

Confirmit 7.0 User Manual

(Manual Version 1.0)

June 9th, 2002

The information on these pages describes Confirmit and its features as of June 9th, 2002. 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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1 What is Confirmit?

Future Information Research Management (FIRM)'s vision is to help customers to derive tangible knowledge from intangible information. The Confirmit software is FIRM's answer to that vision. Confirmit is a comprehensive Web-based information retrieval and presenting software.

1.1 About this Manual

Confirmit software is available either as a server installation or "log-in". They do not differ in a substantial way, but in the instances they do, "log-in" specifics are marked with a gray background.

Throughout this manual we refer to different URLs, e.g.

<http://www.yourconfirmitserver.com/confirm/firm.asp>. You will have to substitute yourConfirmitserver.com with your actual server address, or www.confirmit.com for login users.

Please note that the terms "question" and "form" are to be interpreted in the same way.

1.2 Confirmit Users

Confirmit users may have either Advanced or Executive rights. Your Confirmit administrator is entitled to define this user level.

Login only:

Contact support@confirmit.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
- 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 questions and forms
- Create and publish reports
- Opportunity to give the end users of results access to reports online

1.2.2 Executive Users

These users are set up with permissions to view and comment on questionnaires and response data. They may view and order generated reports. They may NOT build questionnaires or create reports themselves.

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)

In order to use HTTPS/SSL one needs to obtain a server certificate from a certification authority (like VeriSign) and bind it to ones Web server(s). Our server customers are free to bind certificates to their servers. This is optional and not a Confirmit 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.

Login only:

FIRM has obtained and installed a SSL Secure Certificate on survey.confirmit.com.

If you want to run surveys using SSL, simply replace `http://` with `https://` in the survey link, e.g. `https://survey.confirmit.com/wi/pXXXXXXXXX/i.asp`

For mail sending, there is a new option "*Secure*" under "Include link" (disabled until you check "Include link"). When checking this, the URLs 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 it will take slightly longer to load the pages. This will hardly be noticeable.

The certificate is bound to survey.confirmit.com, so do not use HTTPS if you use a url with other domain names (e.g. www.confirmit.com).

In old surveys, the respondent will get a warning at the end page when the OK button is clicked and he/she is redirected to another site: "You are about to be redirected to a connection that is not secure. The information you are sending to the current site might be retransmitted to a non-secure site. Do you wish to continue?" The information is of course not retransmitted to the other site, but this might confuse the respondents and lead to unnecessary enquires. To prevent this, just re-generate the survey (Production->Generate WI). This will only be a problem for surveys generated before 2001-07-20.

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.

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 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.

Confirmit 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.

1.4.4 Back up of Meta Data

Login only:

By this we mean all the data of a project that is *not* response data. Every night, a back up copy of all meta data is saved to an external media and stored in a safe. The data is stored in a safe place, and may be restored should a system crash occur.

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

1.4.5 Back up of Response Data

It is possible to delete response data from the web application. You are always asked twice before doing this ("Are you 100% sure?"), but it *has* happened that a Confirmit user has accidentally deleted the response data of a running project.

It is the responsibility of the Confirmit user to make sure that this does not happen.

Login only:

However, the MS SQL server 7.0 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 up of response data also exist.

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

1.5 System Requirements

1.5.1 Confirmit Users

Confirmit is designed to function correctly in Microsoft Internet Explorer 5.0 or higher in Microsoft Windows™ 95/98/NT/2000/XP. Some functionality in Confirmit (GridView, Search/Replace, Survey Wizard, enhancements in Questionnaire and Reporting treeviews,) requires Internet Explorer 5.5 or 6.0. Wysiwyg HTML editor in single view in Individual Reporting requires Internet Explorer 5.5 or 6.0 (see chapter 13).

NB! Starting with the Confirmit version 7.0, the minimum requirement for project managers is Internet Explorer 5.0, English version.

Windows NT or Windows 2000 is required to be able to use Unicode in answer lists.

Clients **MUST** be able to install and run ActiveX components. (Certain firewall set-ups do not allow this over the internet.)

The components needed are:

"VSFlexGridPro6", "The First Impression" and "Office Chart Component".

These components can be delivered independently by FIRM to be installed directly.

In addition, clients **MUST** allow cookies. Some firewalls and browser settings might prevent cookies from being downloaded. In this case, Confirmit project management **will not work**.

1.5.2 Unicode Support for Confirmit Server Installations

To support more than the "Western European" character set on a Confirmit server installation *will* require that Windows 2000 is installed on the authoring and deployment servers. This is due to limitations in MS Internet Information Server 4.0. This issue has been addressed in MS IIS 5.0, which will only install under Windows 2000. We are investigating the possibilities for solving this by implementing our own character set conversion components.

Please note that system generated error messages are translated into English, Norwegian, Swedish, German, French, Spanish, Finnish, Danish, Italian, Dutch, Flemish, Portuguese, and Japanese. For other languages, error messages will be defaulted into the main category (eg: Venezuela Spanish into Spanish), or into English if that language is not available.

Server installation customers: See Confirmit Administrators' Manual for information on how to add system generated messages in other languages or change those in already existing languages.

1.5.3 Respondent Requirements

The web survey participants are presented with an easy to use, standard HTML page for entering data into Confirmit. The survey itself requires no knowledge of Confirmit whatsoever. Participants are directed to a survey through links on other web sites, or through email invitations sent directly to them.

All interview files support the HTML 3.2 standard, which means that older versions of Netscape and MS Internet Explorer are supported.

End Users accessing Pivot Views will need Flash 5.0 installed.

The Advanced WI options (see Chapter 7 Preparing for Data Collection) and Advanced layout properties (see Chapter 5.2.1.5 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.

1.5.4 3rd Party Downloads

The Confirmit application does not rely heavily on 3rd party components. Currently three downloadable components are integrated:

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

Table 1: 3rd party downloads

2 Entering Confirmit – a General Overview

2.1 Confirmit Login

Users log in to Confirmit from this URL:

<http://www.yourConfirmitserver.com/confirm/firm.asp>

Login only: You can also log in to Confirmit by choosing “Login” on FIRM’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.



The image shows the Confirmit login interface. At the top, there is a banner with a globe graphic on the left and the word "confirmit" in orange lowercase letters with a checkmark on the right. Below the banner is a login form with two input fields: "User" and "Password". To the right of the "Password" field is an orange "Log in" button. At the bottom right of the form, there is a small text that says "Created by FIRM".

Figure 1: Login box

When a user tries to access the login-page with an incorrect username/password the number of attempts he makes will be counted, and when the counter reaches 99, the user gets a message that he has to contact his Confirmit administrator to get access. The user will not be able to log in again until an administrator reopens his access.

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

Server customers can themselves set the necessary number of attempts in the registry settings; the default number of attempts is 3.

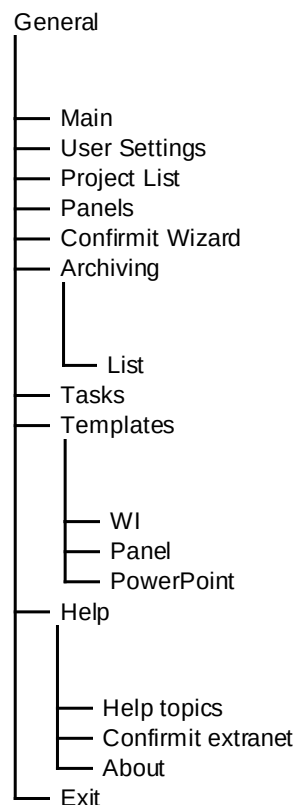
2.2 Confirmit Menu Structure

When you have logged in to Confirmit, you will be brought to the first page of Confirmit. In the left-hand margin you will find a menu structure that is divided into two main sections: *General* and *Project*. These menus navigate you through both, the main and project specific, features of Confirmit.

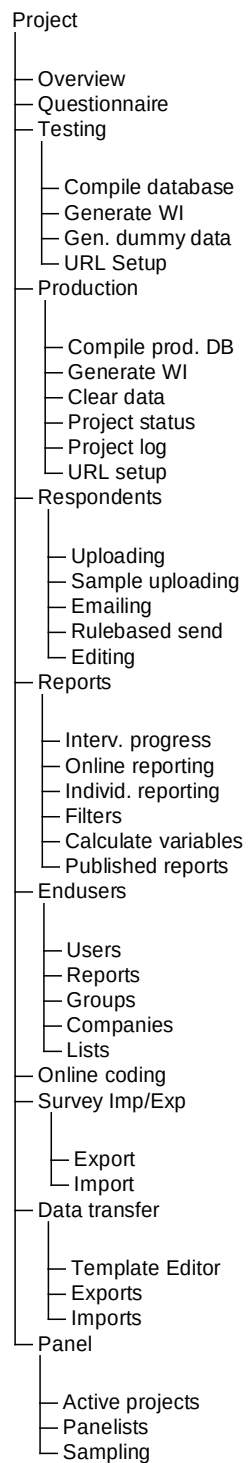
The following chapters offer a more detailed description of every choice in the menu.



Figure 2: Confirmit menu



This and the following figure offer you an overview of all the menu links with their subsections.



3 General

This section describes the functionality under “General” in the menu.

3.1 Main Page

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

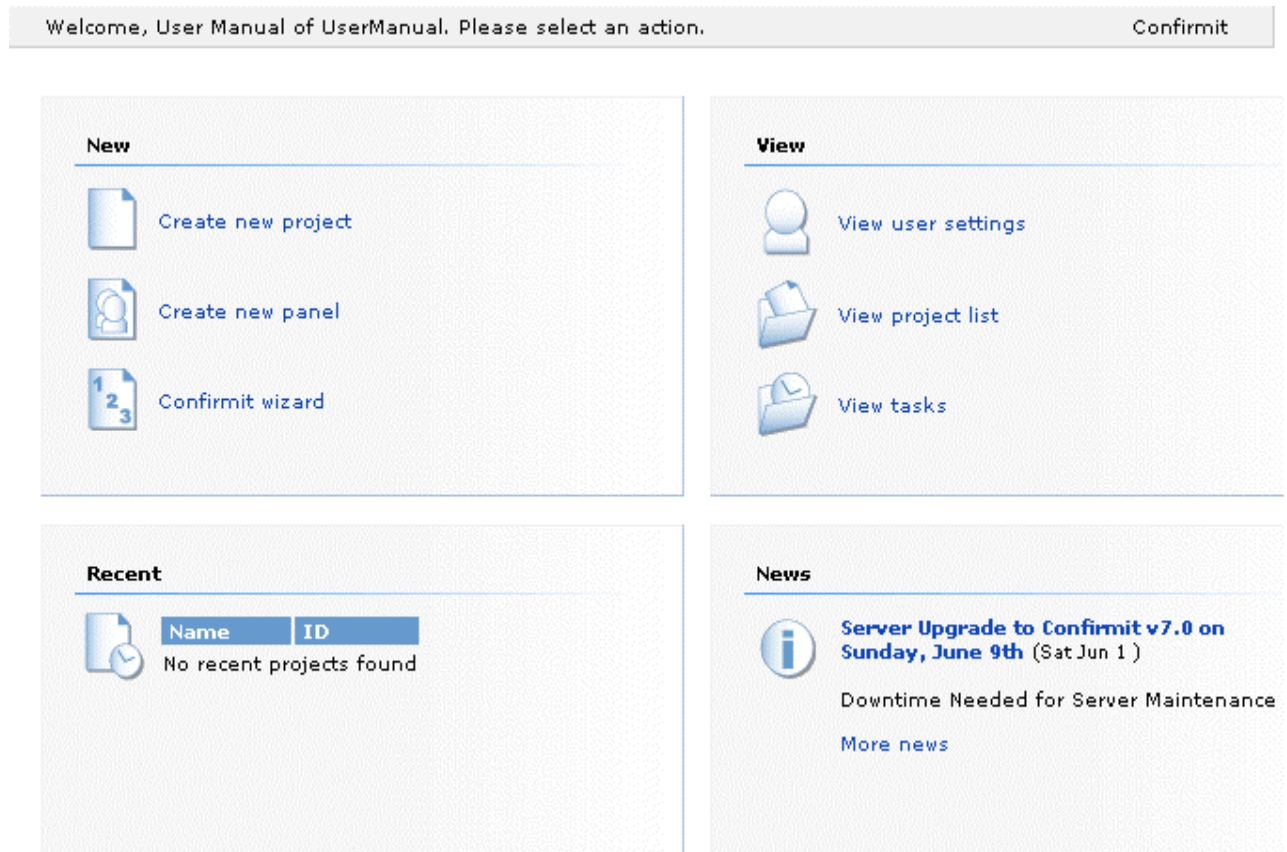


Figure 3: Welcome page

Under *Recent*, the projects you recently have been working with will be displayed.

3.2 User Settings

Each user has a profile set up at login. The profile holds information about the user's name, email address, preferred language, screen resolution.

The user may change his/her user settings at any time.

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@firmglobal.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]	
Save		

Figure 4: User settings page

Setting	Changeable	Description
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.)
First name, last name	X	Name of the user. Used mainly for interaction with other users.
Language	X	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 has been introduced into Confirmit. The user will be able to choose any language when designing a questionnaire.
Display	X	Use this for optimizing your screen resolution with the Confirmit software. After having made changes to your display settings, refresh the browser (F5).
Email	X	Email address of user. 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.
User level	(X)	Some users are set up with permissions to change their user level between Advanced and Executive. See 1.2.
Microsoft Office Version	X	Users can choose what Office version to use for PPT/Excel exports from their user settings. By selecting 'Newest version', the newest version installed on the export server will always be used. Currently this is Office 97. Excel exports will never be made in Excel 4.0 and older, though, since these old versions do not support more than one worksheet for each workbook.
Chart Component	X	Use this to choose between First Impression or Excel components in Online Reporting. Excel component is recommended, especially if you are planning to publish the report (see 11.13 Report Publisher).
Coding Screen Size	X	Here you 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, e.g. prev 10, next 10. See Chapter 10.
Working set size	X	Here you specify the number of answers you wish to work with at a time. If you e.g. have 50 000 answers, you may wish to work in smaller batches, as e.g. 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 10.
Answer list font	X	Here you can specify the font of the entries in Answers list. Usually it will remain empty, but in cases it is necessary to use e.g. Chinese, you will have to specify a font that supports the Chinese character set, e.g. SimSun or PmingLiu, or Arial Unicode MS
Enable unicode	-	Check this box to be able to use Unicode supported characters. Applies only for users of NT and Windows 2000.

Table 2: User settings fields

3.3 Project List

The project list is the main project organizer. It consists of *Favorite projects*, i.e. projects you have been working on recently. The list may be sorted by clicking the header of the column by which you want to sort the projects.

The list may be filtered in a number of ways, by *time* (*created* column) or by *search parameters* (all other columns). You only have to enter the first letters of the criteria on which the search is to be based. The system will return all matches. Example: Specifying “ex” in the *name* column will return all projects starting with the letters “ex”.

If you want all projects to be listed, enter a ‘*’ in any column under *search projects*.

You may enter a project directly from this list by clicking the project name or the project ID.

The user can Add, Remove, and Delete several projects at a time. Depending on the action chosen in the dropdown, the name on the button next to the dropdown will change. Only system administrators and users with Delete permissions to a project will be able to delete a project from the project list.

When the list of your Favorite projects contains a considerable number of projects, you may want to remove the ones that you currently do not work on by choosing Remove from favorites from the dropdown, choosing the projects, and clicking the Remove button. **This will not delete the projects, but move them from the Favorite list.**

In case you wish to access the removed projects, you can use the *Search projects* fields. All projects the user has been granted access to will be listed according to search criteria. You may move these projects to your Favorite list by choosing the projects and clicking the Add button.

The screenshot displays the 'Project List' interface. At the top, there is a search bar with the text 'Select a project from your favorites, or search for projects below' and a 'Confirmit' button. Below this is a table with columns: 'Name', 'any', 'Creator', 'Created', and 'Closed'. The 'Name' column is filtered with the text 'ex'. A dropdown menu is open over the 'Name' column, showing options: 'Delete projects', 'Remove from favorites', 'Delete projects', and 'Add to favorites'. The table lists two projects: 'Example Survey p0011200 UserManual' and 'Example Survey p0011586 UserManual'. Below the table is a 'Search projects' section with a search bar and a 'Search' button. At the bottom left, there is a 'Delete' button.

Name	any	Creator	Created	Closed
Example Survey p0011200 UserManual		Manual, User	24-May-02 1:33:50 PM	
Example Survey p0011586 UserManual		Manual, User	24-May-02 1:36:24 PM	

Figure 5: Filtered project list

3.4 Confirmit Wizard

The Confirmit Wizard enables you to create simple questionnaires and reports in a very short time, following an easy four-step procedure.

The Confirmit Wizard can be used by Confirmit users when the advanced features of the Questionnaire Designer and Online Reporting are not needed, or by persons who are occasional Confirmit users.

A survey created in the Wizard will always be available in the Project List. The questionnaire and the reporting trees will be available for modification after the initial Confirmit Wizard Submission.

The four Wizard steps are:

- 1) Survey overview page
- 2) Survey designer
- 3) Survey options
- 4) Report options

A detailed Context specific help will appear with each step of the Wizard.

3.5 Archiving

Archiving functionality allows storage of projects that have been 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.

Clicking on the menu option *Archiving > List* will display the Survey list page:

The screenshot displays the 'Survey List in Archiving' interface. At the top right, the project ID 'p0011200' is visible. Below it is a table with the following columns: Name, Project id, Created, Creator, Customer, Expire, Email recipient, Archived, and Panel. The table contains two rows of data:

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

Below the table is a 'Details' section for the selected project. It contains the following fields:

- Project id: [text input]
- Email recipient: [text input with value 'ual@firmglobal.com']
- Expiry date (yyyy/mm/dd): [three separate text inputs]
- Do not expire: [checkbox]

A 'Save' button is located at the bottom of the details section.

Figure 6: Survey List in Archiving

As shown in Figure 4, the user has searched for all projects available to him by entering asteric in the Name field.

Confirm it 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	Se
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

p0011200

Email recipient

usermanual@firmgl

Expiry date (yyyy/mm/dd)

2002

6

10

Do not expire

☐

Save

Figure 7: 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.

Project archiving details

Project id

p0184993

Email recipient

test@tester.com

Expiry date (yyyy/mm/dd)

2002

5

18

Delay by 7 days

☐

Do not expire

☐

Save

Figure 8: 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.

3.6 Task Management

Task management lets you track the status of your Confirmit batch jobs, including MS PowerPoint exports, SPSS exports etc.

When placing requests for exports (e.g. SPSS), users may select a starting time for the execution of the task: Immediately, at midnight or at a specified hour.

The task management page has five tabs:

1. Queued tasks: A list of the user's pending tasks.
2. Executing tasks: Task currently being run on the batch server.
3. Aborted tasks: Tasks that for some reason did not finish within the specified timeframe.
4. Completed tasks: Tasks that did finish within the specified timeframe.
5. Recurring tasks: Tasks that have been scheduled to recur at specified time intervals.
6. Search tasks: Here you can search for your batch job to check their status. You can search by various parameters:
 - Task ID: the ID number given to the batch job by the system.
 - User ID: the username of the Confirmit user
 - Project ID: the system generated project number.
 - 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.

Search tasks

Queue

Exec

Compl

Abort

Recurr

Search

Disable

Task ID	Project ID	Schedule	Status	Task type	Comment	Recurr
21186	undefined	29.05.2002 17:11:32	Completed	Survey import		No

Figure 9: Task management

If you click on the *Task ID* number, you will be brought to the *Task instance properties* overview where you get information about the particular job's Schedule, Status, percentage completed, Start time and End time, and Time usage. You can get a complete system log overview for batch job in *Log entries* section of the Task settings. By clicking on Task Definition button, you can get an overview of the Recurrence pattern of the particular job, and change it if necessary by clicking *Change* button on the Recurrence pattern page.

NB: Confirmit sets a time limitation for how long a task can run before it is killed. This is done to avoid unnecessary strain on the server if there is an error with the file. However, this may also result in heavy tasks (e.g. based on long questionnaires) being killed before they are completed. Ask your Confirmit administrator to manually adjust the time limitation, should it become necessary.

Login only:

Contact FIRM Customer Services for help: support@confirmit.com

3.7 News Page

Click *News* to learn about the latest updates to Conformat. 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.



Figure 10: News

3.8 Templates

From the *General* menu, a *Templates* link leads to three subsections, MS PowerPoint templates, Panel Templates, and Web Interview (WI) templates. Conformat templates are always bound to a specific client.

3.8.1 Web Interview Templates

Web interview templates define the layout of web interview files and published reports. Currently a WI template is defined by

- Name and description
- Page body (i.e. background image or background color)
- Page header and footer
- Font attributes
- Header/body/footer of individual questions

It is possible to add new web interview templates by duplicating and editing existing ones. This requires some HTML knowledge. It is important that you push the Save button after having made changes *before* you go to the Preview.

The primitives you can use in the templates have to be prefixed and suffixed by caret (^):

SNAME Survey name

HELP Help link

LOGO Your company logo

NAVCTL Navigation bar (back/fwd)

CLINK Continue link

FTITLE Form title

FNAME Form name

FTEXT Form text

FCOMMENT Form instruction

INPUTS Form inputs

QNUM Question number

3.8.1.1 The Fields in the WI Template Edit Modus

Name: The name of the template

Body attributes: Controls the design of the whole page: background colors, picture (background picture), margins etc.

Error font attributes: Controls the font size/color of the error messages in a WEB survey.

Grid color: Controls the color of the gridlines in a grid question.

Horizontal label font attributes: Controls the “scale” text in a grid question.

Vertical label font attributes: Controls the “answers” text in all questions.

Page header: This field controls the layout of the top of the pages. You may e.g. insert and edit logos and the name of the survey in this field, e.g. ^LOGO^, ^SNAME^.

Page footer: Controls the bottom of the pages, e.g. company’s name and the navigation buttons, e.g. ^NAVCTL^.

Information form header: Controls the design of the upper part of an information form, both background color and text (font size, color etc.), e.g. ^FTITLE^.

Information form footer: Controls the area immediately under the information form (similar to Page footer).

Information form body: Controls the design of the information form body, background color, text of the information form, and comments, e.g. ^FTEXT^, ^FCOMMENT^.

Data form header: Controls the design of the upper part of an open, grid, single, multi question form; background color and text (font size, color, etc.), e.g. ^FTITLE^.

Data form footer: Controls the area right under the question (similar to Page footer).

Data form body: Controls 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^).

