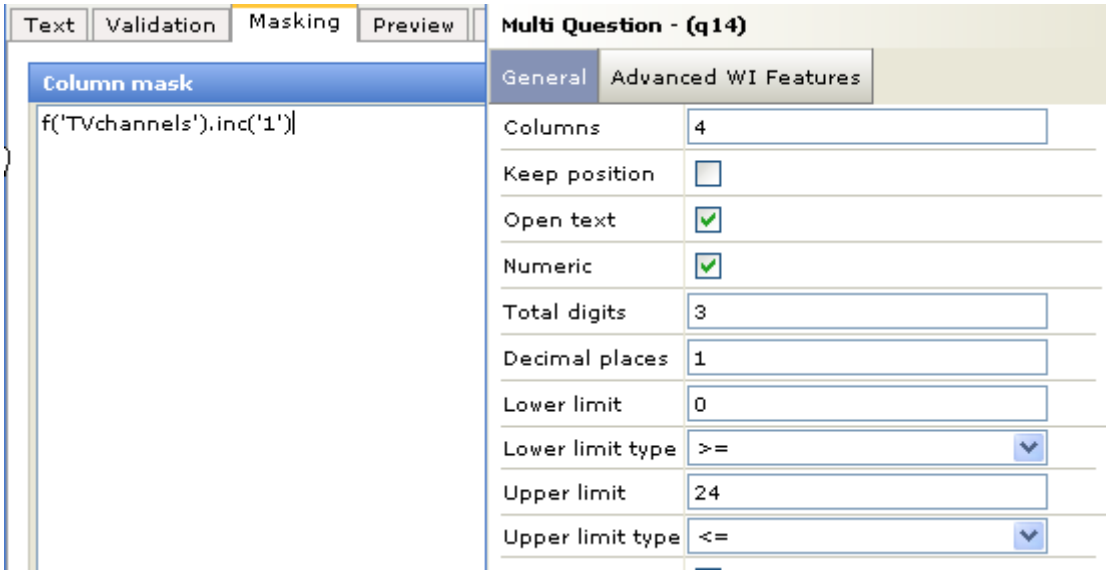


Figure 388 Properties of the "abc" multi question in the 3D-grid

The result will then be that only the channels answered in the "TVchannel" question will be displayed:

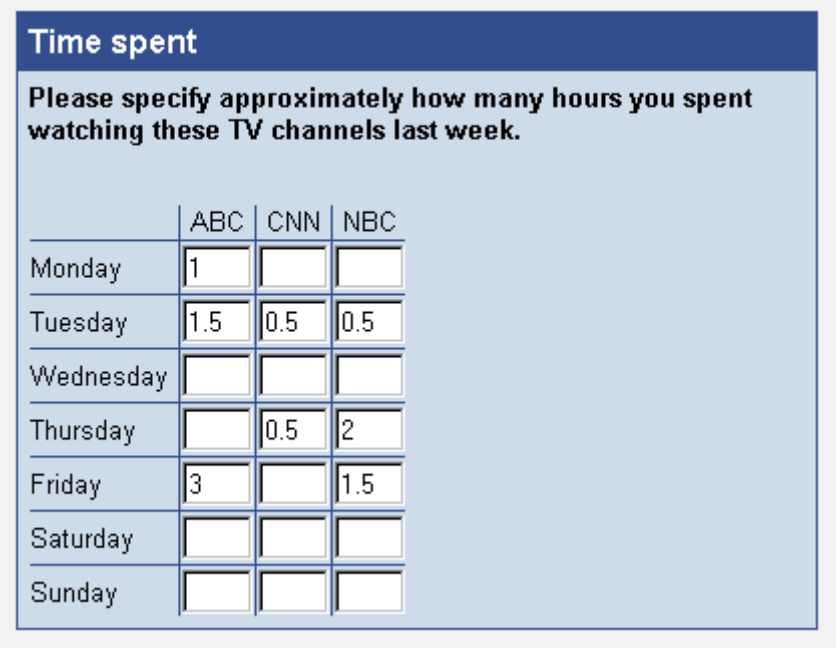


Figure 389 The resulting "Time spent" question

12.5. Question Mask

Used to dynamically exclude and include questions in questionnaires. This functionality can also be used in Page objects (go to Page on page 185 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 (precode '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')

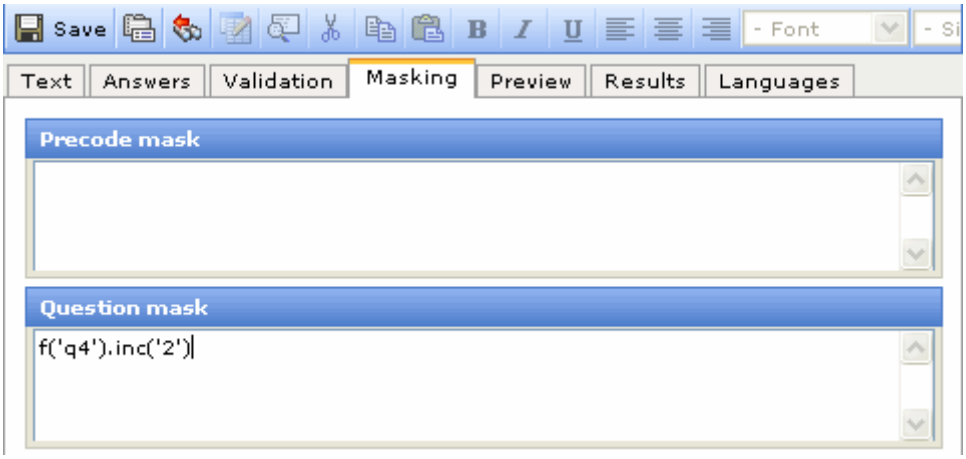


Figure 390 Example of Question masking

12.6. 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, precode 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

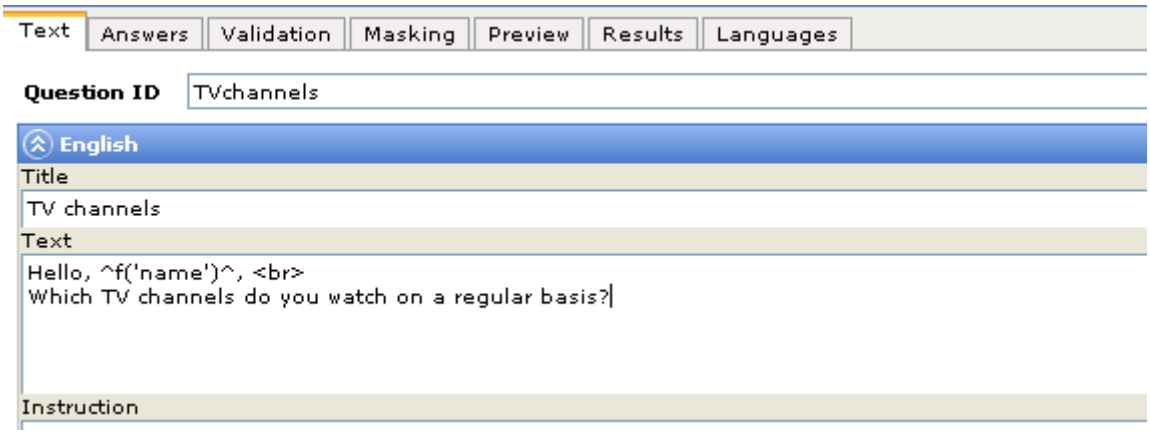


Figure 391 The TVchannels question

The respondent will see the question as shown in the figure below (the name will be different of course).

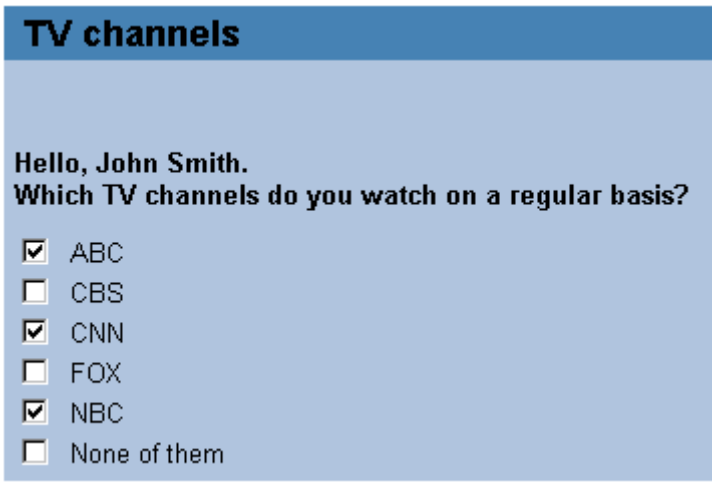


Figure 392 The "TVchannels" question with text substitution

The two tables below show texts returned from **^f("qID")^** and **^f("qID")["precode"]^** for different question types:

Question type	Returned from ^f("qID")^
Open text	The text answered in the text box.
Single	The text from the answer list corresponding to the precode returned from f("qID") in the current

	language.
Multi	The text(s) from the answer list corresponding to the precode(s) returned from f("qID") in the current language. If more than one, the answer will be separated by comma and with "and" (in the current language) between the last two items.
Other property of answer lists	The text answered in the text box. (The question ID is qID_precode_other (go to Question Properties on page 160 for more information))
Loop	The text of the loop member corresponding to the iteration with precode qID in the current language.

Question type	**Returned from ^f("qID")["precode"]^**
Multi with OpenText or Ordered property	The text answered in the text box.
Grid	The answer from the scale corresponding to the precode returned from f("qID")["precode"] in the current language.

The same rules will apply to loop questions, but there you may need to specify iteration(s) as well (go to Loops - f('qID','iteration_precode','iteration_precode',…..) on page 275 for more information).

12.7. 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 and IE7 (Windows), Firefox 1.5+, Opera 9+ and Safari 2+. This functionality is only available in surveys using Survey Layouts (go to Survey Layouts on page 40 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.

12.7.1. 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.

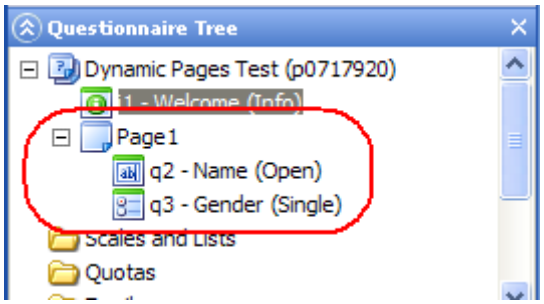


Figure 393 The page containing the two questions

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.

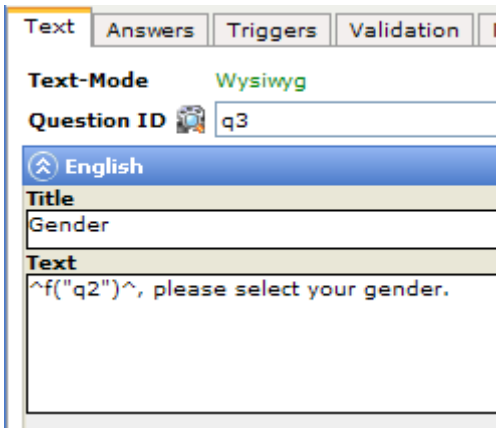


Figure 394 Piping the answer text from q2 into q3

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**.

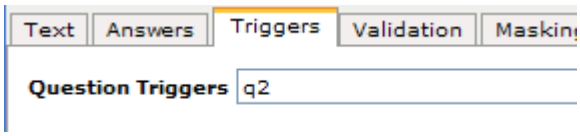


Figure 395 Setting the Trigger

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.

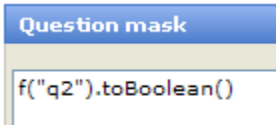


Figure 396 The masking expression

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.

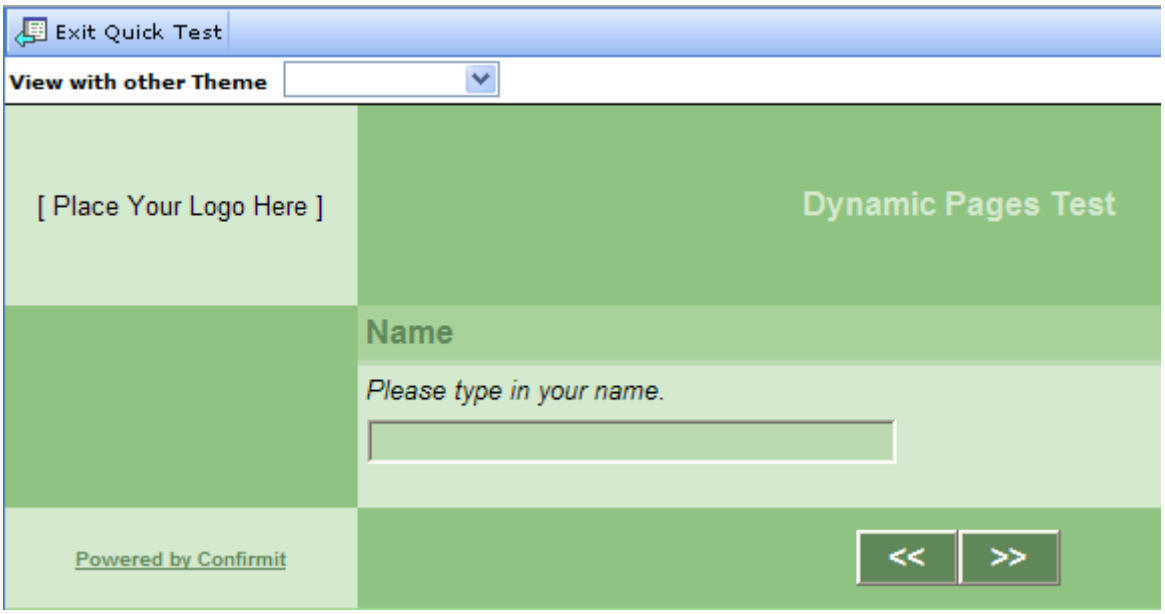


Figure 397 The page before the Name question is answered

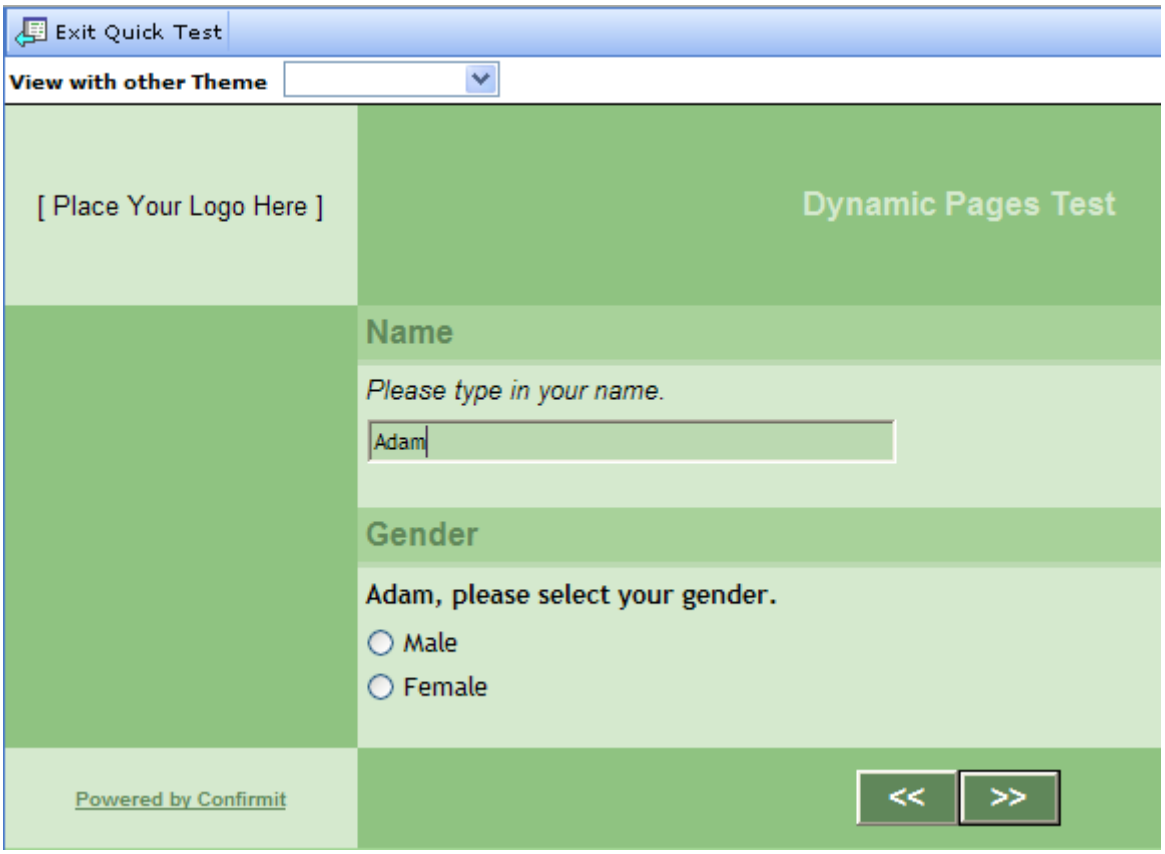


Figure 398 The page after the Name question is answered

When q2 is changed the part of the page that contains q3 will be refreshed, so any changes will be updated immediately.

12.8. 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 precodes 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.

12.8.1. 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 (go to Preparing for Data Collection on page 302 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:

12.8.1.1. 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 plain multi forms, an answer where no alternatives are checked are 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 (go to Question Properties on page 160 for more information).

12.8.1.2. 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.

12.8.1.3. 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.

12.8.1.4. Rank order testing

The system applies rank order testing when the "Ordered" option is selected for a form. **Multi** and **grid** answers must then constitute a set of consecutive integers starting at 1.

12.8.2. 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.

12.9. Script Nodes

Script nodes typically contain code for the following purposes.

- Internal programming purposes
- Defining functions used in precode 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.

12.9.1. Unicode Translator in Script Nodes

Double-click the script node to display the Unicode translator. This converts text from Unicode characters into either HTML code or JavaScript.

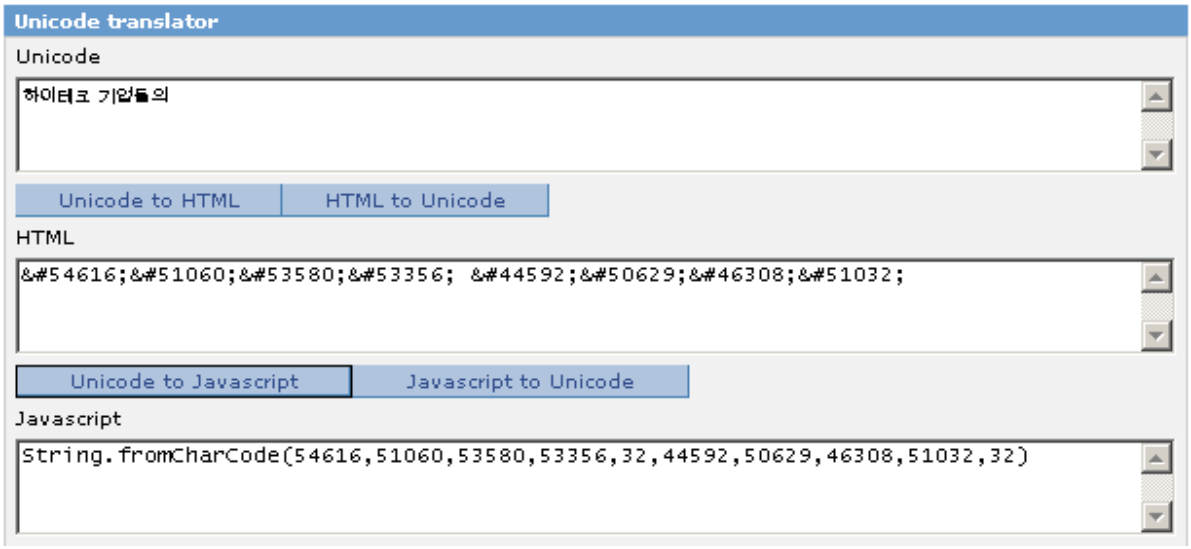


Figure 399 Example of the Unicode Translator

You may use the Unicode translator for example in Validation codes for customized error messages or when including SendMail scripts in questionnaires that are fielded also in Unicode languages.

For SendMail scripts you would translate the email body into JavaScript and paste it the generated code into the script. For more information see the Confirmit Scripting Manual.

Since validation codes are included in the WI Templates that are applied to surveys, the Unicode text should be translated into HTML, and pasted into the Validation code, for example:

```
if (f('q1').size() >
2){RaiseError();SetQuestionErrorMessage(LangIDs.ja,"&#26085;&#26412;&#
12392;&#12505;&#12523;&#12462;&#12540;&#12411;&#12393;&#36949;&#12356;
&#12398;&#22823;&#12365;&#12394;2&#12481;&#12540;&#12512;&#12434;&#352
11;&#12388;&#12369;！ ");}
```

12.10. 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:

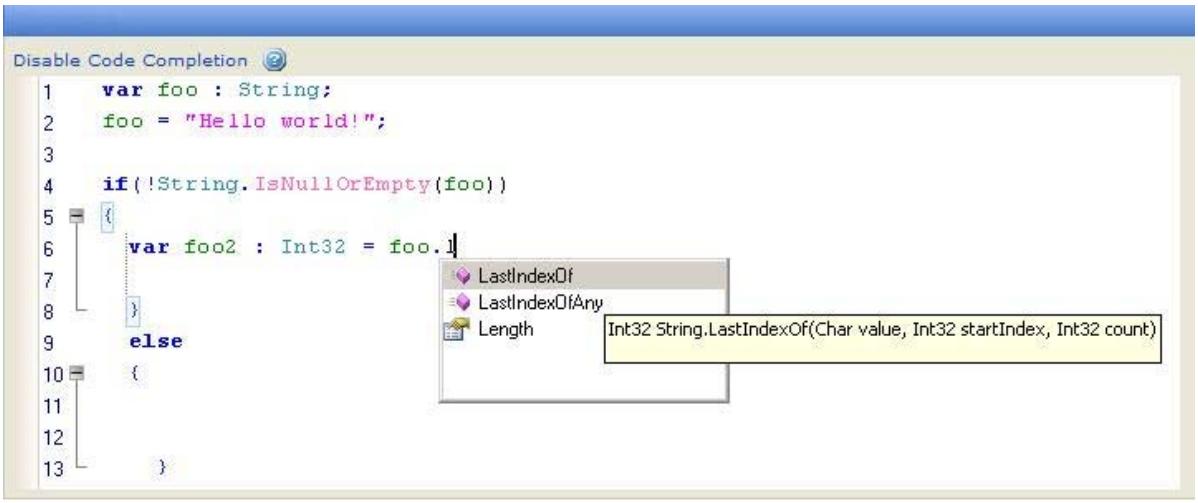


Figure 400 Example of Code Completion in action

12.10.1. 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.

12.10.2. Download and Install Code Completion

To download and install the add-on:

1. Start Confirmit and open a project.
2. Go to the **Professional 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 Enable Code Completion link is provided on all Confirmit pages in which scripting can be used, for example on a question's Masking tab as shown below.

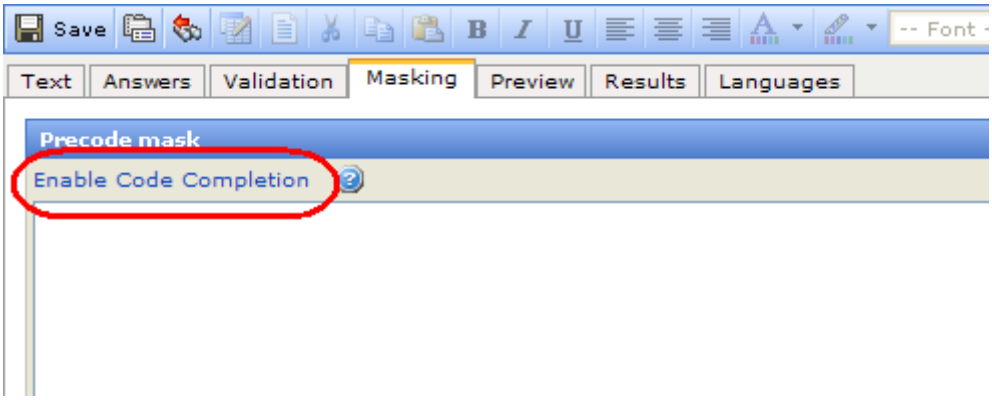


Figure 401 Example of the Enable Code Completion link

4. Click the **Enable Code Completion** link.

   A new window opens containing installation instructions and links to the appropriate download sites.

5. Follow the instructions.

12.10.3. 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**.

13. Quality Control

This chapter describes three methods of quality assurance that you have available in Confirmit in addition to manually testing the surveys.

13.1. Random Data Generator

Note: Random Data Generator is a chargeable Add-On.

The Random Data Generator (RDG) gives you the ability to set up an automated execution of a number of test interviews by selecting random responses on questions. The RDG will also run all script code and follow any skip logic (conditions) and answerlist filtering (precode masks) that may be included in the questionnaire, so that you are able to simulate real interviews.

The RDG will give you the ability to:

- Find runtime errors in script code. You can get runtime errors 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. Syntac errors in the script will be found when you create the interview files (go to Generating Interview Files on page 309 for more information)or through the "Check Script Code" functionality (go to Check Script Code on page 296 for more information)
- Identify logical errors in the questionnaire – for example groups of respondents that 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 precode mask etc.
- Ensure validation code works as intended.
- Get a test data set that is similar to what you would get in a real survey, as opposed to "Generate Dummy Data" which adds 50 responses to all questions. When working on defining a report for a survey before data collection is begun, this can be helpful.

Note: The Random Data Generator 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.

13.1.1. Ordering the Generation of Random Data

Note: The Random Data Generator is only available for the test database, so if test is not active, you must change to Test in the global switch at the bottom of the page.

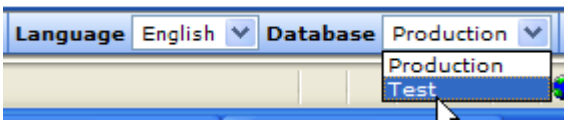


Figure 402 Select the Test database

1. Go to the **Designer > Quality Control > Random Data Generator** menu command.

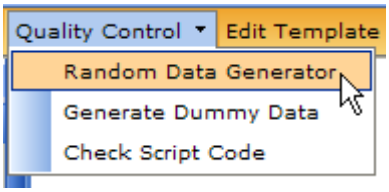


Figure 403 Starting the Random Data Generator

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 respondents random data can be generated for in one batch job, so the numbers available in the drop-down may differ from those shown in the figure below.

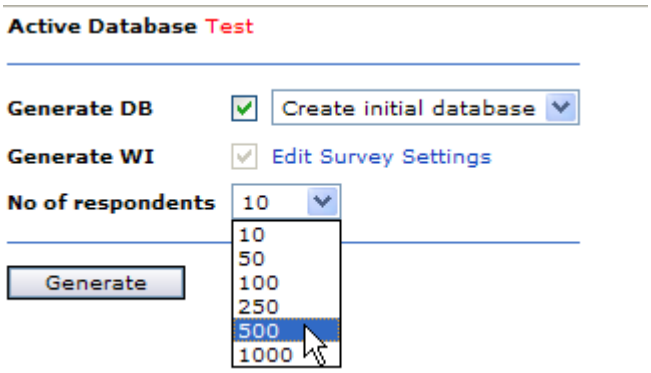


Figure 404 Selecting the desired number of responses

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.

3. Click **Generate**.

   The data is created and a task progress page opens.

13.1.2. 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.

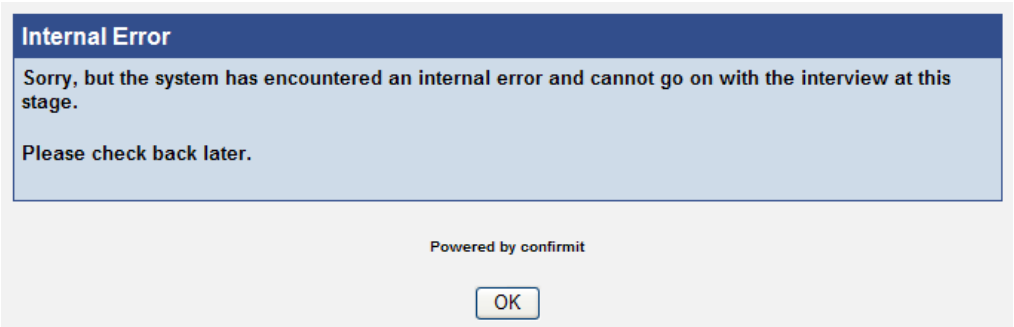


Figure 405 Example of an internal error

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.

The description of the error is clickable, and opens the question, condition or script node containing the error. The full error description will be displayed as a tooltip if you point on it. Below is an example of such an error:

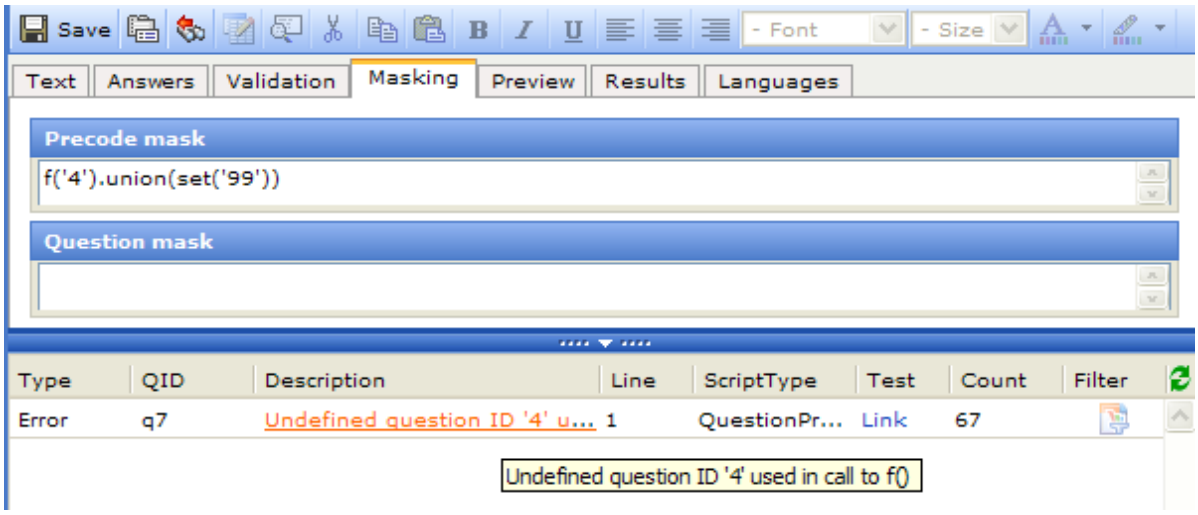


Figure 406 Example of a list of errors

In this example, a **q** is missing in the question id in the precode 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 (precode 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.

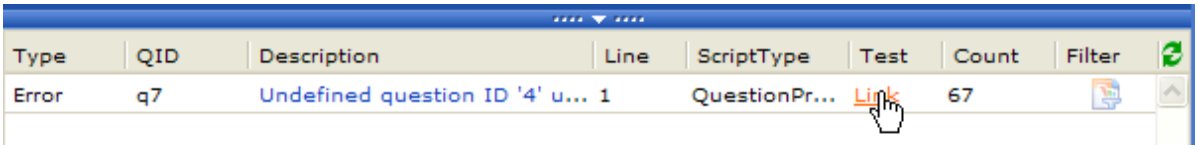


Figure 407 Example of the Link page

If you click on the filter icon towards the right end of the row, the results in Top Line Reporting or the Results tab on questions in designer will be filtered so that you only see the results of those who received the particular error.

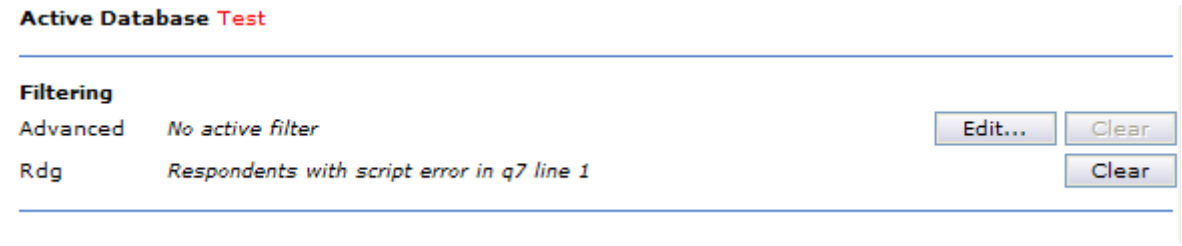


Figure 408 Example of the Filter page

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.

13.1.3. User-defined Validation

The Random Data will be created according to the properties you have set on your questions (for example following 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 (go to Rapid Results on page 386 for more information) or looking at the test results in Survey Data Editor (go to Edit Survey Data on page 522 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:

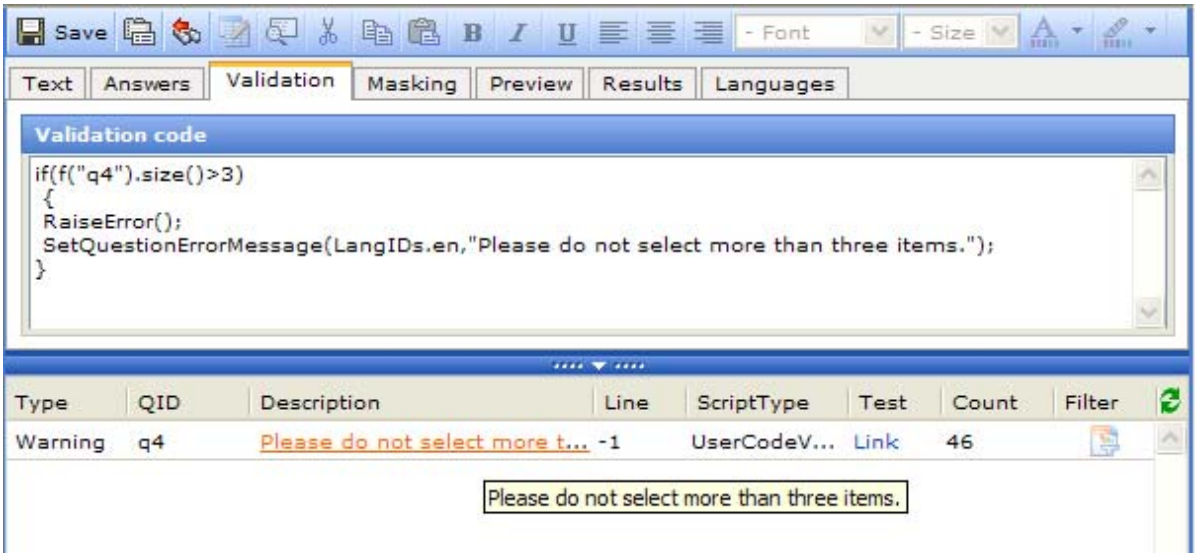


Figure 409 Warnings from User-Defined Validation

13.1.4. 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 410 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:

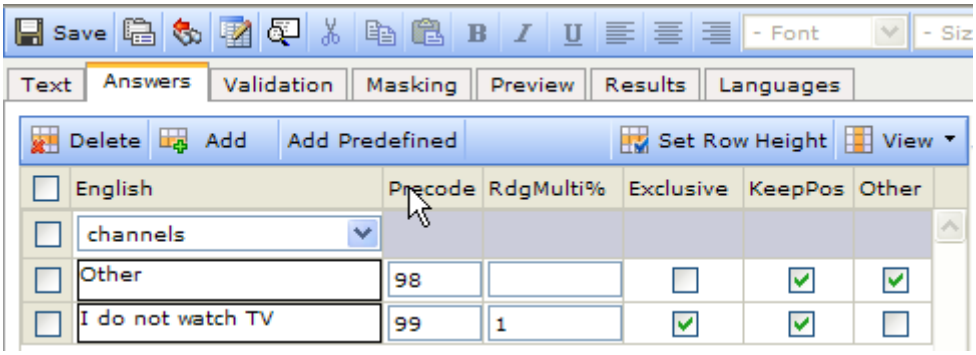


Figure 411 Setting the RDGMulti% to prevent excessive screening

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.

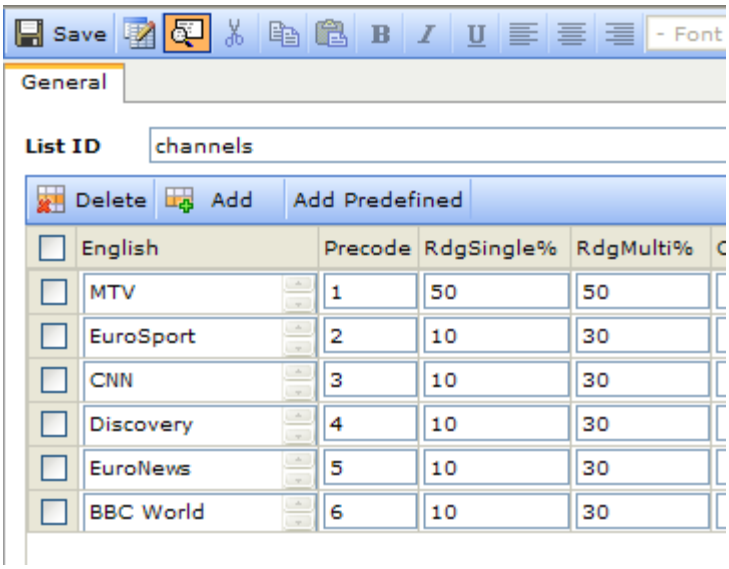


Figure 412 RdgSingle% and RdgMulti% in a predefined answer list

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.

13.1.5. 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.

13.2. Generate Dummy Data

Note: This functionality is not available in the Optimized database format.

You can generate dummy data in Test mode, for example to test the reporting setup before going live with the survey. This facility adds 50 responses to all questions. Note that this data will not follow the logic and scripts of the survey. Use the Random Data Generator (go to Random Data Generator on page 291 for more information) to generate test data that follows the survey logic.

13.3. Check Script Code

Check Script Code will check your project looking for syntax errors in your coding. Confirmit will check conditions, question and column masks, precode 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 (go to Random Data Generator on page 291 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.

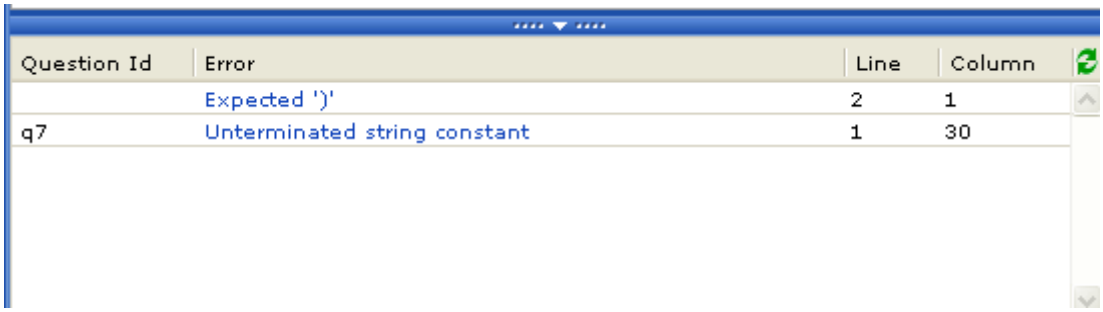


Figure 413 Example of an error list

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.

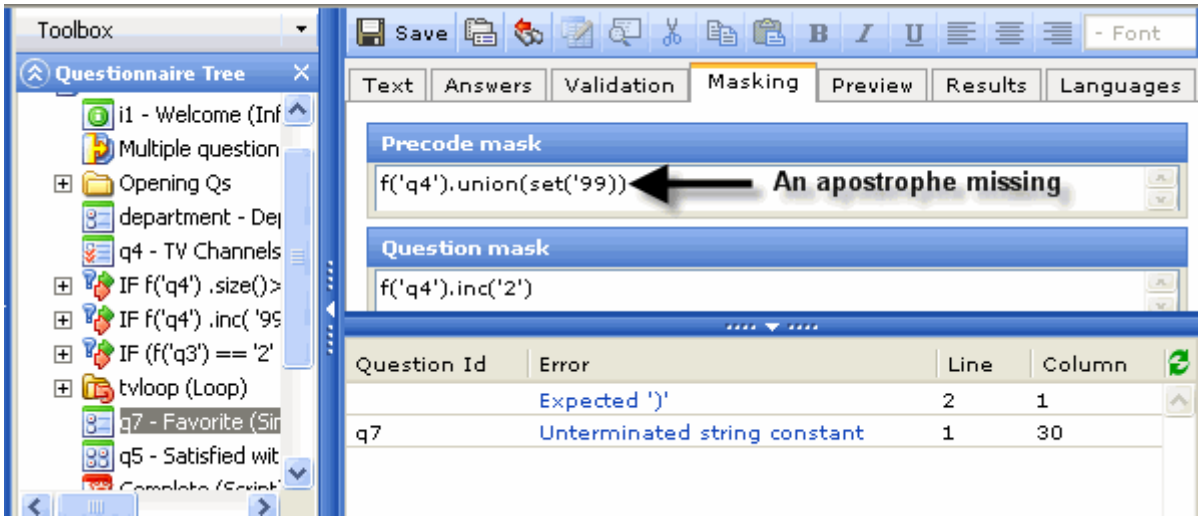


Figure 414 Example of an opened error

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 precode 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 precode 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.

13.4. 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 (go to Random Data Generator on page 291 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.

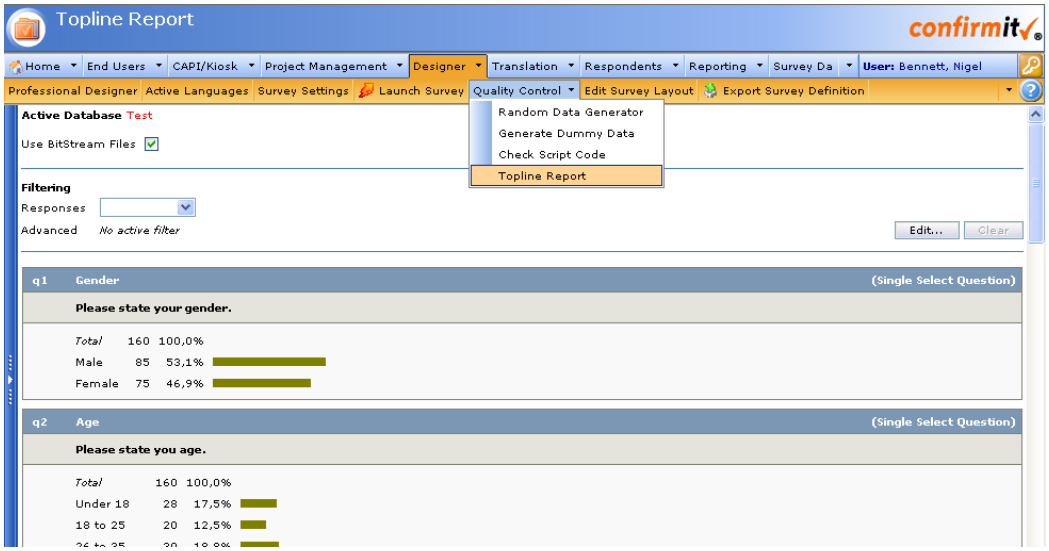


Figure 415 Example of a Topline report

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(go to The Advanced Filter Designer on page 400 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.

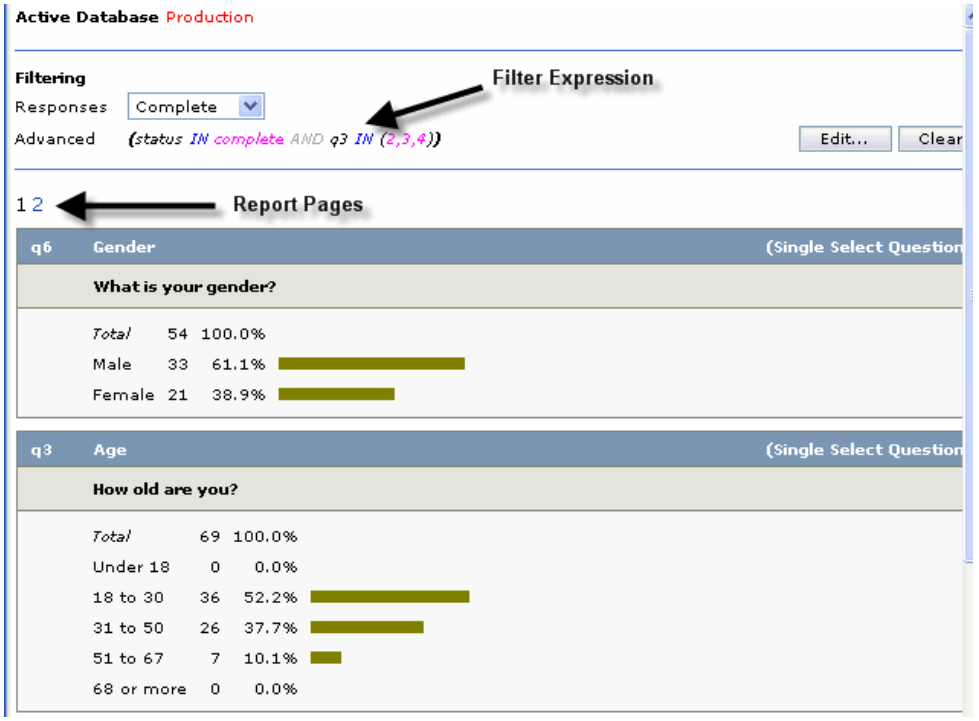


Figure 416 Example of a filtered topline report

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.

13.4.1. Loops in Topline Reports

When you enter the topline report for a loop, you can look at the data for each loop iteration separately.

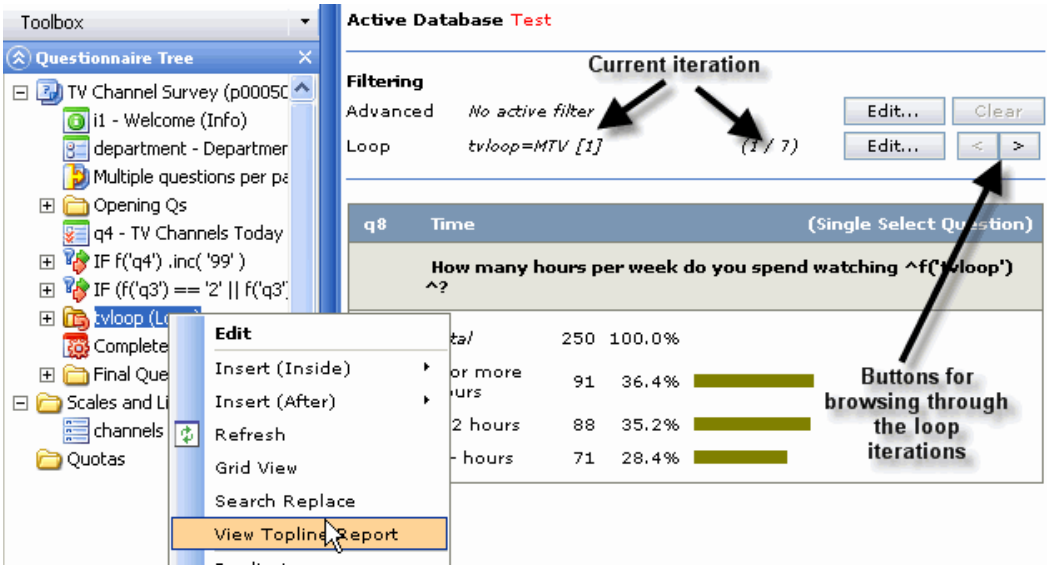


Figure 417 Example of a topline report for a loop

13.5. Quick Test in Professional Designer

In Professional designer, you can test your survey without generating a database. This functionality dramatically increases productivity for designers, particularly when authoring complex surveys. The authors can perform manual tests in test mode while avoiding time-consuming database and WI generations.

1. In the questionnaire tree, right-click on the project folder or on the question from which you want to start the test.
2. From the menu, select Quick Test.

   The interview opens in the pane on the right, as in the example shown below.

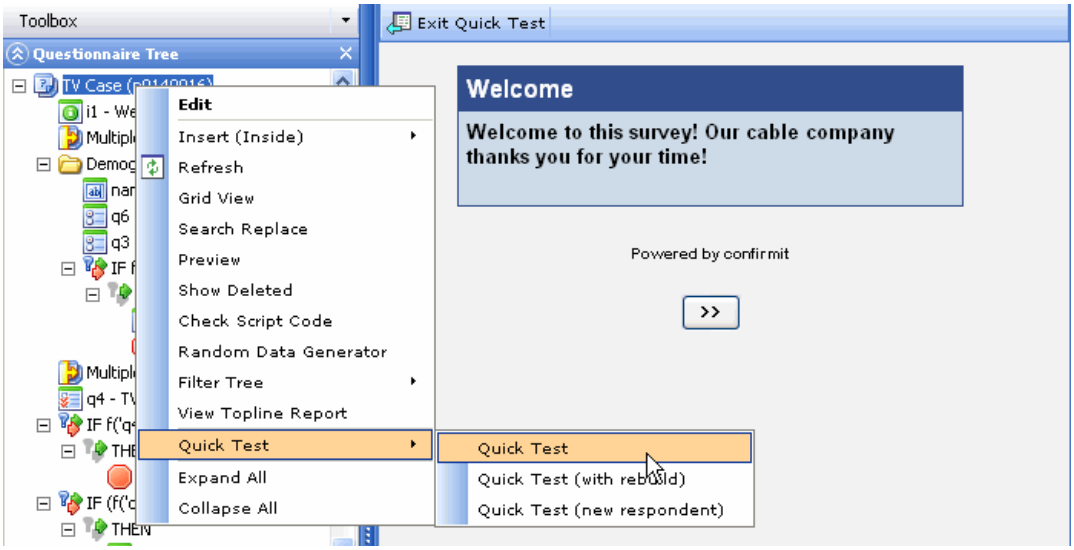


Figure 418 Example of the quick test

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 reenter the Quick Test function during the same authoring session, the 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: Quick test also automatically runs "Check Script Code" before opening the interview, so you will receive immediate notification in the event of syntax errors.

13.6. 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.

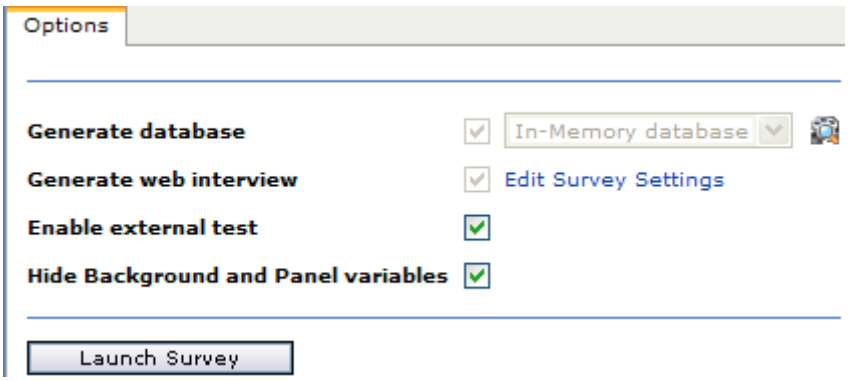


Figure 419 The Launch External Quick Test page

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).

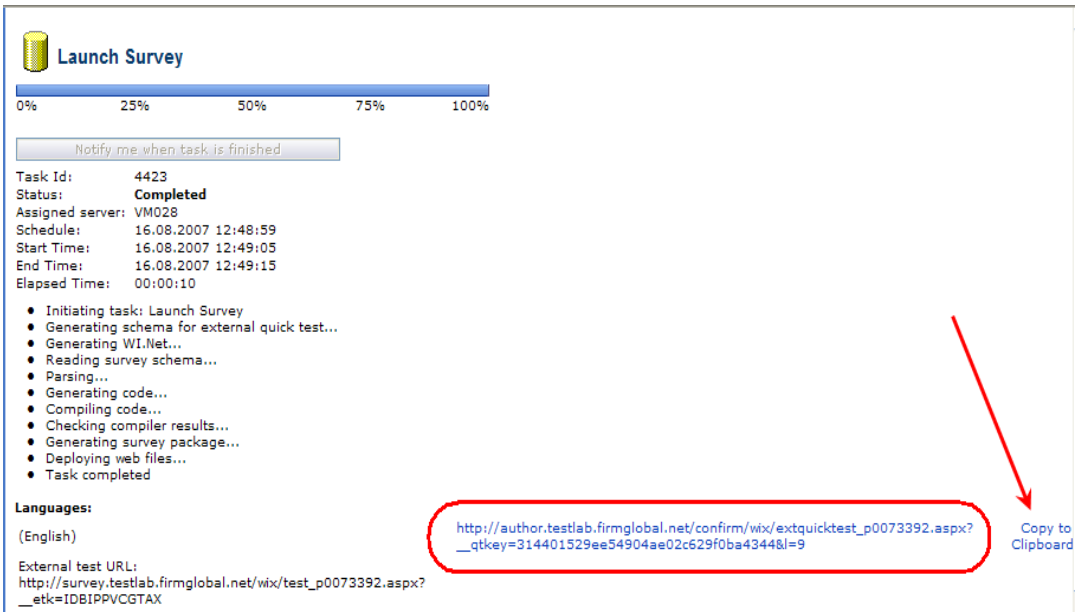


Figure 420 The Task page with the test link

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.

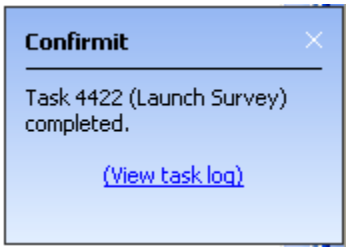


Figure 421 Example of the Task Notification popup

14. Preparing for Data Collection

14.1. Generating 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 response 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.

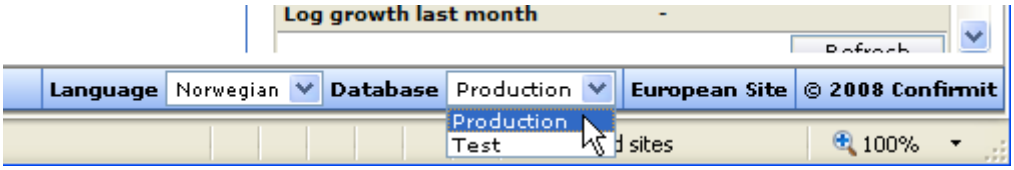


Figure 422 The global database switch

1. To generate the databases for a project, go to the **Designer > Launch Survey** menu command.

   The options page opens.

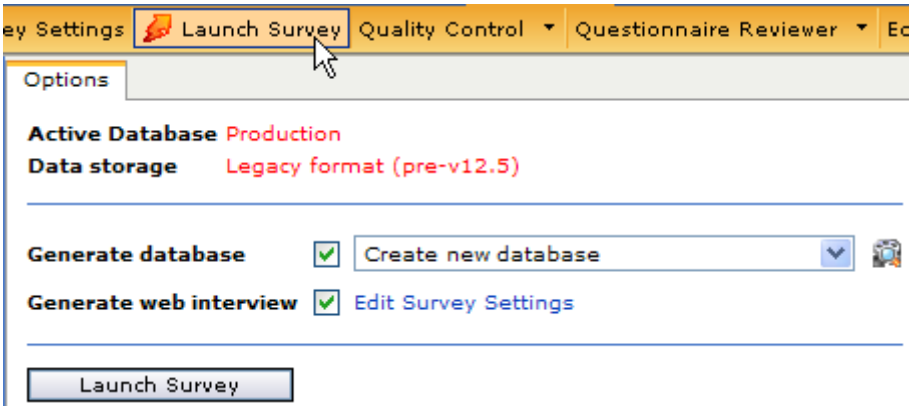


Figure 423 Launching a survey

   The active database (in this case Production) and the type of database selected (in this case the Legacy format) are indicated towards the top of the page. In Launch Survey you can Compile the database and Generate the WI (go to Generating Interview Files on page 309 for more information) in one operation.

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 (go to Enabling External Test Access on page 305 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).

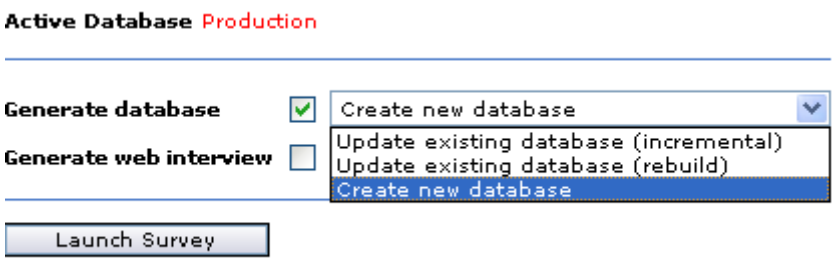


Figure 424 The database compilation drop-down

The options in the drop-down are:

- **Update existing database (incremental) –** the system will update only the recently made changes.
- **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.

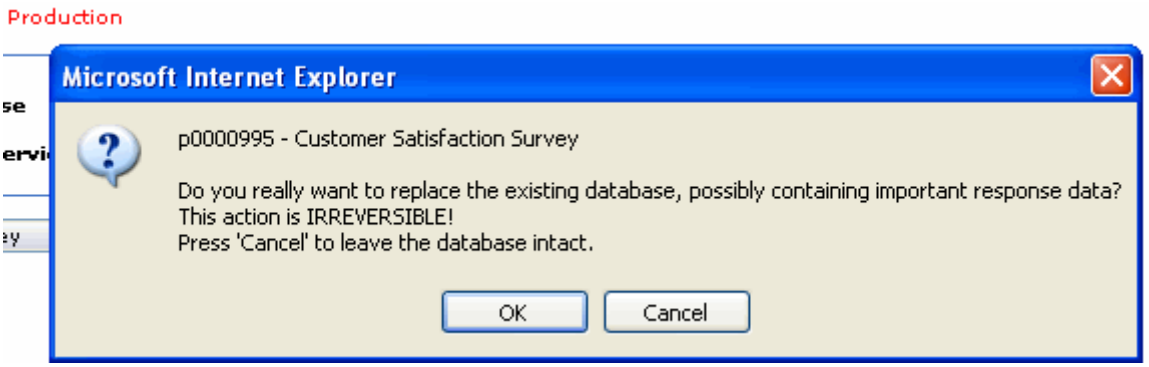


Figure 425 The Create New Database warning message

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 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 precode 1) and a single or open text question with question ID q1_1.
- if you use the same iteration precode twice in a loop.
- if the precodes of the Single and Grid questions occupy more space than specified in Field Width (go to Answers on page 153 for more information).
- if the precodes contain illegal characters. Precodes 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 precode, and are limited to 50 characters. Care must therefore be taken when allocating precodes for grid and multi questions if the precode maximum has been increased above its default setting of 32 characters. (go to Answers on page 153 for more information).

- if the precodes in Answers (Single, Multi, Grid) and Scales (Grid) are not unique. In legacy projects where the Precode 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 precodes.
- if any reserved keywords are used as question IDs (go to APPENDIX C: RESERVED KEYWORDS on page 615 for more information).

The check will also control if the questionnaire has any questions with empty answers or illegal properties (go to Quality Control on page 291 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 Company does not guarantee that test databases are saved on the server for more than two weeks.

14.1.1. Points to Note when Updating an Existing Database

After inserting a question into the questionnaire or moving a question within the questionnaire:

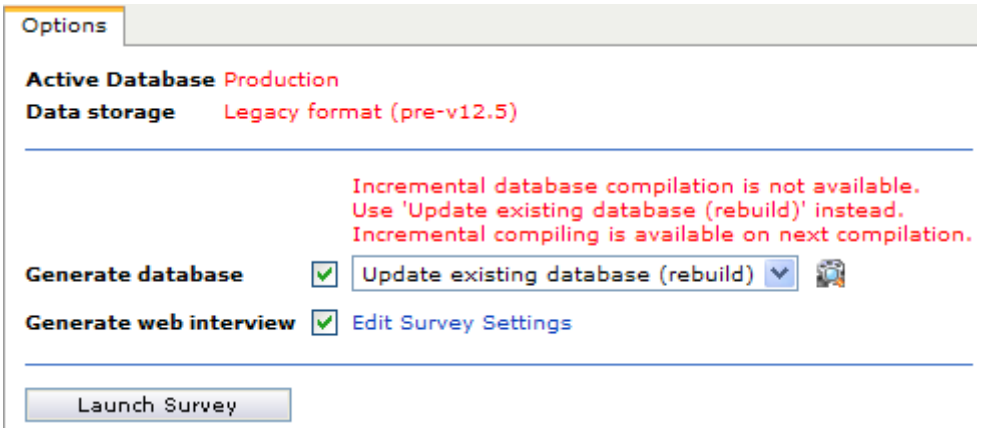
In you insert a question into an existing questionnaire tree either by creating a new question, duplicating or moving an existing question, and you place the question within the questionnaire tree (not on the end), for example q1, q2, **q5**, q3, q4, where q5 is the inserted question, then when you re-launch the survey to update the database, the choices available for "Generate Database" will have the following effects on exported Data:

- **Update existing database (incremental)** - the inserted question will not be in the order as it appears on the questionnaire tree. The question data will be added to the end of the data file. (Example: q1, q2, q3, q4, **q5**, where q5 is the inserted question)
- **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.

Therefore, if you insert a question into an existing questionnaire, do not use the **Update existing database (incremental)** option.

If you have added/changed a language:

If you have added or removed languages since the last time the survey was launched, then you cannot use the **Update existing database (incremental)** option. A message is displayed in the Launch dialog to this effect - see below. Once the survey has been launched with the changed languages, then subsequent launches will allow all three options.



14.1.2. Enabling External Test Access

When launching a survey in the Test database, you have the option to allow access by external users so they can test the questionnaire.

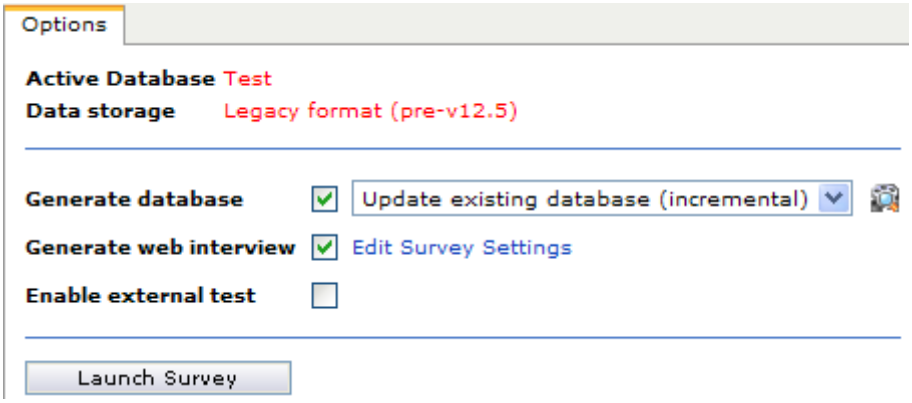


Figure 426 The Launch Options dialog for the Test database

When you select **Enable External Test**, the link for the test survey will be displayed at the bottom of the task execution log. The link contains a cryptic key to prevent unauthorized access to the test survey - see below.

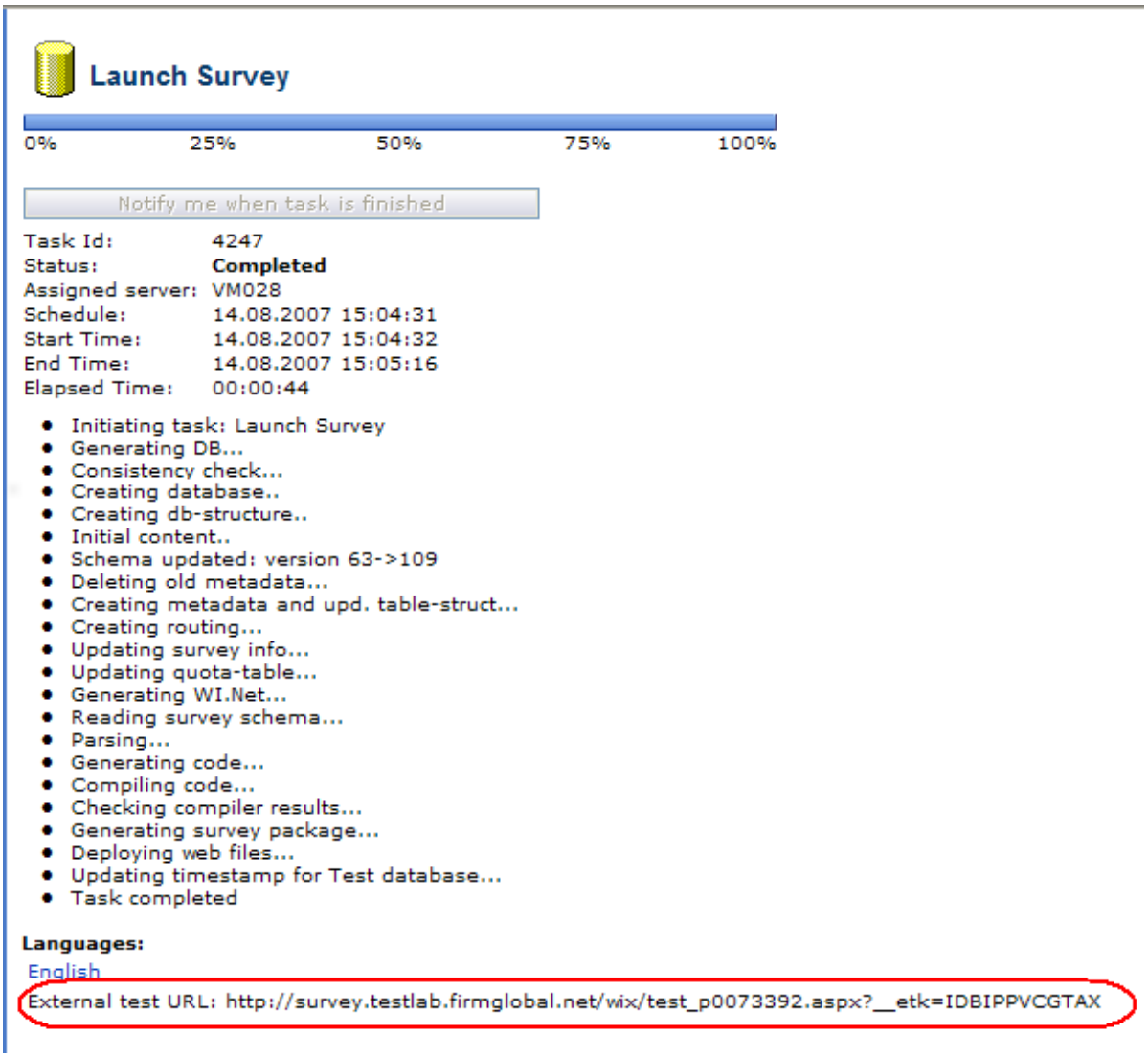


Figure 427 Example of the link on the task log

When the external test function is enabled, the survey files will be made available at the deployment servers.

The external test link is also displayed on the Project Overview page (go to The General Tab on page 132 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: There is a maximum limit on the number of external users that can access the test database to test the survey. This limit is set in the license files, and if no other value is set, defaults to 50. The "External Test Response Limit" is displayed at the bottom of the Interview Progress page. Only Web interviews are counted against this limit, not RDG or Dummy responses.

14.1.3. 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.

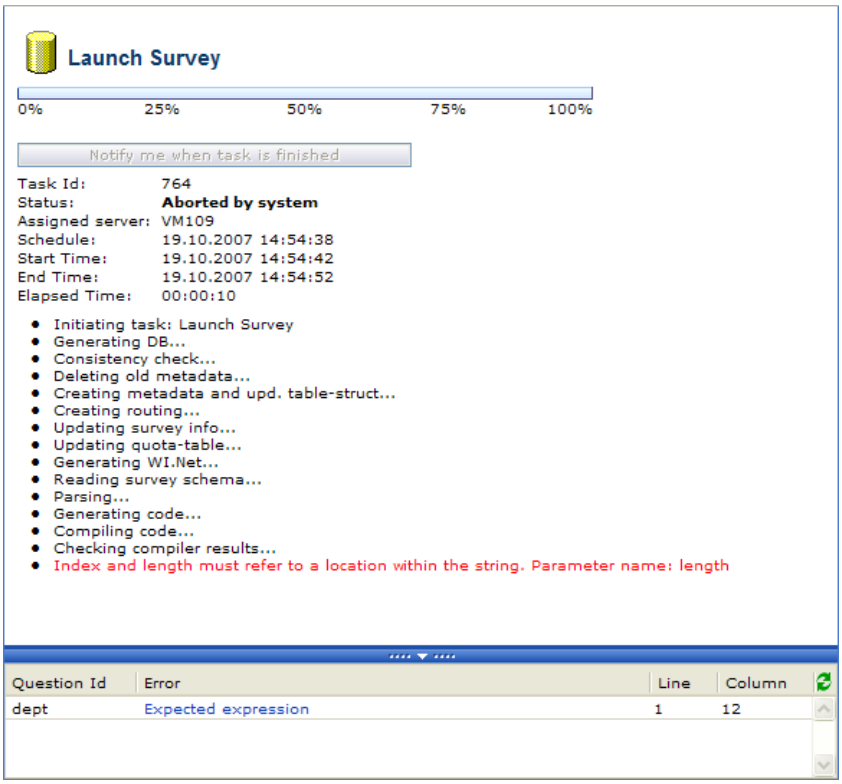


Figure 428 Example of a script error frame with an error link

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.

14.2. 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 (go to Overwriting Running Interviews on page 309 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 (go to The Version Comparison Tool on page 307 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 being set at 10 versions.

14.2.1. 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.

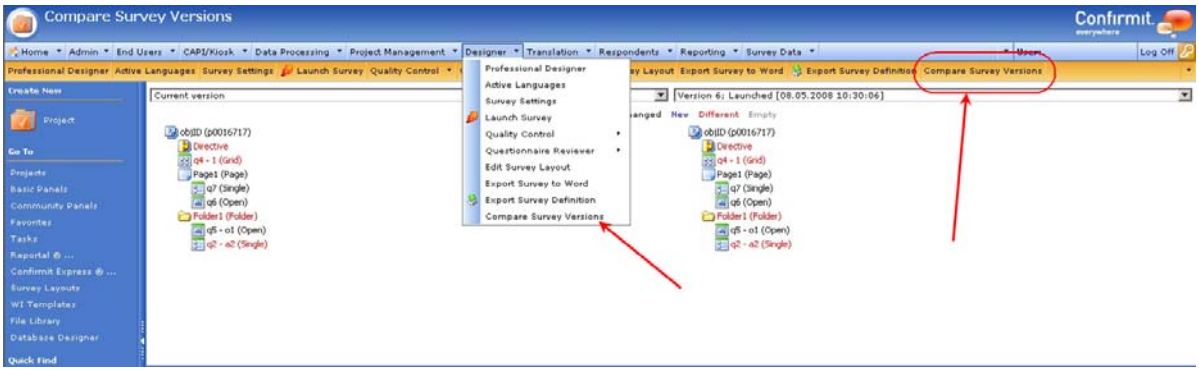


Figure 429 Example of the Survey Versions Comparison window

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 (go to XML Comparison on page 308 for more information).

14.2.1.1. 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.

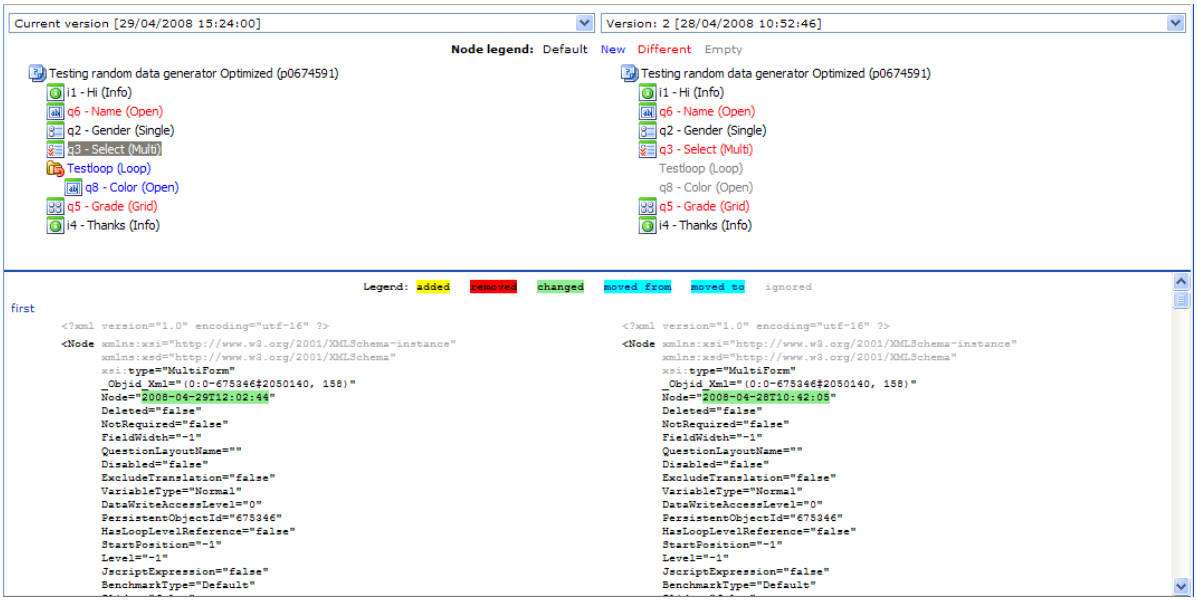


Figure 430 Example of the XML Comparison functionality

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.

14.2.2. Overwriting Running Interviews

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 running interviews to...." box, located towards the bottom of the tab.
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 running interviews..." 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.

14.3. Generating Interview Files

Before you can start interviewing, you must have generated a production response database as described above.

14.3.1. 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. (pXXXXXXX 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.

14.3.2. 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 contains five tabs as follows:

- Survey Channels (go to The Survey Channels Tab on page 310 for more information).
- Web Options (go to The Web Options Tab on page 310 for more information).
- CAPI/Kiosk Options (go to The CAPI/Kiosk Options Tab on page 314 for more information).
- Layout (go to The Layout Tab on page 314 for more information).
- Validation & XSS (go to The Validation & XSS Tab on page 318 for more information).

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 choosing **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 any questions representing background variables and panel variables will be visible in the Test survey and will have to be answered (go to Use of Background Variables on page 322 for more information).

The tabs are described in the following sections.

14.3.2.1. The Survey Channels Tab

The Survey Settings page opens at the Survey Channels tab.

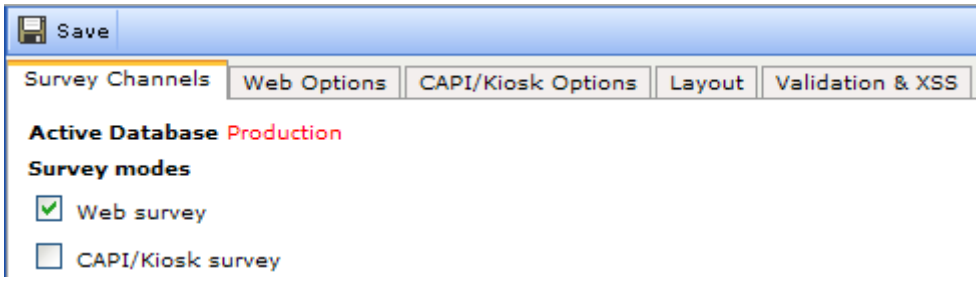


Figure 431 The Survey Settings > Survey Channels tab

Here you define the type of survey - a Web survey, CAPI/Kiosk survey (CAPI is an Add-on, see the separate manual for more information), or both types. Note that you must select the CAPI/Kiosk Survey option to activate the options on the CAPI/Kiosk Options tab.

14.3.2.2. 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 432 The Survey Settings > Web options

The option *Allow respondents to re-enter a completed interview and change their answers* is only relevant for Limited surveys, i.e. the respondent can enter his/her unique link to the survey and modify the answers after having completed the survey. This is not possible in Open surveys.

14.3.2.2.1. The Web Options Tab Properties

Include Back Button

Back buttons allow the user to step backwards in the questionnaire and review/modify previous answers. This option is selected as default. It also forces the ***Allow respondents to change their original answer*** option described below to true.

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, for example:

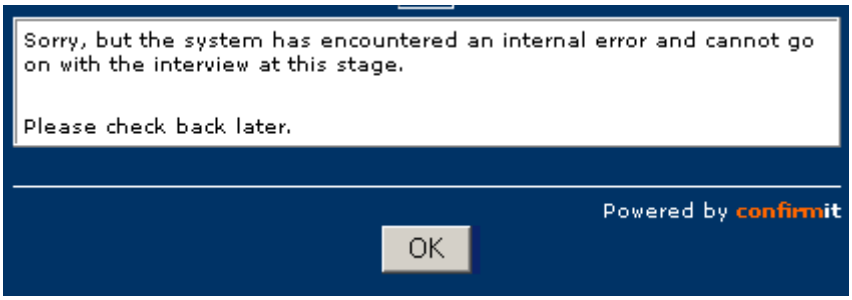


Figure 433 Example of an error message

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, precode mask, condition or expressions. In Test mode, this specified error message will also be displayed in the survey, next to the general error message.

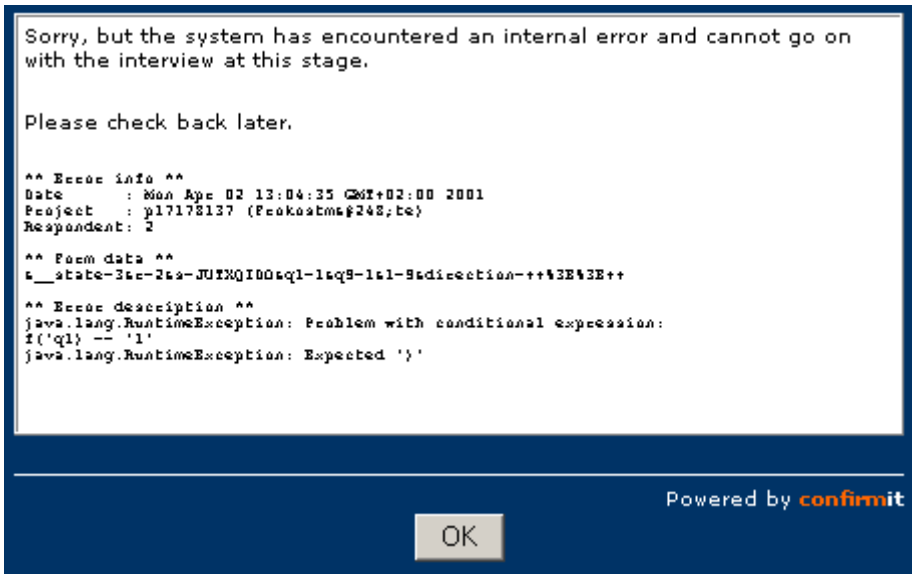


Figure 434 Example of the Test Mode error message

Enforce HTTPS Access to Survey

Check this box to enforce HTTPS use by people accessing the survey.

Encrypt System Request Parameters

This property increases the security of the system. Leave this box checked to encrypt system request parameters such as:

r, s, __state, __loop, __seqno and __version

These will not then be shown in clear text, but encrypted in a __sid__ parameter. This applies to both hidden form fields and URL parameters. Respondent links will then take the form as follows:

/confirm/wix/test_p0003502.aspx?__sid__=KKCCKburQTJA0nxoy3zppzwMNq7TPEZCTqPH8EzXazrpu2_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 a internal error page being shown with an http status code.

The default value for new surveys is "checked".

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. 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.

Default Language for the Interview

This option is only displayed for multi-language surveys. The language selected here becomes the default used when no language information is available in the request used to access the interview or in the respondent list.

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^ (go to Templates on page 79 for more information) in order 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:

- If a respondent has completed the questionnaire and attempts to return to it, then the interview program displays a “Survey already completed” message.
- 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.
- 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, i.e. the respondents have reached the OK page.

The Survey Type Options

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 (go to Handling Respondents in Limited Surveys on page 322 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 desires to do so. As such, they are suitable for surveys where the respondents' identities cannot be established in advance, for example Web site evaluations.
- **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. 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 Surveys** - each respondent may be provided automatically with a unique link to the survey, which includes identification credentials. If you choose to run the survey from a secure site, a cryptic link to the survey will look for example as below:

  http://survey.confirmit.com/wix/pXXXXXXX.aspx?r=112&s=VDDNCVPK&l=9 or

  https://survey.confirmit.com/wix/pXXXXXXX.aspx?r=112&s=VDDNCVPK&l=9

  r= sequential respondent number assigned by the system

  s= randomly generated 8 digit code, uniquely produced for each respondent. This means that there are 26^8 alternatives.

  L = the language in which the respondent receives the survey.

- **Limited Survey with Login Page** - a limited survey may include a login page where the user enters a user name and a password to participate. Check this option if you want this mode of operation. Remember to include user name/password information in the respondent lists (go to Preparing the Respondent List on page 322 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 (go to Generating Interview Files on page 309 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.
- **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.

14.3.2.3. The CAPI/Kiosk Options Tab

Note: The CAPI/Kiosk functionality is an add-on. This tab will only be visible if your company has licensed the add-on.

The options on the CAPI/Kiosk Options tab only become active when the **CAPI/Kiosk Survey** option is selected in the Survey Channels tab.

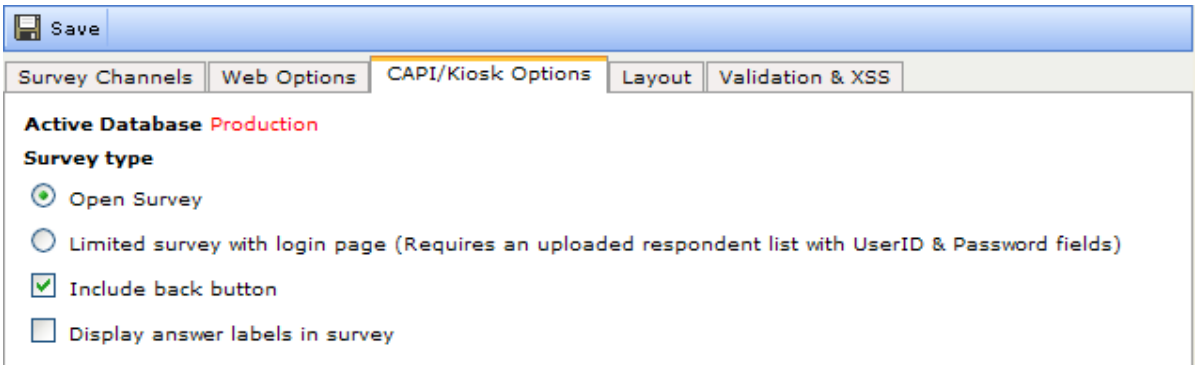


Figure 435 The CAPI/Kiosk Options tab

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 precodes in survey** - check to include the precodes beside the answer labels on the question pages in the survey.

14.3.2.4. The Layout Tab

Use the options in the Layout tab to choose the look and feel of the survey.

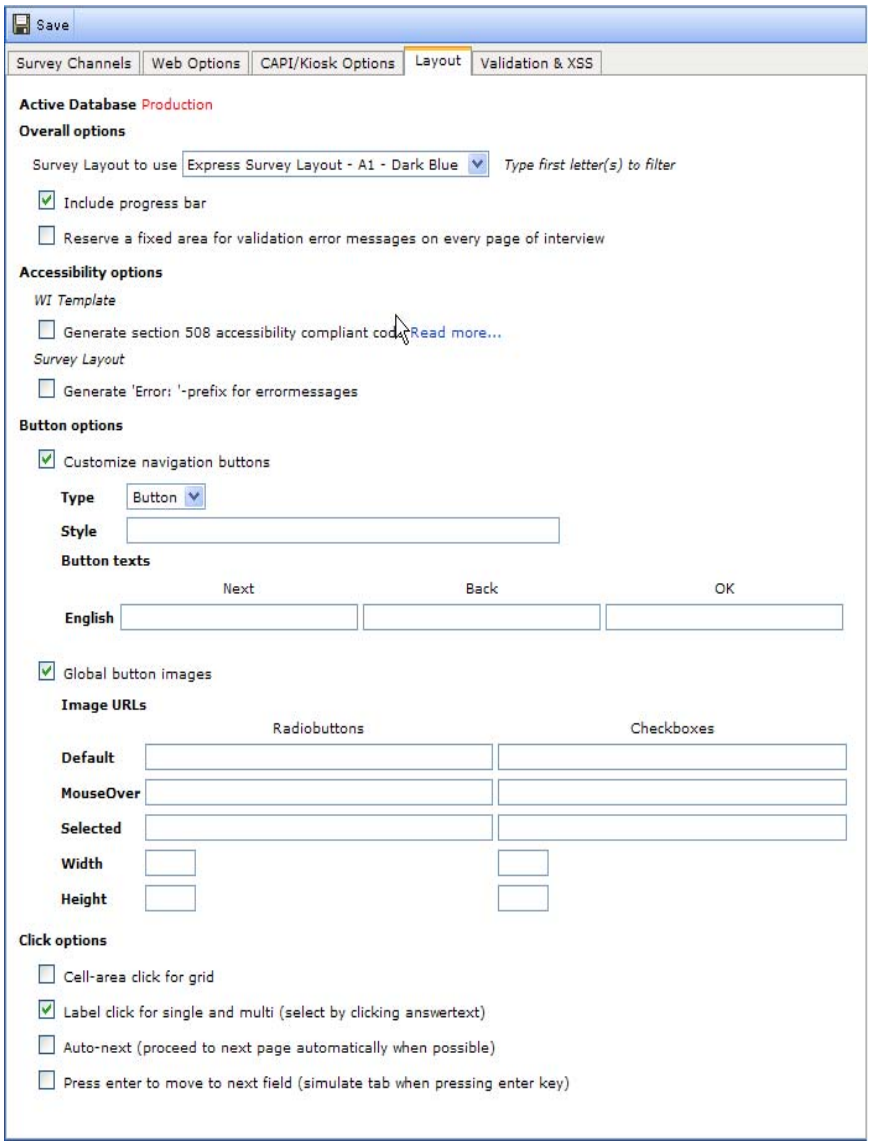


Figure 436 The Survey Settings > Layout tab options

14.3.2.4.1. The Layout Tab Properties

Web Interview Template to Use

In this field you may choose among WI templates you have predefined (go to Templates on page 79 for more information) and apply them to your project.

Use Survey Layout

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/

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.

Generate Section 508 Accessibility Compliant Code

When this option is chosen the survey will be generated according to section 508 accessibility guidelines. The option is available only when Web Interview Templates are used. The Survey Layouts comply with the web accessibility requirements.

Read more: http://www.access-board.gov/sec508/508standards.htm, http://www.w3.org/WAI, http://www.w3.org/TR/WCAG10/

Note: 3D grids are not supported by this functionality.

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 (go to The Advanced WI Features Tab on page 164 for more information).

1. Check the box to open additional input fields as shown below.

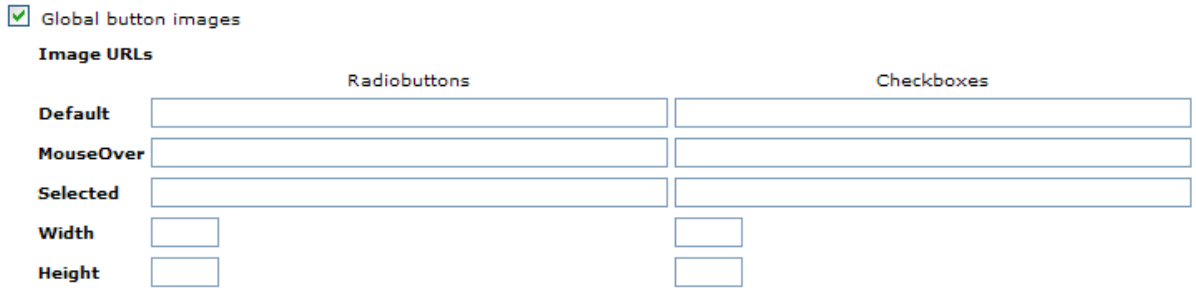


Figure 437 The Global Button Images input fields

2. Type or copy into the appropriate fields, the URLs and file names of the image files you wish to be used for the various instances.

   You can define up to three different images for radio buttons and checkboxes;

   - **Default** - the "standard" image that will be used while the respondent has not placed the mouse onto the image area or selected the answer option.
   - **MouseOver** - the image that will be displayed when the respondent moves the mouse pointer over the area of the image.
   - **Selected** - the image that will be displayed when the respondent has clicked onto the image area.

Note: To ensure the images are displayed correctly, the image files should be stored in the file library (go to File Library on page 123 for more information).

4. Specify the width and height, in pixels, with which the images are to be displayed.
5. Save the changes.

Insert Label for 'Other' Inputs

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 Insert label for 'Other' inputs, which means that text "Please specify if Other is chosen" will appear in front of answer options with "Other, Specify".

Cell – area Click for Grid

This feature enables the respondent to click the cell area around the radio button in grids and 3D-grids, and the cell will then be colored to clearly display which option has been selected.

The background color of the cells is defined by the *Grid color* attribute in the WI template editor.

If the *Button images* feature has been set for the question, clicking the cell-area will cause the image to switch to the selected image.

Note: If the *Button images* property has been globally defined (on the Generate WI page), then in 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.

14.3.2.5. The Validation & XSS Tab

Use the Validation 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.

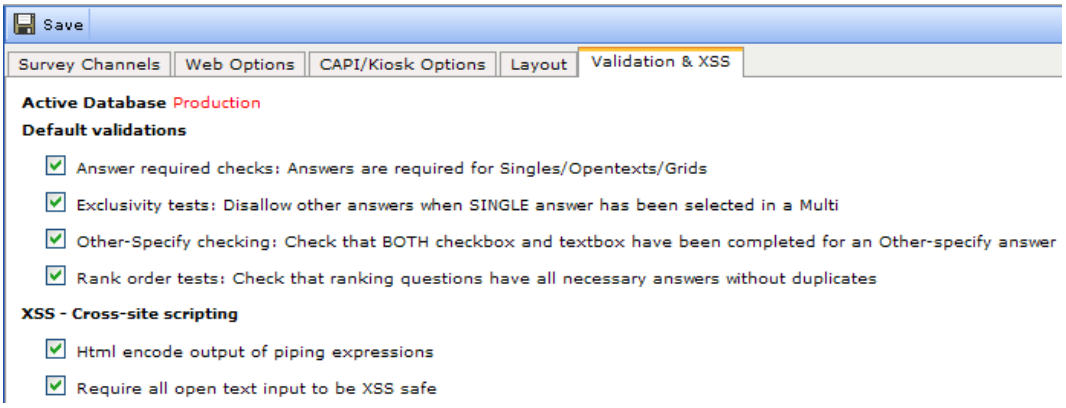


Figure 438 The Survey Settings > Validation & XSS tab options

14.3.2.5.1. 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 Ordered questions and Grid questions are unique for each alternative in the list, and consecutive. The questions must be marked as Ordered in Properties (go to Question Properties on page 160 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 >.

14.3.3. 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 (go to The Web Options Tab on page 310 for more information), then launch the project in the **Test** database, then the Pop-up Wizard opens (go to The Pop-up Script Wizard on page 319 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 on page 313 for more information), then save the changes.

14.3.3.0.1. 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 on page 313 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.

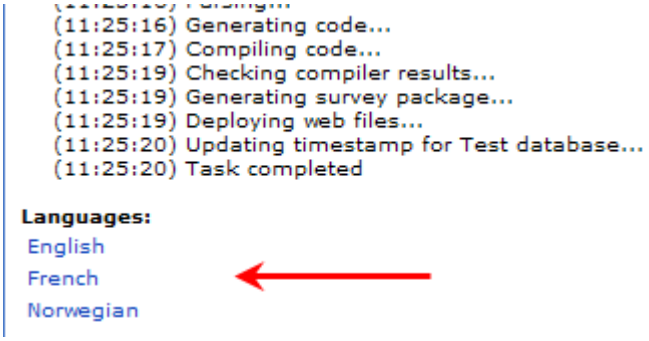


Figure 439 Example of the links resulting from the launch task

Click a link to open the Pop-up Wizard, as shown below, and an example pop-up window with the survey as it will appear to the respondent.

Note: The links open the survey in the example window in the selected language. Settings made in the wizard apply identically to all the languages - you cannot set up the window differently for different languages.

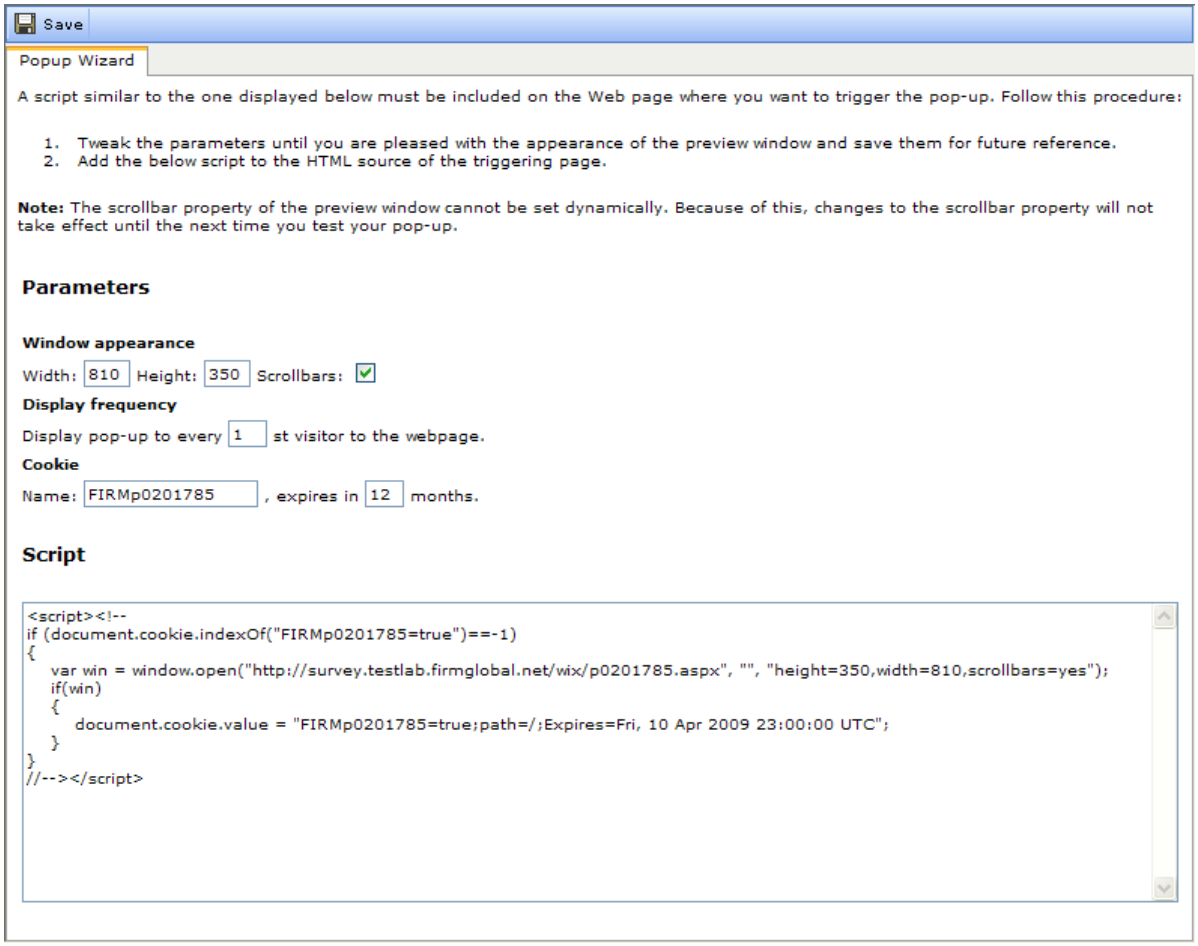


Figure 440 Example of the Pop-up Script Wizard

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 (go to An Example of a Script for Pop-up Surveys on page 320 for more information).

Any changes you make to the Pop-up script will be applied to the survey the next time you generate the web interview in the Production mode. Note that you cannot return to the wizard once you more away from it; you must re-launch the survey in the Test mode to re-open the wizard.

14.3.3.1. 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, boarders are dragable.
- **copyhistory=no** - allows for tracking of links activates the back or forward buttons.
- **scrollbars=yes** - automatically include scrollbars on the window if needed.
- **height=360** - the height of the window in pixels.
- **width=300** - the width of the window in pixels.

15. 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 (go to The Web Options Tab Properties on page 311 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.

15.1. 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** (go to Question Properties on page 160 for more information).

15.1.1. 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:

- EmailDepartment (Administration, Marketing, Support, Sales)
- Visited websites (confirmit.com, altavista.com, yahoo.com, lycos.com)

A respondent can have one email address, can belong to one department, and can have visited several websites.

- In the survey, add three questions: one Open question with ID “email”, one single question with ID “dept”, and one multi question with ID “Web”.
- In the single question “dept” insert four answers, one for each department, Administration, Marketing, Support, Sales, in Precodes 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 precodes 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 precodes 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: Avoid using reserved keywords as column headers in respondent lists. The system will however perform a check during the upload process, and generate an error message **(go to APPENDIX C: RESERVED KEYWORDS 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 **(go to Blocks on page 181 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.**

15.2. Uploading 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. To do this:

1. Go to the **Respondents > Upload** menu command.
2. The Upload Settings dialog opens.

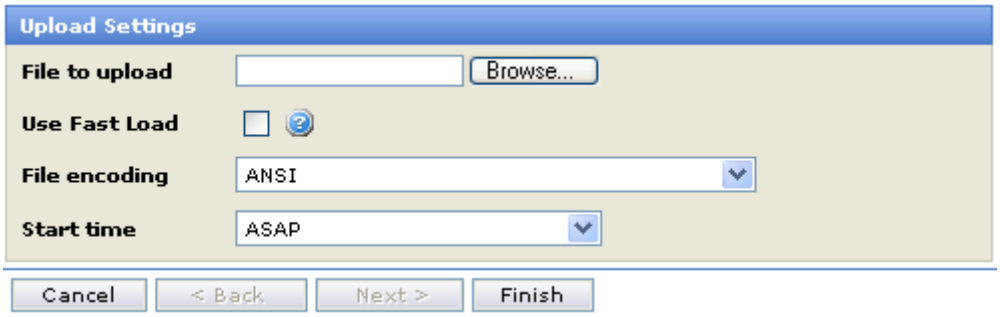


Figure 441 The Upload Settings dialog

3. Click **Browse**, then find and select the required respondent data file.
4. Check the **Use Fast Load** box if you wish to lock the database while the loading operation is in progress. This will allow the operation to run faster.

Note: Do not use this option if the database is live and in production.

5. In the **File Encoding** drop-down menu, choose the encoding method used by the respondent list. Click **more…** to expand the list.

Note: The respondent list must be a Tab-delimited text document saved using the encoding format you select in this dialog.

6. Select the desired start time.

   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 (go to Scheduling an Email for Later Execution on page 516 for more information). This dialog enables you to set up the date and time for when you wish the upload to commence.
7. 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.

15.2.1. Respondent Uploading with Access to Data Transfer Encryption and FTP

Note: Data Transfer Encryption and FTP is an Add-On (go to Data Transfer Encryption and FTP on page 2 for more information).

For secure transfer of respondent data, you should encrypt the respondent file using Confirmit's public encryption key and then upload the file to Confirmit's FTP server. To do this:

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.

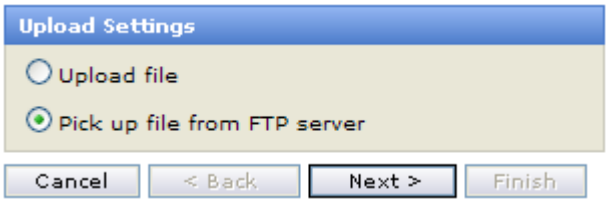


Figure 442 The Upload Respondents dialog

3. Click **Next**.

   The Upload Settings dialog opens.

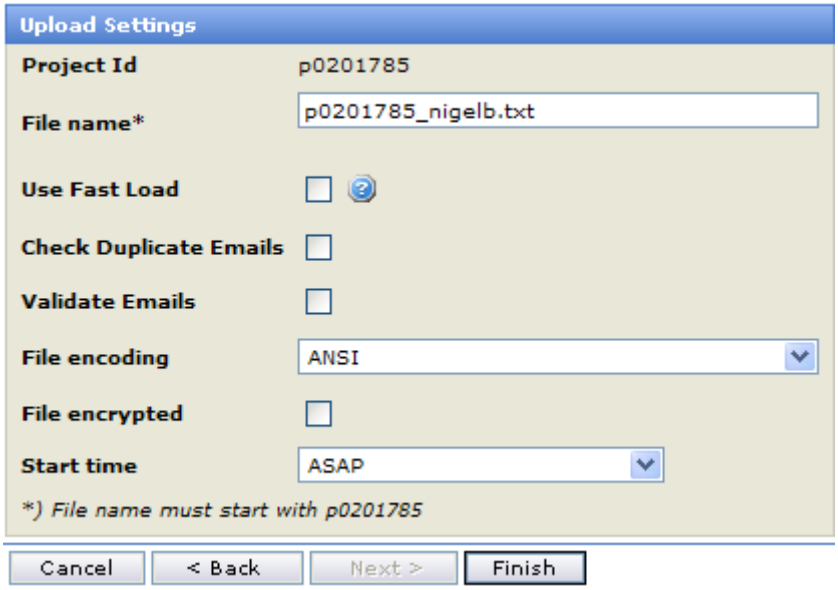


Figure 443 The Upload Settings dialog

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.

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.
- **Use Fast Load** - select this option to run the upload faster. Note that this will temporarily lock the survey, so do not select the option if the survey is being accessed by respondents.
- **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.
- **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.
- **File Encrypted** - only available/displayed to users with FTP and Data Transfer Encryption (go to Data Transfer Encryption and FTP on page 2 for more information). The import files can be encrypted and uploaded from an FTP server. When this setting is enabled, the import files will be encrypted.

- **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.

15.3. 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 editor is linked to the Emailing Report functionality (go to Email Delivery Report on page 346 for more information), and any changes that are performed there will be reflected in the Respondent Editor.

It is not possible to edit via the Respondent Editor any answers that the respondents have given to questions in the survey.

15.3.1. Enter/Remove Search Fields

To open the respondent data editor, go to the **Respondents > Edit** menu command.

The editor page is divided into three frames. The upper right frame holds action buttons, search fields and buttons, and fields for adjusting the number of displayed respondents per page. The lower right-hand frame is for displaying and editing respondent data. The frame size is dynamic, and you may drag the internal border up and down. The frame on the left side displays all User fields and All system fields for a survey. If you click on a variable in this frame, a pop-up window will open where you can change the value of this variable for all respondents in the current search result.

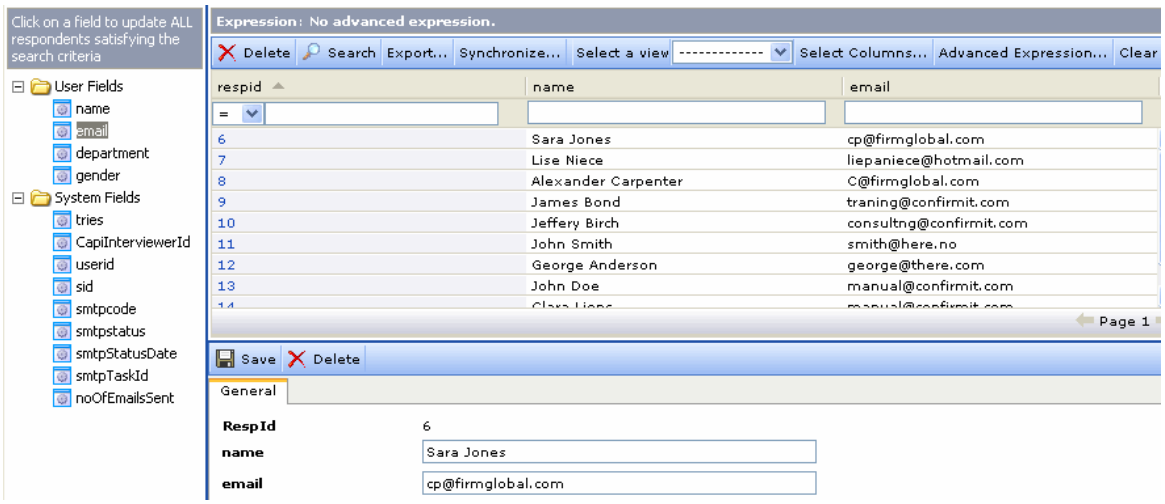


Figure 444 Example of the Respondent Data Editor

Note: The SMTP fields will be available when Email Delivery Report is activated (go to Email Delivery Report on page 346 for more information).

The data fields and buttons are as follows:

- **respid** - search field for respid. You can search for respondents by specifying the respid or a range of respids.
- **CapiInterviewerId** - shows the ID of the CAPI interviewer to which the current respondent has been assigned. See separate manual for CAPI.
- **userid** - shows respondents’ userid that is uploaded together with a password to enter limited surveys with login.
- **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 SmtpStatus.
- **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.
- All **User Fields**, for example, name, email, etc. - all variables/fields that are uploaded into the survey with the respondent list.
- **Search** - performs a search when the search parameters have been defined.
- **Delete** - deletes the selected respondent(s)
- **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 (go to Synchronization on page 335 for more information).
- **Select a View** - the drop-down will display Views that you have predefined in Select Columns. The respondents will be displayed according to the chosen View.
- **Select Columns** - opens a pop-up window where you can select search fields/columns that are to be displayed. 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 pop-up window with a text field where you can write advanced SQL code. This makes it possible to make more advanced combinations in the search. When you define an expression, save it, then click search, the advanced expression will be used on the search result. It will say in the main window: “Advanced expression in use” when an expression is active, and “No advanced expression” when it is removed.
- **Clear Advanced Expression** - removes the Advanced Expression from the search.

15.3.2. Select Columns and Define a View

When you enter Respondent 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, meaning that these columns are currently not displayed in Respondent Editor view.

   To add the variables/columns to the Selected items:

2. Either double-click the variable in the Available items column, 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 column, follow the same methods, but click the **<<** button if you choose the items by ticking the check-box.

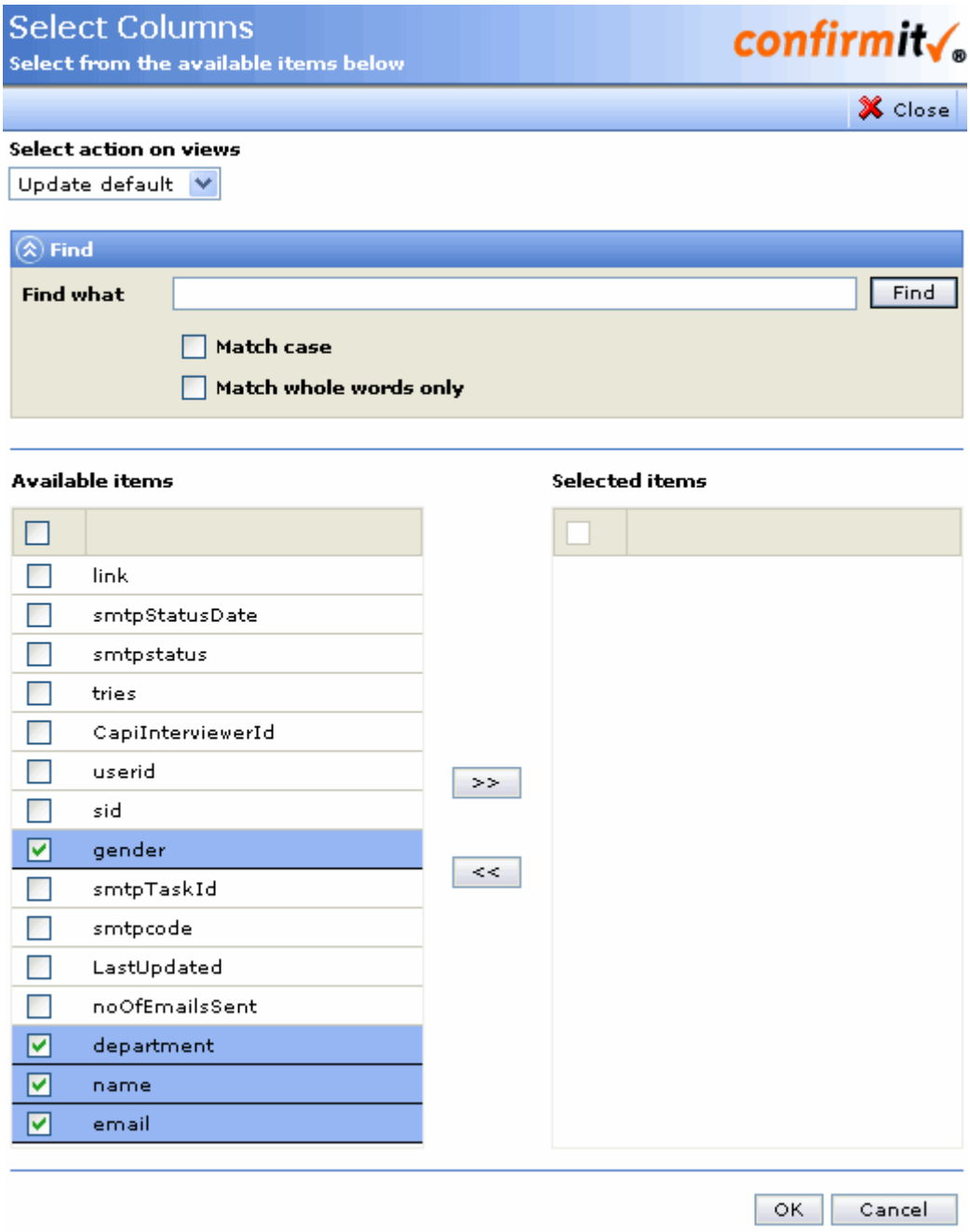


Figure 445 Selecting Available items

If the list of Available items is very long, you can search for items using the “Find what” field.

3. When you have moved the desired fields over to the “Selected items” list, leave the “Select action on views” drop-down on “Update default” and click the **OK** button.

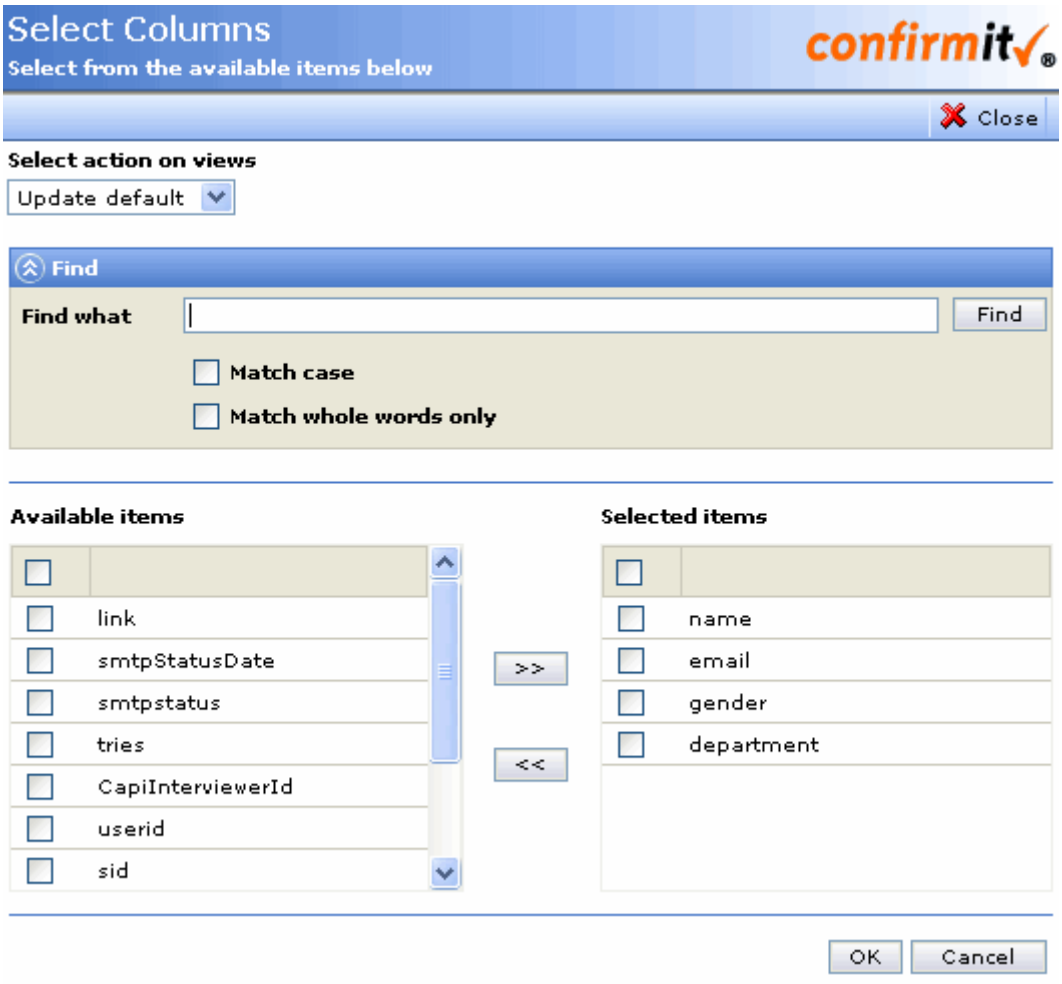


Figure 446 Some fields selected

All the fields selected will appear as search fields in the main Respondent editor window.

