



Authoring User Guide

**The information on these pages describes Confirmit and its features as of March 1st 2007.
New features may be introduced into Confirmit after this date. Please check “News” and the Customer
Extranet for latest updates.**

Examples depicted herein are fictitious.

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What's New in this Issue?

The following Sections in this revision of the document contain new information:

- Section 4.10.2.1 How to Access Global Survey Layouts – a note is added to describe the additional columns visible in the Survey Layouts list when logged on as administrator.
- Section 4.10.2.2 Global Survey Layout Permissions – Figure 41 is updated to include the Company Specific checkbox, and the description in this section is expanded.
- Section 6.2 Interview Progress – The description in this section is expanded.
- Section 15.4.5 Sending E-mails – A note is added advising users that recurring tasks will cease to run if the user's ID expires.

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

1.1 About this Manual

Confirmit software is available either as a server installation or "log-in". They do not differ substantially, but in the instances they do, "log-in" specifics are marked with an "ASP only" text.

Throughout this manual we refer to different URLs, for example <http://author.confirmit.com> for Confirmit authoring and <http://survey.confirmit.com/>... to interviews etc. These refer to Confirmit Company's ASP installation with Rackspace in USA. If you are a Confirmit On-Demand 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 manual the terms "question" and "form" mean the same.

1.2 Confirmit Users

There are two types of Confirmit users: Advanced users and Standard users. Your Confirmit administrator is entitled to define this user level.

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

1.2.1 Advanced Users

Advanced users have to acquire the most complete knowledge of the Confirmit web application. They are typically responsible for these 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 Standard Users

These users are set up with permissions to build and administrate questionnaires in Standard designer, as well as to view top-line reports. 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 Standard questionnaire designer.

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 like *current project* is lost.

1.4 Security Issues

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). Our 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/pXXXXXXXXX.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. See chapter 5 File Library for more information about this functionality.

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 functionality makes it possible to transfer data from and into Confirmit in a secure way. The functionality is made specifically with respect to data and report exports, and respondent uploading and export.

The following data transfer tasks will support this new feature:

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

This functionality makes it possible to enforce every Conformat user within a company to use encryption and FTP server during data transfer. 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. For more information see chapters 15 Handling Respondents in Limited Surveys and 25.3 Data Transfer.

The encryption algorithm used by Conformat Company'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 Conformat, may use another algorithm.

Before starting to use PGP, check with Conformat Support that your user has been correctly set up with your public PGP key used for encrypted file transfers from Conformat.

Follow the procedure below to import PGP encrypted data in Conformat using Data import:

1. Encrypt your file using Conformat's public PGP key found in **Home > Help > Public PGP Key**.
2. Import the file to Conformat using Conformat Data Import, see section 25.3.7 Imports.

You can also upload PGP-encrypted data using FTP:

1. Encrypt your file using Conformat's public PGP key found in **Home > Help > Public PGP Key**.
2. Upload the file to your FTP upload area in Conformat using FTP in binary mode.
3. Import the file to Conformat using Conformat Respondent Upload, see section 15.2.1 Respondent Uploading with Access to Data Transfer Encryption and FTP.

1.4.4 Respondent Security and Anonymity

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

Conformat also supports *limited surveys*, in which a limited number of 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 merging may take place without the respondent knowing it. The good thing about the merging is that it makes it possible to produce *respondent specific questionnaires*. For instance, 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:

By this we mean all the data of a project, which 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 stored 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 Back up of Response Data

On-Demand only:

The MS SQL server periodically runs full back up of all response data in the database. In most cases it is possible to restore most of the data from a recent back up. In the case of a system failure, external media back ups 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 Conformat user has accidentally deleted a running project's response data. It is the responsibility of the Conformat 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 Conformat Users

Conformat is built on the latest technology and designed to be easy to use, scalable and stable. In order to support the feature set, the browser requirement for Conformat 11 is minimum Internet Explorer 6.0 (IE6) for Conformat Authors, and Internet Explorer 7 is supported.

To allow your IE6/7 browser to work optimally towards the Conformat 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 than 150 reduce the size, if already below no action is required).
- Add the Conformat 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.conformat.com and author.euro.conformat.com (type the addresses then click Allow). If you select not to include Conformat 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 Conformat 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.conformat.com**, **author.euro.conformat.com** (type the addresses then click **Allow**). Alternatively, set the general cookie setting to "Medium-High" (a lower setting is not recommended.)
- When Conformat is updated, excessive or old versions of temporary Internet files can cause problems. Therefore the first time you start Conformat 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 Conformat 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 Conformat authoring, see the following table.

Conformat 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.conformat.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: Conformat 11 supports MS SQL Server 2005 in addition to MS SQL Server 2000.

Note: 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

Table 1: Authoring Requirements

Note: System-generated error messages are translated into English, Norwegian, Swedish, German, French, Spanish, Finnish, Danish, Italian, Dutch, Portuguese, Japanese, Chinese Simplified, Chinese (Hong Kong), Korean, Arabic, Russian and Hebrew. For other languages, 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 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 Company 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 in order for surveys to work in as many browsers as possible. Users should note, however, that features added to surveys such as client side scripts, media playing, using certain cascading style sheet 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 still remain.

Confirmit Survey prerequisites (respondents)		
Element	Minimum	Recommended
Operating system	Any	Any
Web browser	Any browser supporting HTML 3.2	Any browser supporting HTML 3.2, CSS, client side scripting, and XHTML.

Table 2: Respondent Requirements

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.

The Advanced WI options (see chapter 14 Preparing for Data Collection) and Advanced layout properties (see section 7.2.3.10 Question Properties) will only work in Internet Explorer 5.0 or higher. The survey will still work in all other browsers, but it will have a different look and feel.

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 Company:

- AOL 4, 6, 8, and AOL webmail on a Windows 2000 platform. We sent out e-mail invitations 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

Table 3: 3rd party downloads

2 Starting Confirmit – a General Overview

2.1 Confirmit Login

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 Confirmit Company’s home page, <http://www.confirmit.com/>.

Accessing this link will make your browser request a user name and a password, see Figure 1: Login box. Enter your personal user name and password, and you will be logged on. 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.

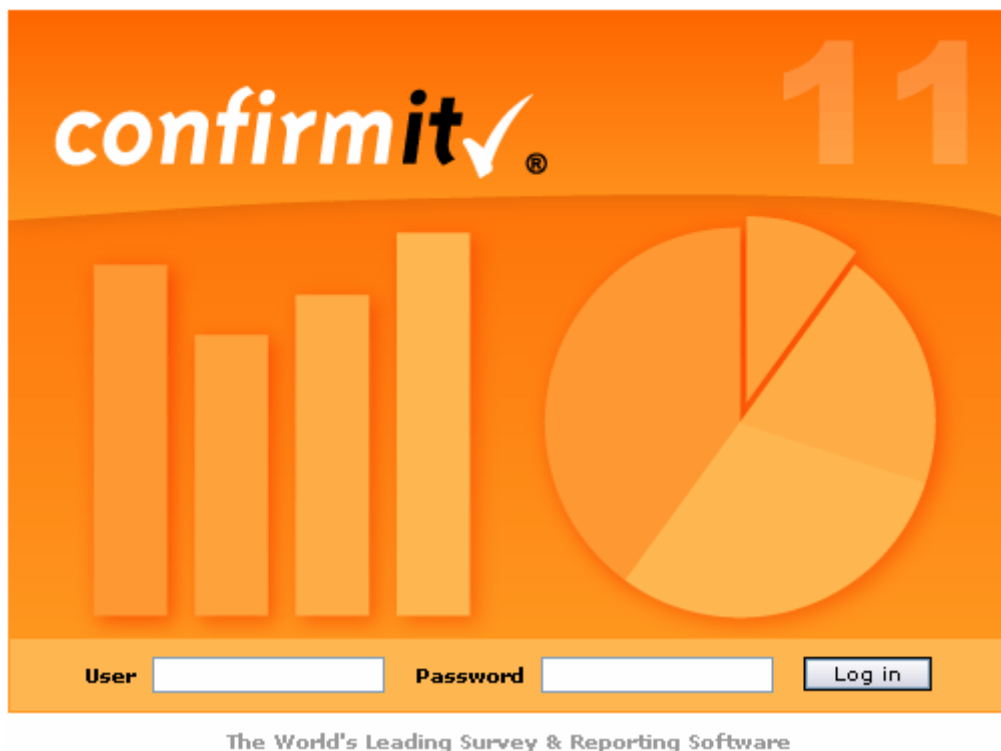


Figure 1: Login box

When a user attempts to access the login-page with an incorrect username/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 get 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 screen displayed in Figure 2 opens.

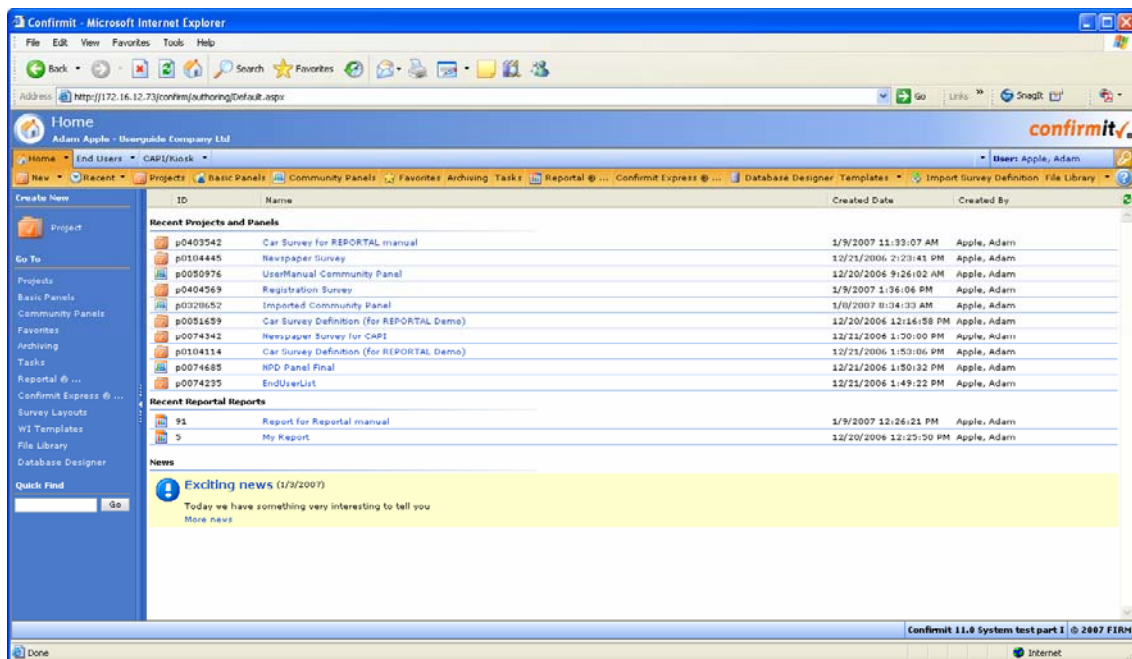


Figure 2: Example of a Home page for Advanced users

Standard users will enter a slightly different opening page:

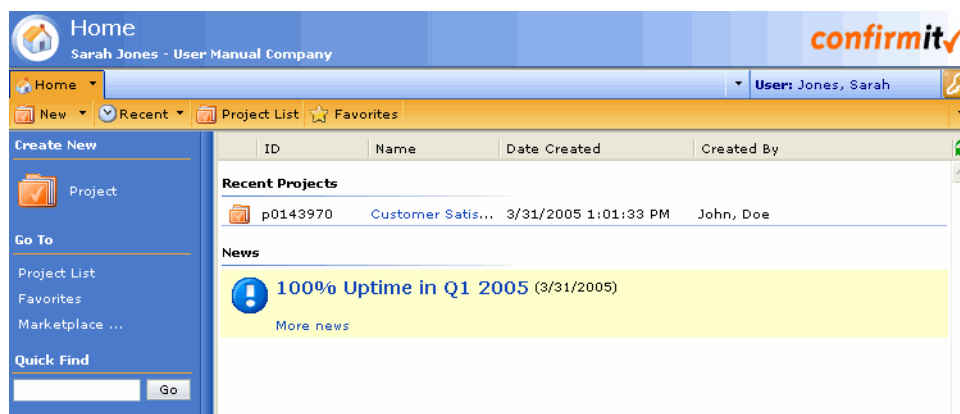


Figure 3: Example of a Home page for Standard users

The following sections offer a more detailed description of how to work in Confirmit, and a detailed description of every section and functionality in the menu. This manual will concentrate on the Advanced user interface.

2.2 Getting Help

2.2.1 Online Videos

Several key functionality areas in Confirmit are explained through online videos that are integrated in the application. The videos are available through a video icon  at various locations in Confirmit.

Note: 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 includes online help. Direct linking to relevant help articles in the User Manual is included in various parts of the application. Click the question mark icon in the upper right corner of the page to open the HTML help file at the section relevant to the current window. Note that the Contents frame will not be available in the window that opens, but you will be able to navigate backwards and forwards in the document.

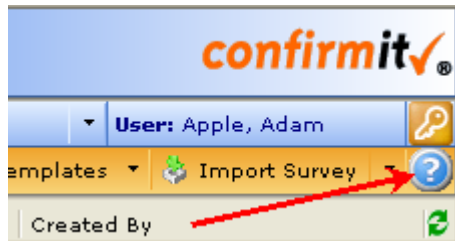


Figure 4: The Help button

To open the full manual in .CHM format, go to the **Home > Help > Help Topics** menu command, click the **User Manual** link, then click the link to the required manual.

2.2.3 The Help Information Page

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

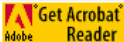
Confirmit Help		
Support	User Manual	Layout
About help: This area provides access to the User Manual, in addition to selected Help Functions and information about our Support Service. It will only be updated in connection with system updates. More complete and up-to-date Help is available on our Customer Extranet. Support: Find out about our Support Service. Layout: Links to useful HTML layout tools. User Manual (*): This is the official Confirmit User documentation. It is indexed, searchable, and has internal linking (e.g. click on a topic in the Table of Contents to go directly to the topic). (*) The User Manual is in PDF format and requires the Adobe Acrobat Reader plug-in to be installed in your browser. Download this free of charge from Adobe's homepage by clicking on the icon below. 		

Figure 5: The Help Information window

From here you can go to the Support Information page, open the Authoring and Reportal user manuals, and access some useful layout tools.

3 Working in Confirmit

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

3.1 Menus

3.1.1 The Home Menu

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

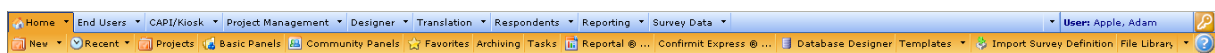


Figure 6: The Home menu

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.

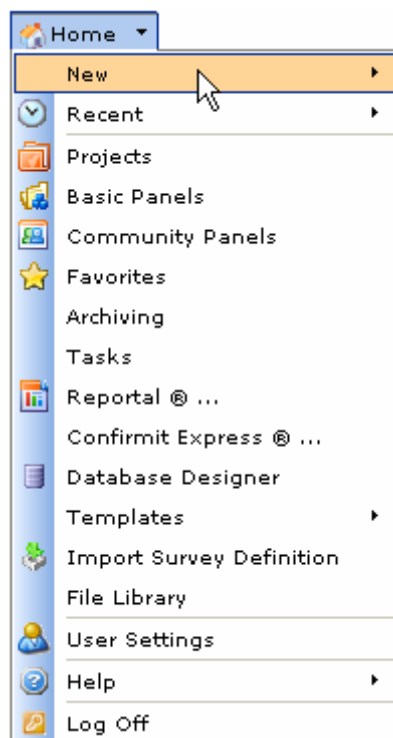


Figure 7: The Home drop-down menu

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

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

3.1.2 Project/Panel Menu

Once you choose a project or a panel, more menu buttons will be displayed in the main menu bar.

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.

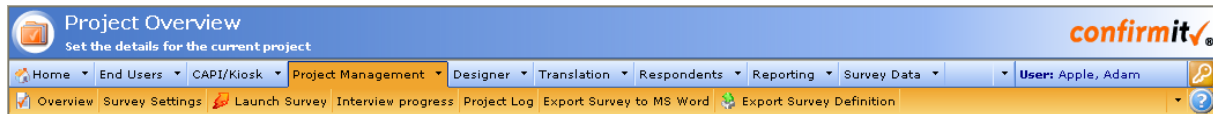


Figure 8: The Project Management menu

The Project Management menu will be activated, and the Overview page will be displayed.

When you enter a panel, the Panel Management menu will be activated. It will differ slightly from the Project Management menu because it will also include panel-specific menu items.

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

3.2 Toolboxes

The toolboxes that appear on the left side in the Professional Designer are displayed and available throughout the process of creating and editing a questionnaire. In the toolboxes, you have access to the current questionnaire, the objects that can be used in questionnaires, and other projects from which you may want to copy questions to the current questionnaire.

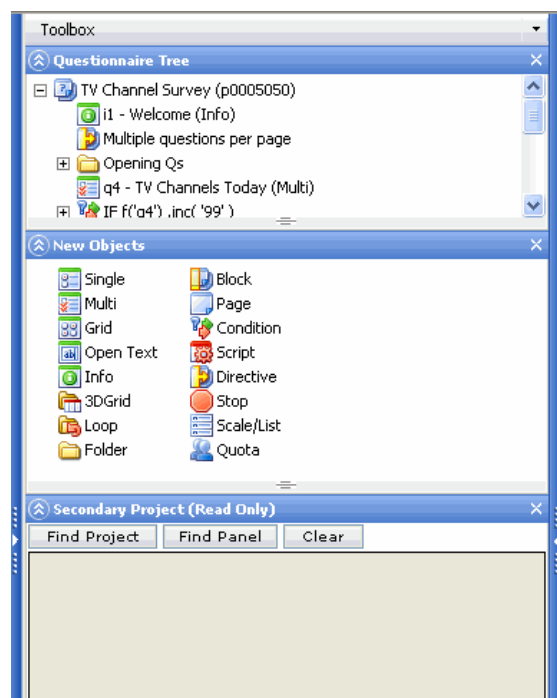


Figure 9: Toolboxes

Click on the dropdown arrow in the upper right corner of the toolbox panel to open a menu where you can add or remove the items from the toolbox, when necessary. Alternatively, you can hide the items by clicking the button in the upper right corner of each item.

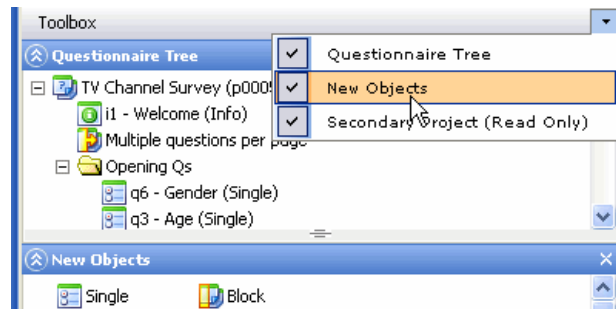


Figure 10: Removing toolboxes

As shown in the picture below, the items in the Toolbox can also be collapsed by clicking the arrows in the upper left corner of each item. In the example, the New Objects and Secondary Project items have been collapsed. They can be expanded again by clicking once more on the expand button.

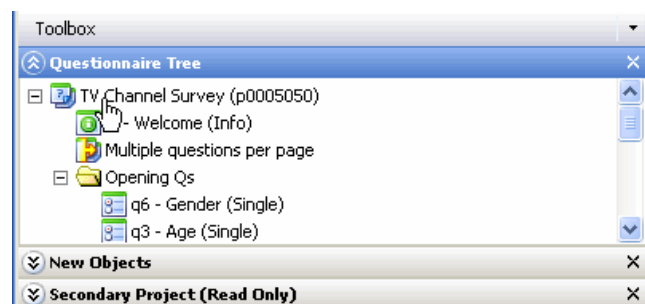


Figure 11: Collapse toolboxes

You can rearrange the toolbox items by clicking and holding the mouse pointer on the blue bar, then dragging the item to the desired location. In the picture below, the New Objects item is being moved:

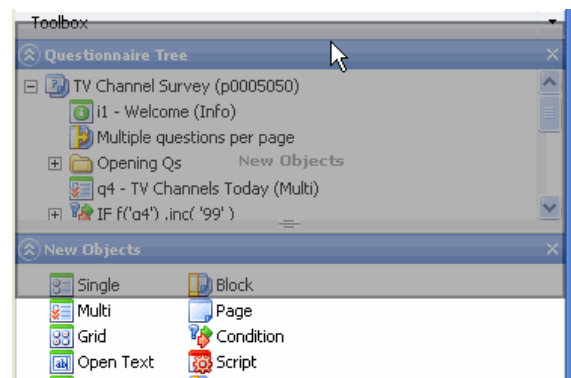


Figure 12: Rearranging Toolboxes

You can also resize the toolboxes by using the window shade feature found at the bottom of each item.

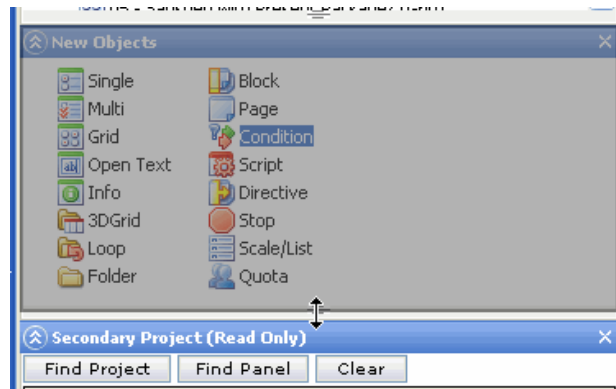


Figure 13: Resizing Toolboxes

All objects in Questionnaire Tree, can be edited by either double-clicking on them or right-clicking and choosing Properties or Edit from the menu.

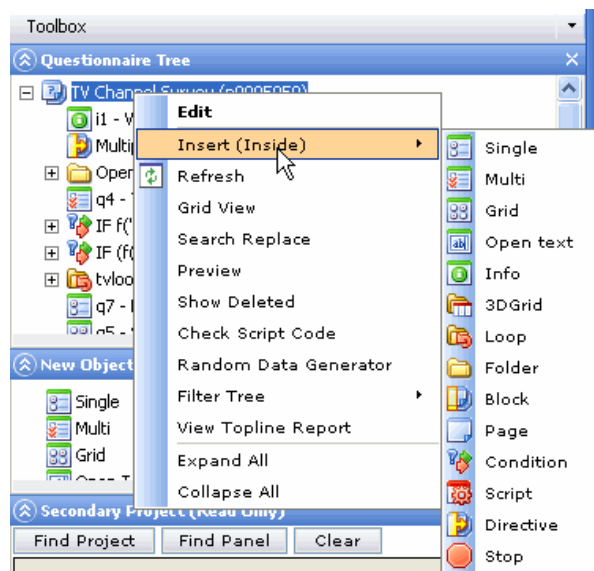


Figure 14: Project menu

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

Edit: Will open the editor page of an object.

Insert (After): Will display a new menu with all items from the New Objects toolbox. You can select an object from this menu, and it will be inserted after the object that you right-clicked.

Insert (Inside): Appears when you right-click folders. Will display a new menu with all items from the New Objects toolbox. You can select an object from this menu, and it will be inserted after the object that you right-clicked.

Refresh: Will refresh the Questionnaire Tree to reflect the recent changes.

Grid View: Will open the Grid View configuration page.

Search Replace: Will open the Grid View configuration page for Search/Replace.

Preview: Will show the entire questionnaire in Preview.

Show Deleted: Will show the soft deleted nodes.

Check Script Code: Will check scripts, validation codes, masking codes, conditional expressions in the questionnaire. A list of errors 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. See section 13.3 Check Script Code. Note that you DO NOT have to compile or generate to use this feature.

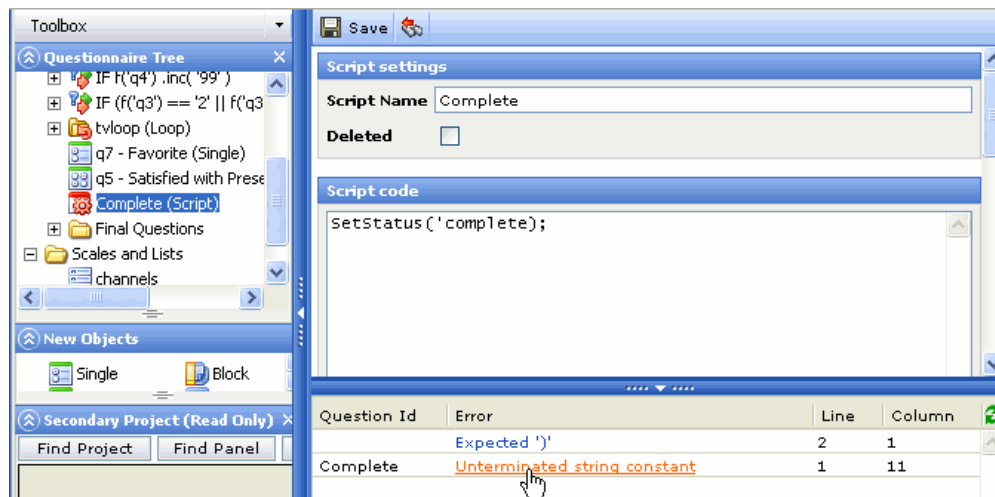


Figure 15: Check script code

Random Data Generator: Will open the Random Data Generator page. See section 13.1 Random Data Generator.

Filter Tree: Will display 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: The topline report for the questionnaire item will be displayed. See chapter 18 Rapid Results.

Expand All: Will expand all folders and conditional expressions.

Collapse All: Will collapse all folders and conditional expressions.

Spell Check: Will open the Spell Checker for the question.

Some of the objects in the Secondary Project (see section 7.4 Secondary Project) toolbox can be right-clicked to display an action menu.

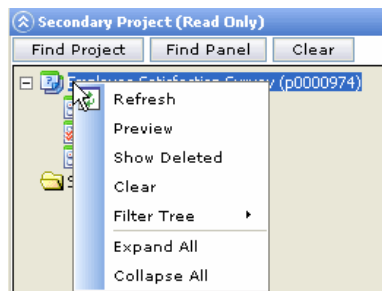


Figure 16: Menu in secondary projects

3.3 Drag-n-Drop Operations

In Confirm, most objects can be moved to different destinations by the drag-n-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.

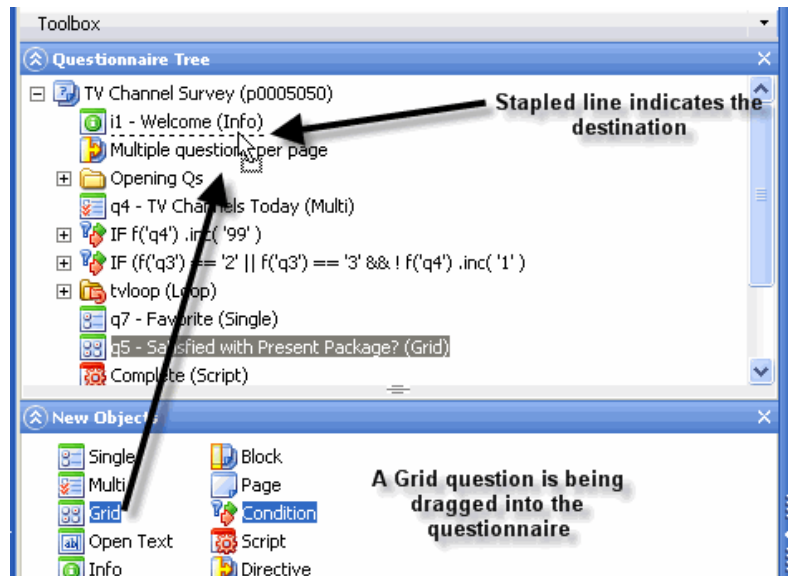


Figure 17: Drag-n-Drop operations

The stapled line will indicate where the item will be dropped.

When inserting items into folders, mostly the item that is supposed to be the first item in the folder, you will have to point the mouse pointer at the folder, 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 stapled line is displayed underlining the folder, and then drop the item.

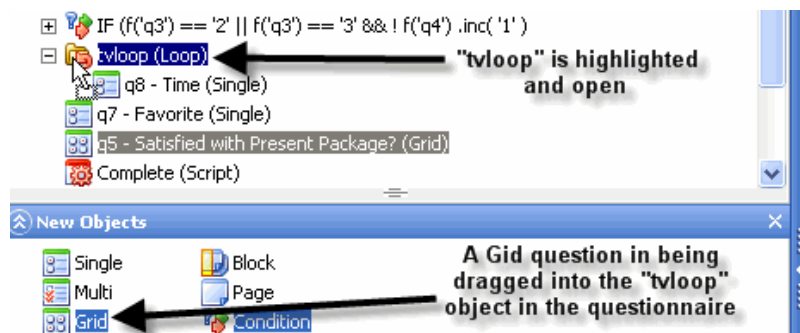


Figure 18: Drag-n-drop into folder

In Online Reporting, when building reports, the drag-n-drop method will function slightly differently (as in Confirmit 8.5). You will have to drop the object on the item after which you want to place it, the destination item should be highlighted in red.

3.4 Keyboard Shortcuts

You can use keyboard shortcuts for copy (Ctrl-C), cut (Ctrl-X) and paste (Ctrl-V) as well as arrow buttons (up, down, left, and right) in the questionnaire tree in Professional Designer. Right and Left buttons will expand/collapse folders, loops, conditions etc.

3.5 Property Sheets

Most objects in the Questionnaire Tree toolbox have a wide range of properties and settings that can be customized by using the property sheets that appear when you right-click an object and choose Properties, or double-click an object, and click the "Toggle the properties for this question" button if the Property sheet is not already displayed. The property sheet will always display the type and name/title of the active object.

Single Question - (q6)	
List rows	
List columns	
Field width	
Drop down	☐
Indexed	☐
Answers	Normal answerlist
Answer list display order	Randomized
Group display order	In order
Variable type	Normal
Not required	☒
Read only	☐
Exclude translation	☐
Deleted	☐

Figure 19: Property sheet for a single question

The properties will be explained in more detail in section 7.2.3.10 Question Properties.

3.6 Frames and Panes

When working in a questionnaire, the Confirmit screen can be divided in 5 frames, some of them opened in panes that can be closed and opened at all times. The picture below illustrates this division.

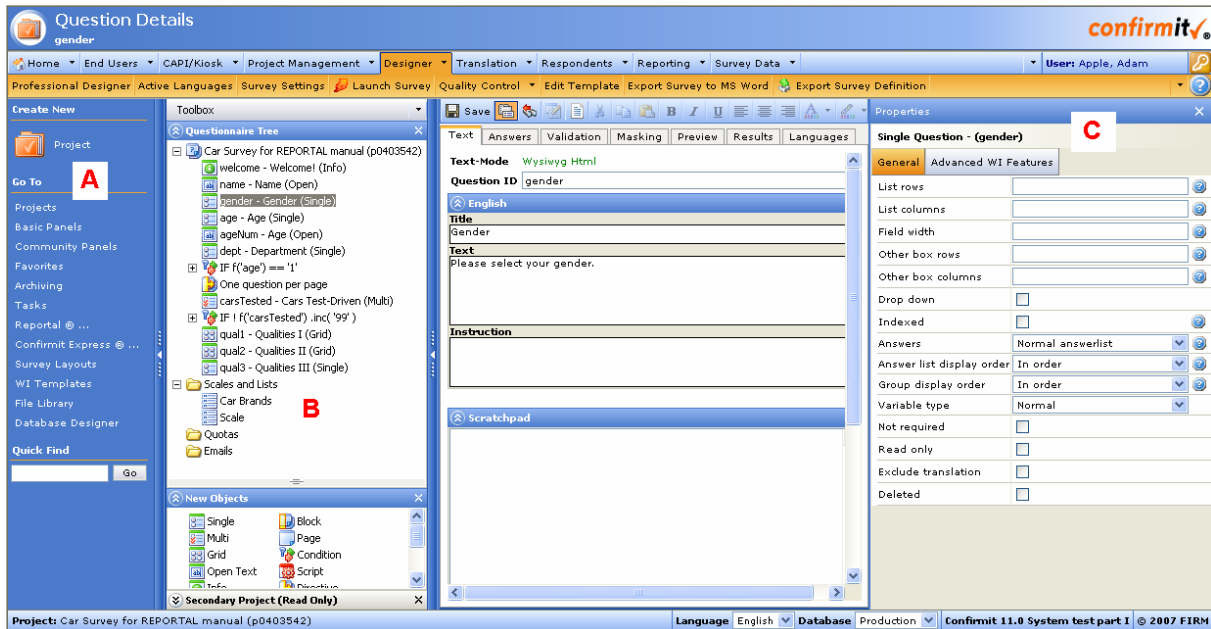


Figure 20: Panes and frames in Confirmit

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.

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.

In questionnaire tree in Professional designer, you can right-click and select Check Script code to validate all script code without generating WI. The list of errors will be displayed in the **Script Validation pane**. Each error can be double-clicked to open the item with the error for inspection and modification.

The **Properties Frame (C)** 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.

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.

When you are using the WYSIWYG editor, you will be able to format the text by using the buttons in the formatting toolbar. In the picture below you see that the text "Specify your gender" is displayed in red and bold Verdana font.

**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.**

3.7.1 Text

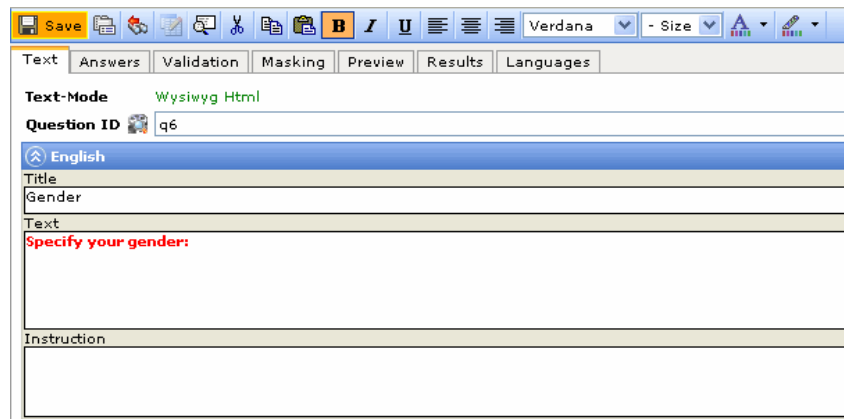


Figure 21: WYSIWYG editor

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

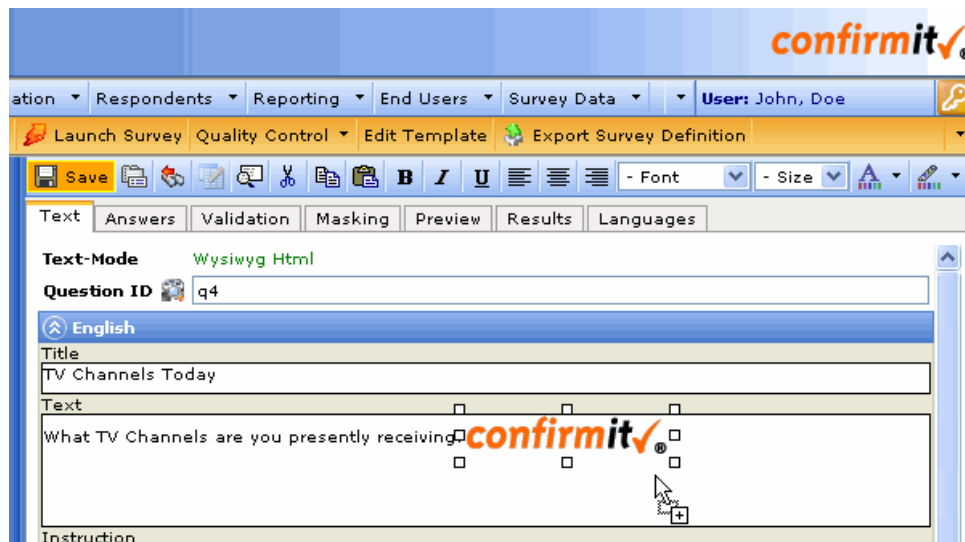


Figure 22: Dragging logo into textfield

When you are using the HTML (Plain Text) editor, you will have to use HTML code in the textfields to format the text. If you toggle the picture above to the HTML (Plain Text) mode, you will get the following picture displayed. Note that the WYSIWYG formatting toolbar is inactive.

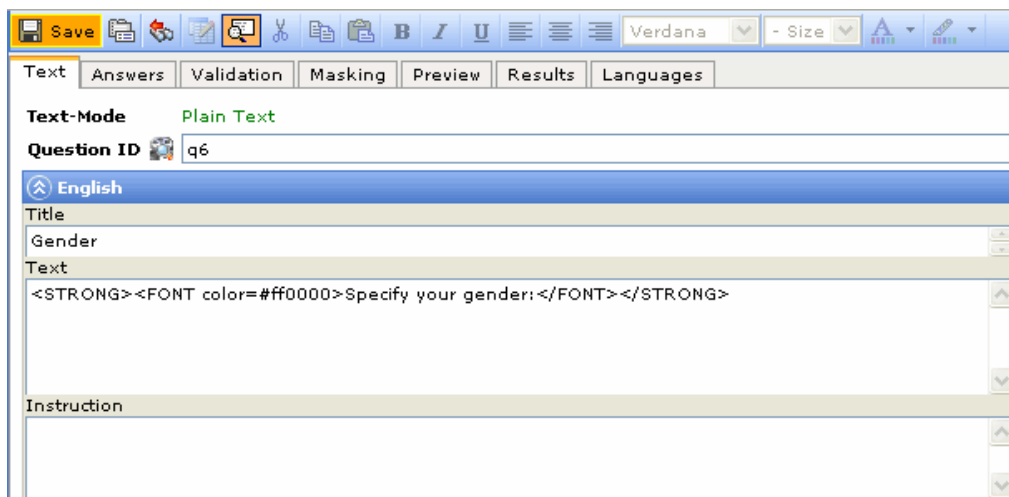


Figure 23: HTML editor

In Answers, the WYSIWYG editor will be available when using the DHTML answerlist (see explanation below). The Save button will be blinking, indicating that you must save the changes.

3.7.2 Answerlists and Scales/Lists

When editing Answerlist and Scales/Lists you can choose between two editing modes: the **ActiveX answerlist** (requires to download an ActiveX plug-in), and the **DHTML answerlist**.

The ActiveX answerlist is the answerlist that has always been used in Confirmit. This will be the default answerlist if the user's browser supports ActiveX. If the user's browser does not support ActiveX, a warning will be displayed and the user will have a choice of either downloading the ActiveX FlexiGrid component, or switching to the other mode – DHTML mode.

ActiveX input mode supports long answerlists. However, if the answerlist contains several hundred items, we would recommend using the Table lookup functionality that Database Designer offers. See chapter 9.

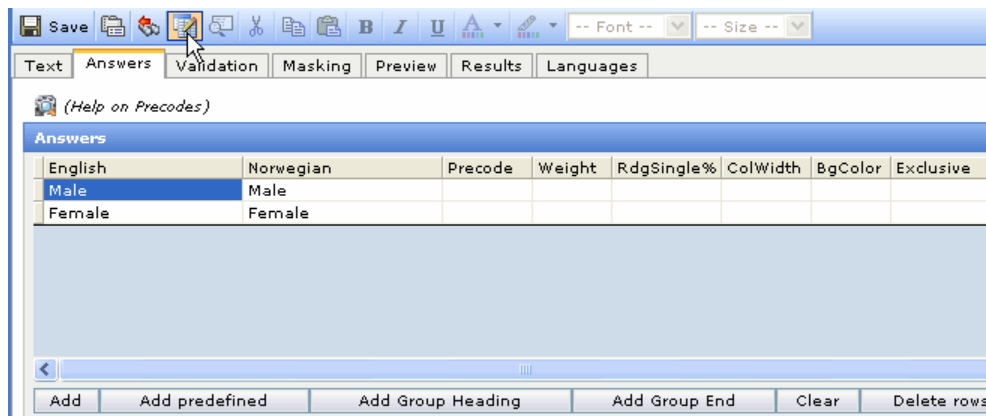


Figure 24: FlexiGrid answer list

The DHTML answer list does not require any plug-in downloads. The only difference between performance of this answer list and the performance of the ActiveX answer list is that when you paste in longer answer lists 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: The maximum number of items in an answer list is 100. An error message will be displayed if you attempt to add more.

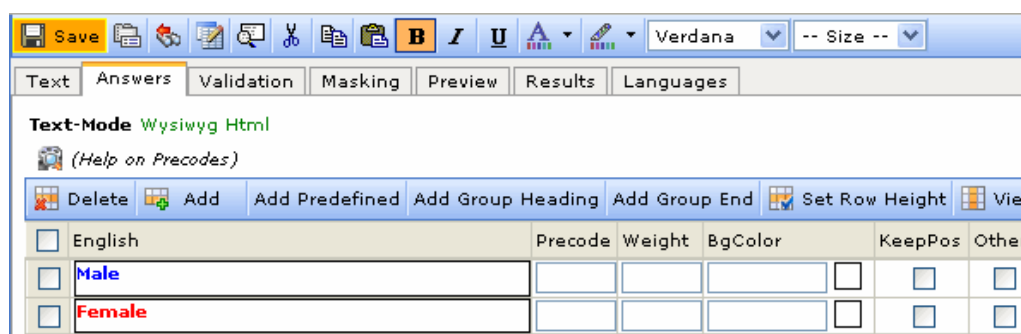


Figure 25: DHTML answerlist

In the picture above the DHTML answerlist and WYSIWYG editing mode are selected. If you want to remove some of the columns, for example, Weight, you can open the View dropdown and unselect this row.

To copy and paste several elements from the DHTMLanswerlist 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 answerlist, use right-click > Paste or Ctrl-V.

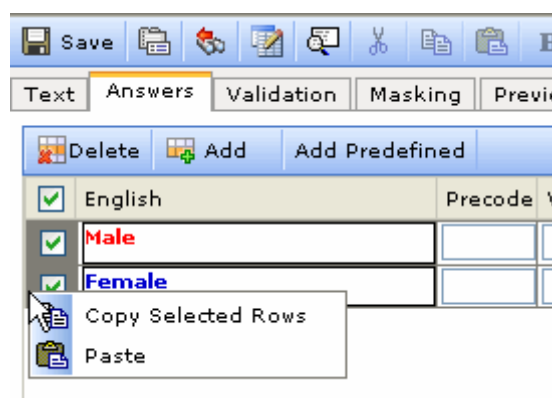


Figure 26: Copying rows in DHTML answerlist

For more details about answerlists and answerlist properties see section 7.2.3.3 Answers.

Set Row Height will open a pop-up window in which you will be able to define the height of the answer cell in edit mode.

3.8 Language and Database Modes

When working with projects in Confirmit, you will always be able to switch between the Test and Production modes, as well as select the default project language in multilingual projects.

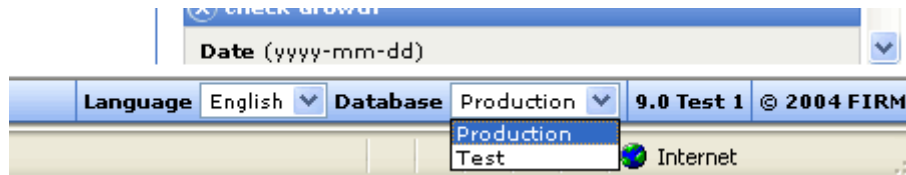


Figure 27: Language and database modes

In Launch Survey, Survey Settings, etc. the system will at all times show with which database you are working.

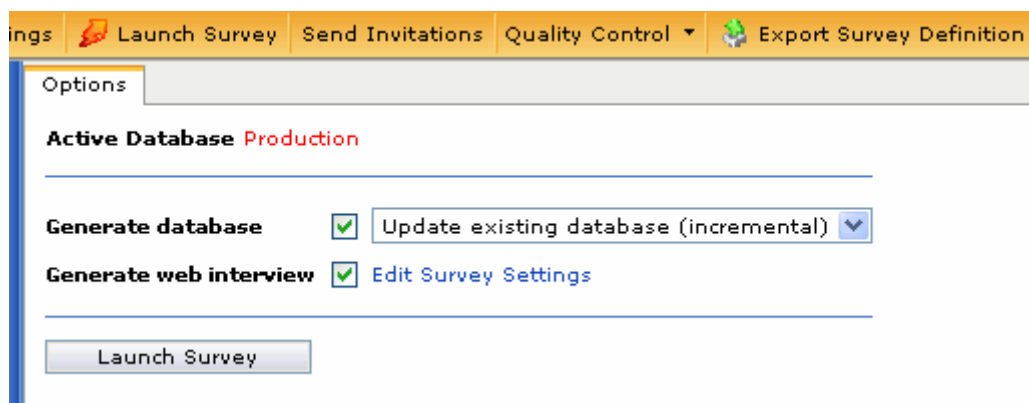


Figure 28: Active database

3.9 Search Lists

In Confirmit, 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. The Task search list is slightly different and will be described in more detail in section 4.9 Task.

The following picture shows the Project search list:

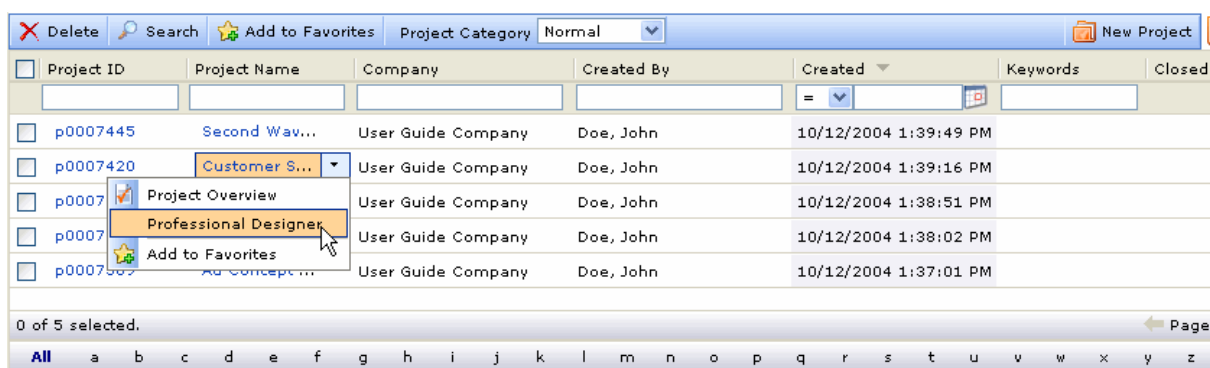


Figure 29: Search lists

At the top of Search Options, you can 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. In the search below, all projects with the string "satisfaction" in them, are returned.

Delete	Search	Add to Favorites	Project Category	Normal
☐ Project ID	Project Name	Company	Created By	Created
	*satisfaction			=
☐ p0007445	Second Wave Customer Satisfac...	User Guide Company	Doe, John	10/12/2004 1:39:49 PM
☐ p0007420	Customer Satisfaction Survey	User Guide Company	Doe, John	10/12/2004 1:39:16 PM
☐ p0007383	Employee Satisfaction Survey	User Guide Company	Doe, John	10/12/2004 1:38:51 PM

Figure 30: 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. Clicking on a project name will bring you to the Overview page of the project. If you click on the dropdown 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, you can 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 by checking the check-box next to them and pressing the "Add to Favorites" button. 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.

Clicking on the alphabet items will return projects which name starts with the letter on which you clicked.

In the Project Category dropdown 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 want 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 under “Home” in the 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.

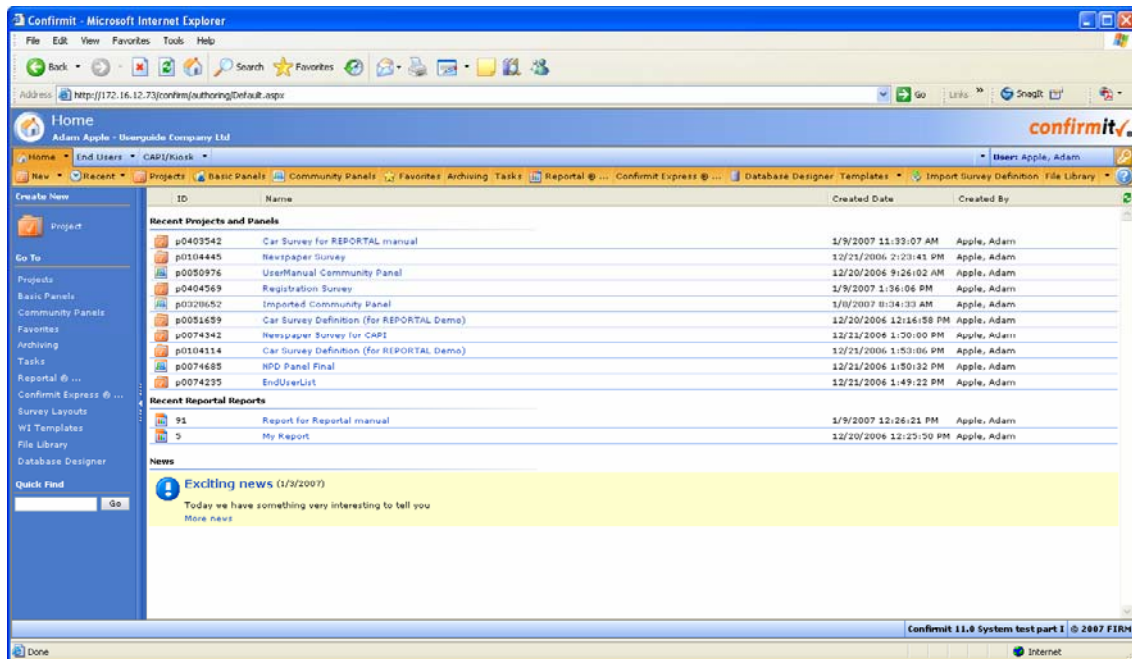


Figure 31: The Confirmit Welcome page

Under **Recent Projects and Panels**, the 10 last projects with which you have been working will be displayed.

Under **Recent Reportal Reports**, the 10 last accessed Reportal reports will be displayed. Clicking a report link will open the Reportal and the report in edit mode.

In **News**, the latest news related to the current server will be 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 illustration below may not be available in your menu as they are Add-ons and will be subject to payment.

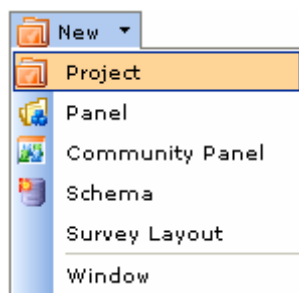


Figure 32: The New menu

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

4.3 Recent

Click **Recent** to display the 10 most recently accessed projects and panels in a dropdown. Click on the desired project or a panel to open it.

4.4 Projects

Click **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. For more information concerning searches, etc., see section 3.9 Search Lists.

4.5 Basic Panels

Click **Basic Panels** to display a list of your panels and the panels to which you have been granted access by other Confirmit users. For further information concerning Basic Panels, refer to section 16 Basic Panels. For more information about searches, etc., see section 3.9 Search Lists.

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.

Click **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.

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. You can add projects to Favorites from the project/panel list. For more details see section 3.9 Search Lists.

4.8 Archiving

The Archiving functionality allows you to store projects that are inactive.

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

Click on the **Archiving > List** menu option to display the Survey list page:

p0011200

Name	Project id	Created	Creator	Customer	Expire	Email recipient	Archived	Panel
*							No	Search
Example Survey	p0011200	24. mai 2002	Manual, User	UserManual	10.jun.02	usermanual@firmglobal.com		
Example Survey	p0011586	24. mai 2002	Manual, User	UserManual				

Details

Project archiving details

Project id

Email recipient

Expiry date (yyyy/mm/dd)

Do not expire ☐

Figure 33: Survey List in Archiving

As shown in the picture above, the user has searched for all projects available to him by entering an asterisk in the Name field.

Confirmit users will be able to view projects that they have at least *Read* permissions to.

To search for specific projects, you may enter values into the fields in the *Search*-row, and click the *Search* button. The page will then be refreshed and will display projects according to the search criteria. The criteria will remain in the *Search*-row.

The *Expires* criteria will search for projects expiring in the future according to the chosen option.

To search for projects that have been archived, change the value in the *Archived* dropdown to Yes and click the *Search* button. The same search criteria will work for archived projects. The *Expires* criteria will search "backwards" according to the chosen option.

Clicking one of the projects in the list will display the Project archiving details for this project. The project administrator will be able to modify some of the information.

Name	Project id	Created	Creator	Customer	Expire	Email recipient	Archived	Panel
*							No	Search
Example Survey	p0011200	24. mai 2002	Manual, User	UserManual	10.jun.02	usermanual@firmglobal.com		
Example Survey	p0011586	24. mai 2002	Manual, User	UserManual				

Example Survey

Details

Project archiving details

Project id

Email recipient

Expiry date (yyyy/mm/dd)

Do not expire ☐

Figure 34: Project Details for Project Administrators

Project administrators will be able to update the *Email recipient* field (by default project administrators/creators), and they will be able to extend the Expiry date by 7 days at a time if the expiry date has been calculated by the system and not manually entered by the system administrator.

Figure 35: Delay by 7 Days Box

The Project ID, Expiry date, and Do not expire fields will always be locked.

The project administrator will not be able to extend the expiry date by seven days if:

1. The date has already been extended (the checkbox will be activated after 7 days again)
2. The expiry date is blank
3. The system administrator has set the expiry date for the project manually.

Users who have only *Read* permissions will not be able to modify any data in the Archiving list.

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.

The task management page has six tabs:

- **Queued tasks** – A list of the user's pending tasks.
- **Executing tasks** – Task currently being run on the batch server.
- **Aborted tasks** – Tasks that for some reason did not finish within the specified timeframe.
- **Completed tasks** – Tasks that did finish within the specified timeframe.
- **Recurring tasks** – Tasks that have been scheduled to recur at specified time intervals.
- **Search tasks** – Here you can search for your batch job to check its status. You can search by various parameters:
 - **Task ID** - the ID number given to the batch job by the system.
 - **Project ID** - the system generated project number.
 - **Schedule** - You can filter tasks based on the schedule date. Various formats of date input are allowed: '11/20/2003', '20 November, 2003', '11.20.2003 14:45:23', etc.
 - **Status** - Any, in queue, executing, completed, aborted by user, and aborted by system.
 - **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.

Queue Executing Completed Aborted Recurring Search

Search tasks

Disable

Task ID	Project ID	Schedule	Status	Task type	Comment	Recurr
		(Any)	Completed	(Any)		(Any)
63	p0007420	< 2 17:49:48 UTC+0200 2004	Completed	Random Data Generator		No
62	p0007420	> 2 17:19:11 UTC+0200 2004	Completed	Random Data Generator		No
54	p0007420	<= 2 15:56:22 UTC+0200 2004	Completed	Launch Survey	Launch Survey	No
49	p0007420	= 2 13:59:40 UTC+0200 2004	Completed	Launch Survey	Launch Survey	No

Figure 36: Example of the Task Management pane

Click on the **Task ID** number to go to the Task Instance Properties overview. Here is displayed information about the particular job's Schedule, Status, percentage completed, Start time and End time, and the time used to perform the task. Go to the **Log entries** tab to view a complete overview for the job.

Click on the **Task Definition** button to get an overview of the Recurrence pattern for the job. To edit this, click the **Change** button on the Recurrence pattern page.

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. To do this, tick the check-box next to the task and click **Disable**.

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 Task Definition Parameters

In task parameters you will find the information about the settings with which the task was set up, for example, you can change the task parameters for batch emailing task instances. The interface is identical with step 1 in the "Emailing" setup under the "Respondents" menu. You will find it under "Task definition":

Figure 37: Task definition parameters

This is useful when you for example want to set up the batch emailing as a recurring task. In order to change the parameters from time to time, you can edit them in this interface. The next recurrence will be sent with the applied changes.

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: `<img ... />` and `<br />`.
- Attribute minimization (for example, `<option selected>`) is prohibited; instead, use `<option selected="selected">`.

Using Survey Layouts provides many advantages:

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

4.10.1.1 Extensibility

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

4.10.1.2 Cleaner, More Logical Markup

XHTML brings uniformity to document structure. It delivers a standardized markup that separates display and layout code from syntax, making the creation, maintenance, and parsing 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 like Microsoft Internet Explorer, Netscape Navigator, and Opera Software’s Opera browser.

4.10.1.4 Greater Accessibility

Because they follow strict rules and avoid non-standard markup, well-authored XHTML pages are more accessible than the old-style HTML pages. This helps you to comply with regulations and accessibility guidelines.

Web accessibility means that people with disabilities can 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 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**.

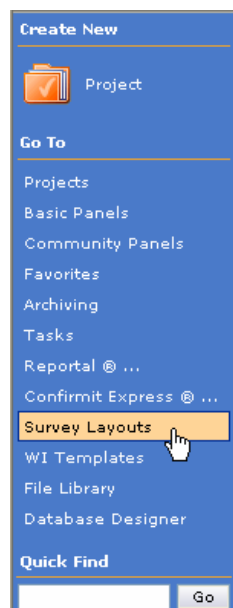


Figure 38: Choose Survey Layouts on the Quick Access Pane

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

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

☐ Delete Search				Import Survey Layout	New Survey Layout
☐ Name	Company	Created By	Created		
☐ Public Survey Layout - E1 - Red Orange Bold	FIRM AS	Oksendal, Kjell	11/16/2005 3:50:25 PM		
☐ Public Survey Layout - D2 - Light Blue Tech Theme - Centered Navigation	FIRM AS	Oksendal, Kjell	11/16/2005 3:49:59 PM		
☐ Public Survey Layout - D1 - Light Blue Tech Theme	FIRM AS	Oksendal, Kjell	11/16/2005 3:49:39 PM		
☐ Public Survey Layout - C1 - White Clean Theme	FIRM AS	Oksendal, Kjell	11/16/2005 3:49:18 PM		
☐ Public Survey Layout - B1 - Brown Classic Theme	FIRM AS	Oksendal, Kjell	11/16/2005 3:48:42 PM		
☐ Public Survey Layout - A1 - Green and Orange Themes	FIRM AS	Oksendal, Kjell	11/16/2005 3:48:19 PM		
☐ Confirmit Default Blue	FIRM AS	Myren, Pål	10/15/2005 9:28:34 AM		

Figure 39: 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.

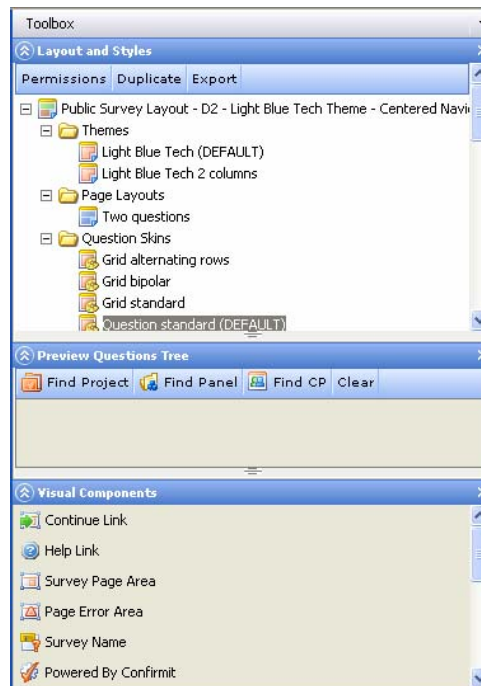


Figure 40: The Toolbox layout for a Global Survey Layout

Note: See section 4.4 Projects 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.

Save

Public ☐

Available in Confrimit Express ☐

Company Specific ☐

When enabled, this survey layout will ONLY be available to the users within the same company as the survey layout itself

Company Userguide Company Ltd

INFORMATION: Permission changes for other users will take effect at next login or within 5 minutes.

User ID	Last Name	First Name	-	R	W	D	Surveylayout Administrator
							Search
Users in company							
usermanual	Apple	Adam	☒	☐	☐	☐	☐
usermanual_admin	Apple	Adam	☐	☐	☐	☒	☒
Groups							
Other users							

[Add users] [Remove users]

Figure 41: 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 Confrimit 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 Confrimit Express** – check this box to make the layout available to your company's Confrimit Express users. When you check the box, an input field appears enabling you to add a URL to a preview for 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 Confrimit 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. Confrimit 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 you are in a project, you specify its survey layout under **Survey Settings**. If you are creating a new project, you specify the survey layout on the first page of the 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.

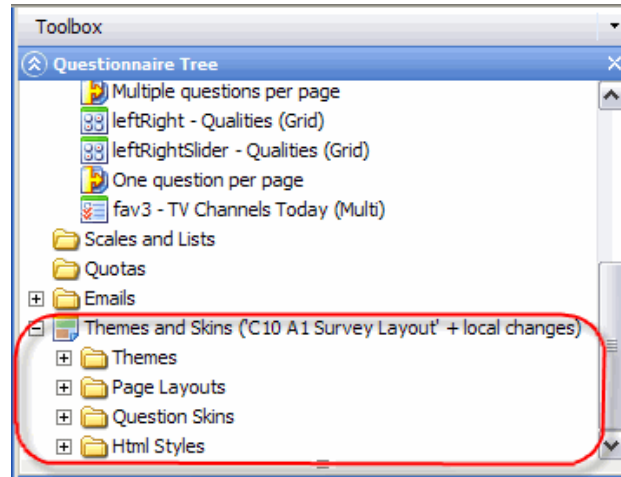


Figure 42: Direct access to Survey Layouts via the Questionnaire Tree

Confirmit indicates next to the **Themes and Skins** folder which global Survey Layout is currently used for the project. 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**.

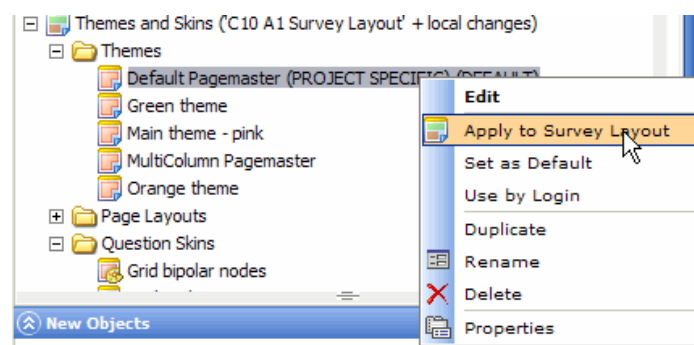


Figure 43: Applying a project-specific layout to Survey Layout

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 example below we have used an HTML table to determine the visual components' positioning on the page. You can instead specify positioning inside the Styles directly. The latter is recommended if you want your Survey Layout to support 100% accessibility requirements (for more details see section 4.10.1.4 Greater Accessibility).

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.

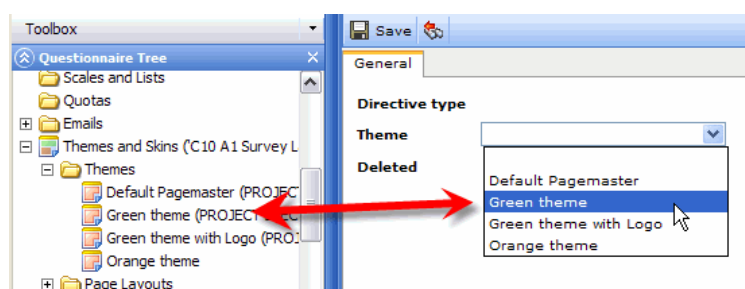


Figure 44: You can select the theme on Directives and Page objects

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 figure below.

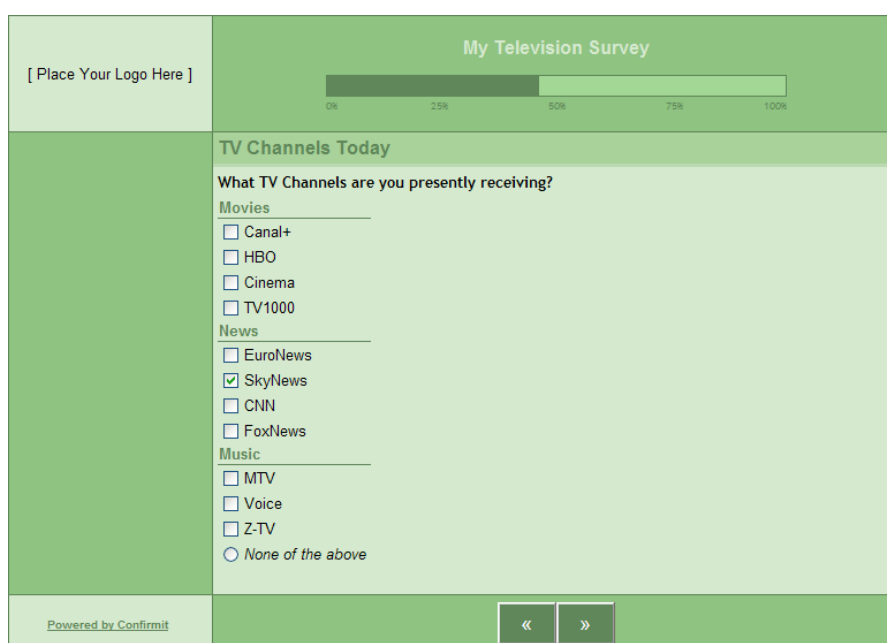


Figure 45: A multi question with the “Green theme”

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

My Television Survey

[Place Your Logo Here]

0% 25% 50% 75% 100%

TV Channels Today

What TV Channels are you presently receiving?

News

☐ CNN

☐ FoxNews

☐ SkyNews

☐ EuroNews

Movies

☐ Canal+

☐ HBO

☐ Cinema

☐ TV1000

Music

☐ MTV

☐ Z-TV

☐ Voice

☐ None of the above

Powered by ConfirmIt

« »

Figure 46: The 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 (see point 1 in figure below). ConfirmIt will always display **(DEFAULT)** after the current default theme (2). In the figure below Default Pagemaster is the default theme. However in this case if **Set as Default** is clicked the "Green theme" will become the default.

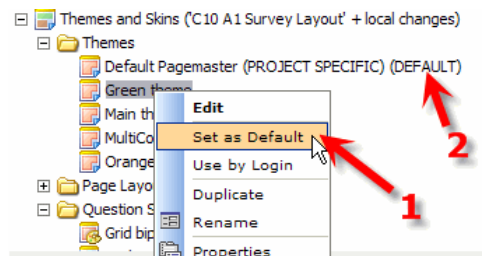


Figure 47: Setting a theme as Default

4.10.3.1.3 How to Edit a Theme

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

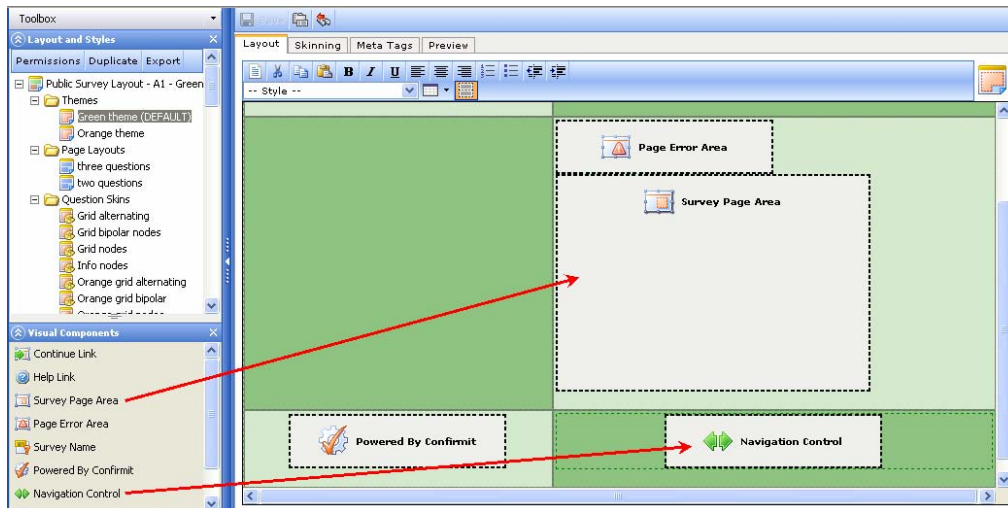


Figure 48: Editing a Theme

Edit the theme under the **Layout** tab by dragging-and-dropping elements from the Visual Components toolbox. There are eight different survey elements that can be placed on a survey page. Alternatively you can right-click anywhere on the page and choose **Insert Component** from the pop-up menu. The Layout tab lets you decide positioning for each of the survey elements you want to use. The figure above shows how two elements have been dragged-and-dropped on 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

There is one key component called **Survey Page Area**. This 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 (not 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 progressbar (except the bar itself) including the percentage numbers.
- **Bar Style Name** – specifies the style of the bar in the progressbar.
- **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, 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.

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

Figure 49: 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.

Name	Content
Copyright	FIRM

Figure 50: 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.

SurveyPageMaster - Green theme	
Document Type	XHTML 1.0 Transitional
External Stylesheet Url	
External Javascript Url	
Title Text	
Body Style Name	body
Body Attributes	link=\"#60875A\" vlink=\"#60875\"
Page Area Columns	0
Vertical Column Population	☐
Default 'Powered By Confirmit' Style	poweredby

Figure 51: 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 seeing 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 or right-click and choose **Edit**.

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").

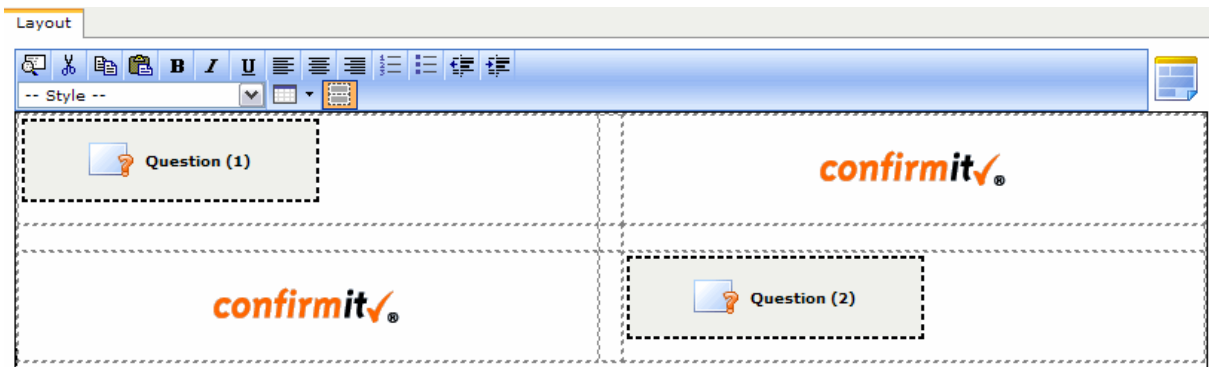


Figure 52: Example of the Page Layout

Among the Visual Components available for Page Layouts is one called “Question”. This element works 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

Very often you will want the questions to have the same look and feel throughout the survey. Should you wish to display one or more questions differently, you can set up different **Question Skins**. You then apply a specific Skin to a specific question under the properties for that question. If no specific Question Skin is specified in the question properties, the question will follow the look and feel set up in Skinning (the default look).

4.10.3.3.1 How to Edit a Question Skin

To edit a Question Skin, double-click on its name or right-click on it and choose **Edit**.

Determine the positioning of the question elements for each Question Skin under the **Layout** tab. Drag-and-drop elements from the “Visual Components” toolbox into the desired locations. In the example below, the question elements are being placed underneath each other on a white background.

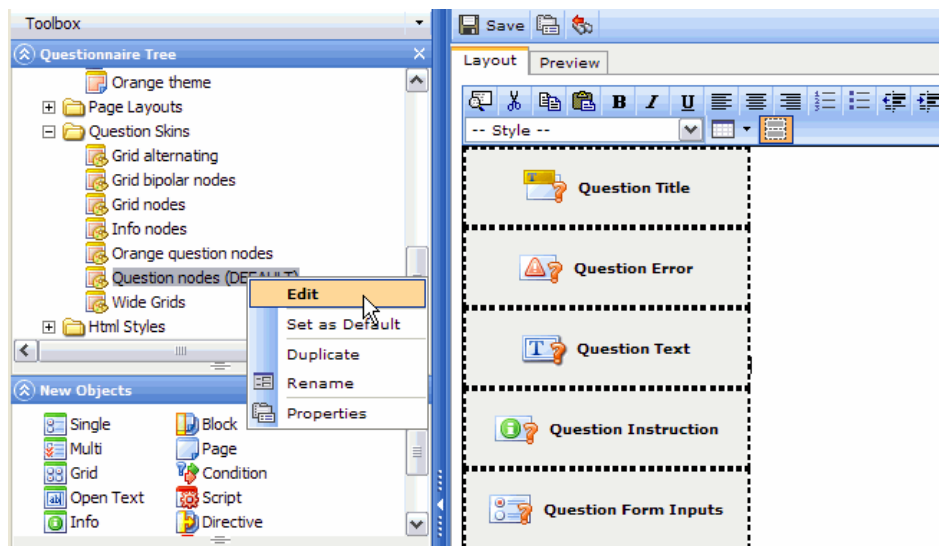


Figure 53: Editing a Question Skin

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, double-click on a question element (or right-click and choose **Edit**) to change the HTML style for that element.

4.10.3.3.2 How to Edit the Question Elements

Right-click the elements and choose **Properties** (or double-click on the element) to change or alter the HTML style each element is based on (See point 1 in the figure below). In the example, note that in the properties for the Question Error element, the HTML style for that element is called "error". The definition of the style is stored in the node **error** inside the folder "HTML Styles" (2).

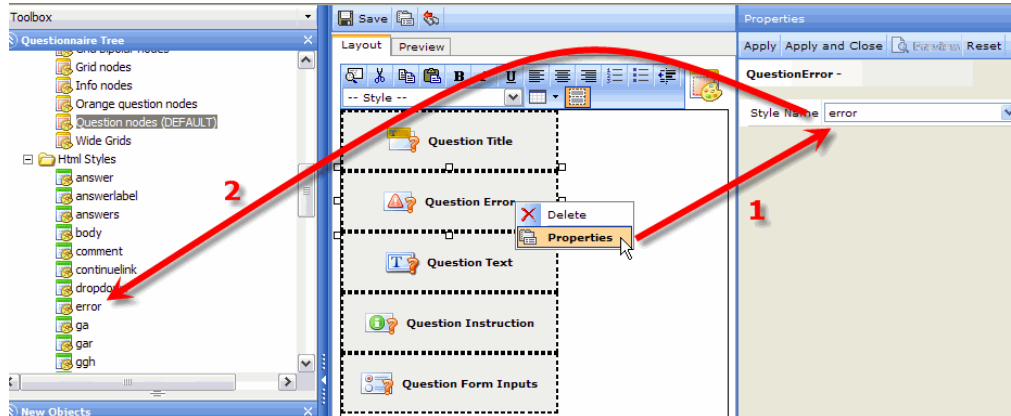


Figure 54: Editing a Question Element

4.10.3.4 HTML Styles

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

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

<http://www.msdn.microsoft.com/library/default.asp?url=/workshop/author/dhtml/reference/objects/div.asp>

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>

4.10.3.4.1 Working on an HTML Style

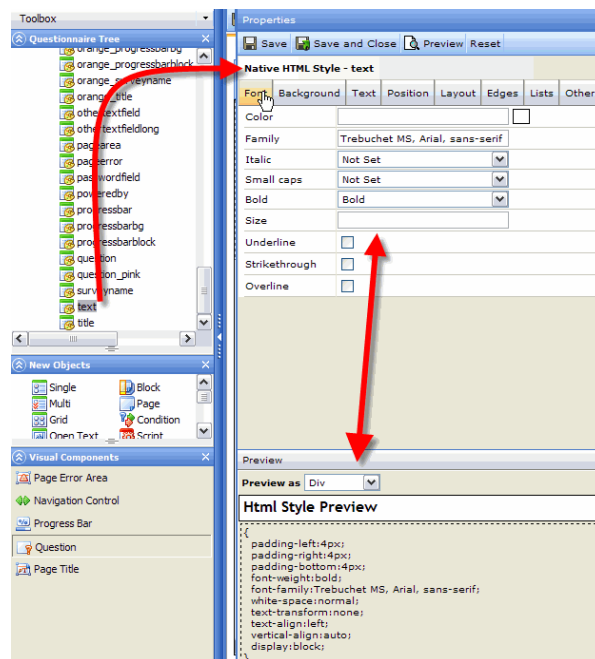


Figure 55: Working with HTML Styles

Double-click on a style (or right-click and choose **Edit**) to change a style definition. 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. On every style are settings in the following areas: Font, Background, Text, Position, Layout, Edges, Lists, Other.

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 working inside your questions you may want to change the current theme, question skin, or style. Confiormit provides many shortcuts directly into the areas where you need to go. When previewing a question inside the Questionnaire Tree you have direct access to both the current Theme and Question Skin.

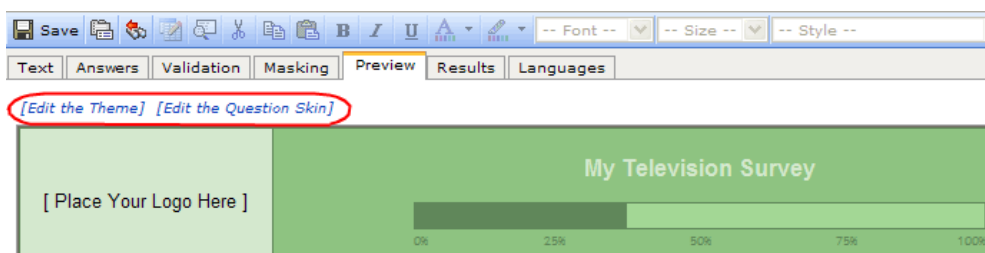


Figure 56: Shortcuts from Question Preview

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

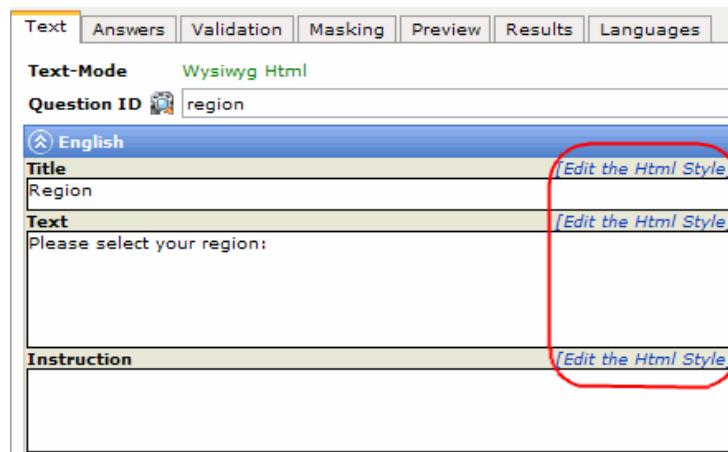


Figure 57: Shortcuts from Question Texts

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.

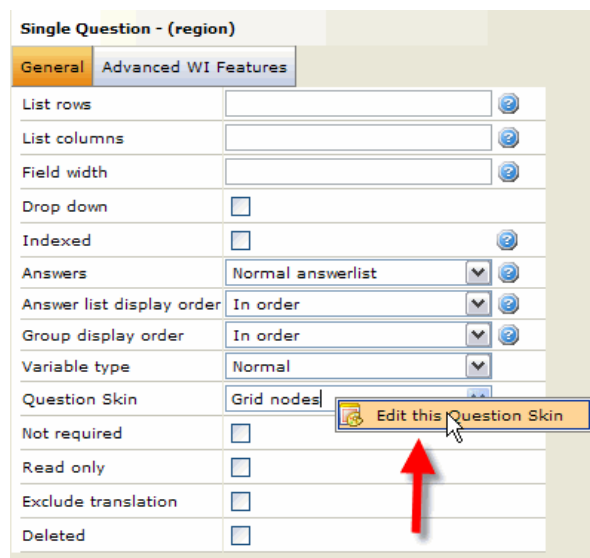


Figure 58: Shortcut to Styles

4.10.3.5 Visual Components for Question Skins

You can use five different question elements inside a Skin as follows:

- **Question Title** – this component works as a place-holder for the question title. Right-click to specify its HTML style.
- **Question Error** – this component works as 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.). Right-click to specify its HTML style.
- **Question Text** – this component works as a place-holder for the question text. Right-click to specify its HTML style.
- **Question Instructions** – this component works as a place-holder for the question instructions. Right-click to specify its HTML style.

- **Question Form Inputs** – this component works as 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 for instance headers. For grid questions, settings also include the look and feel for the scale and the right-side labels (if these are used).

To edit the individual styles (see the following sections for further details), go to the **Layout and Styles toolbox > Html Styles** folder and double-click on the appropriate style name to open the style's Properties pane.

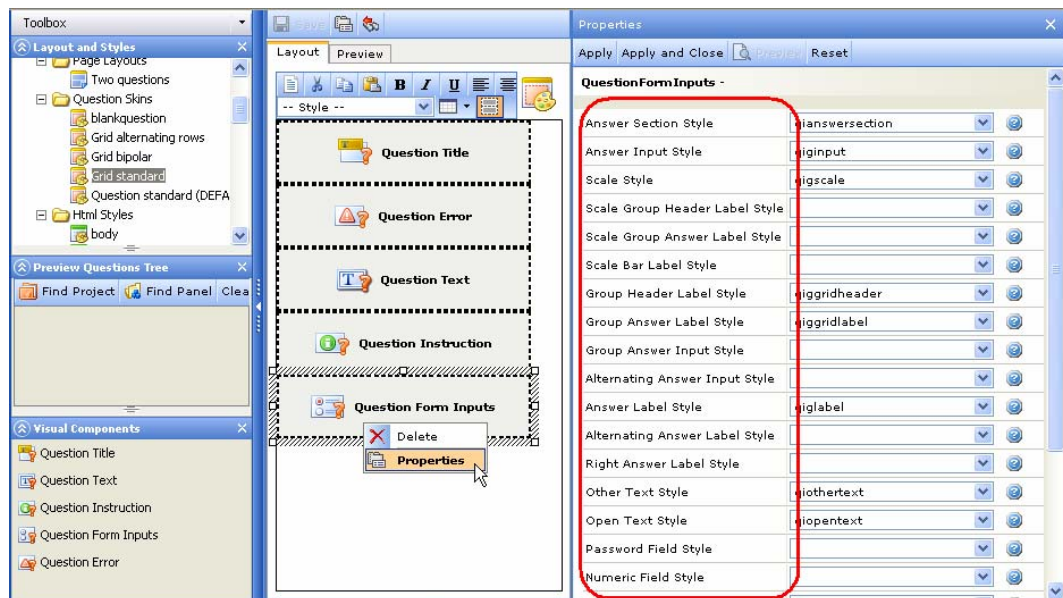


Figure 59: Question Form Inputs

The **Question Form Inputs** is the Question Skin component in which the style settings are most complex. To understand what the styles refer to, some terms must be defined:

- **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). Dropdowns 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 dropdown).

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 will then override (2) above.

Styles at different levels can be applied at the same time. 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 would 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'.

4.10.3.5.1 Answer section Style

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

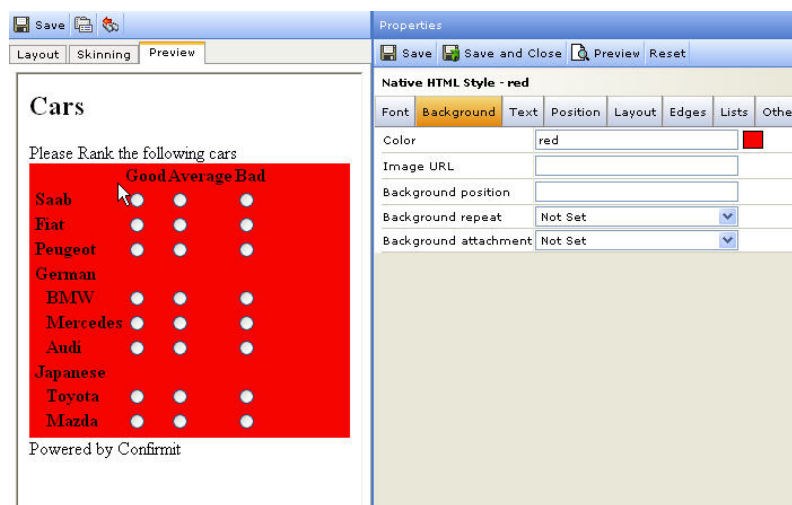


Figure 60: Answer section Style

4.10.3.5.2 Answer Input Style

The 'Answer Input Style' (here with red background) specifies a style for the input cells.

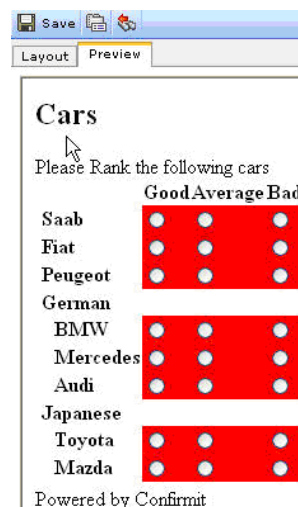
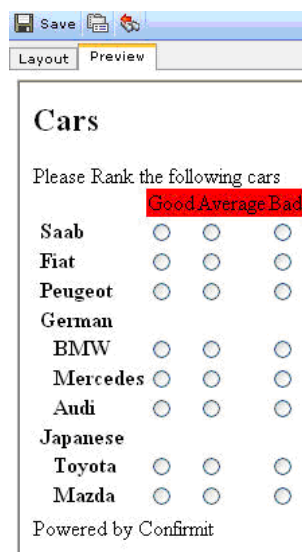


Figure 61: Answer Input Style

4.10.3.5.3 Scale Style

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



The screenshot shows a web application interface for a ranking question. At the top, there is a toolbar with 'Save', 'Print', and 'Help' icons. Below the toolbar are two tabs: 'Layout' and 'Preview'. The 'Preview' tab is active, displaying a form titled 'Cars'. The form contains the text 'Please Rank the following cars' followed by a scale header 'Good Average Bad' which is highlighted with a red background. Below the header, there are three columns of radio buttons for ranking. The cars listed are Saab, Fiat, Peugeot, German, BMW, Mercedes, Audi, Japanese, Toyota, and Mazda. At the bottom, it says 'Powered by Confrontit'.

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

Figure 62: Scale Style

4.10.3.5.4 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.

4.10.3.5.5 Scale Group Answer Label Style

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

4.10.3.5.6 Scale Bar Label Style

This specifies the style of a scale bar. If this is not specified, the general label style will be used. Note that scale bars should have a background color specified to be clearly visible. See also section 7.2.3.4.

4.10.3.5.7 Group Header Label Style

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

Save

Layout Preview

Cars

Please Rank the following cars

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

Powered by Confront

Figure 63: Group Header Label Style

4.10.3.5.8 Group Answer Label Style

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

Save

Layout Preview

Cars

Please Rank the following cars

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

Powered by Confront

Figure 64: Group Answer Labels Style

4.10.3.5.9 Group Answer Input Style

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

Save

Layout Preview

Cars

Please Rank the following cars

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

Powered by Confront

Figure 65: Group Answer Input Style

4.10.3.5.10 Alternating Answer Input Style

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

Save

Layout Preview

Cars

Please Rank the following cars

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

Powered by Confront

Figure 66: Alternating Answer Input Style

4.10.3.5.11 Answer Label Style

In this example, no style has been specified for the group-header and group-answer styles.

Save Layout Preview

Cars

Please Rank the following cars

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

Powered by Confirmit

Figure 67: Answer Label Style

4.10.3.5.12 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. Below we have let the ‘Alternating Answer Label Style’ win and that has affected other aspects of the style than the background-color (alignment and bold/non-bold).

Save Layout Preview

Cars

Please Rank the following cars

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

Powered by Confirmit

Figure 68: Alternating Answer Label Style

4.10.3.5.13 Right Answer Label Style

Use this style to specify the layout for the answer option displayed to the right of the answer grid table.

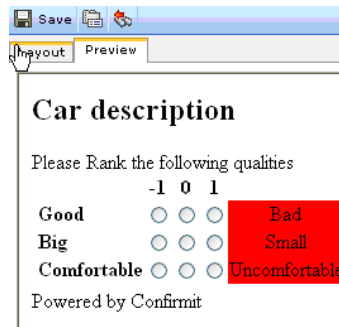


Figure 69: Right Answer Label Style

4.10.3.5.14 Open Text Style

Sets the properties for 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 70: Open Text Style

4.10.3.5.15 Dropdown Style

This style sets the properties for drop-down lists.

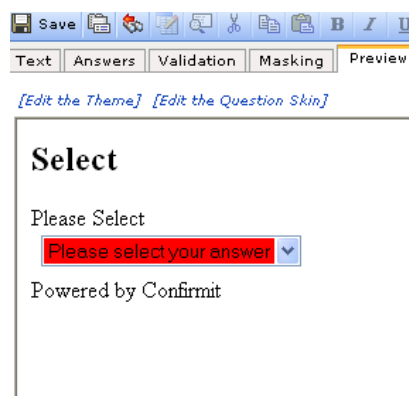


Figure 71: Dropdown Style

4.10.3.5.16 Grid Table Style & Grid Table Cell Style

'Grid Table Style' is set once on the main table rendering a Grid or 3DGrid question (red). 'Grid Table Cell Style' is set on each non-label cell in the grid (yellow). Note that while nothing can prevent 'Grid Table Style' being used (only override), 'Grid Table Cell Style' will be replaced by almost any style set on a label or input.

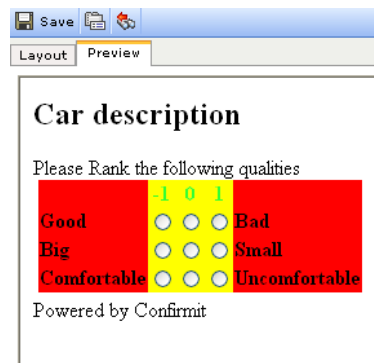


Figure 72: Grid Label Style

4.10.3.5.17 Tag Name

For 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).

4.10.3.5.18 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.

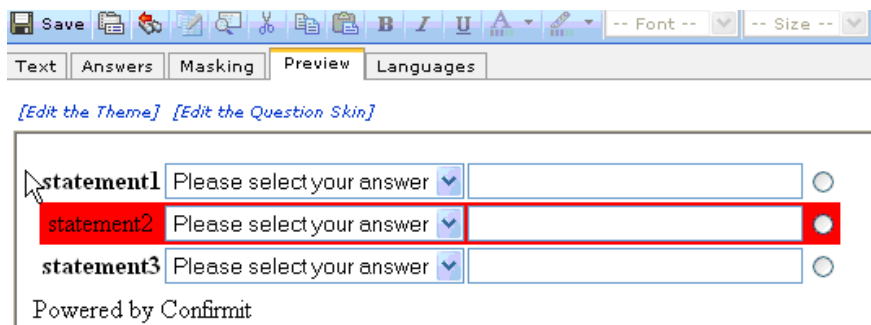


Figure 73: Style on Specific Answer

4.10.3.5.19 Question Error

This component functions as a place-holder for the question error message. Right-click on the component to specify its HTML style

4.10.3.6 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 at any time specify a Survey Layout under **Survey Settings**.

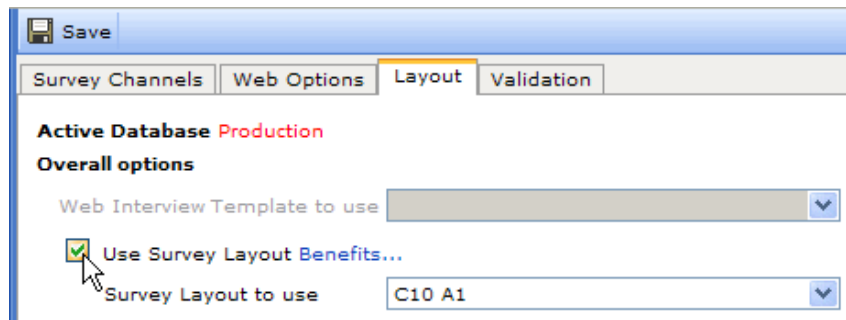


Figure 74: Apply a Survey Layout to a survey

Under the **Layout** tab, select **Use Survey Layout** and choose in the dropdown the Survey Layout you wish to apply to the current survey. Remember that you must relaunch the survey for the interview pages to be updated with the new layout.

4.10.3.7 Dynamic Survey Layout

Instead of specifying a certain Theme or Page Layout for an interview page, you can base the look and feel of that page on the respondent's answer to a previous question or a background question, or any combination of these. As you can use the same technique not only on themes and page layouts, but also on the question skin level and on the style level, this enables Confirmit users to tailor the survey layout to each individual respondent.

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.

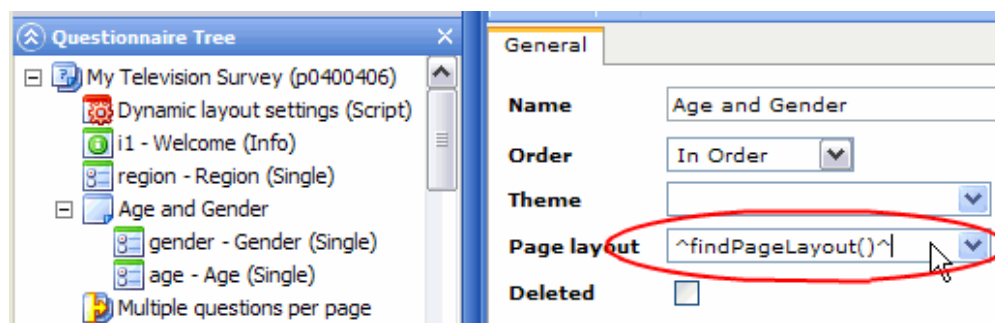


Figure 75: Dynamic Survey Layout

This is done by calling a function from the Page Layout field of the Page object. The carets (hats) tell Confirmit that the text there is not the name of a layout, but instead 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 any checks or controls, and then set (normally hidden) questions based on the result. Or, as here, 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.

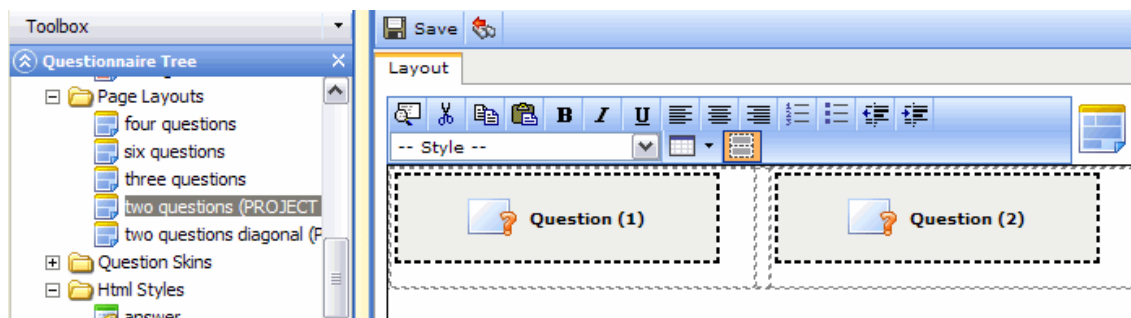


Figure 76: Page Layout "two questions"

The Page Layout called "two questions" displays the two questions next to each other. This will be the result for all respondents with region other than Europe.

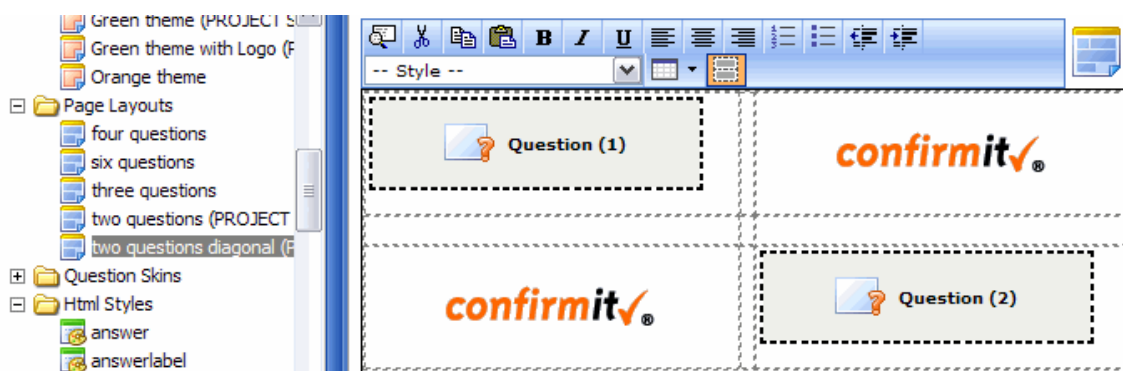


Figure 77: Page Layout "two questions diagonal"

The Page Layout called "two questions diagonal" 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 with region Europe.

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

[Place Your Logo Here]	My Television Survey 0% 25% 50% 75% 100%	
	Gender What is your gender? ☐ Male ☐ Female	Age How old are you? ☐ Under 18 ☐ 18 to 30 ☐ 31 to 50 ☐ 51 to 67 ☐ 68 or more
Powered by Confirmit	« »	

Figure 78: Gender and Age for Non-Europeans

While for respondents who select Europe as their region, the Gender and Age page displays as below:

[Place Your Logo Here]

My Television Survey

0% 25% 50% 75% 100%

Gender

What is your gender?

☐ Male

☐ Female

confirmit®

Age

How old are you?

☐ Under 18

☐ 18 to 30

☐ 31 to 50

☐ 51 to 67

☐ 68 or more

confirmit®

Powered by Confirmit

« »

Figure 79: 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

The *Templates* link leads to three subsections, MS PowerPoint templates, Panel Templates, and Web Interview (WI) templates. 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

The WI Template environment is found as follows:

1. From the General menu, select Templates
2. At Templates, select WI
3. The WI Template environment displays as follows:

☐ Template name Company name

☐ [confirmit default](#) all

☐ [confirmit default \(blue\)](#) all

☒ **Primitives**

SNAME	Survey name
HELP	Help link
NAVCTL	Navigation bar (back/fwd)
NAVBACK	Navigation bar (back)
NAVNEXT	Navigation bar (fwd)
GERROR	Page level error text
PBAR	Progress bar
GERRORBLOCK	HTML-block supporting GERROR-primitive
PBARBLOCK	HTML-block supporting PBAR-primitive
CLINK	Continue link
FTITLE	Form title
FTEXT	Form text
FCOMMENT	Form instruction
INPUTS	Form inputs
QNUM	Question number
QID	Question ID
RNAME	Report name
RGEN	Report generation time
RPER	Report data period

Figure 80: WI Template Editor

This primary screen includes the following features and functionality:

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.