Progress bar font attributes: Controls the design/font size of the percent numbers under the bar.

Progress bar background color: Controls the background of the progress bar.

Progress bar image: Controls the moving progress bar that shows the progress of the survey.

You can make a reference to an image by including the following tag in the template fields:

<img scr=” <http://www.somewhere.com/images/image.gif>”>.

NB! 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.

3.8.1.2 Published Report Templates

The following four fields control the layout of Published Reports (See 11.13). 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 header: This field controls the layout of the top of the pages. You may e.g. insert and edit logos and the name of the survey in this field.

Report footer: Controls the layout of the bottom of the pages, e.g. company’s name.

Report light/dark color: The index and tables in the published reports are by default in the light and the dark blue colors that are used in Confirmit. If you wish to apply other colors to your report, you may specify HTML color codes in these fields.

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

3.8.1.3 Pivot View Templates

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

Pivot View menu header: This field controls the layout of the top of the pages. You may e.g. insert and edit logos and the name of the survey in this field.

Pivot View menu footer: Controls the layout of the bottom of the pages, e.g. company's name.

Pivot View menu light color/dark color: The tables in the published Pivot Views are by default in the light and the dark blue colors that are used in Confirmat. If you wish to apply other colors to your report, you may specify HTML color codes in these fields.

Pivot View menu background color: Here you may specify the background color of the Pivot View.

NB! The primitives cannot be applied to Pivot Views.

3.8.2 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.

3.9 Help

In the General menu you find a Help button. When one clicks on the button, a new browser window named Confirmat Help opens offering Confirmat users four links with various help information:

Step-By-Step includes demonstrations with screen shots and text from all the main areas in Confirmat.

User Manual is identical to this paper edition. The document is indexed, searchable and has internal linking (e.g. by clicking on a topic in Table of Contents, you get directly to the topic).

Layout includes a comprehensive Template guide, as well as useful HTML codes.

Customers with server installations may choose whether they want to have access to our extranet, or to have the last updated Help page in Confirmat on their server.

About: Here you can find Confirmat build information.

3.10 *Exiting Confirmit*

Log out of Confirmit by clicking *Exit* in the left margin. To prevent other users from accessing Confirmit, please close the browser e.g. by clicking the *Exit Internet Explorer*-button.

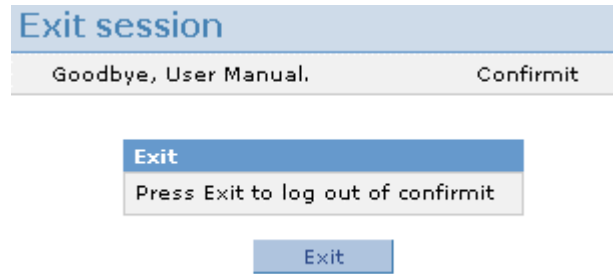


Figure 11: Exiting Confirmit

When you click on the Exit button, you will be brought to the Login page.

4 Project Overview

A new blank project may be initiated by clicking *Initiate new project* from the main page, and then clicking *New*. You can also choose whole questionnaire templates from this page (for more information on this subject see 5.10.5 Templates in Library). This will automatically take you to the *Project list*. Your initiated project will be positioned at the very bottom of the project list, named *New blank project*. Click on it in order to come to the *Overview* page of this project.

This is the page you are brought to when you click on existing projects in the project list.

Project details

Project ID p0107973

Project name Example Survey

Company UserManual

Description

Languages

Available		Selected
Afrikaans	>>	English
Albanian	<<	Norwegian
Arabic		
Arabic (Algeria)		
Arabic (Bahrain)		

Creator Manual, User

Created 29-May-02 5:07:04 PM

Status

Deployment

[Save](#)

[\[Object permissions \]](#) [\[Duplicate project \]](#) [\[Delete project \]](#)

Figure 12: Project overview page

Field	Description
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 <i>Available</i> field contains all the languages that are supported in Confirmit. The <i>Selected</i> field will contain the working languages of your project. You highlight a language in the <i>Available</i> field and click the arrow button to add it to the <i>Selected</i> field.
Status	Project status. (See 7.5)
Deployment	Survey type (Public/Limited/Pop-Up) Web Interview.

Table 3: Project overview

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

Figure 13: Project Info Titles and Info Fields

Field	Description
Title	The title of the project, which you want to be displayed for the End Users of reports.
Start date	Info field stating the start date of a survey.
End date	Info field stating the end date of a survey

Table 4: Project Info Titles and Info Fields

Figure 14: 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 info 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 5: Administrator Info Fields

Figure 15: 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 6: Check Growth Fields

4.1 Object Permissions

When you click on the link *Object permissions*, you are brought to the following page:

ExampleSurvey

Users in company						
Name	-	R	W	D	Administrate projects	Opentext coder
john (John Smith)	☒	☐	☐	☐	☐	☐
user (User Manual)	☐	☐	☐	☒	☒	☐

Groups						
Name	-	R	W	D	Administrate projects	Opentext coder
Other users/groups						
Name	-	R	W	D	Administrate projects	Opentext coder

Figure 16: 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 is not allowed to add new or delete existing elements in the questionnaire.
W	The user has Write permission, i.e. he/she is allowed to add questions to the questionnaire.
D	The user has Delete permission, i.e. he/she is fully allowed to work on the questionnaire including the permission to delete it.
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. This is usually the person who initiates the project.
Coder of opentext questions	The user has the permission to code open-ended questions in a specific project. See Chapter 10.

Table 7: Object permissions

For all projects it is true that the user who initiates 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.

Login only:

Personnel at FIRM 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*. **NB! Make sure you do not have any space after the last character in the user key.**

Figure 17: 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/groups* field.

ExampleSurvey

Users in company							
Name	-	R	W	D	Administrate projects	Opentext coder	
john (John Smith)	☒	☐	☐	☐	☐	☐	
user (User Manual)	☐	☐	☐	☒	☒	☐	

Groups							
Name	-	R	W	D	Administrate projects	Opentext coder	
Other users/groups							
Name	-	R	W	D	Administrate projects	Opentext coder	
TestUser ()	☒	☐	☐	☐	☐	☐	

Figure 18: A New User Added to Other Users

4.2 Duplicate Project

It is possible to duplicate whole projects in Confirmit by clicking *Duplicate project* link under *Project Overview*. The system duplicates the entire questionnaire routing and reports.

You may afterwards apply changes to the questionnaire.

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

4.3 Delete Project

You may delete projects by clicking *Delete project* link under *Project Overview*.

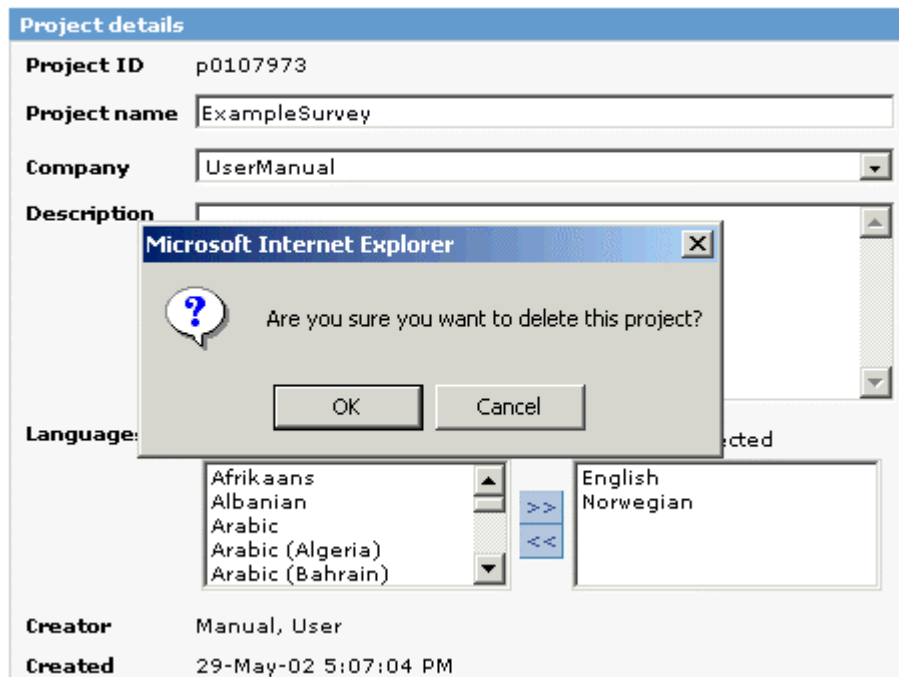


Figure 19: Deleting a project

Before actually deleting, Conformat will generate the message above, warning you that you are about to delete a project.

NB! This is an irreversible action.

4.4 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.

5 Building Questionnaires

5.1 Creating a New Questionnaire

A project's questionnaire is created as a list of consecutive objects. Together they define the routing of the survey. You access the questionnaire by clicking on the menu item *Questionnaire*. An empty questionnaire will look like *Figure 20*. Note the three folders, *Routing*, *Scales and lists* and *New objects*.

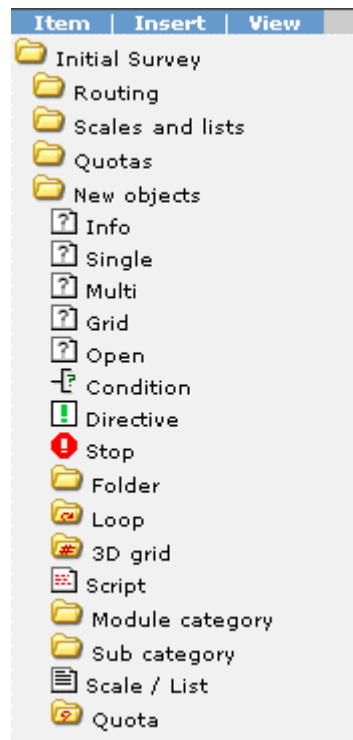


Figure 20: Questionnaire view

5.2 Adding New Objects to the Questionnaire

You design your questionnaire by dragging objects from the *New objects* folder, and dropping them in the *Routing* folder. For instance, dragging and dropping a *Single* object from *New objects* into the *Routing* folder, will insert a new single punch form as the first question in the routing. Another way of inserting an object is to highlight the preferred destination of the object, then selecting the corresponding object-type from the *Insert* menu. The new object will be placed after the destination object.

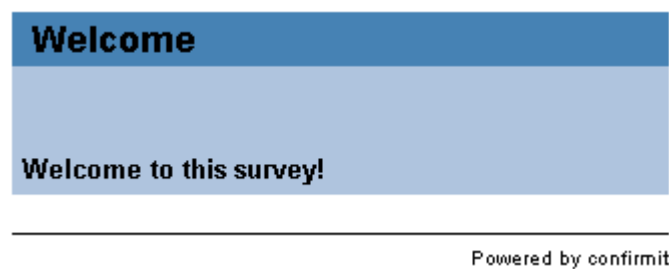
After you have inserted an object into the routing, it will appear in the routing as a new icon. Double click the object for editing. You can also right-click on the object, and choose *Edit* from the opened menu. Below you will find a description of the different routing-objects available.

5.2.1 Forms

There are currently five standard types of forms available:

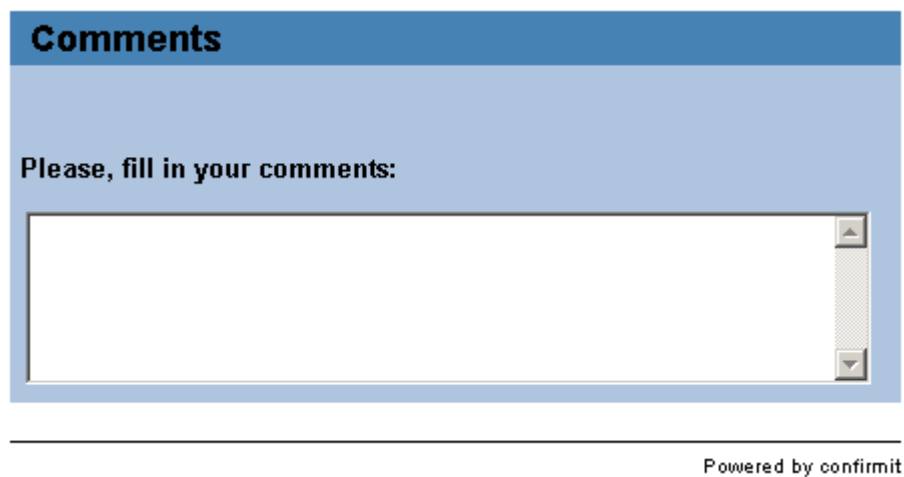
Form type	Description
Info	Used for information pages in the survey.
Single	Single-punch question. The respondent can select one answer from a list.
Multi	Multi-punch question. The respondent can select several answers from a list.
Grid	A question type that lets the respondent to evaluate a list of variables along a scale.
Open	An open-ended question where the respondent can enter his or her response.

Table 8: Standard form types



The screenshot shows a form with a blue header bar containing the word "Welcome" in white bold text. Below the header is a light blue rectangular area containing the text "Welcome to this survey!" in bold black font. At the bottom right of the form, there is a small text label "Powered by confirmit".

Figure 21: Info Form



The screenshot shows a form with a blue header bar containing the word "Comments" in white bold text. Below the header is a light blue rectangular area containing the text "Please, fill in your comments:" in bold black font. Underneath this text is a large white text input field with a vertical scrollbar on the right side. At the bottom right of the form, there is a small text label "Powered by confirmit".

Figure 22: Open Form

Age

Specify:

- ☐ 15-24
- ☐ 25-34
- ☐ 35-44
- ☐ 45-54
- ☐ 55-64
- ☐ 65 and older

Powered by confirmit

Figure 23: Single Form

Cars

Which have you testdriven?

- ☐ Volvo
- ☐ Saab
- ☐ BMW
- ☐ Audi
- ☐ Ferrari
- ☐ Fiat

Powered by confirmit

Figure 24: Multi Form

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

Powered by confirmit

Figure 25: Grid Form

To create and edit a form, insert it into the routing, and then double click it, or right-click on it and choose an action from the menu that appears. This will bring up a *details view* of the form on the right hand side of the routing. 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, i.e. click on one of the tabs. Note that if you have made modifications in one of the details view pages, and the next action will take place outside the details view frame, remember to click *Save*. Not all pages are available for all form types.

If a user has a read-only access to a question, it will be stated in the question form window, and there will be no *Save* button.

i8 - Welcome (Read only)

Text Properties Preview Tracking Languages

Figure 26: Read Only Acces to Questionnaire

5.2.1.1 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 5.2.1.8)

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 3.8.1.1)
Text	The form text. (In templates, you may use the primitive ^FTEXT^ where you want to insert this text. See 3.8.1.1)
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 3.8.1.1)

	use the primitive ^FCOMMENT^ where you want to insert this text. See 3.8.1.1)
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 9: 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 (e.g. underline the text) of the text by adding HTML codes directly into the textfields or answer cells.

You can e.g. make a reference to an image by including the following tag in a text fields or an answer cell:

<img scr=" <http://www.somewhere.com/images/image.gif>">.

NB! 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.

5.2.1.2 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.

q6 - Gender								
Text	Answers	Properties	Preview	Tracking	Languages	Save		
Answers								
English	Norwegi	Precode	Weight	ColWidth	BgColor	Punch	KeepPos	Other
Male	Mann							
Female	Kvinne							

Add Add predefined Clear Delete rows Save

Figure 27: Answers page

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

Field	Description
Language fields	The first columns in the list contain the text of the answer. There is one column for each active language (see 5.2.1.8). 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 should only contain alphanumeric characters, with no white space. The maximum length is 32 characters. 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. E.g. 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 need to 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 e.g. 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.
Punch	[Applies to Multi questions only] Gives you the ability to define one or more elements in a multi-punch list as single-punch (e.g.: "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 <u>have</u> 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 color codes is to be found under Help/Quick cards/HTML Colors 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 a list (e.g. "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 5.2.1.5 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 5.2.1.5 Properties), i.e. it will be sufficient to answer the other elements in the Grid.

Table 10: Answers page

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.

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 5.2.1.4). This is very powerful when reusing for instance 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.

The scratchpad is explained in 5.6 Scratchpad.

5.2.1.3 Scale

[Only available for grids]

This page defines the *scale* dimension of a grid. The page is functionally equal to the *Answers* page.

5.2.1.4 Lists

Quite often, one or more scales, or one or more brand-lists, product-lists, etc. are reused several times in a questionnaire. Confrimit lets you predefine such lists, and reuse them in forms (see 5.2.1.2 *Answers*), or even in other lists (nested lists). Whenever 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 shows up in the drop-down list when inserting the predefined-list in another form or list.
Answers	The answer-list behaves like the list in forms and loops. See 5.2.1.2 <i>Answers</i> 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

5.2.1.5 Properties

This page lets you define several aspects of the form-object. In brackets we specify which kind of questions the properties apply for.

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 32 characters. 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. NB: You do not have to change the default ID of a form, even if you introduce the form between other existing forms (e.g. at a late stage of the questionnaire construction). If you anyway do change the ID, be very careful to give it a unique ID! So if you introduce a new form between forms q5 and q6, q5 being a multiple question, do not label the new one q5_2, as this is the code for the second alternative in the original question q5! 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.
Precode mask	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 6.4 for a description of expressions.
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, Multi, and Grid questions, is 32 characters 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.
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.

List Rows/Columns	[Single, Multi, Grids] Divides the answer list in 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.
Numeric	[Open, Multi with OpenText selected] If “Numeric” is selected and you click save, then input fields for “Precision” (integer $0 < p \leq 38$. Specifies the maximum total number of decimal digits that can be stored, both to the left and to the right of the decimal point), “Scale” (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 containing the choices “>” and “>=”. For “Upper limit”, there is a dropdown containing “<” and “<=”. “Field width” is now not available, because Precision replaces it. For a Multi with the OpenText selected (in Properties you choose Open Text and click Save. The Numeric flag will be displayed. Choose the Numeric property and click Save. The Precision, Scale, Lower limit and Upper limit fields will be made available.), the same “Precision”, “Scale”, “Lower limit” and “Upper Limit” will be applied for all fields.
Validation code	For unlimited flexibility in question-validation, you can write JScript-code to validate your answers. See Chapter 6.
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 10.
Randomize	[Available in Single, Multi, Grid] When checked, the list of answers will be randomized. The answer alternatives that have KeepPos property set to Yes, will keep their original position in the list.
Recoded var	[Single, Multi, Open] Used in Reporting. Turns this form into a recoded variable, which will not show up in the interview. You can predefine complex recoding rules in SQL or JScript (see Chapter 12)
Background var	[Single, Multi, Open] Treat this form as a background variable. Background variables are by default Hidden. The form will not show up in the interview, but will fetch its value from the respondent list. Very useful when you have information on 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 8.
Panel var	Treat this form as a Panel variable. Panel variables are by default hidden. For more information, see Chapter 9.
Hidden	[Single, Multi, Open] 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, e.g., “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.
Ordered	[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	[Multi] Instead of checkboxes, open text boxes will be displayed. When saving, the properties Columns and Numeric will appear. The size of the text boxes is defined in Columns.
Dropdown	[Single, Grid] Singles and grids are normally represented as rows and columns of radio buttons. This flag will generate dropdown-boxes instead.
Not required	[All] Normally, all questions require an answer if you have checked off the option Answer Required in WI Generator (see 7.2.1). 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.
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 <i>Show deleted nodes</i> (see 5.5 Editing the Routing), you can undelete the object by unchecking this flag.
Password	[Open] Makes it possible to collect data from the screen in a password style. The letters will appear as **** on screen. You may then perhaps want some validation of the password, or screening: If <i>the password question</i> has question id q1 you could use a condition like this in your validation code: IF (f('q1') == "secret_password") THEN . . . For organizations that want to do internal surveys but don't want to have 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.
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 10.

Table 12: General form properties

Property	Description
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
Autocheck	[Single, Multi] The Other- Specify answer alternative will be selected automatically

Other	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.

Table 13: Advanced Layout Properties

5.2.1.6 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, the template you have chosen will also be applied in Preview.

5.2.1.7 Tracking

The tracking functionality allows you to trace where and when a particular question has been used. This applies to questions that are saved in Confirmit Library and reused in several projects over time. Questions are traceable as long as you do not change their Question ID. You may change titles and texts, though.

5.2.1.8 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.

5.2.2 Conditions

Using condition-objects, you can create *skip-logic* in your questionnaire. To create and edit a condition, insert it into the routing, and double click it. You insert conditions wherever you want to alter the flow of a survey based on a Boolean expression that either evaluates to TRUE or NOT TRUE, for instance based on the answer on a previous question. If the expression evaluates to *true*, the survey-mechanism will execute the routing-objects beneath the *THEN*-node. If the expression does not evaluate to *true*, the objects beneath the *ELSE*-node will be executed, if the *ELSE*-node exists.

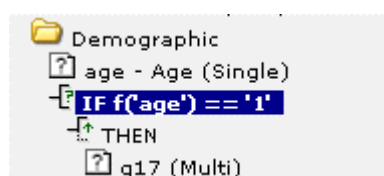


Figure 28: Conditional node

The expressions are written using JScript. Expressions are described in Chapter 6.3. and to help building expressions, there is a *condition builder* (see 5.2.2.2).

5.2.2.1 Description of Fields

Field	Description
Expression	A JScript-expression evaluating to <i>true</i> or <i>false</i> . Described in detail in Error! Reference source not found. Conformat Scripts.
Branches	Select whether the condition should include an <i>ELSE</i> -branch or not.
Deleted	Used the same way as in forms. When you delete a condition from the routing, it is not permanently deleted, but the “deleted”-flag is set. If you turn on <i>Show deleted nodes</i> (see 5.5 Editing the Routing), you can undelete the object by unchecking this flag.
Do not perform delete:	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). But sometimes you do not want to delete the previously entered data. This could e.g. 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. 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 you have to check this property.

Table 14: Conditional fields

5.2.2.2 Condition Builder

The condition builder helps you to build JScript expressions.