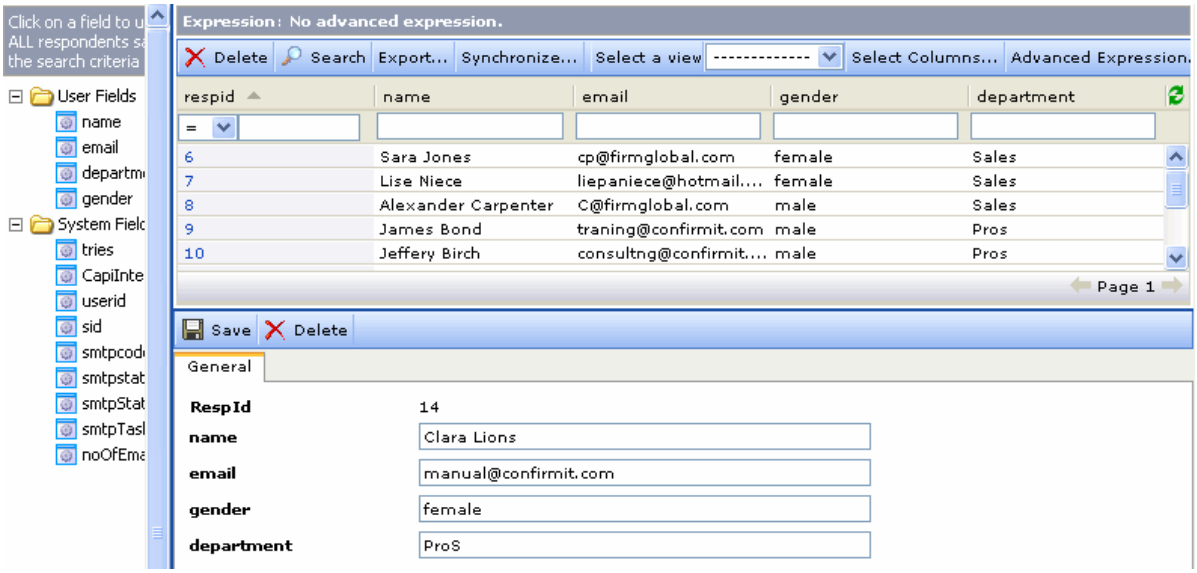


Figure 447 The selected columns shown In the main window

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 Selected Columns window, go to the **Select action on views** drop-down and select **Save As New**.

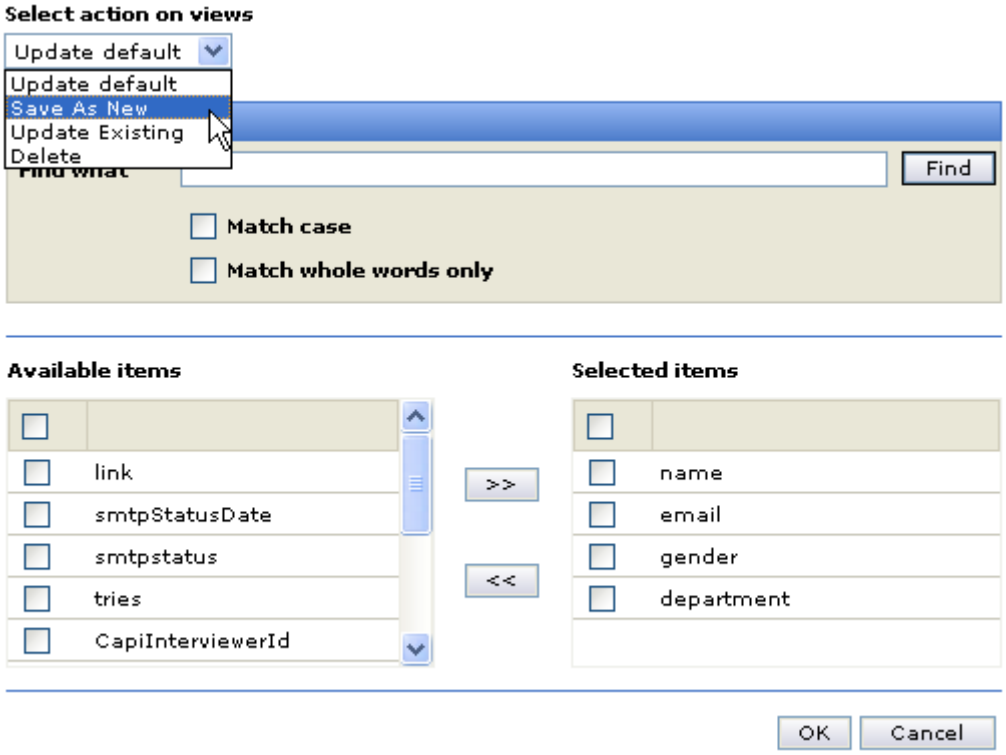


Figure 448 Saving a new View

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.

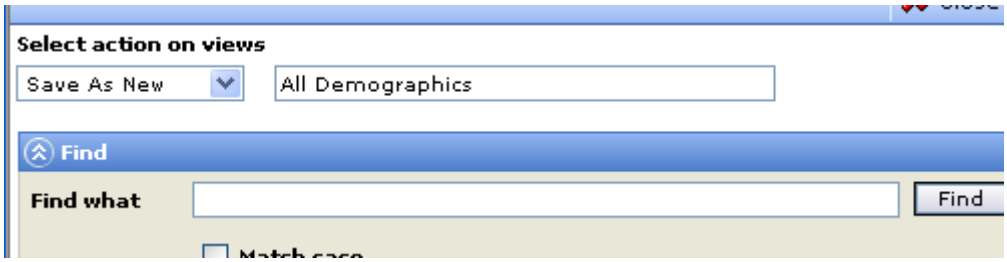


Figure 449 Naming the View

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.

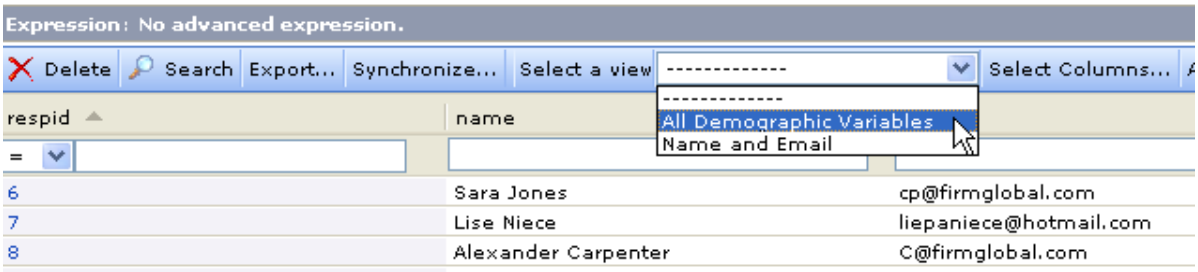


Figure 450 Example of the Select a View drop-down

15.3.3. To Search

To conduct a search, write information in 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. The result will be listed below the fields. To change the search, edit and/or remove the text in the field(s).

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.

If the Advanced check box is checked, an open text field appears in which you can write advanced SQL search code. 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).

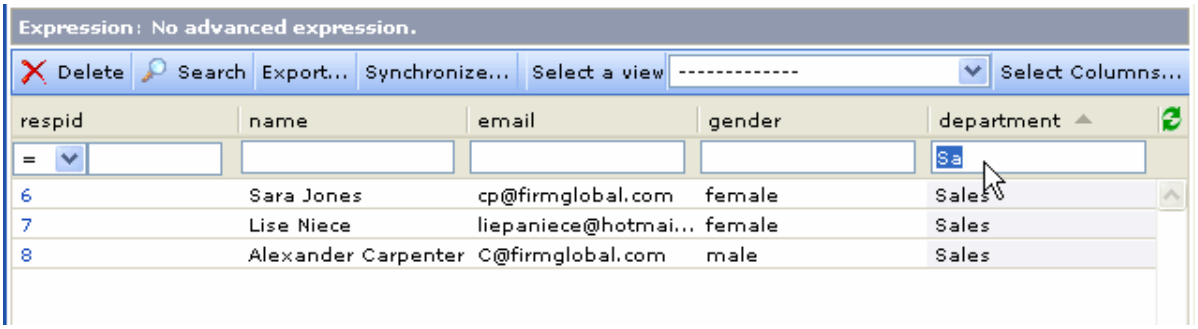


Figure 451 Making a Search

You can sort the respondents by clicking on the column/search field headings.

15.3.3.1. 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.

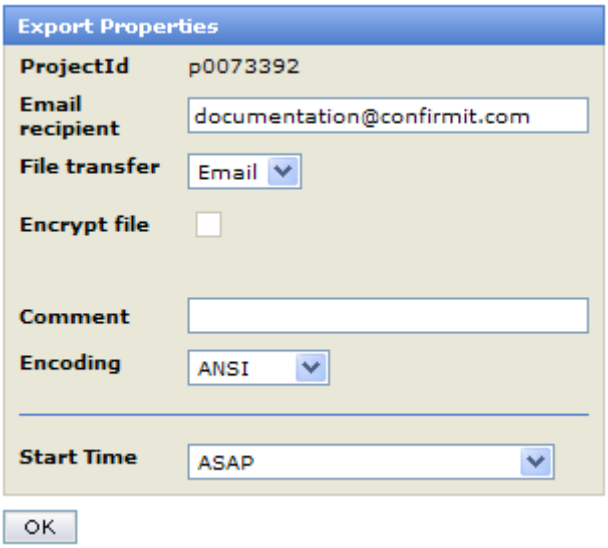


Figure 452 Example of the Export Properties window

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.

15.3.3.2. Respondent Export with Access to Data Transfer Encryption and FTP

Note: Data Transfer Encryption and FTP is an Add-On (go to Data Transfer Encryption and FTP on page 2 for more information).

In the Export Properties page, in addition to the other settings, you will need to select the Encrypt file option. The encrypted file can then be either sent by email, or sent to the FTP server. The recipient will have to decrypt the received files by using his/her private PGP encryption key.

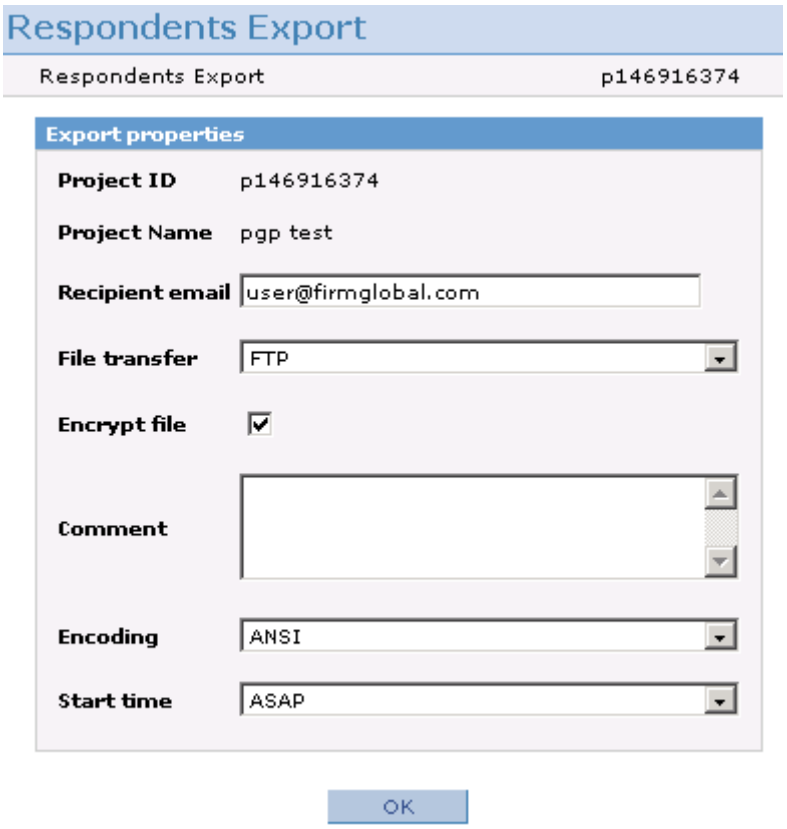


Figure 453 Respondent export with encryption

If you choose to send the encrypted file to the FTP server, the address specified in the Recipient Email field will receive a notification email from Confirmit that the file is available for download. The recipient will then have to log on to the FTP server, download the file, and then decrypt it with their private encryption key.

15.3.4. 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.

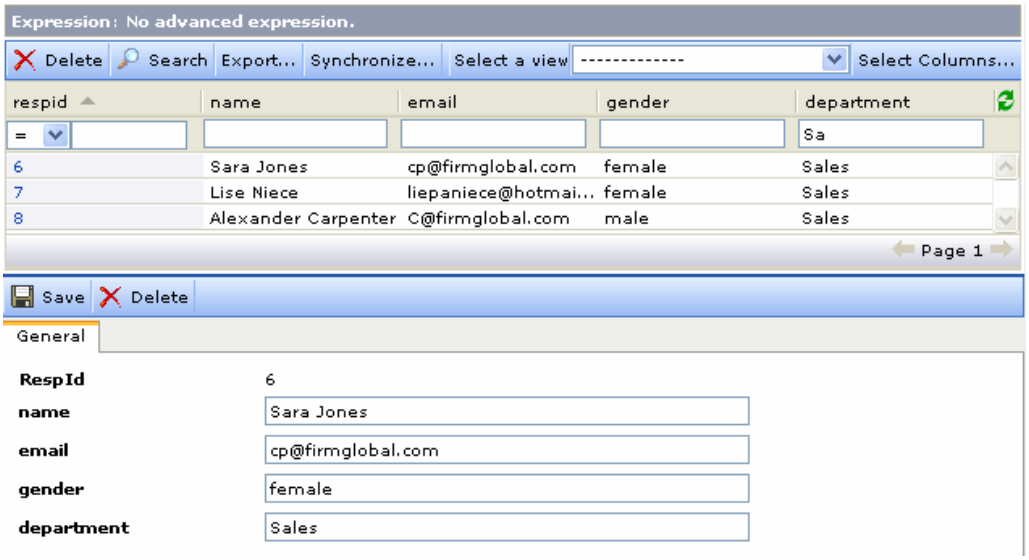


Figure 454 Updating respondent data

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. 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.

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.

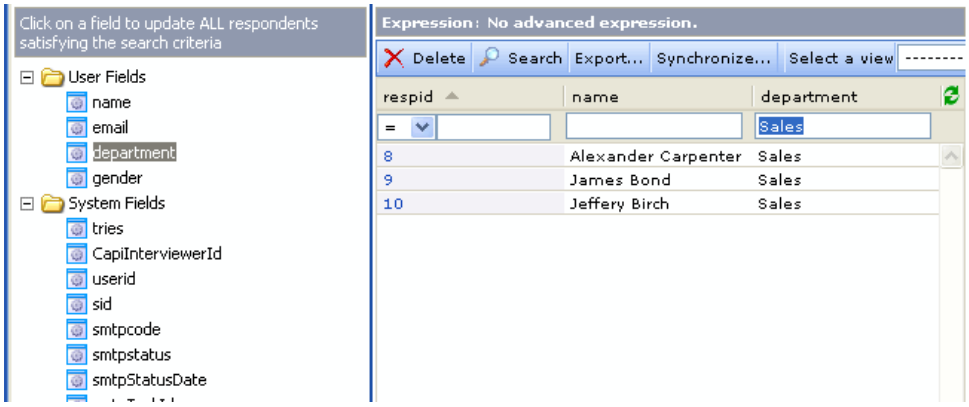


Figure 455 Updating Sets of Respondent Data - 1

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**.

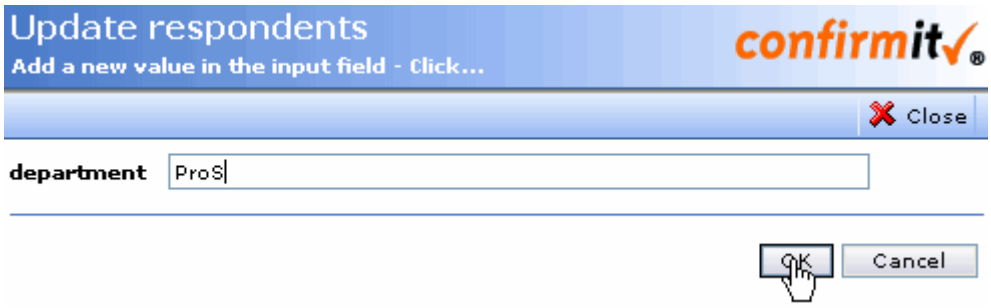


Figure 456 Updating Sets of Respondent Data - 2

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.

15.3.5. 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 then will be given the status "incomplete", and it will then for example be impossible to search for them in the email system as "Not answered".

- 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 done 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.

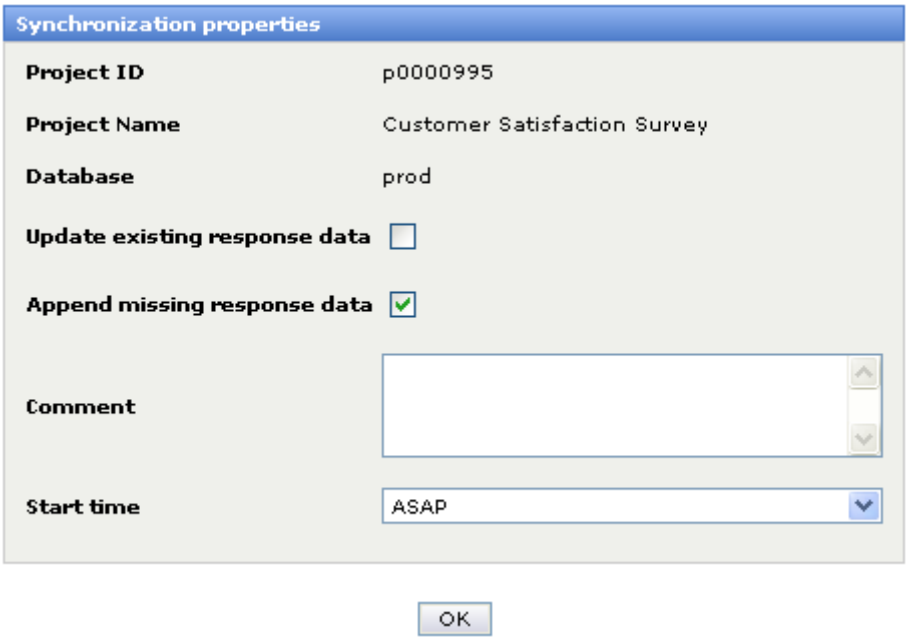


Figure 457 The Synchronization properties window

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.

15.4. 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.

15.4.1. 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 (go to Email on page 186 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.

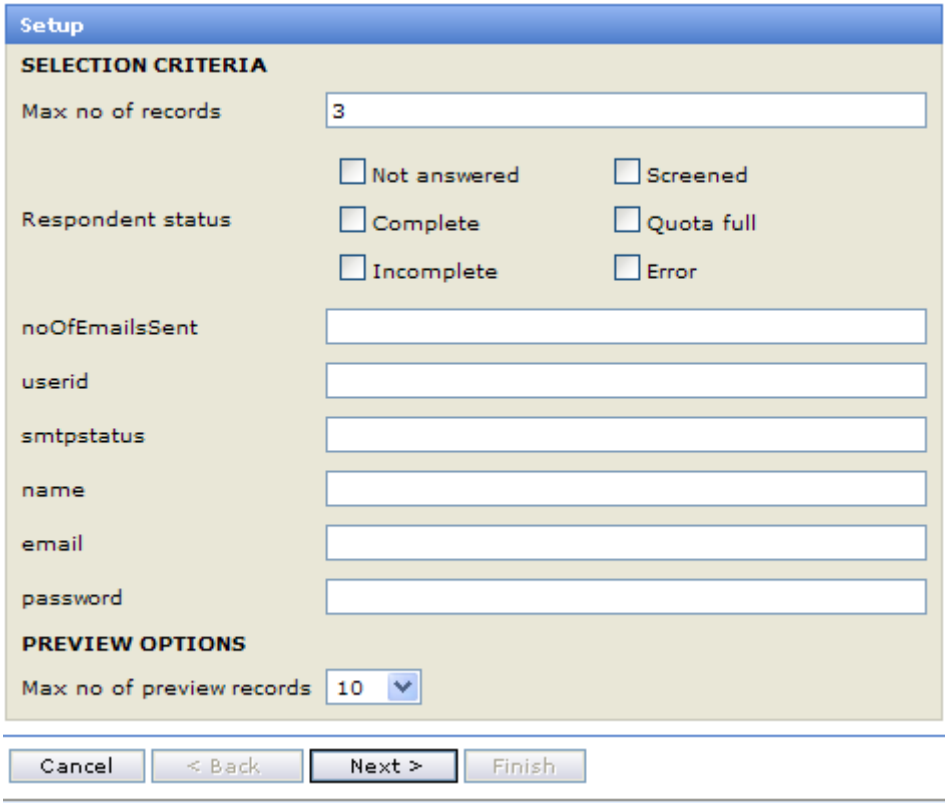


Figure 458 The Selection Criteria page

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.*

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.

15.4.1.1. 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.

- You set Max number of records to 10,000
- You set NumberOfEmailsSent to =0
- You set this task to recurr every hour.

The result:
Iteration 1 - Search will find 50,000 people, but send only to the TOP 10,000 people.
Iteration 2 - Search will find 40,000 people, but send only to the TOP 10,000 people.
Iteration 3 - Search will find 30,000 people, but send only to the TOP 10,000 people.
Iteration 4 - Search will find 20,000 people, but send only to the TOP 10,000 people.
Iteration 5 - Search will find 10,000 people, and send to the TOP 10,000 people.

- **Respondent status –** Chooses respondents based on the status of the interview, see table below.
  - **No selection –** All respondents will receive the email.
  - **Not answered –** All respondents who have not yet entered the survey.
  - **Complete –** All respondents who have completed the survey. (Useful for sending "Thank you" e-mails).
  - **Incomplete –** All respondents who have started answering the survey, but have not yet completed it.
  - **Screened –** All respondents who have the "Screened" status (go to Stop-objects on page 173 for more information).
  - **Quota full –** All respondents who have been stopped due to a full quota (go to Stop-objects on page 173 for more information)
  - **Error** - All respondents who have been stopped due to an error in the questionnaire.
- **Number of emails sent –** The number of e-mails sent to a respondent is recorded for each respondent, and can be used as a selection criterion.

  Other fields:e.g. "email" – The wizard displays all fields from the respondent list that may be used in selection. Type in criteria as appropriate to select the required respondents.

Note: The noOfEmailsSent column will only show the number of emails sent to the respondents in the 'email' column.

To make the selection abilities as flexible as possible, the selection criteria must be input in the *Structured Query Language (SQL)* syntax known from relational database queries.

Examples:

Assume that the respondent data includes gender as a background variable with precodes '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.

15.4.1.2. Fixed Sender Domain and Email Delivery Report Functionality

Starting with Confirmit 11, 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 (go to Email Delivery Report on page 346 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.

Customers using Confirmit On-Demand environments who have specified their own fixed sender domains, will keep these domains after the upgrade to Confirmit 11.
On-Premise clients must license Premium Emailing 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 EmailDeliveryReport section.

15.4.1.3. 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

```
^secureslink^
```

for secure links

Ensure that **^slink^** and **^secureslink^** are not used as background data. The references **^slink^** and **^secureslink^** 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 ^secureslink^ option.

15.4.1.4. 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.

15.4.2. 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.

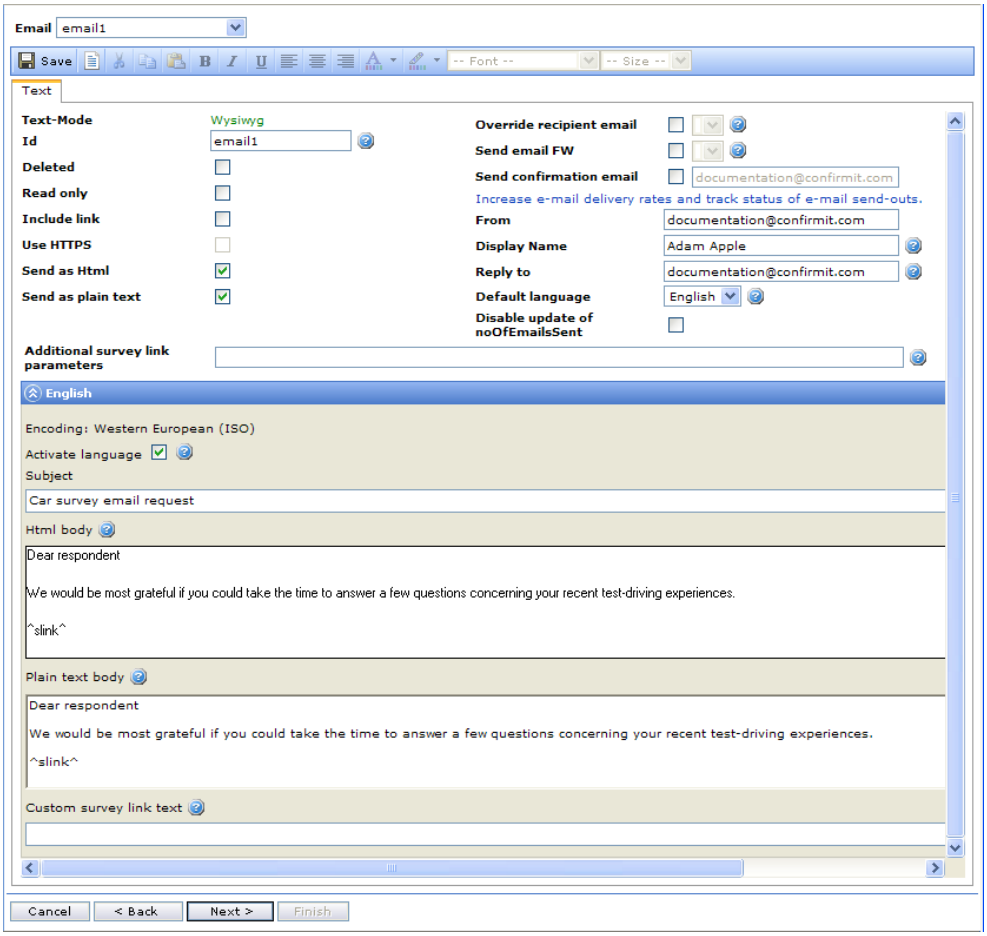


Figure 459 The Create Email page

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.

15.4.2.1. The Create Email 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 emails 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 llink 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 emails to respondents, you can choose to send the emails 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 emails 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 emails 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 (go to Fixed Sender Domain and Email Delivery Report Functionality on page 339 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&co
de=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 emails 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 survey link text** - allows you to insert clickable text instead of the survey URL in HTML emails. Note that this applies only to HTML emails. 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 (go to Handling Respondents in Limited Surveys on page 322 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 emails in the correct languages to the respondents. The system will automatically select the Encoding that has been assigned to a language on the server.

15.4.3. 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.

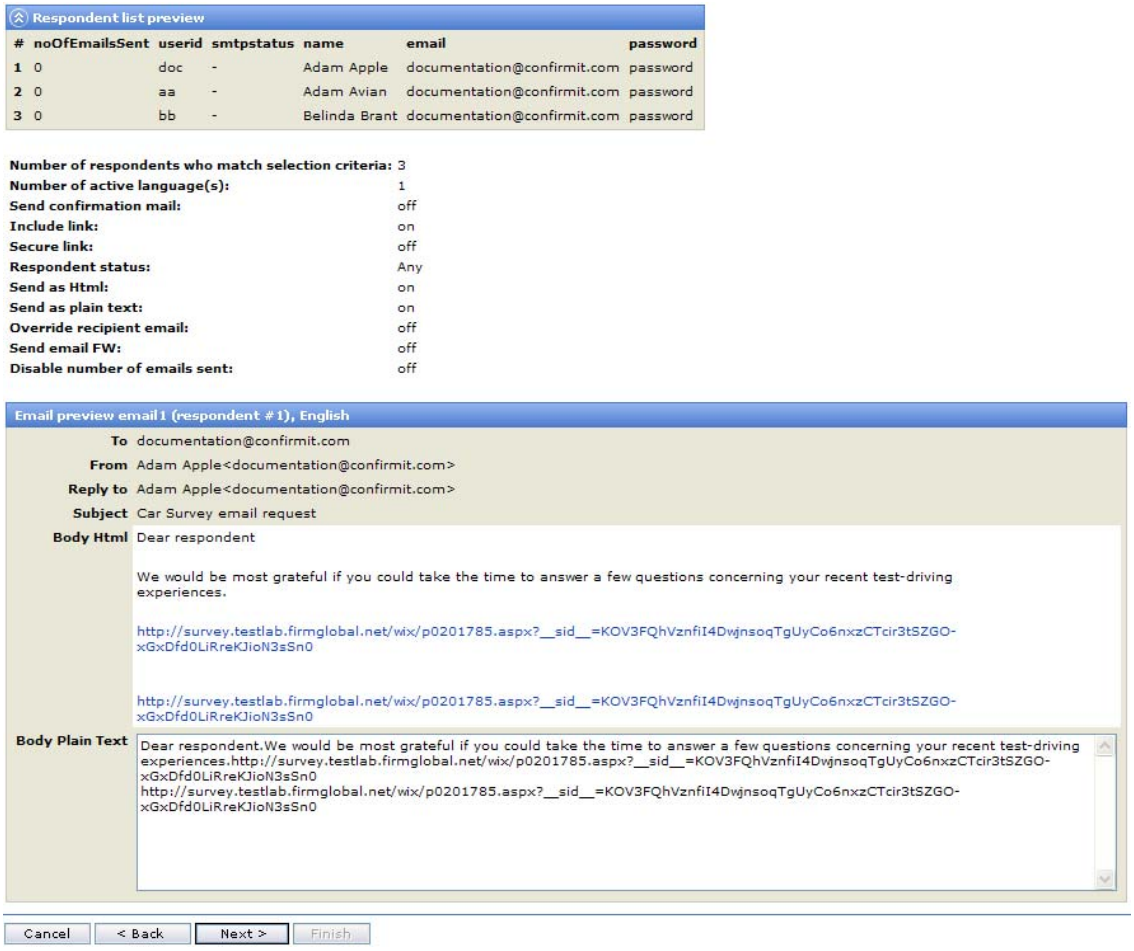


Figure 460 The Respondent and Email Preview page

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.

15.4.4. 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.

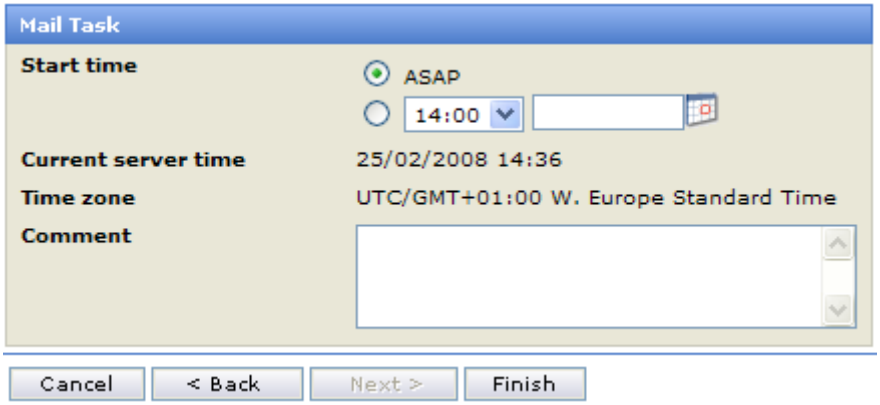


Figure 461 The Mail Task dialog

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.

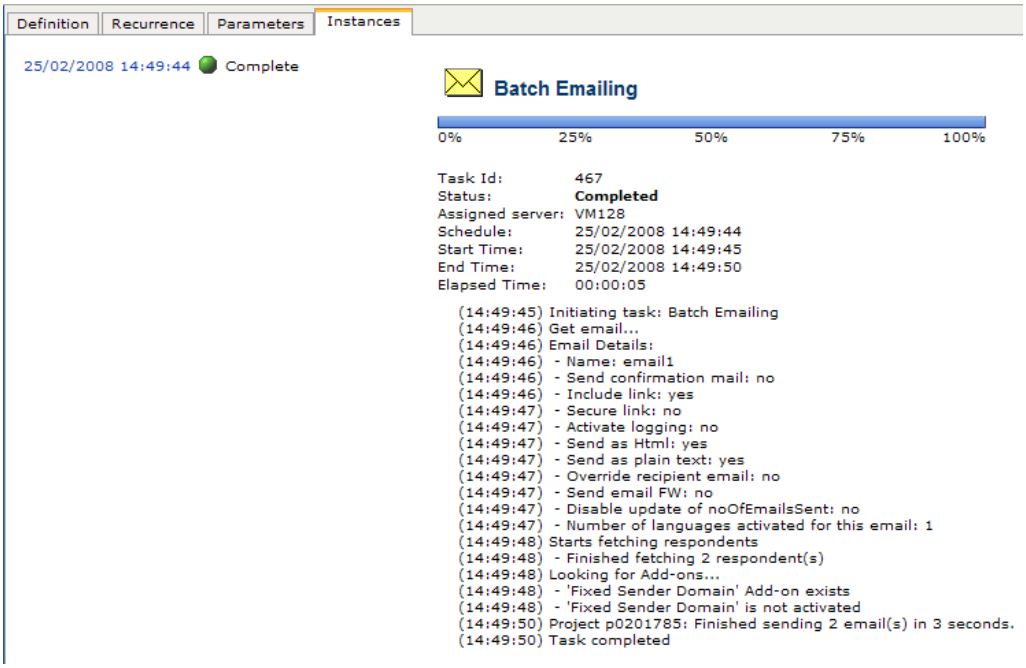


Figure 462 The Batch Emailing task Instances tab

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.

15.4.5. 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**.

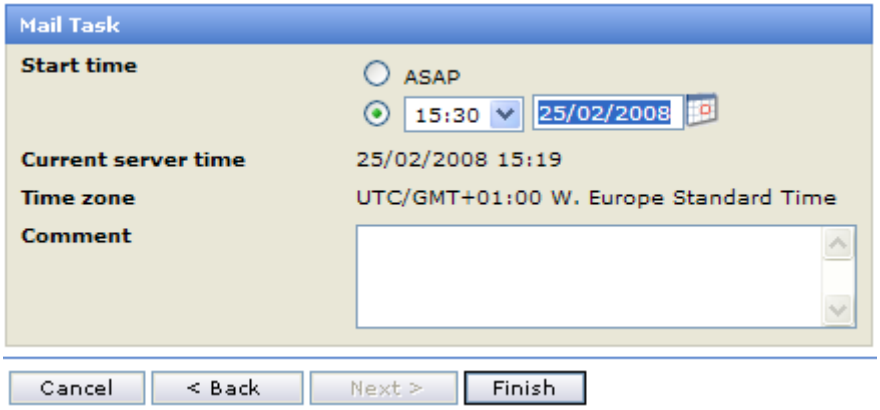
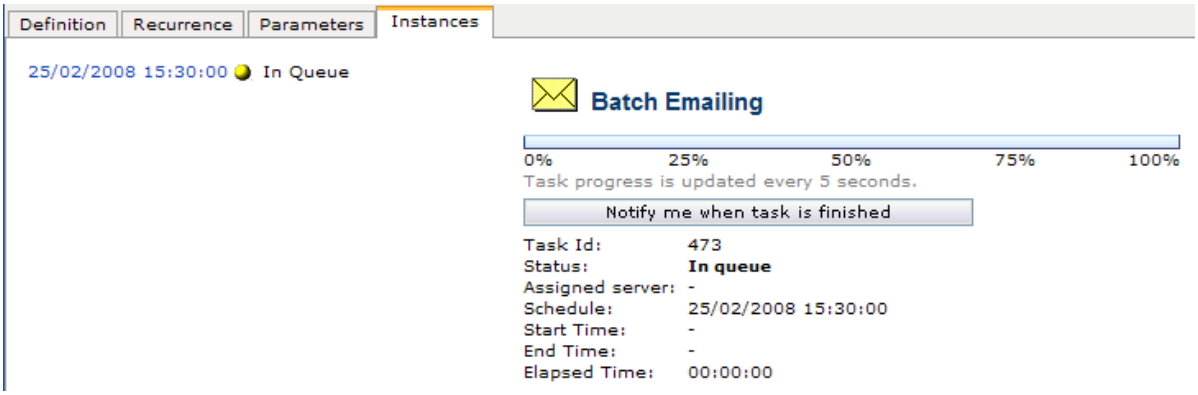


Figure 463 Setting up the recurring Mail task

The Batch Emailing page opens at the Instances tab.



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.

.

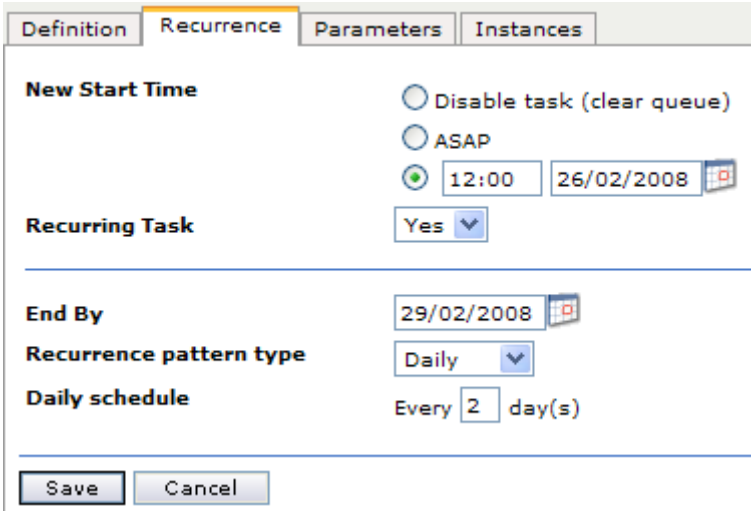


Figure 464 The Recurrence Pattern for the job

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

   The Recurrence tab changes to that shown below.



Figure 465 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.

15.4.6. Email Delivery Report

From Confirmit 11, 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 Premium Emailing to access this functionality. On-Premise clients should contact their Account Manager for further information.

15.4.6.1. 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.

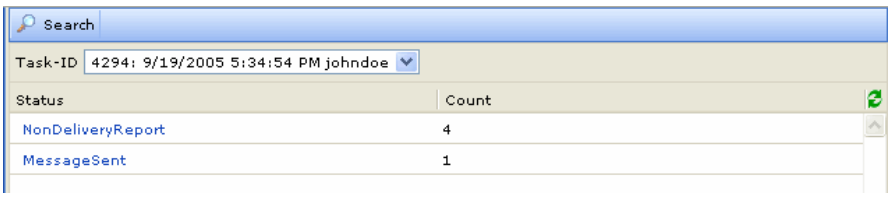


Figure 466 Email Delivery Overview

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:

- **BadMail –** the SMTP server could not send the message because the email address is not valid.
- **Queued –** the email is in the sending server's out-going queue.
- **MessageSent –** the email was delivered successfully to the receiving server. This is no guarantee that the email is 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 until an eventual Non Delivery Report is sent from the receiving server.
- **NonDeliveryReport –** the email was delivered by the sending server, but the receiving server has returned a Non Delivery Report. This can have several causes, for example the email address was not recognized by the receiving server.

2. To display the list of respondents belonging to a particular status, click the status link, or choose **Show Respondents** from the drop-down.

   The Respondent Editor interface opens. Here you can for example change the respondent's email address if this appears to be the reason for the Non Delivery Report, and resend the survey invitation.

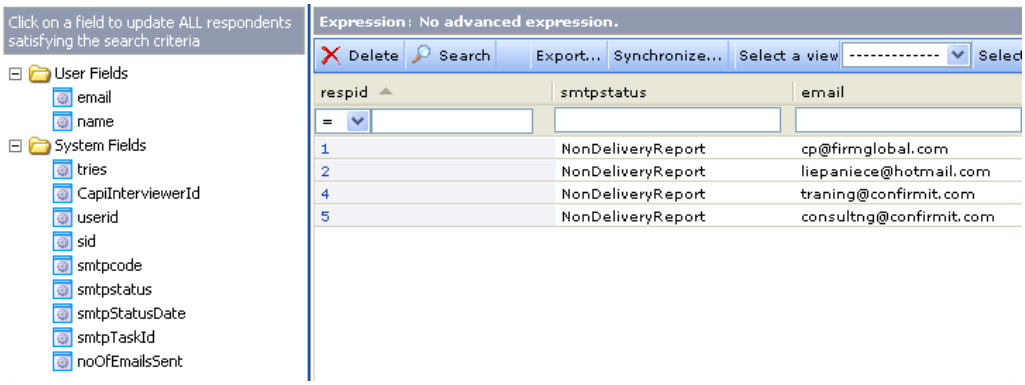


Figure 467 Respondent Editor

See the Respondent Data Editor section for further information.

15.4.6.2. 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.

15.4.6.3. 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 ASP sites that should be used for MX records. To allow for failover should one server be unavailable, it is recommended to add both IP-addresses as the domain MX records with different priorities.

Confirmit US ASP Site	Confirmit Euro ASP Site
IP-address 1 : 72.3.137.170, Priority: 10	IP-address 1 : 83.138.165.68, Priority: 10
IP-address 2 : 72.3.137.171, Priority: 30	IP-address 2 : 212.100.250.11, Priority: 30
IP-address 3 : 72.3.137.172, Priority: 30	IP-address 3 : 83.138.165.69, Priority: 30
IP-address 4 : 72.3.137.175, Priority: 30	

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.

Note: Contact Confirmit Professional Services support@confirmit.com for help with enabling your own sender domain.

15.4.7. 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.

15.4.7.1. 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 ASP are required to abide by any laws and regulations applicable in any country in which they are operating, and with Confirmit's AUP. 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 observe 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.

15.4.7.2. 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 recieve reply mails, you will have to specify a valid email address in the **Reply to** field.

Note that "Out of Office" replies will always be sent to the From address according to the emailing standard.

Note: Even if the Fixed Sender Domain/Email Delivery Report is activated, the Confirmit user can still choose to use another "*From*" (sender) address. In this case a warning will be displayed in Confirmit informing that this may cause the e-mails to be perceived as spam, and that the Email Delivery Report will be incomplete.

15.5. 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.

15.5.1. Open Multilingual Surveys

There are two ways of ensuring that respondents receive the survey in a particular language:

- In open multilingual surveys you may have a Single question with the question ID ***l*** (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 precodes.

  The respondents will be presented with subsequent questions in the language they have chosen in the Language question.

- 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.

15.5.2. 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 (go to Preparing the Respondent List on page 322 for more information). The contents of the column must be Confirmit language codes (go to APPENDIX B: Confirmit LANGUAGE CODES on page 609 for more information).
- Include a Single question with the question ID ***l*** (lower-case letter l) in the survey, as mentioned in the previous section.
- In multilingual surveys with a login-page (go to The Survey Type Options on page 313 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.

15.6. Rule Based Send Outs

Rule Based Send Out functionality, such as Sampling (go to Basic Panels on page 356 for more information), is based on a Rule editor wizard. While the samples in Sampling are extracted from the list of panelists, Rule Based Send Outs are project-based, and the answers provided by the uploaded respondents are used to build the rules.

To make a rule for Rule Based Send Outs, you must first select from your project list a project that you wish to use as the basis for dispatches. This project can be a limited survey, or a survey linked to a panel. You must have sent this survey to the respondents before you create the rule and define the target project. Then:

1. Go to the **Respondents > Rule based send out** menu command.

   The Rule based send out Rule list opens. Note that the first time you go to the list in a project, it will be empty.



Figure 468 An empty Rule List

   If any rules have been defined, they will be listed in the overview.

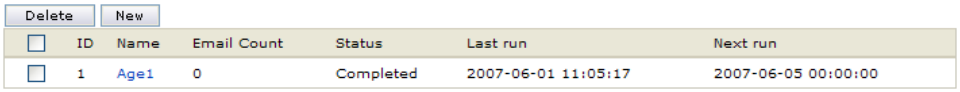


Figure 469 Example of the Rule List with a rule

The fields in the list are as follows:

- **ID** - the rule ID given by the system.
- **Name** - the name of the rule.
- **Email Count** - the number of respondents corresponding with the rule criteria.
- **Status** - whether the task is complete, incomplete, etc.
- **Last run** - specifies when the rule was created.
- **Next run** - the target survey dispatch will normally be a recurring task. The time of the next planned run will be specified here.
- **Delete** - if you want to delete a rule, check the box at the left end of the row and click **Delete**. You will not be able to delete a rule that is being used in an active project.

To create a rule:

1. Click the **New** button.

   The Rule Editor Wizard opens.

2. In the questionnaire tree column to the left of the main window, highlight the question on which the rule is to be based.

   The wizard appears as shown in the example below. Note that you can also use Background variables to create a rule.

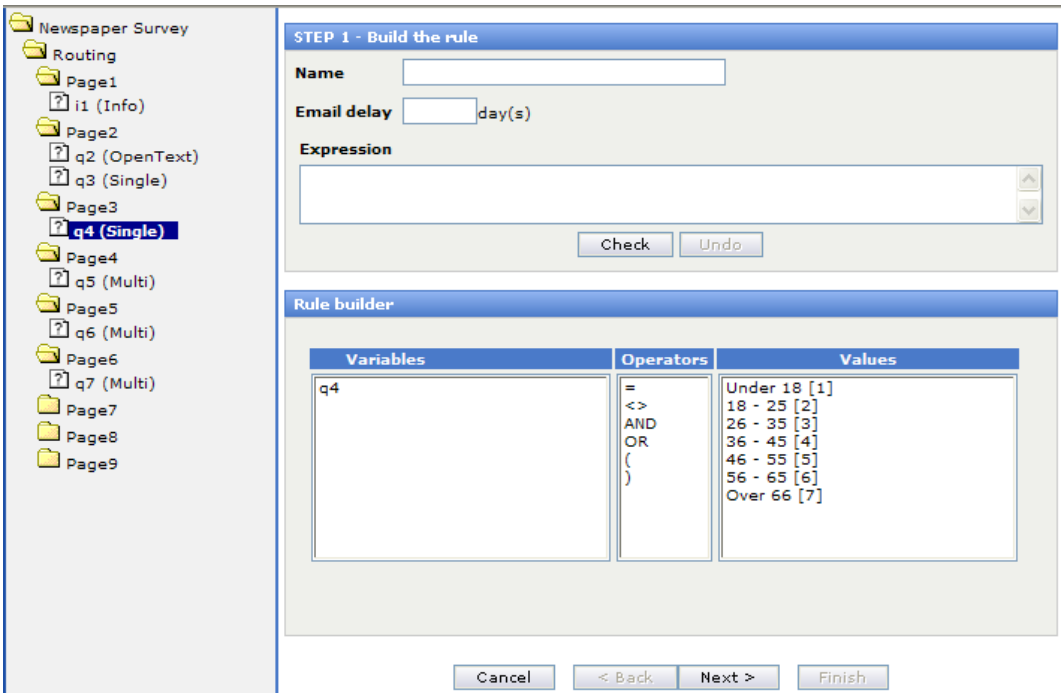


Figure 470 Example of the Rule Editor Wizard for Rule Based Send Outs with a question selected.

The fields are as follows:

- **Name** - the name of the rule.
- **Email delay** - you can delay the email to the respondents by a specified number of days. Type the number of days here. The default is 0 days.
- **Expression** - the field in which the expression is created.
- **Check** - click this button to check whether the expression is correct.
- **Undo** - click this button to undo the last action added to the expression.
- **Variables** - this list shows the question ID of the selected question.
- **Operators** - this list shows the operators and methods you can apply to the form object in focus. The operators will be different for each type of form because the various form-types support different methods. Click on an item in the list to insert the operator or method into the expression field.
- **Values** - this list shows the answers from the selected form, with the precode in square brackets. Click on an item in the list to insert the precode into the expression field.
- **Cancel** - click this button return to the Rule list.
- **Next** - click this button to go to the Email set-up of the Target project.

3. Type in a name for the rule so you can identify it later.
4. Build the expression as follows:
   - Click on the Variable to add it to the expression.
   - Click on an Operator to add it to the expression.
   - Click on the desired Values to move them into the expression.

   The result could look as in the example below.

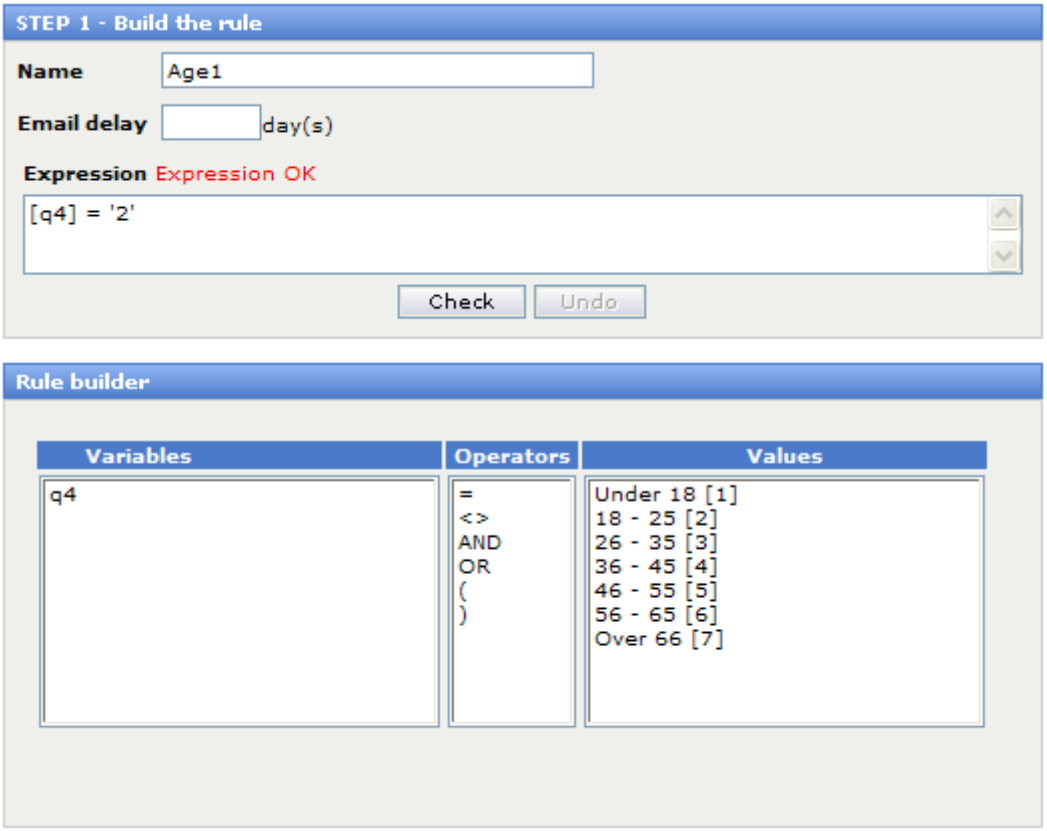


Figure 471 The Rule Editor Wizard with a simple rule

5. When you have finished defining the rule, check whether the expression is correct by clicking the **Check** button.

   If the expression is correct, then the text "Expression OK" will appear above the expression as shown in the figure above.

Note: If there are one or more OR operators in the expression, then the expression must be placed in brackets: for example ([q1]='1' OR [q1]='2').

6. Once the rule is correct, click the **Next** button.

   The Email setup window opens.

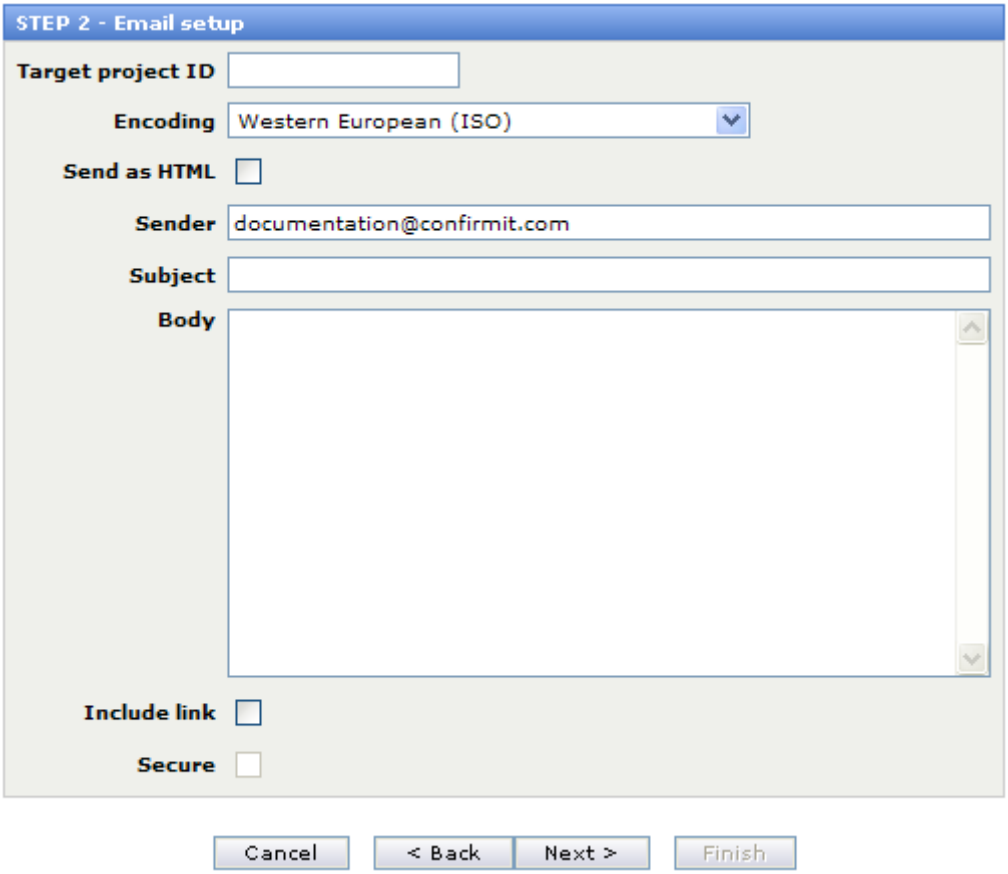


Figure 472 The Email Setup window

The fields and buttons are as follows:

- **Target Project ID** - enter the project ID number of the target project.
- **Encoding** - select the language encoding type.
- **Send as HTML** - Emails may be sent in HTML format. Check the “Send as HTML” box to send HTML coded email invitations. Note that not all mail systems will display such emails correctly. Use with caution. When used, MIME format should also be selected.
- **Sender** - enter the e-mail address that is to appear in the From header field in the e-mail. Bounce-backs and replies will go to this address.
- **Subject** - enter the subject header of the e-mail.
- **Body** - enter the text that is to appear in the body of the e-mail message.
- **Include link** - select this checkbox to automatically add a link (URL) to the web interview at the bottom of the email (default).
- **Secure** - when this box is checked, 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.
- **Cancel** - click this button to return to the Rule list.
- **Back** - click this button to return to the Rule Editor Wizard.
- **Next** - click this button to go to the Schedule set-up, where you also can preview the email message.

7. When you have specified all the details in the Email set-up, click **Next**.

   The Schedule set-up and Email Preview page opens as shown in the example below.

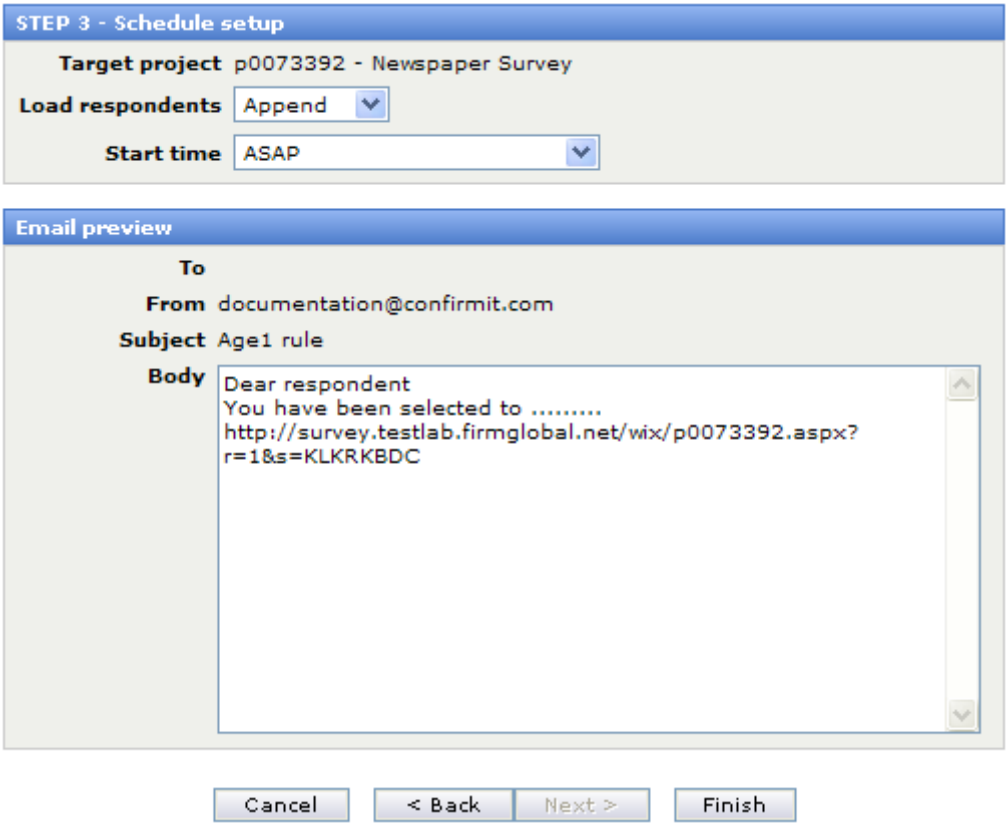


Figure 473 Example of the Schedule Setup and Email Preview window

In this window you specify whether you want to Append the new respondents to the existing respondent list, if any, or Overwrite the respondents in the database with the new respondents, when the rule based mails are sent out. Use the Start time drop-down to specify whether you want this job to start ASAP or schedule it for later execution.

8. Once you have made the appropriate settings and checked the content of the email, click the **Finish** button.

   The Task Settings window opens. Here you define the Recurrence pattern of the job. As the respondents will be participating in the original survey at different times, you are recommended to define the Rule based send outs as Recurrent tasks.

Note: To make sure that your respondents do not receive multiple emails, you must perform the following steps after the first batch of emails is sent:

1. Go to **Home > Tasks > Search**.
2. Enter your original project ID to search for the batch-emailing task.
3. Once you find the Batch Emailing task, click on its ID.

   The Task Instance Properties window opens.
4. Click the **Task Definition** button at the bottom of the page.

   The Task Definition Properties window opens.
5. Click on the **Parameters** tab.
6. Here, in the *Selection Criteria* in *noOfEmailsSent*, type in: **='0'**
7. Click **Save**.

If you need to change or confirm the recurrence pattern, go to the **Recurr** tab and click **Change**, make the required changes and save them.

Note: Even though the link appearing in the Email Preview might include the original project ID instead of the target project's ID, respondents fulfilling the rule requirements will receive links to the target project. Also, note that email addresses from the original survey will be passed into the target survey automatically.

16. Basic Panels

Note: For some customers, the Basic Panel functionality is a chargeable Add-On.

Warning
From the Confirmit 11 release, panelist portals running on Java are no longer supported. This only applies to panels using the old login interface for panelists (set up under Templates->Panel), and this is only relevant for panels that have not been re-launched after Confirmit was upgraded to version 10. This does not apply for Community Portals. The only action needed to update old Java portals is to re-launch the panel survey. A re-launch will automatically remove the Java dependency. The Panel Survey does not need to be changed in any way, and no functionality will be lost. If the panel survey has been re-launched after Confirmit was upgraded to version 10, this has already been done. Java-based portals that have not been re-launched will cease to function in Confirmit 11/12, so if the panel is live it must be re-launched before the upgrade to avoid problems.

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
- Recruiting panelists for a panel
- Management of panelists within a panel
- Panelist web page template editor
- Sampling functionality
- Uploading of panelists to surveys

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.

16.1. 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.

16.2. 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 Panel Name window opens.

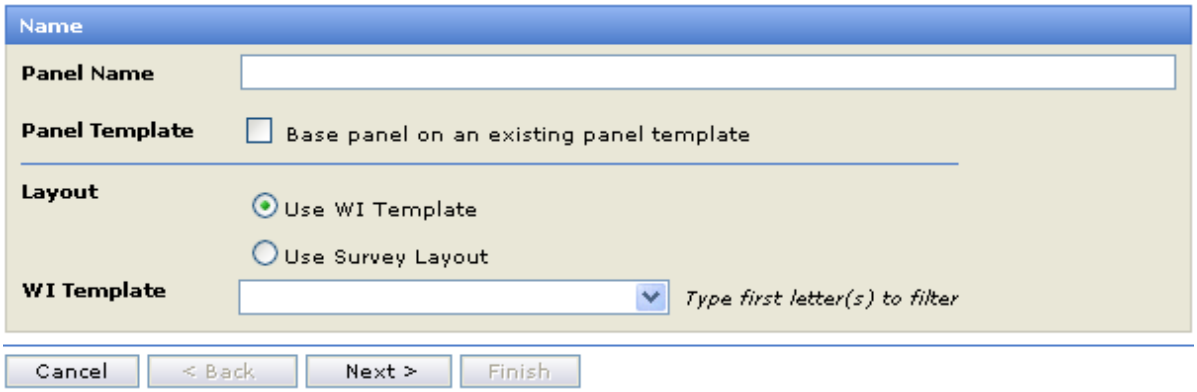


Figure 474 The Panel Name window

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 whether you wish to use a WI template or a survey layout.
   - o If you select to base the panel on a template, then when you click **Next** the panel will be created from the template.
   - o If you select to use a survey layout, then you must select the layout to be used.
   - o If you have not selected to create the panel from a template, then when you click **Next**, the Select Language window opens. In this case, select the languages that are to be used in this panel, then click **Finish**.

   The Panel Overview window opens with the details of the new panel.

16.3. 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.

16.4. Creating a New Panel Project

When you create a new Panel, the **Panel Management > Overview** window opens at the **General** tab (go to Project Management on page 132 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 > Professional Designer** menu command.

  The questionnaire builder toolboxes will be displayed with the default questionnaire for panels in the Questionnaire Tree.

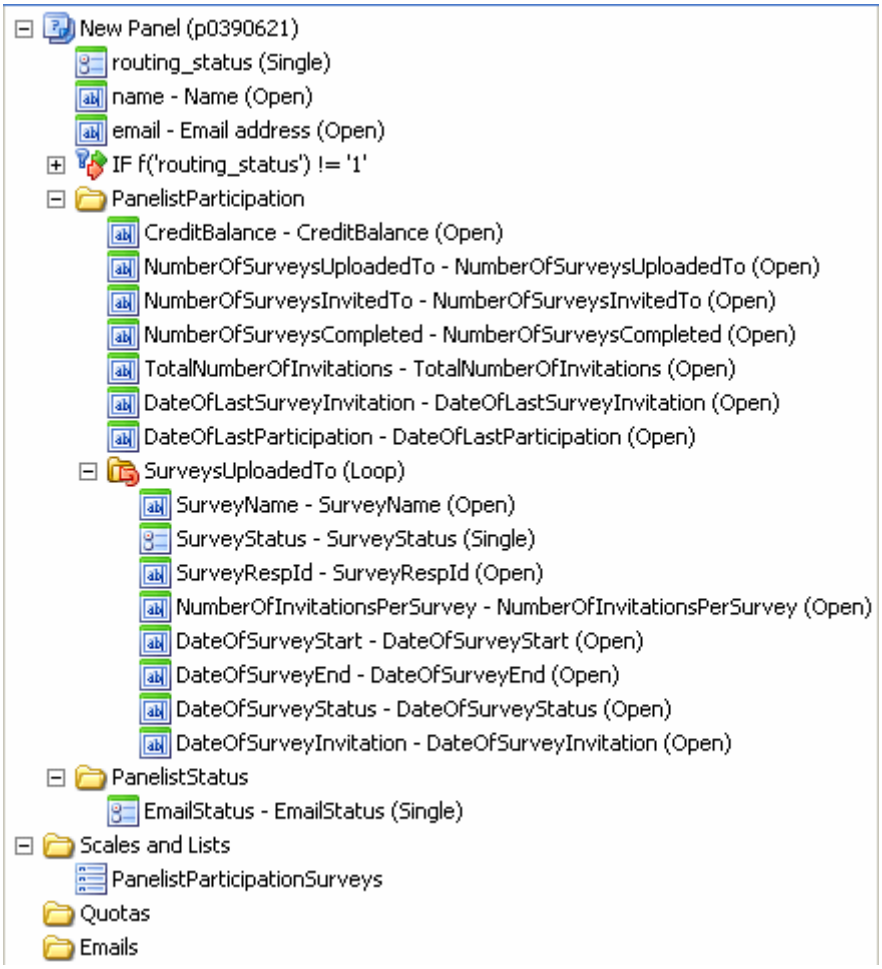


Figure 475 The default Panel questionnaire

You cannot remove the default objects from the tree, but as project manager you may customize the objects and add new questions as required.

16.4.1. 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 las set for the panelist on the project.
DateOfSurveyInvitation	The date and time the last email invitation was sent to the panelist on the project.

16.4.2. The PanelistStatus Folder

The PanelistStatus folder contains the variable EmailStatus that will hold the Email Delivery Status (go to Email Delivery Report on page 346 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.

16.5. Launch 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 (go to Preparing for Data Collection on page 302 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 (go to Preparing for Data Collection on page 302 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 (go to Panelist Web Page Templates on page 360 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).

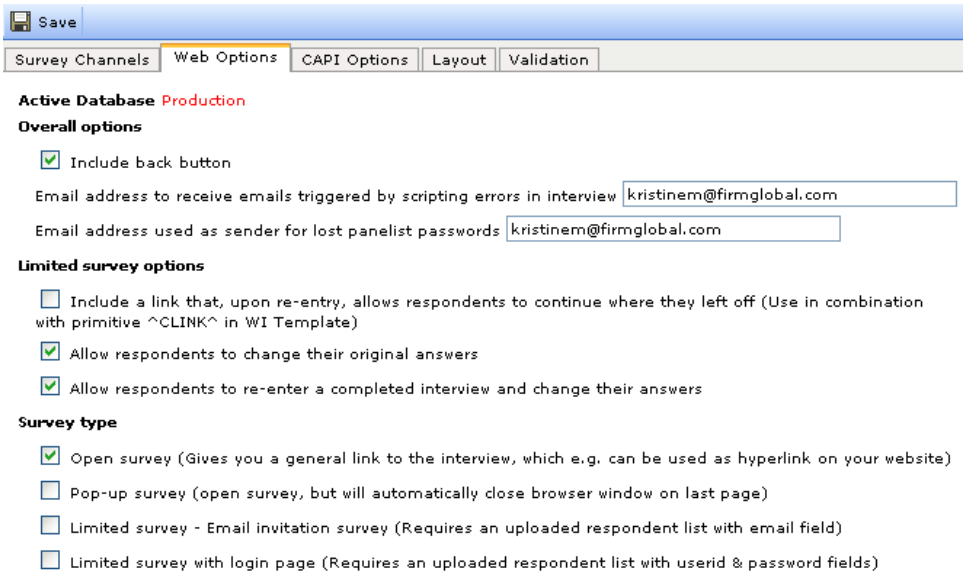


Figure 476 Survey Settings for Panels

16.6. 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.

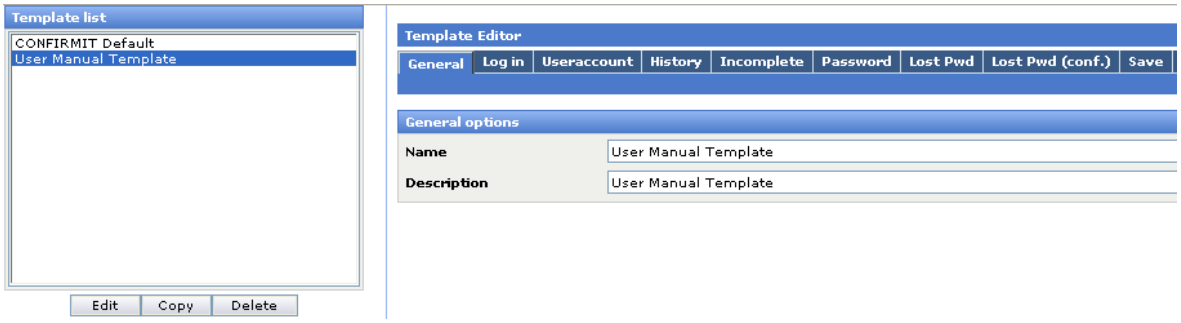


Figure 477 Example of the Panel Template Editor

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 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:

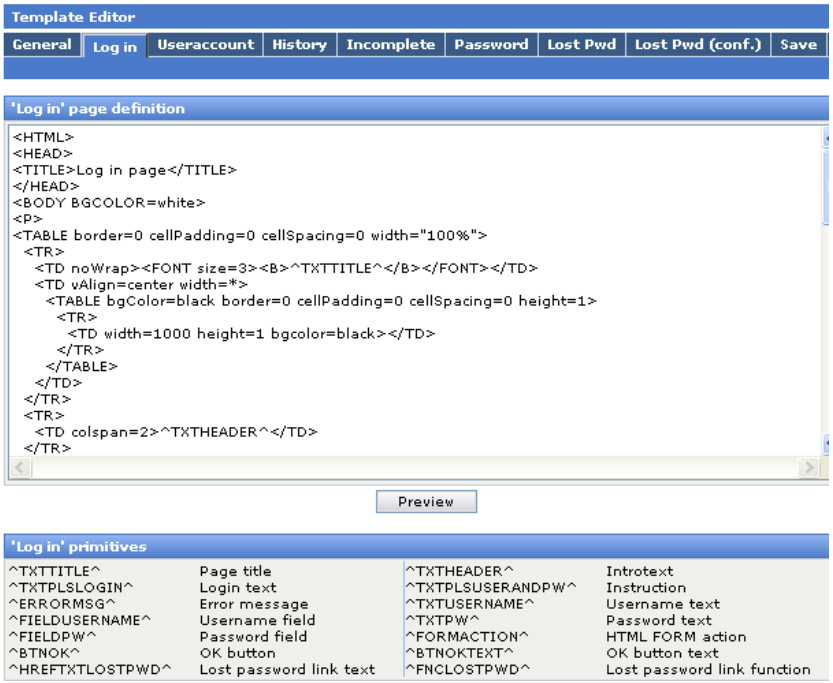


Figure 478 Login Page Template Editor

The remaining Template Editor tabs have a similar layout. Edit the template in HTML, and click **Preview** to see a preview of the page.

16.6.1. 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.



Figure 479 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.

16.6.2. 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:

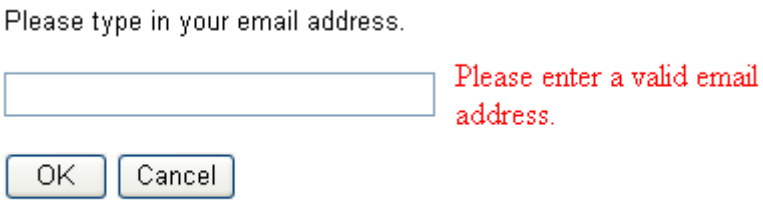


Figure 480 Example of a Panelist email address pop-up

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" (go to Survey Settings on page 310 for more information).

16.7. 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.

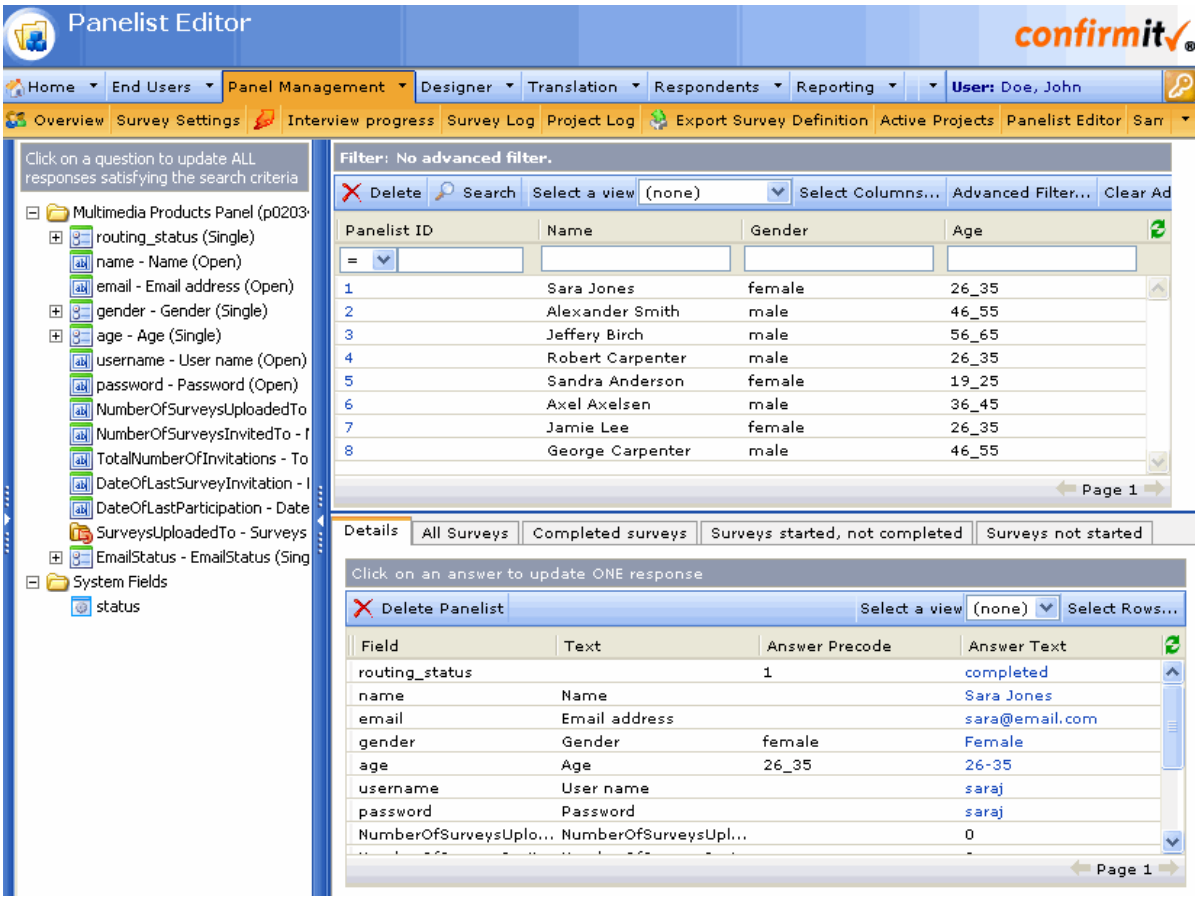


Figure 481 Example of the Panelist Editor window

The Panelist Editor's search and edit functionality is the same as that of the Survey Data Editor (go to Edit Survey Data on page 522 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.

16.8. Sampling Functionality

The Sampling functionality allows you to define several samples within the same panel, and send out different surveys to different samples as required.

16.8.1. How to Define a Sample

To create a sample:

1. Go to the **Panel Management > Sampling** menu command.

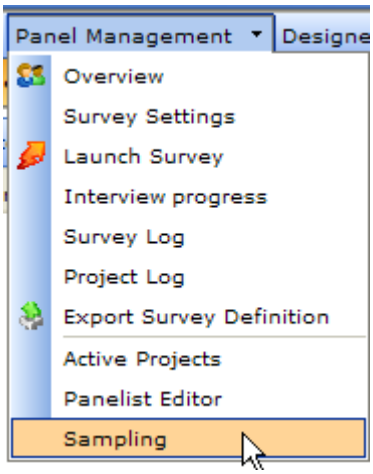


Figure 482 The Panel Management Menu

The Sample List page opens. This page lists all the samples for the current panel.

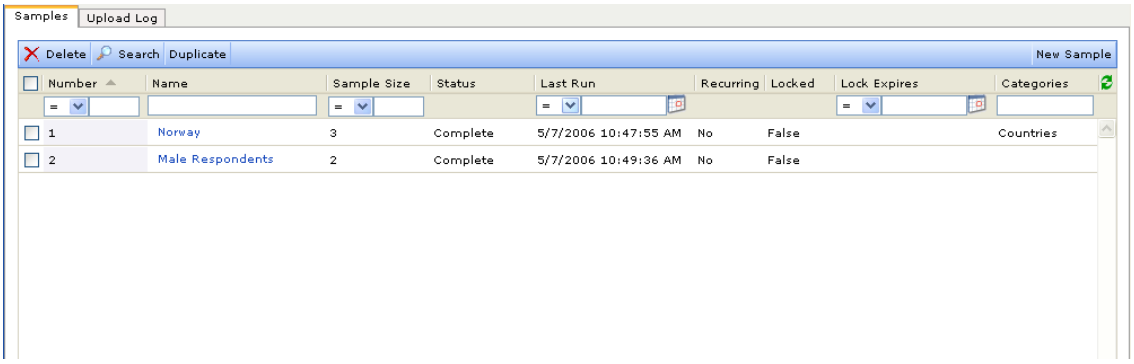


Figure 483 Example of a Sample List page

2. Click the **NewSample** button in the upper right corner of the list.

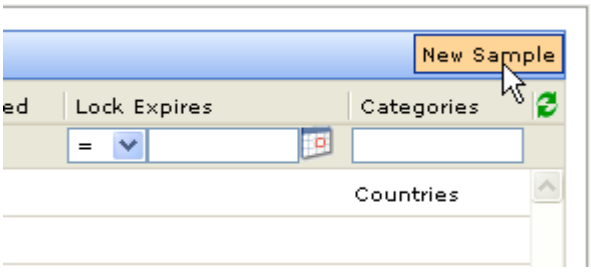


Figure 484 Creating a new sample

This opens the sample details page. Here you can define a name for the sample, run the sampling, schedule it and lock it.

You can also define sample categories. Several samples can belong to one category, for example, in our example, the category is called “Male Panelists”. When extracting samples for, for example, other age groups for male panelists, you can specify the same category for these. Categorization makes organization of samples easier in the sample list.

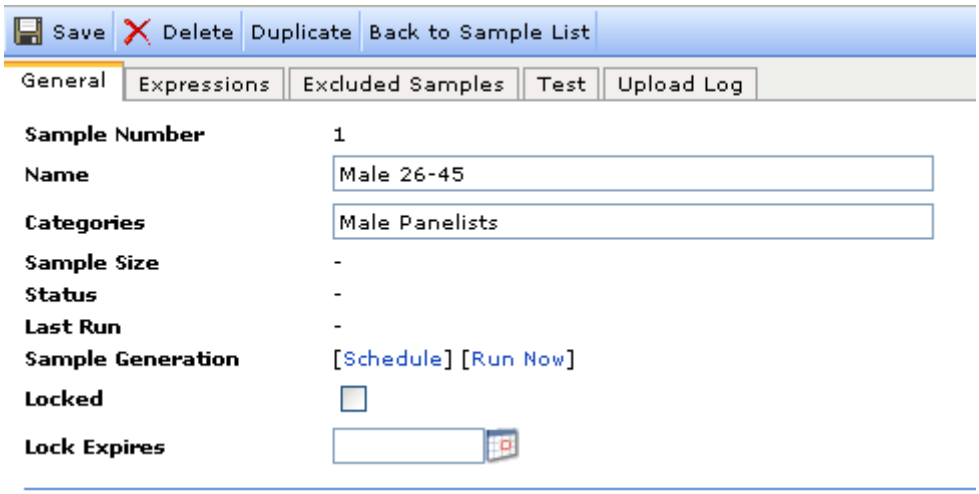


Figure 485 Sample Definition

16.8.2. How to Lock a Sample

You can lock the sample so the panelists in the sample cannot be used for any other samples until the lock expiry date or until you manually remove the lock. To lock the sample:

1. On the **General** tab, check the **Locked** box.
2. In the Lock Expires field, type in or select the desired expiry date for the lock.

   Once the sample lock expires, those members of the sample will then be available to be included in other samples.
3. Save the changes.

16.8.3. Expressions

Under the Expressions tab you can define one or more expression 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.

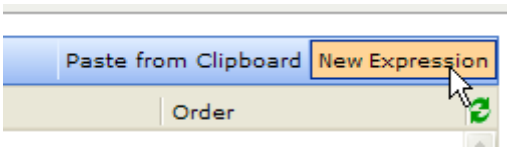


Figure 486 Creating a new Expression

The Expression Builder window opens.

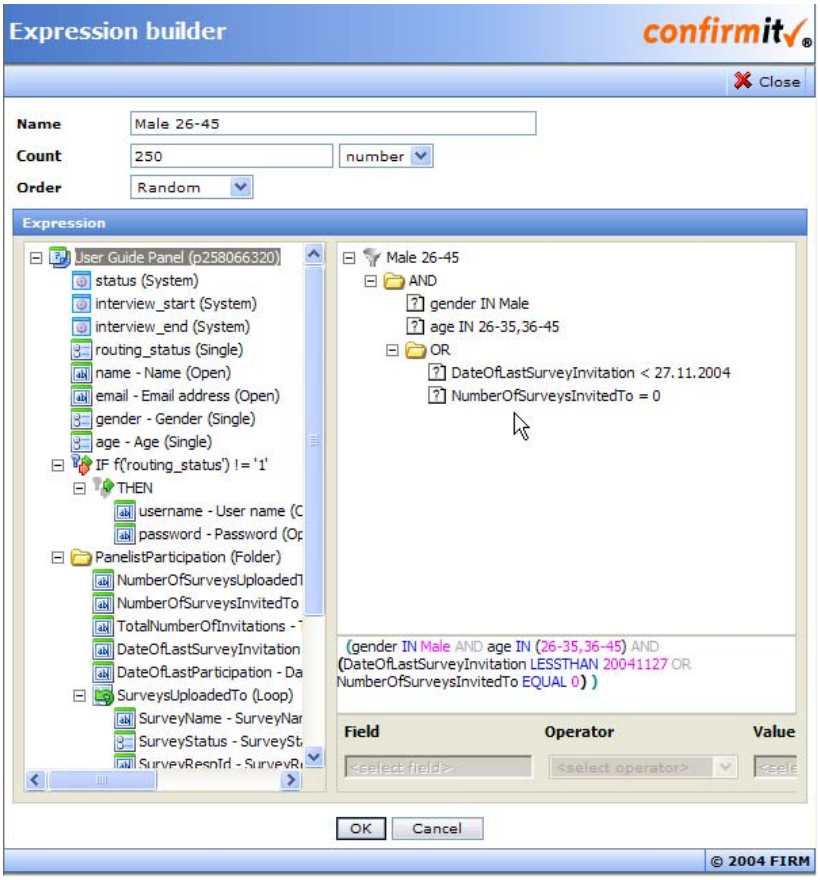


Figure 487 Example of the Expression Builder

- **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. You can choose between selecting these randomly and selecting the first (ascending) or last (descending) panelists matching the expression.

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.

2. In the tree to the left, highlight the question you want to use for the sample building.

   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 (go to The Advanced Filter Designer on page 400 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.

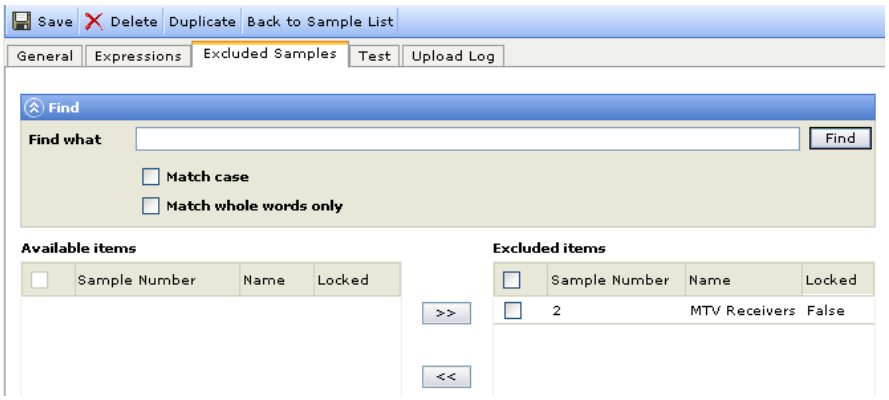


Figure 488 Excluding samples

If you want an estimate of the number of panelists that would result from running the sampling on the panel, go to the Test tab and click the **Test sample** button. This will return an estimated count. You may choose to ignore any locked samples when performing this test.

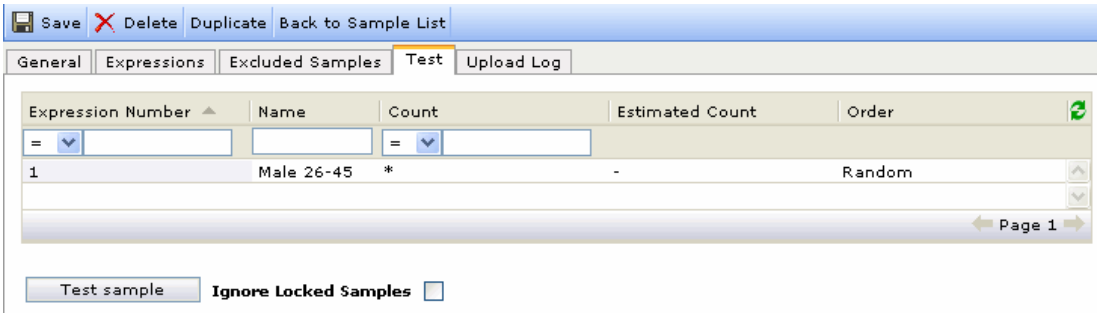


Figure 489 The Test tab

Click on the Upload Log tab to track which projects the sample has been uploaded to and when it was uploaded.

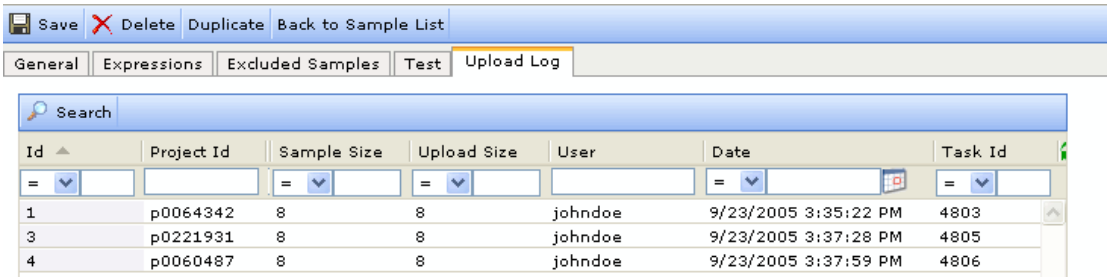


Figure 490 Example of the Upload Log

If you wish to copy an expression used in one sample definition into another sample definition, go to the Expressions tab, select the expression and click **Copy to Clipboard**.

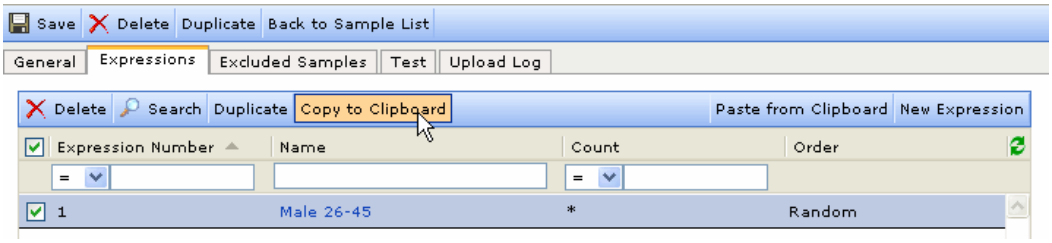


Figure 491 Copying an expression to the clipboard

You can then go back to the sample list, choose the other sample (or create new) and under Expressions for that sample, click Paste from Clipboard to insert the expression.

16.9. Uploading Samples to Projects

If you wish to retrieve values of panel variables and use them in a survey so you can use them for example in conditions or in reporting, set **Variable type** in the question properties to **Panel variable**. The question must have the same question id as in the panel. This will work 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.

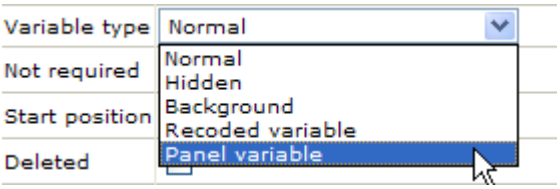


Figure 492 Adding a Panel Variable to the Survey

The surveys 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 (go to Panelist Login Pages on page 370 for more information).

To upload a sample:

1. Go to the **Respondents > Sample Upload** menu command.
2. Select by clicking on it the panel with the sample you want to upload.

   All the samples in the current panel will be displayed in the bottom frame.
3. Highlight the sample you want to upload to the survey.
4. Click **Upload**.

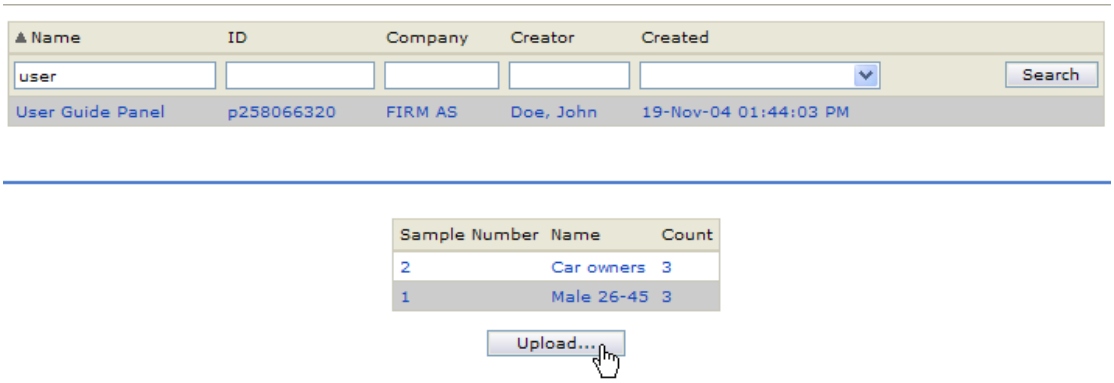


Figure 493 Uploading the sample - 1

The same choices as when uploading respondent lists will then appear (go to Uploading the Respondent List on page 323 for more information).

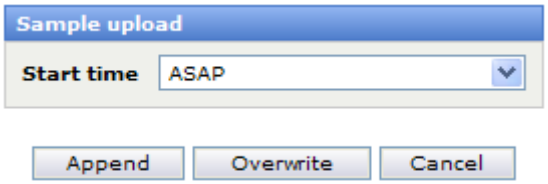


Figure 494 Uploading the sample - 2

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 (go to Panelist Login Pages on page 370 for more information)

16.10. Survey Overview in a Panel

The Project Manager can view all the projects linked to a panel. To do this, select a panel and go to the **Panel Management > Active projects**menu command.

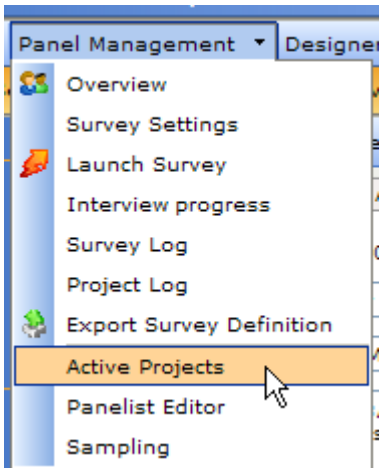


Figure 495 Select Active Projects

The Active Projects list appears. This screen lists all projects that panelists from this panel have been uploaded to. You may search through the list. 50 projects per page will be displayed. Click on a project to enter it.



Figure 496 Example of an Active Projects list

16.11. 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

UK 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/pXXXXX/login.asp. Where pXXXXXX is the project ID number of the panel.

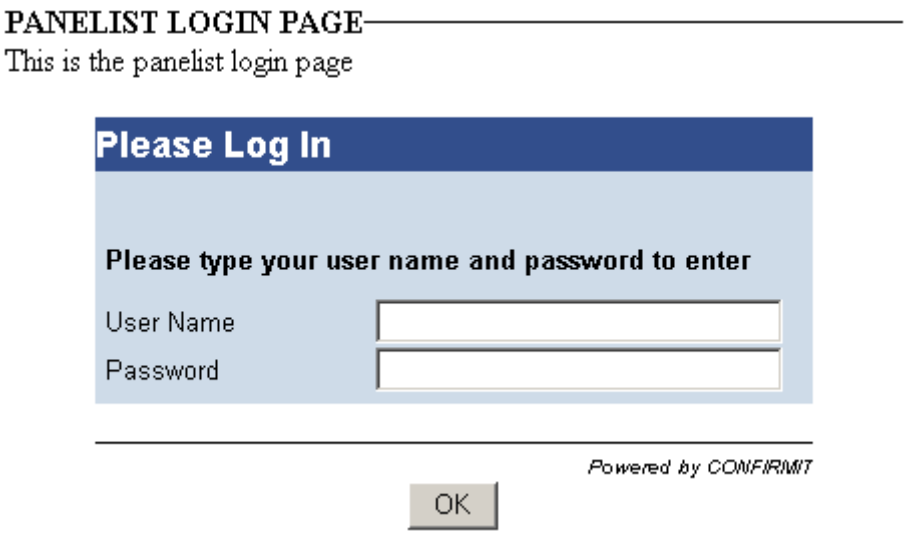


Figure 497 Example of a panelist Login page

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.

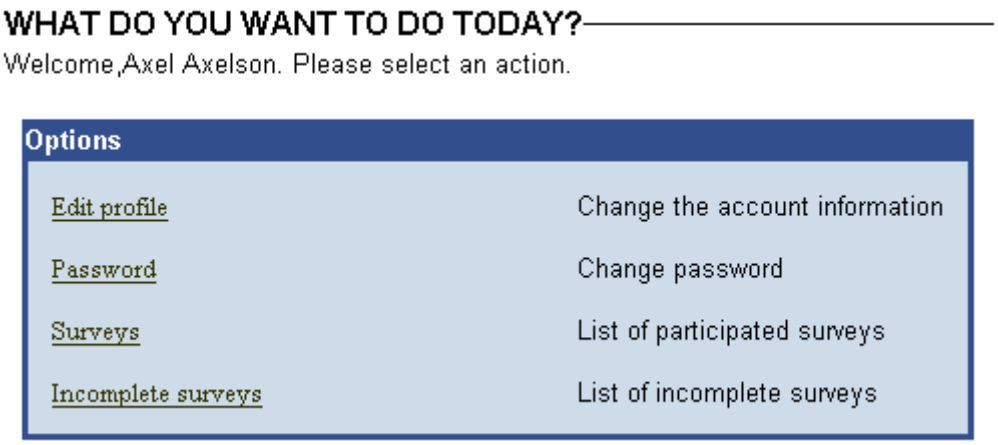


Figure 498 The panelist's options

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.



Figure 499 Example of the Edit Profile page

When the panelist clicks the **Change password** link, the page shown below opens.

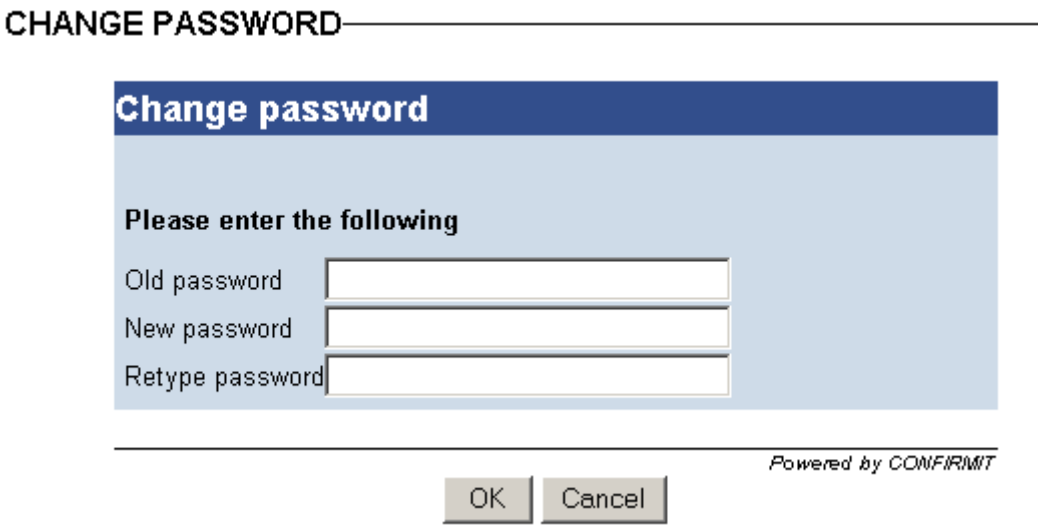


Figure 500 Example of the Change Password page

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.

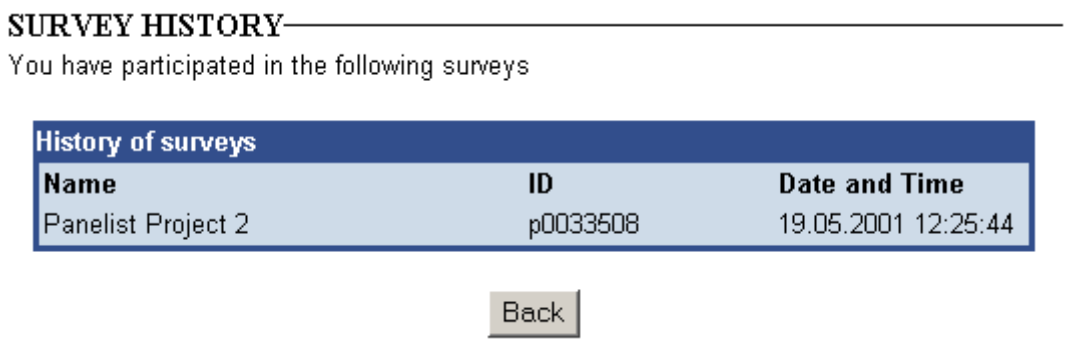


Figure 501 Example of the Survey History page

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.

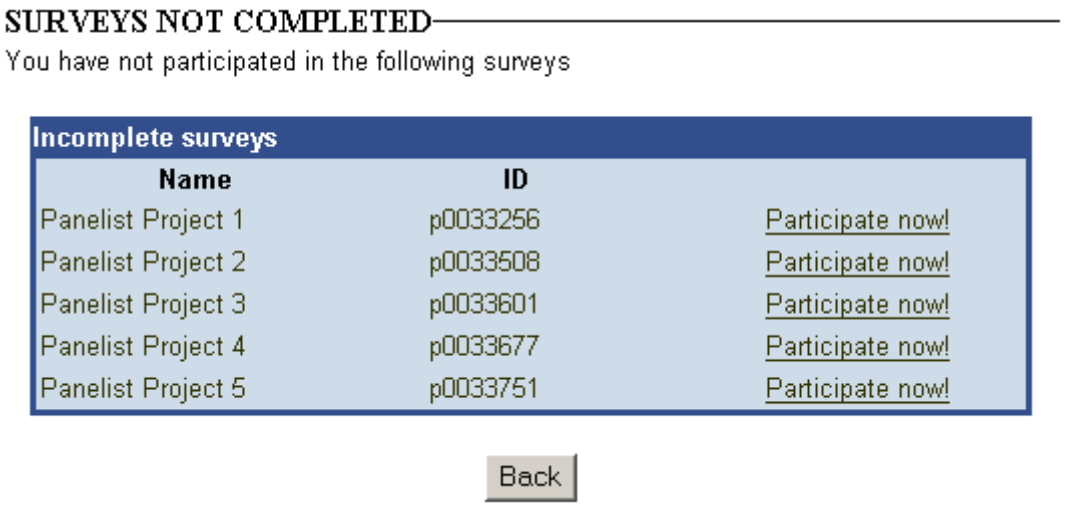


Figure 502 Example of the Surveys Not Completed page

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. Online Coding Tool

Note: For some customers, the Online Coding Tool is a chargeable Add-On.

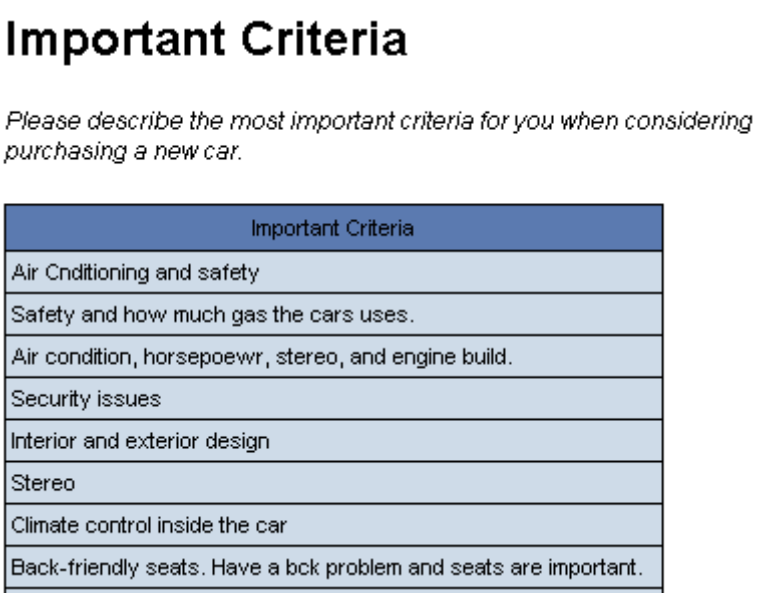
Note: This functionality will be available for projects using the Optimized database format, with the following limitations.
1) Multi questions using the loop referencing functionality in the answer list are not supported.
2) Only filters based on Interview Status can be used.

17.1. Why Have a Coding System?

The coding system is a tool for coding open-ended questions such that the answers given by the respondents can be given precodes and code frames.

This system has been designed to enable coders to classify open-ended or ”open-text” questions into categories, thereby allowing reports to be constructed from these questions in the same way as for single and multi questions. Open ended or “open text” questions (forms) are here defined as *Open* questions, *Multi* questions with “open-text” checked off in *Properties*, and 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-end 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-end 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-ended 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 503 Example of respondent answers for the open-ended question before coding

Important Critera

Which are the most important criteria for you when considering purchasing a new car?

	Important Critera					
	Pos		Neg		*Total*	
Comfort	4	20.0%	16	80.0%	20	100.0%
Engine	3	15.0%	17	85.0%	20	100.0%
Stereo	2	10.0%	18	90.0%	20	100.0%
AC	2	10.0%	18	90.0%	20	100.0%
4WD	1	5.0%	19	95.0%	20	100.0%
Safety	9	45.0%	11	55.0%	20	100.0%
Other	8	40.0%	12	60.0%	20	100.0%

Figure 504 A Sample example

The sample table was produced in reporting, using the re-coded open-end 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.

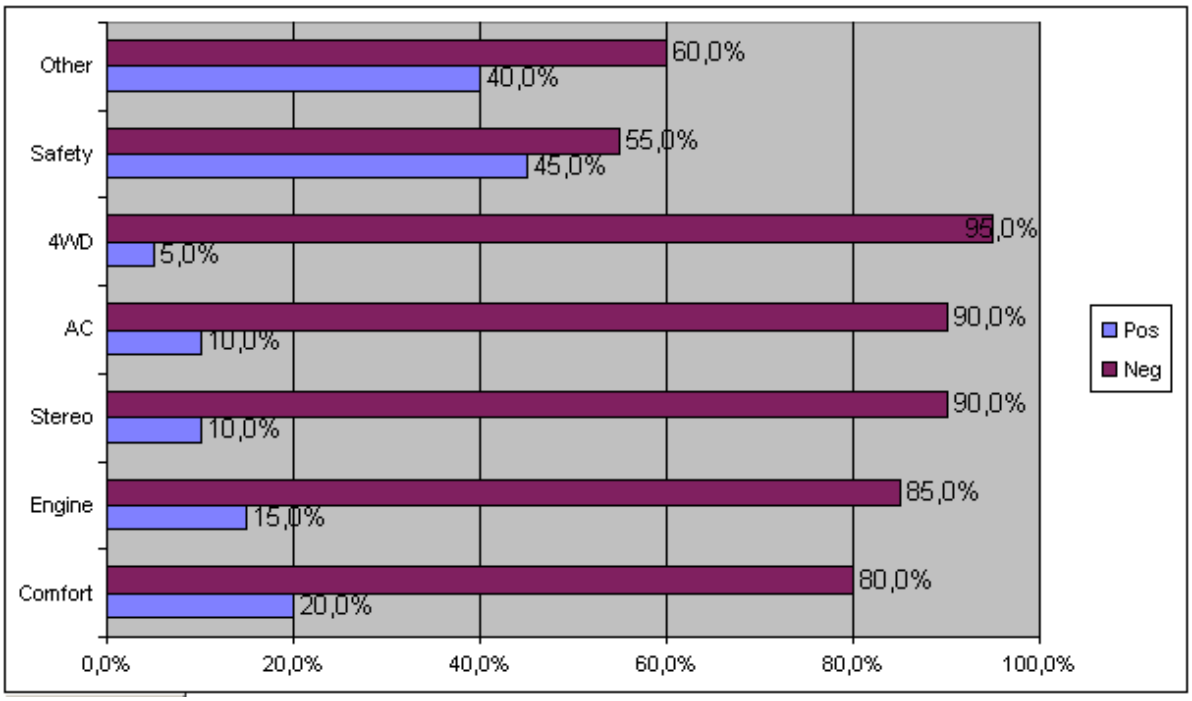


Figure 505 This Chart was produced using open-ended text answers after the online coding was complete

17.2. Specification Summary

The main features of the coding system are:

- For each open-ended question, a multi question is required in order to define the available codes for the question. Specifying the corresponding open-ended question in the properties for the multi question links these two questions (go to Entering Online Coding on page 376 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 (go to Locking the Questions for Coding on page 379 for more information).
- The main window of the coding system is the Coding Window where the coders can define a working set of answers for a chosen open-ended question, code each answer, and navigate through the working set of answers (go to Coding Window on page 381 for more information).

17.3. 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 > Online Coding** menu command.

   The Online Coding Tool window opens.

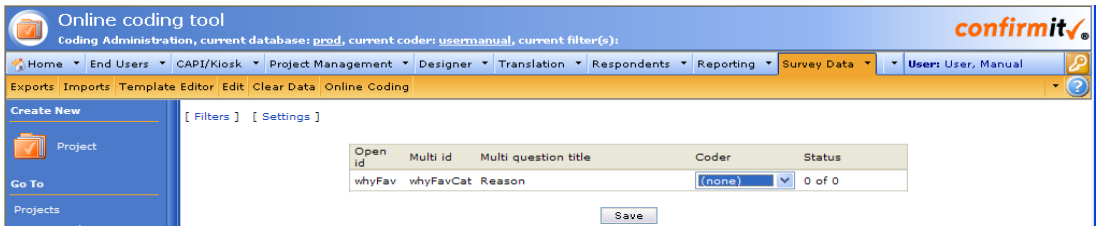


Figure 506 The Online Coding Tool window

17.3.1. User Settings

To access the Online Coding specific user settings:

1. Go to the **Home > User Settings** menu command.

   The User Settings window opens.

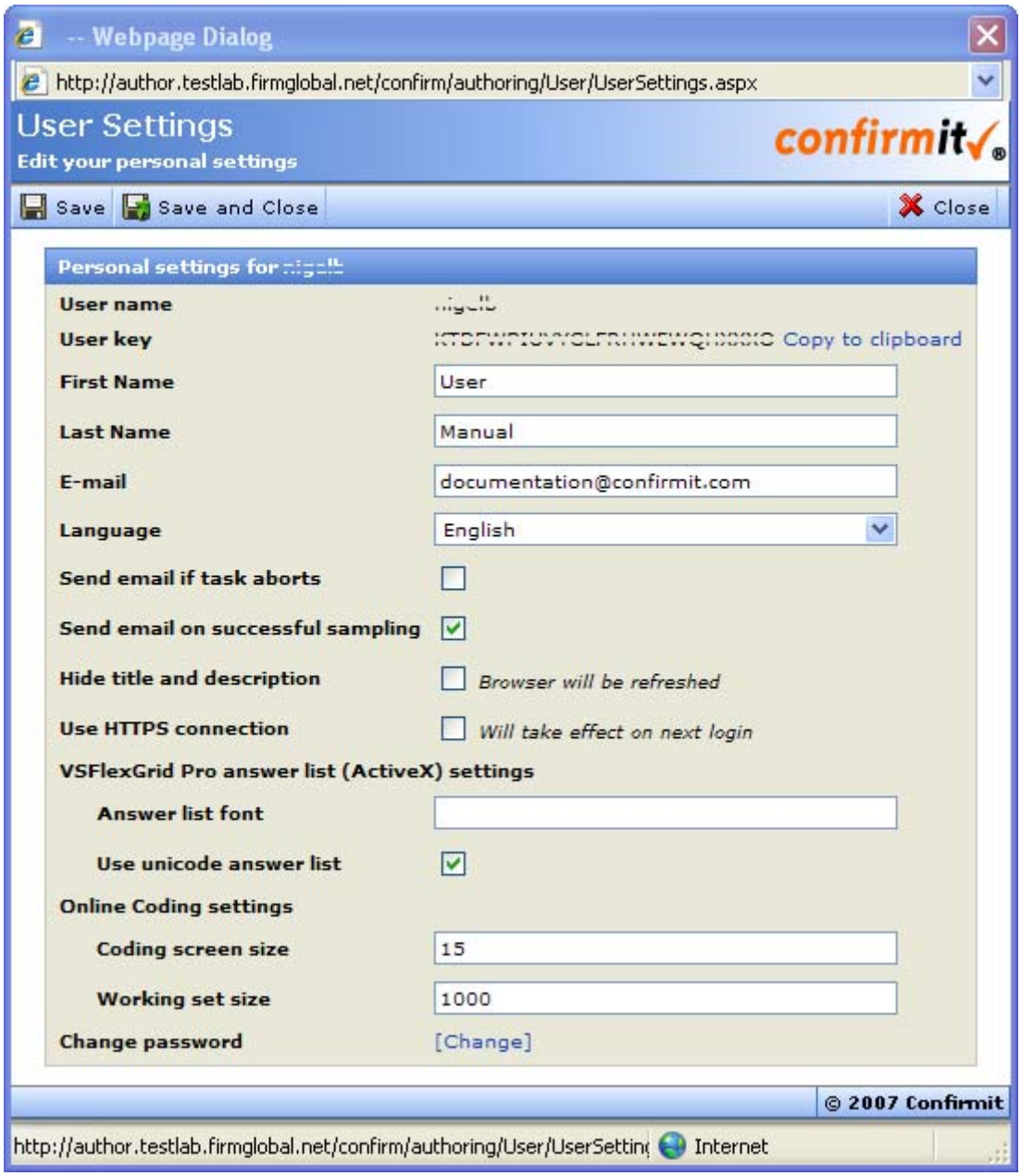


Figure 507 The User Settings window

The two settings that are relevant for the Online Coding functionality are 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 10 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**.
- **Working set size -** This is the maximum number of answers for a given working set. The size will be set to 1000 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**.

17.3.2. Object Permissions

The project administrator must define who will have permission to code the open-ended questions. This is set up in the Permissions window.

1. Open the required project.
2. Go to the **Project Management > Overview** menu command.

3. Click the **Permissions** tab.

   The list of registered users is displayed. 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.

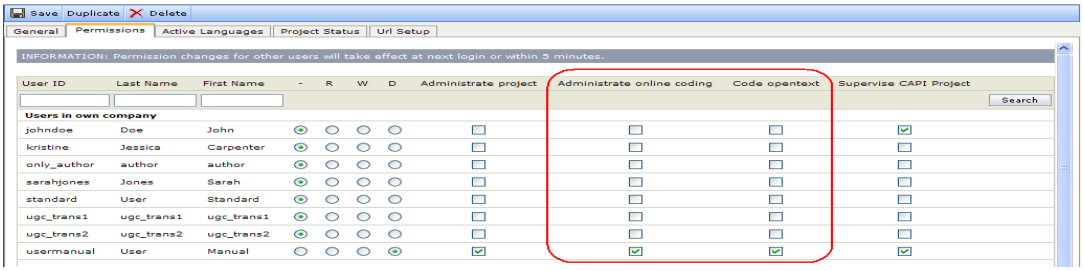


Figure 508 Example of the Permissions page

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

The user will now be able to assign coders to questions and activate filters in Online Coding and/or perform the coding as specified.

17.4. One Multi for Each Open-Ended

For each open-ended question which is to be coded, a new multi question must be added to the project.

1. Add the multi question in the normal way by dragging a new multi question into the Questionnaire Tree.

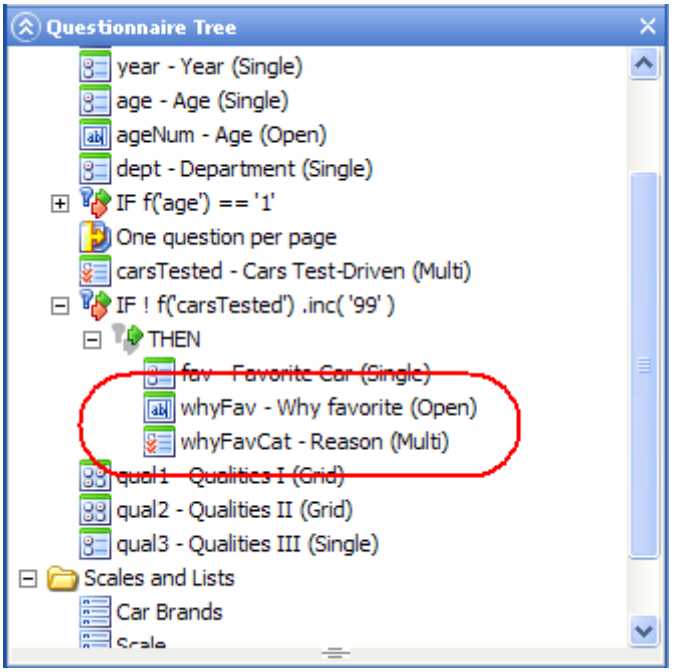


Figure 509 A Multi question for online coding

   This question functions in the same way as all other multi questions; answer alternatives and corresponding precodes 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 precodes to the list.
3. Click the **Properties** button to open the Properties list for the question.