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 a link to the webpage.
^NAVCTL^	Navigation bar (back/fwd). Both navigation buttons will be displayed.
^NAVBK^	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

Table 4: Primitives

You will also be able 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.

A couple of 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. From the primary WI Template screen, click NEW.
2. A new unnamed template file displays in the Template Name column; the editing window displays in the pane to the right.

Choose WI template to edit or copy an existing template p0005730 - 85system

☐ Template name

☐ (New template)

☐ confirmit default

☐ confirmit default (blue)

☒ Primitives

SNAME	Survey name
HELP	Help link
NAVCTL	Navigation
NAVBACK	Navigation
NAVNEXT	Navigation
GERROR	Page level
PBAR	Progress bar
GERRORBLOCK	HTML-block
PBARBLOCK	HTML-block
CLINK	Continue link
FTITLE	Form title
FTEXT	Form text
FCOMMENT	Form instruction
INPUTS	Form input
QNUM	Question number
QID	Question ID
RNAME	Report name
RGEN	Report generation
RPER	Report data

(New template)

☒ Attributes

Template company	user manual	Progress bar image	Blue
Name	(New template)	Description	(New template)
Left column width (if percentage: use %)		Progress bar background colour	
Report light color		Report dark color	
Grid color		Pivot View menu background color	
Pivot View menu light color		Pivot View menu dark color	
HTML attributes			
Body attributes			
Error font attributes			
Horizontal label font attributes			
Vertical label font attributes			
Progress bar font attributes			

☒ HTML

Pre HTML-tag	
HEAD-tag content	
Page header1	

Figure 81: Creating new template

4.11.1.2.1 Saving and Previewing Template Edits

Edits to a template are saved by clicking the 'Save' tab or by switching between any of the other tabs.

Edits to a template are previewed by clicking the 'Preview' tab. You can also click a button to get the preview of the WI template in a pop-up window. This will enable you to get preview of the full HTML code when using stylesheets or content in Pre HTML/Head HTML tags.

4.11.1.2.2 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.

These sections may be collapsed and expanded by clicking on the collapse/expand button to the left of each section heading.

4.11.1.2.3 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 vary from page to page.

Grid Color

The color of the gridlines 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:

```

```

Note: When you are running surveys from a secure site using SSL and 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 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

4.11.1.2.4 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:

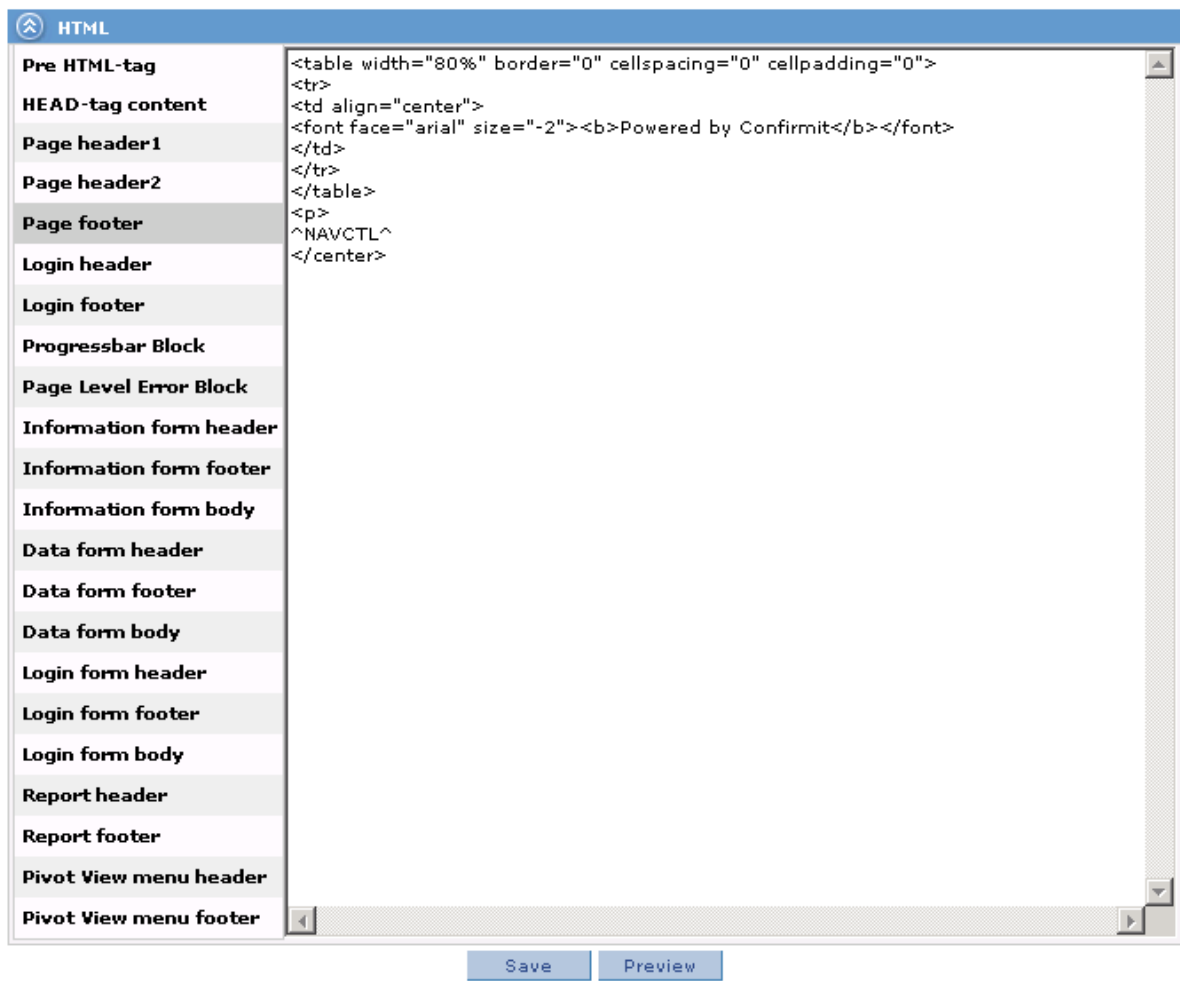


Figure 82: Editing HTML fields

To display an HTML editing field:

1. Click the HTML hyperlink field, for example Page Header; the editing window for the field displays.
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 is 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.

4.11.1.3 Published Report Templates

The following four fields control the layout of Published Reports (See section 20.14 Report Publisher for Users Who do not Have Access to Advanced Reporting). No preview of these templates is available at the moment. In order to see the edited template, you will have to 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 name

RGEN Report generation time

RPER Report data period

For more information visit http://extranet.confirmat.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 have to 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 Confirmat. All templates uploaded are visible to Confirmat users within the same organization. A user may select from these templates when ordering MS PowerPoint presentations. Extension: .pot.

4.11.3 Panel Templates

For a detailed description see section 16.8 Panelist Web Page Templates.

4.12 Community Portals

4.12.1 Introduction

In Confirmat 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. For more information about Panels see chapter 16 Basic Panels.

4.12.1.1 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 83: A Community Portal

Community Portals can only be used together with Confirmit Panels. For more details on Panels, see Confirmit Authoring Manual for more information.

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 adding an existing Community Portal template to your panel (this is the most common approach) or creating a Community Portal from scratch.

To add a Community Portal to a Confirmit Panel, simply enter your Panel project inside Confirmit. From the dropdown menu "Panel Management" you choose "Community Portals".

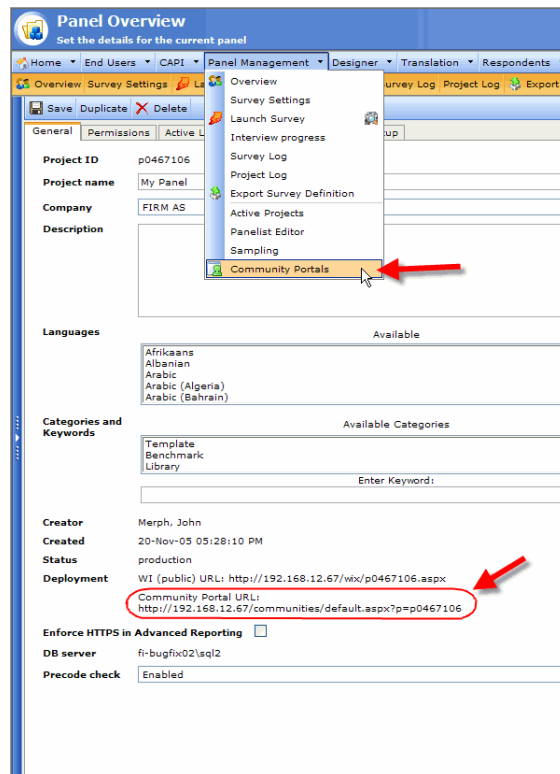


Figure 84: Activting a Community Portal

Note that 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 entering Community Portals for a Panel, Confirmit lists all the portals that you have access to. The current portal (if any) is shown in bold. You can choose to create a new portal by clicking the button “New Community Portal” in the upper right hand corner. You can also import Community Portals created on other Confirmit installations by clicking “Import Community Portals”.

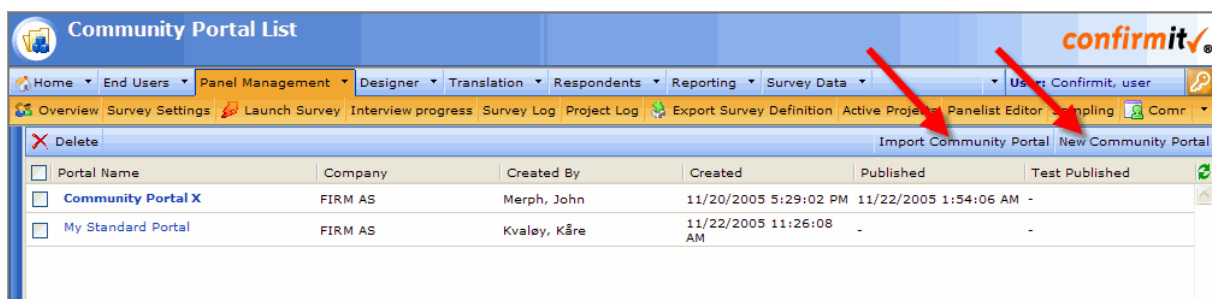


Figure 85: List of available Community Portals

To create a new Community Portal from scratch, you choose “New Community Portal”. Confirmit then takes you through a two-step wizard. In step one you give your new portal a name. If you then choose “Finish”, you will be taken into an empty Portal Designer. If you choose “Next”, Confirmit lets you choose a template on which to base your new Community Portal. When clicking “Finish” on step 2, the Portal Designer will appear, holding a copy of the template you chose in step 2. In the Portal Designer you build the different portal pages. For more information on how to work inside the Portal Designer, see section 4.12.3 Working with your Community Portal.

4.12.2.2 Adding an Existing Community Portal Template to a Panel

From the list of available portals (see Figure 85 above) you have direct access to the Community Portals. You click on the name of a portal to go to the Portal Designer for that portal. If you click the little arrow symbol to the right of the portal names, a dropdown menu appears. Via the dropdown menu you can 1) access the Portal Designer for the portal specified 2) view the published version of that Portal as a panelist (View) 3) make a duplicate of the portal (Duplicate), and 4) export the Community Portal to transfer it across to other Confirmit Installations or for offline storage (Export).

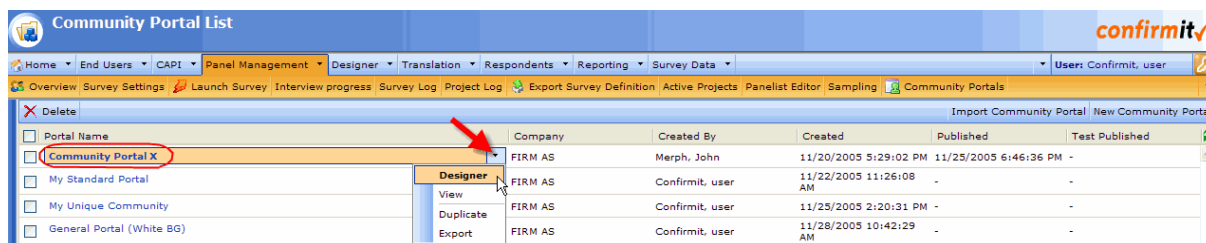


Figure 86: Accessing a Community Portal

Choosing “Designer”, Confirmit takes you into the Portal Designer where you can change the portal, optimizing it for the current Panel. For information on how to work inside the Portal Designer, see section 4.12.3 Working with your Community Portal.

4.12.3 Working with your Community Portal

Let us have a look at the Portal Designer. This is where you create and make changes your portal pages. To help us we will use an example portal called “Community Portal X”. As shown in the figure below, we have already added a Page Master, three Themes, and five Pages. In addition, there are six pages inside the folder “Members” (for more on Folders see section 4.12.3.3.3 Folders).

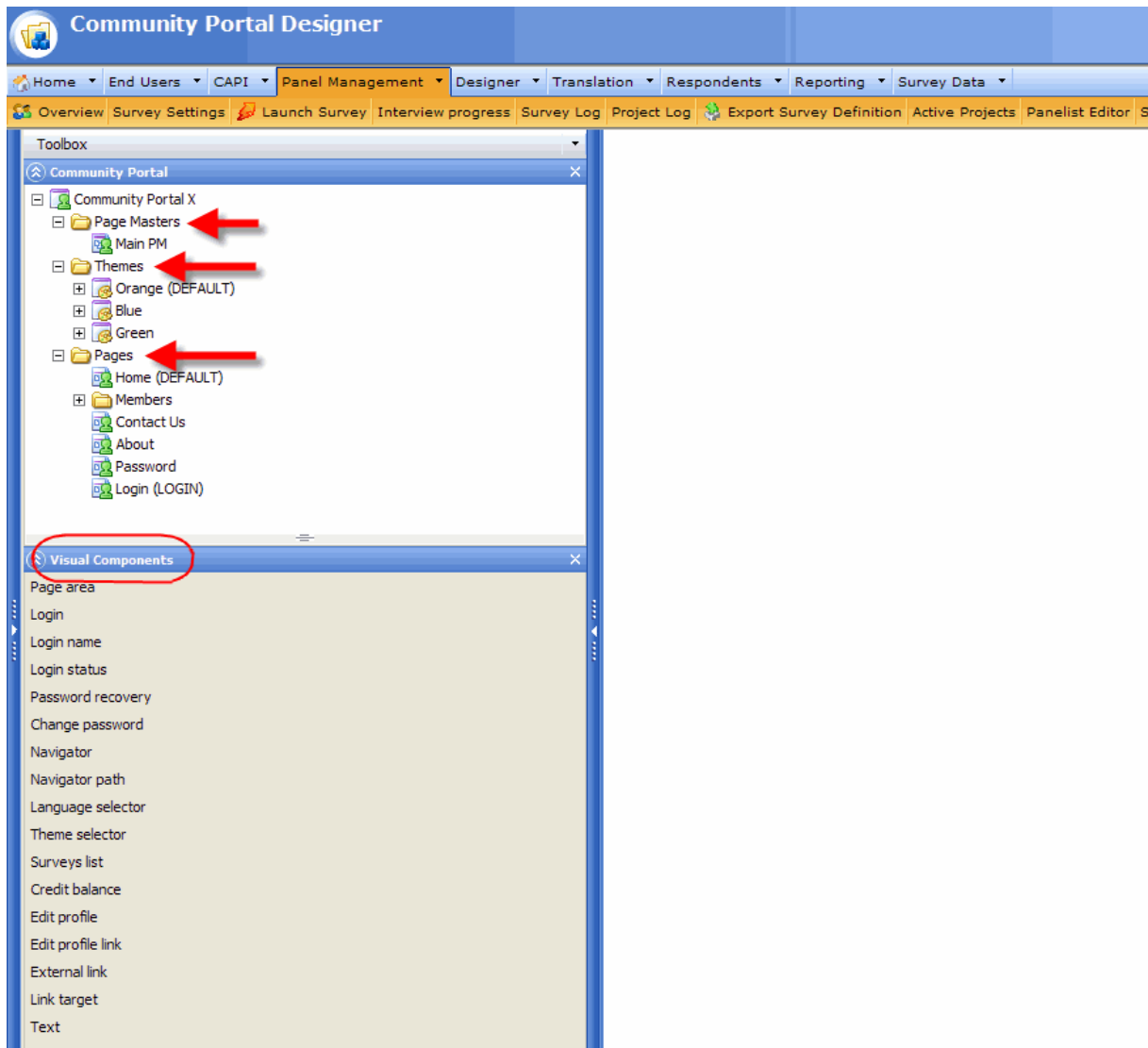


Figure 87: Toolboxes inside Portal Designer

Inside the Portal Designer you will see two toolboxes. One is called “Community Portal” holding all your Page Masters (see section 4.12.3.1 Page Masters), Themes (see section 4.12.3.2 Themes), and Pages (see section 4.12.3.3 Pages). The other toolbox is called “Visual Components” which are the elements that you can use on a page. Visual Components are explained in section 4.12.3.4 Visual Components.

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 like. For each portal page you can apply a page master. If you do, that portal page will then have the look-and-feel of the Page Master specified. Let us have a look at the page master in our “Community X” portal.

4.12.3.1.1 Editing a Page Master

To create a new Page Master simply right-click on the term “Page Masters” (next to the yellow folder), and choose “Insert new Page Master”. A blank Page Master will then be added to your portal. If you want to base a new Page Master on an existing one, then right-click on the wanted Page Master, and choose “Duplicate”.

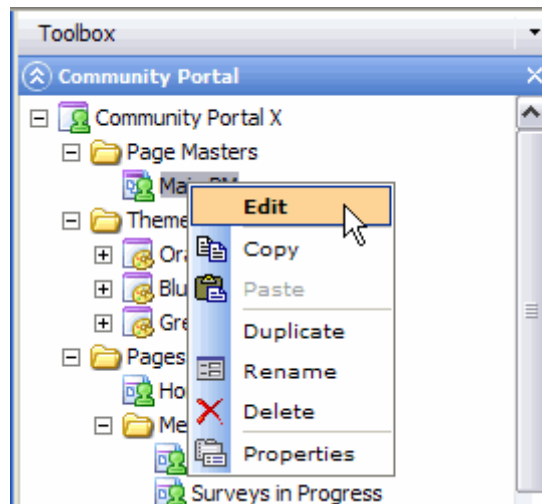


Figure 88: Edit Page Master

In our example portal, there is a Page Master called “Main PM”. To edit a Page Master, simply double-click the name of the Page Master, or right-click and choose “Edit”.

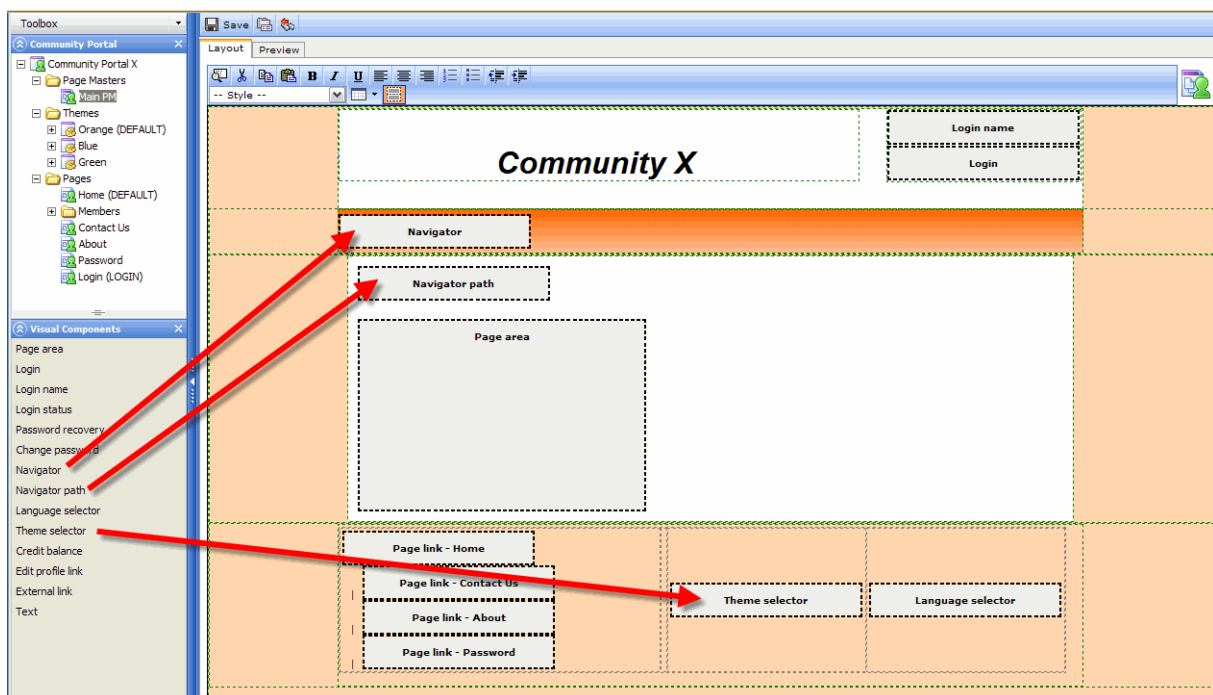


Figure 89: Editing a Page Master

When editing a Page Master (as with a portal page), there are two tabs in the upper left hand 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, simply double-click the element or right-click on the element and choose Edit. For more information on the Visual Components, see section 4.12.3.4 Visual Components.

To learn how to use HTML tables, free-from text, and images on your portal pages, see section 4.12.5 Editing your Page Masters and Portal Pages.

The tab called “Preview” is used to preview the current version of the Page Master. Remember to “Save” (button right above “Layout” tab) 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 (see section 4.12.3.4 Visual Components).

4.12.3.2.1 Styles

Click the plus sign in front of each 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 (as well as free-form text) can be assign any of these look-and-feel definitions. To set a Style for a Visual Component, simply double-click the component (or right-click and choose Properties) as shown in figure below.

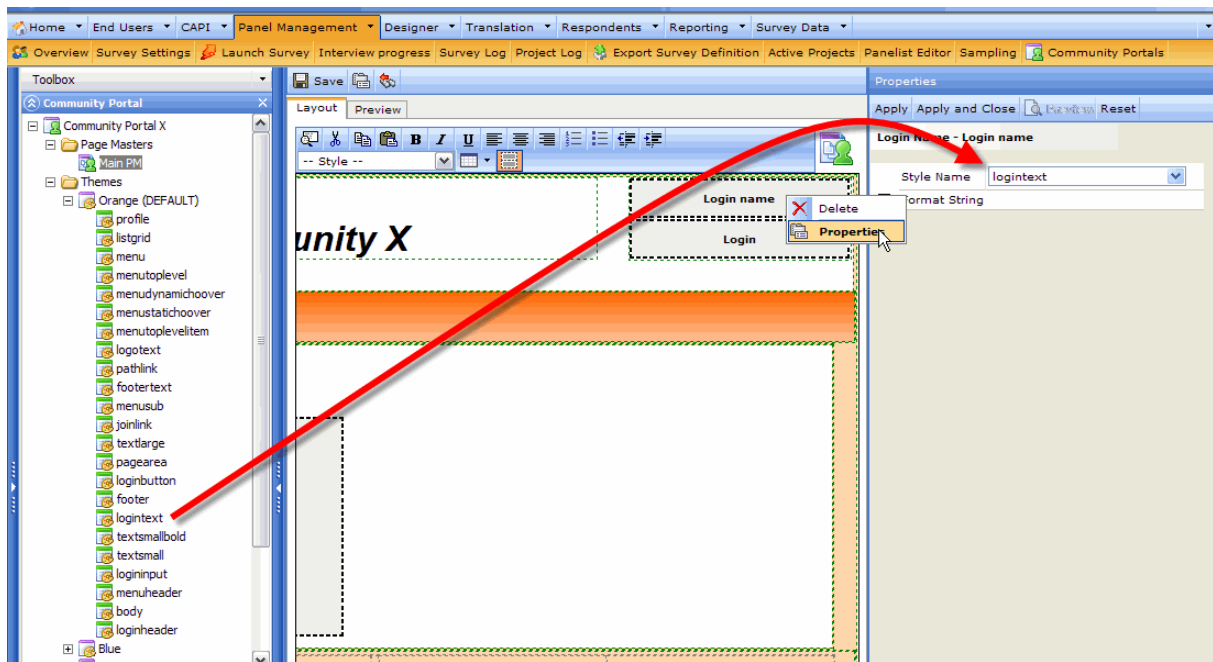


Figure 90: Applying a style for a Visual Component

Here I right-click on the component “Login name”, and specify “logintext” as its style. Now lets double-click the style to see how a style is set up (or right-click the style and choose “Properties”). When you do, the style designer opens up in the right hand frame.

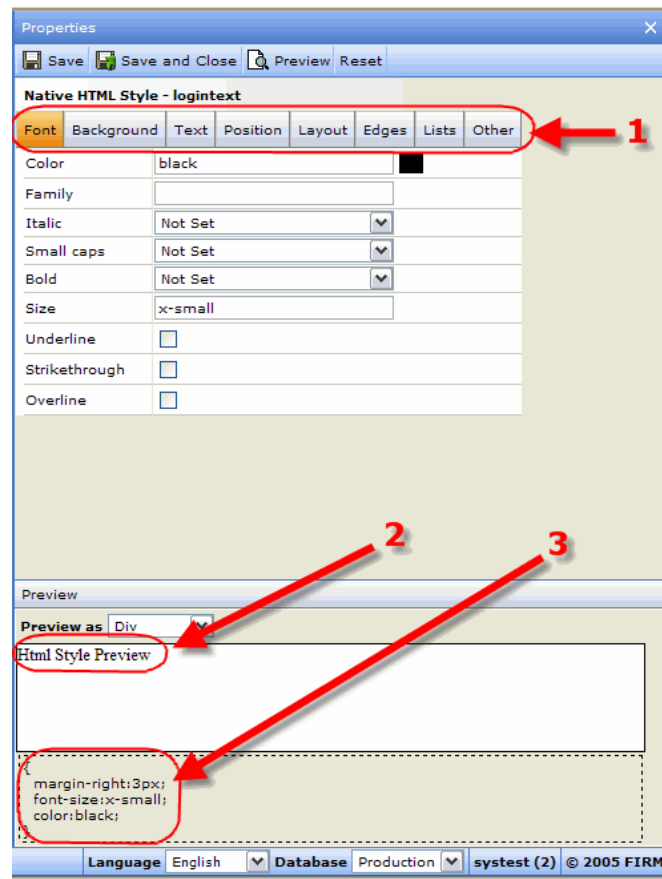


Figure 91: Working with Styles

The figure above shows properties for our style “logintext”. Across the top (marker 1 in figure above) you can edit a wide number of settings for each style. There are settings for font, background, text, position, layout, edges, and lists. There is also a category called “Other”. Whenever you change a setting, Confirmit gives you an instant preview (see marker 2 in figure above) of the style do that you quickly can see how each setting affects the style. Also, when making changes to a style, each alteration (setting) is listed right underneath the preview so that you at all times know which settings have been set for that style (see marker 3 in figure above). See also section about Theme Selector in section 4.12.3.4 Visual Components.

4.12.3.2.2 Set as Default

You can set a Theme to be the default one. The default Theme will always be used unless otherwise chosen by panelists. To set a Theme as Default, simply right-click the preferred Theme, and choose “Set as Default”. Confirmit will display the text “DEFAULT” next to the default theme inside the Community Portal toolbox.

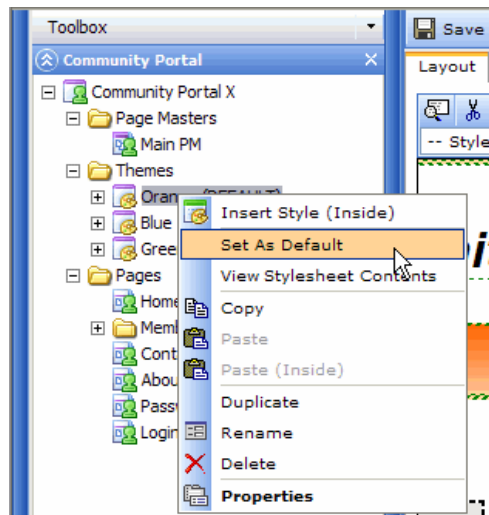


Figure 92: Set as Default

4.12.3.2.3 View Stylesheet Contents

You can right-click a Theme at any time and choose "View Stylesheet Contents". Conifit will then show all the styles for that Theme. This is very helpful if you want to quickly find the definition of all styles, typically for use outside this theme.

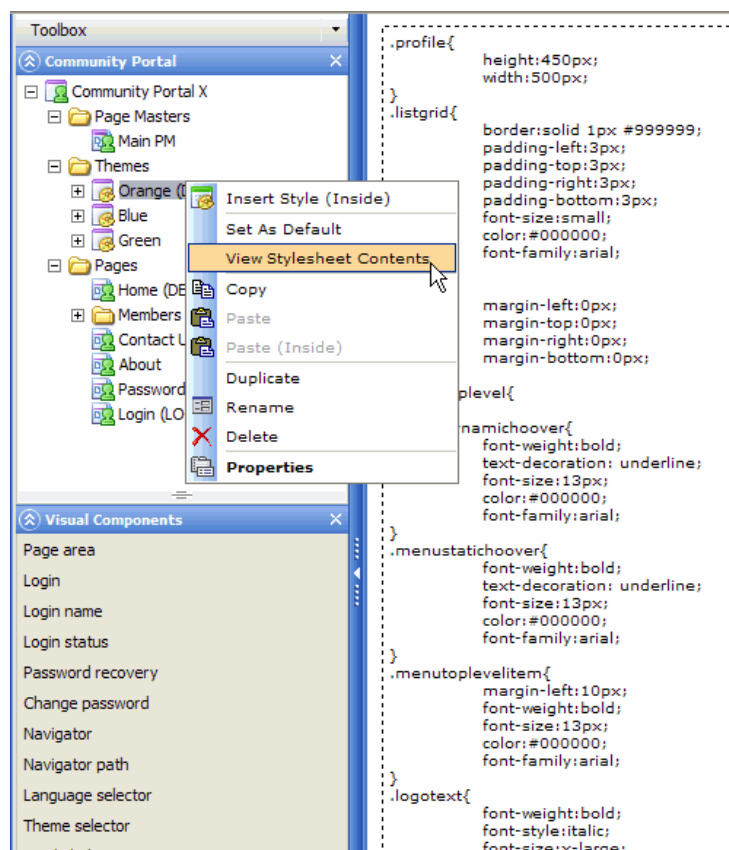


Figure 93: View Stylesheet Contents

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, simply right-click on the word “Pages” and choose “Insert”, or right-click an existing page and choose “Duplicate”. Let us have a look at an example. The figure below is a preview of the page “Home”.

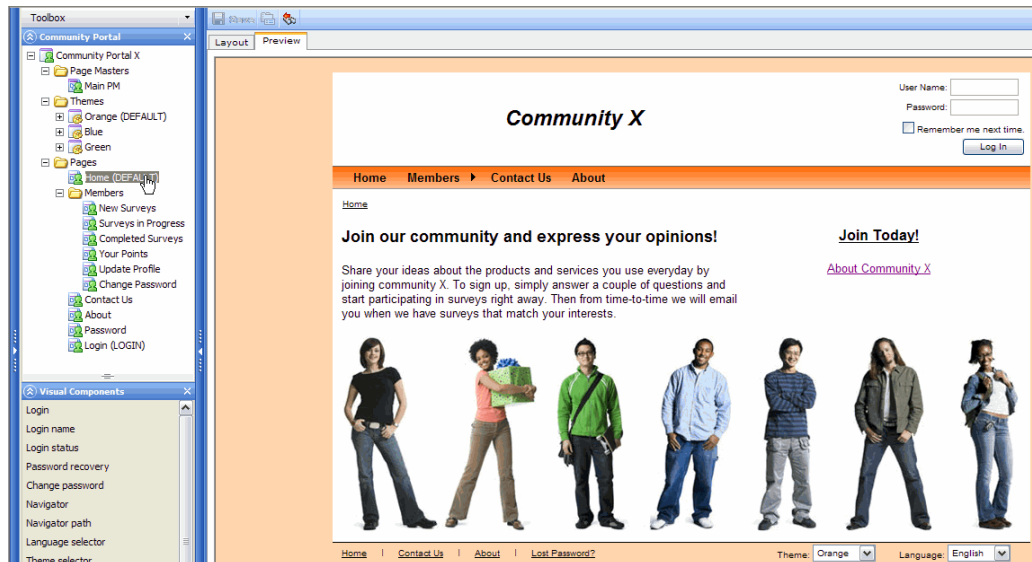


Figure 94: Previewing a portal page

Now, let us find out why the “Home” page looks like this. To see the set-up of the page, we must look at 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 to use, as well as their positioning.

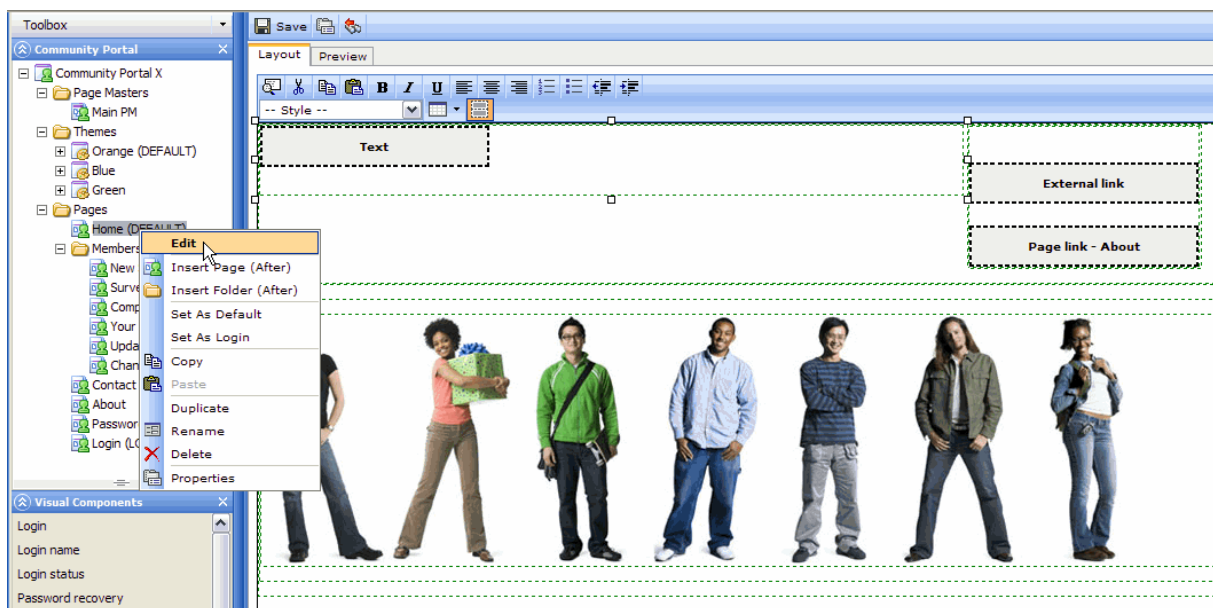


Figure 95: Editing a Page

On this page we want to show some text (the text element), an external link, as well as a link to the page called "About". We have also inserted an image across the bottom of the page. We have also right-clicked the page, and under page properties, set Page Master for this page to be "Main PM" (see section 4.12.3.1 Page Masters). As is shown in section 4.12.3.4 Visual Components, the element called "Page Area" determines where the page (portal page) goes 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 not, the default PM will be used). The portal pages will always appear on the screen where the Visual Component "Page Area" is placed. Compare figures Figure 94, Figure 95, and Figure 96. Figure 96 holds the overall look-and-feel, the portal page "Home" (built in Figure 95) is placed where the Page Area element is. Figure 94 shows how the page is displayed on screen to the panelist.

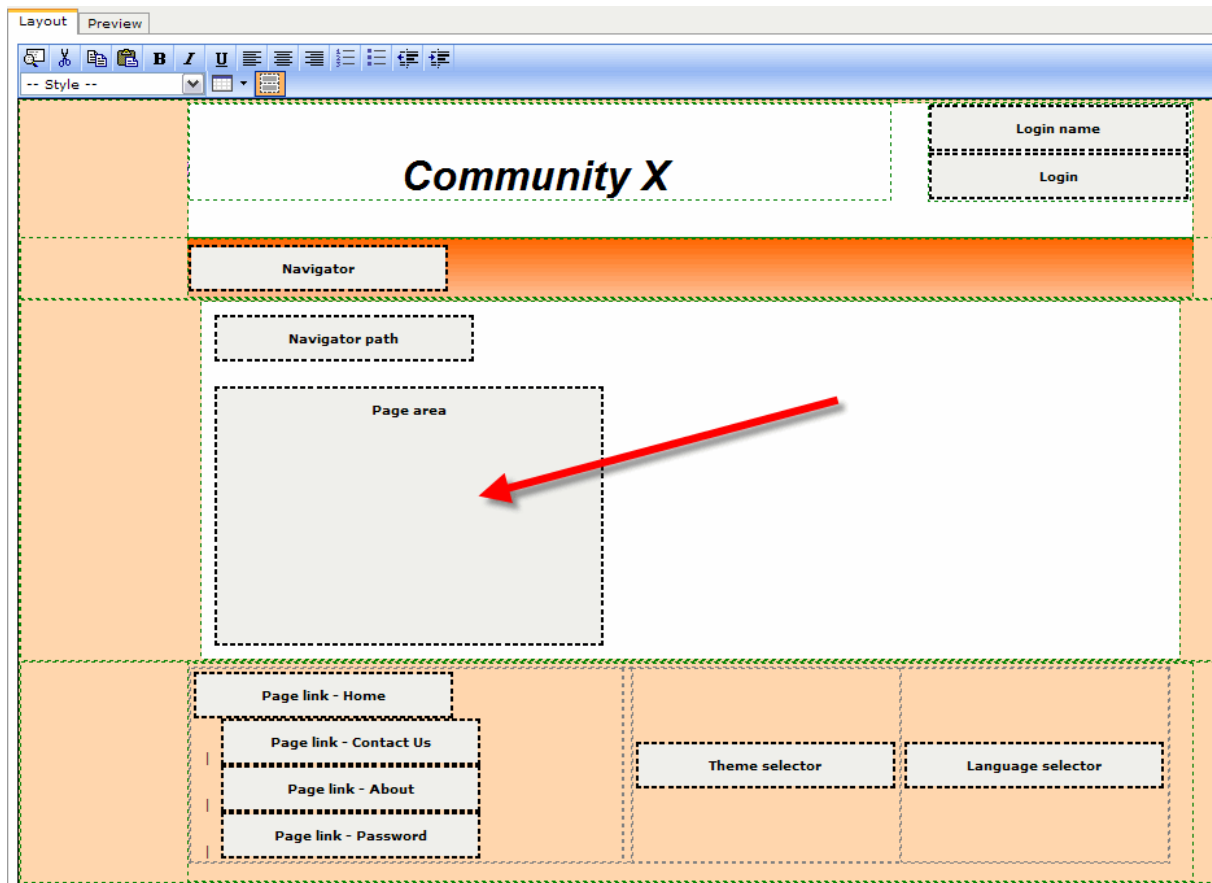


Figure 96: Page Area

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 by right-clicking the page and choosing "Set as Default". Confirmit will show the default page each time a new visitor enters the portals. Normally, the wanted starting page (home page) is set as the default one.

The page you want to use as the login page must also be specified. You do this by simply right-clicking the page, and selecting "Set as Login". Confirmit will display the text "LOGIN" next to the login page inside the Community Portal toolbox.

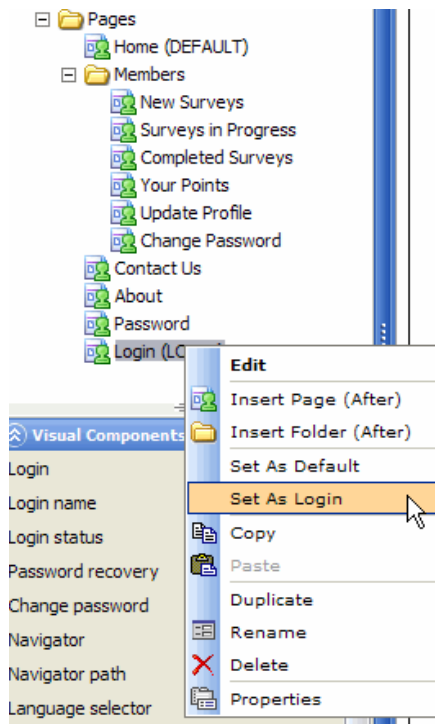


Figure 97: Set as Login

4.12.3.3.3 Folders

Folders are used inside the “Pages” section to create a menu system for all the portal pages. Each folder will create a clickable submenu for the panelists. You can right-click to insert new folders, and then place pages inside the folders. You can also have folders within folders. In the figure below, observe how the pages “Home”, “Contact Us”, and “About” come up as separate pages on the menu bar. The folder “Members” creates a dropdown menu which again leads to all the pages inside the folder. The page “Password” has been set to “invisible” under page properties, thus not showing in the preview here. The login page is treated differently, showing up only when people try to enter restricted pages.



Figure 98: Folders

4.12.3.3.4 Page Properties

To alter properties for a portal page, simply right-click the page and choose “Properties”.

The screenshot shows a 'Properties' dialog box with a blue header. Below the header, the title 'Page - About' is displayed. The dialog is organized into several sections, each with a collapse/expand icon (a square with a minus/plus sign) on the left. The 'Page Master' section has a dropdown menu set to 'Main PM'. The 'Name' section has a text box containing 'About'. The 'Protected' section has an unchecked checkbox. The 'Navigator Item' section is expanded, showing 'Visible' and 'Visible When Not Logged In', both with checked checkboxes. The 'Title' section is collapsed. The 'Description' section is expanded, showing three text boxes for 'English', 'Japanese', and 'Norwegian', all of which are currently empty.

Properties	
Page - About	
Page Master	Main PM
Name	About
Protected	☐
☐ Navigator Item	
Visible	☒
Visible When Not Logged In	☒
☐ Title	
English	
Japanese	
Norwegian	
☐ Description	
English	
Japanese	
Norwegian	

Figure 99: Page Properties

Inside page properties you can decide **Page Master** for that page (for more on Page Masters see section 4.12.3.1 Page Masters). The property **Protected** is checked if you want this page to be accessible for people who are logged in only. If a page is not protected all visitors can see the page. Under **Navigator Item** you decide if you want the page to be visible on the menu bar. If you select “Visible”, the page is visible all the time. For pages you want to hide to all people not logged in, you unselect “Visible when not logged in”. The page is then available only for people logged in.

Under **Title** you can specify what you want the page to be called per portal language, and under **Description** you specify (per language) what text you want 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. Simply drag-and-drop the components onto the page(s) 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 determine layout and functionality for the element.

4.12.3.4.1 Page Area

The component called “Page Area” determines where the page (portal page) goes 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 not, the default PM will be used). The portal pages will always appear on the screen where the Visual Component “Page Area” is placed in the Page Master. Compare figures Figure 100, Figure 101, Figure 102. Figure 100 holds the overall look-and-feel, the portal page “Home” (built in Figure 101) is placed where the Page Area element is. Figure 102 shows how the page is displayed on screen to the panelist,

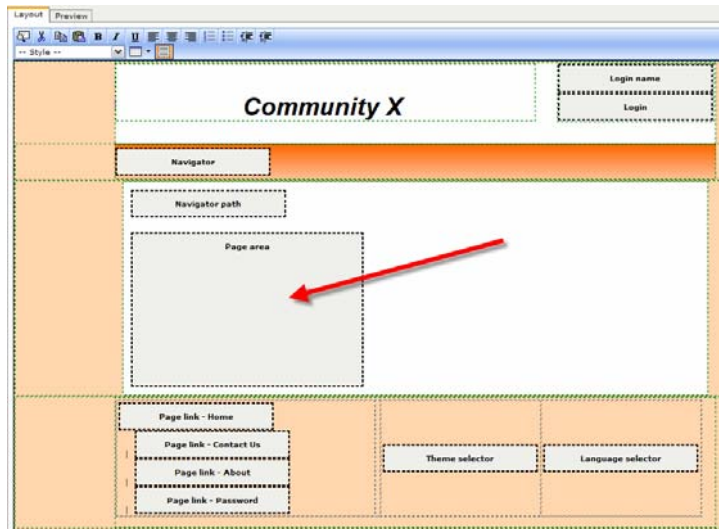


Figure 100: The Page Master with the Page Area element

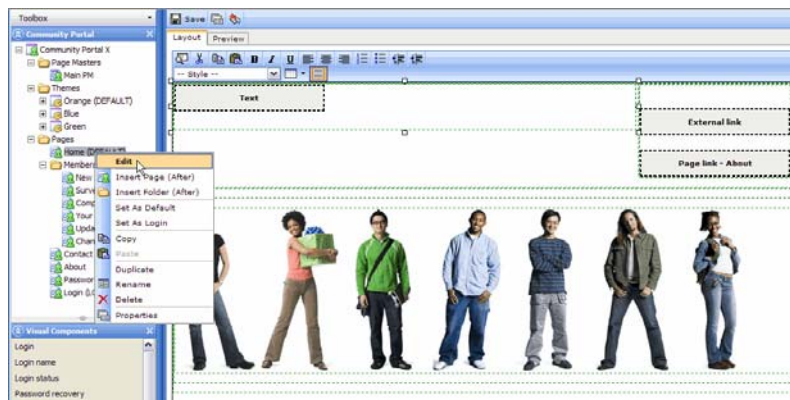


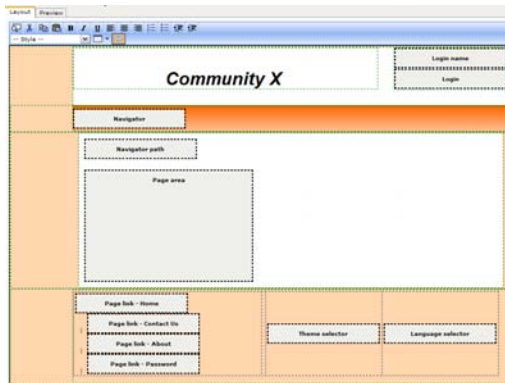
Figure 101: The page called "Home"



Figure 102: The "Home" page of the portal

Note observe how the page is place where the Page Area is positioned.

4.12.3.4.2 Login



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

4.12.3.4.3 Login name

The “Login name” element shows the username of the panelists after he or she logs in. In the figure below, we are setting properties of the “Login name” element. In the example below we specify a custom text (Format String) so when for instance Peter Jones logs in with his username “peterj”, the text becomes “Welcome peterj!”

Currently, the “username” is the only element that can be piped into the Login name component.

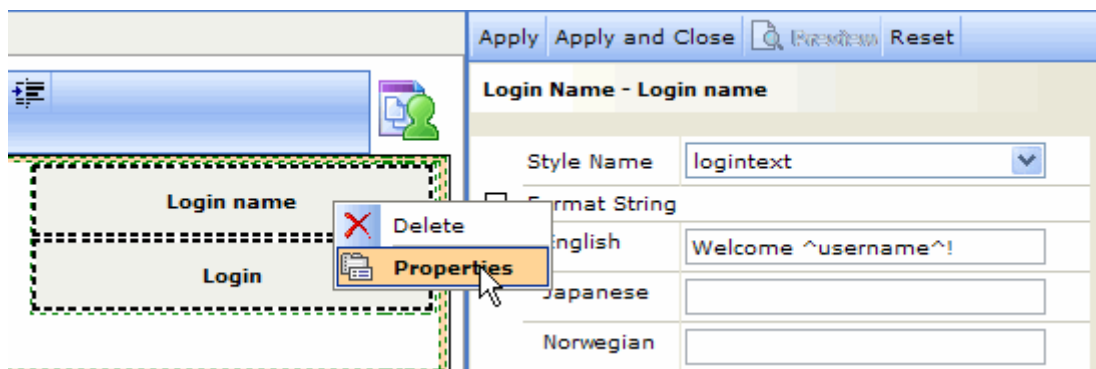


Figure 103: Login name

4.12.3.4.4 Login Status

The Visual Component “Login Status” lets you place a hyperlink to a login page anywhere in your portal. This element is often used in combination with the property “Show Login Status When Logged In” 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 element “Login status” may not be used.

4.12.3.4.5 Password Recovery

This element lets the panelist ask for his or her password to be sent to his or her email address. This requires that he or she has registered as a panelist before.

4.12.3.4.6 Change Password

This element is used to let the panelist at any time change his or her password.

4.12.3.4.7 Navigator and Navigator Path

The Navigator element determines where on the page the menu is displayed. The Navigator path shows the panelists his or her history of pages visited.

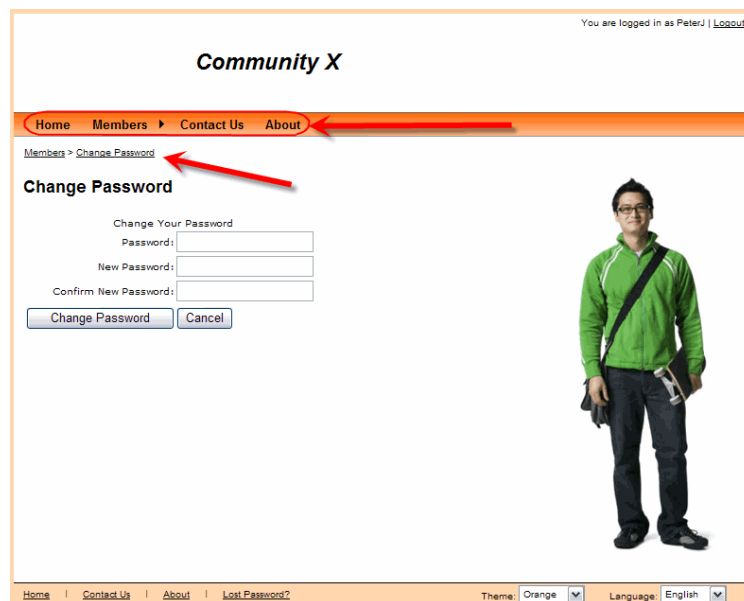


Figure 104: Navigator and Navigator path

4.12.3.4.8 Language selector

The panelists and other visitors to your portal can easily choose their portal language.



Figure 105: Language Selector

4.12.3.4.9 Theme selector

The panelists and other visitors to your portal can easily choose among the themes set up in the portal. For more details on Themes, see section 4.12.3.2 Themes.

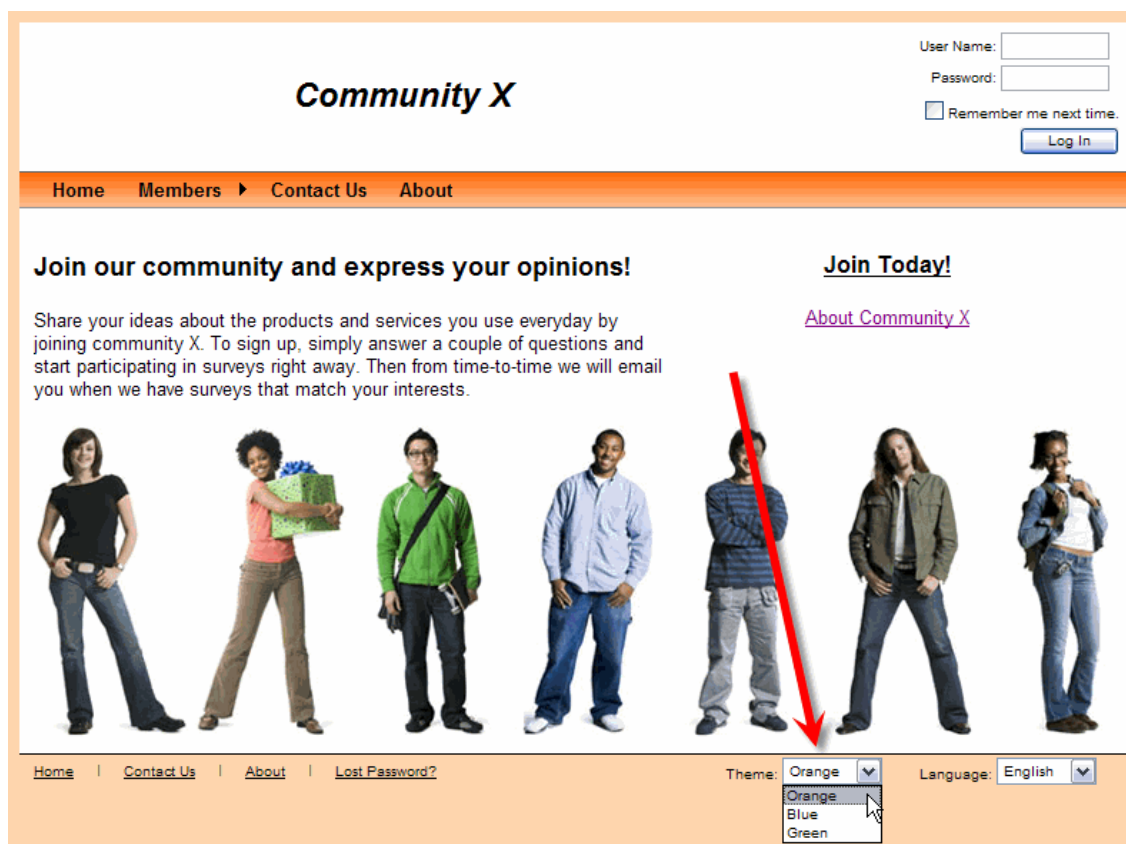


Figure 106: Theme selector

4.12.3.4.10 Credit balance

Conformit keeps track of points earned for panelist participation. The Visual Component call "Credit balance" is used to display the current amount of earned points. In the example below we have dragged the element onto our "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.

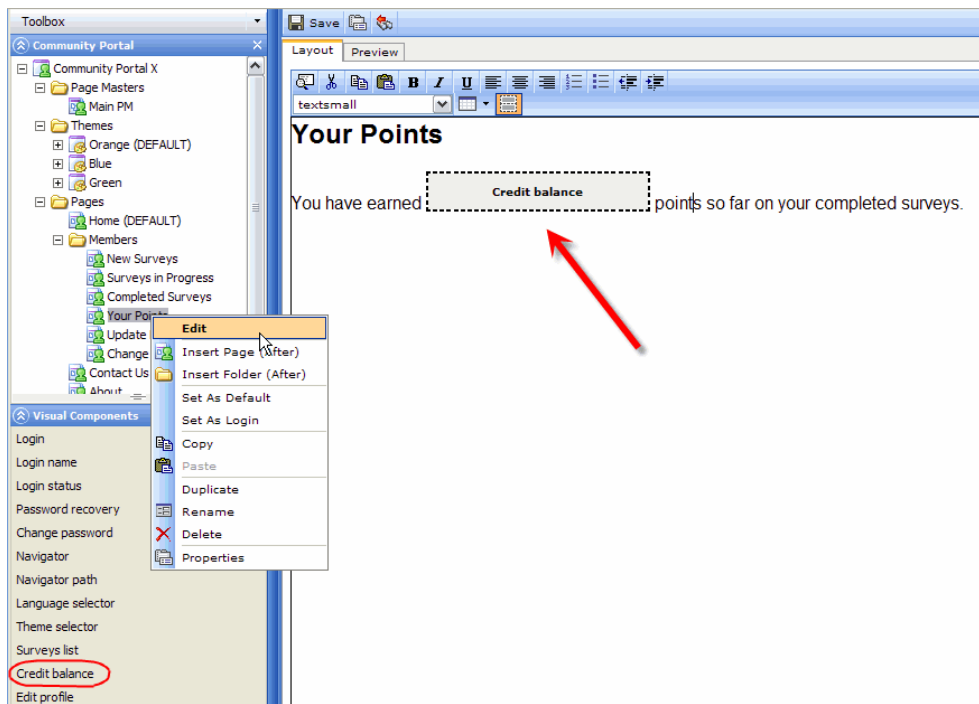


Figure 107: Credit balance

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 a panelist turns 30. He or she must have a chance to update the age question in their profile.

Where the element “Edit profile” is placed, that is where the registration survey will appear for the panelists.

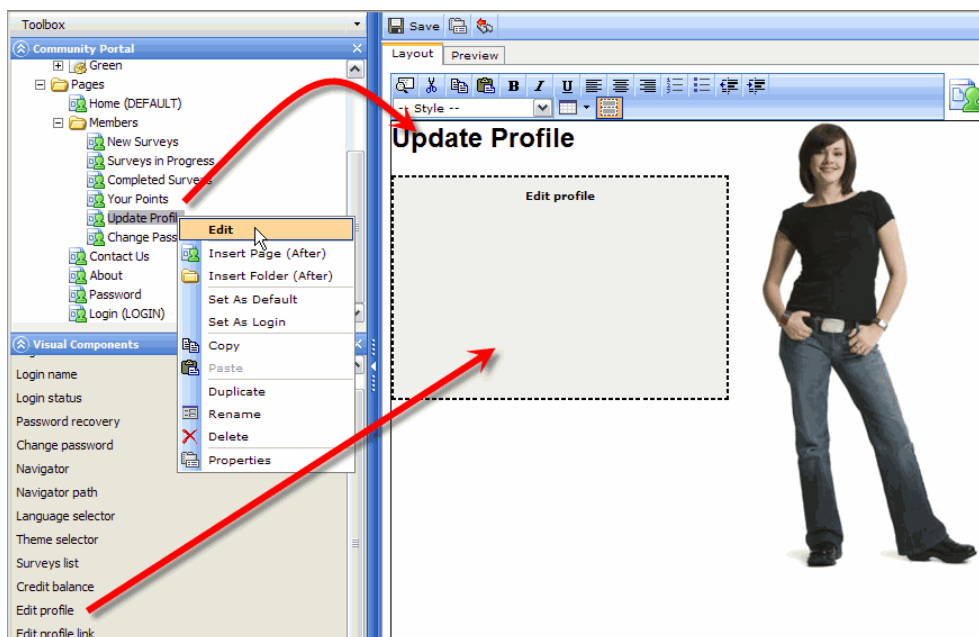


Figure 108: Edit profile

Let us have a look how this works from the respondent's end. In the figure below, Peter Jones (here with username: PeterJ) is logged in. He selects "Update Profile" from the dropdown menu.



Figure 109: A respondent updates his profile

When he selects "Update Profile" he is taken to the portal page seen in figure below. The Page Master for this page is "Main PM" (see section 4.12.3.1 Page Masters) so the portal page opens neatly inside the Community Portal look-and-feel.

You are logged in as PeterJ | [Logout](#)

Community X

Home Members ▶ Contact Us About

[Members](#) > [Update Profile](#)

Update Profile

Please enter your name

Please enter your email address

Your gender

☒ male
☐ female

Your age

☐ Below 20
☐ 20 - 29
☒ 30 - 39
☐ 40 - 49
☐ 50 or above

[Powered by Confirmit](#)



Home | [Contact Us](#) | [About](#) | [Lost Password?](#) Theme: Orange Language: English

Figure 110: A respondent updates the panel survey (his profile)

4.12.3.4.12 External link

You can insert hyperlinks on your portal pages. Simply drag the Visual Component “External link” onto a page. Then double-click the element (or right-click and choose “Properties”) to set properties for the element. Inside properties you specify what URL you want this link to have.

4.12.3.4.13 Text

The Visual Element “Text” is used to display text on a portal page. As explained in section 4.12.5.7 Free-form Text you can enter text directly onto a page. If you do, such text will be the same for all panelists, regardless of language. If you use the Text element, you are allowed to specify text per language, and Confirmit will display the text in the language chosen by the panelist via Language Selector (see section 4.12.3.4.8 Language selector).

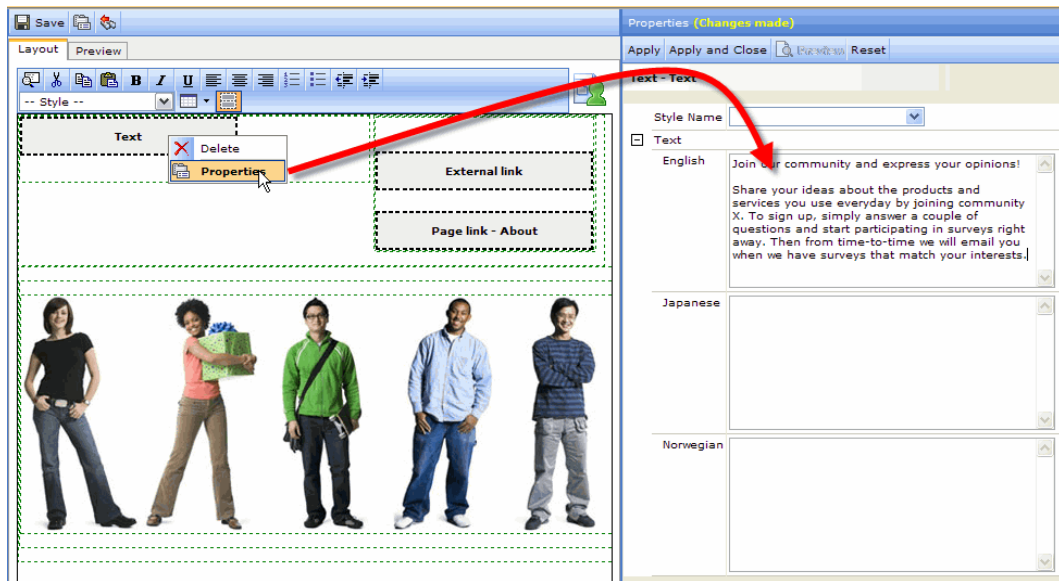


Figure 111: Language transparent text element

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 right 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).

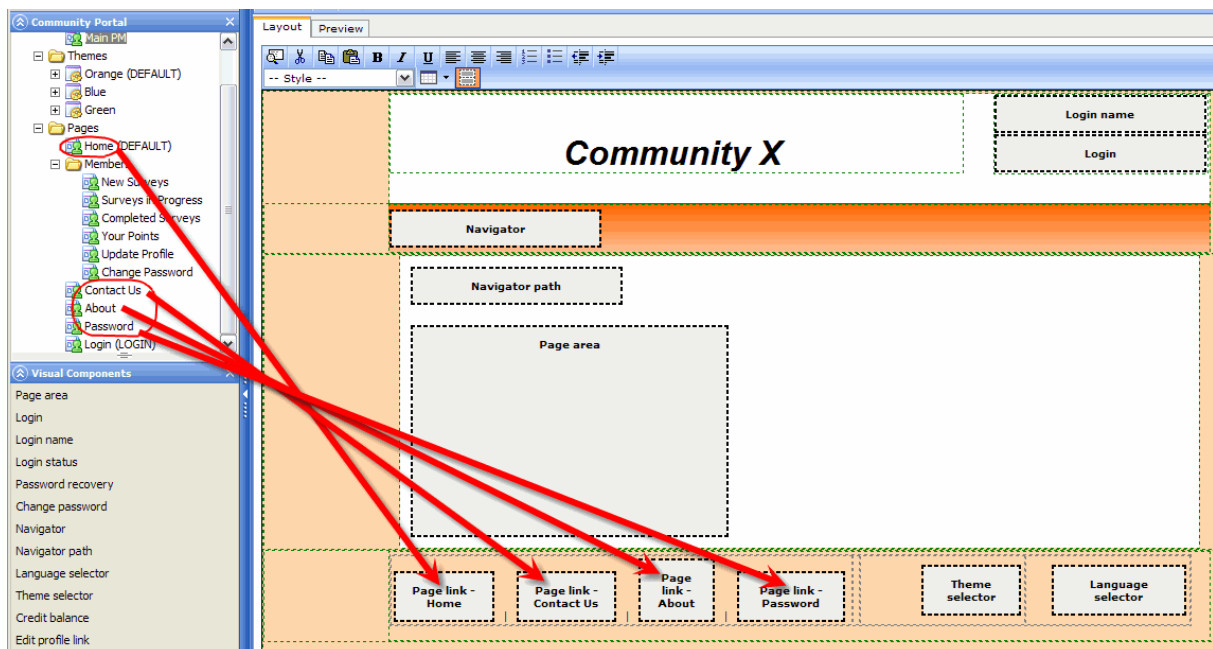


Figure 112: Direct page linking

4.12.3.5 Properties on a Community Portal

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

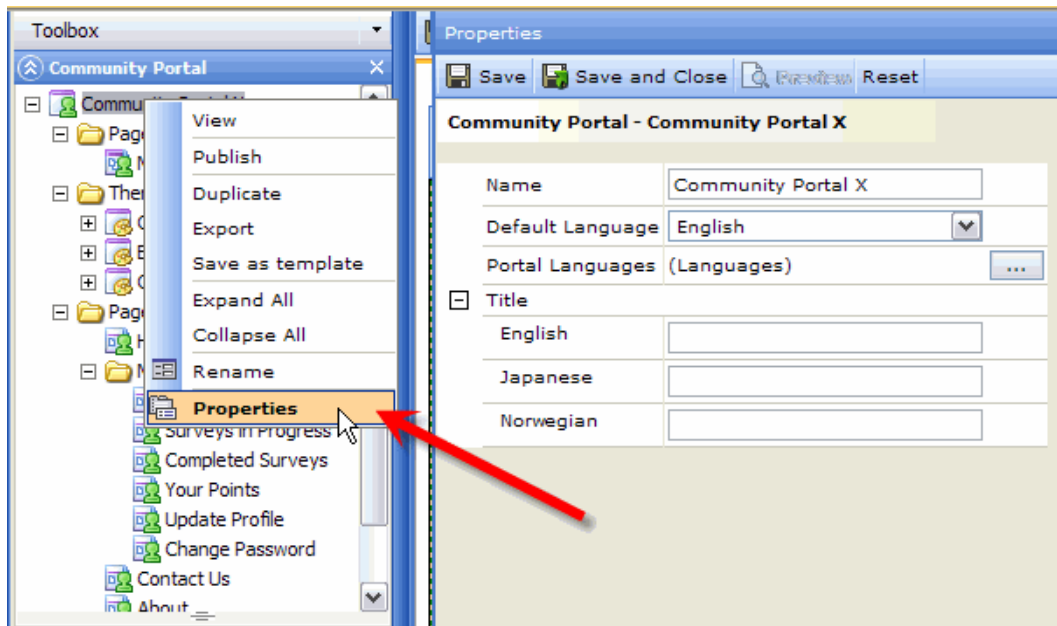


Figure 113: Properties on portal level

The portal **name** is displayed on top of the property sheet. Inside **Portal Languages** you select which languages you want the panelists to pick and choose from. In our example we have selected English, Japanese, and Norwegian. As **Default Language** you specify which of the Portal Languages you want to use default. This language will be used as the first-entry language and whenever another language has not been chosen. Inside 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 like. 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 like.

4.12.4.1 Publish your Community Portal

You can have as many Community Portals you like per panel, but only one of them can be the published one, i.e. the one used publicly for that panel. Whenever you want to publish a portal, you simply right-click on the portal name inside the Community Portal toolbox, and choose "Publish".

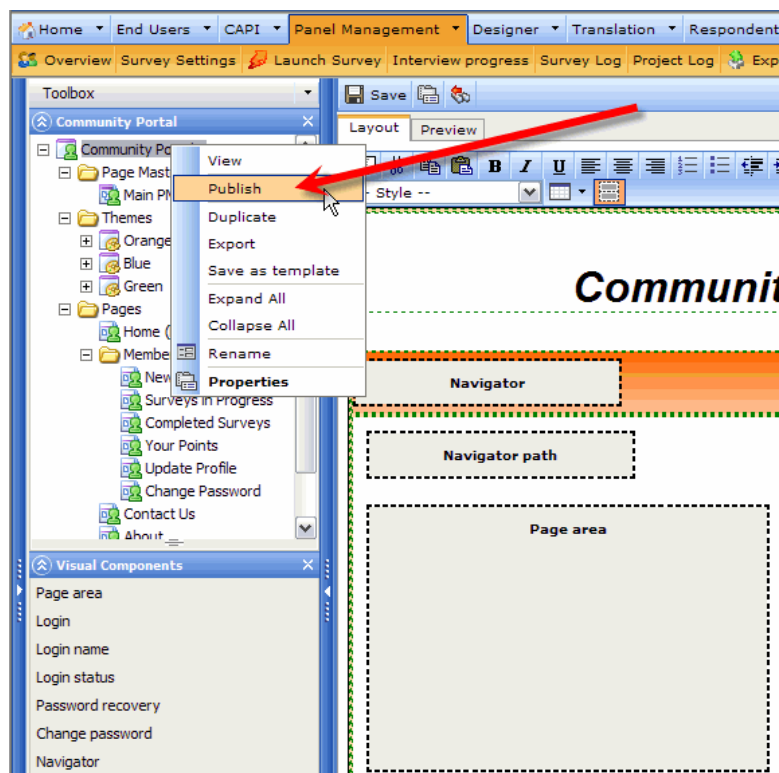


Figure 114: Publish your portal

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 (since only one portal can be the published one at a time).

4.12.4.1.1 Testing your Community Portal

When working with your portals, you often want to test how different portals would work together with your panel. We recommend having all relevant portals added to the panel, and then in preview try the different alternatives. If you would like to make changes to a portal to for instance try a different look or setup, you should duplicate an existing portal instead of starting from scratch (see section 4.12.1 Introduction).

You can also launch your panel in Testing, and publish/test a portal using the test database.

4.12.4.2 Managing your Community Portal within your panel

When choosing "Community Portals" from the menu "Panel Management", Confirmit will list all portals added to the active panel.

Portal Name	Company	Created By	Created	Published	Test Published
Community Portal X	FIRM AS	Merph, John	11/20/2005 5:29:02 PM	11/25/2005 6:46:31 PM	-
My Standard Portal	FIRM AS	Confirmit, user	11/22/2005 11:26:08 AM	-	-
My Unique Community	FIRM AS	Confirmit, user	11/25/2005 2:20:31 PM	-	-
General Portal (White BG)	FIRM AS	Confirmit, user	11/28/2005 10:42:29 AM	-	-

Figure 115: List of portals active on a panel

The list shows when each portal was created and by whom. The currently published portal for this panel is listed is bold, and the time when the portal was last published (on Production database) is also shown. The column "Test Published" shows which portal was last published on the Test database.

4.12.4.3 Managing your Community Portal Templates

The same Community Portal can be used on many different panels simultaneously. Whenever you save a portal as a template (see section 4.12.4.3.1 Save as Template) the portal is stored as a general (global) portal template, which later can be added to other panels. A list of all such global Community Portal templates is found under the “Home” menu, then “Templates” and “Community Portal”.

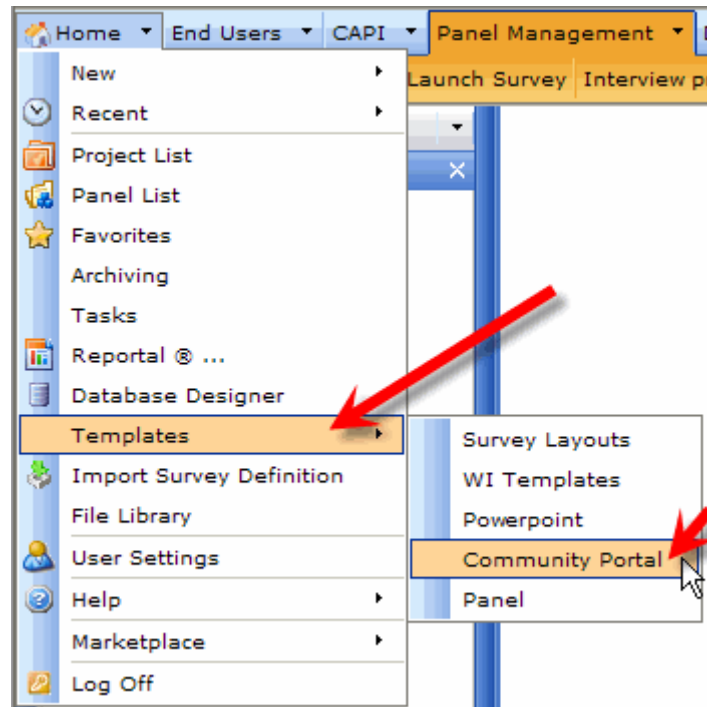


Figure 116: Community Portal templates

Confirmit lists all my Community Portal templates. These are global versions (templates), which can be added to one or more panels.

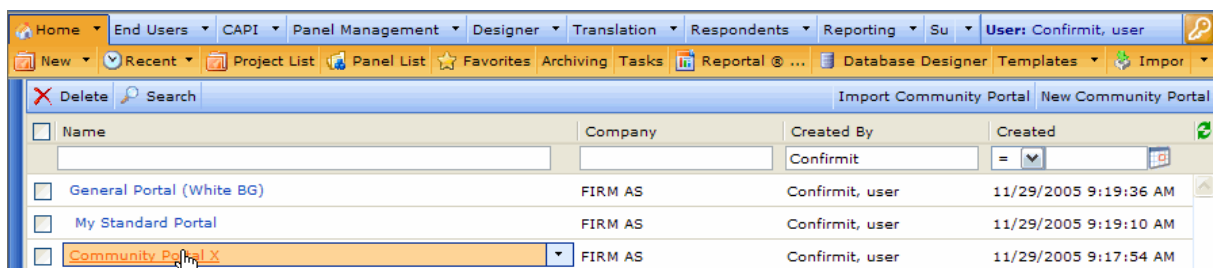


Figure 117: Community Portal template list

When you enter a template, you can right-click the template name and choose “Permissions”. If you do, a list of all Confirmit users in your company shows up, so that you can decide who in your company should have access to use this particular template.

4.12.4.3.1 Save as Template

Sometimes you would like to save a portal as a template for later use. This is very easy. At any time, you can right-click on the portal name, and choose “Save as Template”.

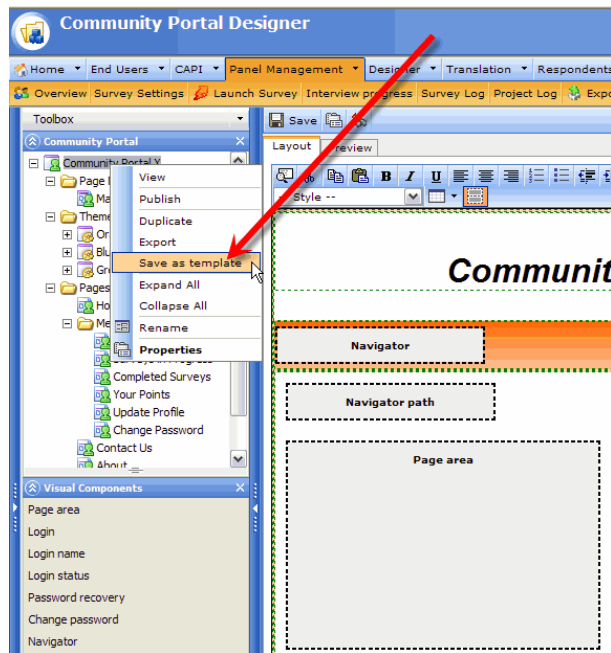


Figure 118: Save as template

An identical copy of the current portal will then be saved as a template. Changing the copy (the template) does not affect the portal you are working on inside the panel 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 whatever table cell you want. You can also insert images inside the cells of these tables.

Alternatively, you decide each Visual Component's positioning and layout through style settings (CSS). See section 4.12.3.2.1 Styles for more information on Styles.

4.12.5.1 Inserting Tables

To build a table, use the Table builder button as shown below (marked 1 is figure below). You can choose the number of cells you want with only two clicks on this button. The figure below shows how a table of 3x3 cells is inserted. You can adjust the table later by adding and deleting rows and columns. The table you create will be inserted where your cursor is placed at the time of this action.

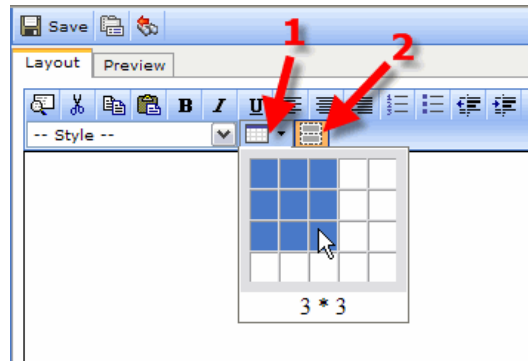


Figure 119: Create HTML Table

While working in the Portal Designer, a dotted grid is displayed as a visual help for you to see the table while editing. The table will not be visible on the portal page. If you like to see the page without this grid, either select preview, or click the "hide grid" button (marked 2 in figure above).

4.12.5.2 Adding Rows and Columns

You can add as many rows and columns as you like to any HTML table. To do this, right-click the cell where you would like to add a row or column, and select "Insert Row/Column" from the dropdown menu appearing. The figure below show how a fourth row is added below the third row.

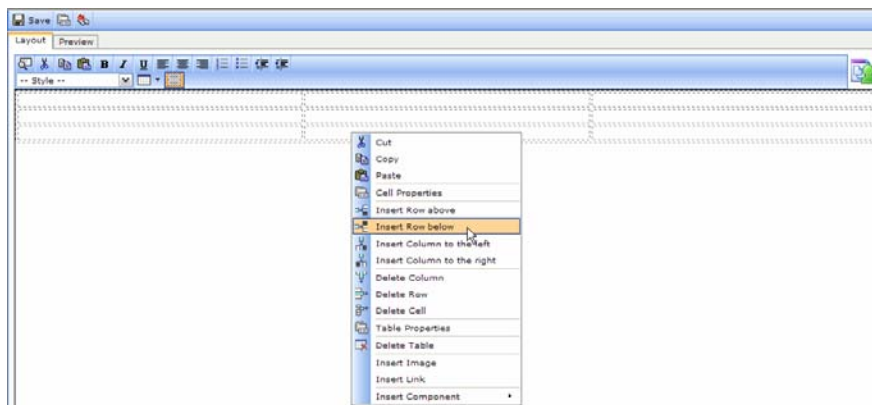


Figure 120: Adding rows and columns.

4.12.5.3 Deleting Table Cells, Rows and Columns

Deleting unwanted cells, rows and columns is achieved in the same method as adding a row. In the figure below, the fourth row is deleted. Simply right-click in the row you want to delete, and choose "Delete Row".

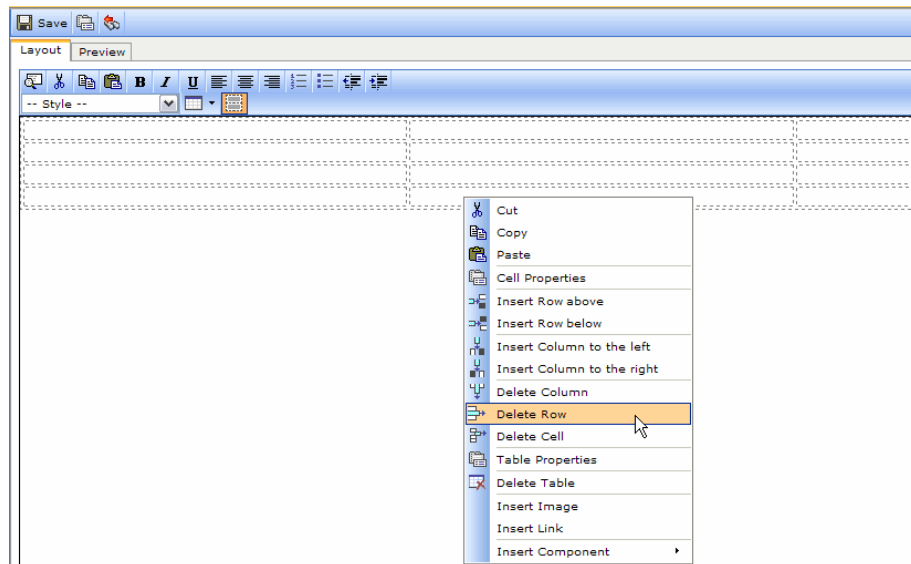


Figure 121: Delete a cell, row or column

4.12.5.4 Table Properties

You can set certain properties for your table(s) by right-clicking anywhere in the table, and selecting “Table Properties” as shown below.

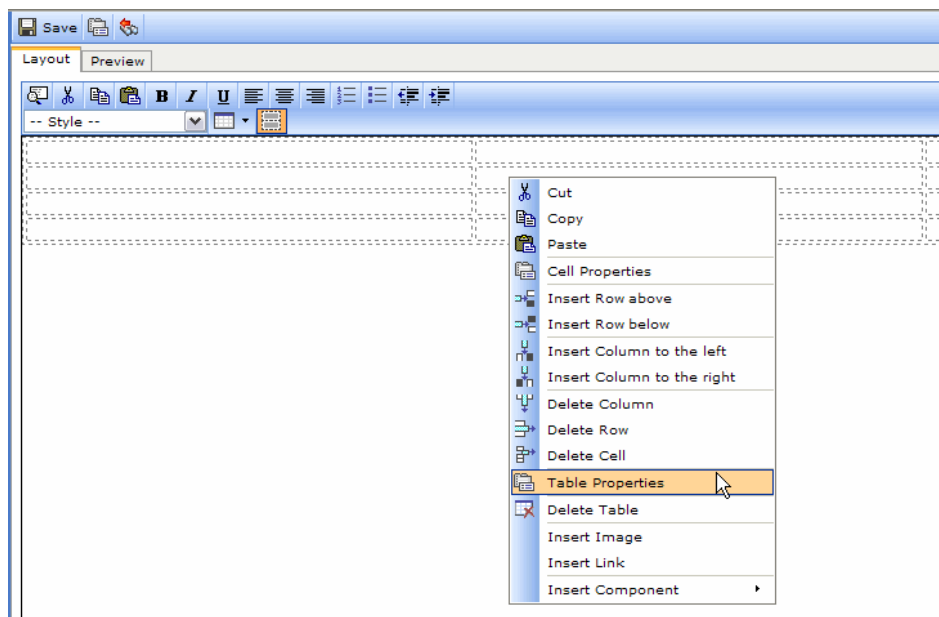


Figure 122: Table Properties

As shown below, a box that enables you to change the properties of your table will appear. To set the **background color** of your table, type in the color code in the BackgroundColor text field or double-click the little square to the right of “BackgroundColor.” Choose a color from the color picker. To activate your settings choose “Apply” or “Apply and Close”.

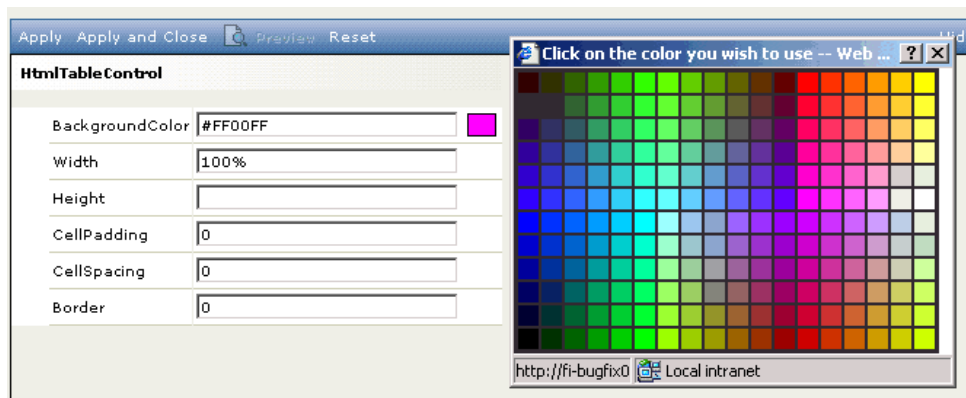


Figure 123: Editing Background Color

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.

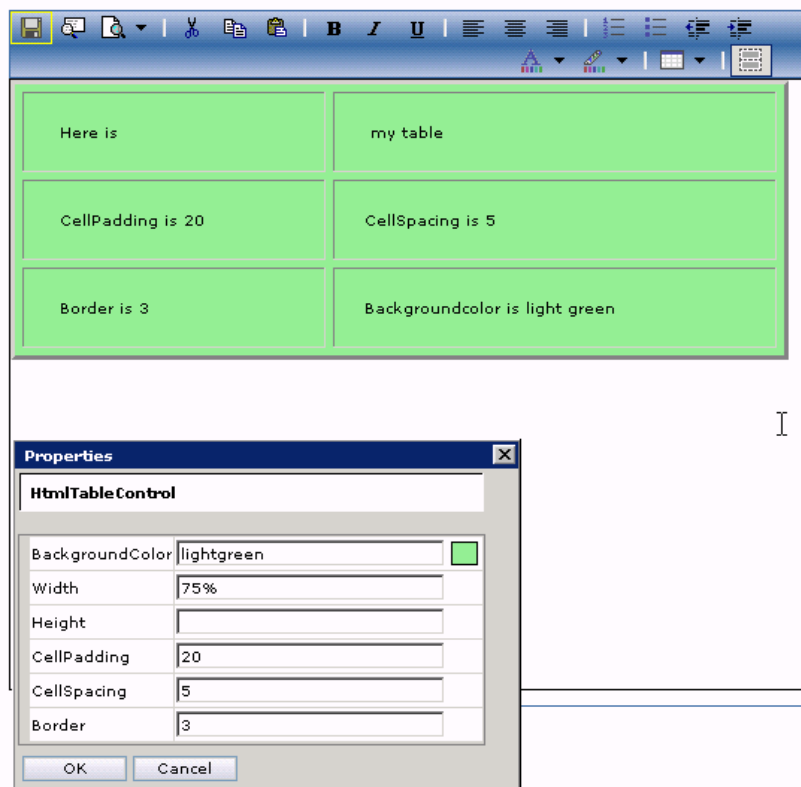


Figure 124: More table settings

Have a look at the table properties above. **Cell padding** and **cell spacing**, as well as, **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.

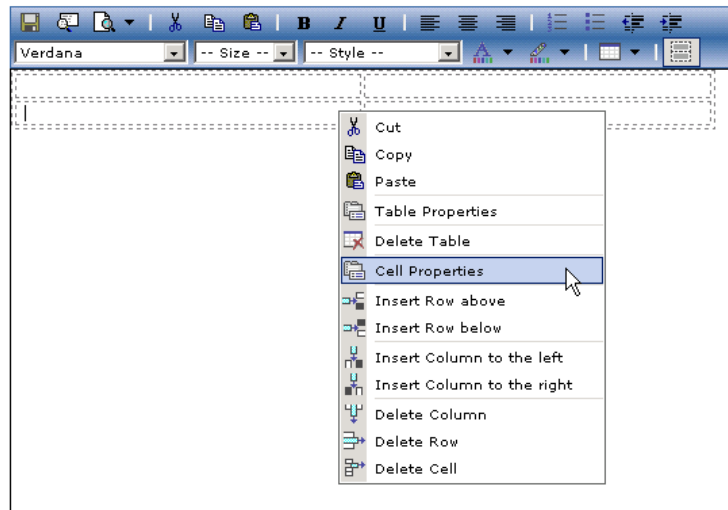


Figure 125: Entering cell properties

The property box shown below will appear.

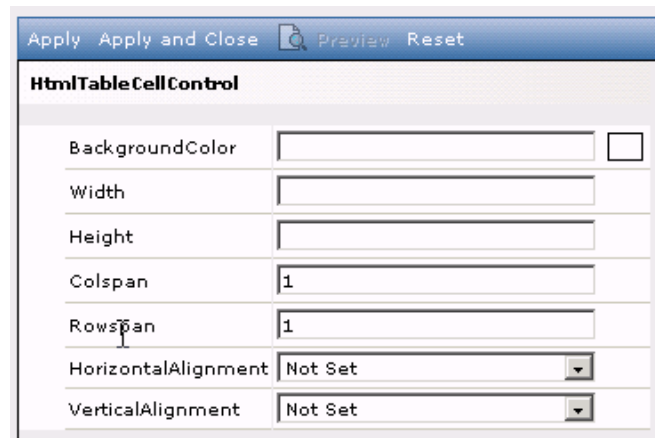


Figure 126: Cell properties

You can change the **background color**, **width**, and **height** as shown in section 4.12.5.4 Table Properties. Be aware that changing these might influence the formatting or appearance of the other cells in the same row or column. If you want 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.

In the figure below we have two rows. Let us say we want to merge the bottom two cells of the table. To do this, we set Colspan (via Cell Properties) in the bottom left cell to 2. As the figures show, we then get a cell that spans two columns, thus pushing the cell that was the bottom right cell into a third column, like this:

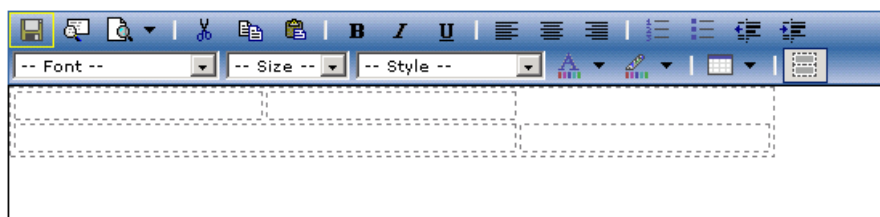


Figure 127: Colspan is set to 2 in the bottom left cell. This pushes the bottom right cell into a third column.

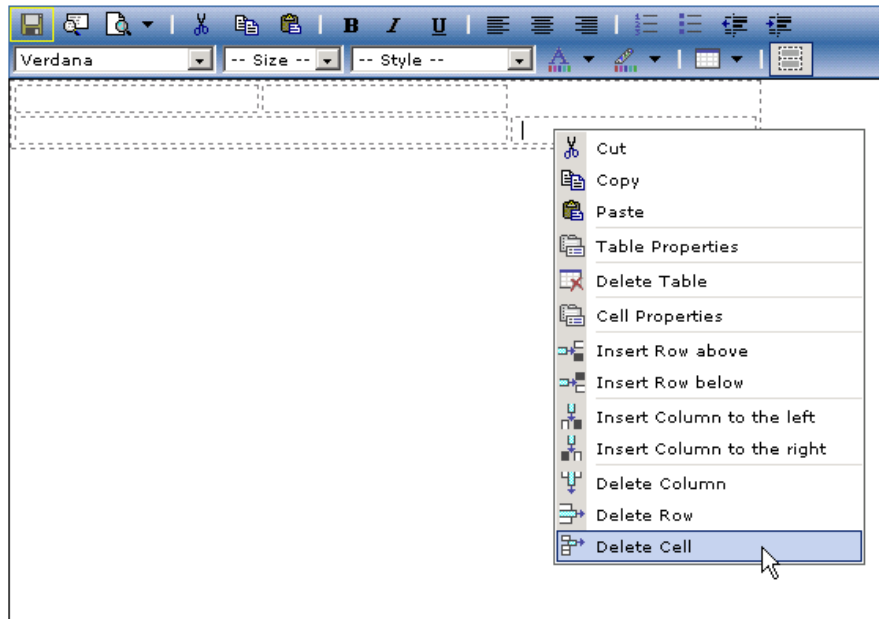


Figure 128: Deleting a cell

To remove the “third column,” which is really not a column but only the one cell pushed to the right, simply right-click in that cell and choose “Delete Cell” as shown above.

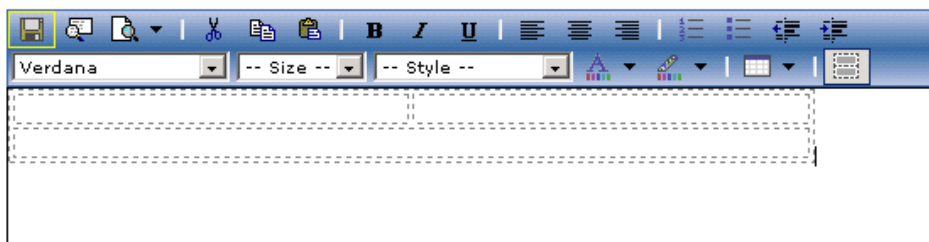


Figure 129: Merged cells

4.12.5.6 HTML Mode

When building your portal pages, you normally work in WYSIWYG mode (what-you-see-is-what-you-get) – as we have been doing so far in this chapter. Users who are familiar with HTML coding can switch to HTML mode at any time. The figure below shows how to toggle between the modes.

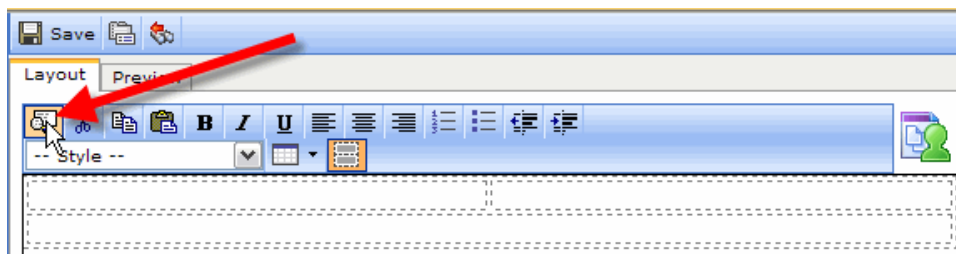


Figure 130: Switching modes

The figure below shows the table in HTML mode. You can at any time toggle back to WYSIWYG mode by clicking the same button.

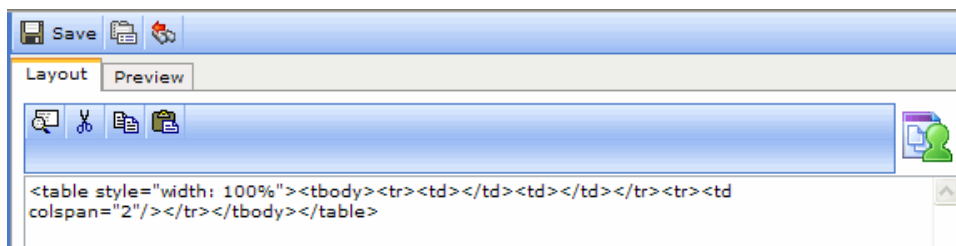


Figure 131: HTML mode

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 any kind of free-form text on a portal page. You simply 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 options 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" will insert a paragraph break (<p></p>) and "Shift-Enter" will insert a line break (
). If you paste in pre-formatted text from for example MS Word or other web pages it will keep the formatting.

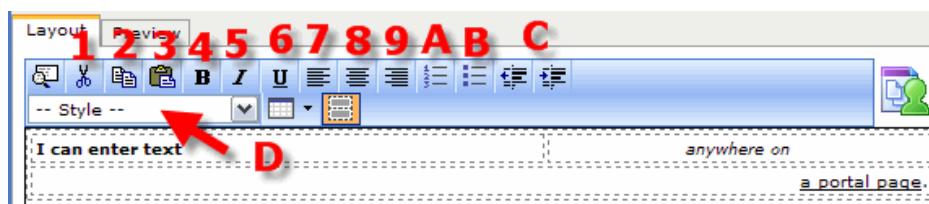


Figure 132: Formatting free-form text

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 (see section 4.12.5.6 HTML Mode) simply **enter the HTML code** (img tag) at the location where you want to insert the image. If you are in WYSIWYG mode (see section 4.12.5.6 HTML 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 where you want the image to be on a page, like the figure below shows. Be aware that if the image you want to use is a hyperlink you must copy and paste it into the report, and not **drag-and-drop** it, since drag-and-drop of 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. The images will not be moved to the Confirmit site, there will just be an image tag referring to the original location of the image.

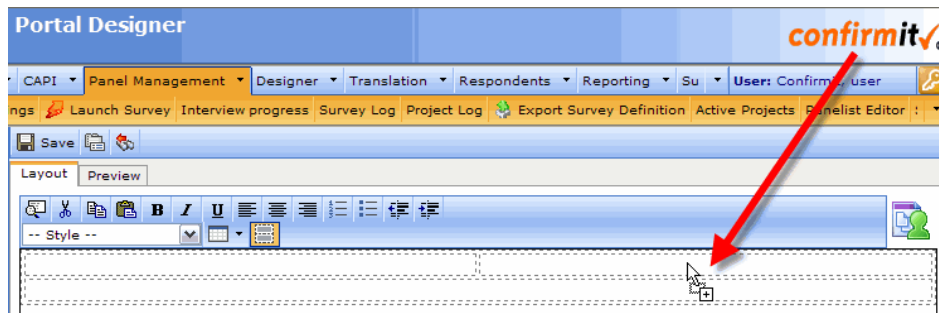


Figure 133: Drag-and-drop an Image onto a page

When the image is dropped, the page will look like this:

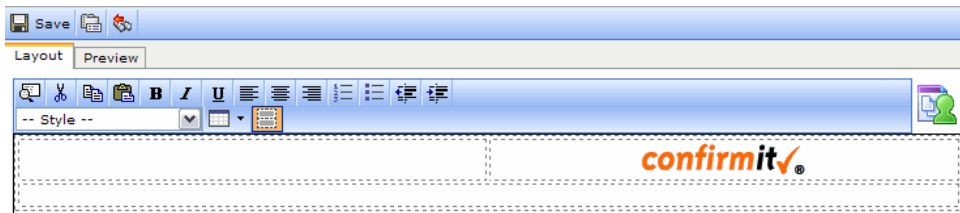


Figure 134: Image inserted

You can also right-click in any table cell to insert an image, and select "Insert Image".