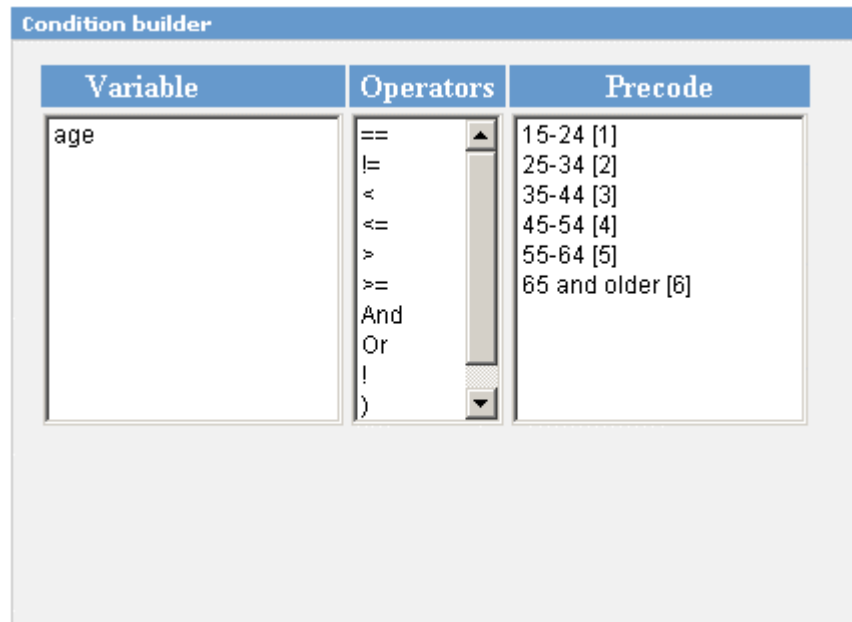


Figure 29: Condition builder

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 15: 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 16: Single/grid operators

Description	Method/operator
Includes	.inc(
Union	.union(
Intersection	.isect(
Difference	.diff(
Logical AND	&&
Logical OR	
Logical NOT	!
End parenthesis	)
Comma	,

Table 17: Multi operators/methods

Remember that each part in a condition has to be a complete statement.

Example: You have an age question with 6 answer alternatives. You want to include a condition that selects only respondents who have answered '1' or '2'.

This is the correct condition:

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

Here '2' is a statement!

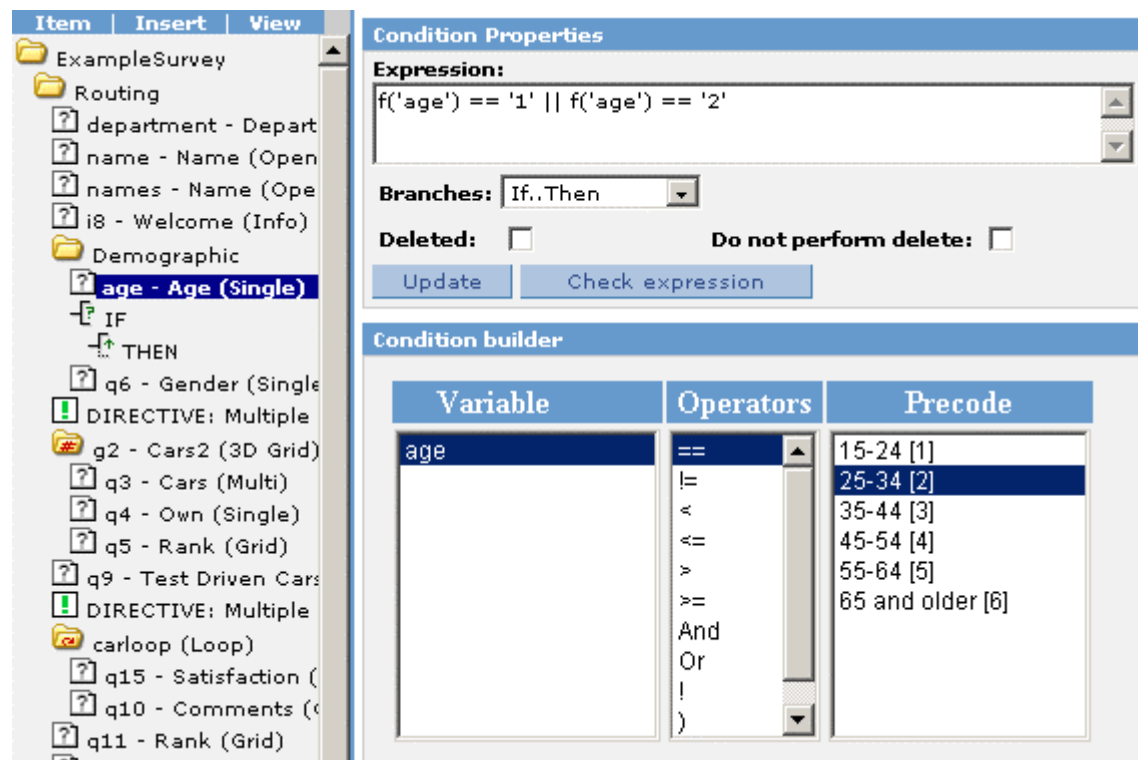


Figure 30: Correct Condition

Incorrect Condition

This is not a correct syntax:

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

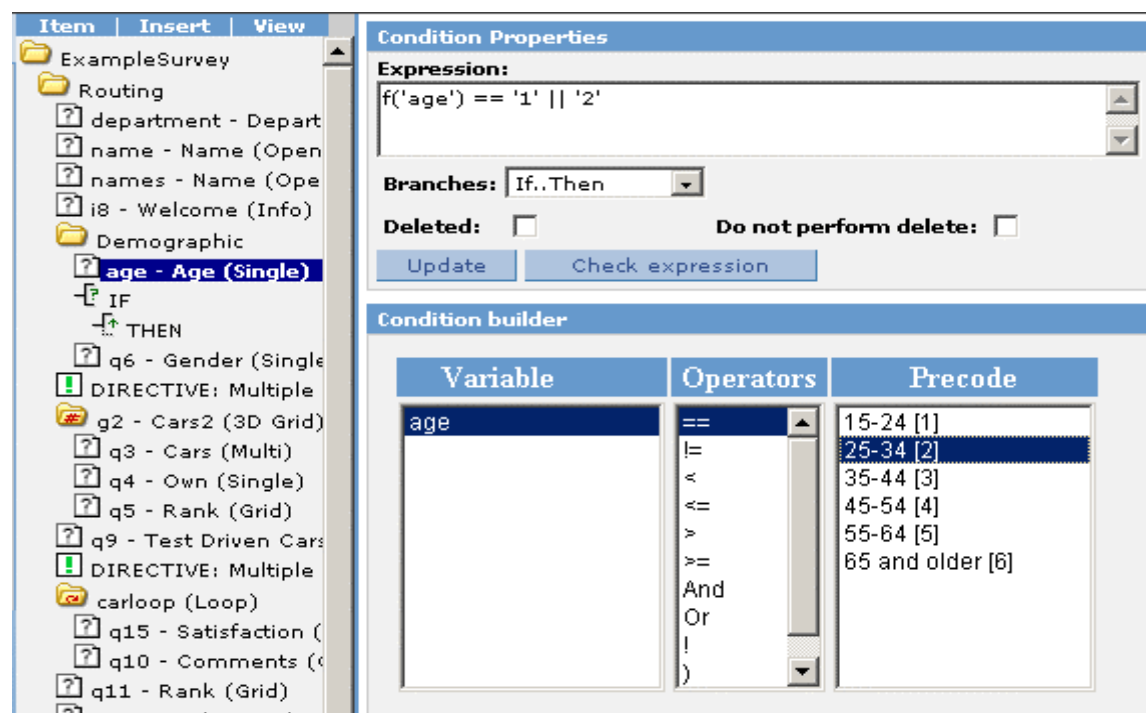


Figure 31: Incorrect Condition

NB! 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 and not numbers. 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 constructing a condition with greater than or less than, using a method called `.toNumber()` like this: `f("q1").toNumber()<3`. Using this, the expression will be true for 1 and 2, as expected.

See 6 Confirmit Scripts for a more thorough description of Jscript syntax in conditions.

To check if your expressions are correct there is a Check Expression button. The Check Expression might however sometimes give you a warning, even if your expression is correct:

Error in expression

Object doesn't support this property or method

Confirmit allows all valid Jscript expressions whereas the Check Expression is built only to accept the most basic expressions. You will also get a similar warning when you compile your project (see 7.1.).

Test your project to see whether the condition works as intended.

5.2.3 Inserting Page Breaks: Directives

Directives are instructions to the interview-generator that apply from where they are inserted in the routing and forward. The directives are used for inserting page breaks in the questionnaire.

At the moment, two directives exist:

Directive	Description
Multiple questions per page	This directive will instruct the interview-generator to display the succeeding questions as a batch of questions on one page. There will be a break when a condition, precode mask or a new Multiple questions per page- or One question per page-directive is encountered. Example: If you want a web-survey to break for each ten forms, insert a Multiple questions per page after every 10th form.
One question per page	One question per page, i.e. a page break will be inserted after each question.

Table 18: Directives

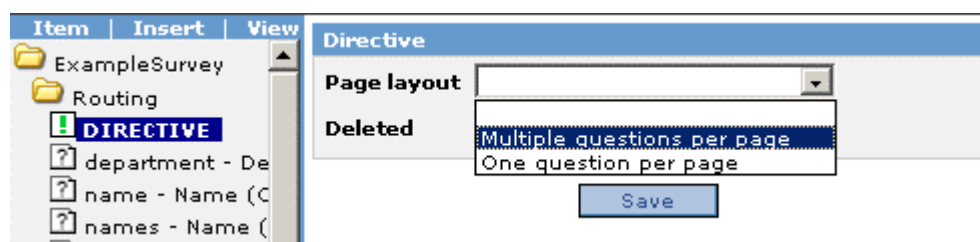


Figure 32: Selecting a Directive

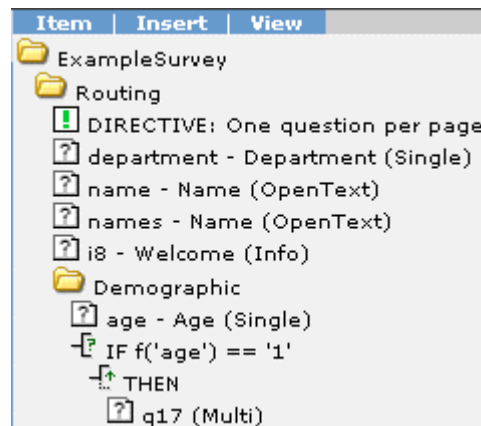


Figure 33: Single Question Directive

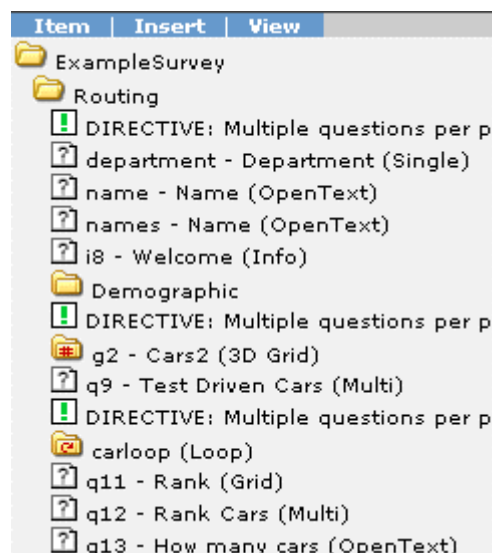


Figure 34: Multiple Questions Directive

5.2.4 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 5.4.

Table 19: Stop node settings

5.2.5 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 6 Confirmit Scripts.)

5.2.6 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).

Loop properties

Loop ID

Field width

Precode mask

Randomize
☐

Deleted
☐

Title

English

Norwegian

Loop members

English	Norwegian	Precode	KeepPos	Active
Volvo				Yes
Saab				Yes
BMW				Yes
Audi				Yes
Ferrari				Yes
Fiat				Yes

Add
Add predefined
Clear
Delete rows
Save

Figure 35: 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 5.2.1.2 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 32 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.
- **Precode mask:** 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 Chapter 6.4 for a description of expressions.
- **Randomized:** When checked, the list of iterations will be randomized. 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 5.5), you can undelete the object by unchecking this flag.
- **Loop members:** A list of loop-iterations, edited the same way as the answer-list in forms. Definition of standard columns:

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 5.2.1.8 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 should only contain alphanumeric characters, with no white space. The maximum length is 32 characters.
KeepPos	Set this property to “yes” if you want an item to keep its position when randomizing the list of iterations.
Active	Defines whether the iteration is active or not. The default setting is Active. For instance, in long-running surveys, you may want to ask the same set of questions once a week, but for different brands/concepts. By adding to the list, and activating/deactivating iterations, you can keep the same questionnaire.

Table 20: Standard loop columns

5.2.7 3D – Grid

A 3D grid is a questionnaire folder object. This object gives you the opportunity to combine various question types into one object with grid layout thus enabling a more compact rendering. The 3D grid allows all the question types to share the same list of answers.

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

To add a 3D grid object to your routing, you drag a 3D grid object from the *New objects* folder:

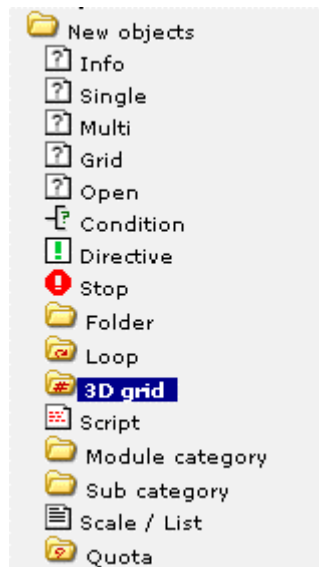


Figure 36: 3D grid object in the New objects folder

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 32 characters.

Precode mask	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 6.4 for a description of expressions.
Randomize	When checked, the list of answers will be randomized. The answer alternatives that have KeepPos property set to Yes, will keep their original position in the list.
Not required	Normally, all questions require an answer if you have checked off the option Answer Required in WI Generator (See Chapter 7.2.1).
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 Chapter 5.5Editing the Routing), you can undelete the object by unchecking this flag.

Table 21: 3D Grid Properties

and drop it in your questionnaire routing, e.g. Cars2 ().

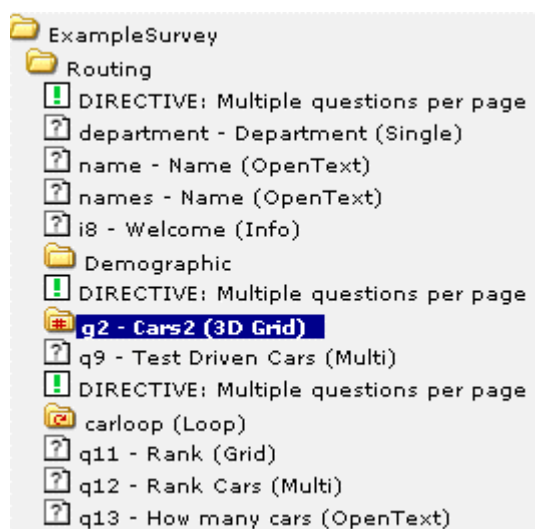


Figure 37: 3D grid in the questionnaire routing

Once you have added a 3D grid object to your routing, you can edit it by double-clicking it, or right clicking it and choosing *Edit* 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 Chapter 5.2.1.

Now you can drag questions from the *New objects* folder and drop them into the 3D grid. Remember that **if you want the object to end up *inside* the folder, hold the <ALT>-key down before dropping. The object will appear as the first object in the folder. You can also hold the object you are dragging over the folder text until a message (Below) is displayed next to it and then release the mouse button. The object will be dropped into the folder.** The next object you can drop on the first object in the folder.

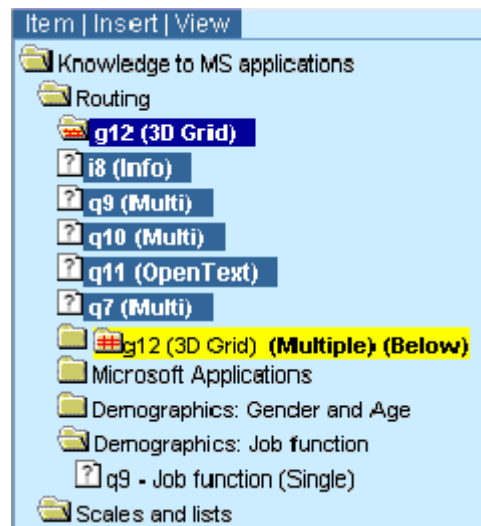


Figure 38: Dropping Items Into a Folder

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, e.g. Which cars have you test-driven?, Which car do you own?, Evaluate the cars** Error! Reference source not found., **has to be entered in the Text field of these questions.**



Figure 39: Multi punch question menu in a 3D grid

However you can add *Scale* to the Grid element in the 3D grid.



Figure 40: Grid question menu in a 3D grid

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 41: A 3D grid object in a survey

5.3 Quotas

Within a survey, quotas are used to predefine the number of responses you would like 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 conditional expressions, while it remains open for other respondents belonging to other quotas that have not been filled up.

Confirmit allows full quota control based on both demographical or attitudinal questions. Quota control can also be achieved on compound quotas, i.e. quotas consisting or built on 2 or more variables. Confirmit may also inform you by mail warning about quotas being completed.

Example:

- You have a pop up survey running, and you know that mostly young people visit the site (your estimate: 5% 40 years or older). However, you are interested in opinions from 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 respondents ($2000 \times 5\% = 100$). But if you only need e.g. 200 responses from the young ones, you can avoid receiving “too many” responses by setting quotas, closing the survey for the young ones after 200, and just letting the others in until their quota is filled up as well.

5.3.1.1 Defining quotas and quota forms

The questionnaire author from within the Questionnaire tree defines quotas. Quotas are created by following these steps:

1. Drop a *Quota* object from the *New objects* folder into the *Quotas* folder.

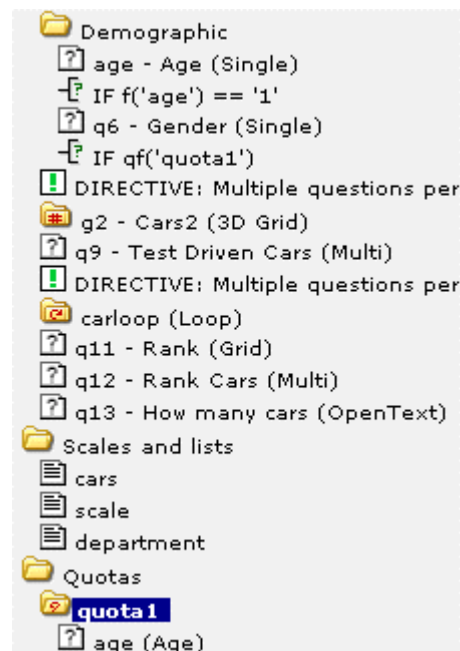


Figure 42: Adding quotas to a survey

2. Drop the questions that are relevant for the quota into the new quota folder. Only single punch, multi punch and grid questions can be used for quotas. **Forms from within loops cannot be used for quotas. Although possible, it is not customary to use multi punch and grid questions as quotas.**

5.3.1.2 Defining quota counters

Once a quota is defined in the questionnaire tree, the actual quota limits with corresponding quota counters have to be defined. **You have to recompile the database before you can edit the quota details.**

Initially a quota contains no counters. The counters are defined by adding a combination of precodes from zero or more of the forms within the quota. You double-click on the quota folder or right click on it and choose *Edit* from the menu, in order to edit quota counters.

If you click the *Add all* button, all answer alternatives will be added for quota editing, or all possible combinations for compound quotas. E.g. in Figure 43: Quota details for a single punch question, all age groups would be added for quota editing.

The screenshot shows a web interface for editing quota details. At the top, it says 'Current database: test' and 'p0107973'. Below this is a blue header 'Quota 'quota 1''. The form contains fields for 'Quota name' (quota1) and 'Quota full email' (ual@firmglobal.com). There are buttons for 'Save' and 'Update counters'. Below these is a table with columns 'Age', 'Quota limit', 'Quota count', and 'Email'. The 'Age' column has a dropdown menu open, showing options: '[Any]', '15-24', '25-34', '35-44' (highlighted), '45-54', '55-64', and '65 and older'. There is an 'Add' button next to the table. At the bottom, there is a link 'Switch to prod database'.

Figure 43: Quota details for a single punch question

If you wish to define a quota limit only on one or several of the variables, you highlight it and click the *Add* button.

The screenshot shows the same web interface as Figure 43, but with the 'Add all' button highlighted. The 'Age' dropdown menu is now closed, and the '25-34' age group is selected in the table. The 'Quota limit' column shows '100', 'Quota count' shows '0', and there is a checked checkbox. There is a '[Del quota]' link next to the table. The 'Add all' button is highlighted at the bottom left.

Figure 44: Defining quota limit for one variable

Field	Description
Quota name	Allows to name your quota

Quota full email	The email address of the person you want to receive a message once the quota is full. An email will be sent when one of the categories is full for a quota, specifying which category that has reached its limit, e.g.: Filled up quota counter : age = '1'
Quota limit	Here you specify the quota limit.
Quota count	The number of respondents who currently classify for the quota.
Email	Check here if you wish to receive an email when the particular quota is full.

Table 22: Quota details

Figure 39 shows how a quota counter definition may look for the Age quota. The interpretation of this quota is:

- Not more than 100 respondents in the age group 25 - 34 should answer the survey.

If a **multi punch question** is used for a quota, there will be one field for each answer alternative. These answer alternatives will be valid for multi questions:

- 'Chosen', which corresponds to values '1' and upwards in the database, i.e. number of respondents who have chosen the variable.
- If you choose 'Any', the quota will not be applied to that variable.

Current database: test p0107973

Quota 'quota2'

Quota name

Quota full email

Volvo	Saab	BMW	Audi	Ferrari	Fiat	Quota limit	Quota count	Email
[Any]	[Any]	Chosen	[Any]	[Any]	[Any]	100	0	☒ [Del quota]

[Switch to prod database](#)

Figure 45: Quota details for a multi question

Figure 45: Quota details for a multi question , shows that variable BMW has been quota limited to 100. **We would advise you to make a separate Quota for each variable in a multi question, in case you wish to set a limit for several of the variables, because the system will evaluate the function qf("quotaname") to true once one of the quota counters has been filled up.**

If a **grid question** is used for a quota, there will be one field for each answer alternative like in a multi punch question, with the scale as a dropdown for each of them. Again you have a choice between adding all the variables for quota defining and specifying only some of the variables.

Current database: test p0107973

Quota 'quota3'

Quota name:

Quota full email:

Speed Safety Sunroof Color Quota limit Quota count Email

[Any] [Any] [Any] [Any] [Any] [Any]

[Any] Poor1 2 3 4 Excellent5

Figure 46: Quota details for a grid question

Current database: test p0107973

Quota 'quota3'

Quota name:

Quota full email:

Speed Safety Sunroof Color Quota limit Quota count Email

[Any] Excellent 5 [Any] [Any] 100 0 ☒ [Del quota]

[Any] [Any] [Any] [Any] [Any] [Any]

Figure 47: Quota details for a grid question 2

Figure 47: Quota details for a grid question 2 , shows that variable Safety has been chosen for quotas. The Safety quota will be counted as full after 100 respondents have rated Safety as 5.