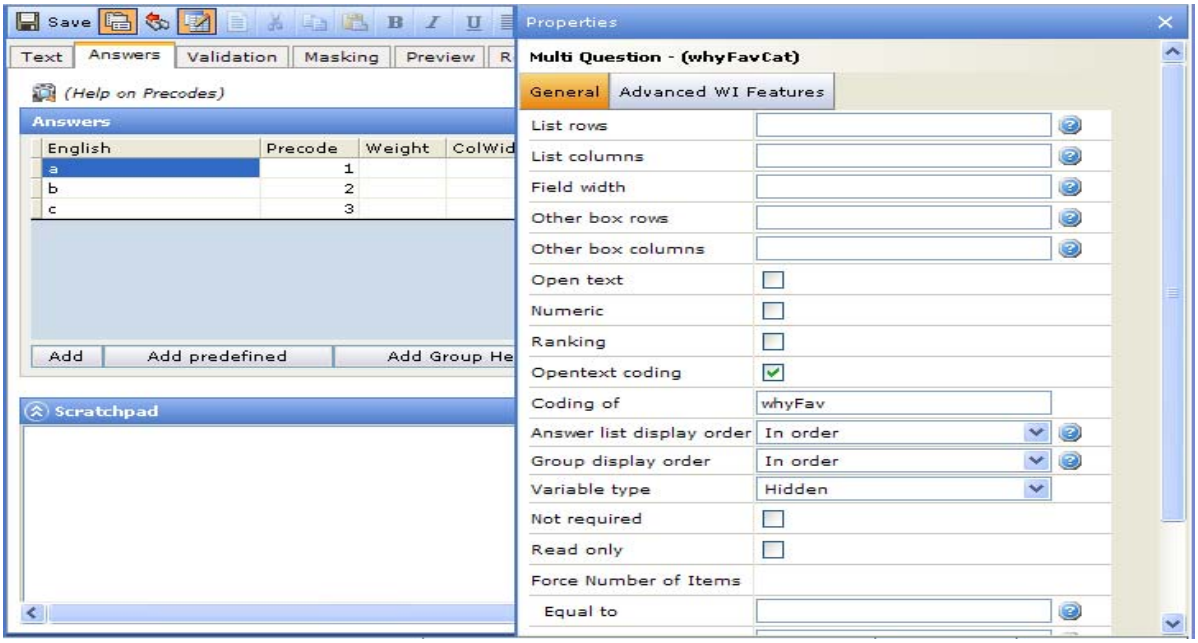


Figure 510 Defining the multi question for online coding

Here you define which questions are to be linked. The Properties list includes a new checkbox; **Open text coding.**

4. Click in the **Opentext coding** checkbox to select it.

   The **Coding of** field appears. This field is where you specify which open-text question is to be coded by this multi.

5. Type into the **Coding of** field the qID of the open-ended question (in the example above this is **whyFav**).
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 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	qID	
Multi with "Open Text" checked off in *Properties*	qID _precode	E.g: q5_3 will let you recode the answer alternative with precode 3 from the Open Text Multi question q5.
Multi or Single with an "other" – option specified in the answer list.	qID _precode_ other	For example: q6_98_other Here 98 is the set precode of the "other" option in the answer list. With "other" you always have to include _**other** after typing the qID and the precode.

Examples of multi questions defined for online coding

17.5. Locking the Questions for Coding

Note: 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 multi questions. To open the window:

1. Go to the **Survey Data > Online Coding** menu command.

   The Online Coding window opens.

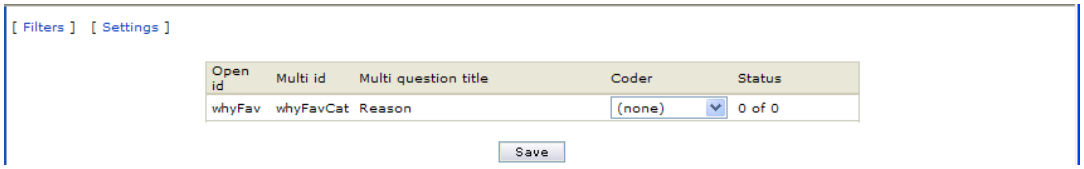


Figure 511 The Online Coding window

   This page lists all the questions that are available for coding (in the figure above, only one question is 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 (go to Object Permissions on page 377 for more information).

3. Select the coder you wish to allocate to the question and click **Save**.

When a coder is allocated to a question, a hyperlink is created to the coding window for that specific question and that specific coder (the Open id etc. text turns 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 question at one time.

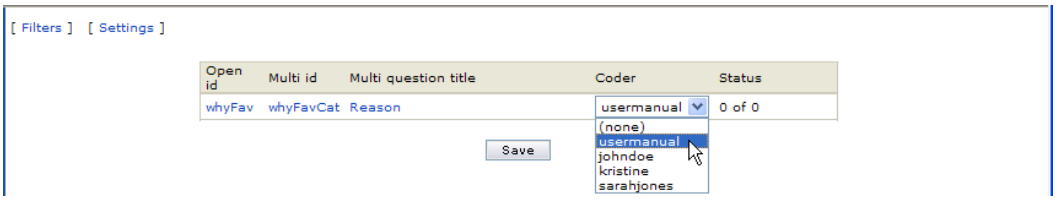


Figure 512 Selecting a coder to work on a question

The window for permissions and bindings will look different depending on whether you are the administrator or a coder. The administrator specifies which coder is to work on which question, and can activate filters defined in Online reporting. in addition, if a coder has accessed a question that has the status "(none)", then the name of the coder will appear in the administrator window.

If for example you wish to code only the answers given by a particular group of respondents, you can activate the filters defined in Online Reporting. Only Project Administrators and Online Coding Administrators can activate filters. All global filters that have been defined in Reporting, and all interview Statuses, will be displayed when you click the **Filters** link in the upper-left corner of the window.

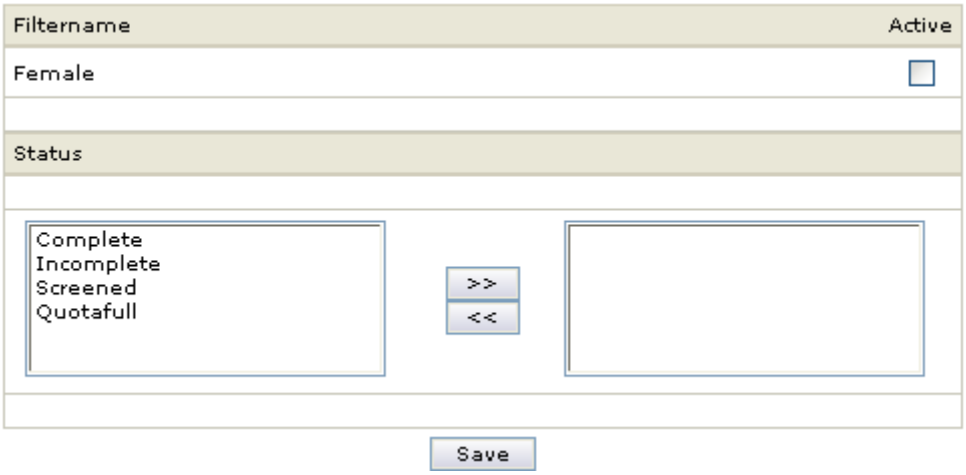


Figure 513 Example of the filters

Click **Settings** to open the Code Separator specification page. Here you define the character that is to be used as the separator (comma or dot) when entering multiple codes for the same case.

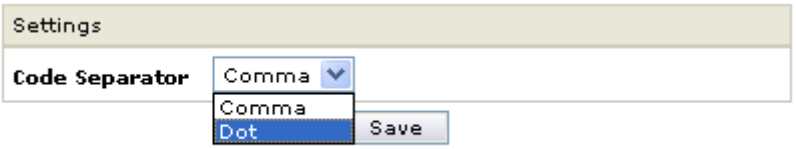


Figure 514 The Code Separator page

The coders will see a window such as that shown in the example below:



Figure 515 Example of the coder window

17.6. Coding Window

After a question has been allocated to a coder (go to Locking the Questions for Coding on page 379 for more information), the specified coder can 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 be able to click on hyperlinks for questions to which he/she is allocated.

The coding window is where the coders can create a working set by searching 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.

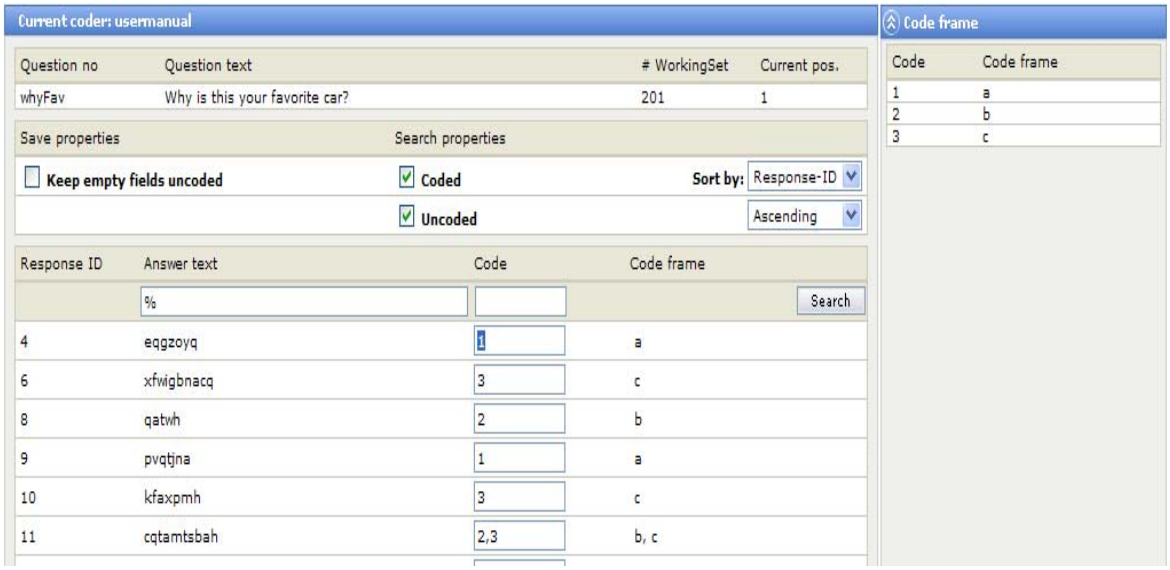


Figure 516 Example of the coding window

Press the **<Enter>** key on your keyboard to move the cursor to and activate the next field in the Online Coding Window.

17.6.1. Elements of the Coding Window

17.6.1.1. Heading

The heading of the Coding Window shows the question that the coder is currently working on, and includes:

- Question no.
- Question text.
- Working set size.
- Current position in the working set.

17.6.1.2. Searching and Sorting

The central section of the coding window is for "searching and sorting" answers.

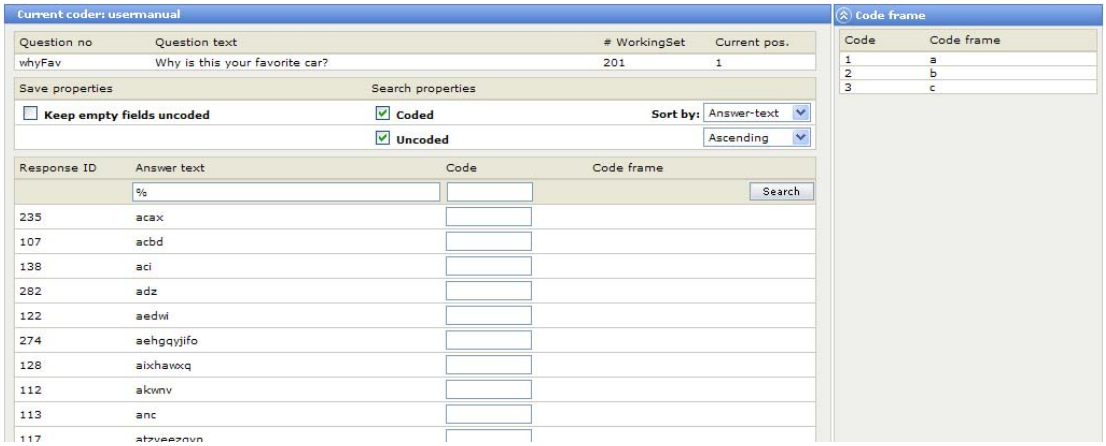


Figure 517 The searching and sorting section

You can include or exclude coded and/or un-coded questions in the working set of respondent answers. The default is "un-coded", to list all the questions that have not yet been coded. To be able to specify the working set, especially when the total number of respondents is very high, 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:	%Textstring%
Starts with:	Text string%
Ends with:	%Text string
Exact search:	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 or dots as required (go to Locking the Questions for Coding on page 379 for more information).
3. Click **Search**.

Once your working set is established, you can sort it 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 working set is changed, so clicking any button will return to the start of the new working set.

17.6.1.3. Working Set and Coding

The working set consists of all the respondents for the current question, or the result of the search that the coder has executed in the search fields shown above.

To code an answer:

1. Read the Answer Text you wish to code.
2. In the Code Frame in the upper-right corner of the window, choose an a code appropriate to the respondent's answer.
3. Type the Code into the Code field for the selected answer text.

   The Code Frame text corresponding to the typed Code is added to the Code Frame column opposite the Answer Text.

As answers are coded, updates to the working set are made when you click **Save** or the navigation buttons. The coder will then see only the remaining un-coded answers.

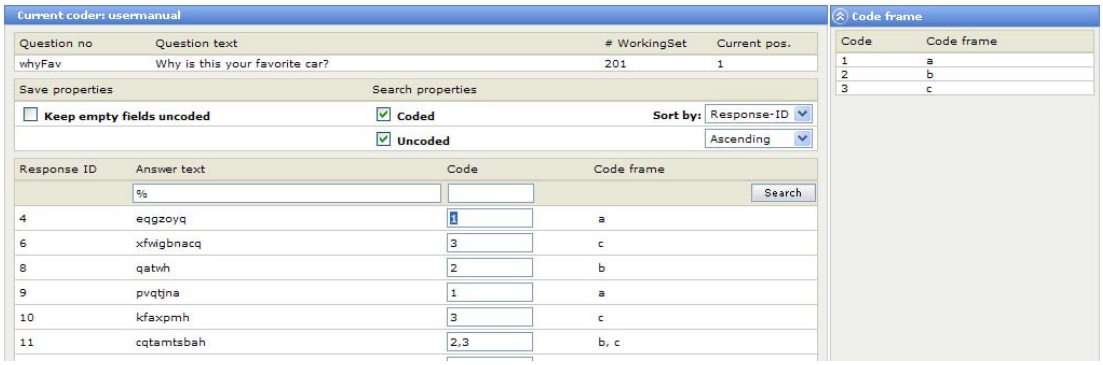


Figure 518 Coding the answers

The Codes that have been added originally to the multi question (those that are displayed in the Code Frame) might be changed or added to. Whenever a code is changed or added, it is reflected in the code frame field with the corresponding code words.

Each answer has a corresponding edit box. Arrow keys can be used to move between these edit fields. As explained in the next section, the codes that are added or changed will be saved whenever the navigation buttons or the save button has been pressed.

Codes must be entered that correspond to the precodes defined for the multi question. Should a code be entered which is not included in the precode list of the multi question, a system-generated error message will appear, warning the coder to enter a valid code.

For answer alternatives with multi-punches, remember to separate the codes with a comma or a dot as specified in the Online **Coding > Settings** link (go to Locking the Questions for Coding on page 379 for more information).

If you check the **Keep empty fields un-coded** box, the answers that have been shown in a working set 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 in a working set.

17.6.1.4. Navigation

Navigate through the set of respondent answers in the current open-ended question by using the arrow buttons below the answer list. The buttons in the image below show an example where the coder has chosen to have 15 answers on the screen. The coder can navigate back (<< prev 15), forward (next 15 >>), or to the beginning or end of the record set.



Figure 519 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 (go to User Settings on page 376 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 when an interruption in the coding is expected, such as a break or on completion of the coding).

17.6.1.5. 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 AC (i.e. code 4), into another category called Comfort (i.e. code 1).



Figure 520 Using the Replace function

As this is an operation that replaces the codes and is IRREVERSIBLE, the replace function should be used with caution. A warning message will appear showing how many codes will be affected. If the codes are correct, click **OK** to continue, otherwise click **Cancel** to end the operation.

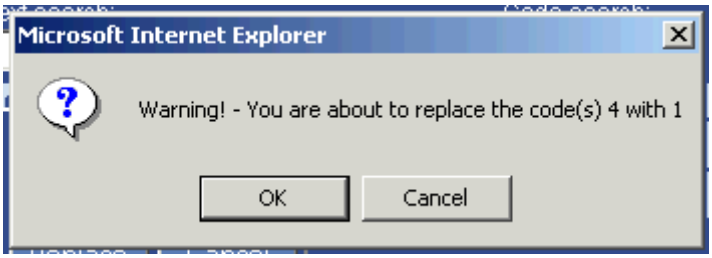


Figure 521 Example of a Warning

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 precode list of the multi question.

17.7. Final Comments

In summary the Online Coding Tool consists of the following main parts:

- Specific settings in the user settings and in project permissions.
- Control panels for setting permissions to the specific open-text questions, and for choosing which questions are to be coded.
- The main coding window where all the coding is performed.

17.7.1. Step-by-Step Guide for Online Coding:

1. To change the default user settings for Coding Screen Size (default size is 10) and Working size (default size is 1000), go to the **Home > User Settings** menu command and edit the default sizes. Click **Save** to save the changes. (Coder and Administrator)
2. Go to the **Project management > Overview** menu command then go to the **Permissions** tab. The Project Administrator can now grant coding access to online coders. (Administrator only)
3. In the questionnaire tree, drag and drop one multi question for each open-ended question to be coded. (Administrator only)
4. For each of the multi questions belonging to an open question, fill in the applicable codes in the answer window. Open the properties window and fill in the associated open-ended question ID and check off as "hidden". (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 > Online Coding** menu command. (Coder and Administrator)
7. Assign the coders to the questions. (Administrator only)
8. Click on the hyperlink of the question you wish to begin coding. (Coder)
9. The coding window appears showing the list of answers for the chosen question. The answers will appear in Response ID order. (Coder)
10. You may now search for certain strings or codes to ease your work with the working set. Answers can also be sorted by any of the table headings. (Coder)
11. 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 Code Frame in the upper-right corner of the window, and these are those defined in the multi question you have associated with the original open-text question.

18. 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 **(go to The Question Filter on page 390 for more information).**

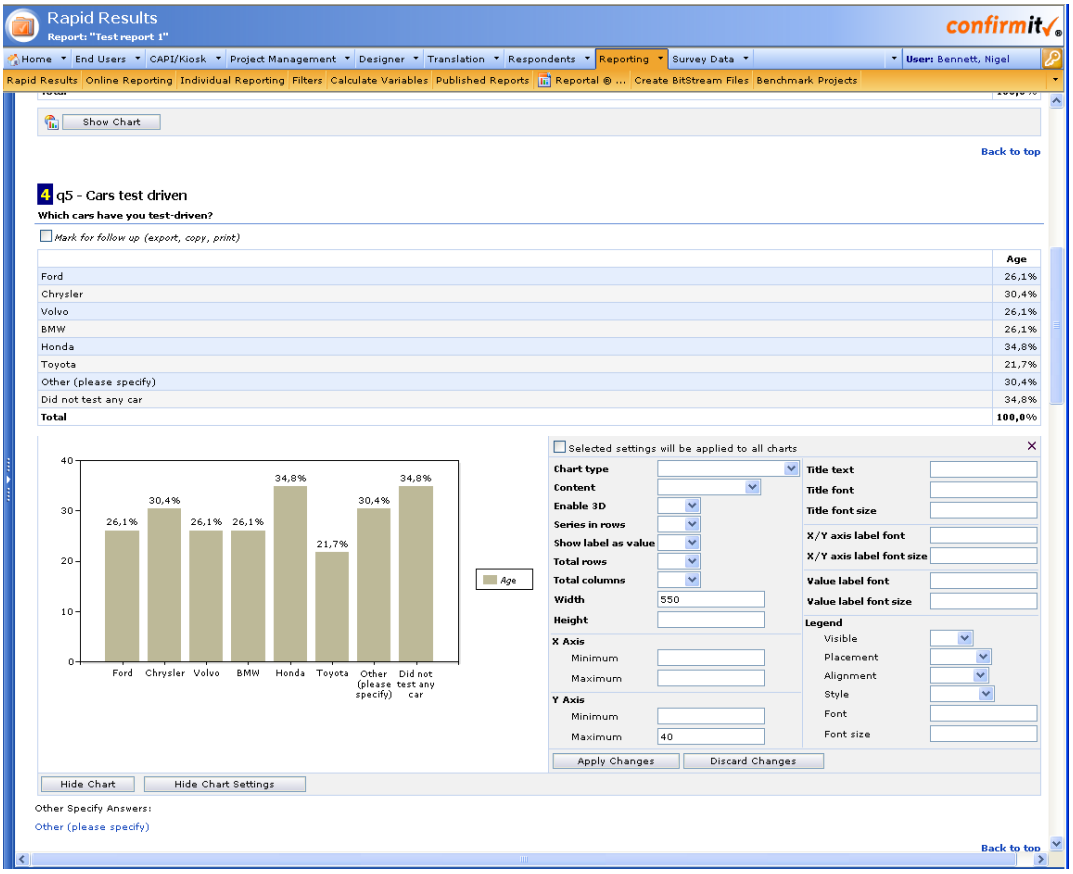


Figure 522 Example of the Rapid Results window layout

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: 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.

18.1. 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 (dummy or random data can also be used).

18.2. 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.

18.3. The Rapid Results Menu Bar

Rapid Results has its own menu bar, see the figure below.



Figure 523 The Rapid Results menu bar

The menu options are described in the following sections. Note that only relevant options will be available.

18.3.1. 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.

18.3.1.1. How to Create the Banner

1. In the blue **Rapid Results** menu, click **Edit Banner**.

   The Edit banner window opens as shown below.

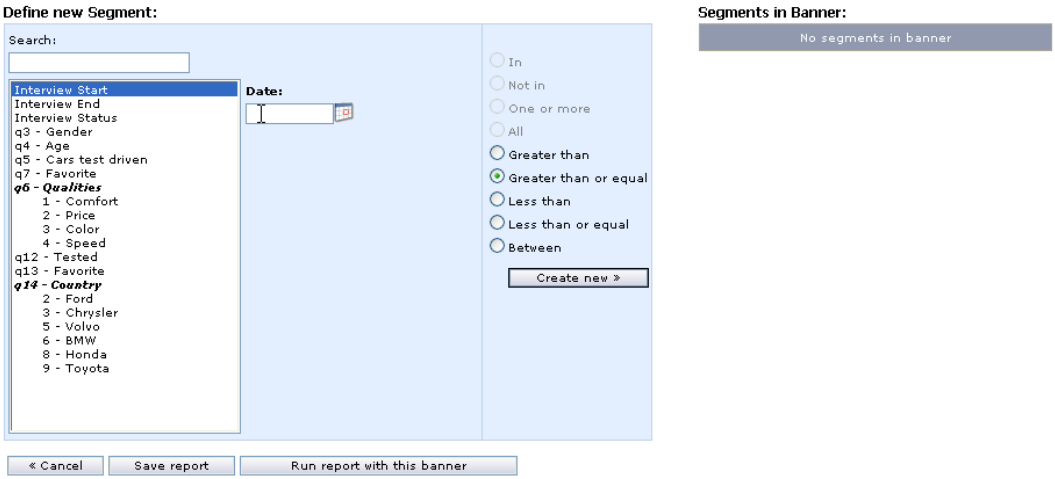


Figure 524 The Edit Banner window

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 have changed to those appropriate to the question (ringed), 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 selected the banner will have five segments (columns), one for each answer option.

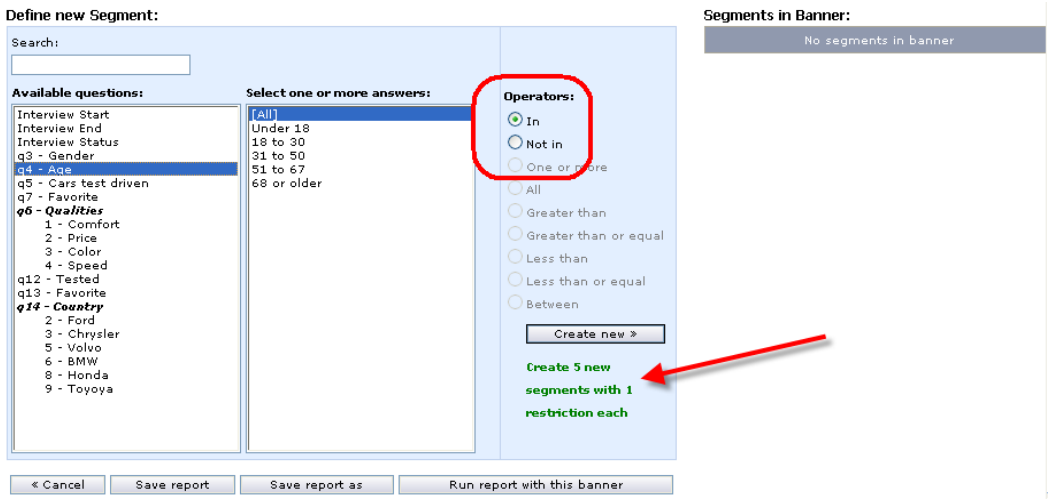


Figure 525 Example of banner editing process

3. In the central column, using standard Windows techniques, select the answer option(s) wanted in the banner, and select the appropriate filter operator (go to The Filter Operators on page 390 for more information)
4. Click **Create New** to add the selected segments to the banner.

Note: You can add as many segments as you wish to the banner. However as more segments are added, you risk the resulting table becoming unwieldy.

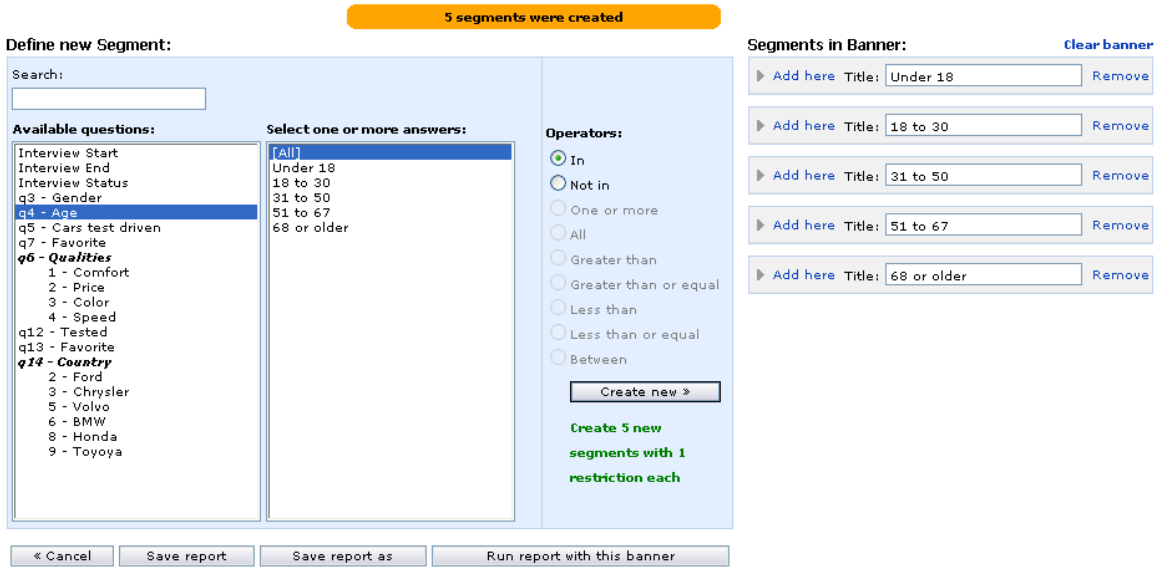


Figure 526 Example of a simple banner under creation

5. To remove an unwanted segment from the banner, click **Remove** for that segment.

   In the figure shown below, the “Under 18”, “51-67” and “68 or older” segments have been removed.

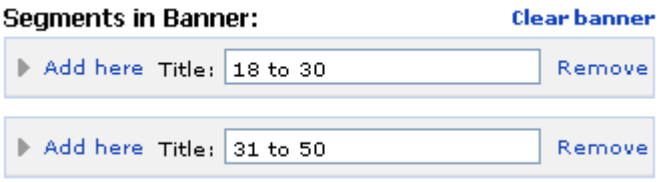


Figure 527 The remaining banner segments

To remove all the segments from the banner in one operation, click **Clear Banner**.

Rapid Results allows you to create complex columns for the result tables, where you can combine restrictions based on two or more questions in one column. To achieve this, you can add qualifiers to individual segments as required.

6. Select the question and answer options to be used as the additional qualifier to an existing segment, as stated in points 2 and 3 of this procedure.
7. In the Segments in Banner column, click **Add here** (see figure below) for a particular segment to include the qualifier in that segment.

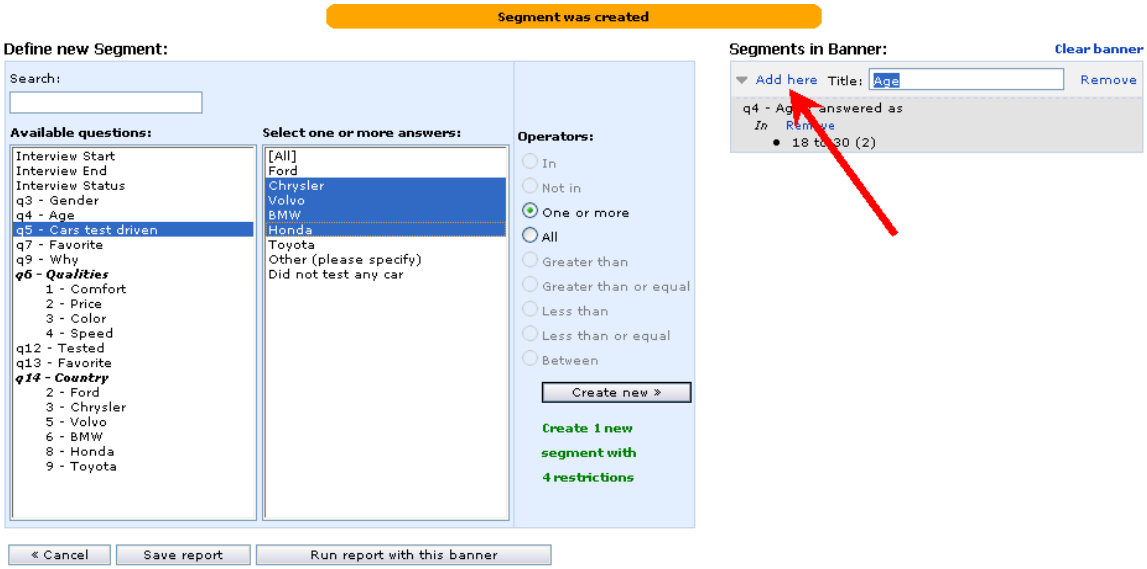


Figure 528 Adding additional qualifiers to a segment

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.

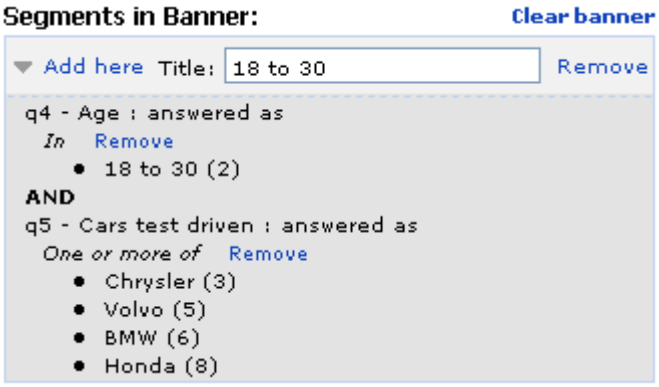


Figure 529 Example of the details pane for a segment with additional qualifier

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.

18.3.1.2. 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.

18.3.2. 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.

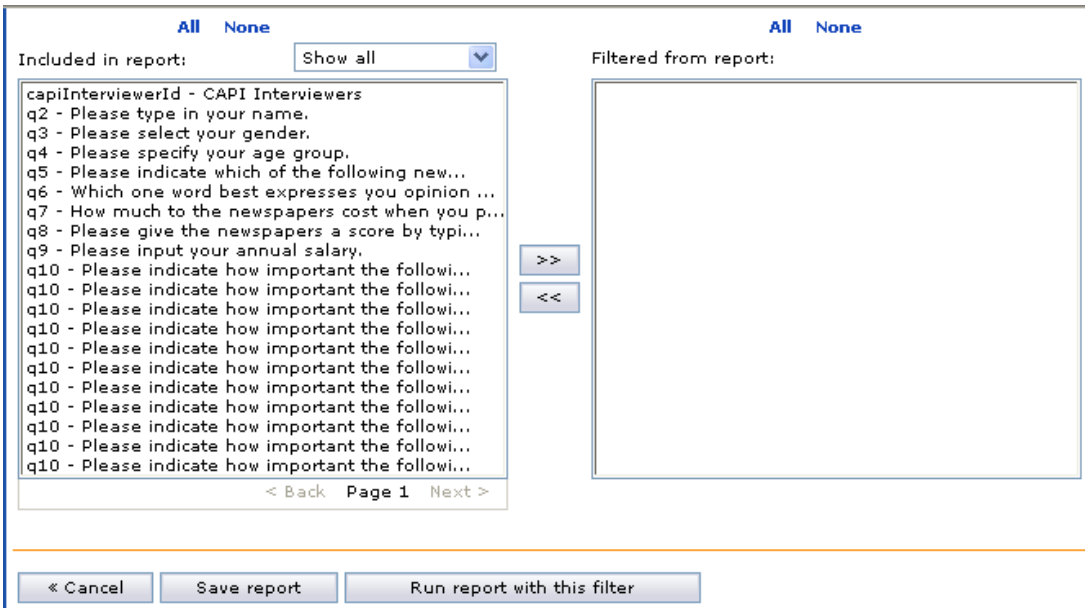


Figure 530 Example of the Question Filter page

   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.

18.3.3. 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.

18.3.4. 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.

18.3.5. 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.



Figure 531 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.

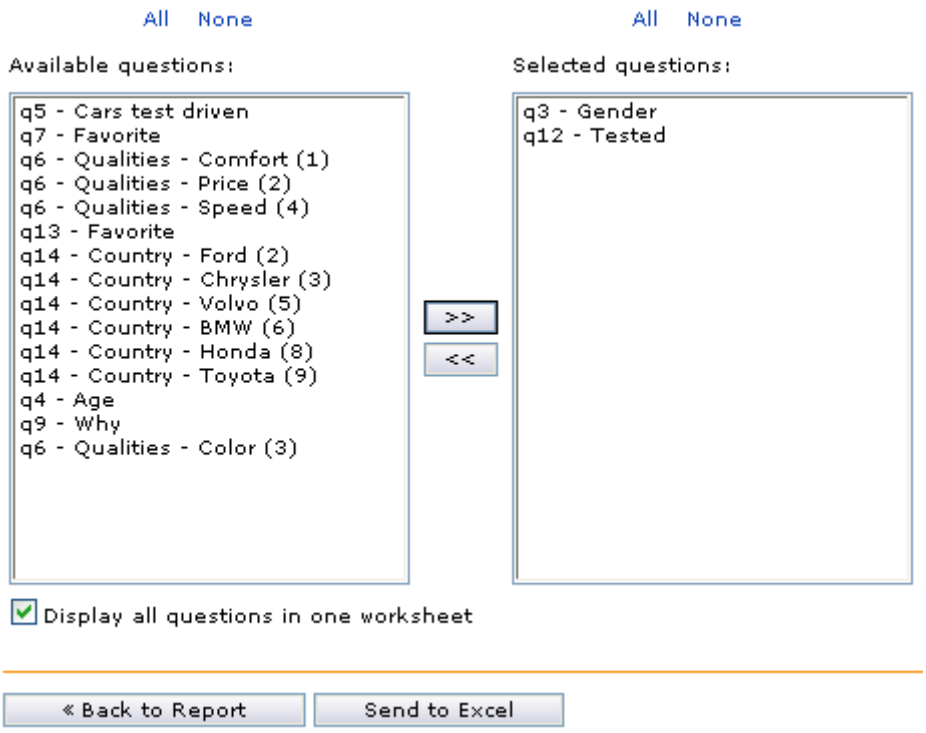


Figure 532 The Send to Excel window

The questions in the survey are listed in the Available Questions column, while any questions already selected by checking the **Mark for followup** boxes will be moved to the Selected Questions column. You can now edit your selection.

Note: Rapid Results has a time limit when exporting. If you must export a large number of questions, a message may appear to inform you that the export function has timed-out and not all of the questions have been exported. If this occurs, divide the export job into smaller batches.

3. Using standard Windows techniques, select in the left column any additional questions for which you wish to export the results.
4. Click the **>>** button to move the selected result sets to the right column.

   If you move a result set to the right column in error, select it and click the **<<** button to return it to the left column.

   In each column, click **All** to select all the questions, **None** to deselect all.

Note: The result sets will be exported to Excel in the order in which they are moved into the right column.

Rapid Results can place all the result sets onto one Excel worksheet, or each result set onto a separate work sheet.

5. Check the Display all questions… box if you want all the result sets on one worksheet.
6. Click **Send to Excel**.

   The Excel file is created and the result tables imported. On completion, the File Download dialog box opens.

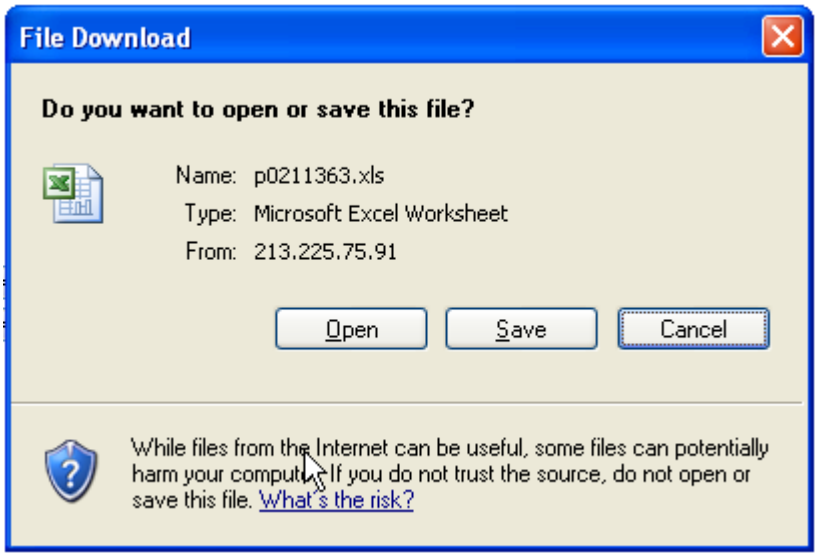


Figure 533 The File Download dialog box

7. 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.
8. Click **Back to report** to close the Export Report window and return to the report.

18.3.6. 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.

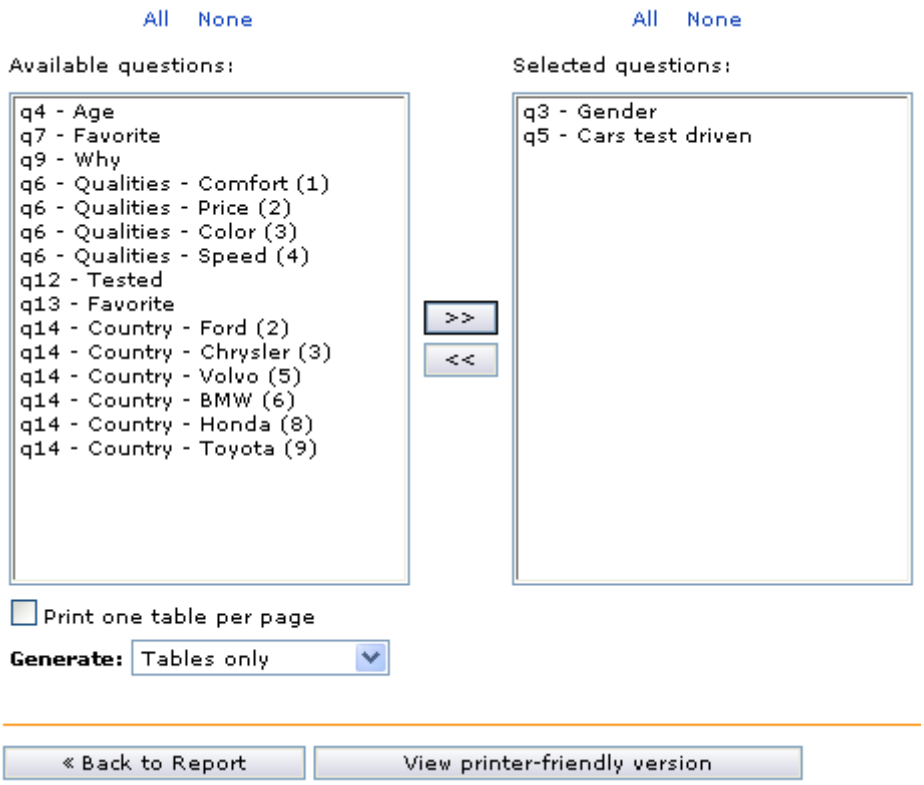


Figure 534 The Export Report (Print) window

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.

18.3.7. 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.

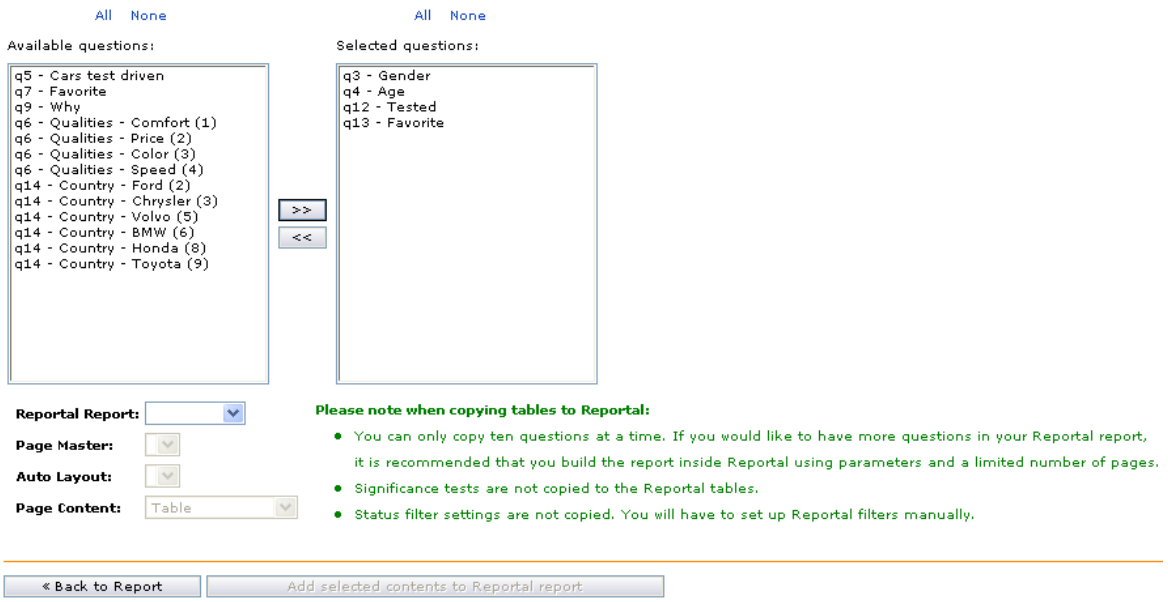


Figure 535 The Export Report window with some questions selected

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.

18.4. Report Settings and Navigation

Below the Rapid Results menu bar are a number of filter and selection possibilities.

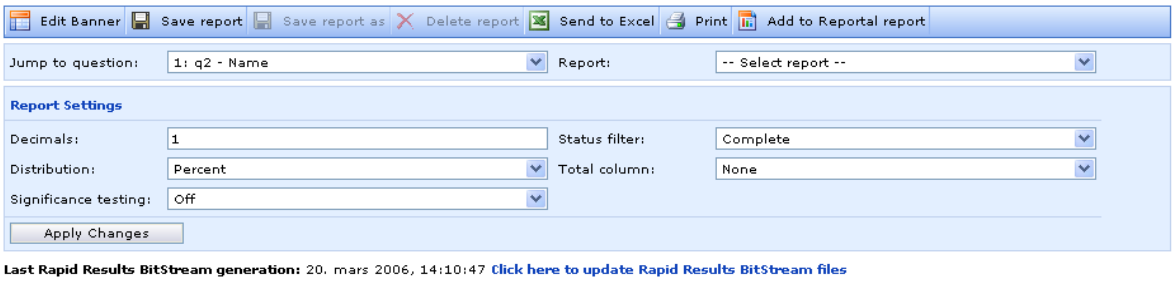


Figure 536 The report settings and navigation options

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.

18.4.1. 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.

- **Decimals** – the number of decimal places to be used when displaying numerical results (percentages and averages).
- **Distribution** – specifies how the results are to be presented.
  - **Count and Percent** – gives both the actual figure for the number of respondents choosing this answer, and that figure as a percentage of the total.
  - **Count** – gives the actual figure for the number of respondents choosing this answer.
  - **Percent** – gives the result for each option as a percentage of the total.
- **Significance testing** – will check statistical significance between the results in the columns in the aggregated table when they have independent samples.

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.

  - **Off** – no confidence testing is performed on the results.
  - **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.

18.5. 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**.

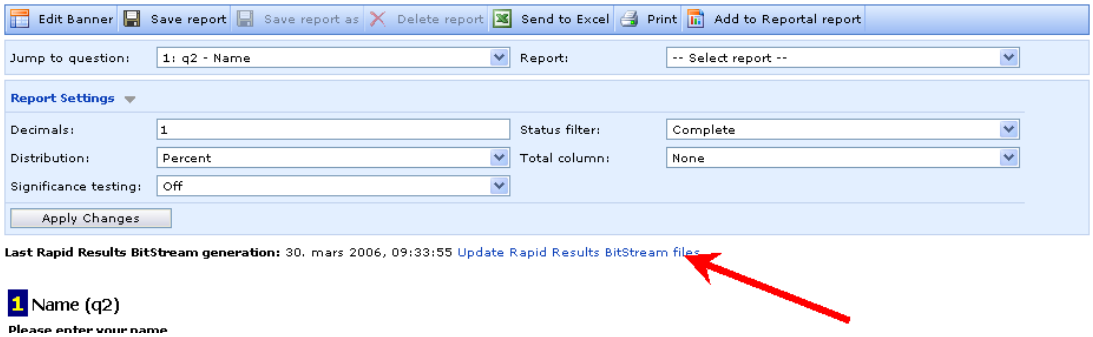


Figure 537 The Update BitStream Files link

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.

18.6. Editing Result Charts

When the Rapid Results window first opens, the question result tables will be listed with the charts hidden.



Figure 538 An example of a question listed in Rapid Results

To display the chart for a specific question, go to that question and click **Show Chart**.



Figure 539 The same question with its chart open

You can now edit the chart settings. Click **Edit Chart Settings** to open the settings table for the chart.

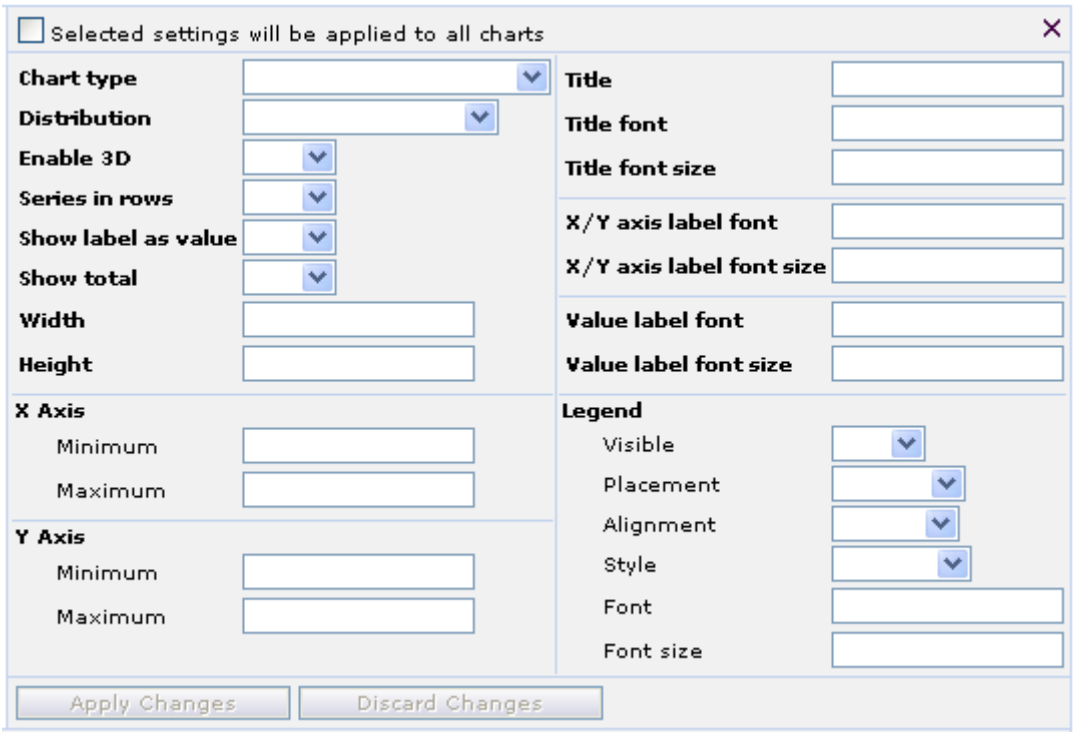


Figure 540 Example of the chart settings table

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**:
  - **Title text** – type in the text you wish to appear as the title for the chart.
  - **Title font** – type in the font you wish to use to present the title text.
  - **Title font size** – type in the font size you wish to use to present the title text.
- **X/Y Label settings**:
  - **X/Y Axis label font** – type in the font you wish to use for the chart axes labels.
  - **X/Y Axis label font size** – type in the font size you wish to use for the chart axes labels.
- **Value label settings**:
  - **Value label font** – type in the font you wish to use for the result value labels.
  - **Value label font size** – type in the font size you wish to use for the result value labels.
- **Legend settings**:
  - **Legend Visible** – select **Yes** to show the legend, **No** to hide it.
  - **Placement** – the legend box can be positioned above, below or to one side of the chart. Select the position in which you want the legend box to be displayed.
  - **Alignment** – once you have decided which side of the chart you want the legend box to be placed, you can specify its position more accurately with respect to the chart origin. Select the location here.
  - **Style** – the legend can be presented as one column of details, as a row, or as a “best fit” table. Select the desired option here.
  - **Font** – type in the font you wish to use for the texts in the legend box.
  - **Font size** – type in the font size you wish to use for the texts in the legend box.
- **Apply changes** – saves the parameter changes you have made. Note that once you have applied the changes you cannot later discard them.
- **Discard changes** – removes all the changes you have made to the settings table parameters since the last time you clicked **Apply changes**. Note that this is not a step-by-step Back or Undo function; all the changes will be removed.

19. The Advanced Filter Designer

You can create filters for yourself (and other Confirmit authors) to use while you are working on the questionnaire and the respondent data. You can then use the filters in an administrative format to search for data, text etc.

To create a filter, you first define it, then you drag the appropriate questions from the questionnaire tree and drop them into the filter folders.

You can have two types of relationships between the elements in a filter: they can be linked with the **AND** operator or with the **OR** operator. These objects are located in the Components branch towards the bottom of the questionnaire tree, and you can drag then into to the filter branch as required. You can invert the logic and toggle between AND and OR as required(go to Inverting the Logic on page 404 for more information). You can also define levels in advanced filters.

19.1. Worked Example

This worked example describes step-by-step how to build an advanced filter. This example in based on a fictitious survey that is intended to discover people's requirements and attitudes when buying a new car. The filter is based on two single questions (in this case Gender and Age), one multi question (Cars Text-Driven) and one grid question (Qualities I).

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 Mercedes, 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.

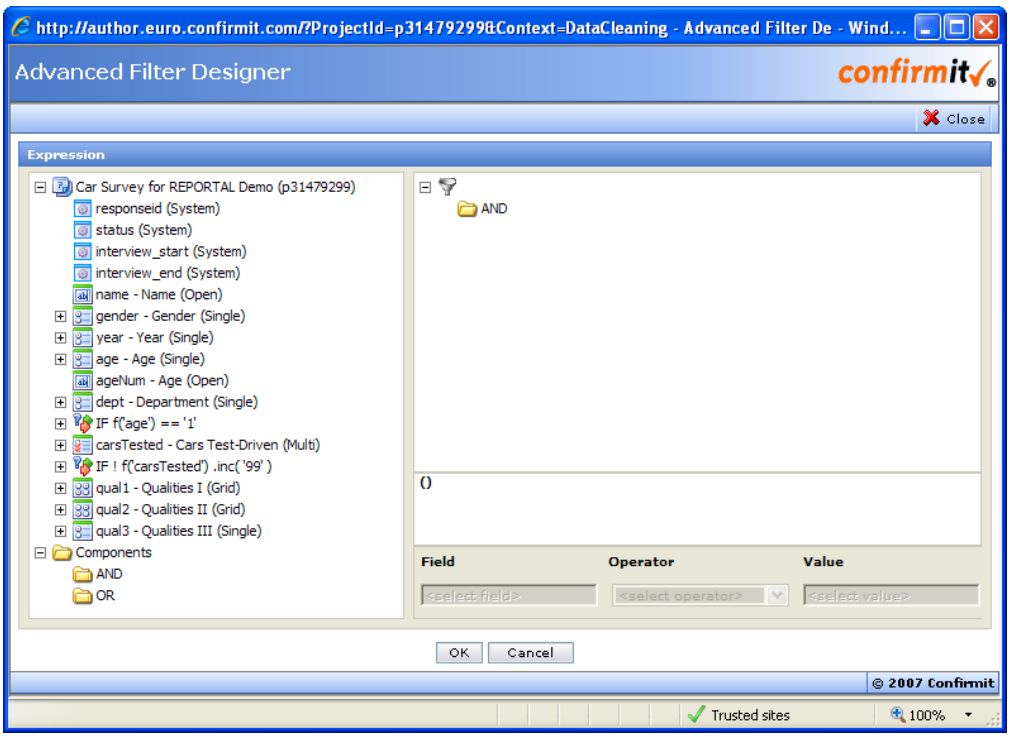


Figure 541 The Advanced Filter Designer window

3. Drag the **Gender, Age** and **Cars Test-Driven** questions from the questionnaire tree and drop them into the **AND** folder in the filter.

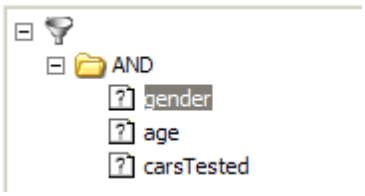


Figure 542 The three questions in the filter

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 Condition 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.

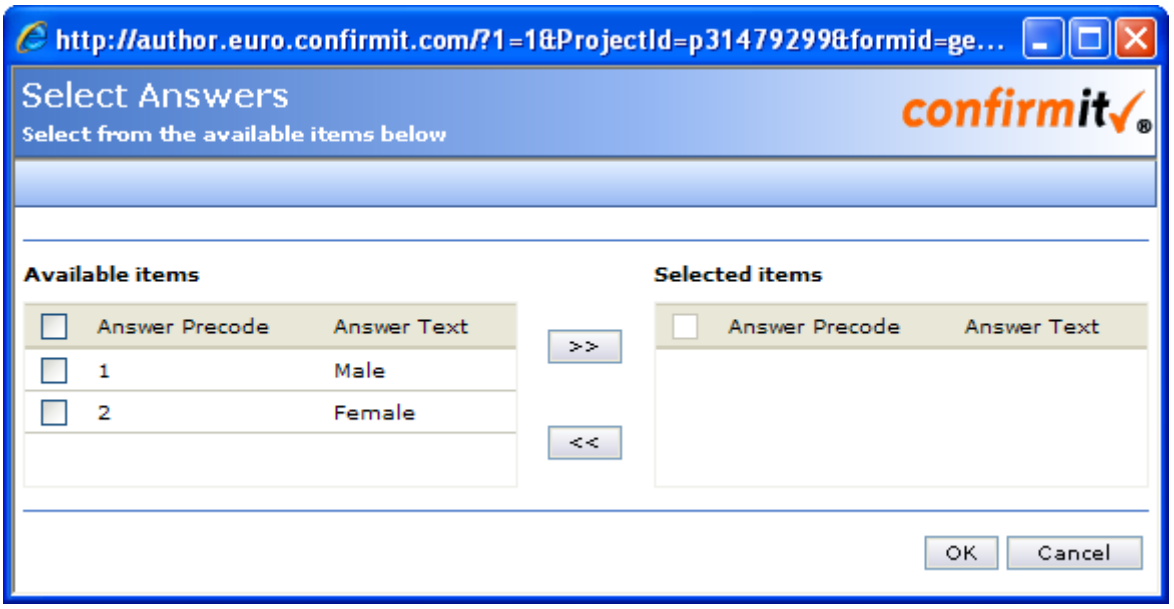


Figure 543 The Select Answers window for the Gender element

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.

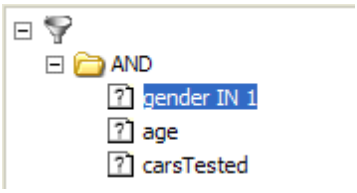


Figure 544 The Gender element with Male (precode 1) specified

7. Click on the **age** element to activate the condition 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.

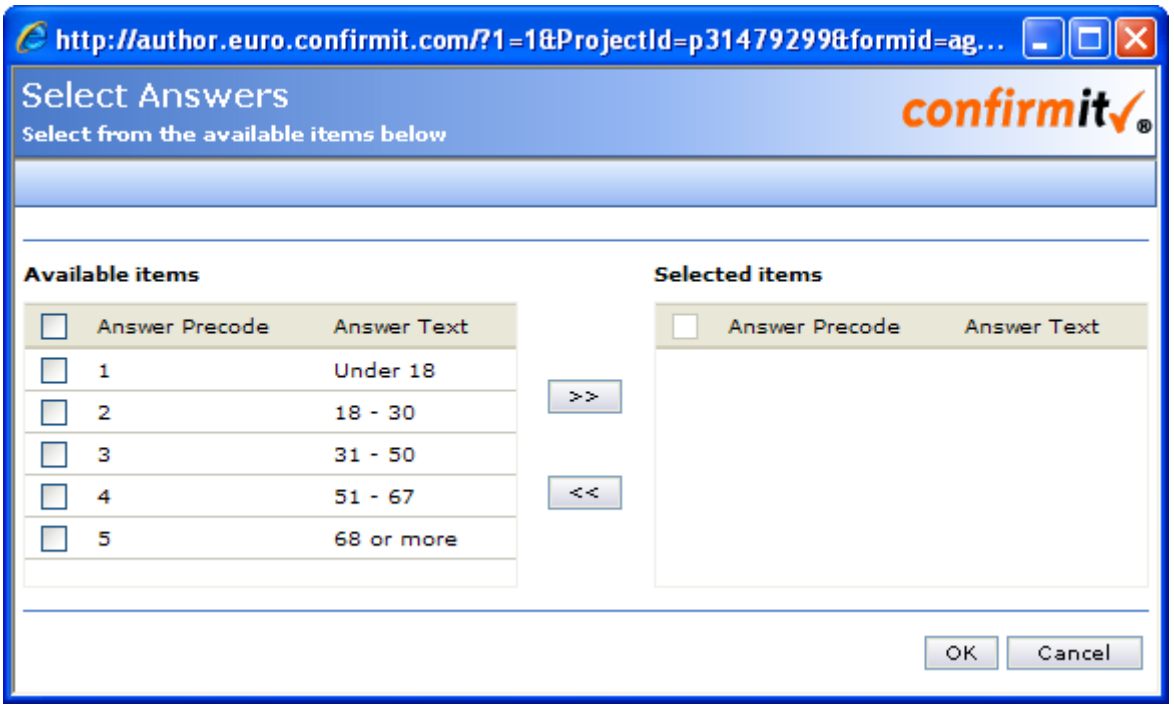


Figure 545 The Select Answers window for the Age element

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.

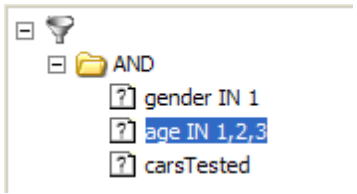


Figure 546 The Age element with precodes 1, 2 and 3 selected

10. Click on the **carsTested** element to activate the condition builder for that question.

    The Operator options change to AND and OR. Here in this case we need OR.

11. Click the down arrow beside the Operator field and select **OR** from the drop-down list then click the ellipses button beside the **Value** field.

    The Select Answers window opens.

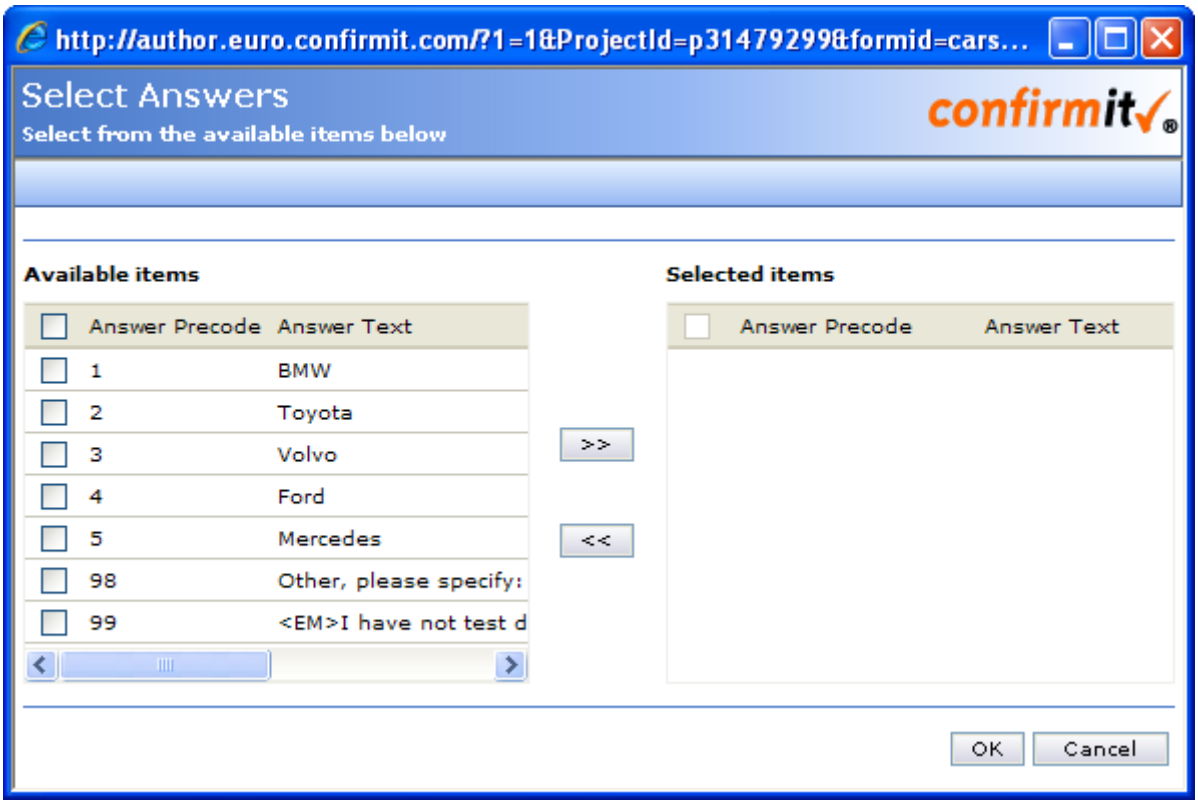


Figure 547 The Select Answers window for the carsTested element

12. We are looking for people who have test-driven BMW or Mercedes, so in the Available Items column select **1** and **5** then click the **>>** button.
13. Click **OK** to close the window.

    The expression should now look as shown below.

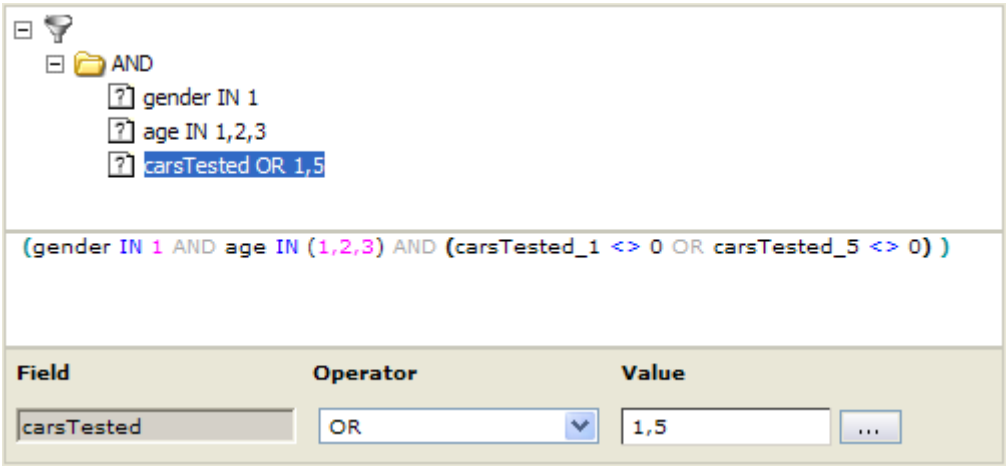


Figure 548 The resulting filter expression

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.

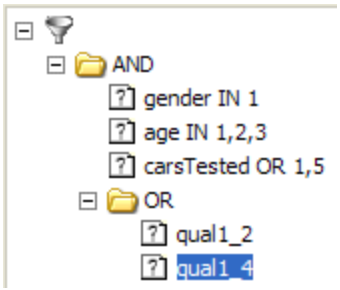


Figure 549 The filter with the qual1 elements

16. Click on the **qual1_2** element to activate the condition builder for that element, click the ellipses button to open the Select Answers window, and select the required answers (precodes **4** and **5**).
17. Repeat for the **qual1_4** element.

    The result should be as shown below.

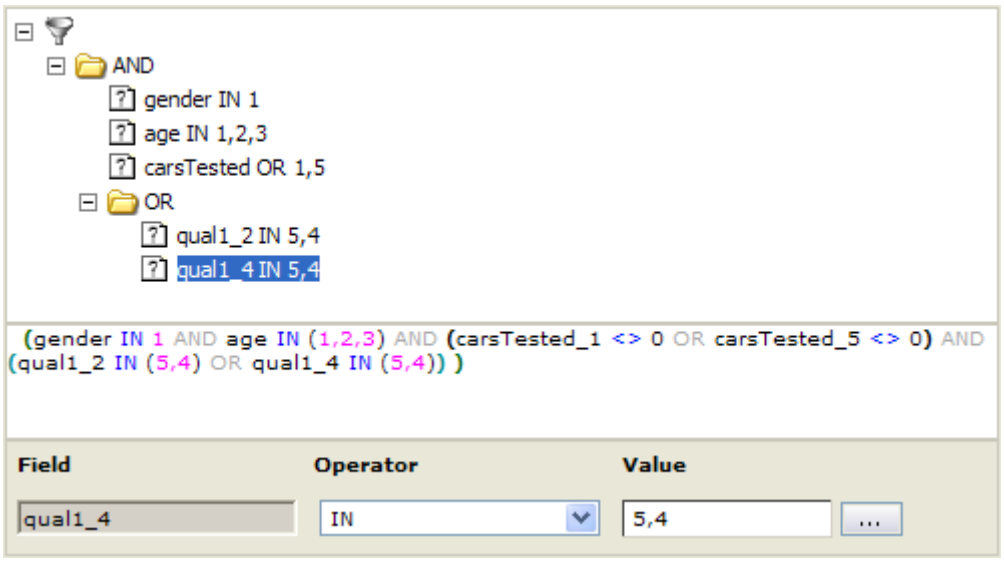


Figure 550 The final filter expression

The filter is now complete. Click **OK** to close the Advanced Filter Designer window.

19.2. 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.

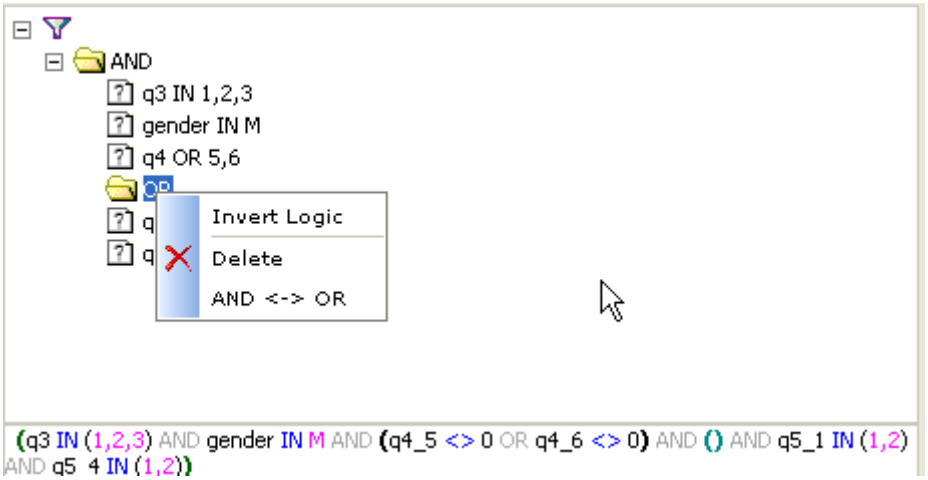


Figure 551 Inverting the logic or switching between AND and OR

19.3. 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 Condition 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.

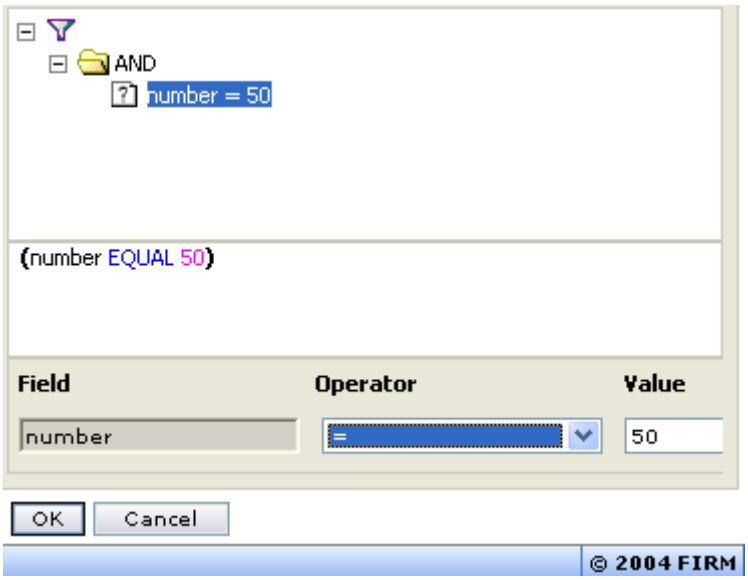


Figure 552 Defining a filter value for a numeric question

Multi Open Text Numeric questions must be expanded first, and the single items can then be dragged into the filter designer.

19.4. Operators for Interview Start and Interview End

For filters defined on Interview Start and Interview End, the operators are the same as for Numeric questions (see the previous section). In these filters a calendar button is available next to the Value field. To define the Value for the filter, click on the button and select a date from the pop-up calendar.

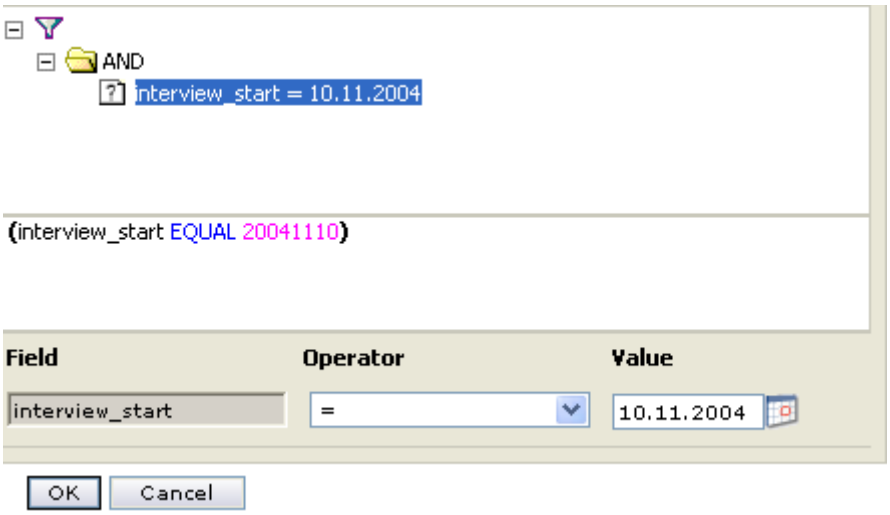


Figure 553 Defining a filter on interview start

20. Aggregated Reporting

Note: For some of our customers, parts of the Reporting functionality (Advanced Reporting: Iterated Reporting, Pivot View, Individual Reporting (go to Individual Reporting on page 472 for more information)) will be subject to payment based on the use of selected functions.
A reporting module – Confirmit Reportal – is available in Confirmit. Confirmit Reportal is a platform for creating and administrating online Report portals. For further information see the Reportal User Guide.

Note: This functionality will not be available for projects using the Optimized database format. The functionality is included in and superceded by Reportal. Refer to the Reportal User Guide for further information.

Control of Online Reporting - to prevent overload and negative impacts on all users of the authoring environment, reports configured outside what is defined in the Acceptable Usage Policy and run from within Online Reporting or from within Reportal, may time out if causing excessive strain. To avoid this you can for example do the following:

- Reduce the number of questions used in a crosstab – instead of inserting many questions in Cross and With folders, you can split them up in several crosstabs
- Mask away the answer alternatives you do not need to display

20.1. Introduction

All reporting functionality in Confirmit is accessed by going to the **Reporting** menu command in the main menu. Select the **Online Reporting** menu command to open the window shown in the figure below.

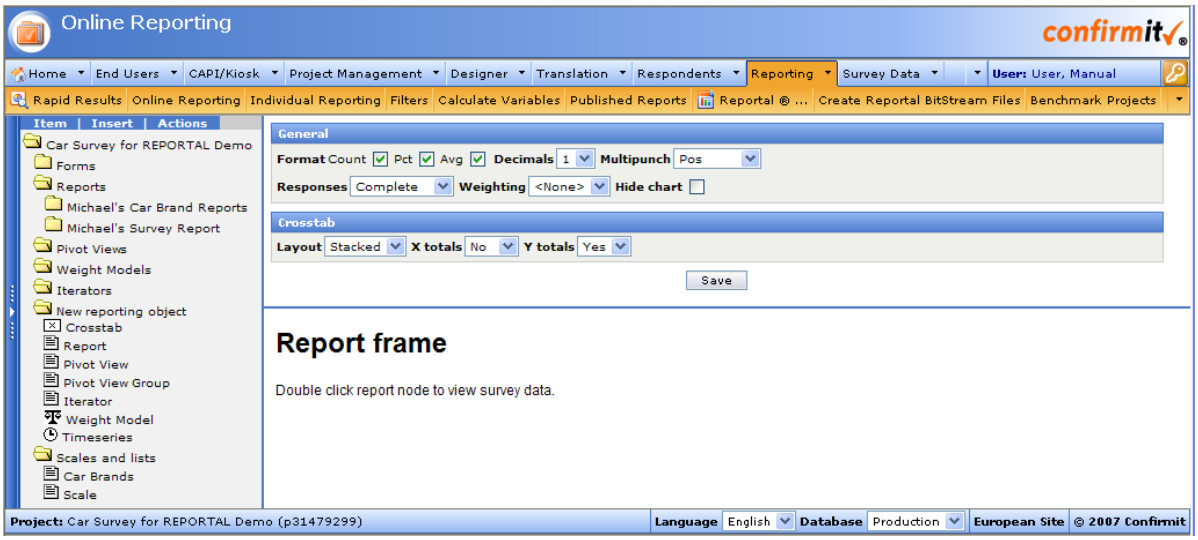


Figure 554 The initial reporting screen

This screen consists of three frames:

- **The reporting tree -** a tree containing all your reporting objects. That is forms, new reporting objects, reports, scales and lists, and matrix views. The menu on top of the tree is called the **report tree menu**.
- **The settings frame -** a frame with General settings for the reports. These General settings can be overridden by setting specific properties for the report nodes. To get more space on the screen for tables and charts, the general option frame can be toggled. Toggling is done from the reporting tree menu: 'Edit->Toggle options'.
- **The report frame -** the frame where all report tables and charts are displayed, or the properties of the report node when chosen.

You can expand the report tree by right clicking the top-most folder in the report tree and choosing Expand Tree from the resulting drop-down menu.

20.2. Checking a Single Question

The easiest way to check the answers of a single question is to enter the **Forms** folder in the reporting tree:

1. Go to the **Reporting > Online Reporting** menu command.
2. In the report tree, click on the **Forms** folder icon to open the folder.

   This shows the routing in the same way as the questionnaire tree in the questionnaire.
3. Locate the question you are interested in.

   As the sub-folders, condition trees and loops are all initially closed, you should know something about the questionnaire routing to be able to find the question of interest.
4. Double-click the question.

   The results are shown in the lower- right frame as shown in the figure below.
5. Expand the Other-specify fields.

   Click the icon of a form containing 'Other' answer alternatives to expand the form. The sub-tree of the form will contain the open-text fields. These can be reported and dragged into reports just as any other open-text forms.
6. Expand Grids.

   Click on the icon of a grid question to expand it. All the grid elements will be shown as single questions.

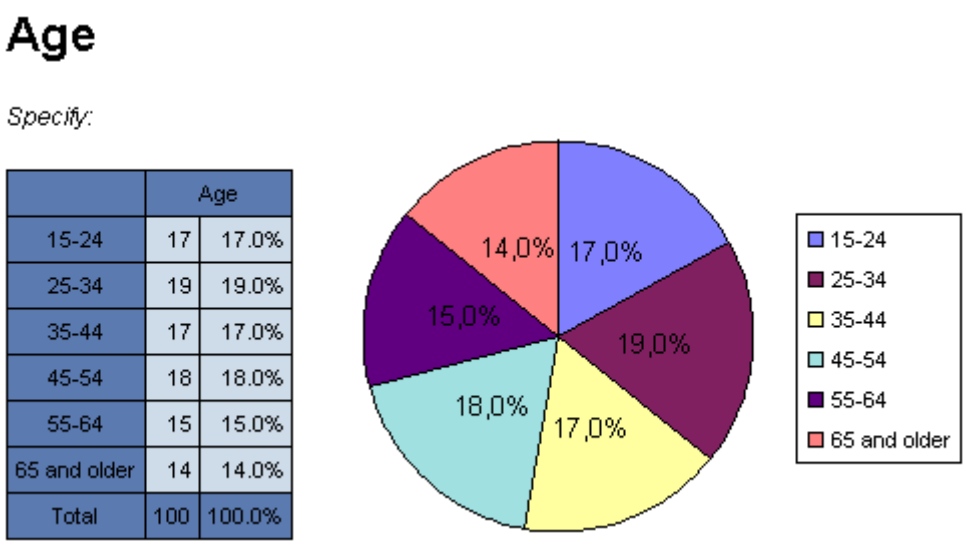


Figure 555 Reporting a single question using the Excel Chart Component

When checking results directly from the *"Form"* folder, all settings are either default settings or the settings from the *"Settings"* frame.

20.3. Recoding Variables for Reporting Purposes

If for example you wish to put a summary row on a table of an Age question and subsequently filter on it, you must add a new Single question in the questionnaire and make it into a re-coded variable in **Properties > Recoded var** (go to Recoding Data on page 469 for more information).

For example, if you have the following age precodes in your Age question:· 18-24 (precode 1)· 25-34 (precode 2)· 35-44 (precode 3)· 45-54 (precode 4)and would like a summary for 18-34 (precodes 1 or 2) and 35-54 (precodes 3 or 4), go to answers in your new Single question and insert your new categories, 18-34 and 35-54.If you then single click on the Age question, an expression builder will appear. This should make it easier to add the proper code in the expression field. The first item in the re-coded question would need the expression - age == '1' || age == '2' -written in the expression field. Actually in the expression you may enter both SQL-code and Jscript-like code, as the Jscript-code will be translated to SQL code. So something like - age = '1' or age = '2'- would also work (SQL). It is possible to go to properties and enable "Jscript based" to have it accepting only Jscript code. (You would, for example have to do this if you want to perform calculations based on weights.) After adding a re-coded variable, you must always recompile the survey using either the Incremental or the Rebuild option.

To calculate the values in the re-coded variable, go to the **Reporting > Calculate Variables** menu command.

Note: This functionality will not be available for projects using the Optimized database format. The functionality is included in and superceded by Reportal. Refer to the Reportal User Guide for further information.

You can do this manually as required when new respondents complete the survey, or you can set the variable calculation to run automatically as a recurring task. When you go to **Reporting > Calculate Variables**, the page shown below opens.

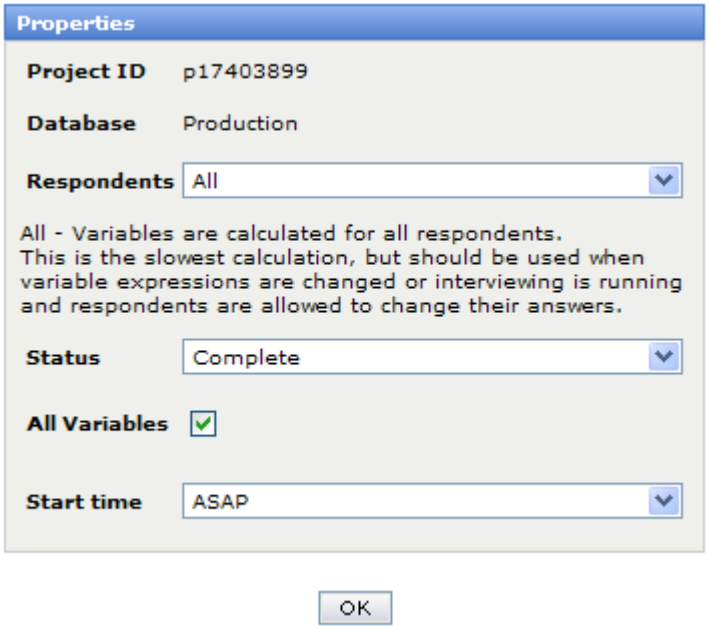


Figure 556 Calculating the Variables

The fields and options are as follows:

- **Project ID** - the ID of the selected project, so you can ensure you are working on the correct project.
- **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 both.
- **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 **OK**. If you have selected Schedule for later execution, then when you click **OK** the Task Recurrence page opens. In this case, make the settings as required and click **Save**.

Re-coded variables may be used as normal questions in Online Reporting.

20.4. Building Reports

Within a project, all the reports are collected in the Reports folder. By having more than one report, you can prepare reports for different target groups and order exports (ppt/Excel files), and publish reports separately. You can perform the following actions at the report level:

- **Create a new report -** by dragging a **New Report** object from the **New reporting objects** folder into the **Reports** folder.
- **Change name -** right-click on the report name in the tree and select **Properties** from the menu, or select the item and go to the **Item > Properties** menu command. Change the report name in the Report Properties pane.

- **Precode mask for reports -** select the answers (for a single or multi question) and the answers and scales (for a grid question) you want to include in the report. This masking can be executed for specified question forms in a report.
- **Filters on report level -** you can apply filters to entire reports.
- **Adding questions to the report** - drag the form from the **Forms** folder and drop it at the appropriate location within the report.
- **Add cross-tabulation to the report** - drag a **New crosstab** object from the **New reporting objects** folder and drop it at the appropriate location within the report (go to How to Build a Crosstab on page 412 for more information)
- **Add time series to the report** - drag a **New timeseries** object into the report, for example within a crosstab. Select the New timeseries, then right-click and select **Properties** from the report tree menu. Configure the time series with granularity and start/end points.
- **Delete** - highlight the object, right-click and select **Delete** in the report tree menu, or select the item and go to the **Item > Delete** menu command. Both individual questions/crosstabs and entire report folders can be deleted. You can also highlight the object and press the **Delete** key on your keyboard.
- **Duplicate** - highlight the object, right-click and select **Duplicate** in the drop-down menu, or select the item and go to the **Item > Duplicate** menu command..
- **Showing the whole report** - go to the **Actions > Show Report** command in the report tree menu, or right click the report and choose **Show** from the menu. This will display the entire report in the report frame.

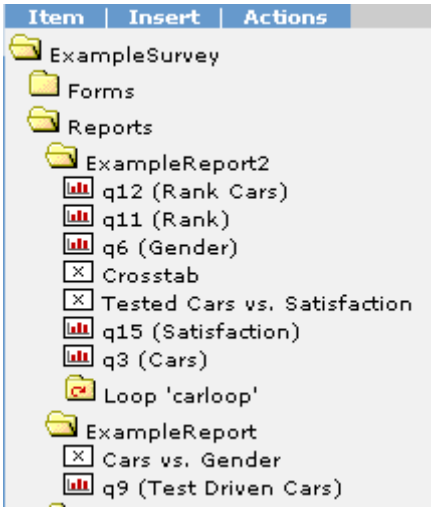


Figure 557 A project with two reports

20.5. How to Order a Report

1. Highlight the required report.
2. Go to the **Actions > Order Report** command in the report tree menu, or right-click the report and choose **Order** from the menu.

   The screen shown in the figure below opens.

Note: A PowerPoint template must be available.

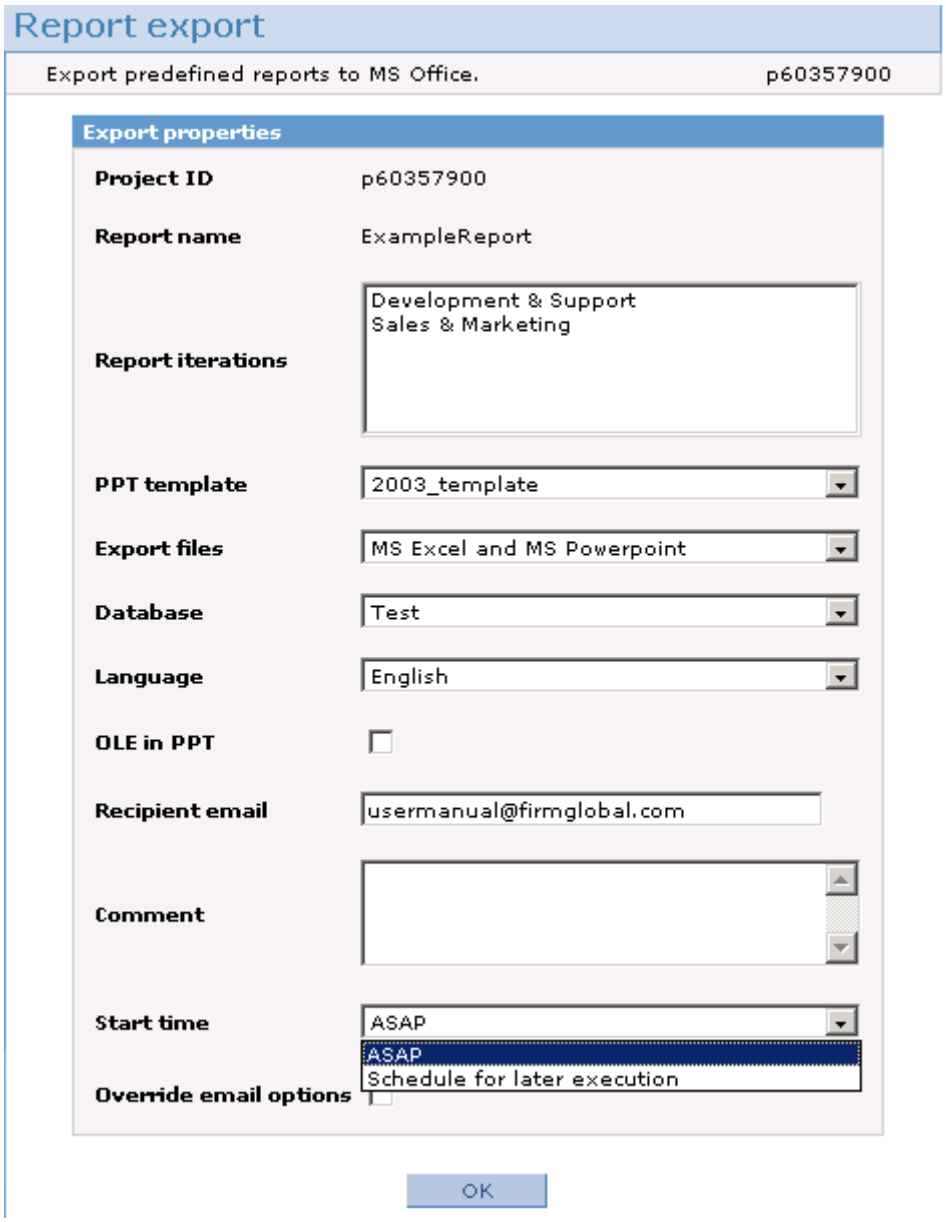


Figure 558 Example of the Report Export screen

By specifying a PowerPoint template and email address in the report frame, Excel sheets and/or PowerPoint slides will be sent to the email recipient. In User Settings you may specify in which MS Office version you wish the report to be sent.

The fields are as follows:

- **Project ID -** the system-generated project number.
- **Report name** - the report name.
- **PPT template** - select the PPT template you wish to apply to your report.
- **Export files** - select whether you wish to export to MS Excel, MS PowerPoint or both.
- **Database** - specify what kind of data you wish to export: Test or Production data.
- **Language** - select the language you wish the report to be exported to. Note that this choice must correspond to the language in your User Settings.
- **OLE in PPT** - select if OLE is to be used. This makes it possible to edit the objects in other applications than where they were originally created.

- **Recipient email** - specify the recipients email address.
- **Comment** - enter a comment for your batch job.
- **Start time -** either schedule the report to arrive immediately, or at a later point. After having submitted the request you are brought to Task settings.
- **Override email options** - when chosen, allows you to override the standard export email options and customize both the subject and the email that will be sent to the export recipient (see the figure below).
- **File transfer -** only available/displayed to users with Data Transfer Encryption (go to Data Transfer Encryption and FTP on page 2 for more information). The user may choose either to receive the encrypted file by email, or download it from the FTP server. If the user chooses to send the encrypted file to the FTP server, he/she will receive a notification email from Confirmit that the file is available for download. The user will then have to log on to the FTP server, download the file, then decrypt it with the private encryption key.
- **Encrypt file -** only available/displayed to users with Data Transfer Encryption (go to Data Transfer Encryption and FTP on page 2 for more information). The file will be encrypted.

3. Make the appropriate settings then click **OK**.

   An email is sent to the specified address, with the report attached.

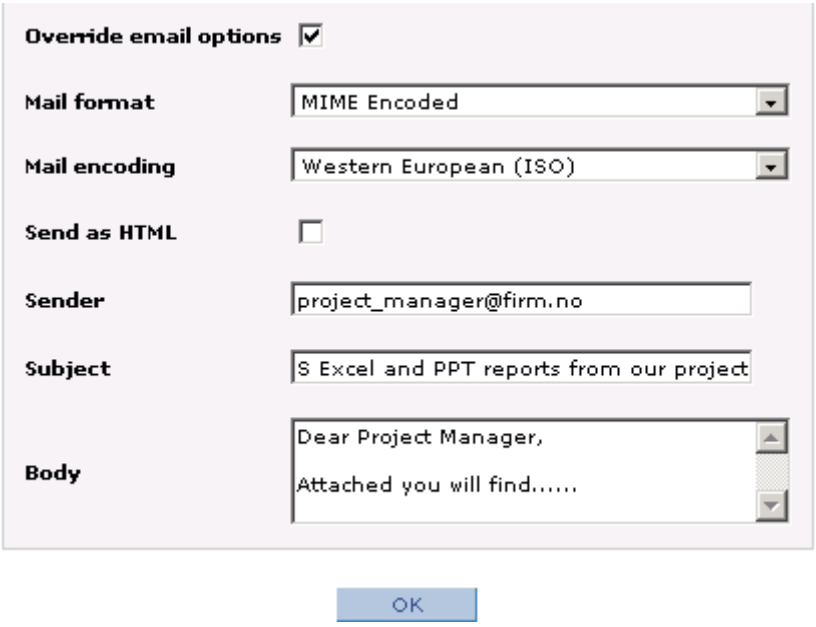


Figure 559 The Override Email options

The charts in PowerPoint reports are saved as pictures. This means that it is not possible to make any changes to ordered PowerPoint reports. If you wish to make changes to the charts in ordered reports, we recommend that you choose OLE in PPT before ordering the report, or order Excel report, make your changes and prepare a PowerPoint presentation afterwards.

20.6. How to Build a Crosstab

When a new crosstab is created within a report, the crosstab object includes two sub-folders:

- The **Crosstab**... folder where the vertical questions of the crosstab are included (the cars list in the figure below).

Test Driven Cars

Which cars have you test driven?

	Gender			
	Male		Female	
Volvo	21	53.8%	31	50.8%
Saab	19	48.7%	39	63.9%
BMW	22	56.4%	26	42.6%
Audi	22	56.4%	33	54.1%
Ferrari	16	41.0%	33	54.1%
Fiat	24	61.5%	25	41.0%
Total	39	317.9%	61	306.6%

Figure 560 Crosstab Table

- The **With...** folder where the horizontal questions of the crosstab are included (**Gender** in the figure above).

The folders with their contents appear, as shown in the figure below.

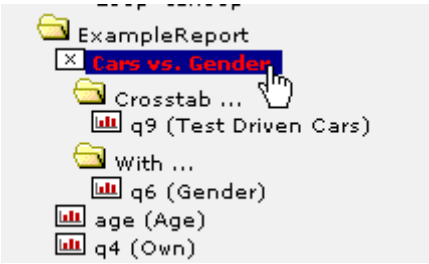


Figure 561 Crosstab: Cars vs.Gender

To build a crosstab, proceed as follows:

1. In the report tree, drag a **Crosstab** object from the **New Reporting Objects** folder and drop it into the report at the required location.
2. Right-click on the new Crosstab object and select **Properties**, or highlight the object and go to the **Item > Properties** menu command.
3. In the Properties window, set up the options such that the resulting tables and charts will be as required.
4. Save the changes.

Note: If you wish to use an Open Text question in a cross tabulation in reporting, remember that you must specify FieldWidth for this Open Text question in its Properties. FieldWidth for Open Text questions is the number of characters the respondent is allowed to enter in the text box.

Proceed as follows:

1. Double-click the Open Text question.
2. Go to **Properties**.
3. In the FieldWidth field, specify the number of characters you want to allow the respondent to enter.

If your survey is already running, or if the survey is closed, and you decide you need to use an Open Text question in a cross tabulation, do the following:

1. Enter your questionnaire.
2. Double-click the Open Text question.
3. Go to **Properties**.
4. In FieldWidth field, specify the number of characters you want to allow the respondent to enter.

Note: Remember that the FieldWidth now must correspond with the number of characters in the longest entry of the Open Text question. The entries that are longer than the specified FieldWidth, will be truncated, and you will lose data.

1. Go to **Product Management > Launch Survey**.
2. Choose one of the Generate database options and click **Launch Survey**.

   The Open Text question can now be used in cross tabulations in reporting.

20.7. Reporting on Loops

The easiest way of checking the answers in a Loop is to enter the **Forms** folder in the reporting tree.

1. To open the **Forms** folder, click on the folder icon.

   The routing opens as for the questionnaire tree.
2. Locate the loop you are interested in.

   As the sub-folders, condition trees and loops are all initially closed, the more background information on the questionnaire that you have, then the simpler this task will be.
3. Click on the **Loop** folder.

   When you click on the folder, the questions the Loop contains will appear. Double-click on a question to display the results for all iterations.

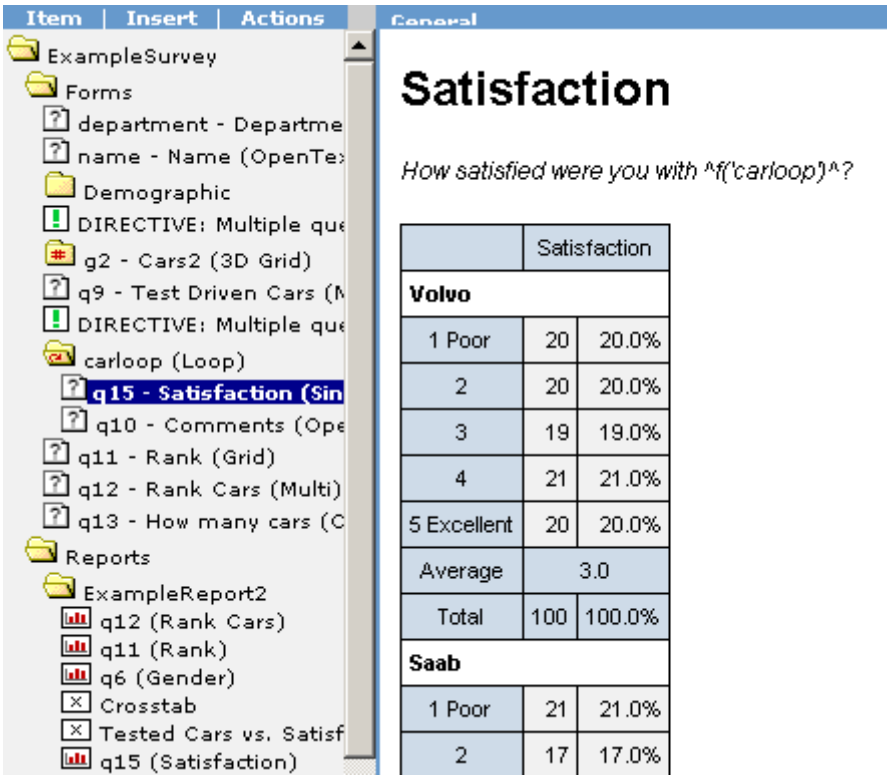


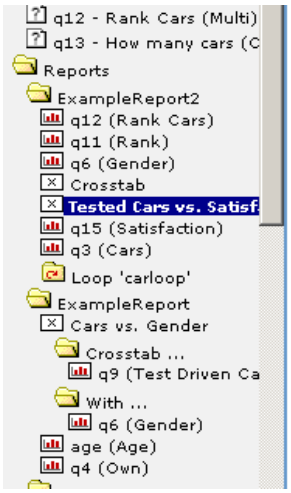
Figure 562 Example of the results for a loop question

Adding loops to reports.

To add a loop question to the report, click the loop folder in **Forms** to display all the questions in the loop. Select the question you wish to report on, then drag and drop it into the **Report** folder.

Loops in crosstabs.

To cross-tabulate the questions in the loop with the loop, insert a **New crosstab** into the Report. Insert the loop questions into the **Crosstab…** folder if you wish them to appear vertically and the loop folder into the **With…** folder if you wish the iterations to appear horizontally, or vice versa (go to Report Element Settings on page 432 for more information).



Satisfaction

How satisfied were you with ^f('carloop')^?

	Carloop											
	Volvo		Saab		BMW		Audi		Ferrari		Fiat	
1 Poor	20	20.0%	21	21.0%	24	24.0%	18	18.0%	17	17.0%	26	26.0%
2	20	20.0%	17	17.0%	19	19.0%	22	22.0%	25	25.0%	17	17.0%
3	19	19.0%	16	16.0%	17	17.0%	25	25.0%	26	26.0%	14	14.0%
4	21	21.0%	23	23.0%	20	20.0%	10	10.0%	20	20.0%	24	24.0%
5 Excellent	20	20.0%	23	23.0%	20	20.0%	25	25.0%	12	12.0%	19	19.0%
Average	3.0		3.1		2.9		3.0		2.9		2.9	
Total	100	100.0%	100	100.0%	100	100.0%	100	100.0%	100	100.0%	100	100.0%

Figure 563 Example of a Loop in a crosstab

20.8. 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.

20.8.1. 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.

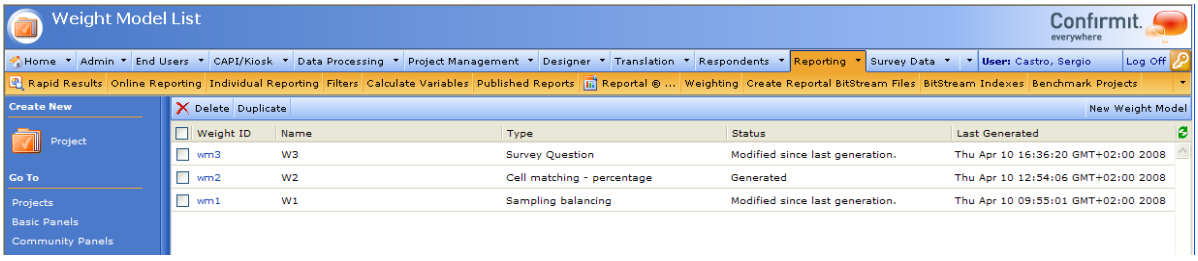


Figure 564 Example of the Weight Model List

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.

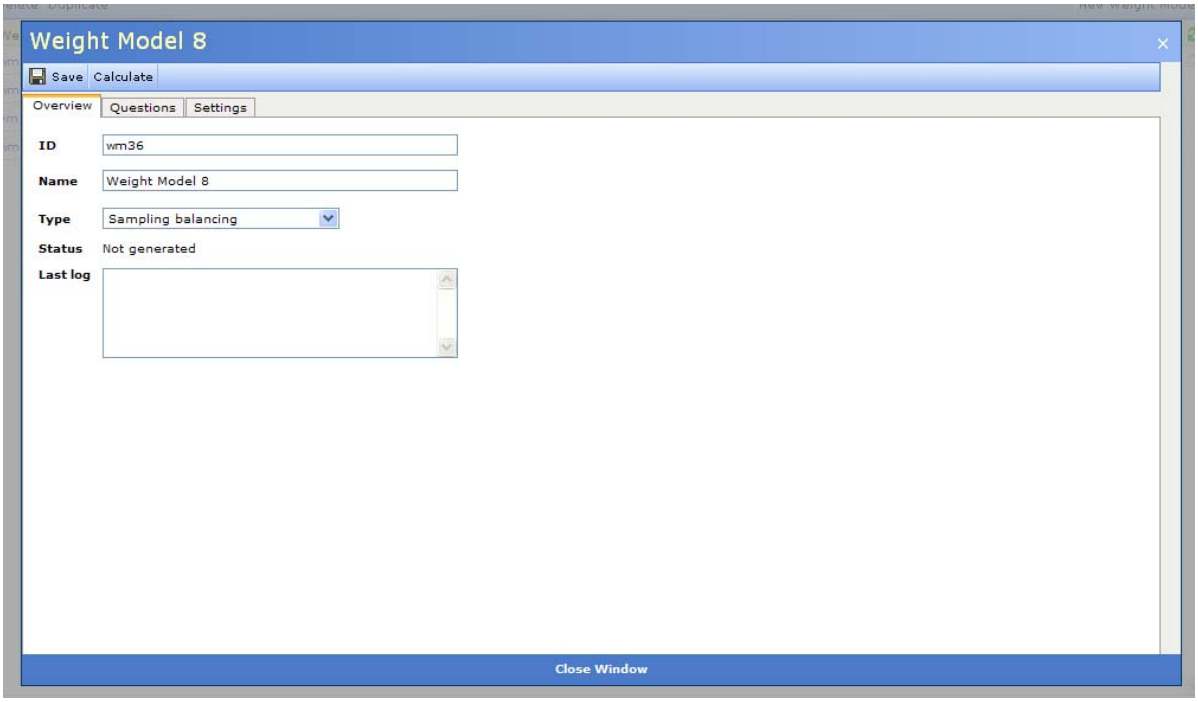


Figure 565 The Weight Model page

On this tab you define an ID and a Name as required (go to The Weight Model > Overview Tab Properties on page 419 for more information). The system will define an ID by default; this can be changed as required.

3. On completion, 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.

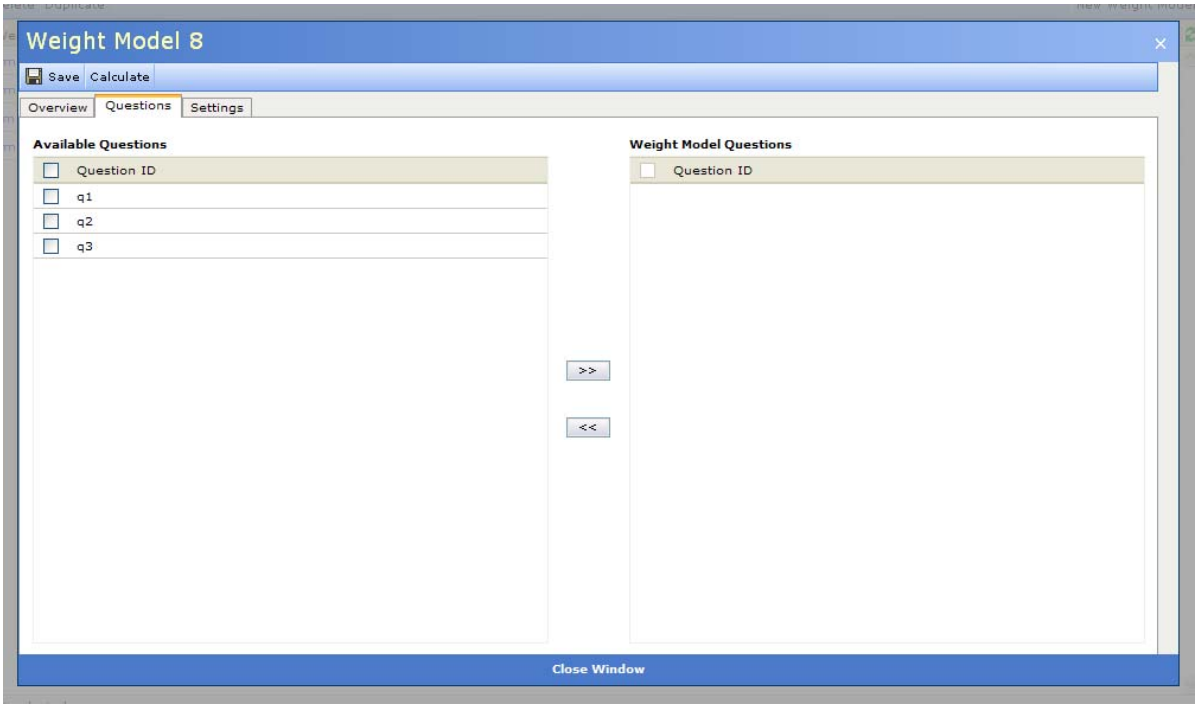


Figure 566 Example of the Questions tab

4. 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.

5. On completion, go to the Settings tab.

   The options on this tab will depend on the Type selected on the Overview tab.

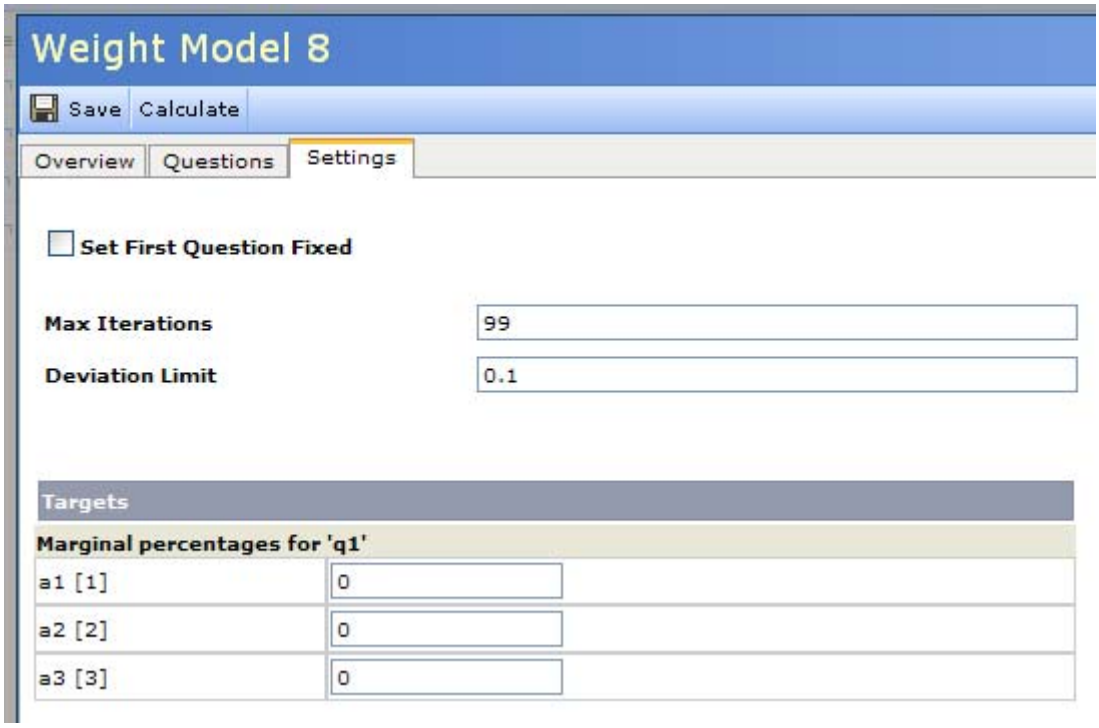


Figure 567 The Settings tab when Sampling Balancing is the selected Type

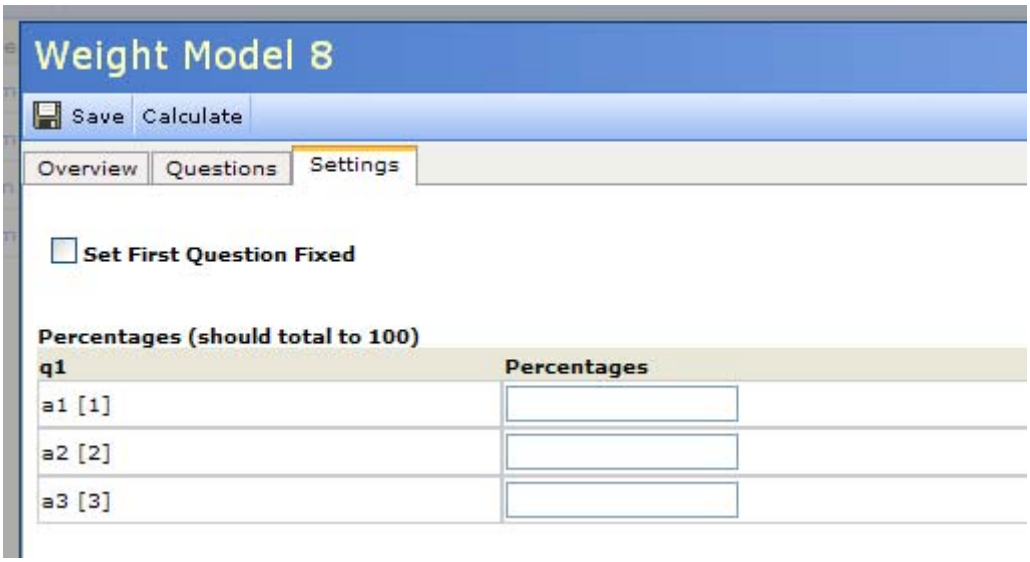


Figure 568 The Settings tab when Cell Matching - Percentage is the selected Type

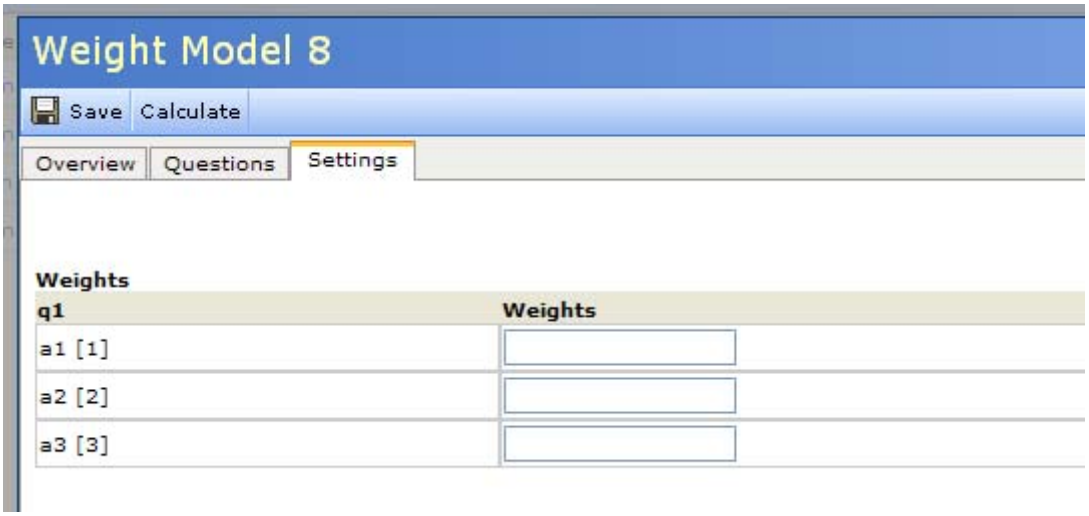


Figure 569 The Settings tab when Cell Matching - Weight is the selected Type

If the Survey Question type is selected, there are no further settings to make.

6. Add the appropriate values to the fields in the Settings tab, then click **Save** to save the changes.
7. Click the **Calculate** button in the window toolbar to open the Calculate Weights dialog.

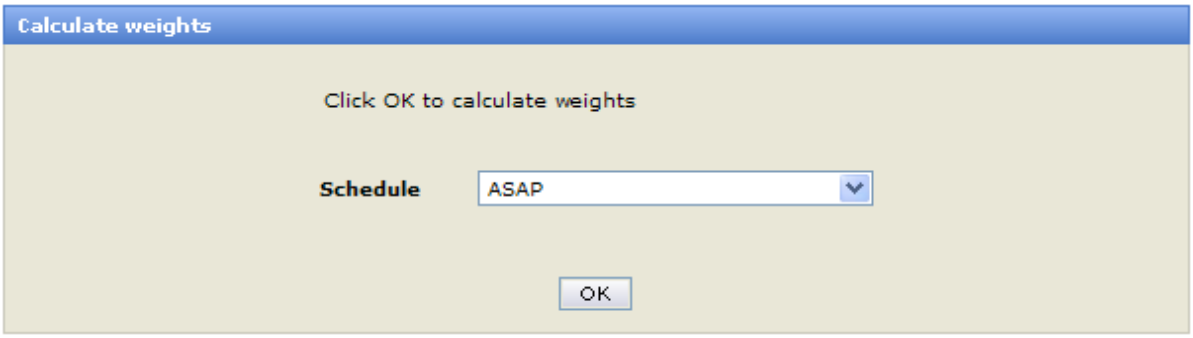


Figure 570 The Calculate Weights dialog

8. 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 (go to The Task Properties Recurrence Tab on page 36 for more information). Here you can set up the task to run at a specific date and time, and/or repeat as required.
9. On completion, click **Close Window** (located towards the lower edge of the Weight Model page) to return to the Weight Model List.

20.8.1.1. 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:

- **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.
- **Cell matching - percentage -** used for weighting along multiple dimensions when all the matrix cell percentages are known. For example, it is known that 20% are male with cars, 10% are male without cars, 40% are female with cars, 30% are female without cars. From these facts, the weights can be calculated by dividing the sample percentages by the reference percentages. Note that the percentage values entered must total to 100%.
- **Cell matching – weight -** with this method all the weights are entered directly and not calculated by comparing a reference with the sample. The method may for example be used if the weights are calculated by another system.
- **Survey Question -** this method provides the user with the ability to directly use weight factors stored in a survey question for each respondent, instead of factors resulting from the other weight model types. The weight factors can for example be imported into a hidden question in the response data set. This gives the ability to calculate weight factors outside Confirmit and apply them directly to reports in Online Reporting or 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.