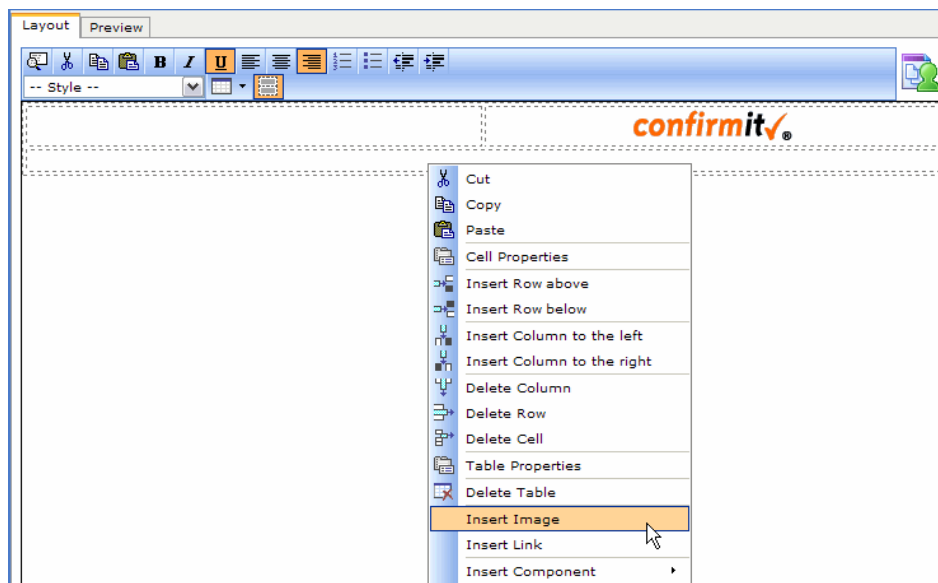


Figure 135: Insert image by right-clicking in a cell

This will bring up the property frame on the right hand side of the screen where you can specify 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 136: 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 definitions from one Confirmit server to another. See section 6.4 Export Survey Definition for more details about how to export a survey.

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**.

Enter the file to import in the text box below or press **Browse...** to locate it.
When you have selected the correct file, press **OK** to schedule the job

Figure 137: Survey Import

2. Click **Browse**, and then select the local XML file or a zipped XML file (.zip) on your computer.
3. Then 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, and not response data. To import or export response data, see section 25.3 Data Transfer.

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 Figure 138.

User Settings
Edit your personal settings

Save Save and Close Close

Personal settings for usermanual

User name usermanual

User key VTUOTCUZUCMIHIBBPSJXCTKM [Copy to clipboard](#)

First Name Adam

Last Name Apple

E-mail nigel.bennett@confirmit.com

Language English

Send email if task aborts ☐

Send email on successful sampling ☒

Hide title and description ☐ *Browser will be refreshed*

Use HTTPS connection ☐ *Will take effect on next login*

VSFlexGrid Pro answer list (ActiveX) settings

Answer list font

Use unicode answer list ☒

Online Coding settings

Coding screen size 15

Working set size 1000

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

© 2007 FIRM

Figure 138: 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 your User Settings.
- **Coding Screen Size** – specify the number of answers that will be shown on the Coding Window screen. This number will also be specified on the back and forth buttons, for example prev 10, next 10. See chapter 17 Online Coding Tool.
- **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. See chapter 17 Online Coding Tool.
- **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 with server installations may choose whether they want to have access to our extranet, or to have the last updated Help page in Confirmit on their server.

Home > Help > Language overview – The same list as Appendix B in this User Manual, that is, a list of languages that are available on the On-Demand server.

Home > Help > About – information about the Confirmit build you are using.

4.16 Exiting Confirmit

Log off Confirmit by clicking *Log off* in the Home dropdown menu or on the key symbol in the upper right corner.

When you click on the *Log off* button, you will be brought to the Login page.

5 File Library

File Library is functionality by which Confirmit users are allocated their own domain where they can store files smaller files to be used in surveys or reports.

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

1. File Library is built to store images in the 10kb - 1MB range. File Library is not built for uploading and storing large files. On the ASP, the upload limit is set to 10MB, however we recommend you upload only files considerably smaller than this.
2. For On-Demand Clients, you are only allowed to refer to files in File Library from surveys or reports running on the Confirmit ASP.
3. 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 Company and is therefore at your own risk.
4. 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.
5. If you plan to use audio / video files in surveys and reports, Confirmit Company 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 Company 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.

You can access the File Library either via the Home menu or by clicking the File Library link in the Quick Pane menu.

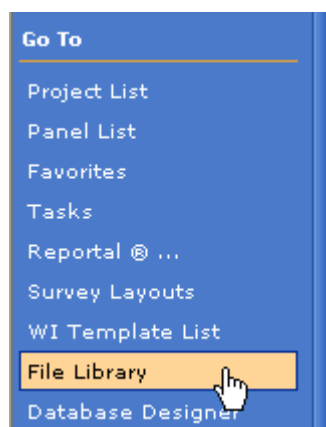


Figure 139: File Library In Quick Access Pane

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

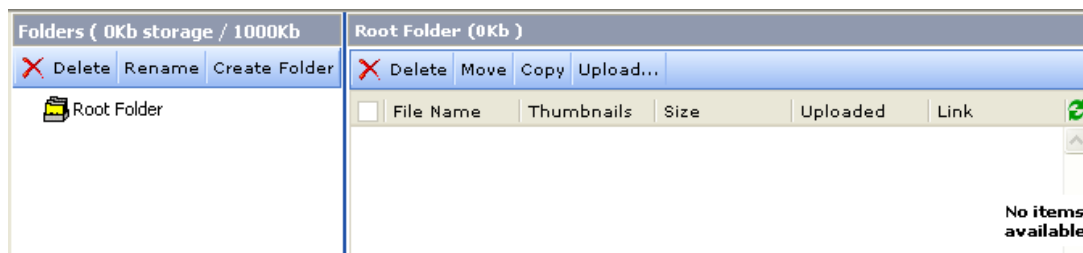


Figure 140: File Repository

The area 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 with more than one user, 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 used in the repository and the total space allocated are displayed towards the left side in the upper frame of the window. In this example the values are 0kb and 1000kb respectively.

Towards the right side are displayed the name of the active folder and the storage space used by the files in this folder. In this example these are Root Folder (0kb).

5.3 Uploading Files

Assume that you are one of the users in a company, and you wish to upload some pictures into the File Library.

1. You should first create your own folder - either click the **Create Folder** button or right-click on the **Root Folder** and choose **Create Folder** from the menu.

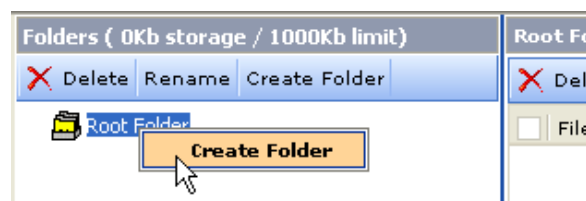


Figure 141: Creating a new folder

A new folder is created and activated.

2. Rename the folder to something logical - 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.

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.

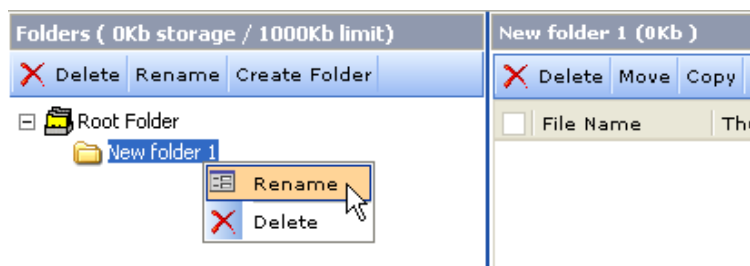


Figure 142: Renaming the new folder

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



Figure 143: 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 Figure 144.
5. Browse to the files you wish to upload, then click **Upload**.
You can select and upload up to five files simultaneously.

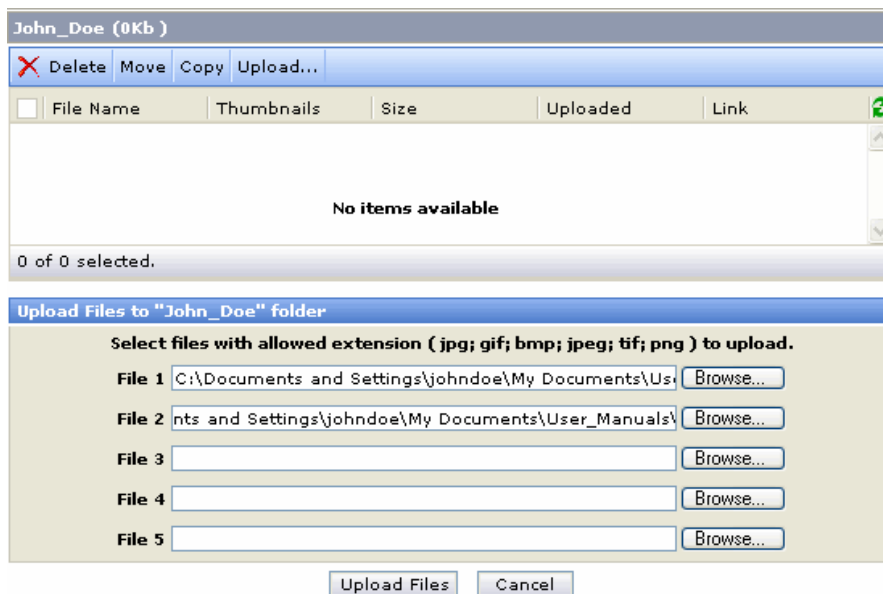


Figure 144: Uploading files

The files will be uploaded and displayed in the frame above. The file name, its thumbnail view, its size, the date when the file was uploaded, and the link to the file, are displayed.

John_Doe (106Kb)				
☐ Delete ☐ Move ☐ Copy ☐ Upload...				
☐ File Name	Thumbnails	Size	Uploaded	Link
☐ moon.gif		35.31Kb	09/28/2005 19:30:...	View
☐ sea.gif		35.31Kb	09/28/2005 19:30:...	View
☐ sunset.gif		35.31Kb	09/28/2005 19:30:...	View

Figure 145: Example of uploaded files

The volume of the storage space used is specified in the grey bar at the top of the frame. In the example in Figure 145, 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.

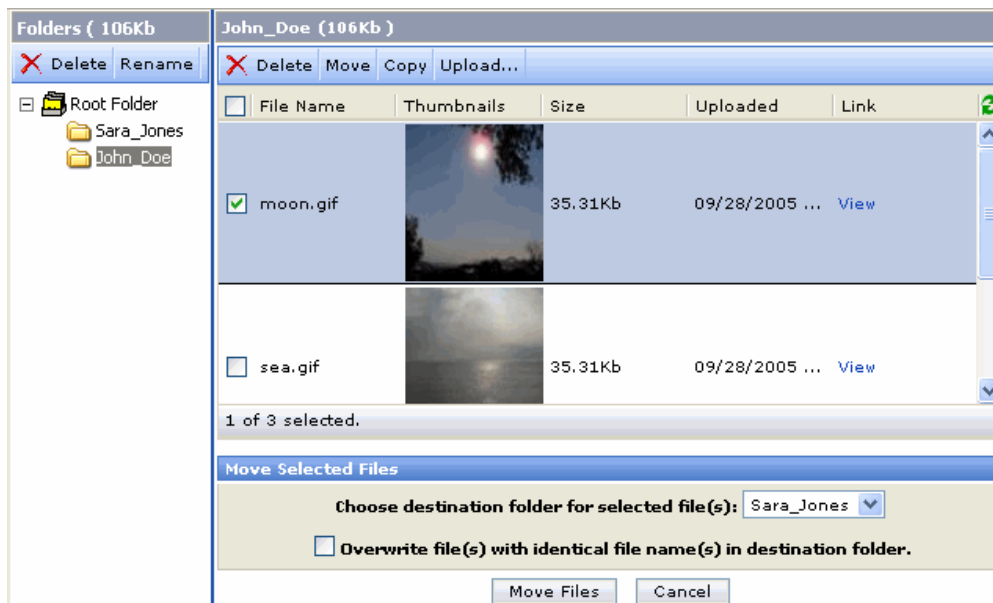


Figure 146: Moving files

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**.
5. 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 Files in CAPI Surveys

Note: Confirmit CAPI is a chargeable Add-On.

If you have 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 they are used only in this one project, or “CAPICommon” if they are shared across several CAPI surveys. See Figure 147 for examples.

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

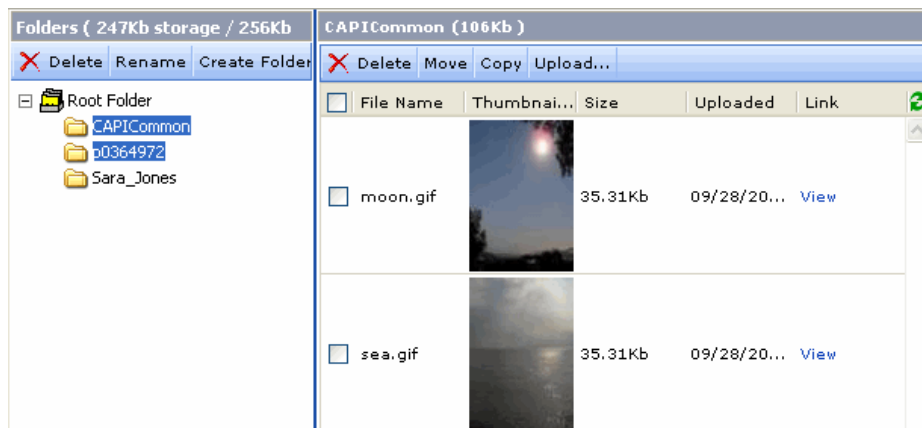


Figure 147: Files Used in CAPI Surveys

6 Project Management

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

6.1 Overview

A new blank project may be initiated by clicking *New > Project* from the Home menu page, or by selecting **Create New > Project** in the quick access pane. You can also initiate a new project by clicking the New Project button in the upper right corner of the Project list. In the next step you will be asked to name the project and select the WI template or Survey Layout for the survey (See section 4.11 Templates). You will also be able to decide to base the new project on existing questionnaire templates.

The form titled "Name" contains the following elements:

- Project Name:** A text input field containing "Global Employee Survey".
- Project Template:** A checkbox labeled "Base project on an existing project template", which is currently unchecked.
- Layout:** Two radio buttons: "Use WI Template" (selected) and "Use Survey Layout" (unselected).
- WI Template:** A dropdown menu with a downward arrow.
- Buttons:** "Cancel", "< Back", "Next >", and "Finish".

Figure 148: Name the project

Click the Next button to go to the page where you can choose the project languages (you will be able to add more project languages later). Once you have selected the languages, click **Finish**. The **Project Management > Overview** page opens at the General tab.

If you choose **Use Template** and click **Next**, the projects that you have marked as Templates will be displayed.

Project ID	Project Name	Keywords
p0007383	Employee Satisfaction Survey	Template
p0007420	Customer Satisfaction Survey	Customer;Template

Figure 149: Select project template

Choose a project template, and click **Finish**. The template will be copied and added to the project list with the new name, and you will be brought to the Overview page for the new project. Note that the project will inherit the user-defined categories.

6.1.1 General

This is the page you are brought to when you click on Overview.

Figure 150: Project overview page

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. See section 6.5 Confirmit Express for further information.

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

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

- **Project ID** – system-generated unique identification number.
- **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 Reportal User Manual). 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.

In addition to these 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).

- **Status** – the project status. (See section 6.1.4 Project Status.)
- **Deployment** – the survey type (Public/Limited/Pop-Up) Web Interview. The Open link to the survey will be displayed next to the survey type.

- **Enforce HTTPS in Advanced Reporting** – check this option to enforce HTTPS use in Advanced Reporting, accessing reports via Enduser interface, for this 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.

The following information fields will be displayed to users with Project Administration permissions (Project Creators) to a project.

The screenshot shows two sections of the Project Overview page. The first section, 'Project titles', has a blue header with an expand icon. It contains two text input fields: 'English' with the value 'Example Survey' and 'Norwegian' with the value 'Eksempel'. The second section, 'Project info fields', also has a blue header with an expand icon. It contains two date pickers: 'Start date (yyyy-mm-dd)' and 'End date (yyyy-mm-dd)', each with three dropdown menus for year, month, and day. A 'Save' button is located at the bottom right of the 'Project info fields' section.

Figure 151: Project Titles and Info Fields

Field	Description
Title	The title of the project, which you want to be displayed in the survey (add primitive ^SNAME^ in the template, see section 4.11.1 Web Interview Templates 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 will have to do that manually in Project status. See section 6.1.4 Project Status.

Table 5: Project Titles and Info Fields

The screenshot shows the 'Administrator info' page with a blue header and an expand icon. It contains a list of 15 statistics, each with a text label and a corresponding numerical value in a column on the right. The statistics are: Complete responses, Incomplete responses, Size of database data, Size of database log, Questionnaire last modified, WI last generated, DB last generated, Last response, Reporting last accessed, Project info last updated, Data growth last day, Log growth last day, Data growth last week, Log growth last week, Data growth last month, and Log growth last month. A 'Refresh' button is located at the bottom right.

Figure 152: Administrator Info

Field	Description
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 since last day
Log growth last day	Growth in database log size since last day
Data growth last week	Growth in database data size since last week (7 days)
Log growth last week	Growth in database log size since last week (7 days)
Data growth last month	Growth in database data size since last month (same day last month)
Log growth last month	Growth in database log size since last month (same day last month)

Table 6: Administrator Info Fields

Figure 153: Check Growth

Field/Button	Description
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

Table 7: Check Growth Fields

6.1.2 Permissions

When you click on the *Permissions* tab, you are brought to the following page:

Figure 154: Object Permissions

Field	Description
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 the permission to administer the opentext coders for the current project.
Opentext coder	The user has the permission to code open-ended questions in a specific project. See chapter 17 Online Coding Tool.

Table 8: Object permissions

For all projects, the user who creates the project is the project administrator and owner. A project is initially invisible to all other Confirmit users. All Confirmit users in your organization will be listed in *Object permissions*. The project administrator may set up other Confirmit accounts with permissions to view the new project.

On-Demand only: Personnel at Confirmit Company may be granted access for support purposes.

Initially, only users and groups within your organization are listed on the "object permissions" page. However, more users may be added by supplying Confirmit with correct user keys of these users. Typically, an external user will send you his or her user key by email; this key is then copied and pasted into Confirmit by clicking the *Add users* button at the bottom of the *Object permissions* page.

After having clicked on the *Add users* button the project manager will be brought to the following Add New Users field when he/she can paste in the user key, and then click *Add*.

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

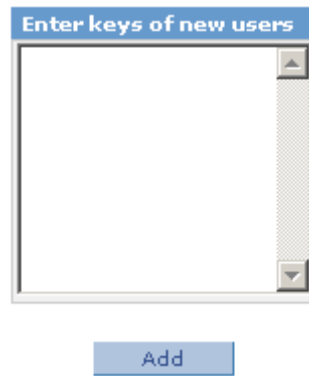


Figure 155: User Key Entry Window

After having clicked *Add* the project manager will be brought back to the *Object permissions*, and the newly added user will be displayed in the *Other users* field.

Second Wave Customer Satisfaction

User ID	Last Name	First Name	-	R	W	D	Administrate projects	Online coding administrate	Opentext coder
									Search
Users in company									
johndoe	Doe	John		☐	☐	☒	☒	☐	☐
standard1	Jones	Sarah		☒	☐	☐	☐	☐	☐
Groups									
Other users									
alexcarp	Carpenter	Alex		☐	☐	☒	☐	☐	☐

[Add users] [Remove users]

Figure 156: A New User Added to Other Users

You can also remove users from Other Users by clicking on the Remove users link, and then choosing the users to remove.

6.1.3 Active Languages

On this page all project languages in a multilingual project will be listed. You can work with 5 languages at the same time. You can select and deselect languages by checking/unchecking the check-box.

6.1.4 Project Status

On this page you can set the project status.

Figure 157: Project status

Production: The survey is running.

Closed: The survey has been closed. Respondents will not be able to enter the survey, and the following message will be displayed to them.

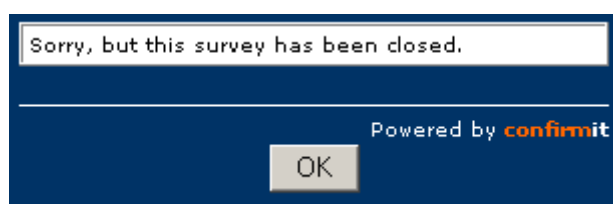


Figure 158: Survey Closed Message

You may later reopen the survey, if 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

You have the opportunity to control which website the respondents will be sent to, when they have finished the survey. When you click *URL Setup* tab, you will be brought to this page.

Figure 159: URL setup

Field	Description
Help link	In this field you enter a URL address to a website you wish to use either for additional

	information or for another purposes in the questionnaire. In this case you have to have included primitive ^ HELP^ in the WI template you will apply to this survey. Clicking on <i>Help</i> link in a survey will open a new browser window.
End link	In this field you enter the URL address of the website you wish the respondents to be sent to after they have finished the survey.
Text	In this field you may control the appearance of the <i>Help</i> link, i.e. you may substitute the address with another text.
Link preview	In this column you will get a preview of the link.

Table 9: URL setup

If you use Unicode languages in the URL Setup textfields, you will have to translate the unicode text into HTML code first by using Unicode Translator in a Script node (See section 12.9.1 Unicode Translator in Script Nodes). 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

It is possible to duplicate projects in Confirmit by clicking *Duplicate* button in *Overview*. The system duplicates the entire questionnaire routing and Online reporting reports.

You may afterwards modify the questionnaire.

The response data from the original survey are not duplicated to the copy of the project.

6.1.7 Delete 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.

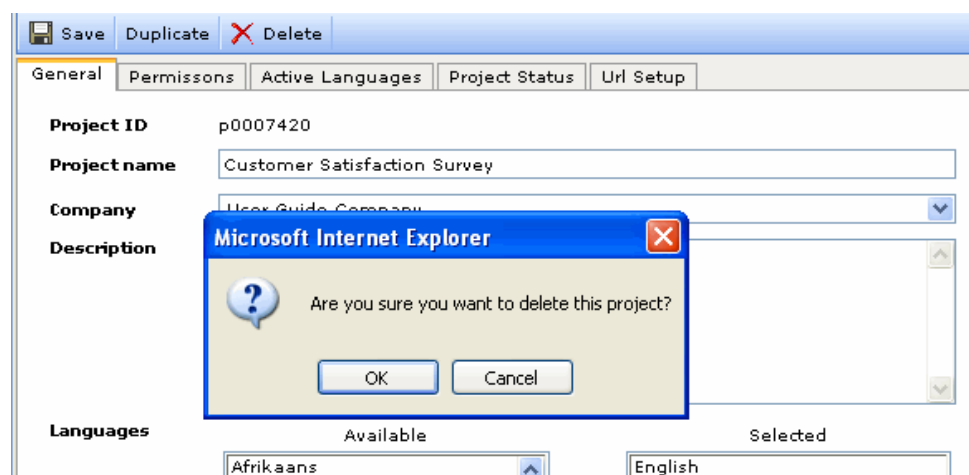


Figure 160: Deleting a project

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

Note: This is an irreversible action.

6.1.8 Recurring Tasks

If there are recurring tasks defined in a project (published reports, emailing, etc.), a link leading to Task management will be displayed. It will be stated how many recurring tasks there are in the project.

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 picture below shows the interview progress page of 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 161: 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. In *Project Log* you will have an overview of all changes that have been made on the project. The system records the exact time when changes are made, the user who makes the changes, and specifies every change.

p0011200		
Project Log		
Date	User	Event
Log Entries		
24.mai.02 13:33:50	Manual, User	Project created.
24.mai.02 15:45:38	Manual, User	[, Property "randomize", q2, , false]
24.mai.02 15:45:38	Manual, User	[, Property "recodevar", q2, , false]
24.mai.02 15:45:38	Manual, User	[, Property "backgroundvar", q2, , false]

Figure 162: 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 Confrimit server to another.

You can take advantage of Confrimit'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 Confrimit 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.

The screenshot shows a dialog box titled "Export Properties". It contains the following fields and values:

- Project ID:** p0107973
- Project Name:** p0107973
- Recipient email:** usermanual@firmglobal.com
- Comment:** (empty text box)
- Start time:** ASAP (dropdown menu)

An "OK" button is located at the bottom center of the dialog.

Figure 163: 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 Confrimit Express

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

CAPI/Kiosk | Project Management | Designer | Translation | Respondents | Reporting | Survey

Launch Survey | Interview progress | Project Log | Export Survey Definition

Save | Duplicate | Convert to Confirmit Professional | Approve Survey | Deny Survey | Delete

General | Permissions | Active Languages | Project Status | Url Setup

Project ID p0549121

Approval State Pending Approval

Approval State Changed Tuesday, January 23, 2007, 11:15:32 AM

Project Name Newspaper Survey

Company FIRM AS

Description

Figure 164: The Project Overview General tab for an Express project

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 sent.
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.

7 Designing Questionnaires

In Confirmit, there are two types of questionnaire designers 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

You create a questionnaire as a list of consecutive objects. To access a questionnaire, select a project from the Project List and go to the **Designer > Professional Designer** menu command.

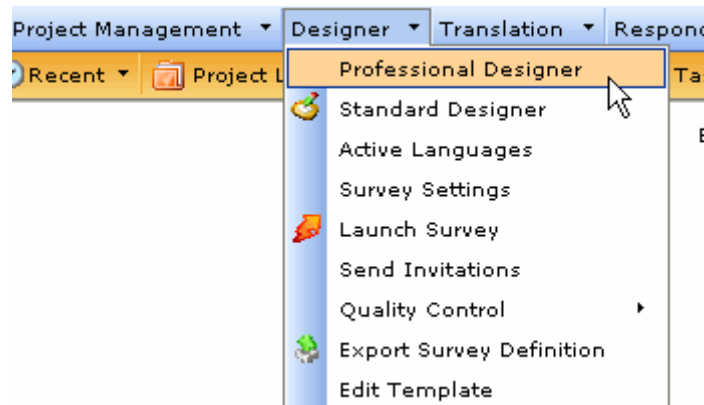


Figure 165: Entering Professional designer

Assuming you have selected a new project, empty questionnaire will open. Note the three toolboxes: Questionnaire tree, New Objects, and Secondary Project, in the Toolbox column. Refer to section 3.2 for more information on the toolboxes.

7.2 How to Add New Objects to the Questionnaire Tree

There are two methods of creating forms in the questionnaire:

1. **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.
2. **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.

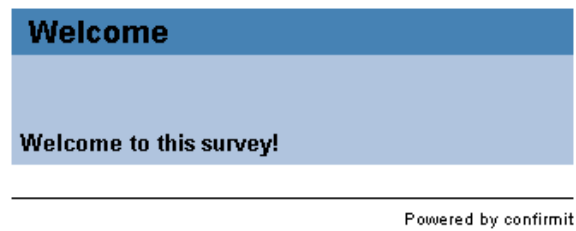
When you choose **Properties** from the menu, both the text fields and the property sheet for the question will open.

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.
- **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.

- **Open** – An open-text question in which the respondent can type in his or her response.

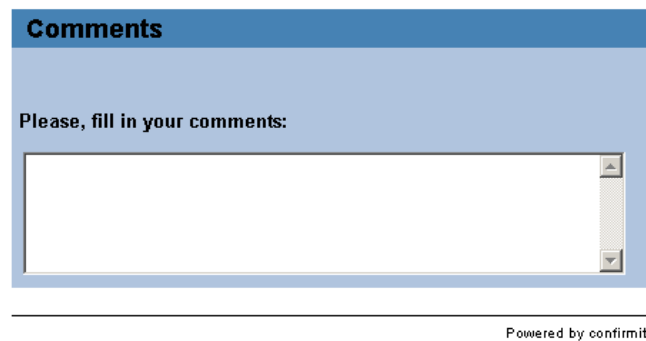


Welcome

Welcome to this survey!

Powered by confirmit

Figure 166: Example of an Information form

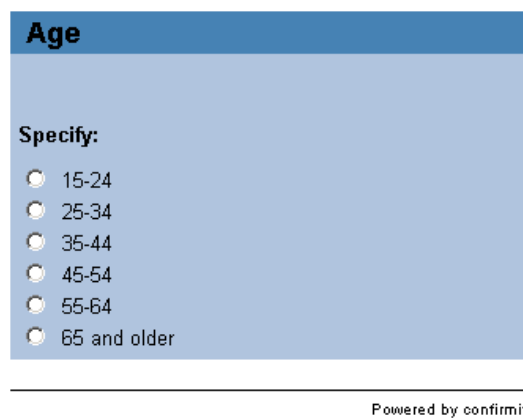


Comments

Please, fill in your comments:

Powered by confirmit

Figure 167: Example of an Open form



Age

Specify:

☐ 15-24

☐ 25-34

☐ 35-44

☐ 45-54

☐ 55-64

☐ 65 and older

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Figure 168: 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.

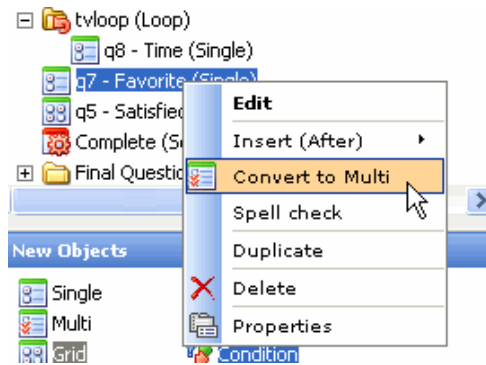


Figure 169: Converting to Multi

Cars

Which have you testdriven?

☐ Volvo

☐ Saab

☐ BMW

☐ Audi

☐ Ferrari

☐ Fiat

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Figure 170: 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.

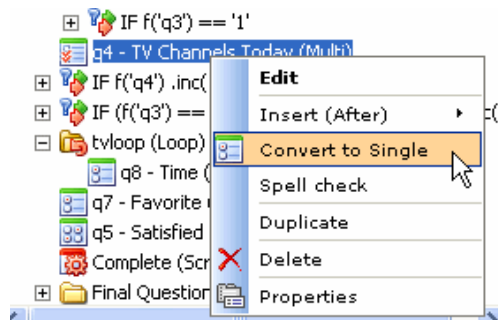


Figure 171: Converting to Single

Rank

Evaluate the cars:

	Poor 1	2	3	4	Excellent 5
Volvo	☐	☐	☐	☐	☐
Saab	☐	☐	☐	☐	☐
BMW	☐	☐	☐	☐	☐
Audi	☐	☐	☐	☐	☐
Ferrari	☐	☐	☐	☐	☐
Fiat	☐	☐	☐	☐	☐

Powered by confirmit

Figure 172: Example of a Grid form

7.2.2 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 hand 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 (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 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 Overview page and only the General and Active languages tabs will be displayed.

Figure 173: Read only access - Overview

7.2.3.1 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. See APPENDIX C: RESERVED KEYWORDS to avoid using reserved keywords as question ids. The data are stored in the database with variable names constructed in the following fashion:

- **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 is the content.

- **Multi** - One column per answer alternative. Tag is equal to: question id_precode of the answer alternative. 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). 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.

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! For example, if you introduce a new form between forms q5 and q6, q5 being a multiple question, do not label the new form q5_2, as this is the code for the second alternative in the original question q5.

If you change 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 or Excel, or ASCII Tab separated or comma separated files. For Fixed width ASCII files, these variable names will be used in the definition file.

Constrain length of ID to 8 characters if you want to use the ID as column-name in SPSS when exporting data to this format. For multi-questions and grids, you should try to constrain length to 5 or 6 characters depending on the length of precodes, because column names are constructed like this: question id_precode.

7.2.3.2 Text

On this page, you supply the text of the form, along with 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 7.2.3.9 Languages.). See section 3.7 Question and Answer Editing Modes for information about the two different editing modes of 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. See section 4.11 Templates)
Text	The form text. (In templates, you may use the primitive ^FTEXT^ where you want to insert this text. See section 4.11 Templates)
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. See section 4.11 Templates)
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 textboxes, 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.

Table 10: Text page

In all text fields in a questionnaire (title, text, instruction) and answers, it is possible to include images, as well as format the layout (for example underline the text) of the text by adding HTML codes directly into the textfields or answer cells in the HTML editor mode. In WYSIWYG editor mode you will be able to format the text by using the toolbar.

You can for example make a reference to an image by including the following tag in a text field's or an answer's cell:

`.`

To include a logo in a question when working in WYSIWYG editor, drag the logo into the textfield or answer cell. You can also copy and paste the logo into the textfield. In picture below the Confirmat logo is dragged into the Text field of a question.

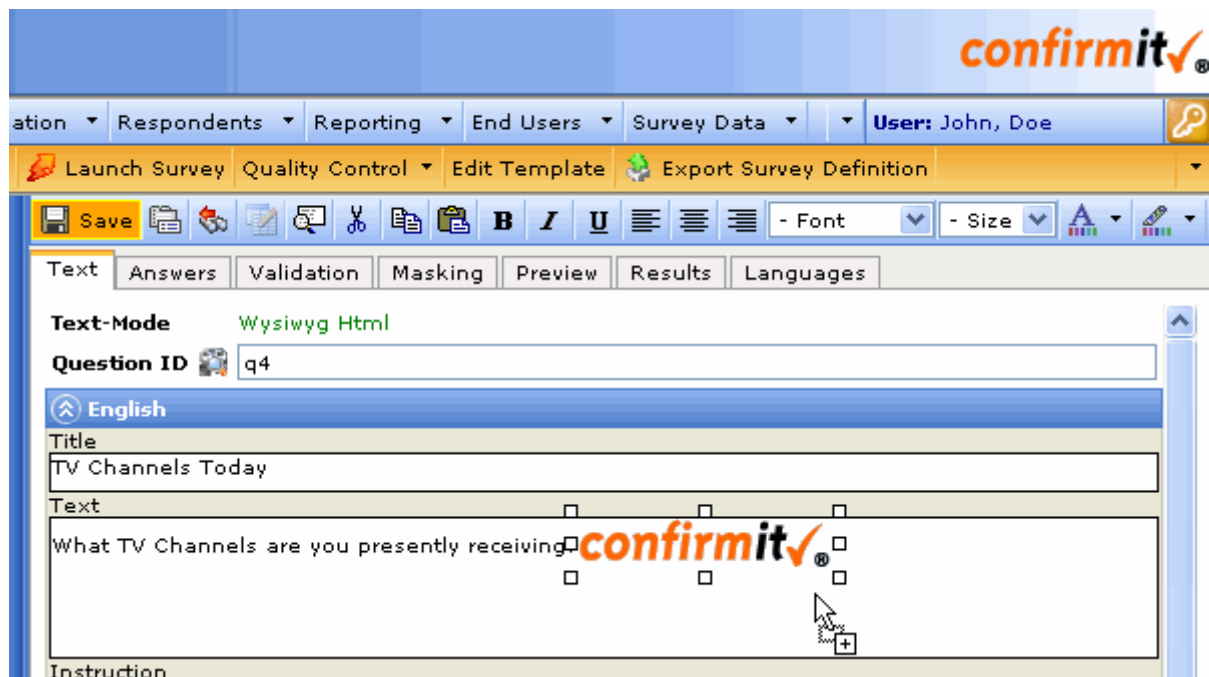


Figure 174: Dragging logo into textfield

Note: When you are running surveys from a secure site using SSL and 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.

7.2.3.3 Answers

[Not available for Info-objects and Open-objects]

Use this page to define the list of answers, or categories, for a question. 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.

See section 3.7 Question and Answer Editing Modes for more information about the two input modes.

The picture below shows the ActiveX answerlist. This will be the default answerlist if the user's browser supports ActiveX. If the user's browser does not support ActiveX answerlist, a warning will be displayed and the user will have two choices: to download the FlexiGrid component, or to switch to the DHTML answerlist.

ActiveX input mode supports long answerlists. However, if the answerlist contains several hundred items, we would recommend using the Table lookup functionality that Database Designer offers. See chapter 9.

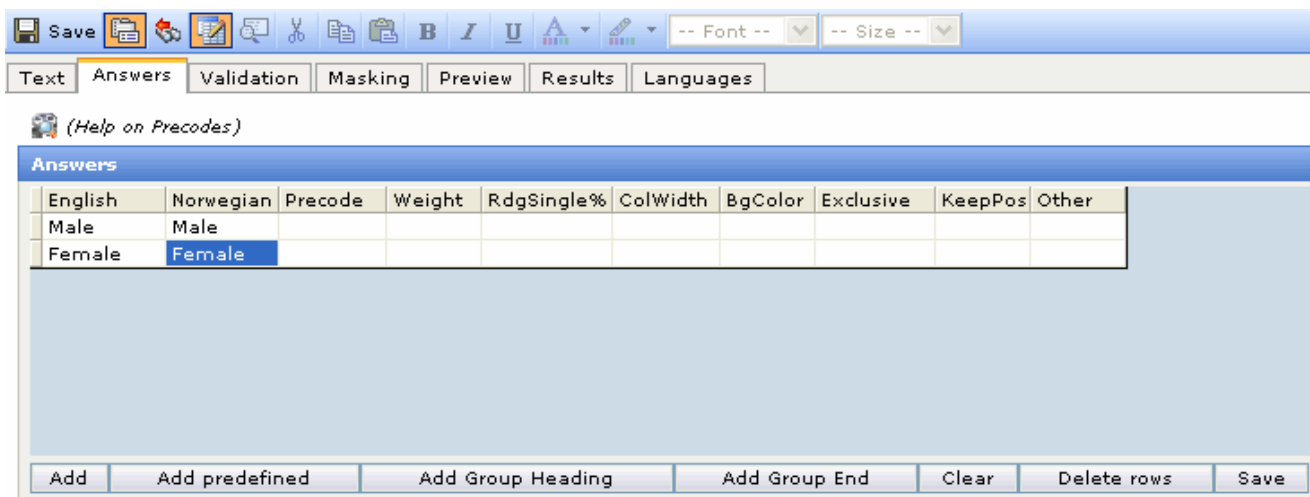


Figure 175: Answers page – FlexiGrid Component

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

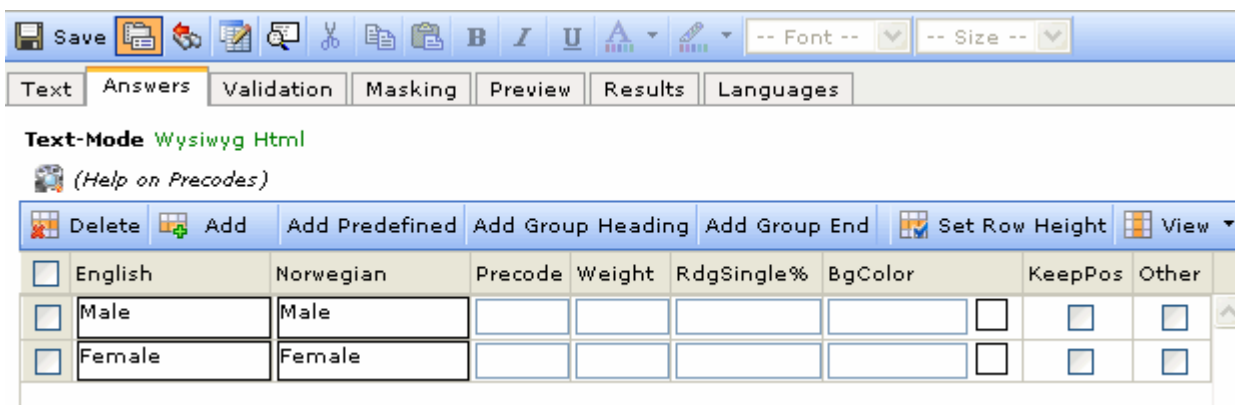


Figure 176: Answers page - DHTML input mode

Note: This input mode does not support long answer lists. The maximum number of items is 100. An error message will be displayed if you attempt to add more items to the list.

Click the arrow on the View button to deselect and add back columns.

The list consists of one row for each answer or category, and each row consists of the following columns:

- **Language fields** – The first columns in the list contain the text of the answer. There is one column for each active language (See section 7.2.3.9 Languages). This makes it easy to translate between several languages.
- **Precode** – Defines the precode of the answer. If a precode is not supplied, the precode will be equal to the position in the list, starting from 1. If you change the answer list while a survey is running, make sure that the precodes follow the original answers. Precodes can only contain alphanumeric characters, and underscore (_), with no white space. The maximum length is 32 characters. Illegal characters will cause the database compilation to abort. For single questions and the items of a grid it is the precode which is stored in the database. It is stored as a string value. For multi questions the precode is used together with the question id as variable name. For example a multi question q1 with three answer alternatives with precodes 1, 2 and 3 will give three variables q1_1, q1_2 and q1_3 in the database. The same goes for the elements of a grid.
- **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, so 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 you for example have “Do not know” as a possible answer, but want the averages to be calculated only from the other answers, you may 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 when you define values in an ongoing survey or a closed survey.
- **RDG %** – When you are using the Random Data Generator (see section 13.1 Random Data Generator for more details) to test your survey, and you have a screening question in the survey, you can use this column to specify a percentage of respondents you want to be screened, in order to avoid that system inserts too many or too few respondent in this group when generating test data. The RDG % numbers have to be integers from 0 to 100. It is not required to specify numbers for all items in the answer list. Items without a setting will get a value according to the remaining percentage, evenly distributed.
- **Exclusive** – [Applies to Multi questions only] 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 will not be allowed to choose elements defined as multi-punch and elements defined as single-punch simultaneously. If the default validation is used, the respondents have to pick either one or more multi-punch elements or one single-punch element.
- **Background color property** – This property makes it possible to have color variations inside a grid, and answer lists in Single and Multi questions.

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 Dropdown property is chosen.
- **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*” always last in a list).
- **Other** – Set this property to “yes” if you want an open-ended text box after the answer alternative.

It is not possible to combine dropdown option (see section 7.2.3.10 Question Properties) and Other in Single questions. The Other option overrides the Dropdown option.

If you have checked off this option for several elements of a Grid question, these elements will automatically be marked as Not required (see section 7.2.3.10 Question Properties), i.e. it will be sufficient to answer the other elements in the Grid.

When the question is newly created, the list of answers will be empty. Press the *Add*-button to create a new answer in the list. Click inside the first column in the list. This will activate the first column. When you start typing, the active column will be put in editing mode, and a cursor will appear. If there already is text in the column, your new text will be appended to the end.

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 buttons. If you are at the bottom of the list, the down-button will 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 answerlist, 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: copy the list in the scratchpad, go to the *Answers* in your question, click *Add*, single-click in the cell to activate it, and then paste the list.

The button *Add predefined* allows you to add a predefined list or scale to the answer list (see section 7.2.3.11 Lists). This is a very powerful functionality when, for example, reusing brand lists or scales in the survey. In a predefined row, the first column will become a dropdown-list when activated; giving you the opportunity to choose between the different predefined scales and lists.

Buttons *Add Group Heading* and *Add Group End* are used to insert subheaders 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 subheader, you do the following: first you add a subheader line by clicking the Add Group Header button > enter the subheader > enter the first 3 answer alternatives > then Add Group End > and then again add a new subheader line by clicking the Add Group Header button. The result will look approximately like the picture below:

☐ English	Norwegian	Precode	RdgMulti%	BgColor	Exclusive	KeepPos	Other
☐ French Cars	Franske Biler						
☐ Renault	Renault				☐	☐	☐
☐ Citroën	Citroën				☐	☐	☐
☐ Peugeot	Peugeot				☐	☐	☐
☐ Italian Cars	Italienske Biler						
☐ Alfa Romeo	Alfa Romeo				☐	☐	☐
☐ Fiat	Fiat				☐	☐	☐
☐ Ferrari	Ferrari				☐	☐	☐

Figure 177: Add Group Heading

You will also be able to randomize, rotate, flip, and sort alphabetically the items in each group. See section 7.2.3.10 Question Properties.

The scratchpad is explained in section 7.6 Scratchpad.

7.2.3.4 Scale

[Only available for grids]

This page defines the *scale* dimension of a grid. The page is functionally equal to the *Answers* page and can include the following additional column:

- **Bar Height** – Allows you to specify the height in pixels of a bar to be placed above the scale column. For example, in a “Please indicate on a scale of 1 to 10, the importance....” Question, you can add a small bar to the “1” column, a bit larger bar to the “2” column, a bit larger bar to the “3” column etc. to give a ramp effect. This column is only visible if the Show Scale Bars property is selected in the Properties page for the question (see section 7.2.3.10.1). You can set the color of the border and fill for the bars in the Question Form Input Properties form, see section 4.10.3.5.6.

7.2.3.5 Validation

For unlimited flexibility in question-validation, you can use JScript-code to validate your answers. See chapter 12 Confirmit Scripts.

7.2.3.6 Masking

Depending on the object type, this tab can include one or more of the following masking fields: precode mask, question mask, column mask, and scale mask. If you want to dynamically exclude one or more of the answers, scale items, 3D Grid columns, entire questions, use this field to create a JScript-expression. See chapter 12 Confirmit Scripts for a description of expressions.

7.2.3.7 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.

7.2.3.8 Results

This page displays the Rapid Results report for the current question. See chapter 18 for more information. Note the global database switch in Confirmit!

7.2.3.9 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.

7.2.3.10 Question Properties

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

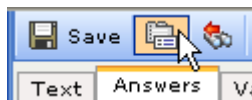


Figure 178: The Show/Hide Properties button

The properties pane opens in a new frame. See section 3.6 Frames and Panes.

The properties available for a question depend on the question type. All possible are listed below.

7.2.3.10.1 The General Tab

- **List Rows/Columns** – [Single, Multi, Grids] Divides the answer list into several columns and/or rows. If you specify number of rows only, the answers will be distributed evenly across the columns and vice versa.

These options have no effect on Single dropdown 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 Dropdown as an option, List Rows/Columns may be used to specify the number of rows and columns for the dropdowns.

- **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 responses in the database, you will receive a warning that 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 properties Columns and Numeric 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 $0 < p \leq 28$. 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 $0 \leq s \leq p$. 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 dropdown "Lower limit type" containing the choices ">" and ">=". For "Upper limit", there is a dropdown "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! See chapter 17 Online Coding Tool.
- **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 (see section 7.2.3.3 Answers) 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 9.) 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. See chapter 15 Handling Respondents in Limited Surveys.
 - **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 (see chapter 21 Recoding Data.)
 - **Panel variable** – Treat this form as a Panel variable. Panel variables are by default hidden. For more information, see chapter 16 Basic Panels.
- **Dropdown** – [Single, Grid] Singles and grids are normally represented as rows and columns of radio buttons. This flag will generate dropdown-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 dropdown title instead of the default "Please select an answer".
- **Not required** – [All] Normally, all questions require an answer if you have checked off the option Answer Required in Survey Settings (see chapter 14 Preparing for Data Collection).

Checking this flag will 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.

- **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.

See chapter 17 Online Coding Tool.

- **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 preselected answers set by a script (see 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 preselected/preset answers.
- **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 (see also section 7.2.3.4). 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 (see chapter 10 Translator). This property gives you the possibility to hide nodes that are used for internal programming purposes from the translators in Confirmit Translator.
- **Deleted** – [All] When you delete an object from the routing, it is not permanently deleted, but the “deleted”-flag is set. If you turn on *Show deleted nodes* (see section 7.5 Editing the Routing), you can undelete the object by unchecking this flag.

7.2.3.10.2 The Advanced WI Features Tab

- **Button images** – [Single, Multi, Grid] (May also be defined from the Generate WI page globally) Allows you to decide on the layout of radio buttons and check boxes. Three options are possible:
 - **Global images (if specified)** – a default value, i.e. the image URLs that are specified on the Generate WI page will be used.
 - **No images** – Overrides the setting from the Generate WI page , regular radio buttons and check boxes will be used.
 - **Custom images** – Overrides the setting from the Generate WI page, and allows you to specify image URLs for a specific question only.
- **Image URLs** – Available only when Custom images are selected. In these textboxes you enter the URLs of the button images.
 - **Default** – when an answer alternative is not selected
 - **MouseOver** – when the respondent points the mouse at the button image
 - **Selected** – the button image once the respondent has selected an answer alternative
 - **Width, Height** – define the width and height of the images.
- **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 respondent types text in the other-specify field
 - Automatically switches off the radio button/checkbox when 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, hence displaying the text again when the radio button/checkbox is re-activated
- **Drag-n-Drop ranking** – [Multi Ordered] This feature will enable drag-and-drop functionality for the rank order questions.

- **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 losing 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, Grid] This feature allows respondents to click and drag the slide bar and drop it on the answer alternative of choice.
 Note that the Slider feature will only be seen by respondents with Internet Explorer 5.0 and newer. When using other browsers, the respondent will see the standard Confirmit survey interface, with "normal" radio buttons. Not displaying the standard Confirmit Survey interface while the advanced features are being loaded requires Internet Explorer 5.5 and newer.
- **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.

7.2.3.10.3 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.

7.2.3.11 Lists

Quite often, one or more scales, or one or more brand-lists, product-lists, etc. are reused several times in a questionnaire. Confirmit allows you to predefine such lists, and reuse them in forms (see section 7.2.3.3 Answers), 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.

Field	Description
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. See section 7.2.3.3 Answers for description of usage.
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 textboxes, 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.

Table 11: List Properties

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 is executed (when the *ELSE* node exists). Figure 73 shows a conditional object in the questionnaire tree.

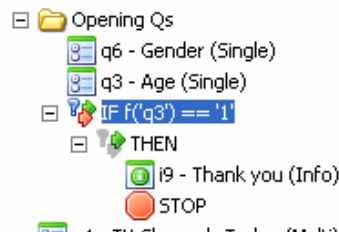


Figure 179: Conditional node

The expressions in the IF condition are written using JScript. Expressions are described in chapter 12 Confirmit Scripts. To help to build expressions Confirmit has included a *condition builder* tool (see section 7.2.4.2 Condition Builder).

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*. Described in detail in chapter 12 Confirmit Scripts.

- **Branches** – select whether the condition should include an *ELSE* branch or not.
- **Deleted** – used the same way as in forms. When you delete a condition from the questionnaire tree, it is not permanently deleted, but the “deleted” flag is set. If you turn on *Show deleted nodes* (see section 7.5 Editing the Routing), 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.

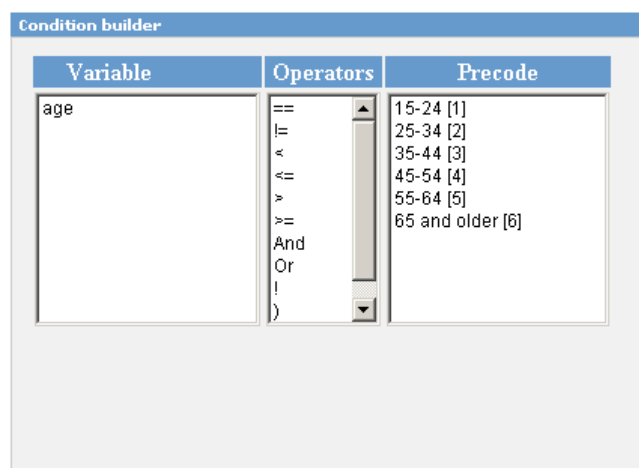


Figure 180: Condition builder

To use the condition builder, activate a condition-object by double clicking on its IF branch, or by right-clicking it and selecting *Edit* from the menu. **Single**-click on a form in the routing-tree you want to base your expression on (Double-clicking will activate form-edit mode). This will bring up the condition builder for the chosen form. The condition builder consists of three lists:

List	Description
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.

Table 12: Condition builder

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.

Description	Symbol
Logical NOT	!
Less than	<
Greater than	>
Less than or equal to	<=
Greater than or equal to	>=
Equality	==
Inequality	!=
Logical AND	&&
Logical OR	

Table 13: Single/grid operators

Description	Method/operator
Includes	.inc(
Union	.union(
Intersection	.isect(
Difference	.diff(
Logical AND	&&

Logical OR	
Logical NOT	!
End parenthesis	)
Comma	,

Table 14: Multi operators/methods

To build effective conditions you need to be aware of operator precedence. When Conformat evaluates conditions the operations are performed in a controlled order. Operations with a higher precedence are performed before those with a lower one. Table 21 shows this order from highest to lowest.

Precedence	Operator
7	()
6	!
5	<, <=, >, >=
4	==, !=
3	&&
2	
1	=

Table 15: Operator precedence

To change the order of evaluation of operations you use parentheses. 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.

Example: You have an age question with 5 answer alternatives and you want to include a condition that selects only respondents who have answered '1' or '2'.

This is the correct condition:

IF f('q3') == '1' || f('q3') == '2' THEN...

Figure 181: Correct Condition

Incorrect Condition

This is not *correct* syntax:

IF f('q3') == '1' || '2' THEN...

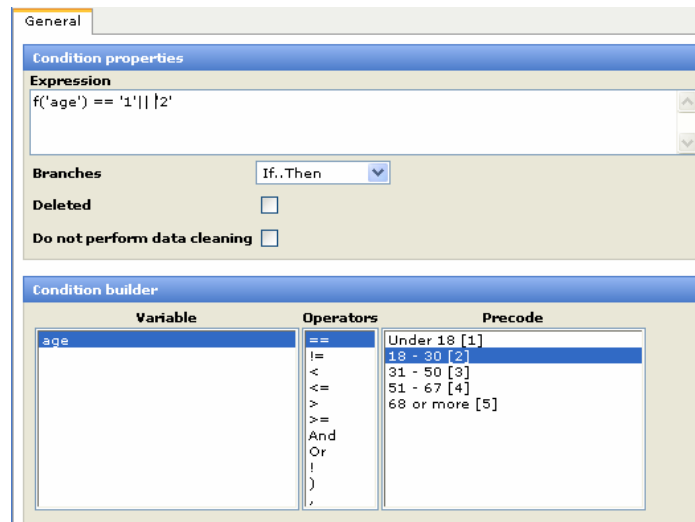


Figure 182: Incorrect Condition

Note: You see from the expressions above that the precodes 1 and 2 have apostrophes in front and after. This is because the "precodes", i.e. the answers to questions, are always stored as strings in the database. Therefore you have to be careful when using greater than (>) or less than (<) in expressions.

Consider how you sort items alphabetically (like in a dictionary). When treated as strings a sequence of numbers 1,2,3,...,10,11 will be sorted like this: 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.

See chapter 12 Confirmit Scripts for a more thorough description of Jscript syntax in conditions.

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.

Directive	Description
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.

Table 16: Directives

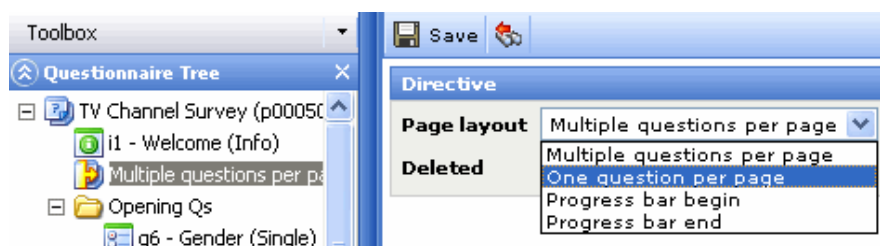


Figure 183: Selecting a Directive

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.

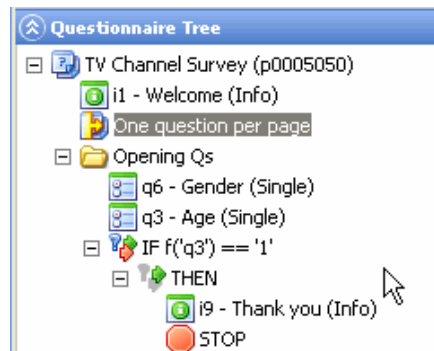


Figure 184: Single Question Directive

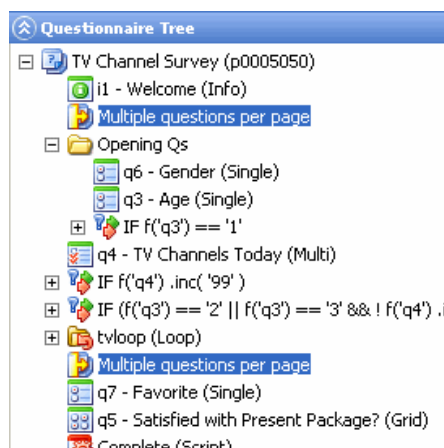


Figure 185: Multiple Questions Directive

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 that:

- Progress bar directives are not allowed to nest. 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 with 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 in the questionnaire will end the interview. This is mainly used for screening-purposes, and to end the interview various places in the routing. The status-code you set on the Stop-object is important:

Setting	Description
Complete	The web interview should be considered a complete interview. 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 because of screening. 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. See chapter 8 Quotas.

Table 17: Stop node settings

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 .NET interview engine, see chapter 14 Preparing for Data Collection.

The screenshot shows the 'Stop node' configuration window. At the top is a 'Save' button. Below it, the 'Stop node' section has a dropdown menu for 'Interview status after stop node' currently set to 'Complete', and a 'Deleted' checkbox. The 'English' language section has a 'Title' field containing 'Thank you!' and a 'Text' area containing 'Dear respondent...'. The 'Norwegian' language section has a 'Title' field containing 'Takk!' and a 'Text' area containing 'Kjære respondent...|'.

Figure 186: Edit text in STOP node

The title and the status set on the stop node will be displayed in the questionnaire tree, similar to how question IDs and titles are displayed.

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. (See chapter 12 Confirmit Scripts.)

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. Let's say you want to repeat a block of questions for a list of car-brands. Instead of defining the same block of questions for each car-brand, only replacing the brand name, you can simply create a loop iterating over the list of cars, asking the same question(s) for each brand. You can also use nested loops (loops in loops).

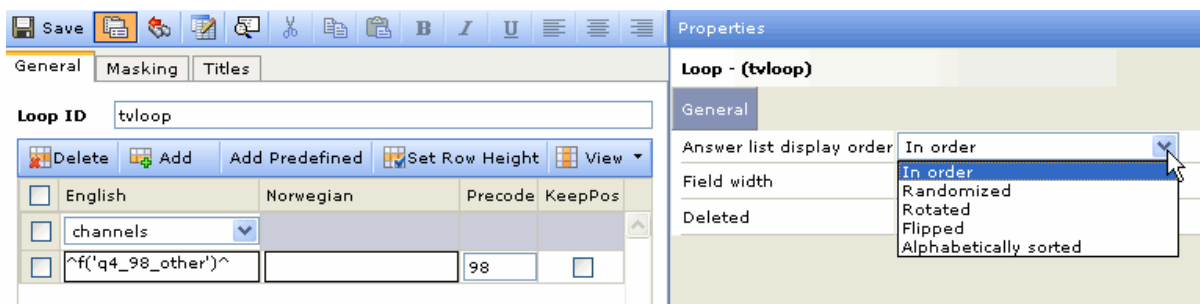


Figure 187: Loops

The initial definition of a loop consists of giving the loop a unique ID within the project, and creating a list of loop-iterations (created in the same way as you create an answer list in a form (see section 7.2.3.3 Answers). The different parts of the loop-details view are:

Loop ID: A unique ID of the loop within the project. The maximum length is 50 characters and it should contain only alphanumeric characters.

Field width: Number of characters assigned to the iteration precode in the database and when exporting to fixed width ASCII files.

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. See section 12.4 Precode and Scale Masks /Filtering Answer Lists/Scales for a description of expressions.

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, 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).

The answer alternatives that have KeepPos property set to Yes, will keep their original position in the list.

Deleted: When you delete a loop from the routing, it is not permanently deleted, but the “deleted”-flag is set. If you turn on *Show deleted nodes* (see section 7.5 Editing the Routing), you can undelete the object by unchecking this flag.

Column	Description
Language columns	The first columns in the list contain the text of the loop-iteration. There is one column for each active language (see section 7.2.3.9 Languages).
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 maximum length is 32 characters. Illegal characters will cause the database compilation to abort.
KeepPos	Set this property to “yes” if you want an item to keep its position when randomizing or rotating the list of iterations.

Table 18: Standard loop columns

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. All questions share the same answer list in a 3D Grid.

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 Dropdown 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:

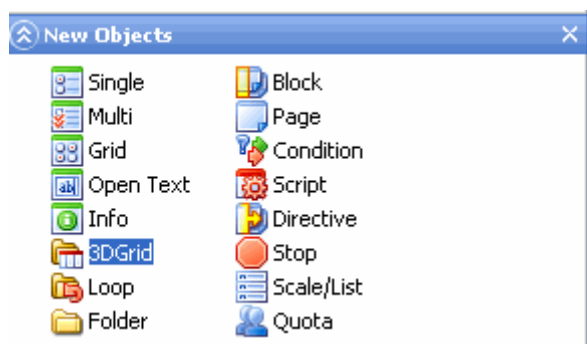


Figure 188: 3D grid object in the New objects folder

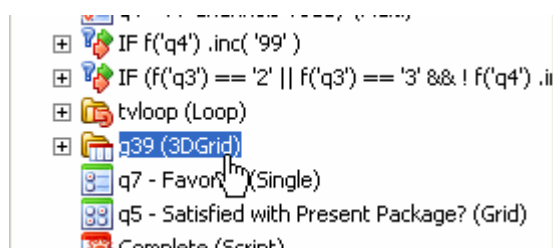


Figure 189: 3D grid in the questionnaire

Property	Description
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. See APPENDIX C: RESERVED KEYWORDS to avoid using reserved keywords as question ids.
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 include. See chapter 12 Confirmit Scripts for a description of expressions.
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, 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). 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 (See section 14.2 Generating Interview Files).
Deleted	When you delete an object from the routing, it is not permanently deleted, but the “deleted” flag is set. If you turn on <i>Show deleted nodes</i> (See section 7.5 Editing the Routing), 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.

Table 19: 3D Grid Properties

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 *Answers* you enter the answer list that will be shared by all the questions that will be added to the 3D grid. In *Text* you may 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 questions, and are explained in detail in section 7.2.1 The Forms.

Now you can drag questions from the *New Objects* toolbox and drop them into the 3D grid. The stapled line will indicate 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 become highlighted. You can also right-click on the 3D Grid and choose from the *Insert (Inside)* menu.

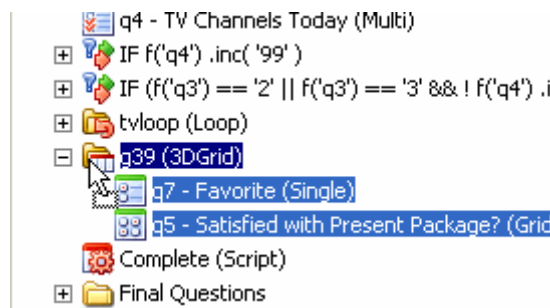


Figure 190: Dropping Items Into a Folder

You 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* option for Single punch, Multi punch 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* (see Figure 191: A 3D grid object in a survey), must be entered in the Text field of these questions.**

The following picture shows how a 3D grid consisting of a Multi punch question, a Single punch question, and a Grid question with a dropdown property chosen, will look like in an interview.

Cars2			
Please, answer the following questions about cars:			
	Which cars have you testdriven?	Which car do you own?	Evaluate the cars:
Volvo	☐	☐	Please select your answer ▼
Saab	☐	☐	Please select your answer ▼
BMW	☐	☐	Please select your answer ▼
Audi	☐	☐	Please select your answer ▼
Ferrari	☐	☐	Please select your answer ▼
Fiat	☐	☐	Please select your answer ▼

Powered by confirmit

Figure 191: A 3D grid object in a survey

7.2.10 Block

The block element enables randomization and/or rotation of questions. This is a standard survey functionality, used frequently in market research. It is used to avoid bias in responses that can come as a result of the order in which the questions have been presented. In addition to normal questions blocks can contain complex structures like conditions and loops, and it is also possible to nest blocks. The blocks will have single page breaks.

To insert a block in your questionnaire, drag a Block object from the New Objects toolbox and drop it into the questionnaire tree. Into the Block folder, insert the questions you want to rotate or to randomize. To edit the block item, double-click it or right-click it and choose Edit from the menu.

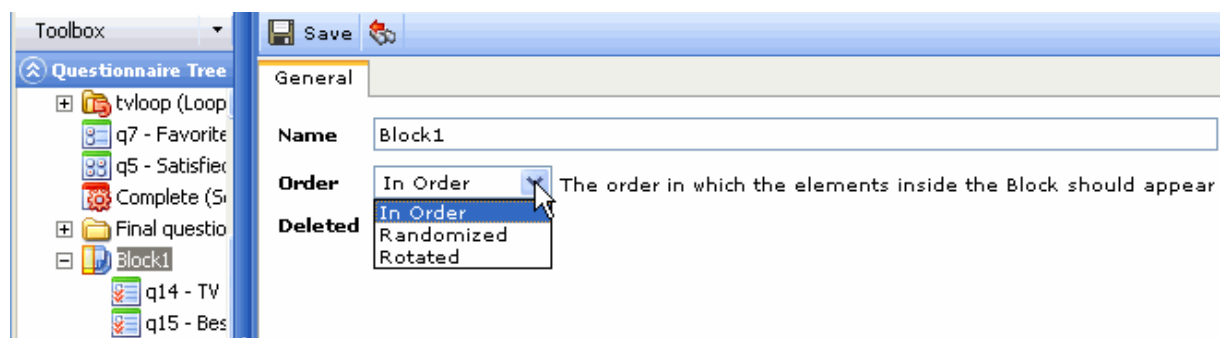


Figure 192: Block object

You can rename the block object and choose the order in which the elements in the block should appear: In Order, Randomized, or Rotated.

You can also have a block containing several other blocks, like in the screenshot below: the Entertainment Block contains three other blocks with questions in them.

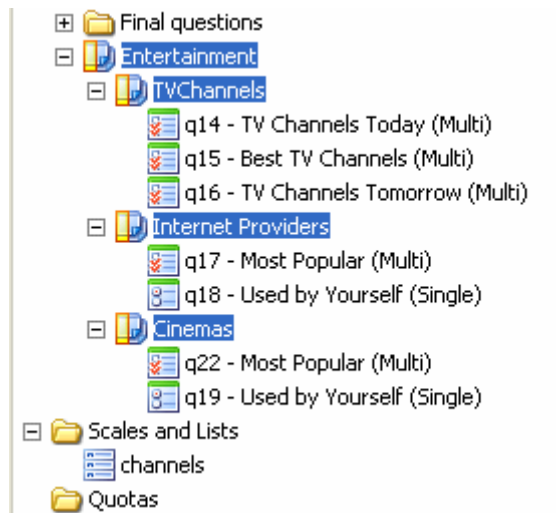


Figure 193: Blocks in blocks

7.2.11 Page

The Page object enables randomization and rotation of simple elements (questions) within a page. Objects that will cause page break, for example, conditions, loops, blocks etc., are not allowed within a Page.

Pages can be used inside Blocks.

Pages can also be used in combination with Question masking (see chapter 12 Confirmit Scripts) if there are some questions that should be displayed only under certain conditions.

To insert a page in your questionnaire, drag a Page object from the New Objects toolbox and drop it into the questionnaire tree. Into the Page folder, insert 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.

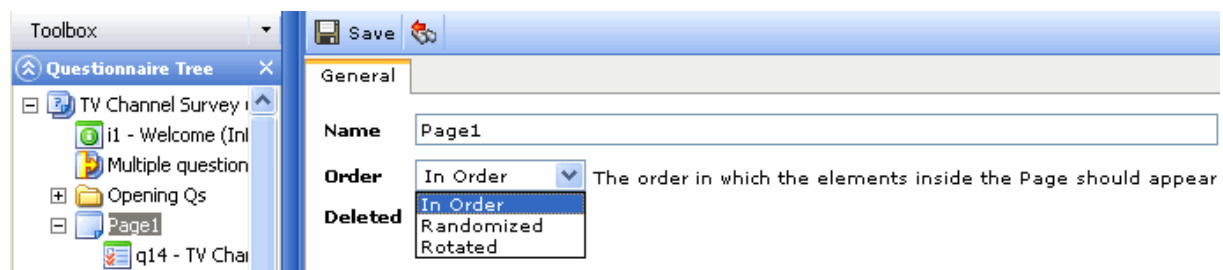


Figure 194: Page object

You can rename the page object and choose the order in which the elements in the block should appear: In Order, Randomized, or Rotated.

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**. See section 15.4 Sending E-mail, 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 (see chapter 10 Translator). 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.

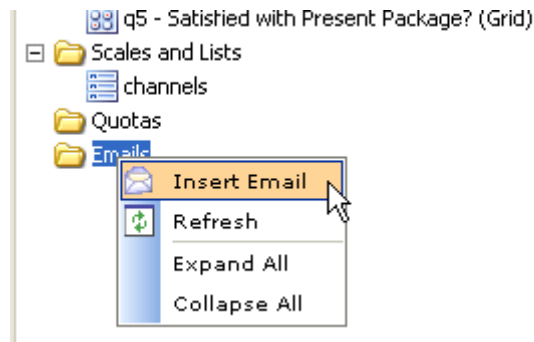


Figure 195: Insert Email Object

To edit an email object you can either double-click on it or right-click on it and choose **Edit** from the menu.

Text

Text-Mode Wysiwyg Html

Id e1

Deleted ☐

Read only ☐

Include link ☐

Use HTTPS ☐

Send as Html ☒

Send as plain text ☒

Override recipient email ☐

Send email FW ☐

Send confirmation email ☐

From

Display Name

Reply to

Default language

English

Encoding: Western European (ISO)

Activate language ☒

Subject

Html body

Dear respondent,

Please take 10 minutes to answer this short satisfaction survey.

^slink^

Plain text body

Dear respondent,

Please take 10 minutes to answer this short satisfaction survey.

^slink^

Figure 196: Editing Email Objects

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 Conformat Professional designer, you can switch between two editing modes when editing email objects: the WYSIWYG mode and the HTML (Plain text) 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. In the picture above you see that the text in the HTML body field is displayed in bold font.

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

- **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 link option.

- **Send as HTML** – check to send the email as HTML code. Only mail clients that support HTML will be able to read the email.
- **Send as plain text** – check to send the email as plain text. Most mail clients will be able to read it.
The email object will have two text fields for each language: one for HTML body and one for Plain text body. When sending 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 dropdown. 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 dropdown 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. See also section 7.2.12.1 Fixed Sender Domain and Email Delivery Report Functionality.

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 (see chapter 15 Handling Respondents in Limited Surveys for more information on limited surveys and respondent lists). 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

Starting with Confirmit 11, 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 (see section 15.4.6 Email Delivery Report for further 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.

Note: On-Premise clients must license Premium Emailing to access this functionality. On-Premise clients should contact their Account Manager for further information.

Note: This functionality will not work in Lotus Notes; only the email address will be displayed.

Read more about the Email Delivery Report functionality in section 15.4.6 Email Delivery Report.

7.3 Using Survey Layouts

Note that you can create a more customized look and feel for your surveys with Survey Layouts. See section 4.10 Survey Layouts 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.

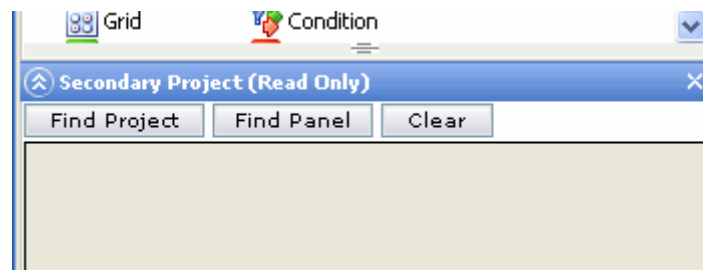


Figure 197: Secondary project toolbox

To find a project or a panel you want open in this toolbox click respectively Find Project or Find Panel buttons. 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:

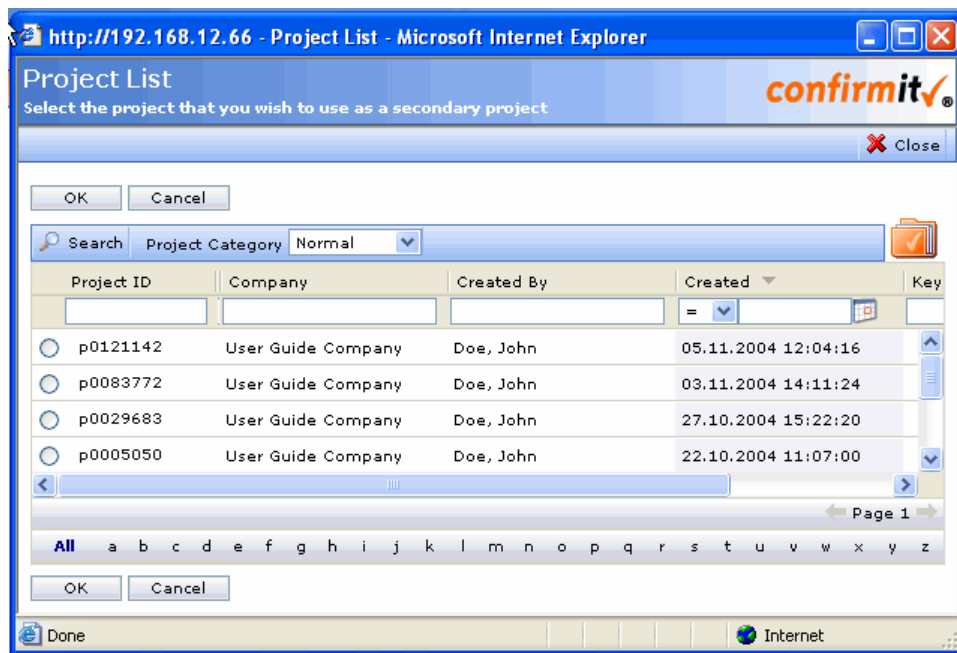


Figure 198: Project list pop-up

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.

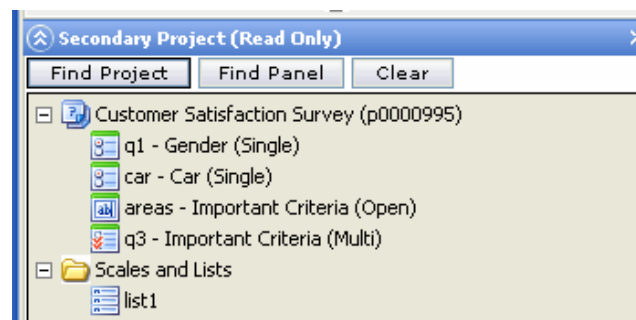


Figure 199: Secondary project questionnaire tree

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 means of drag & drop in the routing-tree. You can expand the questionnaire tree by right clicking the top-most 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), left click the *text* of a routing object in the tree. This will make the object turn **blue**.

- 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, giving you an indication that you are dragging an object.
- A stapled like will indicate the destination of the object you are dragging. To drop objects into folders, Loops, 3D Grids, point to the folder icon with the mouse pointer.

- 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.
- When you drop the object, it will be moved to the new location, as long it is dropped on an allowed destination. An example of an un-allowed 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 in section 7.2.3.10 **Question Properties**.

7.5.2 Duplicating an Object

Duplicating behaves exactly like moving, but you create a copy of the source object. To duplicate, hold the <CTRL>-key down before dropping. An alternative is to right-click an object, and choose *Duplicate* from the menu.

7.5.3 Selecting Multiple Objects

If you want to move or duplicate multiple objects, select the first object, hold <SHIFT> or <CTRL>, and press 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>-button while dragging, and use the <CTRL> button to duplicate objects when dropping, as described in section 7.5.1 Moving an Object. 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 <DEL>, or right-click on the object and select **Delete** from the menu. This will remove the selected objects from the routing, and set the *Deleted* flag on the objects to true.

You can undelete such objects by right-clicking 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 either right-click on the soft deleted items and choose *Undelete* from the menu, or you can access the *Properties* page for the deleted object you want to recover (see section 7.2.3.10 Question Properties), and uncheck the *Deleted* flag.

However, if the objects are already marked as deleted, and you delete them, they are **permanently** deleted, and non-recoverable.

7.5.5 Pitfalls

Due to internet-browser limitations, some of the drag & drop operations may not be as intuitive as they are in 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 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 textboxes, 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.

Field	Description
Name	The name of the folder (is displayed in the routing-tree).
Description	A description of the folder.

Table 20: Folder fields

Folders make it easy to move a set of related routing-objects around in the questionnaire. When you move a folder, all the objects inside the folder will be moved, too.

7.8 Grid View

The Grid View functionality allows you to edit several questionnaire objects simultaneously in one page in all project languages. The Grid View is a page where selected properties of selected questionnaire objects 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 Grid View.

7.8.1 The Grid View Configuration Page

To enter the Grid View configuration page, highlight an object in the questionnaire or a Scale/List. 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

You can right-click an object in the questionnaire, and select Grid View from the menu.

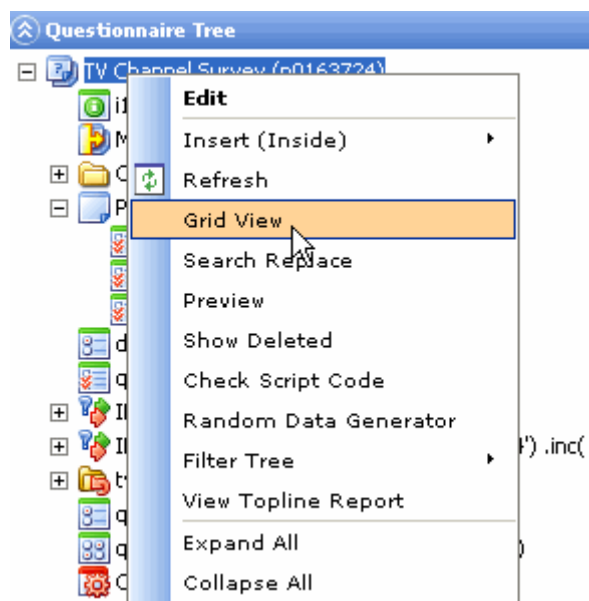


Figure 200: Choosing Grid View from Item Menu

The Grid View configuration page will be displayed.

Information

Config settings

Text (Title, text, instruction...) ☒

Answers (Answer, Scale, Loop Member...) ☒

Properties (Dropdown, deleted, randomize ...) ☒

Children (...of Loop, folder, condition ...) include

Languages (text and answers)

English ☒

Norwegian ☒

Textfilter: (Only nodes containing the following text)

☒ Not activated

☐

Figure 201: Grid View Configuration Page

Setting	Description
Text	Checking this flag enables question text fields (title, text, instruction) in Grid View
Answers	Checking this flag enables answers (answers, scales, loop members) in Grid View
Properties	Checking this flag enables 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	Clicking this button will activate the Grid View according to your chosen settings.

Table 21: Grid View Configuration Settings

7.8.2 The Grid View Page

7.8.2.1 The Grid View of a Single Node

If you choose a Single question, checks all the settings, and clicks Search, the following picture will be displayed.

q6 (SINGLE) Find in tree

TEXT

Title	Text	Instruction
en Gender	Specify:	
no Kjønn	Spesifiser:	

ANSWER

English	Norwegian	Precode	Weight	ColWidth	BgColor	Pun
Male	Mann					
Female	Kvinne					

◀ ▶

Add Add predefined Clear Delete rows

PROPERTIES

Precode mask Validation code

Randomize ☐ Deleted ☐ Field width ☐

Background var ☐ Not required ☐ List rows ☐

Hidden ☐ Dropdown ☐ List cols ☐

Panel var ☐

Figure 202: Grid View for a Single Question

As Figure 202 shows, all fields in the question with the question ID “q6” are editable.

Setting	Description
Hide tree	Clicking this button will hide the questionnaire tree, and the Grid View will be expanded.
Save	Click this button to save the changes made in the Grid View.
Find in tree	Clicking this button will 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. Clicking this button will display the questionnaire tree again.

Table 22: Grid View Settings



Figure 203: Show Tree Button

In the following, a few screenshots of various nodes in Grid View will be presented.

The picture below is a Grid View of an Information node with all properties and project languages chosen in the Grid View configuration settings:

i8 (INFO) Find in tree

TEXT			
	Title	Text	Instruction
en	Welcome	Welcome to this survey!	
no	Velkommen	Velkommen til denne undersøkelsen!	

PROPERTIES

Deleted ☐

Hide tree Save

Figure 204: Information Node Grid View

The picture below is a Grid View of an Open Text question with all properties and project languages chosen in the Grid View configuration settings:

q13 (OPEN) Find in tree

TEXT			
	Title	Text	Instruction
en	How many cars		
no			

PROPERTIES

Validation code

Password ☐ Hidden ☐
 Background var ☐ Not required ☐ Rows 1
 Numeric ☒ Deleted ☐ Columns
 Panel var ☐
 Precision Lower limit >=
 Scale Upper limit <=

Hide tree Save

Figure 205: Open Text Grid View

The picture below is a Grid View of a Grid question with all properties and project languages English and Norwegian chosen in the Grid View configuration settings:

q11 (GRID) Find in tree

TEXT

Title	Text	Instruction
en Rank	Evaluate the cars:	
no Ranging	Evaluer bilene:	

ANSWER

English	Norwegian	Precode	Weight	ColWidth	BgColor	Punch	k
Speed	Speed						
Safety	Safety						
Sunroof	Sunroof						
Color	Color						

Add Add predefined Clear Delete rows

SCALE

English	Norwegian	Precode	Weight	ColWidth	BgColor	Punch
Poor 1	Ikke tilfredsstillende 1			60		
2	2			60		
3	3			60		
4	4			60		

Add Add predefined Clear Delete rows

PROPERTIES

Precode mask Validation code

Scale mask

Randomized ☐ Ordered ☐ Field width

Dropdown ☐ Deleted ☐

Not required ☐

Hide tree Save

Figure 206: Grid Question Grid View

The picture below is a Grid View of a Scales/Lists folder with all properties and project languages English and Norwegian chosen in the Grid View configuration settings:

cars (SCALESLISTS)

SCALES AND LISTS

English	Norwegian	Precode	Weight	ColWidth	BgColor	Punch
Volvo	Volvo					
Saab	Saab					
BMW	BMW					
Audi	Audi					

Add
Add predefined
Clear
Delete rows

scale (SCALESLISTS)

SCALES AND LISTS

English	Norwegian	Precode	Weight	ColWidth	BgColor	Punch
1 Poor	1 Ikke tilfredsstillende		1			
2	2		2			
3	3		3			
4	4		4			

Add
Add predefined
Clear
Delete rows

department (SCALESLISTS)

SCALES AND LISTS

English	Norwegian	Precode	Weight	ColWidth	BgColor	Punch
Sales						
Marketing						
Accounting						
Administration						

Add
Add predefined
Clear
Delete rows

Hide tree
Save

Figure 207: 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.

The picture below is a Grid View of a Condition with all properties and project languages chosen in the Grid View configuration settings:

(CONDITIONLOGIC) Find in tree

PROPERTIES
Statement
qf('quota1')

Deleted ☐ Branches If..Then

i18 (INFO) Find in tree

TEXT

	Title	Text	Instruction
en	Thank you!		
no	Takk!		

PROPERTIES
Deleted ☐

(STOPLOGIC) Find in tree

PROPERTIES
Deleted ☐ Interview status after stop node Complete

Hide tree Save

Figure 208: Condition Grid View 1

The picture below is a Grid View of a Condition with Children set to *not include* in the Grid View configuration settings:

(CONDITIONLOGIC) Find in tree

PROPERTIES
Statement
qf('quota1')

Deleted ☐ Branches If..Then

Hide tree Save

Figure 209: Condition Grid View 2

The picture below is a Grid View of a Folder with Children set to *not include* in the Grid View configuration settings:

Figure 210: 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 the following warning message:

English	Norwegian	Precode	Weight	ColWidth	BgColor	Pu
Volvo	Volvo					
Saab	Saab					
BMW	BMW					
Audi	Audi					

Figure 211: The Max Number of Nodes Exceeded Message

The number of how many nodes are shown will be specified in the field where it says (20) in Figure 211.

If the project has reusable Scales/Lists, these will be displayed first. In this case, we would advise you 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.

Information

Config settings

Text (Title, text, instruction...) ☒

Answers (Answer, Scale, Loop Member...) ☒

Properties (Dropdown, deleted,randomize ...) ☒

Children (...of Loop, folder, condition ...) include

Languages (text and answers)

English ☒

Norwegian ☒

Textfilter: (Only nodes containing the following text)

☐ Not activated
☒

Figure 212: 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, right-click an object in the questionnaire or a Scale/List, and select Search/Replace. 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

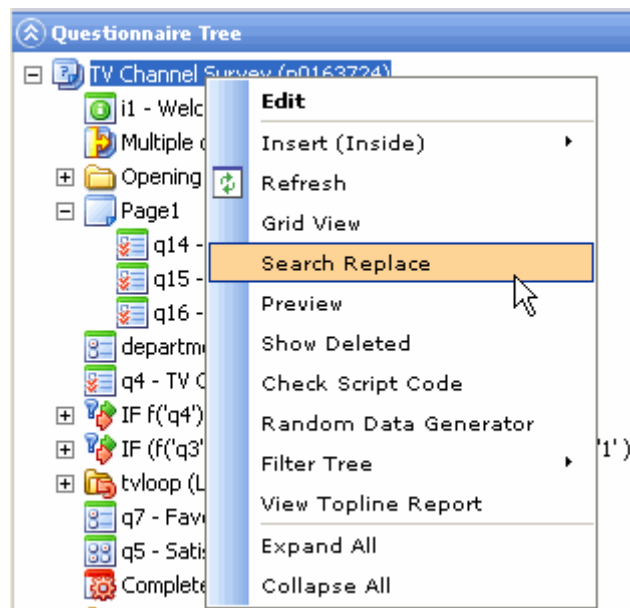


Figure 213: Choosing Search/Replace from Item Menu

The Grid View configuration page will be displayed.

Information

Config settings

Text	(Title, text, instruction...)	☒	
Answers	(Answer, Scale, Loop Member...)	☒	
Properties	(Dropdown, deleted, randomize ...)	☒	
Children	(...of Loop, folder, condition ...)		include ▼
Languages	(text and answers)		
	English	☒	
	Norwegian	☒	
Search text:			

Figure 214: Search/Replace Configuration Settings

Setting	Description
Text	Checking this flag enables question text fields (title, text, instruction) in Search/Replace Grid View
Answers	Checking this flag enables answers (answers, scales, loop members) in Search/Replace Grid View
Properties	Checking this flag enables form properties in Search/Replace Grid View
Children	Choose whether to include or not to include the children of nodes (loop, folder, condition) in Search/Replace Grid View
Languages	Choose in which project languages you want to work in Search/Replace Grid View
Search text	Enable nodes containing a specific text string in Search/Replace Grid View.
Search	Clicking this button will activate the Search/Replace Grid View according to your

	chosen settings.

Table 23: Grid View Configuration Settings for Search/Replace

7.9.2 Search/Replace Grid View Page

If the user chooses to search for a specific text in the entire Routing, he/she highlights the Routing folder, chooses Search/Replace from the Item menu, chooses the settings and languages in which he/she wants to make changes, enters the Search text in the text field, and clicks 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, the user wants to make a search on nodes containing the word “car”:

Information

Config settings

Text	(Title, text, instruction...)	☒
Answers	(Answer, Scale, Loop Member...)	☒
Properties	(Dropdown, deleted,randomize ...)	☒
Children	(...of Loop, folder, condition ...)	include v
Languages	(text and answers)	
	English	☒
	Norwegian	☒
Search text:	car	

Search

Figure 215: Defining Search in Configuration Settings

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

Figure 216: Search/Replace Grid View

Figure 216 shows that 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 Figure 215 shows that all settings and all project languages were chosen in Grid View configuration settings. The Search/Replace returns only the fields containing the search word.

Setting	Description
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 highlighting 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.

Table 24: Search/Replace Settings

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 checking 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 alphabetic 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. In order to make the spelling functionality faster we have chosen to carry out all spell checking of a set of fields on the server and return everything 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 errors, right-click the question in the questionnaire tree and choose Spell Check from the menu.

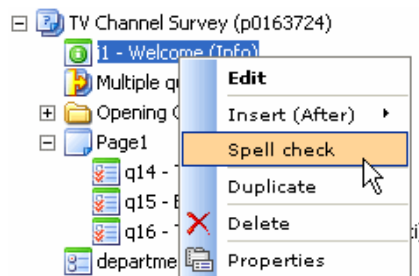


Figure 217: Choosing Spell Check

The following screen is displayed:

Spell checker

Check spelling for the current language; English p0000277

q4 - Teest Driven Carrs

Title
Teest Driven Carrs

Text
Which cars have you teest driven?

Instruction

Answers:

Volvo	BMW
Ferrari	Saab
Audi	Fiat

☐ English ☐ Norwegian

Check Spelling Save Settings

Figure 218: Administration Window for Spell Check

All text fields of the question are displayed. Figure 218 features 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 (Note: section 7.10.1 Supported languages), click the radio button for the next language to display the text for that language in the Administration window.

Spell checker

Check spelling for the current language; Norwegian p0000277

q4 - Bileer

Title
Bileer

Text
Hvilke biler har du prøvekjørt?

Instruction

Answers:

Volvo	BMW
Ferrari	Saab
Audi	Fiat

☐ English ☒ Norwegian

Check Spelling Save Settings

Figure 219: 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

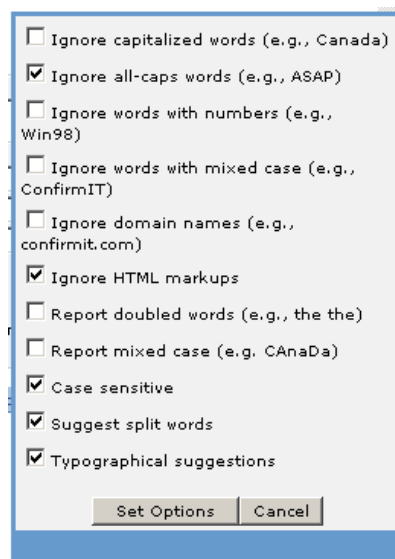


Figure 220: Settings Window

In the Settings window, choose the criteria you want the Spell Checker to use when searching for misspellings. 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.

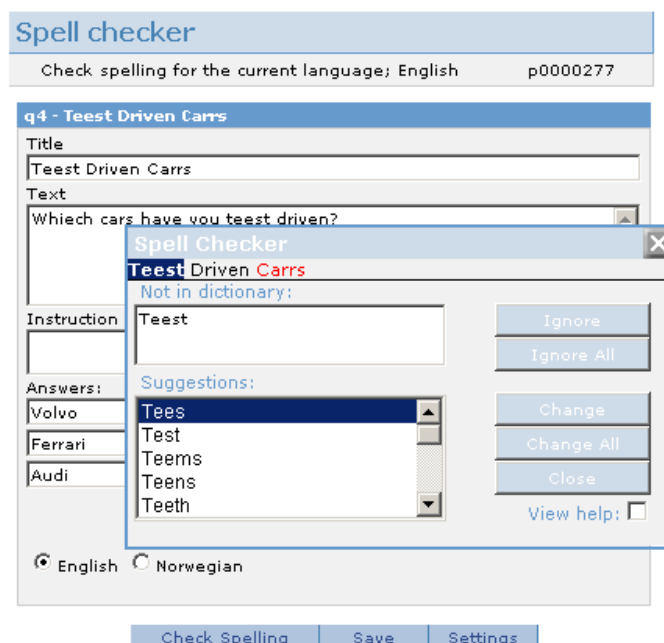


Figure 221: Spell Checker

The first misspelling the Spell Checker has found will be highlighted. It will be displayed in the *Not in dictionary* field, and all suggestions will be listed in the *Suggestions* field.

Button	Description
Ignore	The current occurrence of the misspelling will be ignored.
Ignore All	All occurrences of a misspelling will be ignored in a text field (title, text, instruction, answers).
Change	The current occurrence of the misspelling will be changed.
Change All	All occurrences of a misspelling will be changed in the current field (title, text, instruction, answers).
Close	The Spell Checker window will be closed.

Table 25: Spell Checker Settings

If there are several misspellings in a text field, the first misspelling will be highlighted and the remainder will be marked with red font.

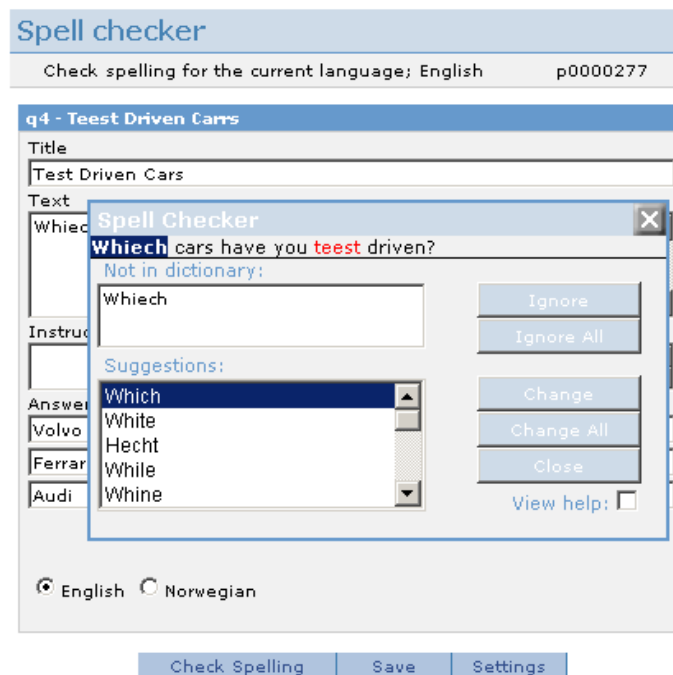


Figure 222: Several Misspellings in a Text Field

When you have chosen the correct spelling suggested by the Spell Checker, click the *Change* button to move to the next error.

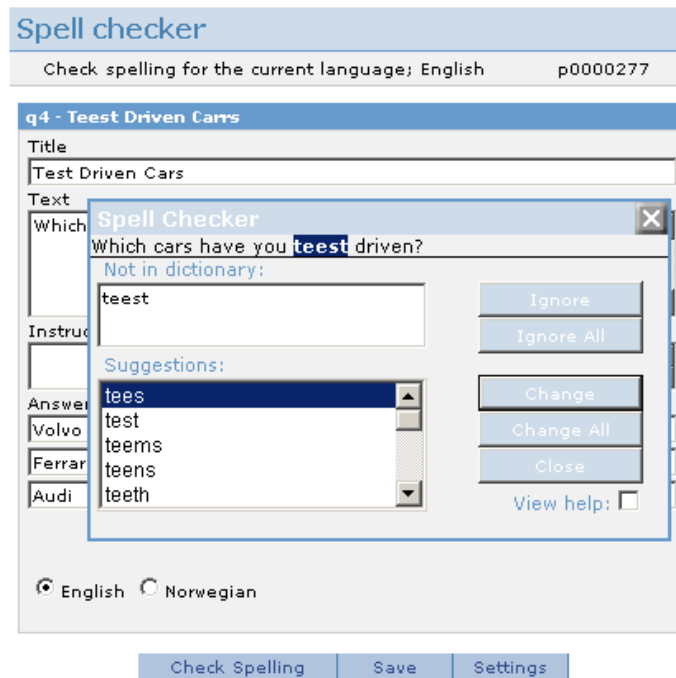


Figure 223: Next Misspelling

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

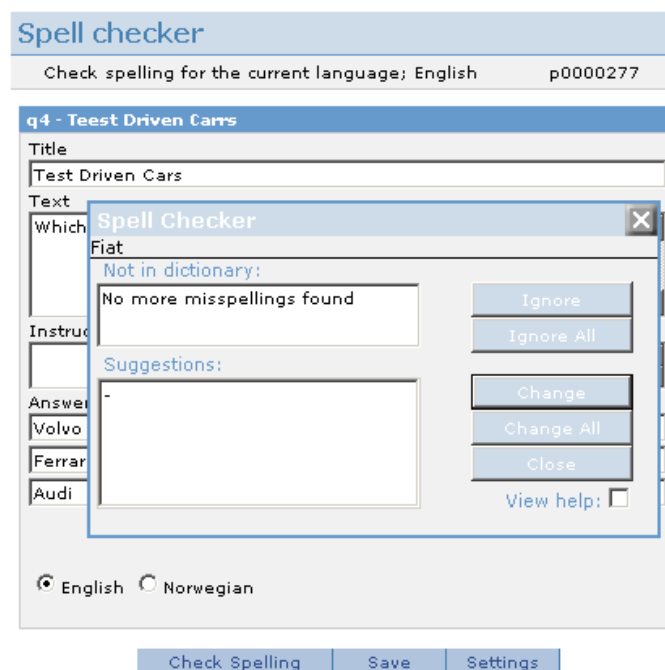


Figure 224: No More Misspellings

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 misspelling in the answer list, the correction will be applied to the list itself in Scales and Lists, as well as to all other questions this list is used.

If you check the View help check box, the Spell check help will be displayed.

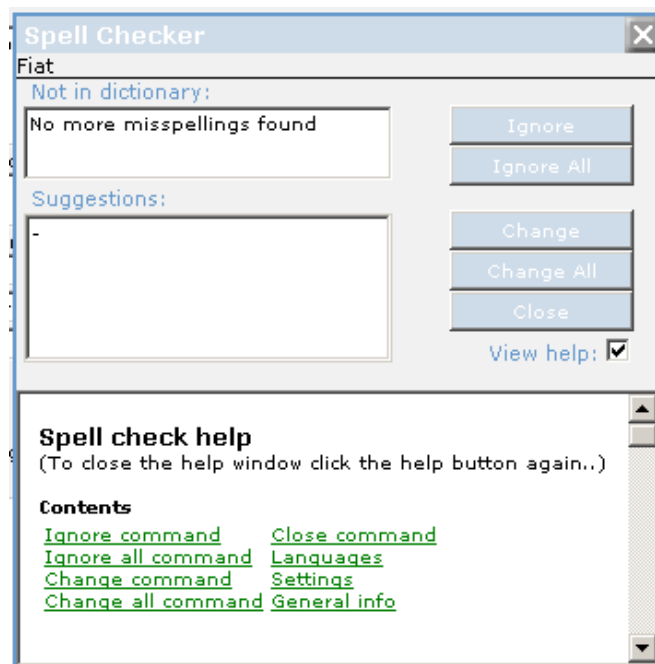


Figure 225: Spell Check Help

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.

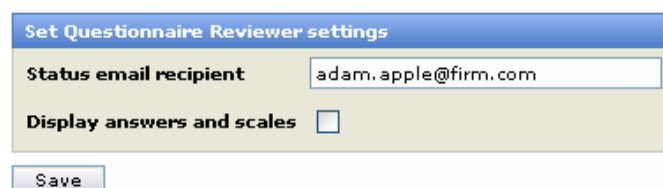


Figure 226: The Set Questionnaire Reviewer Settings dialog

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).

- **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.

The screenshot shows a dialog box titled "Send email with link to Questionnaire Reviewer". It contains the following fields and content:

- From:** adam.apple@firm.com
- To:** belinda.brant@firm.com
- Subject:** Survey 1 for review
- Body:**

Hi Belinda
 Here is the link to the survey to be reviewed. Please check the texts and correct any errors you may find. When you have finished, click Exit to close the reviewer and send an email to me listing your changes.
 Many thanks.
 Adam
- Link Expires:** 1/19/2007 (with a calendar icon)
- Buttons:** OK

Figure 227: The Send Email... dialog

2. 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.