We would advise you to make a separate Quota for each variable in a grid question, in case you wish to set a limit for several of the variables, because the system will evaluate the function `qf("quotaname")` to true once one of the quota counters has been filled up.

5.3.1.3 Compilation of quotas

Once quotas with all quota limits are defined, the quotas are compiled to the SQL database (interview environment) during the compilation of the survey. During this compilation all quota counters are calculated based on completed interviews if the quota counter has not been compiled before.

Once a quota counter is compiled to the interview environment, the interview engine only updates the quota counter when new interviews are completed.

If you add a quota after a survey has started running, you will have to press Update counters button in order to register the respondents qualifying for the quota sample, but who have answered the survey before the quota was added.

5.3.1.4 Changing quota limits

Once the quota is compiled, any changes to the quota limits will be updated directly to the interview environment. It is not necessary to recompile the survey in order to update the quota limits. It is enough to click on the “Update counters” button. If some interviews are removed from the database manually, it may be necessary to recalculate all the quotas. Selecting Update counters from the quota details screen can do this.

5.3.1.5 Updating quota counters during interviewing

When an interview is completed the first time, quota counters are incremented by 1. Only counters satisfying the answers are incremented. If a respondent re-enters an already completed interview, the quota counter is not modified.

In the single punch question quota example above, the counter for respondents in the age group 25 - 34 will be incremented if a respondent in this age group completes an interview.

5.3.1.6 Checking quotas during interviewing

All quota-checking needs to be programmed into the interview as indicated in the Questionnaire tree above, see Figure 42: Adding quotas to a survey. The function `qf(“quotaname”)` returns true if the specified quota is full for this respondent's answers to the quota questions, i.e. the quota this respondent belongs to.

5.3.1.7 Respondent info for full quotas.

As shown in Figure 48: Quota Condition you will have to either stop the survey for the respondents qualifying for an already full quota, or reroute them to a different group of questions, all depending on your survey.

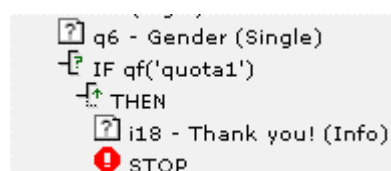


Figure 48: Quota Condition

If you are terminating the survey by adding the STOP node to the THEN branch, the respondents will receive the standard Confirmit message in their survey language: “Thank you very much for your time!” If you wish to present the respondents with a custom message, add an Info object before the STOP node and enter your end text, e.g. “Thank you for your cooperation, but we have gathered enough responses from the target group you belong to.....”.

5.3.1.8 Deleting Quotas

In order to delete a quota from the database, you highlight the quota, press *Delete*, and then recompile the database.

5.4 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, hold the <ALT>-key down before dropping. The object will appear as the first object in the folder. You can also hold the object you over the folder text until a message (Below) is displayed next to it and then release the mouse button. The object will be dropped into the folder.** The next object you can drop on the first object in the folder.

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

Table 23: 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. Folders are also used in conjunction with the library (see 5.10 Confirmit Library).

5.5 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 tree* from the menu.

5.5.1 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 yellow drag-object will appear to the right of the mouse-pointer, giving you an indication of what you are dragging.
- At this point, releasing the mouse-button will drop your object on the object that is beneath the mouse-pointer. This destination object is always **red**.
- 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, use the arrow-keys or PgUp/PgDown-keys 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*”-folder.
- Dropping an object on top of another usually means to move the object to the position *behind* the destination object. If you drop an object on a folder-type object, it will end up *behind* the folder, not *inside*. **If you want the object to end up *inside* the folder, hold the <ALT>-key down before dropping. The object will end up as the first object in the folder. You can also hold the object over the folder text until a message (Below) is displayed next to it and then release the mouse button. The object will be dropped into the folder.**

NB: If you should wish to change default form IDs, please read carefully the Question ID section in Table 9, 5.2.1.5 Properties.

5.5.2 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 select an object, and choosing *Duplicate* from the *Item* menu, or right click on the object and choose *Duplicate* from the menu.

5.5.3 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 <ALT> and <CTRL> button to move inside or duplicate as described in 5.5.1 Moving an Object. You can also hold the objects over the folder, with the mouse pointing at the folder text, until a message **(Multiple) (Below)** is displayed next to it and then release the mouse button. The objects will be dropped into the folder. The message Multiple specifies that you are moving several objects.

5.5.4 Deleting Objects

To delete one or more objects, select them, and press <DEL>, or you can right click on the objects 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 checking *Show deleted nodes* from the details-view of the top folder in the routing-tree (The root-folder with the name of the project. Double click to access details-view, or right click and choose *Edit* from the menu), and refreshing the tree. All deleted objects will appear as

grayed-out in the routing-tree. Access the *Properties* page for the deleted object you want to recover (see 5.2.1.5 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.

5.5.5 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.
- If you drag too many objects, the drag-operation will fail with an error-message.
- After dropping an object, there will be a delay because of the round-trip to the server.

5.6 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.

5.7 Grid View

NB! Grid View requires Internet Explorer 5.0, 5.5 or 6.6.

The Grid View functionality allows the user 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. The user can edit the properties in the page and save the changes there.

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

5.7.1 The Grid View Configuration Page

To enter the Grid View configuration page, the user has to 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: the user 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

The user highlights an object in the questionnaire, and from the Item menu selects Grid View. The user can also right click on an object in the questionnaire and then choose *Grid View* from the menu.

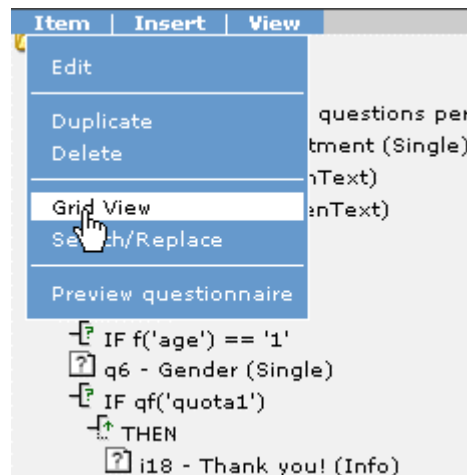


Figure 49: Choosing Grid View from Item Menu

The Grid View configuration page will be displayed.

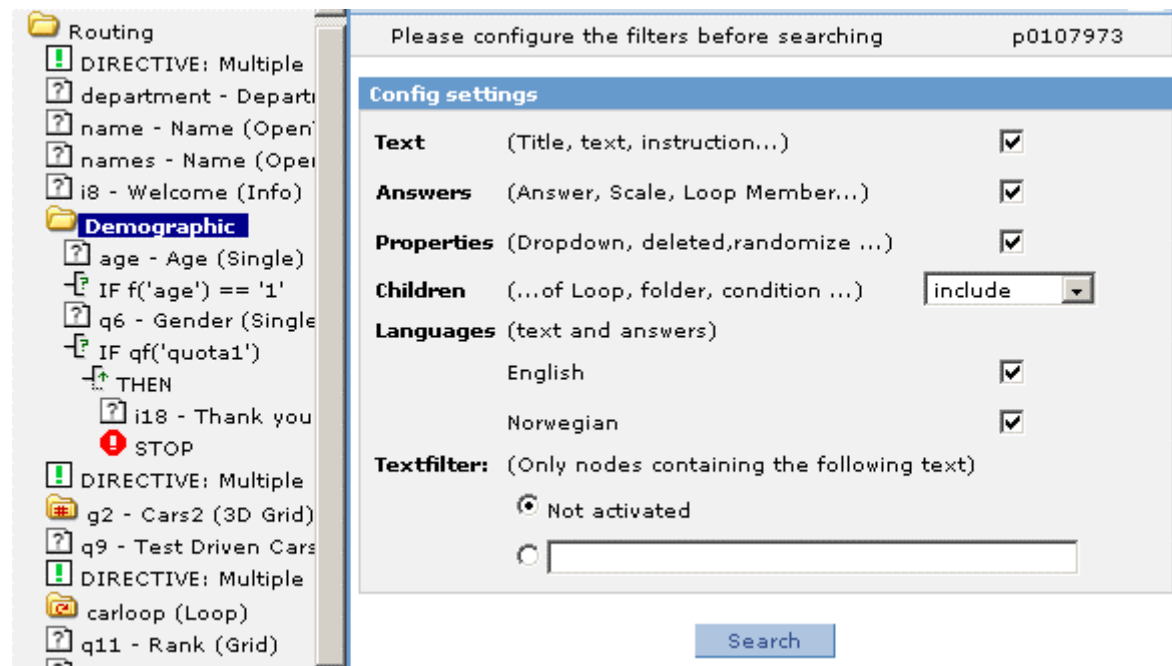


Figure 50: Grid View Configuration Page

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 24: Grid View Configuration Settings

5.7.2 The Grid View Page

5.7.2.1 The Grid View of a Single Node

If the user chooses 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
Gender	Specify:	
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 51: Grid View for a Single Question

As Figure 46 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	Clicking this button will save the changes made by the user 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 25: Grid View Settings



Figure 52: 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 Info node with all properties and project languages chosen in the Grid View configuration settings:

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

PROPERTIES
Deleted ☐

Figure 53: Info 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:

	Title	Text	Instruction
en	How many cars		
no			

PROPERTIES
Validation code

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

Figure 54: 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 Rangering	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 55: 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	2			
3	3	3	3			
4	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 56: Scales/Lists Grid View

Any changes the user makes 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 57: 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 58: 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 59: Folder Grid View

5.7.2.2 The Grid View of Project and Routing Folders

If the project is quite long, and the user highlights the project title folder, chooses all properties in the Grid View configuration settings, also to *include* children setting, the Grid View will be displayed with a following warning message on top:

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

Figure 60: 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 55.

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.

NB! Server Customers will themselves be able to specify the maximum number of nodes to show in the registry settings!

5.7.2.3 Using the Text Filter Setting

If the user wants to edit nodes containing specific text, he/she may activate the Textfilter setting in Grid View Configuration settings, and enter that specific text in the text field.

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

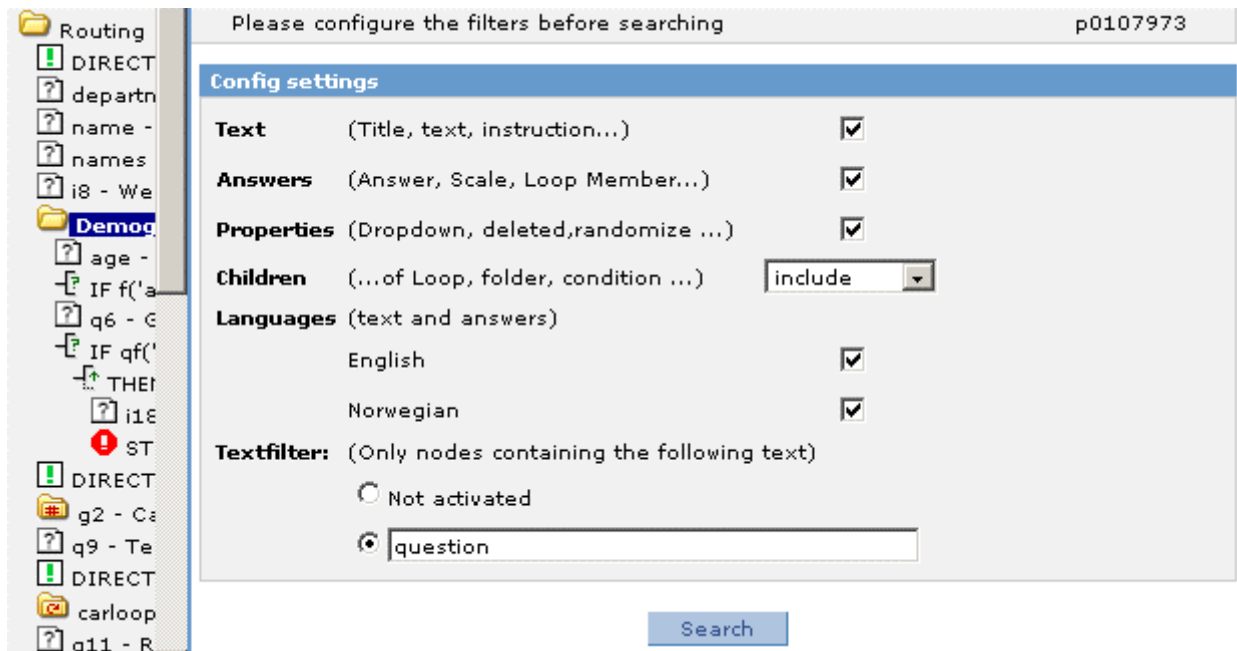


Figure 61: Textfilter Activated

5.8 Search/Replace

NB! Search/Replace requires Internet Explorer 5.0, 5.5 or 6.0.

Search/Replace functionality is a part of the Grid View functionality. It allows the user 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. The user 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.

5.8.1 The Grid View Configuration Page for Search/Replace

To enter the Grid View configuration page, the user has to highlight an object in the questionnaire, or a Scale/List. The Search/Replace can be used:

- On the whole project by highlighting the project title folder: the user 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

The user highlights an object in the questionnaire, and from the Item menu selects Search/Replace. The user can also right click on an object in the questionnaire and then choose *Search/Replace* from the menu.

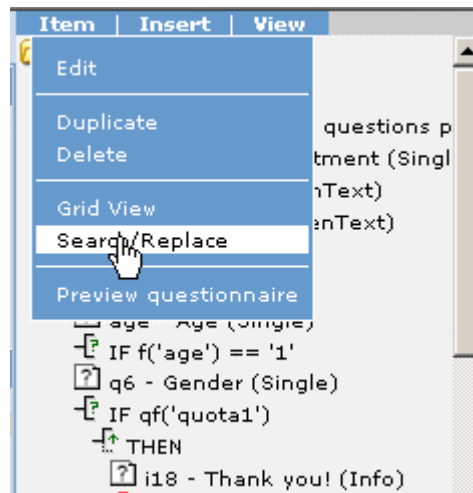


Figure 62: Choosing Search/Replace from Item Menu

The Grid View configuration page will be displayed.



Figure 63: 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 26: Grid View Configuration Settings for Search/Replace

5.8.2 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”:

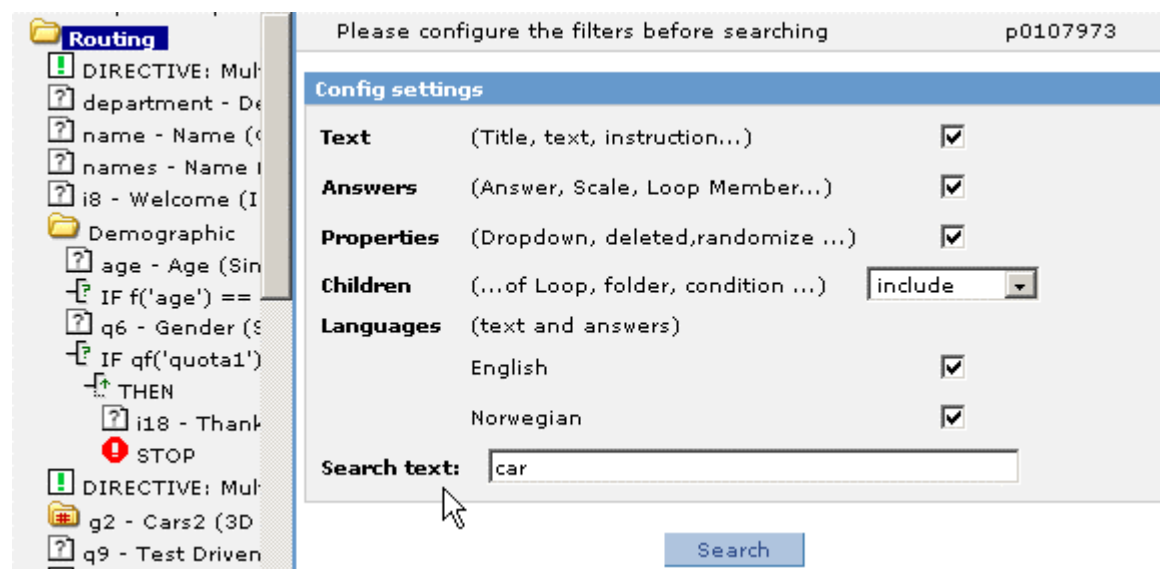


Figure 64: Defining Search in Configuration Settings

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

Figure 65: Search/Replace Grid View

Figure 60 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 59 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	Clicking this button will bring the user back to the configuration settings page allowing performing of a new search on the same node.
Next	The next occurrence of the search text will be highlighted.
Back	The highlighting will be moved back to the previous occurrence of the search text.
Replace	Clicking this button will replace the current occurrence of the search text with the text specified in the Replace text field.
Replace All	Clicking this button will replace all occurrences of the search text with the text specified in the Replace text field.
Search text field	The search text the user specified in the configuration settings will be displayed here.
Replace text field	The user has to specify the text with which he/she wants to replace the search text.
Find in tree	Clicking this button will highlight the particular node in the questionnaire tree.
Hide tree	Clicking this button will hide the questionnaire tree, and the Search/Replace Grid View will be expanded.

Save	Clicking this button will save the changes made by the user in the Search/Replace Grid View.

Table 27: Search/Replace Settings

5.9 Spell Checker

NB! 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.

5.9.1 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.

5.9.2 Using Spell Checker

To check a question for errors, the user has to double click the question in the questionnaire tree, and then choose Spell check from the Item menu.

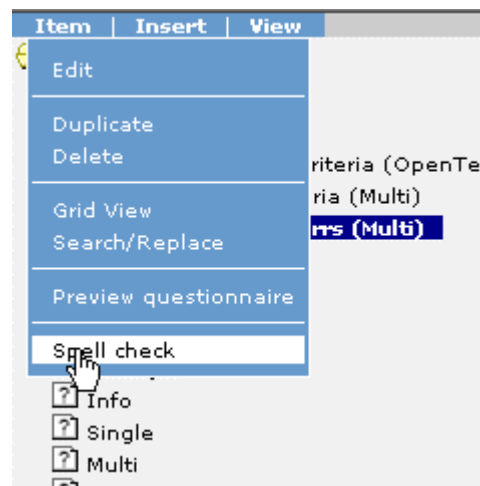


Figure 66: Choosing Spell Check

When the user has chosen Spell check, the following screen will be displayed.

Spell checker

Check spelling for the current language; English p0000277

q4 - Teest Driven Carrs

Title

Text

Whiech cars have you teest driven?

Instruction

Answers:

Volvo	BMW
Ferrari	Saab
Audi	Fiat

☐ English ☐ Norwegian

Check Spelling

Save

Settings

Figure 67: Administration Window for Spell Check

All text fields of the question will be displayed. Figure 62 features a Multi question. Note that by default the first project language will be displayed in the Spell check administration window. If the user wants to check spelling for all project languages (NB! Chapter 5.9.1 Supported Languages), he/she may click the radio button of the next language, and the text for that language will be displayed at once in the Administration window.

Spell checker

Check spelling for the current language; Norwegianp0000277

q4 - Bileer

Title

Bileer

Text

Hvilke biler har du prøvekjørt?

Instruction

Answers:

Volvo

Ferrari

Audi

BMW

Saab

Fiat

☐ English

☒ Norwegian

Check Spelling

Save

Settings

Figure 68: Administration Window for Spell Check – Norwegian

When the user clicks the button *Settings*, the Settings window will be displayed with the default settings chosen:

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

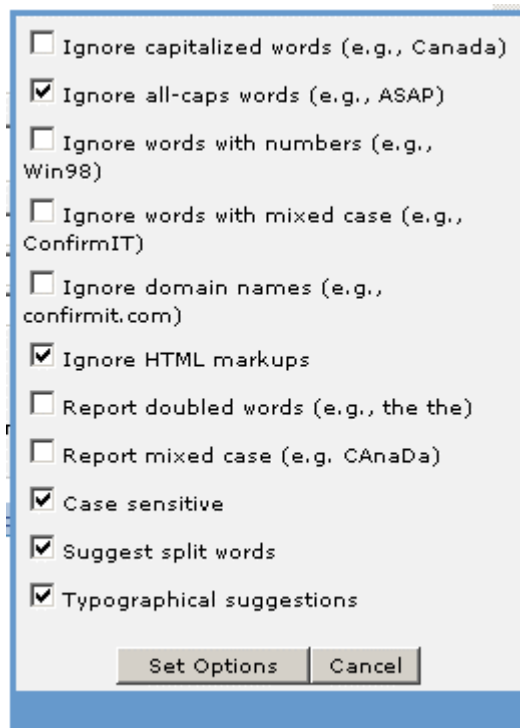


Figure 69: Settings Window

In the Settings window the user can choose criteria he/she wants the Spell Checker to use when searching for misspellings. To save the selected settings, the user has to click Set Options button: the settings will be saved and the Settings window will close.

When the user clicks the button *Check Spelling*, the *Spell Checker* window will be displayed. This window can be moved around by holding the mouse in the upper part of the window.