20.8.1.2. 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 weight than the data set as a whole. Check this box to keep the first question with fixed values (go to Weighting Different Sub-samples Separately on page 420 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.

20.8.2. 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:

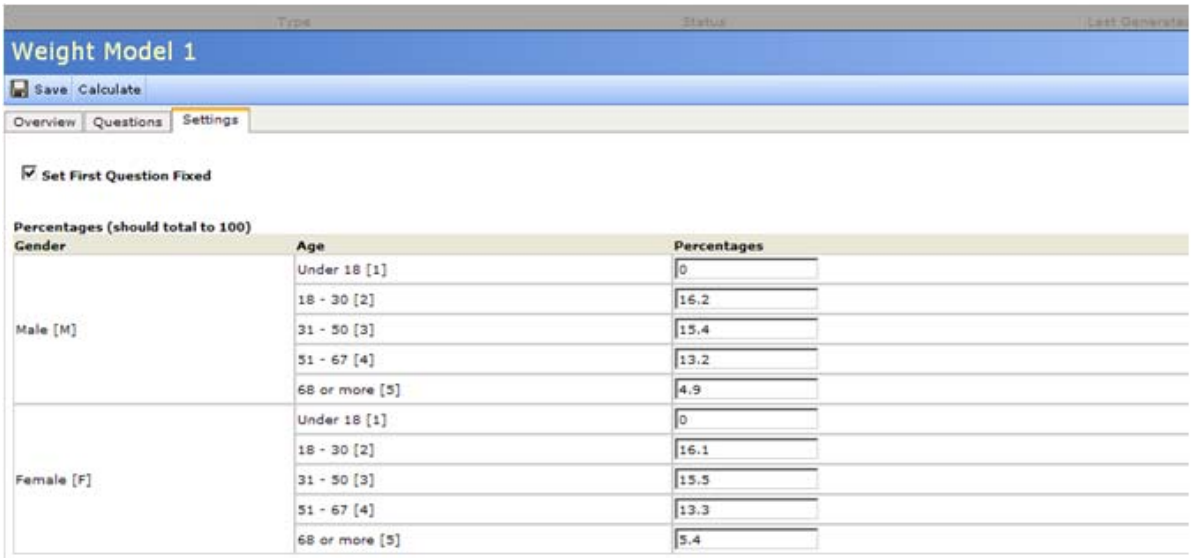


Figure 571 Distribution targets

Note: Under 18s have been screened in the example survey.

When reporting on this survey, we will be looking at results per month. In the survey there is a "month" question where the month of the response is set. This question will be used to indicate the sub samples to which the weighting should be applied. We want to apply weights to achieve the same distribution on gender and age for each month.

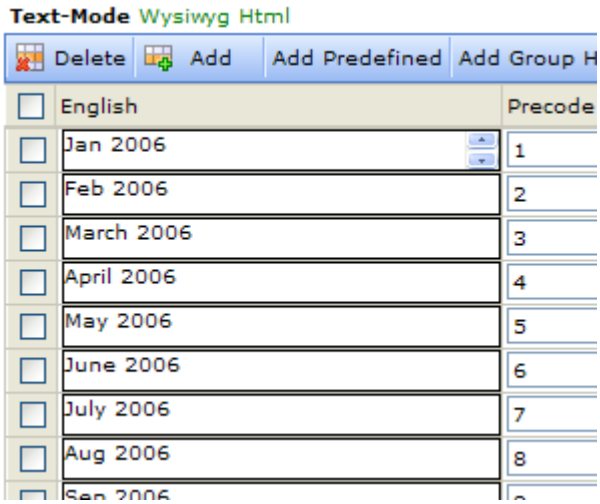


Figure 572 Extract from the answer list of the month question

In the weight model, month will then have to be included as the first object:

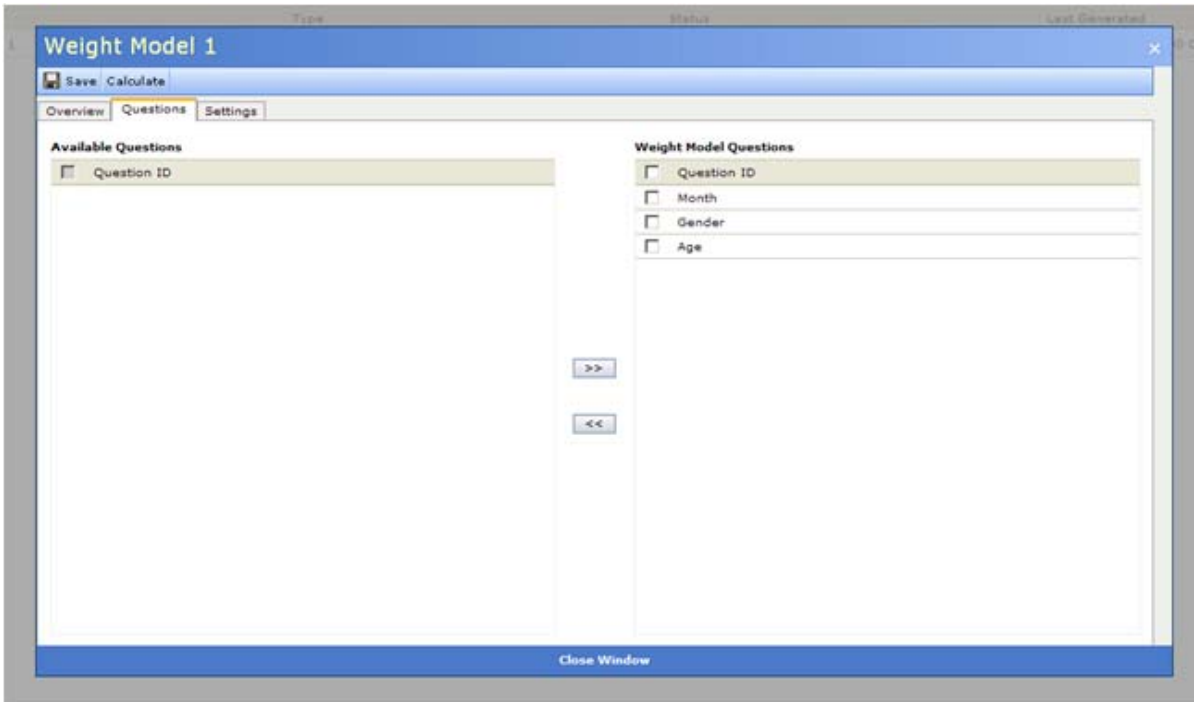


Figure 573 Weight model order of questions selected

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 precodes (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.

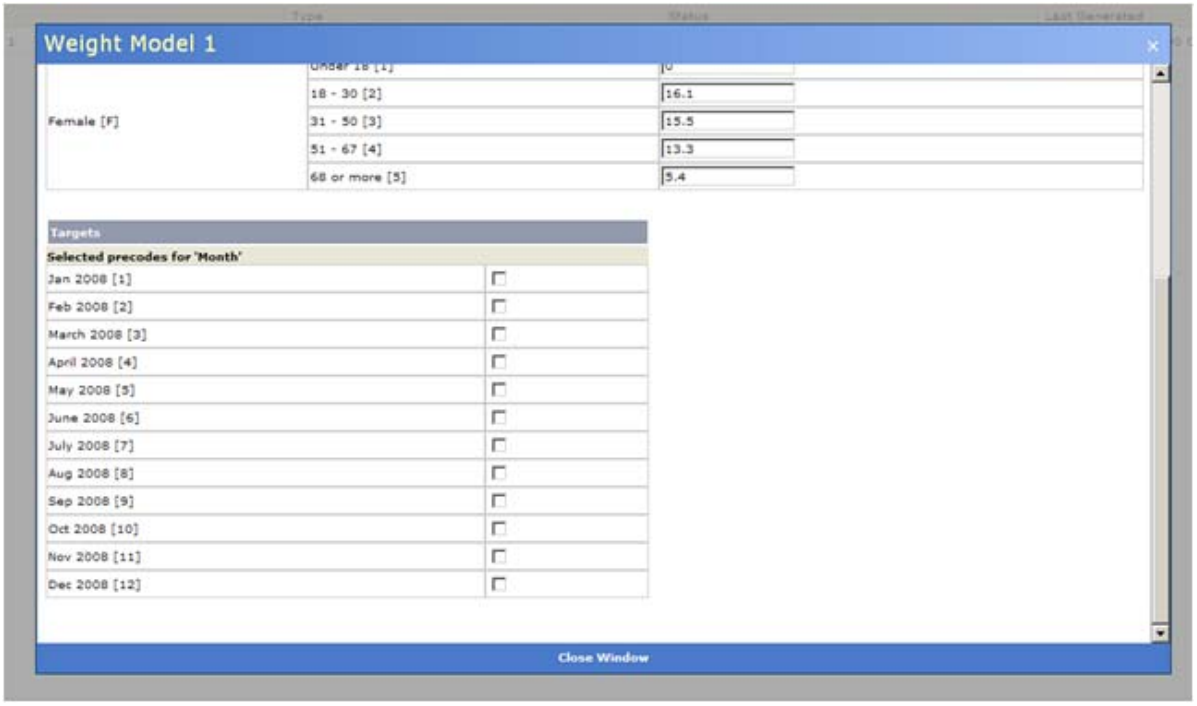


Figure 574 Set active precodes in the "fixed question", month

When calculating a weight model with a "fixed question", you can select one of three options:

- Calculate weights for all of the precodes selected.

- Calculate weights for a subset of them (only specific precodes).
- Calculate weights for those precodes that have been activated since the last weight calculation (only new precodes), keeping the existing weights for the other precodes.

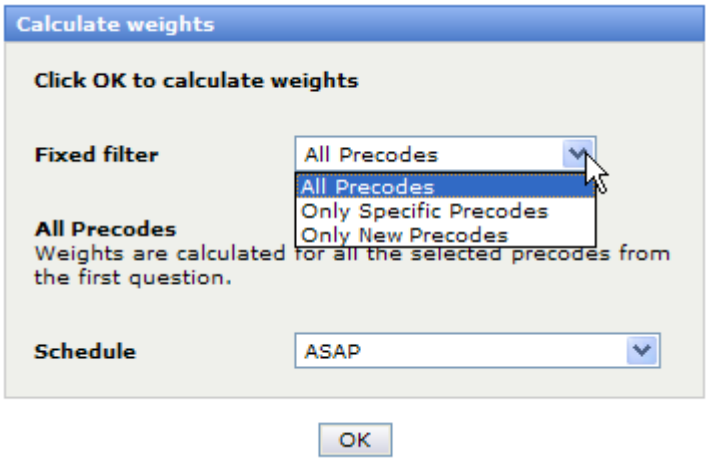


Figure 575 Select which precodes the weights are to be calculated for in the "fixed question"

20.9. Time Series

Use time series to create trend reports.

1. Go to the **Reporting > Online Reporting** menu command.
2. In the questionnaire tree column, drag a new **Timeseries** object from the **New Reporting Objects** folder and drop it into the report, for example within a crosstab.
3. Select the new Timeseries object and go to the **Item > Properties** menu command, or right click the object and select **Properties** from the menu, to open the Timeseries Properties dialog.

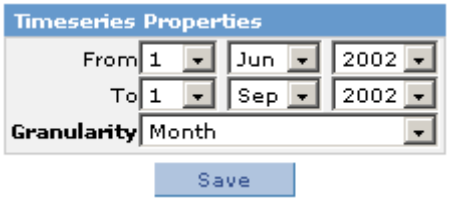


Figure 576 The Timeseries properties

4. Configure the time series with granularity and start/end points (day, week, month, quarter, year).

Time series may be used in cross tabulations or as a stand-alone report item.

	Months					
	Jan 2000		Feb 2000		Mar 2000	
1 Poor	31	15.2%	55	19.9%	28	23.3%
2	47	23.0%	58	21.0%	25	20.8%
3	47	23.0%	43	15.6%	22	18.3%
4	34	16.7%	49	17.8%	23	19.2%
5 Excellent	45	22.1%	71	25.7%	22	18.3%
Total	204	100.0%	276	100.0%	120	100.0%

Figure 577 Example of a Timeseries Crosstab

20.10. Filters

You can create and apply filters for online reports, at the Global level (all reports based on a project will be filtered), and the Report level (only the selected report will be filtered, and at the Element level (only the selected element within a report will be filtered).

Note: This functionality will not be available for projects using the Optimized database format. The functionality is included in and superceded by Reportal. Refer to the Reportal User Guide for further information.

20.10.1. Defining Filters

There are two basic ways to define a filter:

- Within Online Reporting, via the reporting tree (go to Defining Filters in the Reporting Tree on page 424 for more information).
- Via the **Reporting > Filters** menu command (go to Defining Filters in the Reporting Menu on page 425 for more information).

The procedures vary depending on the type of question you wish to filter on. If you activate the filters in the list of filters, they will be applied to globally to all reports based on the project. If you do not activate the filters in the list, you may apply them to reports on report level and on report element level.

20.10.1.1. Defining Filters in the Reporting Tree

This procedure describes how to create a new filter for a single question, by working in the reporting tree. The example assumes the filter is to show the data only from male respondents.

To define a Filter in the reporting tree, proceed as follows:

1. In the Confirmit main menu, go to the **Reporting > Online Reporting** menu command.

   The Online Reporting window opens.

2. In the questionnaire tree column, double-click on the **Forms** folder to open it and then select the question to be used as the filter.

3. In the questionnaire tree column menu bar, go to the **Actions > Add Filter** menu command

   The Filter Question dialog opens as shown below.

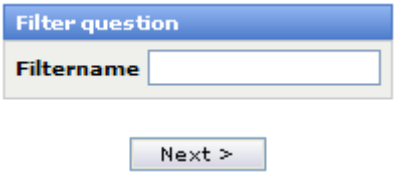


Figure 578 The Filter Question dialog

4. Type the name for your new filter into the Filtername field (for example **Male**), then click **Next**.

   The dialog changes to that shown below.



Figure 579 Defining the precodes to be used in the filter

5. Select the precodes that are to be allowed through the filter (in this example, as we want to see only the male data, check the **Male** box), then click **Save**.

   The filter is added to the list for the database.

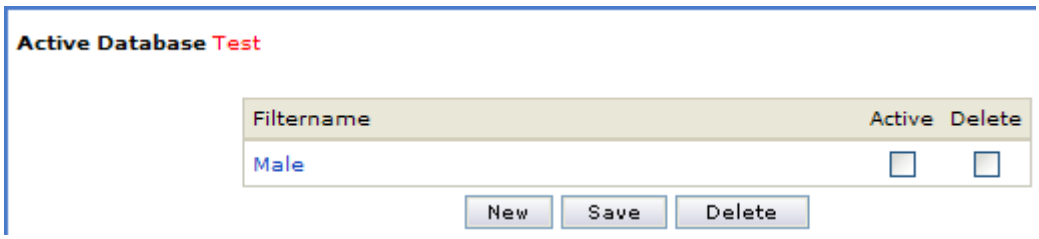


Figure 580 The list of filters for the Test database

You can now apply the filter globally, to the report or to an element in the report as required (go to Applying Filters on page 429 for more information)

20.10.1.2. Defining Filters in the Reporting Menu

This procedure describes how to create a new filter for a single question, by going through the **Reporting > Filters** menu command in the Confirmit main menu. The example assumes the filter is to show the data only from female respondents.

To define a filter, proceed as follows:

1. In the Confirmit window, select the project and go to the **Reporting > Filters** menu command.

   The list of existing filters in the database opens. Note that this will vary depending on the number of filters that have already been created.

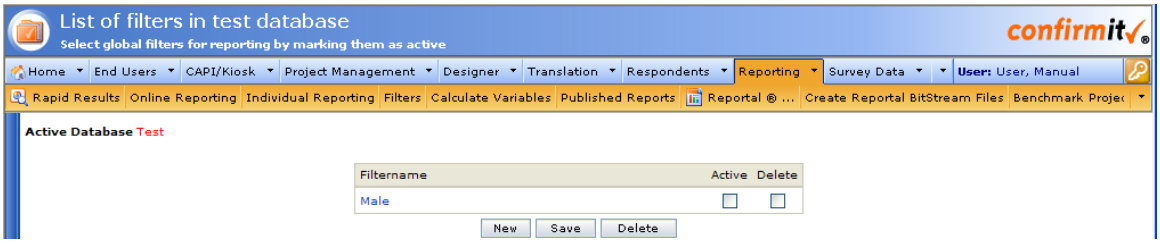


Figure 581 The list of filters that exist in the database

2. To create a new filter, click **New**.

   The Filter Question dialog opens.

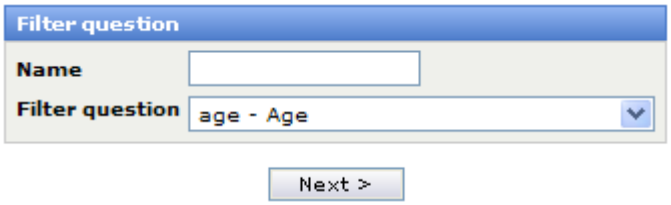


Figure 582 The Filter Questions dialog

3. Type a logical name for the filter into the Name field (in this case **Female**).
4. Click the down-arrow beside the Filter Question field to open a drop-down list of the questions in the project, and select the question you wish to use (in this case the **Gender** question).

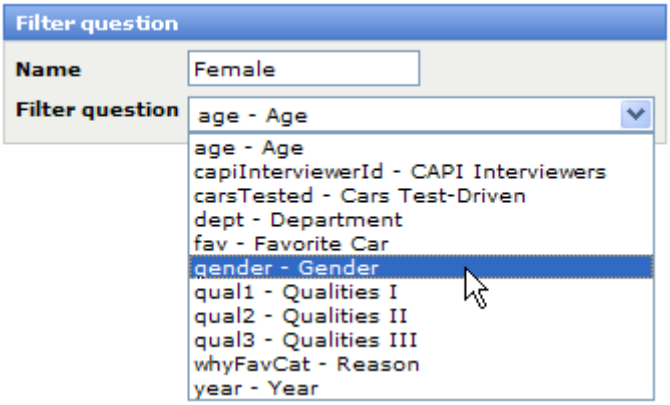


Figure 583 Selecting the question to be used for the filter

5. Click **Next**.

   The dialog changes to that shown below.



Figure 584 Defining the precodes to be used in the filter

6. Select the precodes that are to be allowed through the filter (in this example, as we want to see only the female data, check the **Female** box), then click **Save**.

   The filter is added to the list for the database.

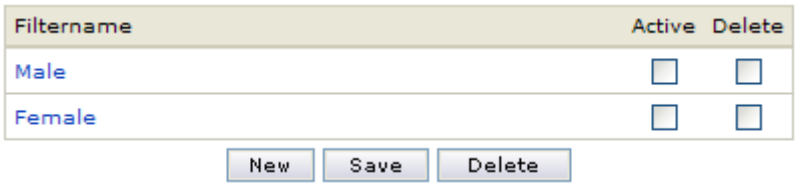


Figure 585 The list of filters available for the database

You can now apply the filter globally, to the report or to an element in the report as required (go to Applying Filters on page 429 for more information).

20.10.1.3. Defining Filters for Multi Questions

The filter examples described in the previous sections are based on single questions. If you choose a Multi question for a filter, a dialog box such as that shown below opens. If the Multi question is an ordinary Multi question, and you for example want to see results only for respondents who have test-driven German cars, then tick the checkboxes for the applicable answer alternatives in the *Use* column, and ignore the *Operator* and *Value* columns.

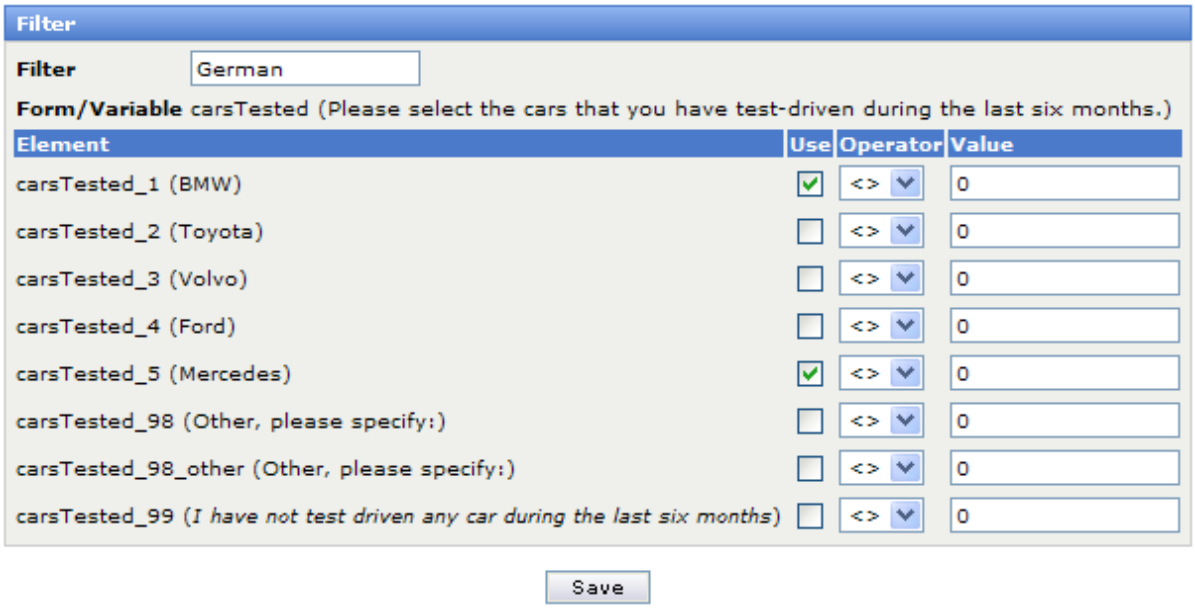


Figure 586 Editing Answers for a Multi Question Filter

However, if the Multi question you are using for the filter is an Ordered Multi question, you must specify which answer alternatives you want to use for the filter and which rank values should be filtered on.

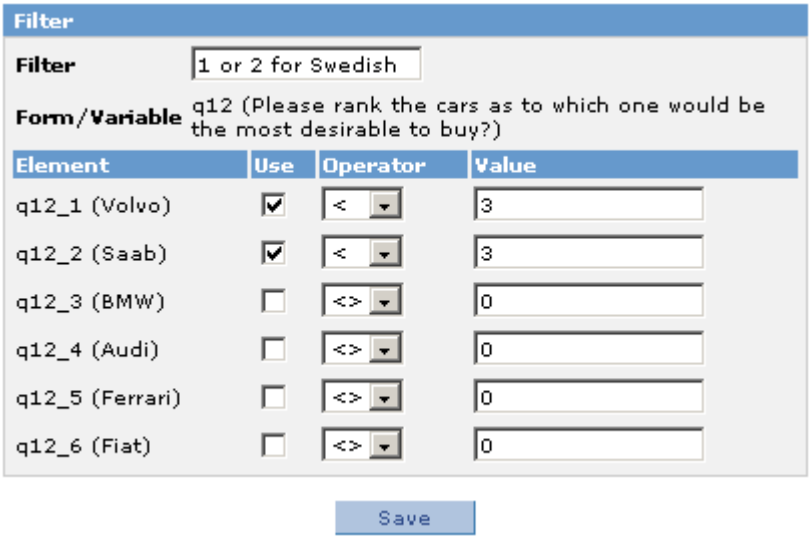


Figure 587 Editing Answers for an Ordered Multi Question Filter

Make the appropriate settings and click **Save**. The example above will show the results only for respondents who have ranked Volvo and Saab as the first two most desirable cars to buy. You can now apply the filter globally, to the report or to an element in the report as required (go to Applying Filters on page 429 for more information).

20.10.1.4. Defining Filters For Grid Questions

If you wish to use a Grid question for a filter, then after naming the filter and selecting the question (go to Defining Filters in the Reporting Menu on page 425 for more information), you must choose the variable from the grid that you wish to use in the filter. The dialog opens as shown in the example below.

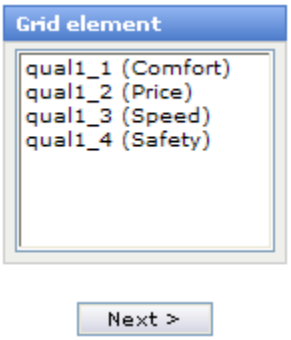


Figure 588 Specifying the grid element to be used

1. Click on the required grid element to select it, then click **Next**.

   A dialog as shown in the example below opens.

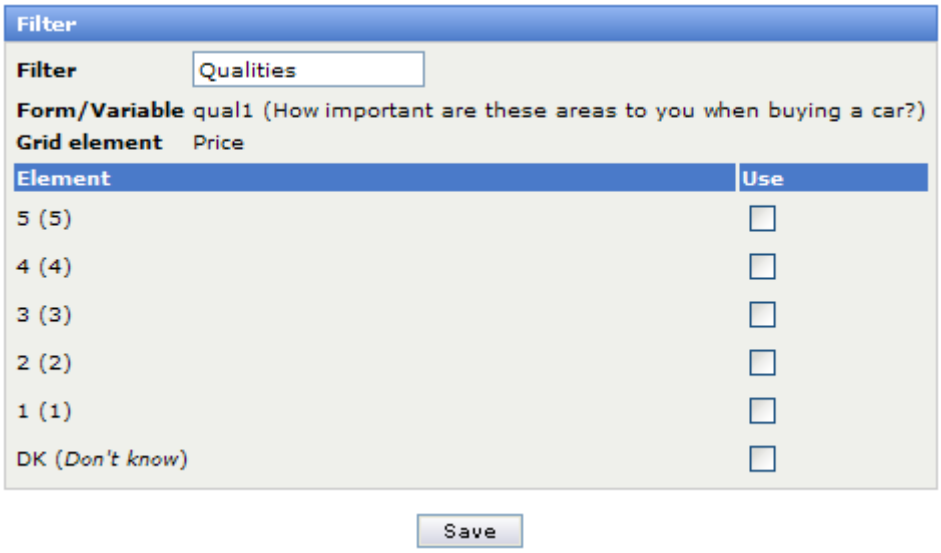


Figure 589 Selecting the answers for a grid question

2. Click in the Use boxes for those scale elements you wish to use.
3. Click **Save**.

   The filter is added to the list for the database. You can now apply the filter globally, to the report or to an element in the report as required (go to Applying Filters on page 429 for more information).

20.10.2. Applying Filters

Filters can be applied:

- **Globally** - the filter will be applied to all reports created from the selected project.
- **On the report level** - the filter will be applied to the selected report.
- **On the report element level** - only the selected question in the report will have the filter applied. All other questions will not be filtered.

To apply a filter:

- **Global filters** - open the project and go to the **Reporting > Filters** menu command. The List of Filters window opens for the database as shown in the figure below. In the list, check the **Active** box for the required filter(s) and click **Save**. The selected filters will be applied to all reports created from the selected project.

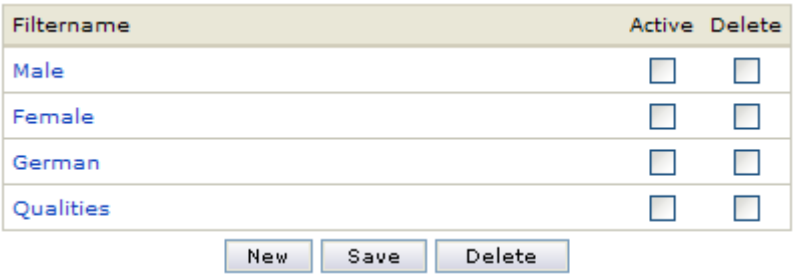


Figure 590 Example of a filter list when applying the filters globally

- **Report level filters -** open the project and go to the **Reporting > Online Reporting** menu command. In the questionnaire tree column, select the report, right-click on it and select **Properties** from the drop-down menu (or go to the **Item > Properties** menu command). The Properties window now includes the list of available filters, as shown in the example below. Check the appropriate box to apply the filter and click **Save** to save the changes.

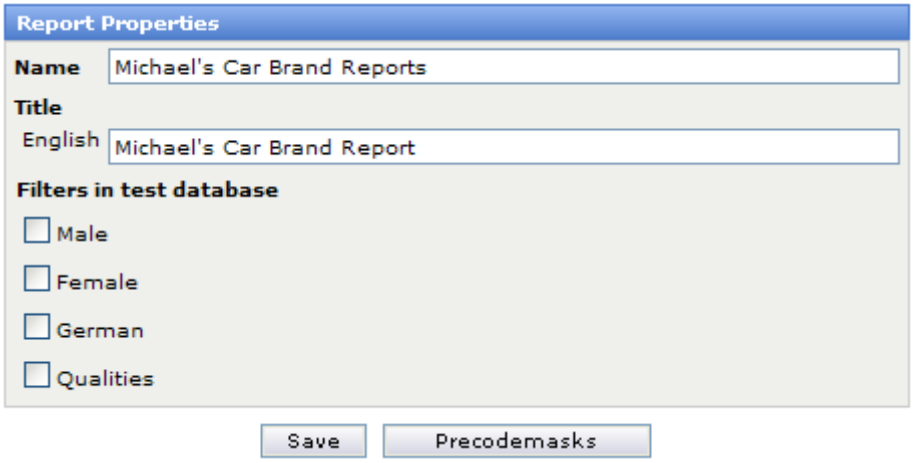


Figure 591 Example of a report's Properties page with the available filters listed

- **Element level filters -** open the project and go to the **Reporting > Online Reporting** menu command. In the questionnaire tree column, click on the report to open it, then select the question you wish to apply the filter to. The Report Node Options dialog opens at the General tab. Go to the **Filter** tab; the dialog changes to that shown below. Check the appropriate box to apply the filter and click **Save** to save the changes.

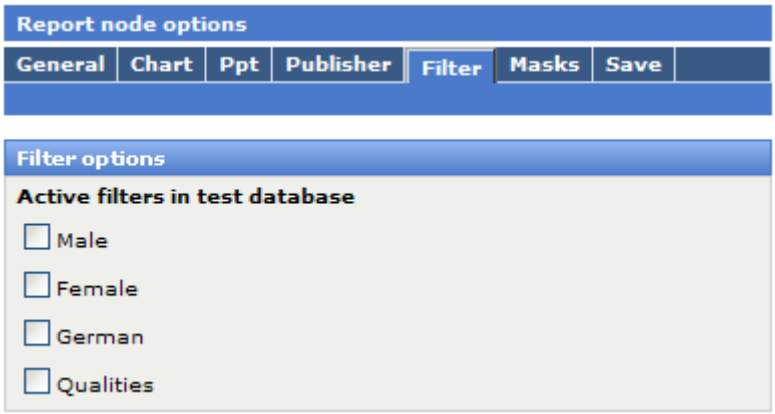


Figure 592 Example of the Filter tab for a question within a report

20.11. Settings

The settings frame in the reporting screen includes a number of settings for the reporting environment.

20.11.1. General Settings

The settings frame in the reporting screen includes the following general settings for the entire reporting environment. Every time you make any changes in the General Settings you must click the **Save** button to update the settings.

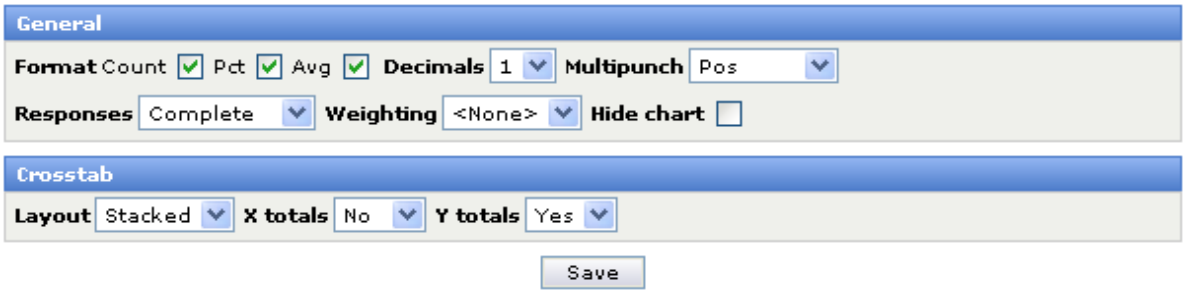


Figure 593 The General settings frame

The properties and fields on this screen are as follows:

- General area
  - **Format** - Indicates whether count, percent, and/or average should be displayed. Average can only be displayed for weighted single punch or grid questions (go to Answers on page 153 for more information).
  - **Decimals** - specify the number of decimal places to be used in average and percent format.
  - **Responses** - By default set to show only complete interviews, but can also show only incomplete interviews or both complete and incomplete.
  - **Multipunch** - **Pos** - Shows only numbers of positive answers for a multi punch. **Pos + Neg** shows numbers of positive and negative answers for a Multi question (answered/not answered). **Ordered** shows an ordered multi punch split in ranking.
  - **Weighting** - <None> or one of the defined Weight models
  - **Hide chart** - Use this check box to show only tables in the report frame.
- Crosstab area
  - **Layout** - **Stacked -** The questions in the **"With..."** folder are stacked. Select **Nested**, the questions in the **"With..."** folder are nested.
  - **X totals** - Set this to **Yes** to get the totals for a question to the right of the rest of the crosstab.
  - **Y totals** - Set this to **Yes** to get the totals for a question under answer alternatives.

Own

Which car do you own?

	Gender				Age					
	Male		Female		25-34		35-44		45-54	
Volvo	8	17.8%	11	20.0%	6	35.3%	1	5.9%	2	12.5%
Saab	4	8.9%	3	5.5%	2	11.8%	0	0.0%	1	6.3%
BMW	7	15.6%	9	16.4%	4	23.5%	2	11.8%	0	0.0%
Audi	9	20.0%	10	18.2%	2	11.8%	8	47.1%	4	25.0%
Ferrari	10	22.2%	10	18.2%	1	5.9%	4	23.5%	5	31.3%
Fiat	7	15.6%	12	21.8%	2	11.8%	2	11.8%	4	25.0%
Total	45	100.0%	55	100.0%	17	100.0%	17	100.0%	16	100.0%

Figure 594 Example of a stacked crosstab

Own

Which car do you own?

	Male						Female					
	25-34		35-44		45-54		25-34		35-44		45-54	
Volvo	3	25.0%	1	12.5%	0	0.0%	3	60.0%	0	0.0%	2	22.2%
Saab	2	16.7%	0	0.0%	1	14.3%	0	0.0%	0	0.0%	0	0.0%
BMW	4	33.3%	0	0.0%	0	0.0%	0	0.0%	2	22.2%	0	0.0%
Audi	1	8.3%	4	50.0%	2	28.6%	1	20.0%	4	44.4%	2	22.2%
Ferrari	1	8.3%	3	37.5%	2	28.6%	0	0.0%	1	11.1%	3	33.3%
Fiat	1	8.3%	0	0.0%	2	28.6%	1	20.0%	2	22.2%	2	22.2%
Total	12	100.0%	8	100.0%	7	100.0%	5	100.0%	9	100.0%	9	100.0%

Figure 595 Example of a nested crosstab

20.11.2. Report Element Settings

All of the general settings for a report (go to General Settings on page 430 for more information) can be overridden by setting properties for individual elements within the report. For an element to have individual settings, the element must be either a crosstab or a simple question.

To specify individual settings on an element:

1. In the report tree, open a report and select a report element.
2. Go to the **Item > Properties** menu command or right click the element and choose **Properties** from the menu.

   The Report Node Options screen opens at the General tab (go to The Report Node General Tab on page 432 for more information), and a number of additional properties become available. These are described in the following sections.

20.11.2.1. The Report Node General Tab

When you right-click on an element in a report and select **Properties**, or select the element and go to the **Item > Properties** menu command, the Report Node Options screen opens at the General tab.

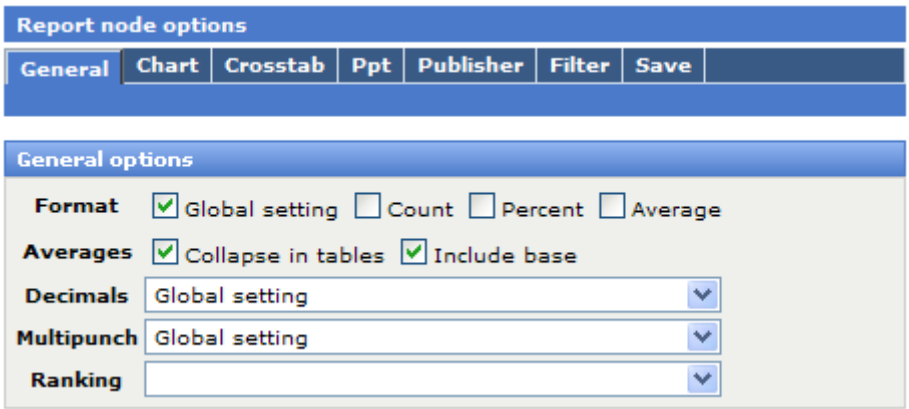


Figure 596 The Report Node General tab

The properties and fields available on this tab are as follows:

- Format

  - **Global setting** - the report element will use the settings specified for the report (go to General Settings on page 430 for more information).
  - **Count** - the report element will display counts.
  - **Percent** - the report element will display percentages.
  - **Average** - the report element will display averages.
- Averages
  - **Collapse in tables** - shows the number of respondents together with the average. Normally used together with *Include base* to achieve the desired effect.
  - **Include base** - includes the number of respondents in addition to the average. Normally used together with *Collapse in tables* to achieve the desired effect. *Include base* causes the n=50 to be displayed.
- **Decimals** - specify the number of decimal places to be used in average and percent format.
- **Multipunch** - **Pos** shows only numbers of positive answers for a multi punch. **Pos + Neg** shows numbers of positive and negative answers for a Multi question (answered/not answered). **Ordered** shows an ordered multi punch split in ranking.
- **Ranking** - you may choose in which order the table elements are to be displayed, based on their frequency.

If you make any changes to these settings, on completion click **Save**.

If you select **Excel** as the chart component in User Settings (go to User Settings on page 120 for more information), then an additional property appears in the General tab.

- **Display - Categorized** - only for Open Text Questions with Fixed Field Width. This setting is by default chosen. When not chosen, the data will be displayed for each respondent (go to The Chart Tab on page 433 for more information).

20.11.2.2. The Chart Tab

This section shows the properties and fields that become available if you select **Excel** as the chart component in User Settings (go to User Settings on page 120 for more information).

Note that one property is added to the General tab as shown below (go to The Report Node General Tab on page 432 for more information).

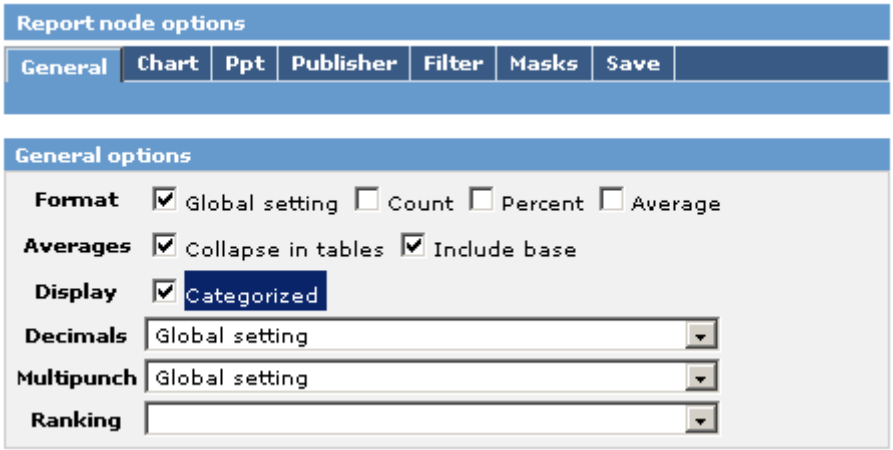


Figure 597 The General Report Node Options

- **Display - Categorized** - only for Open Text Questions with Fixed Field Width. This setting is by default chosen. When not chosen, the data will be displayed for each respondent.

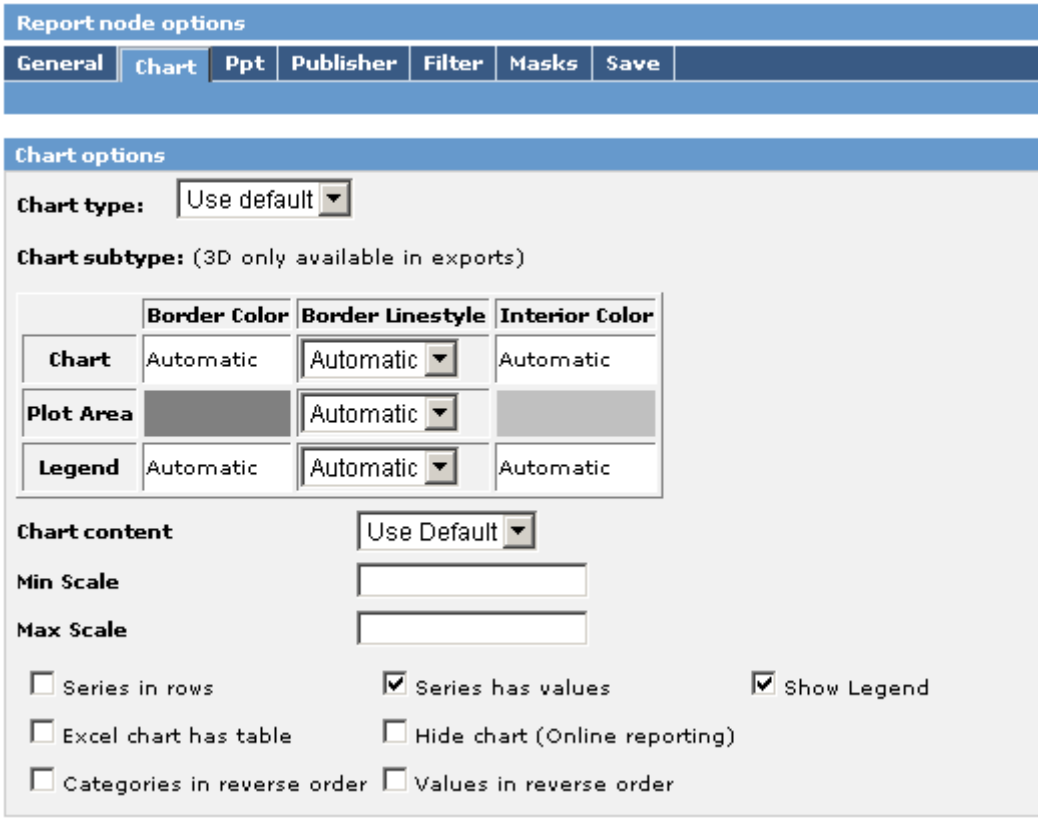


Figure 598 The Chart options for the Excel Chart Component

The properties and fields in the Chart tab are as follows:

- **Chart type** - defines the chart type to be used. The most normal chart types such as bars, pies, lines and areas are supported.
- **Chart Subtype**
  - **Border Color** - (chart and legend) The default border color of charts and legends is set to be black. The changes are invisible in Confirmit. Nevertheless, they will be activated when ordering or publishing the report. Double-click on the fields in order to activate the Color Selection.
  - **Border Linestyle** - (chart, plot area, legend) The changes are invisible in Confirmit. Nevertheless, they will be activated when ordering or publishing the report.
  - **Interior Color** - (chart and legend) double-click on the fields to activate the Color Selection.
- **Chart content** - indicates whether count, percent, and/or average should be displayed. Average can only be displayed for weighted single punch, grid questions, questions with numeric answers, and float questions (go to Answers on page 153 for more information).
- **Min Scale** - indicates the minimum value on a scale.
- **Max Scale** - indicates the maximum value on a scale.
- **Series in rows** - the graphical representations of the categories, for example bars or columns are placed next to each other, each category having its own legend.
- **Excel chart has table** - the changes are invisible in Confirmit. Nevertheless, they will be activated when ordering or publishing the report.
- **Categories in reverse order** - check this box to display the categories in the chart in reverse order compared to the table; for example male – female in the table, but female – male in the chart
- **Series have values** - table values of each category are explicitly specified in the chart.
- **Hide chart (Online reporting)** - check this check box to hide the charts in the report frame.

- **Values in reverse order** - check to display the values in the chart, i.e. count, percent or average, in reverse order.
- **Show legend** - check this box to specify that you wish the legend to be displayed in the chart.

20.11.2.3. The PowerPoint Tab

This tab contains the settings to be applied when the report is exported to PowerPoint. PowerPoint options can be edited in all project languages simultaneously. When you order a report, it will be supplied in the language you have specified in your User Settings (go to User Settings on page 120 for more information).

If you have edited Report Publisher options prior to editing Power Point options, you can copy Publisher Header texts and Texts into your Power Point presentation by clicking the **Copy Publisher texts** button.

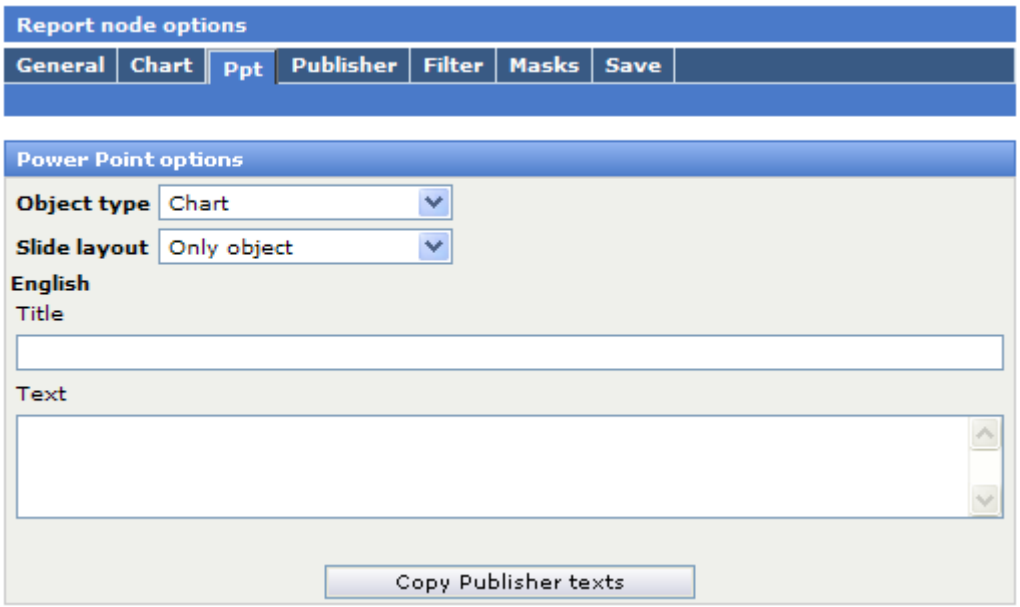


Figure 599 PowerPoint options

The properties and fields in this tab are as described below:

- **Object type -** choose between **Table** and **Chart** as the PowerPoint object.
- **Slide layout:**
  - **Only text -** only text is shown in the PowerPoint slide.
  - **Only object -** only object is shown in the PowerPoint slide.
  - **Object left/Text right -** the object (table or chart) is in the left of the slide and the text is in the right of the slide.
  - **Text left/Object right -** the text is in the left of the slide and the object is in the right of the slide.
- **Title** - the header text in a PowerPoint slide. This text can also be set to give a name to a crosstab in the reporting tree.
- **Text** - the text in text frames in PowerPoint slides.
- **Copy Publisher Texts** - if you have typed texts into the Publisher tab's fields and wish to use the same texts for a PowerPoint export, click this button to copy the texts directly from the publisher tab into the corresponding fields in this tab.

20.11.2.4. The Publisher Tab

This tab contains the settings be used when the selected report page is to be published.



Figure 600 The Publisher tab

The fields in this tab are as described below:

- **Content**
  - **Both** - both the table and the chart are included on the report page.
  - **Only chart** - only the chart is included in the report page.
  - **Only table** - only the table is included in the report page.
  - **None** - hides both the table and the chart from the report page. This allows you to include only text, creating for example an information page.
- **Title** - the title of the page when it is published.
- **Text** - type in any text you may wish to be presented on the report page.
- **Copy PowerPoint Texts** - if you have typed texts into the PowerPoint tab's fields and wish to use the same texts when publishing, click this button to copy the texts directly from the PowerPoint tab into the corresponding fields in this tab.

20.11.2.5. The Filter Tab



Figure 601 Example of the Filter tab

On this tab, check the box(es) to activate the corresponding filter(s) for the selected report element (go to Applying Filters on page 429 for more information).

20.11.2.6. The Masks Tab

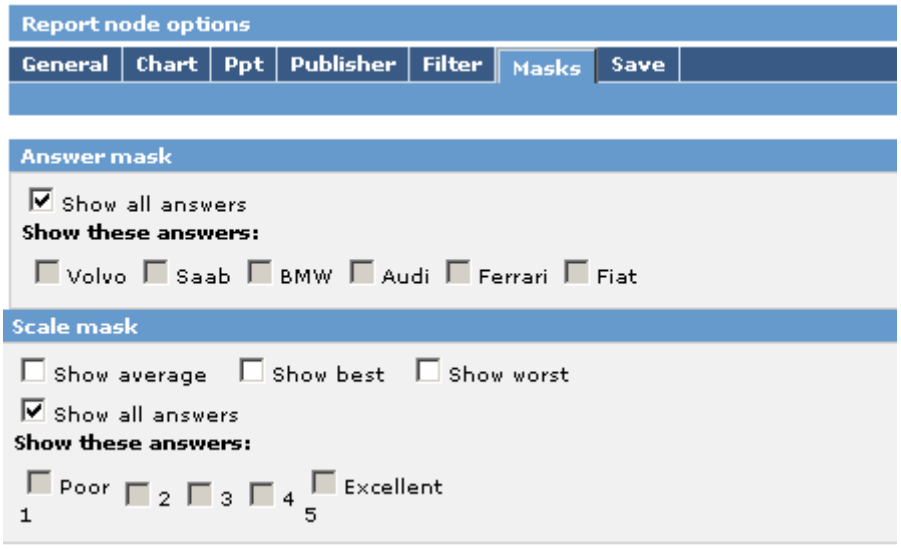


Figure 602 Example of the Masks tab

The checkboxes in this tab are as described below:

- **Show all answers -** check to display all answers/scales in the table/chart.
- **Show these answers -** check off specific answers/scales you want to be shown in the table/chart.
- **Show average -** check to show the average values of the variables. The answers/scales must be assigned values (go to Answers on page 153 for more information).
- **Show best -** used only for crosstabs and loops with single questions. Shows the best average value. When used it always shows the lowest number specified in the *Weight* as worst and the highest as best. Leave all other checkboxes empty when using *Show best*.
- **Show worst -** used only for crosstabs and loops with single questions. Shows the worst average value. When used it always shows the lowest number specified in the *Weight* as worst and the highest as best. Leave all other checkboxes empty when using *Show worst*.

20.11.2.7. The Crosstab Tab

In the event the selected report element is a crosstab, then an additional Crosstab tab becomes available.

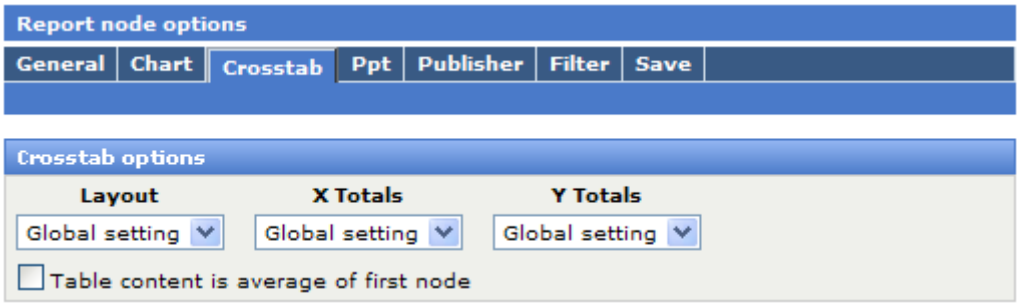


Figure 603 Example of the Crosstab tab options

The properties and fields in this tab are as described below:

- **Layout**
  - **Stacked -** the questions in the **With...** folder are stacked.
  - **Nested -** the questions in the **With...** folder are nested.

  - **Global setting** - the report element will use the settings specified for the report (go to General Settings on page 430 for more information).

- **X totals**
  - **On** - shows the totals for a question to the right of the crosstab table.
  - **Off** - hides the totals.
  - **Global setting** - the report element will use the settings specified for the report (go to General Settings on page 430 for more information).
- **Y totals**
  - **On** - shows the totals for a question under the answer alternatives.
  - **Off** - hides the totals.
  - **Global setting** - the report element will use the settings specified for the report (go to General Settings on page 430 for more information).
- **Table content is average of first node** - the contents are the average values of the first question in the *Crosstab…* folder. The variable must be weighted to get average values.

20.11.2.8. The Loop Tab

When a Loop element in the report is selected, an additional tab becomes available.

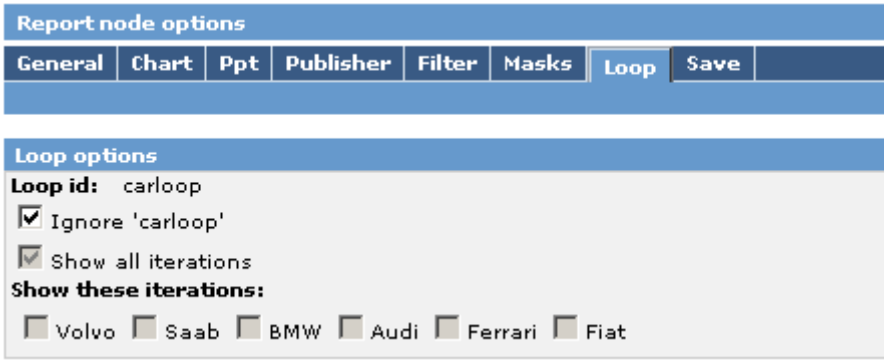


Figure 604 Example of the Loop tab

The checkboxes in this tab are as described below:

- **Loop id** - denotes the currently selected Loop element.
- **Ignore [loop id]** - this checkbox is available only for the questions in loops. If you check this box, the iterations will not be shown. It is therefore recommended that you uncheck the box when reporting on the loop questions alone. You may wish to check the box when cross-tabulating loops and loop questions so that iterations do not appear both vertically and horizontally.
- **Show all iterations** - check this box if you wish all iterations to be shown, or, uncheck this box and check individually in the next row the iterations you wish to report upon.
- **Show these iterations** - if you have not checked the Show all box above, check the boxes for the individual iterations that you wish to show.

20.12. Iterated Reporting

The iterated reporting functionality in Confirmit enables you to create multiple sets of reports for predefined groups of respondents and/or responses. The set of reports typically share the same layout and questions, but have separate sets of filters and masks for some of the questions.

For example:

Assume you are creating a survey to discover people's preferences when purchasing new cars. The survey is to ask a number of general questions that all respondents are to answer, including one question about which car types they have test-driven recently, and also a number of questions specific to the individual car types that the respondents have test-driven. You can then create an iterated report for each type of car, that will contain the general response data and the response data particular to that car type. For the type-specific questions, you can hide all the data concerning the other types (perhaps the reports are to be sent to the various car manufacturers).

Iterations can also be applied to pivot views (go to Pivot Views on page 458 for more information).

20.12.1. How to Create an Iterated Report - The General Procedure

To create an iterated report, proceed as follows.

1. Create the report/pivot view(go to Creating a Report on page 439 for more information).
2. Create an iterator and define the iterations (go to How to Create an Iterator and Define Iterations on page 439 for more information).
3. Assign the iterator to the report (go to Assigning an Iterator to a Report on page 443 for more information).
4. Assign the iterator filter/mask to report nodes/pivot views (go to Assign Iterator Filter/Mask to Report Nodes on page 444 for more information).
5. Order Office reports for the iterated report (go to Ordering MS Office Reports on page 446 for more information).
6. Publish the iterated report (go to Publishing an Iterated Report on page 448 for more information) and iterated pivot view (go to How to Publish a Pivot View on page 462 for more information).
7. Give users access to one or more iterations of a report (go to Connecting Users to Reports/Pivot Views on page 450 for more information).

20.12.2. Creating a Report

The creation of a report/pivot view is not explained in detail here as this is a subject of its own and is explained separately in the User documentation(go to Pivot Views on page 458 for more information). However, a few tips may be useful to enable the use of iterated reports or iterated pivot views.

An iterator is a folder object in the reporting menu. Only “scales and lists” objects may be dropped in the iterator folder and used to create iterators. All scales and lists in a project are therefore also available in the reporting tree.

If iterated reporting is to be used in a project, all answer lists and/or scales that are to be used as iterators must be created as predefined scales and lists and must also have been used in question(s) in the questionnaire tree.

20.12.3. How to Create an Iterator and Define Iterations

This procedure is based on a fictitious survey about cars. The procedure assumes you wish to create iterated reports where the response data for one particular report page is "car type specific" for European cars and where non-European cars are grouped in one report iteration.

To create the iterator, proceed as follows:

1. In the reporting tree, drag an Iterator object from the **New reporting objects** folder into the **Iterators** folder.
2. Drag the relevant list(s) from the **Scales and lists** folder into the new iterator (in the example, the Car Brands list is used).

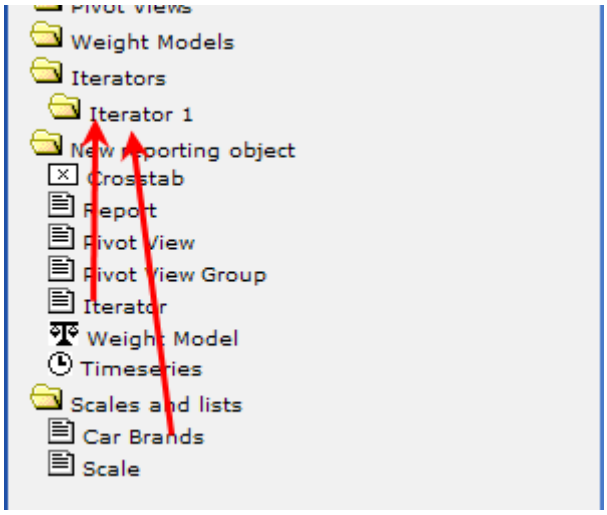


Figure 605 Creating the iterator

You can add iterator level filters and masks on questions within the report based on these lists.

3. Double-click the iterator object (here the Iterator 1 object), highlight it and go to the **Edit > Properties** menu command, or right-click the element and choose **Properties** from the menu.

   The Iterator Properties window opens. Here you can rename the iterator, and add, remove and modify the iterations. The figure below shows an example of the Iterator Properties window that includes the Car Brands list and has been renamed accordingly.

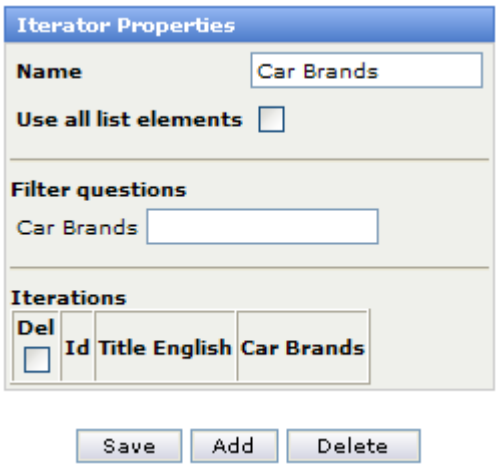


Figure 606 Example of the Iterator

The fields and buttons in the iterator window are as follows:

- **Name - the name of the iterator element in the reporting tree. To edit the name, click in the Name field and edit the text.**
- **Use all list elements** - check this box to make the iterator use all list elements as iterations. The iterator will create an iteration for each element in the list and it will not be necessary to specify the iterations. If you do not check the “Use all list elements” box, you will have to add iterations under the “Iterations” heading.
- **Deleted** - the iterator is soft deleted.
- **Filter questions** - shows (outside the data field) the scale or list that is to be used as the basis of the iterator. Type into the field the question ID of the question for which the respondent data is to be divided up by the iterator.
- **Iterations**

- **Del** - if you wish to delete an iteration, check this box for that iteration and click **Delete** below.
- **Id** - the Id of the iteration.
- **Title English** - the English title. Double-click in the field to enter titles in other languages.
- **The "list" column** - the table will include one column for each list/scale entered in the iterator. Use this column to enter the list element(s) that are to be included in the iteration. In the example above, only one list, “Car Brands” has been entered in the iterator, so the table includes only one "list" column.

- **Save** - saves any entered or changed settings.
- **Add** - add an iteration row.
- **Delete** - to delete an iteration, check the box beside that iteration and click **Delete**.

As scale and list objects are used in the iterators, the questions to be used as the basis for the iterations must be specified. Note that these must be questions in which the “Car Brands” list has been used.

4. Give the iterator object a logical name.
5. In the Filter Questions field, enter the question ID of the question that is to be divided up by the iterator. In this example, the qID is **carsTested**.

To add an iteration to the list:

6. Click the **Add** button.

   A row appears in the table, in which you add list elements to create an iteration. One row must be added for each desired iteration.

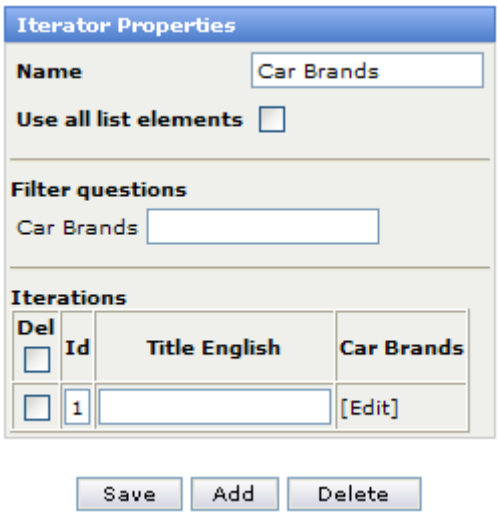


Figure 607 Iterator "Departments"

7. Click **Edit**.

   The Iteration Details dialog opens as shown below.

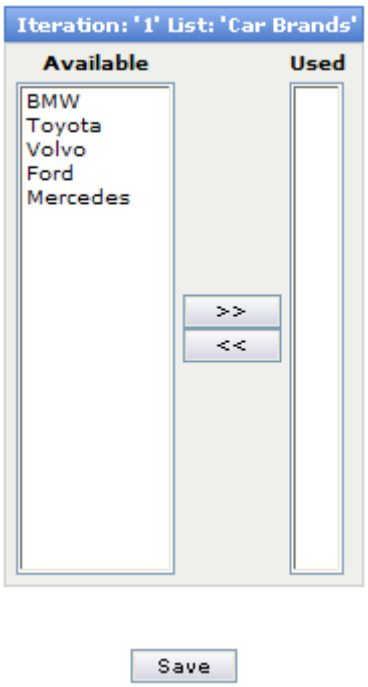


Figure 608 The Iteration Details dialog with the available iterations in the left column

The Available column lists the iterations, or choices, on which the iterated reports can be based.

8. In the Available column, click on the iteration you wish to use and click **>>** to move it to the Used column.

   Note that you can add as many items from the Available list to the used list as you wish.

9. Click **Save** to save the changes and close the window.
10. Type a title for this report iteration into the Title field.
11. If the report is to be in more than one language, double-click in the Title field to open a translation dialog and type in the required texts.
12. Click **Save** to save the changes.

    For this example, the procedure is repeated from point 6 for each of the European car makes, and a final row is added to the table for all the non-European makes. For the non-European row, two car makes have been added in the Iteration Details dialog (points 7/8 in the procedure). Note that the iterator list is sorted alphabetically by the titles.

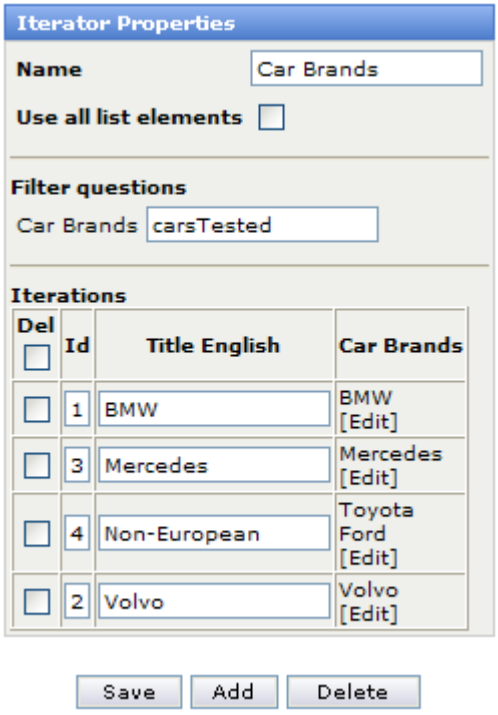


Figure 609 The Iterator Properties dialog with the iterations added

20.12.4. Assigning an Iterator to a Report

Once the iterator is created, you can assign it to one or more reports. To do this:

1. Go to the **Reporting > Online Reporting** menu command.

   The Online Reporting page opens.

2. In the report tree column, double-click on the report you wish to assign the iterator to.

   The Report Properties dialog opens as shown in the example below.

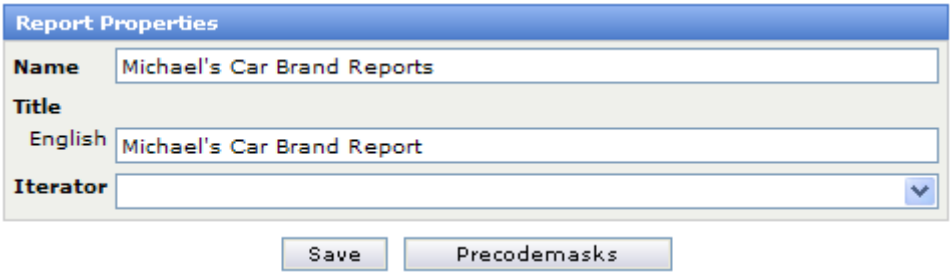


Figure 610 Example of the Report Properties page

3. Click the down-arrow beside the Iterator field to open a list of the iterators available, and select the desired iterator from the list.
4. Click **Save** to save the changes.

   The dialog expands to include two additional items as shown below.

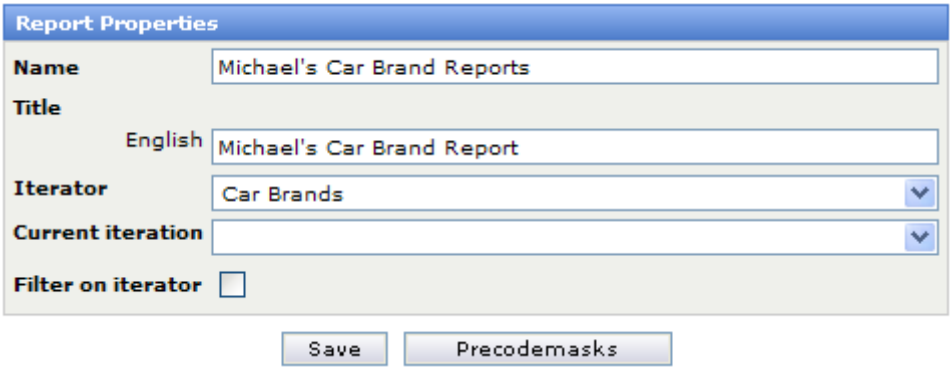


Figure 611 Example of the Report Properties dialog with the Current Iteration field and Filter... box

The Current Iteration field enables you to select and view one particular iteration of the report. The field contains a list of the iterations created in the selected iterator (go to How to Create an Iterator and Define Iterations on page 439 for more information). Click the down-arrow beside the field to open a drop-down list and select the desired iteration from the list.

All the iterations created in this iterator are available in the “Current iteration” drop-down list. To be able to preview the report later, when the iteration filter or mask has been applied to report nodes, an iteration must be selected in this field. Then the preview of the report will display all iterations of the report.

20.12.5. Assign Iterator Filter/Mask to Report Nodes

When an iteration is assigned to the report, you can:

- Use the iterator as a filter on report nodes.
- Use the iterator as a mask for corresponding questions in the report. Note that the iterators use scales and lists. If a list in the iterator is used as mask on a question that does not use the same predefined list in its answer list, the corresponding precodes will be masked. This is normally not desirable.

On the report’s properties page or in each report node’s properties page, specify whether or not you wish to use the iterator as a filter. To do this:

1. Highlight the report node or the report and go to the **Edit > Properties** menu command, or right-click the object and select Properties from the drop-down menu.
2. Open the **Filter** tab.

The “Filter on report iterator” checkbox must be checked to make the iterator work as a filter on this report node (see the figure below).

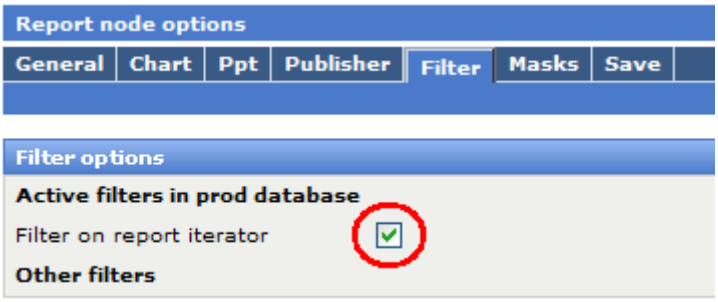


Figure 612 Filter on Report Iterator

The fields in the Filter tab of a report node’s properties page are as follows:

- **Filter on report iterator** - enables the use of the iterator as a filter.
- **Filters in test database** - if any filters have been made, they are available here.

If you wish to use the iterator as a mask on a report node, you must specify this in the “Masks” tab on the report node’s properties page. An iterator must be selected in the “Iterated report mask” drop-down box as shown in the figure below.

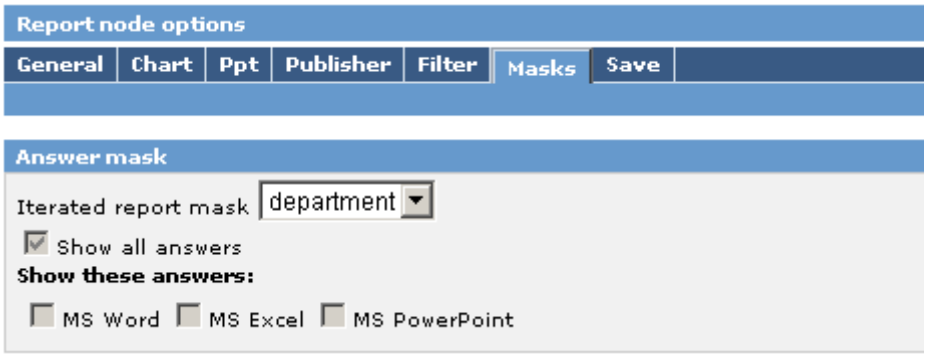


Figure 613 Iterated Report Mask

The fields in the Masks tab of a report node's properties page are as follows:

- **Iterated report mask** - Select list/scale to use for masking the iterated report.
- **Show average** - Choose this to show the average value of the variables. The answers/scales must be assigned values (go to Answers on page 153 for more information).
- **Show best** - The best average value is shown.
- **Show worst** - The worst average value is shown.
- **Show all answers** - All answers/scales are shown in the table/chart.
- **Show these answers** - check the boxes for the specific answers/scales you want to be shown in the table/chart.

20.12.6. Assign Iterator Filter/Mask to Pivot Views

You can connect an iterator to a pivot view. To do this:

1. Go to the pivot view's properties page.
2. In the Iterator drop-down box, select the iterator to be used.

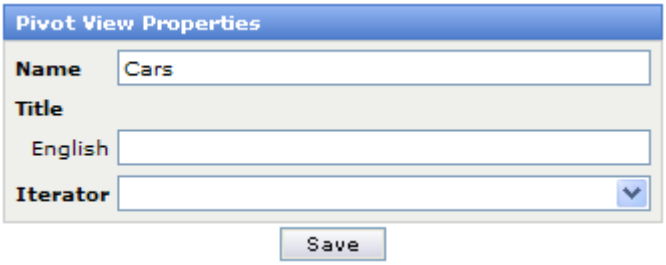


Figure 614 Example of the pivot view Properties page

The fields in the pivot view Properties window are as follows:

- **Name** - the name of the selected pivot view.
- **Title** - the title of the pivot view. If the project is multilingual, there will be one title field per language. This name will be displayed in the End User Interface.
- **Iterator** - click the down-arrow to open a list of the iterators available, and select the required iterator from the list.

To assign iterations to separate nodes in the pivot view:

1. Open the pivot view node's properties page.
2. In the "Iterated report mask" drop-down box, select the iterator to be used.

When the pivot view is published, users are connected to iterations (one iteration per user). Each user will be able to see the data available to him/her depending on the iteration connected (go to Administration of End Users on page 499 for more information).



Figure 615 The pivot view form properties box

20.12.7. Ordering MS Office Reports

When ordering MS office reports for an iterated report, the user can select which iterations he wants to order a report for. To do this:

1. Go to the **Reporting > Online Reports** menu command.

   The online Reporting page opens.

2. In the report tree, click on the report you wish to order an MS Office report for, to highlight it.

3. Go to the **Actions > Order Report** command in the report tree menu bar, or right-click on the report and select **Order** from the drop-down menu.

   The Export Properties page opens as shown below. This is a multi-select window, allowing you to order reports for several iterations simultaneously. One report will be created for each selected iteration. If no iteration is highlighted, all iterations will be generated.

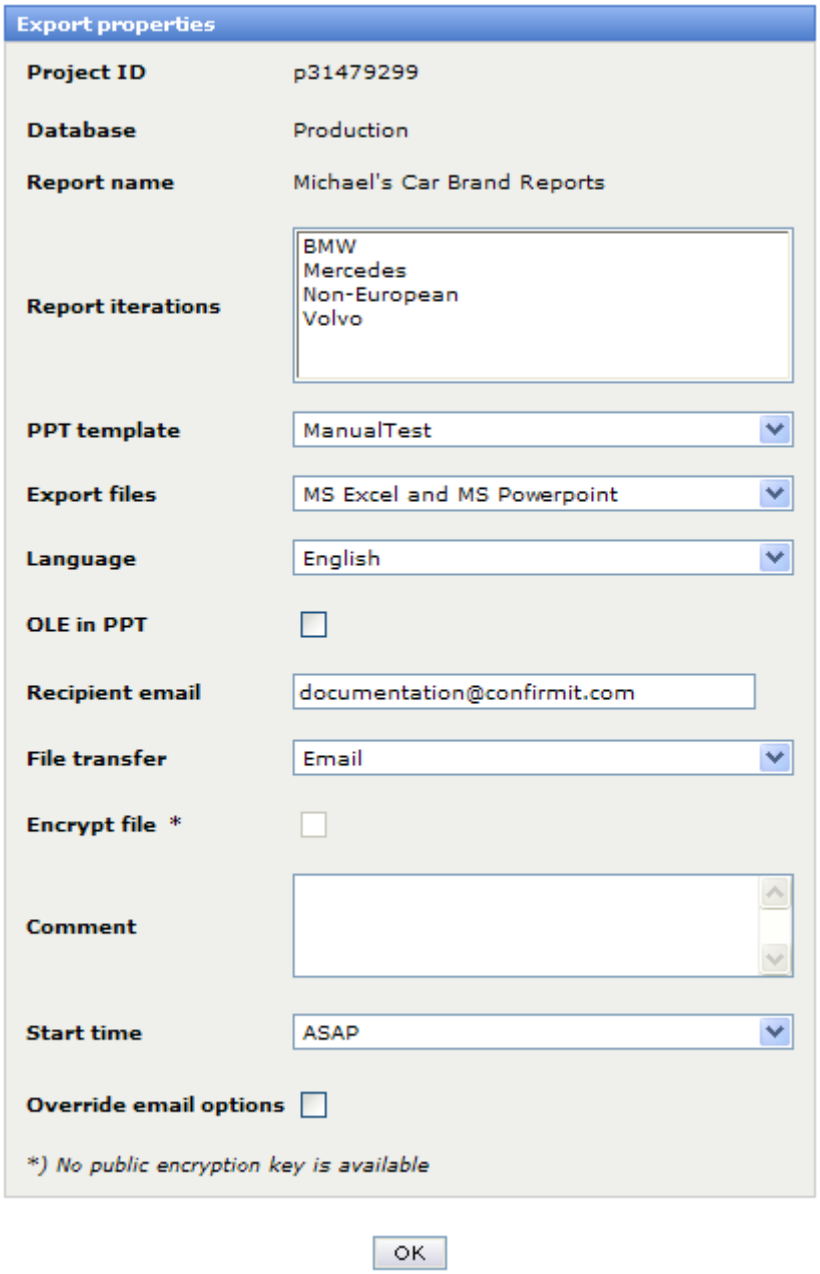


Figure 616 The Export Properties page for iterators

The fields in the Export Properties window are as follows:

- **Project ID** - the ID of the project that is providing the data on which the report is based.
- **Database** - the currently selected database, from which the data will be used to create the report.
- **Report name** - the name of the selected report.
- **Report iterations** - using standard Windows techniques, highlight the iterations to be published. If no iterations are highlighted all will be published.
- **PPT template** - select the PPT template to be used.
- **Export files** - select the desired type of report export, PPT or Excel or both.
- **Language** - select the language to be used in the export. All languages used in the project are available.
- **OLE in PPT** - select if OLE is to be used. This allows you to edit the objects using applications other than those in which the objects were originally created.

- **Recipient email** - the email address to which the reports will be sent.
- **File transfer** -
- **Encrypt file** - check this box if you wish the file to be encrypted.
- **Comment** - type in any comments as required.
- **Start time** - select whether the report is to be exported as soon as possible or scheduled for a later start time.
- **Override email options** -

4. When you have made the appropriate settings, click **OK**.

   Depending on the selected start time, the reports are created, zipped, attached to an email and sent to the recipient address.

The Confirmit Office report task numbers will also include the precodes of the iterators, to simplify later identification.

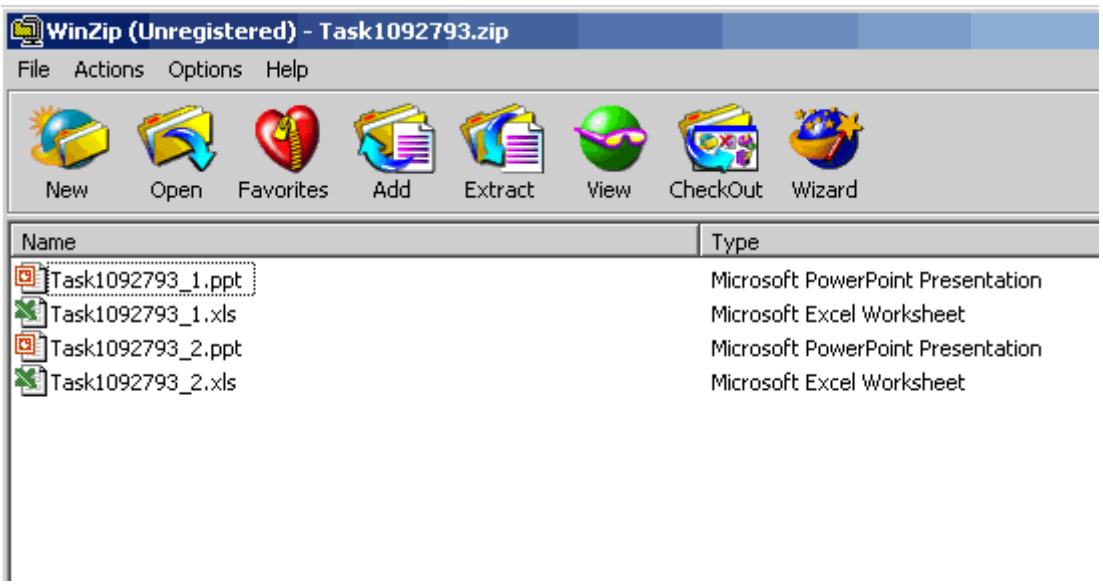


Figure 617 Example of Iterator Precodes used in the file names

20.12.8. Publishing an Iterated Report

To publish an iterated report:

1. Go to the **Reporting > Online Reports** menu command.

   The online Reporting page opens.

2. In the report tree, click on the report you wish to publish to highlight it.
3. Go to the **Actions > Publish Prod** or **Publish Test** menu command (depending on whether you wish to publish the production or test data) or right-click on the report and select **Publish Prod/Test** as appropriate from the drop-down menu.

   The Published Online Report window opens as shown below.

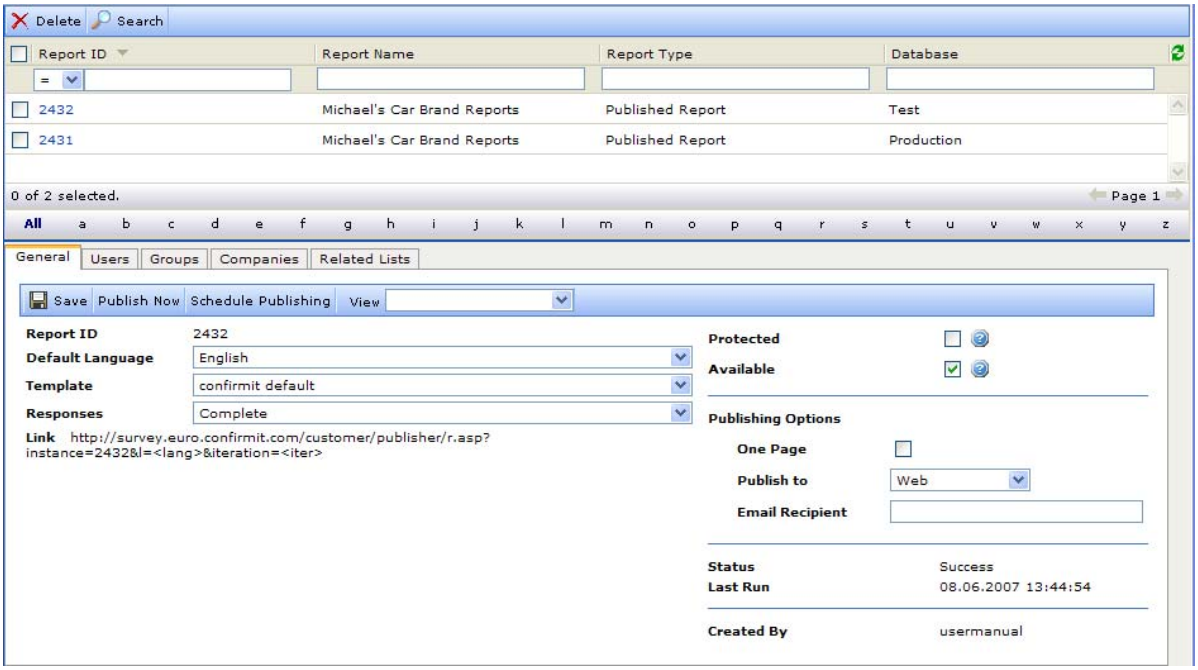


Figure 618 Example of the Published Online Reports window

Use the fields and properties on the General tab to select the settings for the reports and define when and how the publishing operation is to be performed.

- **Report ID** - the system-defined ID for the report.
- **Default Language** - the default language for the report.
- **Template** - select the template on which the layout of the report is to be based.
- **Responses** - select whether you want to use only complete responses, only incomplete responses, or both.
- **Link** - the URL to the report. When iterated reports are published, one report is created for each iteration. These reports will have links in the format:

  http://<server>/publisher/<projectid>/<reportid>/<iterationid>/r.asp
- **Protected** - if you select this option, the published report will not be publicly available. You must then assign the report to the end users using the remaining tabs in this window (go to Administration of End Users on page 499 for more information). The assigned users will be able to see the report when they log in to the portal for published reports. Non-protected reports are available via a public URL.
- **Available** - if you select this option, the published report will be listed when the end user logs in to the portal and he/she will be able to view the report. If not selected, the report will not be listed in the portal.
- **One Page** - check this box if you want all the report data to be published as one page. If this box is not checked, then the report data will be paginated as defined by the project.
- **Publish to** - select where you wish to publish to; the Web, Email, or both.
- **Email recipient** - if you select Email in the Publish to field, type in the email address here.
- **Status** - the current status of the publishing operation.
- **Last Run** - the date and time of the previous
- **Created By** - the username of the person publishing the report.

By using the Confirmit end user environment, you can allocate access to specific iterations of this report(go to Administration of End Users on page 499 for more information)

4. Make the appropriate settings and click **Save** to save them
5. Click **Publish Now** to publish the report.

The publishing task is sent to the task queue to be run, or will be run as specified in the Schedule Publishing dialog. On completion, the link will be created if this is the first time the report is published. Click on the Report ID link in the upper part of the window to update the displayed information.

When a report is published, you can preview it as follows:

1. In the report tree, right-click on the report and select **Show**. The report is opened to the right of the tree.
2. Go to the **Reporting > Published Reports** menu command and click on the Report ID link. In the General tab in the lower part of the window, copy the link and paste it into a new browser window. Ensure the language code is set correctly (for example, 9 = English), then press **Return**.

When the report is an iterated report, this link leads to a page with the links to all iterations of the highlighted iterated report (go to Administration of End Users on page 499 for more information).

20.12.9. Publishing Pivot Views

A pivot view is published the same way as a report (go to Publishing an Iterated Report on page 448 for more information).

1. Go to the **Reporting > Online Reports** menu command.

   The online Reporting page opens.
2. In the report tree, click on the pivot view you wish to publish to highlight it.
3. Go to the **Actions > Publish Prod** or **Publish Test** menu command (depending on whether you wish to publish the production or test data) or right-click on the pivot view and select **Publish Prod/Test** as appropriate from the drop-down menu.

   The Published Online Reports window opens. This window is also accessible via the End Users - Reports main menu command.
4. Use the fields and properties on the General tab to select the settings for the view.

The fields and buttons are as follows:

- **Save** - click to save any changes you may make to the settings.
- **Update Pivot View** - a pivot view always displays real time data. If a pivot view has been edited, update the published pivot view by clicking this button.
- **View** - this field lists the languages available. Select the language you wish to use for the pivot view from the list.
- **Report ID** - the system-defined ID for the report.
- **Default Language** - the default language for the report.
- **Template** - select the template on which the layout of the report is to be based.
- **Protected** - if you select this option, the published pivot view will not be publicly available. You must then assign the view to the end users using the remaining tabs in this window (go to Administration of End Users on page 499 for more information). The assigned users will be able to see the view when they log in to the portal for published reports. Non-protected reports are available via a public URL.
- **Available** - if you select this option, the published pivot view will be listed when the end user logs in to the portal and he/she will be able to view it. If this option is not selected, the pivot view will not be listed in the portal.
- **Created By** - the username of the person publishing the report.

Click on the report in the list in the upper frame and click “Details (go to Publishing Reports on page 451 for more information).

The pivot view must be connected to users before they (the users) have access to it.

20.12.10. Connecting Users to Reports/Pivot Views

Before users can view a published iterated report or pivot view, it must be linked to the specific users. The End User functionality is built around end user lists. A user must be connected to an end user list and a company, so these must be created or must already exist before a user can be created. Only a Confirmit administrator can create an end user list.

For further information on creating end user lists, and connecting end users to reports and pivot views, refer to the Administration of End Users chapter.

20.13. Publishing Reports

To publish a report:

1. Go to the **Reporting > Online Reporting** menu command.
2. Go to the **Actions > Publish Prod** or **Publish Test** menu command (depending on whether you wish to publish the production or test data) or right-click on the report and select **Publish Prod/Test** as appropriate from the drop-down menu.

   The Published Online Reports window opens as shown in the example below.

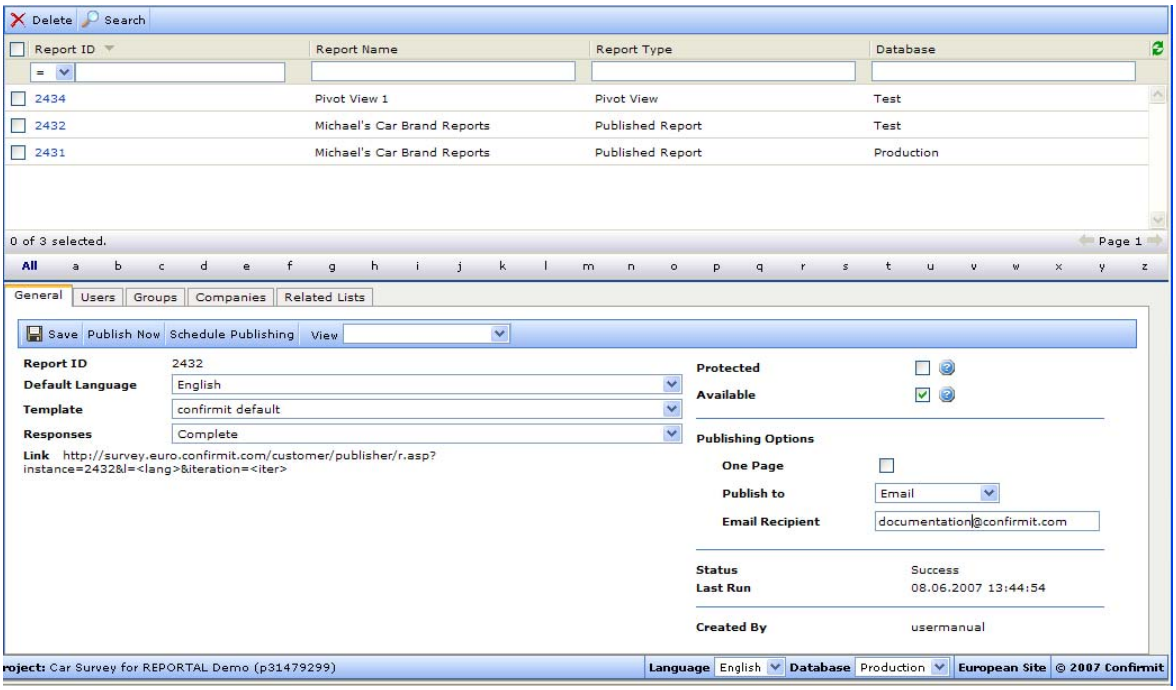


Figure 619 Publishing a report

Use the fields and properties on the General tab to select the settings for the report, and define when and how the publishing operation is to be performed.

- **Report ID** - the system-defined ID for the report.
- **Default Language** - the default language for the report.
- **Template** - select the template on which the layout of the report is to be based.
- **Responses** - select whether you want to use only complete responses, only incomplete responses, or both.
- **Link** - the URL to the report.
- **Protected** - if you select this option, the published report will not be publicly available. You must then assign the report to the end users using the remaining tabs in this window (go to Administration of End Users on page 499 for more information). The assigned users will be able to see the report when they log in to the portal for published reports. Non-protected reports are available via a public URL.
- **Available** - if you select this option, the published report will be listed when the end user logs in to the portal and he/she will be able to view the report. If not selected, the report will not be listed in the portal.
- **One Page** - check this box if you want all the report data to be published as one page. If this box is not checked, then the report data will be paginated as defined by the project.
- **Publish to** - select where you wish to publish to; the Web, Email, or both.

- **Email recipient** - if you select Email in the Publish to field, type in the email address here.
- **Status** - the current status of the publishing operation.
- **Last Run** - the date and time of the previous
- **Created By** - the username of the person publishing the report.

3. Make the settings as required, then click **Save** to save the changes.
4. Click **Publish Now** to publish the report immediately, or click **Schedule Publishing** to publish at a later time/date (go to How to Schedule Publishing on page 452 for more information).

   The report is published as specified.

By setting up the Confirmit end user environment, you can allocate access to specific users(go to Administration of End Users on page 499 for more information)

When a report is published, you can preview it as follows:

1. In the report tree, right-click on the report and select **Show**. The report is opened to the right of the tree.
2. Go to the **Reporting > Published Reports** menu command and click on the Report ID link. In the General tab in the lower part of the window, copy the link and paste it into a new browser window. Ensure the language code is set correctly (for example, 9 = English), then press **Return**.

20.13.1. How to Schedule Publishing

You can instruct Confirmit to update the published report every x Hours, days, weeks or months. To set up the schedule, proceed as follows:

1. In the Online Reporting window, right-click on the report you wish to publish and select **Publish Prod/Test** as appropriate, or select the report and go to the **Actions > Publish Prod/Test** menu command.

   The Published Online Report window opens with the details of the report.
2. In the lower part of the window, click **Schedule Publishing**.

   The Recurrence Pattern window opens as shown below.

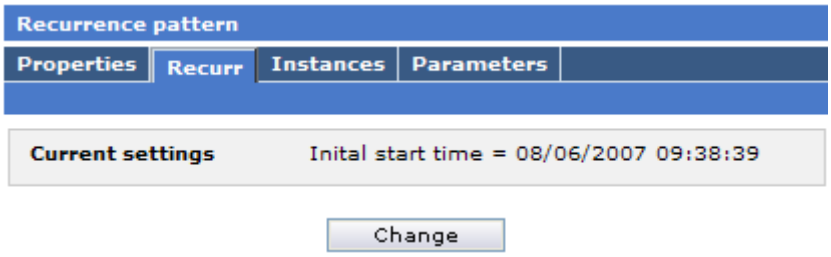


Figure 620 The Recurrence Pattern window

3. Click the **Change** button to open the settings and set Recurring task to **Yes**.

   The window expands to that shown below.

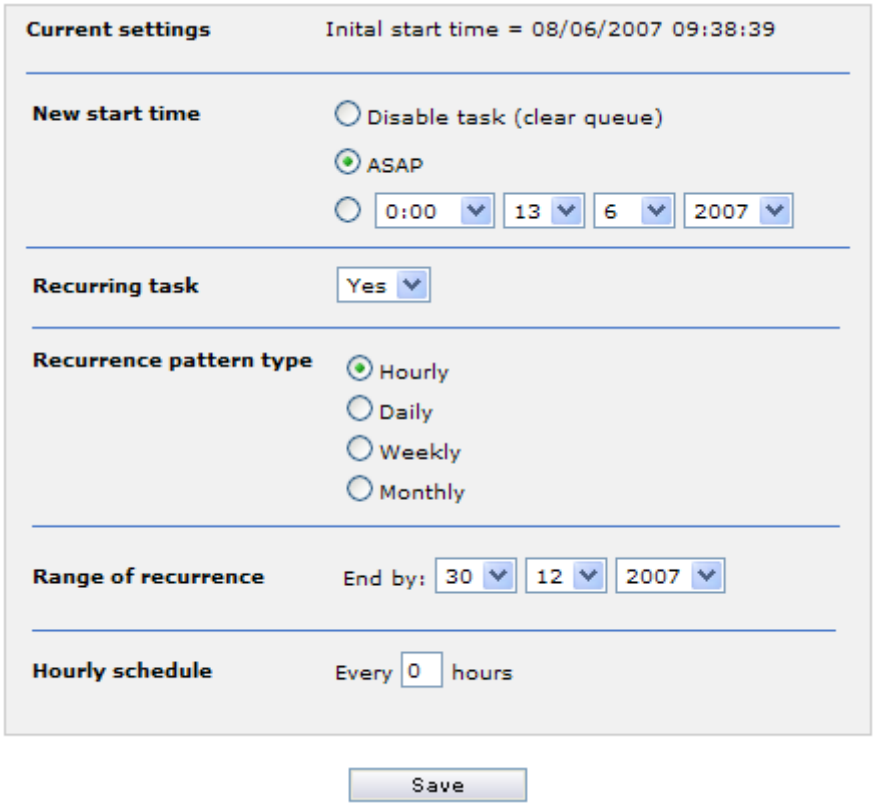


Figure 621 Setting the recurrence schedule for published reports

4. In the New Start Time fields, set the time you want the first publishing task to be performed.
5. In the Recurrence Pattern Type area, click the radio button corresponding to the frequency required for the recurrence.

   The “Schedule” area towards the bottom of the dialog changes depending on the selection made here. In this area:

   - 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 be first executed at the date and time set in the New Start Time fields, then will be repeated every four hours.
   - 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 be first executed at the date and time selected in the New Start Time fields, and will be repeated every third day.
   - 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 every second week; the first time on the Monday, the next time on the Friday, the next time on the Monday and so on.
   - 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. In the Range of Recurrence fields, set the end-date and time for the recurrences. No recurrences will be performed after this date and time.
7. Click **Save** to save the settings.

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

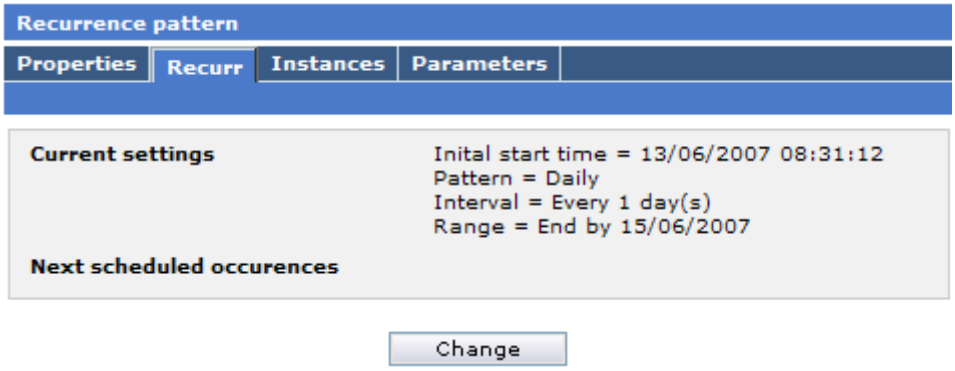


Figure 622 Example of the Recurrence Pattern with a recurrence sequence scheduled

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.

20.13.2. Changing a Report after Publishing

The report in the **Reports** folder is the source of the published report. So if you for example wish to change the chart type or edit the Publisher Options, the changes will be applied the next time the Publisher engine runs (based on *Recurrence pattern* or *Run now* activation).

Note that you cannot change the overall settings after publishing. So if you publish a report with Count Format and later wish to change to Percent, you will have to publish the report again after you change the settings. The same applies for changes in language or if you want to remove or insert a chart after publishing.

To delete an out-of-date report publication, click in the checkbox beside the publication and click **Delete**.

20.14. 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).

20.14.1. How to Generate BitStream Files

1. Go to the **Reporting > Create Reportal BitStream Files** menu command.

   The page shown below opens.

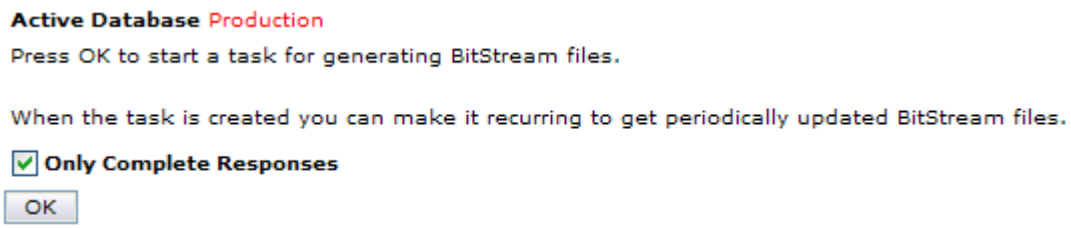


Figure 623 BitStream File generation settings

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.

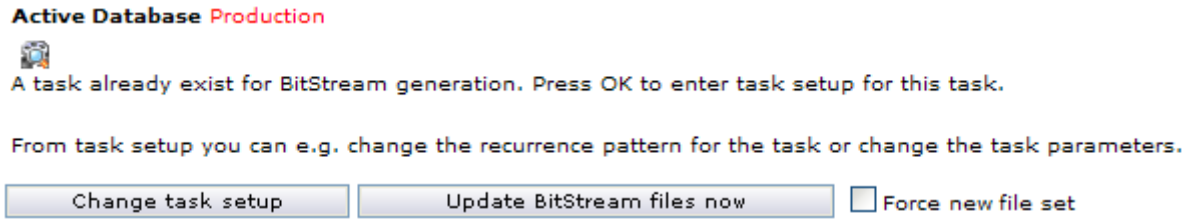


Figure 624 The BitStream Files generation settings page once the task exists

   This page allows you to change the task, for example to make it a recurring task, and to run the task immediately. The buttons are as follows:

   - **Change task setup** - click to open the Task Setup page (see below).
   - **Update BitStream files now** - click to start the BitStream File update task immediately (the task will be placed in the queue and will be run when its turn comes).
   - **Force new file set** - normally when the BitStream file task runs, the existing files will be updated. Check this box to delete the existing files completely and replace them with new files. Note that this only affects the data that is included in the report, not the report itself, so no other actions are necessary.

4. Click **Change task setup** to open the Task Setup page for the task as shown below.

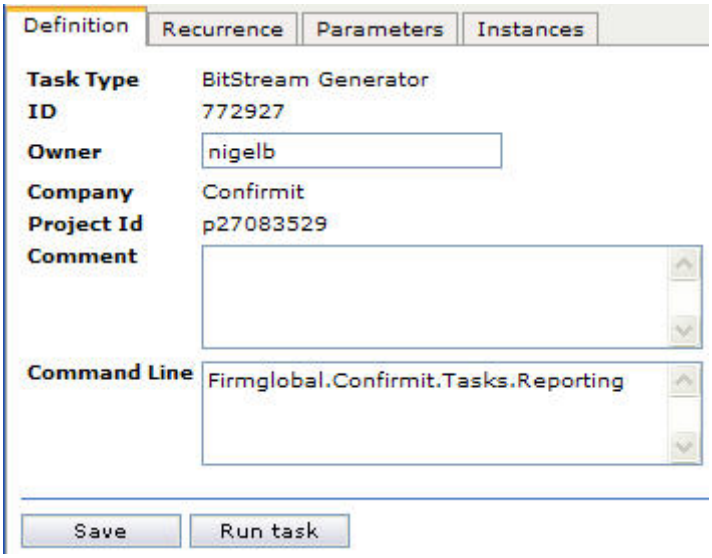


Figure 625 BitStream Generator task parameters

   Go to the Recurrence tab and click **Change** to access the recurrence properties (go to Updating the BitStream Files on page 456 for more information).

20.14.2. Updating the BitStream Files

If you are running a live survey and wish to have the BitStream files updated at regular intervals to add new responses, you can set up a recurrence pattern on the BitStream generation task. You can for example have the files updated twice a week on Mondays and Thursdays at 2 o'clock in the morning.

As the BitStream file creation process will interrogate the SQL database to retrieve the data on the survey, you are recommended to set the task to run during periods when low activity in the survey can be expected, for example late at night.

1. To set the task to repeat at regular intervals, go to the Recurrence tab and click **Change**.

   The layout of the tab changes.

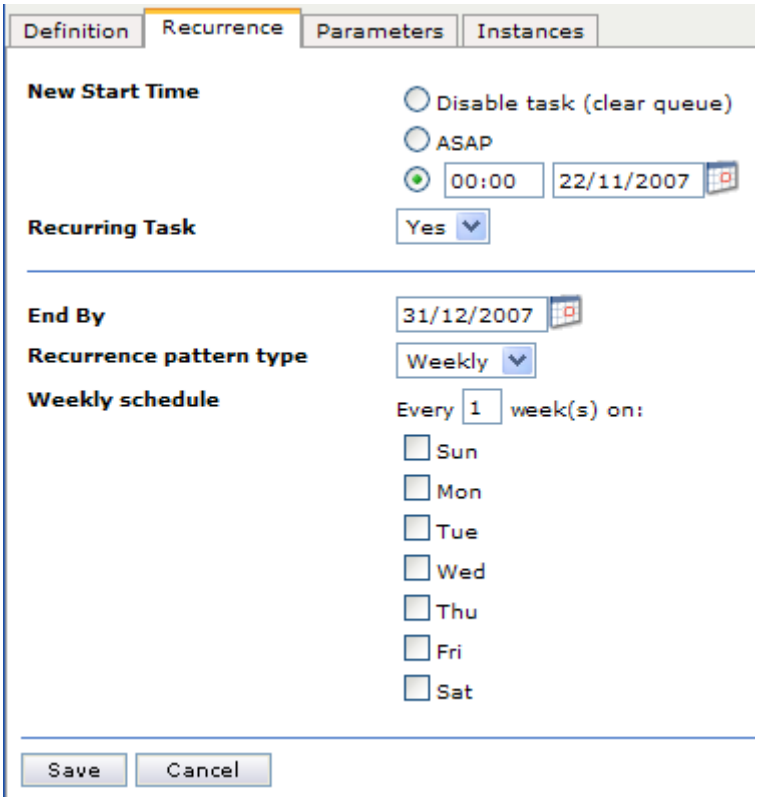


Figure 626 The Recurrence Pattern dialog

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 schedules occurrences are listed.



Figure 627 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.
- Precodes 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.

If you use recoded variables in your survey (go to Recoding Variables for Reporting Purposes on page 408 for more information) ensure that the recoded variables are calculated for new responses before the BitStream generation is run.

20.14.3. 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.

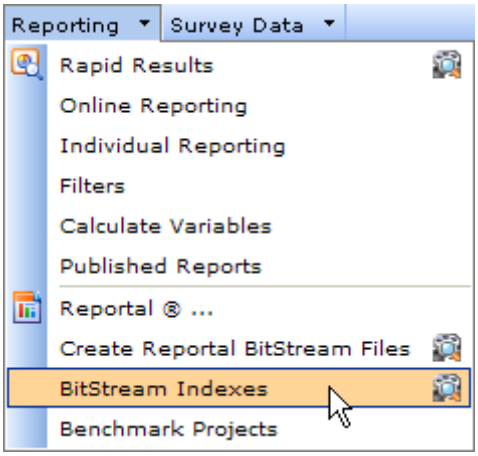


Figure 628 Starting BitStream Indexing

The BitStream Indexes page opens as shown in the example below.

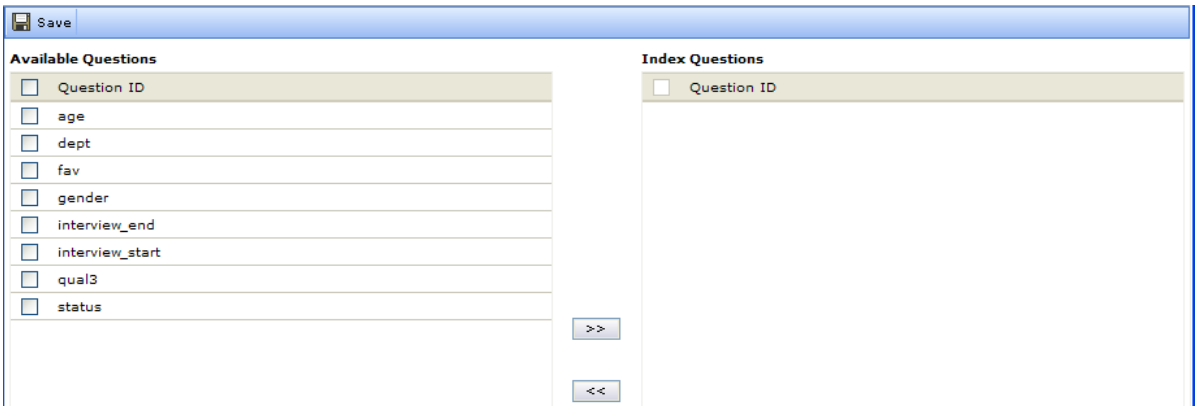


Figure 629 The BitStream Indexes page

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).

   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.

20.15. Pivot Views

The Pivot View functionality is an interactive interface for report end-users, where the users have access to a set of questions from the survey. Questions can be dragged and dropped into rows and columns to create different views online. The data is real time and views may be created while the survey is live.

The following item types can be in a pivot view:

- Time series.
- Single.
- Multi (not ordered or open text).
- Single elements from a grid.
- Open, numeric.
- Open float (recoded).

- Loop (not including items within the loop).

A grid question cannot be dragged directly into the pivot groups. Grid questions consist of one or more single questions, and you will have to single click the grid question (click the icon) or click expand to drag these single questions into the pivot group.

The pivot view is connected to a template when it is published. The pivot view template is created and edited in separate fields in the WI template editor.

Iterators can be connected to pivot views. This makes it possible to publish a pivot view and give users access to different iterations of the pivot view. An iteration is a masked pivot view (it can also be used as a filter, by dragging a question with an iteration into the filter container in the pivot view application). The end user can only see the data and information which he/she has been given access to through the iteration (go to Iterated Reporting on page 438 for more information).

20.15.1. How to Create a Pivot View in the Report Tree

This section describes, using an example project, how to create a pivot view.

The pivot view is created in the report tree using the same method as for a report. Here there is a folder called *Pivot Views* within which new pivot views are created (see the figure below). Only questions that are inserted in the pivot view folder will be available to the user in the pivot view screen to create different views. In the following text, the expression “create pivot view” is used both in connection with creating the pivot view in the report tree and when creating different views in the dynamic pivot view screen used by the end users.

1. Go to the **Reporting > Online Reporting** menu command.

   The Online Reporting page opens. In the reporting tree, the **New reporting object** folder contains two pivot view objects; **Pivot View** and **Pivot View Group** as shown in the figure below.

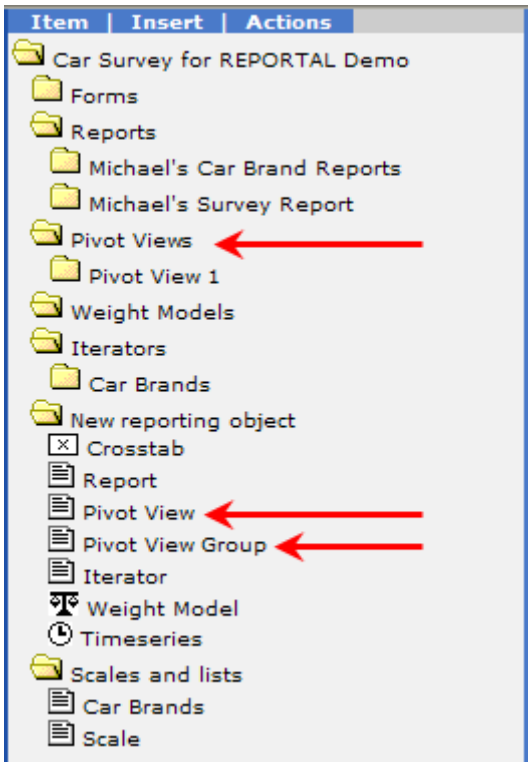


Figure 630 The Pivot View objects in the report tree

2. Drag a **Pivot View** object from **New reporting object** folder and drop it into the **Pivot Views** folder.
3. Right-click on the new Pivot View object and select **Properties** from the drop-down menu, or select the object and go to the **Item > Properties** menu command.

   The pivot view's Properties page opens as shown in the example below.

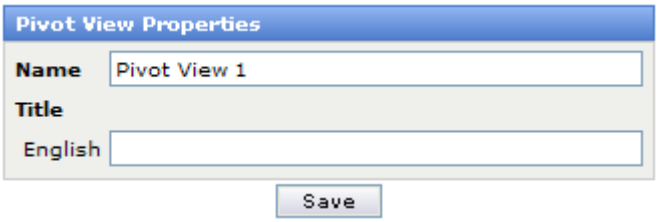


Figure 631 The Pivot View Properties page

4. Give the new pivot view a logical name in the Name field (in the example, the pivot view is called “Cars”).
5. In the Title field, type in a title for the view. Note that if the project is multi-lingual, there will be one Title field for each language in the project.
6. Click **Save** to save the changes.

A *Pivot View Group* is a folder that holds reporting objects. Its only function is to hold and systemize the reporting objects. It is not possible to add reporting objects directly into the pivot view folder, so at least one pivot view group is needed. The maximum number of items allowed in one Pivot View Group is 29. In the example, two *Pivot View Groups* are added to the pivot view so the reporting objects can be grouped under Demographics and Car Questions.

7. Drag a **Pivot View Group** object from the **New reporting object** folder and drop it into the new Cars Pivot View object.
8. Open the group's Properties page and give it a logical name (in this case Demographics).
9. Repeat the procedure for the Car Questions group.

   The result will be as shown in the example below.



Figure 632 The Pivot View being created - 1

You must now drag into the Demographics and Car Questions objects the questions that you wish to make available to the users.

10. For this example, from the **Forms** folder, drag and drop the single questions **Gender** and **Age** into the **Demographics** group .
11. Drag and drop the multi question **Cars** and the single questions from the Qualities 1 (grid) question, into the **Car Questions** group.

    The result will be as shown in the figure below.

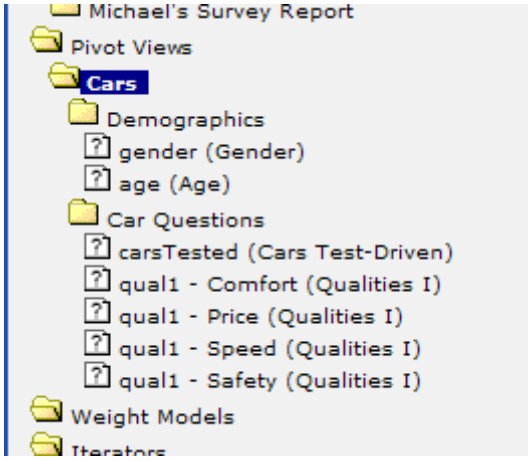


Figure 633 The Pivot View being created - 2

20.15.2. How to Connect an Iterator to a Pivot View

If an iterator is available in the report tree, then you can connect the iterator to a pivot view. This section describes how to do this. The remainder of this section and the example do not discuss iterated pivot views - iterated pivot views are described in the “Iterated reporting” section (go to Iterated Reporting on page 438 for more information). To publish an iterated report does not involve any more steps than those described in this section, and to connect iterations of the pivot view to users.

To connect an iterator to the pivot view:

1. Open the Properties page for the pivot view.

   If an iterator is available, then the properties page will include the Iterator field.

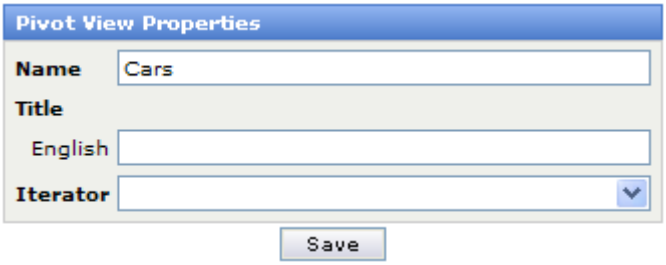


Figure 634 The pivot view Properties page with the Iterator field

2. Click on the down-arrow beside the Iterator field to open a drop-down list of the iterators available, and select the required iterator from the list.
3. Click **Save** to save the changes.

   To assign iterations to individual nodes in the pivot view, enter the node’s properties page and select the iterator to be used from the Iterated Report Mask drop-down box as shown in the figure below. When the pivot view is published, users are connected to iterations. Each user will be able to see the data available to him according to the iteration connected to him.



Figure 635 Connecting an iterator to a Pivot View node

20.15.3. How to Publish a Pivot View

To publish a pivot view:

1. Go to the **Reporting > Online Reports** menu command.

   The online Reporting page opens.