Confirmit Questionnaire Reviewer - Microsoft Internet Explorer

File Edit View Favorites Tools Help

Address http://172.16.12.73/confirm/QuestionnaireReviewer/Default.aspx Go Links Snagit

confirmit Questionnaire Reviewer

p0403542 : nigel.bennett@confirmit.com

Exit Save Preview << Back Next >> Language English Question fav Goto

fav (SingleForm)

Title
Favorite Car

Text
Of all the cars you have test driven, which one did you like the best?

Instructions

Answers
<predefined: Car Brands>
^f("carsTested_98_other")^
I have no favorite

Done Internet

Figure 228: 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 in section 7.11.1 How to Set up the Questionnaire Reviewer.

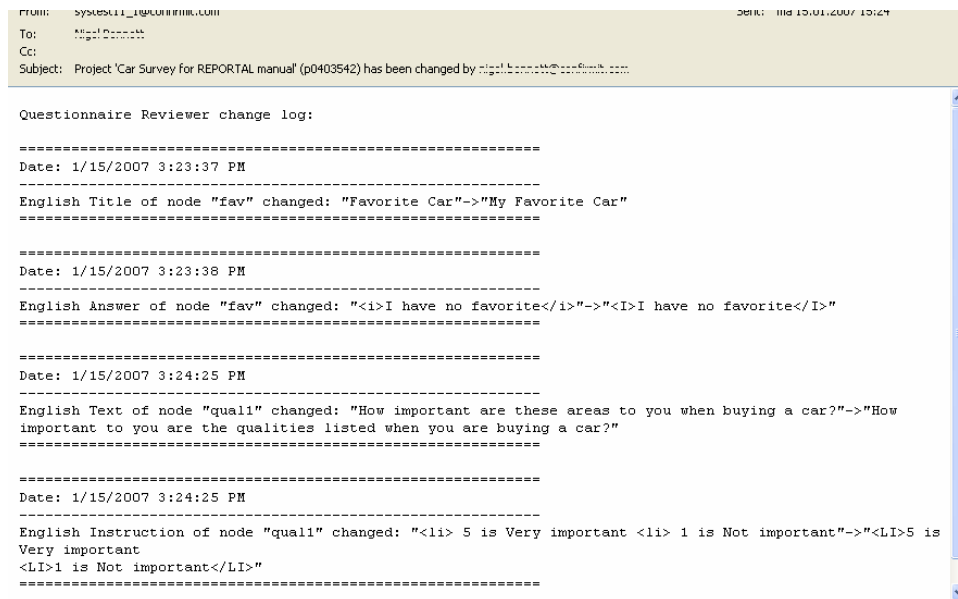


Figure 229: Example of a status email returned from a reviewer

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

8 Quotas

Within a survey, Quotas are used to limit the number of responses you would like to receive for different sub samples (target groups), or for the overall survey. When a quota is reached, the survey can automatically be closed for respondents belonging to that sub sample by using conditions and stop nodes, while it remains open for other respondents belonging to other quotas that have not yet been filled up.

Confirmit allows full quota control based on both demographical and attitudinal questions, or not based on any questions at all, for an overall quota (global quota) on number of completes. Quota control can also be achieved on compound quotas, that is quotas consisting or built on two or more variables.

Confirmit can send alerts by email when a quota is full.

Example:

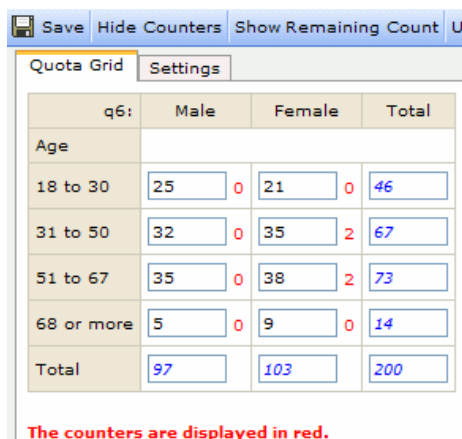
You have a pop-up survey running, and you know that the majority of people visiting the site will be young (your estimate: 5% will be 40 years or older). However, you are interested in opinions from people of 40+ as well, and you would like to have 100 responses from that sub sample. Without quota management you would have to “wait” for 2000 complete responses ($2000 \times 5\% = 100$). 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.

To terminate the survey for respondents in a target group where the quota is full, you must use a condition as described in 8.8 Terminating Interview for Respondents in Full Quotas.

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

There are two different interfaces for quota definition in Confirmit: **Grid view** and **List view**.



The screenshot shows the 'Quota Grid' interface in Confirmit. At the top, there are buttons for 'Save', 'Hide Counters', 'Show Remaining Count', and 'U'. Below these are tabs for 'Quota Grid' and 'Settings'. The main area is a table with columns for 'q6:', 'Male', 'Female', and 'Total'. The rows represent age groups: '18 to 30', '31 to 50', '51 to 67', '68 or more', and a 'Total' row. Each cell contains a numerical value in a blue box, with a red '0' next to it, indicating the current count. The total quota for each age group is shown in the 'Total' column.

q6:	Male	Female	Total
Age			
18 to 30	25 0	21 0	46
31 to 50	32 0	35 2	67
51 to 67	35 0	38 2	73
68 or more	5 0	9 0	14
Total	97	103	200

The counters are displayed in red.

Figure 230: Grid View

Grid view can be used when the quota consists of single questions only, and gives a compressed view very similar to a cross-table with one question in rows, and other questions nested in columns. Grid view is recommended when you have quotas consisting of a few questions and you define targets for all or nearly all combinations of responses to those questions.

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 mask answer alternatives that are not used for quota targets (see below). If this method will not reduce the number of cells below the limit, consider using list view instead.

Save Update Upload Limits					
Quota List Settings					
Delete Add Add All Edit					
☐	q3 (Age)	q6 (Gender)	Limit	Counter	Remaining
☐	18 to 30	Male	25	0	25
☐	18 to 30	Female	21	0	21
☐	31 to 50	Male	32	0	32
☐	31 to 50	Female	35	2	33
☐	51 to 67	Male	35	0	35
☐	51 to 67	Female	38	2	36
☐	68 or more	Male	5	0	5
☐	68 or more	Female	9	0	9

Figure 231: List View

List view is used when the quota contains one or more grid or multi questions. It is also used when the quota contains no questions; to define a global quota on total completes independent of answers to any question. It can also be used for quotas containing single questions only, and is particularly useful for such quotas when defining quota targets for a subset of the possible combinations of the responses to those questions. If defining targets for all or nearly all of the possible combinations of responses, you might find the grid view easier and faster to use.

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).

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 single questions only and the number of cells is below the limit for the maximum number of cells (see above). To open a quota in a different view than the one that is currently active, right-click the quota and select Edit in List View or Edit in Grid View. This option is only available for quotas in list view if the quota contains single questions only.

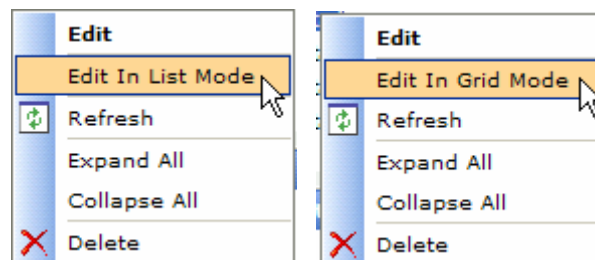


Figure 232: Opening a Grid View quota in List View and vice versa

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.

8.2 Defining Quotas and Quota Forms

Quotas are set up in the questionnaire tree, where there is a "Quotas" folder at the bottom of the tree. To create a Quota:

1. Drop a Quota object from the New Objects folder into the Quotas folder, or right-click the Quotas folder and select **Insert Quota**.

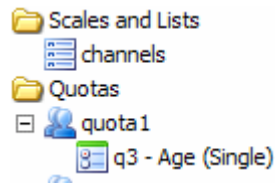


Figure 233: Adding quotas to a survey

2. Drag the questions that are relevant for the quota down to the Quotas folder, and drop them into the new quota object (drop them onto the object icon, not the text).
Only single punch, multi punch and grid questions can be used for quotas. **Forms from within loops cannot be used for quotas.** If you need to base a quota on questions within loops, you will have to 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 quota limits (see the sections below on the two different views – grid view and list view).
5. Launch the survey.
6. If you make changes in the quota definition after this (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.
7. If you add or remove questions from a quota definition, you must relaunch the survey.

8.2.1 Grid View

The grid view displays the quota definition in a table very similar to a typical cross-table, with questions in rows/columns. The different quota targets and counts are presented in the intersection between the answer alternatives of the questions in the quota.

The three examples shown below illustrate 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.

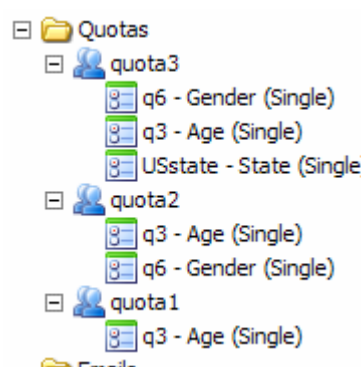


Figure 234: Example quotas

Figure 235 shows the quota grid for the quota with one question:

Save Hide Counters Show Remaining Count

Quota Grid Settings

Age		
Under 18	40	0
18 to 30	40	1
31 to 50	40	3
51 to 67	40	5
68 or more	40	0
Total	200	

The counters are displayed in red.

Figure 235: Quota based on one question

The targets here are in editable cells. The red numbers represent the counts. You can hide the Counts by clicking the **Hide Counter** button above the table.

The cells are not required. You can define quotas for some of the answers (or some combinations of answers in multidimensional quotas) only, if you like. If a cell is left blank, there will be no quota for that cell.

Here are similar examples with two and three questions in the quota:

Save Hide Counters Show Remaining Count Update

Quota Grid Settings

q6:	Male	Female	Total
Age			
18 to 30	25 0	21 0	46
31 to 50	32 0	35 2	67
51 to 67	35 0	38 2	73
68 or more	5 0	9 0	14
Total	97	103	200

The counters are displayed in red.

Figure 236: Quota with two questions

Figure 237 shows an example of a quota based on three questions:

Save Hide Counters Show Remaining Count Update Recalculate All Upload Limits

Quota Grid Settings

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 237: Quota with three questions

In settings, you can select the questions that are to be used in rows. If you have more than two questions, you can also control the nesting order in columns (which question is nested on top of which).

Row header

Column header ordering

USState

q3
q6

↑

↓

Figure 238: Row selection/column header ordering

The total numbers in blue italic are auto-populated sums from the individual quotas.

The total field is also editable. You can insert a number in a total field to define a quota on the total. This number will then be black to distinguish it from the auto-populated sums in blue italic.

You can use a combination of setting totals on rows or columns and defining specific cells, as in the example below, where the quota limit is on 14 in the age group 68 or more, regardless of gender. Actual counts for totals will only appear for totals and subtotals that have a specific target (black number). Actual counts will not appear for calculated totals and subtotals (blue numbers).

Save Hide Counters Show Remaining Count Upd

Quota Grid

q6:	Male	Female	Total
Age			
18 to 30	25 0	21 0	46
31 to 50	32 0	35 2	67
51 to 67	35 0	38 2	73
68 or more			14
Total	92	94	186

The counters are displayed in red.

Figure 239: Combining subtotals and cell targets

The calculated totals will only take quota cells into account, not subtotals. Therefore the total in the table above is 186. The 14 set for 68 or more are not included when calculating the total. Note that the blue, calculated numbers for totals and subtotals are not restrictions. In the example below, where we have not defined any limits for respondents in the age group "68 or more", we may end up with more than 186 respondents since any respondent in the age group "68 or more" will be allowed to do the survey.

Save Hide Counters Show Remaining Count Upda

Quota Grid

q6:	Male	Female	Total
Age			
18 to 30	25 0	21 0	46
31 to 50	32 0	35 2	67
51 to 67	35 0	38 2	73
68 or more			0
Total	92	94	186

The counters are displayed in red.

Figure 240: Quota definition with holes

You can also fill in a number in total, and let the system distribute this total evenly across the cells for you. This is done by entering a number in total, and then right-clicking in the total cell and selecting "Distribute".

Save [Help: Quotas](#) [How to Calculate Quota](#) [Help: Quota](#)

Quota Grid **Settings**

Warning: The quota has changed, and is not in sync with the

q6:	Male	Female	Total
Age			
18 to 30			0
31 to 50			0
51 to 67			0
68 or more			0
Total	0	0	200

 Paste

241: Distribute Quotas

It is possible to remove the totals from the quota table. It is also possible to remove some answer alternatives from the quota if there are answer alternatives that should not be part of the quota definition. This is done by right-clicking the question under the quota and selecting properties.

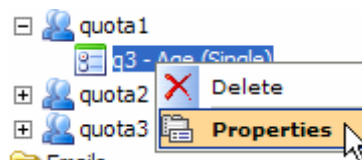


Figure 242: Opening Properties on question inside quota

In the property sheet you can deselect Totals if you don't want totals displayed in the quota table, and/or open "Exclude Precodes" to select which answer alternatives you want to exclude from the quota table.

Properties

Quota Form Node - (q3)

General

Include Totals	☒
Exclude Precodes	...

Figure 243: Properties on question inside quota

Figure 244: Exclude precodes/answers from quota table

The current count can be displayed in the quota table next to the targets. This is done by clicking "Show Counters". The counters are displayed in red. They can be hidden again by clicking "Hide Counters". If you would like to show the amount remaining to reach the target for each quota cell, you can click "Show Remaining Count".

q6:	Male	Female	Total
Age			
18 to 30	25 1	21 2	46
31 to 50	32 2	35 2	67
51 to 67	35 4	38 1	73
68 or more	5 2	9 4	14
Total	97	103	200

The counters are displayed in red.

Figure 245: Show Counters

8.2.2 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 columns, and you specify which values the different quota cells should be applied for by selecting in drop downs.

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 246: Quota details for a quota with two single questions

Click **Add** to add one row to the end of the quota table.

In addition to the answer alternatives of the question, the selection "Any" is available in the dropdown. This can be used to define quota targets for subtotals and totals – for example a combination of "Any" on gender with the age group "68 or more" would give a quota target for that age group, regardless of the gender of the respondents.

☐ 68 or more Any 14

Figure 247: Using the "Any" response selection

If you click the **Add all** button, all answer alternatives will be added for quota editing, or all possible combinations for compound quotas (quotas consisting of several variables, for example several single questions or multi or grid questions.). In Figure 246: Quota details for a quota with two single questions, all possible combinations of the age groups and the two genders would be added for quota editing when clicking Add all.

When clicking Add all, the number of quota rows that will be generated will be calculated first, and if that is above a server limit (which by default is 1000), the combinations will not be generated.

If a **multi punch question** is used for a quota, there will be one field for each answer alternative in the multi. There are three possible states as valid choices for each answer alternative in a multi:

- 'Chosen': This answer alternative has been selected.
- Not chosen: This answer alternative has not been selected
- 'Any': The answer alternative has or has not been selected, the selection will be disregarded or this quota cell.

To prevent users from accidentally altering a quota definition in list view, the quota fields are read-only when a quota is reopened. To be able to modify one or more quota cells, the user must select the check box next to the row and then click the **Edit** button.

If you have more than 25 variables (single questions and answer elements of multi and grids) in the quota definition, only the first 25 will be displayed in list view. Under settings, you can select which of the fields that should be hidden from the list view. Note that the hidden fields will still be a part of the quota definition.

The screenshot shows the 'Settings' tab for a quota. At the top are 'Save' and 'Upload Limits' buttons. Below are two tabs: 'Quota List' and 'Settings'. The 'Settings' tab is active. It contains four main sections:

- Quota name:** A text field containing 'quota3'.
- Quota full email:** A text field containing 'demo@confirmit.com'.
- Hidden columns:** A section with a description: 'These columns are included in the quota definition, but are currently not displayed in the Quota List.' Below this is a text area containing 'q4_98 (Other)' and a 'Change...' button.
- Excluded columns:** A section with a description: 'These columns will not be included in the quota definition.' Below this is a text area containing 'q4_99 (I do not watch TV)' and a 'Change...' button.

Figure 251: Hiding and excluding columns in list view

If there are fields that should not be a part of the quota definition, they can be excluded.

To select fields to hide or exclude, click the respective Change button.

8.2.3 Global Quotas

A quota without any forms inside can be used to define a global quota. A global quota is an overall target for number of completes irrespective of the respondents' answers on any questions. So if you for example 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.

The screenshot shows the 'Global Quota' interface. At the top are 'Save' and 'Update' buttons. Below are two tabs: 'Quota List' and 'Settings'. The 'Quota List' tab is active. It contains a toolbar with icons for 'Delete', 'Add', 'Add All', and 'Edit'. Below the toolbar is a table with three columns: 'Limit', 'Counter', and 'Remaining'.

Limit	Counter	Remaining
200	9	191

Figure 252: Global Quota

8.3 Changing Quotas and Quota Limits

A quota must be set up in the survey database to be ready to start counting the number of completed interviews in the different quota cells. For un-compiled quotas, a warning will be displayed telling the user to launch the survey.

The screenshot shows a software window titled 'Quota Grid' with a 'Settings' tab. A red warning message is displayed at the top: 'Warning: The quota has changed, and is not in sync with the SQL database. The changes will only be active after launching the survey.' Below the warning is a table for defining age-based quotas.

Age	
Under 18	24
18 to 30	53
31 to 50	34
51 to 67	64
68 or more	21
Total	196

Figure 253: 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 also relaunch the survey.

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 dropdown at the bottom of the page.

This allows you to test the new quota limits before updating them to the production environment. You will get a warning 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 grey background.

The screenshot shows the 'Quota Grid' window with a 'Settings' tab. A red warning message is displayed: 'Quota definition has been changed and is not in sync with the database. Cells with grey background have not been updated in the database. Please click update to apply the changes.' Below the warning is a table for defining age-based quotas with columns for 'q6:', 'Male', 'Female', and 'Total'. The 'Male' and 'Female' columns have a grey background, indicating they are not in sync with the database.

q6:	Male	Female	Total
Age			
18 to 30	25 0	21 0	46
31 to 50	32 0	35 2	67
51 to 67	35 0	38 2	73
68 or more	6 0	8 0	14
Total	98	102	200

The counters are displayed in red.

Figure 254: 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 high and the quota comprises many cells, then this may be very time-consuming. 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 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, click the **Update** button on the quota details screen. 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 the quotas are based, on you will have to update the counter manually.

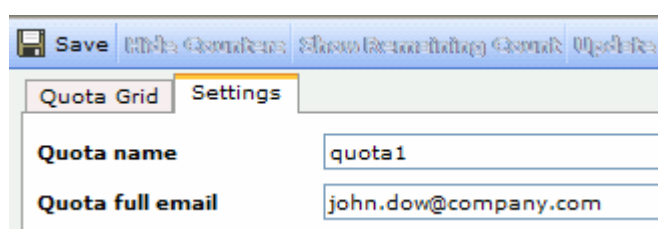
8.5 Recalculating All

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.

8.6 Email Alert on Full Quota

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



The screenshot shows a software interface with a menu bar at the top containing 'Save', 'Hide Quotas', 'Show Remaining Quota', and 'Update'. Below the menu bar, there are two tabs: 'Quota Grid' and 'Settings'. The 'Settings' tab is currently active. Under the 'Settings' tab, there are two input fields. The first is labeled 'Quota name' and contains the text 'quota1'. The second is labeled 'Quota full email' and contains the text 'john.dow@company.com'.

Figure 255: Quota full email

The quota full email will be sent when the `qf` function, explained below, returns false for the first time for a quota cell. This means the email will be sent the first time a respondent is stopped because of that quota cell having reached its limit. There will not be subsequent alerts sent for that particular quota cell.

8.7 Uploading Quota Limits

Quota limits can be imported into a quota by using a tab separated text file. There should be one row for each quota limit.

The first row must have column headers. This 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 should be "_limit". Then you add a row to the file 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:

If you have a Gender question (single) with ID "q2" and variables Male and Female with precodes 1 for Male and 2 for Female, the quota upload file could look as follows:

q1	_limit
1	100
2	100

A limit of 100 complete responses is defined for both male and female respondents.

If you have a Car question (multi) with ID "q3" and variables Volvo, Saab, BMW, Audi, and Ferrari with precodes 1, 2,3,4,5 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]

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

If you have a Car Quality Ranking question with ID "q4" , variables Speed, Safety, Sunroof, Color with precodes 1, 2,3,4,5, and Scale 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

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.

When you have created the upload file, you can click the "Upload limits" button, and browse for the file you want to upload:

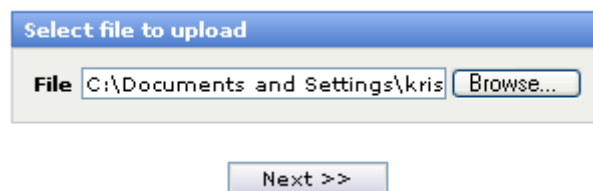


Figure 256: Select file to upload

When you have selected the file, and clicked the Next button, the Quota upload properties page will be displayed.

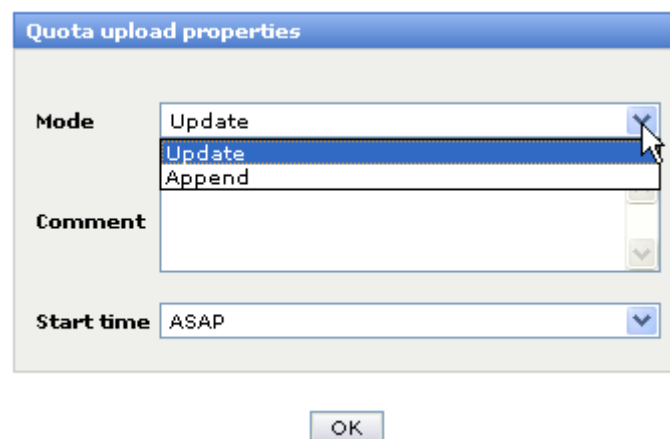


Figure 257: Quota upload properties

On this page you can define whether the current file should be appended to the existing quota limits in the quota, or whether the existing quota limits should be updated with the data in the upload file. When choosing "Append", existing quota cells will not be updated. New quota cells will be added. When updating, existing quota cells will be updated and new quota cells will be appended.

When you click OK, the task is added to Task queue and can be found under Task Management.

8.8 Terminating Interview for Respondents in Full Quotas

The quota itself is just a framework for registering how many completed interviews there are in the different quota cells. If you want to use the quotas to terminate the interview for respondents that fall into quotas that are full, you need to include a check in the questionnaire after the questions the quota is based on.

The function `qf("quotaname")` can be used to terminate interview for respondents that 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 Figure 258: Quota Condition you can stop the survey for the respondents in a full quota by using a condition and a stop node with status "Quota full".

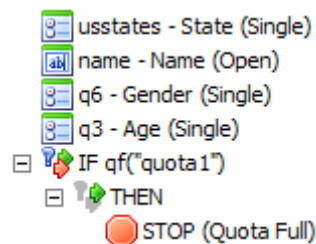


Figure 258: Quota Condition

The notification email about 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 and the quota is full. The notification email is only sent once, so you will not receive an additional email notification if you increase the quota after it has been full once.

Since the quota count is done 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 of getting quota counts that slightly exceeds the limit because respondents are past the quota check when the quota is full. If the survey is long, or there are many respondents in the survey simultaneously, the probability is higher.

Example: 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 enters and since 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 reach 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 happen after the quota is full, in which case respondents that already had 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 checking that their status isn't complete already:

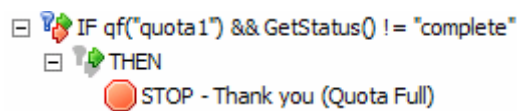


Figure 259: Quota Condition with check on Interview Status

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?

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 organisation 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 is appears in the Home menu.

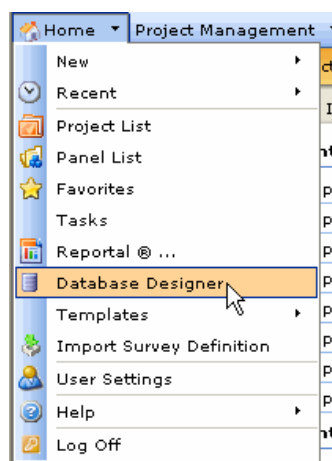


Figure 260: Entering Database Designer

9.2 Creating a Schema

To create a new database:

1. Click **New**.

The Schema Properties pane opens.

2. Give the schema a name and click **Save**.

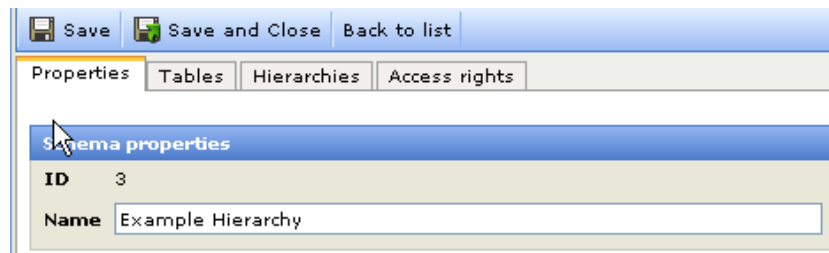


Figure 261: Creating a new schema

A new, empty database is set up and assigned an ID.

9.2.1 Inserting a New Table

To set up tables within this database:

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

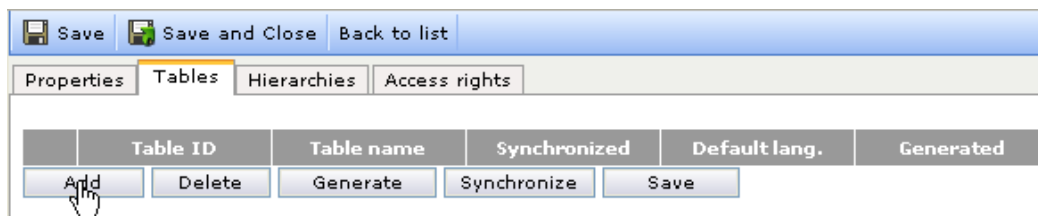


Figure 262: Adding a table to the database

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.

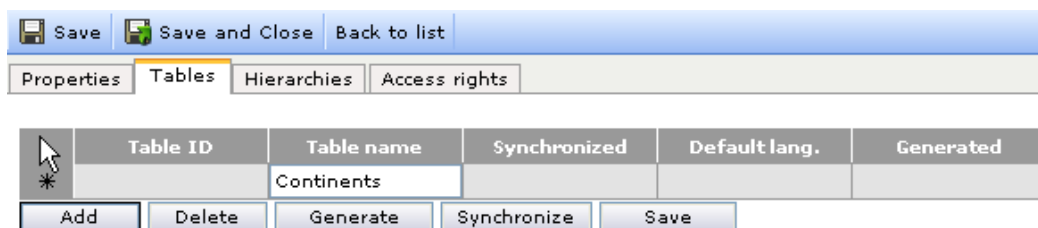


Figure 263: Entering the table name

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

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

Buttons: Add, Delete, Generate, Synchronize, Save

Table properties

Name:

PK width:

Generated: ☐ False

Synchronized: ☐ False

Languages: All languages

Selected languages:

Default language:

Figure 264: The table properties

In the table properties page 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 Conformat questions). The content of the primary key fields can be alphanumeric characters (that is letters and digits), and underscore (_) only, with no whitespace.

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

Use the Captions tab to define names for the list in the various languages you have selected. The Caption column will by default display the Table name. Click on the name in the list to modify it, then click **Save**.

ID	Caption	Language
7	Continents	English
12	Kontinenter	Norwegian

Save

Figure 265: Captions

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**.

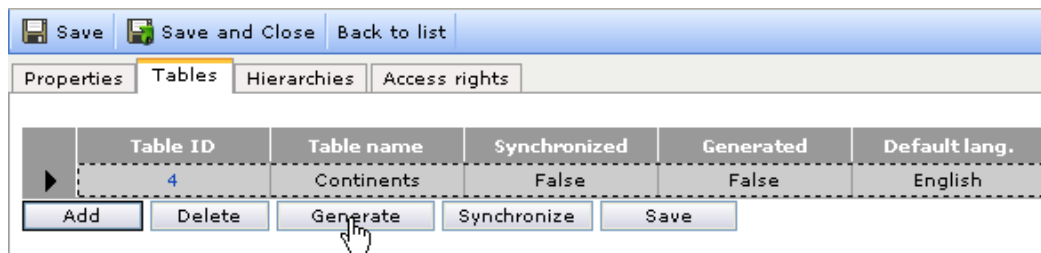


Figure 266: Generating the table

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

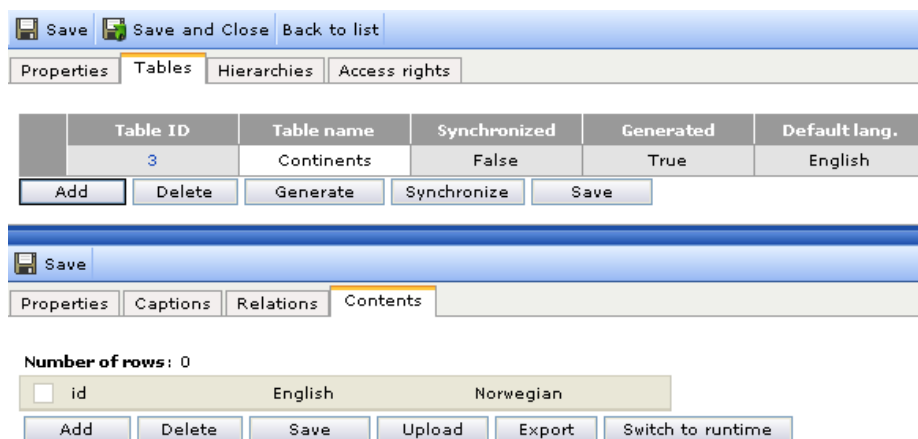


Figure 267: Adding content to the table

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.

Save

Properties Captions Relations **Contents**

Number of rows: 7

☐ id	English	Norwegian
☐ AF	Africa	Afrika
☐ AN	Antarctica	Antarktis
☐ AS	Asia	Asia
☐ AU	Australia/Oceania	Australia/Oseania
☐ EU	Europe	Europa
☐ NA	North America	Nord-Amerika
☐ SA	South America	Sør-Amerika

Add Delete Save Upload Export Switch to runtime

Figure 268: Modifying the table contents

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 have to transfer the content to the runtime mode. To do this, select the table in the table list and then select **Synchronize**. The “Synchronize” status will then change to **True**.

Save Save and Close Back to list

Properties **Tables** Hierarchies Access rights

Table ID	Table name	Synchronized	Generated	Default lang.
4	Continents	False	True	English

Add Delete Generate Synchronize Save

Figure 269: Synchronizing the table

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.

Save

Properties

Captions

Relations

Contents

Number of rows: 7

☐	id	English	Norwegian
☐	AF	Africa	Afrika
☐	AN	Antarctica	Antarktis
☐	AS	Asia	Asia
☐	AU	Australia/Oceania	Australia/Oseania
☐	EU	Europe	Europa
☐	NA	North America	Nord-Amerika
☐	SA	South America	Sør-Amerika

Add

Delete

Save

Upload

Export

Switch to design

Figure 270: 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 Confirmit you can set up two different types of hierarchies, a **balanced** (or “snowflake”) hierarchy and an **unbalanced** (or “parent-child”) hierarchy.

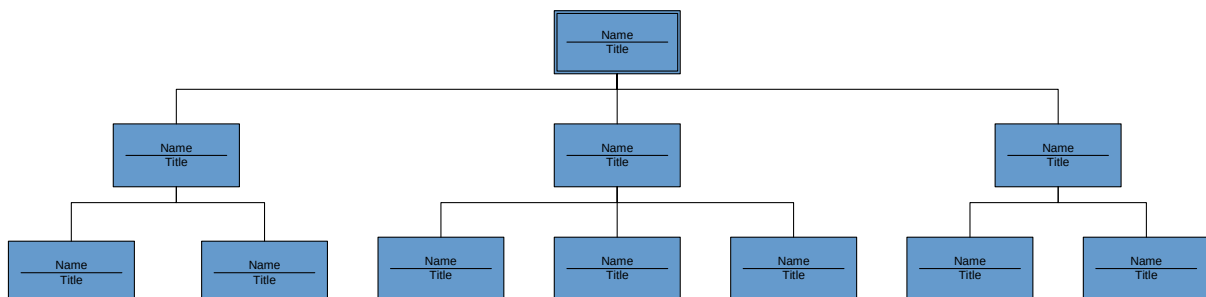


Figure 271: Balanced hierarchy

In a **balanced** (or “snowflake”) 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 Figure 271). 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 will have to select from the entities at the lowest level. An example of this is the relationship between continents and countries. See section 9.4.1 Balanced hierarchy to see how you set up a hierarchy like this.

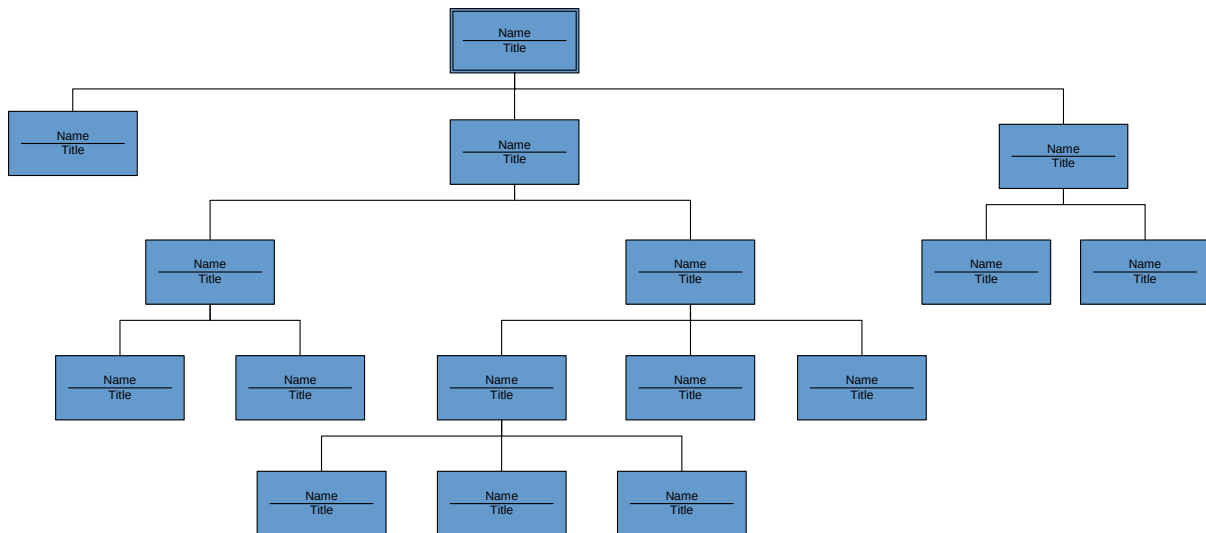


Figure 272: Unbalanced hierarchy

In an **unbalanced** (or “parent-child”) hierarchy the different branches do not need to have the same number of sublevels (see Figure 272). 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, set up a separate table for each level in the hierarchy. For example, if “Continents” is the top-level, “Countries” could be the level below.

Add a new table by clicking “add” in the table list.

Save

Save and Close

Back to list

Properties

Tables

Hierarchies

Access rights

	Table ID	Table name	Synchronized	Generated	Default lang.
	4	Continents	True	True	English
*		Countries			

Add

Delete

Generate

Synchronize

Save

Figure 273: Adding table

Click save and then click the table ID to edit properties of the new table.

Save Save and Close Back to list

Properties **Tables** Hierarchies Access rights

Table ID	Table name	Synchronized	Generated	Default lang.
4	Continents	True	True	English
7	Countries	False	False	English

Add Delete Generate Synchronize Save

Save

Properties **Captions** Relations Contents

Table properties

Name: Countries

PK width: 32

Generated: False

Synchronized: False

Languages: All languages

Selected languages: English, Norwegian

Default language: English

Figure 274: Table properties

Select English and Norwegian as languages, then go to “Captions” and enter names for two languages:

Save

Properties **Captions** Relations Contents

ID	Caption	Language
13	Countries	English
14	Land	Norwegian

Save

Figure 275: Captions

In “Relations” 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”. So in “Relations” of the “Countries” table, set up a relationship by clicking “Add”, give the relation a name (here: “r1”) and define “Continents” as the parent table:

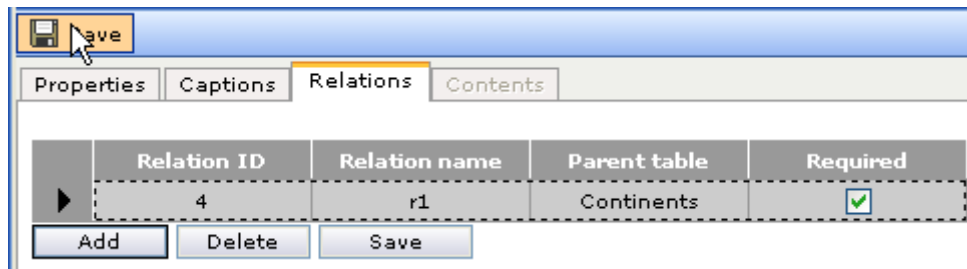


Figure 276: Relations

The "Required" setting defines whether it should be required or not to define a "parent" for each "child". Here every country should belong to a continent, so the required property is set. If the required property were not set, it would not be required to assign each country to a continent.

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

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

Now, when you enter "Contents" of the "Countries" table, you will see that the table will have the relationship as an extra column, after id and the languages.



Figure 277: Table contents

Add id and texts as previously described. The relationship is specified by the code of the continent (for example EU for Europe from the previous example). You can also click the button next to the relationship field to search from the list in the "Continents" table.

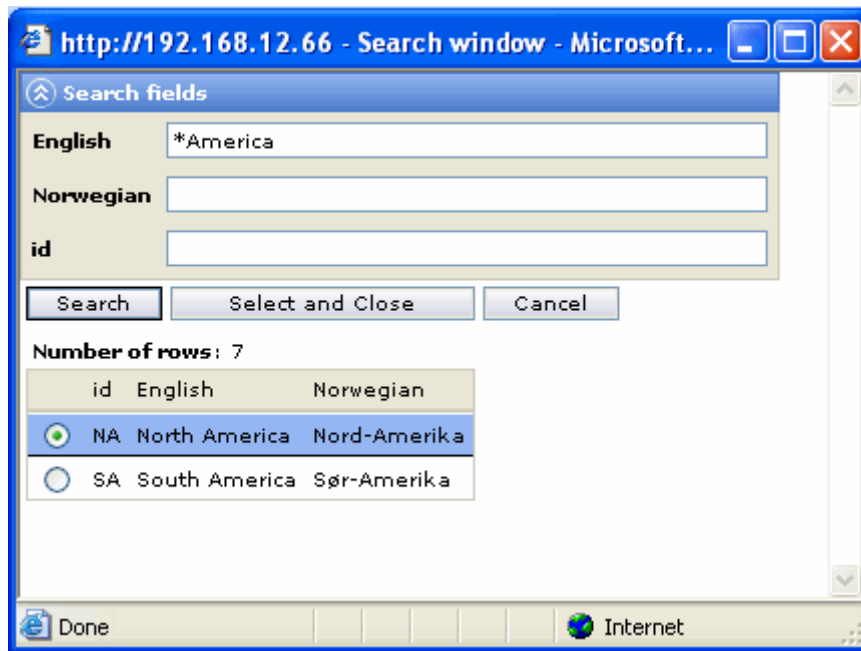


Figure 278: Search window

Search in the text fields in the different languages with * 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, etc. For simplicity, this 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.

Add a new hierarchy by clicking "Add", insert a name by clicking in the name field, and then click "Save". To set up the properties of the hierarchy, click the hierarchy id.



Figure 279: 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.

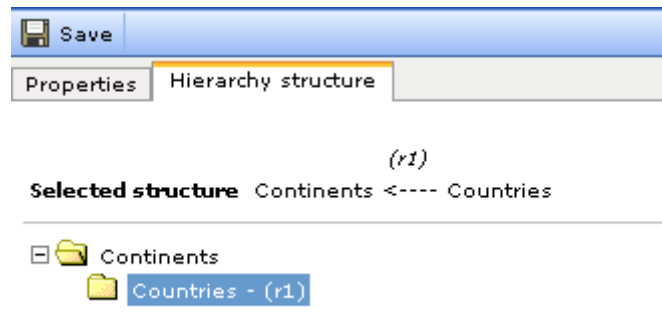


Figure 280: Hierarchy structure

9.4.2 Unbalanced hierarchy

Instead of defining one table per hierarchy level, all levels are defined in the same table when you set up an unbalanced hierarchy.

For example, let us say we have a company "The Company" with the following organization structure:

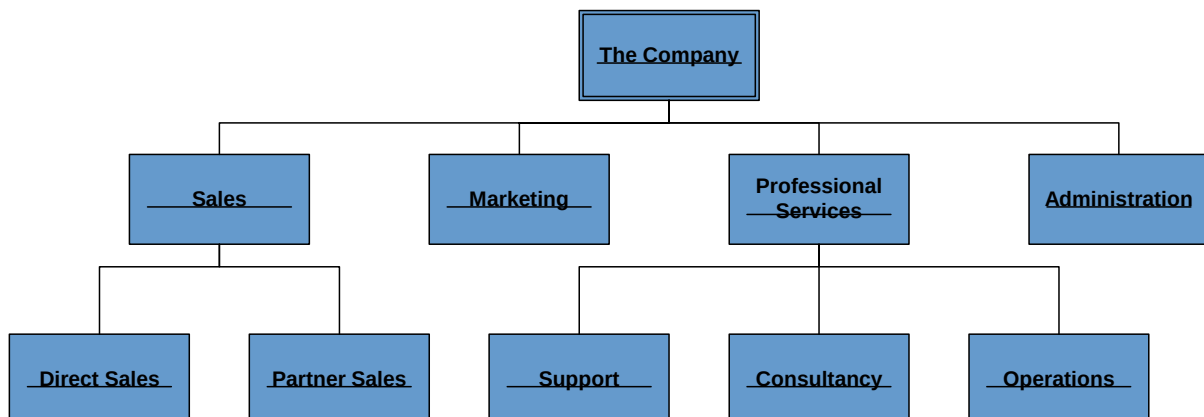


Figure 281: Example of organisation hierarchy in "The Company"

This hierarchy will be set up in the table "companytable". Click "Add" in the "Tables" tab. Then give the table the name "companytable".

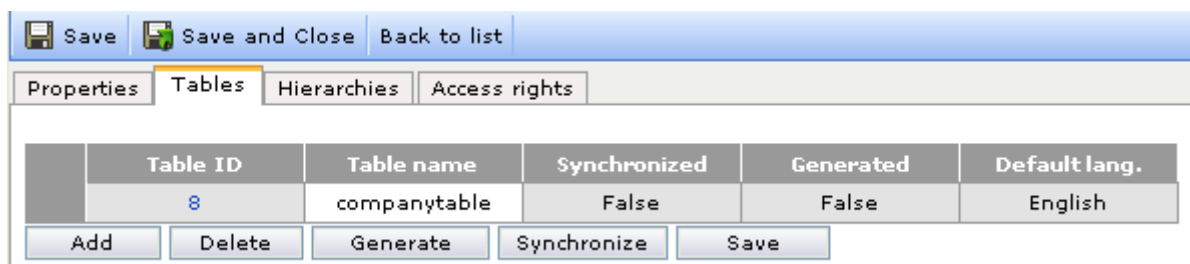


Figure 282: Table list

Then click the table ID and set up the language(s) you want to use and, if needed, change the width of the “primary key” field that will hold the unique ids (codes) of the entities in the table. Assign name(s) to the table in the “Captions” tab. Then go to the “Relations” tab and add a relation to the same table (a self-referencing relation):

Relation ID	Relation name	Parent table	Required
5	selfref	companytable	☐

Figure 283: Setting up self-referencing relation

This relation must be set up as not required (do not check off the “Required” check box), since the top level does not have any entity to refer to above it.

Then 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.

Table ID	Table name	Synchronized	Generated	Default lang.
8	companytable	False	False	English

Figure 284: Generate table

Then go back to the table to define the table content. The hierarchy of “The company” can be set up with the following table:

Save

Properties Captions Relations **Contents**

Number of rows: 10

☐ id	English	selfref (companytable)
☐ TOP	The Company	...
☐ SALES	Sales	TOP
☐ DIRSALES	Direct Sales	SALES
☐ PARTSALES	Partner Sales	SALES
☐ MARK	Marketing	TOP
☐ PROS	Professional Service	TOP
☐ SUPP	Support	PROS
☐ CONS	Consultancy	PROS
☐ OPS	Operations	PROS
☐ ADM	Administration	TOP

Add Delete Save Upload Switch to runtime

Figure 285: Self-referencing table

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":

Save **Save and Close** Back to list

Properties **Hierarchies** Tables Access rights

Hierarchy ID	Hierarchy name
4	companyhierarchy

Add Delete Save

Figure 286: Adding hierarchy

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

Save

Properties **Hierarchy structure**

(selfref)

Selected structure companytable <---- companytable

companytable

Figure 287: Selecting relations in the hierarchy

9.5 Uploading and exporting table contents

If you have a very long list, you may want to upload it as a file instead of entering the items through the interface. This can be done by clicking the “Upload” button in the “Contents” tab of the table. Browse for the file or enter the path directly. Then the file will be uploaded to the server.

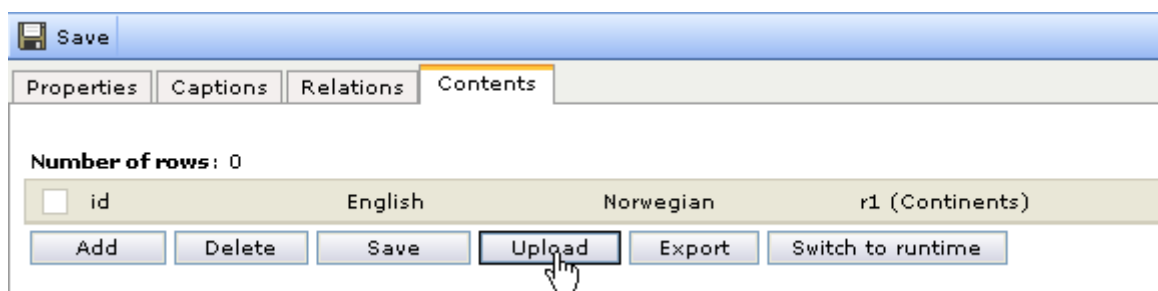


Figure 288: Upload

You will then be presented with options of how you want to upload the file. Cancel will abort and leave the table unchanged. Overwrite will remove current content and replace it with the contents of the file. Append/update will merge the current content with the content of the file, based on the id field. If a code in the id column already is 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. After selecting 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 in the table.



Figure 289: File upload

The file to be uploaded must be in tab-delimited ASCII text format (for example easily available from “Save as” or “Export” in applications like MS Excel®). This ASCII file may also be zipped and uploaded as .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. The language codes are listed in APPENDIX B: Confirmit LANGUAGE CODES.
<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 from Figure 268 could have been uploaded from a file like this:

	A	B	C
1	id	I9	I20
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 290: Continents file

The “Countries” table could be uploaded from a file like this (extract):

	A	B	C	D
1	id	I9	I20	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 291: Countries file

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

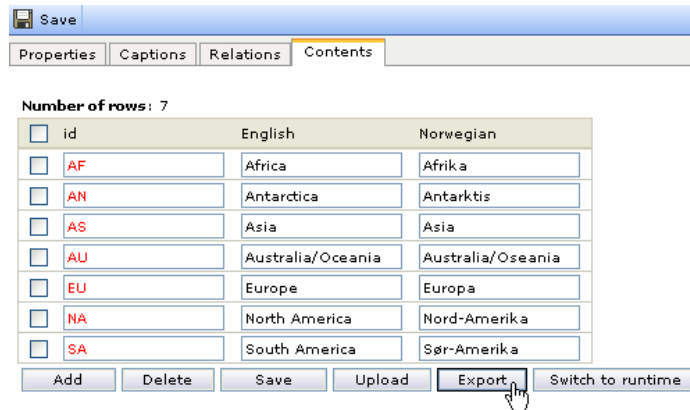


Figure 292: Export table contents

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. Then the user will be able to give other users access as well.

9.7 Using Table or Hierarchy Lookup in the Questionnaire

The tables or hierarchies can be used on single questions in the questionnaire. In the properties of the single questions you may choose “Normal answer list”, “Table lookup” or “Hierarchy lookup” from the “Answers” dropdown.

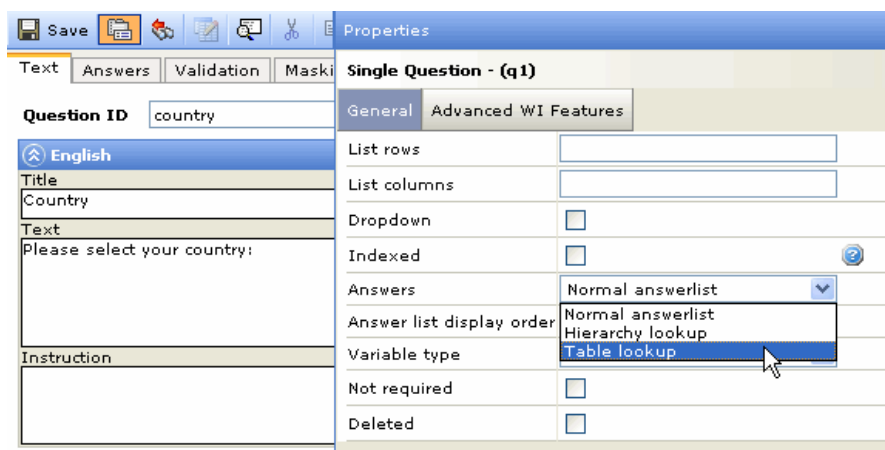


Figure 293: Single question properties

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

When “Table lookup” is selected, the “Answers” tab will present an interface for selecting a database schema and one of the tables in that schema.

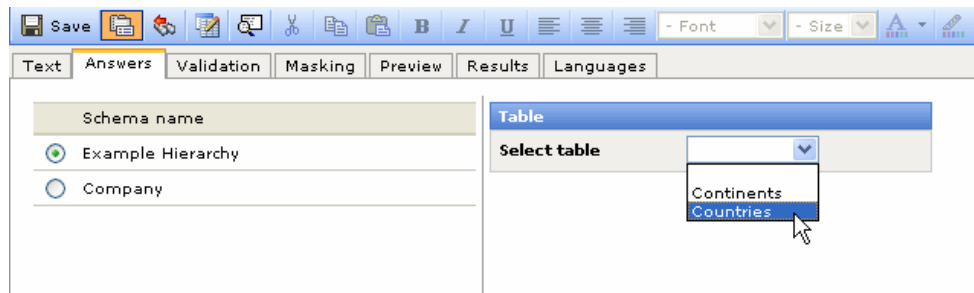


Figure 294: Selecting table for "Table lookup"

The question will then be presented as an ordinary single question according to your settings in properties, retrieving 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 have an interface for selecting a database schema and a hierarchy from that schema.

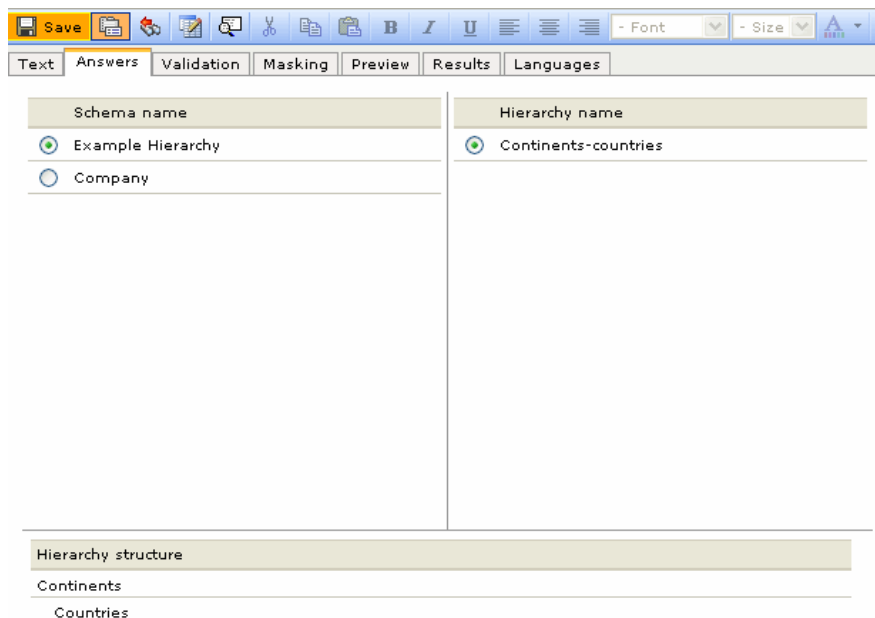


Figure 295: Selecting hierarchy for "Hierarchy lookup"

The hierarchy question type will give a special interface for the respondent. The question will be presented with a button that the respondent can click on and get a pop-up window where they can search in the hierarchy tree for their answer. The answers will be alphabetically sorted. This functionality requires that the respondent has a JavaScript enabled browser. Recommended browsers are IE5, Netscape 6, Opera 7 or Mozilla.

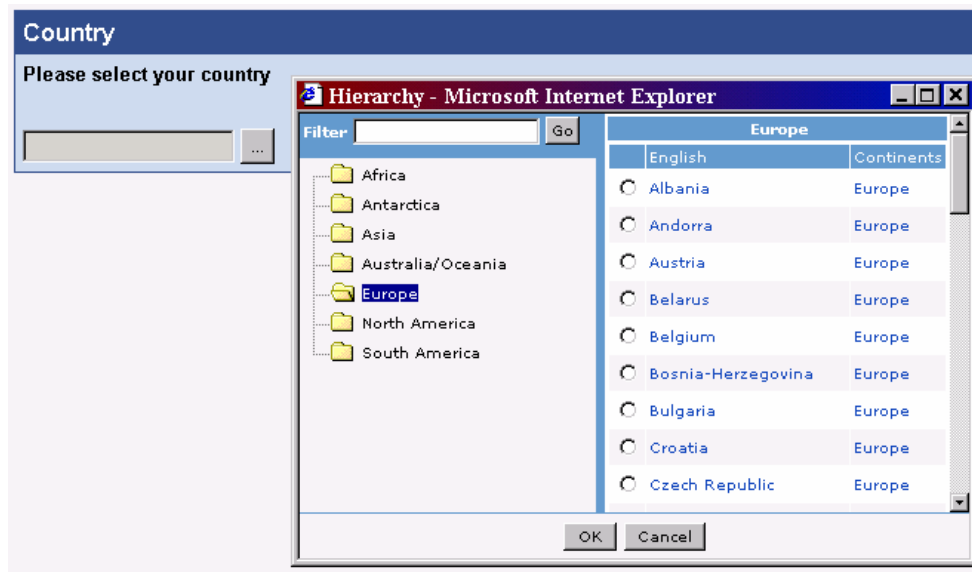


Figure 296: Respondent interface of hierarchical question

When the respondent has selected his/her answer and clicked OK, the text of that answer will appear in the text box of the question:



Figure 297: Item selected on 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:

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

The Translation Overview page opens as shown in Figure 299.

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:

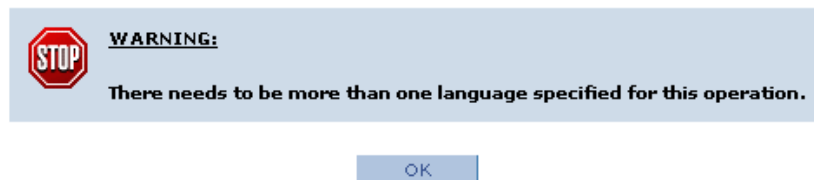
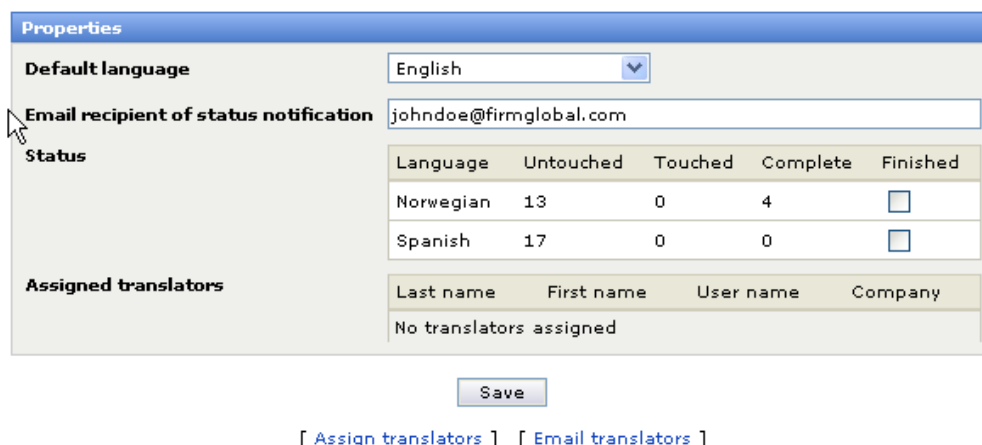


Figure 298: Warning when not a multilingual project

10.2 Assigning Translators to Projects

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

The form is titled "Properties" in a blue header bar. It contains several sections: "Default language" with a dropdown menu set to "English"; "Email recipient of status notification" with a text field containing "johndoe@firmglobal.com"; "Status" which includes a table with columns "Language", "Untouched", "Touched", "Complete", and "Finished", showing data for "Norwegian" and "Spanish"; and "Assigned translators" which includes a table with columns "Last name", "First name", "User name", and "Company", showing "No translators assigned". At the bottom is a "Save" button and two links: "[Assign translators]" and "[Email translators]".

Language	Untouched	Touched	Complete	Finished
Norwegian	13	0	4	☐
Spanish	17	0	0	☐

Figure 299: Translation overview with no assigned translators

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.

To assign translators, click on the *Assign translators* link. This opens the Assign Translators page. On this page, in the Available column, select the appropriate translators and click the >> button to move them to the Selected column.

Figure 300: Assign translators

If you enter the Translation Overview page after having select the translators, they will be displayed in the Assigned translators window.

Language	Untouched	Touched	Complete	Finished
Norwegian	13	0	4	☐
Spanish	17	0	0	☐

Last name	First name	User name	Company
Translator	Translator	translator	User Guide Company
Translator 1	Translator 1	translator1	User Guide Company

[Assign translators] [Email translators]

Figure 301: Translation overview with assigned translators

10.2.1 Assigning Translators from Other Company

You can also give translator permissions to translators who are users under another company on your server. This must be done via the project that is to be translated.

To give permissions to a project to users outside your company, you must copy the user's User key from his user settings:

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

Figure 302: Copying user key

Then you have to go to the Project Overview of the project, and click Object Permissions link. Click the Add Users button, and an open text field where you can paste in the User key, will appear:

Enter keys of new users

JICBJQFSPAWE PDNGK
VNUJFWX

Add

Figure 303: Adding a new user

Note: Ensure that you do not have any whitespace before and after the User Key.

Clicking the Add button, will add the user to the Object permissions list under Other users/Groups.

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

Figure 304: A user added under other users/groups

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

Other users/groups	Sarah Jones (usermanual)	Translator 3 Translator 3 (translat

Figure 305: A new user displayed in Translation overview

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

Properties

Default language

English

Email recipient of status notification

johndoe@userguidecomp.com

Status

Language	Untouched	Touched	Complete	Finished
Norwegian	5	0	0	☐

Assigned translators

Last name	First name	User name	Company
Translator	Translator	translator	User Guide Company
Translator 1	Translator 1	translator1	User Guide Company
Translator 3	Translator 3	translator3	Translators Ltd.

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

Figure 306: 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 under different companies on your server. By adding translators to a group you avoid giving project access to them on individual level. Contact your Confrimit Administrator to create users and groups.

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

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

Figure 307: Group displayed in Object permissions

The new group will also be displayed in the Translation overview under Assign Translators.

Once the group has been assigned to the project, all translators in the group will be displayed under Assigned Translators.

Properties

Default language English

Email recipient of status notification johndoe@userguidecomp.com

Status

Language	Untouched	Touched	Complete	Finished
Norwegian	5	0	0	☐

Assigned translators

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

Save

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

Figure 308: All translators in the group 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.

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

Options

Encoding Western European (ISO)

Send as HTML ☐

Sender johndoe@userguidecomp.com

Subject

Body

Include link ☐

Cancel < Back Next > Finish

Figure 309: Translator selection

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).

Step 1/2: Translator selection

Please specify recipient selection and email settings. p0012322

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

Options

Email format

MIME encoded ▼

Encoding

Western European (ISO) ▼

Send as HTML

☐

Sender

kristinem@firmglobal.com

Subject

Norwegian and Spanish Translations

Body

Dear ^firstname^ ^lastname^,

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

Include link

☒

Cancel
< Back
Next >
Finish

Figure 310: Translator selection 2

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

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

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

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

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

Email preview (translator # 1)

To translator@firmglobal.com

From johndoe@userguidecomp.com

Subject Norwegian and Spanish Translations

Body

Dear Translator Translator,

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

<http://192.168.12.66/confirm/translator>

Cancel

< Back

Next >

Finish

Figure 311: Preview and send

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

Confirmation

p0278724

Confirmation

Finished sending 2 email(s).

OK

Figure 312: Confirmation message

10.4 Translators' Interface

The translators will 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 server customers the address will be: <http://yourconfirmitserver.com/confirm/translator/>.

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

Click the link to display the login page:

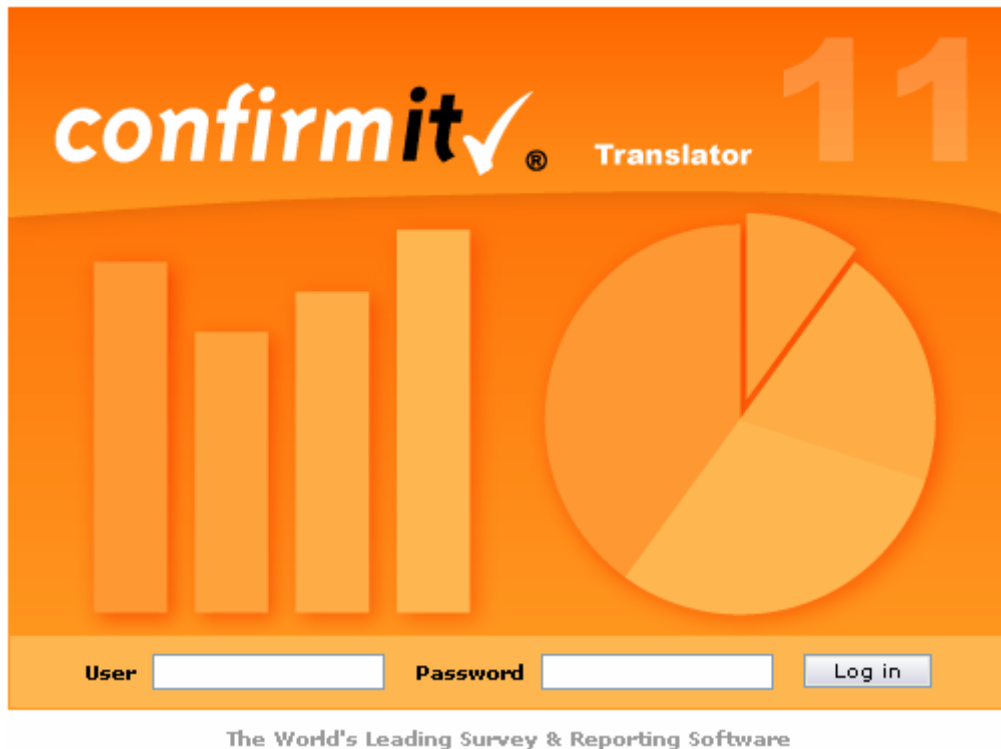


Figure 313: Translators' login page

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.

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

Figure 314: Translators' project list

10.4.1 Translator

Click on the language to display the Translator for this language.

Figure 315: Translator

The default language will be displayed on the left side.

Field/Button	Description
Finish	When the questionnaire is translated into the working language, you can click Finish. Note: Click Save button 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 in there.
Close	Clicking this button will bring you back to Project Overview. Note: Click Save

	button first to save the changes.
Save	Saves the changes made to the working language.
Preview	Clicking this button will display the preview of the question: the default language and the working language. Note: Click Save button first to save the changes.
Back	Will go back to the previous question in the questionnaire routing
Next	Will display the next question in the questionnaire routing
Go to	Choose a question from the dropdown, and the question will be displayed in the Translator.
Filter	You can set filter in order to display only Touched, Untouched, and Complete questions.
Overall Status	The status of how many items (includes scales/lists) are Complete, Touched, or Untouched will be displayed here. The status will be 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 target language.

Table 26: Translator properties

The predefined Scales/Lists will be displayed first in the Translator.

The new language status will be displayed in the Translation Overview:

Translation overview

Set the translation details for the current project p0379335

Properties

Default language English

Recipient of status notification kristinem@firmglobal.com

Status

Language	Untouched	Touched	Complete	Finished
Norwegian	11	0	14	☐
Spanish	25	0	0	☐

Assigned translators

Last name	First name	User name	Company
Translator	Translator	translator1	FIRM AS
Translator1	Translator1	translator2	FIRM AS

Save

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

Figure 316: Translation overview with updated language status

Once the translator has finished translating the last question in the routing, the message *End of routing* will be displayed.

[<< Back](#)
[Next >>](#)

[Goto](#)

End of routing

Question properties	
Question id	q14b (GridForm)
Question status	complete

Figure 317: End of routing in translator

When the translator has finished translating the questionnaire, and has saved and clicked Finish button, a message will be sent to Project owner, for example " Translator Translator (translator1) has finished the Norwegian translation for project p0379335."

The status will be updated in the Translation Overview in Confirmit, see picture below.

Translation overview

Set the translation details for the current project
p0379335

Properties

Default language
English

Recipient of status notification
kristinem@firmglobal.com

Status

Language	Untouched	Touched	Complete	Finished
Norwegian	0	0	25	☒
Spanish	25	0	0	☐

Assigned translators

Last name	First name	User name	Company
Translator	Translator	translator1	FIRM AS
Translator1	Translator1	translator2	FIRM AS

[Save](#)

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

Figure 318: Finished translation

The project manager can change the status by unchecking the Finished checkbox and clicking 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.

When you have created the survey definition in the base language, for example English, go to the Translation menu and select Export Translation XML:

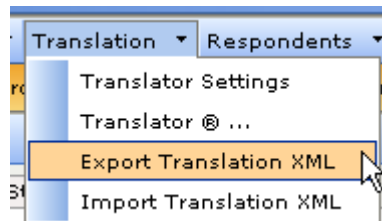


Figure 319: Export Translation XML

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. Select the language from the **Target language** dropdown. Existing project languages (added in Project Management > Overview > Languages, but not necessarily containing texts in the survey definition) are displayed in the **Base language** dropdown. Here you 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!

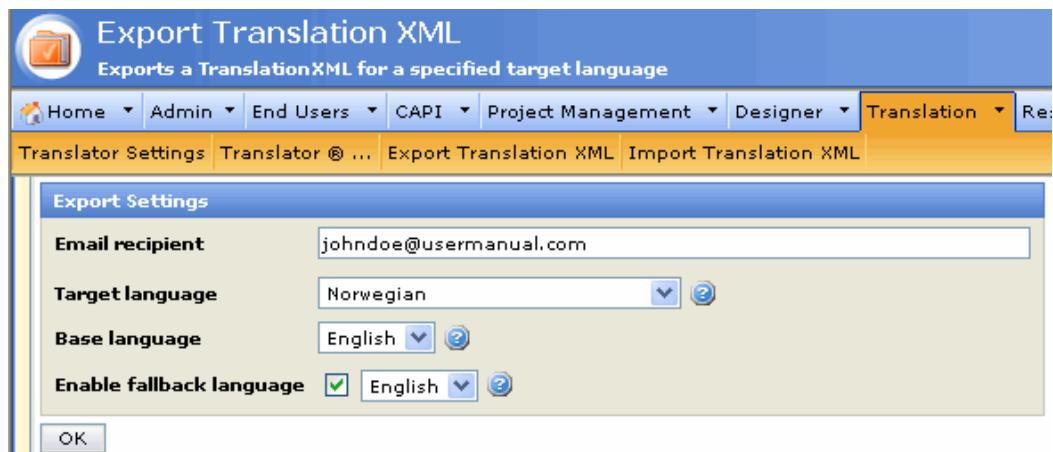
A screenshot of the 'Export Translation XML' dialog box. The title bar says 'Export Translation XML' and 'Exports a TranslationXML for a specified target language'. Below the title bar is a navigation bar with tabs: 'Translator Settings', 'Translator @ ...', 'Export Translation XML' (selected), and 'Import Translation XML'. The main area is titled 'Export Settings' and contains the following fields: 'Email recipient' with the value 'johndoe@usermanual.com', 'Target language' with a dropdown menu showing 'Norwegian', 'Base language' with a dropdown menu showing 'English', and 'Enable fallback language' with a checked checkbox and a dropdown menu showing 'English'. There is an 'OK' button at the bottom left.

Figure 320: Export Settings

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).

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 TranslationXMLs. 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 Conformat 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.

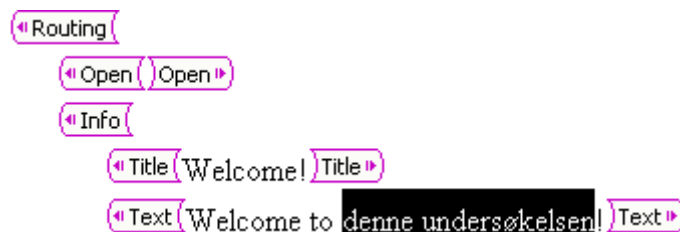


Figure 321: Translating in XML Word

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

12.1 Introduction

Most questionnaires contain some amount of 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 if a question should be displayed or not
- For filtering 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 and
- In general-purpose code contained in script nodes.

Confirmit uses Microsoft's JScript .NET as scripting language. The runtime environment of the interview engine (or simply *the runtime*) supplies a number of functions and objects that provide references to and let you manipulate survey variables.

This chapter describes briefly how to refer to survey variables. For a more thorough reference manual to scripting in Confirmit, see Confirmit Scripting Manual.

Note: The functions used here are not described in detail. They are described in the context they are used most often, (for example `union()` in the precode masks section), but that does not mean that they are in any way restricted to being used in just that context.

12.2 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.

12.2.1 *f*("qID")

Its basic syntax is `f ("qID")`, where *qID* is the question ID specified in Properties (see section 7.2.3.10 Question Properties). The values returned are different for different question types, 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 (see section 7.2.3.10 Question Properties)	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.

*Table 27: Values returned from *f*("qID") for different question types*

12.2.1.1 Single

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

Figure 322: Answer list of single question "gender"

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

12.2.1.2 Open Text

Name

What is your name?

John Smith

Figure 323: Open Text question "name"

Here, the code `f("name")` will return **John Smith**.

12.2.1.3 Multi

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

Figure 324: Answer list of 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.

12.2.1.4 Multi with OpenText or Ordered Property Checked

The screenshot shows a question titled "Rank" in a blue header. Below the header, the text "Please rank the channels you watch on a regular basis, 1 being the one you like best." is displayed. There are three rows of input fields, each with a small box for the rank and a label for the channel. The first row has a box with "2" and the label "ABC". The second row has a box with "3" and the label "CNN". The third row has a box with "1" and the label "NBC".

Rank	
Please rank the channels you watch on a regular basis, 1 being the one you like best.	
2	ABC
3	CNN
1	NBC

Figure 325: 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.

The screenshot shows a question titled "Favorite program" in a blue header. Below the header, the text "What is your favorite program on these channels?" is displayed. There are three rows, each with a channel label and a text input box. The first row has "ABC" and "NYPD Blue". The second row has "CNN" and an empty box. The third row has "NBC" and "Friends".

Favorite program	
What is your favorite program on these channels?	
ABC	NYPD Blue
CNN	
NBC	Friends

Figure 326: 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*. More on filtering with "precode masks" in section 12.4 Precode and Scale Masks /Filtering Answer Lists/Scales.)

12.2.1.5 Grid

Hours watching

How many hours per week do you watch these channels?

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

Figure 327: 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.

12.2.1.6 Other, Specify

Answers									
English	Precode	Weight	RdgSingle%	ColWidth	BgColor	Punch	KeepPos	Other	
ABC	1								
CBS	2								
CNN	3								
FOX	4								
NBC	5								
Other, specify	6							Yes	
None of them	99								

Figure 328: Answer list of single question "favorite"

Favorite TV channel

What is your favorite TV channel?

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

Figure 329: Single question "favorite"

An Other text box will have the "question id"+_+"precode"+_other as its variable name, here it would be `favorite_6_other`. The code `f("favorite_6_other")` will in this case 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.

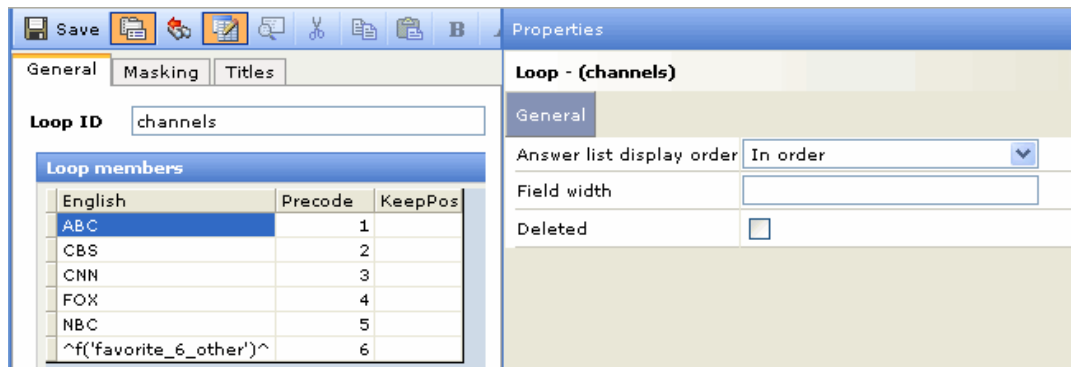


Figure 330: Other, specify in loops

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

12.2.2 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 (see section 7.2.3.10 Question Properties for an explanation of how they are stored). 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"]`

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.

Table 28: Values returned from f("qID")["precode"] for different question types

12.2.2.1 Multi

If we use the same example as in section 12.2.1.3 Multi, 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).

12.2.2.2 Multi with Ordered Property Checked

Using the same example as in section 12.2.1.4 Multi with OpenText or Ordered Property Checked, 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).

12.2.2.3 Multi with OpenText Property Checked

Using the multi question *program* from section 12.2.1.4 Multi with OpenText or Ordered Property Checked, `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*.

12.2.2.4 Grids

See the example in section 12.2.1.5 Grid, the grid *hours*. Using the answers from that example, `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 as in Figure below.

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

Figure 331: Scale of grid "hours"

12.2.3 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 the list of channels in the question *TVchannels* from section 12.2.2.1 Multi. 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.

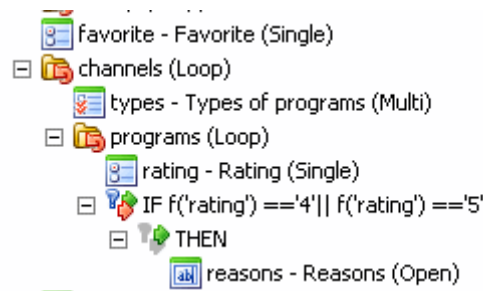


Figure 332: Nested loops

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 Figure 333: The inner loop) as this is the first iteration.



General Masking Titles

Loop ID: programs

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

Add Add predefined Clear Delete

General Masking Titles

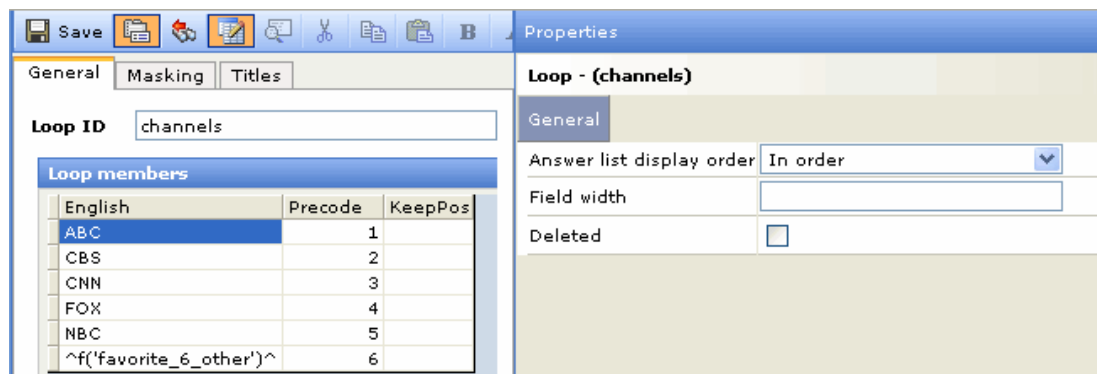
Precode mask

f('types')

Figure 333: 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 Figure 334: The outer loop, "channels"). Note the order: The innermost loop first. An expression such as `f("rating")` outside the loops would not make much sense.



Save Print Undo Redo Find Copy Paste Bold

General Masking Titles

Loop ID: channels

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

Properties

Loop - (channels)

General

Answer list display order: In order

Field width:

Deleted: ☐

Figure 334: 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. For further information, see section 12.7 Text Substitution/Response Piping.

12.3 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	

Table 29: Jscript logical operators

12.3.1 .inc()

As described in section 12.2.1 `f("qID")`, `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`.

12.3.2 .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.

12.3.3 .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, so the `f` function always returns strings or sets of strings. Because of this you have to be a bit careful when using greater than (`>`) or less than (`<`). If you consider how you sort items alphabetically (like in a dictionary) a sequence of numbers 1,2,3,...,10,11 will be sorted like this: 1,10,11,2,3,...,9 when sorted as strings. So actually `f("q1")<'3'` will be TRUE for the numbers 1,10,11 and 2, and that was probably not your intention. You will have to force the precodes to numbers before doing 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.

12.4 Precode and Scale Masks /Filtering Answer Lists/Scales

Precode masks are used to filter answer lists of 3dgrids, grids, single and multi questions and to select a set of iterations for a loop. In the precode mask field in Properties of a question (see section 7.2.3.10 Question Properties) or in the loop construct (see section 7.2.8 Loops) 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 the Properties of a grid question (see section 7.2.3.10 Question Properties) 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 section 12.2.2.1 Multi 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 section 12.2.1.4 Multi with OpenText or Ordered Property Checked and section 12.2.1.5 Grid 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.

These are other functions that are useful when constructing sets of precodes:

12.4.1 a("qID")

a("qID") returns the complete set of precodes defined in the answer list belonging to qID, no matter if they are answered or not.

12.4.2 set(), nset(), nnset()

Sometimes you need to create sets yourself. These three functions simplify this.

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.

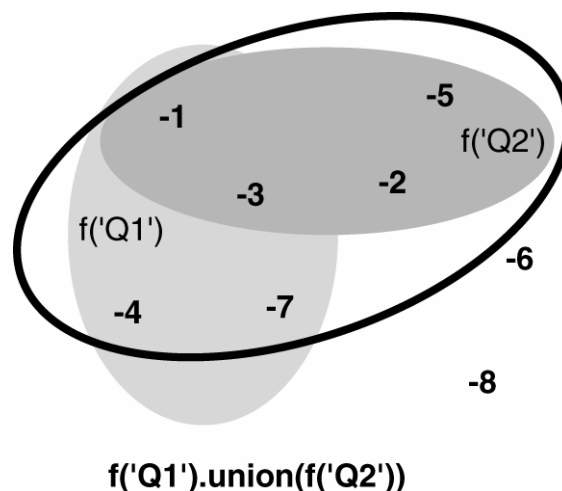
nset(n) returns a set populated with the members 1, 2, 3, ..., n. nset(3) gives the same as the previous example, a set consisting of the precodes 1, 2 and 3.

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.

12.4.3 .union()

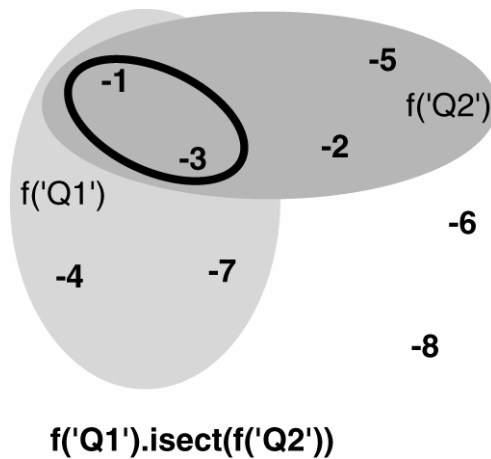
f('Q1').union(f('Q2')) returns a new set that is the union of f('Q1') and f('Q2'), that is a set consisting of all precodes answered to either Q1 or Q2. If you want to add specific precodes to a set in a precode mask, then use .union() in combination with set().



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

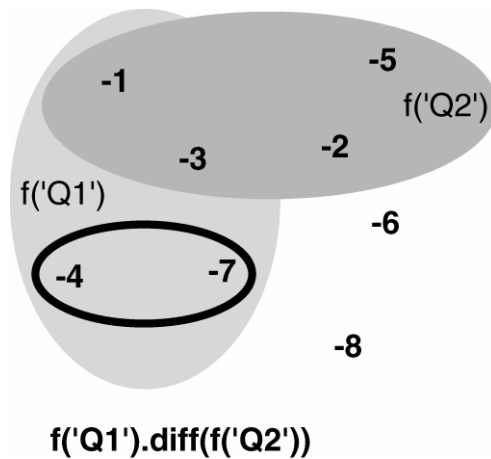
12.4.4 .isect()

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.



12.4.5 .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()`



Example: `f('qid').diff(set('1'))`

Here '1' is never included.

12.4.6 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 (see section 7.2 How to Add New Objects to the Questionnaire) as much as possible when using precode masks, because then you are sure that the precodes are exactly the same in the different questions.

12.5 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), just like when you make a condition. If this value is evaluated to 'true' the column is displayed, and otherwise if this value is evaluated to 'false' the column is not displayed. If you leave the field empty, the column is always displayed.

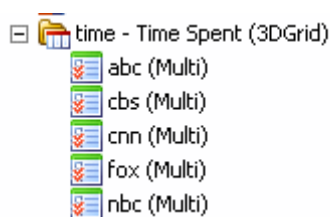


Figure 335: "time" 3d-grid

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

Multi Question - (q 14)

Masking

Column mask: `f('TVchannels').inc('1')`

General

Columns: 4

Keep position: ☐

Open text: ☒

Numeric: ☒

Total digits: 3

Decimal places: 1

Lower limit: 0

Lower limit type: $\geq$

Upper limit: 24

Upper limit type: $\leq$

Figure 336: 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:

Time spent

Please specify approximately how many hours you spent watching these TV channels last week.

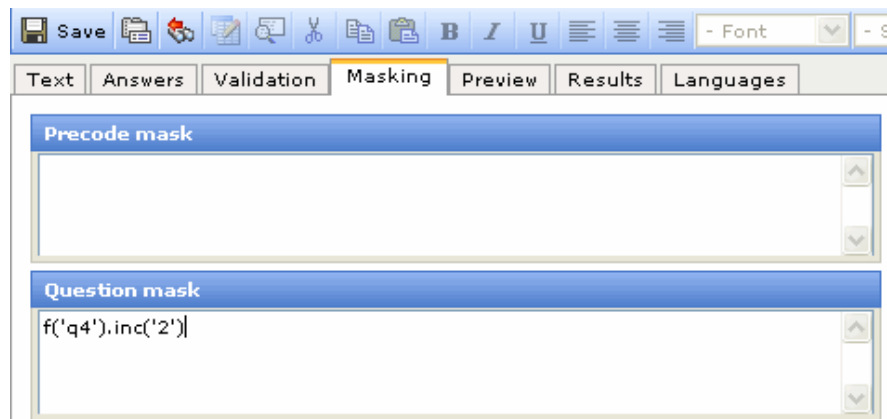
	ABC	CNN	NBC
Monday	1		
Tuesday	1.5	0.5	0.5
Wednesday			
Thursday		0.5	2
Friday	3		1.5
Saturday			
Sunday			

Figure 337: The "Time spent" question

12.6 Question Mask

Used to dynamically exclude and include questions in questionnaires. This functionality can also be used in Page objects (see section 7.2.11 Page). If you want to dynamically exclude a question, use this field to create a Javascript-expression that evaluates to a Boolean value (true or false), just like when you make 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, the following code should be written in the Question mask field of q7- Favorite: `f('q4').inc('2')`.



The screenshot shows a software interface with a toolbar at the top containing icons for Save, Undo, Redo, and various text formatting options (Bold, Italic, Underline, etc.). Below the toolbar are several tabs: Text, Answers, Validation, Masking (which is highlighted), Preview, Results, and Languages. The 'Masking' tab is active, showing two text input areas. The top area is labeled 'Precode mask' and is empty. The bottom area is labeled 'Question mask' and contains the text `f('q4').inc('2')`.

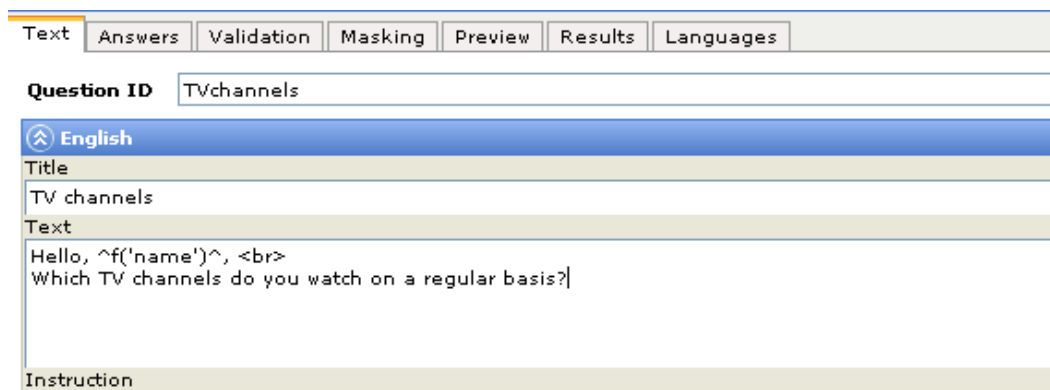
Figure 338: Question masking

12.7 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 from section 12.2.2.1 Multi, the code `^f("name")^` is inserted in the text field. This refers to the **name** question in section 12.2.1.2 Open Text.



The screenshot shows a software interface with a toolbar at the top containing icons for Save, Undo, Redo, and various text formatting options. Below the toolbar are several tabs: Text (which is highlighted), Answers, Validation, Masking, Preview, Results, and Languages. The 'Text' tab is active, showing a form for a question. The 'Question ID' field contains 'TVchannels'. The 'English' language is selected. The 'Title' field contains 'TV channels'. The 'Text' field contains the text 'Hello, ^f('name')^,
 Which TV channels do you watch on a regular basis?'. The 'Instruction' field is empty.

Figure 339: TVchannels

When displayed to the respondent, the question will look as show in Figure 340 (the name will be different of course).

TV channels

Hello, John Smith.
Which TV channels do you watch on a regular basis?

☒ ABC

☐ CBS

☒ CNN

☐ FOX

☒ NBC

☐ None of them

Figure 340: "TVchannels" question with text substitution

Question type	Returned from $\wedge f("qID")\wedge$
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 <code>qID_precode_other</code> (see section 7.2.3.10 Question Properties))
Loop	The text of the loop member corresponding to the iteration with precode <code>qID</code> in the current language.

Table 30: Texts returned from $\wedge f("qID")\wedge$ for different question types

Question type	Returned from $\wedge f("qID")["precode"]\wedge$
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.

Table 31: Texts returned from $\wedge f("qID")["precode"]\wedge$ for different question types

The same rules will apply to loop questions, but there you may need to specify iteration(s) as well (see section 12.2.3 Loops - $f("qID", "iteration\_precode", "iteration\_precode", \dots)$).

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.

This section describes the default validation rules and instructs you on 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 these types of built-in error checking:

1. Required answer testing.
2. Exclusivity checks.
3. Other-Specify verification.
4. Rank order testing.
5. Answer size tests for fixed-width fields.
6. Numeric response validation

If you do not like the default handling of 1–4, or prefer to use a less stringent quality scheme for the data you collect, each type of error handling can be turned off individually when generating WI (see chapter 14 Preparing for Data Collection). 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 (see section 7.2.3.10 Question Properties).

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 Confirmit Scripting Manual.

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 Confirmit Scripting Manual.

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.