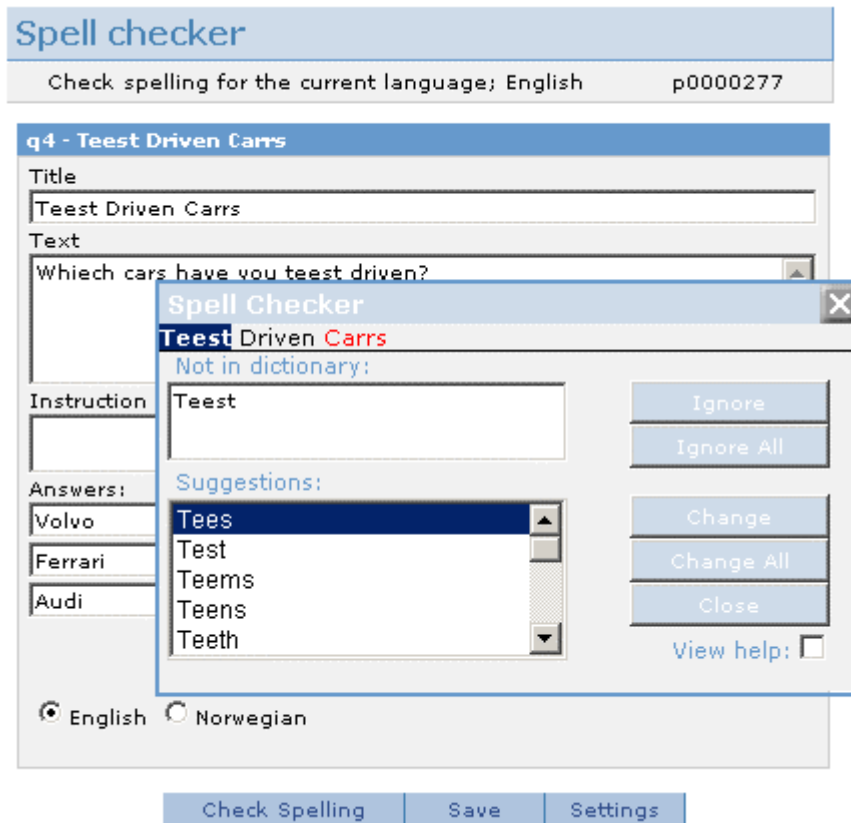


Figure 70: Spell Checker

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 28: Spell Checker Settings

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

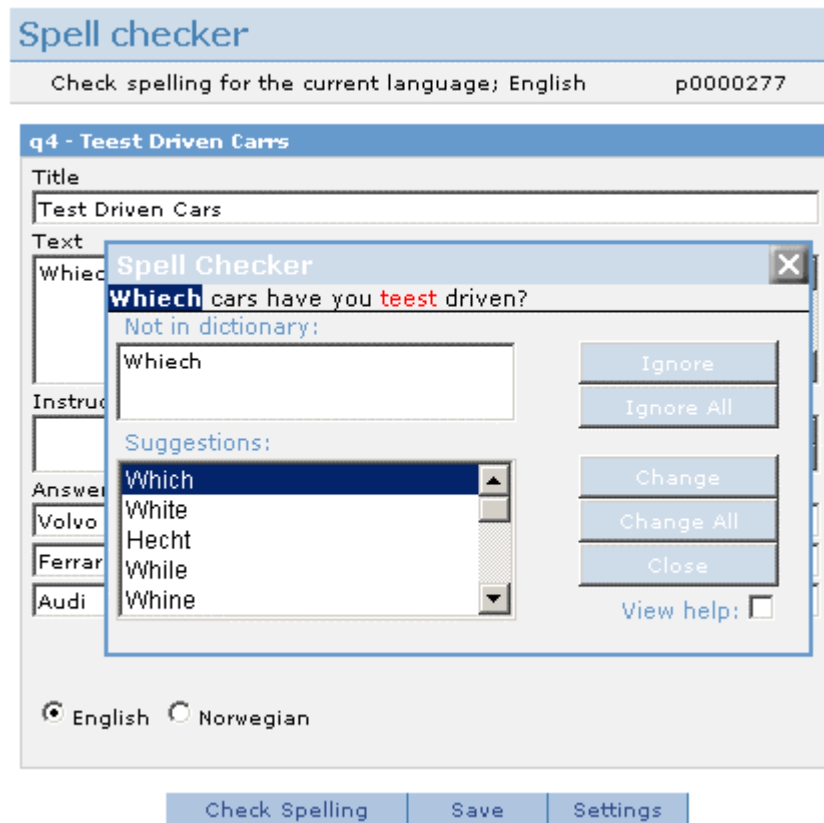


Figure 71: Several Misspellings in a Text Field

When the user has chosen the correct spelling suggested by the Spell Checker and clicked *Change* button, the Spell Checker will highlight the next misspelling.



Figure 72: Next Misspelling

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

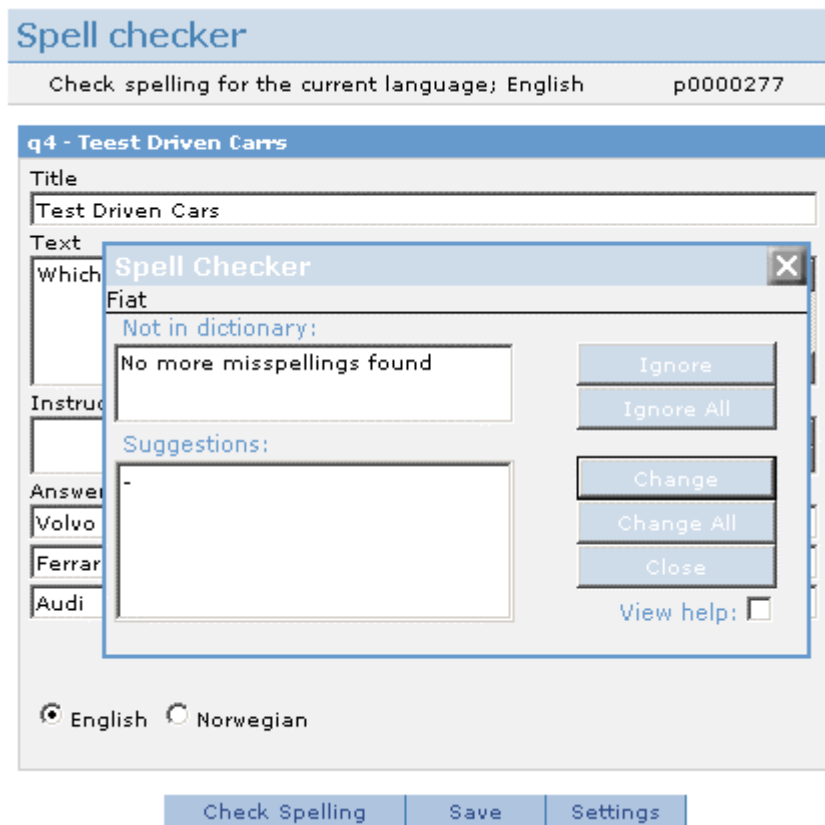


Figure 73: No More Misspellings

The user 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, the user has to click *Save* button in order 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 the user checks the View help check box, the Spell check help will be displayed.

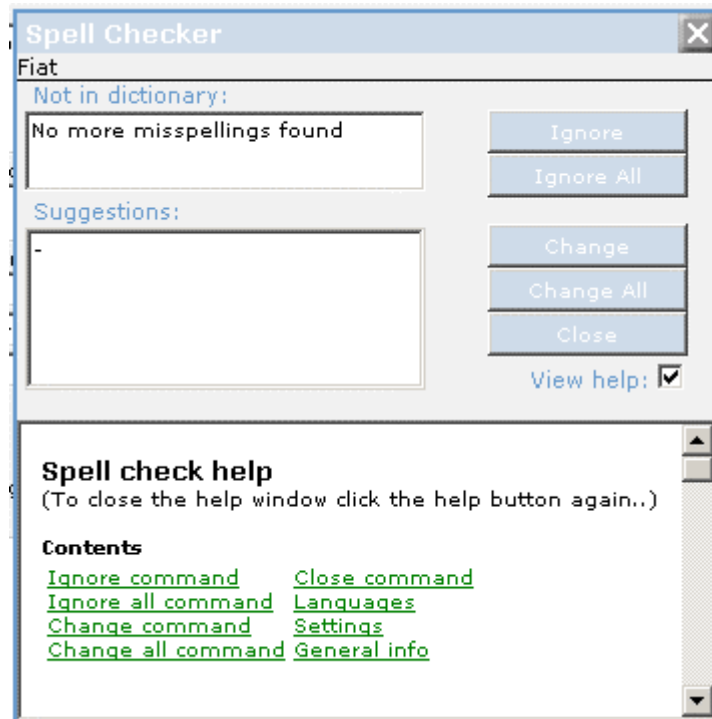


Figure 74: Spell Check Help

5.10 Confirmit Library

The Confirmit Library makes it easy to store and reuse previously created questions and entire questionnaires. All items are stored in hierarchical folder format. Folders and sub-folders may be created to group like library items or questionnaires as needed. Library items may be shared with other Confirmit users in your organization, allowing for efficient project creation.

5.10.1 Opening the Library Environment

To open the Library:

- 1) Start a new project or open an existing project.
- 2) Select Questionnaire.

To open the Library:

- 1) Select the View menu option.
- 2) Select Library.

A frame beneath the questionnaire is displayed.

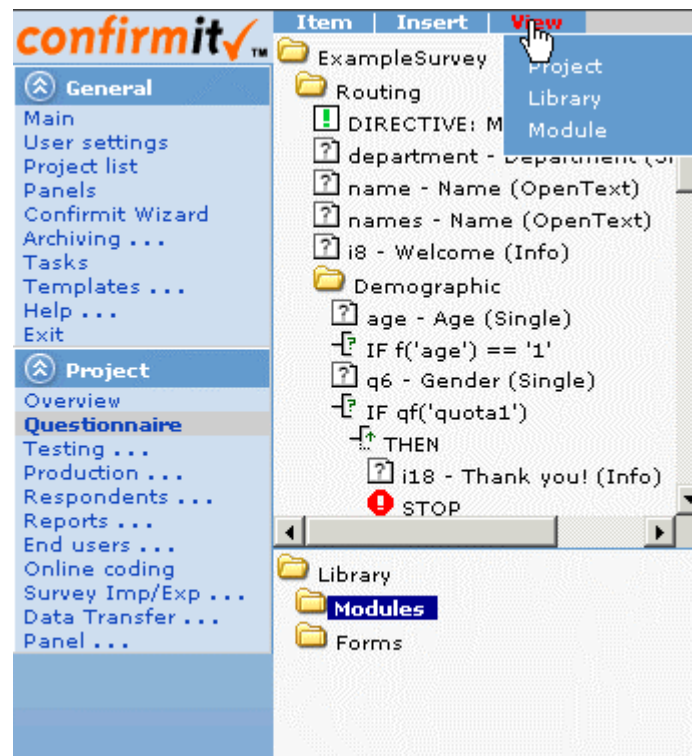


Figure 75: Accessing Library

5.10.2 Creating and Naming Module Categories

Library modules are designed to support a hierarchical folder structure, within which library category folders may be created. The Modules folder is a high-level, application specific folder that contains Module Category folders. Module category folders contain Module Category Sub-Folders. Module category sub-folders contain either question items or questionnaire templates.

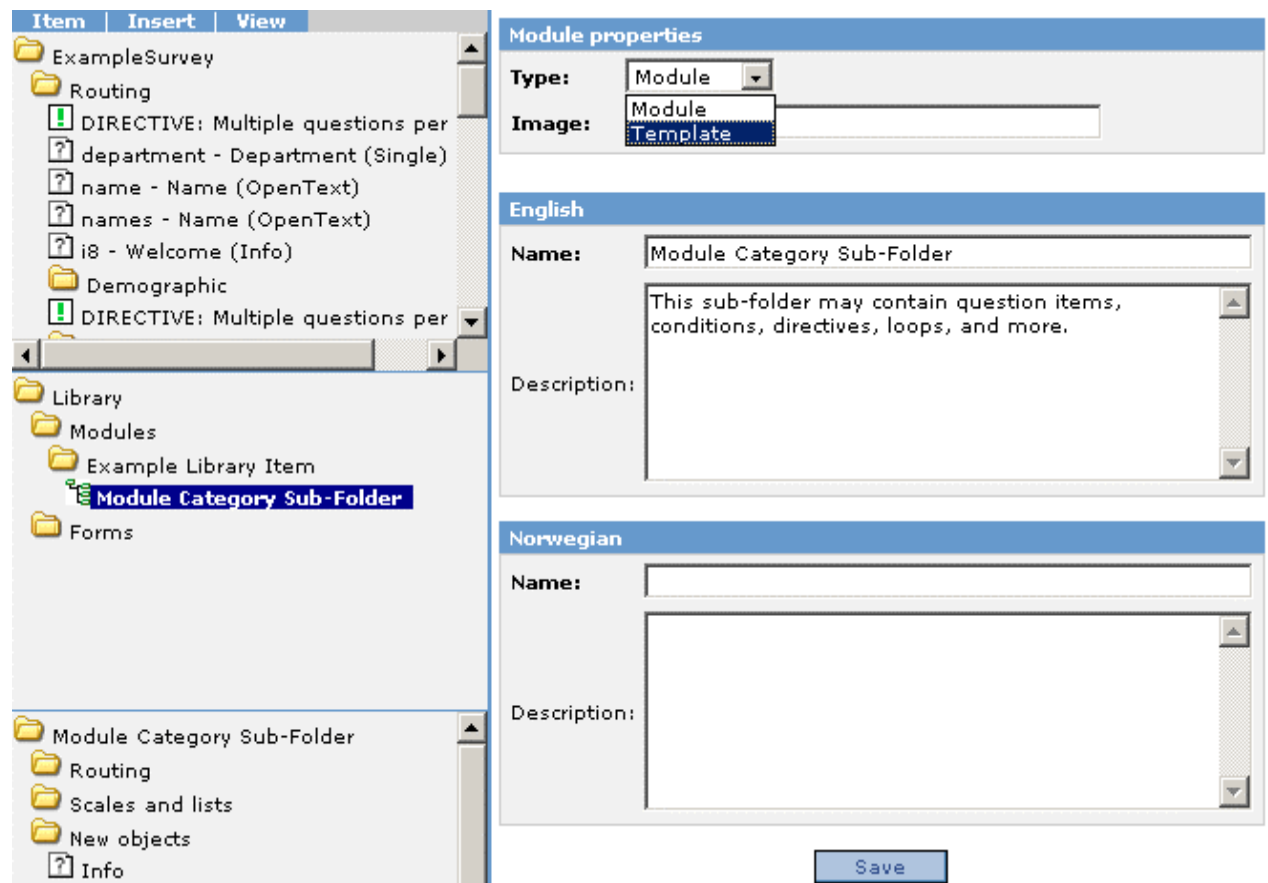


Figure 76: Module properties

To create a Module Category Folder:

1) From the New Objects folder, drag and drop a Module Category Folder into the Modules folder in Library.

The Module Category Folder is displayed.

2) Double-click the Module Category Folder.

The English (folder properties window) displays to the right in a new frame.

Name and Save the folder.

To create a Module Category Sub-Folder:

1) Make sure the Module Category Folder is selected.

2) Select the Insert menu option.

3) Select Module.

The Module Category Sub-Folder is displayed as 'Blank'.

4) Double-click the Module Category Sub-Folder (Blank).

The Module frame, a third frame that resembles the Questionnaire structure, is displayed below.

5) Select the folder Type:

To store question items in the folder, select Module (default).

To store a question template in the folder, select Template.

6) Name and Save the folder.

Field	Description
Type	In this field you can choose whether you wish the question/questions/questionnaire in the module to be saved only as a module in the library, or also as a template in the <i>Main menu > Initiate a new project</i> . See 5.10.5 Templates in Library.
Image	In this field you can refer to an image that will appear as an icon on the <i>Initiate a new project</i> page next to the title of the template. You simply enter the URL of the image.
Name	In this field you enter the name of the folder, which will also be the title of the module.
Description	You can enter a more detailed description of the module.

Table 29: Module properties

5.10.3 Adding Questions or Questionnaires to the Module Category Sub-Folder

To add a question item to the folder:

- 1) For new questions, drag and drop a new question item into the Module Category Sub-Folder.
Edit text, answers, etc.
- 2) For existing questions, drag and drop the question(s) from the questionnaire routing folder.
- 3) For questionnaire templates, drag and drop multiple items into the folder as needed.

5.10.4 Inserting Library Items into New Projects

To insert library items:

- 1) Create a new project or open an existing questionnaire.
- 2) Select Questionnaire.
The routing structure is displayed
- 3) Select View -> Library.
The Library frame appears.
- 4) Double-click the folder containing the library items.
The Module frame appears.
- 5) Drag and drop the library item(s) from the library environment upwards into the questionnaire routing folder.
The library items are copied into the project.
The existing library items remain in the library.

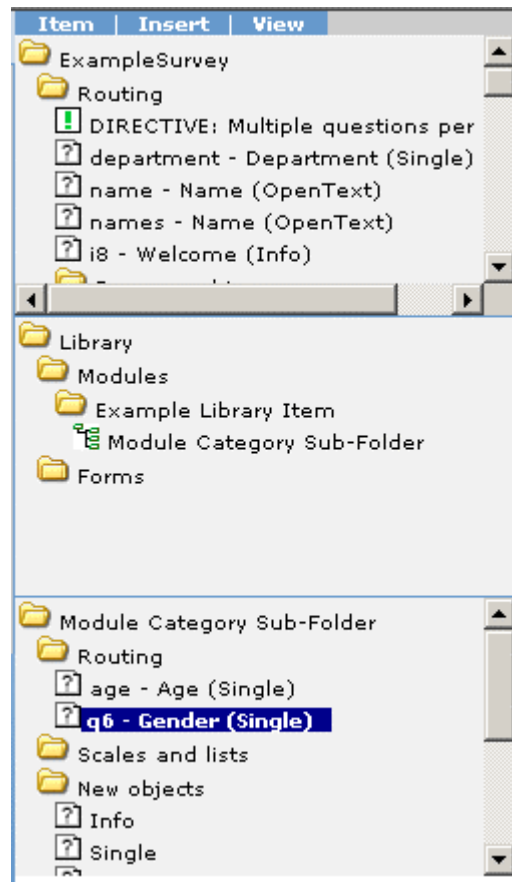


Figure 77: Adding Items to the Library

5.10.5 Templates in Library

To initiate a project using a template:

- 1) Recall that when creating a new library item, the item may be stored as a module or as a template.
- 2) If you store a module as a template, it will be accessible through the Library and as a link on the Initiate New Project page.
- 3) When selecting a template from the Initiate New Project page, you will be brought straight to the Questionnaire builder containing the questions from the template you chose.

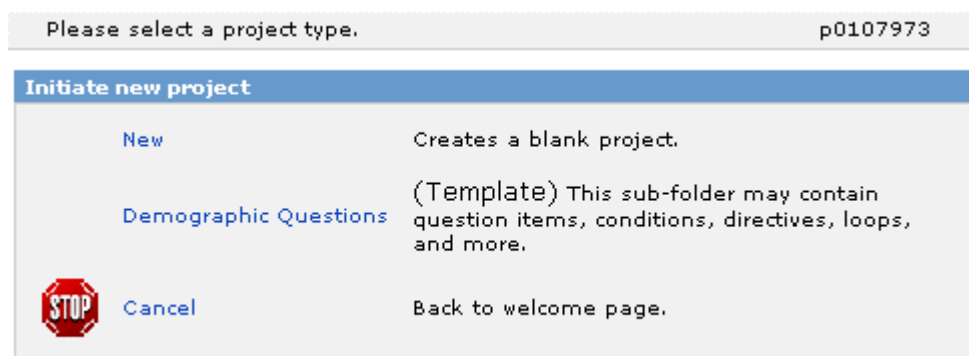


Figure 78: Templates in Initiate New Project

Select a project from your favorites, or search for projects below p0109092

☐	Name	ID	Company	Creator	Created	Closed
☐	Example Survey	p0011200	UserManual	Manual, User	24-May-02 1:33:50 PM	
☐	Example Survey	p0011586	UserManual	Manual, User	24-May-02 1:36:24 PM	
☐	ExampleSurvey	p0107973	UserManual	Manual, User	29-May-02 5:07:04 PM	
☐	Initial Survey	p0107900	UserManual	Manual, User	29-May-02 5:49:18 PM	
☐	Demographic Questions	p0109092	UserManual	Manual, User	29-May-02 8:00:21 PM	

Search projects

Figure 79: A Project Created from a Library Template

5.11 Survey Import/Export Through XML

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.

To **export** a questionnaire:

- Activate survey (select from project list).
- Click *Survey Imp/Exp*, then *Export*.

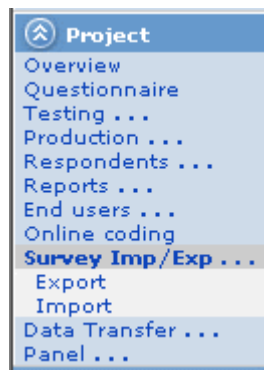


Figure 80: Entering Survey Import/Export

When clicking *Export*, you will be brought to the following screen:

Export properties

Project ID p0107973

Project Name p0107973

Recipient email usermanual@firmglobal.com

Comment

Start time ASAP

OK

Figure 81: Survey Export

- Set export properties (or go with default settings), then *Submit request*. You can either schedule the export for asap execution or schedule it for later execution.

Users will receive the exported questionnaire as an attachment to an email.

To **import** a questionnaire from your computer:

- Click *Survey Imp/Exp*, then *Import*.

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

p0107973

Import properties

Browse...

OK

Figure 82: Survey Import

- Click *Browse*, and then select the local XML file on your computer.
- Then click *OK*.

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

Comment: The import/export only concerns questionnaire and report definitions, and not response data. To import or export response data, see Chapter 16.

6 Confirmit Scripts

6.1 Introduction

Most questionnaires contain some amount of script code. Scripts are used:

- In conditions for controlling the flow through the questionnaire (skipping logic),
- For filtering the lists displayed in questions and the iterations in loops based on previous answers (precode 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 JScript¹ scripting engine to evaluate all questionnaire expressions and to execute scripts. 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.

JScript is an interpreted programming language, which means that the code will only be checked at run-time. So when you use scripts you should always test your questionnaires thoroughly before going "live".

This chapter describes briefly how to refer to and manipulate survey variables.

NB! The functions used here are not described in detail. They are described in the context they are used most often, (e.g. `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.

For a more thorough reference manual to scripting in Confirmit, see Confirmit Scripting Manual where the functions are described in detail.

For documentation on JScript, consult <http://msdn.microsoft.com/scripting/jscript/default.htm>

6.2 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.

¹ JScript is Microsoft's adaptation of ECMAScript, a computer language standard based on several originating implementations, most notably Netscape Communication's Javascript and JScript itself.