2. In the report tree, click on the pivot view to highlight it.

3. Go to the **Actions > Publish Prod** or **Publish Test** menu command (depending on whether you wish to publish the production or test data) or right-click on the pivot view and select **Publish Prod/Test** as appropriate from the drop-down menu.

   The Published Online Report window opens (note that if the report is multi-lingual, then a language selection field is included in the lower area).

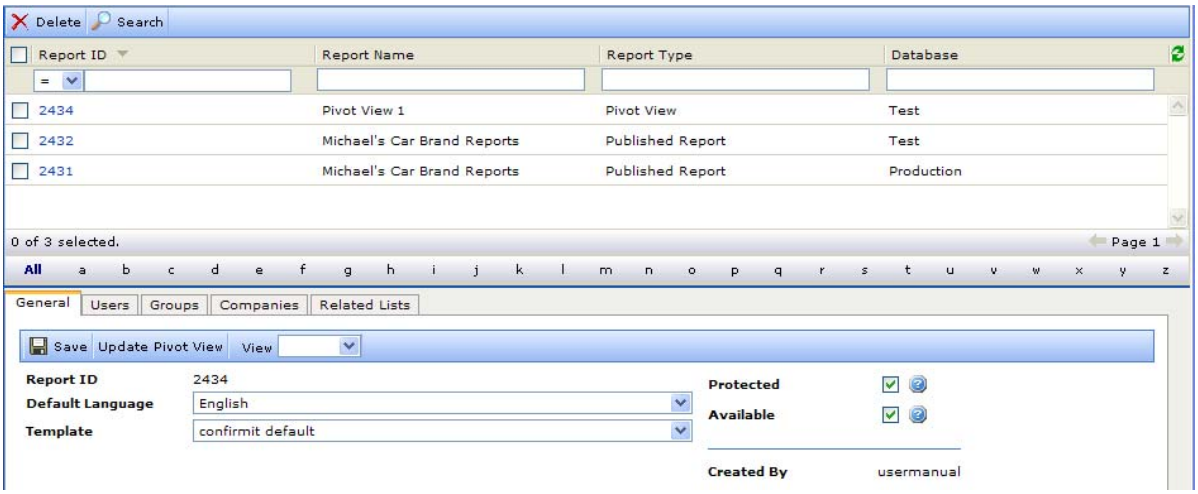


Figure 636 Example of the Published Online Report window for pivot views

   The page comprises two areas. The upper area holds the list of published reports and pivot views. Click on a Report ID link to open the details page for that report in the lower area. For more information about this end user functionality, refer to the AdministrationofEndUsers section.

4. Make the settings on the various tabs as required, then click **Save** the save the changes.

5. Click **Update Pivot View**.

   The pivot view is created/updated and is added to the list in the upper part of the window.

To preview the published pivot view, click the down-arrow beside the View field to open a list of the published views/iterations, and select the desired view from the list. A new window opens to display the view (go to The Pivot View Interface on page 462 for more information).

20.15.4. The Pivot View Interface

Enter this interface either from the Confirmit interface (as a Confirmit user) or from the Enduser interface.

To open this interface:

1. Go to the Published Online Report page (go to How to Publish a Pivot View on page 462 for more information).

2. In the toolbar for the lower frame of the page, click the down-arrow beside the View field to open a list of the published views/iterations and select the desired view from the list.

   A new window opens to display the view, as shown in the example below.

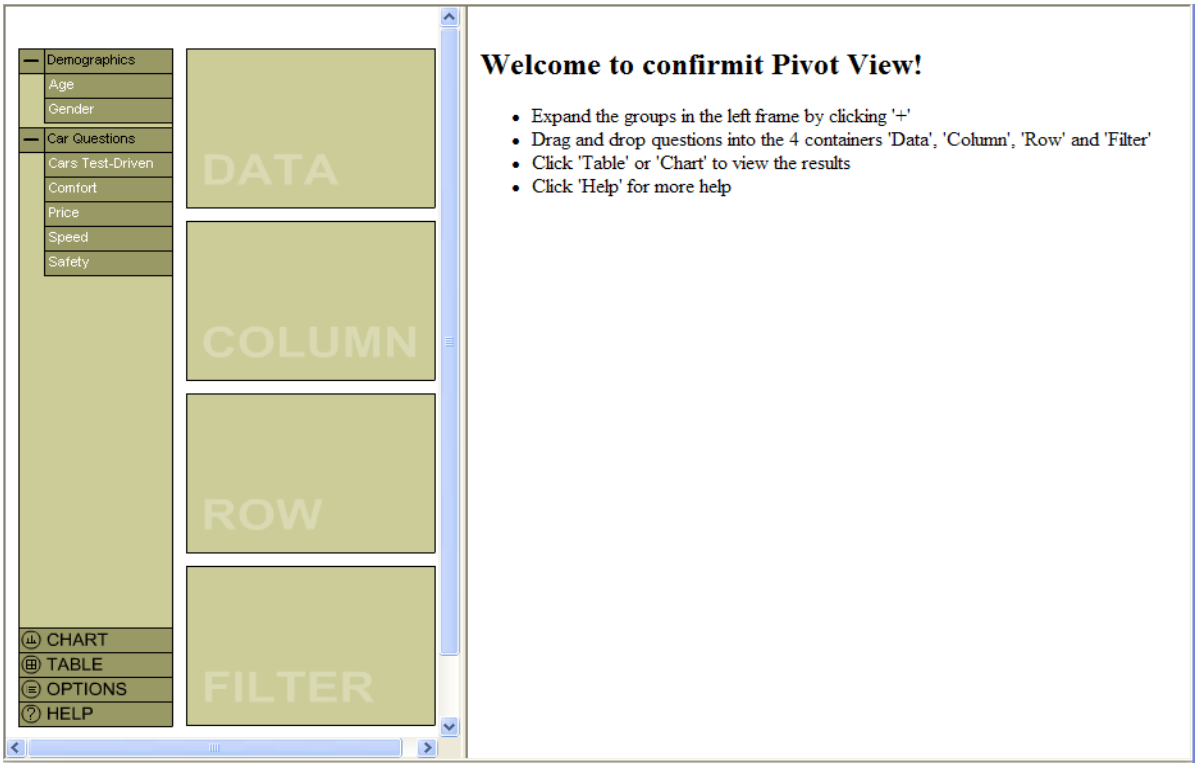


Figure 637 Example of a Pivot View window

The pivot view interface is divided into two frames. The left frame is the user interface in which the user selects the questions he/she wishes to view, chooses the desired display options and sets the display mode. The right frame is where the results are presented. To build a view:

1. In the left column, expand the questions by clicking on the + icons (in the figure above the questions have already been expanded).
2. Drag the desired questions from the left column and drop them into the Data, Column, Row and Filter areas as appropriate.
3. In the Data, Column, Row and Filter areas, click the down-arrows beside the selected items to open drop-down lists of the variables, and select/deselect variables as required.
4. Click **Options** to open a list of the display possibilities, select as required and click **Save** to save the changes.
5. Click the desired display mode (Table or Chart).

   The requested result is displayed in the area to the right.

20.15.5. Hot keys

You can use hot-keys instead of clicking the Chart, Table, Options and Help buttons. The hot-keys are:

- **c** – for chart
- **t** – for Table
- **o** – for options
- **h** – for help

Note: To use the hot-keys, the left frame must be active. If the hot-keys do not appear to be functioning, click in the left frame to make it active.

20.15.6. The Application Interface (Left Frame)

The menu on the left can contain one or more Pivot Groups, which in turn may contain one or more Items. The figure below shows the frame after items have been dragged from the pivot groups into the various containers.

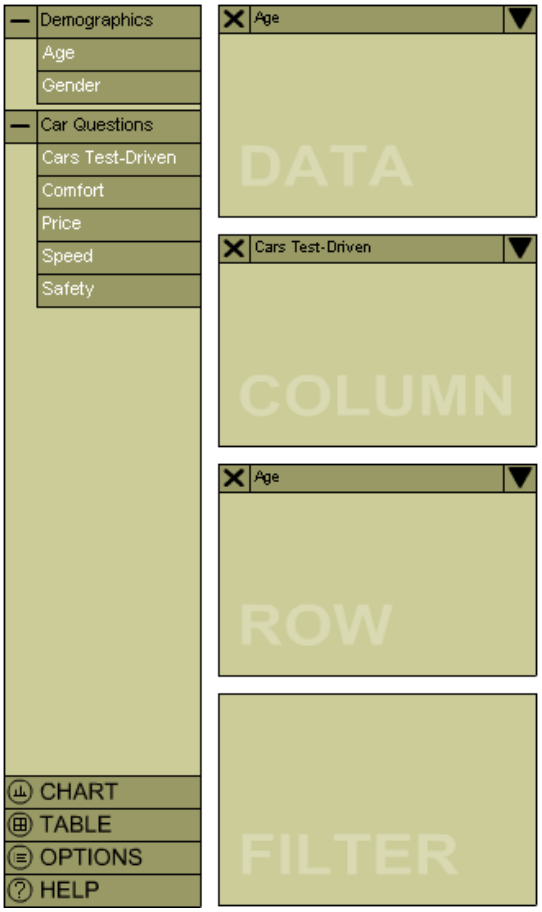


Figure 638 Overview of the Pivot View left frame

The frame includes the following items:

- **Groups –** one or more pivot groups that contain items.
- **Chart button –** click to display a chart in the right frame, based on the items dropped into the containers.
- **Table button –** click to display a table in the right frame, based on the items dropped into the containers.
- **Options button –** click to display an options menu in the right frame. Here you can choose between different types of settings (go to Options on page 465 for more information).
- **Help button –** click to display a page of help information in the right frame.
- **Containers –** four containers that can contain items from the groups.

Some symbols trigger actions when clicked. The symbols are explained below:

- - opens a group and reveals the underlying items.
- - closes a group and hides the underlying items.
- - deletes an item from one of the containers.
- - opens the alternatives for an item in a container
- - inverts the chosen alternatives for an item in a container.
- - brings you one alternative forward. (If there are more than 9 alternatives/ iterations to mask or filter in an item (in columns, rows or filter containers), arrows will appear.)
- - brings you to the end of the alternative list for the item.
- - brings you one alternative backwards.

-  - brings you to the start of the alternative list for the item.

20.15.6.1. Groups

There can be several groups in the interface. Each group may contain many items. Open the groups by clicking the  symbol at the left of the group name; this will reveal the underlying items. To hide the items for a group, click the  symbol.

20.15.6.2. Chart

Click Chart to produce a chart in the right frame based on the items in the various containers. The chart formats available are the same as those in Confirmit published reports.

20.15.6.3. Table

Click **Table** to produce a table in the right frame based on the items in the different containers.

20.15.6.4. Options

Click the **Options** button to open a page in the right frame with presentation options. Any changes you make and save here will be stored and used until you change them again.

Note:The *Chart type* and *Stacking* options only apply to charts.
The *Decimals* option applies to both charts and tables.
The *Content* option only applies to tables

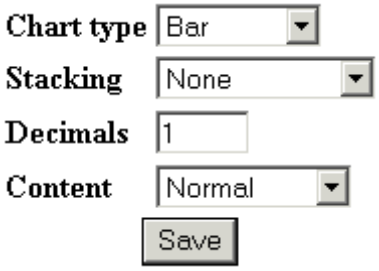


Figure 639 The Options

The options are:

- **Chart type -** choose between the different chart types available. This option only applies to charts. Note that the different item types have different default values.
- **Stacking -** choose to stack the data in different ways within the charts. Stacked will show the values in numbers, while 100% stacked will show the values in percentage. *None* is the default option. (This option only applies to charts.)
- **Decimals** - choose the number of decimals to use. (This option applies to both charts and tables.)
- **Content** - sets the percentage based on the data in rows or in columns. (This option only applies to tables.)

20.15.6.5. Containers

There are four containers: *Data, Column, Row* and *Filter*. You can drop a question into more than one container, but the effect will vary based on which container the element is dropped into. The containers have the following functionality:

20.15.6.5.1. Data

The element or elements will act as the basis for the calculations made in the pivot view right frame. Due to this, the container must contain at least one element. If for example you choose an item that has been answered by only 100 respondents in a survey that has 500 complete responses, then the result in the right frame will only be based on the 100. If you want to have all of the respondents as the basis, you must use an item that has been answered by all 500 respondents.

20.15.6.5.2. Column

The elements dropped into this container will be displayed as columns in the table/chart in the right frame.

You can choose to mask some of the elements - click the down-arrow to open a list of the elements in the item, and remove the X from the elements you do not wish to include. See the figure below (in the figure, the Under 18 element is de-selected).

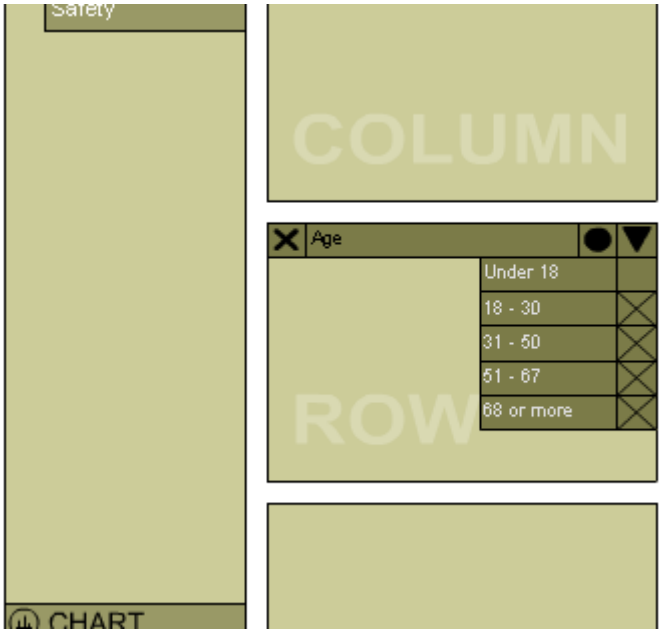


Figure 640 The Content Options

20.15.6.5.3. Row

The elements placed here will be displayed as rows in the table in the right frame. Masking can be applied the same way as for columns.

20.15.6.5.4. Filter

Any elements dropped here are used as filters for the result in the right frame. The figure below shows how you filter two elements in a list.

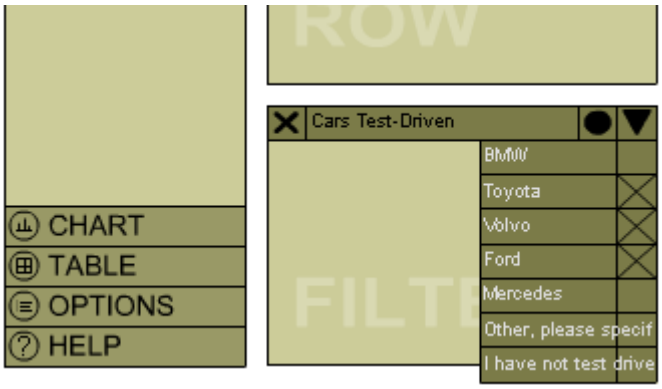


Figure 641 The Filter container

The figure shows that only Toyota, Volvo and Ford are to be used as the basis data for the view in the right frame. Click the down-arrow at the right side of the **Filter** container to open the list of filter alternatives for that particular item. If there are more than 9 alternatives to choose from, you can click the bottom arrows to view the next alternatives. Click on an item in the list to toggle the selection. Click the circle to invert the selection.

20.15.7. Containers and Items

The various items have different alternatives connected to them, and these can also vary based on which container the item is placed in. The application excludes some item types from certain containers. If you mix many items in the different containers, the results can be logically meaningless. Some basic rules for the use of different items are therefore implemented. The following sections explain how to use the different elements in the various containers.

20.15.7.1. Use of items in the Data container

The following items can be used in the data container:

- Time series.
- Single.
- Multi.
- Single elements from a grid.
- Open, numeric.
- Open float (recoded).
- Loop.

Note: Loops can be used in the data container, but may show a higher count because the data is obtained based on the iterations on the loop.

If you have responses on questions with numeric values (open text numeric, float (recoded variable), weighted single or weighted multi) as the basis for the data, then a variety of options are available to define how the data is to be displayed.

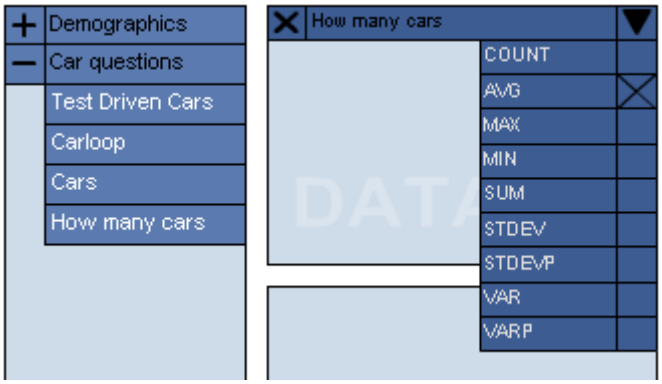


Figure 642 The data options for an open text numeric question

Choosing the different types will generate different results in the right frame.

- **COUNT** - returns the total number of responses.
- **AVG** - computes the average of all the values and cells referenced in the argument list. This is equivalent to the sum of the arguments divided by the count of the arguments.
- **MAX** - returns the highest value of the responses.
- **MIN** - returns the lowest value of the responses.
- **SUM** - computes the sum of all the responses.
- **STDEV** - returns standard deviation of a set of numbers treating these numbers as members of a population.
- **STDEVP** - returns standard deviation of a set of numbers treating these numbers as members of a complete population.
- **VAR** - estimates the variance of a sample of a population.

- **VARP** - calculates the variance of a set of numbers where each number is a member of a population and the set is the entire population.

For example: In the data container, there is an open text numeric question where the respondents have been asked how many cars they own. In the Column container is a single question – "Age", where the respondents have chosen which age group they belong to. In this case, choosing AVG will give the average of the number of cars owned within each age group. Choosing MAX will show the highest number of cars owned within each age group.

20.15.7.2. Use of items in the Column, Row and Filter containers

The following items can be used in the column and row containers:

- Time series.
- Single.
- Multi.
- Single elements from a grid.
- Loop.

Note: Time series will produce different alternatives than the other item types when placed in a container. Clicking the ▼ symbol will give you the days, weeks, months, quarters or years – based on what granularity you have chosen for the time series.

20.15.8. Masks

You can apply masks for questions in the *Column* or *Row* containers. Click the arrow in the upper-right corner of the container to reveal the alternatives that can be masked. All alternatives are chosen by default. Deselect any elements that you do not want to be shown in the right frame of the window.

20.15.8.1. The Difference Between Masks and Filters

When you use masking, the underlying data used for the view will be the same regardless of what masks are chosen. When filters are used, it only brings in the data connected to the filter.

For example:

The column container holds a single question – *Age*. If Masks are used to exclude two of the age groups and you display the result in the right frame, if you add the number of respondents, the result will not correspond to the totals of the data being reported on.

If you put filters on all but the two age groups that were masked, you will see the same data in the rows and columns except that in this case, the different elements will add up to the total. The two age groups that were excluded from the filter will not be part of the reporting data.

21. Recoding Data

Forms in a questionnaire can be converted to recoded variables. To do this:

1. Open the project.
2. Open the desired form (question) and open the Properties page.
3. In the Properties page, click the down-arrow beside the Variable Type field and select **Recoded Variable** from the list.
4. 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. These expressions must be programmed as a Boolean expression evaluating to true or false.

In addition to the forms in the questionnaire, you can use the system-generated variables interview_start, interview_end and status in recoded variables.

There are two types of recoded variables in Confirmit; SQL-based and JScript-based. Calculation depends on the type of variable is used. SQL based is the default variable type. To change to JScript-based, go to the Properties page and check the **JScript Based** box.

Enter the expressions in the answer list for the recoded variable. To create a variable based on another specific question, it may be helpful to use the expression builder. Activate this by clicking the question you wish to base your variable on when you are in the variable answer list.

21.1. Expression Syntax and Evaluation

Common for SQL and JScript based variable expressions is the way values of other questions are specified:

- **Single punch and open-ended questions –** Question id'
- **Multi punch and grid questions –** 'Question id' + '_' + 'Answer precode'

The value returned by such a reference is always a character. This is important to remember for rank order comparison. For strings, the value '11' is less that '2'.

21.1.1. SQL

For SQL-based variables, any legal SQL Server primitives can be used within the expressions. You are therefore recommended to become familiar with SQL if you intend to create advanced expressions.

Note: Confirmit 12 supports MS SQL Server 2005.
The Community Panel functionality requires MS SQL Server 2005.

Example 1:

You have an opentext question 'age'. You want to report on 'Young' and 'Old'. Add a single question and select Recoded var, then save. In the answer page enter this information:

English	Expression	Precode
Young	convert(int ,age)<40	Y
Old	convert(int ,age)>=40	O

convert() is an SQL method for type conversion.

Example 2:

You have a multi('car') with precodes 'chevy','buick','opel','volvo' and 'saab'. After the survey is complete you want to make an aggregated report on American vs. European cars. Add a multi question and select Recoded var, then save. In the answer page enter this information:

English	Expression	Precode
American car	car_chevy<>'0' OR car_buick <> '0'	A

European car	car_opel<>'0' OR car_vovlo<>'0' OR car_saab<>'0'	E

Example 3:

You want to make an online report on the respondents' status, similar to the WI interview progress. Add a single question and select Recoded var, then save. In the answer page enter this information:

English	Expression	Precode
Screened	status='screened'	s
Complete	status='complete'	c
Incomplete	status is null	i
Error	status='error'	e
Quota full	status='quotafull'	q

Note that if a respondent leaves the questionnaire, status is not set (status is null).

In addition to normal SQL syntax, the following conversions are performed by the Confirmit recoding engine:

From	To
==	=
&&	AND
||	OR
!=	<>
qn.in('a', 'b')	qn IN ('a', 'b')
parseInt(q1)	CASE WHEN ISNUMERIC(REPLACE(CONVERT(varchar, q1),',',' '))=1 THEN CONVERT(int, REPLACE(REPLACE(CONVERT(varchar, q1),CHAR(10),''),CHAR(13),'')) ELSE NULL END

21.1.2. JScript

JScript-based variables are recoded by looping through all the variables in a JScript environment. Hence all primitives of the JScript language are available from the expression.

When referencing other questions from the expressions, the calculation engine will create a JScript object based on the value in the database for the current respondent. This object has the following methods available:

Method	Return value
.getValue().toString().valueOf()	The ADO value of the ADO field method value(). This is a string except for interview_start and interview_end that return date.
.int()	ParseInt (getValue ())
.str()	New String ((getValue ())
.date()	New Date (getValue ())
.float()	ParseFloat (getValue ())

.int()	ParseInt (getValue ())
.in(param1, param2,…)	True if getValue() equals at least one of the parameters.
.Weight()	The weight associated to the value of the field. This is the weight used to report averages.

In the evaluation context, the following functions are also available:

Function	Description
average(p1, p2, …,pN)	The averages of the parameters: (p1 + p2 + … + pN)/N All the parameters are converted by parseFloat() before added. Parameters equaling an empty string are not included in the average calculations at all. The parameter is also ignored in the parameter count N.

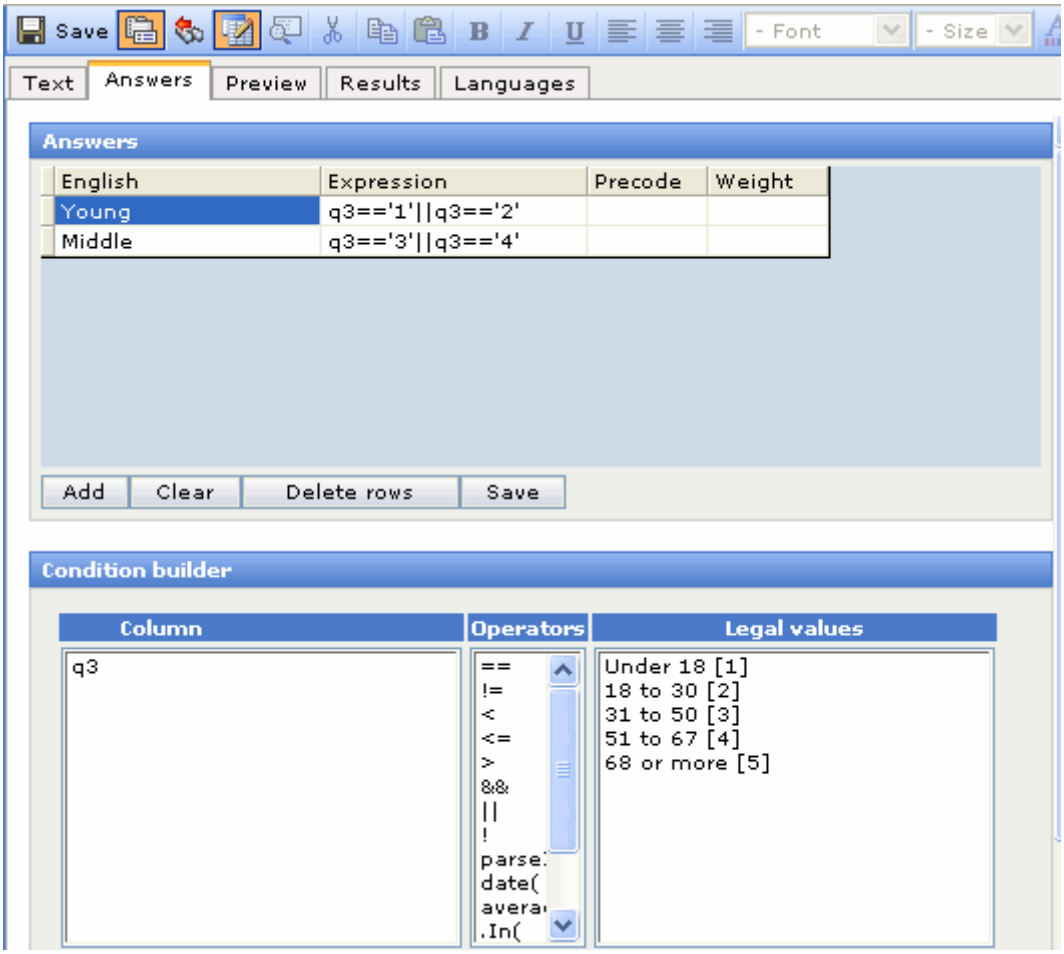


Figure 643 Variable definition with condition builder

After adding a recoded variable, you must always recompile the survey using either the **Incremental** or **Rebuild** options. To calculate the values in the recoded variable, go to the **Reporting > Calculate variables** menu command. You can do this manually as new respondents complete the survey, or you can define the variable calculation as a recurring task. For more information on this subject (go to Recoding Variables for Reporting Purposes on page 408 for more information).

22. Individual Reporting

Note: For some users, the Individual Reporting functionality will be subject to payment based on usage.

Note: This functionality will not be available for projects using the Optimized database format. The functionality is included in and superceded by Reportal. Refer to the Reportal User Guide for further information.

Individual Reporting is used for searching for and reporting on individual answers. This is opposed to the aggregated results in the tables and charts of online reporting, which report on the complete set of answers.

Remember that in most countries, reporting on the individual level requires some form of active approval from the individual respondent. We recommend that you follow the rules that apply to the markets and countries in which you operate.

Assume you are performing a survey in your company to find out which MS Office applications your employees use and what their user-level is. An individual report for that survey could look as in the example in the figure below.

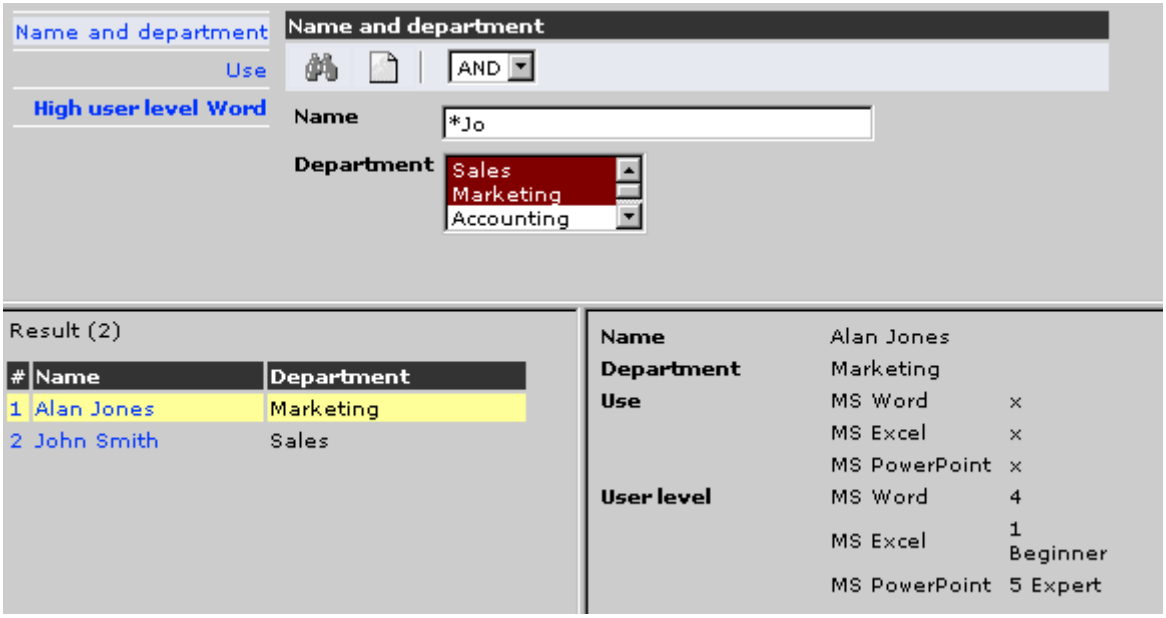


Figure 644 Example of an individual report

Here you can search to find a set of respondents, and go into each one of them to view their answers.

An individual report consists of three different parts:

- Search Definitions.
- The Hitlist.
- The Single View.

In “Search Definition” you specify which questions the users are to be able to use for searching.

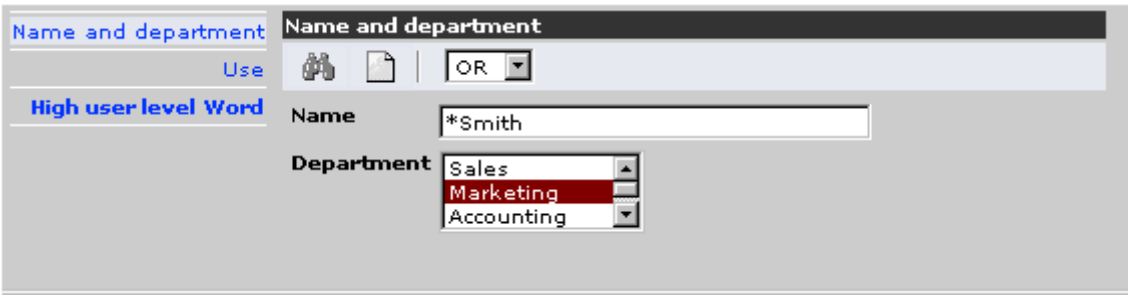


Figure 645 Search Definitions

The results are displayed as a list of respondents in the “Hitlist”, and you select the questions that are to be displayed in the Hitlist as columns.



Figure 646 Hitlist

When you select one of the respondents in the Hitlist by clicking a link, a Single View is opened, showing this particular respondent’s answers to the questions you set up.

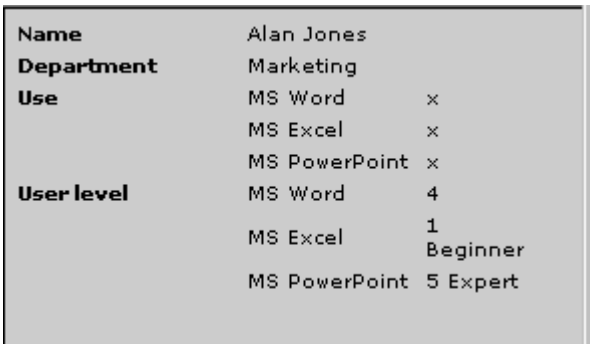


Figure 647 Single View

The layout of an individual report is very flexible. There are wizards that will help you set up the report, and you can edit the generated HTML code.

Individual reporting can only be used on variables in the questionnaire tree. As in aggregated reporting, variables from the respondent list must be included as background questions in the questionnaire before interviewing starts if they are to be available for use in individual reporting.

Individual reports can be made accessible in the End User Interface for people who are not Confirmit users.

22.1. Building an Individual Report

To access Individual Reporting:

1. Open the project for which you wish to create an Individual Report.
2. Go to the **Reporting > Individual Reporting** menu command.

   The routing of the questionnaire appears, as shown below, along with the elements of the individual reporting.

- To open the routing, single-click the **Routing** folder.

- To open all folders, right-click on the project name (the top row in the tree) and select **Expand tree**.

An individual report consists of one or more search definitions, one hitlist and one single view. A wizard will help you build your Individual Report, but you must first define the Search Definition(s) (go to Search Definitions on page 474 for more information), the Hitlist (go to Hitlists on page 478 for more information) and the Single View (go to Single Views on page 482 for more information).

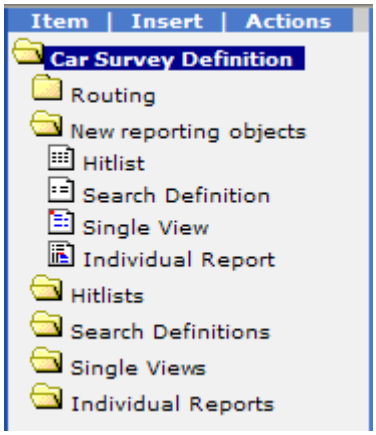


Figure 648 Example of the Individual Reporting tree

22.2. Search Definitions

A Search Definition is the criteria on which the user can choose to filter the Hitlist. Only those respondents who satisfy the selection(s) made in the search definition will be shown in the hitlist.

To create a new search definition:

1. In the report tree, drag a **Search Definition** item from the **New reporting objects** folder and drop it on the **Search Definitions** folder, or go to the **Insert > Search Definition** menu command at the top of the tree.

   An item called **Search definition 1** is added to the Search Definitions folder. The new Search Definition item has a properties window where you can rename the item and assign certain properties. To open the window, double-click on the Search Definition or right-click and choose **Edit** from the menu (go to The Search Definition Object's Properties on page 475 for more information).

   To define the fields that are to be included in a search criteria:

2. Drag questions from the routing onto the new **Search Definition** folder.

   The order of the questions in the folder will define the order of the questions when shown to the user in the Individual Report.

You must expand multi questions and grids (by clicking on them) before you can drag the individual elements into the Search Definition folder. There will then be created one node for each item in the answer list. You can treat these nodes as if they were ordinary single questions: For multi questions each item in the answer list is basically a single question with a Yes or No answer (or TRUE/FALSE), and for grids each item is a single question with the scale as the answer list.

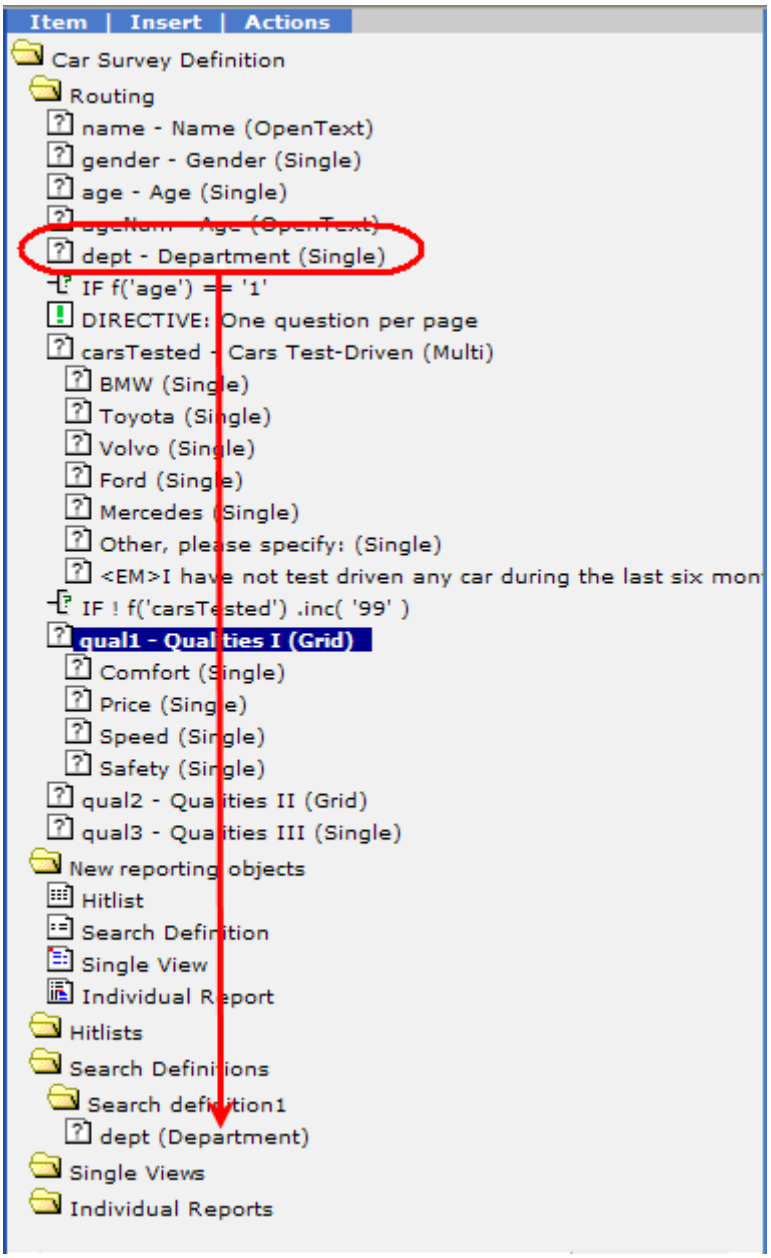


Figure 649 Dragging questions into a new Search Definition object

In the figure above the routing is expanded, the dept question has been dragged into the **Search definition 1** folder, and the multi "carsTested" and grid "qual1" are expanded into single question items.

22.2.1. The Search Definition Object's Properties

To open the Search Definition object's Properties page:

- Right-click on the object and select **Edit** from the menu, or click on the object to select it and go to the **Item > Edit** menu command.

  The Properties page opens at the General tab as shown below.

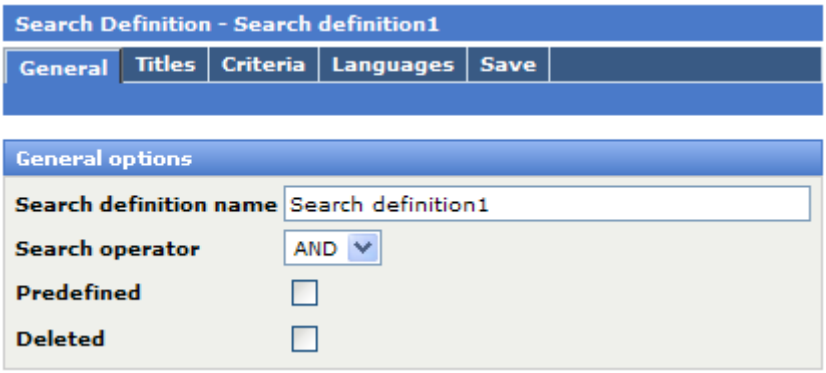


Figure 650 The Search Definition object's Properties page, General tab

22.2.2. The General Tab

When you open the Properties page, it opens at the **General**tab as shown above.

The properties on this tab are as follows:

- **Search definition name** - the name of the Search Definition item. To change the name, click in the field and type in the desired name, then click **Save** the save the changes.
- **Search operator** - in search definitions based on more than one question, specify which search operator is to be used between items. The operator options are “AND” or “OR”. Default is “AND”.
- **Predefined** - if you check this box, then there must be one or more default values specified for every field in the search definition. The report user will not be able to change the search criteria on a predefined search definition in a report.
- **Deleted** - check this box to flag the object for deletion, then click **Save** to delete the object.

22.2.3. The Titles Tab

On the Titles tab you can set the title of the search definition in all the project languages. There will be one text box for each active language.

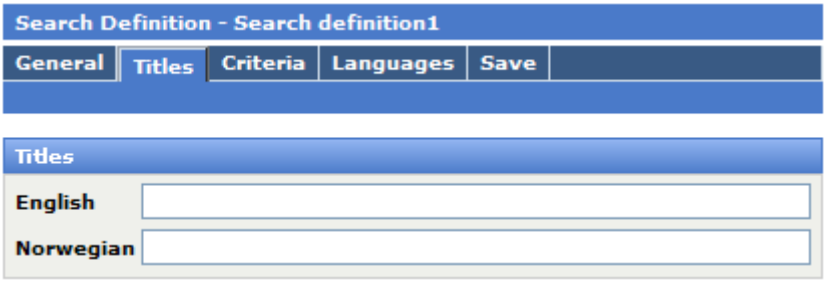


Figure 651 Example of the Search Definition object's Properties page, Titles tab

On completion, click **Save** to save the changes.

22.2.4. The Criteria Tab

The properties displayed in this tab depend on the number and type of questions that have been dragged into the Search Definitions item (go to Search Definitions on page 474 for more information). The example in the figureshows the properties for an Open Text question (name), a Single (dept), a Multi (carsTested) and a Grid (qual1).

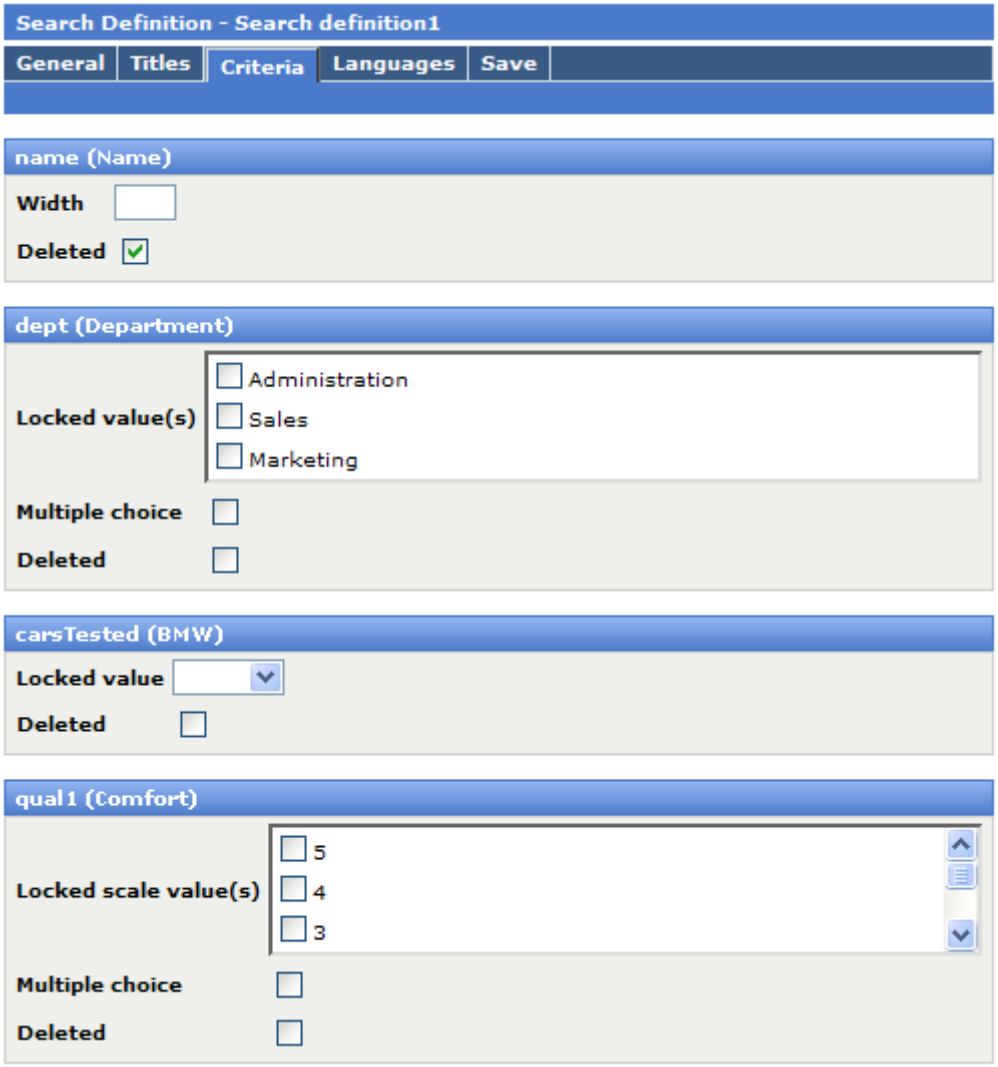


Figure 652 Example of the Criteria tab for a selection of question types

The properties available are as follows:

- For an Open Text question
  - **Width** - the size of the textbox (in number of characters) where the user specifies the open text search.
- For a Single question
  - **Locked value(s)** - if you select one or more values here, then the criteria will be locked to these values. In this case, when this search definition is used, the search will always be done on these values. If all fields are locked you can set the search criteria to be Predefined, which means that the link to the search definition will open a list of respondents directly in the hitlist without the user having to specify the search.
  - **Multiple choice** - check this box to give the user the opportunity to select multiple values to search on. The search will then search for all the values selected.
- For a Multi question
  - **Locked value(s)** - If you select one or more values here, then the criteria will be locked to these values so that when using this search definition the search will always be done on these values. If all fields are locked you can set the search criteria to be Predefined. In this case, the link to the search definition will present a list of respondents in the hitlist, without the user having to specify the search.
- When using a Grid question you use one variable for each item in the answer list. This will be like a normal single question with the scale of the grid as the answer list. The properties are therefore the same as the properties of a single question

- **Deleted** - this property is available for every type of item. Check this box to flag the item for deletion, then save.

22.2.5. The Languages Tab

When working with a multi-lingual project, you may wish to edit the texts and titles for only a selection of the available project languages. In this case, select the working languages here.

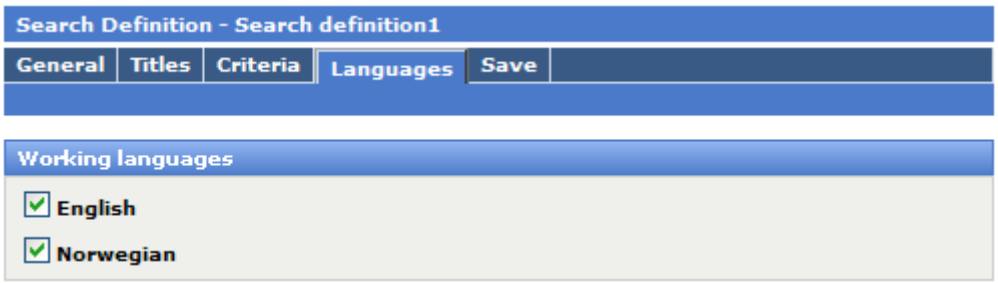


Figure 653 Example of the Language tab

Check the boxes for the required languages, then save the changes.

22.2.6. Search Criteria within the Search Definition

You may also define search criteria separately for each question in the Search Definition. To open the Properties page for an individual question:

- Double-click the question in the Search Definitions item, or right-click on it and go to the **Item > Edit** menu command.

The properties available for the individual question types are the same as those displayed for the complete Search Definitions item, except that the properties on the General tabs for the individual questions are gathered on the Criteria tab for the Search Definition item (go to The Criteria Tab on page 476 for more information).

22.3. Hitlists

In the hitlist, you specify how the table displaying the results from the searches is to look and which fields (questions)are to be included.

To create a new hitlist:

1. Go to the **Reporting > Individual Reporting** menu command.
2. In the routing tree, either drag a **Hitlist** item from the **New reporting objects** folder and drop it on the **Hitlists** folder, or go to the **Insert > Hitlist** menu command at the top of the tree.

   An item called **Hitlist 1** is added to the **Hitlists** folder.

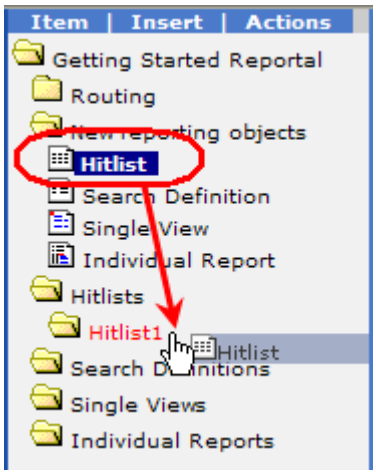


Figure 654 Creating a new Hitlist

The new Hitlist item has a properties window where you can rename the item and assign certain properties. To open the window, double-click on the Hitlist or right-click and choose **Edit** from the menu (go to The Hitlist Properties General Tab on page 480 for more information).

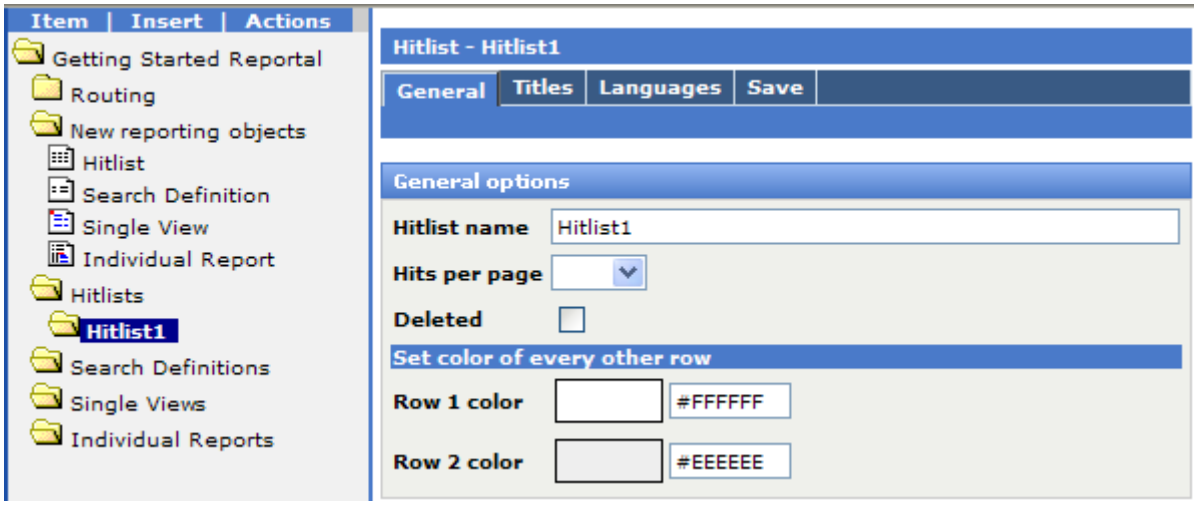


Figure 655 The Hitlist Properties sheet

To define the fields that are to be included in a hitlist:

3. Drag questions from the routing onto the **New Hitlist** folder.

   The order of the questions in the folder will define the order of the questions when displayed to the user in the Individual Report.

Note: In the Optimized Database format (go to The Optimized Database Format on page 24 for more information), 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. Loops will therefore not be visible in Single views (go to Single Views on page 482 for more information) or respondent records. See also the Reportal User Guide for additional information.

You must expand multi questions and grids (by clicking on them) before you can drag the individual elements into the Hitlist folder. There will then be created one node for each item in the answer list. You can treat these nodes as if they were ordinary single questions: For multi questions each item in the answer list is basically a single question with a Yes or No answer (or TRUE/FALSE), and for grids each item is a single question with the scale as the answer list.

22.3.1. The Hitlist Properties General Tab

When you open the Properties page, it opens at the **General** tab as shown above.

The properties available on this tab are as follows:

- **Hitlist name** - the name of the hitlist as shown in the report tree. To change the name, click in the field and type in the desired name.
- **Hits per page** - limits the size of the hitlist to a specified number of hits per page. If the hitlist is larger than the value set here, a button will be included in the list to enable the user to go to the next/previous page of hits. Click the down-arrow beside the field to open a list of options, and select the desired option from the list.
- **Set color of every other row** - here you may specify two background colors for the rows in the hitlist so the rows are displayed in alternating colors. Specify the HTML color codes directly in the fields, or double-click in the preview boxes to open a pop-up window with a color chooser where you can pick a color. All the colors available in the color chooser are "browser-safe" colors. Browser-safe colors display consistently across most browsers, operating environments and monitors.

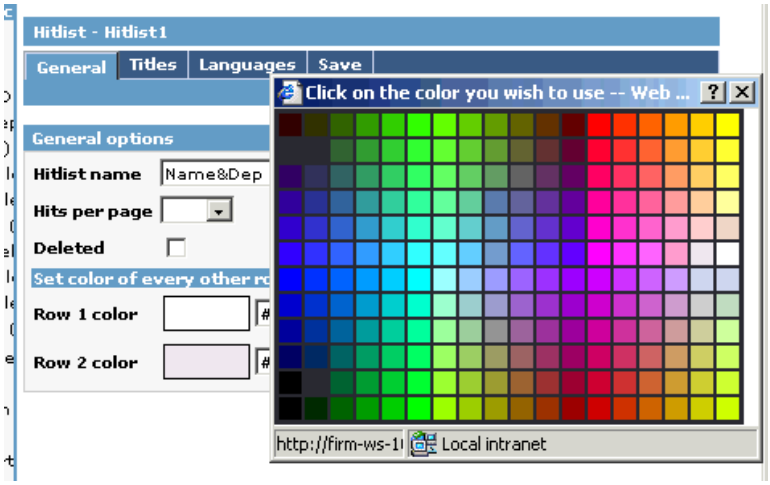


Figure 656 The Hitlist properties – General – Color chooser

22.3.2. The Titles Tab

On the Titles tab, type in the title for the Hitlist in the various languages specified for the project. There will be one text box for each active language.

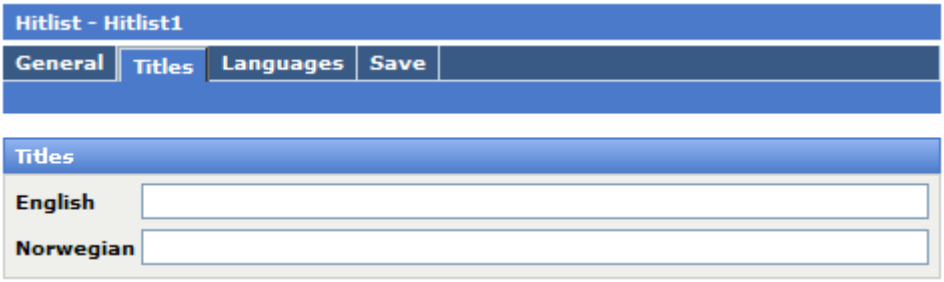


Figure 657 Example of the Hitlist object's Properties page, Titles tab

On completion, click **Save** to save the changes.

22.3.3. The Languages Tab

When working with a multi-lingual project, you may only wish to edit the texts and titles for a selection of the languages. In this case, select the working languages here.

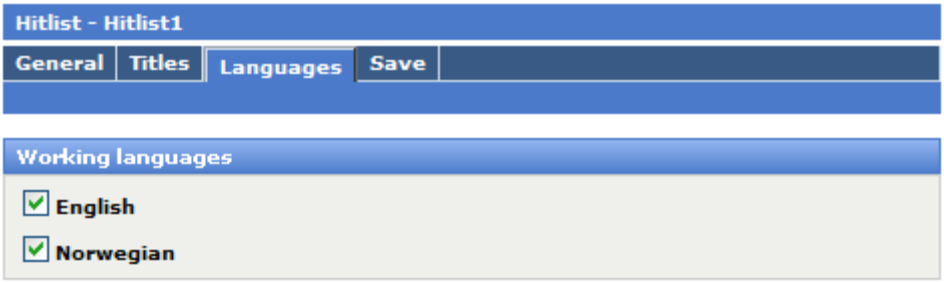


Figure 658 Example of the Hitlist Properties - Language tab

Check the boxes for the required languages.

22.3.4. Hitlist Columns

You can edit the settings for the hitlist columns. To do so:

- Double-click on the questions in the hitlist folder.

  The hitlist Column properties page opens.

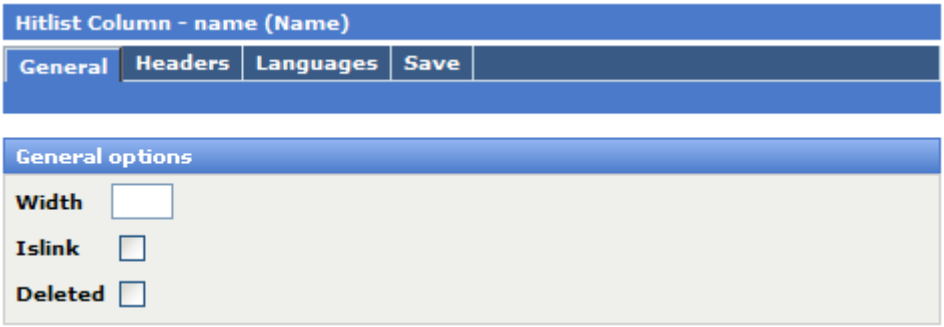


Figure 659 The Column Properties page for a hitlist question

22.3.4.1. The Hitlist Column Properties General tab

When you open the Hitlist Column Properties page, it opens at the **General** tab as shown above.

The properties on this tab are as follows:

- **Width** - specify the width of the column. The default value will adjust the column to show the text in a cell without wrapping it.
- **IsLink** - check this box to show the value in the column as a link. When a user clicks on the link, that respondent's answers will be shown in the single view.
- **Deleted** - check this box to flag the item for deletion, then save.

22.3.4.2. The Headers Tab

Here you can specify texts for the hitlist column headers for the active languages.

22.3.4.3. The Languages Tab

When working with a multi-lingual project, you may wish to edit the texts and titles for only a selection of the available project languages. In this case, select the working languages here.

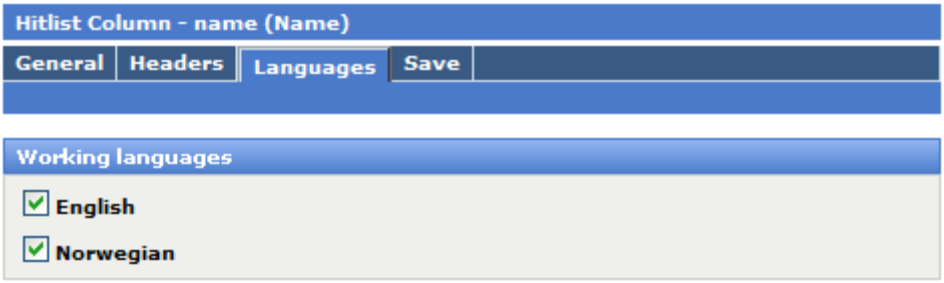


Figure 660 Example of the Hitlist Columns Languages tab

Check the boxes for the required languages, then save the changes.

22.4. Single Views

The Single View functionality enables you to include a facility in your questionnaire and resulting reports that allows viewers to see the results provided by an individual respondent. You can define which of the answers from the questionnaire are to be made available to the viewers, and this is done under the **Reporting > Individual Reporting** menu command.

Note: You can only create one single view for each individual report.

22.4.1. How to Create a Single View

To create a new Single View:

1. Go to the **Reporting > Individual Reporting** menu command.
2. In the report tree, drag a **Single View** item from the **New reporting objects** folder and drop it on the **Single Views** folder, or go to the **Insert > Single View** menu command at the top of the tree.

   An item called **Single view1** is added to the Single Views folder.
3. Double-click on the Single View item or right-click and choose **Edit** from the menu to open the Properties dialog.

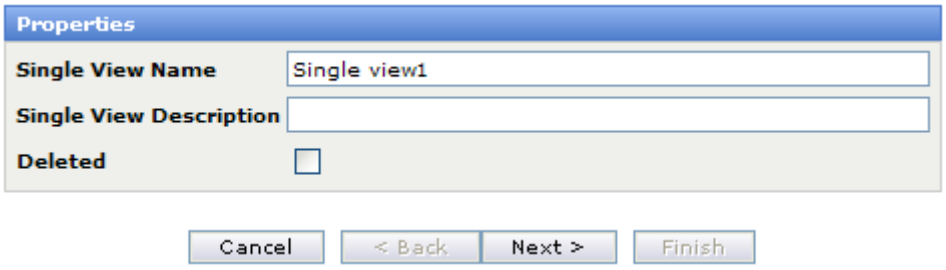


Figure 661 The Single View Wizard - Step 1

The fields and buttons in this dialog are as follows:

- **Single View Name** - the name of the Single View item. To change the name, click into the field and edit the contents as required.
- **Single View Description** - add a more detailed description of the Single View as necessary (may be left empty).
- **Deleted** - check the box and save to soft-delete the item.
- **Cancel** - click to move one step back in the wizard.
- **Next** - click to move on to the next step in the wizard.
- **Back/Finish** - these buttons are not active on this page.

3. Change the name and/or add a description as necessary.

4. Click **Next**.

   The question selection page opens.

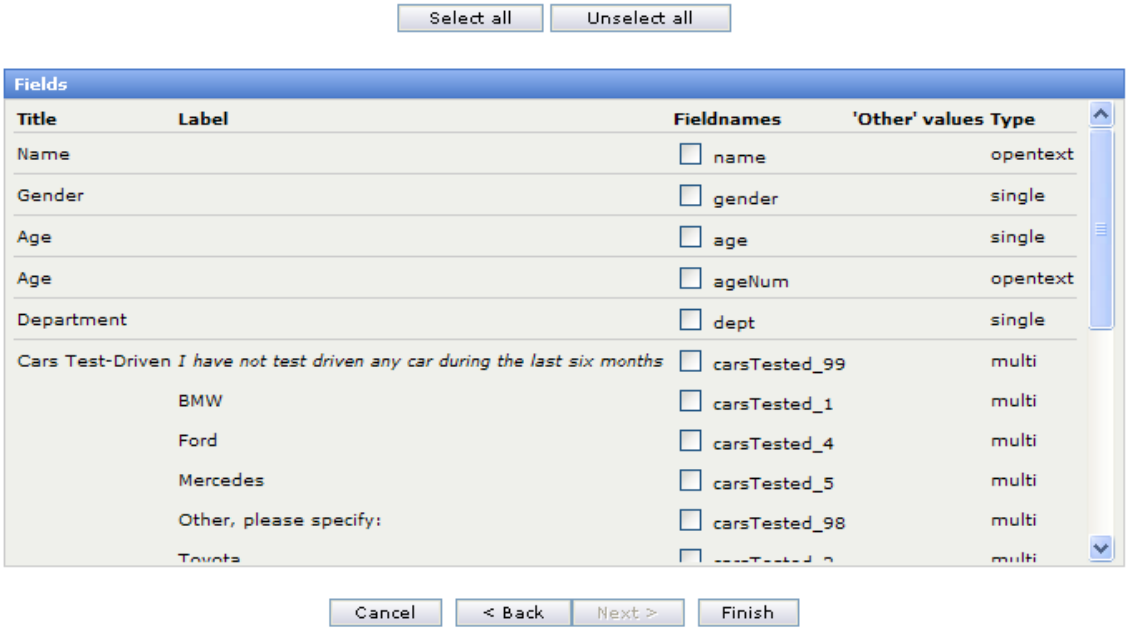


Figure 662 The Single View Wizard – Step 2

This window displays all the questions and answer options available in the questionnaire. Here you select the fields (questions and variables from the questionnaire) that you wish to be displayed in the Single View when the user clicks a link in the hitlist. The HTML file will be generated automatically for the chosen fields. The buttons and fields/columns are as follows:

- **Select all** - click to select all the fields.
- **Unselect all** - click to deselect all the fields.
- **Title** - the title of the question.
- **Label** - [multi and grid questions] the label of the answer alternatives**.**
- **Fieldnames** - The variable names used in the SQL database. Defaults to question id for single and open questions; question id + underscore + precode for multi and grid questions.
- **'Other' values** - [single, multi, grid] use this syntax to include the answer to an "other, specify" text box in a question
- **Type** - the question type: open text, single, multi, grid.
- **Cancel** - click to move one step back in the wizard.
- **Next** - this button is not active on this page.
- **Finish** - click to save the chosen settings and go to the Single View Wizard menu (go to The Single View Editor on page 484 for more information).

5. Make the required settings and click **Finish**.

   The selection box opens.

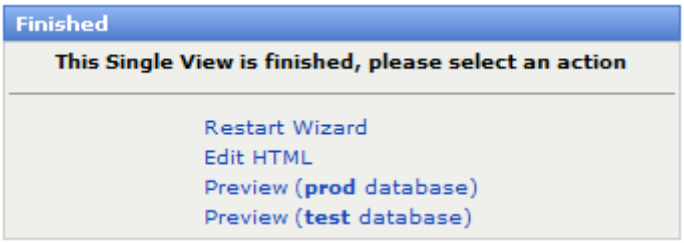


Figure 663 The action select box

6. To preview the result, click the appropriate link.

22.4.2. The Single View Editor

1. Double-click on the new single view to open the **Single View Wizard** menu, or right-click on the object and choose **Edit** from the menu.

   The Single View Editor opens as shown in the example below.

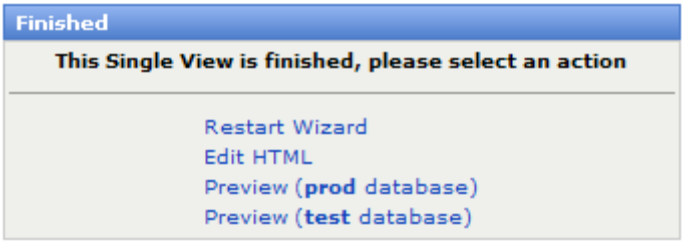


Figure 664 The Single View Wizard menu

2. Click on the **Edit HTML** link to open the Single View Editor page.

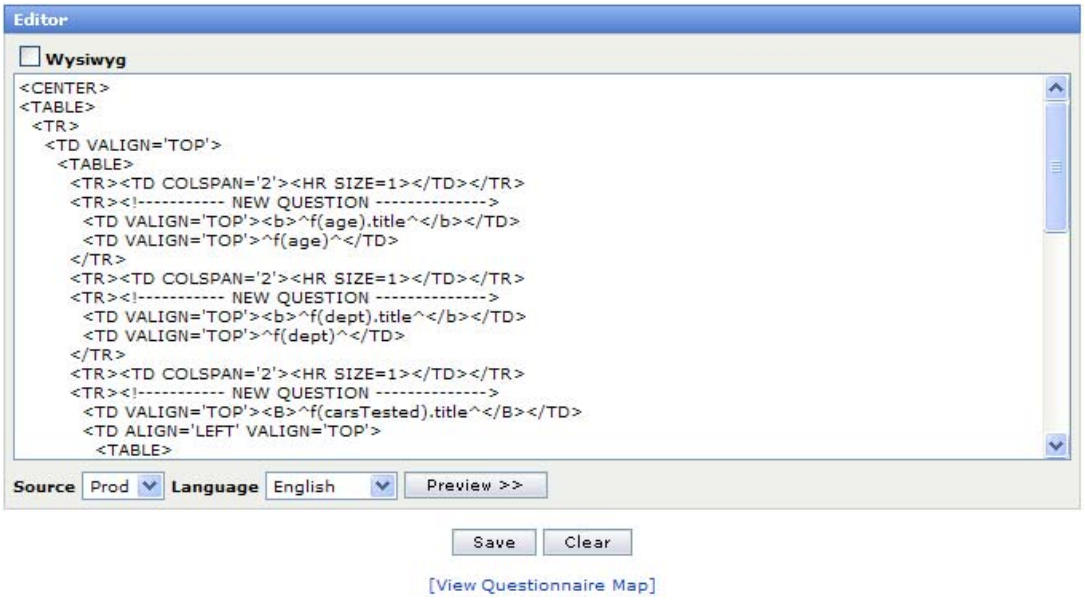


Figure 665 Example of the Single View Editor page

The fields and check-boxes are as follows:

- **Wysiwyg** - (requires Internet Explorer 5.5 or 6.0) “What you see is what you get” (as shown below). Check this box to display the labels and field names, and open the functionality that allows you to edit the Single View by changing these directly. You will also be able to apply some layout modifications to the Single View.
- **HTML definition** - the HTML code of the single view.
- **Source** - the databases are created when you compile a survey. As the compilations may have been performed at different times for the production and test databases, there may have been changes made to the questionnaire in between, so the test and production databases may contain different fields. Use this field to select which of the databases is to be used to provide the fields (questions).
- **Language** - select a language to be used when previewing the single view. The list consists of the active languages for this survey.
- **Preview** - the preview shows the field references you have used in the HTML definition. The responses from the first respondent will be used in the preview (go to Preview on page 488 for more information).

When you check the Wysiwyg box, the Single View Editor will be displayed as shown in the example below.

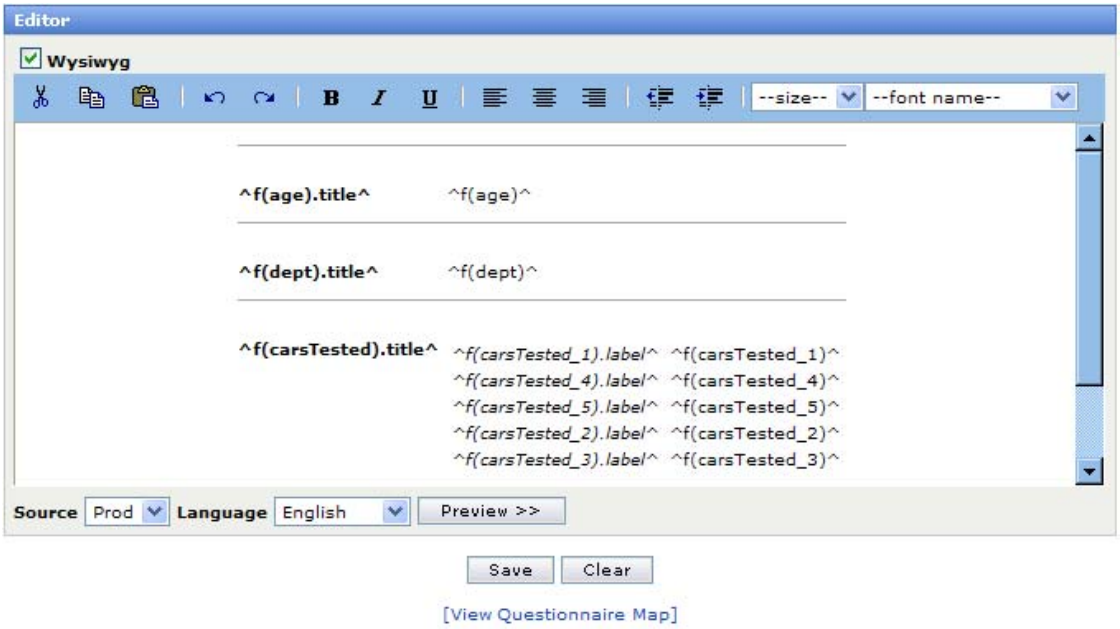


Figure 666 Example of the Single View Editor in Wysiwyg mode

22.4.3. Including Respondent Data in a Single View

You can also include respondent data, for example, respid: f(respondent.respid); sid: f(respondent.sid) in the Single View. The unique respondent link can be retrieved with f(respondent.link) (go to Synchronization on page 335 for more information).

22.4.4. The Questionnaire Map

If you wish to include titles, labels, field names and values in the single view, you use syntax similar to that used for response piping in a survey. Include a caret (^) in front of and after an expression with the f function, for example ^f(name)^ for the answer to the question with question id "name". To help you to find the correct expressions, a questionnaire map page is available. From here you can copy strings directly into the HTML editor. To open this map:

1. Double-click on the Single View element or right-click and select **Edit**, to open the Single View Wizard menu.
2. Click the **Edit HTML** option.
3. On the Single View Editor page, click the **View Questionnaire Map** link (located at the bottom of the page).

   A new window opens, as shown in the example below, with a table that contains all the questions from the survey. The table lists the variables you may use in your single view HTML definition.

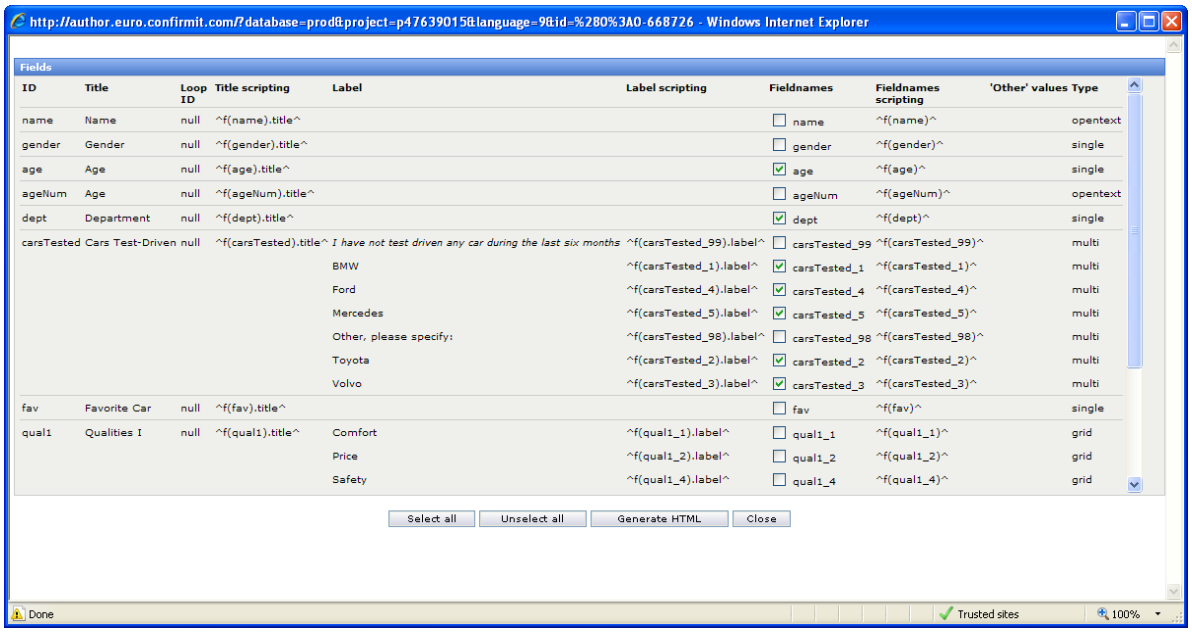


Figure 667 Example of the Questionnaire Map window

Here you can select and copy any of the scripts, and paste them into the HTML editing page. The columns are as follows:

- **ID** - the question ID of the question.
- **Title** - the title of the question.
- **Loop ID** - the loop ID of the loop.
- **Title scripting** - use this syntax to refer to the question's title in the HTML definition.
- **Label** - [multi and grid questions] The label of the answer alternatives.
- **Label scripting** - [multi and grid questions] Use this syntax to refer to the label of the answer alternative in the HTML definition.
- **Fieldnames** - the variable names used in the SQL database. This defaults to the question ID for single and open questions, and the question ID + underscore + precode for multi and grid questions.
- **Fieldnames scripting** - use this syntax to refer to the answer to that question in the HTML definition.
- **"Other" values** - [single, multi, grid] Use this syntax to include the answer to an "other, specify" text box on a question.
- **Type** - the type of question this is (open text, single, multi or grid).
- **Select all** - click to select all the fields.
- **Unselect all** - click to deselect all the fields.
- **Generate HTML** - click to generate the HTML definition of the Single View with the fields you have chosen in the Questionnaire Map. You will be brought to the Single View Editor. If you click **Save** here, the fields you chose for the Single View in the Single View Wizard Step 2 will be replaced by the new HTML definition. The system will give you a warning as shown in the figure below.

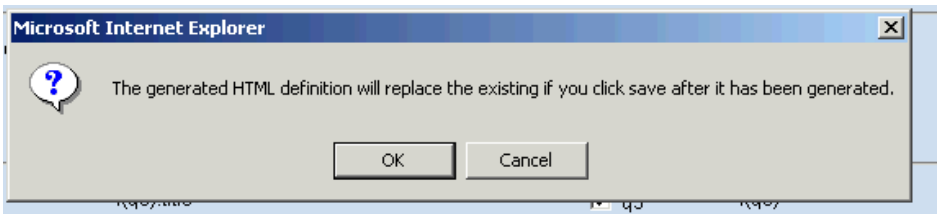


Figure 668 The HTML Definition Warning

22.4.5. Preview

Select one of the **Preview** links from the **Single View Wizard** menu or click Preview on the Edit HTML page to display a preview of your HTML definition. The preview will be shown with either production data or test data, and will display the values from the first respondent in the database. The figure shown below is the preview of the code shown on the Single View Editor page (go to The Single View Editor on page 484 for more information)

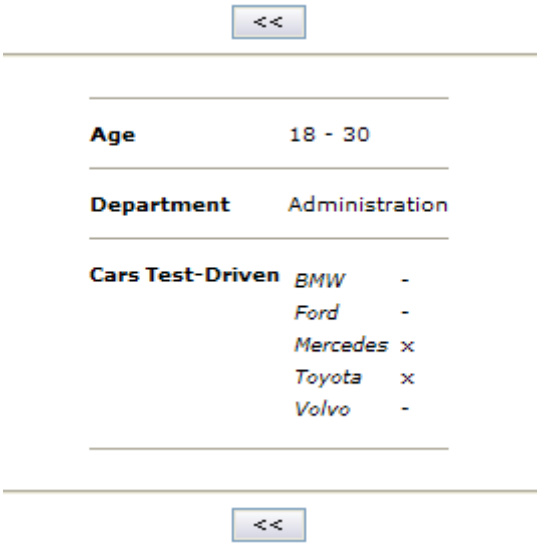


Figure 669 Preview based on the values from the survey database

For single questions and grids, the labels from the scale/answer list are displayed as results. For open text questions the text answered is displayed. For the items in a multi question the codes "x" for answered (True) and "–" for not answered (False) are used.

22.5. Individual Reports

When you have defined one or more search definitions, a hitlist and a single view, you can create an individual report. You can define as many individual reports as you require in a project, combining different search definitions, hitlists and single views to achieve a variety of results.

To create a new Individual Report:

- In the report tree, drag an **Individual Report** item from the **New reporting objects** folder and drop it on the **Individual Reports** folder, or go to the **Insert > Individual Report** menu command at the top of the tree.

  An item called **Individual report1** is added to the Individual Reports folder. The new item has a wizard to assist you with setting up the report. To open this, double-click on the item or select it and go to the **Item > Edit** menu command at the top of the tree (go to The Individual Report Wizard on page 488 for more information).

22.5.1. The Individual Report Wizard

To open the Individual Report wizard, double-click on the Individual Report item in the report tree, or select it and go to the **Item > Edit** menu command at the top of the tree. The wizard opens as shown below.

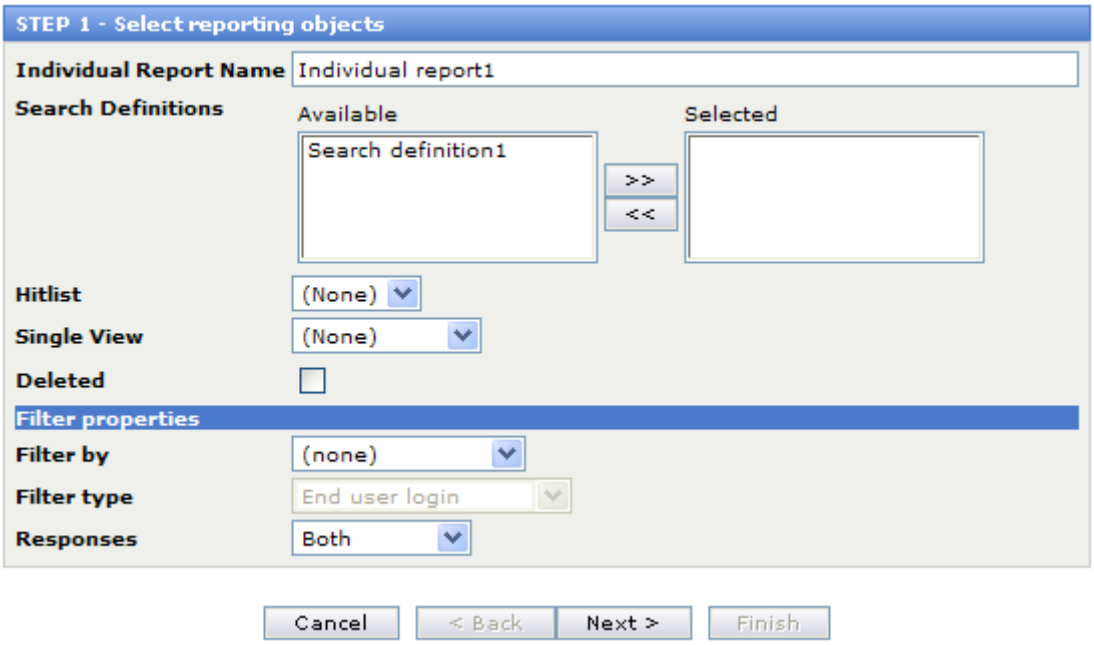


Figure 670 The Individual Report Wizard

This wizard has four steps.

22.5.1.1. Step 1 – Select Reporting Objects

In Step 1 of the wizard, give your individual report a name and select one or more search definitions (go to Search Definitions on page 474 for more information), one hitlist (go to Hitlists on page 478 for more information) and one single view (go to Single Views on page 482 for more information) to use in your individual report. Note that these items must be created before you can select them.

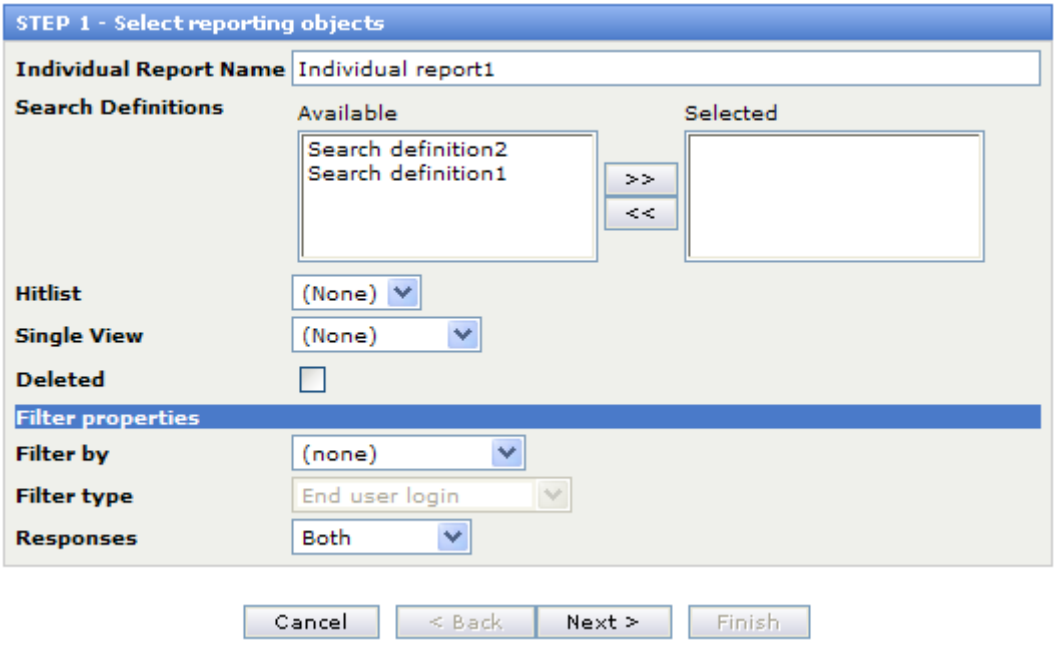


Figure 671 Individual Report Wizard Step 1 - Select reporting objects

1. Click into the Individual Report Name field and edit the name as required.

2. The search definitions created for the project are listed in the Available column. Using standard Windows techniques, select the required search definitions in the Available column and click the **>>** button to move them to the Selected column. You can also move individual search definitions between the columns by double-clicking them. The search definitions will appear in the order in which they are selected and moved into the Selected column. If you wish to change the order, click one of the items in the Selected column, then press the **CTRL** key and the up or down arrow buttons on your keyboard to move it.
3. To select the required Hitlist and Single View, click on the down-arrow beside the appropriate field and select the required item from the drop-down list.

It is possible to filter results based on respondent status, and create "filters" that are linked to values associated with the End User who will access the Individual Report. The filters will only be active for protected reports.

4. Any single or open question can be used as a filter. If you wish to use this facility, click on the down-arrow beside the field and select the required question from the drop-down list. The "Filter by" question will be compared to one or more values associated with the End User who is logged in. For single questions the precode is used in the comparison.
5. The "Filter by" value will be compared to one or more value(s) determined by the selected Filter type.
   - **End user login** - The End User will only see responses where the value of the "Filter by" question matches his/her username.
   - **End user permission** - If "End user permission" is selected, a Permission link will appear in the Users tab in the End Users… - Reports properties page. The End User will only see responses where the value of the "Filter by" question matches a value set up in the new Permission dialog (go to Administration of End Users on page 499 for more information). If more than one value is used, separate them using the semi colon character. The values are set per End User.
6. The Responses field allows you to show only **Completes**, only **Incompletes** or **Both**. Click on the down-arrow beside the field and select the required item from the drop-down list.
7. When you have made your selections, click **Next>>**.

On completion, click **Next** to go to step 2 in the wizard.

22.5.1.2. Step 2 – Set a Title for Each Language

In step 2 you must specify a title for the report for each of the active survey languages. In the example below, the survey uses two languages; English and Norwegian.

Click into the appropriate field and type in the required title.

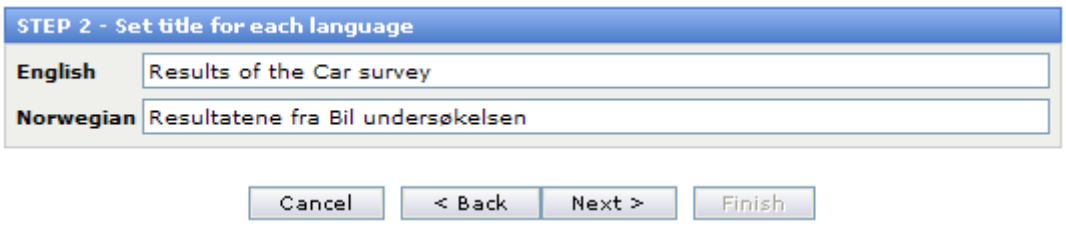


Figure 672 The Individual Report wizard Step 2 - Setting titles for each language

On completion, click **Next** to go to step 3 in the wizard.

22.5.1.3. Step 3: Select the Layout and Set the Properties

In step 3, select the layout for the frames the individual report is to consist of. The page is as shown below.

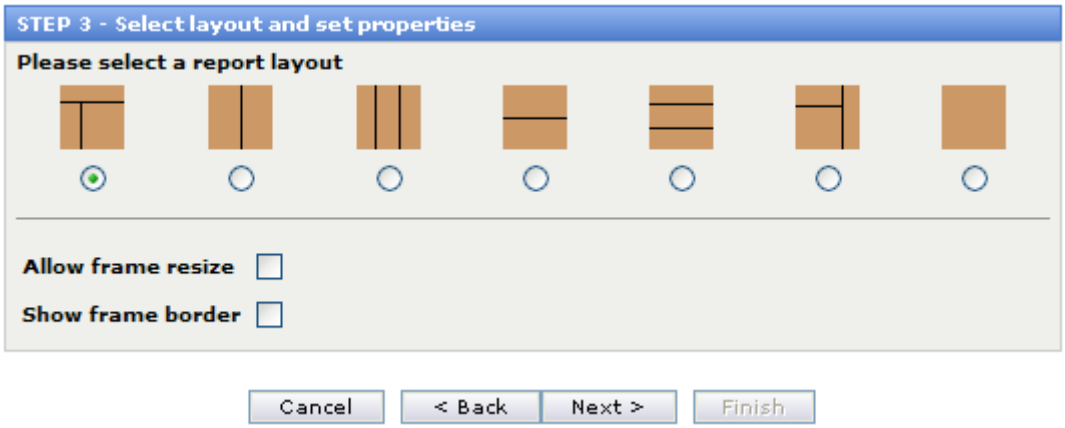


Figure 673 Individual Report Wizard Step 3: Select layout and set properties

If you select one of the layouts with three frames, all the three parts (search definitions, hitlist and single view) will appear in the same browser window. If you select a layout with 1 or 2 frames, the user can switch between them by clicking on links.

The properties are as follows:

- **Allow frame resize** - check the box if you wish to allow the user to resize the frames by dragging the frame borders.
- **Show frame borders** - check the box to display borders between the frames.

Make the required selections, then click **Next** to go to step 4 in the wizard.

22.5.1.4. Step 4: Set Properties for Each Frame

In this step you specify which part of the report should be in which frame, the size of the frames, and the background color and background image.

Note that the layout of the window will depend on the selections you have made in step 3 of the wizard.

1. Click a frame in the "preview" window towards the top of the page to select that frame.

   The colored area moves to the selected frame, and all settings you make will apply to that frame.

2. Select the frame's content (search definitions, hitlist or single view).
3. Specify the size of the frame.

   The size is specified as a percentage. For "full width" frames such as that currently selected in the figure below, this will be a percentage of the total page height. For "partial width" frames (for example the remaining two frames below), this will be a percentage of the total width. Note that the sizes of frames on the same axis must add up to 100%, so changing one of them will update the others. I.e. In the example in the figure below, if you set one of the two lower frames to 50% and then set the other to 60%, the first frame will reduce to 40%. The size of the frame in the preview will be updated as you select the size.

4. Choose a background color for the frame.

   Here you can either specify an HTML code directly, or double-click the color preview box to open a color chooser. All the colors available in the color chooser are "browser-safe" colors. Browser-safe colors display consistently across most browsers, operating environments and monitors.

5. If you wish to display a background image, specify the URL to the image file. This is optional.

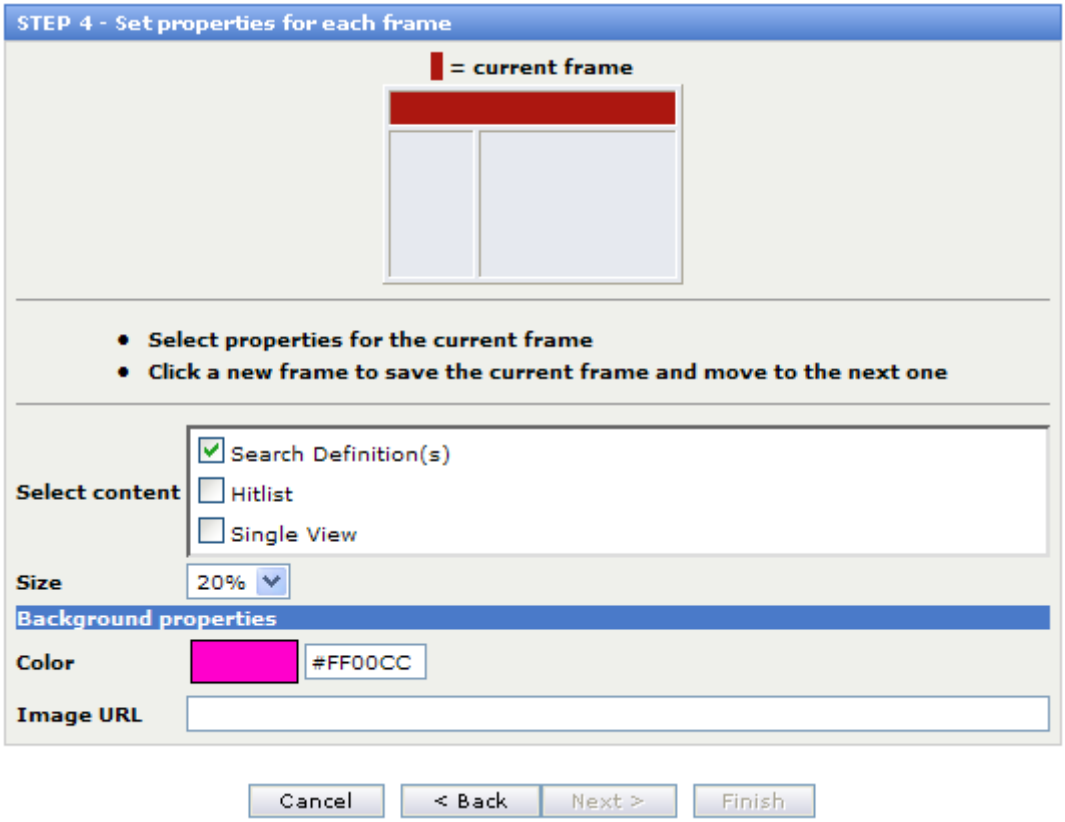


Figure 674 Individual Report Wizard Step 4 - Setting the properties for each frame

6. When you have finished setting the properties for the first frame, move to a new frame by clicking on it in the preview.

   Previously selected content will now not be available (it will be presented in red text and the checkbox will not be accessible).

7. Make the required settings for this frame, then move on to the next as appropriate.

   Note that if you move the mouse pointer onto content that is already selected (red text), then the frame that the content is allocated to will appear in yellow in the preview.

8. When you have set properties for all the frames, click **Finish** to save all your settings and generate the HTML.

22.5.2. Modifying an Individual Report

When you click **Finish** after you have completed the wizard, the HTML is generated. The dialog shown below then appears. If you wish later to modify the HTML, double-click on the Individual Report or right-click on it and select **Edit** to open the dialog.

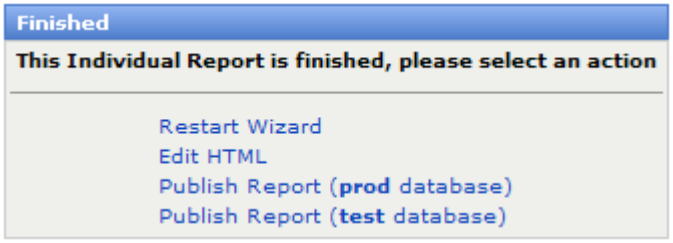


Figure 675 The Finished Report dialog

If you wish to modify the HTML, you have two options; you can restart the wizard, or you can edit the generated HTML. If you choose to restart the wizard, it opens at step 1 with the previous settings intact. You can repeat the procedure from the beginning, changing settings as necessary. Exit the wizard by clicking **Finish**.

You may wish to do some modifications to the HTML code in the frames that is not possible in the wizard. To do so, choose **Edit HTML** to open the Individual Report Editor. The page shown in the example below opens.

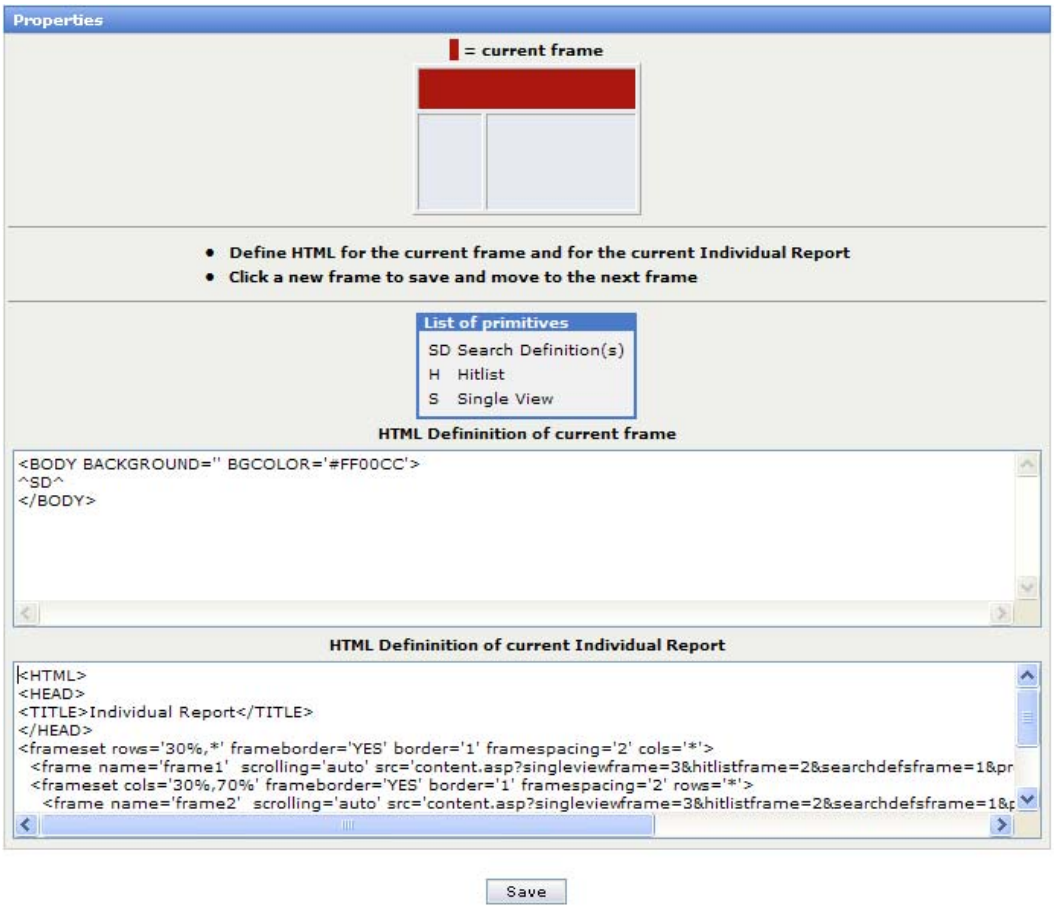


Figure 676 Example of the Individual Report HTML Editor

Here you can edit the HTML code for the frames and the individual report. There is one text box for the HTML code of the frame, and one for the HTML of the page setting up the frame-set. The preview at the top of the page shows the current frame. Move between different frames by clicking on the preview.

Three templates are used for the contents of the frames:

- **^SD^** - Search definitions
- **^H^** - Hitlist
- **^S^** - Single view

Important: Be very careful when editing the HTML definition of the report. Do not change the source references (src='content.asp?...) or frame names.

22.6. Recovering Deleted Items

All items in Individual Reporting can be deleted. You have four methods as follows:

- Click on the item to select it and the press the **Delete** key on your keyboard.
- Click on the item to select it and go to the **Item > Delete** menu command in the report tree menu.
- Right-click on the object and choose **Delete** from the drop-down menu.
- Open the Properties page for the item, check the **Deleted** box, then save.

Deleted items are not actually removed; they are flagged as "Deleted" and are then not displayed in the tree. Deleted items can be recovered, as follows:

1. Double-click the top node in the tree (the project name).

   The Settings page opens .

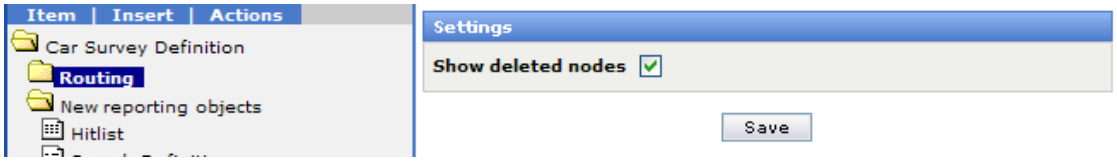


Figure 677 Recovering deleted items

2. Check the **Show Deleted Nodes** box.
3. Click **Save**.

   If you reopen the tree, previously-deleted nodes will now appear in gray.
4. Double-click a deleted node.

   The Deleted checkbox in the Properties page for that item will be checked off.
5. Uncheck this property and click **Save** to restore it.

Note: If you delete an item, which is gray (where the "deleted" property is set) it will be permanently deleted.

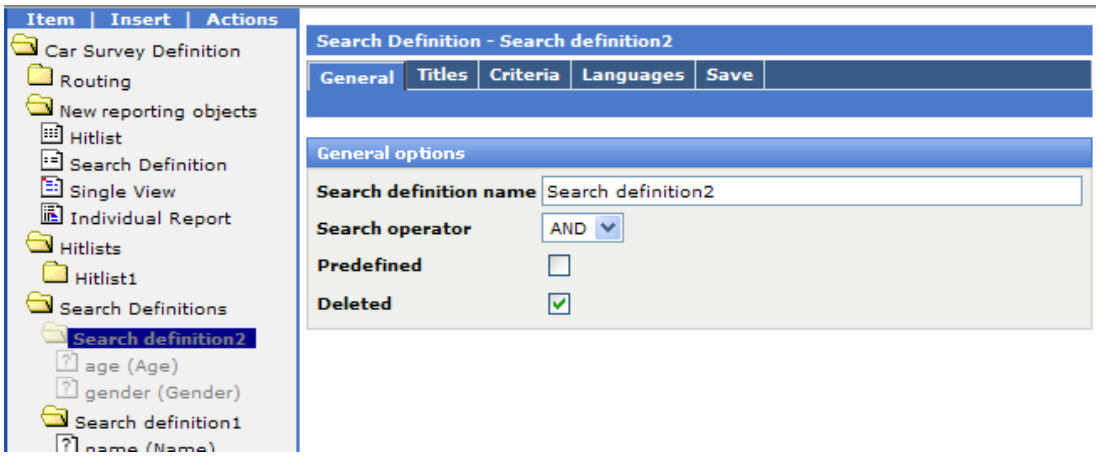


Figure 678 Uncheck the Deleted box and click Save to restore a deleted item

22.7. Publishing the Individual Report

When you are finished with the modifications on your report, you will need to publish it. Choose between publishing the report with the test or production database. The databases are created when the survey is compiled. As the compilation procedures may have been performed at different times for the production and test databases, there may have been changes made to the questionnaire in between, so the test and production databases may contain different fields.

When the report is published, the Published Online Report page opens. To view the finished report, click on the **Report ID** link in the list.

22.8. The Individual Reporting User Interface

When the report has been published, it will be listed in the Published Online Report page. To view the finished report:

1. Go to the **Reporting > Published Reports** menu command.

The Published Online Reports page opens with the published reports listed.

2. Click on the **Report ID** link in the list.

   The report's Properties page opens in the lower part of the window as shown in the example below.

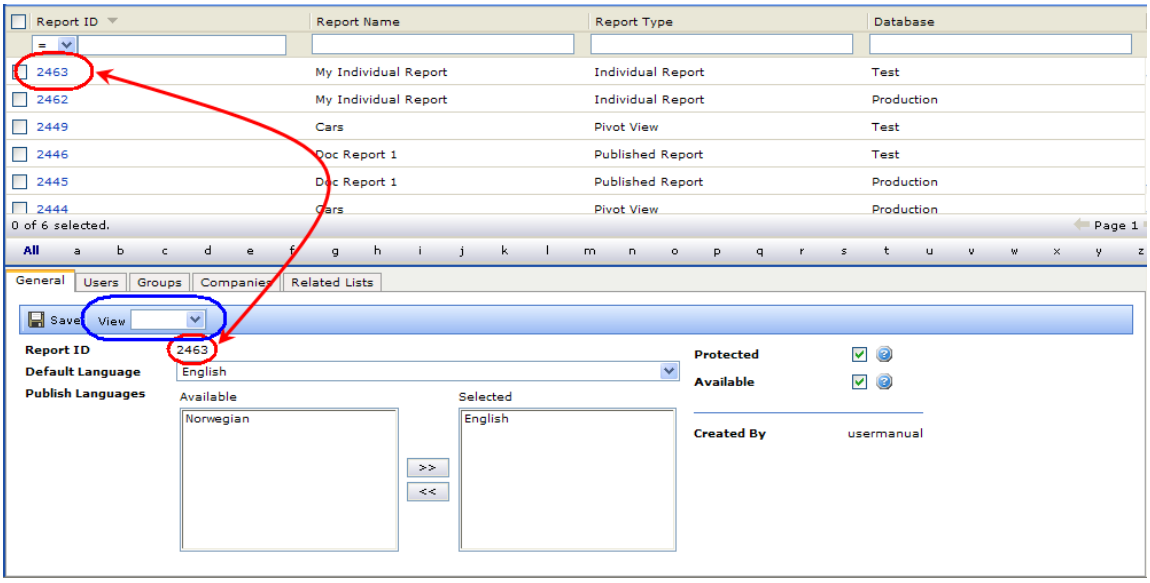


Figure 679 Example of the Published Online Reports window with a report selected

In the figure above, the Report ID for report 2463 has been clicked and its details are shown in the lower area.

3. Click on the down-arrow beside the View field (ringed in blue above), and select the view you wish to see.

   The user interface for that report opens in a new window, as shown in the example below.

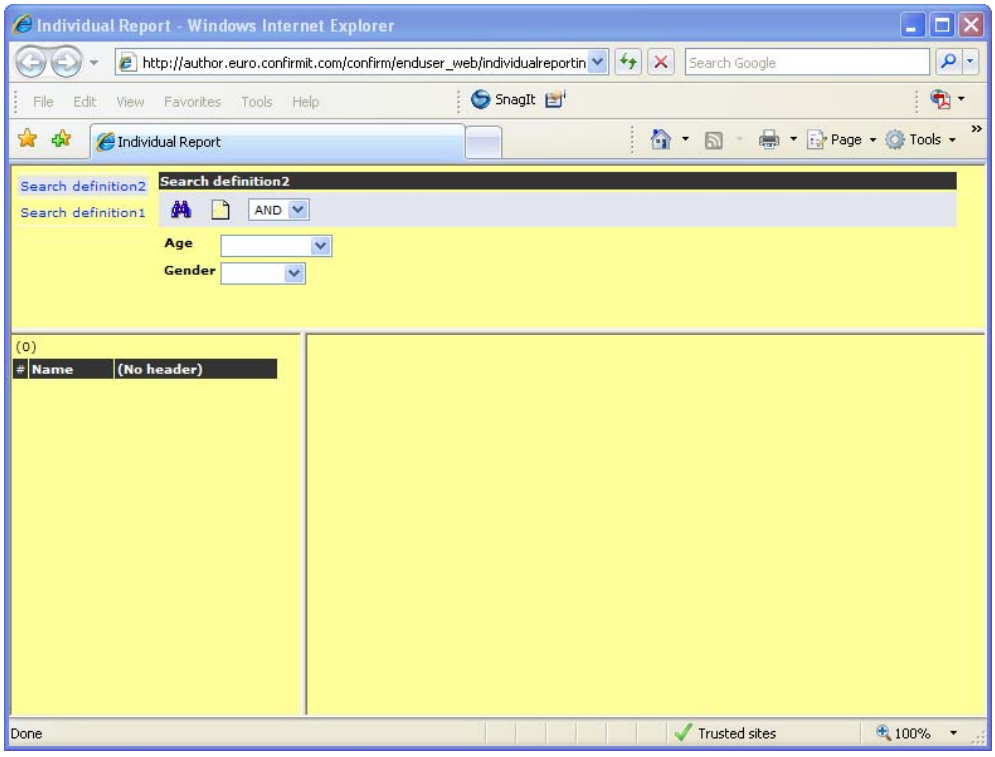


Figure 680 Example of the Individual Report User Interface

The interface you see will depend on the settings you made in the wizard (go to The Individual Report Wizard on page 488 for more information) and how you have set up the search definitions (go to Search Definitions on page 474 for more information), hitlists (go to Hitlists on page 478 for more information) and single views (go to Single Views on page 482 for more information).

4. Select the desired search definition and the search criteria as required and click the **Search** button  .

   The list of respondents answering to the search criteria is presented in the Hitlist frame (in this case in the lower left frame).

5. Click on a respondent link to see the respondent's data in the Single View frame (in this case the lower right frame).

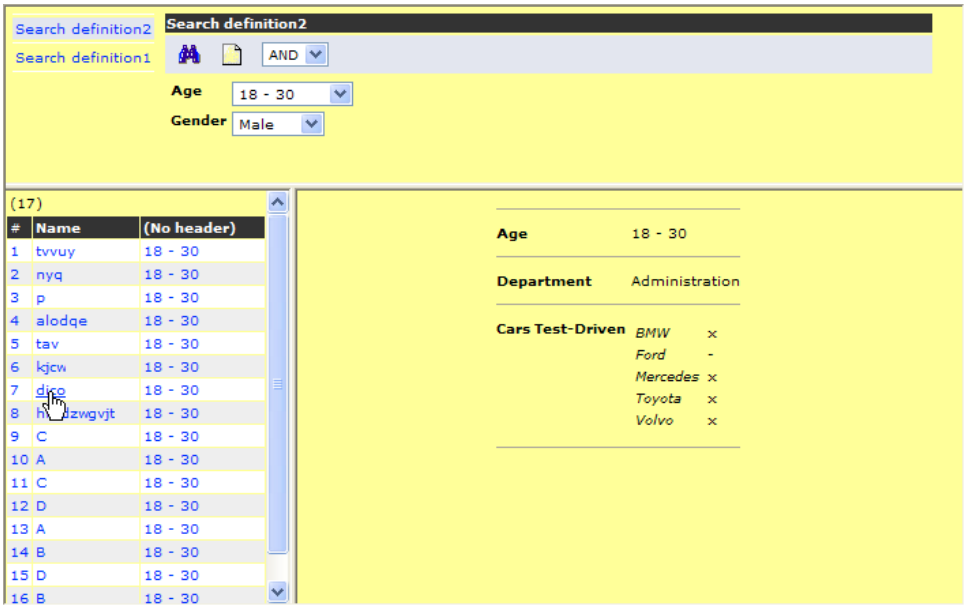


Figure 681 Example of a User interface

Click the **Clear** button  to clear the search fields.

You can choose between doing searches with AND between the fields (meaning that every search criterion must be satisfied) or OR (meaning that just one of them must be satisfied).

22.8.1. Open Text Search

For open text questions, the user will be presented with a text box to specify his search, as shown in the figure below.



Figure 682 Example of an Open Text search field

The * character can be used as wildcard. For example, a search for "Smith" will return all respondents with a name that starts with "Smith", whereas a search for "*Smith" will return all respondents where Smith is a part of their name.

22.8.2. Multiple Choice Search

If multiple choice is selected for a search criteria, the user will be presented with a box in which he/she can use standard Windows techniques to select the required items.



Figure 683 Example of a Multiple Choice search field

22.8.3. Single Choice Search

If multiple choice is not selected for a search criteria, it will default to single choice. In this case, the user will be presented with a drop-down from which he/she can pick one of the items.



Figure 684 Example of a Single Choice search field

22.8.4. Search on items in a multi question

For the items of a multi question, the user will be presented with a drop-down where he/she can choose between True (answered) or False (not answered).

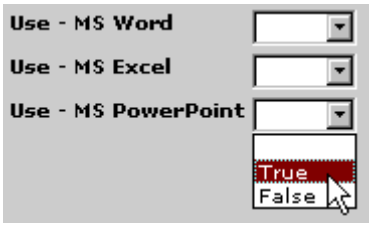


Figure 685 Example of search on items in a multi question

22.8.5. Predefined Search

When selecting a predefined search, the result is directly displayed in the hitlist.

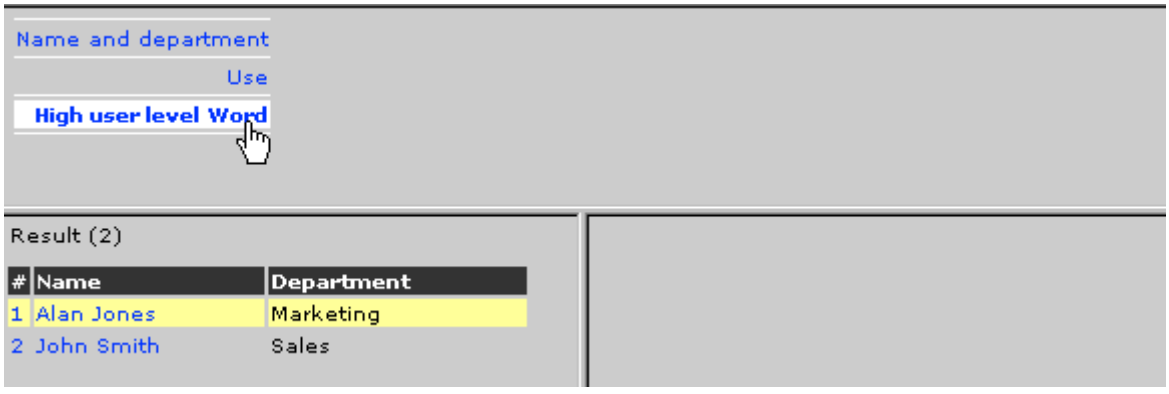


Figure 686 Example of a Predefined search

22.8.6. Sorting the Hitlist

You can sort the hitlist if desired. To do so:

1. In the hitlist, click the column header of the column you wish to sort.
2. Click again to reverse the order.

   A white arrow-head appears to indicate the direction of sorting.



Figure 687 Sorting the hitlist

22.9. Making Modifications to an Individual Report after it has been Published

You can modify any element of an individual report after it has been published. To implement your changes, simply republish the report. The changes are then instantly made.

23. Administration of End Users

This chapter explains the End Users Administrationinterface 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 on page 503 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:

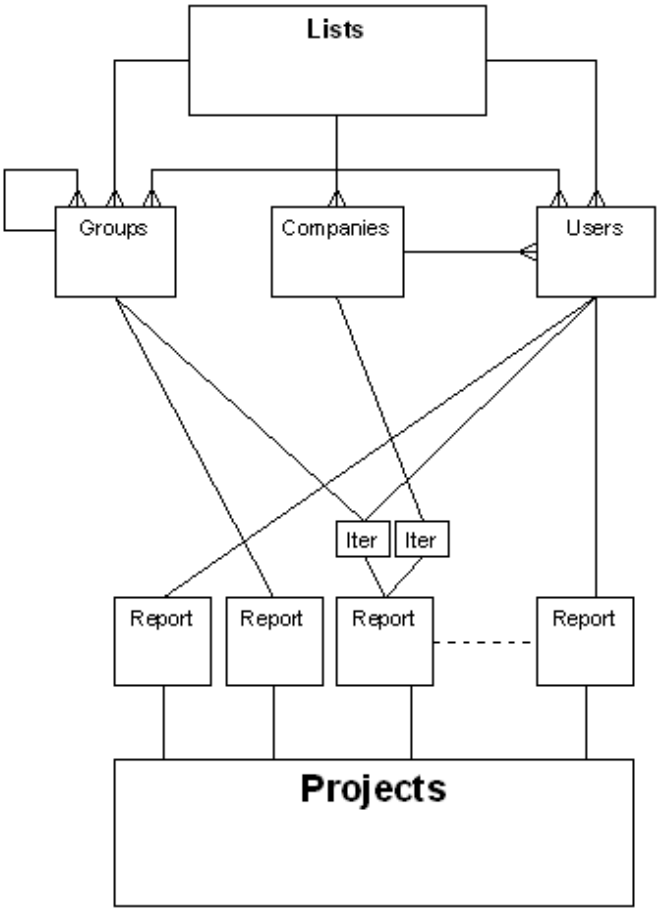


Figure 688 The End User administration interface layout

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 (go to How to Create a New End User List on page 501 for more information).
2. In the list, create a company (go to How to Add a New Company to a List on page 507 for more information).
3. Register end users in the company (go to How to Add a New User to a List on page 508 for more information).
4. Collect end users into groups as required (go to How to Add a User to a Group on page 517 for more information).
5. Register reports and report iterations (go to Aggregated Reporting on page 407 for more information).
6. Link reports and report iterations to companies, groups and end users (go to The Users > Details Page > Published Online Reports Tab on page 510 for more information).