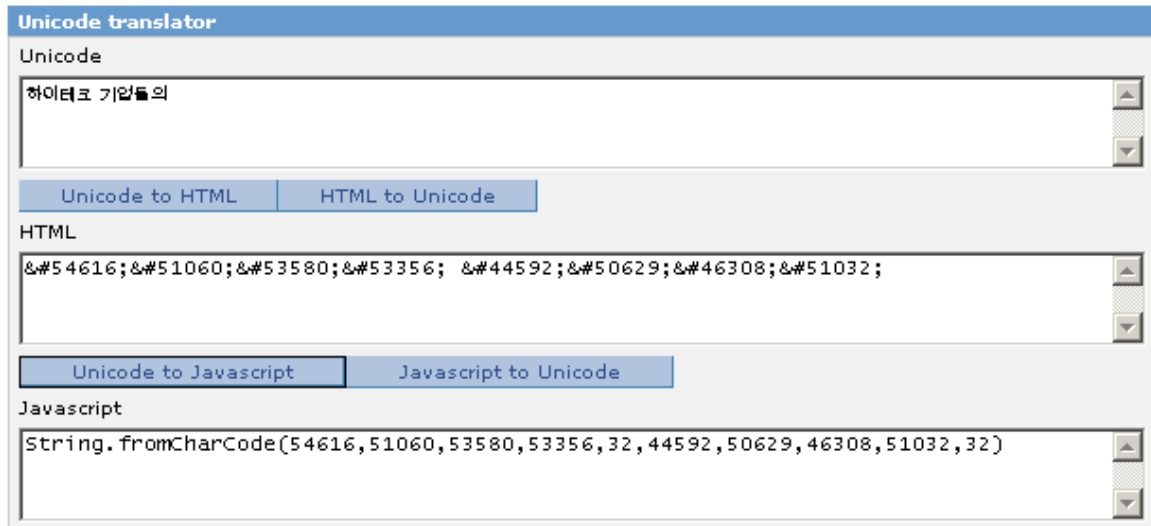


Figure 341: Unicode Translator

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 Confirmit Jscript 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;&#35211;&#12388;&#12369;! ");
}
```

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 skipping logic (conditions) and answerlist filtering (precode masks), 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 referring to invalid question ids when using the f function. (Syntactical errors in the script will be found when you create the interview files or through the "Check Script Code" functionality, see sections 13.3 Check Script Code and 14.2 Generating Interview Files).
- Identify logical errors in the questionnaire – for example groups of respondents that get wrong questions, questions that are never asked because of a wrong condition, answer that are never displayed because of errors in a precode mask etc.
- Make sure validation code works as expected.
- 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.

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 a Generation of Random Data

Select "Random Data Generator" under Designer->Quality Control.

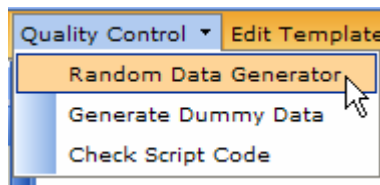


Figure 342: Random Data Generator

Random Data Generator is only available for the test database, so if test is not active, you have to change to test in the global switch at the bottom of the page.



Figure 343: Select test database

If you have made changes to the survey since your last generation of test database and interview files or if these have not been generated yet, you can select to do this as well. You can also select how many respondents to generate random responses for. There is a configurable limit per server installation for the number of respondents to generate random data for in one batch job, so the numbers available in the dropdown may differ from the figure below.

Active Database Test

Generate DB ☒ Create initial database ▼

Generate WI ☒ Edit Survey Settings

No of respondents 10 ▼

Generate

- 10
- 50
- 100
- 250
- 500
- 1000

Figure 344: Select number of responses

13.1.2 Runtime Script Errors

Runtime script errors will be listed in a pane at the bottom of the screen. These are errors that would get a live interview to abort with an error like this:

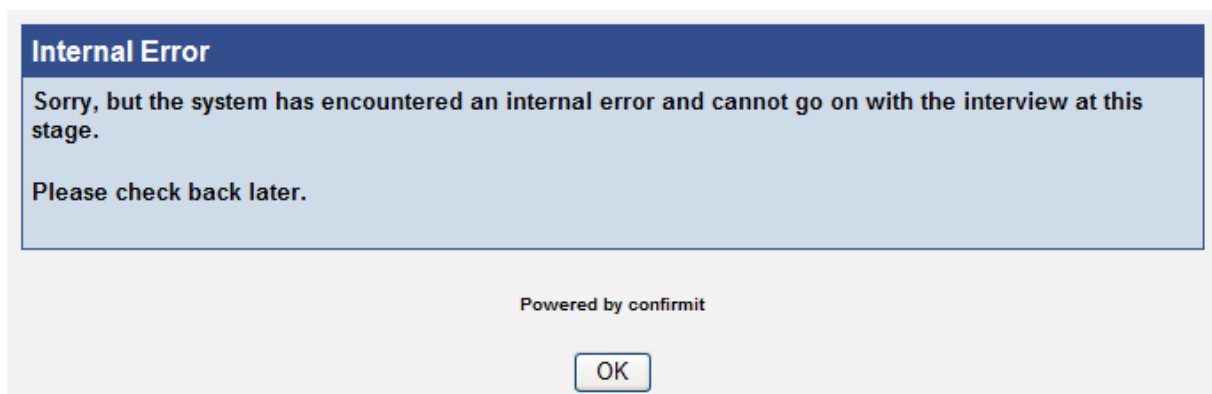


Figure 345: Internal Error

If a email address is set up in "Email address to receive emails triggered by scripting errors in interview" in "Survey settings", errors like this in production would also trigger an email with the error message to be sent.

The description of the error is clickable, and will open the actual question, condition or script node with the error when you click it. The full error description will be displayed as a tooltip if you point on it. Here is an example of such an error:

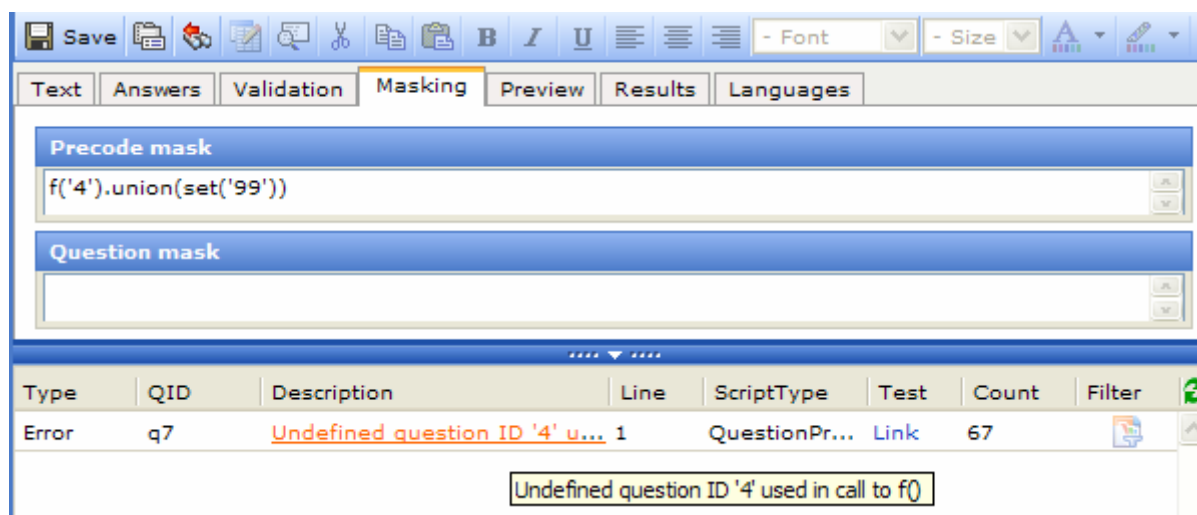


Figure 346: List of Errors

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.

You can click on "Link" to enter the survey for the first generated respondent that got the error, to see the responses.

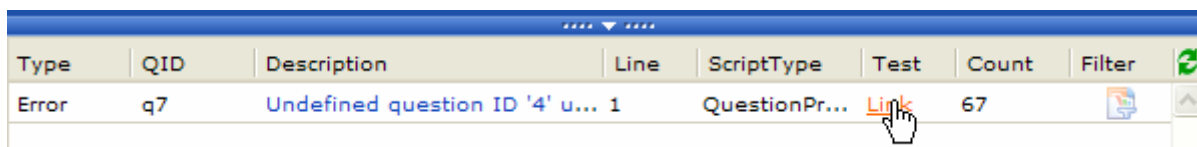


Figure 347: Link

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 that got the particular error.

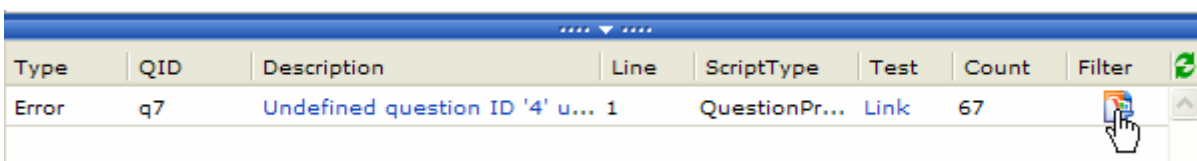


Figure 348: Filter

Active Database Test

Filtering

Advanced No active filter

[Edit...](#)

[Clear](#)

Rdg Respondents with script error in q7 line 1

[Clear](#)

Figure 349: Filter applied

Read more about the Rapid Results functionality in chapter 18

After making the correction you can select "launch survey" in test mode, update existing database and generate interview files again, and 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 (see chapter 18) or looking at the test results in Survey Data Editor (see section 25.2 Edit Survey Data).

Figure 350 shows an example of a user-defined validation that checks that the number of answers to a multi do not exceed 3:

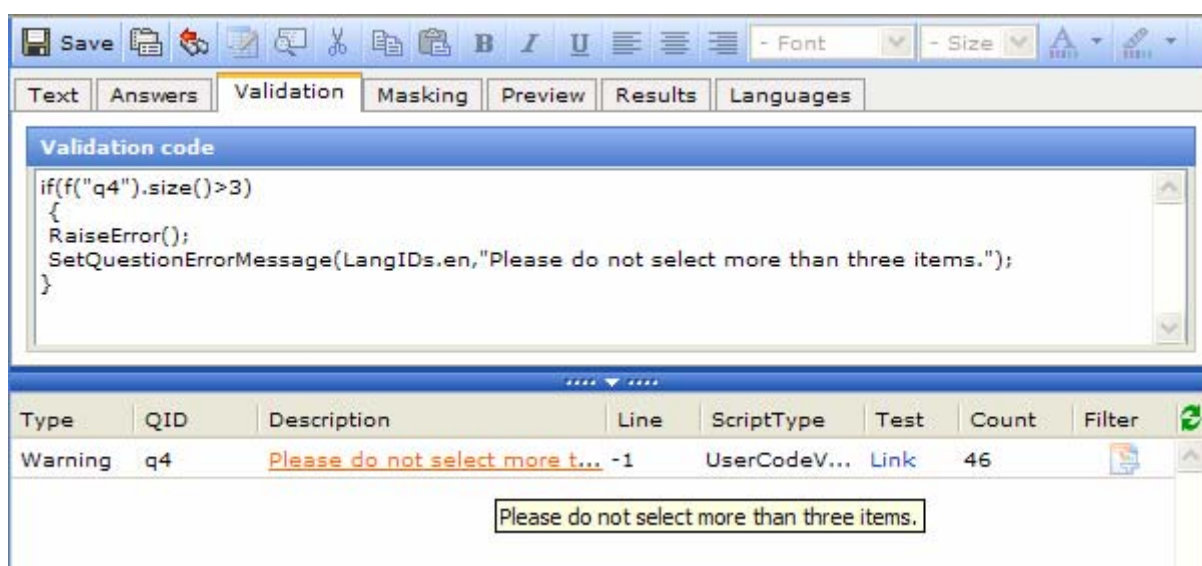


Figure 350: Warnings from User-Defined Validation

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 answerlist should be selected as a percentage.

In the example below, all respondents selecting "I do not watch TV" on q4 are screened.

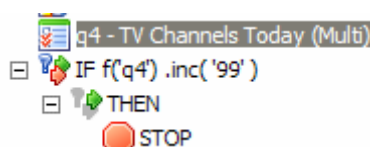


Figure 351: Questionnaire with Screening

To minimize the number of "Do not watch" responses, you can specify a low percentage in the RDG% column of the answer list:

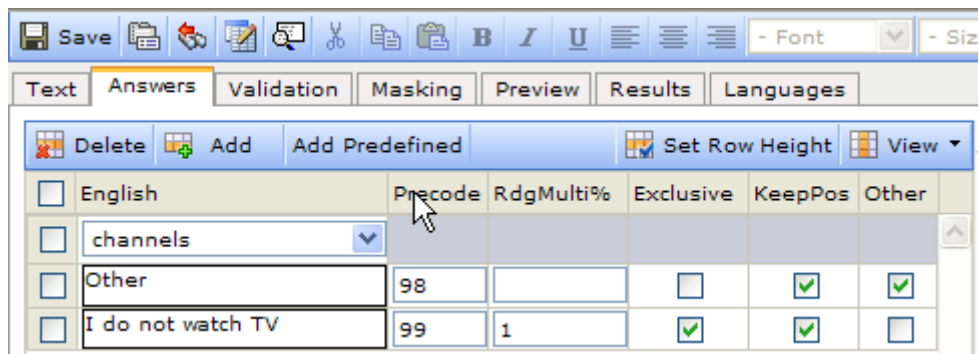


Figure 352: RDGMulti%

Similarly, there may be certain answers you want over-represented to ensure you get enough respondents through a branch of a condition etc. Then you can set a high RDG % number on these.

The RDG % numbers have to be integers from 0 to 100. It is not required to specify numbers for all items in the answer list. Items without a setting will get a value according to the remaining percentage, evenly distributed.

There is a difference between percentage settings for multi and single questions since multis can have several responses at once. So for a single question the percentages should add up to 100 in total, but for a multi they can add up 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.

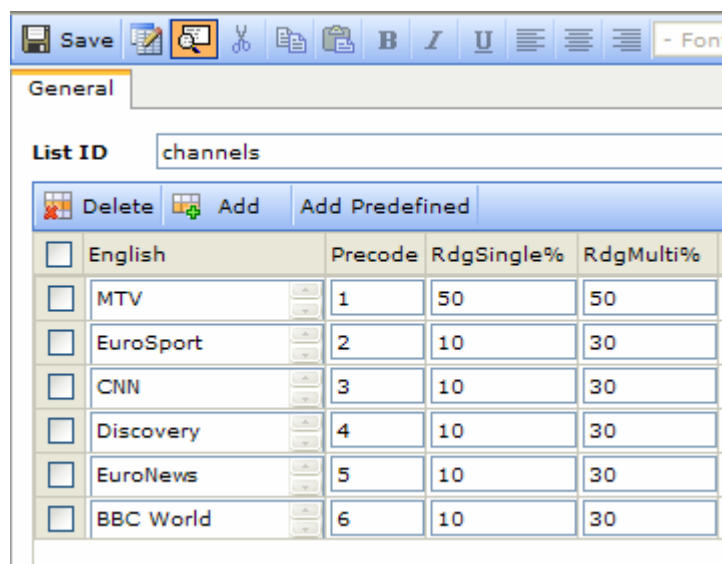


Figure 353: RdgSingle% and RdgMulti% in a Predefined Answerlist

Answerlists 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 answers percentage represents compared to the sum of the percentages of the answers actually displayed.

The responses will be picked so that when you look at the results the percentages will match 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 want to exclude when running the Random Data Generator. You can 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

You can generate dummy data in Test mode, for example, to test how to set up the reporting before going live with the survey. This will add 50 responses to all questions. Note that this data will not follow the logic and scripts of the survey. Use the Random Data Generator (see section 13.1) to generate test data that follows the survey logic.

13.3 Check Script Code

Check Script Code will go through your project checking for syntax errors in all 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, see section 13.1 Random Data Generator for more details.

You can access Check Script Code functionality in the Quality Control menu in Designer, or you can right-click the project folder in the Questionnaire tree toolbox and choose this option from the menu.

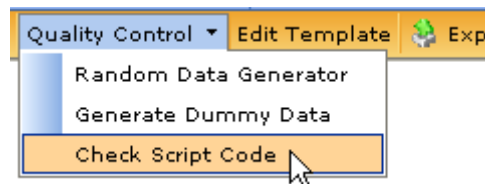
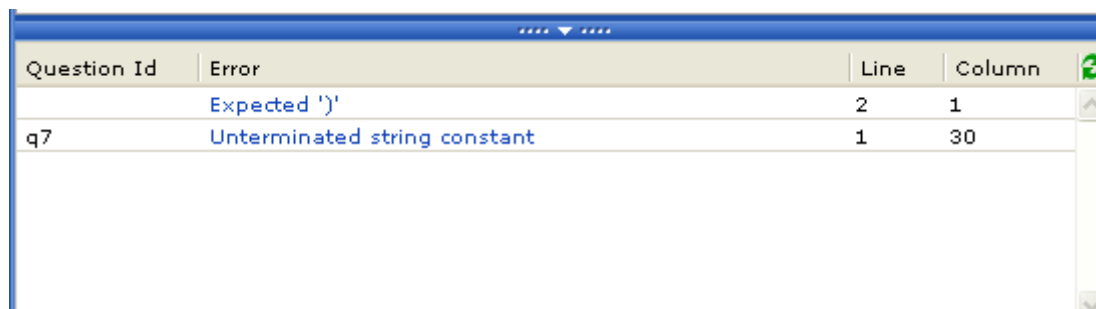


Figure 354: Checking script code

Confirmit will start running through the questionnaire and checking the coding. A new pane will be opened in the lower right part of Confirmit, saying "Please wait, loading list..."

Once the checking process is finished, a list of errors will be displayed in the pane:



Question Id	Error	Line	Column	
	Expected ')'	2	1	
q7	Unterminated string constant	1	30	

Figure 355: Error list

The Question ID column will display the question ID or the script ID where the error is located. The Error column will give a short summary of the type of error.

If you click the error link, the erroneous question, script, condition, etc., will be opened in the frame above the error pane. The erroneous question, script, condition, etc., will be highlighted in the questionnaire.

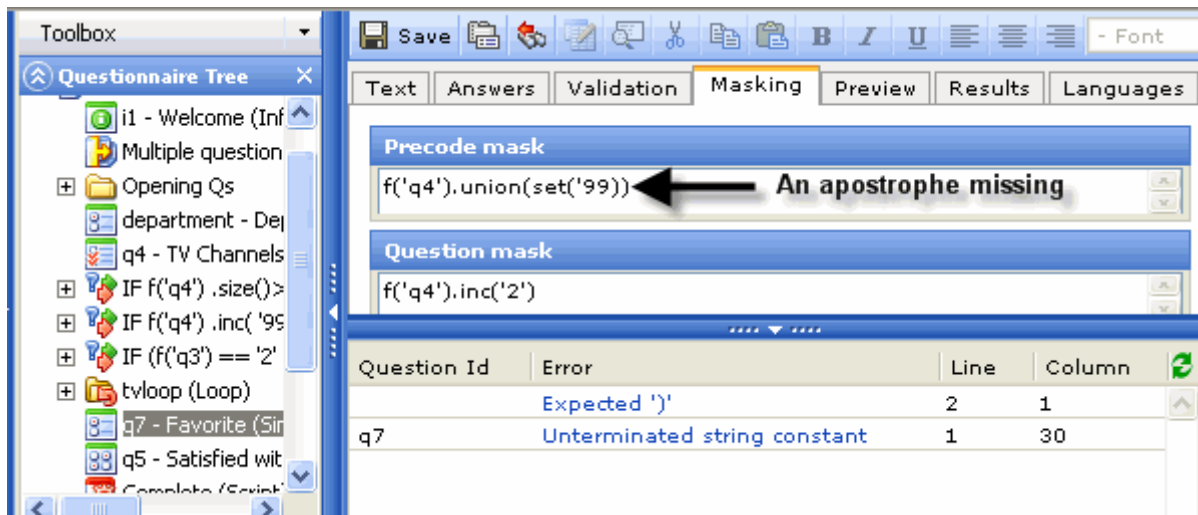


Figure 356: Opened error

You can 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 answerlist when not in a 3D Grid
- the property Dropdown cannot be set when in a 3D Grid
- Multi questions:
- must include answers in the answerlist when not in a 3D Grid
- Grid questions:
- must include answers in the answerlist when not in a 3D Grid
- must include scale
- 3D grid:
- must include answers in the answerlist
- 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 answerlist 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 code again. This time the system will find the precode mask error. You will 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 (see section 13.1). 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.

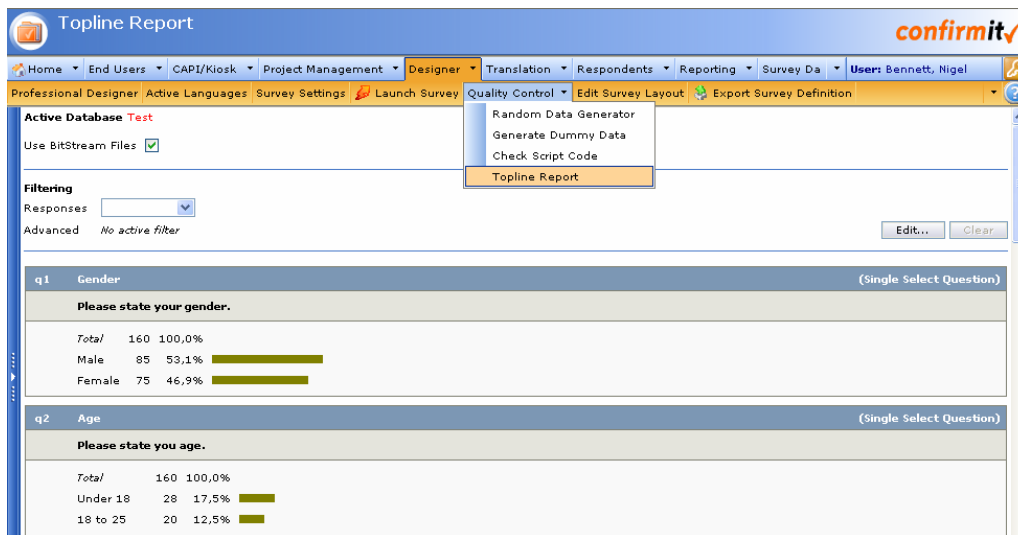


Figure 357: Topline report

You can filter the Topline reports on the response status (Complete, Incomplete, Quota full, Error, Screened). When opened, the report will by default display all responses. You can also filter data on specific questions. See chapter 19 Advanced Filter Designer.

The following picture displayed a report that has been filtered on the Age question. The filter expression will be displayed next to Filtering.

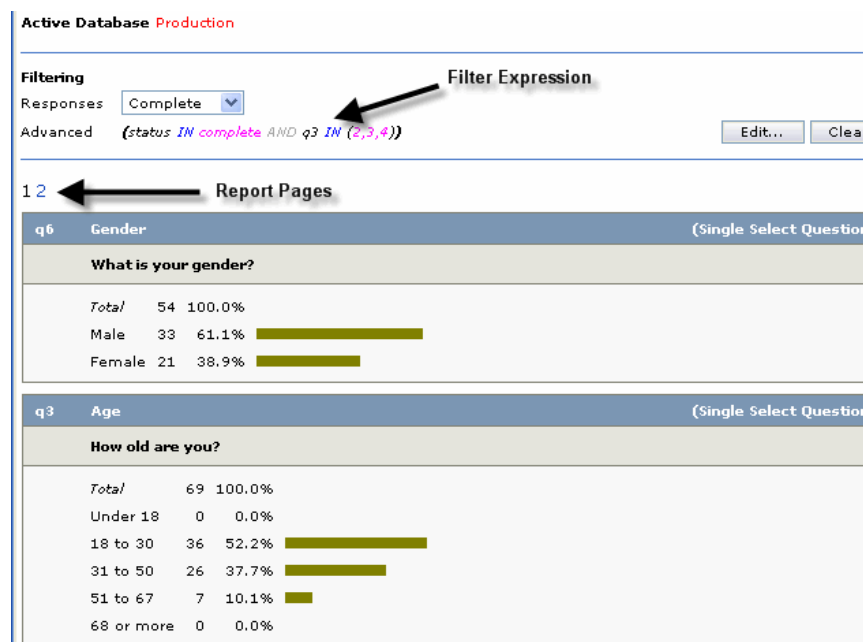


Figure 358: Filtered topline report

If your survey is long, and the topline report cannot be displayed on one page, the next pages can be accessed 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.

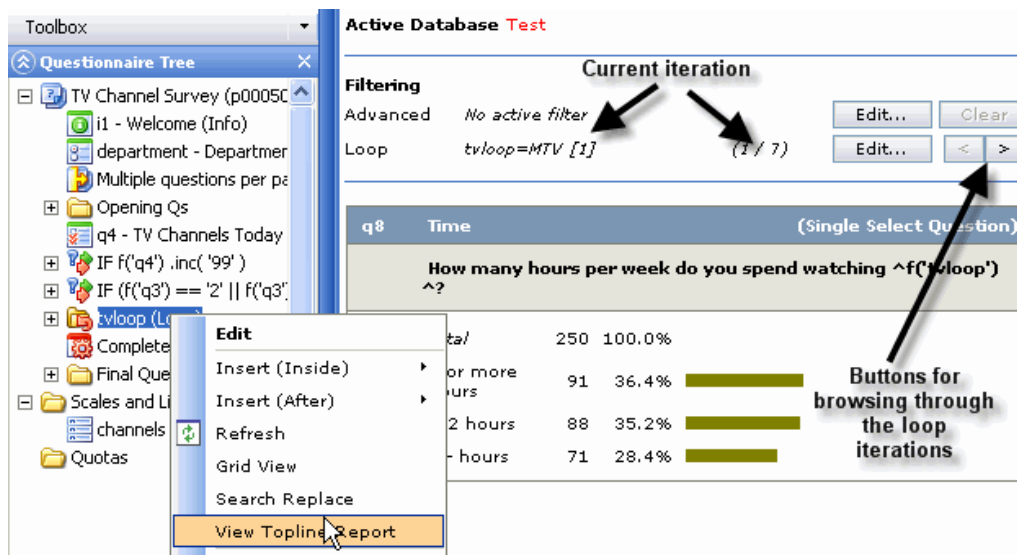


Figure 359: Topline report for loop

13.5 Quick Test in Professional Designer

In Professional designer, you can now 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.

In the questionnaire tree, right-click on the project folder or on the question from which you want to start the test. From the menu, select "Quick Test", and the interview will open on the right hand side.

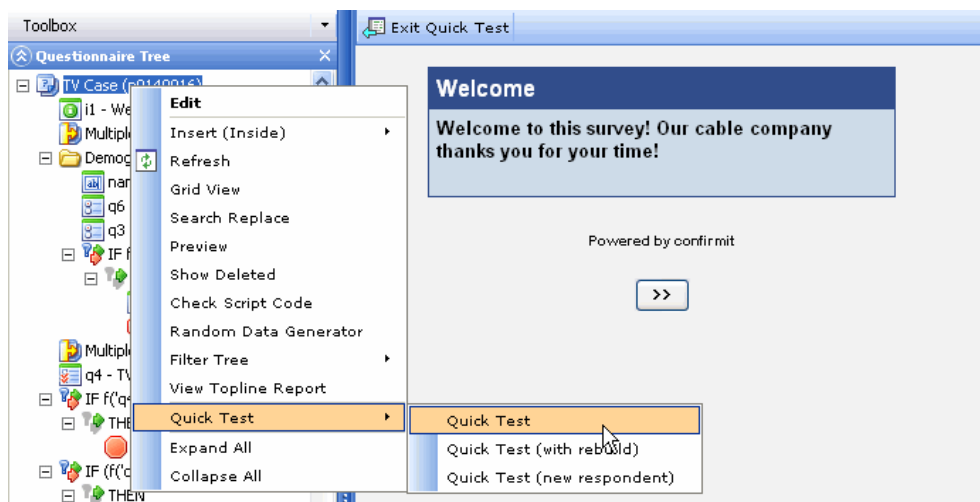


Figure 360: Entering quick test

You can then test the interview, going backwards and forwards, depending on your Survey settings, in the questionnaire like in a live survey. You can also double-click questions in the tree to skip directly to them. When finished, in order to exit the quick test mode, you can click "Exit Quick Test".

Your responses will be kept in the current session. This means that when you reenter the Quick test in the same session, the responses will still be there. If you make changes in the questionnaire, you can simply 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)" in the Quick test menu.

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. The External Quick Test does not generate or store data in a database; it uses memory for the current session.

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, relaunch 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 Figure 361 appears.

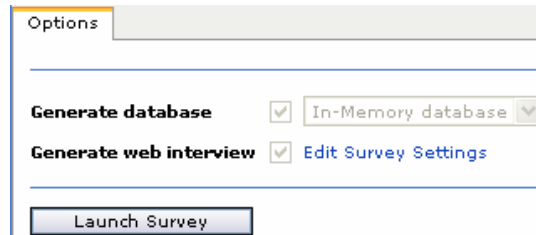


Figure 361: The Launch External Quick Test page

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 (ringed in Figure 362 below).

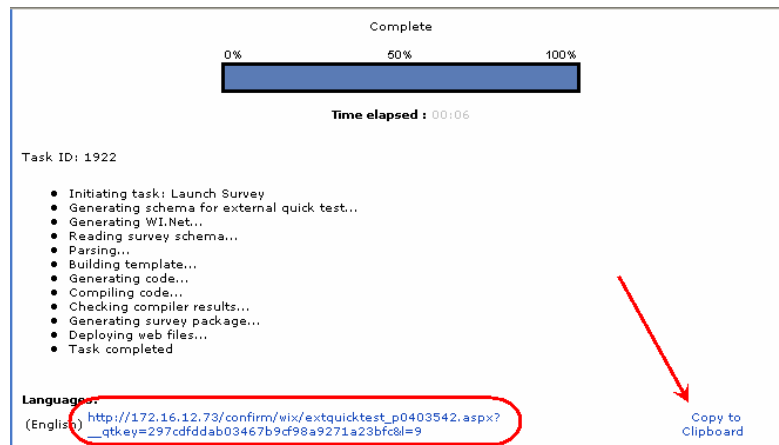


Figure 362: The Task page with the test link

3. Click **Copy to Clipboard** (arrowed above), then create an email and paste the link into it. Send the email to the testers.

14 Preparing for Data Collection

14.1 Generating Response Databases

When you have finished constructing your questionnaire and you want to test it, you must first prepare a response database. Every time you make changes in the questionnaire, you must update the response database. This process is called compilation.

Note: The system keeps two separate databases for your survey, one test database, and one production database. To switch between databases, use the Database dropdown in the lower right corner of the window.

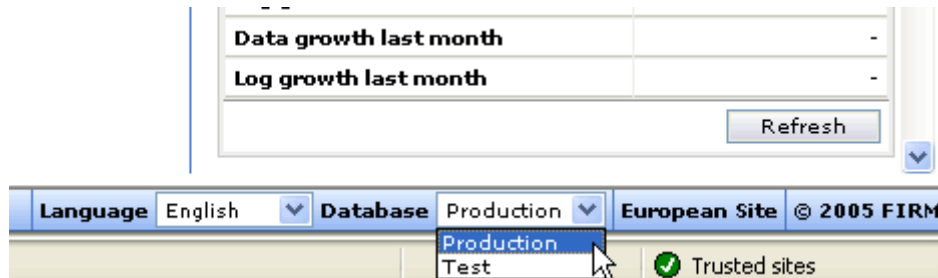


Figure 363: Global database switch

To generate the databases, click **Launch Survey**:

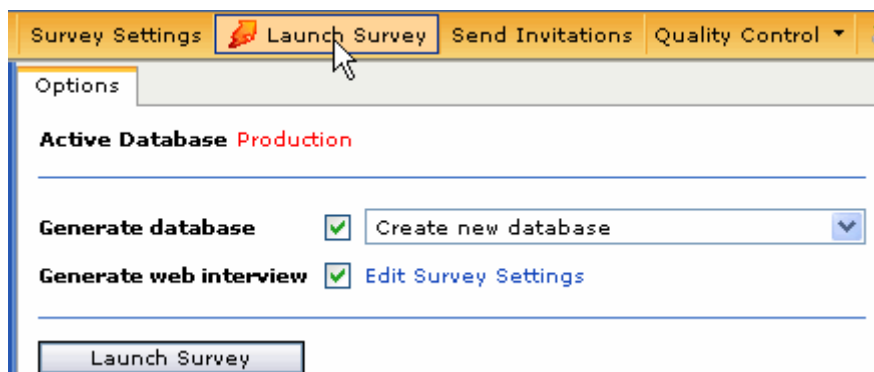


Figure 364: Launch Survey

The active database will be indicated at the top of the page. In Launch Survey you can Compile the database and Generate the WI (see section 14.2 Generating Interview Files) in one operation.

When you compile the database for the first time, you are presented with a dropdown 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, (See section 7.2.3.3).

- if the precodes contain illegal characters. Precodes can only contain alphanumeric characters, and underscore (_), with no white space. The maximum length is 32 characters. (See section 7.2.3.3).
- 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 (See APPENDIX C: RESERVED KEYWORDS) are used as question Ids.

The check will also control if the questionnaire has any questions with empty answers, or illegal properties. See also chapter 13 Quality Control.

Single questions:

- must include answers in the answerlist when not in a 3D Grid
- the property Dropdown cannot be set when in a 3D Grid
- Multi questions:
- must include answers in the answerlist when not in a 3D Grid
- Grid questions:
- must include answers in the answerlist when not in a 3D Grid
- must include scale
- 3D grid:
- must include answers in the answerlist
- must include questions

If the database already exists because of a previous compilation, you are presented with a slightly different dropdown dialog.

The system will also run through all conditions, scripts, and codes, and locate all syntax errors. See chapter 13 above Quality Control.

Active Database Production

Generate database ☒ Create new database

Generate web interview ☐ Update existing database (incremental)

Update existing database (rebuild)

Create new database

Launch Survey

Figure 365: Database Compilation Dropdown

The options 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 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.

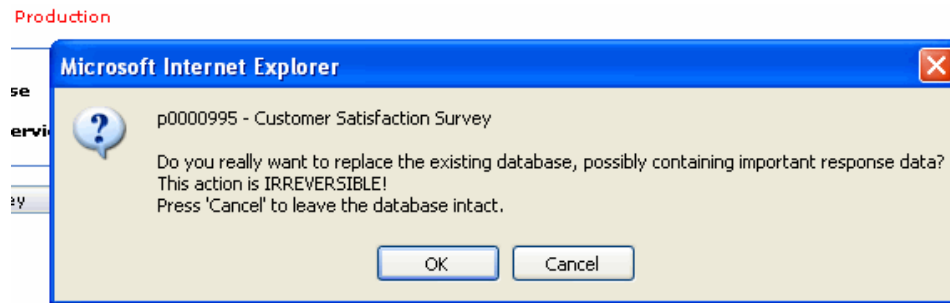


Figure 366: Create New Database Warning.

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: This 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.

14.2 Generating Interview Files

Before you can start interviewing, you must have generated a production response database as described above.

Note: As of Q2 2004 all new development on the survey end has been based on the new Survey Engine. The previous version of the survey engine is removed from Confirmit, starting with Confirmit 10, October 2005 release.

14.2.1 Survey Engine in Confirmit

A new Survey Engine was introduced in Confirmit 8.5, setting a new standard for stability, performance, capacity and user efficiency. Key benefits for users are:

- Increased scalability and performance
- Great reduction in WI generation time leads to less waiting
- Greatly reduced time in tracing script errors
- For On Premise clients: Better usage of existing server infrastructure

Confirmit Survey Engine, running on .NET, is significantly faster and more scalable than the previous version, Confirmit 8.1 Survey Engine that has been terminated in Confirmit 10. As the Survey Engine provides higher throughput than before, the immediate effect is that the survey collection capacity will increase dramatically for any existing server infrastructure.

Other important improvements have been made in the generation and deployment system. The immediate benefits for Confirmit users are much faster Web Interview (WI) generation (up to 25 times faster), quicker deployment of survey files (respondent pages displayed faster), and improved compile-time script checking (the system more precisely defines where there are errors).

The new survey engine uses JScript.NET as scripting language, whereas the previous engine used JScript. This means that Confirmit users may have to modify scripts in surveys that were built on the previous engine. The differences between JScript and JScript.NET are described in the Confirmit Scripting Manual. It is highly recommended that you test your survey in test mode before generating WI files using the new survey engine.

If a survey has been running on the previous engine, you may have distributed links (for example by email) similar to this:

<http://survey.confirmit.com/wi/pXXXXXXXXX/i.asp?....>

The new survey engine will have urls like this:

<http://survey.confirmit.com/wix/pXXXXXXXXX.asp?....>

To make sure that respondents who have been given the links generated on the previous engine still can access the questionnaire through those links, an automatic redirect will be done from the old to the new when an interview previously running on the old engine is generated with the new engine.

14.2.2 Web Interview Files

The web interview generator produces a file capable of:

- Displaying forms for user input over the web,
- Storing the respondent's answers, and
- Controlling questionnaire flow based on background data (if available) and answers received.

A description of the available options is provided below.

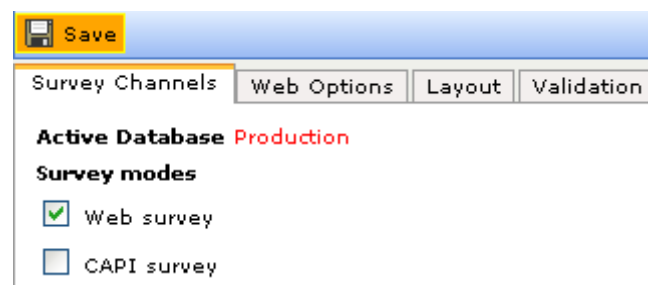
The URL to an open survey will always be <http://survey.confirmit.com/wix/pXXXXXXXX.aspx> or <https://survey.confirmit.com/wix/pXXXXXXXX.aspx> if you have obtained a SSL secure certificate on your server and choose to run the survey from a secure site. (pXXXXXXXX is the project number).

Login only: The URL to the survey will always be <http://survey.confirmit.com/wix/pXXXXXXXX.aspx> or <https://survey.confirmit.com/wix/pXXXXXXXX.aspx> if you choose to run the survey from a secure site.

14.2.3 Survey Settings

Before you generate the interview files, you must define the survey settings for the survey behaviour, layout, and validation.

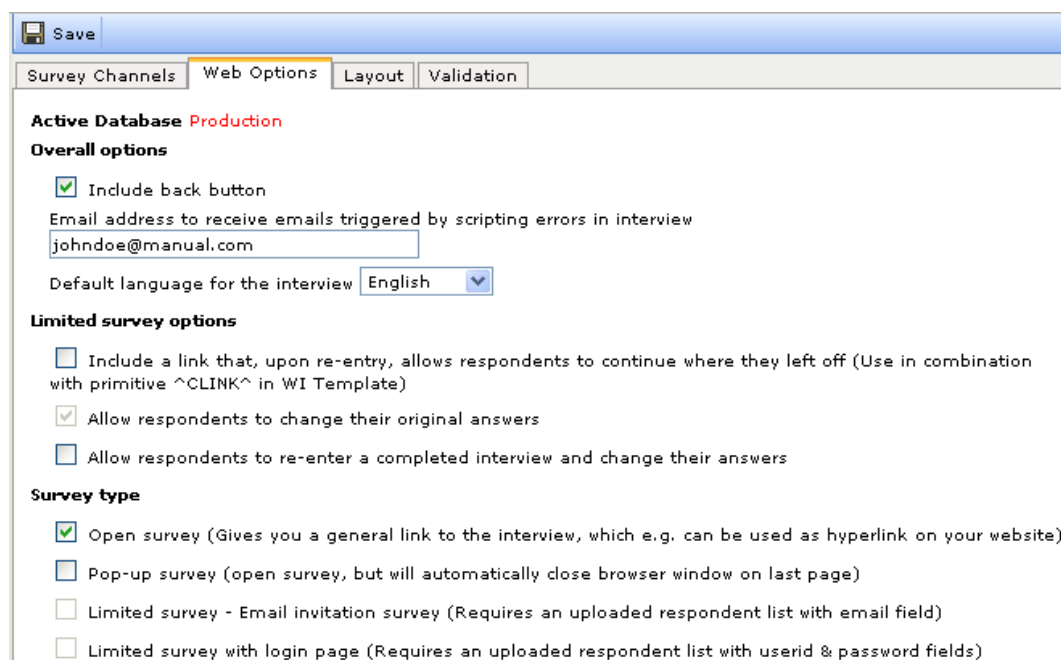
When you enter the Survey Settings, in the Survey Channels page, you can define if the survey will be a Web survey, CAPI survey (an Add-on, see separate manual for more information), or both types.



The screenshot shows a software window titled 'Save' with a blue header bar. Below the header is a tabbed interface with four tabs: 'Survey Channels' (selected), 'Web Options', 'Layout', and 'Validation'. Under the 'Survey Channels' tab, the text 'Active Database Production' is displayed in red. Below this, the section 'Survey modes' contains two options: 'Web survey' with a checked checkbox and 'CAPI survey' with an unchecked checkbox.

Figure 367: Survey Channels

In Web Options, you define the overall options, survey type, and survey options for the survey.



The screenshot shows a software window titled 'Save' with a blue header bar. Below the header is a tabbed interface with four tabs: 'Survey Channels', 'Web Options' (selected), 'Layout', and 'Validation'. Under the 'Web Options' tab, the text 'Active Database Production' is displayed in red. Below this, the section 'Overall options' contains three items: a checked checkbox for 'Include back button', a text field for 'Email address to receive emails triggered by scripting errors in interview' containing 'johndoe@manual.com', and a dropdown menu for 'Default language for the interview' set to 'English'. Below this, the section 'Limited survey options' contains three checkboxes: 'Include a link that, upon re-entry, allows respondents to continue where they left off (Use in combination with primitive ^CLINK^ in WI Template)' (unchecked), 'Allow respondents to change their original answers' (checked), and 'Allow respondents to re-enter a completed interview and change their answers' (unchecked). Finally, the section 'Survey type' contains four checkboxes: 'Open survey (Gives you a general link to the interview, which e.g. can be used as hyperlink on your website)' (checked), 'Pop-up survey (open survey, but will automatically close browser window on last page)' (unchecked), 'Limited survey - Email invitation survey (Requires an uploaded respondent list with email field)' (unchecked), and 'Limited survey with login page (Requires an uploaded respondent list with userid & password fields)' (unchecked).

Figure 368: Web Interview Generator Web options

In Layout, you choose the look and feel of the survey.

The screenshot shows the 'Layout' tab of a configuration window. At the top, there's a 'Save' button and tabs for 'Survey Channels', 'Web Options', 'Layout', and 'Validation'. The 'Active Database' is set to 'Production'. Under 'Overall options', there's a dropdown for 'Web Interview Template to use' set to 'confirmit default (blue)', and checkboxes for 'Use Survey Layout', 'Include progress bar', and 'Reserve a fixed area for validation error messages on every page of interview'. The 'Survey Layout to use' dropdown is empty. Under 'Accessibility options', there are checkboxes for 'Generate section 508 accessibility compliant code', 'Generate 'Error: '-prefix for error messages', and 'Insert label for 'Other'-inputs'. Under 'Button options', 'Customize navigation buttons' is checked, with a 'Type' dropdown set to 'Button' and an empty 'Style' field. Below this is a table for 'Button texts' with columns for 'Next', 'Back', and 'OK', and rows for 'English' and 'Norwegian'. Under 'Global button images', it's checked, with a table for 'Image URLs' for 'Radiobuttons' and 'Checkboxes' with rows for 'Default', 'MouseOver', and 'Selected', and input fields for 'Width' and 'Height'. Finally, under 'Click options', there are checkboxes for 'Cell-area click for grid', 'Label click for single and multi (select by clicking answer text)', and 'Auto-next (proceed to next page automatically when possible)'.

Figure 369: Survey Layout Options

The screenshot shows the 'Validation' tab of the same configuration window. It has the same top navigation and 'Active Database' as Figure 369. Under 'Default validations', there are four checked items: 'Answer required checks: Answers are required for Singles/Open texts/Grids', 'Exclusivity tests: Disallow other answers when SINGLE answer has been selected in a Multi', 'Other-Specify checking: Check that BOTH checkbox and textbox have been completed for an Other-specify answer', and 'Rank order tests: Check that ranking questions have all necessary answers without duplicates'.

Figure 370: Validation

In Test mode, after having generated a web interview, you are presented a link, for example English, to the test survey.

Clicking the link will open the survey tree and the survey with the respondent layout. Open the survey tree structure by right-clicking the survey folder and choosing Expand tree from the menu.

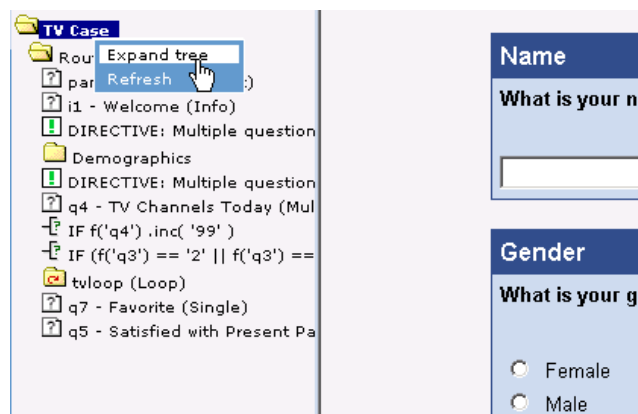


Figure 371: Expand tree in Test Mode

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 the questions representing background variables and panel variables will be visible in the Test survey, and will have to be answered (see section 15.1.1 Use of Background Variables).

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.

14.2.4 Web Options

14.2.4.1 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.

14.2.4.2 Email Address to Receive Emails Triggered by Scripting Errors in Interview

Use this field to specify the email address to which you wish survey error notifications to be sent.

If an error should occur in the survey, the respondent will receive a general error message in the language he/she has selected for the survey, for example:

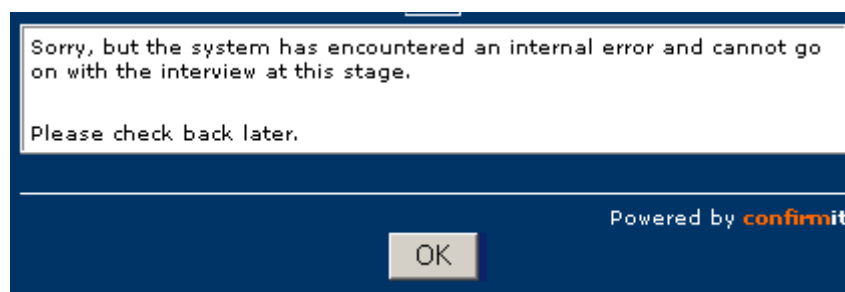


Figure 372: Error Message

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.

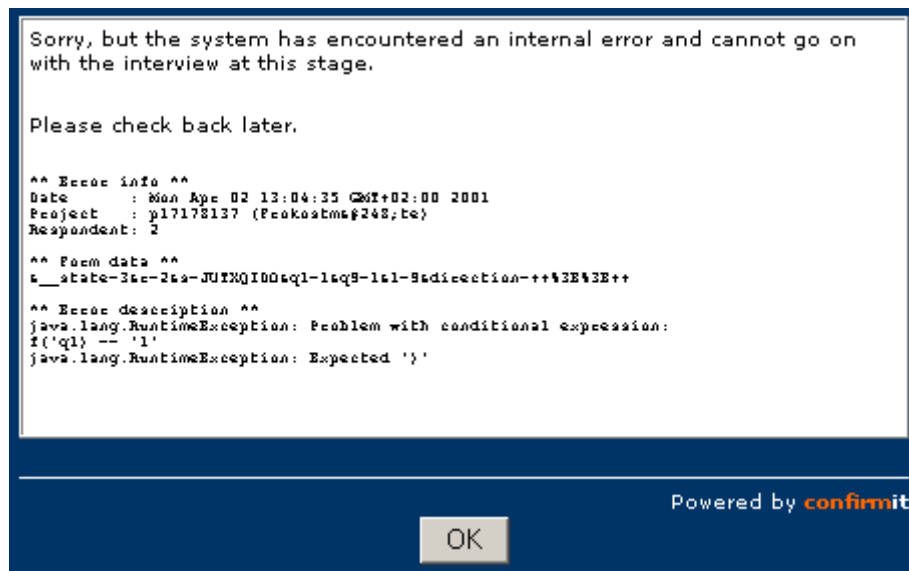


Figure 373: Test Mode Error Message

14.2.4.3 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.

14.2.4.4 Include a link that, upon re-entry...

This feature applies to Limited Surveys with the option Generate Back Button selected, and must be used in combination with the WI Template primitive ^CLINK^ (see section 4.11 Templates) 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.

14.2.4.5 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.

14.2.4.6 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.

14.2.4.7 Survey Type

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.

When you do not choose the option Limited survey 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.

14.2.4.7.1 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.

14.2.4.7.2 Pop-up Survey

Normally, an interview is ended by displaying a "Thank you" box that brings the user to a specified page when the OK button is pressed. Choosing this option alters the behavior of the generated interview to close the browser window when the interview is complete, i.e. no "Thank you" page will be displayed.

14.2.4.7.3 Limited Survey – Email invitation survey

Each respondent may automatically be provided with a unique link to the survey, which includes identification credentials.

A cryptic link to the survey will for example look like this:

<http://survey.confirmit.com/wix/pXXXXXXXX.aspx?r=112&s=VDDNCVPK&l=9> or

<https://survey.confirmit.com/wix/pXXXXXXXX.aspx?r=112&s=VDDNCVPK&l=9> if you choose to run the survey from a secure site.

r= sequential respondent number assigned by the system

s= randomly generated 8 digit code. Uniquely produced for each and one

respondent. This means that there are 26^8 alternatives. L = the language in which the respondent receives the survey.

14.2.4.7.4 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. See section 15.1 Preparing the Respondent List.

Note: When sending emails to respondents, do not choose Include link option, but paste in the general open link to the survey. See section 14.2 Generating Interview Files.

14.2.4.7.5 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.

14.2.4.7.6 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.

14.2.5 Layout

14.2.5.1 Web Interview Template to Use

In this field you may choose among WI templates you have predefined (see section 4.11 Templates) and apply them to your project.

14.2.5.2 Use Survey Layout

When you choose this option, you will be able to choose a survey layout from the dropdown and apply it to your survey. 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/>

14.2.5.3 Include Progress Bar

This option instructs the generator to include a progress bar on the interview pages. This bar shows the respondent how much of the questionnaire is remaining (in percentage). The percentage calculation is based on the entire questionnaire, i.e. all questions in the survey. This means that if you have extensive routing in the questionnaire, the progress bar will jump in accordance with how many questions that were not asked a particular respondent. Thus, the progress bar can sometimes be misleading to respondents.

14.2.5.4 Reserve a Fixed Area for Validation Error Messages on Every Page of Interview

Select this option if you wish to reserve a small fixed area for page error messages. This prevents the rest of the page from jumping up and down if the interview program displays an error message. Because this area consumes space, you may want to uncheck this option, especially if you are creating a pop-up survey where the window size is limited.

14.2.5.5 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.

14.2.5.6 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.

14.2.5.7 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.

14.2.5.8 Button Options

14.2.5.8.1 Customize Navigation Buttons

This feature will give the survey author complete control of the look and feel of the *next* and *back* buttons in the survey. The user will also be able to set the style attribute for the button or image, and thereby be able to set color, borders, text color, position etc. in HTML.

The user can choose to use either buttons or images for navigation.

If the user selects Button from the Type dropdown, he/she will be able to enter the texts of the buttons in the textboxes.

If the user selects Image from the Type dropdown, he/she will be able to enter the image URLs in the textboxes. The survey author can set the 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* is switched on.

14.2.5.8.2 Global button images

This feature enables the user to specify three image URLs that will replace the ordinary radio buttons and checkboxes. See also section 7.2.3.10 Question Properties.

14.2.5.9 Click Options

14.2.5.9.1 Cell – area click for grid

This feature enables the respondent to click the cell area around the radio button in 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.

14.2.5.9.2 Label click for single and multi (select by clicking answer text)

This feature will enable the respondent to click the labels of as well as the checkboxes/radio buttons for single and multi questions.

14.2.5.9.3 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 be active for grid questions as well.

14.2.6 Validations

14.2.6.1 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.

14.2.6.2 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.

14.2.6.3 Other-Specify Testing

The generator produces code that confirms the consistency of user input, i.e. that the respondent does both, checks off for Other and writes in the text box, - and vice versa.

14.2.6.4 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 (see section 7.2.3.10 Question Properties). See also section 12.8 Validation Code.

14.2.7 XSS – Cross Site Scripting

These survey settings will safe-guard Confiormit 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 Confiormit 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.

14.2.7.1 HTML Encode Output of Piping Expressions

Expressions in response piping will be encoded so the code is not executed.

14.2.7.2 Require all Open Text Input to be XSS Safe

Will validate the input from the respondents and not accept input containing < and >.

14.2.8 An Example of a Script for Pop-up Surveys

If you want to do a pop-up on a website, a script will have to be included in the code of the page where you want the pop-up to be opened from. There are many different solutions for this, depending on when you want the pop-up to come up 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.yourconfiormitserver.com/wix/pXXXXXXX.aspx",
"windowname",
"toolbar=no,location=no,directories=no,status=no,menubar=no,resizable=yes,copyhistory=no,sc
rollbars=yes,height=360,width=300")
    }
} </script>
```

Change pXXXXXXX to the actual project number.

The script first checks if the respondent has a cookie already (then he/she has already gotten 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: 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 - allow the window to have or not have a toolbar.

location=no - allow the window to display its location or not.

directories=no - allow the window to display directory buttons or not.

status=no - allow the window to have a status bar at the bottom or not.

menubar=no - allow the window to display a menu bar or not.

resizable=yes - make the window resizable, borders are draggable.

copyhistory=no - allow for tracking of links activates the back or forward buttons.

scrollbars=yes - automatically include scrollbars on the window if needed.

height=360 - height of the window in pixels.

width=300 - width of the window in pixels

14.2.8.1.1 Pop-up Script Wizard

In Test mode, after having generated a web interview, you are presented a link, for example English, to the test survey. When you enter the link to a survey that has been generated as a Pop-up, you will immediately be presented with a Pop-up Script Wizard. The Wizard includes an example of a Pop-up script, very similar to the one included in section 14.2.8 An Example of a Script for Pop-up Surveys, as well as it gives the user an opportunity to adjust several of the Pop-up parameters: window appearance, display frequency, and cookie.

Pop-up Script Wizard

A script similar to the one displayed below must be included on the Web page where you want to trigger the pop-up. Follow this procedure:

1. Tweak the parameters until you are pleased with the appearance of the preview window and save them for future reference.
2. Add the below script to the HTML source of the triggering page.

Note: The scrollbar property of the preview window cannot be set dynamically. Because of this, changes to the scrollbar property will not take effect until the next time you test your pop-up.

Parameters

Window appearance:
Width: Height: Scrollbars: ☒

Display frequency:
Show pop-up to every th respondent

Cookie:
Name: , expires in months

Script

```
<script><!--  
if (document.cookie.indexOf("FIRMp0107973=true")==-1)  
{  
    document.cookie  
        = "FIRMp0107973=true;path=/;Expires=Thu, 29 May 2003 23:00:00 UTC";  
}
```

Figure 374: Pop-up Script Wizard

The changes you make to the Pop-up script will be applied the next time you generate web interview in the Test mode.

15 Handling Respondents in Limited Surveys

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. Section 15.4 Sending E-mail 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.

Make sure that the spelling is exactly the same as in the table below.

Column name	Description	Limited WI
name	The full name of the respondent	opt
language (for multilingual projects)	The respondent's preferred language. The survey will be presented in this language (see appendix for language codes)	opt
email	The respondent's e-mail address	Req: if the survey will be sent to respondents via Confirmit
userid	The respondent's userid if logon is required	opt
password	The respondent's password if logon is required	opt

req = required opt = optional

Table 32: Fields in respondent lists

In addition to these columns, any background variables defined for the survey must be represented as columns in the respondent data file. **The column names for these background variables must exactly match the form IDs given to these background variables in the questionnaire designer. See section 7.2.3.10 Question Properties.**

15.1.1 Use of Background Variables

In the respondent list you can include all 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 name, email, the question type to be included in the questionnaire is Open Text question.

If the information can be categorized, i.e. if several respondents belong to each category, for example department, country, language, the question type to be included in the questionnaire is Single question

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 question.

For example you have the following information about your respondents:

Email

Department (Administration, Marketing, Support, Sales)

Visited websites (confirmit.com, altavista.com, yahoo.com, lycos.com)

A respondent can have one email address, belongs 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 will then have to 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 (See APPENDIX C: RESERVED KEYWORDS) as column headers in respondent lists. The system will however perform a check during the upload process, and generate an error message.

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. The Upload Settings dialog opens.

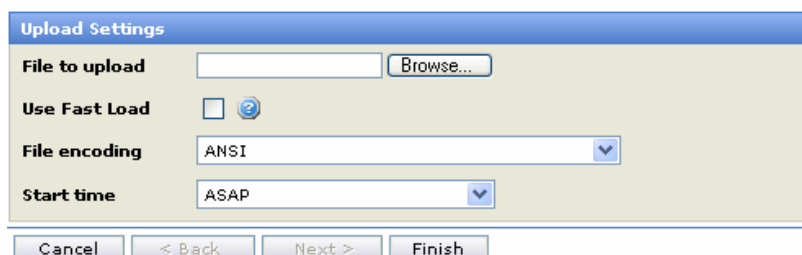


Figure 375: The Upload Settings dialog

2. Click **Browse**, then find and select the required respondent data file.
3. 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.

4. In the **File Encoding** dropdown 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.

5. 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. This dialog enables you to set up the date and time for when you wish the upload to commence. See section for more information on the Recurrence Pattern dialog.

6. 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. See section 1.4.3 Data Transfer Encryption and FTP.

To transfer respondent data in a secure way, the Confirmit user will have to encrypt the respondent file using Confirmit Company's public encryption key and then upload the file to Confirmit Company's FTP server.

The Confirmit user will enter the project, go to Respondents > Upload, and choose the option Pick up file from FTP server.

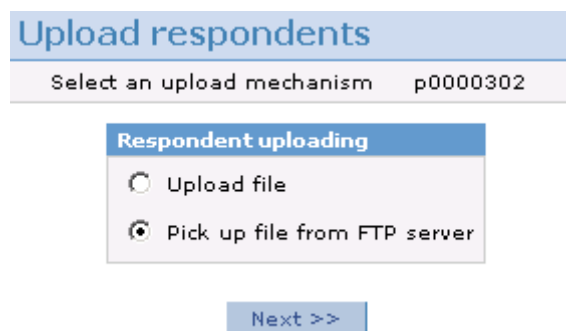


Figure 376: Pick up file from FTP server

Confirmit will then pick up this file, decrypt the file with the user's private encryption key, and then upload the respondents into the specified project.

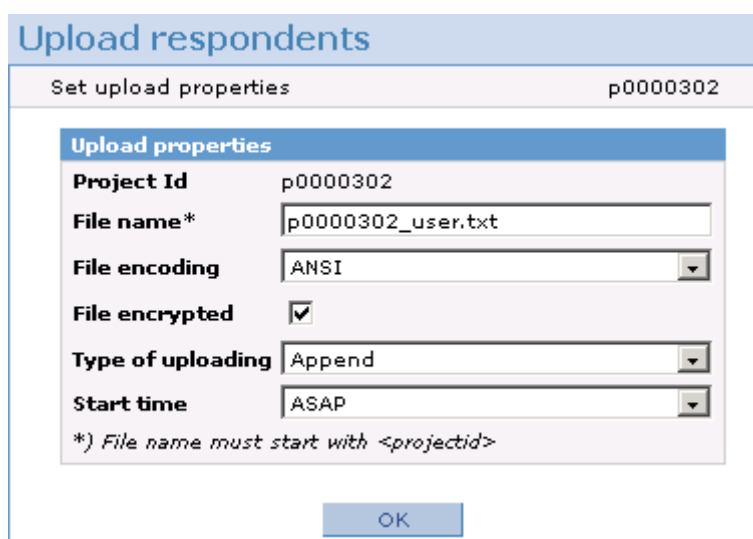


Figure 377: Upload respondents properties

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 does include all information uploaded in the respondent file and also some system generated fields. The respondent editor is linked to the Emailing Report functionality (see section 15.4.6 Email Delivery Report), and changes that are performed there, will be reflected in the Respondent Editor.

It is not possible to edit any answers respondents have given to questions in the survey via the Respondent Editor.

15.3.1 Enter/Remove Search Fields

The respondent data editor is found under “Respondents” -> “Edit” in the main menu. The editor page is separated in three frames. The upper right-hand 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 it is possible to drag the split up and down. The frame on the left-hand 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 will be able to change the value of this variable for all respondents in the current search result.

Figure 378: Respondent Data Editor

Note: The SMTP fields will be available when Email Delivery Report is activated! (see section 15.4.6 Email Delivery Report for more information).

System Fields	Description
respid	Search field for respid. You can search for respondents by specifying the respid or a range of respids.
CapIntInterviewerId	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 SmtStatus.
smtpTaskId	TaskId for the batch task that sent the email.
noOfEmailsSent	Search field for number of emails sent. You can search for respondents by the number of emails they have been sent.
All User Fields, for example, name, email, etc.	All variables/fields that are uploaded into the survey with the respondent list.

Table 33: Respondent Data Editor Fields

Buttons	Description
Search	Perform search when the search parameters have been defined.
Delete	Delete the selected respondent(s)
Export	Exports the active set of respondents and variables to Tab delimited ASCII file.
Synchronize	Gives you the ability to update and/or append records from the respondent list into the response data. See section 15.3.5 Synchronization.
Select a View	The dropdown will display Views that you have predefined in Select Columns. The respondents will be displayed according to the chosen View.
Select Columns	Will open 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 dropdown.
Advanced Expression	Will open 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	Will remove the Advanced Expression from the search.

Table 34: Respondent Data Editor Buttons

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, and 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.

In order to define which columns/variables should be displayed, you can click the Select Columns button. When the button is clicked a pop-up window will be displayed 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, you can either double-click the variable in the Available items column, or you can 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, you can follow the same guidelines, only clicking the << button if you choose the items by ticking the check-box.

Select Columns

Select from the available items below

confirmit[®]

Close

Select action on views

Update default

Find

Find what

Find

☐ Match case

☐ Match whole words only

Available items

☐	
☐	link
☐	smtpStatusDate
☐	smtpstatus
☐	tries
☐	CapiInterviewerId
☐	userid
☐	sid
☒	gender
☐	smtpTaskId
☐	smtpcode
☐	LastUpdated
☐	noOfEmailsSent
☒	department
☒	name
☒	email

>>

<<

Selected items

☐	

OK

Cancel

Figure 379: Select Available items

If the list of Available items is very long, you can search for items in the “Find what” field.

When the desired fields are moved over to the “Selected items” list, leave the “Select action on views” dropdown on “Update default” and click the “OK” button.

Select Columns

Select from the available items below

confirmity®

Close

Select action on views

Update default

Find

Find what

Find

☐ Match case

☐ Match whole words only

Available items

☐ link

☐ smtpStatusDate

☐ smtpstatus

☐ tries

☐ CapiInterviewerId

☐ userid

☐ sid

>>

<<

Selected items

☐ name

☐ email

☐ gender

☐ department

OK

Cancel

Figure 380: Selected Fields

Now all the fields selected will appear as search fields in the main Respondent editor window.

Click on a field to u
ALL respondents sa
the search criteria

User Fields

☒ name

☒ email

☒ departm

☒ gender

System Field

☒ tries

☒ CapiInte

☒ userid

☒ sid

☒ smtpcod

☒ smtpstat

☒ smtpStat

☒ smtpTasl

☒ noOfEme

Expression: No advanced expression.

Delete

Search

Export...

Synchronize...

Select a view

Select Columns...

Advanced Expression.

respid	name	email	gender	department
6	Sara Jones	cp@firmglobal.com	female	Sales
7	Lise Niece	liepaniece@hotmail....	female	Sales
8	Alexander Carpenter	C@firmglobal.com	male	Sales
9	James Bond	traning@confirmity.com	male	Pros
10	Jeffery Birch	consultng@confirmity....	male	Pros

Page 1

Save

Delete

General

RespId

14

name

Clara Lions

email

manual@confirmity.com

gender

female

department

ProS

Figure 381: Selected Columns Shown In the Main Window

252

Sometimes you may want to have different views, depending on what 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. When in Selected Columns window, you can save a column selection as a View by selecting “Save As New” in the Select action on views dropdown.

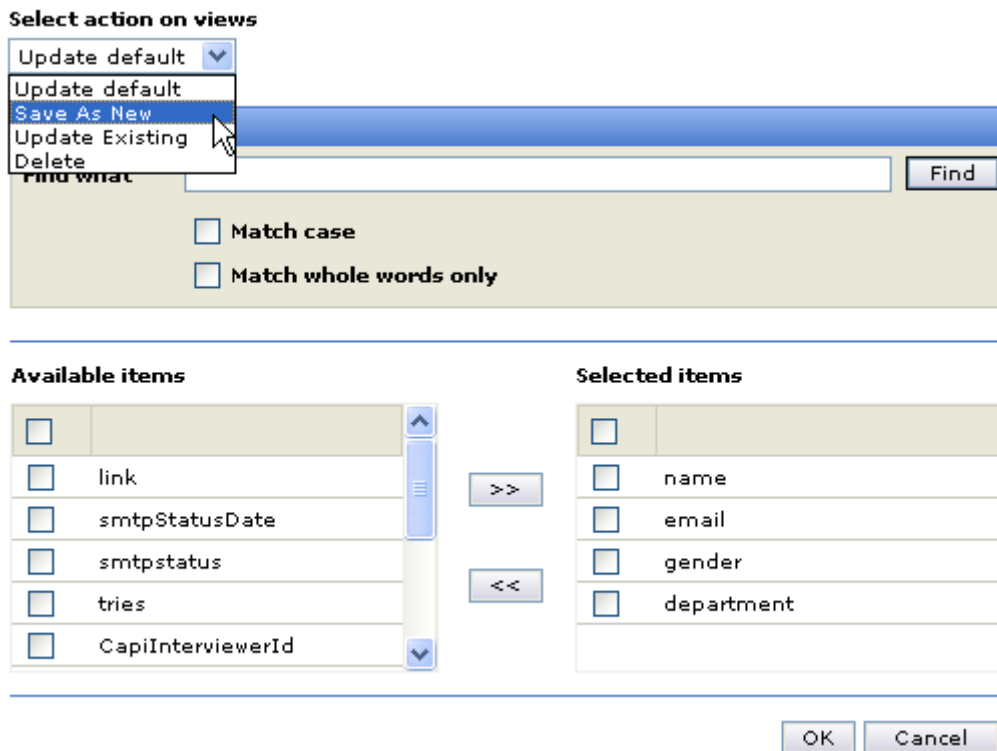


Figure 382: Save as new View

Once you select the Save As New item, a text field will appear next to the dropdown. In this text field you have to enter the name that you want to give the current view.

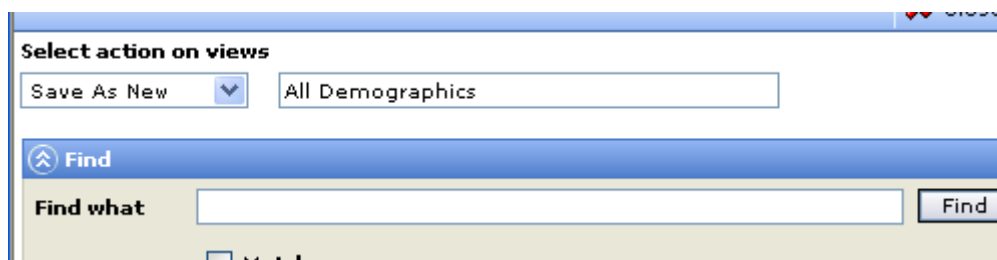


Figure 383: Name the View

The views you create can later be updated and deleted, if 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” dropdown in the main window. When you select a view from the dropdown, the columns specified in that view will be displayed.

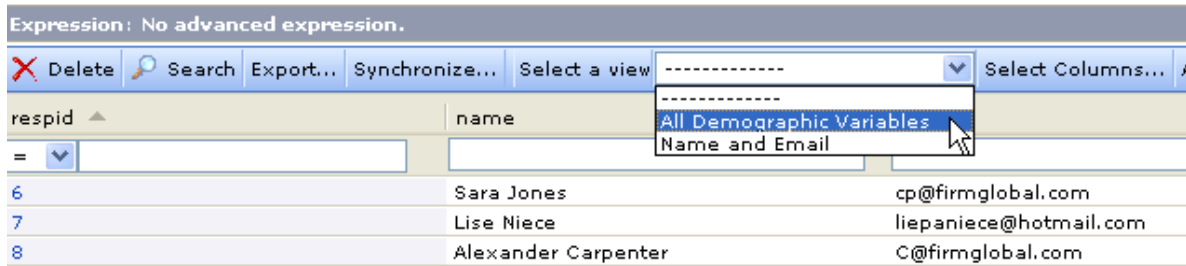


Figure 384: Select a View Dropdown

15.3.3 To Search

To make a search, write information in one or several of the fields and click the “Search” button. The result will be listed below the fields. To change the search you may enter the cursor in the fields, remove the text and, if necessary, write new text in the field. If nothing is written in any of the search fields and you click the “Search” button, all respondents in the database are listed. It is also possible to do search where only the first letters/figures are entered in a field or to use % in front of or behind a word or a few letters.

If the check box “Advanced” is checked, and open text field appears where advanced SQL search code can be written. This makes it possible to make more advanced combinations in the search. It will say in the main window: “Advanced expression in use” when an expression is active, and “No advanced expression” when it is removed.

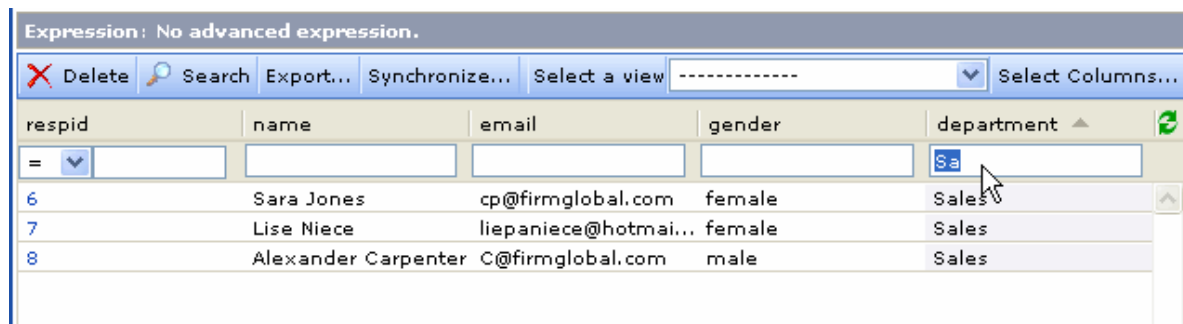


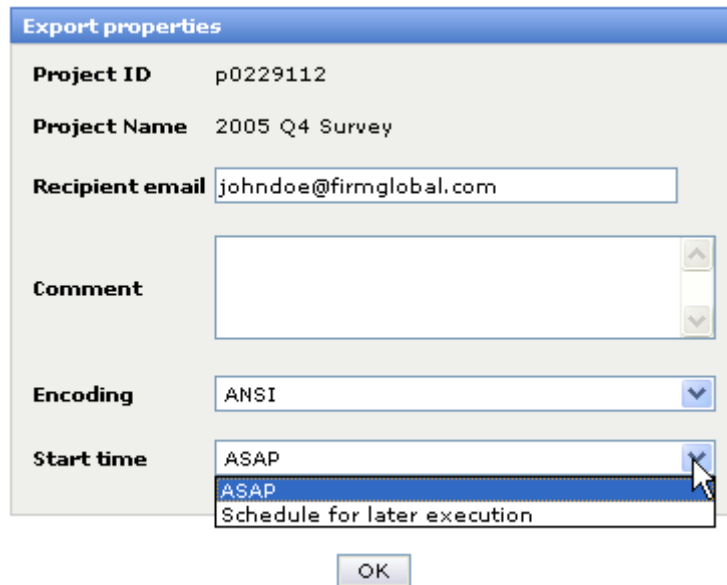
Figure 385: Making a Search

You can sort the respondents by clicking on the column/search field headings.

15.3.3.1 Respondent Export

The respondent data can also be exported. When a search has been performed, and the system returns a set of respondents, you can export the current search result.

To start the export, click the Export button. A new page Respondnets Export will be displayed:

A screenshot of a software dialog box titled "Export properties". It contains several fields: "Project ID" with the value "p0229112", "Project Name" with the value "2005 Q4 Survey", and "Recipient email" with the value "johndoe@firmglobal.com". There is a "Comment" field which is empty. Below it is an "Encoding" dropdown menu set to "ANSI". At the bottom is a "Start time" dropdown menu with a mouse cursor clicking on it, showing a list with "ASAP" selected and "Schedule for later execution" as an option. An "OK" button is at the bottom center.

Project ID	p0229112
Project Name	2005 Q4 Survey
Recipient email	johndoe@firmglobal.com
Comment	
Encoding	ANSI
Start time	ASAP Schedule for later execution

OK

Figure 386: Respondent export

The export file will be a Tab delimited ASCII file with field names in the first row.

15.3.3.2 Respondent Export with Access to Data Transfer Encryption and FTP

Note: Data Transfer Encryption and FTP is an Add-On. See section 1.4.3 Data Transfer Encryption and FTP.

In Respondents Export page, along with the usual settings, the user will have to choose the Encrypt file option. The encrypted file can then be either ordered by email, or sent to the FTP server. The user will have to decrypt the received files by using his/her private PGP encryption key.

Respondents Export

Respondents Exportp146916374

Export properties

Project ID

p146916374

Project Name

pgp test

Recipient email

File transfer

Encrypt file

☒

Comment

Encoding

Start time

OK

Figure 387: Respondent export with encryption

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, and then decrypt it with the private encryption key.

15.3.4 Update Data and Delete Respondents

There are two possible 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, click the respid of that respondent. A detailed page of this respondent is displayed in the lower frame with the search fields. See picture below.

Expression: No advanced expression.

respid	name	email	gender	department
=				Sa
6	Sara Jones	cp@firmglobal.com	female	Sales
7	Lise Niece	liepaniece@hotmail...	female	Sales
8	Alexander Carpenter	C@firmglobal.com	male	Sales

Page 1

General

RespId 6
name Sara Jones
email cp@firmglobal.com
gender female
department Sales

Figure 388: Updating Data on Respondents

Make the desired changes in the fields that are available and save.

It is possible to delete the selected respondent as well with the "Delete" button. When you click the Delete button, a dialogue box appears asking if you really wants to delete the respondent. It is not possible to retrieve a Deleted respondent. Note that the respondent is deleted from the respondent table, however if the respondent has answered the survey his or her answers to the questions in the survey are not deleted.

Note: Editing and deleting respondent data in this window changes / removes the data from the respondent table in the database. It is not possible to retrieve this data again. Proceed with caution.

Note: The button "Delete" 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, make a search and then in the left-hand frame click the variable you want to update. A pop-up widow will open. **Make sure you have the correct search result before updating responses.**

In the picture below, the search for respondents who belong to the Sales department, returned 3 names. Now we want to change their department to Professional Services. To achieve this, we have to click once on the "department" field in the User Fields folder.

Click on a field to update ALL respondents satisfying the search criteria

User Fields

name
email
department
gender

System Fields

tries
CapiInterviewerId
userid
sid
smtpcode
smtpstatus
smtpStatusDate

Expression: No advanced expression.

respid	name	department
=		Sales
8	Alexander Carpenter	Sales
9	James Bond	Sales
10	Jeffery Birch	Sales

Figure 389: Updating Sets of Respondent Data

A pop-up window will open. In this pop-up window, the name of the field and a text box next to it will be displayed. In the text box, we have to write the new value of the variable, in our case, "ProS", and then click OK. A warning will be displayed, asking you to confirm if you want to update this set of respondents.



Figure 390: Updating Sets of Respondent Data

Once the change has been implemented, the main window will update, displaying "No items available", since the value of one of the fields was changed.

15.3.5 Synchronization

The synchronize functionality gives you the ability to update and/or append records from the respondent list into the response data. This can for example be useful in the following scenarios:

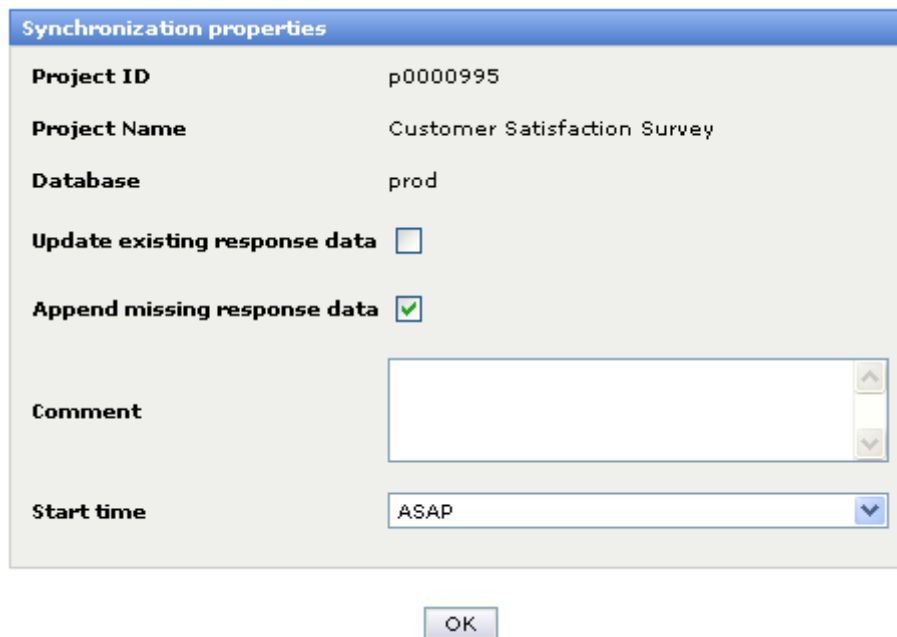
- If you have to make changes to background variables after the data collection has started, and some respondents have already started answering the questionnaire. These respondents will then already have data in the background variables in the response data set. Background variables in response data will not be affected by changes done in 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. Since 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 hitlist, 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.

In this example, we want to update the background variables "name" and "email" in a survey. When you click the Synchronize button, the Synchronization Properties window will be displayed.



The dialog box titled "Synchronization properties" contains the following fields and controls:

- Project ID:** p0000995
- Project Name:** Customer Satisfaction Survey
- Database:** prod
- Update existing response data:** ☐
- Append missing response data:** ☒
- Comment:** A text area with up and down arrow buttons on the right.
- Start time:** A dropdown menu currently showing "ASAP".
- OK button:** Located at the bottom center.

Figure 391: Synchronization properties

Update will update those background variables for respondents resulting from the search (in our case "email" and "name"), which already are represented in the response data.

Append will add respondents resulting from the search, which are not in the response data, and insert data for those background variables.

15.4 Sending E-mail

Confermit 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 in order 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" e-mails to respondents who have completed a web interview.

The e-mail wizard is accessed through the **Respondents > Emailing** menu.

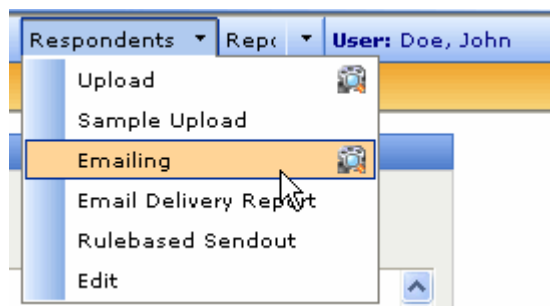


Figure 392: Enter Emailing

The wizard will take the user through the following steps:

- **Respondent selection and Email Setup:** Select which respondents should receive the e-mail and specify the content of the e-mail.
- **Preview and confirmation:** Preview respondents who match the selection criteria.
- **Sending e-mail:** Send the e-mails to the selected respondents.

More information about these steps is presented in the following sections.

15.4.1 Step 1: Respondent Selection and Email Setup

When distributing email invitations from a survey, you may choose either to use predefined emails, set up in the questionnaire in the email object (see section 7.2.12 Email), 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.

When you have entered the emailing wizard, the screen below will be displayed. It consists of 3 main areas: Selection Criteria where all System fields and User fields will be displayed, Preview Options where you can define how many respondents corresponding to the current selection criteria, should be shown in preview, and Email where you define the emailing options and the email body and subject.

If you have predefined email objects in the current project, they will be displayed in the Emails dropdown. Here you can choose the email that you want to use for the current invitation sendout.

If you do not want to use a predefined email, you can choose the "Create new email" option, and set up a new email. The emails you set up directly in the Emailing Wizard and save, will be saved in the questionnaire and accessible to you for later emailings when needed.

Note: You can also set up emailing tasks for later execution before there are matching respondents uploaded into the database.

Setup	
SELECTION CRITERIA	
Max no of records	
Respondent status	Any ▾
noOfEmailsSent	
userid	
smtpstatus	
PREVIEW OPTIONS	
Max no of preview records	10 ▾
EMAIL	
Emails	e1 ▾
Save -- Font -- ▾ -- Size -- ▾ Text Wysiwyg Html Id e1 Deleted Read only Include link Use HTTPS Send as Html Send as plain text Override recipient email Send email FW Send confirmation email nigel.bennett@confirmit.com From nigel.bennett@confirmit.com Display Name Adam Apple Reply to nigel.bennett@confirmit.com Default language English ▾ English Encoding: Western European (ISO) Activate language ☒ Subject	

Figure 393: E-mail setup

Note that this screen may vary depending on the column names of the respondent file. All System fields and User fields will be presented under *Selection criteria*.

Figure 394: Email Setup Text Fields

In this step, the user enters the selection criteria that will determine which respondents will receive the e-mail. See also section 15.3 Respondent Data Editor for explanations of the other System Fields in emailing and Respondent Editor.

15.4.1.1 The Selection Criteria Area Properties and Fields

- **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.
- **Number of emails sent** – The number of e-mails sent is recorded for each respondent, and can be used as a selection criterion. **Note: The noOfEmailsSent column will only show the number of emails sent to the respondents in the 'email' column.**

Other fields:

eg "email" – The wizard displays all fields from the respondent list that may be used in selection.

Status

- **Any** – All respondents
- **Not answered** – All respondents who have not entered the survey
- **Complete** – All respondents who have completed the survey. (Useful for sending "Thank you" e-mails).
- **Incomplete** – All respondents who have started answering the survey, but have not yet completed it.
- **Screened** – All respondents who have the "Screened" status (See section 7.2.6 Stop-objects).

- **Quota full** – All respondents who have been stopped due to a full quota. (See section 7.2.6 Stop-objects.)

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*.

Under *Preview option* the user can choose 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 The Text Tab 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 link option.

- **Send as HTML** – check to send the email as HTML code. Only mail clients that support HTML will be able to read the email.
- **Send as plain text** – check to send the email as plain text. Most mail clients will be able to read it.
The email object will have two text fields for each language: one for HTML body and one for Plain text body. When sending 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 dropdown. 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.
- **Send email FW** – select this option and select a column from the dropdown 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.

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. See also section 0 The system will automatically select the Encoding that has been assigned to a language on the server.

Fixed Sender Domain and Email Delivery Report Functionality.

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 (see chapter 15 Handling Respondents in Limited Surveys for more information on limited surveys and respondent lists). 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.

The system will automatically select the Encoding that has been assigned to a language on the server.

15.4.1.3 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 (see section 15.4.6 Email Delivery Report for further 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.

Note: On-Premise clients must license Premium Emailing to access this functionality. On-Premise clients should contact their Account Manager for further information.

Note: This functionality will not work in Lotus Notes; only the email address will be displayed.

Read more about the Email Delivery Report functionality in section 15.4.6 Email Delivery Report.

15.4.2 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.

15.4.3 Avoiding Unnecessary Respondent Inquiries

In order to avoid unnecessary failure messages and inquiries from respondents when running limited Web-surveys, we strongly recommend including 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 back and forth by clicking on the >> and << buttons, or just >> if the back button is disabled. Do not use the browser's "back" and "forward" buttons, or your answers may not be saved!
- If you are not able to switch to the next page, you might 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! 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 *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.

15.4.4 Step 2: Preview and Confirmation

By pressing the **Next** button, the user is taken to step 2 of the e-mail wizard.

In this step, a preview list of respondents shows which respondents will receive an e-mail, based on the selection criteria entered in step 1. The maximum number specified under Preview options in step 1 limits this list.

In addition, a preview of the e-mail is shown.

At this point, the user can choose to cancel the e-mail wizard altogether and return to the *Project overview* page; he can choose to go back to step 1 to edit the selection criteria; or he can choose to proceed with sending e-mails and go on to step 3 of the wizard. The Preview will be shown in project's default language. This can be changed in the lower right corner of Confirmit, in the "Language" dropdown.

15.4.5 Sending E-mails

This is the final step of the e-mail wizard. At this point, the e-mails will be queued for delivery to the selected respondents.

When sending emails, a standard check will be run on the email list. The message will not be sent to invalid addresses. The Confirmit user will receive a mail from the system on how many emails have been sent, and how many mails it has failed to send.

After having 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 your survey out, *Next*. Clicking on *Next* will bring you to the screen shown in Figure 395: Batch Emailing.

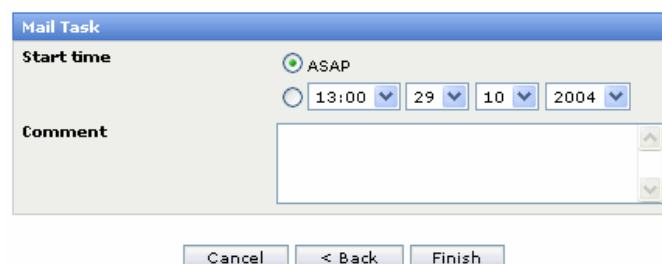


Figure 395: Batch Emailing

Here you can schedule when you wish your survey to be sent out. Clicking on *Finish* will bring you to the *Task Manager* where you can monitor the progress of your batch job.

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.

Task instance properties

Properties Log

Task type	Batch Emailing
Task ID	351
Schedule	2004-10-29 14:11:54
Status	In queue
Approx % completed	0%
Start time	-
End time	-
Time usage	00:00:00
Assigned server	

[\[Task definition \]](#)

Figure 396: Task properties for batch emailing

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.

If you plan to send reminders to those who have not answered or have not completed the survey, you have an opportunity to set up a recurring task. Then the first time you will be sending reminders, for example to those who have not answered the survey, you will have to do the following:

In the Respondent status in Selection Criteria choose *Not answered*

Fill in the necessary information in *From*, *Subject*, *Body*, etc. fields, or choose a predefined email.

Follow all the steps as described above until you have been brought to the Task Instance Properties for the batch emailing

Click the **Task definition** button, and you will be brought to the Task definition properties

Task definition properties

Properties Recurr Instances Parameters

Task type	Batch Emailing
ID	351
Owner	johndoe
Company ID	2
Project ID	p0000995
Comment	

Save

Figure 397: Task Definition Properties

Go to the **Recurr** tab to see the Recurrence pattern for the batch job

Recurrence pattern

Properties Recurr Instances Parameters

Current settings Initial start time = 10/29/2004 2:11:54 PM

Change

Figure 398: Recurrence Pattern

Click the **Change** button and set Recurring task to **Yes**, and choose the Recurrence pattern type and Range of recurrence

The screenshot shows a configuration window titled "Recurrence pattern" with four tabs: "Properties", "Recur", "Instances", and "Parameters". The "Recur" tab is selected. The window contains several sections: "Current settings" showing "Initial start time = 4/28/2004 12:22:11 PM"; "New start time" with radio buttons for "Disable task (clear queue)", "ASAP" (selected), and a time/date picker; "Recurring task" with a dropdown set to "Yes"; "Recurrence pattern type" with radio buttons for "Hourly", "Daily", "Weekly", and "Monthly" (selected); "Range of recurrence" with an "End by:" section containing three dropdowns set to 30, 12, and 2004; and "Monthly schedule" with a section "Day 0 of every 0 month(s)". A "Save" button is located at the bottom center.

Figure 399: Choosing Recurring Task

Those who still have not answered the survey will be sent a reminder each time the batch emailing is scheduled by the Recurrence pattern.

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

Note: 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.

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 Figure 400 appears.

Status	Count
NonDeliveryReport	4
MessageSent	1

Figure 400: Email Delivery Overview

If you have sent invitations several times from the same project, choose the Task ID of interest in the Task ID dropdown. 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** – SMTP server could not send the message because the email address is not valid.
- **Queued** – Email is in the sending server outgoing queue.
- **MessageSent** – 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 get 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** – 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 dropdown.

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.

respid	smtpstatus	email
1	NonDeliveryReport	cp@firmglobal.com
2	NonDeliveryReport	liepaniece@hotmail.com
4	NonDeliveryReport	traning@confirmit.com
5	NonDeliveryReport	consultng@confirmit.com

Figure 401: Respondent Editor

For more information on the Respondent Editor see section 15.3 Respondent Data Editor.

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 send-outs 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 Company), 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 : 212.100.250.11, Priority: 10
IP-address 2 : 72.3.137.171, Priority: 30	IP-address 2 : 212.100.250.67, Priority: 30

4. Test that the chosen domain name now has the correct MX records.
5. Notify Confirmit Company 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@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 fill in surveys, to send reminders and to thank them for participation in surveys. However, sending an e-mail to one or more valid addresses is no guarantee that the message is being delivered. A Fact Sheet about different causes for non-delivery is available from Confirmit Company's Extranet. In the following we will concentrate on measures introduced in Confirmit to help mails be delivered. This chapter primarily addresses 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 down 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 in any country they are operating, as well as with Confirmit's AUP. Clients operating on 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 for which the sending server is included in a black-list. The reason for a sending server being black listed is generally 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 on an ongoing basis and observe that recipients of survey invitations sometimes cause the Confirmit e-mailing servers to be listed for shorted 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), whereas the sending server address is a Confirmit domain. This may be considered as e-mail spoofing, a technique used by spammers, and causing 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 sections below 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 receive reply mails, you will have to specify a valid email address in the **Reply to** field.

Note that "Out of Office" replies will always be sent to the From address according to the emailing standard.

Note: Even if the Fixed Sender Domain/Email Delivery Report is activated, the Confirmit user can still choose to use another "From" (sender) address. In this case a warning will be displayed in Confirmit informing that this may cause the e-mails to be perceived as spam, and that the Email Delivery Report will be incomplete.

15.5 Handling Respondents in Multilingual Projects

In multilingual projects it is necessary to ensure that the respondents get 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 securing that respondents get the survey in a particular language:

In open multilingual surveys you may have a Single question with the question ID **I** (as in language) as the first question of the survey. You will have to use the actual languages as answers, and the language codes (see Confirmit Language Codes) as precodes.

The respondents will get the next question in the language they chose 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/pXXXXXXXXX.aspx?l=9> (for English)

<https://survey.confirmit.com/wix/pXXXXXXXXX.aspx?l=10> (for Spanish)

etc.

15.5.2 Limited Multilingual Surveys

When it comes to limited surveys, you may:

- Include a column with a tag *language*, which specifies the language each respondent will get the survey in (see section 15.1 Preparing the Respondent List). The contents of the column must be Confirmit language codes (see APPENDIX B: Confirmit LANGUAGE CODES).
- The other option is to include a Single question with the question ID **I** in the survey, as mentioned above (see section 15.5.1 Open Multilingual Surveys).
- In multilingual surveys with login-page (see section 14.2.4.7.4 Limited Survey with Login Page) the respondents are presented with a drop-down where they can choose language.

Note that you have to give the respondents the possibility to modify their answers after initial submission, because when the respondents will reenter the survey, they will get it in the survey default language. If they are allowed to go back in the survey, they will be able to choose their language again.

15.6 Rule Based Send Outs

Rule Based Send Out functionality, as Sampling (see chapter 16 Basic Panels), is based on a Rule editor wizard. While the samples in Sampling are extracted from the list of panellists, Rule Based Send Outs are project based, and the answers of the uploaded respondents are used to build the rules.

You can also use the projects linked to a panel in Rule Based Send Outs.

To make a rule for Rule Based Send Outs, you will have to select a project you want to use as basis for send outs from your project list. This project can be a limited survey, or a survey linked to a panel. You have to have sent this survey to the respondents before you create the rule and define the target project. Click the *Rule based send out* link in the *Respondents* menu.

You will be brought to the Rule based send out Rule list. The list will be empty the first time you enter the *Rule based send out* link in a project.

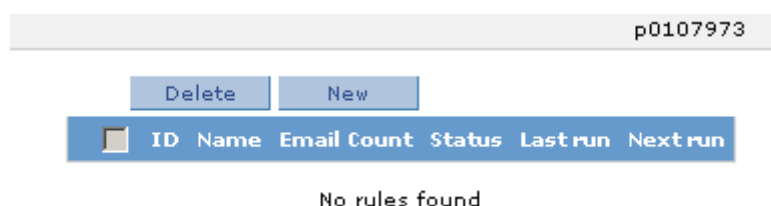


Figure 402: Rule List

If any rules have been defined, they will be listed in this overview.

Delete		New				
☐	ID	Name	Email Count	Status	Last run	Next run
☐	1	eggs	0	Aborted by system	2002-05-30 11:29:17	Never

Figure 403: Rule List With a Rule

Setting	Description
ID	The rule ID given by the system.
Name	The name of the rule.
Email Count	Number of respondents corresponding with the rule criteria.
Status	States whether the task is complete, incomplete, etc.
Last run	Specifies when the rule was created.
Next run	The sending of the target survey as a rule will be a recurring task. The time of the next run will be specified here.
Delete	If you want to delete a rule, check the checkbox, and press the Delete button. You will not be able to delete a rule that is being used in an active project.

Table 35: Rule List Fields

To create a rule, click on the *New* button. The Rule Editor Wizard will be displayed.

Figure 404: Rule Editor Wizard for Rule Based Send Outs

In the questionnaire you can highlight the question on which the rule will be built. You can also use Background variables in order to create a rule. The Rule builder will be displayed. You build the expressions in the same manner as you build conditional expressions, i.e. by clicking on the items in Variables, Operators, and Values. When you have defined the rule, you can check whether the expression is correct by clicking the Check button.

Note: If there are one or more OR in an expression, these expressions should be placed in brackets: for example ([q1]='1' OR [q1]='2').

Setting	Description
Name	The name of the rule.
Expression	The field where the expression is entered.
Email delay	Here you can enter the number of days the sending of the target project to the respondent should be delayed for. The default is 0 days.
Check	Clicking this button will check whether the expression is correct.
Undo	Clicking this button will undo the last action added to the expression.
Variable	This list will show the question ID of the selected question.
Operators	This list includes most of 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 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.
Cancel	Clicking this button will bring you back to the Rule list.
Next	Clicking this button will bring you to the Email set-up of the Target project. (See Figure 136)

Table 36: Rule Editor Wizard Settings

When you have defined the rule, click the Next button. The email setup window will open.

Figure 405: Email Set Up for Rule Based Send Outs

Setting	Description
Target Project ID	Here you 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. 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 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 have a link (URL) to the web interview at the bottom of the email (default).
Secure	When checking this, 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	Clicking this button will bring you to the Rule list.
Back	Clicking this button will bring you back to the Rule Editor Wizard.
Next	Clicking this button will bring you to the Schedule set-up, where you also can preview the email message.

Table 37: Email Setup Settings

When you have specified all the details in the Email set-up, click the *Next* button, and you will be brought to the Schedule set-up. Here you can 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.

In Start time dropdown you can specify whether you want this job to start ASAP or Schedule it for later execution. When you click the *Finish* button, you will be brought to the Task Settings, where you will be able to define the Recurrence pattern of the job. It is recommended to define the Rule based send outs as Recurrent tasks, since the respondents will be participating in the original survey at different times.

Note: To make sure that your respondents do not receive multiple emails, you must perform the following steps after the first batch of emails goes out:

Go to *Tasks* → *Search*. Then enter your original project ID to search for the batch-emailing task. Once you find *Batch Emailing* task, click on its ID and you will be brought to *Task instance properties*. Click the *Task definition* button at the bottom of the page and you will be brought to *Task definition properties* where you have to click on *Parameters* tab. Here in *Selection Criteria* in *noOfEmailsSent* type in the following expression: `=0`, then click *Save* button. Also if you would like to change or confirm your recurrence pattern, click on *Recurr* tab and then *Change* button.

STEP 3 - Schedule setup

Target project p0005050 - TV Channel Survey

Load respondents Append

Start time ASAP

Email preview

To kristinem@firmglobal.com

From johndoe@userguidecomp.com

Subject Follow Up

Body

Dear Respondnet!

<https://192.168.12.67/wi/p0005050/i.asp?r=1&s=FGYSKKKX>

Cancel < Back Next > Finish

Figure 406: Schedule Set-up

Even though the link appearing in *the Email Preview* might include original project ID instead of the target project's, 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 relaunched 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 relaunch the panel survey. A relaunch 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 relaunched after Confirmit was upgraded to version 10, this has already been done. Java-based portals that have not been relaunched will cease to function in Confirmit 11, so if the panel is live it must be relaunched 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.

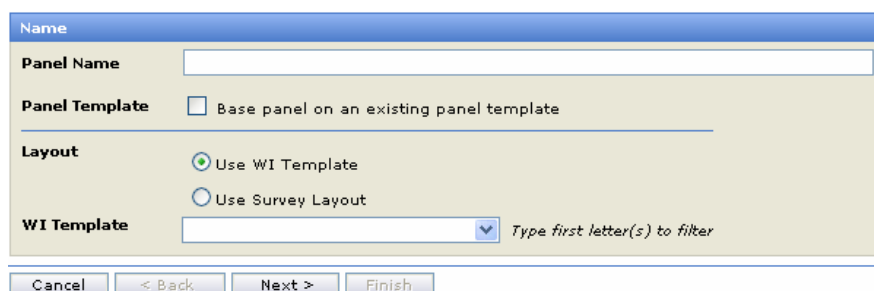


Figure 407: The Panel Name window

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.
3. If you select to base the panel on a template, then when you click **Next** the panel will be created from the template.
4. If you select to use a survey layout, then you must select the layout to be used.
5. 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 section 3.9 Search Lists, 4.4 Projects, and 4.5 Basic Panels 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. See Chapter 6 Project Management 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.

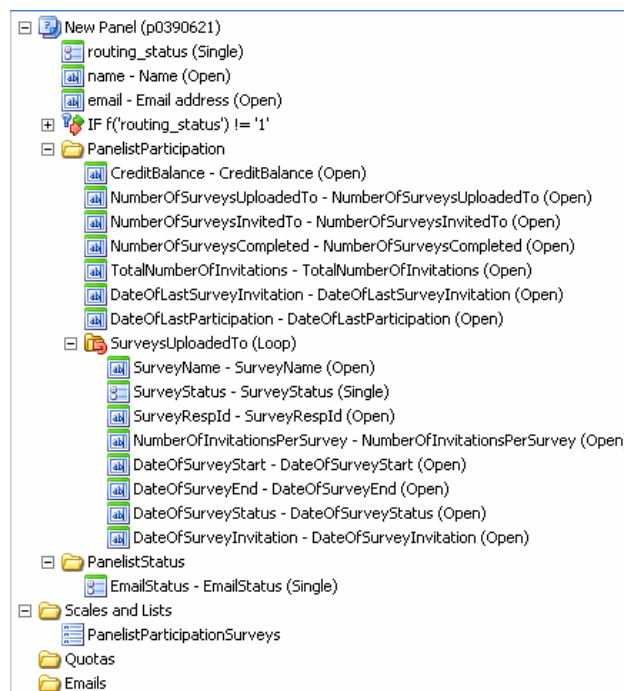


Figure 408: The default Panel questionnaire

You cannot remove the default objects from the tree, but as project manager you may customize the objects and add new questions as required.

16.5 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 Conformat Scripting manual for the functions and scripts to set up the calculation.
NumberOfSurveysUploadedTo	Total number of surveys the panelist has been uploaded to.
NumberOfSurveysInvitedTo	Total number of surveys the panelist has been invited to (by email).
TotalNumberOfInvitations	Total number of invitations sent to the panelist across all surveys.
DateOfLastSurveyInvitation	The date and time of the last email invitation to any survey the panelist is uploaded to.
DateOfLastParticipation	The date and time when the panelist last accessed any of the surveys he/she is uploaded to.
SurveyName	Project name of the survey (from overview).
SurveyStatus	The panelist's current status on the project (e.g. complete, screened etc.)
SurveyRespid	The respid of the panelist in the survey project's database.
NumberOfInvitationsPerSurvey	The number of email invitations sent to the panelist for the project (noOfEmailsSent).
DateOfSurveyStart	The date and time the project was last accessed by the respondent (interview_start).
DateOfSurveyEnd	The date and time the project was finished by the respondent (interview_end).
DateOfSurveyStatus	The date and time the survey status was last set for the panelist on the project.
DateOfSurveyInvitation	The date and time the last email invitation was sent to the panelist on the project.

16.6 The PanelistStatus Folder

The PanelistStatus folder contains the variable EmailStatus that will hold the Email Delivery Status (see section 15.4.6 Email Delivery Report) 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.

16.7 Launch Panel

When the project manager has created the questionnaire, the response database can be created. The process is exactly the same as for all other Confirmit projects: see chapter 14 Preparing for Data Collection.

A survey for panelist recruiting may be deployed as any other survey in Confirmit, that is, as an Open survey available to anyone, or as a Limited survey where you already know your respondents.

After having compiled the response database, the web interview must be generated. This is done in the same way as for other projects in Confirmit. See chapter 14 Preparing for Data Collection. The only differences are the following:

- In addition to choosing the template for the survey in Layout, you must also choose the template for Panelist pages. This is the layout of the web pages where the panelists can log in and get an overview of their profile (see section 16.8 Panelist Web Page Templates).
- 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).

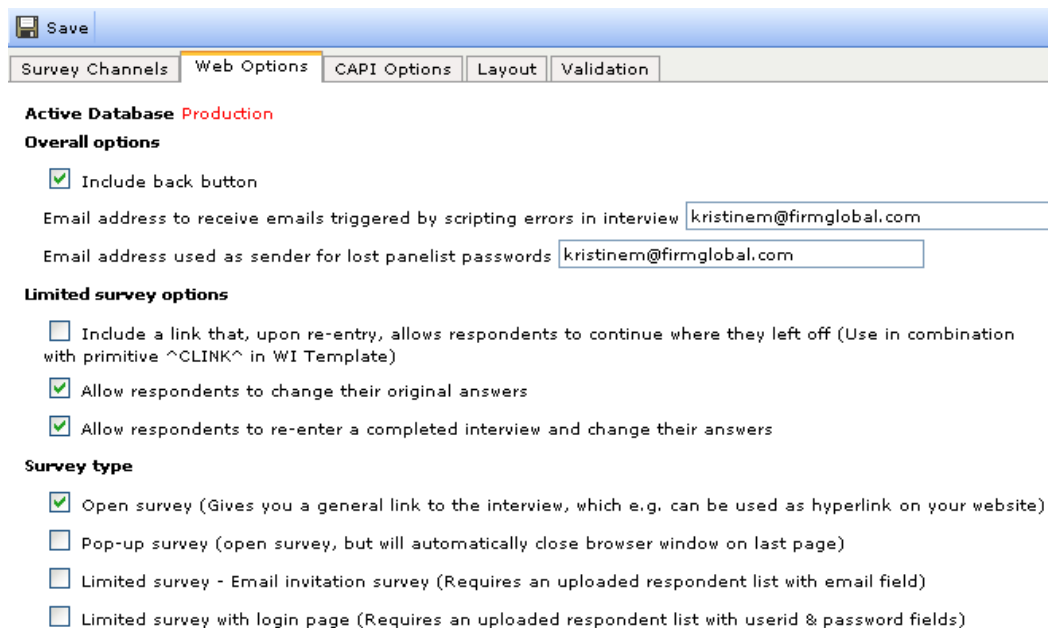


Figure 409: Survey Settings for Panels

16.8 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.

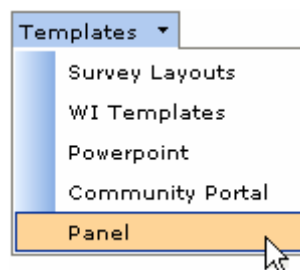


Figure 410: Accessing the Panel Templates Editor

The Panel Templates page opens.

2. Click on a template in the Template List then click **Edit** to open the Editor for that template.

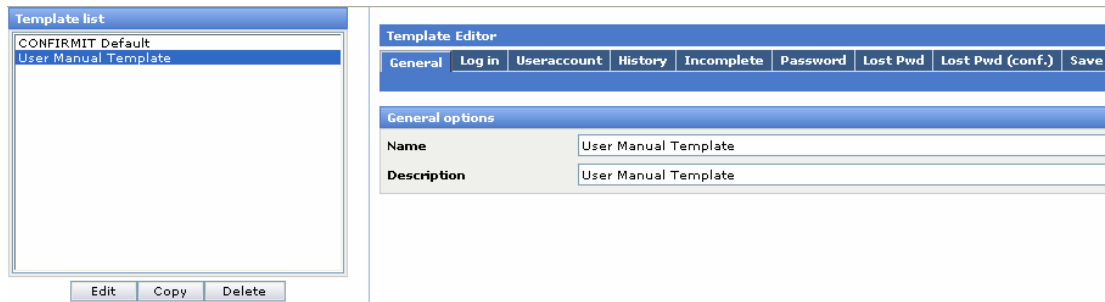


Figure 411: Example of the Panel Template Editor

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.

Figure 412 below shows the template editor for the panelist Login page:

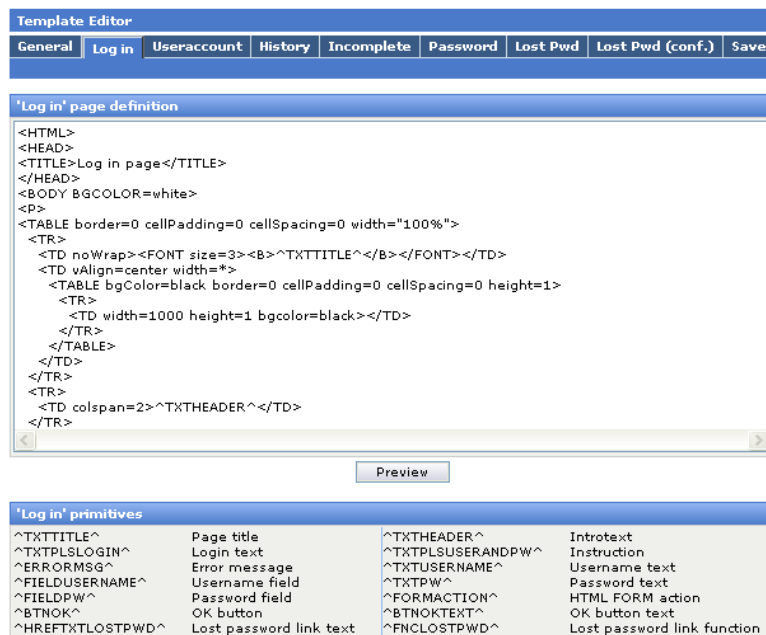


Figure 412: Login Page Template Editor

The remaining Template Editor tabs have a similar layout. Edit the template in HTML, and click **Preview** to see a preview of the page.