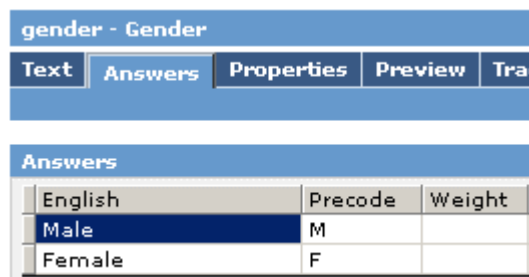
6.2.1 f("qID")

Its basic syntax is `f("qID")`, where `qID` is the question ID specified in Properties (see 5.2.1.5 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 or OpenText checked (see 5.2.1.5 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 30: Values returned from `f("qID")` for different question types

6.2.1.1 Single



gender - Gender		
Text	Answers	Properties Preview Track
Answers		
	Precode	Weight
English		
Male	M	
Female	F	

Figure 83: Answer list of single question "gender"

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

6.2.1.2 Open Text

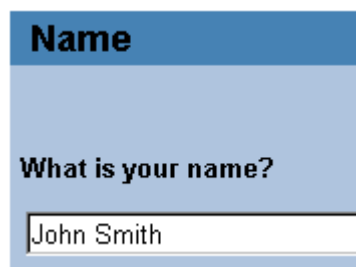


Figure 84: Open Text question "name"

`f("name")` will return `John Smith`

6.2.1.3 Multi

q7 - TV channels

Text **Answers** Properties Preview Tracking Languages Save

English	Precode	Weight	ColWidth	BgColor	Punch
ABC	1				
CBS	2				
CNN	3				
FOX	4				
NBC	5				
None of them	99				Single

Add Add predefined Clear Delete rows Save

Figure 85: Answer list of multi question "TVchannels"

If the respondent answers ABC, CNN and NBC, `f("TVchannels")` will return a set containing 1,3,5.

This answer list (and its precodes) will be used in the next examples as well.

6.2.1.4 Multi with OpenText or Ordered Property Checked

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 86: Multi question "rank"

For an ordered multi question the respondent has to provide consecutive answers in the range from 1 to the number of items in the list (3). `f("rank")` will return the precodes of the items answered in the list, 1,3,5.

Favorite program

What is your favorite program on these channels?

ABC

CNN

NBC

Figure 87: 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 checked as well, the respondent will not have to answer the question. If the question is answered like this, `f("program")` will return a set containing 1,5. (The precodes of ABC and NBC are 1 and 5.)

(Notice 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 6.4)

6.2.1.5 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 88: Grid "hours"

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

6.2.1.6 Other, Specify

favorite - Favorite TV Channel							
Text	Answers	Properties	Preview	Tracking	Languages	Save	
Answers							
English	Precode	Weight	ColWidth	BgColor	Punch	KeepPos	Other
ABC	1						
CBS	2						
CNN	3						
FOX	4						
NBC	5						
Other, specify	6						Yes
Don't know	99						
Add	Add predefined	Clear	Delete rows	Save			

Figure 89: 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 90: Single question "favorite"

An Other text box will have "question id"+_"precode"+_other as variable name, here it would be `favorite_6_other`. `f("favorite_6_other")` will return the string `MTV`.

This syntax is useful when you want to include the value entered in the Other text box in answer alternatives in later questions or in loops.

Loop properties

Loop ID

Field width

Precode mask

Randomize
☐

Deleted
☐

Loop members

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

Figure 91: Other, specify in loops

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

6.2.2 f("qID")["precodes"]

Multi and grids group one or more variables in the same form. The answers are stored in consecutive columns in the database (see 5.2.1.5 Properties for an explanation of how they are stored). To get the answer of an item of a Multi or a Grid question, use the precodes of the item you want as identifier: `f("qID")["precodes"]`

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

Table 31: Values returned from f("qID")["precodes"] for different question types

6.2.2.1 Multi

If we use the same example as in 6.2.1.3, 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).

6.2.2.2 Multi with Ordered Property Checked

Using the same example as in 6.2.1.4, 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 (since ABC was ranked as number 2), `f("rank")["3"]` will return 3 (CNN) and `f("rank")["5"]` will return 1 (NBC).

6.2.2.3 Multi with OpenText Property Checked

Using the multi question *program* from 6.2.1.4, `f("program")["1"]` will return *NYPD Blue*, `f("program")["3"]` will return an empty string (since the respondent did not answer anything for CNN) and `f("program")["5"]` will return *Friends*.

6.2.2.4 Grids

See the example in 6.2.1.5, 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 82.

hours - Hours watching						
Text	Answers	Scale	Properties	Preview	Tracking	Language
Answers						
English	Precode	Weight	ColWidth	BgColor	Pur	
Less than 1 hour	1					
1-2 hours	2					
3-5 hours	3					
6-10 hours	4					
More than 10 hours	5					
Add Add predefined Clear Delete rows Save						

Figure 92: Scale of grid "hours"

6.2.3 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.

Say we have a loop that iterates through the list of channels in the question *TVchannels* from 6.2.1.3. For each of them, 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, and if he/she gives it a score 4 or 5 he/she is asked to give the reasons for giving that score.

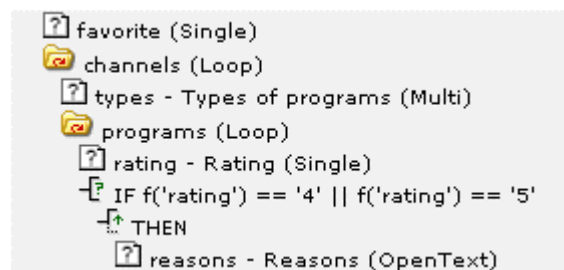


Figure 93: Nested loops

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 wanted the value of *rating* in another iteration, the "precode" of that

iteration would have to be specified. `f("rating", "1")` would be the value of *rating* of "Sit-coms" (see Figure 94: 84).

Loop properties

Loop ID

programs

Title

Field width

Engl

Precode mask

f('types')

Randomize

☐

Deleted

☐

Loop members

English	Precode	KeepPos	Active
Sit-coms			Yes
Soaps			Yes
Talkshows			Yes
Children's Entertainme			Yes
Education			Yes
Sport			Yes
News			Yes
Movies			Yes
Nature			Yes

Add

Add predefined

Clear

Delete rows

Save

Figure 94: The inner loop, "programs"

This expression may be used within both loops. For the outer loop the current value for "channels" will be used. But you may specify the iteration of the outer loop as well (Outside the loops you would have too!). `f("rating", "1", "5")` would give the rating of NBC's "Sit-coms" (see Figure 95: The outer loop, "channels"). Notice the order: The innermost loop first. Outside the loops an expression like `f("rating")` would not make much sense.

Loop properties

Loop ID

Field width

Precode mask

Randomize
☐

Deleted
☐

Loop members

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

Add
Add predefined
Clear
Delete rows
Save

Figure 95: The outer loop, "channels"

Inside the loops you may refer to the current iteration with the syntax `f("loopID")`, e.g. `f("channels")` or `f("programs")`. The value returned will be the precode of the current iteration.

6.3Conditions

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 32: Jscript logical operators

6.3.1 .inc()

As described in 6.2.1, `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.

6.3.2 .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.

6.3.3 .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.

6.4 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 5.2.1.5) or in the loop construct (see 5.2.6) 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 5.2.1.5) 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 6.2.1.3 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 6.2.1.4 and 6.2.1.5 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:

6.4.1 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.

6.4.2 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.

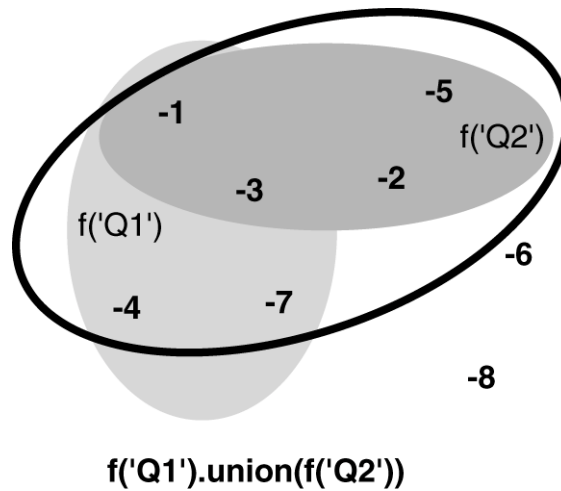
`nset(n)` returns a set populated with the members 1, 2, 3,...,n. `nset(3)` gives the same as the previous example, a set consisting of the precodes 1,2 and 3.

`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.

6.4.3 .union()

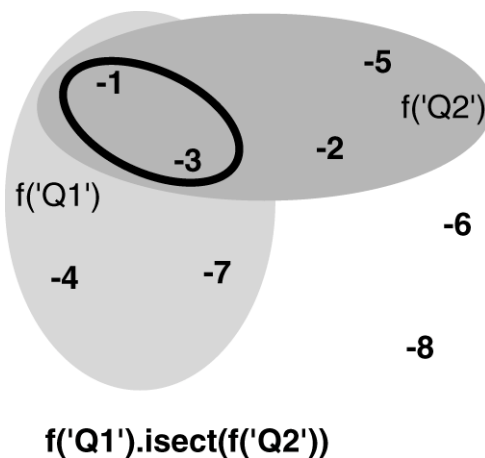
`f('Q1').union(f('Q2'))` returns a new set that is the union of `f('Q1')` and `f('Q2')`, that is a set consisting of all precodes answered to either Q1 or Q2. If you want to add specific precodes to a set in a precode mask, then use `.union()` in combination with `set()`.



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

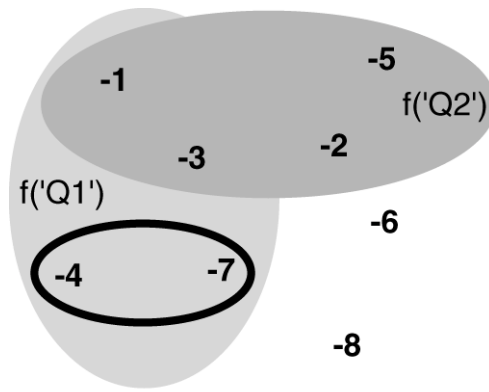
6.4.4 .isect()

`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.



6.4.5 .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()`



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

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

6.4.6 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 5.2) as much as possible when using precode masks, because then you are sure that the precodes are exactly the same in the different questions.

6.5 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 96: "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.

abc -

Text Properties Preview Tracking Languages Save

General properties

Question type Multi

Created May 30, 2002 9:34:42 AM GMT+02:00

Modified May 30, 2002 9:37:53 AM GMT+02:00

Question ID abc

Columns 4

Numeric ☒

Precision 3 (2) **Scale** 1 (0)

Lower limit >= 0 **Upper limit** <= 24

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

Figure 97: 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 98: The "Time spent" question

6.6 Text Substitution/Response Piping

In order to retrieve text or values from a question and insert it in the question wording of another question, you may use caret (^) in front of and after a Jscript expression. This can be used in all text

fields, i.e. Title, Text, Instruction and Answer list/scale. But never in script nodes, conditions, precode masks or validation code fields.

Example:

In the *TVchannels* question from 6.2.1.3 `^f("name")^` is inserted in the text field. This is referring to the *name* question of 6.2.1.2.

Figure 99: TVchannels

When displayed to the respondent, the question will look like this (of course provided that the respondent answered "John Smith" to the *name* question):

Figure 100: "TVchannels" question with text substitution

Question type	Returned from <code>^f("qID")^</code>
Open text	The text answered in the text box.
Single	The text from the answer list corresponding to the precode returned from <code>f("qID")</code> in the current language.
Multi	The text(s) from the answer list corresponding to the precode(s) returned from <code>f("qID")</code> in the

	current language. If more than one, the answer will be separated by comma and with "and" (in the current language) between the last two items.
Other property of answer lists	The text answered in the text box. (The question ID is qID_precode_other (see 5.2.1.5))
Loop	The text of the loop member corresponding to the iteration with precode qID in the current language.

Table 33: Texts returned from $f(qID)$ for different question types

Question type	Returned from $f(qID)[precode]$
Multi with OpenText or Ordered property	The text answered in the text box.
Grid	The answer from the scale corresponding to the precode returned from $f(qID)[precode]$ in the current language.

Table 34: Texts returned from $f(qID)[precode]$ for different question types

The same rules will apply to loop questions, but there you may need to specify iteration(s) as well (see 6.2.3).

6.7 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. If not, truncate answers and 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.

6.7.1 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.

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 7.2.1). The system always performs size checks, because failing to do so will cause database errors. A description of each test is provided below:

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 that 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 5.2.1.5).

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, e.g. 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.

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.

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.

6.7.2 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 than can be presented in this document. See Confirmit Scripting Manual.

6.8 Script Nodes

Script nodes typically contain code for

- Internal programming purposes
Example: Say for instance, you have the multi question *Tvchannels* from 6.2.1.3. You want a single question *most* after that one where you ask something like "And which of these channels do you watch most?" If the respondent answers just one in *TVchannels*, you would not want them to get this question. That can be done by adding a condition (see 5.2.2) with the code `f("TVchannels").size() > 1`, and move the single question *most* to the then-branch of the condition. But you would want to have the one channel they answered in *TVchannels* in the data of the *most*. This can be accomplished by making an ELSE-branch to the condition, and add a script node in it.

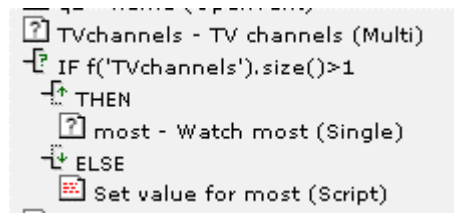


Figure 101: If-then-else construction

The script node should contain this simple code:

```
f("most").set(f("TVchannels")).categories())
```

- Defining functions used in precode masks, conditions, other script nodes or validation code
Example: You have a grid in one question and want the next question only to include the answer alternatives which have been given the highest score, i.e “6” on a scale. You then write a function in a script node:

```
function onlyinclude6(){
    var s = new Set()
    var precodes=f("qID").domainValues();
    for(var i=0; i<precodes.length; ++i)
    {
        var precode=precodes[i];
        if(f("qID")[precode]=="6")
            s.add(precode)
    }
    return s}

```

In the precode mask property of the next question you call this function by using it’s name. In this case `onlyinclude6()`

- Setting the values to hidden variables (see 5.2.1.5)
Example: Instead of asking a respondent which browser they use, you may include a hidden question Browser and set its value by using the `BrowserType()` and `BrowserVersion()` functions in a script node.

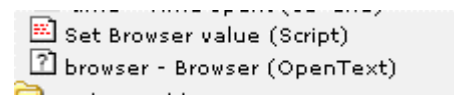


Figure 102: Setting a value for a hidden question

The only code in the `BrowserVersion` script should be:

```
f('Browser').set(BrowserType()+BrowserVersion())
```

6.8.1 Unicode Translator in Script Nodes

Double-clicking the script node will also display the Unicode translator. It converts text from Unicode characters into either HTML code or JavaScript.

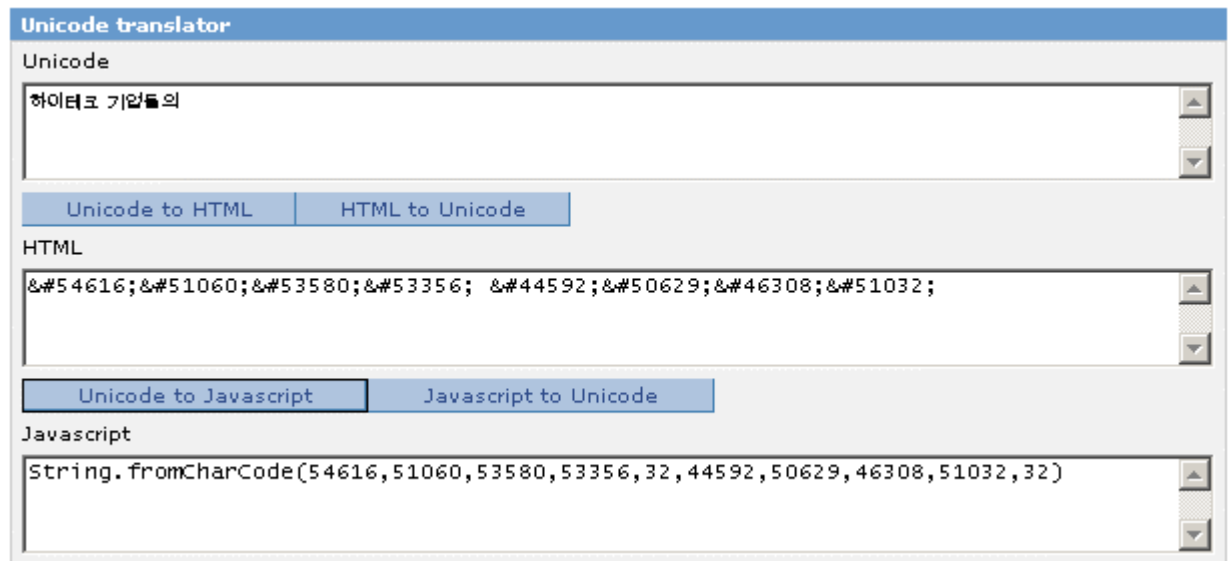


Figure 103: Unicode Translator

You may use the Unicode translator e.g. 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, e.g.:

```
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;! ");
}
```


7 Preparing for Data Collection

In Confrm 6.6, Database- and WI generations will run as batch tasks. This means that if too many requests of this kind are posted at the same time, the system will queue them. Thus, only the ones posting the request will need to wait, instead of today's situation where all users experience slowness as all tasks are run in parallel.

7.1 Generating Response Databases

When you are done with a questionnaire, and you want to test it, you must prepare a response-database for your survey. Every time you make changes in the questionnaire, you have to update the response-database. This process is called compilation.

NB: The system keeps two separate databases for your survey, **one test-database**, and **one production-database**. You generate the test-database from *Testing* → *Compile database*. The production-database is generated from *Production* → *Compile prod. env*.

When clicking “*Compile ...*” for the first time, you will be 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, the system performs some checks to ensure the integrity of the questionnaire. For instance, if you have non-unique form ID's in the questionnaire, the system will stop the compilation with an error message. The system also performs a check on whether the precodes of the Single and Grid questions do not occupy more space than specified in Field Width. (See 5.2.1.5 Properties).

If the database already exists because of a previous compilation, you are presented with a slightly different dropdown dialog.

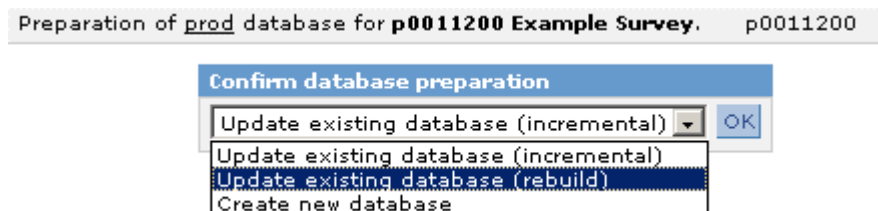


Figure 104: Database Compilation Dropdown

You can choose between:

- Update existing database (incremental) – the system will update only the recently made changes.
- Update existing database (rebuild) – the system will update the whole database. You would e.g. 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.

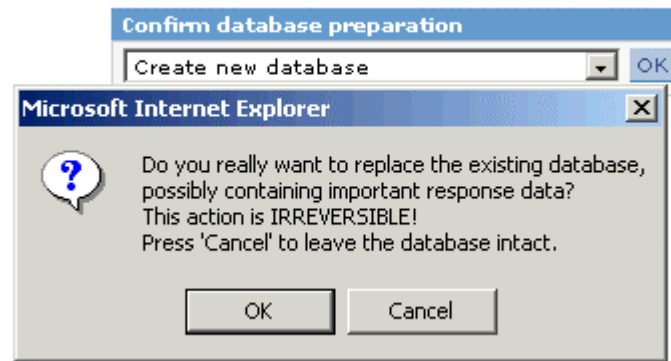


Figure 105: Create New Database Warning.

Most of the time, you should only update the database; this applies especially when you have made changes in a running project. This 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. You should NEVER do this in a running production-database.**

Login only:

To avoid unnecessary storing, FIRM does not guarantee that test databases are saved on the server for more than two weeks.

7.2 Generating Interview Files

Before you can start interviewing, you must have generated a production response database as described above.

7.2.1 Web Interview Files

The web interview generator produces a file capable of

1. Displaying forms for user input over the web,
2. Storing the respondent's answers, and
3. 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://www.yourconfirmitserver.com/wi/pXXXXXXX/i.asp> or
<https://www.yourconfirmitserver.com/wi/pXXXXXXX/i.asp> if you have obtained a SSL secure certificate on your server and choose to run the survey from a secure site.

Where pXXXXXXX is the project number.

Login only: The URL to the survey will always be

<http://survey.confirmit.com/wi/pXXXXXXX/i.asp> or
<https://survey.confirmit.com/wi/pXXXXXXX/i.asp> if you choose to run the survey from a secure site.

Generates web interview files

p0002676

General options

Access existing test interview:

- English

Recipient of error notifications: sermanual@firmglobal.com

Survey design: confirmit default (blue)

☐ Include progress bar
 ☐ Reserve a fixed area for error messages
 ☒ Generate back button
 ☐ Include a link that allows respondent to continue where he left off upon reentry.
 ☒ Allow user to modify answers after initial submission
 ☒ Allow user to modify answers after the interview is complete

Use system's default validation for

- ☒ Answer required checks
- ☒ Exclusivity tests
- ☒ Other-Specify checking
- ☒ Rank order tests

☐ Limited survey (Requires a respondent list)
 ☐ Generate login page (User ID/password must be provided with respondent data)
 ☐ Generate pop-up survey

Advanced WI options

☒ Customize navigation buttons
 Type: Button
 Style:

Button texts

Next
 Back
 OK

en

☐ Cell-area click for grid
 ☐ Label click for single and multi (select by clicking answer text)
 ☐ Auto-next (proceed to next page automatically when possible)

☒ Global button images
 Image URLs
 Radiobuttons
 Checkboxes

Default

MouseOver

Selected

OK

Figure 106: Web Interview Generator options in Test Mode

Once you have generated the survey in Test mode, you can access it again by going through the *Project menu > Test > Generate WI*. 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 will be visible in the Test survey, and will have to be answered (see chapter 8.1.1).