23.2. The End Users Menu

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.

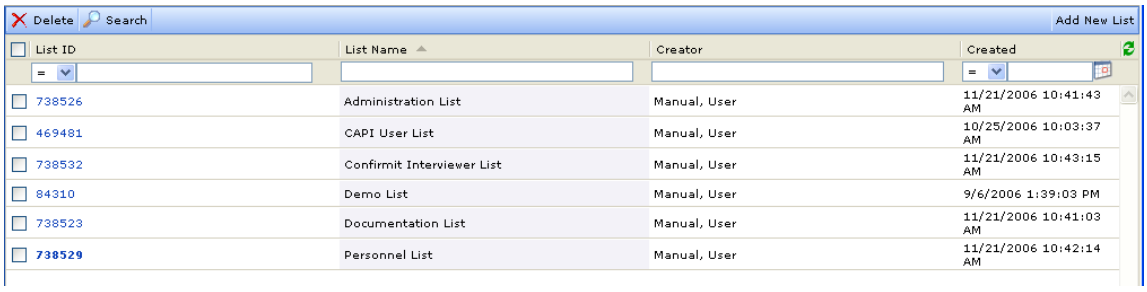


Figure 689 Example of the End User Lists window

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.

2. To open a list, click on the identification number of the list you wish to work with (the blue link in the left column).

   The Update Current End User List window for that list opens, at the **General** tab.

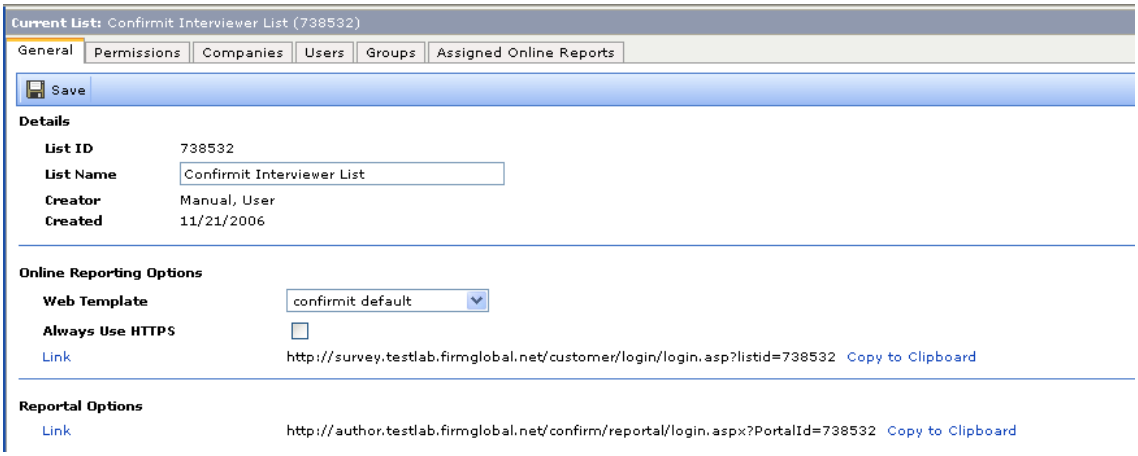


Figure 690 Example of the Update Current End User List window – General tab

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:

1. Go to the **End Users > Lists** menu command.
2. Click the **Add New List** button located towards the right end of the End User Lists toolbar.

   The New End User List dialog opens.

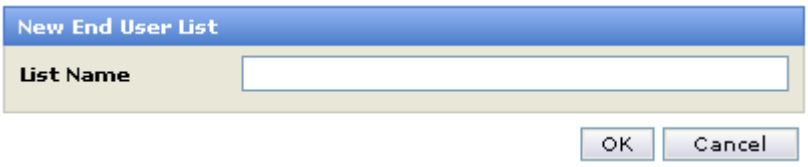


Figure 691 The New End User List dialog

3. Type the name of the new list into the List Name field.
4. Click **OK**.

   The End User List is created and the list editing window opens at the **General** tab. The list editing window enables you to set the user permissions for the selected End user List, create companies, users and groups, and assign reports to those.

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 (go to How to Add a New Company to a List on page 507 for more information).

You can now add Users to a list (go to How to Add a New User to a List on page 508 for more information).

23.5. The General Tab

The figure below shows an example of the End User List General tab.

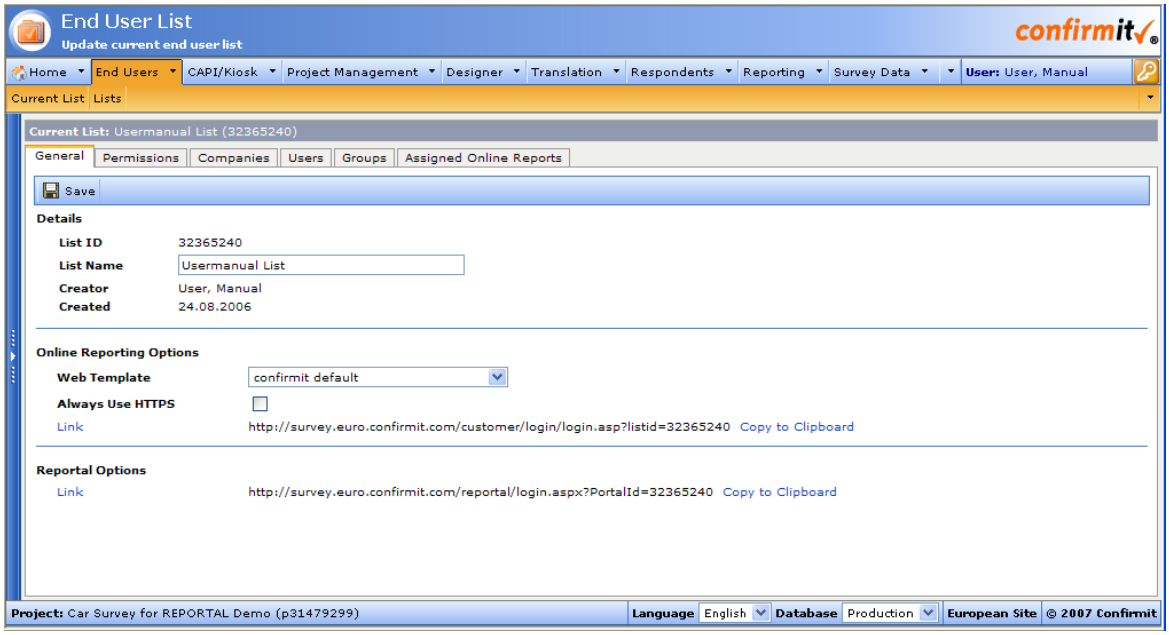


Figure 692 Example of the End User List window General tab

This window provides the following information:

- **List Name –** the name of the currently selected list. Here you can edit the name of the list.
- **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.
- **Web Template –** the web template defines the color scheme for the end-user-visible windows and dialogs, such as the Login dialog, Report Overview, User Settings and Change Password (for example see section (go to How to Access a Published Online Report on page 503 for more information)). Click the down-arrow to open a list of the available templates, and select the template you wish to use.
- **Always Use HTTPS –** check this box if you want this list to use the secure hypertext transport protocol.
- **Link –** click to go to the login dialog to view published online reports that you have access to. You can also copy the link to the clipboard – see below.
- **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.

23.5.1. How to Access a Published Online Report

End users will access published online reports via the link provided on the General tab. If the end user has direct access to the End User Administration functionality then they can click the **Link** on the tab (see the previous section), otherwise you as the administrator must ensure that the full link path is sent to the end user. The End User Administration functionality includes the facility to send emails to the end users (go to How to Send Emails to End Users on page 514 for more information). You can also copy the link into a “normal” email using the **Copy to Clipboard** button on the tab.

To access a published online report:

1. Click the **Link** in the Online Reporting Options area of the General tab, or open an Internet browser and copy the link path into the Address field as appropriate.

   The Login dialog opens.



Figure 693 The login dialog

2. Type your user name and password into the fields and click **OK**.

   The Report Overview window opens. This window lists all the reports you have access to, either individually or as a member of a company or group.

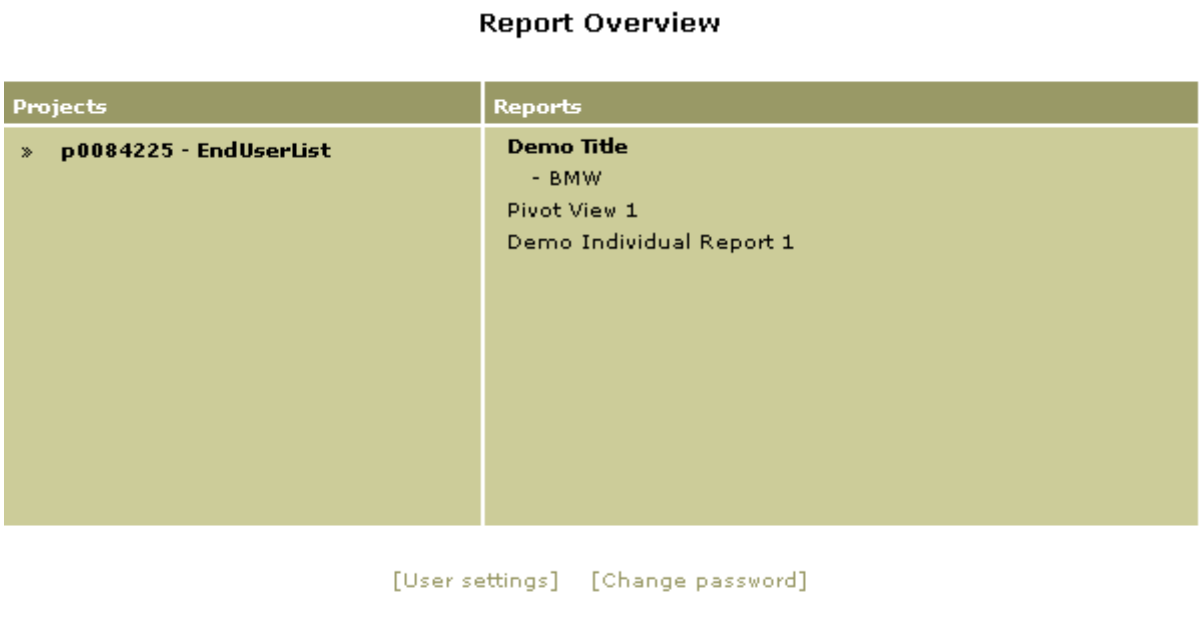


Figure 694 Example of the Report Overview window

3. To view a report, click the appropriate link in the Reports column.

23.5.2. How an End User can Change Their Settings - The User Settings Link

The **User Settings** link opens a dialog with two options:



Figure 695 The User Settings dialog

- **Select Language –** on initial registration in a list, each user is assigned a default language (go to How to Add a New User to a List on page 508 for more information). If a report to which the user has access is created in that language, then the user will receive it automatically. The user and/or the administrator may change the default language if required.
- **Open in new window –** check this box to cause reports to open in a new window. This then enables you, when you have finished with one report, to close the window, return to the Report Overview list and view another report. If you leave the box unchecked, then a report will open in the same window as the Report Overview list, thereby overwriting the list.

23.5.3. How an End User can Change Their Password - The Change Password Link

The end user may change his/her password at any time.

1. In the Report Overview list, click the link to open the Change Password dialog.



Figure 696 The Change Password dialog

2. Type your user name and existing password into the appropriate fields to identify yourself.
3. Type your new password twice into the lower fields (typing it twice ensures you have typed it correctly the first time).
4. Click **OK** to register the new password.

See also the HowtoChangeanEndUser section.

23.6. The Permissions Tab

Note: If you do not have Administrator permission in this tab, you will not be able to access it.

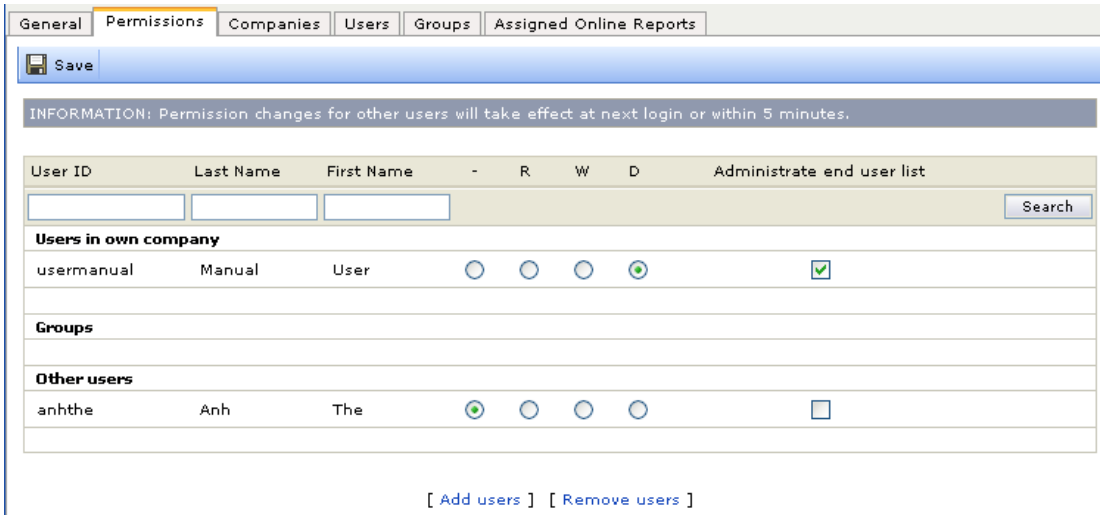


Figure 697 The End User List editing window – Permissions tab

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.

The Permissions tab list has a search function to enable you to more easily find the required administrator(s) in the event that the list is extensive.

The administrative options you can give are as follows:

- **- –** the default setting. The person has no administrative rights over the list. The list will not show in their list of end user lists.
- **R –**click to give the person **Read** access to the list you have created.
- **W –**click to give the person **Write** access to the list you have created.
- **D –**click to give the person **Delete** access to the list you have created.
- **Administrate End User –** check this box to give the person full administrative 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 personnel 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 in the lists you are creating.

To add a person 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 Key property. Copy this key to your clipboard.

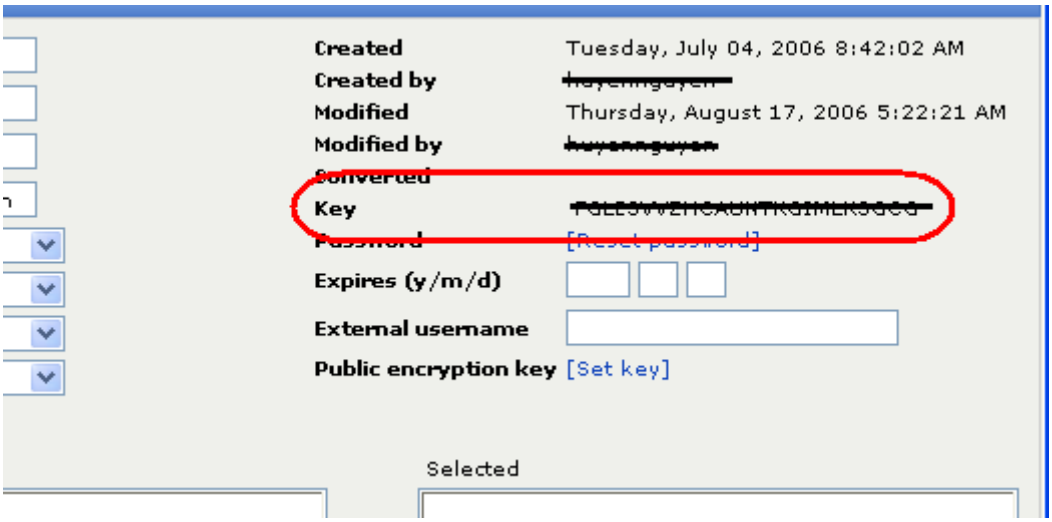


Figure 698 The Key property in the user's Details page

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 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 Users list.

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.

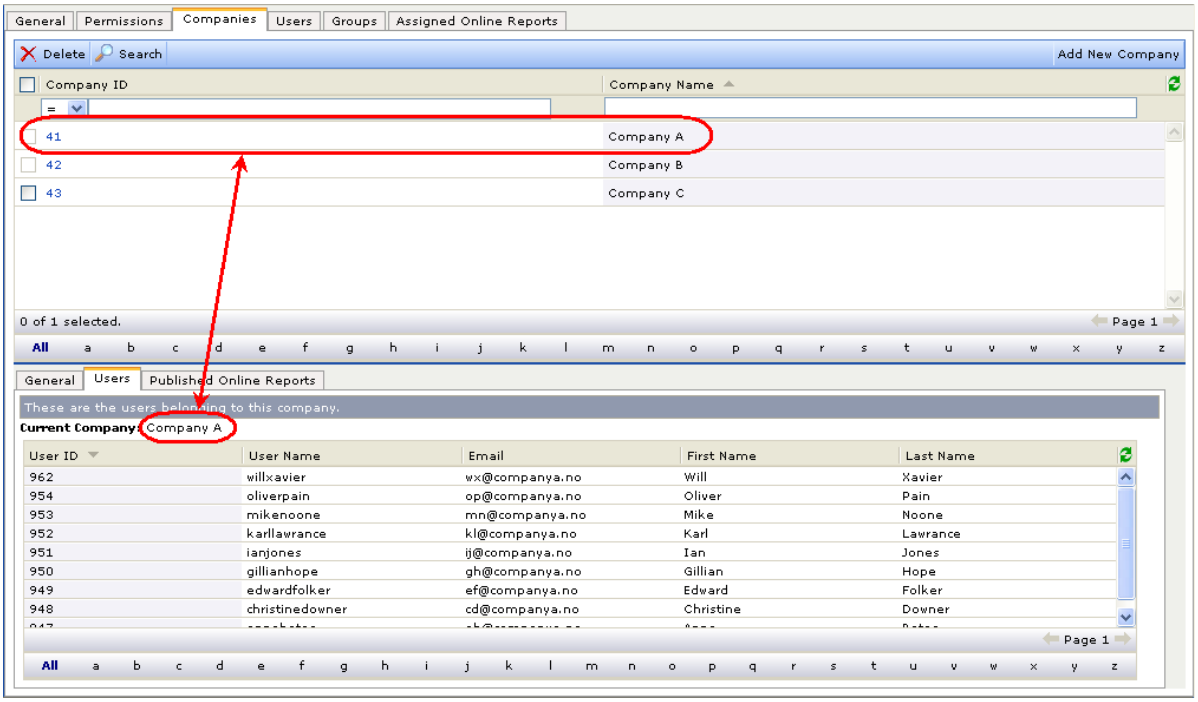


Figure 699 Example of the Companies tab

In this example, Company A has been selected in the upper area (as shown by the Current Company, and the Users list for this company is displayed in the lower area.

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.

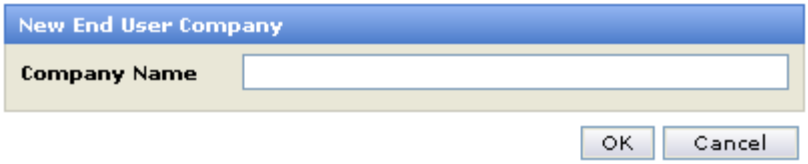


Figure 700 The New End User Company dialog

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.

23.8. 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 (go to The Companies Tab on page 506 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.

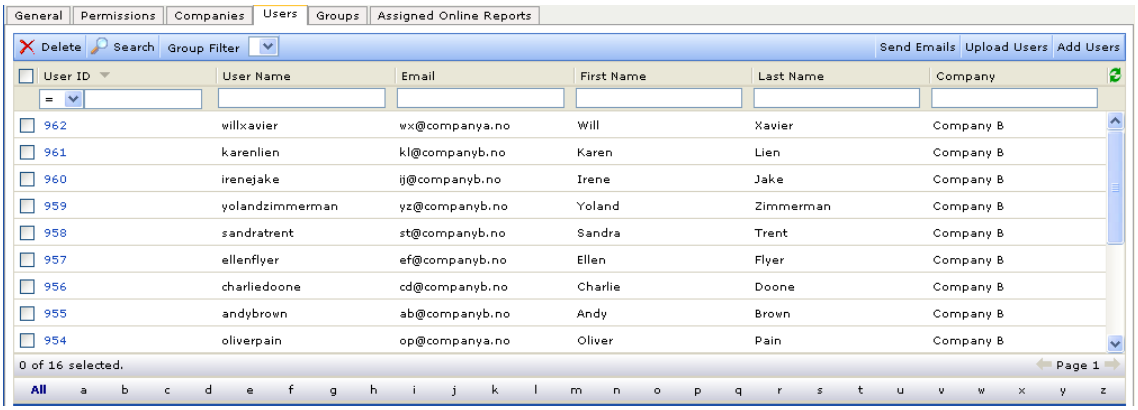


Figure 701 Example of the Users tab

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.

1. Click the **Add Users** button located towards the right end of the window toolbar.

   The Add Users dialog opens in the lower part of the window.

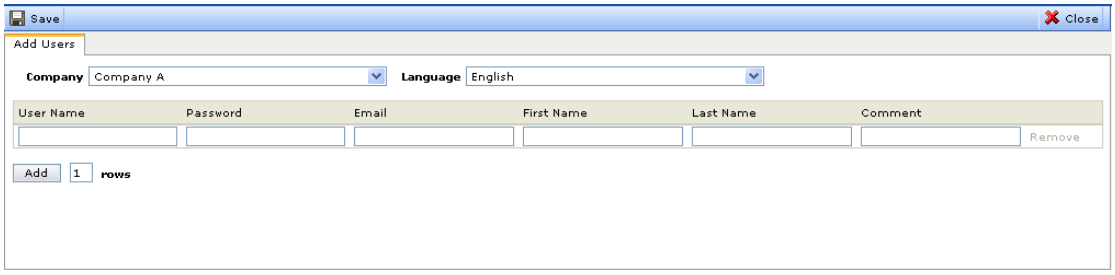


Figure 702 The Add Users dialog

2. In the Company field, select the company to which the user is to be attached.
3. In the Language field, select the language to be registered as the default language for the user.

   Each user is assigned a default language. If a report to which the user is given access is created in that language, then the user will receive that version automatically. The user and/or the administrator may change the default language if required.
4. If you have a number of users to add, you can complete all their details in one page. Type the number of rows you wish to add to the list into the Rows field in the lower left corner of the window, then click **Add** to add the specified number of rows to the list.
5. Type the users User Name into the field. This is the name the user will type into the User Name field when logging in to view a report.
6. Type in a password for the user to use when he/she logs in to access the published online reports.

   The user can change their password when they have logged in (go to How an End User can Change Their Password - The Change Password Link on page 504 for more information) and you as the administrator can change a user's password if necessary (go to How to Change an End User's Password on page 509 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 (go to How to Edit the User Information on page 509 for more information).

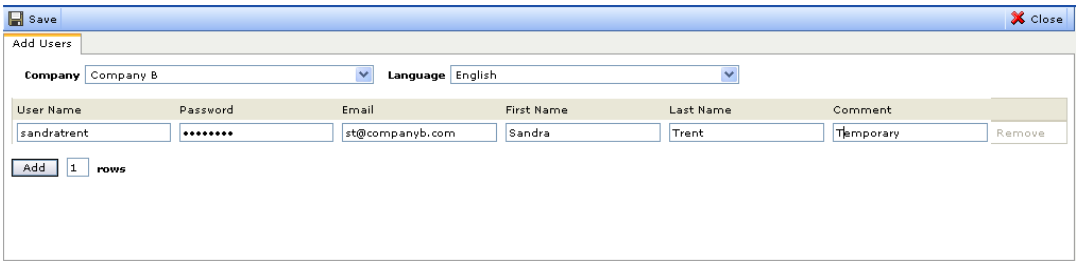


Figure 703 Example of a completed Add User dialog

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.

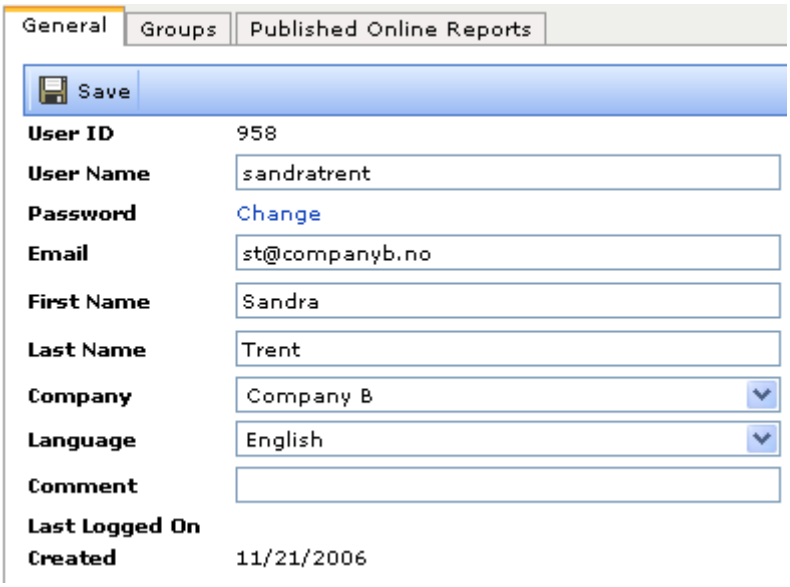


Figure 704 Example of a details page for a user

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 (go to How to Attach a Group to a User on page 510 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 on page 510 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 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.
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. 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.

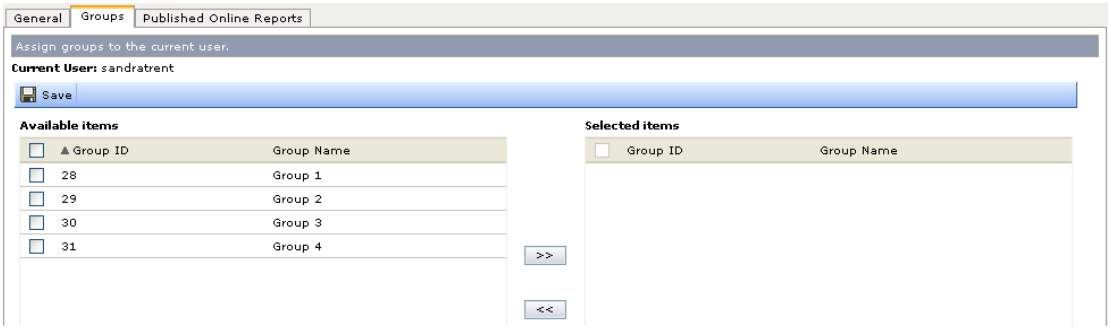


Figure 705 Example of a user's Details > Groups tab

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. The Users > Details Page > Published Online Reports Tab

Use this tab to link reports to a user. If any groups are linked to the user, then the users in the groups will also have access to the report.

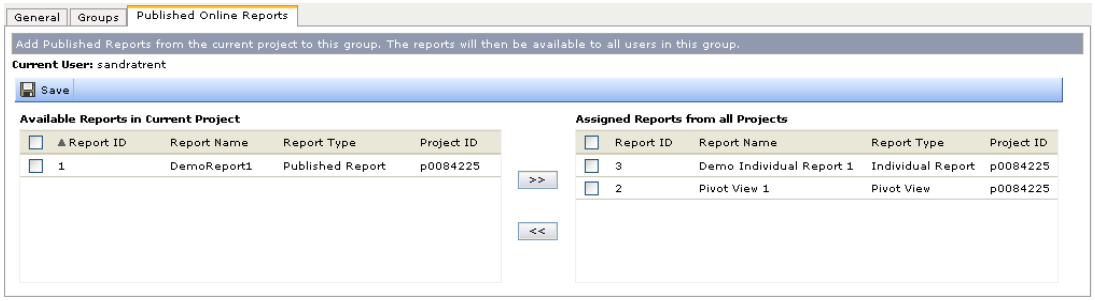


Figure 706 Example of a user's Published Online Reports tab

23.8.5.1. How to Attach a Published Online Report to 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. On the Details page, go to the **Published Online Reports** tab.

   The page shown in the previous section opens.

1. In the Available Items column, check the box beside the report(s) you wish to link to the user.
2. Click the **>>** button to move the selected group(s) to the Selected Items column.
3. Save the changes.

23.8.5.2. How to Attach a Published Online Report Iteration to a User

If a report has iterations, then when it has been assigned to a user the **Iterations** link becomes active - see the figure below.

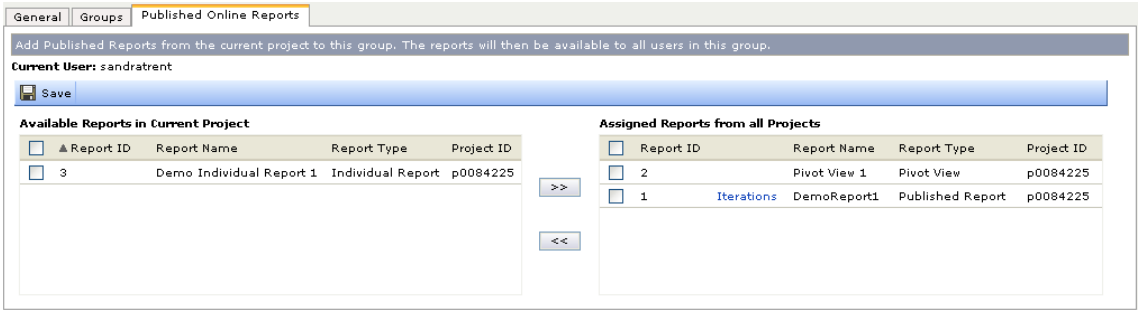


Figure 707 Example of a report with an iterations link

1. To assign a report iteration to a user, click on the **Iterations** link for the report.

   The Iterations window opens. This window lists all the available iterations for the report.

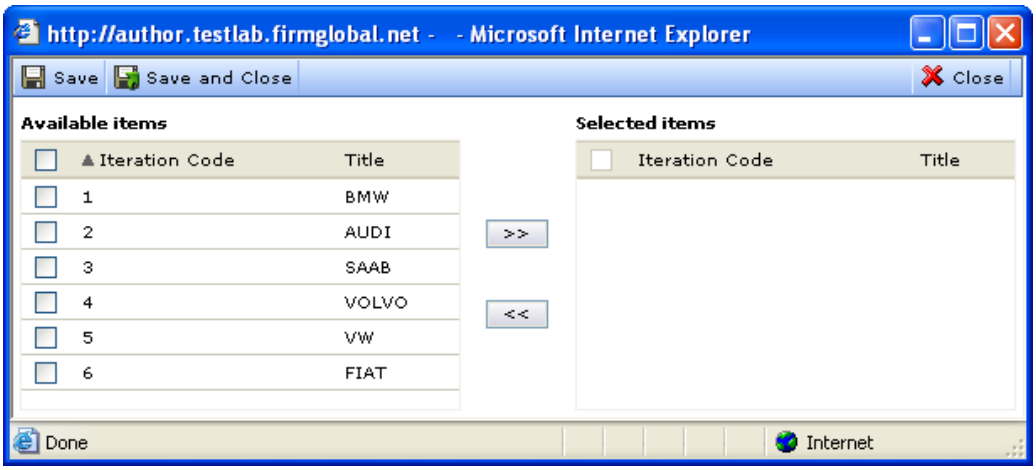


Figure 708 Example of a Report Iterations window

2. In the Available items column, click in the box for the iteration(s) you wish to assign to the user, then click the **>>** button to move the iterations to the Selected Items column.
3. Save the changes.

23.8.5.3. How to Remove a Published Online Report from a User

In the event you wish to remove a user's access to a report or a report iteration, proceed as follows:

1. Go to the **End Users > Lists** menu command and select the list in which the user is registered.
2. Go to the **Users** tab, find the user in question and click on the **User ID** link.
3. In the Details page, go to the **Published Online Reports** tab.
4. In the Assigned Reports… column, click in the checkbox for each report that you wish to remove access for, then click the **<<** button to move the report to the Available Reports… column.
5. Save the changes.

23.8.6. 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 **Upload Users** button located towards the right end of the Users tab toolbar.

   The Upload Properties dialog opens as shown in the figure below.

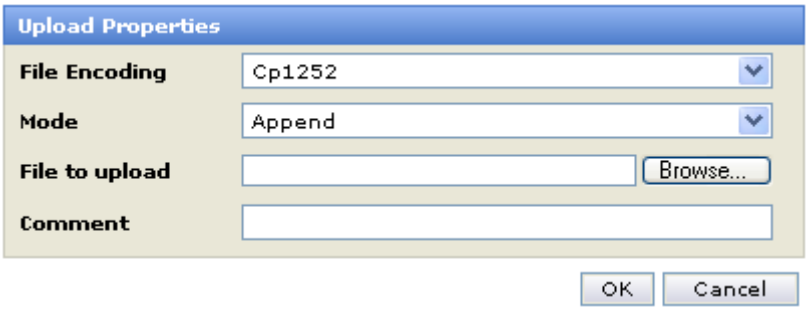


Figure 709 The Upload Properties dialog for end users

The fields in the dialog box are as follows:

- **File Encoding –** select the character set used if the file is written using a code or language other than the default.
- **Mode –** do you wish to add the file to an existing list or overwrite the list?
- **File to update** - browse to and select the file you wish to upload.
- **Comment** - type a comment as required into this field.

2. Click **Browse,** and browse to and select the file you wish to upload.
3. Choose the character set used for the file.
4. Select whether you wish to add the list you are uploading to a pre-existing list (Append), or whether you wish to overwrite the existing list.
5. 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.
6. Click **OK** to commence the upload, or **Cancel** to abort and close the dialog.

   The Load Database dialog opens.

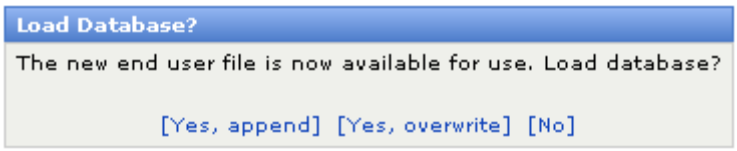


Figure 710 The Load database dialog

Choose either **Yes, append** to add the file to the existing list, **Yes, overwrite** to overwrite the existing list, or **No** to cancel the operation.

23.8.6.1. 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.

23.8.7. 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.

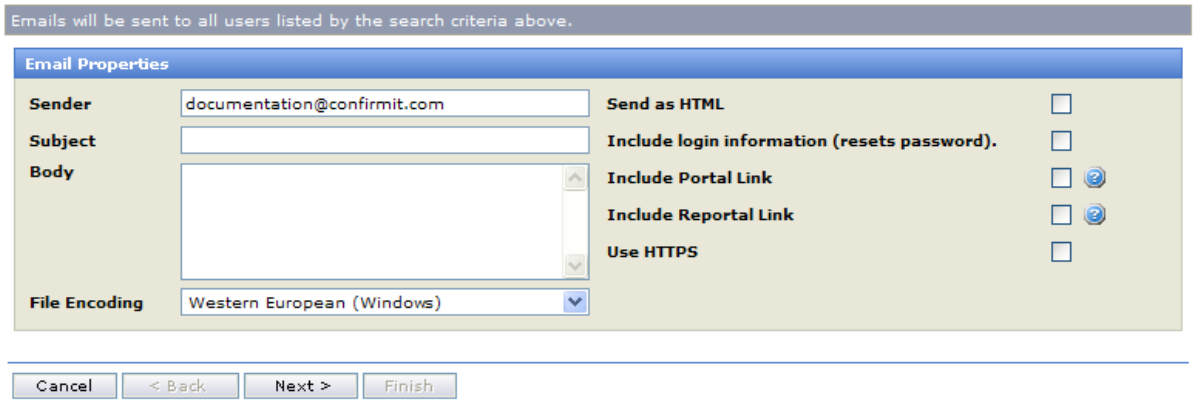


Figure 711 The Email Properties dialog

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 Portal link** – check this box to include the link to the report portal (the Online Reporting Options URL) 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:

   - The Note above the email preview window informing you of how many emails will be sent.
   - The type of email to be sent (Plain Text or HTML) given in the left column.
   - 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.
   - The link information included below the body text.



Figure 712 Example of the Email Preview page

5. Preview the email and check that it is correct.

   You can go back and modify the email if necessary.
6. Click **Next** to proceed to the next page.

The Task Properties dialog opens. Here you set when you want the email to be sent.

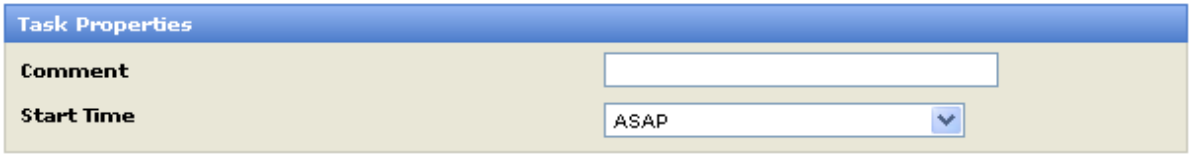


Figure 713 The Task Properties dialog

- **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).

23.8.7.1. 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.

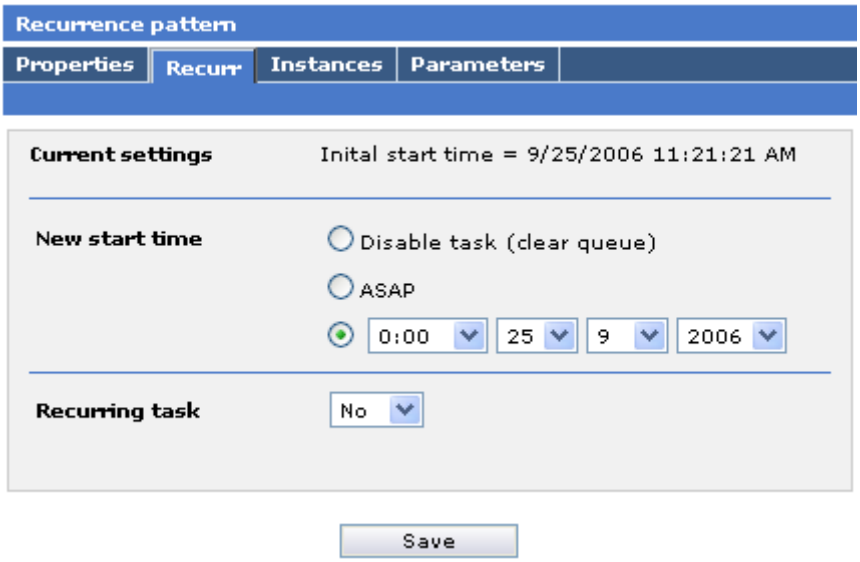


Figure 714 The Recurrence Pattern dialog

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.

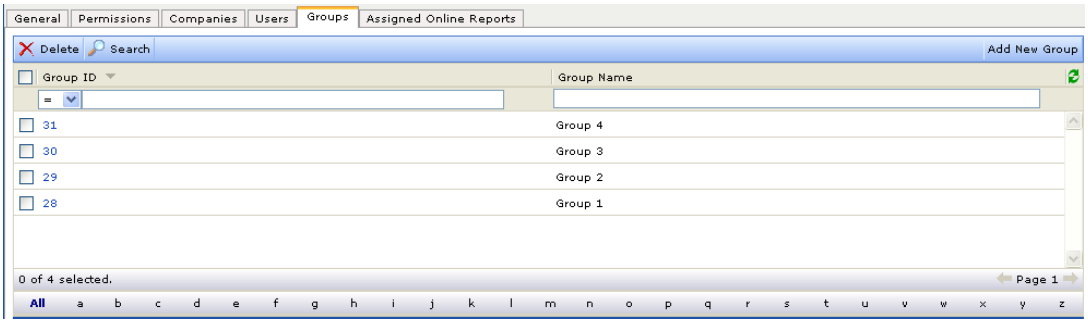


Figure 715 Example of the Groups tab

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.

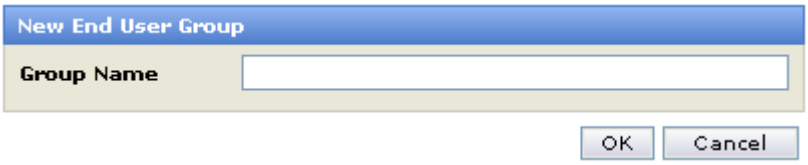


Figure 716 The New End User Group dialog

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 (go to How to Add a New User to a List on page 508 for more information).
- **Groups –** use this tab to add groups to the group (go to How to Add a New Group to the List on page 517 for more information).
- **Published Online Reports –** use this tab to add published online reports to the group (go to Aggregated Reporting on page 407 for more information).

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.

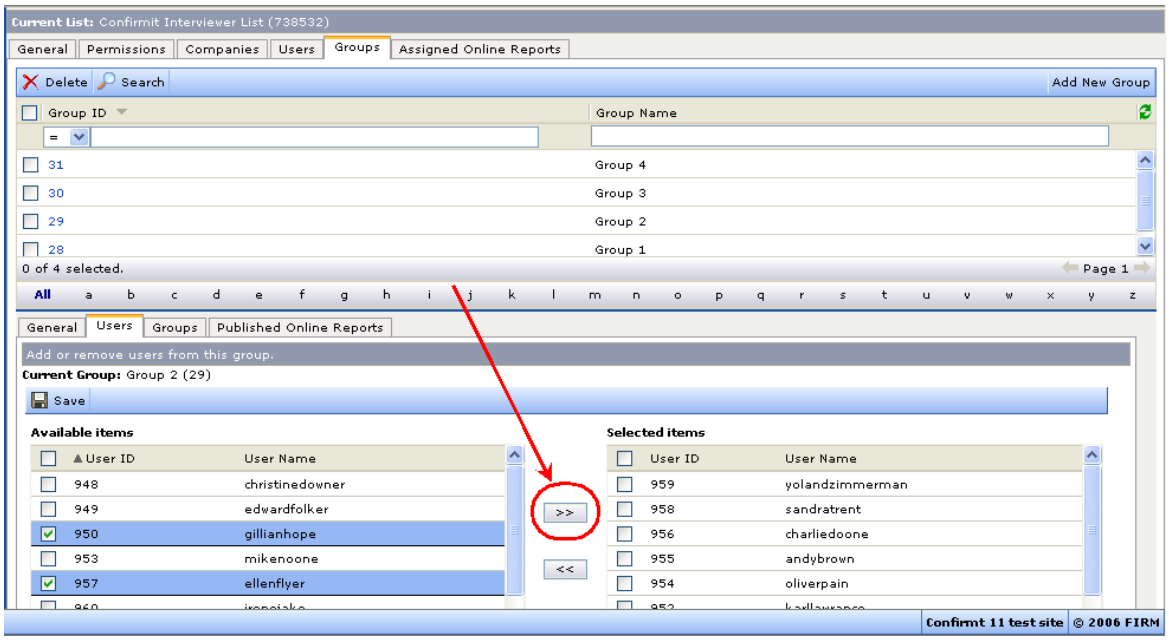


Figure 717 Example of the Groups > Users tab

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.

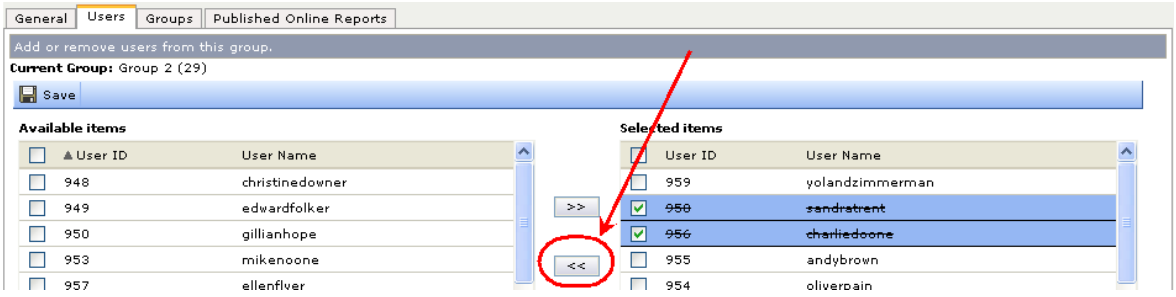


Figure 718 Removing users from a Group

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 Groups 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.

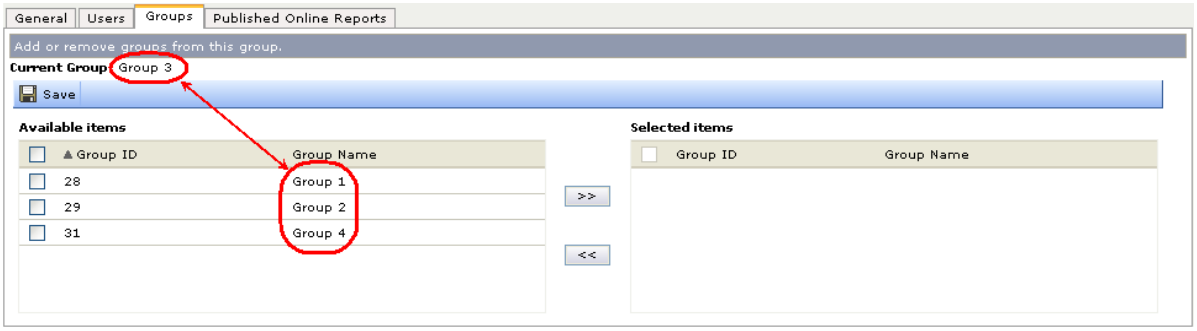


Figure 719 Example of the Groups tab for a group

   In the figure, the company has four groups. Group 3 is selected as the Current Group, and the remaining groups are listed below, available to be linked to Group 3.

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 group's Details page > Users tab, and all the users attached to the group you have just linked in.

23.9.2.4. How to Assign Published Online Reports to a Group

1. Click on a **Group ID** number on the **End User List > Groups** tab to open the details page for that group.

2. On the Details page, go to the **Published Online Reports** tab.

   The page shown in the figure below opens.

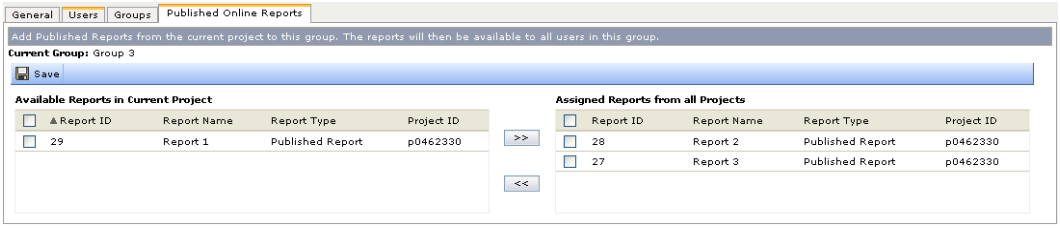


Figure 720 Example of the Groups > Published Online Reports tab

3. In the **Available Reports…** column, check the box beside the report(s) you wish to link to the group.
4. Click the **>>** button to move the selected report(s) to the **Assigned Reports…** column.
5. Save the changes.

   To remove a report from a group, select the report in the **Assigned Reports…** column and click the **<<** button.

23.9.2.5. How to Assign Report Iterations to a Group

If a report has iterations, then when it has been assigned to a group the **Iterations** link becomes active. See the figure below.

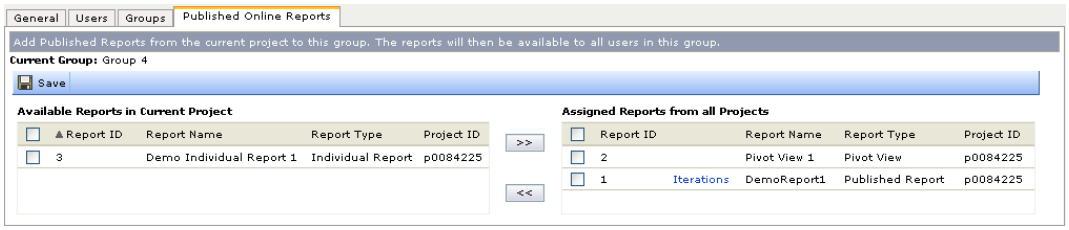


Figure 721 Example of a report with an iterations link

1. To assign a report iteration to a group, click on the **Iterations** link for the report.

   The Iterations window opens. This window lists all the available iterations for the report.

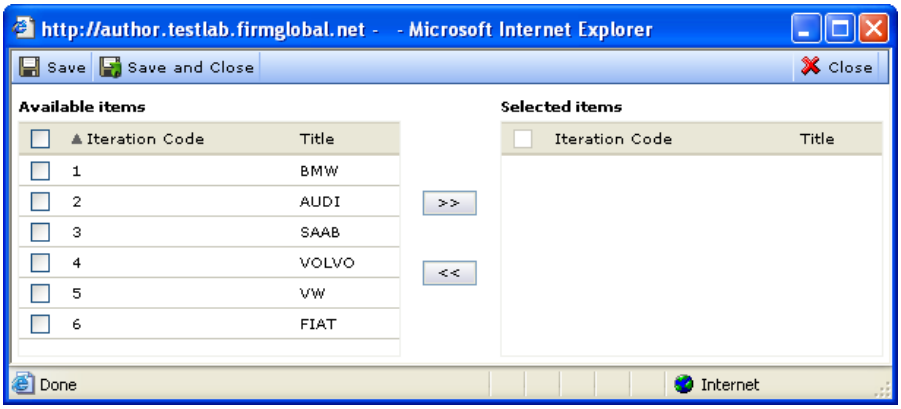


Figure 722 Example of a Report Iterations window

2. In the Available items column, click in the box for the iteration(s) you wish to assign to the group, then click the **>>** button to move the iteration(s) to the Selected Items column.
3. Save the changes.

23.10. The Assigned Online Reports Tab

This tab lists all the reports that are published in the system. This is a read-only window; you cannot make any changes to the system from here. To assign reports to companies, groups and/or users, go via the appropriate tab.

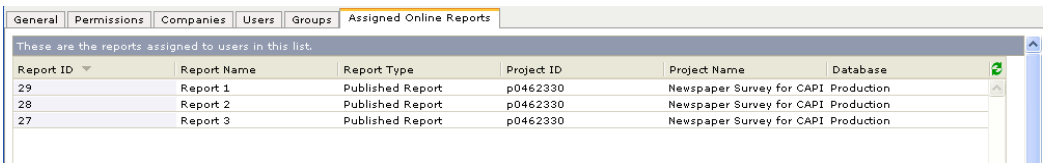


Figure 723 Example of the Assigned Reports tab

24. The Login Interface for End Users

The End User functionality allows a user without user access to Confirmit, to access a set of reports through a private login.

End users log on to a deployment-server rather than the usual authoring-server, where they have no access to other functionality in Confirmit apart from viewing reports, matrix-views or individual-reports. The end user must provide their user-id and password when logging on to this page. This data will be validated against information in the database before the user is allowed to view any reports. The end user can only see reports that have been specifically assigned to him/her.

For further information on the end user login and functionality, refer to How to Access a Published Online Report.

25. Survey Data

Under Survey Data is located the functionality for deleting, editing, exporting and importing survey data, and coding of open text responses (go to Online Coding Tool on page 374 for more information).

Note: The options available for the import and export functionality depend on the type of database that has been selected for the project - Legacy or Optimized (go to The Optimized Database Format on page 24 for more information).

25.1. Clear Data

The **Clear Data** menu command allows you to delete the survey data in the production database, and the respondent list if so desired. This means for example that if you have tested a project in production mode with 10 fictitious respondents, before you go live you can remove the test responses and the test respondents.

1. Go to the **Survey Data > Clear Data** menu command.

   The Clearing of Response Data dialog appears.

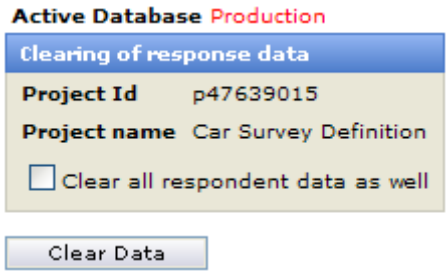


Figure 724 Example of the Clear Response Data dialog

2. Check the **Clear all response data** box if required.
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.

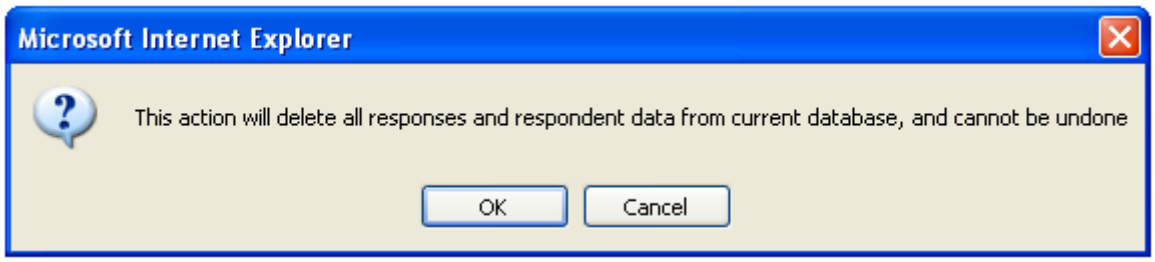


Figure 725 The Confirm deletion warning

4. Click **OK** to continue and delete the data, **Cancel** to abort the operation.

25.2. 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.

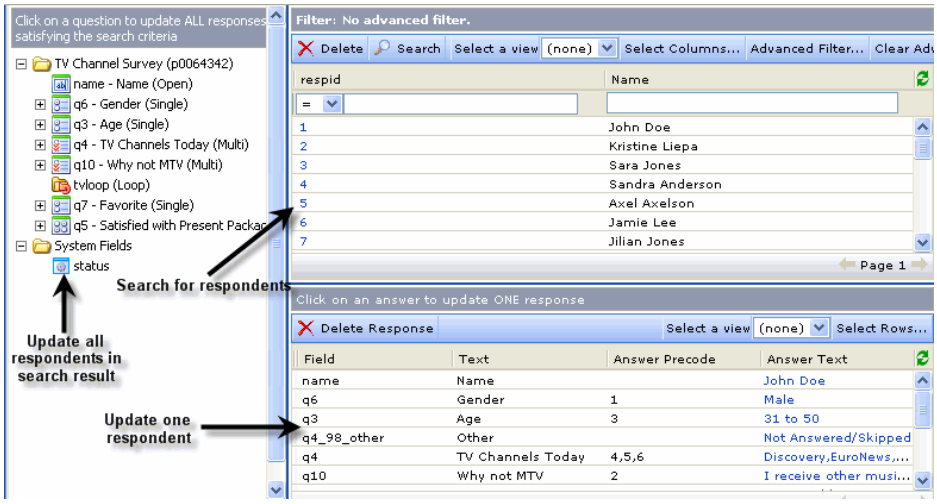


Figure 726 Example of the Edit Survey Data window

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 (go to The Optimized Database Format on page 24 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.

25.2.1. 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.

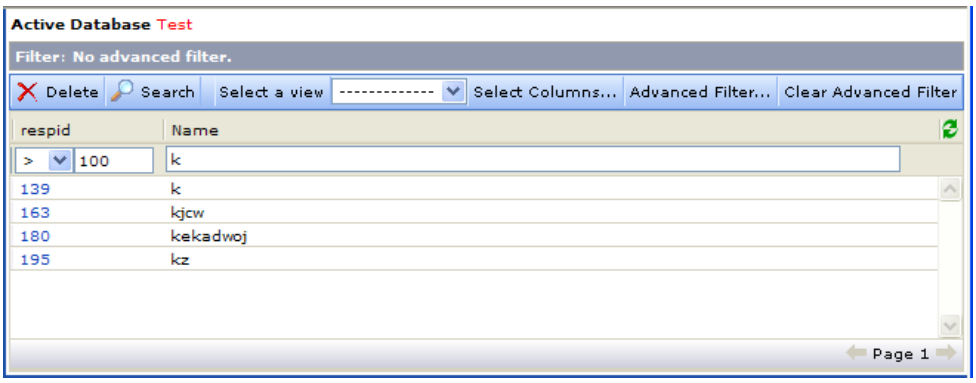


Figure 727 The Search frame

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 precodes of the answers.

There are two main methods of searching in the search frame:

- Standard search (go to Standard Search on page 524 for more information)
- Advanced search (go to Advanced Search on page 524 for more information)

25.2.1.1. 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.

25.2.1.2. Advanced Search

The Advanced Search functionality enables you to set up more advanced expressions involving any variables from the survey(go to The Advanced Filter Designer on page 400 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 (go to The Advanced Filter Designer on page 400 for more information)

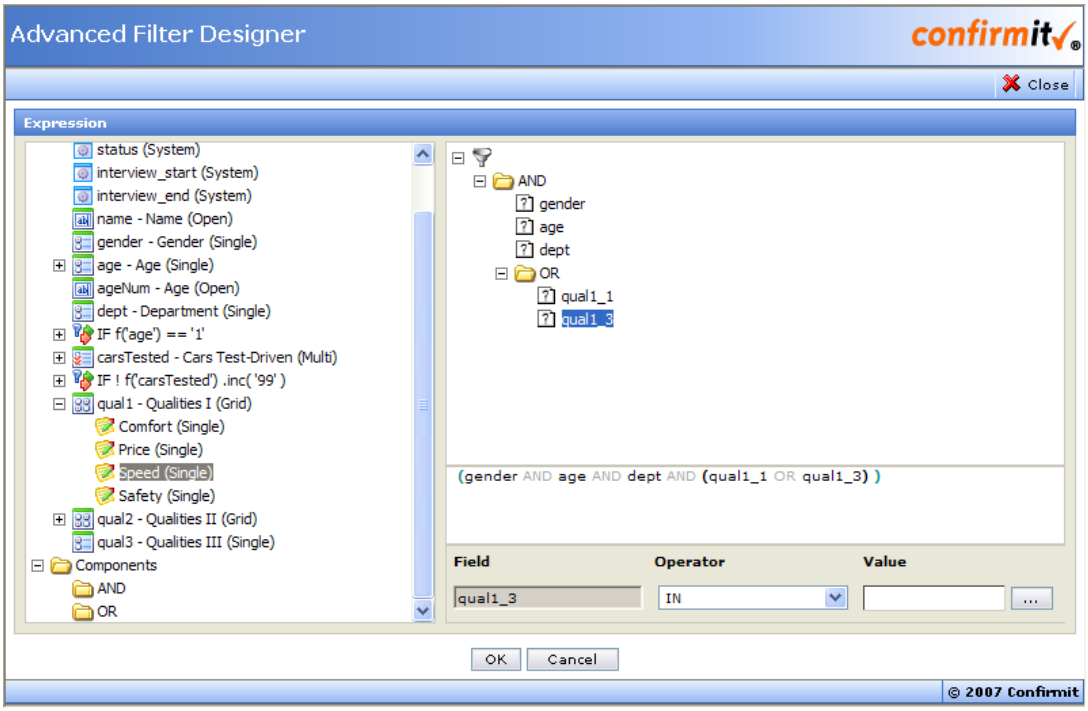


Figure 728 Example of the Advanced Filter Designer

- To remove the filter, click **Clear Advanced Filter**.

25.2.2. How to Add and Remove Columns

To add or remove columns in the search view:

1. Click the **Select Columns…** button.

   The Select Columns window opens as shown below. The question types available as columns in the search view are open text and single questions, and the system variables status, interview_start and interview_end.

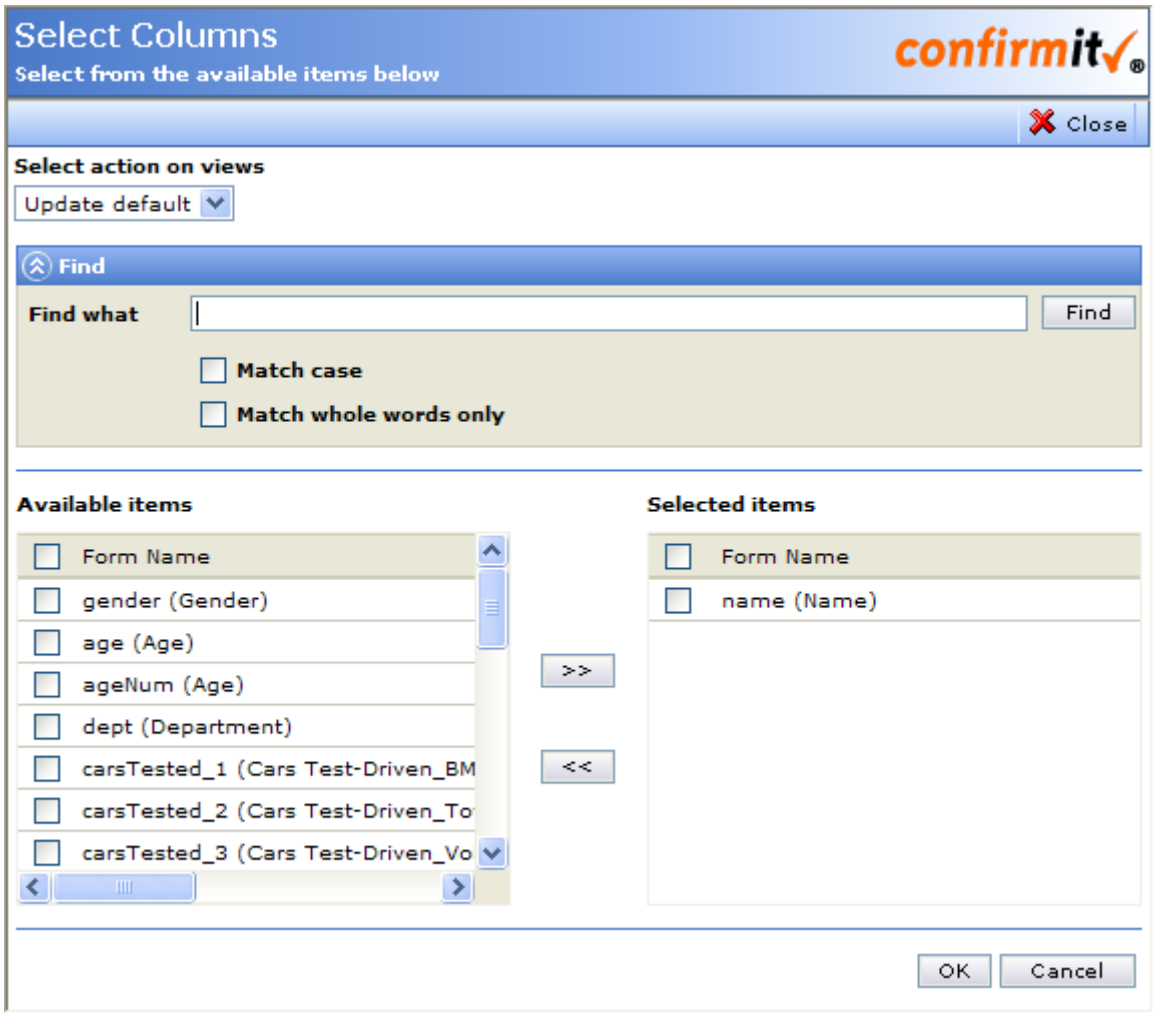


Figure 729 Selecting the columns

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 (go to Views on page 525 for more information).

25.2.3. 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**.

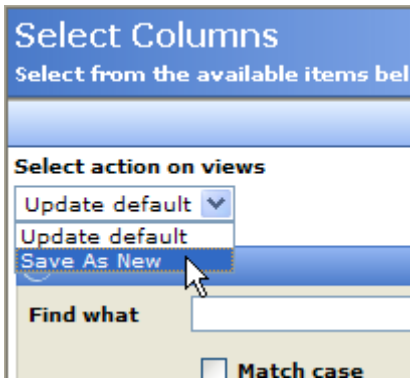


Figure 730 Selecting Save as New

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.

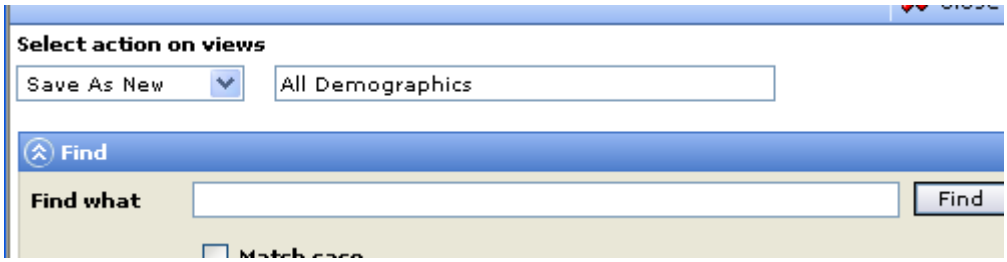


Figure 731 Naming the View

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.

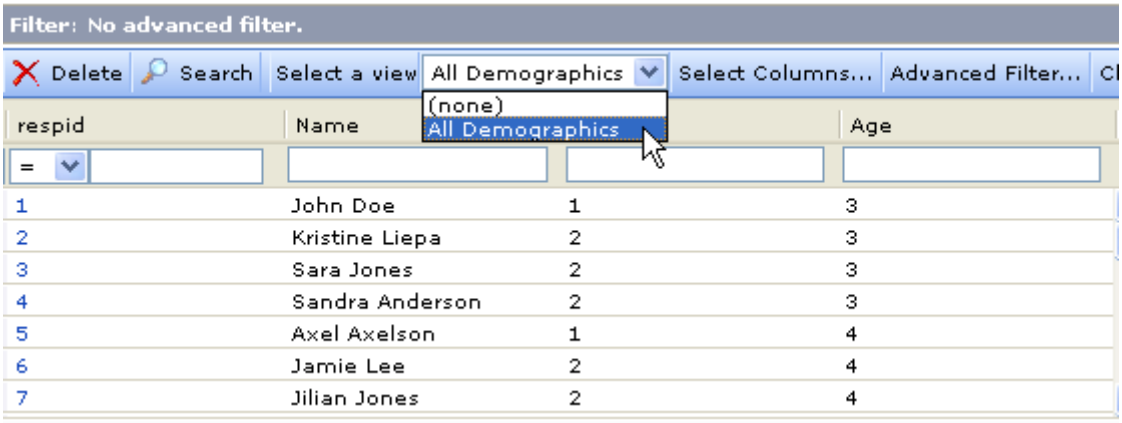


Figure 732 Selecting a View from the drop-down list

25.2.4. 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".

25.2.5. How to Update Answers for All Respondents in a Search Result

You can update the answers for a specific question for all the respondents visible in the list.

1. Perform a search such that only those respondents for whom you wish to update the data are displayed in the list.
2. In the left frame of the Edit window (the questionnaire tree), click on the question text of the question you wish to change the answers for.

   The Update Responses window opens.

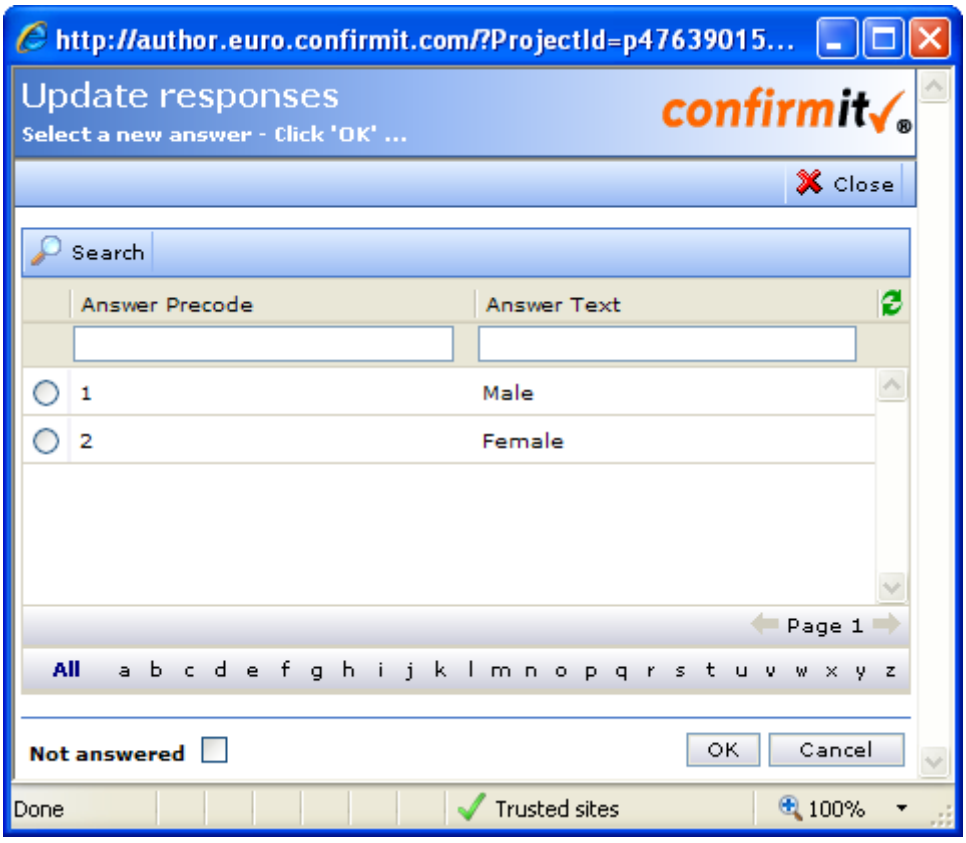


Figure 733 Example of the Update Responses window for a Single question

Note: The functionality available in the window will depend on the type of question you have selected.

For single questions, a list of the precodes and answer texts (in current language) is displayed. You can either select one of the items or set the question to "Not answered "(empty/null).

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.

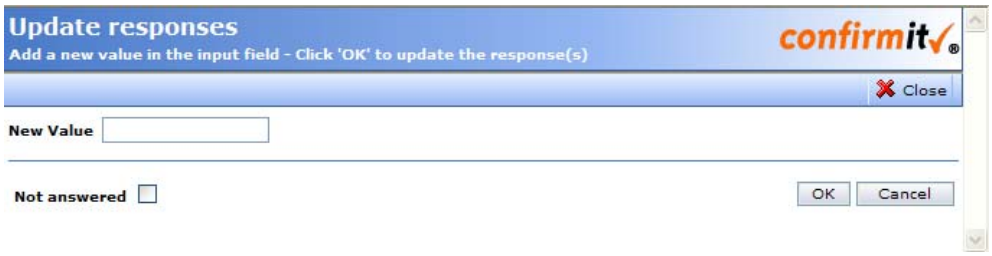


Figure 734 Example of the Update Responses window for an Open text question

For ordinary multi questions, a list of the precodes 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).

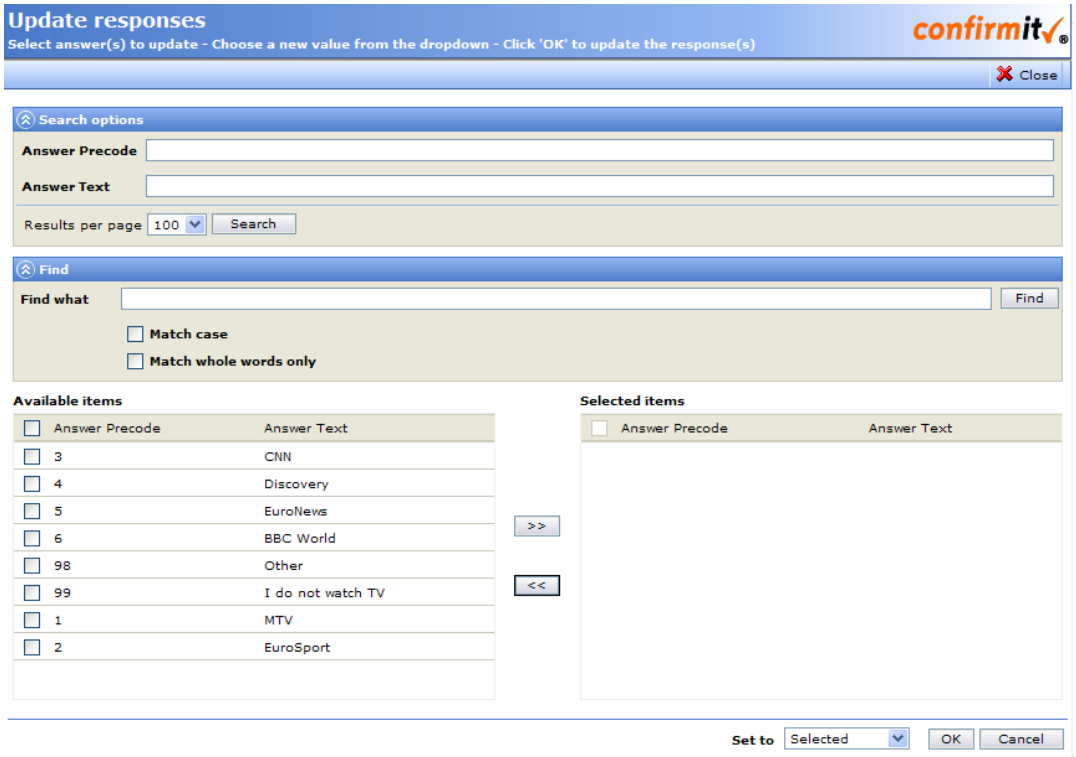


Figure 735 Example of the Update Responses window for an Ordinary multi question

For a multi question with the opentext, 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".

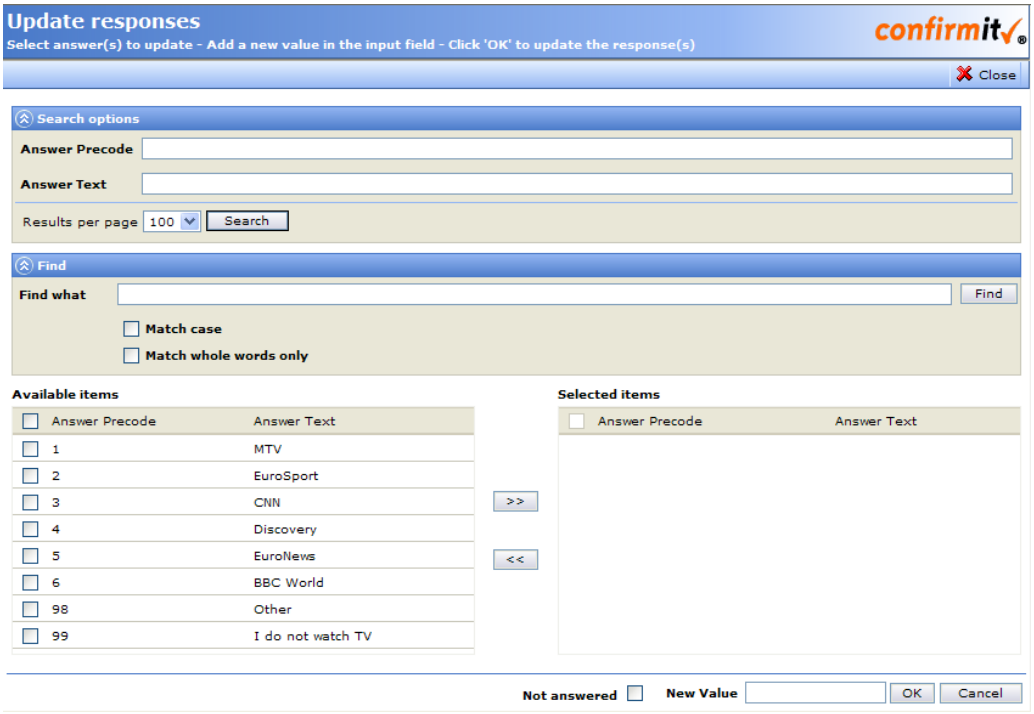


Figure 736 Example of the Update Responses window for a Multi question with opentext, numeric or ranking property

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.

25.2.6. 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, ordinary multis and grids, both the precode 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 precode field will be empty.

Ordinary multis will be displayed in one row, and answer precode/text will list the items that have been selected. Multis with open text or numeric property will be split so that you get one row for each item in the answer list. Grid questions are also split with one row for each item in the answer list.

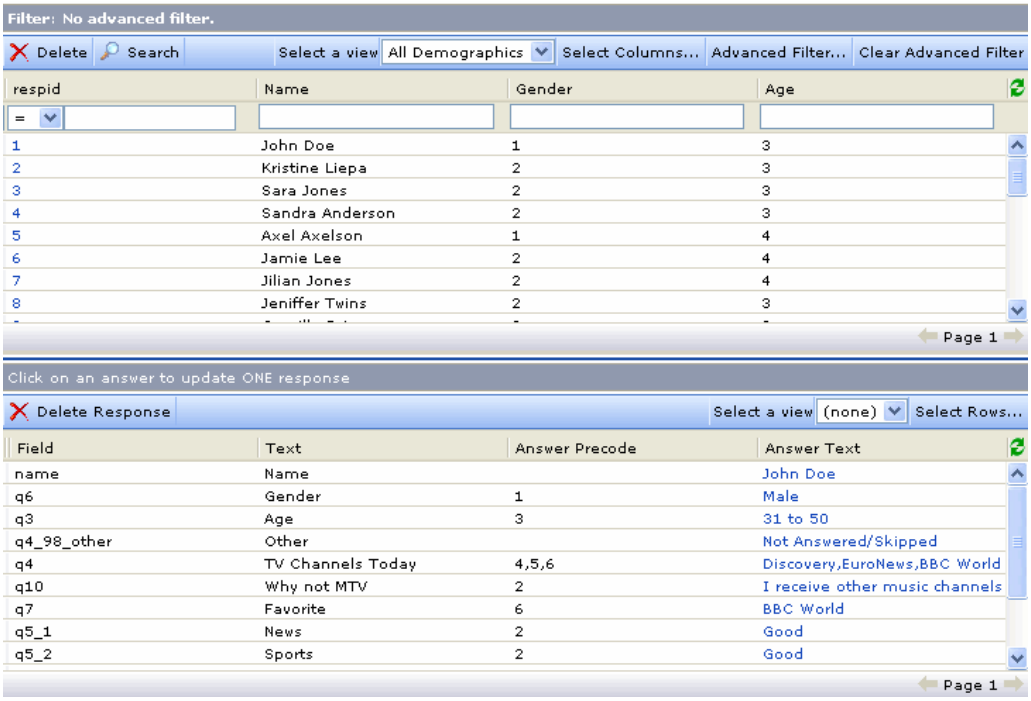


Figure 737 Example of the Data editor for a specific respondent

- 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 (go to Views on page 525 for more information).

For open text questions, open text questions with the numeric property 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.

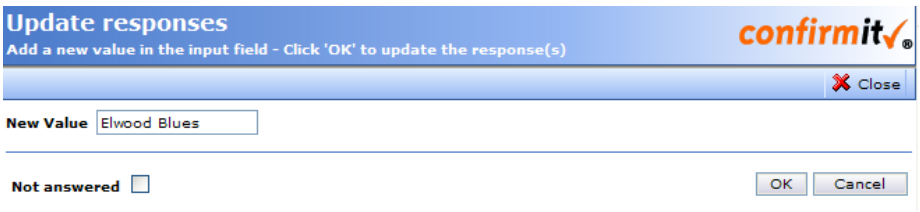


Figure 738 Example of the Update Responses window for an Open text question

For single questions and elements of grid questions, you get a window with the answerlist (precodes 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.

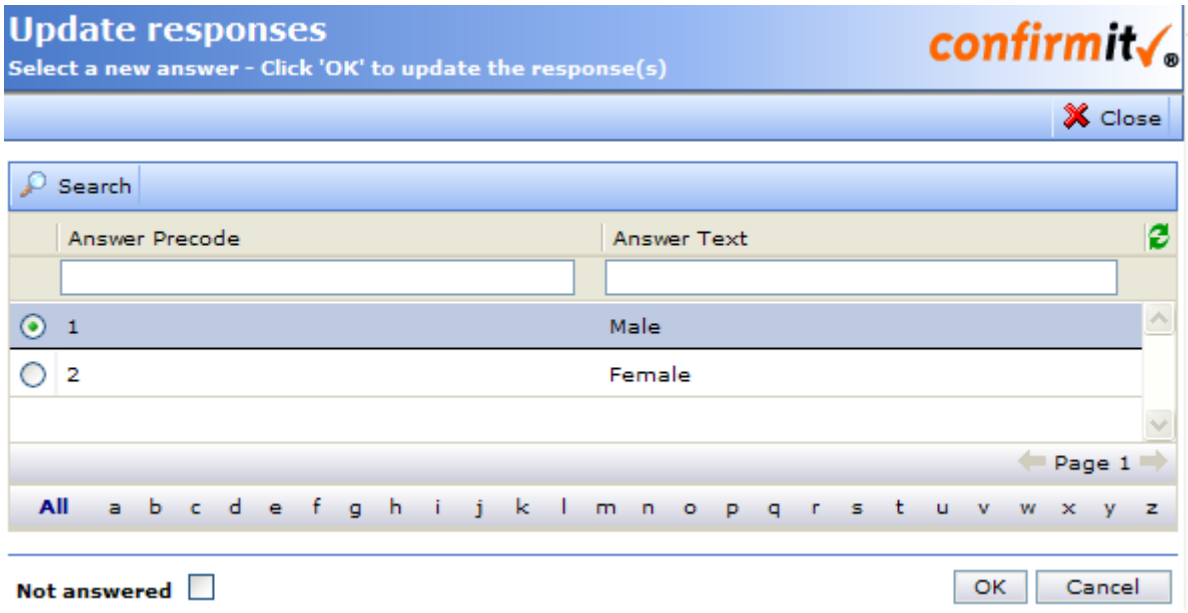


Figure 739 Example of the Update Responses window for a Single question

For ordinary mutli 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).

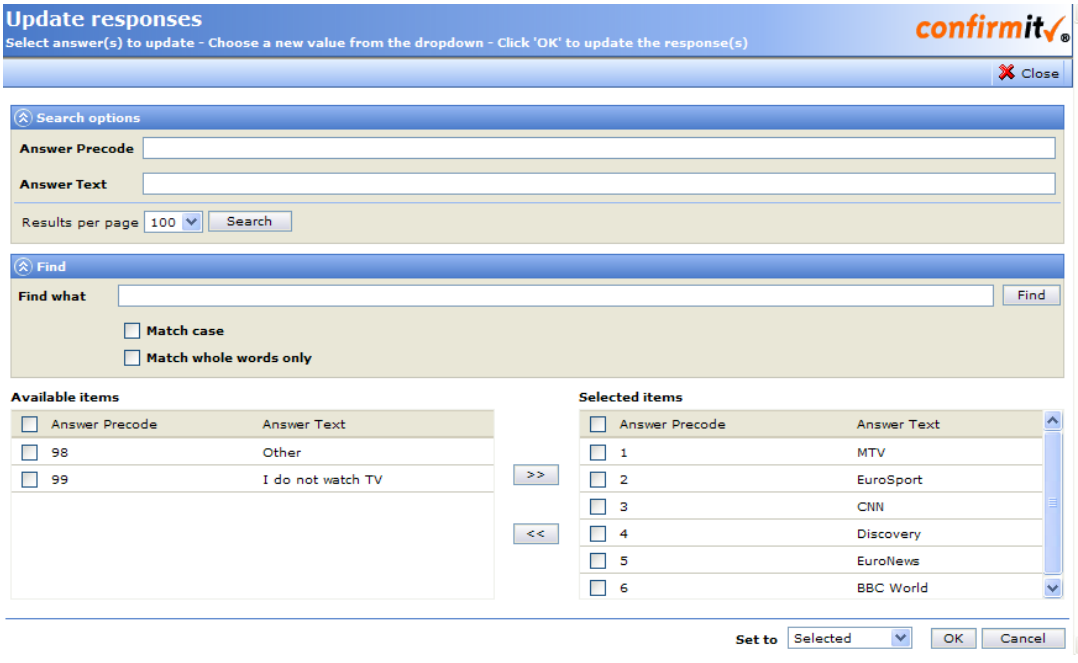


Figure 740 Example of the Update Responses window for an Ordinary multi question

For multi questions with the numeric, ranking or opentext property, when you click any of the elements of the multi, 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.

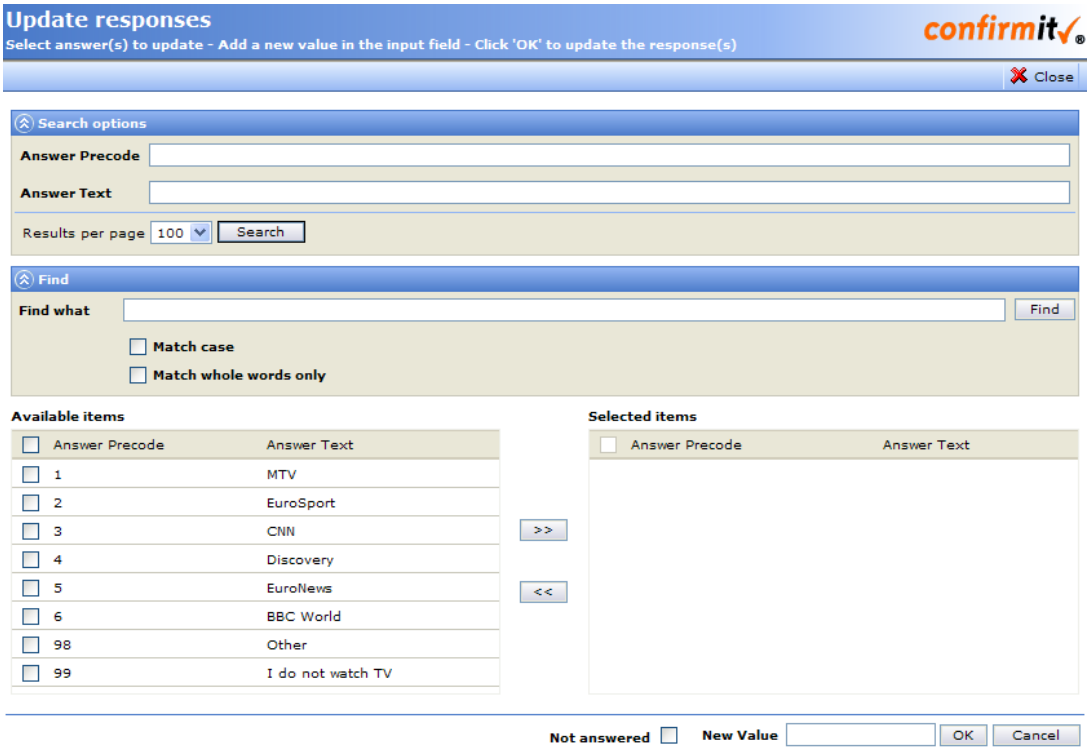


Figure 741 Example of the Update Responses window for a Multi question with the numeric, ranking or opentext property

25.3. 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 and ASCII files. Data can be imported from ASCII tab-delimited files.

Note: The procedures for transferring data depend on the database format used by the project - Legacy or Optimized.

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 "Excel file – labels" which exports answer texts instead of precodes (go to Export Format on page 548 for more information).

Single	One column with a tag identical to question id, and with answer precodes as contents
Open	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_precode of the answer alternative. Contents are: For a normal multi question either 0 (not selected) or 1 (selected); for Open Text Multi questions the contents will be the entered text; for Ordered and Numeric Multi questions the contents will be the number answered.
Grid	A column for each sub question (answers). Tag is equal to: question id_precode of the answer alternative. Contents are the precodes 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_precode_other. Contents will be the answer text.

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.

25.3.1. Template Editor

Note: This functionality is not available for projects using the Optimized database format. The functionality is however included in and superceded by that available within Data Processing (go to The Data Processing Module on page 578 for more information).

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 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.

To open the template editor, go to the **Survey Data > Template Editor** menu command.

The Template Editor page opens as shown below.

Note that the list below is currently empty as no templates have yet been created for this project.

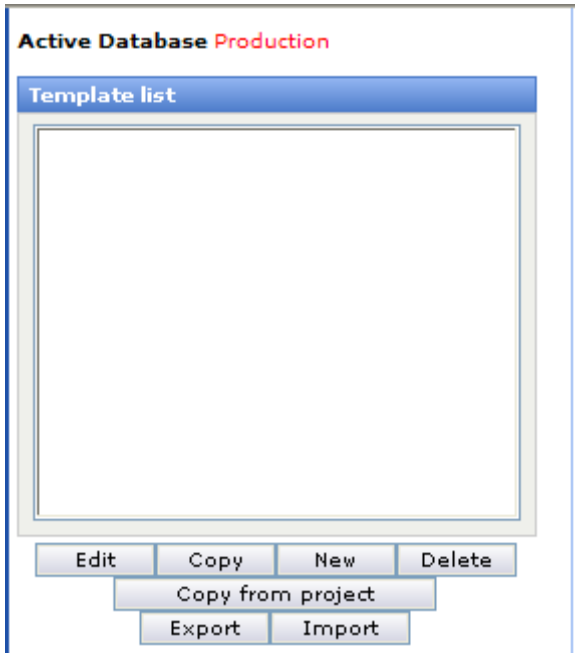


Figure 742 The Template List for the Production database - currently empty

To create a new template:

1. Click the **New** button.

   The Template Details page opens as shown below.

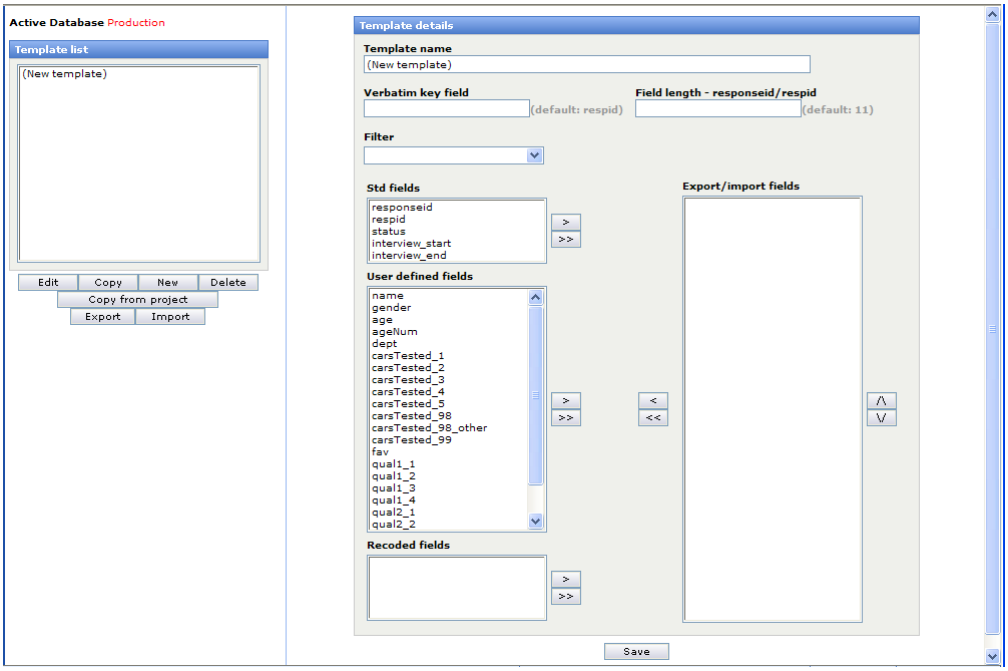


Figure 743 The Template Details page

The fields are as described below:

- **Template name** - the template name. Note that the name cannot include spaces.
- **Template type** - for exports from projects with loops, there are two types of template definitions available with different degrees of flexibility (go to Data Export Templates for Projects with Loops on page 536 for more information).
- **Verbatim key field** - Open Text questions that have no field width specified (go to Question Properties on page 160 for more information) will not be included in the export files when you export to fixed width ASCII, unless you select "Truncate Open Ends". (Open Text questions by default have no field width limitations, so if it is not specifically applied to them, they are infinite.) So when exporting to fixed width ASCII, a separate export must be done for the Open Text questions (go to Question Properties on page 160 for more information). These files will by default use respid as identification of the respondents, but if the data files include another id you would rather use (for example a member id) type it into the “Verbatim key field”.
- **Field length** – responseid/respid - here you can specify the number of characters for the respid and responseid columns in Fixed Width Data Exports. The default length is 11 characters.
- **LoopID** - select the loop for which you want to edit the fields, or select “Top level” for all the variables that are not inside any loop (go to Data Export Templates for Projects with Loops on page 536 for more information).
- **Loop IDs** - when a loop is selected in the loop ID drop-down, the loop ids (the variables that hold the iteration code) are available here (go to Data Export Templates for Projects with Loops on page 536 for more information).
- **Filter** - choose between Closed Ends and Open Ends. The chosen type of questions will be available in user defined fields. Note: Open text questions with Field Width specified are handled as Closed Ends.
- **Std fields** - these are standard system-generated fields.
  - **responseid** - the respondent identification assigned when the respondent starts answering the survey.
  - **respid** - the respondent identification assigned when the respondent is added to the respondent list.
  - **status** - the status of the interview. C*omplete* if the respondent has reached the end of the questionnaire (or a STOP node where status is set to complete), *screened* if the respondent has reached a stop node where status is set to screened, *quota_full* if the respondent has reached a stop node where the status is set to quota full, and empty if the respondent has not finished the questionnaire.

- **interview_start** - the time when the respondent entered the questionnaire. If the respondent is allowed to re-enter the questionnaire, it will be the last time the respondent entered the questionnaire.
- **interview_end** - the time when the respondent finished the questionnaire, either from a STOP node or by reaching the end of the questionnaire.

- **User defined fields** - all the variables from the questionnaire, including hidden questions, but excluding recoded variables.
- **Recoded fields** - all recoded variables from the questionnaire (go to Recoding Data on page 469 for more information)
- **Export fields** - these are the fields that will be included in the exports performed using this template.

2. Type in a logical name for the template.
3. Make the appropriate settings and selections in the remaining fields.
4. For the Std fields and User defined fields, click on a field to select it then click the **>>** button to move it to the Export/Import fields.
5. On completion, click **Save** to save the template.

The template is added to the list.

From the template list you may also choose to *Edit*, *Copy* or *Delete* an existing template. Select the template from the list and click the desired action.

You may change the order of the variables in the Export/Import fields column. To do so, click on an item in the list to select it, then click the ∧ and ∨ buttons to move the item to the desired place in the list.

25.3.1.1. Import of Export Templates

You can import into one project an export template from another project, and copy export templates within the same project between the Production and Test databases. When importing a template from another project, note that the variables in the import template must exist in the project into which the template is imported.

To import a template into a project:

1. Go to the **Survey Data > Template Editor** menu command and click the **Copy from project** button.

   The Copy wizard page opens.

2. In the right frame, search for the project from which you want to import the export template.

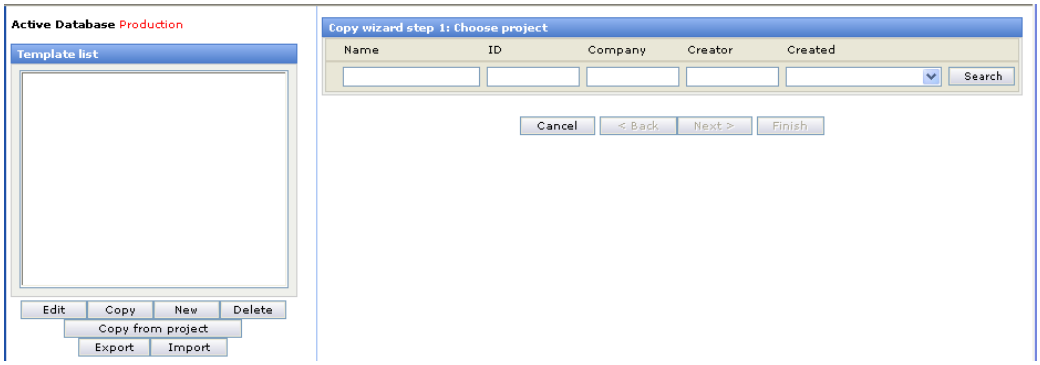


Figure 744 Importing a template into a project

3. Find and select the required project, then click **Next**.

   All export templates that are available in the selected project will be displayed.

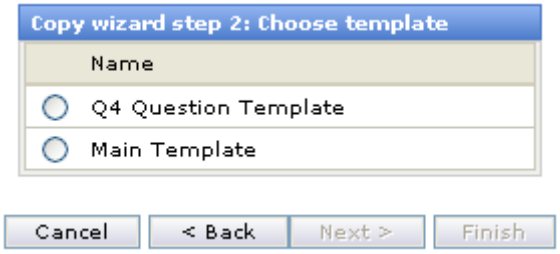


Figure 745 Choosing the template

4. Choose a template from the list and click **Finish**.

   The template will be copied over to the current project's template editor.

Note: When copying an export template from for example the Test database to the Production database, follow the same steps as described above after you have changed the database in the lower right corner of the Confirmit window.

25.3.1.2. Data Export Templates for Projects with Loops

If a project contains loops, you can choose between two different template types. The **normal** type can be used both for separate file and single file export, whereas the **single file** type only can be used for single file exports.

You can filter the template list on these two types, or show all templates (default).

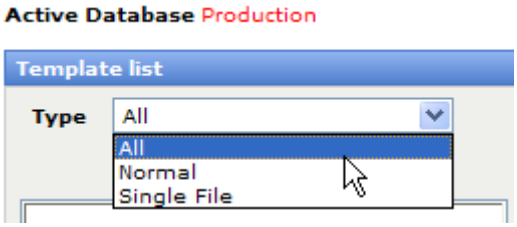


Figure 746 Filtering on Template Type

When creating a new template in a project with loops, you must first select the type:

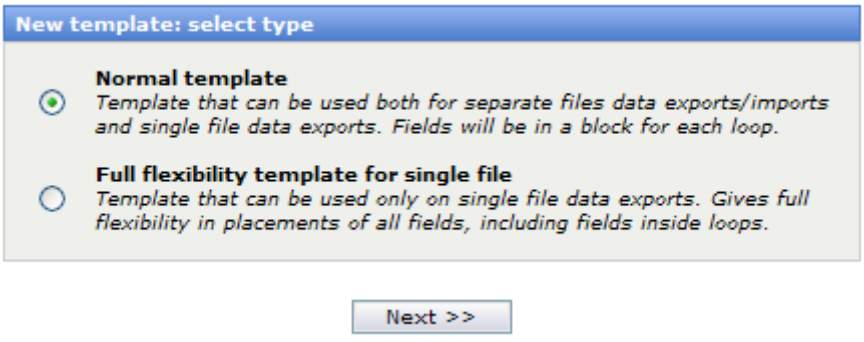


Figure 747 Choosing the Template Type

A "separate files" data export means that there will be a separate file for each loop, and that in the loop files there will be one row per iteration per respondent – i.e. several rows per respondent. A "single file" export means that there will be one row for each respondent, and the variables within the loop will be split into different sets for each iteration.

The "normal" template designer can be used to design templates for both of these types. The Loop field will then have to be linked as a block within the single file or in a separate file. The "Full flexibility template" can only be used for single file exports, and gives you the ability to order all fields freely, including the loop fields.

Note: Full flexibility templates are only available for Tab and comma delimited ASCII file exports, fixed width ASCII file exports, SPSS, and Excel definition file exports.

The examples in the topics linked below use the project shown in the figure below.

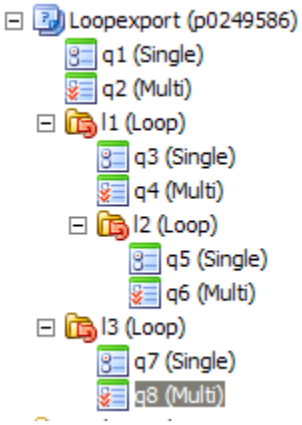


Figure 748 Example of a project with loops

All of the questions and loops in this questionnaire use an answer list with five items, with the precodes 1 to 5.

25.3.1.2.1. Normal Data Export Templates for Projects with Loops

This section looks at the "normal" template editor.

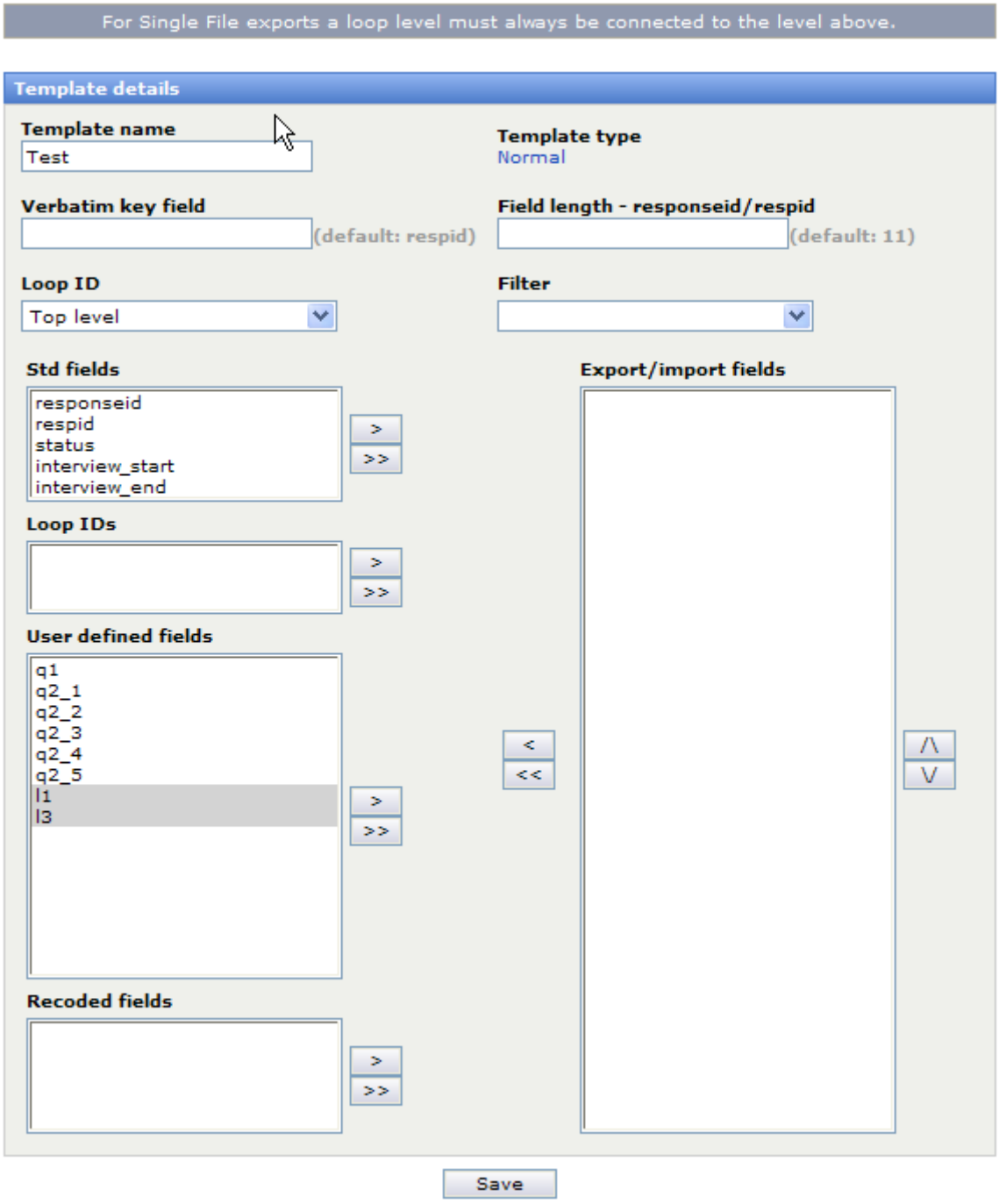


Figure 749 Example of a data export template editor for a project with loops

- **Loop ID** - select the loop for which you want to edit the fields, or select “Top level” for all the variables that are not inside any loop.
- **Loop IDs** - when a loop is selected in the loop ID drop-down, the loop ids (the variables that hold the iteration code) are available here.

To include a loop and its contents, move it from “User defined fields” to Export/import fields. The gray shading indicates that it is a placeholder for all the variables in that loop.

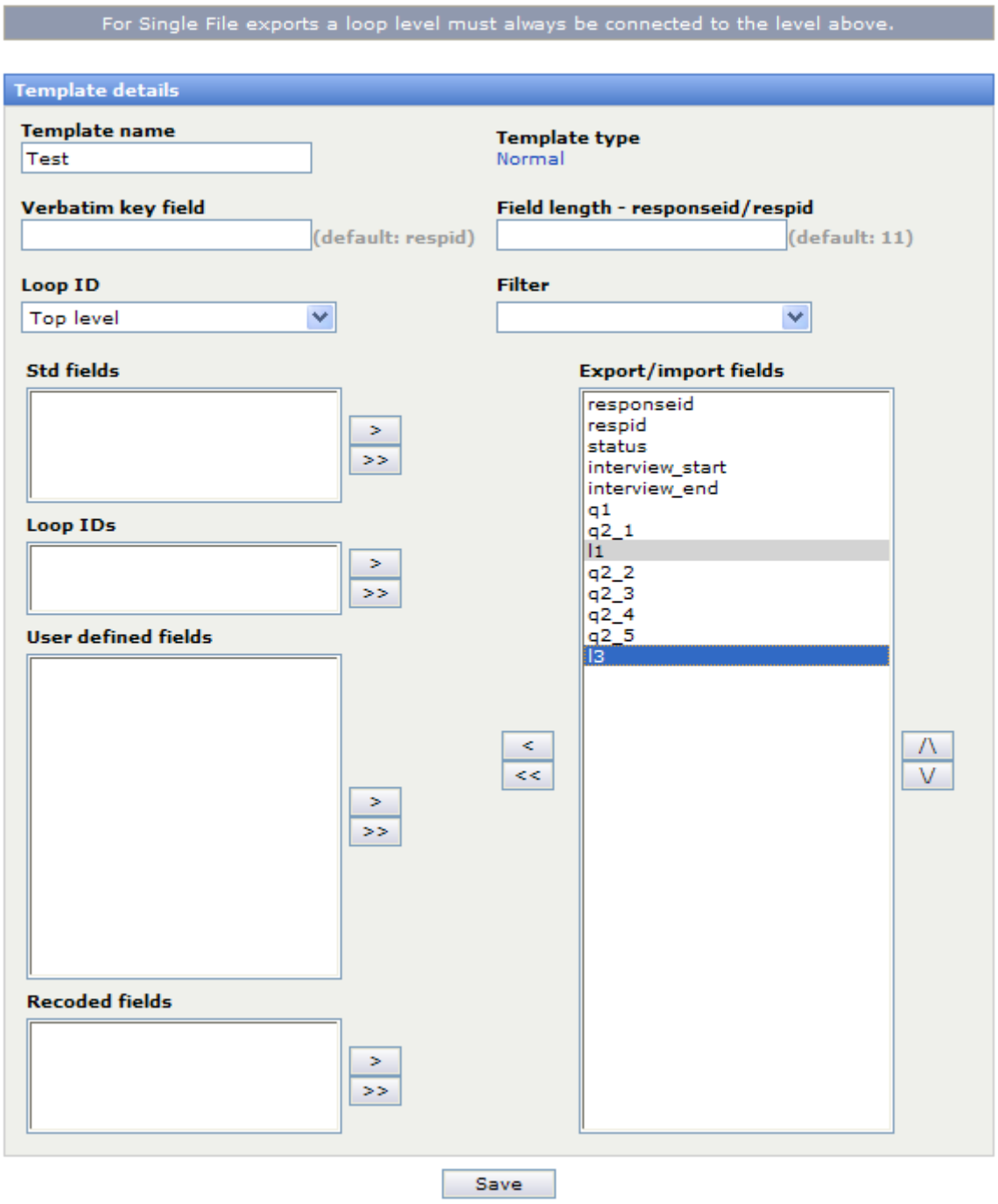


Figure 750 The Loop items selected

The fields in the “User defined fields”, “Recoded fields”, and export/import fields are filtered based on what you activate in the loop ID drop-down, so that only variables that belong to the loop (or at top level) are shown.

Before switching between different loops with the loop ID drop-down, save the changes you have made.

Both the order of the fields and what fields you select in the template will be reflected in the data export files when you order with a template selected instead of “all fields”.

The gray shading behind the loop ID indicates that it is a placeholder, and represents the entire loop including all variables you select for that loop. The loop is exported as a block. In “separate file” export the loops will come in separate files, so it does not really matter where you place the loop block. In “single file” exports the loop ID represents where the block with all the variables from all iterations is placed within the export file. So in single file exports, you have to make sure that the loop block is included in the level above.

When a particular loop is selected in the “loop ID” drop-down, its loop ID can be selected and included in the export/import fields. These ids will not have the gray shading, because on the same level it will represent the loop ID (where the iteration precode is held) – not the entire loop block.

Here, the loop l1 contains the questions q3 and q4 and the loop l2 (nested loops). q4 is a multi with 5 items with precodes 1-5 in the answer list, so the data export will have the variables q4_1, q4_2, q4_3, q4_4, q4_5.

When the loop l1 is selected in the loop ID drop-down, the loop ID l1 will be available from “Loop IDs”. If you move it to export/import fields, the iteration precodes will be included in export files when “separate files” is chosen.

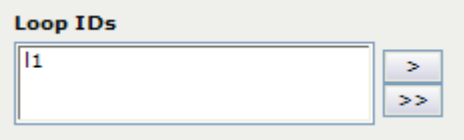


Figure 751 Loop IDs in loop l1

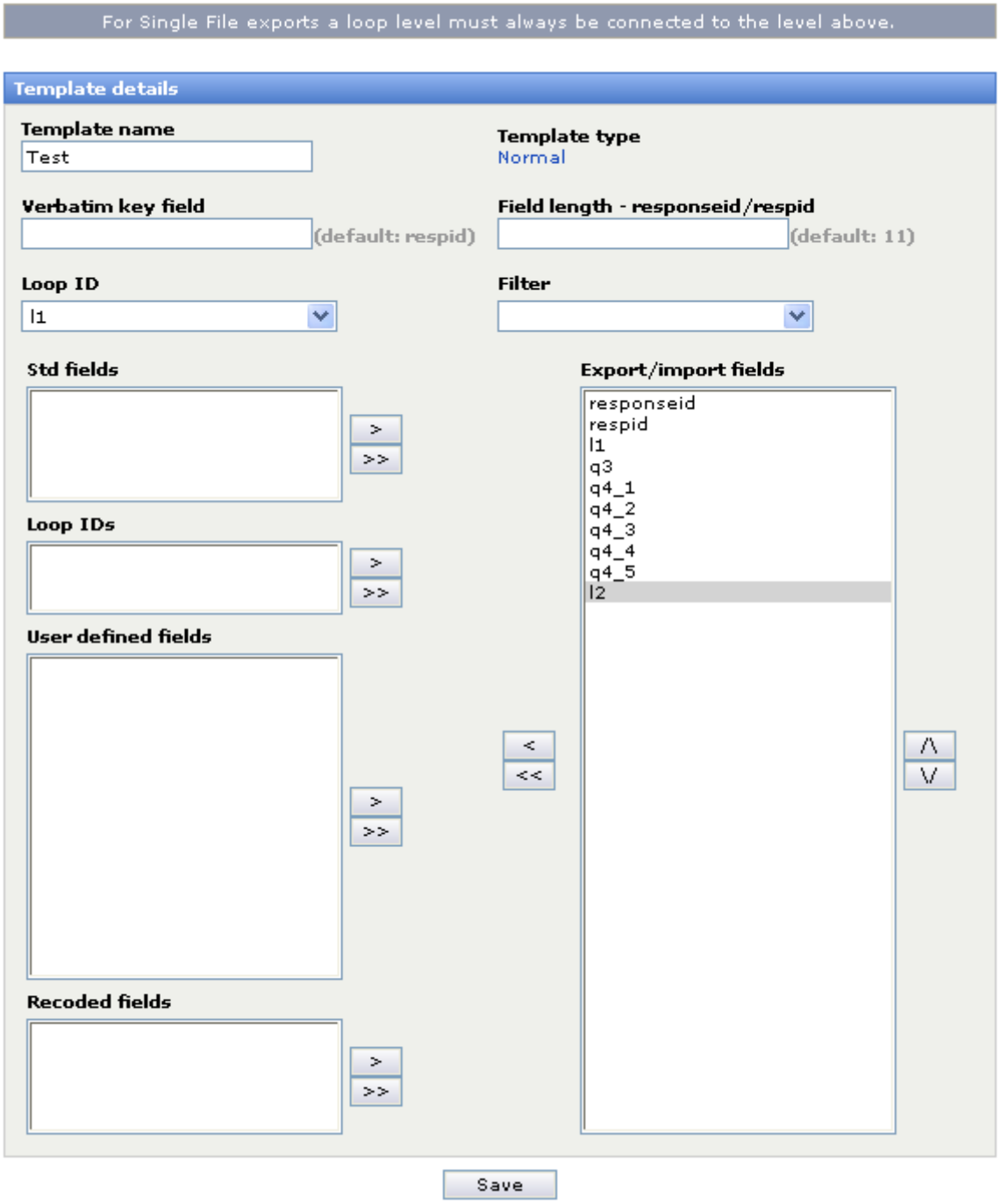


Figure 752 The Export/import fields for loop l1

In the innermost of the nested loops, l2, both the Loop IDs of the outer loop l1 and the inner loop l2 are available:



Figure 753 Loop IDs in l2

- In **separate file loop export** loop IDs and the respid and responseid std fields can be included in export/import fields of a loop block, and will then be included in the file with the variables from that loop.

- In **single file loop export** all the std fields will be ignored except for at top level. Loop id fields will never be included, because the precodes are included in the variable names generated in the single file export.

Consider a single file export with the same example project:

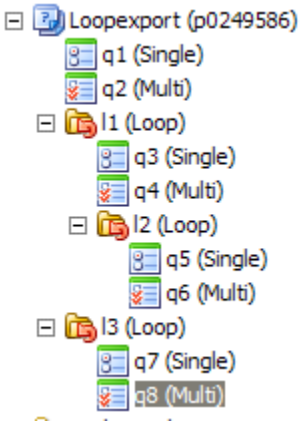


Figure 754 Project with loops

All the questions in this project have an answer list with precodes 1-5, and all loops have loop member lists (iterations) with precodes 1-5. If the top level is defined as shown below:



Figure 755 The top level

then the single file will first have the variables

responseidrespidstatusinterview_startinterview_endq1

Then the items inside the first loop, l1 will follow. Let us say that the fields of l1 are put in the following order:



Figure 756 Loop l1

In single file exports the fields will be output iteration by iteration – i.e. first all fields for iteration 1, then all fields for iteration 2, etc. The iteration precode will be added to the end of the variable name, i.e. q3_1 for iteration 1 of q3. So, first, we will get the first variables for the first iteration:

q3_1q4_1_1q4_2_1

but as the project has nested loops (loops within loops), we move on to the loop l2, which is inside l1. So now all variables for the loop l2, for the first iteration of l1, will follow. The fields of l2 have been defined as:



Figure 757 Loop l2

So, now – first the l2 variables for first iteration of l1, first iteration of l2:

q6_1_1_1q6_2_1_1q6_3_1_1q6_5_1_1q6_4_1_1q5_1_1

The std fields and l1 and l2 will be ignored. In a separate file export they would have been included, but in a single file export it will not be meaningful to repeat them for all iterations.