16.8.1 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 Figure 412.

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 are translated into English, Norwegian, Swedish, German, French, Spanish, Finnish, Danish, Italian, Dutch and Portuguese. For other languages, error messages will default into the main category (for example, Venezuelan Spanish will default to Spanish). If a language is not available, the error messages will be displayed in English, this being the overall default language.

Click the **Preview** button to show the layout of the particular page.

PANELIST LOGIN PAGE

This is the panelist login page

The screenshot shows a web form titled "Please Log In" in a blue header. Below the header, a red error message reads "The user name or password is illegal". Underneath, a prompt says "Please type your user name and password to enter". There are two input fields: "User Name" and "Password". At the bottom right of the form area, it says "Powered by CONFIRMIT". Below the form, there is an "OK" button.

Figure 413: Preview 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.

16.8.2 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 will open, prompting for his/her email address. The pop-up may look, for example, as follows:

The screenshot shows a small pop-up window. It has a text prompt "Please type in your email address." above a single-line text input field. To the right of the input field, a red error message reads "Please enter a valid email address." Below the input field, there are two buttons: "OK" and "Cancel".

Figure 414: Example of a Panelist email address pop-up

Edit the layout of this pop-up in the **Lost Pwd** tab in the Panel template.

Note: For security reasons, no error message will be generated if the email address provided is not found in the panel.

If the email address is found, two separate emails will be sent to that address, one containing the userid and the other the password. The sender of those emails is set up in Survey Settings, in the field: "Email address used as sender for lost panelist passwords". See section 14.2.3 Survey Settings.

16.9 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.

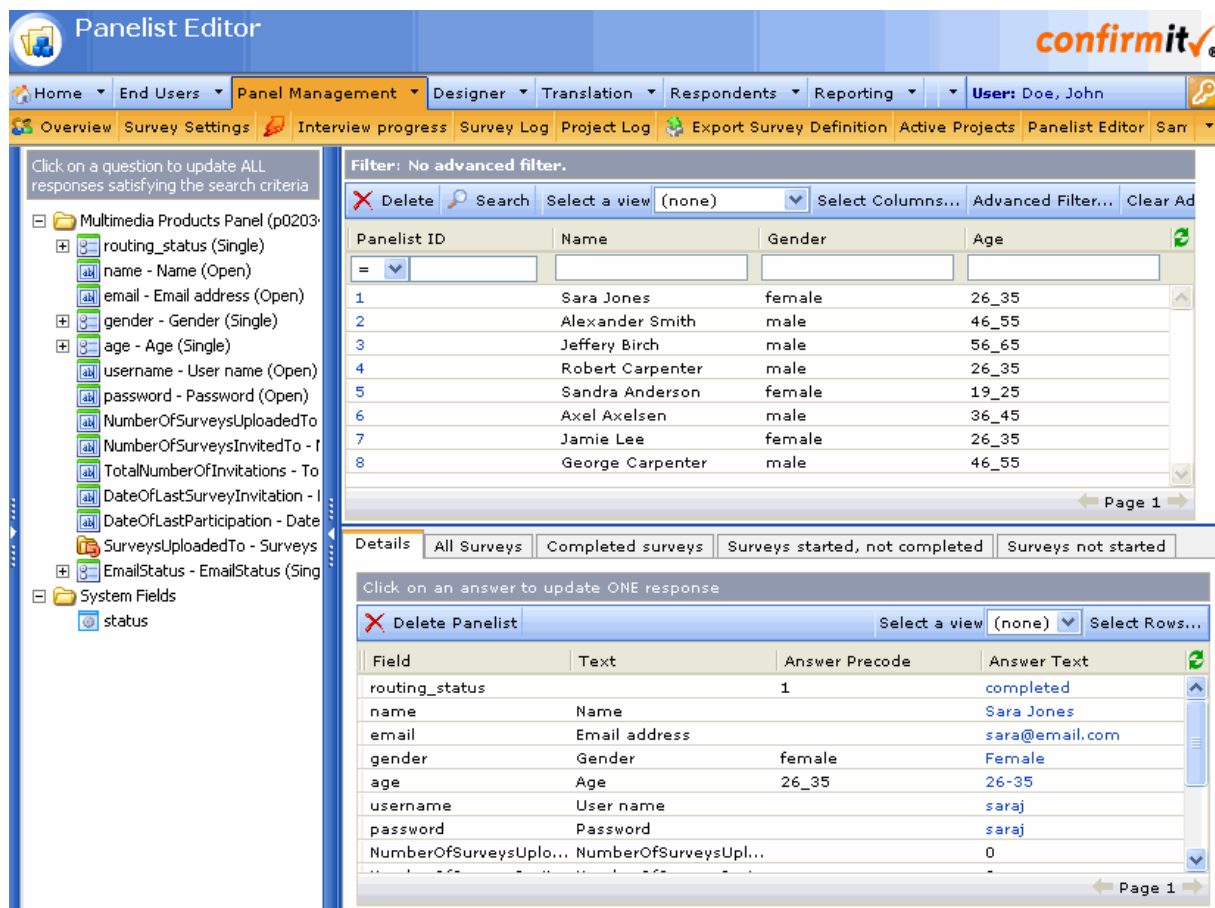


Figure 415: Panelist Editor

The Panelist Editor's search and edit functionality is the same as that of the Survey Data Editor described in section 25.2 Edit Survey Data. 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 section 25.2 Edit Survey Data.

16.10 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.

16.10.1 How to Define a Sample

To create a sample:

1. Go to the **Panel Management > Sampling** menu command.

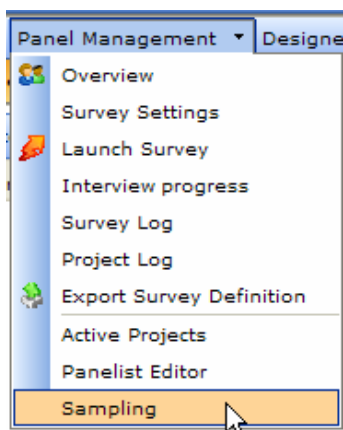


Figure 416: Panel Management Menu

The Sample List page opens. This page lists all the samples for the current panel.

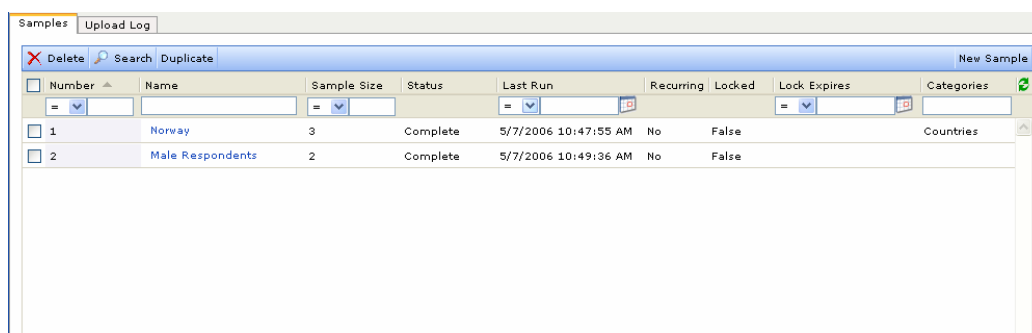


Figure 417: Example of a Sample List page

- Click the **New Sample** button in the upper right corner of the list.

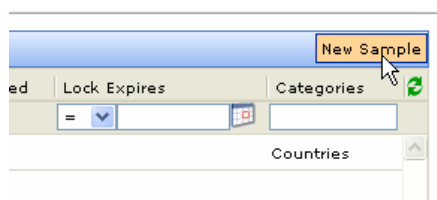


Figure 418: Creating a new sample

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.

Save Delete Duplicate Back to Sample List	
General Expressions Excluded Samples Test Upload Log	
Sample Number	1
Name	Male 26-45
Categories	Male Panelists
Sample Size	-
Status	-
Last Run	-
Sample Generation	[Schedule] [Run Now]
Locked	☐
Lock Expires	

Figure 419: Sample Definition

16.10.2 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.

16.10.3 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.

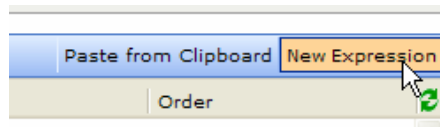


Figure 420: Creating a new Expression

The Expression Builder window opens.

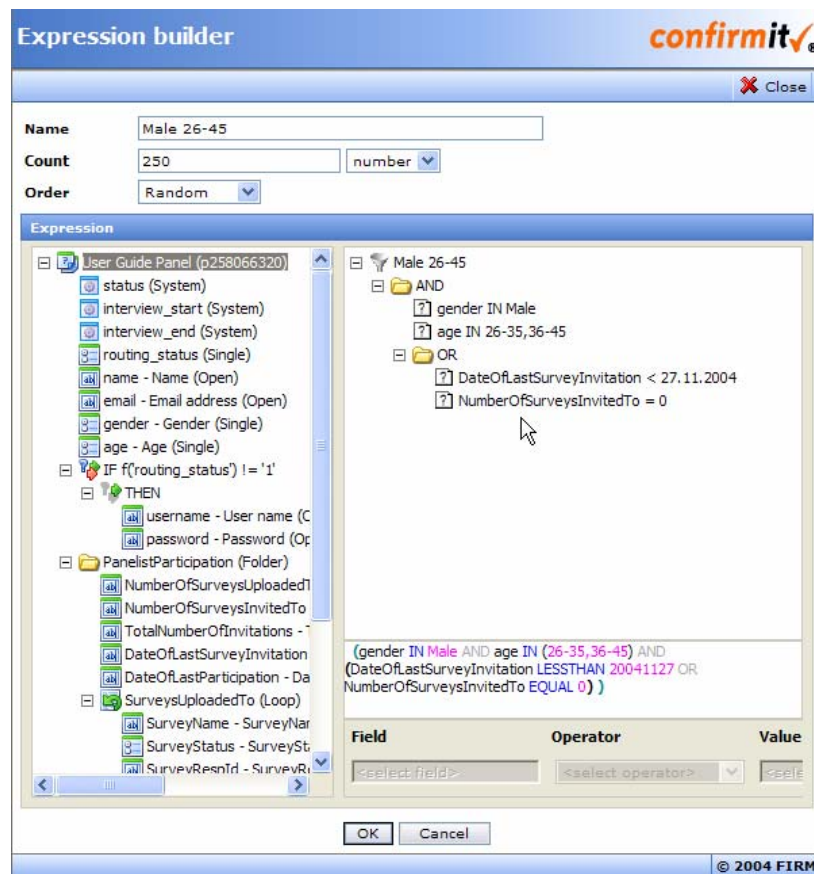


Figure 421: Expression Builder

You can 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 as well. It is required to 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.

The expression builder uses the same functionality to define the expression as filters for Topline Report. See chapter 19 Advanced Filter Designer.

The Count setting defines the target 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.

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. See figure below.

Figure 422: Excluding samples

If you want an estimate of the number of panelists that would result from running the sampling on the panel, use the "Test sample" functionality under the Test tab. This will return an estimated count. You may choose to ignore any locked samples when performing this test.

Figure 423: Test Sample

If you wish to copy an expression used in one sample definition into another sample definition, use the **Copy to Clipboard** functionality in the expression list.

Click on the Upload Log tab to track which projects the sample has been uploaded to and when it was uploaded.

Id	Project Id	Sample Size	Upload Size	User	Date	Task Id
1	p0064342	8	8	johndoe	9/23/2005 3:35:22 PM	4803
3	p0221931	8	8	johndoe	9/23/2005 3:37:28 PM	4805
4	p0060487	8	8	johndoe	9/23/2005 3:37:59 PM	4806

Figure 424: Upload Log

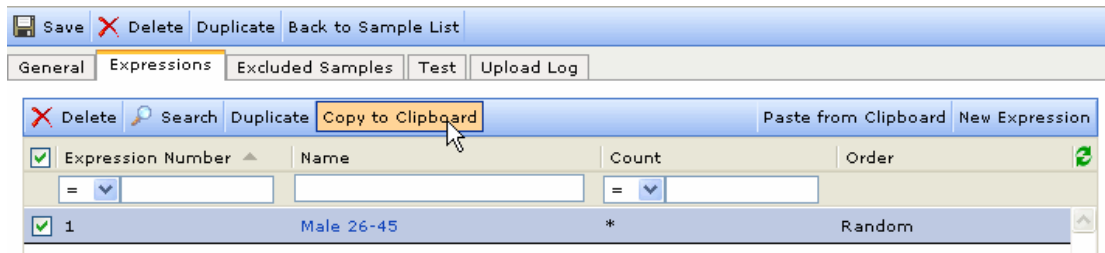


Figure 425: Copy Expression to Clipboard

Then you can 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.

16.11 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.

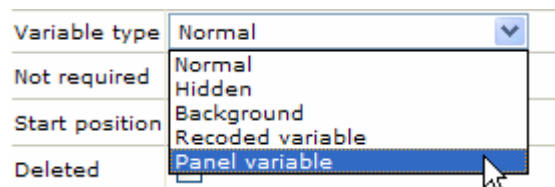


Figure 426: Adding a Panel Variable to the Survey

The surveys can either be sent to the panelists by email or, as uploading the panelid and panelistsids into the survey creates the links between the panel, panelist and the surveys, the panelists can access their panelist login pages. See section 16.13 Panelist Login Pages.

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**.

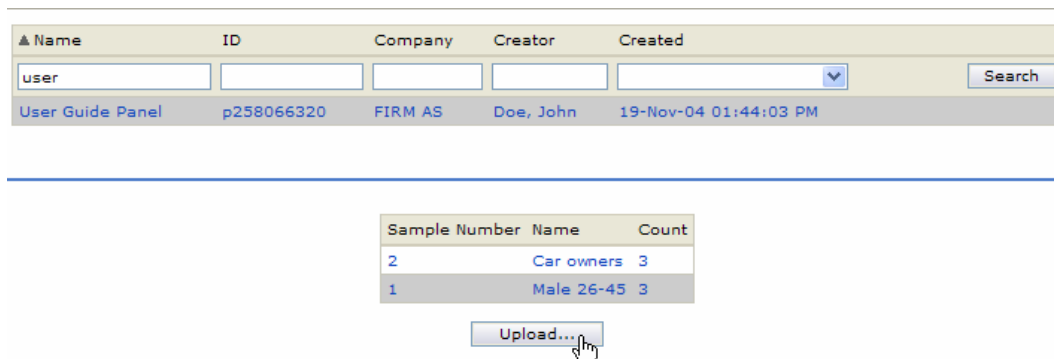
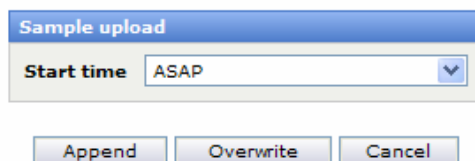


Figure 427: Uploading the sample

The same choices as when uploading respondent lists will then appear. See section 15.2 Uploading the Respondent List.



A dialog box titled "Sample upload". It contains a "Start time" label followed by a dropdown menu currently showing "ASAP". Below the dropdown are three buttons: "Append", "Overwrite", and "Cancel".

Figure 428: Sample Upload Step 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. (See section 16.13 Panelist Login Pages)

16.12 Survey Overview in a Panel

The Project Manager can view all the projects linked to a panel by selecting a panel and going to the **Panel Management > Active projects** menu command.

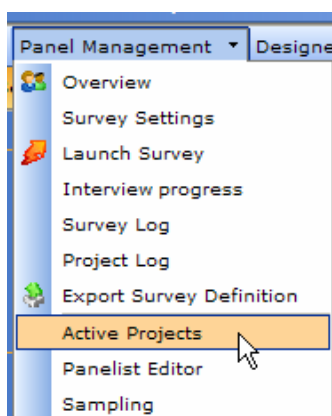


Figure 429: Select Active Projects

This screen will list 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.



A screenshot of the "Active projects" screen. It features a search bar with "Search" and "Clear" buttons, and a "Page size" dropdown set to "50". Below the search bar is a table with the following data:

Name	Id	Company	Creator	Created
Car insurance	p0249551	User Manual Company	Doe, John	22-Nov-04 10:17:09 AM
Fast food	p0249530	FIRM AS	Doe, John	22-Nov-04 09:57:57 AM

Figure 430: Active Projects

16.13 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 send 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 information from what the respondent has answered in 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 X-es 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/pXXXXXXXXX/login.asp>

UK server:

<https://survey.euro.confirmit.com/wi/pXXXXXXXXX/login.asp>

Where pXXXXXX is the project ID number of the panel.

The panelist will enter the address in a browser and the following Login page will be displayed. The panelists must 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/pXXXXXXXXX/login.asp>

Where pXXXXXX is the project ID number of the panel.

PANELIST LOGIN PAGE

This is the panelist login page



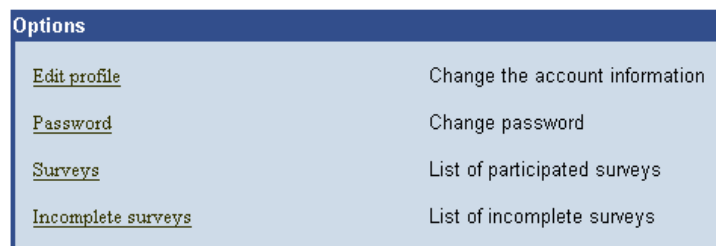
The login page features a blue header with the text "Please Log In". Below the header, a light blue box contains the instruction "Please type your user name and password to enter". There are two input fields: "User Name" and "Password". Below the input fields, there is an "OK" button. To the right of the button, it says "Powered by CONFIRMIT".

Figure 431: Example of a panelist Login page

When the panelist has provided the correct login information, the following page will be displayed, offering the panelist the opportunity to edit the profile, change the password, view the history of his/her surveys, and answer new and complete commenced, but not completed surveys.

WHAT DO YOU WANT TO DO TODAY?

Welcome, Axel Axelson. Please select an action.

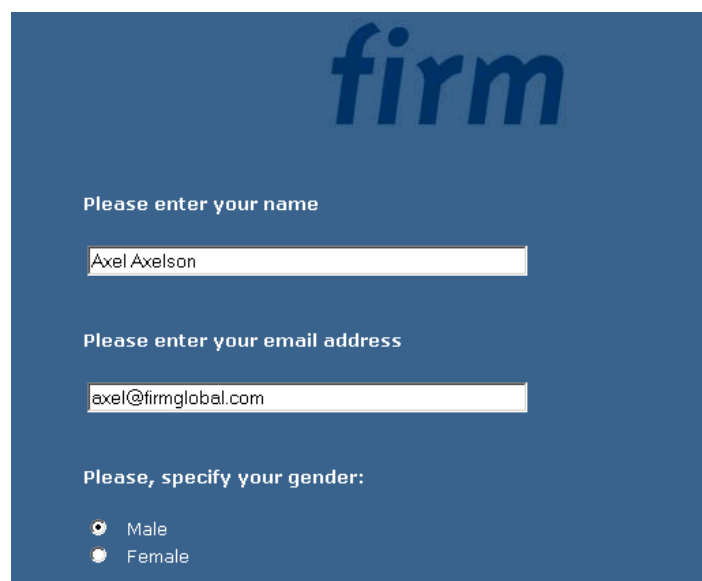


The options page has a blue header with the text "Options". Below the header, there is a table with four rows of options:

Edit profile	Change the account information
Password	Change password
Surveys	List of participated surveys
Incomplete surveys	List of incomplete surveys

Figure 432: Panelist 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.



The edit profile page has a blue background with the "firm" logo at the top. Below the logo, there are three sections for editing profile information:

- Please enter your name**: A text input field containing "Axel Axelson".
- Please enter your email address**: A text input field containing "axel@firmglobal.com".
- Please, specify your gender:**: Two radio buttons, one for "Male" (selected) and one for "Female".

Figure 433: Edit Profile Page

When the panelist clicks the *Change password* link, he/she will be brought to the following page:

CHANGE PASSWORD

Change password

Please enter the following

Old password	
New password	
Retype password	

OK Cancel

Powered by CONFIRMIT

Figure 434: Change Password Page

Here the panelist can change his/her password. The information is automatically updated in the panelist database.

The *History of surveys* link provides the panelist with an overview of the surveys in which he/she has participated.

SURVEY HISTORY

You have participated in the following surveys

History of surveys		
Name	ID	Date and Time
Panelist Project 2	p0033508	19.05.2001 12:25:44

Back

Figure 435: Survey History Page

The *Not completed surveys* link takes the panelist to an overview of the surveys in which he/she has not yet participated, or which he/she has commenced but not completed.

SURVEYS NOT COMPLETED

You have not participated in the following surveys

Incomplete surveys		
Name	ID	
Panelist Project 1	p0033256	Participate now!
Panelist Project 2	p0033508	Participate now!
Panelist Project 3	p0033601	Participate now!
Panelist Project 4	p0033677	Participate now!
Panelist Project 5	p0033751	Participate now!

Back

Figure 436: Surveys Not Completed Page

The panelist can enter in the surveys from his/her login page. Clicking the *Participate now* link will open the survey in a new window, allowing the panelist to participate.

17 Online Coding Tool

Note: For some customers, Online Coding Tool is a chargeable Add-On.

17.1 Why Have a Coding System?

The coding system is a tool for coding open-ended questions in order to give the answers precodes and code frames.

This system has been designed to enable coders to classify open-ended or "open-text" questions into categories, thereby having the ability to report on 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 on the following page, show how the answers can be used in reporting after having been recoded.

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 437: Respondents answers for the open-ended question before coding

Important Criteria

Which are the most important criteria for you when considering purchasing a new car?

	Important Criteria					
	Pos		Neg		Total	
Comfort	4	20.0%	16	80.0%	20	100.0%
Engine	3	15.0%	17	85.0%	20	100.0%
Stereo	2	10.0%	18	90.0%	20	100.0%
AC	2	10.0%	18	90.0%	20	100.0%
4WD	1	5.0%	19	95.0%	20	100.0%
Safety	9	45.0%	11	55.0%	20	100.0%
Other	8	40.0%	12	60.0%	20	100.0%

Figure 438: A Sample example

The sample table above was produced in reporting, using the recoded open-end answers as displayed in the table on the previous page. As you can see, the 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.

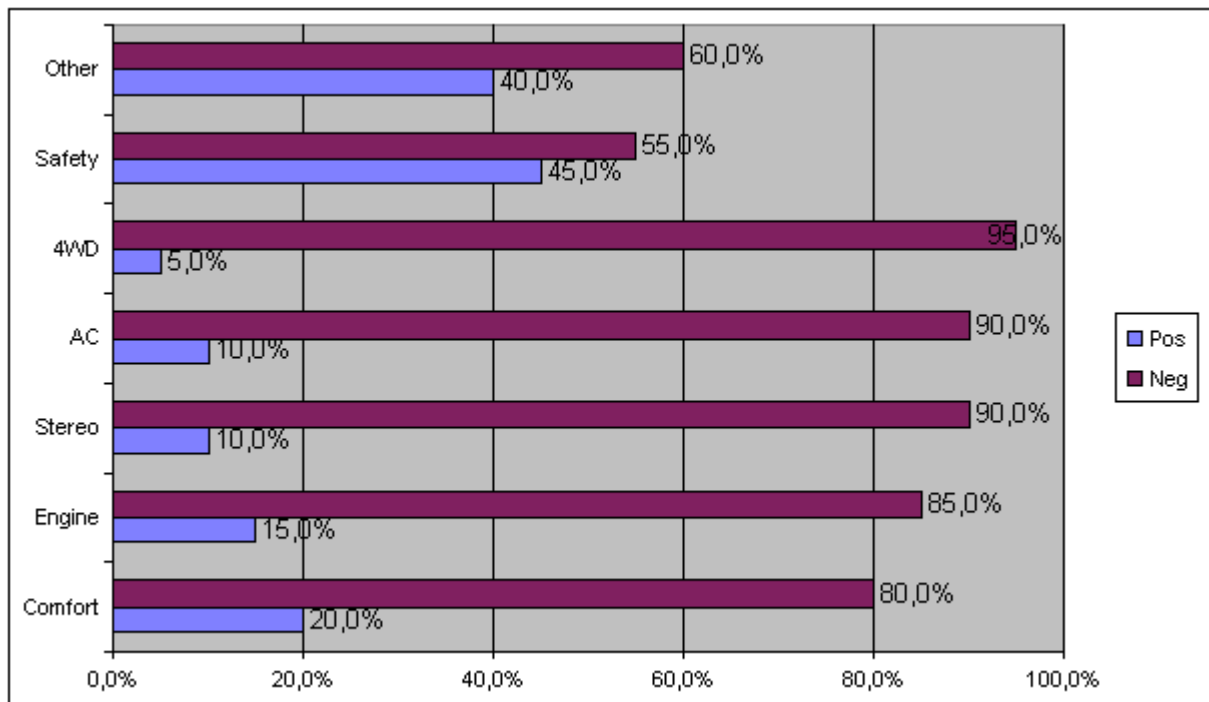


Figure 439: This Chart was produced using open-ended text answers after the online coding was complete

17.2 *Specification Summary*

This chapter provides a detailed overview of how the coding system of open-ended questions operates. The main features of the 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. This is explained in section 17.3 Entering Online Coding.
- 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. This part of the system is described in section 17.5 Locking the Questions for Coding.
- 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. The functionality of the coding system is described in section 17.6 Coding Window.

17.3 *Entering Online Coding*

17.3.1 Online Coding in Conformat Menu

To enter Online Coding module you have to choose a project and then click the menu item called "Online Coding" in Survey Data menu dropdown. When choosing this menu item the window described in section 17.5 Locking the Questions for Coding opens.

17.3.2 Online Coding Specific User Settings

Item 1: Coding screen size: This is the maximum number of answers, which 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, by entering the desired number and pressing update settings to save

Item 2: 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, by entering the desired number and pressing update settings to save.

Edit your personal settings
Confirm it

Personal settings for user

User name	user
User key	WKOMPTGCKDBEXHJUNXFXBIGV
First name	User
Last name	Manual
E-mail	usermanual@firmnglobal.com
Language	English
Display	1024 x 768
User level	Advanced
MS Office version	Newest version
Chart component	Excel
Coding Screen Size	15
Working set size	1000
Answerlist font	
Enable unicode NT/Win2000 only	☐
Password	[Change]

Figure 440: User Settings window

17.3.3 Object Permissions

The project administrator must define who will have the permission to code the open-ended questions. This is done in the Permissions window, found under Project Management > Overview. It will appear similar to the following image.

General Permissions Active Languages Project Status Url Setup

INFORMATION: Permission changes for other users will take effect at next login or within 5 minutes.

Customer Satisfaction Survey

User ID	Last Name	First Name	-	R	W	D	Administrate projects	Online coding administrate	Opentext coder
Users in company									
johndoe	Doe	John		☐	☐	☐	☒	☒	☐

Figure 441: Object Permissions

A user with Online coding administrate permission will be able to assign coders to questions and activate filters in Online Coding.

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. This is done in the same way as before, by dragging a new multi question to the routing of the project.

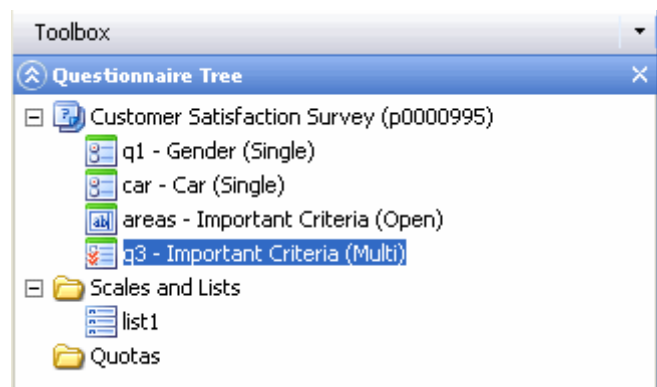


Figure 442: Multi question for online coding

This question works like other multi questions, that is, answer alternatives and corresponding precodes are to be defined in the Answers window for the question. This is shown in the window below. The example shows seven codes, but it is of course possible to define any number of codes.

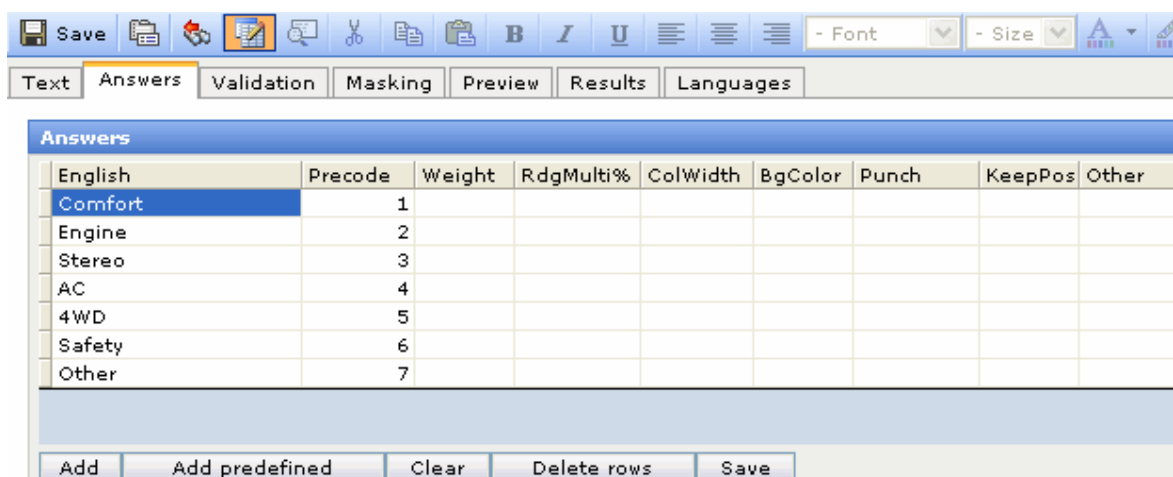


Figure 443: Defining precodes for online coding

Once the answer alternatives and precodes have been defined under the answer menu, select *Properties* in order to define which questions are to be linked. As you can see from the following figure, there are two new fields ("open text coding" and "coding of "). Select the "open text coding" field and the new field "coding of" will appear. It is in this field that the qID of the open-ended question is to be entered. In addition, remember to tick off hidden, in order to, hide the multi question from the respondent. This will now create a link to the chosen open-ended question.

Figure 444: Defining the multi question for online coding

Question (form) type	qID to be typed in the "coding of" field:	Remarks:
Open	qID	
Multi with "Open Text" checked off in <i>Properties</i>	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.

Table 38: Examples of defining multi questions for online coding

17.5 Locking the Questions for Coding

Before a coder can begin working on a specific open-ended question, the question must be locked from other coders, in order to avoid two people making changes to the same question; this will cause problems with the database. Therefore, a separate window where questions can be locked and unlocked is the first window that appears when starting the coding system. The window also displays the binding between the open-ended questions and the corresponding multi questions.

Whenever a coder locks a question in this window a hyperlink will be made to the coding window for that specific question. Only the coder who locked the question will see this hyperlink.

Multiple accesses of many users to one survey can be given, but only one coder at a time can work on a question.

The window for permissions and bindings will look different depending on if you are the administrator or if you are a coder. The administrator will be able to choose which coder is working on which question, as well as activate filters defined in Online reporting. Also, if a coder has chosen to lock a question that has the status "(none)", the name of the coder will automatically appear in the administrator window. The administrator window will look like this:

Online coding tool
Coding Administration, current database: test, current coder: johndoe, current filter(s): Female, Status (com...

Home Project Management Designer Translation Respondents Reporting End Users Survey Data

Exports Imports Edit Clear Data Online Coding Template Editor

[Filters] [Settings]

Open id	Multi id	Multi question title	Coder	Status
areas	q3	Important Criteria	(none)	27 of 27

Save

Figure 445: The administrator window

If you for example wish to code the answers given by a particular group of respondents only, 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, as well as all interview Statuses, will be displayed once you click the link Filters in Online Coding

Filtername	Active
Female	☐

Status

Complete
Incomplete
Screened
Quota full

>>
<<

Save

Figure 446: Filters

If you click on the Settings link, you will be brought to a page where you can define the separator of codes (comma or dot), when entering multiple codes for the same case.

Settings

Code Separator Comma

Comma
Dot

Save

Figure 447: Code separator

The coders will see a window like this:

Open id	Multi id	Multi question title	Locked by	Unlock	Status
areas	q3	Important Criteria	alexcarpenter	☐	27 of 27

Figure 448: The coder window

17.6 Coding Window

After a question has been locked, follow the hyperlink by clicking on the question, which is to be coded. A screen similar to the one below will appear.

The coding window is a window 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.

Coding Window, current database: test, current filter(s): p162517689

Current coder: kristinem

Question no	Question text	# WorkingSet	Current pos.
q1	Please, describe the most important criteria for you when considering purchasing a new car:	6	1

Save properties

☒ Keep empty fields uncoded

Search properties

☒ Coded ☒ Uncoded

Sort by: Response-ID
Ascending

Response ID	Answer text	Code	Code frame
	%		
2	Climate control inside the car	4	AC
3	Security issues	6	Safety
4	Exterior and interior design, security, sun-screen	1,4,6	Comfort,AC,Safety
5	Price level, security issues, design		
6	Engine power, fuel usage		
7	Exterior design		

Code frame

Code	Cod
1	Cor
2	Eng
3	Ste
4	AC
5	4W
6	Saf
7	Oth

Figure 449: The coding window

The <Enter> key on your keyboard will move the cursor to/will 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, and current position in the working set.

17.6.1.2 Searching and Sorting

The next section of the coding window is for "searching and sorting" answers.

Current coder: kristinem

Question no	Question text	# WorkingSet	Current pos.
q1	Please, describe the most important criteria for you when considering purchasing a new car:	2	1

Save properties

☒ Keep empty fields uncoded

Search properties

☒ Coded ☐ Uncoded

Sort by: Response-ID
Ascending

Response ID	Answer text	Code	Code frame
	%	4	
2	Climate control inside the car	4	AC
4	Exterior and interior design, security, sun-screen	1,4,6	Comfort,AC,Safety

Search

Figure 450: 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.

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: Enter the number of the code(s) to be searched. If searching for multiple codes, separate the codes with commas. Press go to begin search.

Once your working set is established, it may be sorted 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.

When all search criteria have been entered, click **Go** to activate the search.

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. As answers are coded, updates to the working set are made after the navigation or save button has been depressed; the coder will now only see the remaining un-coded answers.

Coding Window, current database: test, current filter(s): p162517689

Current coder: kristinem

Question no	Question text	# WorkingSet	Current pos.
q1	Please, describe the most important criteria for you when considering purchasing a new car:	6	1

Save properties

☒ Keep empty fields uncoded

Search properties

☒ Coded ☐ Uncoded

Sort by: Response-ID
Ascending

Response ID	Answer text	Code	Code frame
	%		
2	Climate control inside the car	4	AC
3	Security issues	6	Safety
4	Exterior and interior design, security, sun-screen	1,4,6	Comfort,AC,Safety
5	Price level, security issues, design		
6	Engine power, fuel usage		
7	Exterior design		

Search

Code frame

Code	Code
1	Cor
2	Eng
3	Ste
4	AC
5	4W
6	Saf
7	Oth

Figure 451: The remaining un-coded answers

The codes that have been added previously might be changed and 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 should be entered corresponding 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, as shown in the screen above.

If you choose the property Keep empty fields un-coded, the answers that have been shown in a working set, but have not been coded, will be displayed next time you search with the search property *un-coded*.

If you do not choose Keep empty fields un-coded, the answer will be counted as coded once displayed in a working set.

17.6.1.4 Navigation

The coder is able to navigate through the set of respondent answers in the current open-ended question, through use of the arrow buttons. The buttons in the image below show an example where the coder has chosen to have only 10 answers on the screen where he can then navigate back (<< prev 10), forward (next 10 >>), or to the beginning or end of the record set.



Figure 452: Navigation

The number of answers to be displayed in the coding window should be entered in the "coding screen size" field in the user-defined menu. This feature lets the coder determine how many answers he wants displayed on the screen.

Clicking on the navigation buttons will save data shown for the current displayed code. The save button should also be used to save codes when an interruption in the coding shall take place (Such as a break or upon completion of the coding).

17.6.1.5 Replace Function

The replace-function is similar to a global replace. It can be used to recode 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).

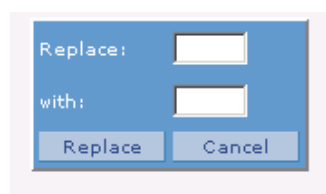


Figure 453: Replace function

Since this is an operation that replaces the codes and is IRREVERSIBLE, the replace function should be used with caution. The warning message below will appear showing how many codes will be affected. If the codes are correct, click ok to continue, otherwise press cancel to end the operation.

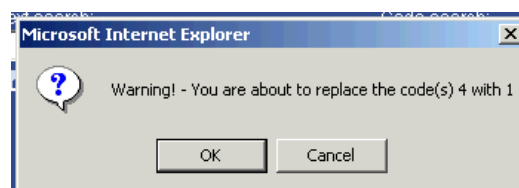


Figure 454: Warning

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 done.

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) select User Settings from the main menu and edit the default sizes. Press "Update User Settings" to implement the change. (Coder and Administrator)
2. Click on Object Permissions from the overview menu. 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. Next, open the properties window, and fill in the belonging open-ended question ID and also check off as "hidden". (Administrator only)
5. Recompile the project. (Make sure no other changes that can affect the respondent database are made before doing this).
6. Click the "Online Coding"-item from the main menu. (Coder and Administrator)
7. Lock the questions and choose which coders will work on which questions. (Administrator only)
8. Click on the hyperlink of the question you wish to begin coding. (Coder)
9. The coding window will now appear 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. After your search is complete and your working set established, coding of the open-ended questions can begin. (Coder)

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. See section 18.3.2 for further information.

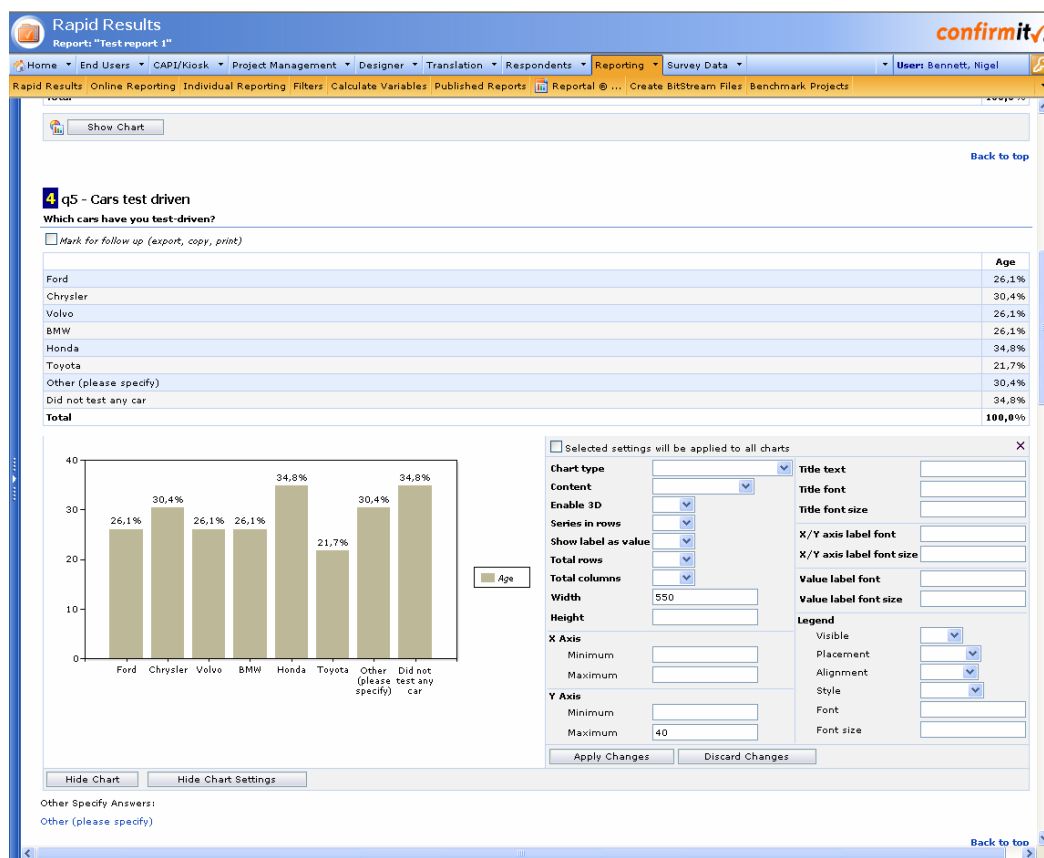


Figure 455: Example of the Rapid Results window layout

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

- 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 below.

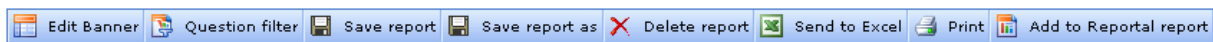


Figure 456: The Rapid Results menu bar

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.

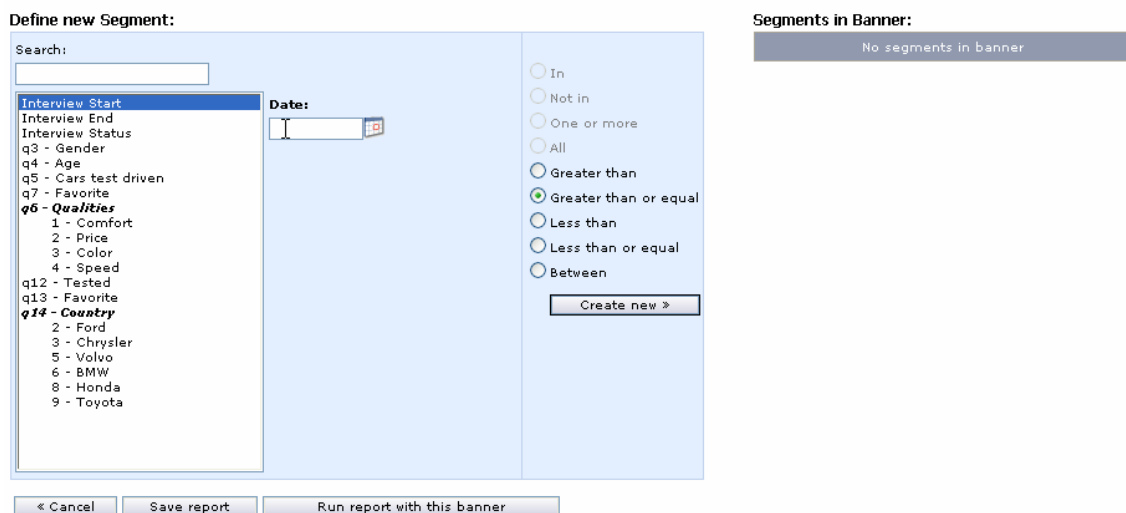


Figure 457: The Edit Banner window

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 centre 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 458: 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.

See section 18.3.1.2 for descriptions of the operators.

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 459: Example of a simple banner under creation

5. To remove an unwanted segment from the banner, click **Remove** for that segment.
In the figure below, the “Under 18”, “51-67” and “68 or older” segments have been removed.

Segments in Banner: [Clear banner](#)

▶ Add here Title: 18 to 30 Remove
▶ Add here Title: 31 to 50 Remove

Figure 460: 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.

Segment was created

Define new Segment:

Search:

Available questions:	Select one or more answers:	Operators:
Interview Start	[All]	☐ In
Interview End	Ford	☐ Not in
Interview Status	Chrysler	☒ One or more
q3 - Gender	Volvo	☐ All
q4 - Age	BMW	☐ Greater than
q5 - Cars test driven	Honda	☐ Greater than or equal
q7 - Favorite	Toyota	☐ Less than
q9 - Why	Other (please specify)	☐ Less than or equal
q6 - Qualities	Did not test any car	☐ Between
1 - Comfort		
2 - Price		
3 - Color		
4 - Speed		
q12 - Tested		
q13 - Favorite		
q14 - Country		
2 - Ford		
3 - Chrysler		
5 - Volvo		
6 - BMW		
8 - Honda		
9 - Toyota		

Segments in Banner: [Clear banner](#)

▼ Add here Title: Age Remove
q4 - Age answered as In Remove • 18 to 30 (2)

Create 1 new segment with 4 restrictions

Figure 461: Adding additional qualifiers to a segment

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.

The Details pane for the segment opens.

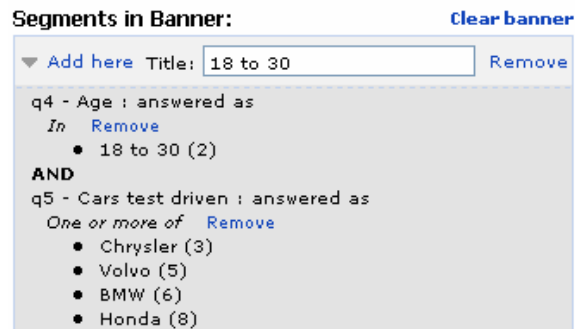


Figure 462: Example of the details pane for a segment with additional qualifier

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 463: 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.

- 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.

- Scroll through the report and check the **Mark for follow-up** check box for those questions that you wish to export to Excel.



Figure 464: The Mark for followup check box

- In the Rapid Results menu bar, click **Send to Excel**.

The Send to Excel window opens.

Note: You can click the button before you have selected the questions, and select them in the Send to Excel window.

All None

Available questions:

- q5 - Cars test driven
- q7 - Favorite
- q6 - Qualities - Comfort (1)
- q6 - Qualities - Price (2)
- q6 - Qualities - Speed (4)
- q13 - Favorite
- q14 - Country - Ford (2)
- q14 - Country - Chrysler (3)
- q14 - Country - Volvo (5)
- q14 - Country - BMW (6)
- q14 - Country - Honda (8)
- q14 - Country - Toyota (9)
- q4 - Age
- q9 - Why
- q6 - Qualities - Color (3)

>>

<<

All None

Selected questions:

- q3 - Gender
- q12 - Tested

☒ Display all questions in one worksheet

« Back to Report

Send to Excel

Figure 465: 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 shown below opens.

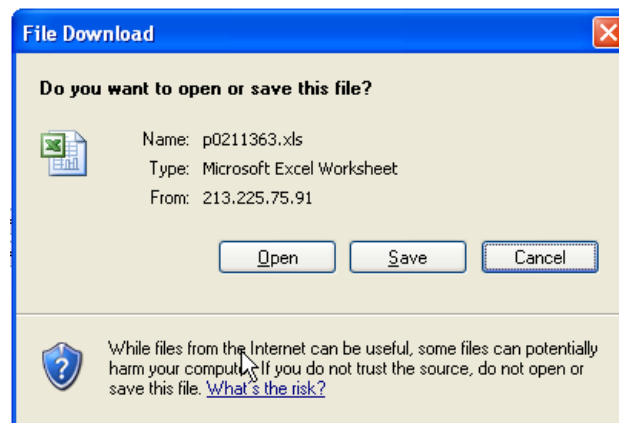


Figure 466: The File Download dialog box

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.

9. Scroll through the report and check the **Mark for follow-up** check box for those questions for which you wish to print to results.

10. In the Rapid Results menu bar, click **Print**.

The Export Report window opens.

All None All None

Available questions:

- q4 - Age
- q7 - Favorite
- q9 - Why
- q6 - Qualities - Comfort (1)
- q6 - Qualities - Price (2)
- q6 - Qualities - Color (3)
- q6 - Qualities - Speed (4)
- q12 - Tested
- q13 - Favorite
- q14 - Country - Ford (2)
- q14 - Country - Chrysler (3)
- q14 - Country - Volvo (5)
- q14 - Country - BMW (6)
- q14 - Country - Honda (8)
- q14 - Country - Toyota (9)

>> <<

Selected questions:

- q3 - Gender
- q5 - Cars test driven

☐ Print one table per page

Generate: Tables only

<< Back to Report View printer-friendly version

Figure 467: 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.

11. Using standard Windows techniques, select in the left column the questions for which you wish to print out the results.
12. 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.

13. 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.
14. Click the drop-down arrow beside the Generate field to open a list of the options available, and select the desired option.
15. Click **View printer-friendly version** to open a print preview window displaying the results as they will be printed.
16. Click **Print this page** or press the **Ctrl+P** keys on your keyboard to open a standard Print dialog box.
17. Make the appropriate selections, then click **Print** to send the page to the selected printer.
18. 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:

19. Scroll through the report and check the **Mark for follow-up** check box for those questions that you wish to copy to Reportal.
20. 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 468: 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.

21. Using standard Windows techniques, select in the left column the questions that you wish to copy to Reportal.
22. 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.
23. 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.
24. Select the desired options in the remaining data fields.
25. 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 469: 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:

- Click Update Rapid Results BitStream Files.

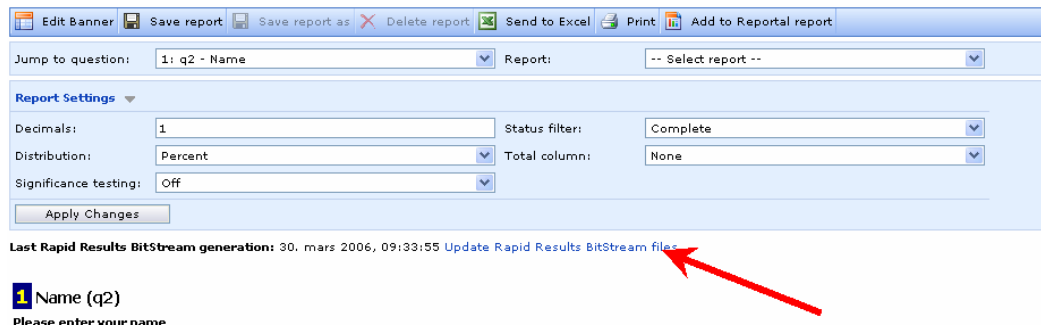


Figure 470: The Update BitStream Files link

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 Reports window first opens, the question result tables will be listed with the charts hidden.



Figure 471: An example of a question listed in Rapid Reports

To display the chart for a specific question, go to that question and click **Show Chart**.



Figure 472: 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, as below.

☐ Selected settings will be applied to all charts

Chart type		Title	
Distribution		Title font	
Enable 3D		Title font size	
Series in rows		X/Y axis label font	
Show label as value		X/Y axis label font size	
Show total		Value label font	
Width		Value label font size	
Height			
X Axis		Legend	
Minimum		Visible	
Maximum		Placement	
Y Axis		Alignment	
Minimum		Style	
Maximum		Font	
		Font size	

Apply Changes
Discard Changes

Figure 473: 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 Advanced Filter Designer

To define a filter, click on the Edit button in the upper right corner of the report. The Advanced Filter Designer window will be opened. 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.

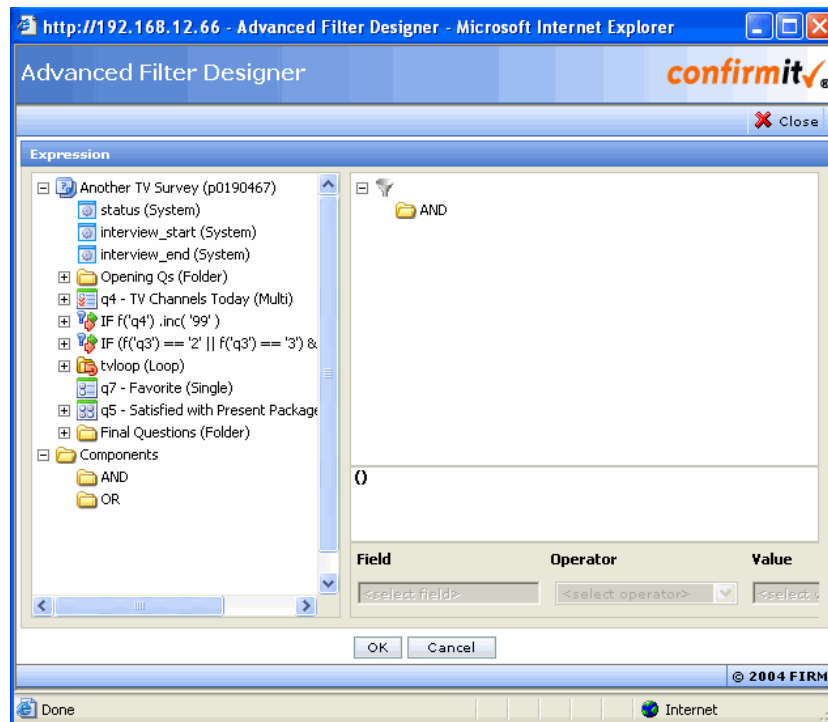


Figure 474: Advanced filter designer

To create a filter, drag the questions from questionnaire tree and drop them into the filter folders. You can have two types of relations between the elements in a filter: they can be linked with operator AND or with operator OR. These objects are available in the Components branch and they can be dragged to the filter branch. You can also define levels in advanced filters.

In the following example, we will show you how a filter is built on two single questions (Gender and Age), one multi question (TV Channels Today) and one grid question (Satisfied with Present Package).

We want to define the first level of the filter as follows: Male respondents under 51, and who have either EuroNews or BBC World. And on the second level, these respondents should be satisfied with News or Documentaries.

First, we drag the questions from questionnaire and drop them into the AND folder. To insert the first element into the folder, point at the folder icon when releasing the mouse button. To activate the Condition builder, click on the question. For single questions the operator will always be IN, and for multi questions the operators will be AND or OR.

In the figure above, the filters on questions q3 and q6 have already been defined.

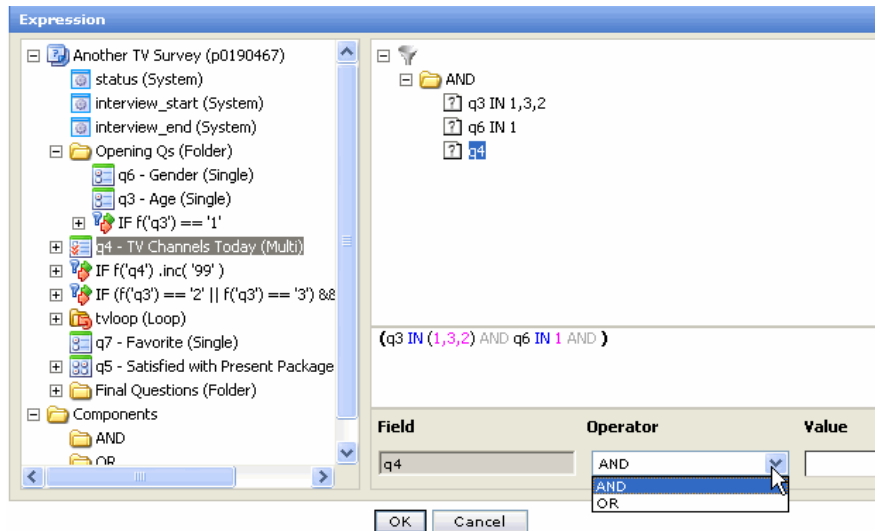


Figure 475: Questions in AND folder

To select the answer alternatives, click on the ellipses button. A new window will open, allowing you to choose the answer alternatives.

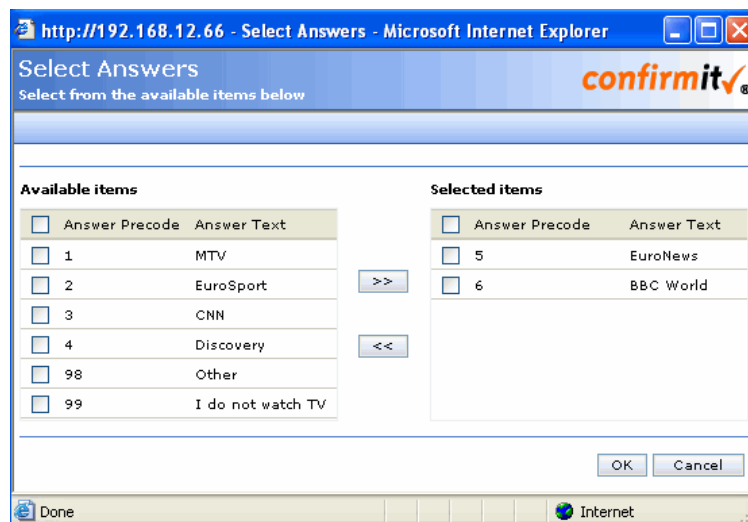


Figure 476: Selecting answer alternatives for a filter

Select the answer alternatives, move them to the Selected items column, and click OK. Observe that the changes have been implemented in the expression.

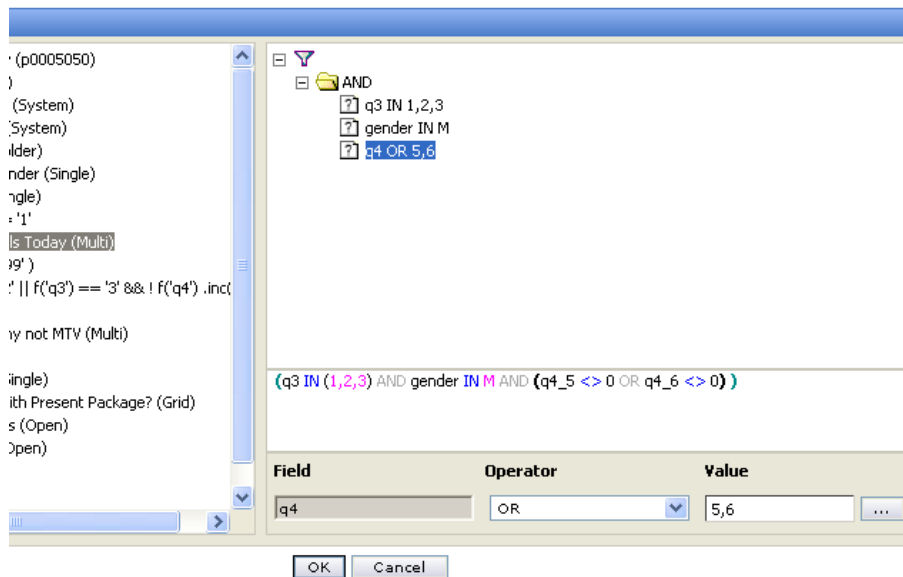


Figure 477: Filter on q4 updated

All three questions in the filter are linked together with operator AND. The two elements in q4 are linked together with OR.

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. In this folder, you then drag the q5 grid question from the questionnaire. Note that you cannot drag the entire grid question into the filter. You must expand the question by clicking on its icon.



Figure 478: An expanded grid question

Then, you can drag the single elements (answer alternatives) into the filter.

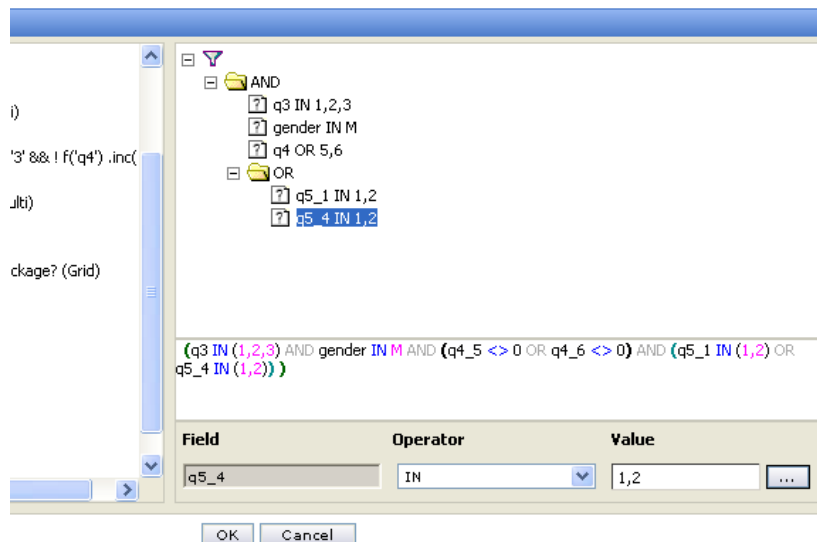


Figure 479: Filters defined on grid question

The logic in advanced filters can easily be inverted both on the elements and the folders. Inverting the logic means inserting NOT to get the opposite result. You can also switch between AND and OR folders.

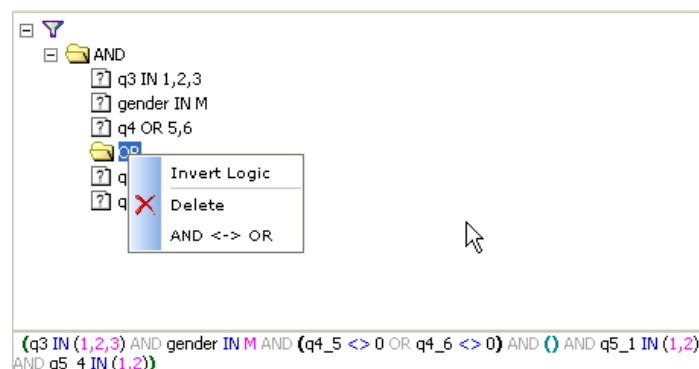


Figure 480: Invert logic

19.1.1 Operators for Open Text Numeric Questions, Interview Start and Interview End

19.1.1.1 Numeric Questions

When defining filters 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, and >= - greater than or equal to.

When defining a filter on an open text numeric question, you will have to enter the Value manually.

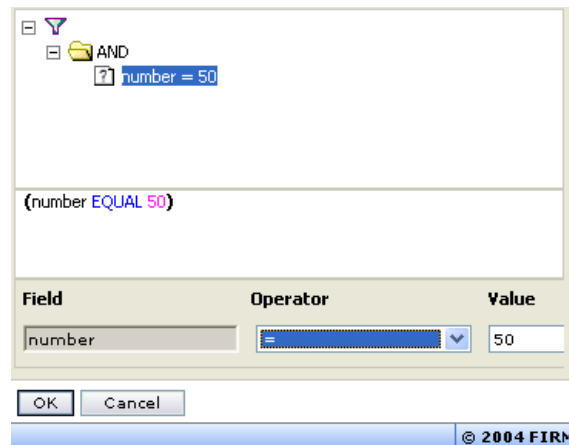


Figure 481: Filter on numeric question

Multi Open Text Numeric questions have to be expanded first, and the single items can then be dragged into the filter designer.

19.1.1.2 Interview Start and Interview End

For filters defined on Interview Start and Interview End, the operators are the same as for Numeric questions. Next to the Value field a calendar button will be displayed. To define the Value for the filter, click on the button and a calendar will pop up in a new window.

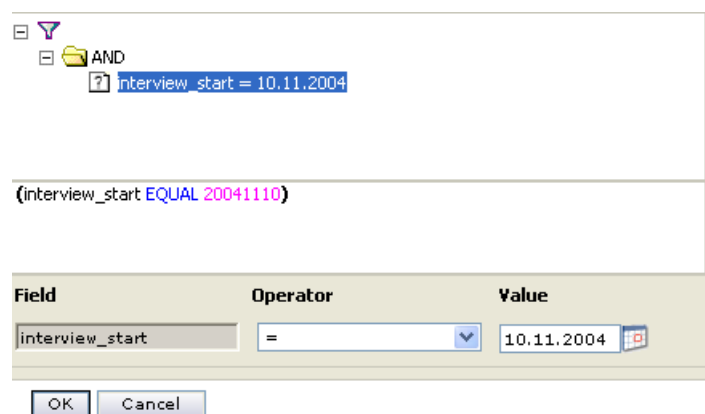


Figure 482: Defining filter on interview start

20 Aggregated Reporting

Note: For some of our customers, parts of the Reporting functionality (Advanced Reporting: Iterated Reporting, Pivot View, Individual Reporting (chapter 22 Individual Reporting)) will be subject to payment based on usage of selected functions.

A reporting module – Conformat Reportal – is available in Conformat. Conformat Reportal is a platform for creating and administrating online Report portals. For further information see the Reportal User Manual.

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 Conformat is accessed by clicking *Reports* in the main menu. Click on the *Online Reporting* and you will enter this screen:

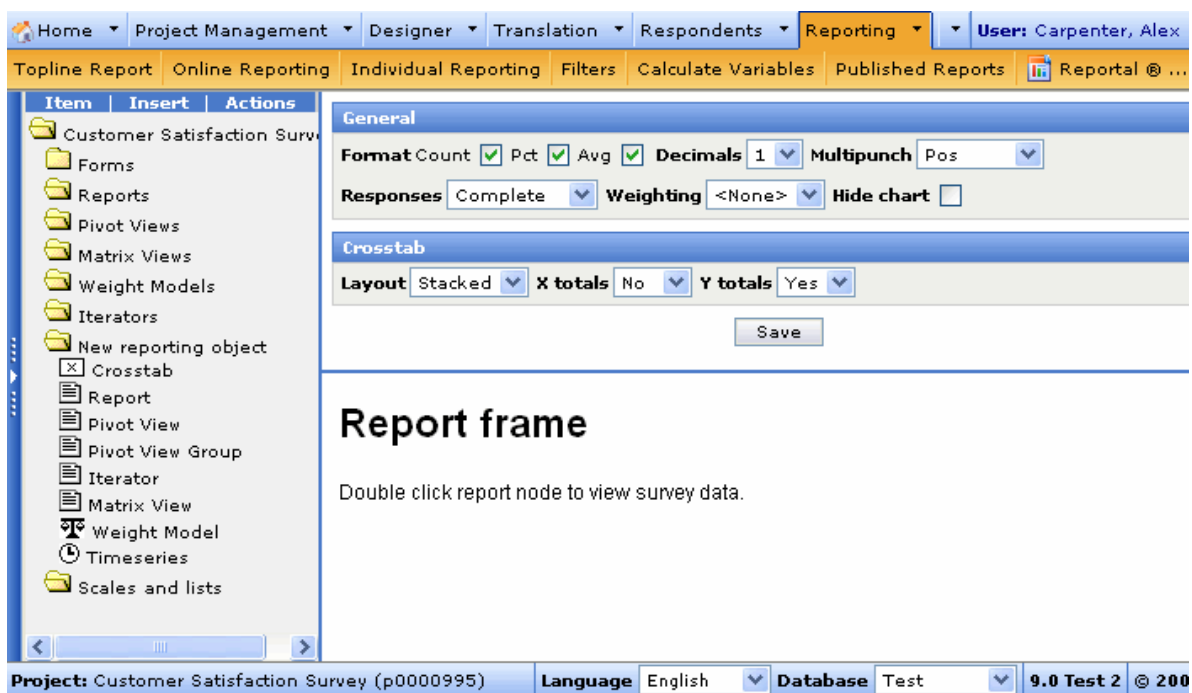


Figure 483: Initial reporting screen

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 may expand the report tree by right clicking the top-most folder in the report tree and choosing *Expand tree* option.

20.2 Checking a Single Question

The easiest way of checking the answers of a single question is by entering the “Form”-folder in the reporting tree:

1. Open the “Form”-folder. Single-click on the folder icon. This will show you the routing the same way as the “Routing”-folder in the questionnaire.
2. Locate the question. Since the subfolders, condition trees and loops are all initially closed; it is crucial to know something about the questionnaire routing to be able to find the question of interest.
3. Double click the question. When the question is double clicked, the results are shown in the bottom right frame as shown in Figure 486: Reporting a single question with Excel Chart Component.
4. Expanding the Other-specify fields. By clicking the icon of a form containing 'Other' answer alternatives, the form will be expanded. 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.
5. Expanding Grids. Single-click on the icon of a grid question to expand it. All the grid elements will be shown as single questions.

Age

Specify:

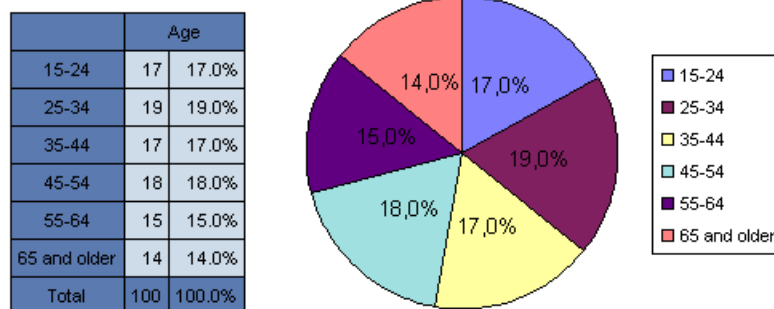


Figure 484: Reporting a single question with Excel Chart Component

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 you for example wish to put a summary row on a table of an Age question and subsequently filter on it, you have to add a new Single question in the questionnaire and make it into a recoded variable in Properties - Recoded var. For more information see chapter 21 Recoding Data.

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 recoded question would need the expression - `age == '1' || age == '2'` - written in the expression field. Actually in expression you may enter both SQL-code and Jscript-like code, since 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, e.g have to do this if you want to do calculations based on weights.)

After adding a recoded variable, you will always have to recompile the survey with either incremental or rebuild option. To calculate the values in the recoded variable, you will have to go to Online Reporting - Calculate variables. You can do this manually, as new respondents finish the survey, or you can set the variable calculation up as a recurring task.

Calculate variables

Click OK to calculate variables p0034792

Export properties

Project ID p0034792

Database Production

Respondents All
Uncalculated
Only New Respondents
but should be used when variable expressions are changed or interviewing is running and respondents are allowed to change their answers.

All Variables ☐

Variables
recoded_age - recoded age
recoded_year - recoded year

Start time ASAP

OK

Figure 485: Variable calculation

Confirmit users can choose whether to calculate all recoded variables or only some of them, and whether the calculation should be run for all respondents or only the new ones.

Field	Description
Database	Select database for which to calculate variables.
Respondents	Choose whether you want to calculate variables for All respondents, Uncalculated respondents, or Only New Respondents
All Variables	Check this box if you want to calculate all variables.
Variables	When All Variables box is unchecked, you will be able to choose some of the variables.
Start time	Select the start time for the batch job: ASAP, for later execution, or set it up as a recurring task.

Table 39: Variable calculation properties

Recoded variables may be used as normal questions in Online Reporting.

20.4 Building Reports

Within a project, all the reports are collected in the report folder. The idea of having more than one report is that you can prepare reports for different target groups and order exports (ppt/Excel files), as well as Publish reports separately. The following actions are possible to take at the report level:

- **Create a new report.** A new report is created by dragging a *New Report* object from the *New reporting objects* folder into the *Reports* folder.
- **Change name.** Select *Edit* → *Properties* in the report tree menu, or by right clicking on the report, and change the report name in the report frame.
- **Precode mask for reports.** You can select the answers (for a single or multi question) and the answers and scales (for a grid question) you want to be shown in the report. This masking can be executed for specified question forms in a report.
- **Filters on report level.** You can apply filters to whole reports.
- **Adding questions to the report.** Drag the form from the *Forms* folder and drop it at the right 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 right location within the report. See section 20.6 Building Crosstabs for details on building crosstabs.
- **Add time series to the report.** Drag a *New timeseries* object into the report, for example within a crosstab. Select the *New timeseries*, and then go to *Edit* → *Properties* from the report tree menu, or by right clicking the timeseries object. Afterwards configure the time series with granularity and start/end points.
- **Delete.** Highlight the object, select *Edit* → *Delete* in the report tree menu. Can be applied to both, individual questions/crosstabs and to whole report folders. You can also highlight the object and press the Delete button on keyboard, or you can right click the object and choose *Delete* from the menu.
- **Duplicate.** Select *Edit* → *Duplicate* in the report tree menu, or right click the object and select *Duplicate* from the menu.

Showing the whole report. Select *Actions* → *Show Report* from the report tree menu, or right click the report and choose *Show* from the menu. This will display the whole report in the report frame.

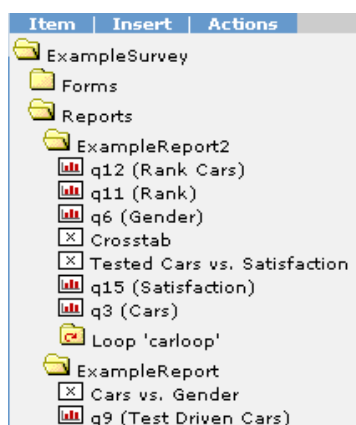


Figure 486: Project with two reports

20.5 Order report

Highlight a report, select *Actions-Order Report* from the report tree menu, or right click the report and choose *Order* from the menu, and you will be presented with the following screen:

Report export

Export predefined reports to MS Office. p60357900

Export properties

Project ID p60357900

Report name ExampleReport

Report iterations Development & Support
Sales & Marketing

PPT template 2003_template

Export files MS Excel and MS Powerpoint

Database Test

Language English

OLE in PPT ☐

Recipient email usermanual@firmglobal.com

Comment

Start time ASAP

Override email options ☐

OK

Figure 487: Report Export

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.

Field	Description
Project ID	The system generated project number will be displayed.
Report name	The report name will be displayed.
PPT template	Here you can choose a PPT template you wish to apply to your report.
Export files	Here you can choose whether you wish to export to either MS Excel, MS PowerPoint or to both.
Database	Here you can specify what kind of data you wish to export: Test or Production data.
Language	Here you can choose the language you wish the report to be exported to. Remember that this choice must correspond with 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	Here you can specify the recipients email address.
Comment	Here you can enter a comment for your batch job.
Start time	You can 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, gives you gives you possibility to override the standard export email options and customize both the subject and the email that will be sent to the export recipient (see picture below).
File transfer	Only available/displayed to users with Data Transfer Encryption (see section 1.4.3 Data Transfer Encryption and FTP). The user may choose to either 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, and then decrypt it with the private encryption key.
Encrypt file	Only available/displyed to users with Data Transfer Encryption (see section 1.4.3 Data Transfer Encryption and FTP). The file will be encrypted.

Table 40: Report Export

Override email options ☒

Mail format MIME Encoded

Mail encoding Western European (ISO)

Send as HTML ☐

Sender project_manager@firm.no

Subject S Excel and PPT reports from our project

Body Dear Project Manager,
Attached you will find.....

OK

Figure 488: 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 Building Crosstabs

When a new crosstab is created within a report, the crosstab object includes two subfolders:

- The “Crosstab...”-folder where the vertical questions of the crosstab can be included (cars in Figure 490). This is done by dropping questions within the folder.

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 489: Crosstab Table

- The “With...”-folder where the horizontal questions of the crosstab can be included (gender in Figure 490). This is done by dropping questions within the folder.

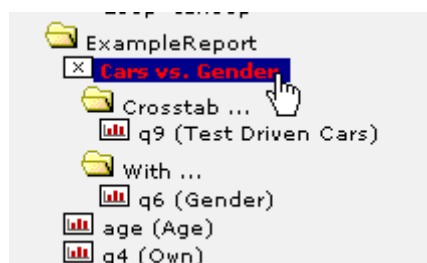


Figure 490: Crosstab: Cars vs. Gender

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.

5. Go to **Product Management > Launch Survey**.
6. Choose one of the Generate database options and click **Launch Survey**.
7. 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 by entering the “Form”-folder in the reporting tree:

- **Open the “Form”-folder.** Single-click on the folder icon. This will show you the routing the same way as the “Routing”-folder in the questionnaire.
- **Locate the Loop.** Since the subfolders, 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.
- **Single-click the Loop folder.** When the Loop is single-clicked, the questions the Loop contains will appear. When you double-click on each question, the results will be shown for all iterations.

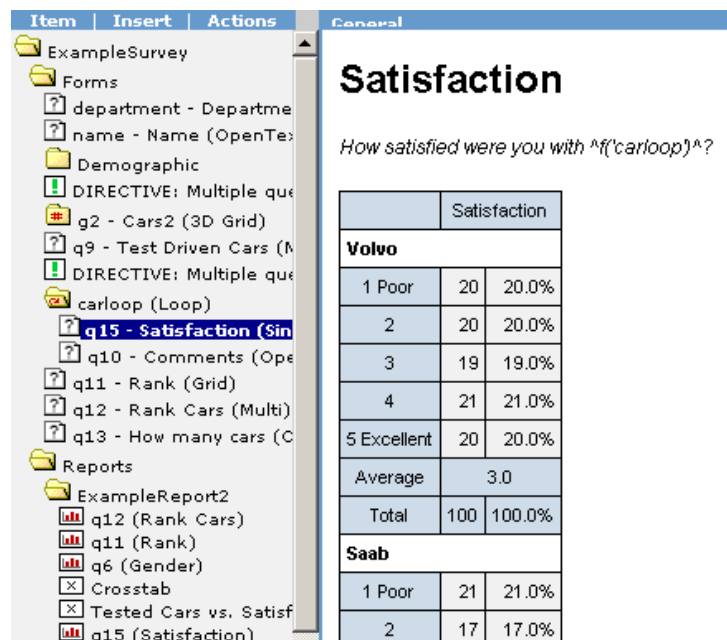
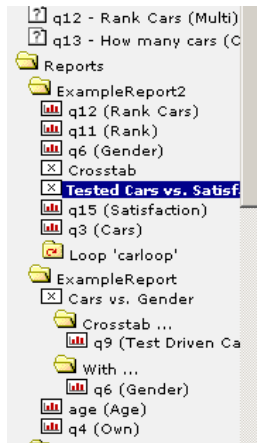


Figure 491: Showing results for loop question

- **Adding loops to reports.** You can add a loop question to the report by drag and drop method. You single-click the loop folder in *Forms*, and all the questions in the loop will appear. Select the question you wish to report on, and drop it into the *Report* folder.
- **Loops in crosstabs.** You may 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 you may do it vice versa.



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 492: Loop in crosstab

For more detailed information on how to edit reporting elements of loops, see section 20.11.2 Report Elements Settings.

20.8 Weight Model

Confirmit enables you to create weight models that can be applied to your reports in Online Reporting and in Reportal. Four separate types of weight models may be used.

Weight Model Type	Description
Sample balancing	Used for weighing 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 calculations are required.
Cell matching - percentage	Used for weighing 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.
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 gives 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.

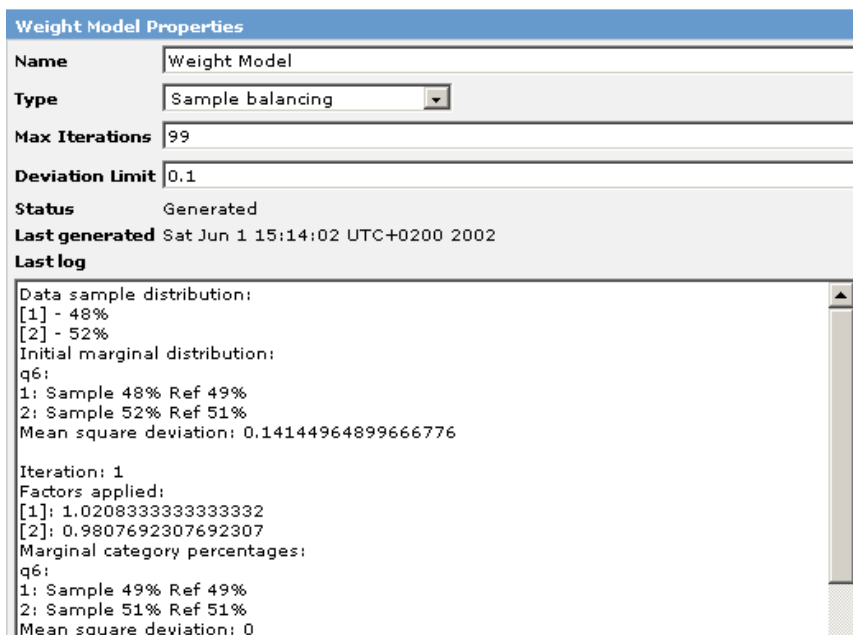
Table 41: Weight Model

To create a new weight model:

1. Go to the **Reporting > Online Reporting** menu command.
The Online Reporting window opens.
2. In the hierarchy column, drag the new **Weight Model** object into the **Weight Models** folder.
3. To edit the new object, double-click it or right click it and choose **Properties** from the menu.

The percentages for the cell matching methods are entered from this property screen.

Drag and drop the associated questions into the new weight model. For "sample balancing" (default), double click the individual questions in the weight model folder to set their percentages.



Weight Model Properties

Name Weight Model

Type Sample balancing

Max Iterations 99

Deviation Limit 0.1

Status Generated

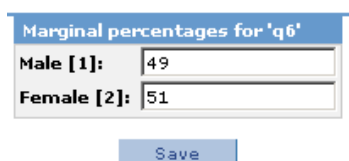
Last generated Sat Jun 1 15:14:02 UTC+0200 2002

Last log

Data sample distribution:
[1] - 48%
[2] - 52%
Initial marginal distribution:
q6:
1: Sample 48% Ref 49%
2: Sample 52% Ref 51%
Mean square deviation: 0.14144964899666776

Iteration: 1
Factors applied:
[1]: 1.0208333333333332
[2]: 0.9807692307692307
Marginal category percentages:
q6:
1: Sample 49% Ref 49%
2: Sample 51% Ref 51%
Mean square deviation: 0

Figure 493: Weight model properties



Marginal percentages for 'q6'

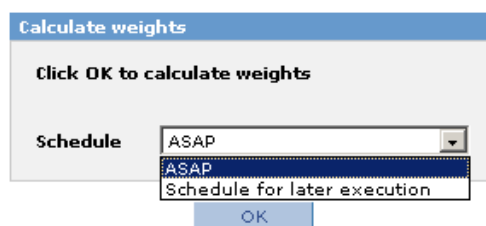
Male [1]: 49

Female [2]: 51

Save

Figure 494: Percentages

Respondent weights are calculated when the user selects [Action => Calculate weights] after first having activated the weight model folder. You may either calculate weights ASAP or schedule the task for later execution, as well as set it up as a recurring task.



Calculate weights

Click OK to calculate weights

Schedule ASAP

ASAP
Schedule for later execution

OK

Figure 495: Weight calculation

Weight models may be applied to report folders and/or as a general report option. Report folder model overrides 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 Weighting Different Sub-samples Separately

In continuous surveys where you report on different time periods (for example week, month, quarter or year) you may want to weigh 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, say that you are weighting on age and gender to match the distribution below:

Weight Model Properties

Name: Weight Model 1
 Id: wm1
 Type: Cell matching - percentage
 First question fixed: ☒
 Status: Modified since last generation

Percentages (should total to 100)

Gender	Age	Percentages
Male [M]	Under 18 [1]	0
	18 to 30 [2]	16.2
	31 to 50 [3]	15.4
	51 to 67 [4]	13.2
	68 or more [5]	4.9
Female [F]	Under 18 [1]	0
	18 to 30 [2]	16.1
	31 to 50 [3]	15.5
	51 to 67 [4]	13.3
	68 or more [5]	5.4

Figure 496: Distribution targets

Note: Under 18s are screened in the example survey.

When reporting on this survey, we will be looking at results per month. In the survey there is a "month" question where the month of the response is set. This question will be used to indicate the sub samples to which the weighting should be applied. We want to apply weights to achieve the same distribution on gender and age for each month.

Text-Mode Wysiwyg Html

Delete Add Add Predefined Add Group H

	Precode
☐ English	
☐ Jan 2006	1
☐ Feb 2006	2
☐ March 2006	3
☐ April 2006	4
☐ May 2006	5
☐ June 2006	6
☐ July 2006	7
☐ Aug 2006	8
☐ Sep 2006	9

Figure 497: Extract from the answerlist of the month question

In the weight model, month will then have to be included as the first object:

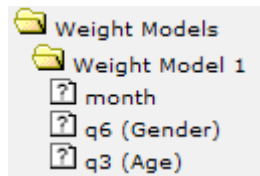


Figure 498: Weight model

In weight model properties, the "First question fixed" property is set (see Figure 496: Distribution targets). 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.

Selected precodes for 'month'	
Jan 2006 [1]:	☐
Feb 2006 [2]:	☐
March 2006 [3]:	☐
April 2006 [4]:	☐
May 2006 [5]:	☐
June 2006 [6]:	☐
July 2006 [7]:	☐
Aug 2006 [8]:	☐
Sep 2006 [9]:	☐
Oct 2006 [10]:	☐
Nov 2006 [11]:	☐
Dec 2006 [12]:	☐

Save

Figure 499: 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.

Calculate weights

Click OK to calculate weights

Fixed filter

All Precodes

All Precodes
Only Specific Precodes
Only New Precodes

All Precodes
Weights are calculated for all the selected precodes from the first question.

Schedule

ASAP

OK

Figure 500: Select which precodes to calculate weights for in the "fixed question"

20.9 Time Series

Use time series to create trend reports.

1. Drag a 'New timeseries' object into the report, for example within a crosstab.
2. Select the new time series and select 'Edit->Properties' from the report menu, or right click the object and select *Properties* from the menu.
3. Configure the time series with granularity and start/end points (day, week, month, quarter, year).

Timeseries Properties

From 1 Jun 2002

To 1 Sep 2002

Granularity Month

Save

Figure 501: Time series properties

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 502: Timeseries Crosstab

20.10 Filters

20.10.1 Defining Filters

There are two ways how to define filters. You can either do it in Online reporting, in the reporting tree, or you can do it by clicking on the link *Filters* under *Reporting*.

When defining Filters in the reporting tree, you may do the following:

1. Select the question to be used as filter within the “Form”-folder.
2. *Actions* → *Add Filter* from the menu above the reporting tree.
3. Enter the filter name (for example Male).
4. Select the precodes to let through the filter (e. g. the male precode if only male respondents are to be counted).

The screenshot shows a dialog box titled "Add new filter in test database" with a light blue header and a grey footer containing the identifier "p0001001". The main area is white and contains a section titled "Filter question" with a blue header. Below this, there is a label "Filtername" followed by a text input field containing the word "Male". At the bottom of the dialog is a blue button labeled "Next >".

Figure 503: Add New Filter

The screenshot shows a dialog box titled "Define filter in test database" with a light blue header and a grey footer containing the identifier "p0001001". The main area is white and contains a section titled "Filter" with a blue header. Below this, there is a label "Filter" followed by a text input field containing the word "Male". Below that is a label "Form/Variable" followed by the text "q6 (Specify:)". Below this is a table with two columns: "Element" and "Use". The table has two rows: "1 (Male)" with a checked checkbox, and "2 (Female)" with an unchecked checkbox. At the bottom of the dialog is a blue button labeled "Save".

Figure 504: Filter definition1

When defining Filters under *Confirmit Reports* menu, you may do the following:

1. Select the project, and click *Reports* link in *Confirmit* menu.
2. Under *Reports* click *Filters* link, and you will be brought to the following screen. (Depending on whether you have previously defined any filters, the picture may vary. The following one has an earlier defined filter):

List of filters in test database

Select global filters for reporting by marking them as active p0001001

Filtername	Active	Delete
Male	☒	☐

New

Save

Delete

Figure 505: Filter Definition 2

- To add a new filter, click *Add* button, and the following picture containing questions that may be used for filters, will be displayed:

Add new filter in test database

p0001001

Filter question

Name

Filter question

age - Age

age - Age

carloop - Carloop

department - Department

q11 - Rank

q12 - Rank Cars

q15 - Satisfaction

q3 - Cars

q4 - Own

q5 - Rank

q6 - Gender

q9 - Test Driven Cars

Figure 506: Adding New Filter

- Give the new filter a name; select the question that will be used for filtering (see picture above), and click OK. The following picture will be displayed:

Define filter in test database

Edit name and/or answer alternatives for the filter.
p0001001

Filter

Filter

Young

Form/Variable age (Specify:)

Element	Use
1 (15-24)	☒
2 (25-34)	☒
3 (35-44)	☒
4 (45-54)	☐
5 (55-64)	☐
6 (65 and older)	☐

Save

Figure 507: Editing Answer Alternatives

- Choose the answer alternatives for the filter, and click Save. You will be brought back to the list of filters page, where you can activate the filters.

If you activate the filters in the list of filters, they will be applied to globally to all reports. If you do not activate the filters in the list, you may apply them to reports on report level and on report element level.

List of filters in test database

Select global filters for reporting by marking them as active
p0001001

Filtername	Active	Delete
Male	☐	☐
Young	☐	☐

New

Save

Delete

Figure 508: List of Filters

20.10.2 Defining Filters for Multi Questions

The previous filter examples were based on single questions. If you choose a Multi question for a filter, you will be brought to the screen shown in the next picture. If the Multi question is an ordinary Multi question, and you for example want to see results only for respondents who have either answered Ferrari or Fiat, you simply tick the checkboxes for these answer alternatives in the *Use* column, and ignore the *Operator* and *Value* columns.

Define filter in test database

Edit name and/or answer alternatives for the filter. p0001001

Filter			
Filter	Italian Cars		
Form/Variable	q9 (Which cars have you test driven?)		
Element	Use	Operator	Value
q9_1 (Volvo)	☐	<>	0
q9_2 (Saab)	☐	<>	0
q9_3 (BMW)	☐	<>	0
q9_4 (Audi)	☐	<>	0
q9_5 (Ferrari)	☒	<>	0
q9_6 (Fiat)	☒	<>	0
Save			

Figure 509: Editing Answers for a Multi Question Filter

However, if the Multi question you are using for the filter is an Ordered Multi question, you will have to specify which answer alternatives you want to use for the filter, as well as which rank values should be filtered on.

Define filter in test database

Edit name and/or answer alternatives for the filter. p0001001

Filter			
Filter	1 or 2 for Swedish		
Form/Variable	q12 (Please rank the cars as to which one would be the most desirable to buy?)		
Element	Use	Operator	Value
q12_1 (Volvo)	☒	<	3
q12_2 (Saab)	☒	<	3
q12_3 (BMW)	☐	<>	0
q12_4 (Audi)	☐	<>	0
q12_5 (Ferrari)	☐	<>	0
q12_6 (Fiat)	☐	<>	0
Save			

Figure 510: Editing Answers for an Ordered Multi Question Filter

In the above example we want to see results only for respondents who have ranked Volvo and Saab as the first two most desirable cars to buy.

20.10.3 Defining Filters For Grid Questions

If you choose a Grid question for a filter, first, you will have to choose the variable you want to use in the filter as shown in the next picture.

Add new filter: Step 2

p0001001

Select the grid element to filter by

Grid element
q5_1 (Volvo)
q5_2 (Saab)
q5_3 (BMW)
q5_4 (Audi)
q5_5 (Ferrari)
q5_6 (Fiat)

Next >

Figure 511: Defining Filter On a Grid Question

In the next step you will be able to choose which scale element should be applied in this filter.

Define filter in test database

Edit name and/or answer alternatives for the filter.

p0001001

Filter	
Filter	Ferrari
Form/Variable	q5 (Evaluate the cars:)
Grid element	Ferrari
Element	Use
1 (Unsatisfactory 1)	☐
2 (2)	☐
3 (3)	☐
4 (4)	☒
5 (Excellent 5)	☒

Save

Figure 512: Editing Answers for a Grid Question

20.10.4 Applying Filters

Filters can be added globally, on report level, or on the report element level.

- **Global filters:** Select *Online Reporting* → *Define filters* from the main Confirmit menu. Then check the correct filter in the list. These filters will be applied to all reports.
- **Report level filters:** Select the report, and apply the filter.
- **Element level filters:** See Filter options in section 20.11.2.3 Filter Options

20.11 Settings

20.11.1 General Settings

The settings frame in the reporting screen includes the following general settings for the whole reporting environment. Every time you make any changes in the General Settings you have to click the *Refresh* button in order to update the settings.

The screenshot shows a 'General' settings panel with the following controls:

- Format:** Checkboxes for Count, Pct, and Avg are all checked. 'Decimals' is set to 1. 'Multipunch' is set to Pos.
- Responses:** Set to Complete. 'Weighting' is set to <None>. 'Hide chart' is unchecked.
- Crosstab:** 'Layout' is set to Stacked. 'X totals' is set to No. 'Y totals' is set to Yes.

A 'Save' button is located at the bottom center of the panel.

Figure 513: General settings frame

Setting	Setting description
General	
Format	Indicates whether count, percent, and/or average should be displayed. Average can only be displayed for weighted single punch or grid questions. See section 7.2.3.3 Answers for how to give values/weights to a question.
Decimals	Number of decimals to use 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 p Pos + Neg: Show numbers of positive and negative answers for a Multi q Ordered: Shows an or
Weighting	<None> or one of the defined Weight models
Hide chart	Use this check box to show only tables in the report frame.
Crosstab	
Layout	Stacked: The questions Nested: The questions
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.

Table 42: General settings options

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 514: 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 515: Nested Crosstab

20.11.2 Report Elements Settings

All of the general settings can be overridden by setting properties for each single element within a report. The element would be a crosstab or a simple question within the report. This is done by selecting a report element, single-clicking on it, and then choosing *Edit* → *Properties* in the above the tree structure menu, or right click the element and choose *Properties* from the menu. From this menu point, you can also set the following properties that are not available from the general settings.

20.11.2.1 Excel Chart Component

The following screenshots will be available for you if you choose Excel as the chart component in user settings. (See section 4.14 User Settings).

Report node options						
General	Chart	Ppt	Publisher	Filter	Masks	Save
General options						
Format	☒ Global setting ☐ Count ☐ Percent ☐ Average					
Averages	☒ Collapse in tables ☒ Include base					
Display	☒ Categorized					
Decimals	Global setting					
Multipunch	Global setting					
Ranking						

Figure 516: General Report Node Options

Report node options						
General	Chart	Ppt	Publisher	Filter	Masks	Save
Chart options						
Chart type:	Use default					
Chart subtype: (3D only available in exports)						
	Border Color	Border Linestyle	Interior Color			
Chart	Automatic	Automatic	Automatic			
Plot Area		Automatic				
Legend	Automatic	Automatic	Automatic			
Chart content	Use Default					
Min Scale						
Max Scale						
☐ Series in rows	☒ Series has values	☒ Show Legend				
☐ Excel chart has table	☐ Hide chart (Online reporting)					
☐ Categories in reverse order	☐ Values in reverse order					

Figure 517: Chart options for Excel Chart Component

General Options					
Setting	Description				
Collapse in tables	Only for average: Shows the number of respondents together with the average. Normally used together with <i>Include base</i> to get the wanted effect. <table border="1"> <tr> <td></td><td>Single</td></tr> <tr> <td>Single</td><td>2.0 [n=50]</td></tr> </table>		Single	Single	2.0 [n=50]
	Single				
Single	2.0 [n=50]				

Include base	Only for average: Includes the number of respondents in addition to the average. Normally used together with <i>Collapse in tables</i> to get the wanted effect. <i>Include base</i> makes the n=50 to be displayed (see the picture above).
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.
Ranking	You may choose in which order to display table elements based on their frequency.
Deleted	Will hide the node from the report.

Chart Options Excel Component	
Setting	Description
Type	Defines the chart type to be used. The most normal chart types like bars, pies, lines and areas are supported among some other.
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 in order 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. See section 7.2.3.3 Answers for how to weigh a question.
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	If you check off for this option, the categories in the chart will be shown in reverse order as 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)	Use this check box to hide the charts in the report frame.
Values in reverse order	The values in the chart, i.e. count, percent or average, will be shown downwards and not upwards.
Show legend	You may choose whether you wish the legend to be displayed in the chart.

Table 43: Excel chart component options

20.11.2.2 PowerPoint Options

Power Point options can be edited in all project languages simultaneously. When you order a report, it will arrive in the language you have specified in your *User Settings*.

If you have edited Report Publisher options prior to editing Power Point options, you can easily copy Publisher Header texts and Texts into your Power Point presentation by clicking *Copy Publisher texts* button.

Report node options

General Chart **Ppt** Publisher Filter Masks Save

Power Point options

Object type Chart

Slide layout Only object

English

Title

Text

Norwegian

Title

Text

Figure 518: PowerPoint options

PowerPoint options	
Settings	Description
Header text	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.
Object type	Used to choose between table and chart as the PowerPoint object.
Slide layout	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. Only text: Only text is shown in the PowerPoint slide. Only object: Only object is shown in the PowerPoint slide.

Table 44: PowerPoint options

20.11.2.3 Filter Options

Report node options

General Chart Ppt Publisher **Filter** Masks Save

Filter options

Active filters in test database

☐ Male

☐ Young

☐ Italian Cars

☐ 1 or 2 for Swedish

☐ Ferrari

Figure 519: Filter options

Filter options	
Setting	Description
Active filter	It is possible to set any of the defined filters active for one report element.

Table 45: Filter options

20.11.2.4 Answer Mask/Scale Mask

Report node options

General | Chart | Ppt | Publisher | Filter | **Masks** | Save

Answer mask

☒ Show all answers
Show these answers:
☐ Volvo ☐ Saab ☐ BMW ☐ Audi ☐ Ferrari ☐ Fiat

Scale mask

☐ Show average ☐ Show best ☐ Show worst
☒ Show all answers
Show these answers:
☐ Poor ☐ 2 ☐ 3 ☐ 4 ☐ 5 ☐ Excellent

Figure 520: Answer Mask/Scale Mask

Answer mask/Scale mask	
Setting	Description
Show average	Choose this to show the average values of the variables. The answers/scales have to be assigned values to as described in section 7.2.3.3 Answers.
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 <i>Weight</i> as worst and the highest as best. Leave all other checkboxes empty when using <i>Show best</i> .
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 <i>Weight</i> as worst and the highest as best. Leave all other checkboxes empty when using <i>Show worst</i> .
Show all answers	All answers/scales are shown in the table/chart.
Show these answers	You may check off specific answers/scales you want to be shown in the table/chart.

Table 46: Answer mask/Scale mask options

20.11.2.5 Crosstab Options

Report node options

General | Chart | **Crosstab** | Ppt | Publisher | Filter | Save

Crosstab options

Layout **X Totals** **Y Totals**
Global setting ▼ Global setting ▼ Global setting ▼

☐ Table content is average of first node

Figure 521: Crosstab options

Crosstab options	
Setting	Description
Layout	Stacked: The questions in the “With...”-folder are stacked. 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 table.
Y totals	Set this to “ Yes” to get the totals for a question under answer alternatives.
Table content is average of first node	The contents are the average values of the first question in the <i>Crosstab....</i> folder. The variable must be weighed to get average values.