General options	Advanced WI options												
Recipient of error notifications permanual@firmglobal.com	☒ Customize navigation buttons												
Survey design confirmit default (blue)	Type Button												
Default language English	Style Image												
☐ Include progress bar ☐ Reserve a fixed area for error messages ☒ Generate back button ☐ Include a link that allows respondent to continue where he left off upon reentry. ☒ Allow user to modify answers after initial submission ☒ Allow user to modify answers after the interview is complete	Button texts <table border="1"> <thead> <tr> <th></th> <th>Next</th> <th>Back</th> <th>OK</th> </tr> </thead> <tbody> <tr> <td>en</td> <td> </td> <td> </td> <td> </td> </tr> <tr> <td>no</td> <td> </td> <td> </td> <td> </td> </tr> </tbody> </table>		Next	Back	OK	en				no			
	Next	Back	OK										
en													
no													
Use system's default validation for ☒ Answer required checks ☒ Exclusivity tests ☒ Other-Specify checking ☒ Rank order tests	☐ Cell-area click for grid ☐ Label click for single and multi (select by clicking answertext) ☐ Auto-next (proceed to next page automatically when possible)												
☒ Limited survey (Requires a respondent list) ☐ Generate login page (User ID/password must be provided with respondent data) ☐ Generate pop-up survey	☒ Global button images Image URLs <table border="1"> <thead> <tr> <th></th> <th>Radiobuttons</th> <th>Checkboxes</th> </tr> </thead> <tbody> <tr> <td>Default</td> <td> </td> <td> </td> </tr> <tr> <td>MouseOver</td> <td> </td> <td> </td> </tr> <tr> <td>Selected</td> <td> </td> <td> </td> </tr> </tbody> </table>		Radiobuttons	Checkboxes	Default			MouseOver			Selected		
	Radiobuttons	Checkboxes											
Default													
MouseOver													
Selected													

Figure 107: Web Interview Generator in Production Mode

As you may see in the screenshots above, Limited survey flag is activated in the Web Interview Generator in Production Mode. This means that Limited survey option and Generate login page option can only be applied when generating a survey in Production mode. Also the option *Allow user to modify answers after the interview is complete* 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.

7.2.2 Options Controlling Appearance

7.2.2.1 Recipient of Error Notifications

In this field you can enter an email address you wish to receive survey error notifications to.

Whenever there is an error in the survey, the respondent will get a general error message in the language he/she responds to the survey:

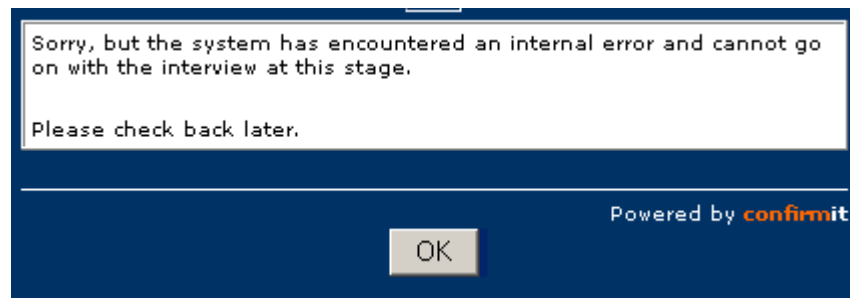


Figure 108: Error Message

The addressee of the email address entered in the WI Generator, on the other hand, will receive a detailed description of the error and its whereabouts, e.g.:

**** 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 erroneous script, precode mask, condition, and etc. expressions. In Test mode, this specified error message will be displayed in the survey, too, next to the general error message.

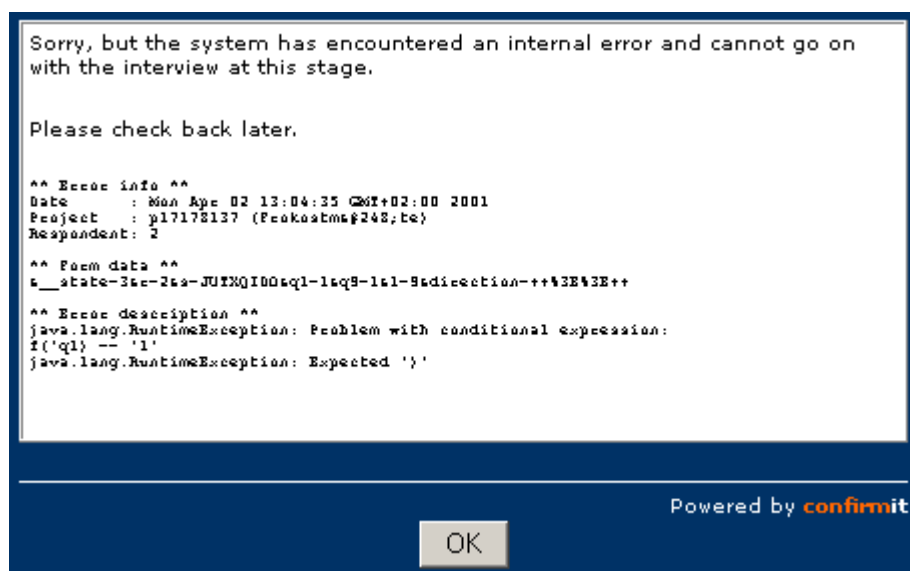


Figure 109: Test Mode Error Message

7.2.2.2 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.

7.2.2.3 Reserve a Fixed Area for Error Messages

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.

7.2.2.4 Survey Design

In this field you may choose among WI templates you have predefined (see 3.8 Templates) and apply them to your project.

7.2.2.5 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.

If no URLs/texts are specified, Conformat will create some defaults if the *Customize navigation buttons* is switched on.

7.2.2.6 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.

7.2.2.7 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.

7.2.2.8 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.

7.2.2.9 Global button images

This feature enables the user to specify three image URLs that will replace the ordinary radio buttons and checkboxes. See also chapter 5.2.1.5.

7.2.3 Options Affecting Interview Behavior

7.2.3.1 Generate 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 user to modify previous answers...* option described below to true.

7.2.3.2 Include a link that allows respondent to continue where he left off upon reentry.

This feature applies to Limited Surveys with the option Generate Back Button selected, and has to be used in combination with the WI Template primitive `^CLINK^` (see Chapter 3.8 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.

7.2.3.3 Allow user to modify answers after initial submission

This option controls the way in which the generated interview handles reentry to a questionnaire page. Reentry 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 email requesting participation in the survey.

If the survey should be “one-shot”, then do not select this option. Then the interview will behave like this:

- 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.

7.2.3.4 Allow user to modify answers after the interview is complete

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.

7.2.3.5 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. See 6.6.1.

7.2.3.6 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. See 6.6.1.

7.2.3.7 Other – Specify Checking

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. See 6.6.1.

7.2.3.8 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 5.2.1.5 Properties). See also 6.7.

7.3 Options for Generating Surveys

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 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.

7.3.1 Options for Generating Limited Surveys

7.3.1.1 Limited 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 e.g. look like this:

<http://survey.confirmit.com/wi/p9999999/i.asp?r=112&s=VDDNCVPK&l=9> or
<https://survey.confirmit.com/wi/p9999999/i.asp?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.

7.3.1.2 Generate 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 8.1 Preparing the Respondent List.

7.3.2 Generating Open Surveys

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, e.g. Web site evaluations.

7.3.2.1 Generate 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.

7.3.2.2 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.yourconfirmitservice.com/wi/pXXXXXXX/i.a
sp", "windowname",
"toolbar=no, location=no, directories=no, status=no, menubar=no, resizable
=yes, copyhistory=no, scrollbars=yes, height=360, width=300")
    }
} </script>
```

Change pXXXXXXX to the actual project number.

The script first checks if the respondent 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

7.3.2.3 Pop-up Script Wizard

In Test mode, after having generated a web interview, you are presented a link, e.g. 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 7.3.2.2, 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 Mar 2003 23:00:00 UTC";
}
```

Figure 110: 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.

7.3.3 Default Language

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.

7.4 Clear Response Data

Clicking on *Clear response data* under *Production* menu will give you the opportunity to delete the response tables in the production database. However, the respondent tables will be retained. This means that if you had tested a project in production mode with 10 respondents, and before you go live, you empty the database by choosing *Clear response data*, the new respondents will get the respondent ids starting with 11. If you also want to delete the respondent tables, you will have to create a new production database.

When you click on the *Clear response data* link, you will be warned that the action is irreversible. If you choose *Cancel*, you will be brought back to the project overview page.

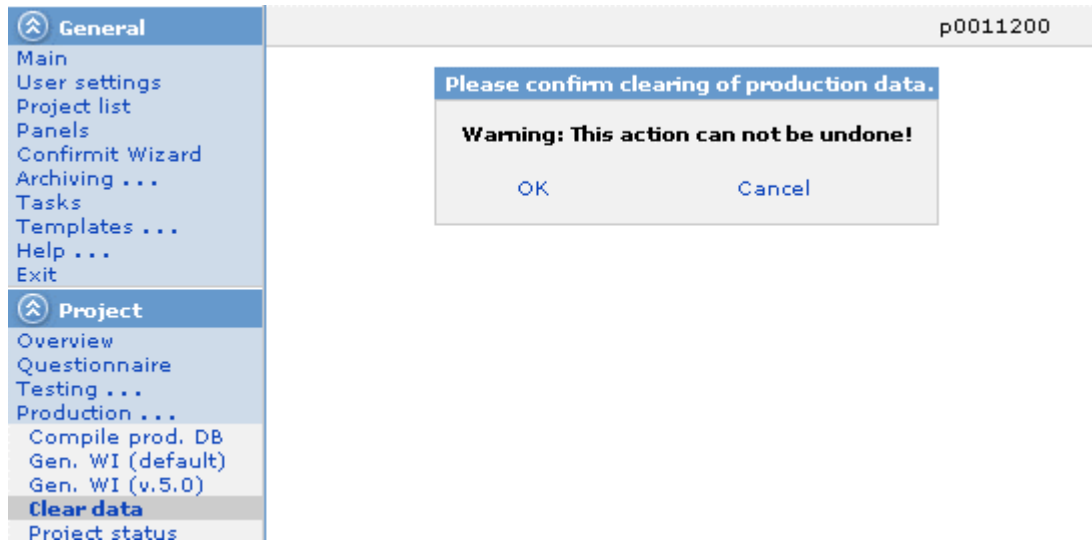


Figure 111: Clear Response Data

If you choose Delete, you will get a message that the response tables were deleted.

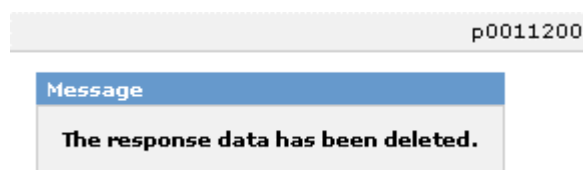
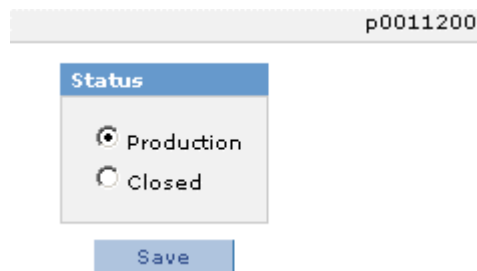


Figure 112: Deleted Response Data

7.5 Project Status

You can set the project status on this page.



p0011200

Status

☒ Production

☐ Closed

Save

Figure 113: 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.

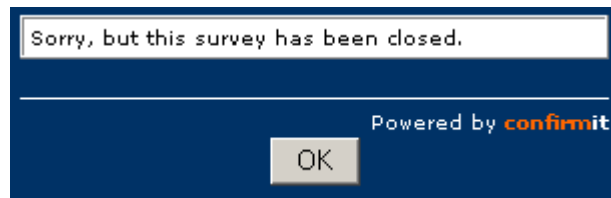


Figure 114: Survey Closed Message

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.

7.6 Project Log

The system records actions executed on a project basis. In *Production > 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 115: Project log

7.7 URL Setup

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

Figure 116: 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 brought 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 35: URL setup

Usually, the End link must be defined before you compile the survey database: *URL Setup > Compile prod env*.

8 Handling Respondents in Limited Surveys

For targeted, non-public web interview surveys, it is necessary to prepare and upload a list of respondents. This chapter describes the necessary steps needed to prepare the respondent list and upload it. Chapter 8.4 also describes how to send e-mails with invitations and reminders for participants of web surveys.

8.1 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 instance 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 is prepared on the user's computer and is 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 36: 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 5.2.1.5 Properties.

8.1.1 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 reporting. However, you will have to include this information in the questionnaire as questions marked as Background variables.

- If the information is unique for each respondent, e.g. 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, e.g. 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, e.g. visited websites, the question type to be included in the questionnaire is Multi question.

E.g. you have the following information about your respondents:

- Email

- Department

With Administration, Marketing, Support, Sales as answers with precodes 1,2,3,4

- Visited websites

With confirmit.com, altavista.com, yahoo.com, lycos.com as answers with precodes 1,2,3,4.

Your respondent list will have the following columns and content:

email	dept	Web_1	Web_2	Web_3	Web_4
somebody@somewhere.com	1	1	1	0	1
somebody@somewhere.com	2	1	0	1	1
somebody@somewhere.com	3	0	0	1	1
somebody@somewhere.com	4	0	1	1	1
somebody@somewhere.com	3	0	1	1	1

The content of the columns must be: the email address for Open questions, the precodes of the variables for Single questions, and 0 (not chosen) or 1 (chosen) for Multi questions.

The question Ids for the background variables must be identical with the column names in the respondent list.

- 1) In the questionnaire add an Open text question, give it ID “email”, and in the Properties choose the option Background var.
- 2) Add a Single question, give it ID “dept”, in the answers enter the department names, and in the precodes enter the precodes, in the Properties choose the option Background var.
- 3) Add a Multi question, give it ID “Web”, in the answers enter the website names, and in the precodes enter the precodes, in the Properties choose the option Background var.

The respondents will not receive these questions. However, 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.

8.2 Uploading the Respondent List

Once the respondent data file has been prepared and saved as a tab delimited text file, it is ready to be uploaded into Confirmit. This is accomplished by selecting the menu *Respondents/Uploading*. You will be brought to the following screen:

Enter the file name to download in the text box below or press **Browse...** to locate it. When you have selected the correct respondent file, press **Upload...** to upload it to confirmit. p0011200

File Upload

File

Browse...

File Encoding

ANSI

ANSI

UTF-8

Unicode

more...

Figure 117: Upload Respondents

In the *File Encoding* dropdown menu choose the correct encoding of your respondent list. Clicking on *more...* will present you with more encoding options. **NB! The respondent list has to be a Tab delimited text document saved in the encoding you will be choosing in Upload Respondents.**

Then press the *Browse...* button, which will invoke the familiar Windows™ File Open dialog, allowing the user to browse through the file system and select the appropriate respondent data file and press the *Open* button in the file dialog.

Once the correct data file has been selected press the *Upload...* button to start uploading the respondent list to the Conformat system. After the file has been successfully uploaded, the user is presented with three options:

- **Yes, append:** This option will append the newly uploaded respondents to any existing respondents already in the database.
- **Yes, overwrite:** This option will delete any existing respondents in the database before adding the newly uploaded respondents. **Use this option with caution.** If you use this option in an ongoing survey, the list of initially uploaded respondents will be deleted, and the respondents will not be able to enter the survey. If any of them has started to answer the survey or has completed the survey, - their responses are registered and saved in separate respondent tables. This will also be reflected in the *WI interv. progress* under *Reporting*: If 130 respondents from the original list have completed the survey, and you have overwritten the list with new e.g. 80 respondents, the WI interview progress will display that the Total number of respondents is 80, and that the number of complete answers is 130.
- **No:** This option will abort uploading respondents and return to the *Project overview* page.

If uploading is confirmed, a status screen will appear after a few seconds, summarizing the number of respondents that were uploaded.

8.3 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.

It is not possible to edit any answers respondents have given to questions in the survey.

8.3.1 Enter/Remove Search Fields

The respondent data editor is found under “Respondents” -> “Editing” in the main menu. The editor page is separated in two frames. The upper frame holds action buttons, search fields and buttons, and fields for adjusting the number of displayed respondents per page. The lower frame is for editing data. The frame size is dynamic and it is possible to drag the split up and down. When entering the page the fields shown in the picture are available if no background data has been uploaded.

The screenshot shows the 'Respondent list' interface. At the top, there are buttons for 'Search', 'Clear', and 'Change view'. To the right are 'Prev 50' and 'Next 50' buttons. Below these are checkboxes for 'Advanced' and 'Update...' and 'Delete...' buttons. On the right side, there are labels for 'Page 0 of 0' and 'Page size' with a dropdown menu set to '50'. The main area is a table with three columns: 'respid', 'noOfEmailsSent', and 'userid'. The table is currently empty, and a message at the bottom states 'No matching respondents found'.

Figure 118: Respondent Data Editor

- Respondent data editor fields

Field	Description
respid	Search field for respid

noOfEmailsSent	Search field for number of emails sent
Page size	Enter number of respondents listed per page

Table 37: Respondent Data Editor Fields

- Respondent data editor buttons

Buttons	Description
Search	Perform search
Clear	Clear the search fields
Change view	Add or remove search fields
Update	To enable update of sets of data
Delete	Delete the selected respondent(s)
Prev 50	Display the previous 50 (50 or selected number in the “Page size” field) respondents listed
Next 50	Display the next 50 (50 or selected number in the “Page size” field) respondents listed

Table 38: Respondent Data Editor Buttons

If background variables have been uploaded, then search field for these are visible as default as well. The next picture shows an example with background variables.

The screenshot shows a web interface titled "Respondent list". At the top, there are buttons for "Search", "Clear", and "Change view". Below these are checkboxes for "Advanced" and "Update...", and a "Delete..." button. On the right side, there are buttons for "Prev 50" and "Next 50", and a section for "Page 0 of 0" and "Page size" with a dropdown menu set to "50". Below the buttons is a table with columns: "respid", "noOfEmailsSent", "userid", "email", "gender", and "department". The "respid" column has a small upward arrow icon. Below the table, it says "No matching respondents found".

Figure 119: Respondent List

To be able to edit any data, a search must have been performed. It is possible to search in more fields than “respid” and “noOfEmailsSent”. To enter other search fields push the “Change view” button. A window pops up where search fields can be selected. See picture below. You can also remove fields in *Change view* window.

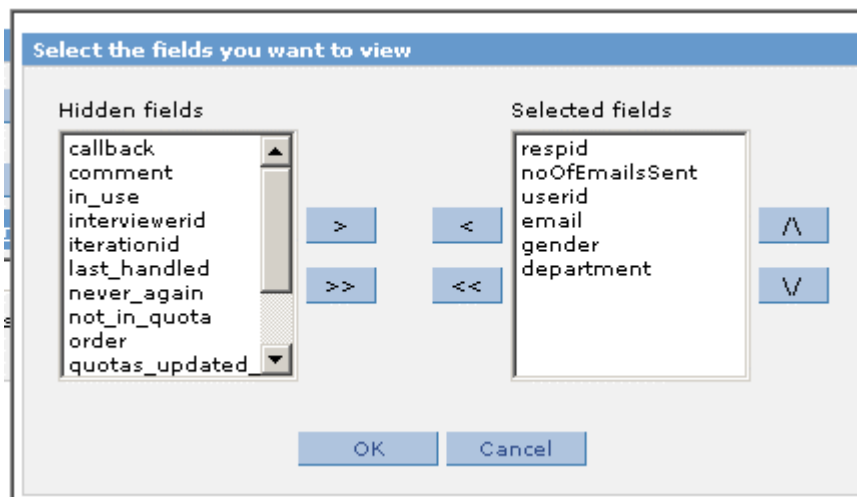


Figure 120: Respondent List Fields

- Change view fields and buttons

Field / Button	Description
Hidden fields	Fields in the respondent table available to use as search fields
Selected fields	Fields selected to use as search fields
>	Moves highlighted field elements from “Hidden fields” to “Selected fields”
<	Moves highlighted field elements from “Selected fields” to “Hidden fields”
>>	Moves all field elements from “Hidden fields” to “Selected fields”
<<	Moves all field elements from “Selected fields” to “Hidden fields”
^	Moves selected field element upwards in the “Selected fields” list
v	Moves selected field element downwards in the “Selected fields” list

Table 39: Change View Fields and Buttons

Highlight the desired fields in the “Hidden fields” list and use the single arrow “>” to move them over to the “Selected fields” list. To move several fields at a time, hold the “Ctrl” button on the keyboard down while clicking each desired field with the mouse. By clicking the double arrow “>>” all the fields are moved over. When using the double arrow button it is not necessary to highlight the fields first. Search fields can be removed from the “Selected fields” list by using the arrows pointing in the other direction.

When the desired fields are moved over to the “Selected fields” list, click the “OK” button. Now all the fields selected will appear as search fields in the main window. In the picture below, “department” has been moved over to “Hidden fields” and now is not an available search field.

Search

Clear

Change view

☐ Advanced

Update...

Delete...

Prev 50

Next 50

Page 0 of 0

Page size

50

respid	noOfEmailsSent	email	gender

No matching respondents found

Search

Clear

Change view

☐ Advanced

Update...

Delete...

Prev 50

Next 50

Page 0 of 0

Page size

50

▲ respid	noOfEmailsSent	userid	email	gender

No matching respondents found

Figure 121: Selected Fields in Respondent List

8.3.2 To Search

To make a search, write information in one or several of the fields and push the “Search” button. The result is listed below the fields. To change the search you may clear the fields by pushing the button “Clear” or just 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 the “Search” button is pushed, 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. In the picture below a search has been made for all male respondents in the database.

Search

Clear

Change view

☐ Advanced

Update...

Delete...

Prev 50

Next 50

Page 1 of 1 (1 - 4 of 4 records)

Page size

50

▲ respid	noOfEmailsSent	userid	email	gender
				m
1	0		john.smith@somewhere.com	Male
2	0		Alex@nowhere.com	Male
3	0		george@here.no	Male
4	0		007@everywhere.co.uk	Male

Figure 122: Making a Search

You can sort the respondents by clicking on the column/search field headings.

8.3.3 Update Data and Delete Respondents

There are two possible ways to edit the respondent data.

1. Update field(s) for one respondent at a time
2. Update sets of fields/data

To update data for one respondent at a time, highlight the row in the list representing the respondent for which you want to edit data. When the row is highlighted, a detailed page of this respondent is displayed in the lower frame with the search fields. See picture below.

The screenshot shows a web interface for managing respondents. At the top is a 'Respondent list' header. Below it are search and navigation controls: 'Search', 'Clear', 'Change view', a search input field containing 'gender LIKE N'm%'' with up/down arrows, 'Prev 50', 'Next 50', 'Page 1 of 1 (1 - 4 of 4 records)', and 'Page size 50'. There are also checkboxes for 'Advanced' and buttons for 'Update...' and 'Delete...'. Below these is a table with columns: 'respid', 'noOfEmailsSent', 'userid', 'email', and 'gender'. The table has two rows: row 1 with values 1, 0, john.smith@somewhere.com, Male; and row 2 with values 2, 0, Alex@nowhere.com, Male. Row 1 is highlighted. Below the table are 'Save' and 'Delete' buttons. Below the buttons is a 'Current respondent' edit form with fields for 'respid' (1), 'noOfEmailsSent' (0), 'userid' (empty), 'email' (john.smith@somewhere.com), and 'gender' (Male). At the bottom of the form are 'Save' and 'Delete' buttons.