Now the l2 variables for first iteration of l1, second iteration of l2 will follow:

q6_1_1_2q6_2_1_2q6_3_1_2q6_5_1_2q6_4_1_2q5_1_2

and so on up to the last (5^{th}) iteration of l2, first iteration of l1:

q6_1_1_5q6_2_1_5q6_3_1_5q6_5_1_5q6_4_1_5q5_1_5

Then we are finished with the l2 block for the first iteration of l1 and move back to the last variables for the first iteration of l1:

q4_4_1q4_3_1q4_5_1

After this we would run through the same for all the 4 remaining iterations of l1 – and for each of these run through five iterations of l2, before we get back to the top level again and do the next top level variables:

q2_1q2_2q2_3q2_4q2_5

Then it is the last loop, which does not contain any further loops (no nesting), so we run through all 5 iterations of variables in the defined order:

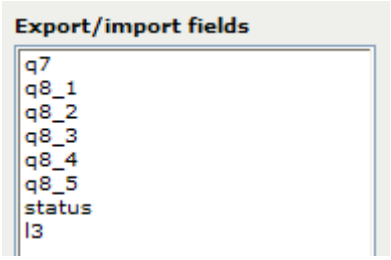


Figure 758 Loop l3

Again, in a single file export the std field status and the loop id itself, l3, is ignored.

We get the following variables in this order from this loop definition in a single file export:

q7_1q8_1_1q8_2_1q8_3_1q8_4_1q8_5_1q7_2q8_1_2q8_2_2q8_3_2q8_4_2q8_5_2

…and so on until

q7_5q8_1_5q8_2_5q8_3_5q8_4_5q8_5_5

25.3.1.2.2. Full flexibility template for single file

The other template type for projects with loops can only be used for single file exports. It does however give full flexibility regarding the placement of all the fields, including loop fields.

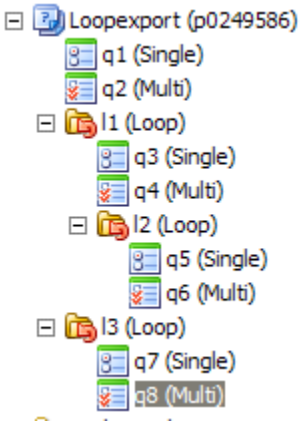


Figure 759 Example of a project with loops

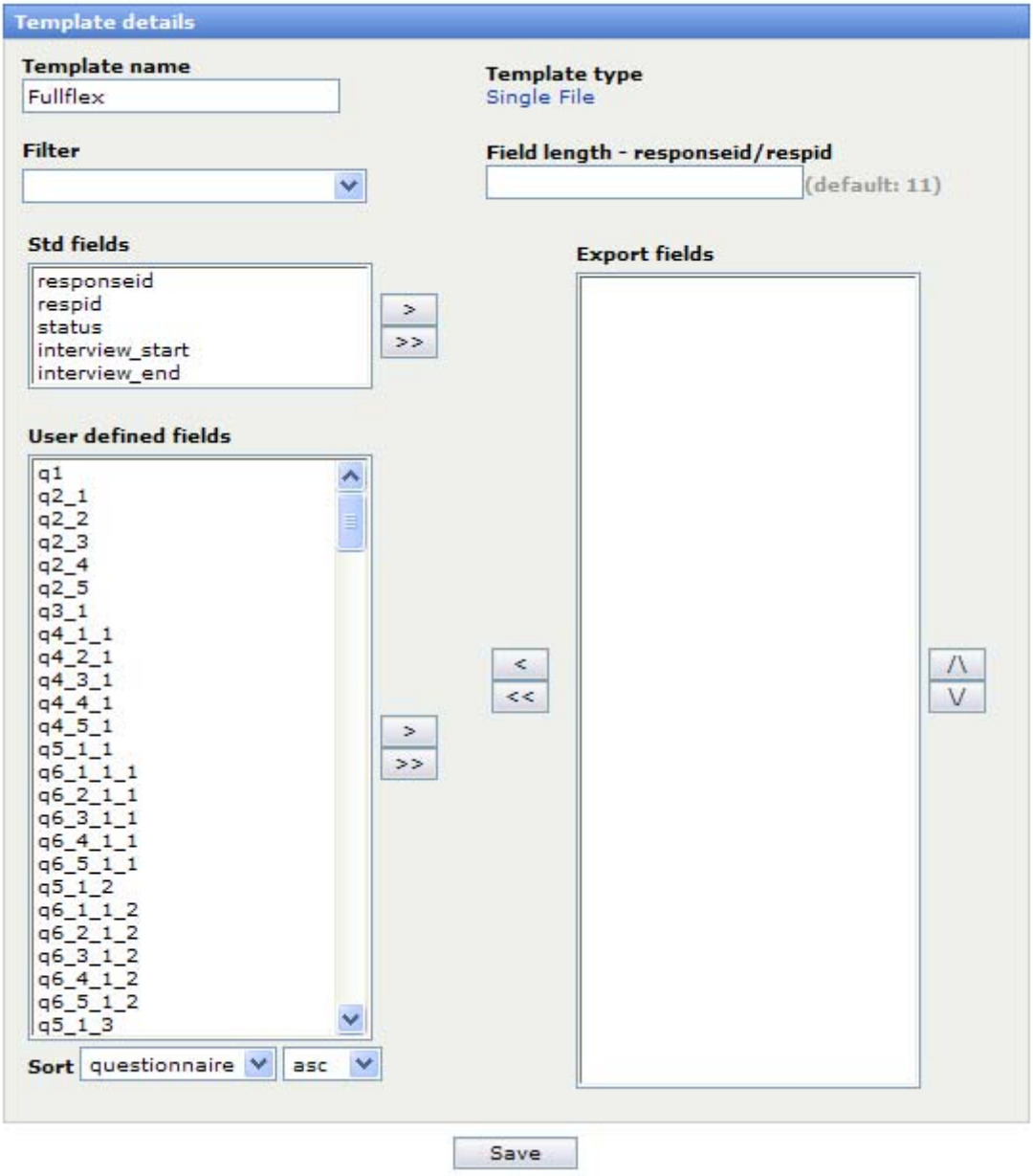


Figure 760 Example of a full flexible template for single file export

Here all loop fields are expanded with iterations. If you for example look at the single q5, which in the project is placed inside the loop l2 which is inside loop l1, the list of user defined fields will include all the 25 fields for this variable.

q5_1_1 (first iteration of l1, first iteration of l2)

q5_1_2 (first iteration of l1, second iteration of l2)

q5_1_3 (first iteration of l1, third iteration of l2)

q5_1_4 (first iteration of l1, fourth iteration of l2)

q5_1_5 (first iteration of l1, fifth iteration of l2)

q5_2_1 (second iteration of l1, first iteration of l2)

q5_2_2 (second iteration of l1, second iteration of l2)

… and so on.

You may freely mix variables from different iterations, different loops and variables from outside any loops and place them in any order you like with this template type. As this will give a very long list of questions, some sorting options are available at the bottom of the page:

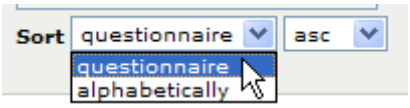


Figure 761 The sorting fields

You can sort ascending or descending alphabetically or by the order of the questions in the questionnaire routing.

25.3.2. Exporting Data from a Legacy Database

Note: The functionality and options available in the menus and export dialogs differ depending on whether the project is set to use the Legacy or Optimized database format. This section and the sub-sections under describe the export functionality for the Legacy database format.

1. Go to the **Survey Data > Exports** menu command.

   The Exports dialog opens as shown below. The first step is to choose the export type.

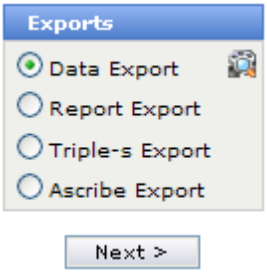


Figure 762 Choosing the export mechanism

The options are as follows:

- **Data Export** - choose this for export of response data (the respondents' answers) to MS Excel®, ASCII text files or SPSS.
- **Report Export** - exports to MS PowerPoint® and MS Excel® of the reports you have defined for your project.
- **Triple-s Export** - exports response data in triple-s format (go to Triple-S Export on page 557 for more information).
- **Ascribe Export** - exports the questionnaire and codebook definitions, and response data, to XML format that can then be imported into Ascribe (go to Ascribe Export on page 559 for more information).

2. Click in the appropriate radio button to select the export mechanism.
3. Click **Next**.

The next page in the process depends on the selection you have made here.

Note: To export to MS Word, use the Designer > Export Survey to Word menu command (go to Exporting to MS Word® on page 561 for more information).

25.3.2.1. Data Export

If you go to the **Survey Data > Exports** menu command, then select **Data Export** and click **Next**, the property list shown below opens. Note that the properties available will depend on the Export Format selected.

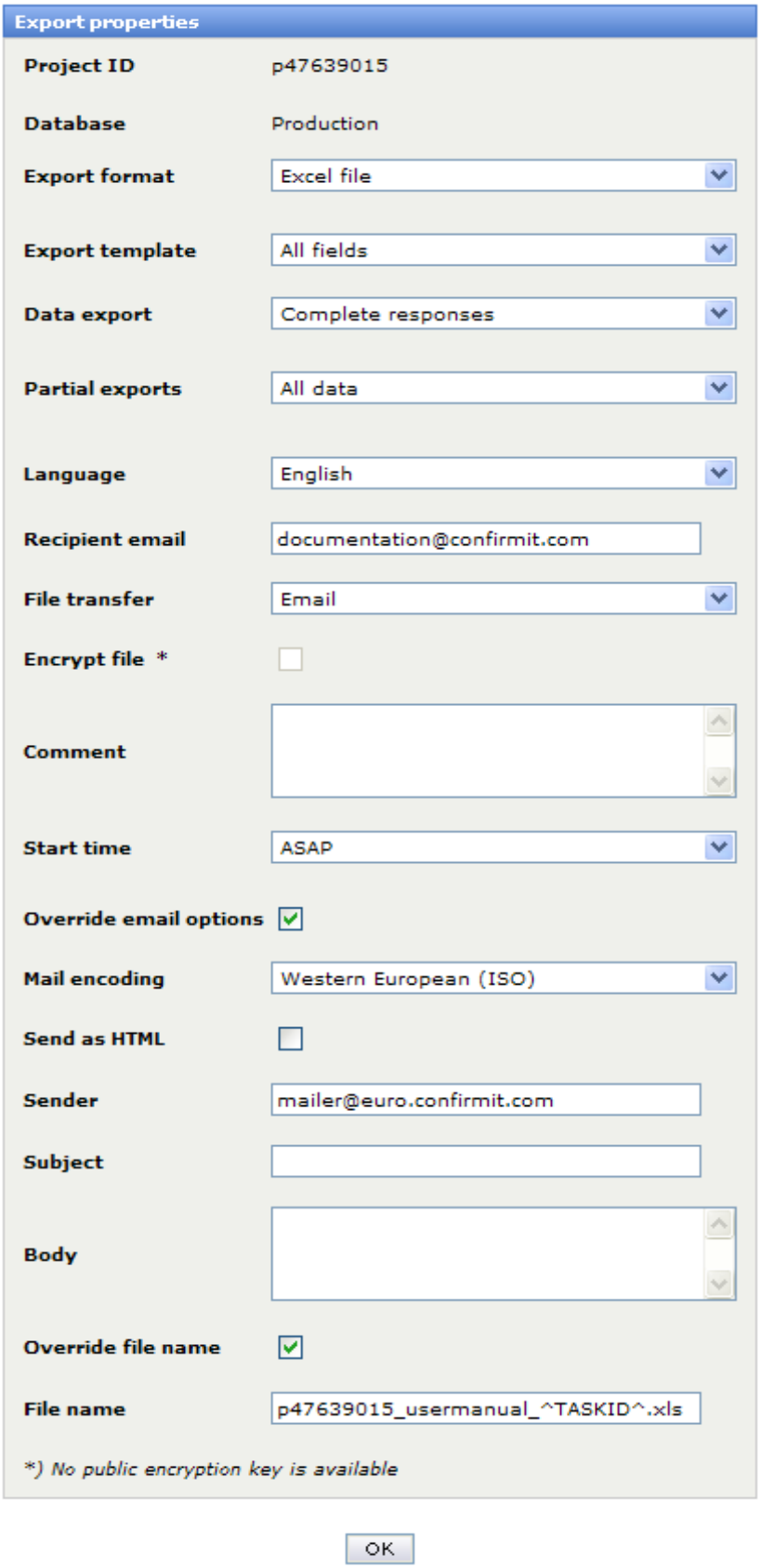


Figure 763 The Data Export property list

Click the links below for further information on the various properties.

25.3.2.1.1. Export Format

The Export Format options are as listed below:

- **Excel file -** MS Excel® file in the Office version specified (go to User Settings on page 120 for more information). 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. The rest of the cells have contents as described in the Data Transfer section.
- **Excel file – labels -** Similar to “Excel file” export, but instead of precodes the file will contain answer texts (labels) in the language you choose when ordering the export.

  The first row will have variable names as in the “normal” Excel file. The second row will have question titles or, for grids and multi questions, the answer text of the item.

  The data cells will have text or number answered for Open Text and numeric questions. For single questions contents will be labels of the respondents’ answers from the answer list and for grid questions contents will be labels of the respondents’ answers from the scale. For ordinary multi questions the cells will have 0 for not chosen and 1 for chosen. For loops contents will be the iteration precodes.
- **Delimited text file, comma separated, quoted** - Comma (,) separated ASCII text file. All answers will be inside quotes ("").. The variable names will be in the first row.
- **Delimited text file, tab separated, not quoted** - Tab separated ASCII text file. No quotes (").. The variable names will be in the first row.
- **Fixed-width text file -** Fixed-width ASCII text file. Will give an export file of single, multi and grid questions. If Open Text questions have field width specified (go to Question Properties on page 160 for more information), they will be included as well. Exporting Open Text questions where the field width has not been specified can be done by selecting "Open Text Questions", or by selecting "Truncate Open Ends" (go to Open Ends on page 549 for more information). The field widths will be equal to the field widths from properties of the questions if provided or else to the default of the database. The fields with numeric responses will be zero-filled, so for example a precode 1 with a field width of 3 will be reported as "001".
- **Excel definition file for fixed-width text file -** Will generate a MS Excel® file with a description of the exported fixed-width text file. (The information provided may be useful for other exports as well.)
  - *Form ID* - The Question (form) ID
  - *Var ID* - The variable name. Form ID and Var ID will be equal for Single an Open Text questions, but will differ for Grids and Multi questions. See the beginning of this chapter for an explanation of the variable names of multis and grids.
  - *StartCol* - The start position of this variable in the export file, counting characters from left to right.
  - *EndCol* - The end position of this variable in the export file, counting characters from left to right.
  - *Punch*Will list the possible punches (precodes) for these answers corresponding to the texts in the Answer Text field.
  - *Question Text* - The text of the question.
  - *Answer Text* - The text of the answer. (Corresponding to Punch).
  - *Data Type* - Question type (or system generated type).
  - *Level ID* - Loop level. Gives the id of the loop this question is inside.
- **SPSS -** Export a fixed width file and a SPSS definition file.
- **Open-end questions -** Open-end questions are all open questions (Open Text questions, Other, specify from answer lists or Multi questions with Open Text property selected) that do not have a field width specified (go to Question Properties on page 160 for more information). They will be included in the normal export of the tab- and comma-separated text files and the Excel files, but not in the fixed width text files. If you choose "Open-end questions" you will receive a "fixed-width" ASCII text file with three columns: Respondent ID, Question ID and that respondents answer to that Open-end question. The respondent ID will by default be respid, but you may choose a different ID by selecting a different "Verbatim key field" in your template (go to Template Editor on page 533 for more information). For open-ended questions inside loops, the loop id(s) will also be included.

25.3.2.1.2. Export Template

Choose between "all fields", or a user-defined template for a subset of the fields(go to Template Editor on page 533 for more information).

25.3.2.1.3. Data Export

Filter the data export on status. The default is Complete responses only.

25.3.2.1.4. Open Ends

For SPSS and Fixed-width ASCII files, the open ended questions (open text questions with no field width specified) are by default not included because they are unlimited. However they can be included if you specify a field width. Answers longer than the value specified here will be truncated.

This choice is only available for fixed-width text files, Excel definition files for fixed-width text files and SPSS exports.

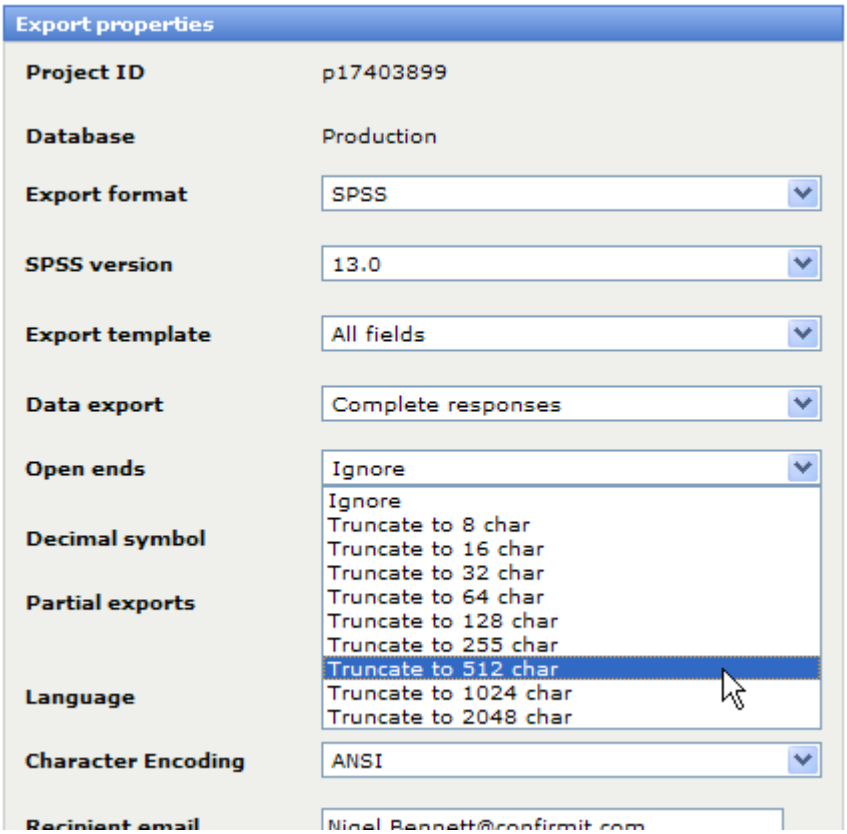


Figure 764 Truncating Open Ends

25.3.2.1.5. Decimal Symbol

For text file export (tab delimited, comma separated, fixed width) and SPSS export, choose between using point (.) or comma (,) as decimal symbol.

25.3.2.1.6. Partial Exports

Click the down-arrow beside the Partial Exports field to open the drop-down list as shown below.

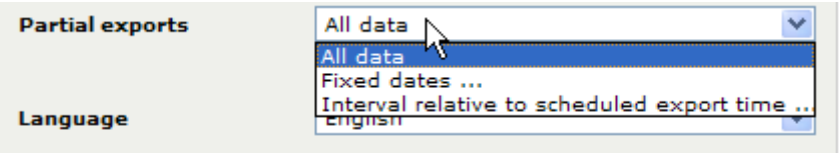


Figure 765 The Partial Export properties

Relative partial export allows you to export data from different time intervals relative to the scheduled export time. This is useful when data exports are running as recurring tasks. The options are as follows:

- **All data –** the default - all data will be exported.
- **Fixed dates –** the user may specify fixed from/to dates for the export (the same as the "old" Partial exports functionality).
- **Interval relative to scheduled export time –** the user may specify a relative from/to time interval.

Note: If you are performing a partial export using "Fixed Dates", then the interview_start value will be used by Confirmit to calculate which responses are to be included in the export.
If you are using "Interval Relative..." and the Interview status is "Complete", then the interview_end property is used to calculate which responses are to be included in the export. If you are using "Interview Relative..." and any other status, then the interview_start property is used.

Interviews generated with "Allow user to modify answers"

If the interview is generated with "Allow user to modify answers after initial submission." or "Allow user to modify answers after the interview is complete.", then the respondents are allowed to re-enter the survey. Every time they re-enter, the interview start time is reset. This could lead to overlaps when using partial exports, but the respid remains unique so it will be easy to find duplicates in exports performed on different dates.

Fixed dates

It is possible to export a partial data set for just one specific period of time, instead of the default of exporting the entire data set. Fixed dates export can be performed for exporting response data files to all formats (ASCII, Excel and SPSS), but not for the Excel definition file. The data set is limited by the start date and end date. The Start date will limit the export to responses that started on or after the specified date. The End date will limit the export to responses that started on or before the specified date. The time stamp that is used is the time the respondent opened the interview and it is stored in the variable "interview_start".

Relative partial export

When the user has chosen the "Interval relative to scheduled export time", he/she will be able to define Interval start and Interval end. The user can specify the data export interval (in weeks, days, hours, etc.) as related to the time when the task is set up to run.

For example: If a task is set to run every Monday at 00:00, and the user wants to export data from the last week, he/she can set up the export task with these "relative" setting:

Interval start: Weeks = -1w Days= (not specified) Hours= (not specified) Minutes= (not specified)

Interval end: Weeks = (not specified) Days= (not specified) Hours= (not specified) Minutes= (not specified)

A more complex example: Let us assume that a data export has been scheduled to run at a specific point of time N, and the user wants to receive data for an interval:

start= N - (2 weeks + 3 days) end= N - (1 week + 5 hours + 30 minutes)

The interval length will be as follows: (2 weeks + 3 days) - (1 week + 5 hours + 30 minutes) = (1 week + 2 days + 18 hours + 30 minutes)

To perform a data export for the above-mentioned interval, enter the following specifications in export properties:

Interval start: Weeks = -2w Days= -3d Hours= (not specified) Minutes= (not specified)

Interval end: Weeks = -1w Days= (not specified) Hours= -5h Minutes= -30m

25.3.2.1.7. Timestamp filename

When ordering partial exports, you can choose to include the start and end timestamps of the data export period.

The file name will be, for example, as follows:

p0005050_johndoe_^START^_^END^_^TASKID^.xls

25.3.2.1.8. Language

Select from the project's active languages, the language in which Question titles and labels are to be presented. (Relevant only for Excel definition file and SPSS export).

25.3.2.1.9. Character 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.

25.3.2.1.10. Recipient Email

The export file is sent to this mail address.

25.3.2.1.11. Comment

Add comments to this field to simplify identification of the task in the Task Management page.

25.3.2.1.12. Start Time

This property specifies when the export task is to be added to the task list. Select either Immediately ("ASAP") or "Schedule for later execution" in which case the Task Settings page opens, where you specify when the task is to be executed and can set it up as a recurring task.

25.3.2.1.13. Override Email Options

This option allows you to override the standard export email options and customize both the subject and the email that will be sent to the export recipient.

25.3.2.1.14. File Transfer

This property is only available/displayed to users with Data Transfer Encryption (go to Data Transfer Encryption and FTP on page 2 for more information). Choose to either receive the encrypted file by email, or download it from the FTP server. If you choose to send the encrypted file to the FTP server, you will receive a notification email from Confirmit that the file is available for download. You must then log on to the FTP server, download the file, and then decrypt it using the private encryption key.

25.3.2.1.15. Encrypt File

Only available/displayed to users with Data Transfer Encryption (go to Data Transfer Encryption and FTP on page 2 for more information). The file will be encrypted.

25.3.2.1.16. Export File Name

All export tasks will generate files with unique names in the following format:

<projectid>_<export format>_<userid>_<taskid>.<extension>

For partial exports, you can include the start and end time-stamps of the data export:

<projectid>_<userid>_<start>_<end>_<taskid>.<extension>

The "Override file name" functionality allows you to override the system-generated name. Tick this check-box to open the "File name" text-box. Here you can edit the system-generated name. There will be two text-boxes to edit for SPSS exports: "File name data" and "File name SPSS definition".

A parameter ^TASKID^ is introduced to enable you to include the taskid of the data export task in the file name. If this is not included and the file is recurring, the file will be exported with the same name every time the task is run.

25.3.2.1.17. SPSS Export

Choose SPSS from the **Export Format** drop-down menu to order the SPSS export. The Export Properties page opens.

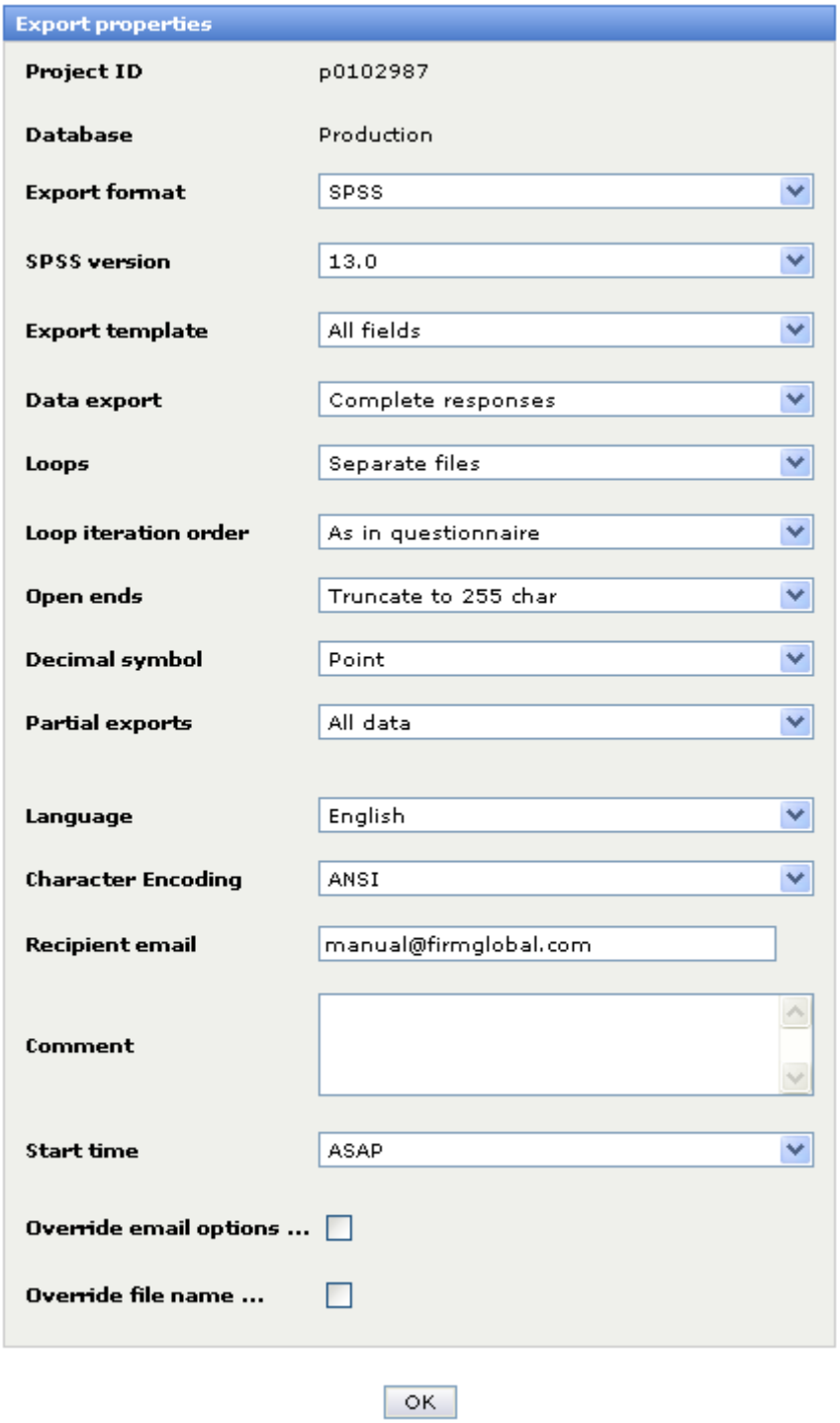


Figure 766 SPSS Export

Make the required settings for the various properties.

Note: Different SPSS versions have different limitations for various elements of the export, either on variable names, labels or data. Confirmit will export according to the limits defined by the selected SPSS version (go to SPSS Export Limits on page 553 for more information). Note that an export created for one version of SPSS is supported in all subsequent versions of SPSS; E.g. an export in SPSS version 11 will be supported in version 12, 13, 14, 15 etc.

The SPSS export will create a fixed-width ASCII file and an SPSS syntax file (with extension .sps); a **.sav** file will not be created directly. See the following section for details on creating the .sav file.

Creating the .sav File

To create the **.sav** file:

1. Extract the zipped, fixed-width ASCII file and save it in the **C:\temp** folder on your computer.
2. Open the syntax file (.sps) in SPSS.
3. Run the script, either by choosing **Run > All** or by selecting all syntax and clicking the  button (see the figure below).

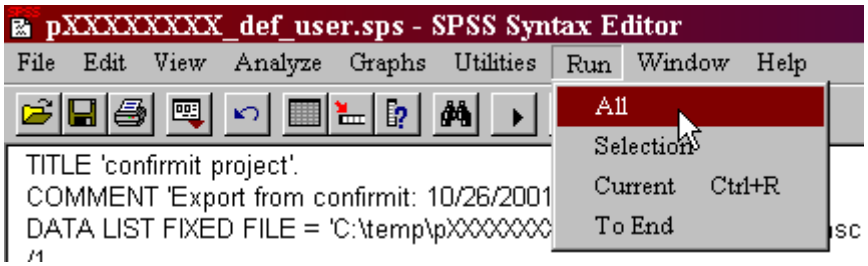


Figure 767 Run SPSS script

SPSS Export Limits

The various elements for which limits exist in the different SPSS versions are as follows (the limits are listed below):

- **max record length** - the maximum number of characters per row in the fixed width data file.
- **max field width** - the maximum number of characters per field in the fixed width data file.
- **max var name width** - the maximum number of characters per variable name in the SPSS def file.

  The SPSS syntax file will use the variable names in Confirmit. For open text and single questions and loop ids this will be the question id (for example q1). For multi and grid questions the variable names will be in the form question id + underscore + precode (for example q1_1). All the variable names (for user fields) are given a consecutive number beginning with number 1 for the first field. In the event a variable name must be truncated, the name will then be in the format @<number>. Together with the SPSS syntax file and the fixed width ASCII file there will be a mapping file showing the variable names that have been assigned to all variables.
- **max var label width** - the maximum number of characters per variable label in the SPSS def file.

  The variable labels are usually the same as the question texts. However, for multi and grid questions the variable labels consist of both the answer option for that particular item in the answer list and the question text. Variable labels longer than the limit are truncated so that only the 255 first characters are shown in SPSS.
- **max val label width** - the maximum number of characters per value label in the SPSS def file.

  The answer texts from Confirmit are used as value labels in the SPSS syntax file. The maximum length of the value labels in SPSS is 60 characters. Value labels longer than that are truncated so that only the 60 first characters are shown in SPSS. There are no value labels for open text questions and multi questions.
- **num precode width** - the maximum number of characters in the precode for a coded question if the precode is numeric (if exceeded, there will be no value labels).
- **str precode width** - the maximum number of characters in the precode for a coded question if the precode is alphanumeric (if exceeded, there will be no value labels).

  The maximum length of the precodes in SPSS is 40 characters if they are numeric only and 8 if they include other characters. In Confirmit, the default size for a precode in the Legacy database format is 32 characters (go to APPENDIX A: LIMITS on page 608 for more information). This means that if you use numeric precodes only, and use the default field width or specify a field width less than or equal to 40, the SPSS file will have value labels on the questions. If you do not specify any precodes on your questions, numeric precodes will be assigned by Confirmit. If you use precodes with characters, eg. 'M' and 'F' for gender, you have to specify field widths of maximum 8 characters on your single and grid questions for the syntax file to include value labels for single and grid questions.

- **Type**

  The system fields "respid" and "responseid" will be of type numeric, "status" will be of type string and "interview_start" and "interview_end" will be of type datetime.

Note: An incomplete response will have no value for "interview_end". This will generate a warning when the script for creating the .sav file is run **(go to Creating the .sav File on page 553 for more information)****, but this warning can be ignored.**

  The numeric open text question and all multi questions, except from the open text multi question, are defined as numeric.

  All open text questions are defined as string.

  For single questions and grids the type will be numeric if all the precodes are numeric. If one or more of the precodes are a string, the type will be string.

- **Values**

  The values will be the precodes answered for single and grid questions and loop ids. For ordinary multi questions it will be 0 (not chosen) and 1 (chosen). For open text questions it will be the text answered.

  SPSS has a limit of 32767 characters for values (prior to version 13 this was 255). If the survey contains open text questions with no defined field width, you can choose to ignore these fields in the export, or you can choose to specify a field width by selecting a value from the drop-down list. Answers longer than the value specified here will be truncated.

  Empty fields ("null" in the SQL database) will be imported as "System Missing" in SPSS.

  Numeric data will be displayed with the same number of decimals in SPSS as you have set in question properties.

The limits for the various elements are listed below, grouped for the various SPSS versions.

- For versions of SPSS earlier than version **11.5**, the following limits apply:
  - max record length = 32767
  - max field width = 255
  - max var name width = 8
  - max var label width = 255
  - max val label width = 60
  - num precode width = 40
  - str precode width = 8
  - max decimals = 15
- For SPSS version **11.5**, the following limits apply:
  - max record length = 2147483647 (Limit changed in this version)
  - max field width = 255
  - max var name width = 8
  - max var label width = 255
  - max val label width = 60
  - num precode width = 40
  - str precode width = 8
  - max decimals = 15
- For SPSS version **12.0**, the following limits apply:
  - max record length = 2147483647
  - max field width = 255
  - max var name width = 64 (Limit changed in this version)
  - max var label width = 255

- max val label width = 60
- num precode width = 40
- str precode width = 8
- max decimals = 15

- For SPSS version **13.0**, the following limits apply:
  - max record length = 2147483647
  - max field width = 32767 (Limit changed in this version)
  - max var name width = 64
  - max var label width = 255
  - max val label width = 60
  - num precode width = 40
  - str precode width = 8
  - max decimals = 15

In the event a limit is exceeded, Confirmit will truncate the "offending" value in accordance with the appropriate limit for the selected SPSS version, except for the Variable Name Width limit. If this limit is exceeded, then Confirmit will rename the variable to @ + a number - see above for details.

25.3.2.1.18. Loops

There are two options for exports of loops: Separate files or single files. If the project contains loops, you may choose between these two when ordering your export.

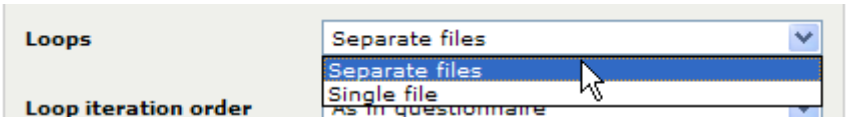


Figure 768 The export options for loops

Separate files

The default export format for loops is to make one export file for each loop. In the files containing the loop data there will be one row for each loop iteration 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.

Single File

Instead of exporting loop data in different files, you can export all data belonging to a project in one single file. This applies to all data export formats, except open-end questions. Note that data fields will keep the order assigned to them in the questionnaire independent of the export template.

To perform a single file export, go to the Data Export window and select **Single file** in the ”Loops” drop down box.

As these single file export files tend to get large, an estimate of the file size is calculated and presented before such an export task is started.

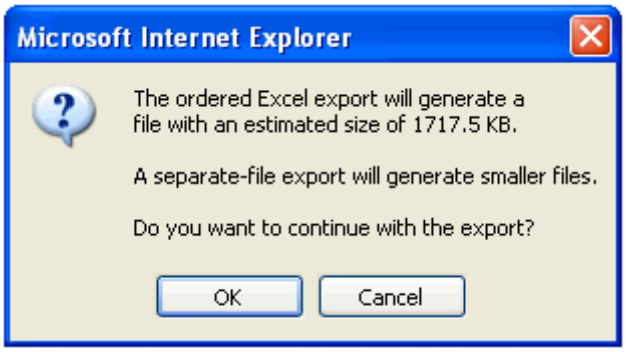


Figure 769 Example of a File Size Estimate dialog

Based on the file size estimate, you may either abort an export task that is large or continue with the export. The export task is automatically aborted if the export file size is larger than the maximum limit specified in the system. The reason for the abortion is presented to the user. The maximum file size is specified in the system's registry, and may be changed by a system administrator.

The export file is added to a zip file. If this zip file is larger than the limit specified in the system, the zip file is not sent by email.The maximum zip file size is specified in the system's registry, and may be changed by a system administrator.

- **On-Premise Customers** may themselves specify the maximum export file size and the maximum zip file size in the system's registry.
- **On-Demand Customers:** Contact support@confirmit.com.

Variable names

The variables names for the loop variables in the single file export will be as in the example below:

<question id>_<precode of iteration>.

This means that for a single question q1, q1_1 could be the label for the 1st iteration and q1_2 for the 2nd iteration. For compounds (multi questions and grid questions) the original label should come first – for example q1_1_1 for answer 1, iteration 1 and q1_2_1 for answer 2, iteration 1 etc.

For nested loops the new names should follow this convention:

<question id>_<precode of iteration, loop 1>_<precode of iteration, loop 2> etc.

where loop 1 is the outermost loop. This means that the last precode will be the id of the innermost loop.

Loop Iteration Order in Data Exports

If a project contains loops, you can choose in which order to export the loop iterations. This setting applies both to separate and single file loop exports. The default is to export loop iterations "As in questionnaire", which means that the iterations will be exported in the same order as in the loop members list of the loop.

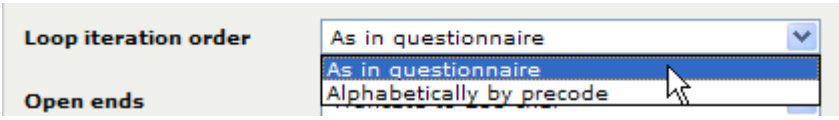


Figure 770 Loop iteration order

It is also possible to have the loop iterations sorted alphabetically (sorted as strings) by the precode. This setting is available for legacy projects, because this is the way loops were previously sorted in Confirmit. Note that with this setting, loop iterations with precodes 1-12 will be presented in the order: 1,10,11,12,2,3,4,5,6,7,8,9.

This setting will eventually be removed and loops will then be exported "as in questionnaire".

25.3.2.2. Report Export

This functionality is explained in the Aggregated Reporting section (go to Aggregated Reporting on page 407 for more information).

25.3.2.3. Triple-S Export

It is possible to perform a Triple-S version 1.1 export in Confirmit. Triple-S version 1.1 is an XML export standard used for moving surveys between survey packages on various hardware and software platforms. A survey exported in the Triple-S standard is referred to as a Triple-S survey.

A Triple-S survey is described in two text files:

- **Definition file –** contains version and general information about the survey, together with definitions of the survey variables. This is used to interpret the contents of the data file. The Definition file has by default file extension 'SSS'.
- **Data file –** contains fixed length records. Each record contains the responses for each of the variables in the corresponding Definition file given by one respondent. All records must be of the same length and must be at least as long as the highest location defined in a <position> element. The Data file has the same name as the corresponding Definition file but the extension 'ASC'.

Triple-S XML is a translation of Triple-S 1.1 into an XML format as specified by the Triple-S XML DTD (Document Type Descriptor). The definition file is coded in XML syntax according to rules given by the associated Triple-S XML DTD.

Note: Triple-S only allows values to be positive integers. If you override the system-given precodes in Confirmit, the resulting Triple-S punch values will not match those in Confirmit. For example: If you override the system-given precodes in Confirmit for a Single question with an answer list of 10 items and you manually insert the precodes 0, 1, 2, 3, 4, 5, 6, 7, 8 and DK, the Triple-S export will give the codes 1, 2, 3, 4, 5, 6, 7, 8, 9, 10.

Note: The Respid and the Responseid is included in all Triple-S exports.

Visit the web site www.triple-s.organd read about Triple-S XML version 1.1 for more detailed information about the definition and data file formats.

25.3.2.3.1. How to Order a Triple-S Export in Confirmit

To order a Triple-S export

1. Go to the **Survey Data > Exports** menu command.

   The Exports page opens.

2. Select the Triple-S Export option and click **Next >**.

   The Export Properties page opens.

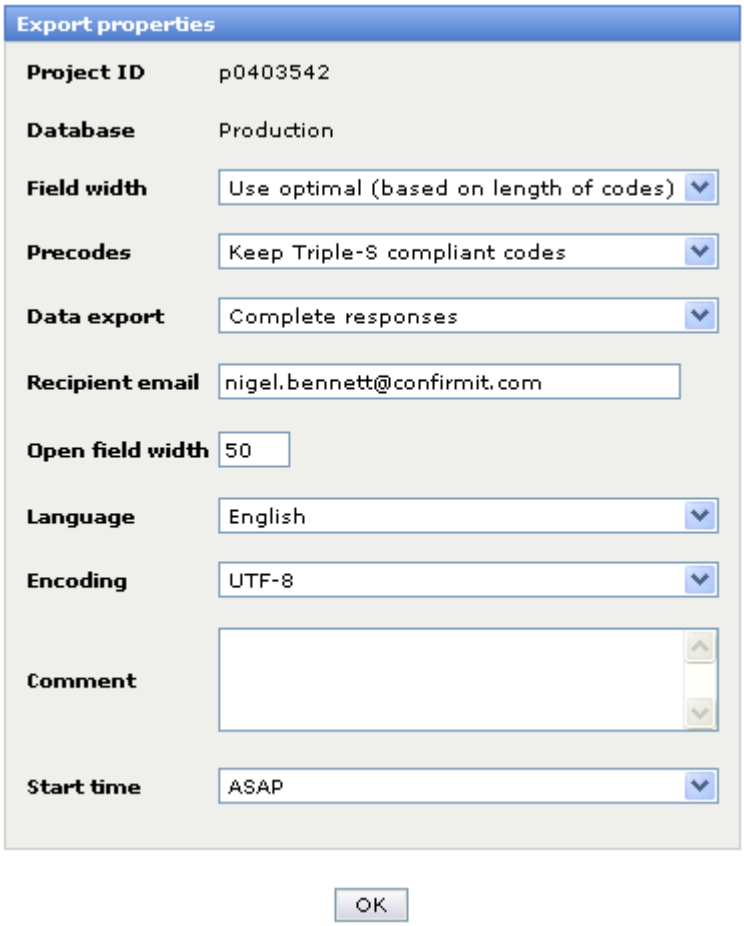


Figure 771 Triple-S Export properties

The details and properties that can be set on this page are:

- **Project ID –** the ID of the project, the data from which will be exported. For information only.
- **Database** – the selected database. Production or test. For information only.
- **FieldWidth** – for field widths on single questions, grid questions and loops, the options are:
  - **Use optimal (based on length of codes)** – (default) the Triple-S export will use field widths on single and grid questions according to the length of the codes of the question. If codes are between 1 and 9, a field width of 1 will be used. If codes up to 99 is used, a field width of 2 will be used, and so on.
  - **Use preset** – the Triple-S export will use the field widths specified in question properties in Confirmit for single and grid questions (or field width 32 (default) if nothing is specified in Confirmit).
- **Precodes** – the Triple-S standard allows positive integers only for precodes, whereas Confirmit also allows zeros, underscores and letters in precodes. Therefore precodes on single questions, grid questions and loops in Confirmit must be recoded into positive integers. The options are:
  - **Keep Triple-S compliant codes** – (default): This will keep the Confirmit precodes when they are Triple-S compliant, so that for example 1,2,3,98 will be kept, but 1,2,3,DK will be recoded to 1,2,3,4.
  - **Recode codes on all questions** – recodes all answer lists into using consecutive, positive integers: 1,2,3,4,... etc.
- **Data export** – choose the type of answers you want to be included in the export. “Complete responses” is the default setting.
- **Recipient email** – type in the email address to which the export files are to be sent.
- **Open field width** - is set to 50 by default (also if empty). Open field width can be set to any value.
- **Language** – select between the languages defined in the project.
- **Encoding** – select the type of encoding to be used. Options are UTF-8, ANSI and Unicode.

- **Comment** – any comments you enter into the Comment field will be displayed on the task in Confirmit and also in the email with the export.
- **Start time** – ASAP, schedule for later execution or recurring task.

3. Enter the email address for the intended recipient of the export into the Recipient email field.
4. Type any required comments into the Comment field.
5. Click **OK** to commence the batch task and display its properties.

25.3.2.4. Ascribe Export

Ascribe™ is an external application for coding open text (verbatim) responses. The application is provided by Language Logic (http://www.languagelogic.info), and is not part of Confirmit or part of any product or service provided by Confirmit. The Ascribe export will result in an XML file with questionnaire and codebook definitions, and response data. It provides you with a simple method of transferring the data from Confirmit to Ascribe.

The XML file can then either be sent by email or transferred directly to an Ascribe FTP server.

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 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.

To perform an Ascribe export:

- If using the Legacy database format, go to the **Survey Data > Exports** menu command, select **Ascribe Export** and click **Next**.
- If using the Optimized database format, go to the **Survey Data > Ascribe Export** menu command.

Note: If the project is set to use the Optimized database format, questions with loop references will not be included in the export.

25.3.2.4.1. The Ascribe Export Settings

When you go to the **Survey Data > Data Exports** menu command, select **Ascribe Export** and click **Next**, the properties page opens.



Figure 772 The Ascribe export settings

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.

- **Language** - the questionnaire texts and code books in the XML file will be included in the language you select.
- **Question type - select one of the options to specify which questions with code books are to be included in the export. The options are:**
  - **All - the entire questionnaire.**
  - **Only opentext** - includes open text questions, other specify options in answer lists and multis with the opentext property.
  - **Only coded opentext** - includes only questions that have been set up to be coded, i.e. open text questions that are referred in the "Coding of" property of a multi question that is set up as an "Open text coding". See the figure below.

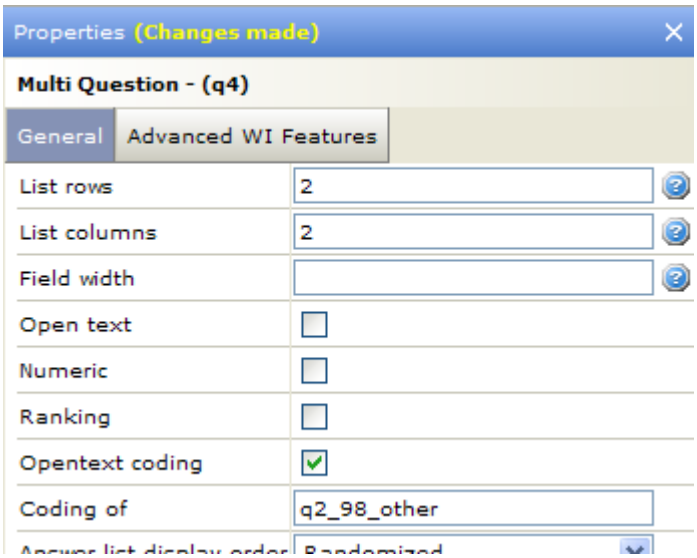


Figure 773 The Opentext coding properties

Open text questions that are referred as "Coding of" in a multi, as in the figure above, will have the answer list of the multi provided as the codebook for the open text. Otherwise, the codebook for the open texts will be empty. When exporting the entire questionnaire ("all"), the codebook of closed questions (singles, grids, multis) will be their answer list.

The Ascribe export also supports loops, and will export all variables, both the ones on the root level, and the ones inside the loops in Confirmit.

- **Response data** - if you want to export only the questionnaire and code books, and not include the response data in the XML file, select **Ignore** in the response data drop-down. Response data may be imported to Ascribe later using one of the data export formats. The default is to include response data.
- **Response data filter** - if you wish to include the response data, you can choose to only export **Complete responses** (default), or export **All responses**.
- **Recipient email** - if your company's account is set up with Ascribe FTP settings, you can choose between transferring the XML file by FTP to the Ascribe server and getting it sent by email to an address you specify. If the FTP options are not set up for your company account, you only have the email option available.
- **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.

25.3.2.5. Exporting to MS Word®

You can export your questionnaire to MS Word® format. **This will export the last compiled version of the questionnaire.** It does not include any kind of skip logic.

Note: Confirmit versions 12.5 and later do not support exports to MS Office versions older than 2003.

Note: The Word Export mechanism may have problems with very large projects, especially when they include very long answer lists. If this causes the Word Export task to abort, you can overcome the problem either by duplicating the project and removing the long answer lists, or by dividing the project into two or more sections just for the Word export.

1. Go to the **Designer > Export Survey to MS Word** menu command.

   The Export Survey... dialog shown below is displayed.

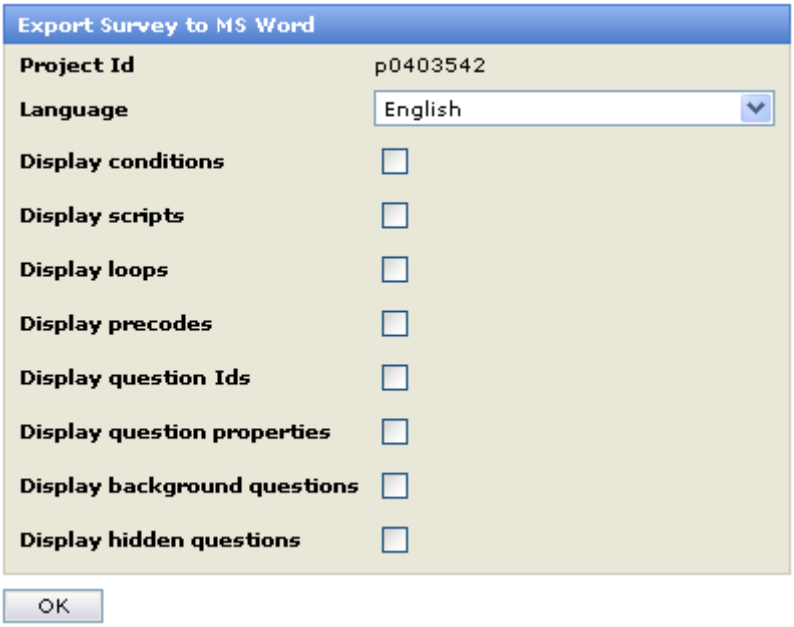


Figure 774 The Export Survey to MS Word dialog

2. Check the boxes for the items you wish to include in the export file.
3. Click **OK**.

   Confirmit generates the document and presents a File Download question dialog.

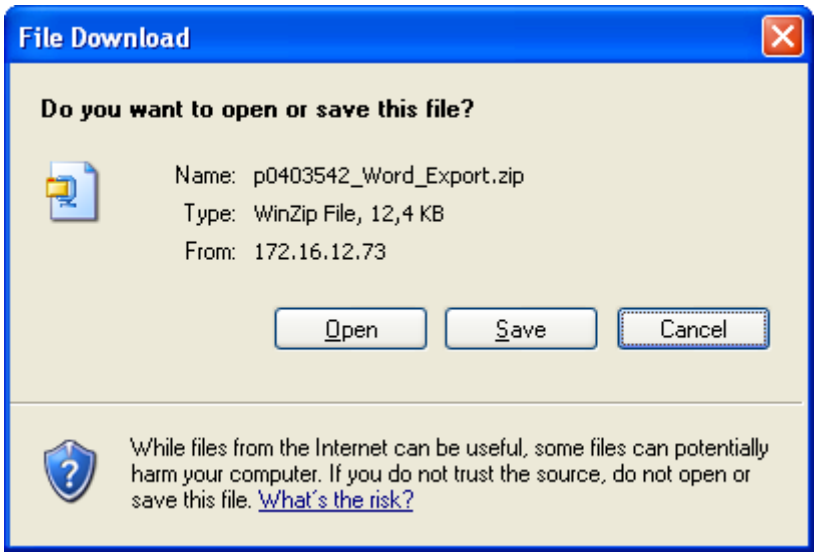


Figure 775 The File Download Question dialog

4. Select **Open** to open the file, **Save** to save it (whereupon you will be asked to specify the file name and location in which it is to be saved), or **Cancel** to cancel the export.

   If you save the file, a File Download Progress window opens.
5. On completion of the operation, if the window does not close automatically, click **Close**.

You can now open the file in MS Word, attach it to an email etc.

25.3.3. Exporting Data from an Optimized Database

Note: The export functionality and the options available in the dialogs differ depending on whether the project is set to use the Legacy or Optimized database format. This section and the sub-sections under describe the export functionality for the Optimized database format.

To export data from a project that uses the Optimized Database Format, follow the procedure detailed in this section. Note that the dialog and options for step 2 of the procedure will depend on the export format that you select in step 1.

25.3.3.1. Exporting from an Optimized Database - Step 1

To export data from a project using the Optimized database format:

1. With the project open, go to the **Survey Data > Exports** menu command.

   The first stage of the Export dialog opens.

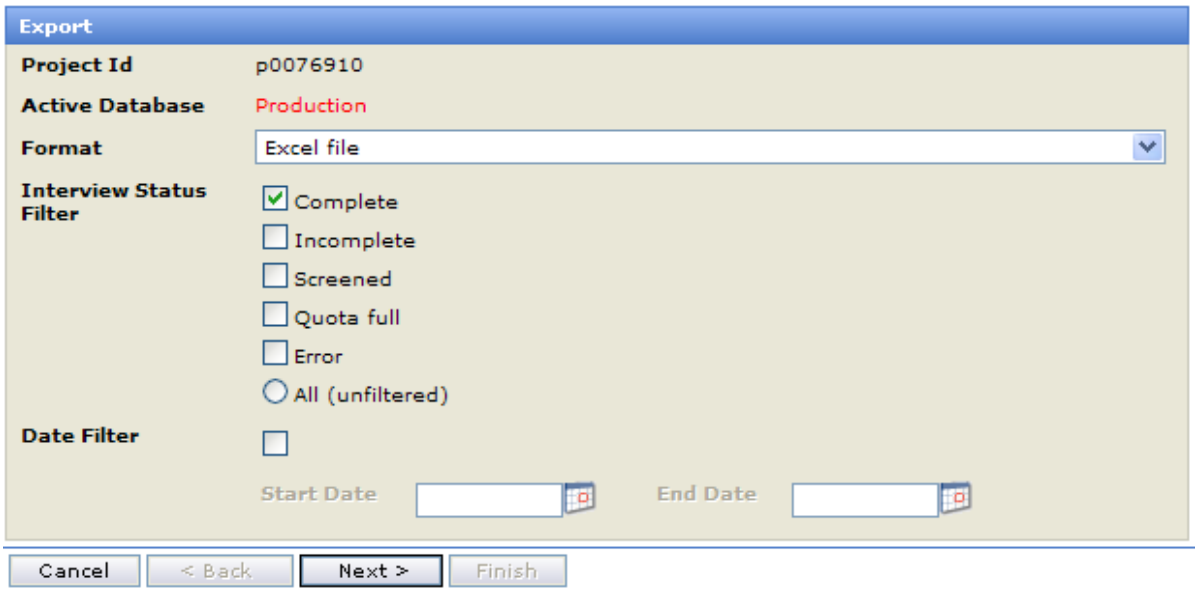


Figure 776 The first stage of the Export dialog

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.
- **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.
- **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.

2. Select the required format for the export. Note that the options available in step 2 of the dialog will depend on the format selected here.
3. Select the interview statuses that are to be included.
4. If you want to specify a date range for the data, check the Date Filter box and select the desired dates.
5. Click **Next**.

   The second stage of the Export dialog opens. Note that the options available in the dialog will depend on the export format you have selected.

- Excel
- Delimited text file
- Triple-S file

25.3.3.2. Step 2 when the Export Format is Excel

If you have selected to export to Excel in stage 1 of the dialog, then stage 2 of the dialog will appear as below.

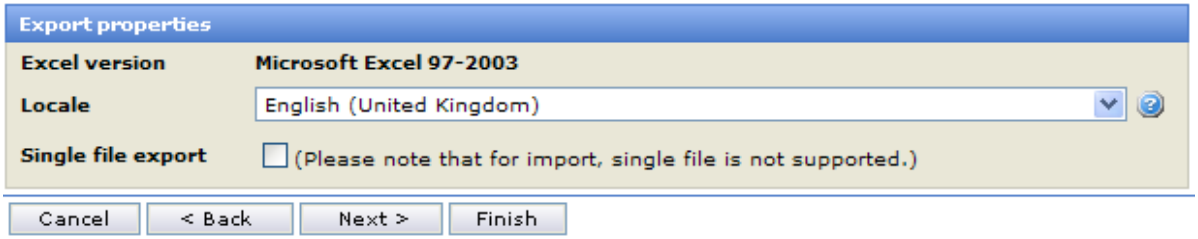


Figure 777 The second stage of the Export dialog for an Excel export

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 (go to User Settings on page 120 for more information). 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.
- **Single File Export** - 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.

  Instead of exporting loop data as separate files, you can check the Single File Export box to 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.

When you have made the appropriate selections, click **Next** to go to the third stage of the dialog.

25.3.3.3. 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, then the dialog that opens in step 2 will be as shown below.



Figure 778 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:
  - **Comma** - a Comma (,) -separated ASCII text file is generated. All answers will be inside quotes (""). The variable names will be in the first row.
  - **Tab** - a Tab-separated ASCII text file is generated. No quotes ("") are used. The variable names will be in the first row.
  - **Custom** - the Custom Delimiter field is activated. Here you can select any single keyboard character, which will then be used as the delimiter in the exported ASCII text file.
- **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.
- **Single File Export** - 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.

  Instead of exporting loop data as separate files, you can check the Single File Export box to 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.

When you have made the appropriate selections, click **Next** to go to the third stage of the dialog.

25.3.3.4. 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 (go to What is Triple-S? on page 579 for more information), then the dialog that opens in step 2 will be as shown below.

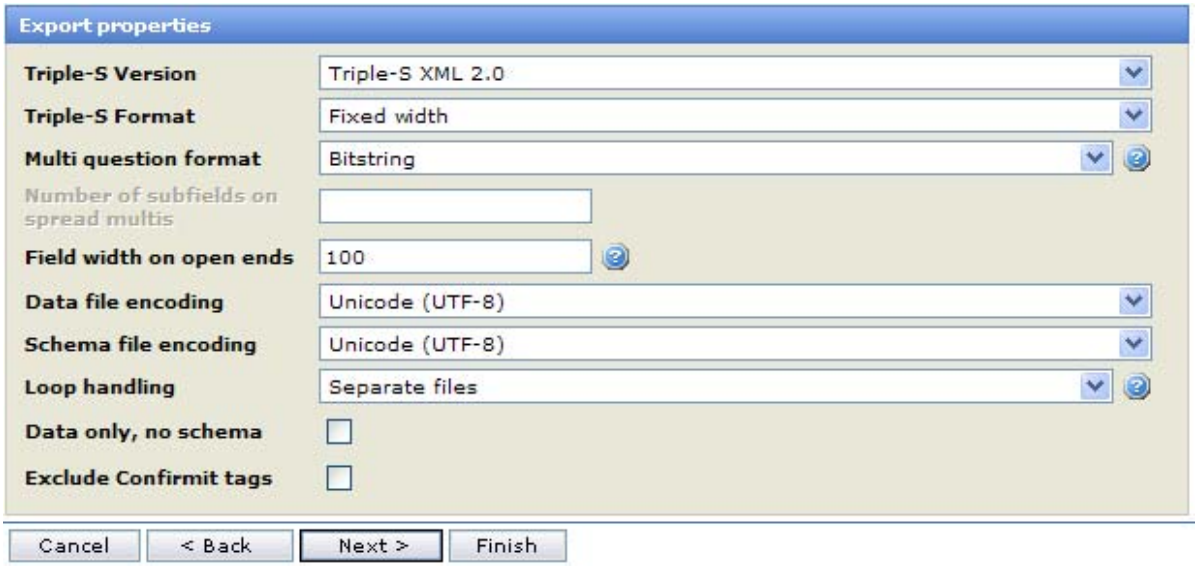


Figure 779 The second stage of the Export dialog for a Triple-S XML file export

Make the appropriate selections. The options are as follows:

- **Triple-S Version** - the Triple-S XML standard currently has three versions (go to The Triple-S Versions on page 579 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" (go to The Triple-S Versions on page 579 for more information).
- **Multi Question Format** - data for Multiples may be recorded as either one character per value in Bitstring format (go to The Bitstring Format on page 606 for more information), or as a list of values in spread format (go to The Spread Format on page 606 for more information)

  - **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.
  - **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.

- **Number of Subfields on Spread Multis** - this attribute becomes active when the Spread option is selected for the Multi Question Format. The attribute must be a positive integer, and specifies the number of subfields within the overall field that is defined by the <position> element.
- **Field width on open ends** - this field specifies the default size (number of characters) for "open ends". "Open ends" are "Open text" questions, multi questions with the open text property set and answers from "Other" text boxes in answer lists, without any field width specified in question properties. If the answer is longer than the limit, it will be truncated. However if the "Field width" of a question is set (in the Properties sheet), the generator will use that value instead of the value in "Field Width on Open Ends". These variables are exported as "character" variables in Triple-S.
- **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) and Unicode 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) and Unicode character encoding. This property defines the encoding for the schema file.
- **Loop handling** - has two options:
  - **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.
  - **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.
- **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.
- **Exclude Confirmit tags** - check the box if you wish to exclude Confirmit precode tags (go to Confirmit Tags on page 607 for more information).

When you have made the appropriate selections, click **Next** to go to the third stage of the dialog.

25.3.3.5. Exporting from an Optimized Database - Step 3

The third stage of the Export dialog opens. This dialog is common for all export formats.

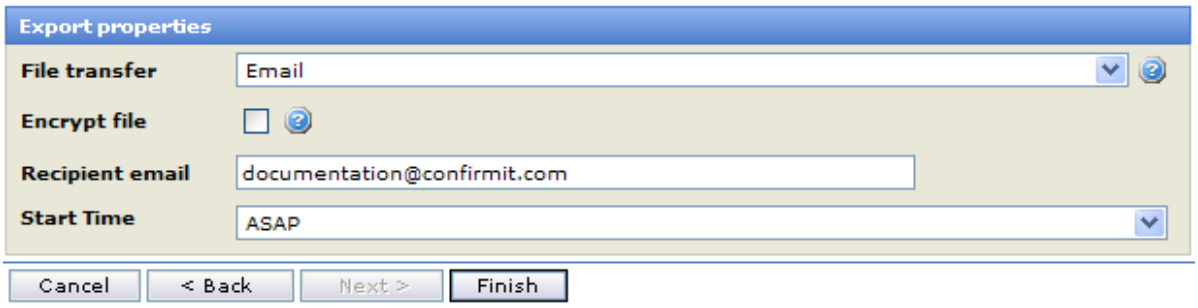


Figure 780 The third stage of the Export dialog

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 (go to The Task Properties Recurrence Tab on page 36 for more information).

When you are ready, click **Finish**.

The Rule Executer page opens, and the task will run when appropriate. Here you can see the status of the task, and select to be notified on completion if desired. You can proceed with other tasks as soon as you have clicked **Finish**.

25.3.4. Importing Data into a Legacy Database

Note: The procedures and dialogs for importing data into a project differ depending on the type of database format the project is using; Legacy or Optimized. The information in this section applies to projects using the Legacy database format.

Important:
The Legacy and Optimized database formats process data in different ways. The data produced by a project using one format will therefore not normally be compatible with a project using the other format. If you need to import data produced in one format into a project using the other, you should duplicate the project into which you wish to import the data, and launch it in the appropriate format before attempting to import the 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.

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 appended (the original data in the database will be kept). If you select “update” the response data that has a matching key field in the database of the project will be updated. Records in the import file that have no matching key field in the database will be appended 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 also can be done 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 most likely will be different than those in the import file.

To import data into a project using a Legacy database:

1. Go to the **Survey Data > Imports** menu command.

   The Data Import dialog shown below opens.

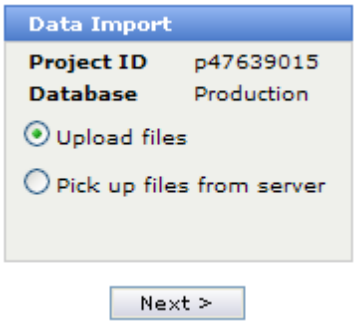


Figure 781 Example of the Data Import dialog

2. Note that the database currently selected is displayed in the dialog. If you wish to change the database, do so in the database selection field in the lower-right corner of the Confirmit window.

   You can choose between two different kinds of data import:

   - **Upload files** – immediately upload the response data file(s) from the client machine (your own computer or network) (go to Upload Files to a Legacy Database on page 568 for more information).
   - **Pick up files from server** – the import file(s) have been previously placed on a designated server area on the Confirmit server and a task is executed to pick up the file(s) from there (go to Pick up files from server on page 570 for more information).

3. Select the required import option and click **Next**.

The next step in the process will depend on the selection made above.

25.3.4.1. Upload Files to a Legacy Database

If you select **Upload Files** and click **Next**, the Import File dialog opens as shown below.

1. Choose the file by browsing or specify the path of the file, then click **Next** (go to File Names on page 571 for more information).

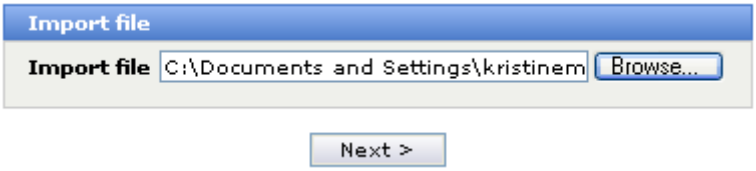


Figure 782 The Import File dialog

   The Import Properties page opens as shown below. You must now specify the "Import properties" for this import file (go to The Import Files on page 572 for more information).



Figure 783 The Import properties page

The details and fields on this page are as follows:

- **Project ID** - the current project id. The import file will be imported into this project's database.
- **Database** - the database the file will be imported to (Production or Test).
- **File Encrypted** - if the file is encrypted, check this box.
- **Import template** - choose between "All fields" or a Data transfer template defined in template editor.
- **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.

- **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 "Other", you can then define any single keyboard character.
- **Decimal symbol** - the decimal symbol that is used for numeric values. Choose between point (.) and comma (,)
- **Email** - error files and log files generated during processing of the import files will be zipped, attached to an email and sent to the specified email address.
- **Validate response** - the default value is “Yes” in the “Validate response” drop down box, meaning that the import files are validated with respect to necessary fields and legal responses. If you select “No” not all validation routines are executed. Use this with caution. You must be certain of the quality of the import files to select this option (go to Validation on page 572 for more information).

- **Start time** - Select ASAP to immediately place the task in the batch queue for execution, or "Schedule for later execution" to use the Task Manager to specify when the task should be executed.
- **Type of uploading** - If you select “Append” the new response data will be appended to the already existing data, if any. If there is a match in the key field of data in the import file and data already in the database of the project, that data will not be appended. If you select “Update” the response data that have a matching key field in the database of the project will be updated. Records in the import file that have no matching key field in the database will be appended to the database.

2. Make the appropriate settings and selections, then click **Finish**.

The Import task will be given a task ID and depending on the selected start time the task will either be carried out immediately or placed in the Task Manager for execution as soon as possible.

25.3.4.2. Pick up files from server

If you select **Pick up files from server**and click **Next**, the Import Properties dialog opens as shown below.

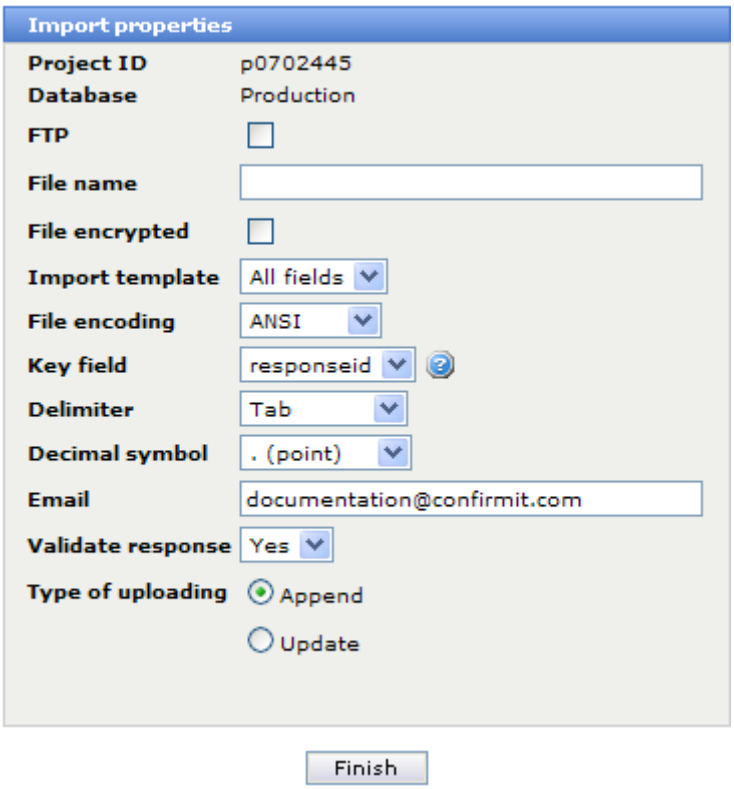


Figure 784 The Import properties page

The details and fields on this page are as follows:

- **Project ID** - the current project id. The import file will be imported to this project's database.
- **Database** - the database the file will be imported to (Production or Test).
- **FTP** - only available/displayed to users with FTP and Data Transfer Encryption (go to Data Transfer Encryption and FTP on page 2 for more information). The import files can be encrypted and uploaded from an FTP server.
- **Leave file on server** - appears if FTP is selected. Choose this property if you want the file to be kept on the FTP server after it has been uploaded into Confirmit.
- **File name** - specify the top-level filename, or the zip file to be imported. After setting the properties the file must be moved to the "SharedData" data area on the server (consult your system administrator) with the following name: taskid_<taskid>, where <taskid> is the given taskid for the task.

- **File encrypted** - only available/displayed to users with FTP and Data Transfer Encryption (go to Data Transfer Encryption and FTP on page 2 for more information). The import files can be encrypted and uploaded from an FTP server. When this setting is enabled, the import files will be encrypted.
- **Import template** - choose between "All fields" or a Data transfer template defined in template editor.
- **File encoding** - choose the encoding type for the import files: ANSI or Unicode. ANSI encoding type is recommended for the Western European encoding languages, and Unicode is recommended for data files containing data in languages that use either Unicode encoding or other encoding.
- **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.

- **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 "Other", you can then define any single keyboard character.
- **Decimal symbol** - the decimal symbol that is used for numeric values. Choose between point (.) and comma (,)
- **Email** - error files and log files generated during processing of the import files will be zipped, attached to an email and sent to the specified email address.
- **Validate response** - the default value is “Yes” in the “Validate response” drop down box, meaning that the import files are validated with respect to necessary fields and legal responses. If you select “No” not all validation routines are executed. Use this with caution. You must be certain of the quality of the import files to select this option (go to Validation on page 572 for more information).
- **Type of uploading** - If you select “Append” the new response data will be appended to the already existing data, if any. If there is a match in the key field of data in the import file and data already in the database of the project, that data will not be appended. If you select “Update” the response data that have a matching key field in the database of the project will be updated. Records in the import file that have no matching key field in the database will be appended to the database.

2. Make the appropriate settings and selections, then click **Finish**.

   The task is placed in the Task Manager with a unique task ID along with the rest of the parameters in exactly the same way as with the uploading. The only difference is that the user cannot choose to execute the task as soon as possible. A new folder is created in the “Shared Data” data area on the server (consult your system administrator) with the following name:

   tasked_<taskid>

   where <taskid> is the given taskid for the task.

Note that the import files must be put in that folder on the server before the task is set to execute, or else the task will fail.

25.3.4.3. File Names

The file names can use alphanumeric characters(0...9, a...z, A....Z) and underscore (_). They can not include blank spaces.

If the questionnaire does not contain loops, the file can have any name. If the questionnaire contains loops the response data is located in different files, one for the top level and one for each loop (such as the "separate files" loop export (go to Loops on page 555 for more information).

Important: Only specify the top-level filename (a .txt file) if this is the only file that is to be uploaded. If loop files are also to be uploaded, all the files MUST be placed in a zip file. The file containing the top-level variables (outside all loops) must have the same name as the. zip-file, and the files with the loop variables must be named <top_level_file_name>_<loopid>. For example if the name of the zip-file is data.zip, the top-level file must be named data.txt and the file containing data from the loop with loopid l1 must be named data_l1.txt.

25.3.4.4. The Import Files

The file(s) to be imported must follow the rules below:

- The import files must be delimited ASCII files. Various delimiters may be used (go to Upload Files to a Legacy Database on page 568 for more information).
- The first row must contain the variable names, and they must correspond with the variable names in Confirmit.
- The variable names must be unique, otherwise the import will be aborted.
- The contents must correspond with the precodes used in Confirmit for single and grid questions and must be 0 for not chosen and 1 for chosen for ordinary multi questions.
- As **tab** may be used as the delimiter in the file, open text fields should not include tabs.
- There is no specific code for empty fields. If you have fields you want to indicate as empty, ("null" or "System Missing"), place nothing between the delimiters.
- The files must have the same number of delimiters on each row (the same number of fields).

The question labels in Import Files are as shown below.

Question type	Label	Content
Single	The question id. (for example q1)	The precodes of the answers.
Open	The question id. (for example q1)	The text answered (or numbers if numeric property is used)
Multi	The question id + underscore + precode of the item (answer) (for example q2_1)	Ordinary multi: 0 for not chosen (false)/1 for chosen (true)With open text property: The text answered (or numbers if numeric property is used)
Grid	The question id + underscore + precode of the item (answer) (for example q2_1)	The precodes of the answers (from scale).
Other	The question id + underscore + precode of the corresponding item in the answer list + underscore + "other" (for example q3_2_other)	The text answered.

25.3.4.5. Validation

When Validation is selected, the following validation is performed on the import files. Rows not matching these requirements will not be imported, but will be sent by mail in a error file together with a log with the error messages:

- The specified key field for every row must exist in all of the files that are imported.
- Precodes must compare to precodes defined in the answer list or scale of the question.
- Ordinary multi questions must have values 0 or 1 or be empty.
- Ordered multis must have integers greater than 0.
- Open text questions with field width defined must not have more characters than the limit.
- Numeric open text questions must meet the requirements set in the properties of the question (precision, scale and lower and upper limit) and if it is a decimal number and contains a comma, then this must be the defined decimal symbol (',' or '.').

- If "status" is included in the import file, it must be one of the following: ‘complete’, ‘screened’, ‘aborted’ or ‘error’. (If status is not included in the import file, status is automatically set to 'complete').
- If the 'responseid’ field is included, the input must be an integer larger than 0.
- If the ‘respid’ field is included, the input must be an integer larger than 0.
- If the ‘interview_start’ or 'interview_end' fields are included, the input values must be in the format 'YYYY-MM-DD HH:MM:SS'.
- Duplicate key values are not allowed.
- The last column in the upload file must contain data in all rows.

25.3.5. Importing Data into an Optimized Database

Note: The procedures and dialogs for importing data into a project differ depending on the type of database format the project is using; Legacy or Optimized. The information in this section applies to projects using the Optimized database format.

Important:
The Legacy and Optimized database formats process data in different ways. The data produced by a project using one format will therefore not normally be compatible with a project using the other format. If you need to import data produced in one format into a project using the other, you should duplicate the project into which you wish to import the data, and launch it in the appropriate format before attempting to import the data.

To import data into a project that uses the Optimized Database Format, follow the procedure detailed in this section. 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.

25.3.5.1. Importing to an Optimized Database - Step 1

To import a file into a project using the Optimized database format:

1. Go to the **Survey Data > Imports** menu command.

   The Data Import dialog opens.

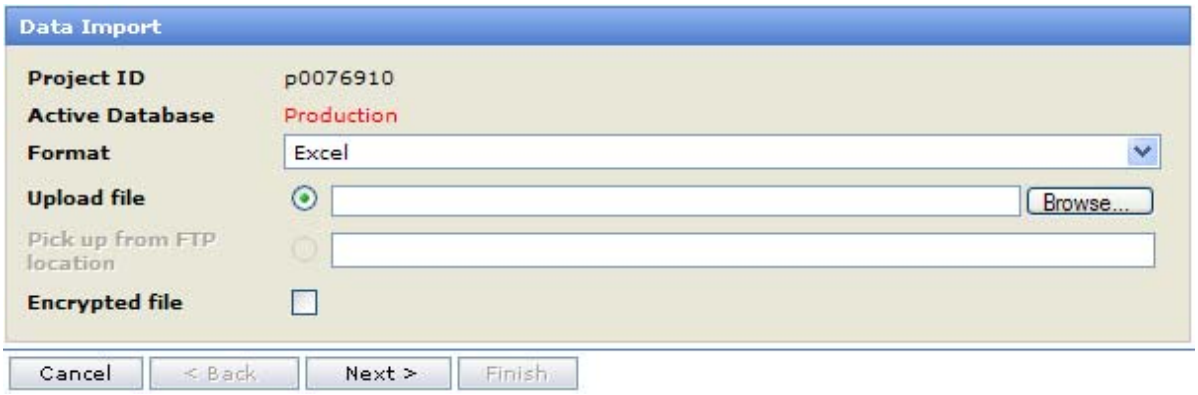


Figure 785 The Data Import dialog

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.
- **Encrypted file** - data transfer encryption functionality makes it possible to perform secure data exports from Confirmit. The person exporting the file will need to encrypt it using your public PGP key (go to Exporting from an Optimized Database - Step 3 on page 566 for more information), and you must then use your private PGP encryption key to decrypt the file. Check this box if you know the file you wish to upload is encrypted.

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.

Excel

Delimited text file

Triple-S

25.3.5.2. 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.

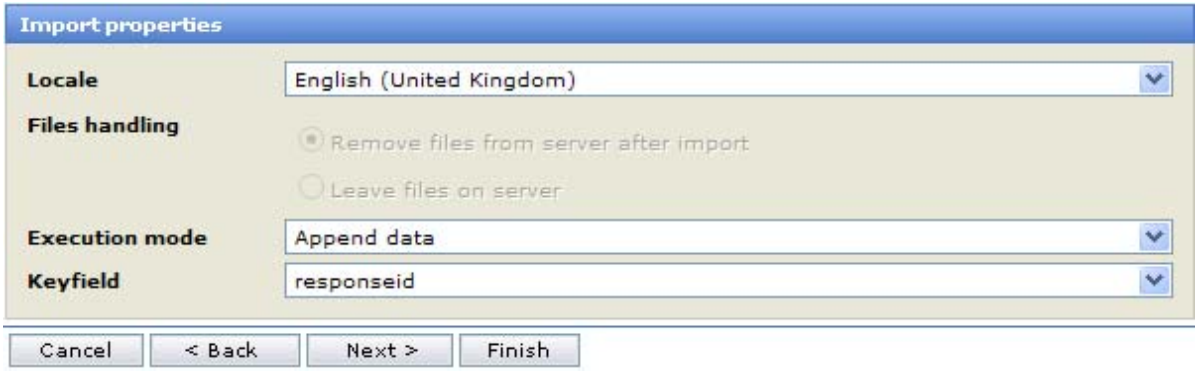


Figure 786 The second stage of the Import dialog, for an Excel import

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.
- **File handling** - select whether you wish to copy the file from the server/FTP site or move it (delete it from the site).
- **Execution mode** - if you select “Append data” the new response data will be added to the already existing data, if any. If there is a match in the key fields of the data in the import file and data already in the project database, that data will not be added. If you select “Update data” any imported response data that has a matching key field in the project database will be updated. Records in the import file that have no matching key field in the database will be added to the database.

- **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.

Make the appropriate selections, then click **Next** to move to the next step in the procedure.

25.3.5.3. 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.

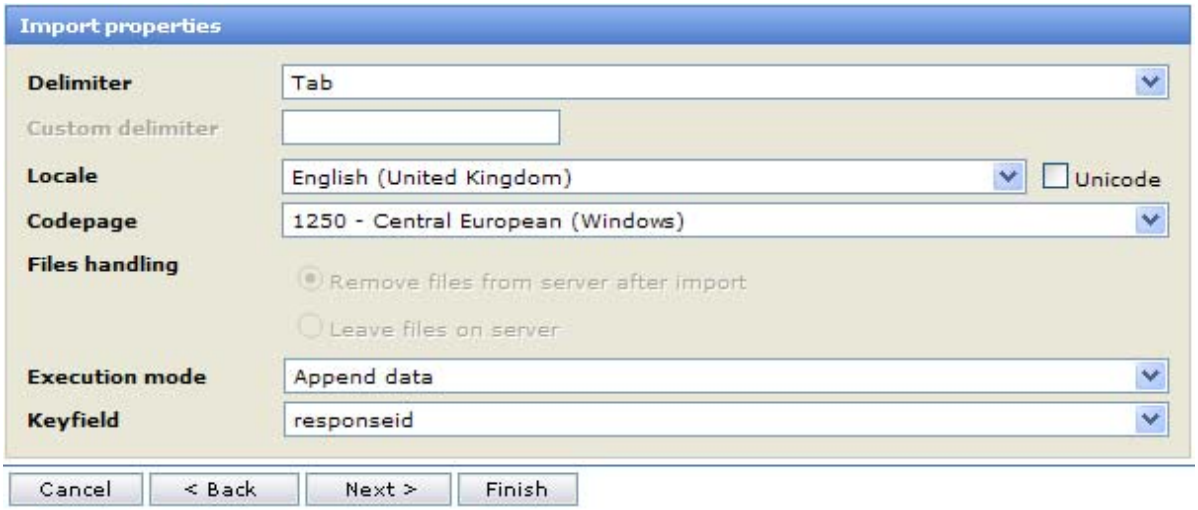


Figure 787 The second stage of the Export dialog for a Delimited Text File import

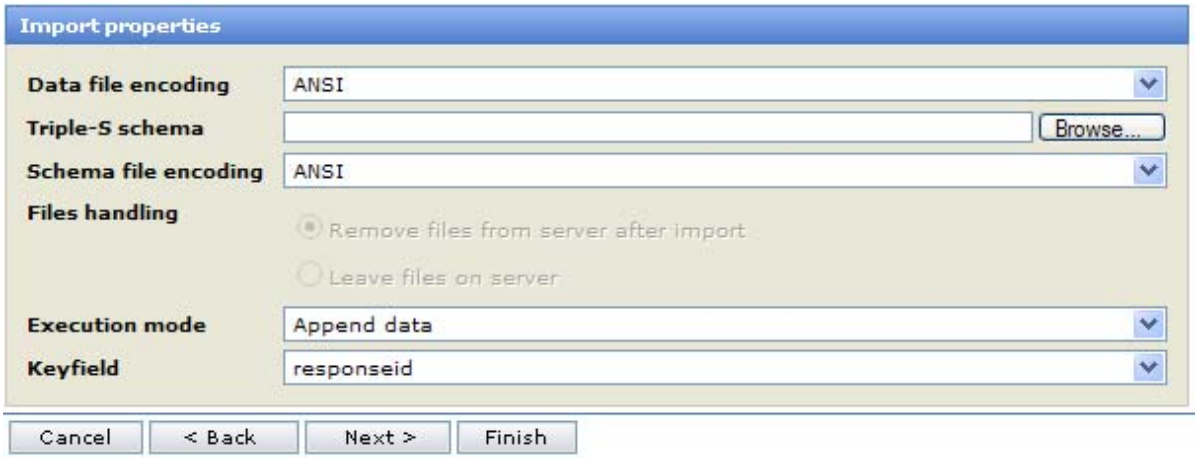
The options are as follows:

- **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** - (go to Unicode Translator in Script Nodes on page 287 for more information)
- **Codepage** - if Unicode is not selected, choose a code page from the drop-down list.
- **File handling** - select whether you wish to copy the file from the server/FTP site or move it (import it and delete it from the site).
- **Execution mode** - if you select “Append data” the new response data will be added to the already existing data, if any. If there is a match in the key fields of the data in the import file and data already in the project database, that data will not be added. If you select “Update data” any imported response data that has a matching key field in the project database will be updated. Records in the import file that have no matching key field in the database will be added to the database.
- **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.

Make the appropriate selections, then click **Next** to move to the next step in the procedure.

25.3.5.4. 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.
- **File handling** - select whether you wish to copy the file from the server/FTP site or move it (import it and delete it from the site).
- **Execution mode** - if you select “Append data” the new response data will be added to the already existing data, if any. If there is a match in the key fields of the data in the import file and data already in the project database, that data will not be added. If you select “Update data”, any imported response data that has a matching key field in the project database will be updated. Records in the import file that have no matching key field in the database will be added to the database.
- **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.

Make the appropriate selections, then click **Next** to move to the next step in the procedure.

25.3.5.5. Importing to an Optimized Database - Step 3

The third stage of the Import Properties dialog opens as shown. This dialog is common for all import formats.

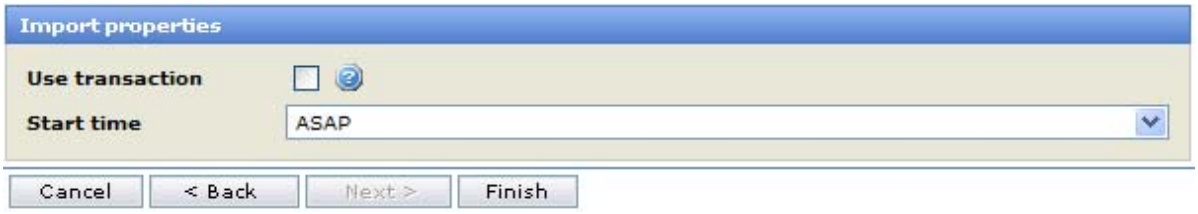


Figure 788 The third stage of the Import Properties dialog

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 (go to The Task Properties Recurrence Tab on page 36 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.

26. The Data Processing Module

The Data Processing module provides processing functionality to improve data imports, data cleaning (recoding and transformation) and data exports. The module uses Rules, set up by the user, to direct the flow of information, and the system handles data much faster than "standard" import and export functionality. Note that the module functions are not associated with any particular project - you do not enter a project first - so you can work with multiple projects.

Important: The Triple-S functionality is intended for importing and exporting data unrestricted by project ownership. The user permission for this functionality is therefore "company-wide"; i.e. all users attached to a company will have full read and editing access to all Triple-S templates, rules and rule lists associated with that company. Be therefore extremely careful when editing templates and rules - if you change a rule that is being used by another user, valuable project data may be lost when that user runs the changed rule.

Note that if a user attempts to run a rule that is attached to a project to which the user does not have access, then the rule will abort with an error message.

Access the module functionality via the Data Processing menu command.

26.1. Introduction

The Data Processing module is built on the SQL Server Integration Services (SSIS) architecture. The module consists of:

- Data Sources.
- Action Script (Data cleaning / recoding / transformation).
- Data Targets (destinations).

The module uses the Triple-S Survey Data Interchange standard (go to What is Triple-S? on page 579 for more information).

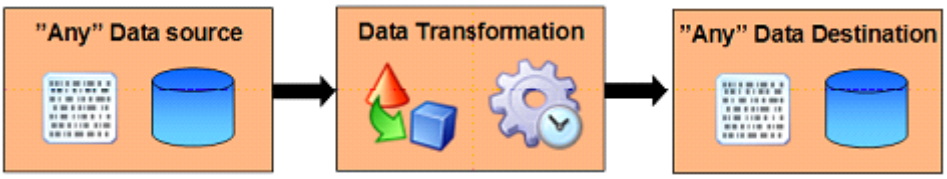


Figure 789 The basic data processing flow

Data Processing supports the following sources and targets:

Sources:

- Triple-S XML (version 1.1, 1.2, 2.0)
- Confirmit Survey (one or multiple surveys)

Targets (destinations)

- Triple-S XML (version 1.1, 1.2, 2.0)
- Confirmit Survey (one survey only)

Action Script (data transformation)

- JScript.NET

  The action script allows you to modify the values of the columns provided by the source. This means that the columns read by the source can be altered by the action script, and passed into the destination.

Note: The action script cannot introduce new columns into the database.

26.1.1. What is Triple-S?

Triple-S is a public Survey Data Interchange standard, designed and published by the Triple-S Group.

Triple-S is a language for describing survey metadata - that is, data about the survey data: the question and response texts, the location of individual data items within the record, valid ranges for responses, and so on. The Triple-S standard defines a means by which both survey data and variables may be transferred between different survey programs running on different software and hardware platforms. If one program can translate into Triple-S format, and another program can translate from Triple-S format, then the survey metadata can be translated from one language program to the other automatically, without the need for a programmer to do the job manually.

A Triple-S survey is described in two text files. One, the Metadata File, contains version and general information about the survey together with definitions of the survey variables. This is used to interpret the contents of the Data File. The Metadata File will normally have the file extension of 'xml' (or 'sss' for compatibility with previous versions of the standard) and the corresponding Data File will have the same name but with the extension 'asc'.

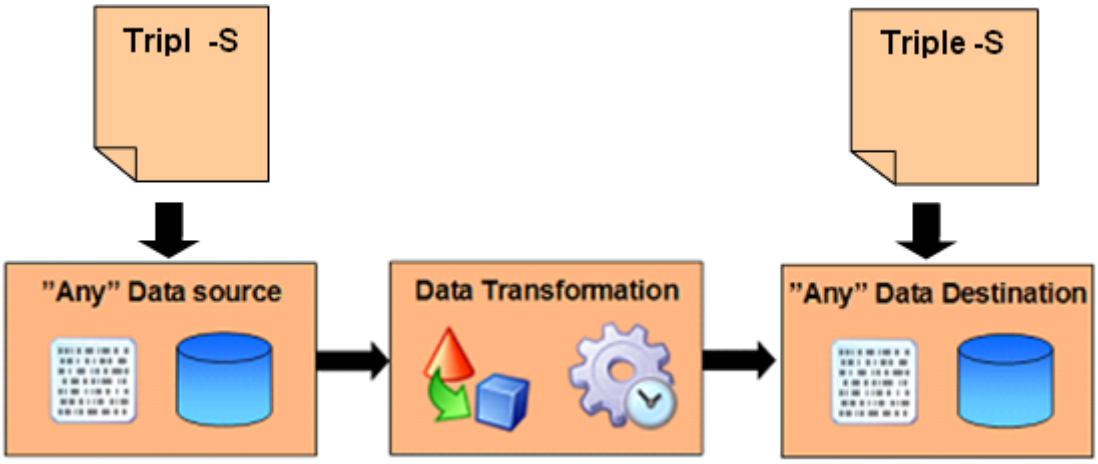


Figure 790 The processing flow

The Triple-S format is used consistently in Confirmit Data Processing to define templates (schemas) for sources and destinations.

For further detailed information about the Triple-S format, refer to the website www.triple-s.org.

26.1.2. The Triple-S Versions

The Triple-S XML standard currently has three versions as follows:

- Triple-S XML 1.1 - Hierarchies and comma-separated variable files are not supported.
- Triple-S XML 1.2 - Hierarchies and comma-separated variable files are not supported.
- Triple-S XML 2.0 - Supports comma-separated variables (CSV). Supports hierarchy for loops (separate files). Note that for projects with loops, hierarchy is supported for both import and export.

For further details on the formats and functionality available in the three versions, go to the Triple-S website at www.triple-s.org.

26.2. The Data Processing Menu

The Data Processing menu appears in the main menu bar. This has two methods of access:

- Click on the menu command to go to the orange sub-menu bar.
- Click on the down-arrow beside the command to open the drop-down menu, as shown below.

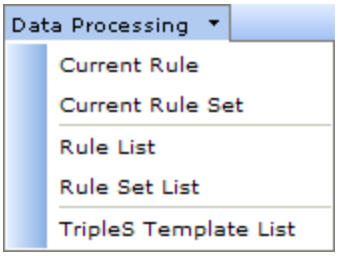


Figure 791 The Data Processing menu

26.2.1. Triple-S Template List

A Triple-S Template is a definition of meta-data connected to a data file. The template defines what data is included, where the data is, the type of questions, the question texts and the answer lists.

The Triple-S Template List lists the Triple-S templates currently available to you. When you select this menu command, the page opens as shown below.

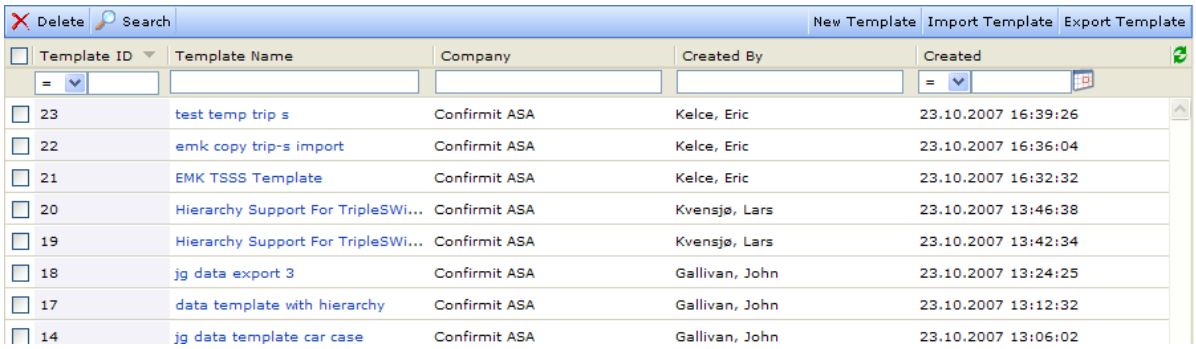


Figure 792 Example of the Triple-S Template List

On this page you can create new Triple-S templates, import templates that have been created in other projects/servers, and export templates. Left-click on a Template Name link in the list to open a drop-down menu. The items in this menu enable you to export or replace the selected template, and allocate to other users access permissions to the template. The Permissions list that opens is identical to that in the **Current Rule > Permissions** tab (go to The Permissions Tab on page 594 for more information).

26.2.1.1. How to Create a New Triple-S Template

1. When in the Triple-S Template list, click **New Template**.

   The New Template page opens as shown below.

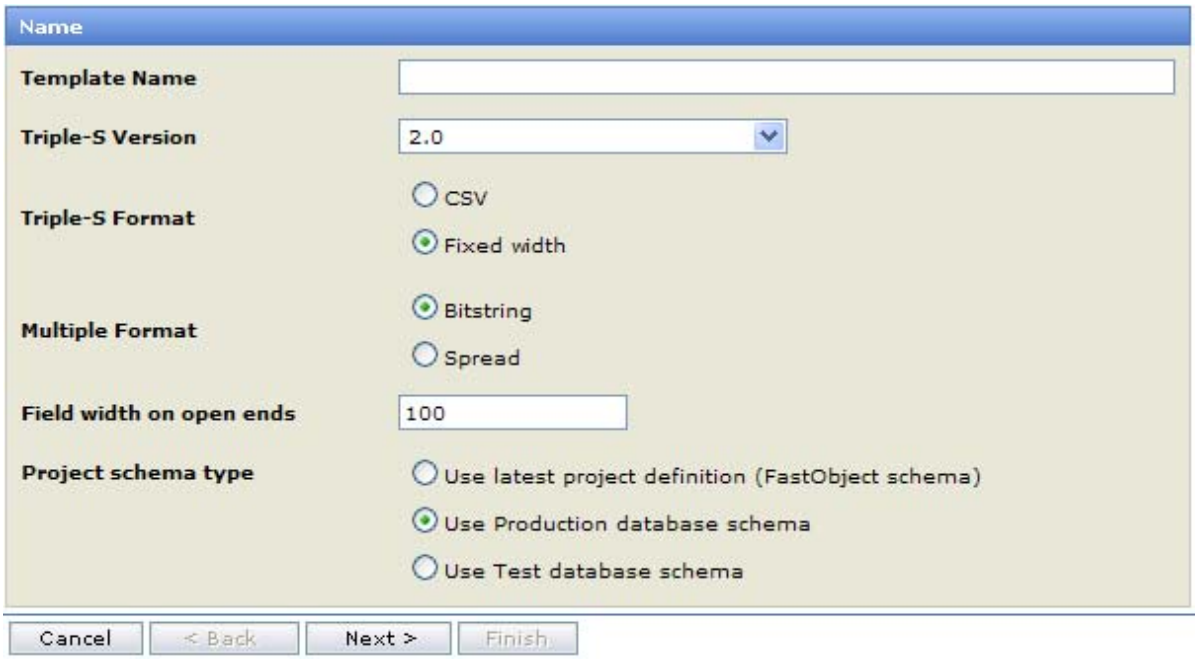


Figure 793 The New Triple-S Template page

2. Type a name for your new template into the Template Name field.
3. In the Triple-S Version field, select the version you wish to use.

   Note that different versions allow different formats to be used. All three versions support "Fixed width", only version 2.0 supports "Comma-separated variables" (go to The Triple-S Versions on page 579 for more information).
4. Select the Triple-S Format (the options available depend on the version that you have selected above).
5. Select the required Multiple Format.

   Data for Multiples may be recorded as either one character per value in Bitstring format (go to The Bitstring Format on page 606 for more information), or as a list of values in spread format (go to The Spread Format on page 606 for more information).
6. Type a value for the field width (default is 100).

   This field specifies the default size of all Triple-S variables that have the type “character”. This size is the number of characters that a “character” variable will hold in each data row in the Triple-S data file. The Triple-S template generator uses this value to set the size for “Open text” nodes and the answers that are set as “Other” in other types of node. If the value is set to 100, then in the data file, the data of this variable will hold 100 characters. If the answer value length is longer than 100, it will be truncated to 100 characters. However if the “Field width” of a question is set (in the Properties sheet), the generator will use that value instead of the value in “Field Width on Open Ends”.
7. Select the Project Schema Type to be used.
8. Click **Next**.

   A list of projects opens.
9. Select the project you wish to use (if the list is extensive you can use the search facility to find the desired project) and click **Next**.

   The Select Template Type dialog opens.

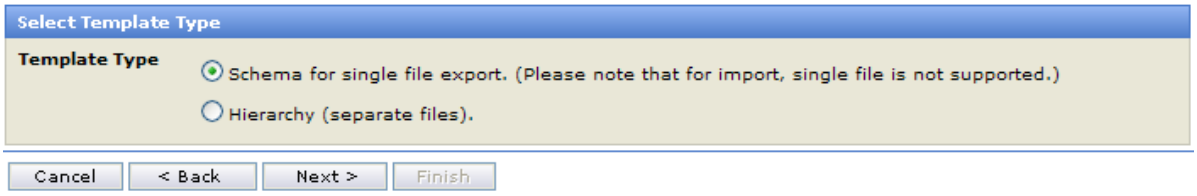


Figure 794 The Select Template Type dialog

10. Choose the type of template you wish to use, then click **Next**.

    The Choose Questions page opens as shown below. Here you select the variables that are to be included in the template. Note that there is a maximum limit to the number of variables you can select. This limit is set in the server, so for On-Premise users it can be adjusted by the server administrator.

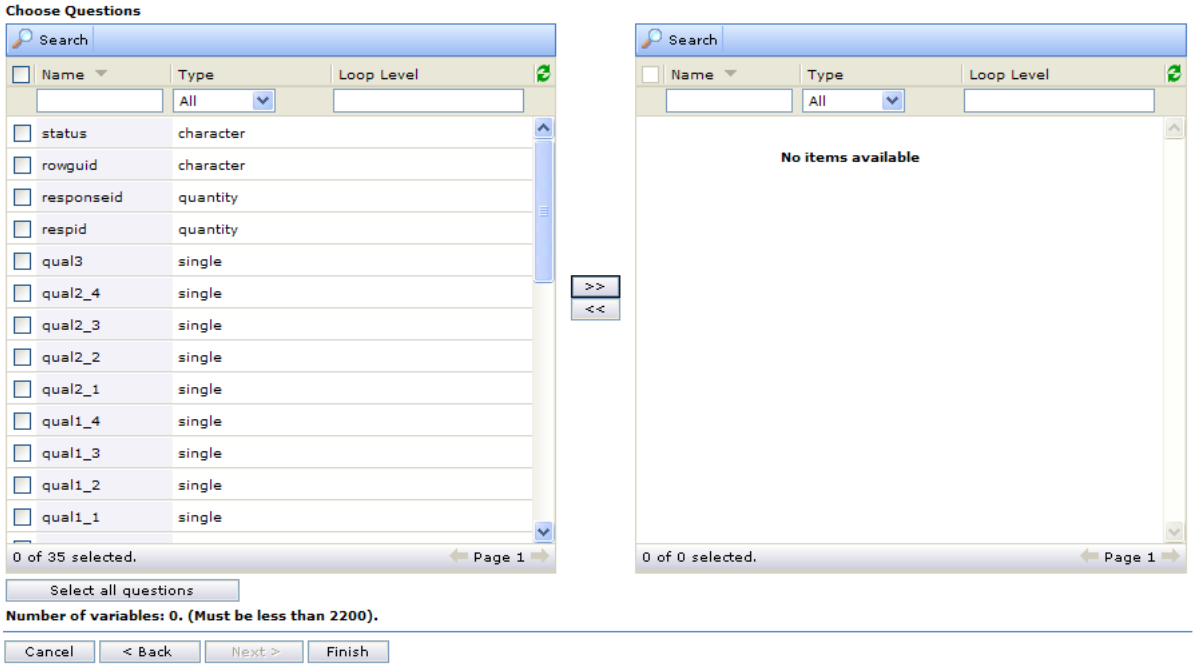


Figure 795 Example of the Choose Questions page

11. In the left column, click in the boxes beside the questions you wish to use, then click the **>>** button to move the selected questions to the right column.

If the project contains one or more loops and you selected "Schema for single file export/import" in step 9 of this procedure, then there will be an additional page in the procedure. In this case click "Next". Otherwise, "Next" will be inactive, so click "Finish" and go directly to step 12 in this procedure.

The Choose Loop Iterators page opens. Here you can select the loop iterations you wish to include or exclude (select the appropriate radio button below the lists). Note that there is a maximum limit to the number of iterations you can select. This limit is set in the server, so for On-Premise users it can be adjusted by the server administrator.

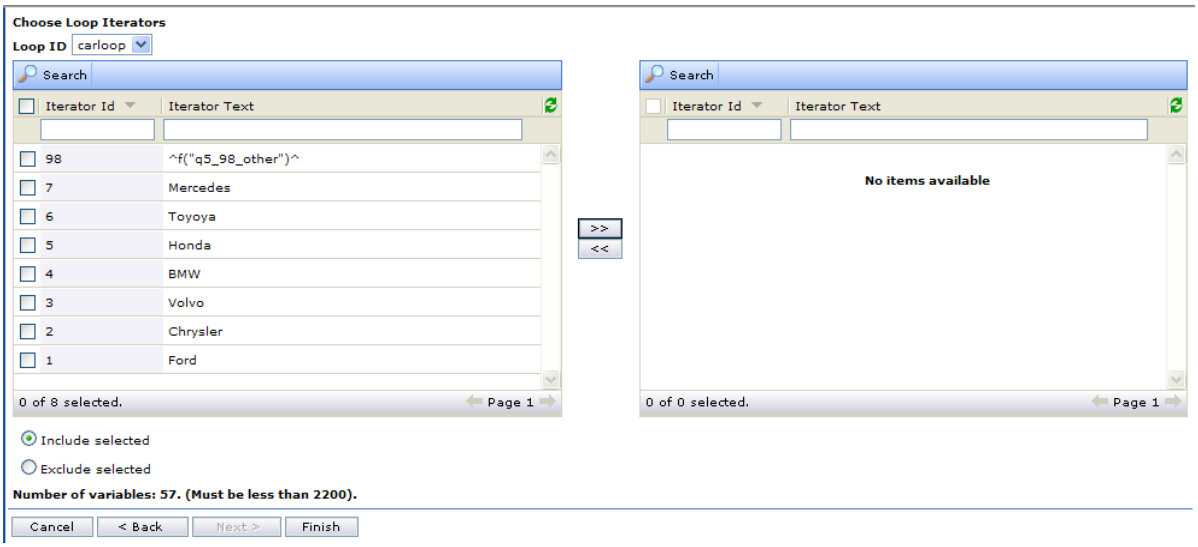


Figure 796 Example of the Choose Loop Iterators page

12. In the left column, click in the boxes beside the loop iterations you wish to use, then click the **>>** button to move the selected iterations to the right column.
13. On completion, click **Finish.**

    A Task page opens detailing the process and the task status. When the task has run, the status changes to Completed and the **OK** button appears.
14. Click **OK** to return to the Triple-S Template List.

    The new template is added to the list, its location depending on how the list is currently sorted.

26.2.1.2. How to Import a Triple-S Template

If a Triple-S Template has been exported from a server and sent to you (by email), you can import that template into your current server. To do so:

1. Open the email and save the attached .zip file into a suitable folder on your network.
2. In the Confirmit Triple-S Template List page, click the **Import Template** button located towards the right end of the page toolbar.

   The Import Triple-S Template dialog opens.

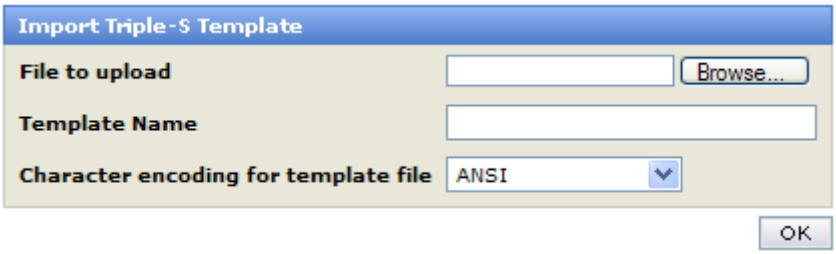


Figure 797 The Import Triple-S Template dialog

3. Click on the **Browse** button to open a standard File Select window, and find and select the template file you wish to import.
4. Type into the Template Name field the name you wish to give to the template you are importing.
5. Select the appropriate character encoding for the imported template file.
6. Click **OK**.

A Task page opens with a progress bar, a list of the processes and the current status. When the import task is completed, click **OK** to close the task page and return to the template list. The imported template is now included in the list, its location depending on how the list is sorted. You can now use the template when importing and exporting survey data.

26.2.1.3. How to Export a Triple-S Template

1. In the Triple-S Template List page, either:

   Select the template you wish to export by clicking in the box beside it, then click the **Export Template** button located towards the right end of the page toolbar.

   Or

   Click on the template in the list and then select **Export** from the pop-up menu that opens.

   The Export Triple-S Template dialog opens.

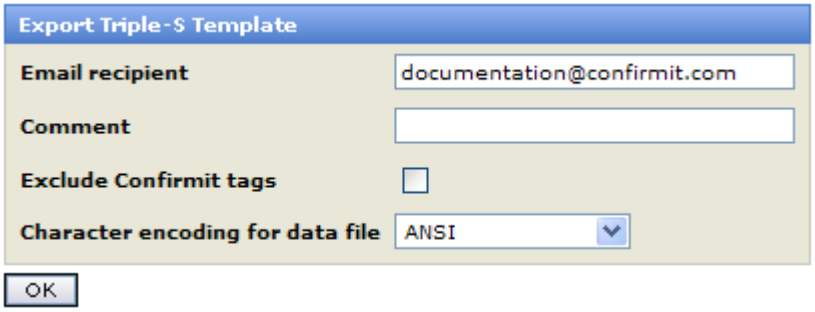


Figure 798 The Export Triple-S Template dialog

2. Check / edit the email address to which the rule is to be sent, and add a comment, as necessary.
3. Check the Exclude Confirmit Tags box if required (go to Confirmit Tags on page 607 for more information).
4. Select the appropriate character encoding for the exported template file.
5. Click **OK**.

A Task page opens with a progress bar, a list of the processes and the current status. An email is sent to the specified address with the template attached. This template must now be imported into the destination server (go to How to Import a Triple-S Template on page 583 for more information)

26.2.1.4. How to Replace a Triple-S Template

You can import a Triple-S template, over-writing an existing template in the process. This may be useful for example if you are to make changes to a template that is in use and wish to check that the changed template functions correctly before making it available to the users. In this case you can export the template to yourself in the normal manner, edit it of-line, then re-import it using the Replace procedure. Proceed as follows:

1. Have the "new" template available on your network.
2. In the Triple-S Template List, click on the template you wish to replace, and select **Replace** from the drop-down menu.

   The Replace Triple-S Template dialog opens.

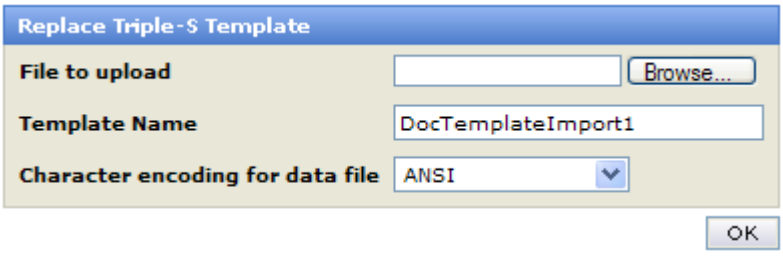


Figure 799 The Replace Triple-S Template dialog

3. Browse to and select the template you wish to import.
4. If you wish to change the name of the template, type the new name into the Template Name field.
5. Select the appropriate character encoding for the template file.
6. Click **OK**.

   A Task page opens, showing the progress of the import task.
7. When the task has completed, click **OK** to close the window.

   The template you selected to be replaced is updated.

26.2.1.4.1. Mapping Confirmit Variables

The table below outlines how Confirmit variable types are mapped to Triple-S variable types.

System fields	
respid,responseid	quantity
rowguid	character
status	character
dates (interview_start, interview_end, last_touched, lastcomplete)	Will be split into pairs of date + time variables, e.g. interview_start (for date) and interview_start_time (for time).
Question types	
single	single
multi	multiple
open text	character
open text numeric	quantity
grid	Will be split into a set of single variables, one for each element in the answer list.
loop	(In 2.0 hierarchy export) single
multi open text	Will be split into a set of character variables, one for each element in the answer list.
multi numeric	Will be split into a set of quantity variables, one for each element in the answer list
multi ranking	Will be split into a set of quantity variables, one for each element in the answer list
other, specify fields	character

26.2.2. Current Rule

Rules are used to change data and move/copy it from one place to another. For example you can use rules to update the database.

The Current Rule page shows the details of the rule selected in the Rule List (go to Rule List on page 601 for more information). When you select a rule in the Rule List, the Current Rule page opens at the General tab.

The following buttons are common for all the tabs in the page:

- **Back –** takes you back to the Rule list
- **Save –** saves any changes made.
- **Duplicate –** makes a duplicate copy of the rule. Use this if you need to make a rule that will be similar to an existing rule. You can then edit the copy.
- **Execute –** once you have set up the rule and are sure it is correct, click this button to run the rule.
- **Validate Action Script –** checks the script created in the Action tab to ensure there are no errors.
- **Export Rule –** exports the rule so it can be imported into a different server.

26.2.2.1. The General Tab

The **Current Rule > General** tab shows the details of the currently selected rule. Here you can change the rule's name, write in a comment and specify the Status and Validation setting. The remaining information cannot be edited.

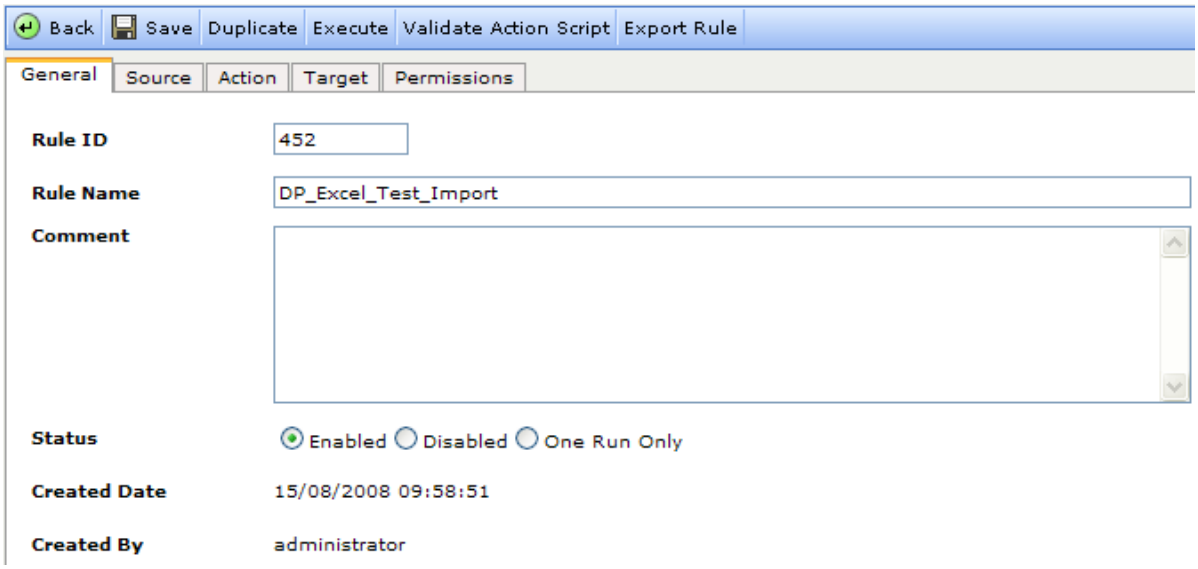


Figure 800 Example of the Current Rule > General tab

The properties are as follows:

- **Status –** select the required status for the rule. The options are:
  - **Enabled –** select to allow the rule to be run "as required". This is the default setting.
  - **Disabled –** select this option if you wish to prevent the rule from being run. This could be useful if you have a recurring task, and wish to stop using this rule in that task for a period but do not wish to change the task permanently.
  - **One Run Only –** select to specify that the rule is to be run only once.
- **Created Date** - the date the rule was created.
- **Created By** - the user name of the person who created the rule.

Important:
If you select "Confirmit Survey Data", and "Columns" or "Triple-S Template" in the Columns options, in both the Source and Target tabs, then Validation Setting options (as shown in the figure below) will also become available on the General tab (go to Validation Rules on page 604 for more information). If you wish to override the standard validation of consistency between source and target templates, you should return to the General tab after making your settings in the Source and Target tabs.

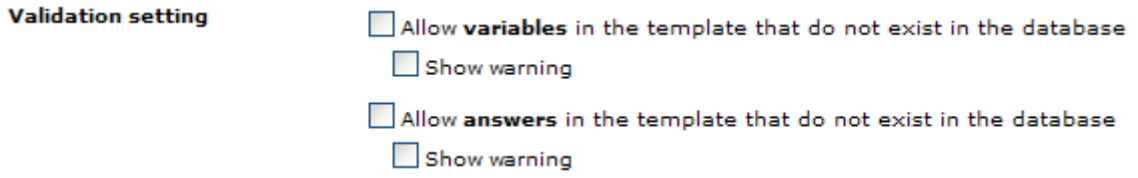


Figure 801 The Validation Setting options

26.2.2.1.1. How to Duplicate a Rule

To save time while creating a new rule, if you have an existing rule that is similar to the rule you intend to create, then you can duplicate it.