Table 47: Crosstab options

20.11.2.6 Loop Options

Report node options

General Chart Ppt Publisher Filter Masks Save

Answer mask

☐ Show average ☐ Show best ☐ Show worst

☒ Show all answers

Show these answers:

☐ Volvo ☐ Saab ☐ BMW ☐ Audi ☐ Ferrari ☐ Fiat

Figure 522: Loop options

Report node options

General Chart Ppt Publisher Filter Masks Loop Save

Loop options

Loop id: carloop

☒ Ignore 'carloop'

☒ Show all iterations

Show these iterations:

☐ Volvo ☐ Saab ☐ BMW ☐ Audi ☐ Ferrari ☐ Fiat

Figure 523: Loop Question options

Setting	Description
Show average	Choose this to show the average values of the variables. The answers/scales have to be assigned values to (weighed).
Show best	The best average value is shown.
Show worst	The worst average value is shown.
Show all iterations	Check this box if you wish all iterations to be shown. Otherwise, uncheck this box, and mark the iterations you wish to report upon instead.
Loop id	Denotes the loop you are editing.
Ignore 'loop id'	This choice is available only for the questions in loops. If you check this box, the iterations will not be shown. Therefore, we would recommend unchecking it when reporting on the loop questions alone. On the other hand, you may check it when cross tabulating loops and loop questions, in order to prevent iterations from appearing both vertically and horizontally.

Table 48: Loop options

20.12 Iterated Reporting

The iterated reporting functionality in Confirmat makes it possible to create multiple sets of reports. Iterated reporting enables users to create one report, apply an iteration, and get one report for each predefined group 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. Iterations can also be applied to pivot views (see section 20.16 Pivot View).

20.12.1 Create Iterated Report

The workflow when creating an iterated report is as below.

1. Create the report/pivot view.
2. Create an iterator and define the iterations.
3. Assign the iterator to the report.
4. Assign iterator filter/mask to report nodes/pivot views.
5. Order Office reports for iterated report.
6. Publish iterated report and iterated pivot view.
7. Give users access to one or more iterations of a report.

20.12.2 Create Report

How to create a report/pivot view will not be explained in detail here as this is a subject of its own and explained in the User manual section 20.16 Pivot View. However, to enable the use of iterated reports or iterated pivot views, a few tips may be useful.

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/scales that are to be used as iterators have to be created as predefined scales and lists. Of course, these lists/scales do also have to be used in question(s) in the questionnaire tree.

20.12.3 Create Iterator and Define Iterations

Before a report iterator can be allocated to a report, the iterator must be created. The following steps explain how to create an iterator:

1. Drag an ‘Iterator’ object from the “New reporting objects” folder into the ‘Iterators’ folder of the reporting tree.
2. Drag the relevant list(s) from the “Scales and lists” folder into the iterator. It will be possible to add iterator level filters and masks on questions within the report based on these lists.
3. Enter the iterator properties page either by double clicking the iterator object, by highlighting it and using the menu “Edit” -> “Properties”, or by right clicking the element and choosing *Properties* from the menu. Here it will be possible to add, remove and modify iterations. As an example the page could look like this:

Iterator Properties

Name

Use all list elements ☐

Filter questions

department

Iterations

Del	Id	Title	English	department
☐				

Save Add Delete

Figure 524: Iterator

Fields in the iterator window

Field	Type	Description
Name	Field	Iterator name
Use all list elements	Check box	The iterator will use all list elements as iterations
Deleted	Check box	The iterator is soft deleted
Filter questions	Field(s)	Fields under equal lists/scales entered in the iterator. Enter the qID of the question that uses the list/scale and is the basis for the iterations of this list/scale
Del	Check box	Delete the iteration when "Delete" is clicked
Id	Field	Id of the iteration
Title English	Field	The English title, double click the field to enter titles in other languages
Any other column	Field	There will be one column per list/scale entered in the iterator. Enter the list element(s) that are to be included in the iteration.
Save	Button	Saves any entered or changed settings
Add	Button	Add an iteration row
Delete	Button	Delete iterations where the <i>Del</i> check box is checked

Table 49: Fields in the Iterator Window

In this example only one list, "Departments" has been entered in the iterator. In the "Name" field a name of the iterator can be entered. If "Use all list elements" is checked the iterator will create an iteration for each element in the list and it will not be necessary to specify the iterations. If "Use all list elements" is not checked you will have to add iterations under the "Iterations" heading.

Because scales and lists objects are used in the iterators, the questions to be used as basis for the iterations have to be specified. This is done in the field(s) under "Filter questions:". In this example, under "Filter questions:", the qID of the question to be used as basis for the "Departments" list must be entered. Note that this must be a question where the "Departments" list has been used.

To add iterations click the "Add" button. A row appears where list elements have to be added to create an iteration. One row for each desired iteration must be added.

Iterator Properties

Name

Use all list elements ☐

Filter questions

department

Iterations

Del ☐	Id	Title English	department
☐	1		[Edit]
☐	2		[Edit]

Figure 525: Iterator "Departments"

In the picture below an iteration has been created where the departments sales and marketing has been entered as one iteration and the development and support departments has been entered as another iteration.

Iterator Properties																			
Name	Departments																		
Use all list elements	☐																		
Filter questions																			
department	department																		
Iterations																			
Del ☐																			
☐	<table border="1"> <thead> <tr> <th>Id</th> <th>Title English</th> <th>department</th> </tr> </thead> <tbody> <tr> <td>1</td> <td>Sales&Marketing</td> <td>Sales Marketing [Edit]</td> </tr> <tr> <td>2</td> <td>Accounting&Adminis</td> <td>Accounting Administration [Edit]</td> </tr> <tr> <td>3</td> <td>CS&RD</td> <td>Customer Services Research and Development [Edit]</td> </tr> <tr> <td>4</td> <td>Marketing</td> <td>Marketing [Edit]</td> </tr> <tr> <td>5</td> <td>Sales</td> <td>Sales [Edit]</td> </tr> </tbody> </table>	Id	Title English	department	1	Sales&Marketing	Sales Marketing [Edit]	2	Accounting&Adminis	Accounting Administration [Edit]	3	CS&RD	Customer Services Research and Development [Edit]	4	Marketing	Marketing [Edit]	5	Sales	Sales [Edit]
Id	Title English	department																	
1	Sales&Marketing	Sales Marketing [Edit]																	
2	Accounting&Adminis	Accounting Administration [Edit]																	
3	CS&RD	Customer Services Research and Development [Edit]																	
4	Marketing	Marketing [Edit]																	
5	Sales	Sales [Edit]																	

Save Add Delete

Figure 526: Iterator "Department 2"

To add or remove list elements (Marketing, Sales,... in this example) from the iteration click on the “Edit” link in the appropriate iteration row or double click the cell. A detail window opens where the list elements are listed, see picture below.

Figure 527: Iteration 1

Fields in the Iteration details window:

Field	Type	Description
Available	Field	List of all available fields in the iteration
Used	Field	All selected fields to be used in the iteration
>>	Button	Moves highlighted fields from Available to Used
<<	Button	Moves highlighted fields from Used to Available
Save	Button	Saves the entered settings

Table 50: Fields in the Iteration Details Window

In this picture the departments “Support” and “Development” have been highlighted in the “Available” list and moved to the “Used” list with the arrow button. To save the edited iteration rows click the “Save” button.

It is possible to enter more than one list into the iterator. If so, one column per list is added to the iterator, like the Department column in the example Figure 526.

20.12.4 Assigning an Iterator to a Report

When the iterator is created, it may be assigned to one or more reports by selecting the iterator on the report properties page. See picture.

Figure 528: Report Properties

When an iterator has been selected in the dropdown box “Iterator:” and this is saved, a new field “Current iteration:” appears. See picture below.

Report Properties

Name: Example Report

Title: English

Iterator: Departments

Current iteration:

Filter on iterator: ☐

Filters in prod database: ☐ CS

Save Precodemasks

Figure 529: Report Properties 2

Fields in the report property window:

Field	Type	Description
Report name	Field	Name of the report
Weight Model	Drop down box	Selected weight model if any
Title	Field(s)	Report title, if multilingual project – one for each language. This title will be displayed in End User Interface.
Iterator	Drop down box	Selected iterator if any
Current iteration	Field	Enables preview of one iteration of the report
Save	Button	Saves the settings
Precodemasks	Button	To set precode masks on the report, opens new window

Table 51: Fields in the Report Property Window

All the created iterations in this iterator are available in the dropdown box “Current iteration”. To be able to preview the report later, when 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(s) is assigned to the report, the following actions can be taken:

1. Use the iterator as a filter on report nodes.
2. Use the iterator as a mask for corresponding question 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, which normally is not desired.)

Specify whether or not you wish to use the iterator as a filter, in each report node's properties page, or on the report's properties page. To do this:

1. Highlight the report node or the report or right-click the object.
2. Go to the **Edit > Properties** menu command.
3. Open the Filter tab.

The checkbox “Filter on report iterator” must be checked to make the iterator work as a filter on this report node. See Figure 530 below.

Figure 530: Filter on Report Iterator

Fields in the Filter tab of a report node's properties page:

Field	Type	Description
Filter on report iterator	Check box	Enable the use of the iterator as a filter
Filters in test database	Check box(es)	If any filters have been made, they are available here

Table 52: Fields in the Report Node's Properties Page

To use the iterator as a mask on a report node this must be specified in the "Masks" tab in the report node's properties page. An iterator must be selected in the dropdown box "Iterated report mask". See picture below.

Figure 531: Iterated Report Mask

Fields in the Masks tab of a report node's properties page

Field	Type	Description
Iterated report mask	Drop down box	Select list/scale to use for masking the iterated report
Show average	Check box	Choose this to show the average value of the variables. The answers/scales have to be assigned values to as described in section 7.2.3.3 Answers.
Show best	Check box	The best average value is shown.
Show worst	Check box	The worst average value is shown
Show all answers	Check box	All answers/scales are shown in the table/chart.
Show these answers	Check box(es)	You may check off specific answers/scales you want to be shown in the table/chart.

Table 53: Masks Tab of a Report Node's Properties Page

20.12.6 Assign Iterator Filter/Mask to Pivot Views

Enter the pivot view's properties page to connect an iterator to the view. Select the iterator to be used in the dropdown box "Iterator". See picture below.

Figure 532: Pivot View Properties

Fields in Pivot View Properties window:

Field	Type	Description
Name	Field(s)	If multilingual project, one name field per language. This name will be displayed in the End User Interface.
Iterator	Drop down box	Possible to connect an iterator to the view

Table 54: Fields in Pivot View Properties Window

To assign iterations to separate nodes in the pivot view, enter the pivot view node's properties page. Select the iterator to be used in the dropdown box "Iterated report mask". See picture below.

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 according to the iteration connected to him (see chapter 23 Administration of End Users).

Figure 533: Pivot View Form Properties

Fields in Pivot View Form Properties window:

Field	Type	Description
Iterated report mask	Drop down box	Assign an iterator to a pivot view node

Table 55: Fields in Pivot View Form Properties Window

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. This is done by highlighting the iterations listed in the "Report iterations" field in the "Export properties" page that appears when selecting the menu "Actions" -> "Order report", or when right clicking the report and selecting *Order*. This will be a multi-select, making it possible to order reports for several iterations at the same time. One report will be created pr iteration. If no iteration is highlighted, all iterations will be generated. See picture below.

Export properties

Project ID p0002008

Report name Example Report

Report iterations
 Accounting&Administration
 CS&RD
 Marketing
 Sales
 Sales&Marketing

PPT template Example PPT

Export files MS Excel and MS Powerpoint

Database Production

Language English

OLE in PPT ☐

Recipient email usermanual@firmglobal.com

Comment

Start time ASAP

OK

Figure 534: Export Properties for Iterators

- Fields in the Export properties window

Field	Type	Description
Report iterations	Field	Highlight the iterations to publish. If none is highlighted all are published.
PPT template	Drop down box	Select the desired PPT template to be used
Export files	Drop down box	Select the desired type of report export, PPT or Excel or both
Database	Drop down box	Select which database to export from, production or test.
Language	Drop down box	Select the desired language to use in export. All languages used in the project are available.
OLE in PPT	Check box	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	Field	The email address to which the export is to be sent.
Comment	Field	Possible to enter comments if desired.
Start time	Drop down box	Select if the report should be exported at once or scheduled for a later start time.

Table 56: Fields in the Export Properties Window

The Confirmit Office report task numbers will also include the precodes of the iterators.

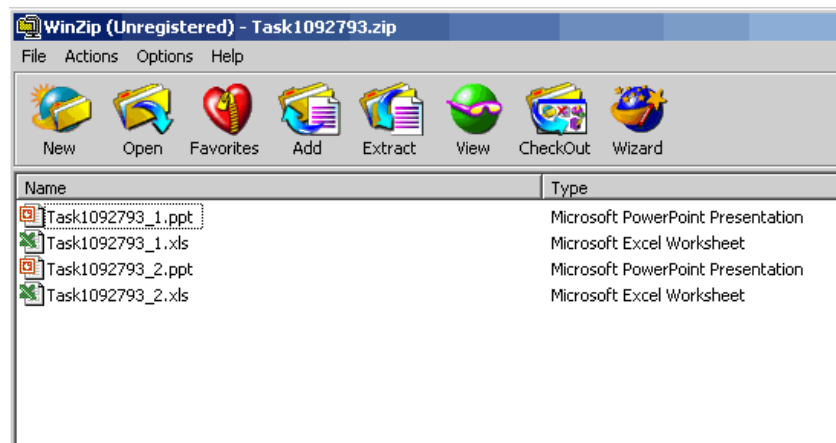


Figure 535: Iterator Precodes

20.12.8 Publish Iterated Report

To publish an iterated report, highlight the report and select either *Publish Prod* or *Publish Test* in the “Actions” menu, or you can also right click the report and choose either *Publish Prod* or *Publish Test*. A window for publishing reports is opened. See next picture below. The “Run now” checkbox must be checked and this must be saved. The “Protected” checkbox is set as default, which means that the users have to log on with a password to view the reports. To make the reports available to users, users have to be entered in the “Endusers”->“Users” and given access to the reports. Read more about this in chapter 23 Administration of End Users.

When iterated reports are published, one report is created for each iteration. These reports will have links of this format:

<http://<server>/publisher/<projectid>/<reportid>/<iterationid>/r.asp>

Through the Confrimit end user environment, users can be allocated access to specific iterations of this report. Read chapter 23 Administration of End Users for more information on allocating reports to specific users, and chapter 24 The Login Interface for End Users for more information regarding the end users login functionality.

When a report is published, it is possible to preview the report by highlighting the report and clicking the link “[View]” behind the field “Published report”. See picture below. When the report is an iterated report, this link leads to a page with the links to all iterations of the highlighted iterated report.

☐	Report no	Report name	Report type	Project id	Project name	DB	Available
☐	13	Report 1	Published Report	p0000995	Customer Satisfaction Survey	test	☒
☐	12	Report 1	Published Report	p0000995	Customer Satisfaction Survey	prod	☒

Report 1 (13)

Details Users Groups Companies

Details

Report no

13

Default language

English

Publish languages

Available

Norwegian

>>

<<

Selected

English

Template

confirmit default

Responses

Complete

Protected

☒

Available

☒

Test database

☒

Created by

johnndoe

Link

http://192.168.12.67/customer/publisher/r.asp?instance=13&l=<lang>&iteration=<iter>

Scheduling

[Change](#)

Run now

☐

One page

☐

Send email

Do not send

Email

Status

Not run

Last run

Figure 536: Publishing Iterated Reports

See chapter 23 Administration of End Users for more information on the end user interface.

20.12.9 Publishing Pivot Views

A pivot view is published the same way as a report, highlight the pivot view and select either *Publish Prod* or *Publish Test* from the “Actions” menu, or you can also right click the Pivot View and select either *Publish Prod* or *Publish Test*. The window for publishing reports is opened. A pivot view always displays real time data. If a pivot view has been edited, update the published pivot view by clicking the link “Update” in the field “Published view”. This window is available from the main menu “Endusers” -> “Reports”. Click on the report in the list in the top frame and click “Details”. See section 20.13 Publishing Reports for more information about these pages.

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

When an iterated report or pivot view has been published, it must be linked to specific users prior to the user being able to view the report. The end user functionality is built up around end user lists. A user must be connected to an end user list and a company, so these have to be created first or exist, before a user can be created. Only a Confirmit administrator can create an end user list.

To create an end user list go to “Endusers” -> “Lists” from the main menu. Click on the “New” button. A new row in the list is created. Give the new list a name and select a template in the dropdown box. Click Save.

Name	Template	Creator	Created	Active
				Search
☐ UserManualList	confirmit default (blue)	Manual, User	01.jun.02	

UserManualList

Details

Name

UserManualList

Template

confirmit default (blue)

Security

Security

Login

Login

URL

http://localhost/customer/login/login.asp?listid=2547

Creator

Manual, User

Created

01.jun.02

Figure 537: End Users Lists

When the list is created go to "Companies" which is also found under "Endusers" in the main menu. A list must be selected before it is possible to enter this page. In the upper left corner the selected list is displayed. The picture below shows this page before a company is created.

Companies

Active list: UserManualList

p0002008

Company no	Company name
	Search

Figure 538: Companies

Click on the "New" button. In the lower frame the "Details" page is opened. Enter a company name in the field "Company name" and click "Save".

Active list: UserManualList p0002008

Company no	Company name	
		Search

Details
Reports
Users

Details

Company no

Company name

Figure 539: Company Details

When a company is entered go to "Users" which is also found under "Endusers" in the main menu. A list must be selected before entering "Users" (which is already done). As shown in the picture below, the active list is displayed in the upper left corner of the page. The picture shows the page before any users have been created in the list.

Users

Active list: UserManualList p0002008

User no	User id	Name	Email	Company	
					Search

Figure 540: Users

Click on the "New" button. In the lower frame the "Details" window is opened with blank fields. See picture below.

Details
Reports
Groups

Details

User no

User id

Password

Email

Last name

First name

Company

Language

Comment

Last logged on

Date created

Company1

English

Save

Figure 541: User Details

Enter a new user and save. In the picture below user details have been entered.

Details
Reports
Groups

Details

User no

User id

Password

Email

Last name

First name

Company

Language

Comment

Last logged on

Date created

User1

User1

someone@somewhere.com

One

Some

Company1

English

Save

Figure 542: Entered User Details

When the new user has been created he or she is entered as a row in the upper frame. Highlight this row and click on "Reports". See picture below.

Active list: UserManualList p0002008

Delete

New

☐	User no	User id	Name	Email	Company
☐					Search
☐	1	User1	Some One	someone@somewhere.com	Company1

User1

Details

Reports

Groups

Delete

Add

☐	Report no	Report name	Report type	Project id	Project name	DB

Figure 543: Reports for a User

To connect this user to a report, click the “New” button at the bottom of this page. A new page pops up as displayed in the picture below with all available reports listed.

Active list: UserManualList p0002008

Delete

New

☐	User no	User id	Name	Email	Company
☐					Search
☐	1	User1	Some One	someone@somewhere.com	Company1

User1

Details

Reports

Groups

Delete

Add

☐	Report no	Report name	Report type	Project id	Project name	DB
☐	Iterations 1	Example Report	Published Report	p0002008	2Individual/Iterated/Pivot Reporting prod	

Figure 544: Report List

Highlight the report you want to connect to the user and click “Save” and “Close”. The selected report is entered as a row in the “Reports” frame. Highlight this row and click the “Iterations” button at the bottom of the page. A new page pops up with all available iterations of the selected report listed. See picture below.

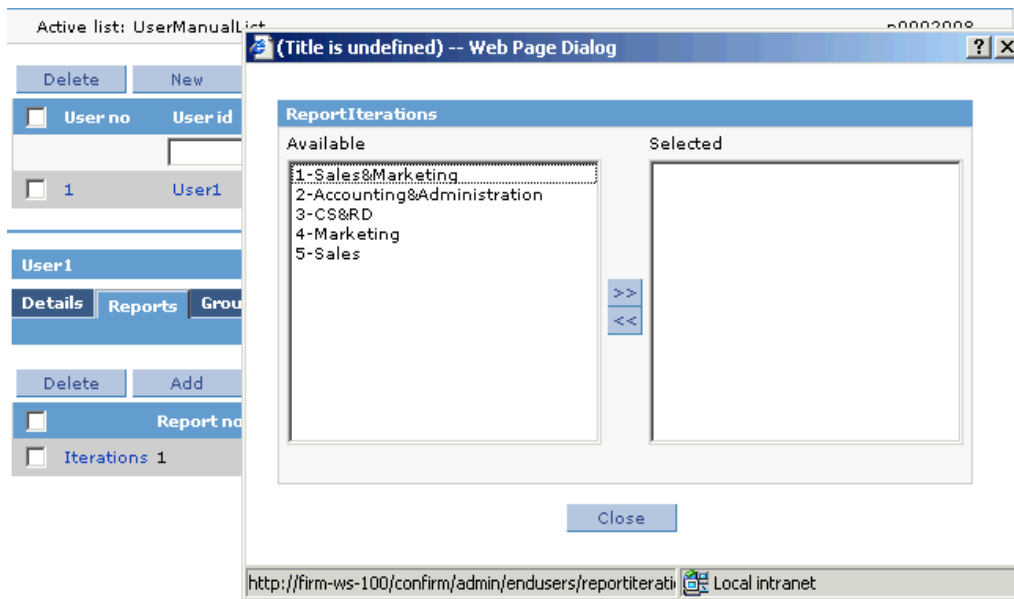


Figure 545: Report Iterations

Field	Type	Description
Available	Field	Available iteration that can be selected
Selected	Field	The selected iteration(s)
>>	Button	Moves the highlighted iteration(s) over to the Selected field
<<	Button	Moves the highlighted iteration(s) over to the Available field

Table 57: Fields in the Report Iterations Window

Highlight the iteration that you want to give the user access to, click the arrow to move it over to the “Selected” frame and click the “Close” button. Now this user has access to the selected iteration of the selected report through the end user login system. New users have to receive their user id, password and URL link to the end user login page. The URL link is found in the row for the list this user is connected to in the “Lists” page under “Endusers” in the main menu. This must be sent to them.

Users may have access to several reports through the end user login functionality. Read more about this functionality in the chapter 24 The Login Interface for End Users.

20.13 Publishing Reports

To publish a report, highlight the report in Online Reporting and select either *Publish Prod* or *Publish Test* in the “Actions” menu, or you can also right click the report and choose either *Publish Prod* or *Publish Test*. A window for publishing reports is opened in Reports under End users.

☐	Report no	Report name	Report type	Project id	Project name	DB	Available
☐	13	Report 1	Published Report	p0000995	Customer Satisfaction Survey	test	☒
☐	12	Report 1	Published Report	p0000995	Customer Satisfaction Survey	prod	☒

Report 1 (13)

Details
Users
Groups
Companies

Details

Report no 13

Default language English

Publish languages

Available
Norwegian

Selected
English

Template confirmit default

Responses Complete

Protected ☒

Available ☒

Test database ☒

Created by johndoe

Link http://192.168.12.67/customer/publisher/r.asp?instance=13&l=<lang>&iteration=<iter>

Scheduling Change

Run now ☐

One page ☐

Send email Do not send

Email

Status Not run

Last run

Figure 546: Publishing Reports

Setting	Description
Report	The name of the report being published
Default lang	Language (based on your <i>User Settings</i> at the time of publishing). The reports will be published in all project languages with a unique link for each language.
Publish languages	<i>Available</i> – will display all project languages. <i>Selected</i> – will display the project languages in which the report will be published.
Created by	Creator's name
Status	Not run, success, or failed
Scheduling	Allows you to choose how often the data is to be updated. See section 4.9 Task.
Protected	When chosen, the report will only be accessible via End users interface. When not chosen, the link/-s to the report will be open.
Available	If you have set up the publisher as a recurring task, you can deactivate it by unchecking this option.
Test database	If the database for the report is the test database, this property will be checked.
Template	Report layout (see section 4.11 Templates). Choose a template from the dropdown.
Responses	Choose the base of your report. You can choose between Complete, Incomplete, and Both.
One page	All reporting on one page
Last run	Time of latest update of data
Run Now	By activating this, the report will be updated on the next engine run, even if the frequency setting requirements are not met.
Link	The generic link to the report will be displayed, for example: <a href="http://survey.confirmit.com/customer/publisher/r.asp?instance=XXXX&l=<lang>">http://survey.confirmit.com/customer/publisher/r.asp?instance=XXXX&l=<lang> If the survey is only in one language, you can remove the last part of the link, so the link becomes like: http://survey.confirmit.com/customer/publisher/r.asp?instance=XXXX If your survey is a multilingual survey, you will have to manually add the correct Confirmit language code for the open report links. For example if your survey is in Italian and Spanish, the report links will look as follows: http://survey.confirmit.com/customer/publisher/r.asp?instance=XXXX&l=16 http://survey.confirmit.com/customer/publisher/r.asp?instance=XXXX&l=10
Delete	Allows to delete a published report
Send	The report can in addition to be sent by email to email addresses specified in the Email

email/Email	field.

Table 58: Report publisher options

To publish the report the first time check the “Run now” checkbox and click Save. The “Protected” checkbox is set as default, which means that the users have to log on with a password to view the reports. To make the reports available to users, users have to be entered in the “End users”->“Users” and given access to the reports. Read more about this in chapter 23 Administration of End Users.

When a report is published, it is possible to preview the report by highlighting the report and clicking the link “[View]” behind the field “Published report”.

20.14 Report Publisher for Users Who do not Have Access to Advanced Reporting

20.14.1 Publishing a Report

The Confirmit Publisher allows you to make your reports available to anyone you want. You select the data/charts to display, and Confirmit updates results according to your settings.

The reports may be published on the WEB (either openly available or password protected), or attached as an HTML file to an e-mail. If your company has installed Confirmit in-house, the location for publishing reports (either your intranet or the WEB) has been decided by your company.

To be able to publish a report, you must create one as described in section 20.4 Building Reports. The settings you choose for the report are also applied to the Publisher. However, note that the Publisher engine does not support 3D graphs. Also check that you have Excel as your *Chart Component* in *User Settings*, or you will get a different result published than what you see in the report.

To edit charts to be published, open the relevant report from the *Reports* folder, and single-click on the slide you want to edit (as shown in the picture below). Choose *Properties* from the *Edit* menu, and make the adjustments you have to. You may also right click the report elements and choose *Properties* from the menu. For more information about the options available to you, see section 20.11 Settings. Publisher options can be edited in all project languages simultaneously. When you publish a report, it will be published in all project languages.

If you have edited Power Point options prior to editing Publisher options, you can easily copy Power Point Header texts and Texts into your Published Report by clicking *Copy Power Point texts* button.

If you do not edit the Publisher options, the question titles will be by default piped in as Header texts.

Report node options

General | **Chart** | Ppt | **Publisher** | Filter | Masks | Save

Publisher options

Content Only chart ▼

English

Title Both

Only chart

Only table

None

Text

Norwegian

Title

Text

Copy PowerPoint texts

Figure 547: Editing a slide to be published

Settings that are unique for Publisher, are found in the *Publisher Options*-window (picture above). You can insert *Header text* and / or *Text*. They will both be placed above the tables/charts being published. Your text fonts and colors can be defined by standard HTML commands. You can also choose whether to show tables, charts or both.

After having prepared the report, you publish it by highlighting the report name (in the example above: R1), and choose *Publish Report* from the *Actions* menu, or you may also right click the report and choose *Publish* from the menu. The following screenshot will appear:

Published Reports for project 'p0001001'

Report	Database	Default lang	Creator	Targets	Users	Template	1 page	Scheduling	Status	Last run	Run now	Del	Remove from web
ExampleReport2	Production ▼	English ▼	publisher	Targets	Users	[None]	☐	Schedule	Never	☐	☐	☐	Remove

Save

Figure 548: The Publisher screenshot

The settings available to you are:

Setting	Description
Report	The name of the report being published
Database	Can be either Test or Production
Dafault lang	Language (based on your <i>User Settings</i> at the time of publishing). The reports will be published in all project languages with a unique link for each language under Targets.
Creator	Creator's name
Status	Success or failed
Scheduling	Allows you to choose how often the data is to be updated. See section 4.9 Task.
Targets	Settings for how the report is to be published.
Users	Users allowed to view the report when publishing on a <i>protected link</i>
Template	Report layout (see section 4.11 Templates). A new page with all the templates available to you will be displayed.
One page	All reporting on one page
Last run	Time of latest update of data
Run Now	By activating this, the report will be updated on the next engine run, even if the frequency setting requirements are not met (the Confirmit engine normally runs every 5 minutes).

Delete	Allows to delete a published report
Remove	The report is being removed from the web.

Table 59: Report publisher options

You must always define Targets (and Users if you publish on a *protected link*) before a report is available for publishing.

About **Scheduling**: Confirmit will update the published report every x Hours, days, weeks, months.

1. If you click on the *Schedule* link, you will be brought to the Task Settings window, where you will be able to define the Recurrence pattern of the published report.

Figure 549: Task Settings for Publisher

2. Click the *Change* button, set Recurring task to Yes, and you will be able to define the Recurrence pattern of the batch job.

Figure 550: Recurrence Pattern for Published Reports

About **Target**: Following the same add / save procedure as described above, you can choose three ways of publishing the report.

- The e-mail option sends the report as attachments to the mail-addresses you choose (each chart will be sent as separate gif).

When you use the “Send email” function, you will receive a “.zip” file containing one HTML page for each report page in the report. In addition you receive a “.gif” file for each of the charts. The “.zip” file should be extracted into a folder on your PC (chose/create the folder yourself). To access the report, simply open the HTML file called “0.htm”. This allows you to view the report offline as if it was online.

- Cryptic link places the report on the address automatically generated. You can send the link to your users, or make it available from a home page. Anyone with knowledge of the link can view the report. Every project language will have its own report link.
- Protected link places the report on the address automatically generated, but users need a *userid* and a *password* to access it. You should have prepared a list of users as a tab delimited text document, with column headings *userid* and *password*. Click Users, Upload, Append or Overwrite, browse for the source file and complete by uploading. You must make login information available to the users. Every project language will have its own report link.

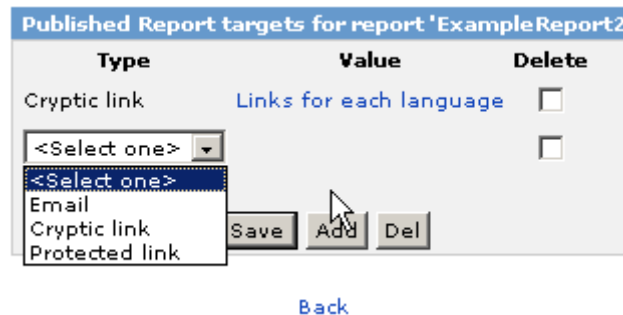


Figure 551: Targets

Note: Depending on the browser's settings of those entering the report, they might have to refresh (F5) each page of the report when entering a second time to get the updated data.

20.14.2 Changing a Report after Publishing

The report in the Report Folder is the source of the published report. So if you for example want 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).

You cannot however change the overall settings after publishing. So if you are publishing a report with Count Format (from *Format* in the *General*-window in figure 181), and later wish to change to Percent, you will have to publish the report once more after having changed the settings. The same applies for change in language, or if you want to remove or insert a chart after publishing. In all these cases you must publish once more. This, however, does not apply to changing from Test data to Production data in *Source* in *General Settings*.

Outdated publishings are removed by clicking Delete and Save.

20.14.3 Publishing Different Data from One Survey to Separate Target Groups

You might want to make different results from a survey available to different target groups. You have to prepare the reports separately in *Online Reporting*. Thereafter you publish them one by one, selecting the wished publishing mode.

20.15 Matrix Views

A matrix view is mainly a Confirmit user interface, but can also be used by research analysts. The concept is to select three sets of questions.

Question set	Description
Questions	These questions are placed in the left part of the matrix. Only these questions can be reported as single questions within the matrix view.
Cross questions	These questions are placed in the bottom part of the matrix. The questions can be cross tabulated against the cross questions.
Filters	The filter questions will be available in two filter dropdown lists at the top of the matrix. This means that results can be filtered on two questions simultaneously. In one filter you can chose one or more answer alternatives to let through the filter.

Table 60: Matrix view question sets

20.15.1 Configure Matrix Views

The matrix views are configured from the reporting tree. The following operations can be done on the matrix view:

- **Create a new matrix view.** Dragging a “New Matrix View” -object from the “New reporting objects” -folder into the “Matrix Views” -folder creates a new matrix view.
- **Change name.** Select *Edit* → *Properties* in the report tree menu, and change the matrix view name and id from the report frame. You may also right click the object and choose *Properties* from the menu.
- **Add question to a question set.** When a new matrix view is created, the matrix view element in the reporting tree includes three subfolders, one for each question set. Questions are added to the subfolders by dragging them from the “Form”-folder.

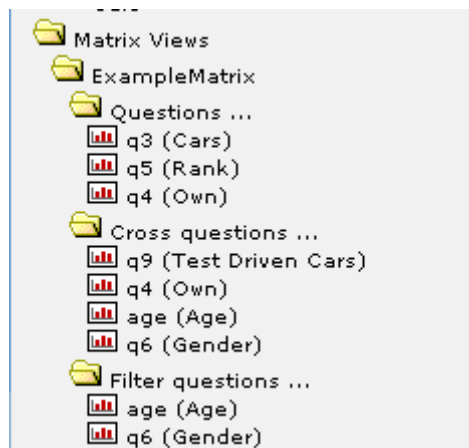


Figure 552: Matrix view configuration

20.15.2 Using Matrix Views

When the matrix view is initially entered, no charts or tables are displayed. The table below shows what options are available in the matrix view.

Note: The chart or table must be refreshed every time the user changes options.

Option	Description
Select a question	By pressing a question part of the matrix, a question is selected. The question can be selected on and off by pressing them repeatedly. A dark color on the button indicates a selected question
Select a cross question	Cross-questions are operated the same way as the indicator questions. When a cross-question is selected, the selected indicators

	are crossed with this demography question.
Make filters available	Select the “Filters”-option
Apply a filter	The question to filter on is selected from a dropdown list in the top of the matrix. When a question is selected, a row of answer alternatives appears to the right of the dropdown list. The alternatives to let through the filter should be selected.
Change display	The display can be switched between chart and table by changing the “Display”-option.
Change format	Format can be switched between count, percent and index (average) by changing the “Format”-option.
Change matrix size	Changing the “Screen” -option can change the matrix size. There are predefined matrix sizes defined to fit the following screen resolutions: 800x600, 1024x768 and 1280x1024
Make timeseries available	Select the “Timeseries”-option. This will add a time series row below the chart area.
Apply a timeseries	In the time series row, periods can be changed between weeks, months or years. When for example months are chosen, the months where there have been any respondents are displayed. When the trend button is selected, a line chart of the different weeks is displayed. When selecting a single week, this week is added as a filter.

Table 61: Matrix view operations

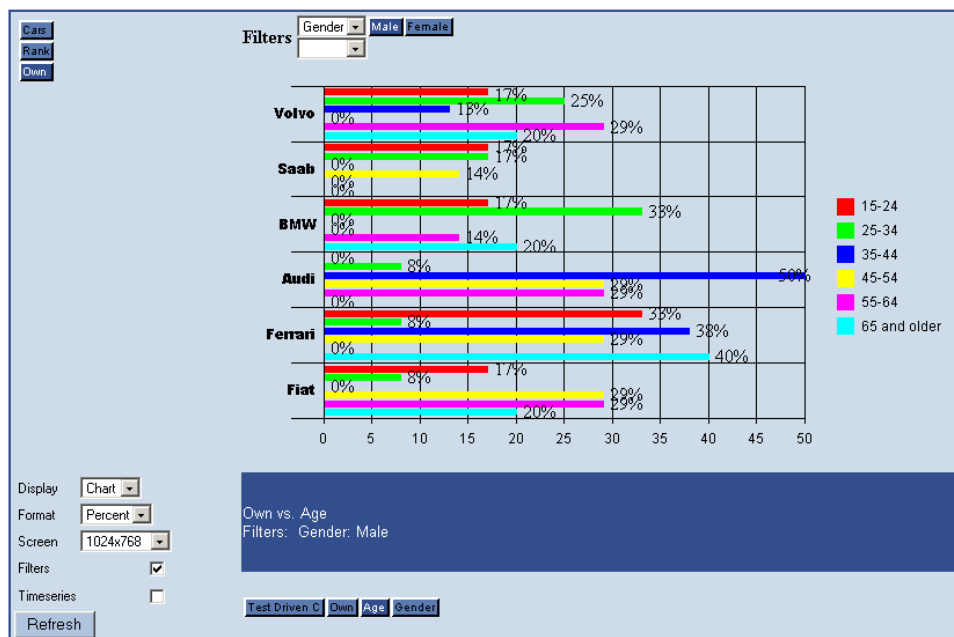


Figure 553: Matrix view

Here are some rules and guidelines for what can be done and what cannot be done within a matrix view.

- To be able to display a chart, at least one question must be selected in the right question column.
- Index format can only be used with single punch and grid questions.
- Index format can only be used with weighted questions, see section 7.2.3.3 Answers for how to weight a question.
- More than one question in the left question list can only be selected when dealing with indexes.
- A filter cannot be selected without selecting any of the answer alternatives.

Maximum 2 questions can be selected from the demography list. The crosstabs generated are nested by the demography questions. Nesting of more than two questions is rarely necessary, and would jeopardize the performance of the reporting server too much.

20.16 Pivot View

Pivot view 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 are real time and views may be created while the survey is live.

The following item types can be used 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 or she has been given access to through the iteration. Read section 20.12 Iterated Reporting. for more information about iterators and iterated reporting.

20.16.1 Create Pivot View in Report Tree

This section describes how to create pivot view with the help of an example project. The project is a survey about cars.

The “basis” of the pivot view is created in the report tree. Only questions that are inserted in the pivot view folder will be available to use in the pivot view screen to create different views. In this manual the expression “create pivot view” will be used both in the meaning to create the pivot view in the report tree and in the meaning to create different views in the dynamic pivot view screen used by the end users.

The pivot view is built in a similar way as a report is built, in *Online reporting* under *Reports* in the main menu. There is a folder called *Pivot Views* where new pivot views are entered. Under *New reporting object* you find *Pivot View* and *Pivot View Group*. See figure.

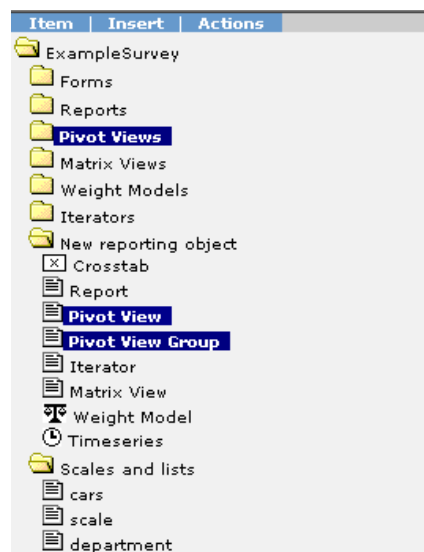


Figure 554: Pivot View in Online Reporting

To create a new pivot view, drag a *Pivot View* from *New reporting object* and drop it in the *Pivot Views* folder. Enter the new pivot view's properties page either by double clicking the new pivot view, by highlighting it and entering the menu *Edit* → *Properties*, or by right clicking the object and choosing *Properties* from the menu. Give the new pivot view a name in the “English” field (there is one name field for each language in the project if the project is multi lingual). In the example that is used in this manual we call the pivot view “Cars”. See figure below.

Figure 555: Pivot View Properties

A *Pivot View Group* is a folder that holds reporting objects. It does not have any other functionality than 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 below, two *Pivot View Groups* from *New reporting object* are dragged and dropped into the pivot view “Cars”. The names “Demographics” and “Car questions” are entered in each pivot view group’s properties page in the “English” fields.

The single questions “Gender” and “Age” are dragged and dropped into the group “Demographics”. The multi question “Cars”, the loop “carloop” and the open text numeric question “How many cars” are dragged and dropped into the group “Car questions”. See figure below.

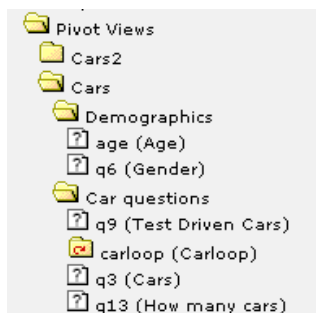


Figure 556: Building a Pivot View

20.16.2 How to Connect an Iterator to a Pivot View

It is possible to connect an iterator to a pivot view. This section describes how to do this. The rest of this document and the example do not discuss iterated pivot view. This is described in the “Iterated reporting” section. However, to publish an iterated report does not involve any more steps than these described in this section, and to connect iterations of the pivot view to users.

Enter the pivot view’s properties page to connect an iterator to the view. Select the iterator to be used in the dropdown box *Iterator*. See picture below (the figures in this section are not from the Car survey).

Figure 557: Pivot View Properties

To assign iterations to separate nodes in the pivot view, enter the pivot view node's properties page. Select the iterator to be used in the dropdown box *Iterated report mask*. See picture 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 558: Pivot View Form Properties

20.16.3 Publish Pivot View

To publish a pivot view, highlight the pivot view, enter the *Actions* menu and select the menu choice *Publish prod* (or *Publish test* if desired). The *Reports* window is opened (this window is actually located under *Endusers* → *Reports* in the main menu). See picture below (note that in these pictures the pivot view has been published in test mode. This is why it says "yes" in the test field and the *Test database* is checked).

Report no	Report name	Report type	Project id	Project name	DB	Available
7	TV report	Pivot View	p0033160	TV Case	prod	☒
6	Main Report	Published Report	p0033160	TV Case	test	☒

Figure 559: Publishing Pivot View

In this page the report or pivot view that just has been published is highlighted. The page is separated in two parts. The upper part holds the list of published reports/pivot views (different report types). In the picture only one report (our pivot view) has been published. In the lower part of the page it is possible to enter the selected report's/pivot view's details, users, user groups or companies. For more information about this end user functionality, read chapter 23 Administration of End Users.

Click on the *Details* tab. See picture below.

Figure 560: Pivot View Details

To enter the published pivot view in preview mode, click the *View* link at the *Pivot View* field. The page in the picture below is opened.

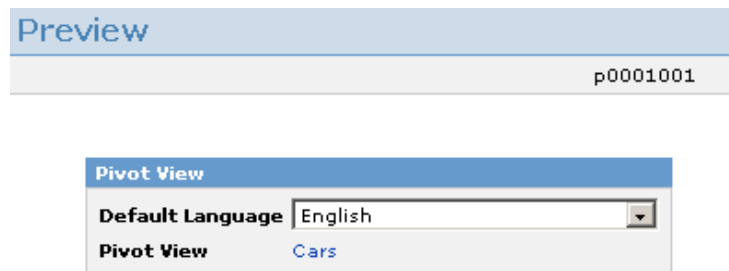


Figure 561: Entering Pivot View in Preview Mode

Click the link (*Cars*) and the pivot view screen is opened.

20.16.4 Pivot View Interface

This interface is entered either from the Confirmit interface (as a Confirmit user) or from the *Endusers* interface.

The pivot view interface is divided into two frames, left and right. The left frame is the user interface, and consists of different elements (see figure *Overview* below). Based on the items in the *groups* and *questions/items* (will be referred to as items from now on), the user can build different views by dragging and dropping the different items into the containers. Choosing *chart* or *table* in the menu, will show the result based on the items in the containers, the result will be displayed in the right frame of the window.

The content of the right frame will change according to the actions taken in the left frame.

The right frame will be explained in accordance with the left frame menu elements affecting it.

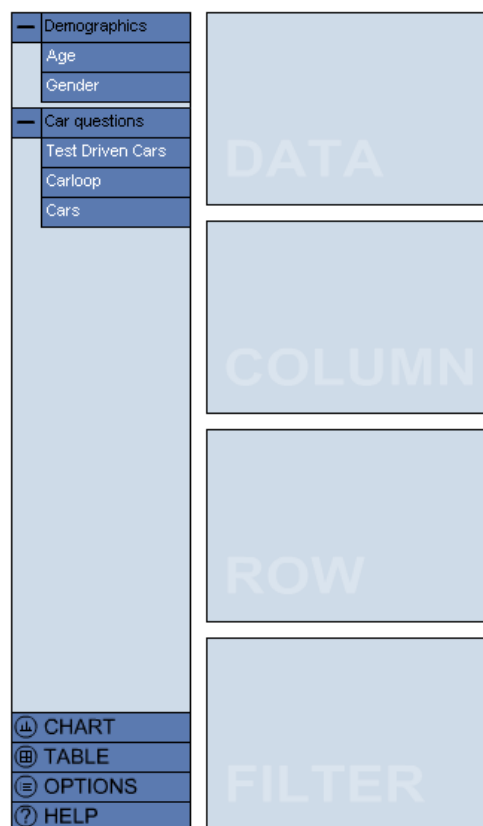


Figure 562: Overview

20.16.5 Hot keys

You can use hotkeys instead of clicking the menu items Chart, Table, Options and Help. The hotkeys are:

c – for chart
t – for Table
o – for options
h – for help

Note: To use the hotkeys, the left frame must be active. If the hotkeys do not appear to be functioning, click in the left frame to make it active.

20.16.6 Application interface (left frame)

The menu can contain one or more *pivot groups*, which in their turn contain one or more *items*. The next figure shows the appearance after items has been dragged from the top half of the menu and into the different containers:

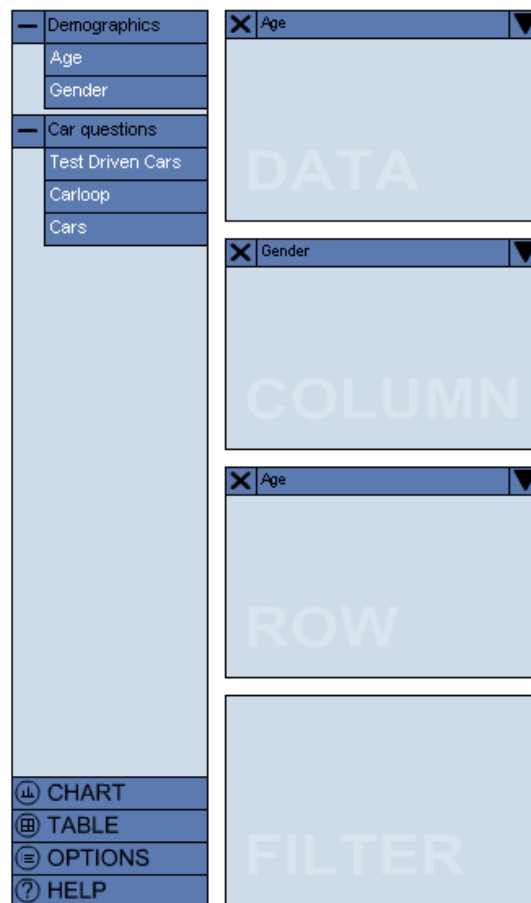


Figure 563: Overview - Containers

The application consists of the following items:

- **Groups** – one or more groups that contain items.
- **Chart** – displays a chart in the right frame, based on the items in the container.
- **Table** – displays a table in the right frame, based on the items in the container.
- **Options** – displays an options menu in the right frame, where the user can choose from different types of settings. For further details see section 20.16.6.4 Options.
- **Help** – displays a help page in the right frame.
- **Containers** – four containers that can contain items from the groups.

Some symbols trigger actions when clicked. The following 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.

20.16.6.1 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.

20.16.6.2 Chart

Clicking *chart* will produce a chart in the right frame based on the items in the different containers. The chart formats are similar to the ones in Confirmit published reports.

20.16.6.3 Table

Clicking *table* will produce a table in the right frame based on the items in the different containers.

20.16.6.4 Options

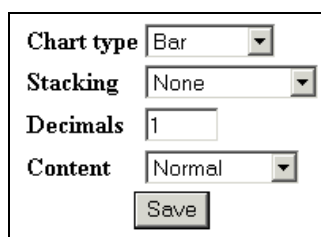
When the options menu item is clicked, an options page will appear in the right frame (see figure335 below). The changes you make here will be stored, and used until you change them again – regardless of having logged out and back into the Pivot view interface.

Note:

The options *Chart type* and *Stacking* only apply to charts.

The option *Decimals* applies to both charts and tables.

The option *Content* only applies to tables



The image shows a dialog box titled 'Options' with four settings:

- Chart type:** A dropdown menu currently showing 'Bar'.
- Stacking:** A dropdown menu currently showing 'None'.
- Decimals:** A text input field containing the number '1'.
- Content:** A dropdown menu currently showing 'Normal'.

At the bottom of the dialog box is a 'Save' button.

Figure 564: Options

The different options are:

Chart type: You can choose between different chart types. The different item types have different default values. (This option only applies to charts.)

Chart type: Bar

Stacking: Column

Decimals: Bar

Content: Line

Figure 565: Chart Type Options

Stacking: You can choose to stack the data in different ways in 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.)

Chart type: Bar

Stacking: None

Decimals: None

Content: 100% stacked

Save

Figure 566: Stacking Options

Decimals: Choose the number of decimals to use. (This option applies to both charts and tables.)

Chart type: Bar

Stacking: None

Decimals: 1

Content: Normal

Save

Figure 567: Options

Content: Sets the percentage based on the data in rows or in columns. (This option only applies to tables.)

Chart type: Bar

Stacking: None

Decimals: 1

Content: Normal

Figure 568: Content Options

20.16.6.5 Containers

There are four containers: *Data*, *Column*, *Row* and *Filter*. You can drop one question in more than one container, but the effect will vary based on in which container the element is dropped. The containers have the following functionality:

20.16.6.5.1 Data

The element or elements will act as the basis for the calculations made in the pivot view right frame. Because of this, it must contain at least one element. If you for example choose an item that has been answered only by 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 basis, you will have to use an item that has been answered by all 500 respondents.

20.16.6.5.2 Column

The elements placed here will be displayed as columns in the table in the right frame. You can choose to mask some of the elements by clicking them. See figure below (in the figure, all elements are chosen).

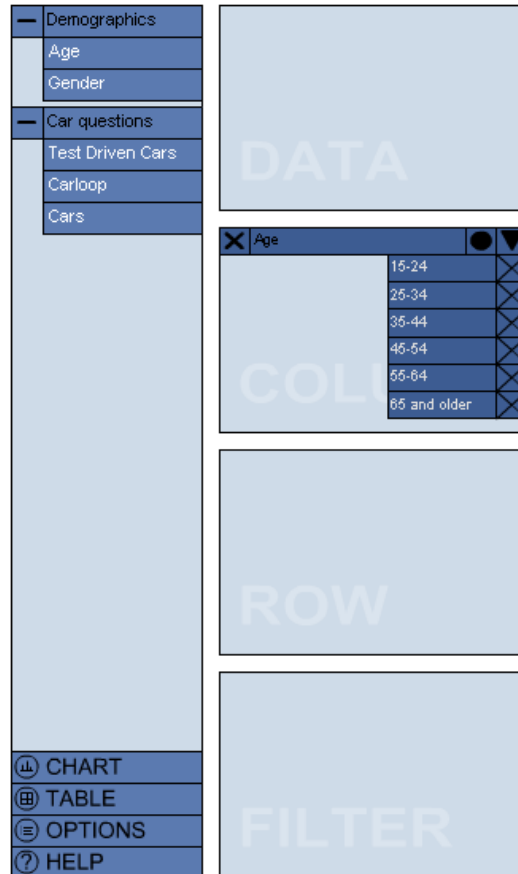


Figure 569: Content Options

20.16.6.5.3 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.

20.16.6.5.4 Filter

The elements here are used as filters for the result in the right frame. The following figure shows how you filter for example two elements in a list of many elements:

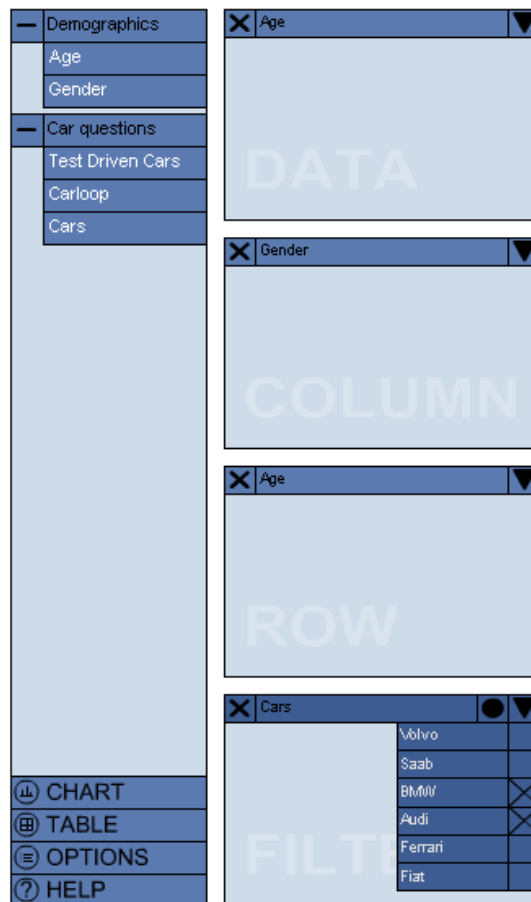


Figure 570: Filter

The figure shows that only BMW and Rover should be used as basis data for the view in the right frame. Clicking on the drop-down symbol on the top right hand side of the *Filter* container will display 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. Clicking the circle will invert the choices; in this case it will choose all but the two that are now chosen. If you want to choose only one more element, simply click the preferred element and it will be marked with an X.

20.16.7 Containers and items

The different items have different alternatives connected to them. This will vary for the different types of items, and can also vary based on which container the item is placed in. The application excludes some item types from certain containers. Mixing of many items in the different containers can also logically give results that are meaningless. Some basic rules for use of different items are therefore implemented. The following sections explain how to use the different elements in the different containers.

20.16.7.1 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 basis for the data, then a variety of options can be made on how to display the data (see figure below).

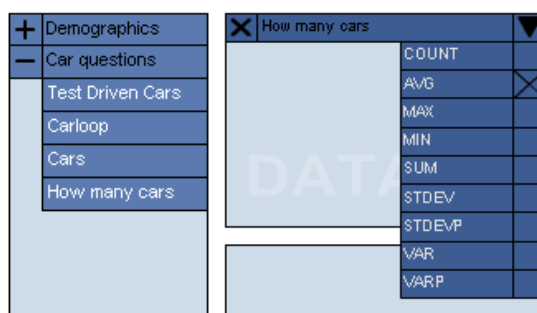


Figure 571: Data Options

Choosing the different types will generate different results in the right frame.

Type	Description
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.

Table 62: Description of Data Types

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 average will give the average of the number of owned cars within each age group. Choosing max will show the highest value of owned cars within each age group.

20.16.7.2 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.

20.16.8 Masks

There can be applied masks for questions in the *Column* or *Row* containers. Clicking the arrow at the top right hand of the container reveals the alternatives to mask. All alternatives are chosen by default. Deselect the elements that you do not want to be shown in the right frame of the window.

20.16.8.1 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 has a single question – Age in it. Masks exclude two different age groups. If you display the result in the right frame and add the number of respondents, the result will not correspond with 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 here, 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 the questionnaire can be turned into recoded variables by selecting [Properties => Recoded var] for the question. This causes an expression column to appear in the answer list of the question. These expressions should 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 kinds of recoded variables in Conformat, SQL based and JScript based variables. Calculation depends on what kind of variable is used. SQL based is the default variable type. Select [Properties => JScript based] to change the variable type.

The expressions are entered in the answer list of the recoded variable. To create a variable based on another specific question, it may be helpful to use the expression builder. This is activated by clicking the question you will base your variable upon when you are in the answer list of the variable.

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 than '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: Conformat 11 supports MS SQL Server 2005 in addition to MS SQL Server 2000.

Note: 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	<code>convert(int ,age)<40</code>	Y
Old	<code>convert(int ,age)>=40</code>	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	<code>car_chevy<>'0' OR car_buick <> '0'</code>	A
European car	<code>car_opel<>'0' OR car_vovlo<>'0' OR car_saab<>'0'</code>	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	<code>status='screened'</code>	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 done 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.

The screenshot shows a software interface with a top toolbar containing icons for Save, Undo, Redo, Find, Cut, Copy, Paste, Bold, Italic, Underline, and text formatting options (Font, Size). Below the toolbar are tabs for Text, Answers, Preview, Results, and Languages. The 'Answers' tab is active, displaying a table with columns: English, Expression, Precode, and Weight. The table contains two rows: 'Young' with the expression 'q3=='1' || q3=='2'' and 'Middle' with the expression 'q3=='3' || q3=='4''. Below the table are buttons for Add, Clear, Delete rows, and Save. The 'Condition builder' section below has three columns: Column, Operators, and Legal values. The 'Column' column contains 'q3'. The 'Operators' column has a list of operators including ==, !=, <, <=, >, &&, ||, !, parse:, date(), avera:, and .In(). The 'Legal values' column lists age ranges with counts: Under 18 [1], 18 to 30 [2], 31 to 50 [3], 51 to 67 [4], and 68 or more [5].

English	Expression	Precode	Weight
Young	q3=='1' q3=='2'		
Middle	q3=='3' q3=='4'		

Column	Operators	Legal values
q3	== != < <= > && ! parse: date(avera: .In(	Under 18 [1] 18 to 30 [2] 31 to 50 [3] 51 to 67 [4] 68 or more [5]

Figure 572: Variable definition with condition builder

After adding a recoded variable, you will always have to 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, see section 20.3 Recoding Variables for Reporting Purposes.

22 Individual Reporting

Note: For some users, the Individual Reporting functionality will be subject to payment based on usage.

Individual reporting is used for searching and reporting individual answers, as opposed to the aggregated results in the tables and charts of online reporting.

Remember that in most countries, reporting on individual level requires some sort of active approval from the individual respondent. We recommend that you follow the rules applying to the markets you operate in.

Say you are doing 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 something like Figure 573: Example of an individual report.

The screenshot shows a web interface for individual reporting. On the left, there are navigation links: "Name and department", "Use", and "High user level Word". The main area is titled "Name and department" and contains search criteria: "Name" with the value "*Jo" and "Department" with a dropdown menu showing "Sales", "Marketing" (selected), and "Accounting". Below this, a section titled "Result (2)" displays a table of results:

#	Name	Department
1	Alan Jones	Marketing
2	John Smith	Sales

To the right of the table, there is a detailed view for the selected respondent, Alan Jones. It shows his "Department" as Marketing and a list of "Use" for various MS Office applications:

Use	
MS Word	x
MS Excel	x
MS PowerPoint	x

Below this, the "User level" is shown for each application:

User level	
MS Word	4
MS Excel	1 Beginner
MS PowerPoint	5 Expert

Figure 573: Example of an individual report

Here you can search to find a set of respondents, and go into each one of them to see their answers.

An individual report consists of three different parts:

Search Definitions

Hitlist

Single View

In "Search Definition" you specify what questions the users should be able to use for searching.

The screenshot shows the "Search Definitions" interface. It has the same navigation links as Figure 573: "Name and department", "Use", and "High user level Word". The main area is titled "Name and department" and contains search criteria: "Name" with the value "*Smith" and "Department" with a dropdown menu showing "Sales", "Marketing" (selected), and "Accounting".

Figure 574: Search Definitions

The results are displayed as a list of respondents in the “Hitlist”, and you select the questions that should be displayed in the Hitlist as columns.

Result (2)		
#	Name	Department
1	Alan Jones	Marketing
2	John Smith	Sales

Figure 575: Hitlist

When selecting 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.

Name	Alan Jones	
Department	Marketing	
Use	MS Word	x
	MS Excel	x
	MS PowerPoint	x
User level	MS Word	4
	MS Excel	1 Beginner
	MS PowerPoint	5 Expert

Figure 576: 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 routing. As in aggregated reporting, variables from the respondent list must be included as background questions in the questionnaire before interviewing starts to be available for use in individual reporting.

Individual reports can be made accessible for people that are not Conformat users in the End User Interface.

22.1 Building an Individual Report

Individual reporting is accessible from Reporting -> Individual reporting after choosing a project. The routing of the questionnaire will appear and you will also have folders for the elements of the individual reporting. To open the routing, single-click the routing folder. To open all folders, click the Expand button.

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 first you have to define the search definition(s), hitlist and single view.

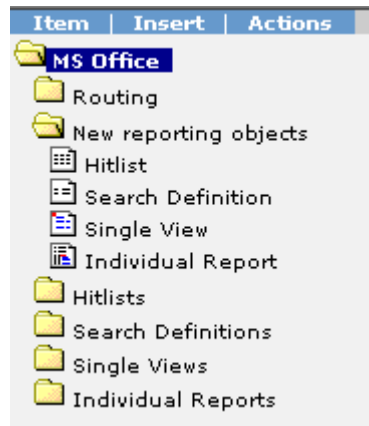


Figure 577: Individual Reporting Tree

22.2 Search Definitions

A Search Definition will be the criteria(s) the user may choose to filter his hitlist on. Only those respondents who satisfy the selection(s) made in the search definition will be shown in the hitlist.

You make a new search definition by dragging a "Search Definition" item from "New reporting objects" and dropping it on the "Search Definitions" folder, or by selecting "Insert->Search Definition" from the drop-down menu at the top of the page.

You define which fields to include in a search criteria by dragging 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.

Multi questions and grids have to be expanded by single clicking or using the expand button. Then you will get 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 like a single question with a Yes or No answer (or TRUE/FALSE). For grids each item is like a single question with the scale as answer list.

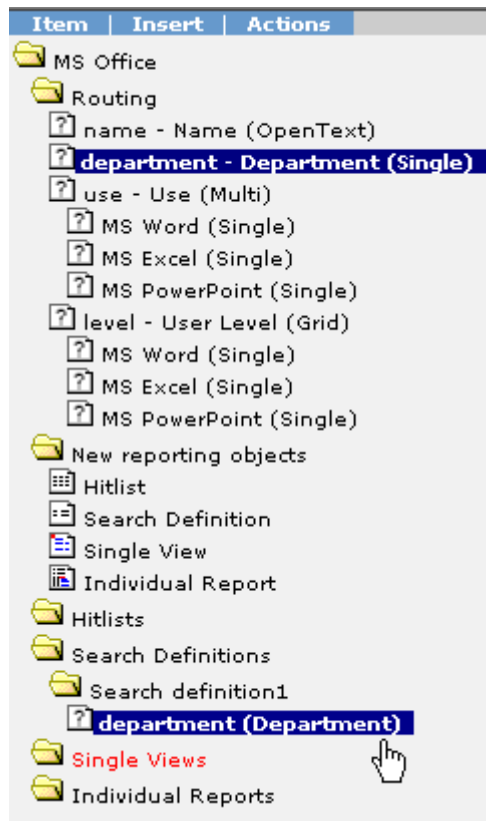


Figure 578: Dragging questions into a New Search Definition. Observe that the routing is expanded and that the multi "use" and grid "userlevel" is expanded into single question items.

The new Search Definition will have a properties window where the administrator can assign certain properties. You open it by double-clicking the Search Definition, or by right clicking the object and choosing *Edit* from the menu.

22.2.1 General – Search Definition Properties

The screenshot shows a software interface with a tree view on the left and a properties panel on the right. The tree view has a hierarchy: MS Office > Routing > name - Name (OpenText), department - Department, use - Use (Multi) > MS Word (Single), MS Excel (Single), MS PowerPoint (Single), level - User Level (Grid) > MS Word (Single), MS Excel (Single), MS PowerPoint (Single), New reporting objects > Hitlist, Search Definition, Single View, Individual Report, Hitlists, Search Definitions > Search definition 1 (selected), name (Name), department (Department), Single Views, Individual Reports. The properties panel is titled 'Search Definition - Search definition 1' and has tabs: General, Titles, Criteria, Languages, Save. The 'General' tab is active, showing 'General options' with a text box for 'Search definition name' containing 'Search definition1', a dropdown for 'Search operator' set to 'AND', and checkboxes for 'Predefined' and 'Deleted', both of which are unchecked.

Figure 579: Search Definition Properties - General

Properties to set on a search definition are:

Property	Description
Search definition name	A user defined value to identify the search definition.
Search operator	You can decide which search operator to use between items in search definitions based on more than one question. Possible operators are "AND" or "OR". Default is "AND".
Predefined	If "Predefined" is checked there must be one or more default values for every field in the search definition. The user of the report will not be able to change the search criteria on the predefined search definition in a report.

Table 63: Search Definition Properties

22.2.2 Titles for Search Definitions

The title of the search definition can be set in all the project languages under the Titles tab. There will be one text box for each active language.

22.2.3 Criteria

Search Definition - Name and Department

General Titles Criteria Languages Save

name (Name)

Width

Deleted ☐

department (Department)

Locked value(s)

- ☐ Sales
- ☐ Marketing
- ☐ Accounting

Multiple choice ☒

Deleted ☐

Figure 580: Search Definition Properties – Criteria for open text and single question

Open text question	Description
Width	The size of the textbox (in number of characters) where the user specifies the open text search.

Single question	Description
Locked value(s)	If you select one or more values here 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, which means that the link to the search definition will directly bring up a list of respondents in the hitlist, without the user having to specify the search.
Multiple choice	This property will give the user the opportunity to select multiple values to search on. The search will search for all values selected.

Table 64: Criteria Properties

Figure 581: Search Definition Properties: Criteria for multi question

Multi question	Description
Locked value(s)	If you select one or more values here 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, which means that the link to the search definition will directly bring up a list of respondents in the hitlist, without the user having to specify the search.

Table 65: Locked Values

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 answer list. The properties are consequently the same as the properties of a single question:

Figure 582: Search Definition properties – Criteria for grid question. Under General for this question we have selected "Predefined". Here we select the two best scores as locked scale value(s).

Grid question	Description
Locked value(s)	If you select one or more values here the question will be locked to one or more 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, which means that the link to the search definition will directly bring up a list of respondents in the hitlist, without the user having to specify the search.
Multiple choice	This property will give the user the opportunity to select multiple values to search on. The search will search for all values selected.

Table 66: Locked Values 2

22.2.3.1 Search Criteria within the Search Definition

You may also define search criteria separately for each question in the Search Definition. You can either double click the question or right click it and choose Edit from the menu in order to be able to edit its properties. The properties are very similar to those you may access by clicking Criteria when editing Search Definition properties.

The image shows two screenshots of a software interface for defining search criteria. The top screenshot is the 'Search Criteria - department (Department)' dialog box, 'General' tab. It has buttons for 'General', 'Titles', 'Languages', and 'Save'. Under 'General options', there's a list of 'Locked value(s)' with checkboxes for 'Sales', 'Marketing', and 'Accounting'. Below that, 'Multiple choice' is checked and 'Deleted' is unchecked. The bottom screenshot shows the same dialog box with the 'Titles' tab selected. It shows 'English' as the selected language and 'Department' as the title text.

Figure 583: Search Criteria Properties

Field	Description
General	Here you can set the search criteria properties. The same can be achieved when entering Criteria under Search Definition.
Titles	Each question (each search criterion) can be given a title that will be displayed in the Individual Report.
Languages	You may select the working languages here.
Save	Saves the last modifications.

Table 67: Search Criteria Properties

22.2.4 Languages in Search Definitions

When working with a multi-lingual project, you may want just to edit texts and titles for a selection of the languages. Then you may select the working languages here.

22.3 Hitlists

In the hitlist you specify what the table displaying the results from the searches should look like and what fields (questions) that should be included.

You make a new hitlist by dragging a "Hitlist" item from "New reporting objects" and dropping it on the "Hitlists" folder, or by selecting "Insert->Hitlist" from the drop-down menu at the top of the page.

You define which fields to include in a hitlist by dragging 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 shown to the user in the Individual Report.

Multi questions and grids have to be expanded by single clicking or using the expand button. Then you will get one node for each item in the answer list. You can treat these nodes as if they were ordinary single questions: For multis each item in the answer list is like a single question with a Yes or No answer (or TRUE/FALSE). For grids each item is like a single question with the scale as answer list.

22.3.1 General – Hitlist Properties

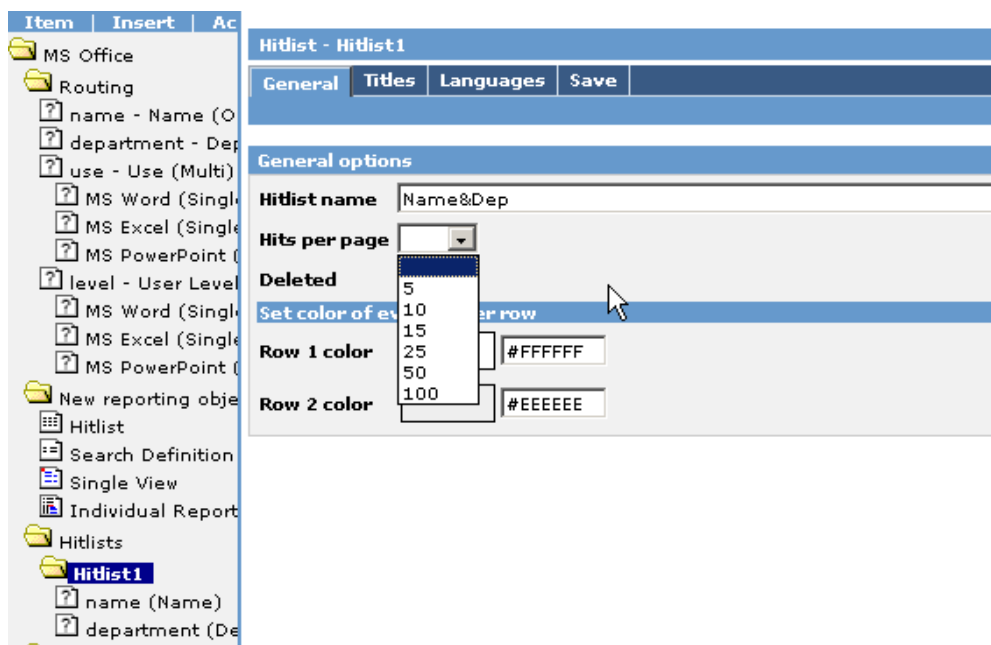


Figure 584: Hitlist properties – General

Properties to set on a hitlist are:

Property	Description
Hitlist name	A user defined value to identify the hitlist.
Hits per page	This will limit the size of the hitlist to a number of hits per page. If the hitlist is larger than the value set here, there will be a button to go to the next page of hits.
Set color of every other row.	Here you may specify two background colors for the rows in the hitlist. You can specify the HTML color code directly, or you can double-click the preview box to get a small 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.

Table 68: Hitlist Properties

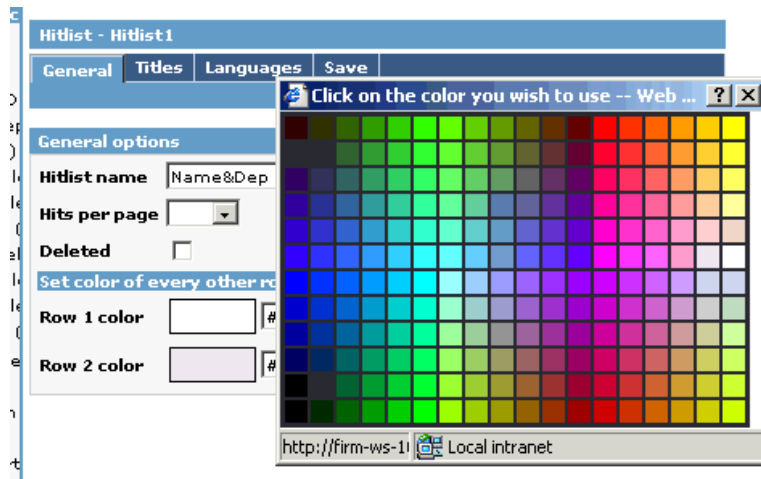


Figure 585: Hitlist properties – General – Color chooser

22.3.2 Titles for Hitlists

The title of the hitlist can be set in all the project languages under the Titles tab. There will be one text box for each active language.

22.3.3 Languages in Hitlists

When working with a multi-lingual project, you may want just to edit texts and titles for a selection of the languages. Then you may select the working languages here.

22.3.4 Hitlist Columns

If you doubleclick the questions inside the hitlist folder you can edit the settings for the columns of the hitlist.

22.3.5 General – Hitlist Column Properties

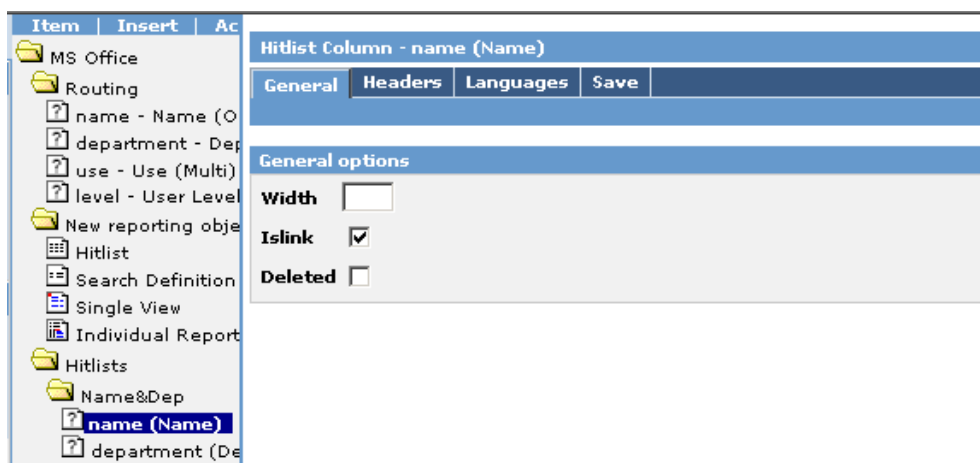


Figure 586: Hitlist Column properties – General

Property	Description
Width	The width of the column. Default value will adjust the column to show the text in a cell without wrapping it.
IsLink	This property will 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.

Table 69: Hitlist Column Properties

22.3.6 Headers

Here you can define the texts for the headers of the columns in the hitlist for the active languages.

22.3.7 Languages

When working with a multi-lingual project, you may want just to edit texts and titles for a selection of the languages. Then you may select the working languages here.

22.4 Single View

Single View is where you specify the answers that should be shown when selecting a single respondent in the hitlist. You make a new Single View by dragging a "Single View" item from "New reporting objects" and dropping it on the "Single Views" folder, or by clicking the "Single Views" folder and then selecting "Insert->Single View" from the drop-down menu at the top of the page.

Double clicking the new Single View or right clicking it and choosing Edit from the menu will bring you to the Single View Wizard.

Figure 587: Single View Wizard - Step 1

Field	Description
Single View Name	A user defined value to identify the Single View.
Single View Description	A more detailed description of the single view (may be left empty)
Deleted	This box will be checked when the item is soft deleted.
Cancel	Clicking this button will bring you one action back.
Next	Clicking this button will bring you to the Step 2 in Single View Wizard.
Back/Finish	These buttons are not active on this page.

Table 70: Single View Wizard - Step 1

Title	Label	Fieldnames	'Other' values	Type
Name		☒ name		opentext
Department		☒ department		single
Use	MS Excel	☒ use_2		multi
	MS PowerPoint	☒ use_3		multi
	MS Word	☒ use_1		multi
User Level	MS Excel	☒ level_2		grid
	MS PowerPoint	☒ level_3		grid
	MS Word	☒ level_1		grid
Satisfaction		☒ sat		single

Figure 588: Single View Wizard – Step 2

In Step 2 you will be able to choose the fields (questions and variables from the questionnaire) you wish to be displayed in the Single View. The HTML will be generated automatically for the chosen fields.

Field	Description
Select all	Clicking this button will select all the fields.
Unselect all	Clicking this button will unselect 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	Clicking this button will bring you to the Single View Wizard.
Back	Clicking this button will bring you back to Step 1.
Next	This button is not active on this page.
Finish	Clicking this button will save the chosen settings in Step 2 and bring you to the Single View Wizard menu.

Table 71: Single View Wizard Fields

22.4.1 Single View Editor

Double-click the new single view to open the "Single View Wizard" menu, or right click the object and choose *Edit* from the menu.

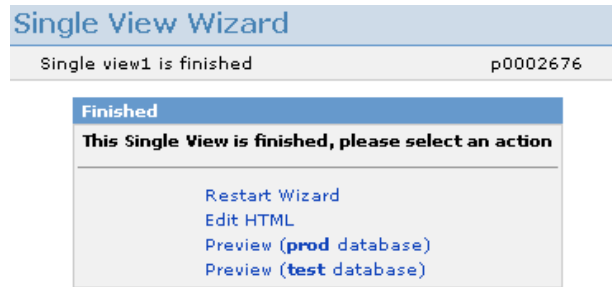


Figure 589: Single View Wizard Menu

Clicking on Edit HTML link will bring you to the Single View Editor.

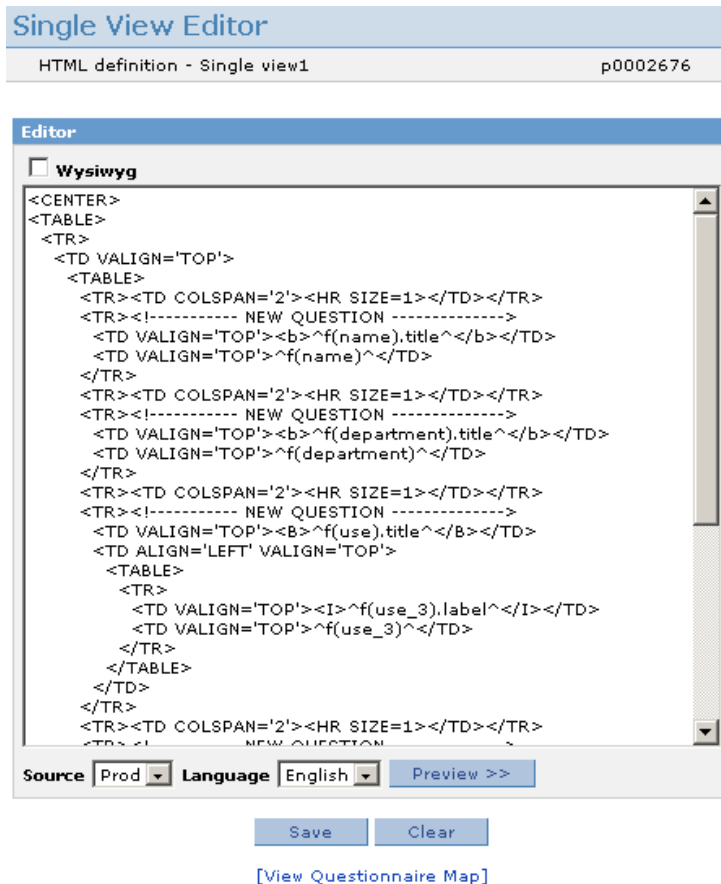


Figure 590: Single View Editor

Property	Description
Wysiwyg Requires Internet Explorer 5.5 or 6.0	"What you see is what you get": enabling this checkbox will display the labels and fieldnames and let you edit the Single View by changing these directly. You will be able to apply some layout modifications to the Single View as well.
HTML definition	This is where the HTML code of the single view frame is placed.
Source	The database is created when compiling a survey. Since this may have been done at different times for production and test databases, and there may have been changes in the questionnaire in between, the test and production databases may contain different fields. Here you select which of the databases to use fields (questions) from.
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 will show the field references you have used in the HTML definition. The responses from the first respondent will be used in the preview.

Table 72: Single View Editor Properties

When the Wysiwyg checkbox is activated, the Single View Editor will be displayed like the picture below.

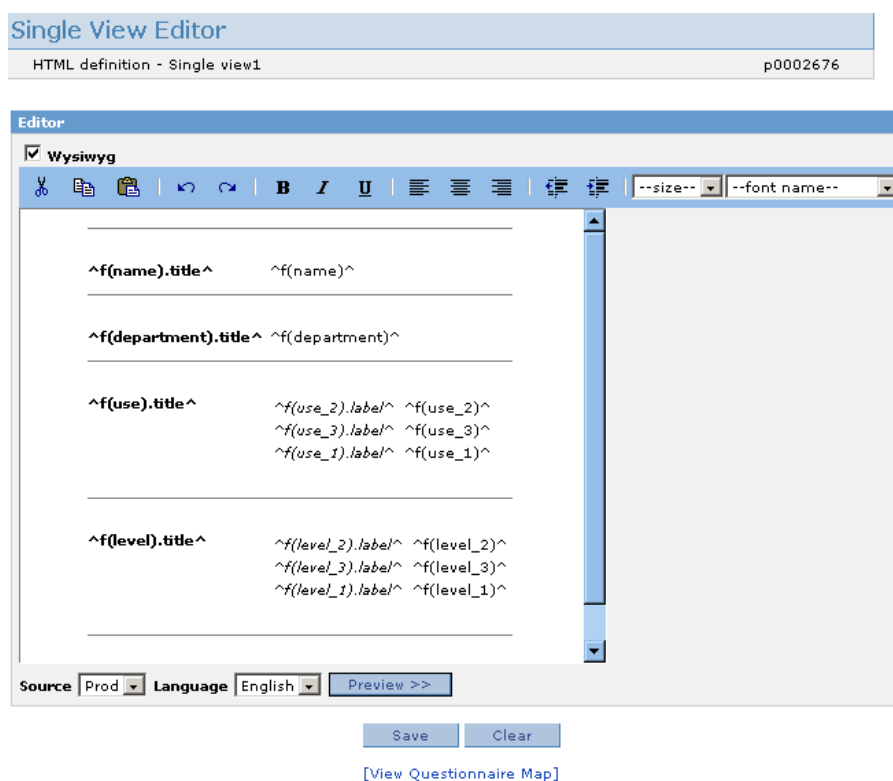


Figure 591: Single View Editor – Wysiwyg

22.4.1.1 Including Respondent Data in Single View

You can also include respondent data in the Single View, for example, respid: `f(respondent.respid)`; sid: `f(respondent.sid)`. The unique respondent link can be retrieved with `f(respondent.link)`. Read additional information in section 15.3.5 Synchronization.

22.4.2 Questionnaire map

To include titles, labels, fieldnames and values in the single view, you use syntax similar to the syntax you use for response piping in a survey. You 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, there is a questionnaire map available. When you click the "View Questionnaire Map" link, a new window will open with a table that contains all the questions from the survey, listing the variables you may use in your single view HTML definition.

Questionnaire map

Available fields from questionnaire p38971960

ID	Title	Loop ID	Title scripting	Label	Label scripting	Fieldnames	Fieldnames scripting	'Other' values	Type
name	Name	null	^f(name).title^			☒ name	^f(name)^		opentext
department	Department	null	^f(department).title^			☒ department	^f(department)^		single
use	Use	null	^f(use).title^	MS Excel	^f(use_2).label^	☒ use_2	^f(use_2)^		multi
				MS PowerPoint	^f(use_3).label^	☒ use_3	^f(use_3)^		multi
				MS Word	^f(use_1).label^	☒ use_1	^f(use_1)^		multi
level	User Level	null	^f(level).title^	MS Excel	^f(level_2).label^	☒ level_2	^f(level_2)^		grid
				MS PowerPoint	^f(level_3).label^	☒ level_3	^f(level_3)^		grid
				MS Word	^f(level_1).label^	☒ level_1	^f(level_1)^		grid
prodloop		null	^f(prodloop).title^	prodloop		☒ prodloop	^f(prodloop)^		loop
sat	Satisfaction	prodloop	^f(sat).title^			☒ sat	^f(sat)^		single

Figure 592: Questionnaire Map

Column	Description
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. Defaults to question id for single and open questions, 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	Clicking this button will select all the fields.
Unselect all	Clicking this button will unselect all the fields.
Generate HTML	Clicking this button will 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 (see picture below).

Table 73: Questionnaire Map Properties

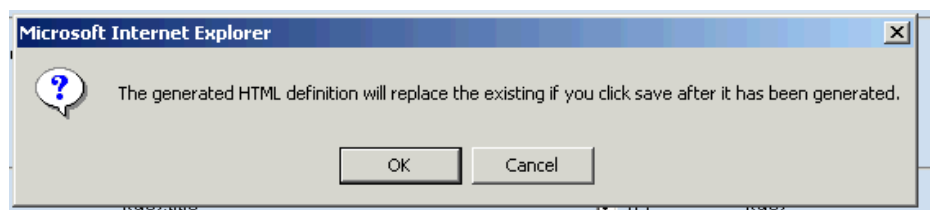


Figure 593: HTML Definition Warning

22.4.3 Preview

By selecting one of the preview links from the Single View Wizard menu, you get a preview of your HTML definition. The preview will be shown either with production data or test data, and will display the values from the first respondent in the database. The two screenshots show the difference. This HTML definition have been used in this example:

```
< <CENTER>
<TABLE>
<TBODY>
<TR>
<TD vAlign=top>
<TABLE>
<TBODY>
<TR>
<TD colSpan=2>
<HR SIZE=1>
</TD></TR>
<TR><!------- NEW QUESTION ----->
<TD vAlign=top><B>^f(department).title^</B></TD>
<TD vAlign=top>^f(department)^</TD></TR>
<TR>
<TD colSpan=2>
<HR SIZE=1>
</TD></TR>
<TR><!------- NEW QUESTION ----->
<TD vAlign=top><B>^f(name).title^</B></TD>
<TD vAlign=top>^f(name)^</TD></TR>
<TR>
<TD colSpan=2>
<HR SIZE=1>
</TD></TR>
<TR><!------- NEW QUESTION ----->
<TD vAlign=top><B>^f(use).title^</B></TD>
<TD vAlign=top align=left>
<TABLE>
<TBODY>
<TR>
<TD vAlign=top><I>^f(use_2).label^</I></TD>
<TD vAlign=top>^f(use_2)^</TD></TR>
<TR>
<TD vAlign=top><I>^f(use_3).label^</I></TD>
<TD vAlign=top>^f(use_3)^</TD></TR>
<TR>
<TD vAlign=top><I>^f(use_1).label^</I></TD>
<TD vAlign=top>^f(use_1)^</TD></TR></TBODY></TABLE></TD></TR>
```

```

<TR>
<TD colSpan=2>
<HR SIZE=1>
</TD></TR>
<TR><!------- NEW QUESTION ----->
<TD vAlign=top><B>^f(level).title^</B></TD>
<TD vAlign=top align=left>
<TABLE>
<TBODY>
<TR>
<TD vAlign=top><I>^f(level_2).label^</I></TD>
<TD vAlign=top>^f(level_2)^</TD></TR>
<TR>
<TD vAlign=top><I>^f(level_3).label^</I></TD>
<TD vAlign=top>^f(level_3)^</TD></TR>
<TR>
<TD vAlign=top><I>^f(level_1).label^</I></TD>
<TD vAlign=top>^f(level_1)^</TD></TR></TBODY></TABLE></TD></TR>
<TR>
<TD colSpan=2>
<HR SIZE=1>
</TD></TR></TBODY></TABLE></TD></TR></TBODY></TABLE></CENTER>

```

Single View Editor

Preview p38971960

<<

Name	Sara Jones	
Department	Customer Services	
Use	MS Excel	x
	MS PowerPoint	-
	MS Word	x
User Level	MS Excel	4
	MS PowerPoint	1 Beginner
	MS Word	5 Expert
Satisfaction	MS Word	Quite satisfied
	MS Excel	Quite satisfied

<<

Figure 594: Preview with values from 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 Report

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 like in a project, combining different search definitions, hitlists and single views.

You make a new individual report by dragging a “New Individual Report” item and dropping it on the “Individual Reports” folder, or by clicking the “Individual Reports” folder and then selecting “Insert->Individual Report” from the drop-down menu at the top of the page.



Figure 595: Adding a New Individual Report

22.5.1 Individual Report Wizard

Figure 596: Individual Report Wizard

By double-clicking the new individual report you open the "Individual Report Wizard" that guides you in setting up your individual report. You can also right click the object and choose *Edit* from the menu.

It is possible to filter results based on respondent status, and create "filters" that are linked to values associated with the End User who is accessing the Individual Report. The filters will only be active for protected reports.

Field	Description
Filter by	Any single or open question can be used as a filter. 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
Filter type	The "Filter by" value will be compared to one or more value(s) determined by Filter type <u>End user login</u> The End User will only see responses where the value of the "Filter by" question matches his/her username. <u>End user permission</u> If "End user permission" is selected a Permission link will appear in the Users tab in the End Users... - Reports properties page (see below). 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 (see below). If more than one, the values should be separated by semi colon. The values are set per End User.
Responses	Possibility to show only completes, only incompletes or both.

Table 74: Filter types

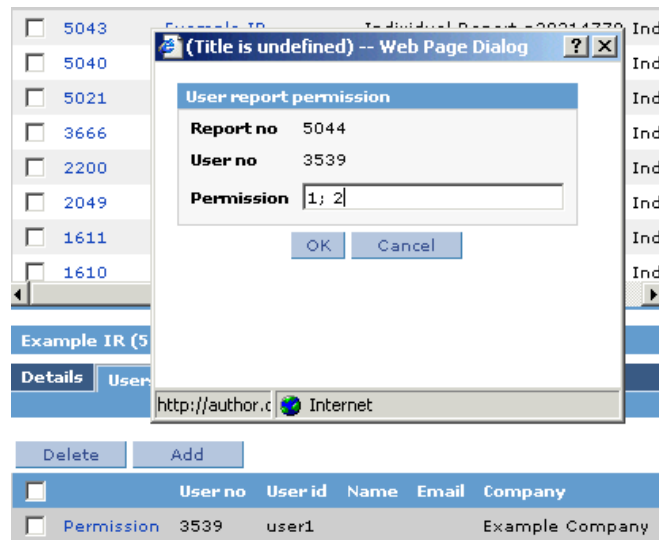


Figure 597: Filter type - end user permission

22.5.1.1 Step 1 – Select reporting objects

Here you give your individual report a name, and pick one or more search definition, one hitlist and one single view to use in your individual report.

Select search definitions by clicking on them and use the >> and << buttons to move them from "Available" to "Selected". You can select several adjacent search definitions by clicking on one of the search definitions and then pressing "SHIFT" while clicking on another. To select several search definitions that are not adjacent you can press "CTRL" while clicking the search definitions. You can also move single search definitions between the boxes by double-clicking them.

Hitlists and single view are to be picked from the drop downs. When you have made your selections, click "Next>>".

In our example we will pick all search definitions, and the hitlist and single view we have defined.

The search definition links will appear in the order from the "Selected" box. If you want to change the order, you can click one of them and use CTRL and the up and down arrow buttons to move it.

Individual Report Wizard

p56176021

STEP 1 - Select reporting objects

Individual Report Name

Individual report1

Search Definitions

Available

>>

<<

Selected

Search definition1

Search definition2

Search definition3

Hitlist

Result

Single View

Single view1

Deleted

☐

Filter properties

Filter by

q1 (Single)

Filter type

End user permission

Responses

Both

Cancel

< Back

Next >

Finish

Figure 598: Individual Report Wizard Step 1 - Select reporting objects

22.5.1.2 Step 2 – Set title for each language

In step 2 you have to specify a title for the report for every active survey language.

In this example the survey is just done in one language, English.

Individual Report Wizard

p0002676

STEP 2 - Set title for each language

English

MS Office Use and User Levels

Cancel

< Back

Next >

Finish

Figure 599: Individual Report Wizard Step 2 - Set title for each language

22.5.1.3 Step 3: Select layout and set properties

In step 3 you select the layout for the frames the individual report should consist of. 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 you can specify are:

Property	Description
Allow frame resize	The user will be able to resize the frames by dragging the frame borders.
Show frame borders	Displays borders between the frames

Table 75: Layout Properties

Individual Report Wizard

p0002676

STEP 3 - Select layout and set properties

Please select a report layout















Allow frame resize ☒

Show frame border ☒

Cancel

< Back

Next >

Finish

Figure 600: Individual Report Wizard Step 3: Select layout and set properties

22.5.1.4 Step 4: Set properties for each frame

In this step you specify which part should be in which frame, the size of the frames and the background color and background image.

Select the frame you want to specify settings for by clicking on it in the small preview. The frame you select will be highlighted in red. Then select its content (search definitions, hitlist or single view).

The size is specified in percentages of the window size. For background color you can either specify an HTML code directly, or double-click the color preview box to get 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. For background image you may specify the url to an image (optional).

Individual Report Wizard

p0002676

STEP 4 - Set properties for each frame



= current frame

- Select properties for the current frame
- Click a new frame to save the current frame and move to the next one

Select content

☒ Search Definition(s)
☐ Hitlist
☐ Single View

Size

20%

Background properties

Color

 #FF3399

Image URL

Cancel

< Back

Next >

Finish

Figure 601: Individual Report Wizard Step 4: Set properties for each frame (Search definitions)

After setting the properties for the first frame, move to a new frame by clicking on it in the small preview. Previously selected content will now not be available (in red font). If you move your mouse on content that is already selected the frame which has been selected will appear in yellow in the small preview.

Individual Report Wizard

p0002676

STEP 4 - Set properties for each frame

■ = current frame

- Select properties for the current frame
- Click a new frame to save the current frame and move to the next one

Select content

- ☐ Search Definition(s)
- ☒ Hitlist
- ☐ Single View

Size: 30%

Background properties

Color: #FF33CC

Image URL:

Cancel < Back Next > Finish

Figure 602: Individual Report Wizard Step 4: Set properties for each frame (Hitlist)

The size of the frame will automatically update when you select size. Frames on the same axis have to add up to 100%, so changing one of them will update the other.

Individual Report Wizard

p0002676

STEP 4 - Set properties for each frame

■ = current frame

- Select properties for the current frame
- Click a new frame to save the current frame and move to the next one
- Click Finish to complete the report

Select content

☐ Search Definition(s)

☐ Hitlist

☒ Single View

Size: 70%

Background properties

Color: #FFCCFF

Image URL:

Cancel < Back Next > Finish

Figure 603: Individual Report Wizard Step 4: Set properties for each frame (Single view)

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

After going through the wizard you have two options for modifying it. One is to restart the wizard, and the other is to edit the generated HTML. If you choose to restart the wizard, you can repeat the procedure from the last section with your previous settings. Exit the wizard by clicking **Finish**.

Individual Report Wizard

p0002676

Finished

This Individual Report is finished, please select an action

[Restart Wizard](#)

[Edit HTML](#)

[Publish Report \(prod database\)](#)

[Publish Report \(test database\)](#)

Figure 604: Finished Report

You may want to do some modifications to the HTML code in the frames, which is not possible in the wizard. To do so, choose **Edit HTML** to open the Individual Report Editor.

Here you can edit the HTML of the frames and the individual report. There is one textbox for the HTML code of the frame, and one for the HTML of the page setting up the frameset. 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:

Primitive	Description
^SD^	Search definitions
^H^	Hitlist

^S^	Single view

Table 76: Primitive List

Be very careful when editing the HTML definition of the report. Do not change the source references (src='content.asp?...') or frame names.

![Screenshot of the Individual report editor interface. The window title is 'Individual report editor'. It has a menu bar with 'Define HTML for each frame' and a text field 'p0002676'. Below is a 'Properties' section with a diagram showing a red bar at the top of a frame, labeled '= current frame'. Below the diagram are two bullet points: 'Define HTML for the current frame and for the current Individual Report' and 'Click a new frame to save and move to the next frame'. Then is a 'List of primitives' box containing 'SD Search Definition(s)', 'H Hitlist', and 'S Single View'. Below that is a section 'HTML Definition of current frame' with a text area containing: '<BODY BACKGROUND=\](\"content.asp?singleviewframe=3&l\"></frame></frameset></HTML>'."/)

Figure 605: Individual Report Editor

22.6 Recovering deleted items

All items in Individual Reporting can be deleted by clicking the item and pressing delete or selecting Item -> Delete from the drop-down menu at the top of the page. You can also right click the object and choose *Delete* from the menu. To recover deleted items, double-click the topmost node in the tree (the one with the project name), select Show deleted nodes and click save.

Figure 606: Show deleted nodes

If you reopen the tree, deleted nodes will now appear in gray. If you double-click a deleted node, "Deleted" will be checked off in properties. Uncheck this property and click save to restore it.

Note: If you delete an item, which is gray (the "deleted" property is set) it will be permanently deleted.



Figure 607: Restoring a deleted item

22.7 Publishing the Individual Report

When you are finished with the modifications on your report, you may publish it. You can choose between publishing the report with the test or production database. (The databases are created when compiling a survey. Since this may have been done at different times for production and test databases and there may have been changes in the questionnaire in between, the test and production databases may contain different fields.)

Publishing will bring you directly to the End User Interface (see chapter 24 The Login Interface for End Users).

22.8 Individual Reporting User Interface

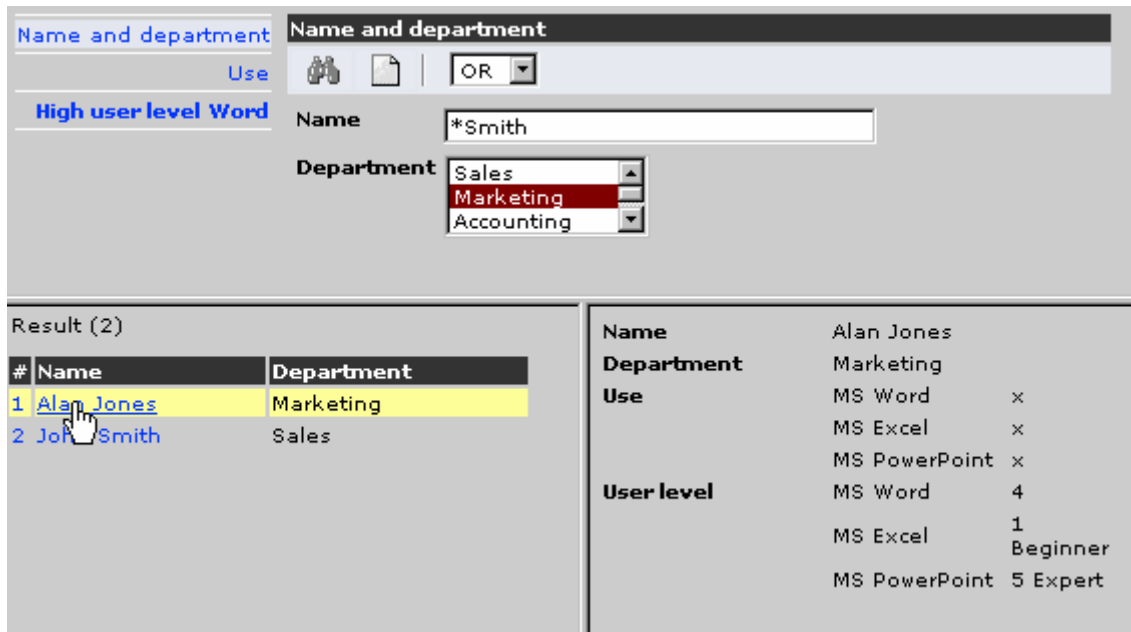
Name and department	
Use	AND
Name	*Smith
Department	Sales
Marketing Accounting	
Result (1)	
#	Name
1	John Smith
	Department
	Sales
Name	John Smith
Department	Sales
Use	MS Word x
	MS Excel -
	MS PowerPoint x
User level	MS Word 4
	MS Excel 1
	MS PowerPoint 3

Figure 608: User interface

The end user may choose from the different search definitions by clicking the links. In the search definitions frame the different fields will open. After defining his search the user clicks this button:  to do the search. The result will appear in the hitlist frame. To see the answers of one respondent, the user can click on the link (here the respondent's name) and see the answers in the single view frame.