1. In the Rule List, click on the rule you wish to duplicate, to select it.

   The Rule Details page opens.

2. Click **Duplicate**.

   The Duplicate Panel Rule dialog opens.

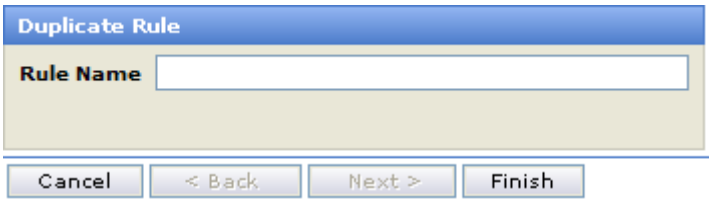


Figure 802 The Duplicate Rule dialog

3. Type in a name for the new rule, then click **Finish**.

   The rule is duplicated, and will appear in the Rules list. The Rule Details page opens showing the new duplicate rule, and you can now edit the new rule as required.

26.2.2.1.2. How to Execute a Rule

Run the rule to perform the specified changes etc.

1. In the Current Rule page, click **Execute**.

   The Rule Execution Properties dialog opens.

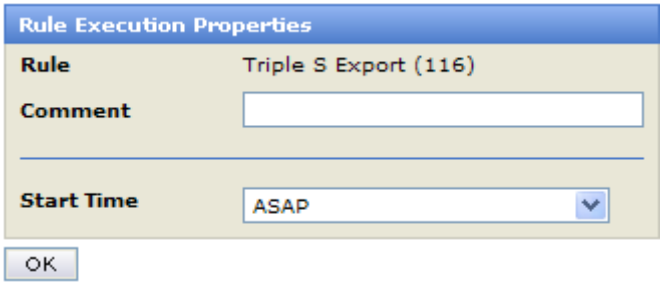


Figure 803 The Rule Execution Properties dialog

2. Type any comments into the Comment field.
3. In the Start Time field, select when you want the task to be run.

   Select ASAP to run the job as soon as it gets to the front of the task queue in the server. Select Schedule for Later Execution if you want the job to be run at a specific time in the future or if you want the job to be repeated at regular intervals.
4. Click **OK**.

   If you have specified that the task is to run as soon as possible (ASAP) then a Task page opens showing a progress bar, the Task ID and the sequences being run and completed.

   If you have specified that the task is to be scheduled for later execution, then a Recurrence Pattern dialog opens (go to The Task Properties Recurrence Tab on page 36 for more information).

   On completion, the text Task Completed is displayed at the bottom of the sequence list.
5. Click **OK** to close the Task page and return to the Rule Details page.

26.2.2.1.3. Validating an Action Script

Click to check the script for compilation errors. If errors are found, they will be listed in a separate window. You must then correct the errors and validate again. If no errors are found, a message is given.

Click the red X button in the upper-right corner of the window to close the window and return to the Rule Details page.

26.2.2.1.4. How to Export a Rule

You can export rules to other servers. Proceed as follows:

1. In the Rule Details page, save the rule to ensure all changes/updates are included.
2. Click **Export Rule**.

The Export Rule dialog opens.

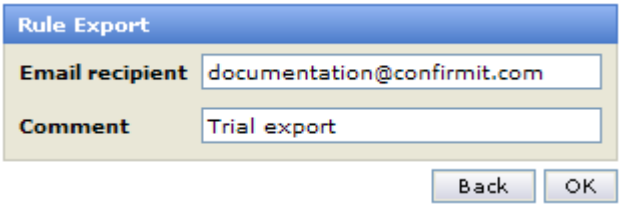


Figure 804 The Rule Export dialog

3. Check / edit the email address to which the rule is to be sent, and add a comment, as necessary.
4. Click **OK**.

An email is sent to the specified address with the rule attached. This rule must now be imported into the destination server (go to How to Import a Rule on page 602 for more information).

26.2.2.2. The Source Tab

Use the fields on this tab to specify the data source on which the rule is to operate. The data to be moved or changed can come from a number of sources – select the Source Type, the screen layout thereafter depends on the Source Type selected.

26.2.2.2.1. Source Type > File

Select this option if the data source is a file. The Source tab layout is then as shown below.

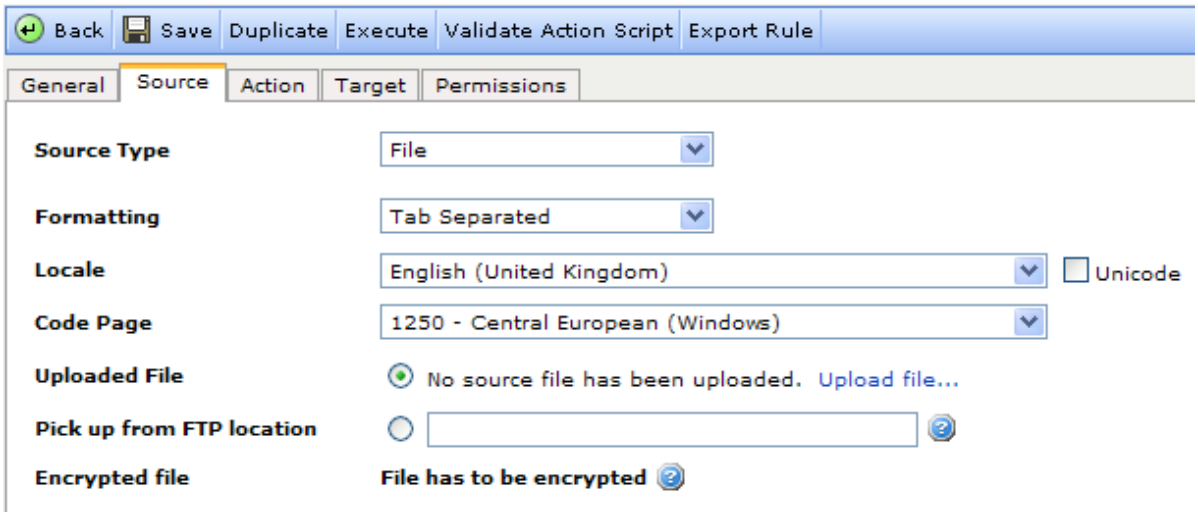


Figure 805 The Source tab with File selected as the Source Type

The properties are as follows:

- **Formatting –** Select comma-separated or tab-separated as required.
- **Locale –** specify the area or country in which the data in the file is to be used. This will allow the system to format fields such as date fields according to local standards.

Note: On a later import of the file, the Locale setting made on the Target tab (go to Target Type > File for more information) must match the setting made here.

- **Unicode –** check this box if the file is saved as Unicode. The Code Page property is then disabled.
- **Code Page –** select the code used in the file.
- **Uploaded File** - import files can either be uploaded directly in the browser, or placed on an FTP server and retrieved from there (see below). Select the required option.

- **Pick up from FTP Location** - if your company has licensed the FTP add-on and it has been enabled (go to Data Transfer Encryption and FTP on page 2 for more information), 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, so you must add only the file name to this field. Note that fetching from FTP can allow automation of data flows, since you can set up the system to pick up files automatically.
- **Encrypted File** - if your company has licensed the Encryption add-on and it has been enabled, the data transfer encryption functionality makes it possible to perform secure data transfers in Confirmit. If the source file has been encrypted by the sender using your PGP public key, you will need to decrypt the files using your private key. Note that an administrator setting makes it possible to force every Confirmit user within a company to use encryption and FTP server during data transfer.

1. Make the required selections and save them.
2. Select the **Uploaded File** or **Pick up from FTP Location** radio button as appropriate.
3. Depending on which button you have selected, click the **Upload File** link or type the file name into the FTP field.

   If you have clicked **Upload File**, a standard Windows File Upload dialog opens.
4. In which case, browse to and select the file to be uploaded (ensure it is of the correct type as selected in Formatting above).

   The name of the selected file is displayed alongside the **Uploaded File** button.
5. Click **Save** to save the changes.

26.2.2.2.2. Source Type Triple-S Data

Select this option if the data source is to be Triple-S data (go to What is Triple-S? on page 579 for more information). The Source tab layout is then as shown below:

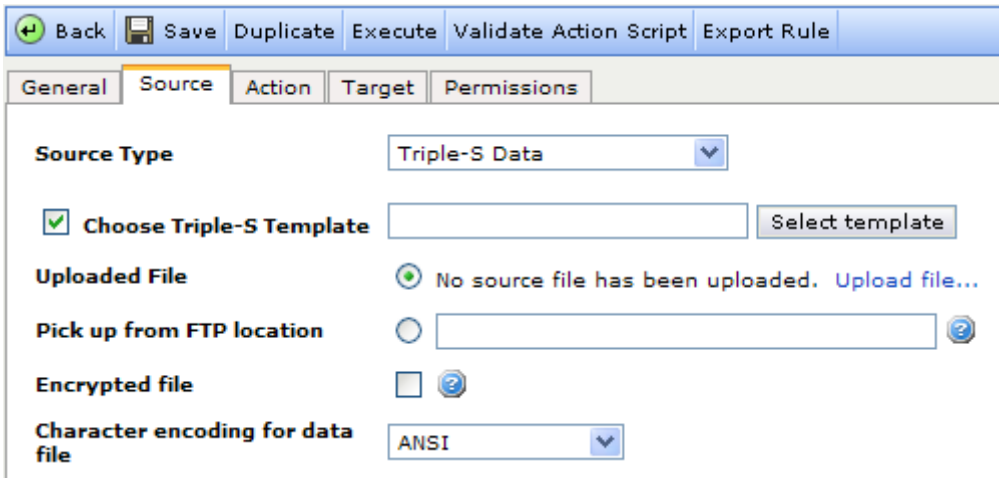


Figure 806 The Source tab with Triple-S Data selected as the Source Type

The options and properties are as follows:

- **Choose Triple-S Template** - if desired, check the box then select the appropriate template from the Triple-S Template List. If you do not select this option, then the schema definition (XML) must be included in the uploaded zip file.
- **Uploaded File** - import files can either be uploaded directly in the browser, or placed on an FTP server and retrieved from there (see below). Select the required option. If Uploaded File is selected, click **Upload File** to proceed with the upload operation. If no file has been uploaded, the message as shown in the figure above is displayed

- **Pick up from FTP Location** - if your company has licensed the FTP add-on and it has been enabled (go to Data Transfer Encryption and FTP on page 2 for more information), 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, so you must add only the file name to this field. Note that fetching from FTP can allow automation of data flows, since you can set up the system to pick up files automatically.
- **Encrypted File** - if your company has licensed the Encryption add-on and it has been enabled, the data transfer encryption functionality makes it possible to perform secure data transfers in Confirmit. If the source file has been encrypted by the sender using your PGP public key, you will need to decrypt the files using your private key. Note that an administrator setting makes it possible to force every Confirmit user within a company to use encryption and FTP server during data transfer.
- **Character encoding for data file** - select ANSI or Unicode as appropriate.

26.2.2.2.3. Source Type > Confirmit Survey Database

Select this option if the data source is a Confirmit survey database. The Source tab layout is then as shown below.

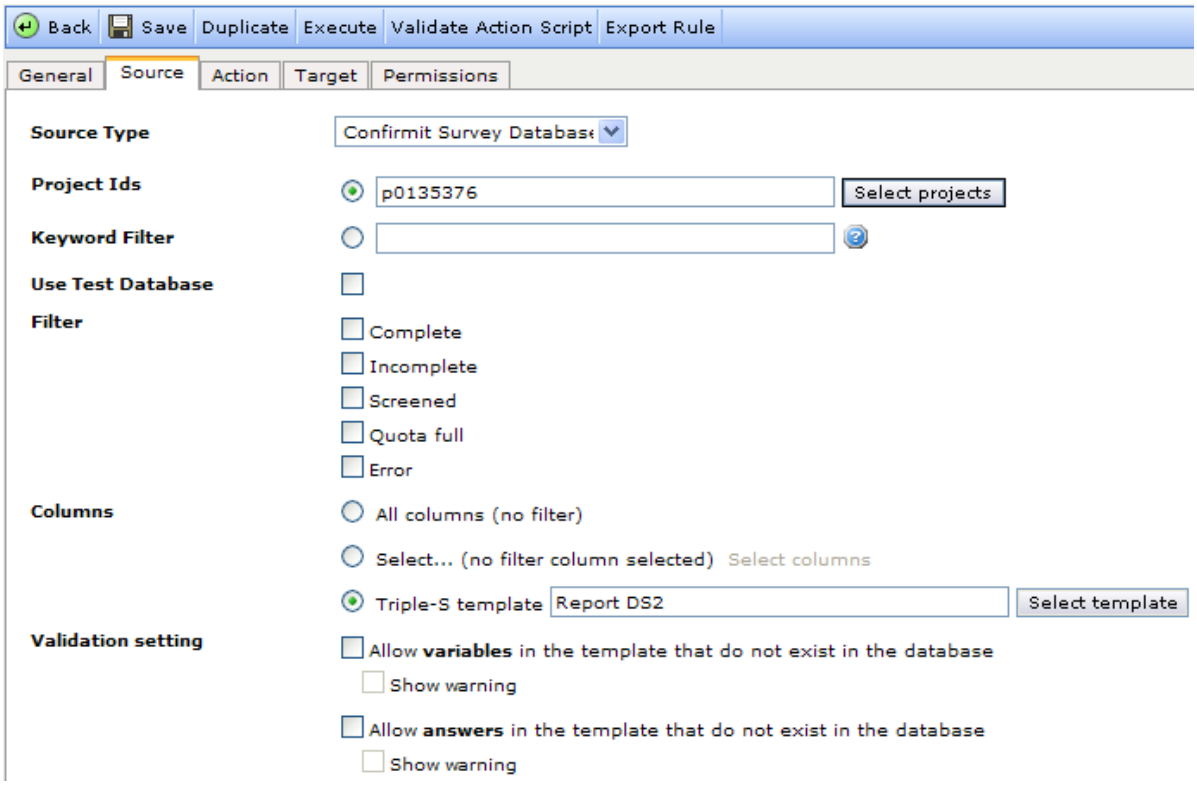


Figure 807 The Source tab with Survey Data selected as the Source Type

The properties and options are as follows:

- **Project ID –** you can select a project either by its Project ID or by keywords. To use Project IDs, click the radio button and select the required project (note that you can select only one).
- **Keyword Filter** - click the radio button and type in the required keyword. All projects with these keywords will then be included (go to The General Tab on page 132 for more information).
- **Use Test Database** - check if you wish to test the rule using data from the Test database.
- **Complete responses –** selects only data from surveys with the status Complete.
- **Incomplete responses –** selects only data from surveys with the status Incomplete.
- **Screened –** selects only data from surveys with the status Screened.
- **Quota full** - selects only data from surveys with the status Quota Full.

- **Error** - selects only data from surveys with the status Error.
- **Update Type** - Select Full update, which updates all data, or Incremental update, which updates only the data that has been changed since the previous update (go to Survey Source on page 603 for more information)
- **Columns** - select the columns you wish to include; all, selected, or as used in the selected template.

Note: The Columns settings will not be available if the target is set to "Triple-S file" because then the Triple-S template on the target will control which columns are to be included.

- **Validation Settings** - if the Target Type selected is Triple-S Data File (go to Target Type Triple-S Data File on page 594 for more information), the Validation Setting options will be available. Check the boxes as required (go to Validation Rules on page 604 for more information).

26.2.2.3. The Action Tab

Use the Action tab to input scripting code to specify actions that are to be performed on the data.

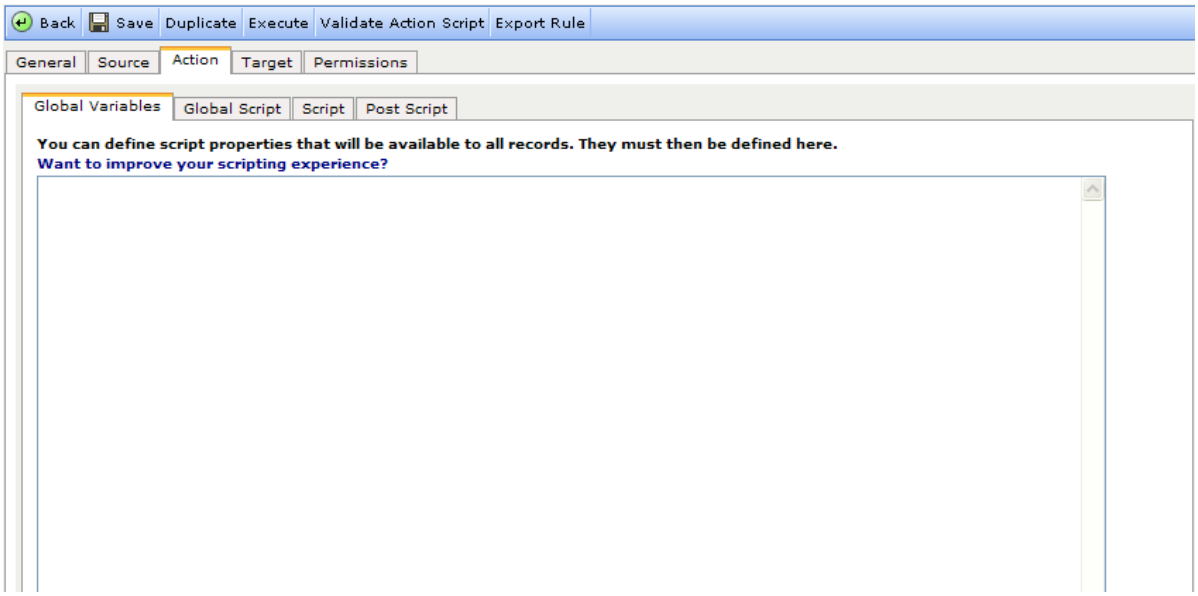


Figure 808 Example of the Action tab

Note: You are not required to enter information into this tab. Any scripting entered on this tab must be in JSCRIPT.NET. Refer to MSDN.COM for further details.

Fields selected in the Source tab (go to The Source Tab on page 588 for more information) are listed in the Available Variables column. These fields are available as Strongly Typed Properties in the script code.

If you wish to change data, write the required action into the field on the appropriate tab. The tabs are as follows:

- **Global Variables –** you can define script properties that will be available to all records. They must then be defined here.
- **Global Script –** actions written here are run once at the beginning of the process.
- **Script –** write in here the actions that are to be run on the selected source records. The actions are run once for each record.
- **Post Script** - actions written here are performed once, after all other actions have been performed.

Note: You can download and install the Code Completion function to assist you while scripting (go to The Code Completion Functionality on page 288 for more information)

26.2.2.4. The Target Tab

Use the Target tab to select the target for the data defined in the Source tab (go to The Source Tab on page 588 for more information). The fields available on the Target tab depend on the Target Type that you select.

26.2.2.4.1. Target Type > Confirmit Survey Database

When the Source Type (go to The Source Tab on page 588 for more information) is set to Triple-S Data, the Target tab will be as shown in the figure below.

Note: When the Source Type is set to Confirmit Survey Database, the Execution Mode and Key Field properties are hidden, the Columns options become active, and the Validation Setting options are only available if Columns is set to Triple-S Template.

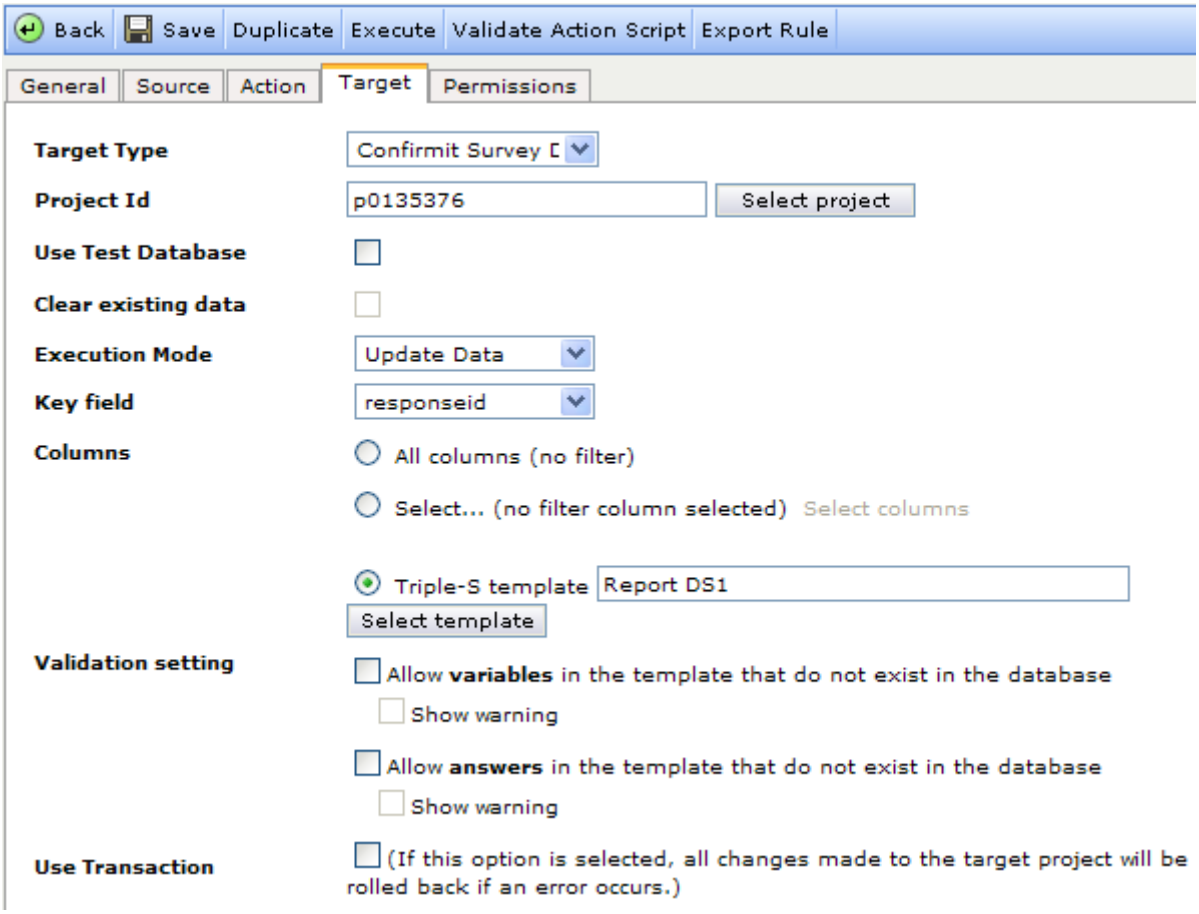


Figure 809 The Target tab when the Source Type is set to Triple-S Data and the Target Type is set to Confirmit Survey Data

When Target Type is set to Confirmit Survey Data, the properties and options available on the tab are as follows:

- **Project ID –** type in here or select the project ID of the target.
- **Use Test Database –** check this box if you are testing the setup and wish to use data from the test database.
- **Clear existing data –** becomes active when the Source Type is set to Confirmit Survey Database (it is inactive if Source Type is set to Triple-S Data File). Check to remove all existing data from the database before adding the new data.

WARNING: All your data will be deleted.
If you select Clear Existing Data, ALL existing data will be removed from the database when the rule is run; not just the variables in the schema. This deletion process cannot be undone. Be very careful when using this option.

- **Execution Mode** - select how the data is to be added to the target database. The system reads the value of the selected key field a data row in the incoming data file and checks to see if a row with the same key already exists.

You can choose between three modes for importing the data, listed below. In both these two modes the user will be asked to provide a key. The keys available are respid, responseid, and any field in the survey database that has an index (go to The General Tab on page 160 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 will use the key to check whether records in the source already exist in the target.

- **Update Data** - records in the source that already exist in the target survey database will be updated with values from the source. Records in the source that do not exist in the target survey database will be ignored.
- **Append Data** - records in the source that do not exist in the target survey database will be added to the target survey database. Records in the source that already exist in the target survey database will be ignored.
- **Merge data** - the data from the source will be added to the target survey database as new records. Records in the source that already exist in the target survey database will be updated. Records in the source that do not exist in the target survey database will be added to the target survey database.

In all 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.

- **Columns** - select the columns you wish to include; all, selected, or as used in the selected template.
- **Validation Settings** - check the boxes as required (go to Validation Rules on page 604 for more information).

.

26.2.2.4.2. Target Type Triple-S Data File

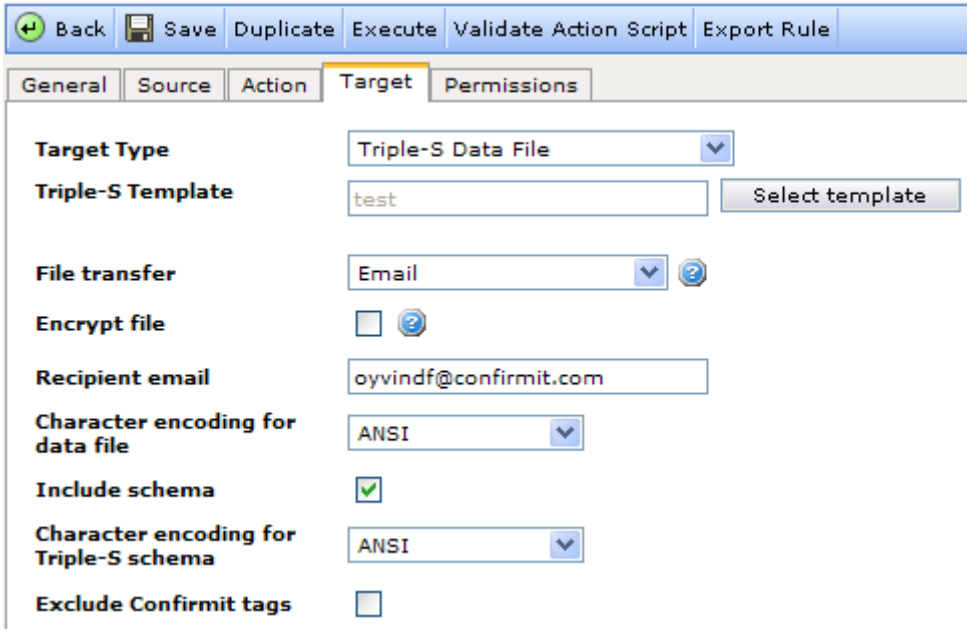


Figure 810 The Target tab with Triple-S Data File selected

When Target Type is set to Triple-S Data File, the properties and options available on the tab are as follows:

- **Triple-S Template** - select the template to be used from the Triple-S Template List.
- **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 the file is to be sent via email, this is the recipient's email address.
- **Character encoding for data file** - select ANSI or Unicode as appropriate.
- **Include schema** - only for Triple-S. The export will normally include two files; the data file and the schema (XML template). If for example you are performing a recurring task, you may not need to export the schema every time.
- **Character encoding for Triple-S schema** - select ANSI or Unicode as appropriate.
- **Exclude Confirmit tags** - check the box if you wish to exclude Confirmit precode tags (go to Confirmit Tags on page 607 for more information).

26.2.2.5. The Permissions Tab

The user who creates a rule has full administrator rights to that rule. All other users have no rights; they cannot even see the rule in their rule list, until the creator has allocated the appropriate rights to them. The Current Rule Permissions tab allows the creating user to allocate access rights to the rule he/she has created, to the various other users in the company.

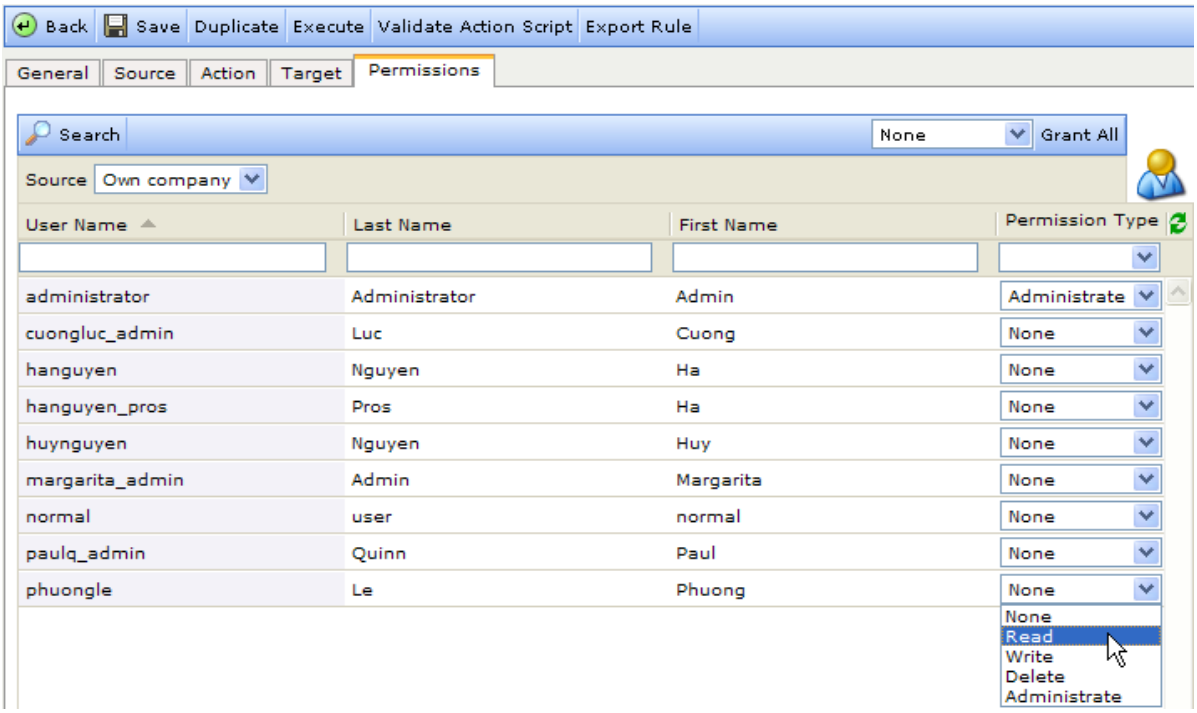


Figure 811 Example of the Permissions tab for a rule

For each user listed, click the down-arrow in the Permission Type column and select the appropriate permission. On completion, save the changes.

In the event the list of users is extensive, add search criteria to the various search fields then click **Search** to reduce the list to manageable proportions.

If all the employees in your company are to have the same permission level for the rule, select the permission level from the drop-down list towards the right end of the Search toolbar, then click **Grant All**. All employees will then be given the selected permission.

26.2.3. Current Rule Set

A Rule set is a number of rules that are to be run consecutively. The rules are run in the order in which they are listed in the set.

To open the latest rule set selected from the Rule Set List during the current session, go to the **Data Processing > Current Rule Set** menu command. If no rule set has been selected during the current session, then the Rule Set List will be displayed (go to Rule Set List on page 603 for more information)

When you click on a rule set in the Rule Set List or go to the **Data Processing > Current Rule Set** menu command, the Rule Set Details page opens at the General tab as shown in the example below.

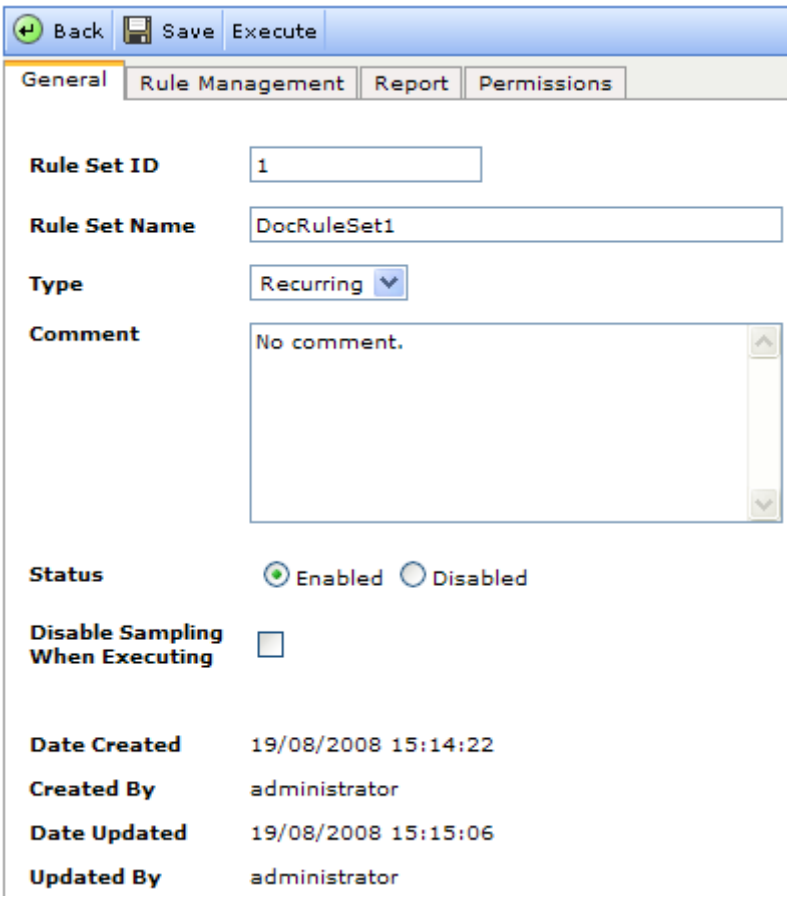


Figure 812 Example of the Rule Set Details General tab

26.2.3.1. The General Tab

The Rule Set Details page opens at the General tab.

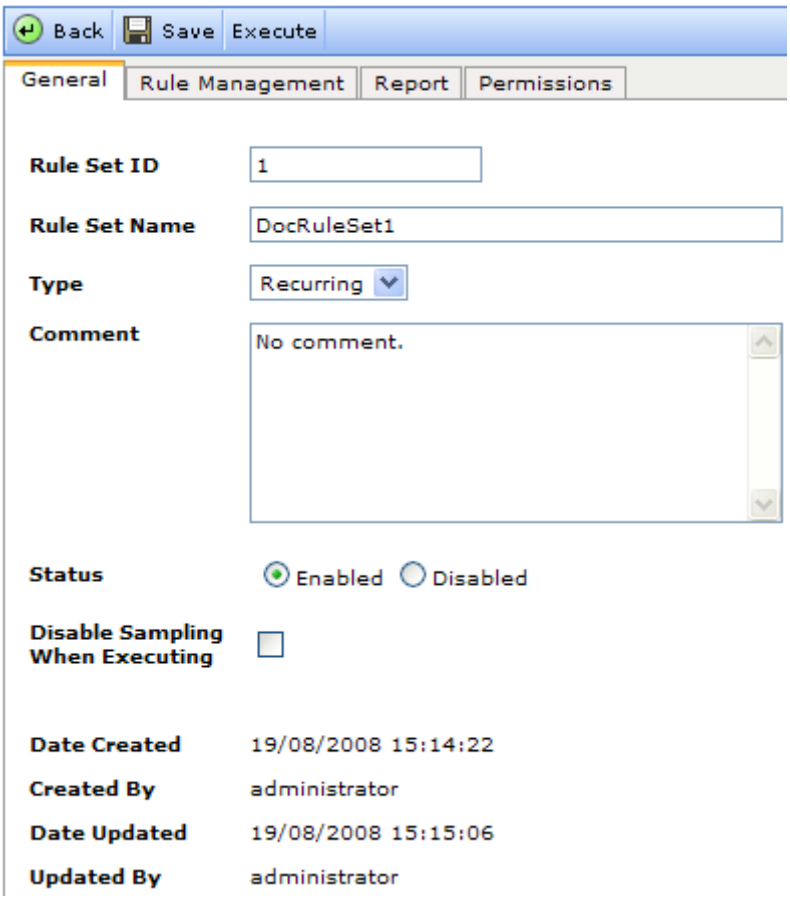


Figure 813 Example of the Rule Set Details page > General tab

- **Rule Set ID –** the identification number for the rule set. This number is generated automatically by Confirmit and cannot be changed.
- **Rule Set Name –** the name given to the rule set when it was created/last edited. You can change this name as required.
- **Type –** the type of rule set. The options are:
  - **Ad Hoc –** a rule set that is created for a specific use/event.
  - **Recurring –** a rule set created to perform a long-term job, that will normally recur at regular intervals.
- **Comment –** a description of the rule set, to simplify identification.
- **Status –** the status for the rule set.
  - **Enabled –**allows the rule to be run “as required”. This is the default setting.
  - **Disabled –** select this option if you wish to prevent the rule from being run. This could be useful if you have a recurring task, and wish to stop using this rule set in that task for a period but do not wish to change the task permanently.
- **Disable Sampling When Executing –** check the box to prevent sampling being performed on the database while the rule set is being run.
- **Date information –** for information only.

26.2.3.2. The Rule Management Tab

Use this tab to specify what is to occur in the event Confirmit discovers an error whilst the rule set is running.

- To add rules to the set, select the required rule and click Add (go to How to Add a Rule to the Rule Set on page 598 for more information).

- To set up the properties for a rule in the set, double-click on the rule in the left column to open the Details page. The example below shows the details page for the "Export data to excel..." rule that has been selected in the left column.

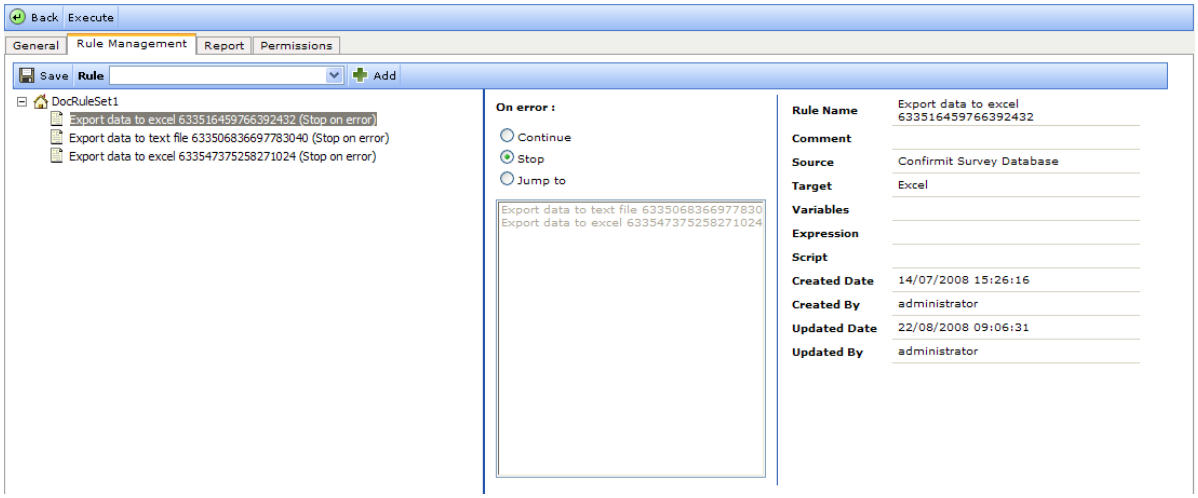


Figure 814 Example of the Rule Management tab

- **On error –** select the function you wish to occur in the event Confirmit discovers an error whilst the rule set is running. The options are:
- **Continue –** select this option if you wish the rule set to continue running.
- **Stop –** select this option if you wish the rule set to be stopped.
- **Jump to –** select this option if you wish the current rule to be stopped and the rule set to jump to another rule. If you select this option, you must then select the rule to which the set is to jump, from the list below the “on error” options.

26.2.3.2.1. How to Add a Rule to the Rule Set

1. Go to the **Panel Management > Current Rule Set** menu command.
2. In the Rule Management tab, click the down-arrow beside the Rule field to open a drop-down list of the rules available.

Note: Once a rule is added to the set it is removed from the list so you cannot run the same rule twice in the same set.

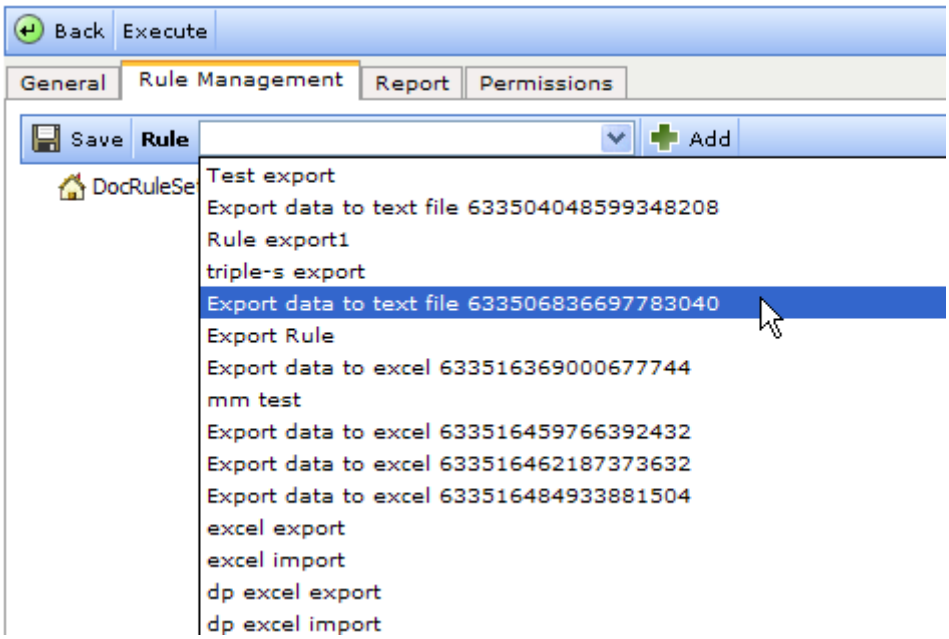


Figure 815 Selecting a rule to add to the rule set

3. Select the required rule from the list.
4. Click **Add**.

   The rule is added to the rule set.

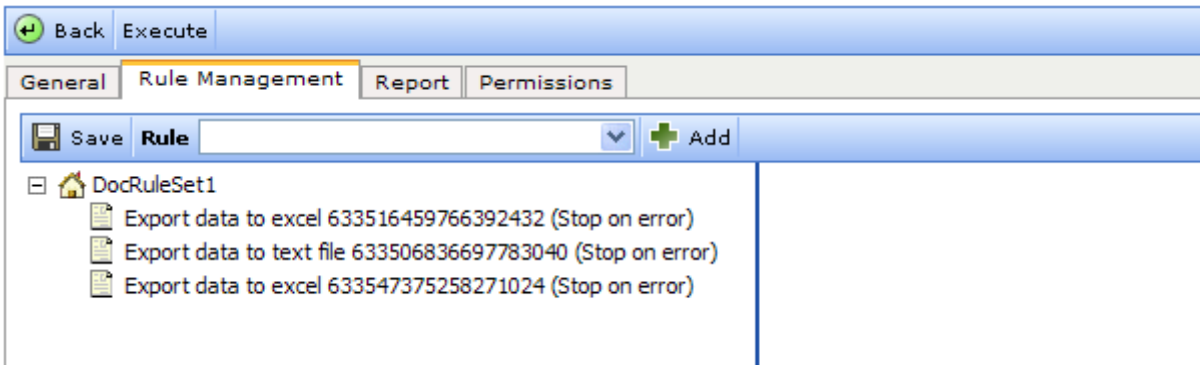


Figure 816 The rule added to the rule set

5. Double-click on the rule to open its Details pane, then make the appropriate settings (go to The Rule Management Tab on page 597 for more information).
6. On completion, click **Save** to save the changes.

26.2.3.3. The Report Tab

This tab provides an overview of the contents of the various rules selected in the Rule Management tab.

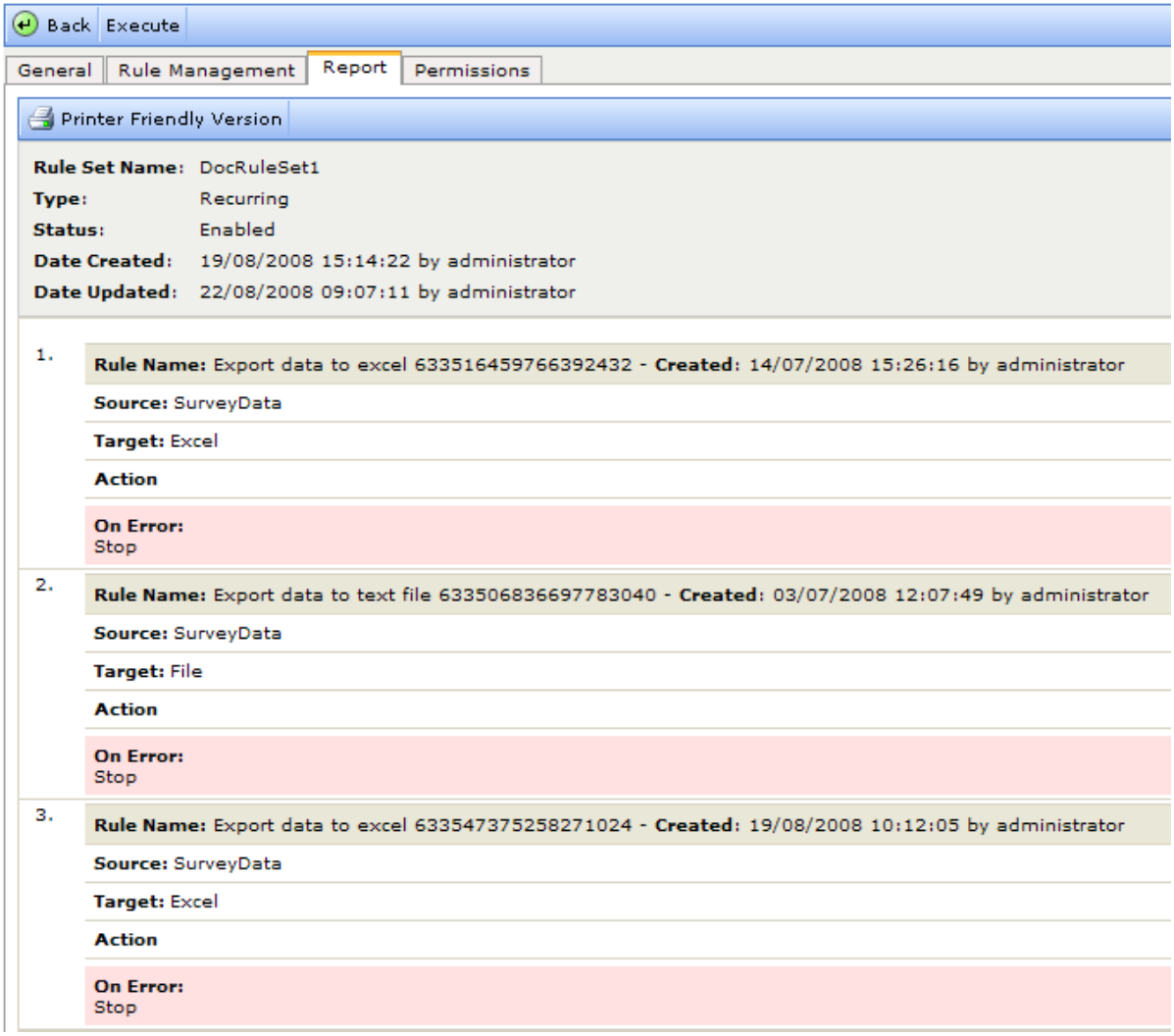


Figure 817 Example of the Report tab

Click **Printer Friendly Version** to open the report in a new window, formatted to be printed out.

26.2.3.4. The Permissions Tab

The user who creates a rule set has full administrator rights to that rule set. All other users have no rights; they cannot even see the rule in their rule list, until the creator has allocated the appropriate rights to them. The Current Rule Set Permissions tab allows the creating user to allocate access rights to the rule set he/she has created, to the various other users in the company.

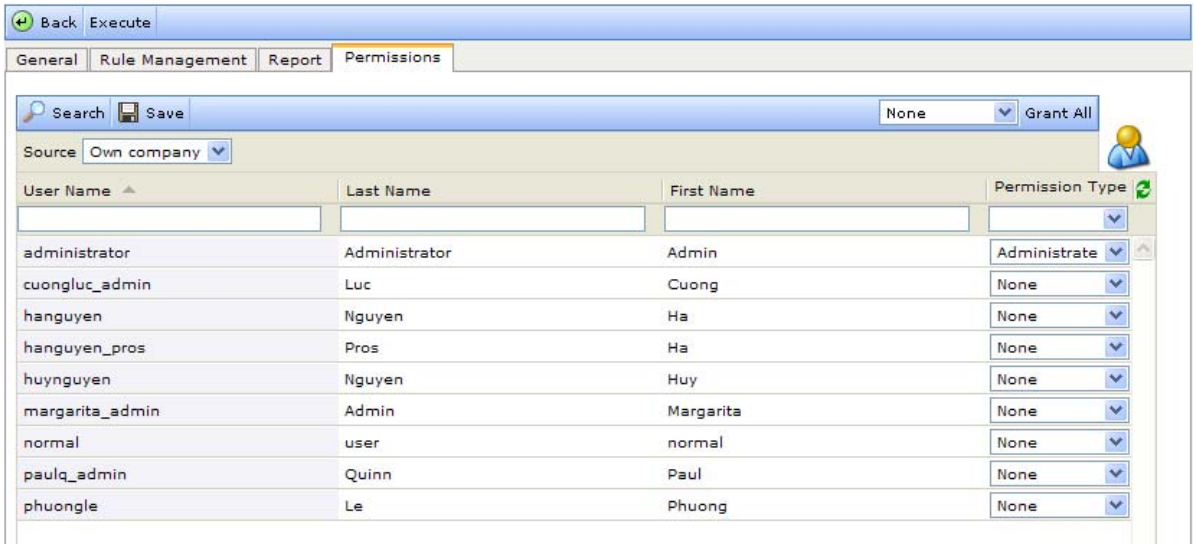


Figure 818 Example of the Permissions tab for a rule set

For each user listed, click the down-arrow in the Permission Type column and select the appropriate permission. On completion, save the changes.

In the event the list of users is extensive, add search criteria to the various search fields then click **Search** to reduce the list to manageable proportions.

If all the employees in your company are to have the same permission level for the rule set, select the permission level from the drop-down list towards the right end of the Search toolbar, then click **Grant All**. All employees will then be given the selected permission.

26.2.4. Rule List

Go to the **Data Processing > Rule List** menu command to display a list of all the Data Processing rules for this project. From the Rule List you can create new rules and import rules from other projects.

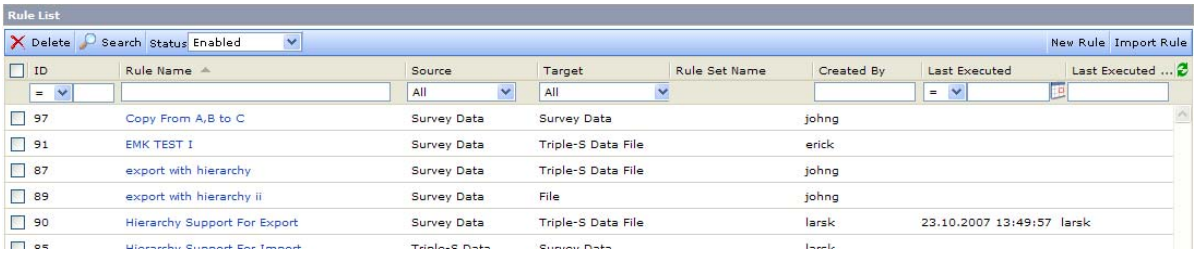


Figure 819 Example of the Rule List

Click on a Rule Name link to open the Current Rule page for that rule (go to Current Rule on page 585 for more information). The selected rule becomes the Current Rule (and will open every time you go to the Data Processing > Current Rule menu command) until you return to the Rule List and select a different rule or until you close the current Confirmit session.

26.2.4.1. How to Create a New Rule

1. When in the Rule List page, click the **New Rule** Button towards the right end of the Rule List toolbar.

   The Add New Panel Rule form opens at the General tab. Note that until you have named and saved the new rule, the other tabs in the form are inactive.

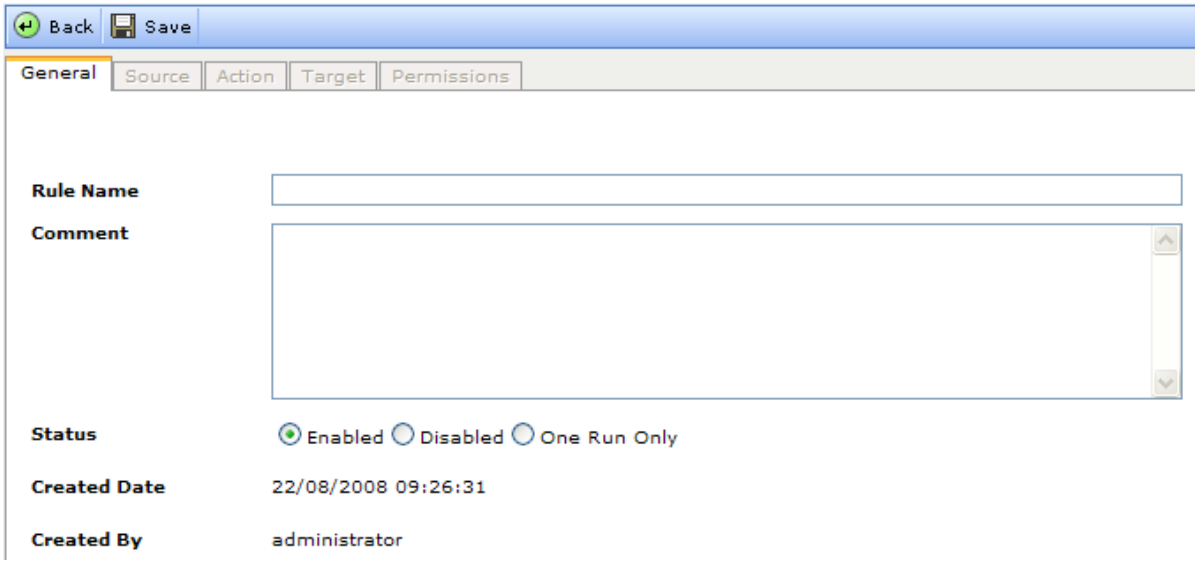


Figure 820 The Add New Rule page

2. In the Rule Name field, type in a name for your new rule.
3. Type a comment/description into the Comment field so others can see what this rule is intended for.
4. Select the desired Status for the rule (go to The General Tab on page 585 for more information).
5. On completion, click **Save**.

The new rule is saved and will now appear in the Rules List. The system allocates a Rule ID to the new rule, and this ID is displayed towards the top of the form. The Source, Action and Target tabs become active.

26.2.4.2. How to Import a Rule

You can copy rules to other servers by using the Rule Export functionality (go to How to Export a Rule on page 587 for more information). Proceed as follows to import a rule into the current server once it has been exported from another.

Note: The rule must be available as an .XML file (zipped or open) in a folder accessible from the current server. The file will have been sent, attached to an email, from the originating server.

1. Go to the**Data Processing > Rule List** menu command to open the Rule List window.
2. Click the **Import Rule** button towards the right end of the toolbar.

   The Rule Import dialog opens.



Figure 821 The Rule Import dialog

3. Browse to and select the file.
4. Type a name for the rule into the Rule Name field.
5. Click **OK**.

   The rule is imported and added to the Rule List. Click on the blue **Rule Name** link to open the rule in the Current Rule window (go to Current Rule on page 585 for more information).

26.2.5. Rule Set List

A Rule Set is a number of rules that are to be run consecutively. The rules are run in the order in which they are listed in the set. Go to the **Panel Management > Rule Set List** menu command to display a list of the rule sets available to you.

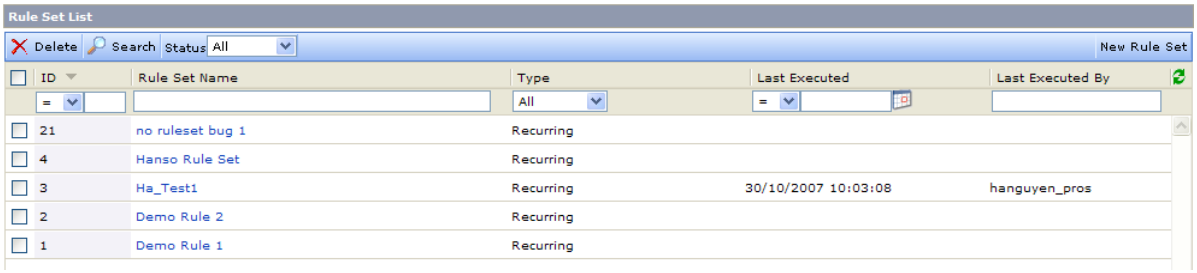


Figure 822 Example of the Rule Set List

Click on a blue **Rule Set Name** link to select that rule set and open the Current Rule Set window (go to Current Rule Set on page 595 for more information). In the event the list is extensive, use the search functionality to reduce the list to a manageable size. In the Rule Set List window you can also create new rule sets.

26.2.5.1. How to Create a New Rule Set

1. In the Rule Set List window, click the **New Rule Set** button towards the right end of the toolbar.

   The New Rule Set dialog opens.

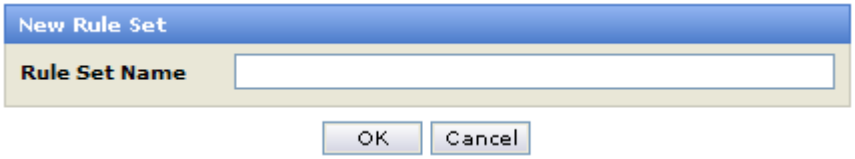


Figure 823 The New Rule Set dialog

2. Type the name of the new rule set into the field, then click **OK**.

   The rule set is added to the list.

Click on the blue **Rule Set Name** link for the rule set to select it and open the Current Rule Set window (go to Current Rule Set on page 595 for more information). Here you set up the rule set properties and add rules.

26.3. Technical Details

The following sections provide further technical details.

26.3.1. Survey Source

The Confirmit Survey Source reads responses from one or more surveys. Multiple surveys can either be chosen by selecting them from a list of surveys, or by setting a keyword filter. The keyword filter will match any survey that is assigned a particular category/keyword in the Project Overview page in Confirmit (go to The General Tab on page 132 for more information).

Incremental Updates

The source supports incremental read mode. This means that only changed or new responses for a survey (since the rule was last executed) will be included in the buffer. The matching is based on the “last touched” column in the response control table. If this value is later than the last executed time for the rule (for this particular survey), then the response is included in the buffer.

Multi Source Surveys

When selecting multiple survey sources using the keyword filter, new surveys may be included that were not part of the source during the previous execution. For these new surveys, all responses will be read, even if the source is set to incremental read mode, as they will not have been synchronized before. The multiple-survey source will transfer data from one survey at a time. If a transfer for a survey fails, the task will be aborted.

Survey data will not be removed from the destination, even if the survey is removed from Confirmit. The only way to remove the data is to clean the destination and to schedule a complete transfer of all sources.

Note: Executing the rule for Multi Source Survey transfers requires considerable resources and it will take a considerable time to run (in extreme cases several hours). In addition, Confirmit cannot guarantee that Multi Source Surveys including more than 20 surveys will function correctly. Multi Source Survey transfers should therefore be limited to a maximum of 20 surveys.

Uncommitted Reads

In order to achieve maximum performance, the Confirmit Source will read uncommitted data and will not use any transactional locking mechanisms.

26.3.2. Survey Target

The Confirmit Survey Target writes data from one of the supported sources. It uses two different modes for matching rows:

- With a Confirmit Survey as the source, it will use the rowguid in the response control table to match the rows.
- When a Triple-S data file is being imported to Survey Data, if the user selects responseid as the key field then it will be used.

The target will identify whether the row is a new row or an existing row. In the event the row is new, the target will create a new response with corresponding response control values. If the row exists, the target will update the values for the columns provided.

Bulk Inserts and Table Updates

To improve performance, the Confirmit Survey Target will first perform a bulk insert of all the data into a temp table. The target will then identify which rows are new and which rows already exist in the survey. The process of moving (insert or update) the data from the temp table to the actual response tables completes the procedure.

26.3.3. Validation Rules

Triple-S schemas (templates) hold the meta information about target and source: Which variables are to be read from the source and updated in the target, the variable types, answer lists etc. When running a rule, with data flowing from the source to the target, some validation must be done to verify that the schemas match.

There may be different templates for source and target, and there may be differences between the templates and the survey databases when the source or target is a Confirmit survey database. When a rule is run, three basic validation checks are performed:

1. If the source is a Confirmit database and a Triple-S template is used, the source database is checked against the Triple-S template.
2. The source Triple-S template is compared with the destination Triple-S template.
3. If the target is a Confirmit database, the target database is checked against the Triple-S template.

These three checks are run for both the variables (questions) and the answers in the data file. As one of the main benefits of using the templates is to reduce the number of variables processed in the data processing rule to optimize performance, it is not an issue if there are more variables in the survey database than are described in the template. This process reduces the volume of data to be transferred and thereby speeds up the export/import task. However the following situations may cause issues and will be default make a data processing rule abort:

- **The Triple-S template used in the source lists more variables than are available in the source database.**

  By default, if this validation returns an error, the data processing rule execution will abort. However you can override this rule and log a warning instead of aborting the task, or even switch off this validation check completely. Variables that are missing in the source database will then be available in the source template, but will be empty (no values).

- **The answer lists in the Triple-S template used in the source do not match the answer list in the source survey database.**

By default, if this validation returns an error, the data processing rule execution will abort. However, you can override this rule and log a warning instead of aborting the task, or even switch off this validation check completely. The values stored for these variables will then be read even though they do not match the answer list in the template.

- **The variable type in the Triple-S template used in the source does not match the variable type defined in the source database.**

  If this validation returns an error, the data processing rule execution will abort. This validation can not be overridden.

- **The Triple-S template used in the target lists more variables than are in the target survey database.**

  By default, if this validation returns an error, the data processing rule execution will abort. However, you can override this rule and log a warning instead of aborting the task, or even switch off this validation check completely. No attempt will be made to write anything into the target database for variables that do not exist in the database.

- **The answer lists in the Triple-S template used in the target do not match the answer list in the target survey database.**

  By default, if this validation returns an error, the data processing rule execution will abort. However, you can override this rule and log a warning instead of aborting the task, or even switch off this validation check completely. The rule executor will then write the values to the database even though there is a mismatch between the answer list in the template and the database.

- **The variable type in the Triple-S template used in the target does not match the variable type defined in the target database.**

  If this validation returns an error, the data processing rule execution will abort. This validation can not be overridden.

For a rule with a survey database in both the source and the target, it is possible to specify different Triple-S templates for the source and the target. For other combinations, the template will either be inherited from source to target (as in Triple-S import to survey database) or inherited from target to source (as in Triple-S export from survey database). With both a Triple-S template for source and a Triple-S template for target, the following situations may cause issues:

- **The Triple-S template used in the target lists more variables than the Triple-S template used in the source.**

  By default, if this validation returns an error, the data processing rule execution will abort. However, you can override this rule and log a warning instead of aborting the task, or even switch off this validation check completely. Variables that are missing in the source template will then be empty (no values).

- **The answer lists in the Triple-S template used in the source do not match the answer list in the target Triple-S template.**

  By default, if this validation returns an error, the data processing rule execution will abort. However, you can override this rule and log a warning instead of aborting the task, or even switch off this validation check completely. The rule executor will then write the values to the database even though there is a mismatch between the answer list in the two templates.

- **The variable type in the Triple-S template used in the source does not match the variable type defined in the target Triple-S template.**

  If this validation returns an error, the data processing rule execution will abort. This validation can not be overridden.

As mentioned, for some of the validations, you have three possible choices:

a) An error is raised and the process stops (strict handling) - this is the default setting and will apply if you do not make any other selections.

b) You can switch off validation and allow the process to continue - check the **Allow variables ...** and/or **Allow answers ...** boxes (see the figure below).

c) You can choose that the process continues but also display a warning - check the **Allow variables ...** and/or **Allow answers ...** boxes and also the appropriate **Show warning** boxes (see the figure below).

You make these selections in the **Validation setting** properties on the Source (go to Source Type > Confirmit Survey Database on page 590 for more information), the Target (go to Target Type > Confirmit Survey Database on page 592 for more information) and the General (go to The General Tab on page 585 for more information) tabs for the Current Rule in the event the source type selected is Confirmit Survey Data.

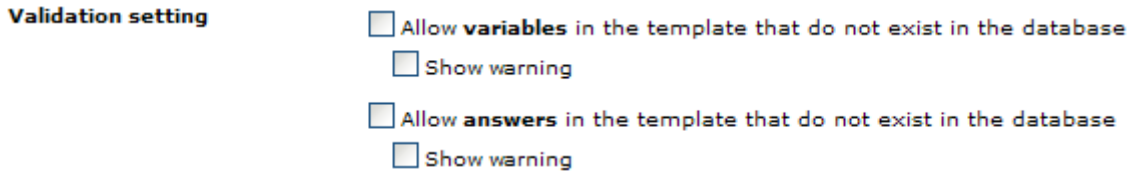


Figure 824 The Validation Setting options

The validation process will be performed before the SSIS package (rule) is executed. If a survey does not conform to the schema and the default settings are in force, data for the survey will not be transferred and a warning will be recorded in the log.

Note: All the variables in the source and target must be of the same type. This requirement may not be overridden.

26.4. The 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. An import program should ignore the locations of undefined category values.

The data field length is the highest category value in the associated <value> or <range> elements. If the data field length is less than the <position> element then it is assumed to be left justified within the locations defined by the position. Export programs should ensure that any extra columns contain blanks or zeros.

Note that in a CSV data file any data field representing a bit-style multiple which begins with "0" (zero) should always be delimited with double-quote characters. For example:

Data value	Maximum in <values> element	<position> element	Data record b=space, x=space or zero
1	1 to 9	start="21" finish="29"	100000000
1	1, 2, 3 and 9	start="21" finish="29"	100xxxxx0
1,3	1 to 12	start="21" finish="32"	101000000000
none	1 to 99	start="21" finish="120"	000000000...0
2,8	1 to 9	start="21" finish="30"	010000010b or 0100000100
2	1, 2, 3 and 9	start="21" finish="24"	illegal
missing	1 to 9	start="21" finish="29"	bbbbbbbbb
missing	1, 2, 3 and 10	start="21" finish="30"	bbbxxxxxxb
1	1 to 9	start="5" (csv format)	100000000 or "100000000"
2,8	1 to 9	start="5" (csv format)	"010000010"

Triple-S XML version 2.0

26.5. The Spread Format

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 should 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 should be right justified using leading space or zero characters as padding. Data values may be stored in any or all sub-fields.

If the data sub-field length is less than the sub-field defined in the <spread> element then it is assumed to be right justified within the width defined in the spread. Export programs must ensure that extra columns contain blanks or zeros within the sub-fields.

If the total width of the sub-fields is less than that defined in the <position> element then the sub-fields are stored consecutively left justified within the locations defined by the position. Export programs must ensure that any extra columns contain blanks or zeros. For example:

Data value	Maximum in <values> element	<spread> element	<position> element	Data record b=space
1	1 to 9	subfields="2" width="1"	start="21" finish="22"	10 or 01
1	1, 2, 3 and 9	subfields="2" width="1"	start="21" finish="22"	10 or 01
1,3	1 to 9	subfields="2" width="1"	start="21" finish="22"	13
1	1 to 9	subfields="2" width="2"	start="21" finish="24"	b1b0 or b0b1 or 0100 etc
none	1 to 9	subfields="2" width="1"	start="21" finish="22"	00
2	1, 2, 3 and 9	subfields="2" width="1"	start="21" finish="24"	20bb or 02bb or 2000 etc
1,42	1 to 999	subfields="2" width="3"	start="21" finish="26"	001042
missing	1 to 999	subfields="2" width="3"	start="21" finish="26"	bbbbbb
1	1 to 9	subfields="2" width="1"	start="4" (csv format)	1 or 10 or "10" or "01"
1	1 to 99	subfields="2" width="2"	start="4" (csv format)	"0100" or "0001"

Triple-S XML version 2.0

26.6. Confirmit Tags

Confirmit accepts numbers, letters and underscore (_) in precodes on Multi questions, but the Triple-S multiple variable type only accepts numeric precodes. On Multi questions with non-numeric characters in the precodes, the precodes 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 precodes 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 precodes in the Confirmit survey must be retained. Confirmit has therefore made an extension to Triple-S. A multiple variable with non-numeric precodes will then look as follows in the Triple-S schema file:

```
<variable ident="1" type="multiple">
<name>q1</name>
<label>Car brands</label>
<position start="100" finish="105" />
<values>
<value code="1" confirmit:precode="a">Ford</value>
<value code="2" confirmit:precode="b">Chrysler</value>
<value code="3" confirmit:precode="c">Volvo</value>
<value code="4" confirmit:precode="d">BMW</value>
<value code="5" confirmit:precode="e">Honda</value>
<value code="6" confirmit:precode="f">Toyota</value>
</values>
</variable>
```

When exporting the Triple-S schema, you may choose not to include these Confirmit tags in the schema file in case it causes issues for some importers. To do this, check the **Exclude Confirmit tags** box when exporting a Triple-S template (go to How to Export a Triple-S Template on page 584 for more information).

27. 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
- **Open text with numeric property** - 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)
- **Multi with numeric property** - (same as open text with numeric property)
- **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.

Meta data

- **Question title** - 255 characters
- **Question text** - Unlimited
- **Question instructions** - Unlimited
- **Answer/scale texts** - 2000 characters
- **Question ids** - 50 characters
- **Precodes** - 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 precodes - see the note below.

Note: In the database, the column headers are constructed as a combination of the question id and the precode, 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 precodes for grid and multi questions if the precode maximum has been increased above its default setting.

Scripts/masks

- **Script nodes** - Unlimited
- **Validation code** - Unlimited
- **Masks (precode 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

28. APPENDIX B: Confirmit LANGUAGE CODES

Note: Go to the Home > Help > Language Overview menu command to view a list of the languages available on the server on which you are working.

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
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
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.

513	Bosnian		bo
34820	Chinese	Mandarin	zh_mn
32772	Chinese	Simplified	zh_sm
31748	Chinese	Traditional	zh_cht
512	Welsh		cy

29. APPENDIX C: RESERVED KEYWORDS

The following Reserved Keywords must not be used as Question IDs:

All questions starting with underscore (_)

A

action

all

c

callback

comment

conn

env

group

in_use

interview_end

interview_start

interviewer

interviewerid

iterationid

l (except for use under special conditions (go to Handling Respondents in Multilingual Projects on page 349 for more information)

L (except for use under special conditions (go to Handling Respondents in Multilingual Projects on page 349 for more information)

last_handled

never_again

noofemailssent

not_in_quota

order

page

panelid

panelistid

projectid

r

respid

responseid

rid

rowguid

s

sample_category

select

State

state

status

stmpstatus

tries

Only for use in respondentlists:useridpasswordlanguage

Index

(

(operator), 170

3

3D Grid, 177, 179
  Answer list/Column display order, 178
  column masks, 279
  object in survey, 179
  question type, 177
  questionnaire routing in, 177
3D Grid properties
  deleted, 178
  keep position, 178
  not required, 178
  precode mask, 178
  question ID, 178
3rd Party Downloads, 7
3S Template List, 584

A

A function, 278
Abort tasks, Task Management, 32
access, 505
Access a Published Online Report, 503
Access an End User List, 500
Access Global Survey Layouts, 41
Access Local Survey Layouts, 45
Accessing Rapid Results, 387
Accessing Survey Layouts, 41
Action Tab, 591
Active Database, 563, 573
Active languages, 138
Add
  predefined list, 154
  quotas, 222
  validation code, 287
Add a New Company to a List, 507
Add a New Group to the List, 517
Add a New User to a List, 508
Add a Rule to the Rule Set, 598
Add a User to a Group, 517
Add a User to the Permissions List, 505
Add columns, 111
Add rows, 111
Add to Reportal Report, 394
Add Users dialog, 508
Additional survey link parameters, 341
Add-on, 288
Administrate End User, 505
Administration of End Users, 499
Administration of End Users Menu, 500
Administrator Info, 134
Advanced filter designer, 400
Advanced users, 1
Advanced WI Features, 158
Advanced WI Features Tab, 164
Aggregated Reporting, 407
Ajax technology, 283
Alignment, 399
All, 390
Always use HTTPS, 502, 515
Answer Field
  Include Image, 128
Answer list font, User Settings, 122
Answer List, Create, 154
Answer list, filtering, 277
Answer list/Scale/ display order
  (property), 162
Answer Lists, 166
Answer mask, 437
Answers, 153, 176
  list field, 165
  page, 153
  required testing, 287
Answers page
  background color (property), 158
  column width, 158
  exclusive, 158
  KeepPos, 158

language fields, 157
other, 158
precode, 157
right text fields, 157
weight, 158
Answers required
interview behavior, 318
Any, 220
AOL, 7
Appearance
error notifications recipient, 311
fixed area for error messages, 316
include progress bar, 315
survey design, 315
Append, 513
Application interface
chart, 465
containers, 465
containers, column, 466
containers, data, 465
containers, row, 466
groups, 465
options, 465
table, 465
Application interface, left frame, 463
Apply a Local Layout Globally, 45
Apply changes, 399
Apply Changes, 396
Apply filters, 429
Applying Styles at Different Levels, 65
Approve an Express Survey, 143
Archiving, 30
ASAP, 515
ASCII
export response data to, 532
export to, 546, 548
Ascribe Export, 559
Assign a Theme to a Survey Page, 46
Assign Published Online Reports to a Group, 519
Assign Report Iterations to a Group, 520
Assigned Online Reports Tab, 520
Attach a Group to a User, 510
Attach a Published Online Report Iteration to a User, 511
Attach a Published Online Report to a User, 511
Auto sum, 165
Autocheck Other, 164
Automatic time out, 2
Auto-next, 317
Available Items column, 510, 511, 518
Avoidance of “Spoofing” Status, 349

B

Back button, general options, 311
Back to top, 396
Back up
meta data, 3
response data, 3
Background color (property)
answers page, 158
Background variables (property), 162
Background variables, use of, 322
balanced hierarchy, 239, 240
Banner, Creating the, 387
Basic Panel List, 357
Basic Panels, 29, 356
Batch e-mailing, 343
Between, 390
BitStream files, 397
BitStream Files, 454
Recurrence, 456
BitStream Indexes, 457
Bitstream Variable, 163
Bitstring format, 566
Bitstring Format, 606
Block to Call, 185
Blocks, 181, 183
Body, 514
Boolean expression, 168, 469
Branches, conditional field, 169
browse, 513
Browser
limitations, 191
Button
<<, 393

>>, 393
Add to Reportal Report, 395
Apply Changes, 396, 398
Clear Banner, 389
Create New, 387, 388
Delete Report, 391
Edit Chart Settings, 398
Print this page, 394
Remove, 388
Report Settings, 396
Send to Excel, 392
Show Chart, 386, 397
View Printer-friendly Version, 394
Button images, 164

C

CallBlock, 184
CallBlocks, 183
CAPI/Kiosk application, 499
Captions (Database Designer), 236
Card Sort, 165
Cascading Style Sheets, 41
case-sensitive, 506, 512
Cell – area click for grid, 317
Cell matching - percentage, weight model, 420
Cell matching - weight, weight model, 420
Cell properties, 114
Change
report after publishing, 454
Change an End User's Password, 509
Change password, 372
Change Password, 122
dialog, 510
link, 504
Change task setup, 454
Change the Task Owner, 39
Changing Quotas and Quota Limits, 229
Character encoding, data export, 551
character set, 513
Chart component
3rd Party Downloads, 7
Chart type, 399
Check Duplicate Emails, 325
Check Growth, 135
Check script code, 296
checkbox, 316, 501
Chosen, 220
Cleaning data, 578
Clear data, 522
Closed, project status, 138
Code
language, 609
validation, 286
Code Completion, 288
Download, 289
Requirements, 289
Coder window, 381
Coding, 383
Coding of (property), 163
Coding screen size, User Settings, 122, 377
Coding system, 374, 375
Coding window, 381
elements, 382
heading, 382
Column container, use of items, 468
Column header ordering, 218
Column name (respondent list), 322
Column width, answers page, 158
Combident, language, 609
Comma (operator), 170
comment, 513
Comment, data export, 551
Community Panels, 29
Community Portals, 88
Companies, 499
Companies Tab, 506
Company field, 508
Company Identification number, 507
companyno, 512
Compare Survey Versions, 307
Compile
response database, 302
Complete, status-code (stop object), 173
Completed tasks, Task Management, 32

Component Properties, Survey Layouts, 48
Condition Builder, 168, 169
  operators and methods, 169
  precode, 170
  variable, 169
  variable definition, 471
Conditional node, 168
Conditions, 168, 276
Confirmit
  about this manual, 1
  what is it?, 1
Confirmit Express, 143
Confirmit Tags, Exclude, 607
Connect users to reports/pivot views, 450
Containers, pivot view, 467
Content, 399
Context-Sensitive Help, 11
Control panel, permission, 376
Convert a Project from Express to Professional, 143
cookies, 4
Copy
  object, 191
  project, 140
  rows, 154
Copy to Clipboard, 502
Copying files, 127
Count, 396
Count and Percent, 396
Create
  a New Rule, 601
  a New Rule Set, 603
  folder, 191
  Panel, 356
  pivot view in report tree, 459
  questionnaire, 145
  response database, 303
  skip-logic, 168
Create a Block, 183
Create a List of Answers, 154
Create a New End User List, 501
Create a New Triple-S Template, 580
Create New, 145
Create the Banner, 387
Created, 501, 502
Creating the Email, 340
Creator, 501, 502
Crosstab
  building
    crosstabs, 412
  options, 437
Crosstab settings
  Layout, 431
  X totals, 431
  Y totals, 431
CSS, 41
Current List, 500
Current Rule, 585
Current Rule Permissions tab, 594
Current Rule Set, 595
Current Rule Set Permissions tab, 600
Custom images, 164
Custom survey link text, 342

D

Data
  collection, 302
  export, 546
  import, 567
Data cleaning
  do not perform, 169
Data Collection, 302
Data container, use of items in, 467
Data export
  character encoding, 551
  comment, 551
  data export, 549
  export format, 548
  export template, 549
  fixed dates, 550
  fixed dates exports, interviews generated, 550
  language, 551
  loop iteration order, 556
  open ends, 549
  recipient email, 551

relative partial export, 550
start time, 551
timestamp filename, 550
Data file encoding, 566
Data only, no schema, 566
Data Processing, 578, 601
Validation, 604
Data Processing Menu, 579
Data transfer, 532
Data transfer column
grid, 532
multi, 532
open, 532
other, 532
single, 532
Data Transfer Encryption, 2
data, backup, 3
Database Designer, 234
access rights, 251
captions, 236
exporting table contents, 248
hierarchy, 234, 239, 251
balanced, 239, 240
unbalanced, 240, 244
relations, 241
schema, 235
synchronizing, 238
table lookup, 234, 251
table properties, 236
uploading table contents, 248
Date, 163
Date filter, 563
date format, 163
Debugging, 306
Decimals, 396
Decimals, general setting, 431
Default Image, 159
default language, 508
Default language, 312, 341
Default Skin, 51
Default validations, 318
Define
answers, 153
filters, 424
quotas, 222
Samples in a panel, 363
Defining a Loop, 175
Defining the Quota Values in List View, 227
Delete
cells, 112
columns, 112
object, 191
project, 140
quotas, 233
rows, 112
Delete a Report, 391
Delete access, 505
Delete an Image, 130
Deleted, 184, 185, 341
conditional field, 169
nodes, 164, 169, 177, 191
Deleted (property), 164, 191
Deleted items, recover, 493
Delimited Text File, 564, 575
Delimiter, 565, 575
Description field, 147
Description, folder field, 192
Designing questionnaire, 145
Designing questionnaires
Blocks, 181
email, 186
page, 185
secondary project, 189
Details page, 508
Details view, 150
Deviation Limit, 420
diff (function), 279
Difference (operator), 170, 171
Directive
multiple questions, 172
single question, 172
Directives, 171
Multiple_questions, 171
Single_questions, 171

Disable a scheduled task, 35
Disable update of noOfEmailsSent, 341
Discard changes, 399
Display answer labels in survey, 314
Display Name, 341
Distribution, 396
Do not perform data cleaning, 169
domain, 312
Download Code Completion, 289
Drag-n-Drop operations, 19
Drag-n-Drop ranking, 165
Dropdown (property), 162
Duplicate
  object, 191
  project, 140
Duplicate a Rule, 586
Dynamic Questions, 159, 283
  Example, 283

E

Edit
  3D grid objects, 178
  mode (answer page), 154
  modes (questions and answers), 21
  routing, 190
  template, 533, 534
Edit a Question Skin, 52
Edit a Theme, 48
Edit Banner, 387
Edit data, 522
Edit the Question Visual Components, 64
Edit the User Information, 509
Editing Result Charts, 397
Element level filters, 436
Else node (operator), 168
email, 567
Email, 186, 340, 513
  address, 508
  Preview page, 515
  Properties dialog, 514
E-mail
  User Settings, 121
E-mail
  send, 336
E-mail
  send, 343
E-mail
  batch, 343
Email Alert on Full Quota, 232
Email Delivery Report, 346
Email options
  override, 551
Enable 3D, 399
Enable Code Completion, 289
Encrypt file, 551, 567
Encrypt System Request Parameters, 312
Encrypted file, 574
End parenthesis (operator), 170
End User Administration, 501
  Menu, 500
End User List Access, 500
End User Management, 501
End users
  emailing, 514
  login interface for, 521
End Users, 499
  Administration, 499
EndBlocks, 182
Engine
  interview, 270
Equality (operator), 170, 277
Error, 179
Error Frame for Script Errors, 306
Error messages
  reserve fixed area for, 316
Error notifications recipient, 311
Evaluation of expressions, 469
Example Using Dynamic Questions, 283
Excel, 386
  Send to, 392
Excel chart component
  3rd Party Downloads, 8
  report element settings, 433
Excel file, export to, 546, 548

Excel Version, 564
Exclude Confirmit tags, 566
Exclude Confirmit Tags, 607
Exclude Precodes, 226
Exclude Translation, 176
Exclusive, answers page, 158
Exclusivity testing, 287, 318
Execute a Rule, 587
Executing tab, 33
Executing tasks, Task Management, 32
Execution mode, 575
Exit, 122
Export
  ASCII file, 546, 548
  data, 546
  Excel file, 546, 548
  Excel file -labels, 548
  loops, 555
  MS Word, 561
  open questions, 548
  questionnaire, 561
  reports, 411, 556
  single file, 555
  Task Management, 32
  triple-s export, 546
  Triple-S Export, 557
Export a Rule, 587
Export a Triple-S Template, 584
Export dialog, 566
Export fields, 535
Export file name, 551
Export Format, 564, 565
Export format, data transfer export, 548
Export Limits, 553
Export survey definition, 142
Export template, data transfer export, 549
Export, SPSS, 551
Exporting Data
  from an Optimized Database, 563
Exporting from an Optimized Database, 563, 566
Express, 143
Express Users, 1
Expressions
  Boolean, 168, 469
  conditional field, 169
  JScript, 160, 178
  syntax and evaluation, 469
External Quick Test, 300

F

F function, 270
Favorites, 30
Field width, 177
Field width (property), 161
Field width on open ends, 566
Fields
  descriptions (conditions), 169
  export, 535
  recoded, 535
  standard system generated, 534
  user defined, 535
  verbatim key fields, 534
File Encoding, 325, 513, 515
File Encrypted, 325
File handling, 575
File library, 123
  Copying files, 127
  Moving files, 127
  Uploading files, 124
File Library, 159
  Using Images, 128
File name, 325
File transfer, 551, 567
Filter, 424
  apply, 429
  define, 424, 425
  element level, 436
  global, 429
  grid question, 428
  multi question, 427
  options, 436
  ordered multi question, 428
Filter container, use of items, 468
Filter Operators, 390

Filtering answer list, 277
Finished report
  publish, 494
firstname, 513
Fixed dates
  data export, 550
Fixed dates exports
  interviews generated, 550
Folder
  create, 191
  dropping items into, 179
  scales and lists, 165
Font, 399
Font size, 399
Force new file set, 454
Form, 147
  grid, 148
  info, 147
  multi, 148
  open, 147
  single, 148
  standard types, 147
Form types
  3D Grid, 177
Format, 563, 573
  general setting, 431
Forms, quotas, 222
Frames and panes, 13
Frequency, report publisher option, 452
From, 341
FTP, 567
Functionality, sampling, 363
Functions
  a....., 278
  diff, 279
  f....., 270, 274
  inc, 277
  isect, 278
  nnset, 278
  nset, 278
  replace, 384
  set, 278
  size, 277
  toNumber, 277
  union, 278

G

General, 132, 517
General options, 311
  allow user to modify answers after the interview is complete, 313
  include back button, 311
General settings, 430
  Decimals, 431
  Format, 431
  Hide chart, 431
  Multipunch, 431
  Responses, 431
  Weighting, 431
General tab, 147
General Tab, 160, 585, 596
Generate
  interview files, 309
  response database, 302
  Web interview files, 309
Generate BitStream Files, 454
Generate dummy data, 296
Generate panel Web interview, 359
Getting Help, 10, 11
Global button images, 316
Global filters, 429
Global images, 164
Global Quotas, 228
Global replace, 384
Grant All, 595, 601
Greater than, 390
Greater than (operator), 170, 277
Greater than or equal, 390
Greater than or equal to (operator), 170, 277
Grid, 179
  3D, 177
Grid answer error
  Highlight cells, 179
Grid component, 3rd Party Downloads, 8
Grid question, 220

Grid view, 192, 215, 216
choosing from Item Menu, 192
configuration page, 192
configuration page for search/replace, 200
search/replace, 200, 202
Settings tab, 218
single node, 193
Grid View, 216
grid question, 195
info node, 194
open text, 195
scales/lists, 196
single question, 193
Grid view, page, 193
Grid view, quotas, 223
Group, 499
Group ID, 517, 518
Groups, 499, 517
Groups Details page, 517, 519
Groups Tab, 516, 519

H

heading 2, 40
Height, 399
Help, 10, 122
User Manual, 122
Help link (URL setup), 139
Hidden (property), 162
hidden fields, 221
Hide chart, general setting, 431
Hide Title and Description, 122
Hiding Unwanted Answer Alternatives, 226
hierarchical lookup, 251
Hierarchical lookup, 234, 239
hierarchy, 251
balanced, 239, 240
unbalanced, 240, 244
Hierarchy, 234, 239
self-referenced, 244
Wizard, 247
Hitlists, 478
color chooser, 480
columns, 481
columns, general, 481
general, 480
headers, 481
languages, 480, 481
titles, 480
Home
Archiving, 30
Basic Panels, 29
Community Panels, 29
Favorites, 30
main sections, 27
new item, 27
projects, 28
recent, 28
Tasks, 32
Home menu, 14
Home page, 27
Hot keys, pivot view, 463
Hover Image, 159
How an End User can Change Their Password, 504
How an End User can Change Their Settings, 504
How to
Access a Published Online Report, 503
Access an End User List, 500
Access Global Survey Layouts, 41
Access Local Survey Layouts, 45
Add a New Company to a List, 507
Add a New Group to the List, 517
Add a New User to a List, 508
Add a Rule to the Rule Set, 598
Add a User to a Group, 517
Add a User to the Permissions List, 505
Add to Reportal Report, 394
Apply a Local Layout Globally, 45
Approve an Express Survey, 143
Assign a Theme to a Survey Page, 46
Assign Published Online Reports to a Group, 519
Assign Report Iterations to a Group, 520
Attach a Group to a User, 510
Attach a Published Online Report Iteration to a User, 511
Attach a Published Online Report to a User, 511

Change an End User's Password, 509
Change the Quota View, 215
Change the Task Owner, 39
Convert a Project from Express to Professional, 143
Create a Block, 183
Create a CallBlock, 184
Create a List of Answers, 154
Create a New End User List, 501
Create a New Rule, 601
Create a New Rule Set, 603
Create a New Triple-S Template, 580
Create a Panel, 356
Create the Banner, 387
Define a Sample, 363
Define Quotas and Quota Forms, 222
Delete a Report, 391
Delete an Image, 130
Duplicate a Rule, 586
Edit a Question Skin, 52
Edit a Theme, 48
Edit the Question Visual Components, 64
Edit the User Information, 509
Execute a Rule, 587
Export a Rule, 587, 602
Export a Triple-S Template, 584
Generate BitStream Files, 454
Highlight Error Cells, 179
Import a Rule, 588, 602
Import a Triple-S Template, 583
Include an Image in a Text Field, 128
Include an Image in an Answer Field, 128
Link a Group to a Group, 519
Order a Triple-S Export in Confirmit, 557
Remove a Group from a User, 510
Remove a Published Online Report from a User, 512
Remove a User from a Group, 518
Replace a Triple-S Template, 584
Resize an Image, 130
Save a Report, 391
Send Emails to End Users, 514
Send to Excel, 392
Set the Default Skin, 51
Set the Default Theme, 47
Set up and Send the Review Email, 212
Set up the Questionnaire Reviewer, 211, 213
Upload a List of Users, 512
Upload Files to the File Library, 124
Use Images as Answer Options, 158
HTML code, 361
HTML mode, 116
HTML Styles, 65

I

Id, 341
Image
Delete, 130
Resize, 130
Image columns, 158
Image URLs, 164
images, 154, 158
Images, 118, 316
include in questionnaire, 128, 152
imited survey, 314
Import
data, 567
file names, 571
pick up files from server, 570
the import files, 572
Upload Files to a Lagacy Database, 568
validation, 572
Import a Rule, 602
Import a Triple-S Template, 583
Import Properties dialog, 576
Import survey definition, 119
Importing to an Optimized Database, 576
In, 390
inc (function), 277
include a logo, 152
Include an Image in a Text Field, 128
Include an Image in an Answer Field, 128
Include Back button, 314
Include link, 341
Include login info, 515

Include Portal link, 515
Include progress bar, 315
Include Reportal link, 515
Includes (operator), 170
Indexed, 163
Indexing BitStream Files, 457
Individual report, 488
  build, 473
  hitlist, 472
  modify, 492
  modify after publication, 498
  modify HTML, 493
  publish, 494
  search definitions, 472
  select layout and set properties, 490
  select reporting objects, 489
  set properties for each frame, 491
  set title for language, 490
  single view, 472
  wizard, 488
Individual report, user interface
  multiple choice search, 496
  open text search, 496
  predefined search, 497
  search in multi question, 497
  single choice search, 497
  sort hitlist, 497
Individual reporting, 472
  recover deleted items, 493
  user interface, 494
Inequality (operator), 170, 277
Inner loop, 275
Insert Block, 183
Install Code Completion, 289
Instruction field, 152
Internet-browser limitations, 191
Intersection (operator), 170, 171
Interview behavior
  answers required, 318
  exclusivity tests, 318
  other - specify checking, 318
  rank order tests, 318
Interview files, generate, 309
Interview progress, 140
Interview Status Filter, 563
isect (function), 278
Items, pivot view, 467
Iterated report
  create, 439
  publish, 448
Iterated reporting, 438
Iteration order, 177
Iterations, 500, 520
  define, 439
  window, 520
Iterator
  assign to report, 443
  connect to pivot view, 461
  create, 439
Iterator filter
  assign to pivot views, 445
  assign to report nodes, 444

J

JScript, 162, 270, 470
  based variables, 469
  code, 160
  expression, 160, 169, 178
  language, 168
  logical operators, 276
  object, 470
Jump to question, 396

K

KeepPos, answers page, 158
Key field, 575
Keywords, reserved, 615

L

Label click
  single and multi, 317
language, 513
Language, 160
  answers page, 157

codes, 609
combident, 609
default, 312
JScript, 168
project, 160
sub name, 609
subset, 160
User Settings, 121
Language and database modes, 23
Language field, 508
Language, data export, 551
lastname, 513
Launching, 302
Layout tab, 314
Layout, crosstab setting, 431
Legend settings, 399
Legend Visible, 399
Less than, 390
Less than (operator), 170, 277
Less than or equal, 390
Less than or equal to (operator), 170, 277
Limitations, Internet-browser, 191
Limited survey settings, 313
allow respondents to change their original answers, 313
Limited surveys, 3
handling respondents, 322
multilingual projects, 349
preparing respondent list, 322
uploading respondent list, 323
link, 502
Link a Group to a Group, 519
Link preview (URL setup), 139
List ID, 500
List Name, 500, 502
List Name field, 507
List Rows/Columns (property), 160
List view, 215, 219
List View, 227
List View Settings tab, 221
Lists, 165, 499, 500
nested, 165
predefine, 165
reuse, 165
Load Database dialog, 513
Locale, 564, 565, 575
Lock questions for coding, 379
Log off, 122
Log, project, 141
Logical AND (operator), 170, 171, 277
Logical NOT (operator), 170, 171, 276
Logical operators, JScript, 276
Logical OR (operator), 170, 171, 277
Login, 9
name, 121
Login box, 9
Login dialog, 503
Login interface for end users, 521
Login Interface for End Users, access, 521
Login pages, panelist, 370
Log-in sessions, 2
logo, 152
Loop, 275, 283
ID, 176
inner, 275
nested, 174, 275
options, 438
outer, 276
Loop handlin, 566
Loop object, 175
Loops
export, 555
separate files, 555
single file, 555
varable names, 556
Loops in topline reports, 299
Lost password requests, 362

M

Mail merging functionality, 339
Main sections
home, 27
Mapping Confirmit Variables, 585
Mask
assign to pivot views, 445

assign to report nodes, 444
pivot view, 468
Masking, 160
Masking Answer Alternatives in Quotas, 226
Masks
column, 279
question, 281
scale, 176, 272, 277
Max Iterations, 420
Menu, 500
Menus, 13
home menu, 14
project/panel menu, 14
Merge mail, 339
Meta Tags Tab, 49
Microsoft JScript, 270
Microsoft, 3rd Party Downloads, 8
Minimizing Spam, 348
Mode, 513
Mode, edit (answer page), 154
Modify answers after initial submission
general options, 313
Modify answers after the interview is complete
general options, 313
Modify individual report after publication, 498
Move
objects, 190
variables, 535
Moving files, 127
MS Excel, 564
MS Excel, export response data to, 532
MS Office reports, order, 446
MS PowerPoint
options, 435
templates, 79, 87
MS Word, export to, 561
Multi question, 220, 378
Multi Question Format, 565
Multilingual projects
handling respondents, 349
limited surveys, 349
open surveys, 349
Multiple choice search, individual report, 496
Multiple questions per page, directive, 171
Multipunch, general setting, 431

N

Name, 184, 185
folder field, 192
list field, 165
User Settings, 121
Name, column (respondent list), 322
Navigation, 384
Navigation buttons
customize, 316
Nested loops, 174, 275
New End User Group dialog, 517
New End User List dialog, 507
New item, 27
New Triple-S Template, 580
nnset (function), 278
No images, 164
Not chosen, 220
Not in, 390
Not required (property), 163
Notification on task completion, 35
nset (function), 278
Number of Subfields on Spread Multis, 566
Numeric (property), 161

O

Object
copy, 191
delete, 191
duplicate, 191
JScript, 470
move, 190
permissions, 136, 377
remove, 191
script, 174
security, 2
select multiple, 191
session, 2
stop, 173

undelete, 191
Object types
loop, 174, 275, 283
One or more, 390
One question per page, directive, 171
Online coding, 374
step-by-step guide, 385
Online coding tool, 374
Online reporting, 407
Online Reporting Options area, 503
Online Videos, 10
Open ends, data export, 549
Open in new window, 504
Open questions, export, 548
Open Survey, 314
Open surveys
multilingual projects, 349
URL, 310
Open Text search, individual report, 496
Open-ended question, 378
Open-ended questions, coding, 374
OpenText (property), 161
Opentext coding (property), 161
Operators and methods, Condition Builder, 169
Optimized database, 563
Optimized Database, 563, 573, 576
Optimized database format, 175
Order, 184
Order a Triple-S Export in Confirmit, 557
Order MS Office reports, 446
Order report, 410
Other - specify checking, 318
Other, answers page, 158
Outer loop, 276
Override Domain in Survey URL, 312
Override recipient email, 341
Overview
active languages, 138
delete project, 140
duplicate project, 140
general, 9, 132
permissions, 136
Project, 132
project status, 138
recurring tasks, 140
URL setup, 139
Overview Tab Properties, 419
overwrite, 513

P

Page, 185
Page Layouts, 51
Panel, 356
Create, 356
Define Samples in, 363
generate Web interview, 359
lost password requests, 362
Rule Builder, 363
survey overview in, 369
Panel menu, 14
Panel project
create new, 357
Panel templates, 87
panelist, 356
Panelist
login pages, 361, 370
options, 371
overview, 362, 363
recruit, 356
sending surveys to, 368
Web page templates, 360
password, 508, 512
Password, 9
change, 372
Password (property), 161
Password (user settings), 121
Paste rows, 154
Percent, 396
permission, 501
Permission Type, 601
Permissions
control panel, 376
object, 136, 377
read, 2

write, 2
Permissions Tab, 505, 594, 600
PGP encryption, 567
Pick up from FTP location, 574
Piping, 270, 282
Pitfalls, 191
Pivot view, 458
assign iterator filter to, 445
assign mask to, 445
connect iterator to, 461
connect users to, 450
containers, 467
create, 439
create in report tree, 459
difference between masks and filters, 468
group, 460
hot keys, 463
interface, 462
items, 467
mask, 468
publish, 450, 462
Placement, 399
Pop-up
script wizard, 319
PowerPoint
options, 435
templates, 79, 87
Precode, 153, 279
answers page, 157
Condition Builder, 170
Precode mask, 176, 270, 272, 277
Precodes, 155
Predefine lists, 165
Predefined list, add, 154
Predefined search, individual report, 497
Prepare for data collection, 302
Preparing for Data Collection, 302
Preview, 160
Primitives, 81, 361
Primitives, SQLServer, 469
Print, 393
Print this page, 394
Problems after new release, 4
Production
project status, 138
Profile, 120
Programming questionnaire, 145
Progress bar begin, 171
Progress bar end, 171
Progress bar, include, 315
Project
closed status, 138
copy, 140
delete, 140
duplicate, 140
languages, 160
log, 141
overview, 132
production status, 138
Project Id, 563, 573
Project ID, 147, 325
Project Info Titles and Info Fields, 134
Project management, 132
export survey definition, 142
import survey definition, 119
interview progress, 140
overview, 132
Project Management page, 146
Project menu, 14
Project Name dialog, 145
Project Overview Page
Saving changes, 133
Project status, 138
Projects, 28, 499
Projects in panel, 369
Properties, 160
cell, 114
table, 112
Property sheets, 19
Publish
individual report, 494
iterated report, 448
pivot view, 450, 462
reports, 87

Published Online Reports, 503, 517
Published report
  change, 454
  template, 87
Publisher
  reports, 87

Q

qualifier, 389
Quality conrtol, 291
Quality control
  check script code, 296
  External Quick Test, 300
  generate dummy data, 296
  quick test, 299
  random data generator, 291
Question
  multi, 378
  open-ended, 378
Question and answer editing modes, 21
  answerlists and scales/lists, 22
Question Filter, 390
Question id, 150
Question mask, 281
Question Properties, 160
  Advanced WI Features Tab, 164
  General Tab, 160
  Translation Status Tab, 165
Question Skins, 51
Question types, 270, 274, 282, 283
  3D Grid, 177
  grid, 270, 273, 274, 283, 318
  loop, 283
  multi, 270, 271, 272, 274, 283, 318
  open, 270, 271, 282, 318
  other, 270, 273, 283
  single, 270, 271, 282, 318, 407
Questionnaire
  adding new objects to, 147
  building
    questionnaire, 145
  export to MS Word, 561
  new, 145
  organizing, 191
  scripts, 270
Questionnaire design
  3rd Party Downloads, 8
Questionnaire map, 486
Questionnaire Reviewer, 211
  Reviewer Window, 213
  Set up and Send the Email, 212
  Setup, 211
Questionnaire Reviewer Window, 213
Questionnaire toolbox pane, 13
Questions
  define answers, 153
  export open, 548
  locking for coding, 379
  precode, 153
  unlock, 379
Quick access pane, 13
Quick test, 299
Quota
  Condition, 233
quota definition, 221
Quota full email, 218
Quota full, status-code, 173
Quota name, 218
Quotas, 215
  add, 222
  Changing, 229
  define, 222
  Defining quota values in List view, 227
  delete, 233
  Distribute the total, 224
  Email alert, 232
  forms, 222
  Global quotas, 228
  Grid questions in List view, 220
  Grid view, 216, 218, 223
  Grid view examples, 216
  How to Change Views, 215
  List view, 219
  List view Settings tab, 221

Masking Answer Alternatives, 226
Multi question in List view, 220
Properties page, 226
Recalculate All, 232
terminating interview for full quotas, 232
Update counters, 232
Uploading quota limits, 230

R

radio button, 316
Random data generator, 291
Rank order testing, 287, 318
Ranking (property), 161
Rapid Results, 386
Accessing, 387
Menu Bar, 387
Rdg %, 158
Read access, 505
Read only, 341
Read permission, 2
Recalculating All, 232
Recent, 28
Recipient email, 567
Recipient email, data export, 551
Recipient, error notifications, 311
Recoded fields, 535
Recoded variables (property), 162
Recoding
data, 469
variables, 469
Recoding data, 578
Recoding variables for reporting purposes, 408
Recovering deleted items, 493
Recruit panelists, 356
Recurrence, 567, 577
recurrence pattern, 516
Recurrence Pattern dialog, 516
Recurring Batch Emailing Tasks, 344, 347
recurring task, 516
Recurring tasks, 140
Recurring tasks, Task Management, 32
relations (Database Designer), 241
Relative partial export, 550
reminder emails, 344
reminders, 344
Remove
object, 191
Remove a Group from a User, 510
Remove a Published Online Report from a User, 512
Remove a User from a Group, 518
Replace function, 384
Reply to, 341
Report, 396
assign iterator to, 443
building
reports, 409
change after publishing, 454
Delete, 391
Excel, 412
export, 411, 556
order, 410
PowerPoint, 412
Save, 391
show, 410
Report element settings, 432
Excel chart component, 433
Report nodes
assign iterator filter to, 444
assign mask to, 444
Report page designer
HTML mode, 116
images, 118
text, 117
Report publisher, 87
Report publisher options
frequency, 452
Report Settings, 396
Report Settings and Navigation, 395
Report Tab, 599
Report, create, 439
Reportal, 386
Reportal Options Link, 502
Reporting
3rd Party Downloads, 7, 8

aggregated, 407
individual, 472
iterated, 438
online, 407
report frame, 407
reporting tree, 407
settings frame, 407
Reports, 499, 500
connect users to, 450
publish in Advanced Reporting, 451
Required answer testing, 287
Reserve fixed area for error messages, 316
Reserved keywords, 615
Resize an Image, 130
Respondent
avoid unnecessary inquiries, 339
handling in limited surveys, 322
handling in multilingual projects, 349
preparing list, 322
security and anonymity, 3
selection, 336
specific questionnaire, 3
system requirements, 6
uploading list, 323
uploading with access to data transfer encryption, 324
Respondent data editor, 326
enter/remove search fields, 326
search, 331
synchronization, 335
update data and delete respondents, 333
Respondent export, 331
with access to data transfer encryption, 332
Respondent input in Netscape, 7
Respondents using AOL, 7
Response data
backup, 3
clear, 522
Response database
create, 303
generate, 302
update, 302, 303
Response piping, 282
Responses, general setting, 431
Result Charts
Editing, 397
Results, 160
Reuse
lists, 165
Right text fields, 157
Routing
editing, 190
Row container, use of items, 468
Row header, 218
Rows
copy, 154
paste, 154
Rows field, 508
Rows/Columns (property), 161
Rule based send outs, 350
settings, 350
Rule Builder, Panel, 363
Rule editor wizard, 350
expression list, 366
settings, ruled based send outs, 351
Rule Executer page, 567
Rule List, 601
Rule Management Tab, 597
Rule Set List, 603
Rules
validation, 286
Rules for Uploading, 514
Runtime Errors, 306

S

Sample balancing, weight model, 420
Samples in a Panel, Define, 363
Sampling functionality, 363
Save Report, 391
Scale, 159
mask, 176, 272, 277, 437
Scales and lists, folder, 165
Schedule for later execution, 515
Scheduled task, disable, 35
Scheduled, Task Management, 32

Scheduling an Email for Later Execution, 516
Schema (Database Designer), 235
Schema file encoding, 566
Scratchpad, 152, 166, 191
Screened, status-code, 173
Script, 174, 270
  nodes, 287
  wizard, 319
Script Errors Frame, 306
Script-initiated windows, 4
Script-objects, 174
Scrollbar, 165
search, 501
Search
  coding window, 382
  criteria, 383
  Task Management, 32
search criteria, 506
Search Criteria, 478
Search definitions
  criteria, 476
  general, 475
  individual reporting, 474
  languages, 478
  titles, 476
Search in multi question, individual report, 497
Search lists, 25
Searchable answer list, 164
Searchable Answer Lists, 166
Searching, 506
Searching in the Task Pane, 35
Secondart project, 189
Secure Sockets Layer, 2
Security
    Data Transfer Encryption, 2
  issues, 2
  object, 2
segment, 388, 389
Select
  multiple objects, 191
  respondents, 336
Select language, 504
Select Languages dialog, 146
Selected Image, 159
Selected Items column, 511, 518
Selected settings will be applied to all charts, 399
Selection criteria, 337
Self-referenced hierarchy, 244
Send as HTML, 341, 515
Send as plain text, 341
Send confirmation email, 341
Send e-mail, 336, 343
Send email FW, 341
Send email if task aborts, 121
Send email on successful sampling, 121
Send Emails to End Users, 514
Send outs, rule based, 350
  settings, 350
Send to Excel, 392
Sender, 514
Sending surveys to panelists, 368
Separate files, 566
Series in rows, 399
Session
  log-in, 2
  object, 2
set (function), 278
Set First Question Fixed, 420
Set the Default Skin, 51
Set the Default Theme, 47
Set up and Send the Review Email, 212
Set up the Questionnaire Reviewer, 211
Settings, 430
  general, 430
  report elements, 432
  user, 120
Settings Tab Properties, 420
Shortcut to Style Editing, 67
Show
  deleted nodes, 191
Show label as value, 399
Show total, 399
Significance testing, 396
Single

question check, 407
Single choice search, individual report, 497
Single file, 566
Single File Export, 564, 565
Single view, 482
editor, 484
preview, 488
questionnaire map, 486
size (function), 277
Skinning Tab, 49
Skip-logic, 168
Slider, 165
Sort hitlist, individual report, 497
Sort, coding window, 382
Source Tab, 588
Source Type > Confirmit Survey Database, 590
Source Type > File, 588
Source type > Triple-S Data, 589
Spam, 348
Specification summary, 375
Spell Checker, 203
supported languages, 204
using, 204
Spread, 566
Spread Format, 606
SPSS, 151
export response data to, 532
SPSS export, 551
type, 554
value labels, 553
values, 554
variable labels, 553
variable names, 553
SPSS Export Limits, 553
SQL, 162, 338, 469
based variables, 469
SQLServer primitives, 469
SSL, 2
SSS Export, 557
Standard Blocks, 181
Standard form types, 147
Start Time, 326, 567, 577
Start time, data export, 551
StartBlocks, 182
Status filter, 396
Status-code, 173
complete, 173
quota full, 173
screened, 173
Stop-objects, 173
Structured Query Language, 162, 338, 469
Style, 158, 399
Style Editing
shortcut, 67
Styles at Different Levels, 65
Sub samples, 215
Subject, 514
Survey
add panel variable to, 368
example of a script for pop-up, 320
history page, 372
not completed page, 373
overview in a panel, 369
Survey data
data transfer, 532
edit data, 522
Survey Data, 522
Survey import/export through XML, 119
survey layout, 145
Survey layout, 40, 315
Survey Layout Component Properties, 48
Survey Layouts
Global, Access, 41
Survey Page Area Component, 48
Survey Question, 420
Survey reentry, 313
Survey settings, 310
Survey source, 603
Survey target, 604
Survey Type, 313
Surveys
default language, 312
limited, 3
open, 310

public, 3
quota, 215
section 508 accessibility, 316
variables, 270
web interview template, 315
Synchronization, 335
Syntax, expressions, 469
System generated fields, 534
System requirements, 4
3rd Party Downloads, 7
respondent, 6
users, 4

T

Table
add colums, 111
add rows, 111
background color, 113
cell padding, 114
cell properties, 114
cell spacing, 114
delete cell, 112
delete column, 112
delete row, 112
height, 113
insert, 111
properties, 112
width, 113
table lookup, 251
Table lookup, 234
Table Lookup, 176
Table properties, 112
Target
groups, 215
Target Tab, 591
Target Type > Confirmit Survey Database, 592
Target Type > Triple-S Data File, 594
Targets, 420
Task Management
abort tasks, 32
completed tasks, 32
executing tasks, 32
export, 32
recurring tasks, 32
Scheduled, 32
search, 32
task type, 35
Task Owner, changing, 39
Task Properties dialog, 515
Task Properties Page, 36
Task type, Task Management, 35
Tasks, 32
Executing tab, 33
Search tab, 35
Template editor
import of templates, 535
loops, 536, 537
Template editor, data transfer, 533
Template import
template editor, 535
Template List, 580
Templates, 79, 578
creating new, 82
editing attribute fields, 84
editing HTML fields, 85
editor, 533, 534
name, 534
pivot view, 87
PowerPoint, 79, 87
published report, 87
saving and previewing, 87
Web Interview, 79, 80
Temporary Internet Files, 4
Testing
answers, 287
exclusivity, 287, 318
rank order, 287, 318
Text, 117
field, 152
substitution, 270, 282
URL setup, 139
Text Field
Include Image, 128
The Help Information Page, 11

Then node (operator), 168
Third Party Downloads, 7
Time out, automatic, 2
Time series, 423
  properties, 423
Title details, 399
Title field, 151
Title font, 399
Title font size, 399
Title text, 399
Tmestamp filename, 550
toNumber, 171
toNumber (function), 277
Toolboxes, 15
Topline report, 297
  loops, 299
Total column, 396
Tracking E-mail Status, 346
Translation Status Tab, 165
Translation XML, 267
Translator, 255
  assigning groups of translators, 258
  assigning translators, 255
  assigning translators from other company, 256
  emailing projects to translators, 259
  entering the module, 255
  translation xmll, 267
Translators interface, 262
Trend reports, 423
Triggers, 159
Triple-S, 565, 578, 579, 583, 584, 589, 594
Triple-s export, 546
Triple-S Export, 557
Triple-S Format, 565
Triple-S Template List, 580
Triple-S Template, Replace, 584
Triple-S Version, 565
Triple-S Versions, 579
Trusted Site, 289
Type, SPSS export, 554

U

unbalanced hierarchy, 240, 244
Undelete objects, 191
Underscore, 151
Unicode Translator, 139, 287
union (function), 278
Union (operator), 170
Update
  response database, 302, 303
Update BitStream files now, 454
Update Current End User List, 501
Updating BitStream Files, 456
Updating Counters, 232
Updating the BitStream Files, 397
Upload a List of Users, 512
Upload file, 573
Upload Properties dialog, 513
Upload Users button, 513
Uploading files, 124
URL, 316
URL setup, 139
  end link, 139
  help link, 139
  link preview, 139
  text, 139
URL to survey, 310
Use by Login, 51
Use Fast Load, 325
Use HTTPS, 341
Use HTTPS connection, 122
Use Images in Answers, 159
Use Survey Layout, 315
Use Transaction, 577
Use Unicode Answerlist, 122
User
  advanced, 1
  system requirements, 4
User defined, fields, 535
User ID number, 509
User interface, individual reporting, 494
User key, User Settings, 121
User name, 9

User Settings, 121
User Name, 508
User Profile, 120
User Settings, 120, 146
answer list font, 122
Change Password, 122
coding screen size, 122, 377
e-mail, 121
Hide Title and Description, 122
Language, 121
name, 121
Send email if task aborts, 121
Send email on successful sampling, 121
Use HTTPS connection, 122
Use Unicode Answerlist, 122
user key, 121
user name, 121
working set size, 122, 377
User Settings Link, 504
User state, 2
userid, 512
Users, 1, 499, 517
connect to reports/pivot views, 450
Users tab, 507, 513
Using Your Own Domain on FIRM's Server, 347

V

Validate Emails, 325
Validating an Action Script, 587
Validation, 160
code, 286
custom, 270
default rules, 286
other-specify, 287
Validation code
add, 287
Validation Rules, 604
Validation Setting options, 586
Value label font, 399
Value label font size, 399
Value label settings, 399
Value labels, SPSS export, 553
Values, SPSS export, 554
Variable labels, SPSS export, 553
Variable names, SPSS export, 553
Variable type, 162
Variables
change order, 535
Condition Builder, 169
definition with Condition Builder, 471
JScript based, 469, 470
Mapping, 585
move, 535
recoding, 469
SQL based, 469
survey, 270
Variables, recoding
for reporting purposes, 408
Verbatim key field, 534
Version Comparison Tool, 307
Versions of Triple-S, 579
VideoSoft, 3rd Party Downloads, 8
Visual Components for Question Skins, 52
Visual components, 3rd Party Downloads, 7

W

Web Accessibility, 40
Web Interview
generate for panel, 359
generator, 309, 314
templates, 79, 80
Web Interview files
default language, 312
default validations, 318
general options, 311
survey layout, 315
survey type, 313
web interview template, 315
Web Interview files, generate, 309
Web page, templates for panelist, 360
Web Template, 502
Weight Model, 419, 420
Weight model types, 415
cell matching - percentage, 420

cell matching - weight, 420
sample balancing, 420
Survey Question, 420
Weight, answers page, 158
Weighting, 415
Weighting, general setting, 431
Welcome page, 27
What is Triple-S?, 579
WI Template, 79, 80
Width, 399
WinZip, 532
Wizard
Hierarchy, 247
Wizard, individual report, 488
Working in Confirmit, 13
drag-n-drop operations, 19
frames and panes, 13
language and datatbase modes, 23
menus, 13
property sheets, 19
question and answer editing modes, 21
questionnaire toolbox pane, 13
quick access pane, 13
search lists, 25
toolboxes, 15
Working on an HTML Style, 66
Working set, 383
Working set size, User Settings, 122, 377
Write access, 505
Write permission, 2
Wysiwyg HTML editor, 485

X

X Axis, 399
X totals, crosstab setting, 431
X/Y Axis label font, 399
X/Y Axis label font size, 399
X/Y Label settings, 399
XML survey export, 142
XML, survey import/export, 119

Y

Y Axis, 399
Y totals, crosstab setting, 431

Z

Zip files, 532