Press  to clear the search.

The user 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 have to be satisfied.)



#	Name	Department
1	Alan Jones	Marketing
2	John Smith	Sales

Name	Alan Jones
Department	Marketing
Use	MS Word x
	MS Excel x
	MS PowerPoint x
User level	MS Word 4
	MS Excel 1
	MS PowerPoint 5
	Beginner Expert

Figure 609: Search with OR

22.8.1 Open Text search



Figure 610: Open text search

For open text questions, the user will be presented with a text box to specify his search. * can be used as wildcard. 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 where he/she can select one item by clicking it, and several adjacent items by clicking on one of them and then pressing "SHIFT" while clicking on another. To select several items that are not adjacent the user can press "CTRL" while clicking the items he wants.



Figure 611: Multiple choice search

22.8.3 Single choice search

If multiple choice is not selected for a search criteria, it will default to single choice where the user will be presented with a dropdown where he can pick one of the items.

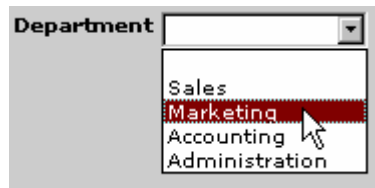


Figure 612: Single choice search

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 can choose between True (answered) or False (not answered).

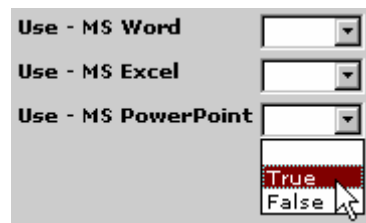


Figure 613: Search on items in a multi question

22.8.5 Predefined Search

When selecting a predefined search, the result is directly displayed in the hitlist.

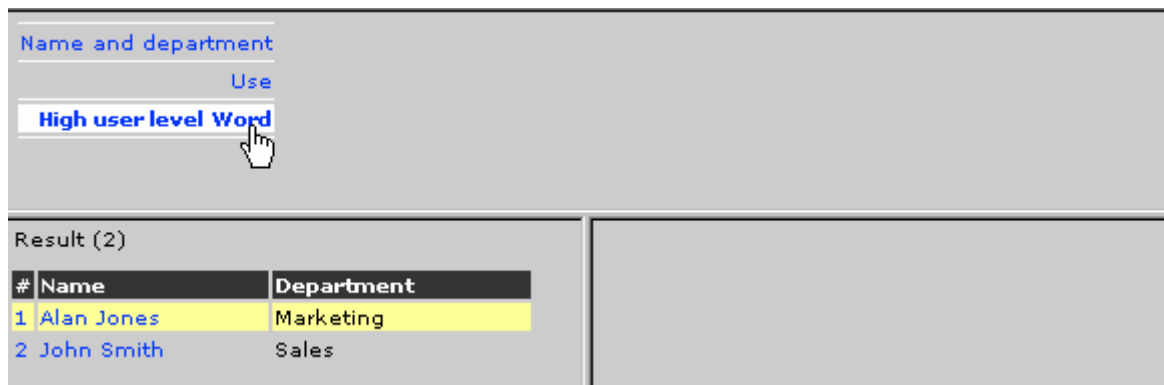


Figure 614: Predefined search

22.8.6 Sorting the hitlist

If the column header is clicked, the hitlist will be sorted on that column. First the order will be ascending, when clicked again the order will be descending. This is indicated with small arrows.

Result (2)

#	Name ▼	Department
2	John Smith	Sales
1	Alan Jones	Marketing

Figure 615: 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 Administration interface functionality.

The administration interface controls the handling of Lists and Projects, and defines how Companies, Users, Groups, and Reports are linked to them. End Users can view the reports, to which they have been given access via this interface, by entering the link to the End Users login page. See section 23.5.1 How to Access a Published Online Report.

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 following figure visualizes the End Users administration interface:

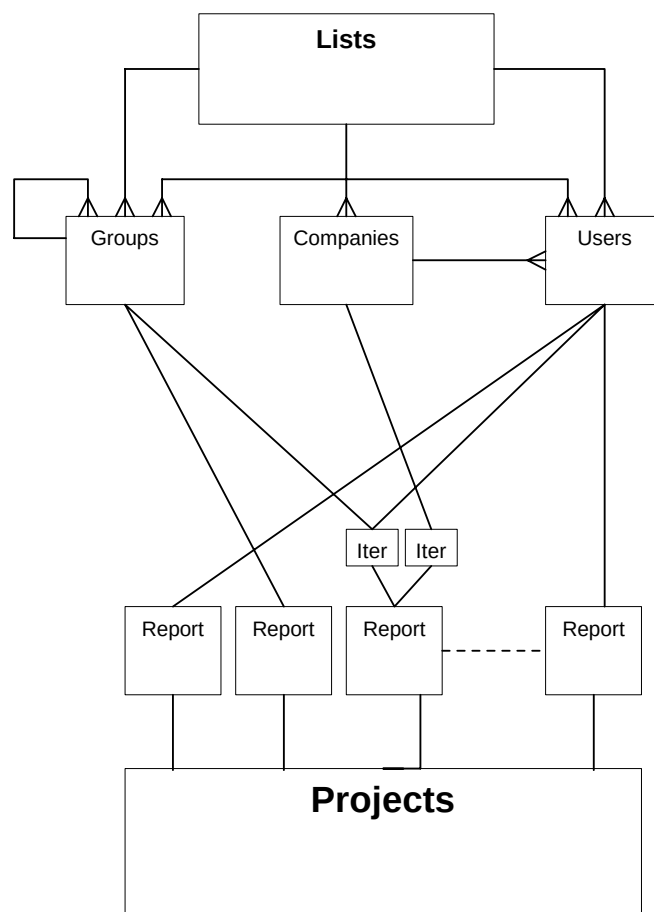


Figure 616: The End User administration interface

There are two “top” levels – Lists and Projects.

- **Lists** – one or more groups, companies and/or users are connected to a list.
 - **Group** - a collection of Users and/or other Groups. Groups can be given access to reports and report iterations.
 - **Companies** - companies can consist of one or more users.
 - **Users** - users must belong to a company, so the appropriate company must be created first. A user can only belong to one company within a list. Users can be given access to reports and iterations.

- **Projects** – a project will normally result in one or more reports. Users and/or groups of users can be allocated access to the reports and report iterations.
 - **Outline Reports** - none, one or many reports can belong to a project. A report can be connected to Groups, Users and Companies.
 - **Iterations** - a report can be constructed such that different users are able to see different information depending on their access permission. These different versions of the report are called “Iterations”.

23.1 The General Procedure

The general procedure is as follows:

1. Create a list. See section 23.4 How to Create a New End User List.
2. In the list, create a company. See section 23.7.1 How to Add a New Company.
3. Register end users in the company. See section 23.8.1 How to Add a New User to a List.
4. Collect end users into groups as required. See section 23.9.2.1 How to Add a User to a Group.
5. Register reports and report iterations. See section 20 Aggregated Reporting.
6. Link reports and report iterations to companies, groups and end users. See section 23.8.5.

23.2 The End Users Menu

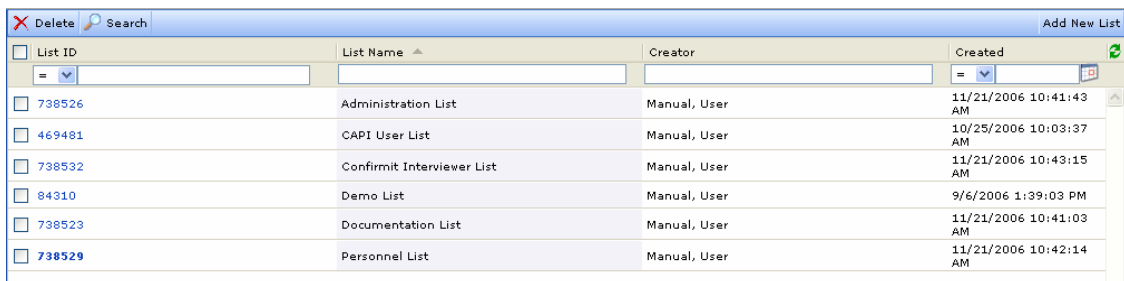
The **End Users** menu contains the following items:

- **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 Figure 617.



List ID	List Name	Creator	Created
738526	Administration List	Manual, User	11/21/2006 10:41:43 AM
469481	CAP I User List	Manual, User	10/25/2006 10:03:37 AM
738532	Confirmit Interviewer List	Manual, User	11/21/2006 10:43:15 AM
84310	Demo List	Manual, User	9/6/2006 1:39:03 PM
738523	Documentation List	Manual, User	11/21/2006 10:41:03 AM
738529	Personnel List	Manual, User	11/21/2006 10:42:14 AM

Figure 617: 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, type

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 618: 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 619: 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.

- To add a company to a list, see section 23.7.1 How to Add a New Company to a List.
- To add Users to a list, see section 23.8.1 How to Add a New User to a List.

23.5 The General Tab

See Figure 618 for an example. 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 23.5.1 How to Access a Published Online Report). 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, see Figure 617.

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 Figure 618), 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 (see section 23.8.7 How to Send Emails to End Users). 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.

Please Log In

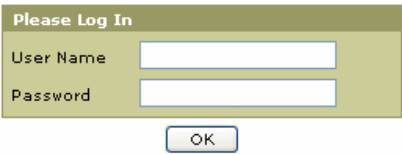


Figure 620: The login dialog

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.

Report Overview

Projects	Reports
» p0084225 - EndUserList	Demo Title - BMW Pivot View 1 Demo Individual Report 1

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

Figure 621: Example of the Report Overview window

- To view a report, click the appropriate link in the Reports column.

23.5.1.1 How an End User can Change Their Settings - The User Settings Link

The **User Settings** link opens a dialog with two options:

User settings

User settings

Select language

Open in new window ☒

OK

Figure 622: The User Settings dialog

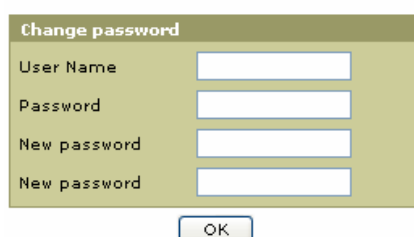
- Select Language** – on initial registration in a list, each user is assigned a default language (see also section 23.8.1 How to Add a New User to a List). If a report to which the user has access is created in that language, then the user will receive it automatically. The user and/or the administrator 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.

23.5.1.2 How an End User can Change Their Password - The Change Password Link

The end user may change his/her password at any time.

- Click the link to open the Change Password dialog.

Change password



A dialog box titled "Change password" with a light green background. It contains four input fields: "User Name", "Password", "New password", and "New password" (repeated). Below the fields is an "OK" button.

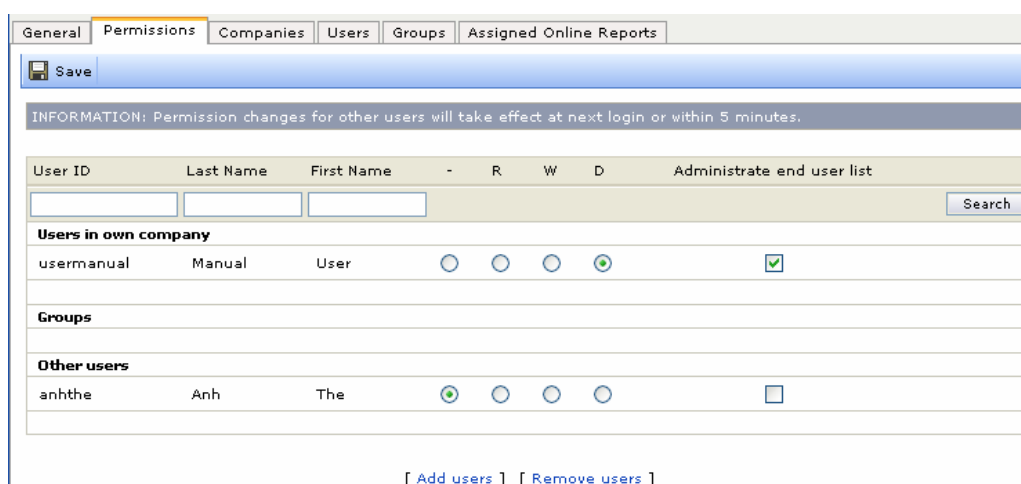
Figure 623: The Change Password dialog

2. Type your user name and existing password into the appropriate fields to identify yourself, then type your new password twice into the lower fields (typing it twice ensures you have typed it correctly the first time).
3. On completion, click **OK** to register the new password.

Note: See also section 23.8.3 How to Change an End User's Password.

23.6 The Permissions Tab

Note: If you do not have Administrator permission in this tab, you will not be able to access it.



The "Permissions" tab of the "End User List" editing window. It features a "Save" button, an information message, and a table of users with administrative permissions. The table has columns for User ID, Last Name, First Name, and checkboxes for Read (R), Write (W), Delete (D), and "Administrate end user list".

User ID	Last Name	First Name	-	R	W	D	Administrate end user list
Users in own company							
usermanual	Manual	User		☐	☐	☐	☒
Groups							
Other users							
anhthe	Anh	The		☒	☐	☐	☐

[Add users] [Remove users]

Figure 624: 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 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 a Key property. Copy this key to your clipboard.

The screenshot shows the 'Details' page for a user. The 'Key' property is highlighted with a red circle. The 'Key' value is a long alphanumeric string: 'P0EE0VVEH0X0NTR0M0R0000'. Other visible fields include 'Created' (Tuesday, July 04, 2006 8:42:02 AM), 'Created by' (huyennguyen), 'Modified' (Thursday, August 17, 2006 5:22:21 AM), 'Modified by' (huyennguyen), 'Converted', 'Password' (with a '[Reset password]' link), 'Expires (y/m/d)' (with three empty input boxes), 'External username' (with an empty input box), and 'Public encryption key' (with a '[Set key]' link). A 'Selected' checkbox is at the bottom.

Figure 625: 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

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.

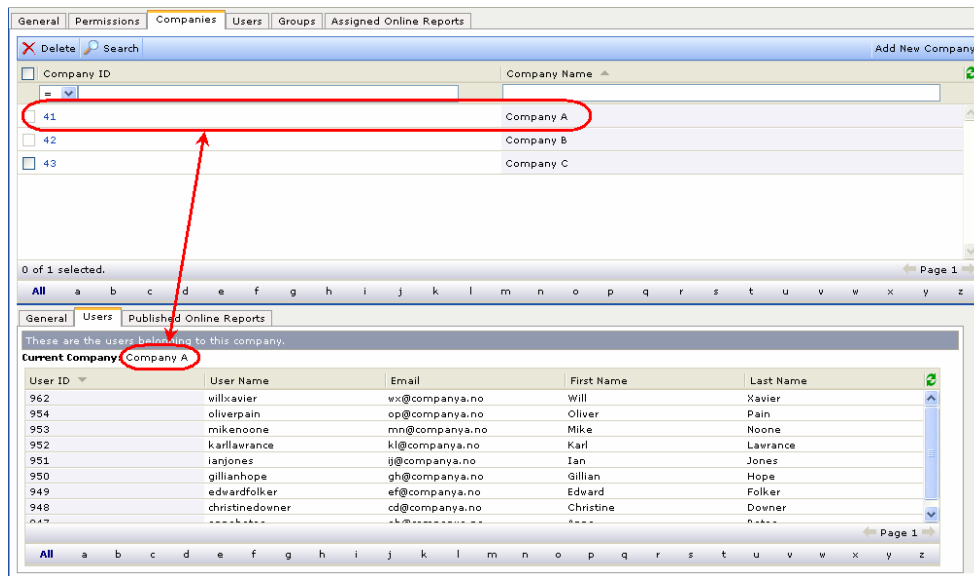


Figure 626: Example of the Companies tab

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 627: 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. See section 23.7 The Companies Tab for further details on registering companies. 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.

General Permissions Companies Users Groups Assigned Online Reports						
Delete Search Group Filter Send Emails Upload Users Add Users						
User ID	User Name	Email	First Name	Last Name	Company	
☐ 962	willxavier	wx@companya.no	Will	Xavier	Company B	
☐ 961	karenlien	kl@companyb.no	Karen	Lien	Company B	
☐ 960	irenejake	ij@companyb.no	Irene	Jake	Company B	
☐ 959	yolandzimmerman	yz@companyb.no	Yoland	Zimmerman	Company B	
☐ 958	sandratrent	st@companyb.no	Sandra	Trent	Company B	
☐ 957	ellenflyer	ef@companyb.no	Ellen	Flyer	Company B	
☐ 956	charliedoone	cd@companyb.no	Charlie	Doone	Company B	
☐ 955	andybrown	ab@companyb.no	Andy	Brown	Company B	
☐ 954	oliverpain	op@companya.no	Oliver	Pain	Company B	
0 of 16 selected. Page 1						
All a b c d e f g h i j k l m n o p q r s t u v w x y z						

Figure 628: 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.

Save Close

Add Users

Company Company A Language English

User Name	Password	Email	First Name	Last Name	Comment	
						Remove

Add 1 rows

Figure 629: 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 (see section 23.5.1.2 for further details), and you as the administrator can change a user's password if necessary (see section 23.8.3).
7. Add the user's email address, first and last names, and any comments or notes. These will be visible in the user's Details page – see section 23.8.2 How to Edit the User Information

Figure 630: 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 631: Example of a details page for a user

On the General tab you can change the user's password and edit the remaining information as required. Use the Groups tab to attach groups to the user (see section 23.8.4.1 How to Attach a Group to a User) and the Published Online Reports tab to give the user access to reports (see section 23.8.5 The Users > Details Page > Published Online Reports Tab).

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.

The page shown in Figure 632 opens.

General Groups Published Online Reports

Assign groups to the current user.

Current User: sandratrent

Save

Available items		Selected items	
☐	Group ID	Group ID	Group Name
☐	28		Group 1
☐	29		Group 2
☐	30		Group 3
☐	31		Group 4

>> <<

Figure 632: 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.

General Groups **Published Online Reports**

Add Published Reports from the current project to this group. The reports will then be available to all users in this group.

Current User: sandratrent

Save

Available Reports in Current Project

☐ ▲ Report ID	Report Name	Report Type	Project ID
☐ 1	DemoReport1	Published Report	p0084225

>> <<

Assigned Reports from all Projects

☐ Report ID	Report Name	Report Type	Project ID
☐ 3	Demo Individual Report 1	Individual Report	p0084225
☐ 2	Pivot View 1	Pivot View	p0084225

Figure 633: 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 Figure 633 opens.
3. In the Available Items column, check the box beside the report(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.

23.8.5.2 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 Figure 634.

General Groups **Published Online Reports**

Add Published Reports from the current project to this group. The reports will then be available to all users in this group.

Current User: sandratrent

Save

Available Reports in Current Project

☐ ▲ Report ID	Report Name	Report Type	Project ID
☐ 3	Demo Individual Report 1	Individual Report	p0084225

>> <<

Assigned Reports from all Projects

☐ Report ID	Report Name	Report Type	Project ID
☐ 2	Pivot View 1	Pivot View	p0084225
☐ 1	Iterations DemoReport1	Published Report	p0084225

Figure 634: 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.

http://author.testlab.firmglobal.net - Microsoft Internet Explorer

Save Save and Close Close

Available items

☐ ▲ Iteration Code	Title
☐ 1	BMW
☐ 2	AUDI
☐ 3	SAAB
☐ 4	VOLVO
☐ 5	VW
☐ 6	FIAT

>> <<

Selected items

☐ Iteration Code	Title

Done Internet

Figure 635: 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 lists of end users.

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.

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

Table 77: The required fields in an End User List file

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 Figure 636.

Figure 636: Upload end users

- **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?
- 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.

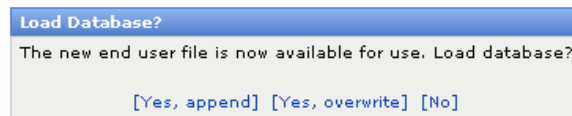


Figure 637: The Load database dialog

- 7. 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 fieldnames in the first row (they will be ignored).
- The order of the fields is different as compared to the order of the fields as listed in Table 77.

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.

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 Figure 638. Use this dialog to write the subject and the body of the email and select the required options.

Figure 638: The Email Properties dialog

- **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 Figure 618) in the email.
 - **Include Reportal link** – check this box to include the link to Reportal (the Reportal Options URL in Figure 618) 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 in Figure 639. 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.

Note! 22 users will receive this email

Email Preview	
To	user@company.com
From	documentation@confirmit.com
Subject	Example email
Body HTML	This is an example of an email, to be used as an illustration in the User Manual. User id: UserName Password: User's Password Portal id: 88922 http://survey.testlab.firmglobal.net/customer/login/login.asp?listid=88922 http://survey.testlab.firmglobal.net/confirm/reportal/login.aspx?portalid=88922

Figure 639: 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.
7. The Task Properties dialog opens. Here you set when you want the email to be sent.

Task Properties	
Comment	
Start Time	ASAP v

Figure 640: 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.
8. 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.

Recurrence pattern	
Properties	Recur
Initial start time = 9/25/2006 11:21:21 AM	
New start time ☐ Disable task (clear queue) ☐ ASAP ☒ 0:00 25 9 2006	
Recurring task No	
Save	

Figure 641: 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 Conformat, 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.

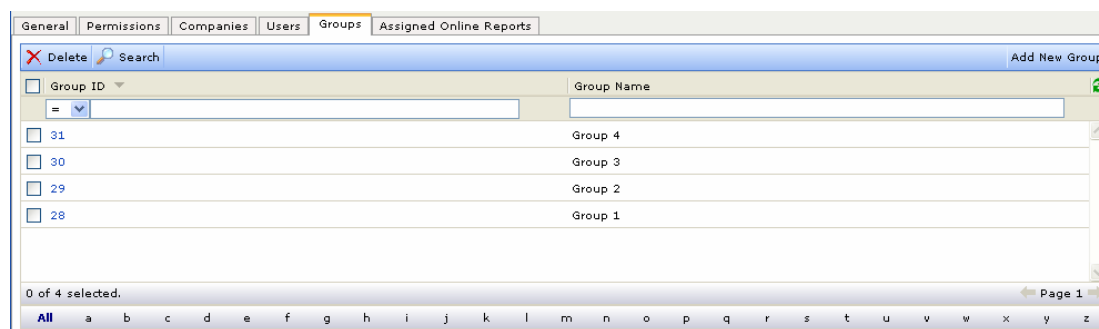


Figure 642: Example of the Groups tab

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.

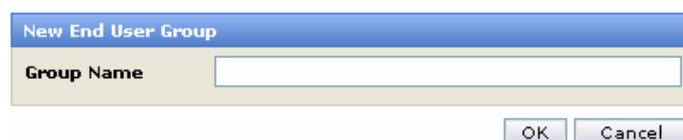


Figure 643: The New End User Group dialog

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. Conformat 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. For more information on how to register users, see section 23.8.1 How to Add a New User.
- **Groups** – use this tab to add groups to the group. For more information on how to register groups, see section 23.9.1 How to Add a New Group to the List.

- **Published Online Reports** – use this tab to add published online reports to the group. For more information on how to register published online reports, see section 20 Aggregated Reporting.

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.

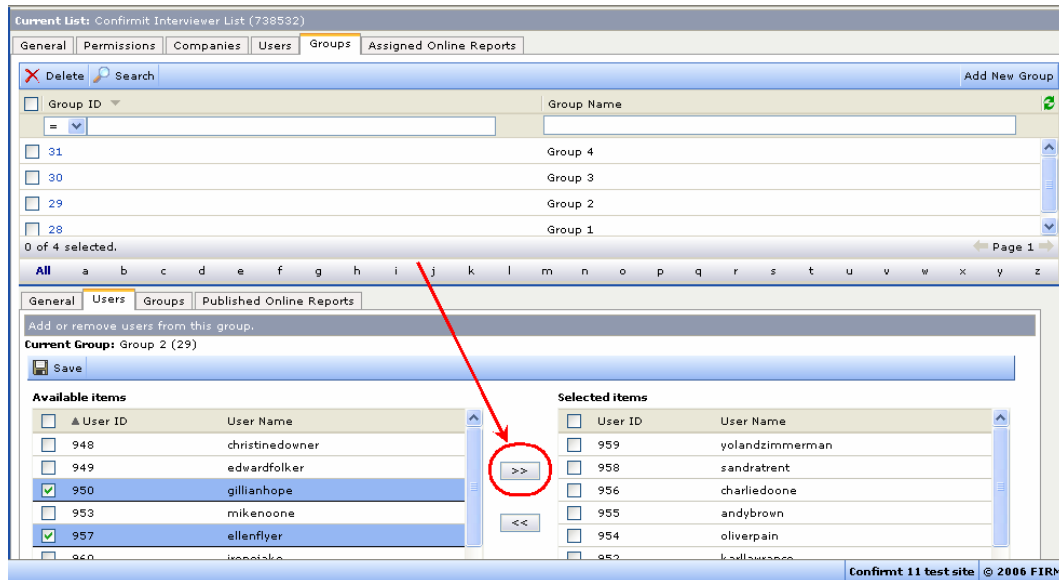


Figure 644: Example of the Groups > Users tab

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.

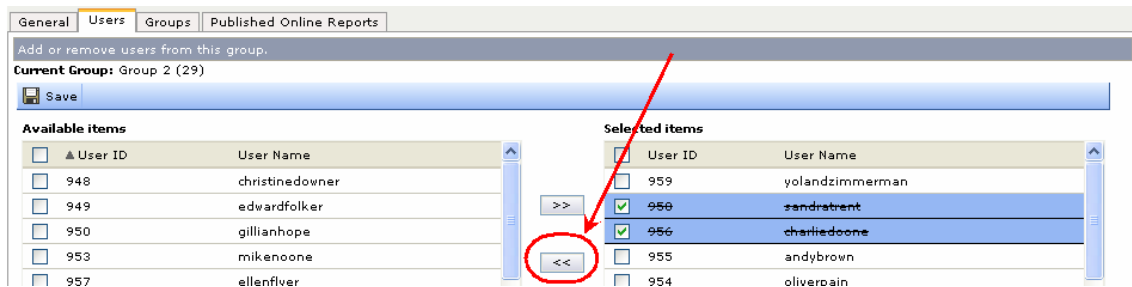


Figure 645: Removing users from a Group

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.

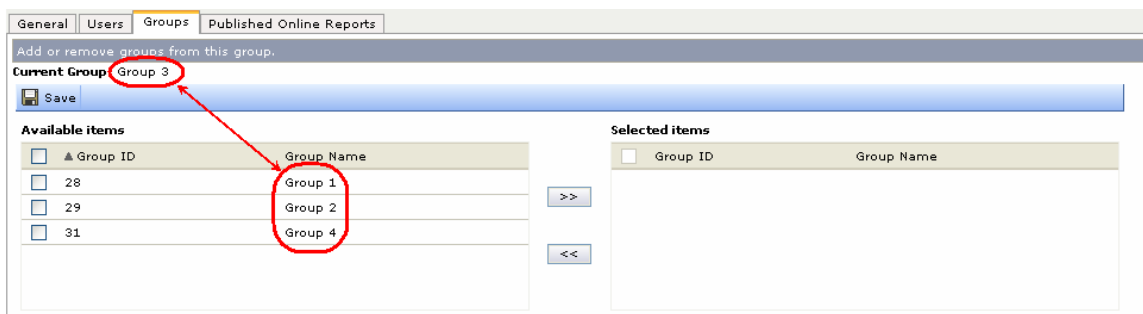


Figure 646: Example of the Groups tab for a group

- 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.

- On the Details page, go to the **Published Online Reports** tab.
The page shown in Figure 647 opens.

General Users Groups **Published Online Reports**

Add Published Reports from the current project to this group. The reports will then be available to all users in this group.

Current Group: Group 3

Save

Report ID	Report Name	Report Type	Project ID
29	Report 1	Published Report	p0462330

>>

<<

Report ID	Report Name	Report Type	Project ID
28	Report 2	Published Report	p0462330
27	Report 3	Published Report	p0462330

Figure 647: Example of the Groups > Published Online Reports tab

- In the **Available Reports...** column, check the box beside the report(s) you wish to link to the group.
 - Click the >> button to move the selected report(s) to the **Assigned Reports...** column.
 - 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 Figure 648.

General Users Groups **Published Online Reports**

Add Published Reports from the current project to this group. The reports will then be available to all users in this group.

Current Group: Group 4

Save

Report ID	Report Name	Report Type	Project ID
3	Demo Individual Report 1	Individual Report	p0084225

>>

<<

Report ID	Report Name	Report Type	Project ID
2	Pivot View 1	Pivot View	p0084225
1	Iterations DemoReport1	Published Report	p0084225

Figure 648: Example of a report with an iterations link

- 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.

http://author.testlab.firmglobal.net - Microsoft Internet Explorer

Save Save and Close Close

Iteration Code	Title
1	BMW
2	AUDI
3	SAAB
4	VOLVO
5	VW
6	FIAT

>>

<<

Iteration Code	Title

Done Internet

Figure 649: Example of a Report Iterations window

- 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.

General	Permissions	Companies	Users	Groups	Assigned Online Reports
These are the reports assigned to users in this list.					
Report ID ▾	Report Name	Report Type	Project ID	Project Name	Database
29	Report 1	Published Report	p0462330	Newspaper Survey for CAPI	Production
28	Report 2	Published Report	p0462330	Newspaper Survey for CAPI	Production
27	Report 3	Published Report	p0462330	Newspaper Survey for CAPI	Production

Figure 650: Example of the Assigned Reports tab

24 The Login Interface for End Users

End User allows a user without user access to Confirmit, to get access to 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.

24.1 Login and View Report

The end users are provided with a link to a login page where the reports especially assigned to him are located. See picture below.

The link is found under "End users" -> "Lists" in the menu and under the title URL in the window for "End user lists".

Please Log In

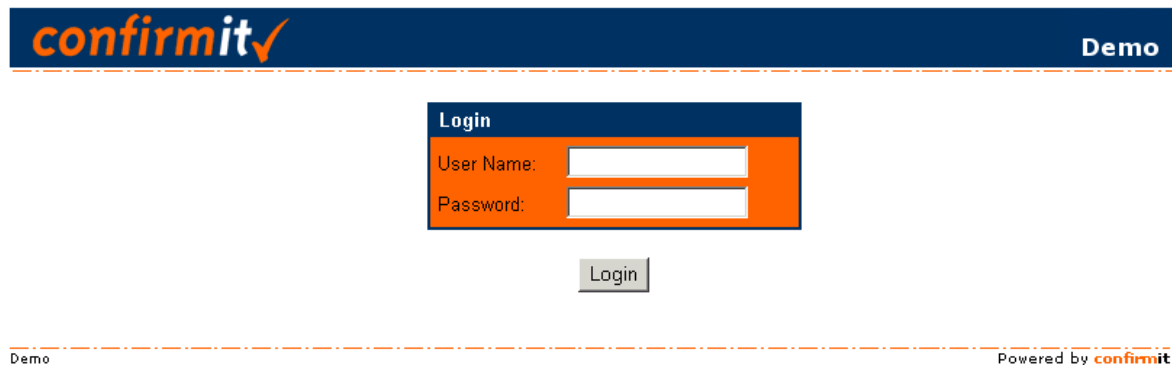


Figure 651: Login Page

The Login fields

Field	Description
User Name	Enter the user name
Password	Enter the password

Table 78: Login Fields

To log in the user enters his user name and password, which has been given to him earlier, and presses "Enter" or the "Login" button. Once the user has been logged in, the "Report Overview" window appears. In this window all projects where the user has access to reports, are listed in the left frame. If the user clicks with the left mouse button on one of the projects in the list, all reports the user has access to in this project are listed in the right hand frame. The reports are displayed in the order as they appear in Online Reporting tree. See picture below.

Report Overview



Figure 652: Report Overview

Fields in the Overview window

Field	Description
Projects	List of projects of which the user has access to reports
Reports	List (links) of reports to which the user has access

Table 79: Fields in the Overview Window

Links in the Overview window

Link	Description
User settings	Opens the page with the user settings
Change password	Opens the page for changing password

Table 80: Links in the Overview Window

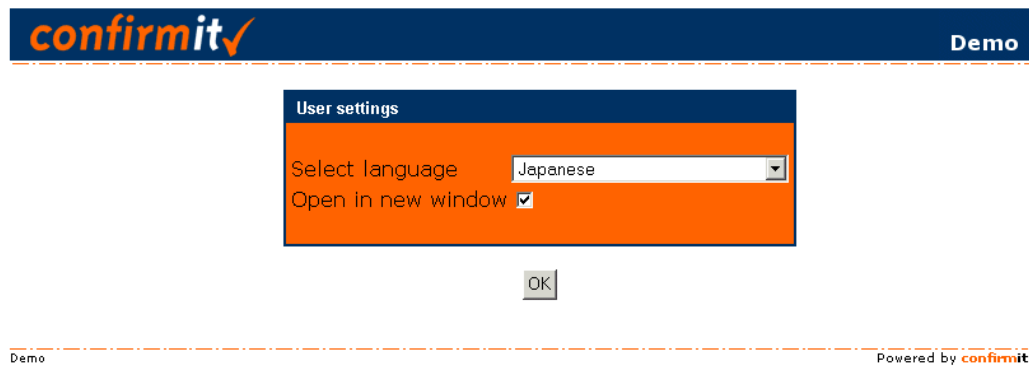
To view a report the user simply must click on the desired report link. The report is opened in a new window.

24.2 User Settings and Change Password

In the “Report Overview” window below, there are two links, one for user settings and one for changing password. The “User settings” link leads to a page where the user may change the language he or she wants to view the report in. All languages that are possible to use in Confirmit will always be listed in this dropdown box. If a user selects a language that the selected project and report is not created in, the default language for the project will be used.

If the check box “Open in new window” is checked the report will open in a new window/browser instead of in the browser that is currently open. The “OK” button leads the user back to the “Report Overview” window. See picture below.

User settings



confirmit Demo

User settings

Select language Japanese

Open in new window ☒

OK

Demo Powered by confirmit

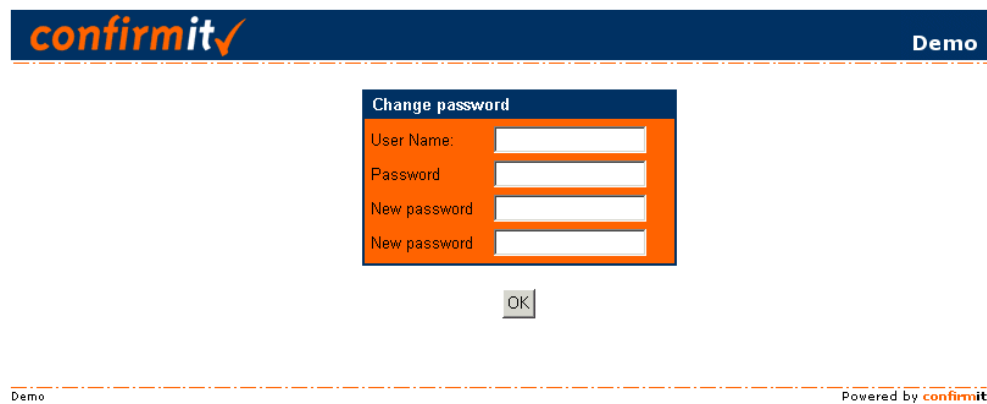
Figure 653: User Settings

Field / check box	Description
Select language	Select the language the reports are to be viewed in
Open in new window	Selected reports are opened in a new window if checked

Table 81: Fields in User Settings Window

The “Change password” link leads to a page where the user may change his or her password. See picture below.

Change password



confirmit Demo

Change password

User Name:

Password

New password

New password

OK

Demo Powered by confirmit

Figure 654: Change Password

Field	Description
User name	Enter user name
Password	Enter old password
New password	Enter new password
New password (2 nd)	Repeat the new password

Table 82: Fields in the Change Password Window

The new password must be written twice. The “OK” button leads the user back to the “Report Overview” window.

25 Survey Data

Under Survey Data you will find functionality for deleting, editing, exporting and importing survey data, and coding of open text responses. See chapter 17 Online Coding Tool for more information about coding of opentext responses.

25.1 Clear Data

The Clear Data menu command allows 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.

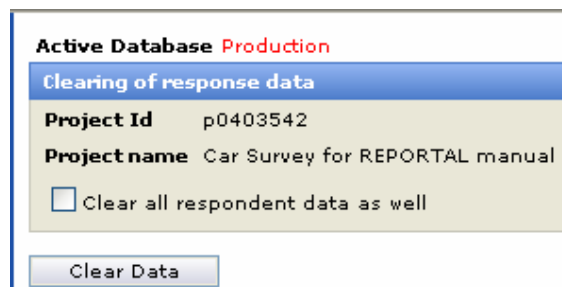


Figure 655: Clear Response Data

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.

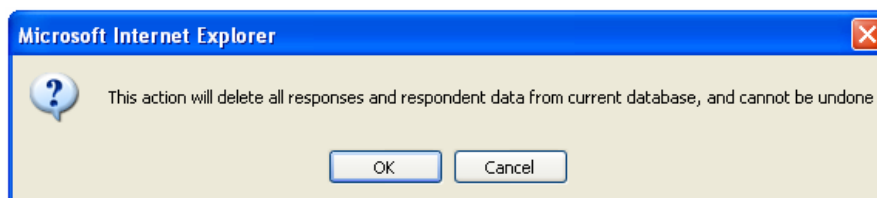


Figure 656: Confirm deletion

4. Click **OK** to continue and delete the data, **Cancel** to abort the operation.

25.2 Edit Survey Data

Edit Survey Data gives you the ability to edit and delete survey data, i.e. directly modifying or removing the responses given by your respondents. **This functionality should be used very carefully, as you are operating directly on the survey database and changes can not be undone.**

The editor has three frames. The upper right frame is used to search for respondents. The left frame with the questionnaire is used to update all respondents that resulted from the search, and the lower right frame is used to update answers for one respondent.

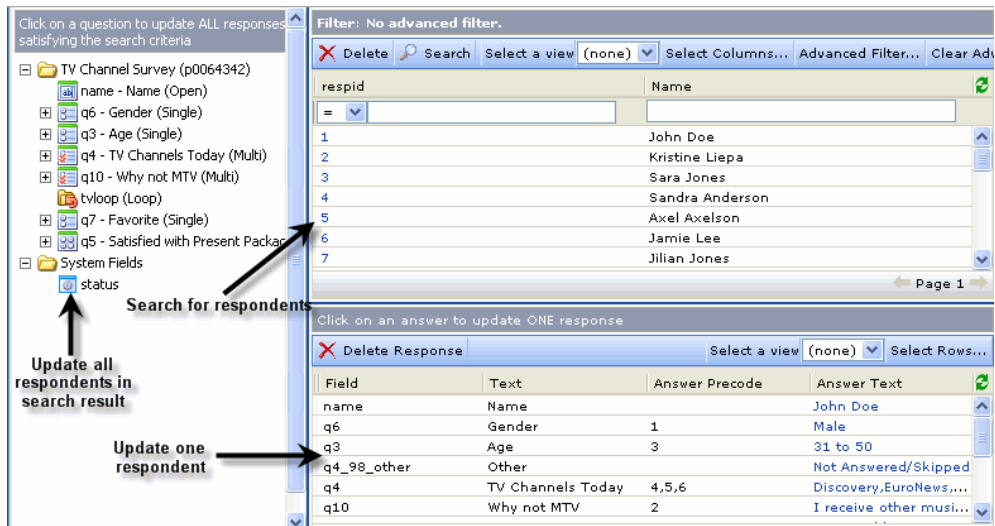


Figure 657: Edit Survey Data

25.2.1 Searching for Respondents

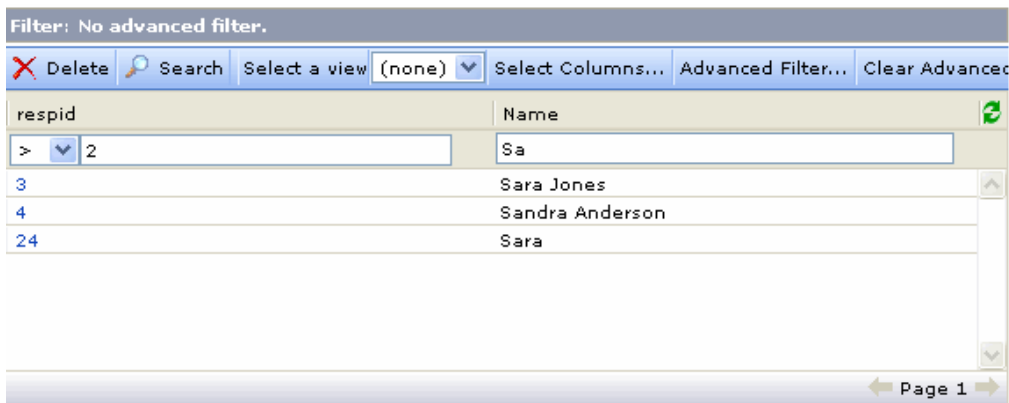


Figure 658: Search frame

There are two ways of searching in the search frame. The easiest is to search by text or code in 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 * as wildcard anywhere in the text searches. The example in the figure above is a search for all respondents with respid less than 10 AND with name starting on the character m.

You may add or remove columns in the search view by clicking the "Select Columns..." button. The question types available as columns in the search view are open text and single questions as well as the system variables status, interview_start and interview_end.

Select Columns

Select from the available items below

confirmit

Close

Select action on views

Update default

Find

Find what

Find

☐ Match case
 ☐ Match whole words only

Available items

☐ q10_2 (Why not MTV)
 ☐ q10_2 (Why not MTV_I receive
 ☐ q10_3 (Why not MTV)
 ☐ q10_3 (Why not MTV_Other)
 ☐ q7 (Favorite)

>>

<<

Selected items

☐ Form Name
 ☐ name (Name)
 ☐ q3 (Age)
 ☐ q6 (Gender)

OK

Cancel

Figure 659: Select columns

In addition to searching in these columns, you can define search by clicking Advanced Filter. Then the advanced filter designer is opened. Here you can set up more advanced expressions involving any variables from the survey. The functionality of the advanced filter designer is described in chapter 19 Advanced Filter Designer.

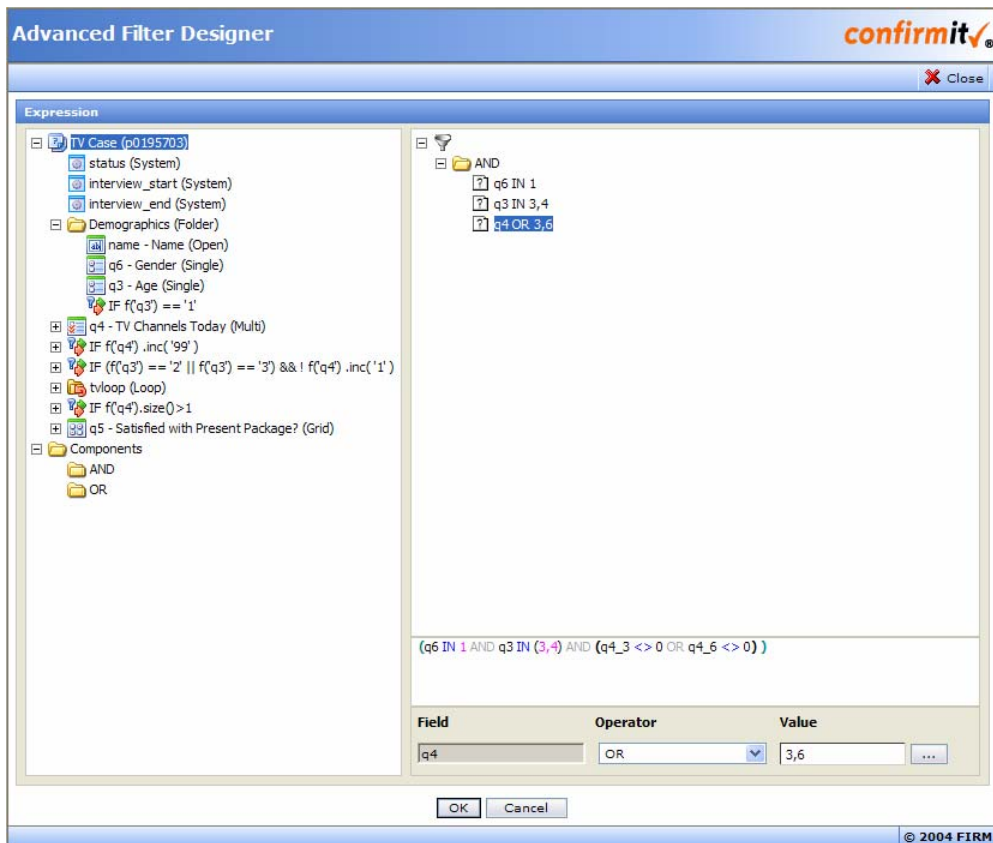


Figure 660: Advanced Filter Designer

You can remove the filter by clicking **Clear Advanced Filter**.

Delete all the respondents matching the current search or filter by clicking the **Delete** button.

Note: Make absolutely sure that this is the correct set of respondents before doing this, as this action can not be undone.

This will not remove the respondents from the respondent list, but will remove all their responses and giving them "Not answered" status.

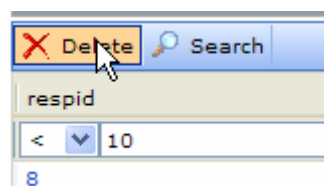


Figure 661: Delete all survey data for the respondents matching current search criteria

Sometimes you may want to have different views, depending on what 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. When in Selected Columns window, you can save a column selection as a View by selecting "Save As New" in the Select action on views dropdown.

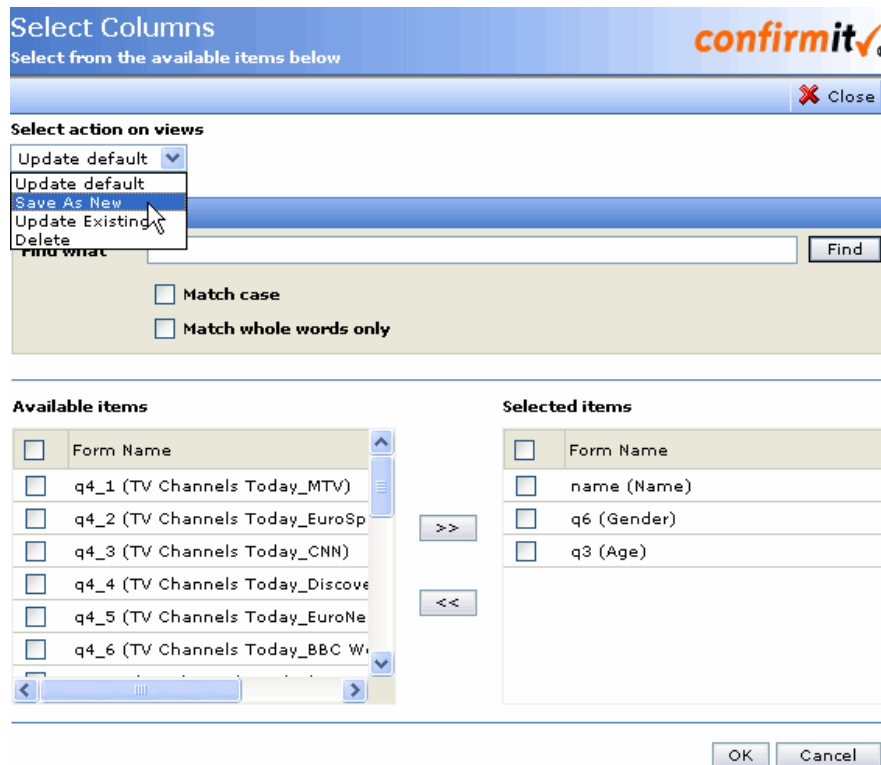


Figure 662: Save as new View

Once you select the Save As New item, a text field will appear next to the dropdown. In this text field you have to enter the name that you want to give the current view.

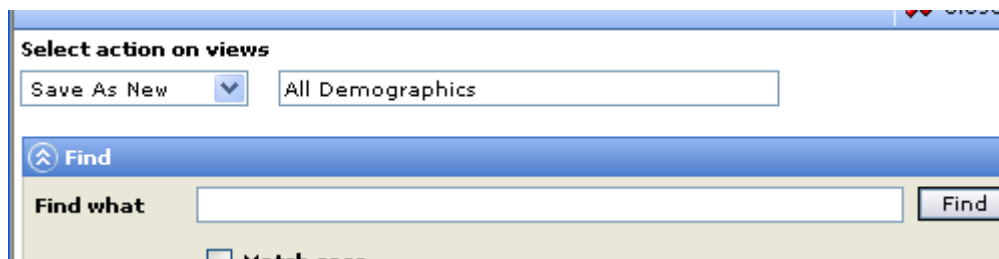


Figure 663: Name the View

The views you create can later be updated and deleted, if 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" dropdown in the main window. When you select a view from the dropdown, the columns specified in that view will be displayed.

respid	Name	Age
1	John Doe	3
2	Kristine Liepa	3
3	Sara Jones	3
4	Sandra Anderson	3
5	Axel Axelson	4
6	Jamie Lee	4
7	Jilian Jones	4

Figure 664: Select a View Dropdown

25.2.2 Update Answers for All Respondents in Search Result

- TV Case (p0195703)
 - name - Name (Open)
 - q6 - Gender (Single)
 - q3 - Age (Single)
 - q4 - TV Channels Today (Multi)
 - q10 - Why not MTV (Multi)
 - tvloop (Loop)
 - q7 - Favorite (Single)
 - q5 - Satisfied with Present Package? (Grid)
- System Fields
 - status

Figure 665: Update all responses in search result

In the left frame you can click on questions in the questionnaire to remove or set new answers for all respondents in the search result. Make sure you have the correct search result before updating responses.

Depending on the question type you will get different functionality in the windows that pop up when you click the questions.

For open text questions (and open text questions with the numeric property) you get a window where you can either set a new value, or set the question to "Not answered" (empty/null) for all respondents matching the search criteria.

Update responses
Add a new value in the input field - Click 'OK' to update the response(s)

New Value

Not answered ☐

OK Cancel

Figure 666: Open text question

For single questions, you get a list with precodes and answer texts (in current language). You can either select one of the items or set the question to "Not answered "(empty/null).

Update responses confirmit®

Select a new answer - Click 'OK' to update the response(s)

Search

Answer Precode Answer Text

1 Male

2 Female

Page 1

All a b c d e f g h i j k l m n o p q r s t u v w x y z

Not answered ☐

OK Cancel

Figure 667: Single question

For ordinary multi questions, you get a list with precodes and answer texts in current language, where you can choose which items to update, and then a dropdown at the bottom where you select what to set the items to: "Selected" (1), "Not selected" (0) or "Not answered" (null).

Update responses confirmit®

Select answer(s) to update - Choose a new value from the dropdown - Click 'OK' to update the response(s)

Search options

Answer Precode

Answer Text

Results per page 100 Search

Find

Find what

☐ Match case

☐ Match whole words only

Available items

Answer Precode	Answer Text
☐ 3	CNN
☐ 4	Discovery
☐ 5	EuroNews
☐ 6	BBC World
☐ 98	Other
☐ 99	I do not watch TV
☐ 1	MTV
☐ 2	EuroSport

Selected items

Answer Precode	Answer Text

>>

<<

Set to Selected OK Cancel

Figure 668: Ordinary multi question

For a multi question with the opentext, numeric or ranking property, the dropdown will be replaced with a text box and the not answered check box. First you select which items to update in the answer list, and then you either set a value in the text box or select "Not answered".

Figure 669: Multi question with opentext, numeric or ranking property

For a grid question, you have to expand the grid and work on each of its elements as if they were single questions:



Figure 670: Expanding grid question

Similarly, for "other specify" elements on any question, you must expand it to set the other specify item. Setting an "other specify"-item is just like setting an open text question.

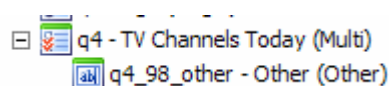


Figure 671: Expanding "other specify"-element

25.2.3 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 will then be listed in the lower right frame. The fields will come in the same order as in the questionnaire. There will be 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) as well as 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 mutlis 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 answerlist. Grid questions are also split with one row for each item in the answerlist.

The screenshot shows the 'Data editor' interface. The top section is a filter bar with 'Filter: No advanced filter.' and buttons for 'Delete', 'Search', 'Select a view' (set to 'All Demographics'), 'Select Columns...', 'Advanced Filter...', and 'Clear Advanced Filter'. Below this is a table of respondents with columns: respid, Name, Gender, and Age. The table lists 8 respondents, with the first row being John Doe (respid 1, Gender 1, Age 3). The bottom of this section shows 'Page 1' navigation.

The bottom section is titled 'Click on an answer to update ONE response'. It has a 'Delete Response' button and 'Select a view' (set to '(none)') and 'Select Rows...' buttons. Below this is a table of fields with columns: Field, Text, Answer Precode, and Answer Text. The table lists 10 fields, with the first row being 'name' (Text: Name, Answer Precode: John Doe, Answer Text: John Doe). The bottom of this section shows 'Page 1' navigation.

Figure 672: Data editor

To update a value, click on the link in the answer text column. You will get different pop-up windows depending on question type. 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 which rows to display. You can also define Views by choosing which data fields to display, exactly in the same manner as in the upper frame where columns were selected to specify predefined views.

For open text questions, open text questions with the numeric property and "other specify" fields, you get a window with a text box with the current value. You may either change this or select the "Not answered" check box,

The screenshot shows the 'Update responses' pop-up window. The title bar says 'Update responses' and the Confirmity logo is in the top right. Below the title bar is a blue bar with the text 'Add a new value in the input field - Click 'OK' to update the response(s)'. To the right of this bar is a 'Close' button with a red X icon. Below the blue bar is a text input field with the value 'Elwood Blues'. Below the input field is a 'Not answered' checkbox, which is currently unchecked. At the bottom right are 'OK' and 'Cancel' buttons.

Figure 673: Open text

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.

Update responses confirmit®

Select a new answer - Click 'OK' to update the response(s)

Close

Search

Answer Precode	Answer Text
1	Male
2	Female

Page 1

All a b c d e f g h i j k l m n o p q r s t u v w x y z

Not answered ☐

OK Cancel

Figure 674: Single question

For ordinary multi questions, the window will open with the currently selected items in the "selected items" list. You can add or remove items from that list, and then select how to update the elements selected in the dropdown at the bottom of the page: Either setting them to "Selected" (1), "Not selected" (0) or "Not answered" (null).

Update responses confirmit®

Select answer(s) to update - Choose a new value from the dropdown - Click 'OK' to update the response(s)

Close

Search options

Answer Precode

Answer Text

Results per page 100 Search

Find

Find what

☐ Match case

☐ Match whole words only

Available items		Selected items	
Answer Precode	Answer Text	Answer Precode	Answer Text
☐ 98	Other	☐ 1	MTV
☐ 99	I do not watch TV	☐ 2	EuroSport
		☐ 3	CNN
		☐ 4	Discovery
		☐ 5	EuroNews
		☐ 6	BBC World

Set to Selected OK Cancel

Figure 675: Ordinary multi question

For multi questions with the numeric, ranking or opentext property you get a window with the entire answerlist when clicking any of the elements of the multi. Here you can select some of the items in the answerlist, and then set a value in the text box at the bottom or select "Not answered" to update the selected items.

Update responses

Select answer(s) to update - Add a new value in the input field - Click 'OK' to update the response(s)

confirmit

Close

Search options

Answer Precode

Answer Text

Results per page 100 Search

Find

Find what

Find

☐ Match case
 ☐ Match whole words only

Available items

	Answer Precode	Answer Text
☐	1	MTV
☐	2	EuroSport
☐	3	CNN
☐	4	Discovery
☐	5	EuroNews
☐	6	BBC World
☐	98	Other
☐	99	I do not watch TV

>>

<<

Selected items

	Answer Precode	Answer Text

Not answered ☐

New Value

OK

Cancel

Figure 676: Multi question

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.

The files will use the variable names that are used in the database, based on the question IDs. Table 83 explains the variable names and contents of the files, except for the "Excel file – labels" which exports answer texts instead of precodes (see section 25.3.2.1.1 Export format).

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.

Table 83: Variable names

All exports will be sent as compressed files with .zip extension ("zipped") and may be extracted by using standard software like 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

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 get the required subset.

The template editor allows you to specify templates both for the production and the test database. The database is created when launching a survey. Since this may have been done at different times for production and test databases, and there may have been changes in the questionnaire in between, the test and production databases may contain different fields. So before editing templates you have to select which database you want to use and then click "Show".

Figure 677: Field chooser template editor

From the template list you may choose to *Edit*, *Copy* or *Delete* an existing template (select template from the list and click the desired action), or make a new template by clicking *New*.

Field	Description
Template name	The name of the template.
Template type	For exports from projects with loops, there are two types of template definitions available, with different degrees of flexibility. See section 25.3.1.2 Data Export Templates for Projects with Loops.
Verbatim key field	Open Text questions that have no field width specified (see section 7.2.3.10 Question Properties) 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 (see section 7.2.3.10 Question Properties). These files will by default have respid as identification of the respondents, but if the data files include another id you would rather use (for example a member id) this may be set in 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. See section 25.3.1.2 Data Export Templates for Projects with Loops.
Loop IDs	When a loop is selected in the loop ID dropdown, the loop ids (the variables that hold the iteration code) are available here. See 25.3.1.2 Data Export Templates for Projects with Loops.
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. <i>responseid</i> Respondent identification assigned when the respondent starts answering the survey. <i>respid</i> Respondent identification assigned when the respondent is added to the respondent list. <i>status</i> Status of the interview. <i>Complete</i> if the respondent has reached the end of the questionnaire (or a STOP node where status is set to complete), <i>screened</i> if the respondent has reached a stop node where status is set to screened, <i>quota_full</i> 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. <i>interview_start</i> 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. <i>interview_end</i> 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 (see chapter 21 Recoding Data)
Export fields	These are the fields that will be included in the exports done with this template.

Table 84: Template details

You move variables from *std fields*, *user defined fields* and *recoded fields* to *export fields* by selecting a variable and clicking > (or < to move it back) or by clicking >> to move all from the field. You may change the order of the variables by adjusting the list with ^ and v. Click on **Save** when you are finished making changes to the template.

25.3.1.1 Import of Export Templates

It is also possible to 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.
2. In the right frame, search for the project from which you want to import the export template.

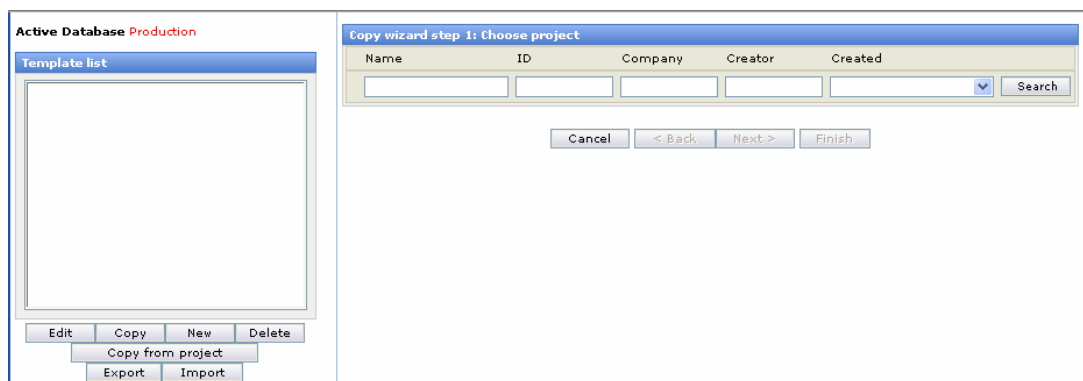


Figure 678: Importing a template into a project

- Find and select the required project, then click **Next**.

All export templates that are available in the selected project will be displayed.

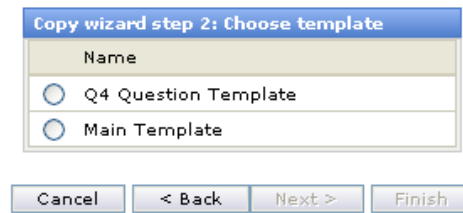


Figure 679: Choose template

- 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).

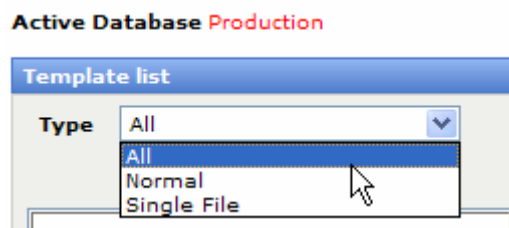


Figure 680: Filter on Template Type

When creating a new template in a project with loops, you first have to choose between the two types:

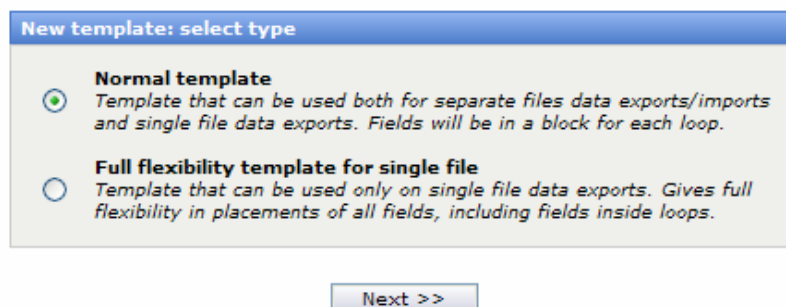


Figure 681: Choose Template Type

A "separate files" data export means that there will be a separate file for each loop, and that there in the loop files 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. Loop field will then have to come concatenated 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.

In our examples we will use this project:

This is the example project used in the screenshots:

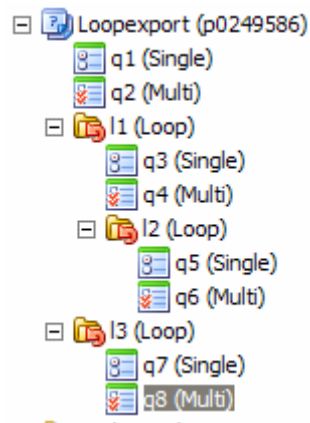


Figure 682: Project with loops

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

Let us first look at the "normal" template editor.

For Single File exports a loop level must always be connected to the level above.

Template details

Template name
Test

Verbatim key field
 (default: respid)

Loop ID
Top level

Std fields
responseid
respid
status
interview_start
interview_end

Loop IDs

User defined fields
q1
q2_1
q2_2
q2_3
q2_4
q2_5
l1
l3

Recoded fields

Template type
Normal

Field length - responseid/respid
 (default: 11)

Filter

Export/import fields

Figure 683: Data export template editor for a project with loops

Field	Description
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 dropdown, the loop ids (the variables that hold the iteration code) are available here.

Table 85: Loop fields in data export template editor

You include a loop and its contents by moving it from "User defined fields" to Export/import fields. The grey shading indicates that it is a placeholder for all the variables in that loop.

For Single File exports a loop level must always be connected to the level above.

Template details

Template name

Verbatim key field
 (default: respid)

Loop ID

Std fields

Loop IDs

User defined fields

Recoded fields

Template type
Normal

Field length - responseid/respid
 (default: 11)

Filter

Export/import fields

responseid
respid
status
interview_start
interview_end
q1
q2_1
l1
q2_2
q2_3
q2_4
q2_5
l3

Figure 684: 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 dropdown, so that only variables that belong to the loop (or at top level) are shown.

Before switching between different loops with the loop ID dropdown, you should remember to save the changes you have done.

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 grey 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” dropdown, its loop ID can be selected and included in the export/import fields. These ids will not have the grey 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 dropdown, 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.

Loop IDs

l1

> >>

Figure 685: Loop IDs in loop l1

For Single File exports a loop level must always be connected to the level above.

Template details

Template name
Test

Template type
Normal

Verbatim key field
(default: respid)

Field length - responseid/respid
(default: 11)

Loop ID
l1

Filter

Std fields

Loop IDs

User defined fields

Recorded fields

Export/import fields

responseid
respid
l1
q3
q4_1
q4_2
q4_3
q4_4
q4_5
l2

Save

Figure 686: 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:

Loop IDs

l1
l2

> >>

Figure 687: Loop IDs in l2

In **separate file loop export** loop IDs as well as std fields respid and responseid 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, since the precodes are included in the variable names generated in the single file export.

Let us look at a single file export with the same example project:

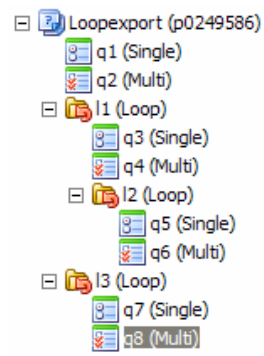


Figure 688: Project with loops

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 like this:

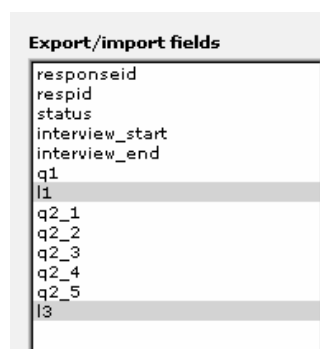


Figure 689: Top level

then the single file will first have the variables

```
responseid
respid
status
interview_start
interview_end
q1
```

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 690: 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_1
q4_1_1
q4_2_1
```

but since 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 like this:

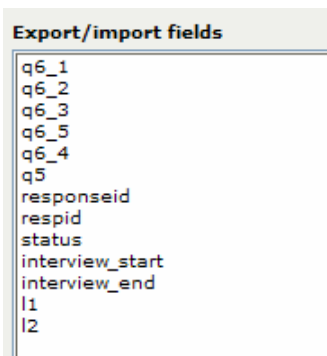


Figure 691: Loop l2

So, now – first the l2 variables for first iteration of l1, first iteration of l2:

```
q6_1_1_1
q6_2_1_1
q6_3_1_1
q6_5_1_1
q6_4_1_1
q5_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_2
q6_2_1_2
q6_3_1_2
q6_5_1_2
q6_4_1_2
q5_1_2
```

and so on up to the last (5th) iteration of l2, first iteration of l1:

```

q6_1_1_5
q6_2_1_5
q6_3_1_5
q6_5_1_5
q6_4_1_5
q5_1_5

```

Then we are finished with the I2 block for the first iteration of I1 and move back to the last variables for the first iteration of I1:

```

q4_4_1
q4_3_1
q4_5_1

```

After this we would run through the same for all the 4 remaining iterations of I1 – and for each of these run through five iterations of I2, before we get back to the top level again and do the next top level variables:

```

q2_1
q2_2
q2_3
q2_4
q2_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:

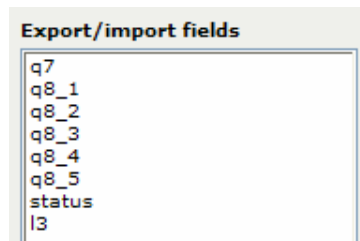


Figure 692: Loop I3

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_1
q8_1_1
q8_2_1
q8_3_1
q8_4_1
q8_5_1
q7_2
q8_1_2
q8_2_2
q8_3_2
q8_4_2
q8_5_2

```

...and so on until

```

q7_5
q8_1_5
q8_2_5
q8_3_5
q8_4_5
q8_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, but gives full flexibility in placement of all the fields, including loop fields.

Template details

Template name
Fullflex

Template type
Single File

Filter
[Dropdown]

Field length - responseid/respid
[Text Box] (default: 11)

Std fields
responseid
respid
status
interview_start
interview_end

Export fields
[Empty Box]

User defined fields
q1
q2_1
q2_2
q2_3
q2_4
q2_5
q3_1
q4_1_1
q4_2_1
q4_3_1
q4_4_1
q4_5_1
q5_1_1
q6_1_1_1
q6_2_1_1
q6_3_1_1
q6_4_1_1
q6_5_1_1
q5_1_2
q6_1_1_2
q6_2_1_2
q6_3_1_2
q6_4_1_2
q6_5_1_2
q5_1_3

Sort questionnaire [Dropdown] asc [Dropdown]

Save

Figure 693: 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 I2 which is inside loop I1, the list of user defined fields will include all the 25 fields for this variable.

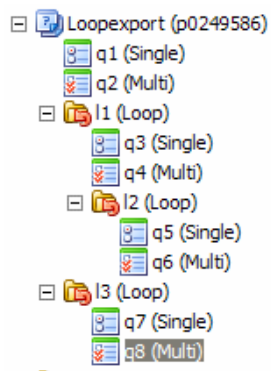


Figure 694: Project with loops

q5_1_1 (first iteration of I1, first iteration of I2)
 q5_1_2 (first iteration of I1, second iteration of I2)
 q5_1_3 (first iteration of I1, third iteration of I2)
 q5_1_4 (first iteration of I1, fourth iteration of I2)
 q5_1_5 (first iteration of I1, fifth iteration of I2)
 q5_2_1 (second iteration of I1, first iteration of I2)
 q5_2_2 (second iteration of I1, second iteration of I2)

... 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.

Since this will give a very long list of questions, you have a few sorting options at the bottom of the page:

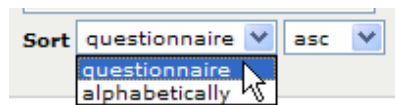


Figure 695: Sorting fields

You can sort ascending or descending alphabetically or by the order of the questions in the questionnaire routing.

25.3.2 Exports

The first step is to choose the export type.



Figure 696: Choosing Export Mechanism

Export Mechanism	Description
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.
MS Word Export	Export the questionnaire (question texts and answer lists) to MS Word®.
Triple-s Export	Exports response data in triple-s format. See section 25.3.5 Triple-S Export.

Table 86: Export Mechanisms

25.3.2.1 Data Export

The screenshot shows a 'Data Export' configuration window with the following fields and values:

- Export format:** Excel file
- Export template:** All fields
- Data export:** Complete responses
- Loops:** Single file
- Loop iteration order:** As in questionnaire
- Partial exports:** All data
- Language:** English
- Recipient email:** usermanual@firmglobal.com
- Comment:** (empty text area)
- Start time:** ASAP
- Override email options:** ☒
- Mail encoding:** Western European (ISO)
- Send as HTML:** ☐
- Sender:** projectmanager@firmglobal.com
- Subject:** Excel data from our project
- Body:** Dear John Doe.
Attached you will find the export we agreed on.
- Override file name:** ☒
- File name:** p0249586_usermanual_^TASKID^.xls

An 'OK' button is located at the bottom center of the window.

Figure 697: Data export

25.3.2.1.1 Export format

Export Format	Description
Excel file	MS Excel® file in the Office version specified in section 4.14 User Settings. 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 Table 83.
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 ASCII text file. All answers will be inside quotes (").

comma separated, quoted	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 (see section 7.2.3.10 Question Properties), 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" (see section 25.3.2.1.4 Open ends). 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.) <i>Form ID</i> The Question (form) ID <i>Var ID</i> The variable name. Form ID and Var ID will be equal for Single and 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. <i>Start Col</i> The start position of this variable in the export file, counting characters from left to right. <i>End Col</i> The end position of this variable in the export file, counting characters from left to right. <i>Punch</i> Will list the possible punches (precodes) for these answers corresponding to the texts in the Answer Text field. <i>Question Text</i> The text of the question. <i>Answer Text</i> The text of the answer. (Corresponding to Punch). <i>Data Type</i> Question type (or system generated type). <i>Level ID</i> 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 (see section 7.2.3.10 Question Properties). 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 (see section 25.3.1 Template Editor). For open-ended questions inside loops, the loop id(s) will be included as well.

Table 87: Export formats

25.3.2.1.2 Export template

Choose between "all fields" or a user-defined template for a subset of the fields. (See section 25.3.1 Template Editor.)

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. But they can be included if you choose to specify a field width with any of the following values: 8, 16, 32, 64, 128 or 255 characters. Answers longer than the value specified here will be truncated.

This choice is only available for fixed-width text file, Excel definition file for fixed-width text file and SPSS export.

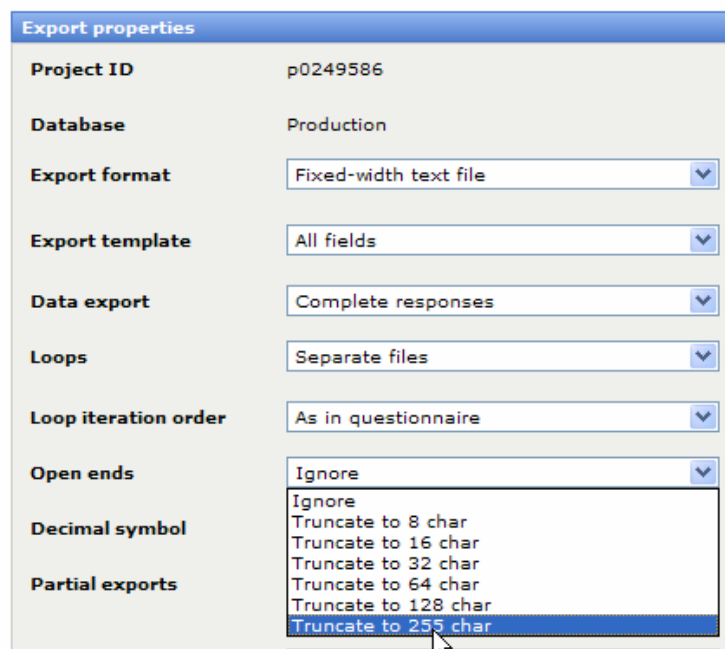


Figure 698: Truncating Open Ends

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

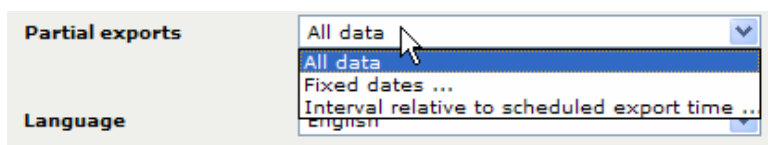


Figure 699: Export properties

Relative partial export allow 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.

In the Partial Exports drop-down are the following options:

- **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 the Interview status is "Complete", then the `interview_end` property is used to calculate which responses are to be included in the export. For all other statuses, the `interview_start` property is used.

25.3.2.1.6.1 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." 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 response remains unique, so it will be easy to find duplicates in exports done at different dates.

25.3.2.1.6.2 Fixed dates

It is possible to export a partial data set for just a specific period of time, instead of the default of exporting the entire dataset. Fixed dates export can be done for export of response data files to all formats (ASCII, Excel and SPSS), but not for the Excel definition file. The data set is limited by start date and end date. Start date will limit the export to responses that started on or after the specified date. 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".

25.3.2.1.6.3 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.

An 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)

In order to get data export for the abovementioned interval, the user should 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 which language Question titles and labels should appear in from the project's active languages. (Relevant only for Excel definition file and SPSS export).

25.3.2.1.9 Character encoding

To support export of open text answers in surveys using Unicode (for example Chinese) it is possible to choose the Character Encoding of the Export files. You can 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

Use this field to specify details about your export to make it easier identifying the task in task management.

25.3.2.1.12 Start time

Specifies when the export task is to be put in the task list. Either immediately ("ASAP") or "Schedule for later execution", where you will be brought to Task Settings and may specify when the task is to execute and set it up as a recurring task.

25.3.2.1.13 Override email options

When chosen, gives you gives you possibility 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

Only available/displayed to users with Data Transfer Encryption (see section 1.4.3 Data Transfer Encryption and FTP). The user may choose to either 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 Conformat that the file is available for download. The user will then have to log on to the FTP server, download the file, and then decrypt it with the private encryption key.

25.3.2.1.15 Encrypt file

Only available/dispalyed to users with Data Transfer Encryption (see section 1.4.3 Data Transfer Encryption and FTP). 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>

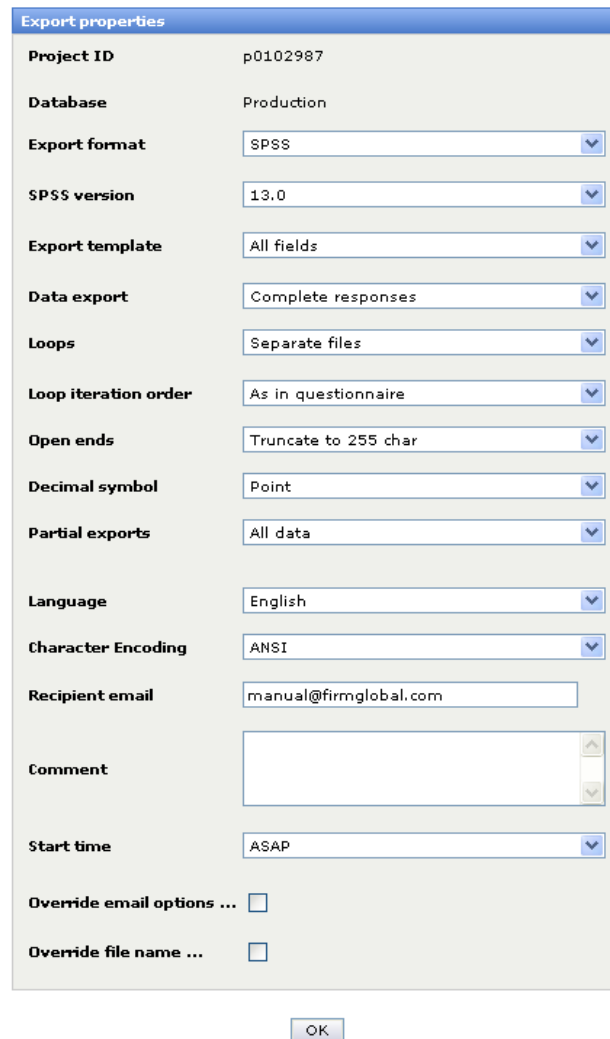
For partial exports, you can include the start and end timestamps of the data export:
<projectid>_<userid>_<start>_<end>_<taskid>.<extension>

The new functionality "Override file name" gives users the possibility to override the systemgenerated name: Tick this check-box, and a textbox "File name" will appear. Here you can edit the system generated name. There will be two textboxes 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 dataexport task in the file name. If not included, the file will be exported with the same name every time the task is run if it is recurring.

25.3.2.1.17 SPSS Export

Choose SPSS from the Data Export menu to order the SPSS export.



The image shows the 'Export properties' dialog box in SPSS. It contains various settings for exporting data. The 'Project ID' is 'p0102987'. The 'Database' is 'Production'. The 'Export format' is 'SPSS'. The 'SPSS version' is '13.0'. The 'Export template' is 'All fields'. The 'Data export' is 'Complete responses'. The 'Loops' are 'Separate files'. The 'Loop iteration order' is 'As in questionnaire'. The 'Open ends' are 'Truncate to 255 char'. The 'Decimal symbol' is 'Point'. The 'Partial exports' are 'All data'. The 'Language' is 'English'. The 'Character Encoding' is 'ANSI'. The 'Recipient email' is 'manual@firmglobal.com'. There is a 'Comment' text box. The 'Start time' is 'ASAP'. There are checkboxes for 'Override email options ...' and 'Override file name ...'. An 'OK' button is at the bottom.

Property	Value
Project ID	p0102987
Database	Production
Export format	SPSS
SPSS version	13.0
Export template	All fields
Data export	Complete responses
Loops	Separate files
Loop iteration order	As in questionnaire
Open ends	Truncate to 255 char
Decimal symbol	Point
Partial exports	All data
Language	English
Character Encoding	ANSI
Recipient email	manual@firmglobal.com
Comment	
Start time	ASAP
Override email options ...	☐
Override file name ...	☐

Figure 700: SPSS Export

The SPSS export will come as a fixed-width ASCII file and an SPSS syntax file (with extension .sps), not directly as a .sav file.

The .sav file can easily be made by extracting the zipped, fixed-width ASCII file and saving it in the in **C:\temp** on your computer, then opening the syntax file (.sps) in SPSS and running the script either by choosing **Run > All** or by selecting all syntax and clicking the  button. (see Figure 701: Run SPSS script).

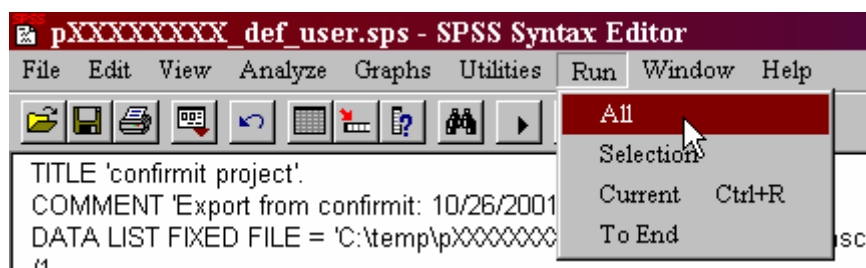


Figure 701: Run SPSS script

25.3.2.1.17.1 Variable names

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).

The maximum length of the variable names in SPSS is 8 characters. This means that if some variable names given in Confirmit are larger than that, they have to be truncated. All the variable names (for user fields) are given a consecutive number beginning with number 1 for the first field. The truncated variable names will then be on 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.

25.3.2.1.17.2 Variable labels

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. The maximum length of the variable labels in SPSS is 255 characters. Variable labels longer than that are truncated so that only the 255 first characters are shown in SPSS.

25.3.2.1.17.3 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.

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.

25.3.2.1.17.4 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 255 characters for values. 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 with any of the following values: 8, 16, 32, 64, 128 or 255 characters. 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.

25.3.2.1.17.5 Value labels

The answer texts from Confirmit are used as value labels in the SPSS syntax file.

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 database is 32 characters. 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.

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.

25.3.2.1.17.6 Record length

The default record length allowed in SPSS is 8192. For long questionnaires with many variables (and especially when including truncated open ends), the number of characters per row in the fixed width file may exceed this limit. You will then get a warning when running the syntax file:

A data element conversion on the indicated command will go past the end of the record. Check the data list and the data file. The result has been *set to the system-missing value*. The values that are outside this limit will then not be included in the .sav file, they will be set to "System Missing".

To solve this you may choose a smaller value on "Truncate Open Ends" or set smaller field widths on grid and single questions in the questionnaire (if eg. the scale on a grid just uses precodes 1 to 5, you may use a field width of 1 instead of the default of 32).

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.

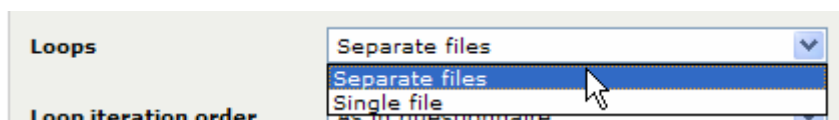


Figure 702: Export options for loops

25.3.2.1.18.1 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.

25.3.2.1.18.2 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.

In the Data Export window you may select "Single file" in the "Loops" drop down box to perform a single file export.

As these single file export files tend to get large, an estimate of the file size needs to be calculated before such an export task is started. This estimate is presented to the user.

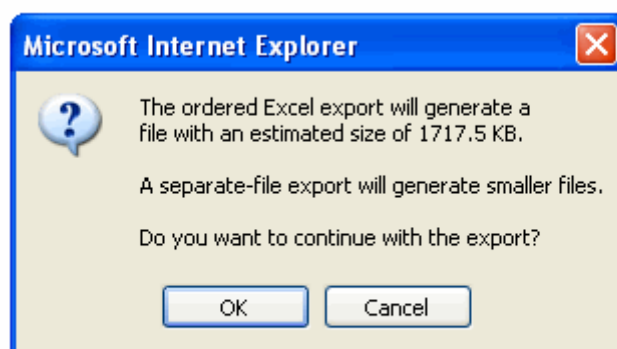


Figure 703: File Size Estimate

Based on the file size estimate, the user may either abort an export task that is large or he may 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 easily 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.

25.3.2.1.18.2.1 Variable names

The variables names for the loop variables in the single file export will be like this:

- <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.

25.3.2.1.18.3 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.

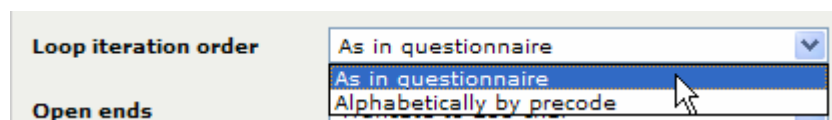


Figure 704: Loop iteration order

It is also possible to get 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. With this setting loop iterations with precodes 1-12 will come in this 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”.

25.3.3 Report Export

For a description see chapter 20 Aggregated Reporting.

25.3.4 MS Word® Export

You can also 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: 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.

25.3.4.1.1 New Version

Note: This version of the MS Word Export functionality is included in Confirmit 11 and requires MS Office 2003. Users with older versions of MS Office will be able to use the old version of the export functionality (see the next section of this manual).

1. Go to the **Designer > Export Survey to MS Word** menu command.

The dialog shown in Figure 705 is displayed.

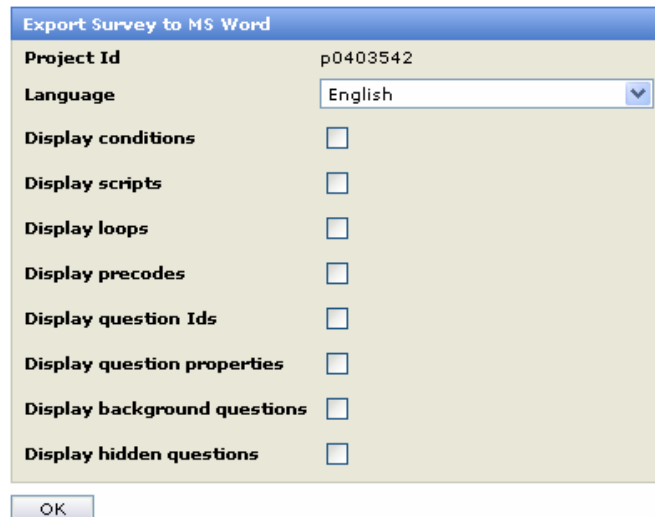


Figure 705: The Export Survey to MS Word dialog

2. Check the boxes for the items you wish to include in the export file.
3. Click **OK**.
Conformit generates the document and presents a File Download question dialog.

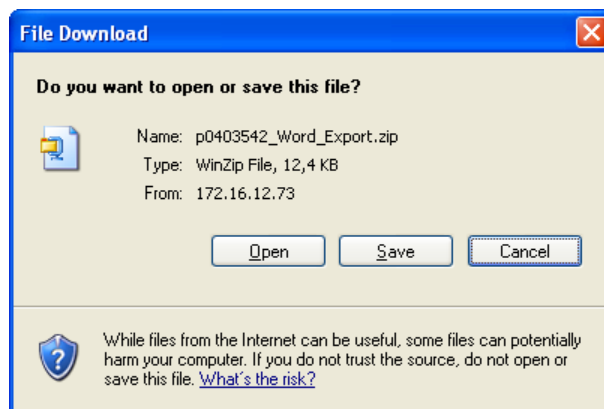


Figure 706: The File Download Question dialog

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.

25.3.4.1.2 Old Version

This version of the MS Word Export functionality is available to users with MS Office versions before Office 2003.

1. Go to the **Designer > Export Survey to MS Word** menu command.
The dialog shown below opens.

The screenshot shows a dialog box titled "Export properties". It has the following fields and values:

- Project ID:** p0249586
- Database:** Production
- Language:** English (selected from a dropdown menu)
- Recipient email:** usermanual@firmglobal.com
- Comment:** An empty text area with a vertical scrollbar.
- Start time:** ASAP (selected from a dropdown menu)
- Override email options:** An unchecked checkbox.

An "OK" button is located at the bottom center of the dialog box.

Figure 707: MS Word Export

2. Type in the appropriate information and click **OK**.

An email with the file attached is sent to the specified address.

The property and data fields are:

- **Database** – the database you want an export from. Either "Production" or "Test". Remember that the export will give you the questionnaire from the last compiled version of the database you choose. Test and Production databases may differ.
- **Language** – the questionnaire will be exported in the language selected here. Choose from active languages.
- **Recipient email address** – the export is sent to this mail address.
- **Batch job comment** – this comment will appear in the comment field of the Task Management lists. Use it to distinguish between tasks.
- **Start time** – specifies when the report shall be put in the task list. Either immediately (ASAP), or "schedule for later execution"
- **Override email options** – when chosen, gives you gives you possibility to override the standard export email options and customize both the subject and the email that will be sent to the export recipient.

25.3.5 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 answerlist 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.org and read about Triple-S XML version 1.1 for more detailed information about the definition and data file formats.

25.3.5.1 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.



Figure 708: Selecting Triple-s Export from the Exports page

2. Select the Triple-s Export option and click **Next >**.

The Export Properties page opens.

Figure 709: 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.
 - **Field Width** – 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.

25.3.6 Ascribe Export

Ascribe™ is an application for coding open text (verbatim) responses, provided by Language Logic (<http://www.languagelogic.info>) and is not part of the Confirmit offering or part of any product of service provided by Confirmit. The Ascribe export will give an XML file with questionnaire and codebook definitions, as well as response data. It gives you a simple way to transfer the data from Confirmit to Ascribe.

The XML file can either be sent by email, or be transferred directly to an Ascribe FTP server.

To use the FTP option, your company's Confirmit account needs to 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.

The Ascribe export is available under "Data Exports" in the "Survey Data" menu.

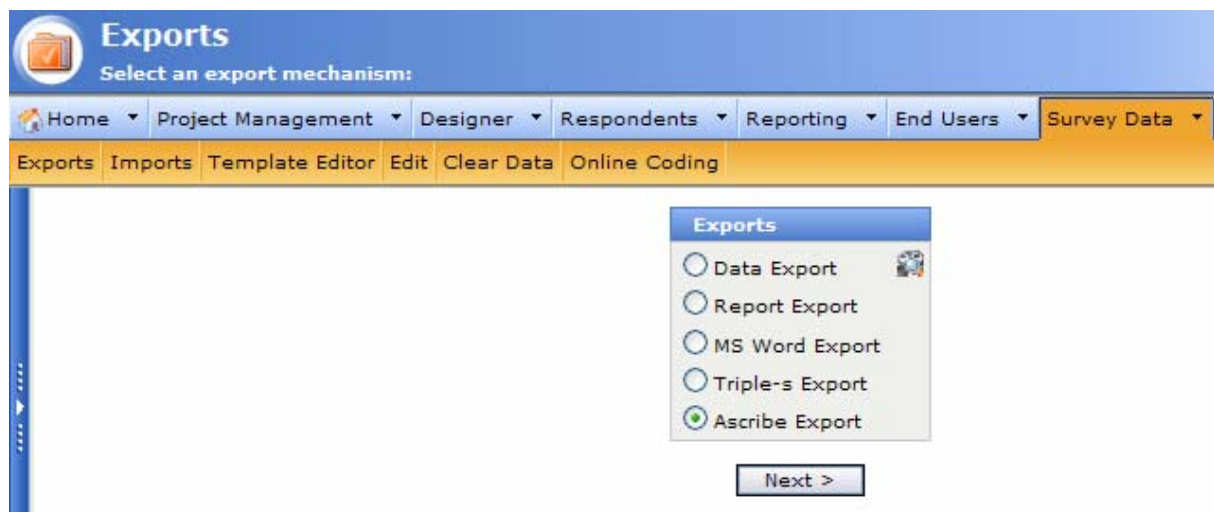


Figure 710: Ascribe Export

25.3.6.1 Settings

Properties	
Project ID	p0659729
Database	Production
Language	English
Question type	All
Response data	Include
Response data filter	Complete responses
File name	p0659729.xml
File transfer	FTP
Ascribe Account ID	FIRM
Comment	
Start time	ASAP

OK

Figure 711: Ascribe export settings

The export will be done on the active database. Switch between test and production with the global switch in the bottom right corner of the Confirmit window.

The questionnaire texts and codebooks in the XML file will be included in the language you select.

You have three options on what questions with codebooks to include in the export through the "Question type" property:

1. The entire questionnaire ("All"),

2. "Only opentext": Include open text questions, other specify options in answer lists and multis with the opentext property.
3. "Only coded opentext": Include 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 figure below.

The screenshot shows a 'Properties (Changes made)' window for a 'Multi Question - (q4)'. It has two tabs: 'General' and 'Advanced WI Features'. The 'Advanced WI Features' tab is active. The settings are as follows:

Property	Value
List rows	2
List columns	2
Field width	
Open text	☐
Numeric	☐
Ranking	☐
Opentext coding	☒
Coding of	q2_98_other
Answer list display order	Randomized

Figure 712: Opentext coding property

Open text questions that are referred as "Coding of" in a multi, like 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.

If you want only to export the questionnaire and codebooks, and not include the response data in the XML file, you can select "Ignore" in the response data dropdown. Response data may be imported to Ascribe later using one of the data export formats. The default is to include response data.

If including response data, you can choose to only export "complete responses" (default), or export all responses in the "Response data filter".

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.

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.

25.3.7 Imports

Response data from other systems or from other Confirmit projects can be imported into a Confirmit survey. This makes it possible to for example use Confirmit Reportal for reporting.

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 have to 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 like 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 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 (the original data in the database will be kept). 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.

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.

Importing is accessible from "Data Transfer->Imports" after selecting a project.

You can choose between two different kinds of data import:

- "Upload files" – Immediately upload response data file(s) from the client machine (your own computer or network)
- "Pick up files from server" – The import file(s) are placed on a designated server area on the Confirmit server and a task is executed to pick up the file(s) from there.

The user must also select a database to upload the file to, either "Production" or "Test".

Figure 713: Data import

25.3.7.1 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 (like the "separate files" loop export, see section 25.3.2.1.18.1 Separate files).

The user should only specify the top-level filename (a txt file) if this is the only file to be uploaded. If loop files are to be uploaded as well, all the files have to 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 have to 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.

25.3.7.2 The Import Files

The import files have to be tab delimited ASCII files.

The first row must have the variable names, and they have to correspond with the variable names in Confirmit. The variable names must be unique, otherwise the import will be aborted. The contents have to correspond with the precodes used in Confirmit for single and grid questions and have to be 0 for not chosen and 1 for chosen for ordinary multi questions. Since tab is used as delimiter in the file, open text fields will not be permitted to include tabs. There is no specific code for empty fields. If you have fields you want to indicate as empty, ("null" or "System Missing"), there should be nothing between the tabs. The files should have the same number of tabs on each row (same number of fields).

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.

Table 88: Question Labels in Import Files

25.3.7.3 Upload Files

Choose the file by browsing or specify the path of the file. Then click Set properties.

Figure 714: Choose file

Then you have to specify the "Import properties" for this import.

Figure 715: Import properties – Upload files

Property	Description
Project ID	The current project id. The import file will be imported to the database of this project.

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. It is used 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. 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 field width. Examples of key fields could be membership number, customer id or email address. If not using respid or responseid, it is recommended to set the "Indexed" property on the question you use to speed up the data import. Important: The fields respid and responseid are system provided ids in Confirmit. When <u>appending</u> 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.
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 sent to the specified email address in a zip file.
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 should be very certain of the quality of the import files to do this. See section 25.3.7.5 Validation.
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.

Table 89: Import Properties

When you press the "Upload" button 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.

25.3.7.4 Pick up files from server

After selecting "Pick up files from server" you are brought directly to "Import properties".

Import properties

Project ID p0128873

Database Production

FTP ☒

Leave file on server ☒

File name

File encrypted ☐

Import template All fields

File encoding ANSI

Key field

Decimal symbol . (point)

Email

Validate response Yes

Type of uploading ☒ Append ☐ Update

Figure 716: Import properties - Pick up files from server

Property	Description
Project ID	The current project id. The import file will be imported to the database of this project.
Database	Specifies the active database (Production or Test).
FTP	Only available/displayed to users with FTP and Data Transfer Encryption (see section 1.4.3 Data Transfer Encryption and FTP). The import files can be encrypted and uploaded from an FTP server.
Leave file on server	This setting is used in connection with the FTP setting. Choose this property if you want the file to be kept on the FTP server after it has been uploaded into Confirmit.
File name	Here you 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 (see section 1.4.3 Data Transfer Encryption and FTP). 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	You can 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. It is used 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. 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 field width. Examples of key fields could be membership number, customer id or email address. If not using respid or responseid, it is recommended to set the "Indexed" property on the question you use to speed up the data import.

	Important: The fields respid and responseid are system provided ids in Conformat. When <u>appending</u> 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.
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 sent to the specified email address in a zip file.
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 should be very certain of the quality of the import files to do this. See section 25.3.7.5 Validation.
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.

Table 90: Import Properties 2

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.

When you click Upload, 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.

The import files have to be put in that folder on the server before the task is set to execute, or else it will fail.

25.3.7.5 Validation

When validation is selected, the following validation is done 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 error messages:

- It is required that the specified key field for every row exists 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 'responseid' field is included, the input must be an integer larger than 0
- If 'respid' field is included, the input must be an integer larger than 0
- If 'interview_start' or 'interview_end' is included, the input value must be on the format 'YYYY-MM-DD HH:MM:SS'
- Duplicate key values are not allowed.
- Last column in the upload file must contain data in all rows

26 APPENDIX A: LIMITS

Respondent data

Question type	Limit
Open text	Unlimited
Open text w/ 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)

Meta data

Question title	255 characters
Question text	Unlimited
Question instructions	Unlimited
Answer/scale texts	2000 characters
Question ids	50 characters
Precodes	32 characters. Only alphanumeric characters and underscore (_), no white space.

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.

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

27 APPENDIX B: Confirmit LANGUAGE CODES

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 will differ from these.

513	Bosnian		bo
34820	Chinese	Mandarin	zh_mn
32772	Chinese	Simplified	zh_sm
33796	Chinese	Traditional	zh_td
512	Welsh		cy

28 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

I (unless you want to use it as described in chapter 15 Handling Respondents in Multilingual Projects)

L (unless you want to use it as described in chapter 15 Handling Respondents in Multilingual Projects)

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:

userid

password

language

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