Figure 123: Updating Data on Respondents

- Fields in “Current respondent” edit frame

Field	Description
respid	The selected respondent’s respid
The rest of the fields	The fields selected as search fields

Table 40: Fields In Current Respondent Edit Frame

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. A dialogue box appears when the “Delete” button is pushed asking if the user really wants to delete the respondent. Deleted respondents are not possible to retrieve. Please note that the respondent is deleted from the respondent table. If the respondent has answered the survey his or her answers to the questions in the survey are not deleted.

PLEASE 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. Please proceed with caution.

PLEASE NOTE! The buttons "Update..." and "Delete..." at the top of the page update / delete the whole set of data that has been retrieved in the previous search. To delete or update only the selected (highlighted) respondent of 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 push the "Update" button. Now another page is opened in the lower frame. See picture below.

The screenshot shows a web application interface for managing respondents. At the top, there's a 'Respondent list' header. Below it, a search bar contains the query 'email LIKE N'some%' AND gender LIKE N'f%'. To the right of the search bar are buttons for 'Prev 50', 'Next 50', and a 'Page size' dropdown set to 50. Below the search bar are buttons for 'Search', 'Clear', and 'Change view'. A checkbox labeled 'Advanced' is checked. Below these are buttons for 'Update...' and 'Delete...'. Below the search bar is a table with columns: 'respid', 'noOfEmailsSent', 'userid', 'email', and 'gender'. The table has one row with values: 5, 0, , someone@firmglobal.com, and f. Below the table is a dialog box titled 'Update set of respondents'. It contains a text area with the text 'field1 = 'value1', field2 = 'value2', ...'. Below the text area are buttons for 'Update' and 'Clear'.

respid	noOfEmailsSent	userid	email	gender
5	0		someone@firmglobal.com	Female

Update set of respondents

field1 = 'value1',
field2 = 'value2', ...

Update Clear

Figure 124: Updating Sets of Respondent Data

In this update page the users have to manually write the updates, in the form shown in the example over the open text field and push "Update". The picture below shows how the gender and department field are updated to Male and Sales for respondent with respid = 1.

Respondent list

Search Clear Change view

☒ Advanced

Update... Delete...

email LIKE N'some%' AND
gender LIKE N'f%'

Prev 50 Next 50
Page 1 of 1 (1 - 1 of 1
records) Page size 50

respid	noOfEmailsSent	userid	email	gender
5	0		someone@firmglobal.com	Female

Update set of respondents

field1 = 'value1',
field2 = 'value2', ...

gender='Male'
department='Sales'

Update Clear

Figure 125: Updating Sets of Respondent Data

The “Clear” button removes all text written in the search fields.

Please note that even if it says that sets of data are updated, not all respondents with gender = Female and department = Marketing in the database were changed like the respondent with respid = 1 here in this example. Only the respondents selected in the search are updated. There may be several respondents in the list after a search, and if there were more than the one in this example, they would all be changed like this one was. This is why the user has to make a search before it is possible to do any updates.

8.4 Sending E-mail

Confermit provides a powerful wizard for sending e-mails to web survey respondents. On the basis of 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 that have completed a web interview.

The e-mail wizard is accessed through the *Respondents > Emailing* menu. The wizard will take the user through the following steps:

1. **Respondent selection:** Select which respondents should receive the e-mail and specify the content of the e-mail.
2. **Preview and confirmation:** Preview respondents who match the selection criteria.
3. **Sending e-mail:** Send the e-mails to the selected respondents.

More on these steps in the following sections.

8.4.1 Step 1: Respondent Selection

The screenshot shows a 'Setup' window with a blue header bar. The main content area is divided into three sections: 'SELECTION CRITERIA', 'PREVIEW OPTIONS', and 'EMAIL'. Under 'SELECTION CRITERIA', there is a dropdown for 'Respondent status' set to 'Any', and text input fields for 'noOfEmailsSent', 'userid', 'email', 'gender', and 'department'. Under 'PREVIEW OPTIONS', there is a dropdown for 'Max no of preview records' set to '10'. Under 'EMAIL', there is a dropdown for 'Mail format' set to 'MIME encoded', a dropdown for 'Encoding' set to 'Western European (ISO)', a checkbox for 'Send as HTML' which is unchecked, a text input for 'Sender' with the value 'usermanual@firmglobal.com', a text input for 'Subject' with the value 'A Survey!', and a text area for 'Body' containing 'Dear Respondent!' followed by several dots. At the bottom of the 'EMAIL' section, there are two checkboxes: 'Include link' and 'Secure', both of which are checked. A note at the very bottom of the window reads: 'Note: See User Manual section 'Avoiding Unnecessary Respondent Inquiries''.

Setup

SELECTION CRITERIA

Respondent status: Any

noOfEmailsSent:

userid:

email:

gender:

department:

PREVIEW OPTIONS

Max no of preview records: 10

EMAIL

Mail format: MIME encoded

Encoding: Western European (ISO)

Send as HTML: ☐

Sender: usermanual@firmglobal.com

Subject: A Survey!

Body: Dear Respondent!
.....

Include link: ☒

Secure: ☒

Note: See User Manual section 'Avoiding Unnecessary Respondent Inquiries'

Figure 126: E-mail setup

Please note that this screen may vary depending on the column names of the respondent file. All fields will be presented under *selection criteria*.

Note! When sending emails in Unicode languages, please select the appropriate Encoding from the dropdown.

In this step, the user enters the selection criteria that will determine which respondents will receive the e-mail. The criteria are:

Criterion	Description
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.
<i>Other fields:</i> eg “email”	The wizard will display all fields from the respondent file that may be used for selection.
Status	Description
(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 completed it.
Screened	All respondents who have screened status (See 5.2.4 Stop-objects).
Quota full	All respondents who have been stopped due to a full quota. See 5.2.4.

Table 41: Respondent selection criteria/status

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 enter 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 numbers of respondents.

Under the *E-mail* heading the user can enter details about the e-mail he wishes to send to the selected subset of respondents:

Field	Description
Mail format	Choose between sending a MIME encoded (default) or plain text e-mail. Normally MIME will work best on most e-mail programs.
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 <i>From</i> 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 web interview at the bottom of the e-mail (default).
Secure	When checking this, the URLs will use https:// for secure links instead of http://. NB! Server Customers have to obtain and install a SSL Secure Certificate on their servers to enable this option.

Table 42: Email setup fields

8.4.2 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 in the following way:

- ^slink^
- ^secureslink^ for secure links

Make sure 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.

NB! Server Customers have to obtain and install a SSL Secure Certificate on their servers to enable ^secureslink^ option.

8.4.3 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:

Please, read the following before you enter the survey!

- Cut (Copy) – and – Paste the link into the Internet address window in case you cannot access the survey by simply clicking on the link. Make sure it's on one single line and without any spacing.

- 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 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! Please, do not send it to other respondents.

By pressing the *Preview* button, the user is taken to step 2 of the e-mail wizard.

If you are including the unique links to the survey at the bottom of the email message by checking *Include link* flag, make sure that the mouse cursor is at the beginning of a new line. Thus you can prevent that the link to the survey merges with the body of your email message.

8.4.4 Step 2: Preview and Confirmation

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 that is to be sent 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.

8.4.5 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 127: Batch Emailing.

Figure 127: 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. **NB! 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 these.**

Configuration of a batch job. p0107973

Task instance properties

Properties

Log

Property	Value
Task type	 Batch Emailing
Task ID	33213
Schedule	2002-05-30 11:01:24
Status	In queue
Approx % completed	0%
Start time	-
End time	-
Time usage	00:00:00
Assigned server	

Task definition

Figure 128: 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.

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, e.g. 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 *Sender*, *Subject*, *Body*, etc. fields
- 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

Configuration of a batch job.		p0107973
Task definition properties		
Properties	Recurr	Instances
Property	Value	
Task type	 Batch E-mailing	
ID	299	
Owner	user	
Company ID	0	
Project ID	p0107973	
Comment		
Command line	<pre>jview <confirmprogram>\bin\ConfirmMail <taskid></pre>	

Figure 129: Task Definition Properties

- Click *Recurr* flag, and you will be brought to the Recurrence pattern of the batch job

Configuration of a batch job.		p0107973
Recurrence pattern		
Properties	Recurr	Instances
Current settings		
Current settings	Initial start time = 30.05.2002 11:01:23	
Change		

Figure 130: Recurrence Pattern

- Click the *Change* button and set *Recurring task* to Yes, and choose the *Recurrence pattern type* and *Range of recurrence*

Configuration of a batch job.		p0107973
Recurrence pattern		
Properties Recurr Instances		
Current settings		
Current settings	Initial start time = 30.05.2002 11:01:23 Change	
New start time	☐ Disable task (clear queue) ☒ ASAP ☐ 0:00 30 5 2002	
Recurring task	Yes	
Recurrence pattern type	☐ Hourly ☒ Daily ☐ Weekly ☐ Monthly	
Range of recurrence	☒ No end date ☐ End by: 30 12 2002	
Daily schedule	Every 0 day(s) Save	

Figure 131: Choosing Recurring Task

Those who still have not answered the survey will be sent a reminder each time the batch emailing is scheduled according to the Recurrence pattern.

8.5 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.

8.5.1 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 Appendix B: Conformat 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, e.g.:

<http://www.yourconfirmitserver.com/wi/pXXXXXXXX/i.asp?l=9> (for English)

<http://www.yourconfirmitserver.com/wi/pXXXXXXXX/i.asp?l=10> (for Spanish)

etc.

8.5.2 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 8.1 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 8.5.1 Open Multilingual Surveys).
- In multilingual surveys with login-page (see 7.3.1.2) 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.

8.6 Rule Based Send Outs

Rule Based Send Out functionality, as Sampling (see Chapter 9), 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.

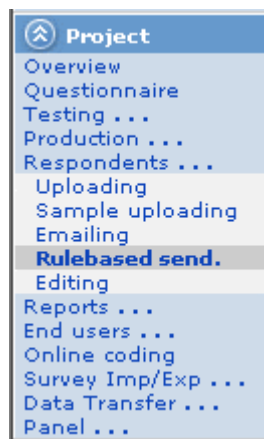


Figure 132: Rule Based Send Out in the Menu

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 133: 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 134: 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 43: Rule List Fields

To create a rule, click on the *New* button. The Rule Editor Wizard will be displayed.

STEP 1 - Build the rule

Name:

Email delay: day(s)

Expression:

Rule builder

Variables	Operators	Values
eggs	=	Boiled [1]
	<>	Fried [2]
	AND	
	OR	
	(	
	)	

Figure 135: Rule Editor Wizard for Rule Based Send Outs

In the questionnaire you can highlight the question on which you want to build the 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.

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. 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 44: Rule Editor Wizard Settings

You can also use Background variables, if it is a regular Limited survey, or Panel Variables, if the survey is linked to a panel, in order to create a rule. Remember to add those variables as questions in the questionnaire (See Chapter 8).

When you have defined the rule, click the *Next* button. The email set-up window will open.

STEP 2 - Email setup

Target project ID p0128104

Mail format MIME encoded

Encoding Western European (ISO)

Send as HTML ☐

Sender usermanual@firmglobal.com

Subject Follow Up

Body Dear Respondent!

Include link ☒

Secure ☒

Cancel < Back Next > Finish

Figure 136: Email Set Up for Rule Based Send Outs

Setting	Description
Target Project ID	Here you enter the project ID number of the target project.
Mail format	Choose between sending a MIME encoded (default) or plain text e-mail. Normally MIME will work best on most e-mail programs.
Encoding	Select the language encoding type.
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 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://.

	NB! Server Customers have to obtain and install a 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 45: 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.

STEP 3 - Schedule setup

Target project p0128104 - Rule Based Target

Load respondents Append

Start time ASAP

Email preview

To kristinem@firmglobal.com
From usermanual@firmglobal.com
Subject Follow Up
Body Dear Respondent!
 https://fi-bugfix03/wi/p0128104/i.asp?
 r=1&s=ABCDEFGH

Cancel < Back Next > Finish

Figure 137: Schedule Set-up

The target survey will be sent to the respondents fulfilling the rule requirements.

9 Panels

NB! For some customers, Panel functionality is a chargeable Add-On.

The Panel functionality enables Project Managers to monitor and handle panels of respondents without leaving the Confirmit application.

Functionality for panels is provided through the following features:

- Creating new panels
- Recruiting panelists for a panel
- Editor for panelists within a panel
- Panelist web page template editor
- Sampling functionality

9.1 Recruiting Panelists

Panelists can be recruited by utilizing the Confirmit survey functionality. This can be done like this:

- Panelist registers his/her Name, e-mail address, etc, User Id and Password by answering a pop-up or clicking a link received by email.

9.2 Creating a Panel

To create a new panel, the project manager has to click on the link *Initiate New Panel* in Confirmit Main menu.

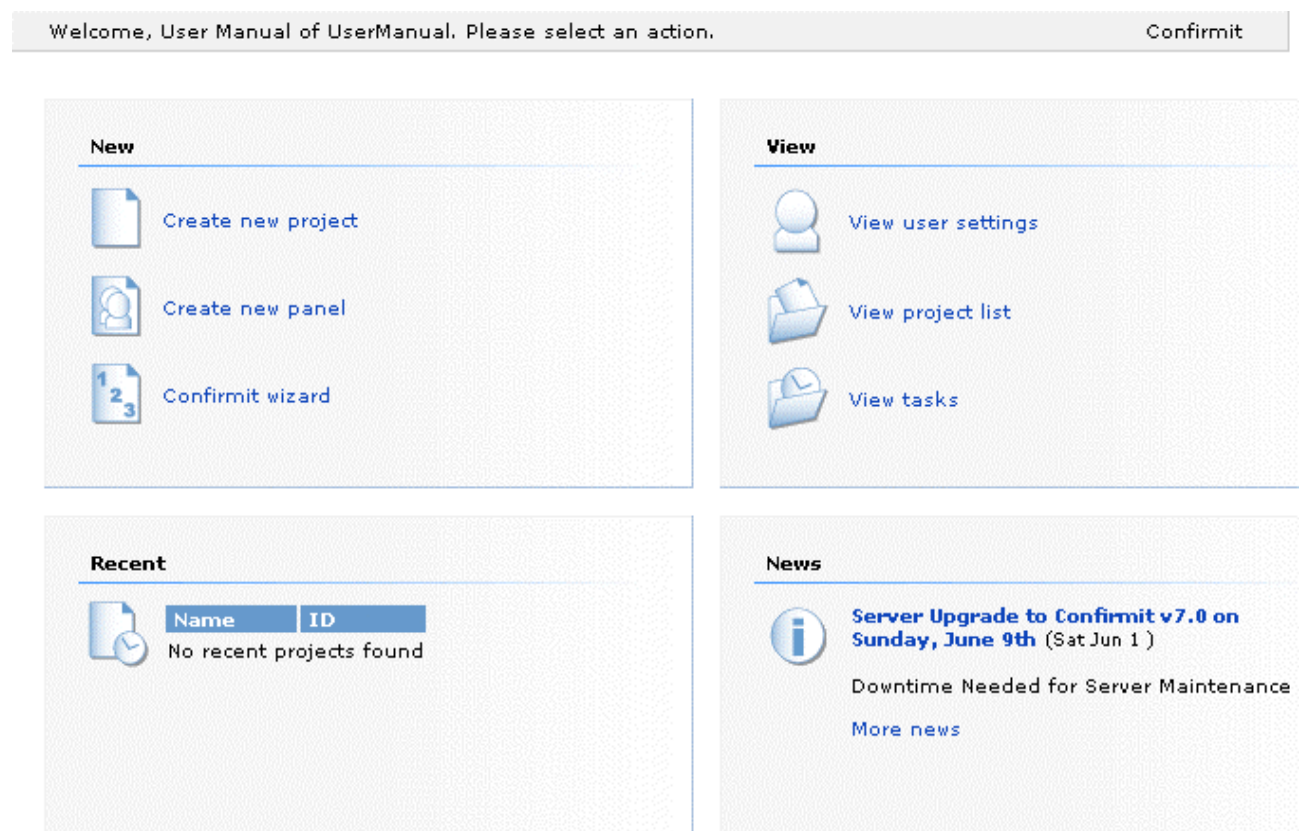


Figure 138: Initiate New Panel in the Main Menu

The project manager will be brought to the following screen:

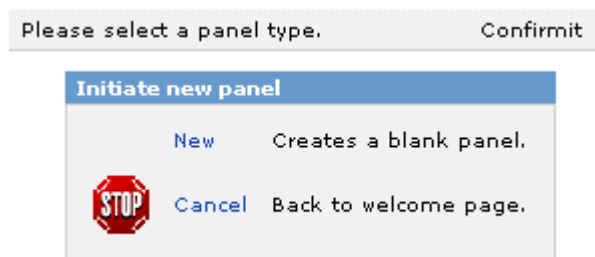


Figure 139: Initiate New Panel

If the user clicks *Cancel*, he/she will be brought back to the Main menu. Whereas, if the user clicks *New*, he/she will be brought to the *Panel list*.

9.3 Panel list

The Panel list is the main panel organizer, as Project list is the main project organizer.

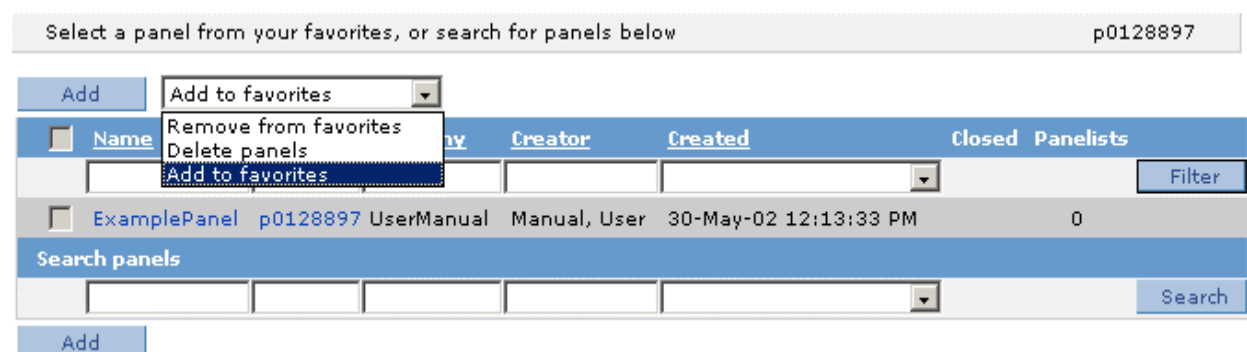


Figure 140: Panel List

It consists of *Favorite panel projects*, i.e. projects you have been working on recently.

The list may be sorted by clicking the header of the column by which you want to sort the projects.

The list may be filtered in a number of ways, by *time* (*created* column) or by *search parameters* (all other columns). You only have to enter the first letters of the criteria on which the search is to be based. The system will return all matches. Example: Specifying “ex” in the *name* column will return all panel projects starting with the letters “ex”.

If you want all projects to be listed, enter a “*” in any column under *search projects*.

You may enter a project directly from this list by clicking the project name or the project ID.

The user can Add, Remove, and Delete several projects at a time. Depending on the action chosen in the dropdown, the name on the button next to the dropdown will change. Only system administrators and users with Delete permissions to a project will be able to delete a project from the project list.

When the list of your Favorite projects contains a considerable number of projects, you may want to remove the ones that you currently do not work on by choosing Remove from favorites from the dropdown, choosing the projects, and clicking the Remove button. **This will not delete the panel projects, but move them from the Favorite list.**

In case you wish to access the removed projects, you can use the *Search projects* fields. All projects the user has been granted access to will be listed according to search criteria. You may move these projects to your Favorite list by choosing the projects and clicking the Add button.

9.4 Creating a New Panel Project

Clicking the *New blank panel* link in the Panel list will bring the project manager to the *Project Overview*.

The screenshot shows a web form titled "Project details" with a blue header. The form contains the following fields and sections:

- Project ID:** p0128897
- Project name:** ExamplePanel
- Company:** UserManual
- Description:** A large text area for entering a detailed description.
- Languages:** A section with two columns: "Available" and "Selected".
 - Available:** A list box containing Afrikaans, Albanian, Arabic, Arabic (Algeria), and Arabic (Bahrain).
 - Selected:** A list box containing English.
 - Between the two list boxes are two arrow buttons: ">>" and "<<".
- Creator:** Manual, User
- Created:** 30-May-02 12:13:33 PM
- Status:**
- Deployment:**

At the bottom of the form is a "Save" button. Below the form are three links: [Object permissions], [Duplicate project], and [Delete project].

Figure 141: Project Overview for Panels

Field	Description
Project ID	System generated unique identification number.
Project name	A title you choose for the panel. 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 panel project.
Languages	Here you can select the working language(s) of your panel project. The <i>Available</i> field contains all the languages that are supported in Confirmit. The <i>Selected</i> field will contain the working languages of your panel. You highlight a language in the <i>Available</i> field and click the arrow button to add it to the <i>Selected</i> field.
Status	Project status.

Deployment	Survey type (Public/Limited/Pop-Up) Web Interview.
Title	Here you can insert a title you want to be displayed for the report end users.

Table 46: Project Overview Settings

The screenshot shows the 'Project Overview Settings' interface. It has two main sections. The first section, 'Project titles', has a blue header with an up arrow icon. Below it, the language is set to 'English' with a dropdown arrow, and there is a text input field. The second section, 'Project info fields', also has a blue header with an up arrow icon. It contains two rows: 'Start date (yyyy-mm-dd)' and 'End date (yyyy-mm-dd)', each with three dropdown menus for year, month, and day, all currently set to '-'. A 'Save' button is located at the bottom right of the second section.

Figure 142: Project Titles and Info Fields

Field	Description
Title	The title of the project, which you want to be displayed for the End Users of reports.
Start date	Info field stating the start date of a survey.
End date	Info field stating the end date of a survey

Table 47: Project Titles and Info Fields

The screenshot shows the 'Administrator Info' interface. It has a blue header with an up arrow icon. Below it is a list of 18 metrics, each on a new line: 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 143: 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 info 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 48: Administrator Info

Figure 144: 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 49: Check Growth Fields

After having edited the Project Overview settings for your panel, click Save to save the changes. Now you can create the questionnaire for recruiting the panelists. Click the *Questionnaire* Link in the *Project* menu, and the questionnaire builder frame will be displayed with the default questionnaire for panels in the routing, as shown in the picture below:

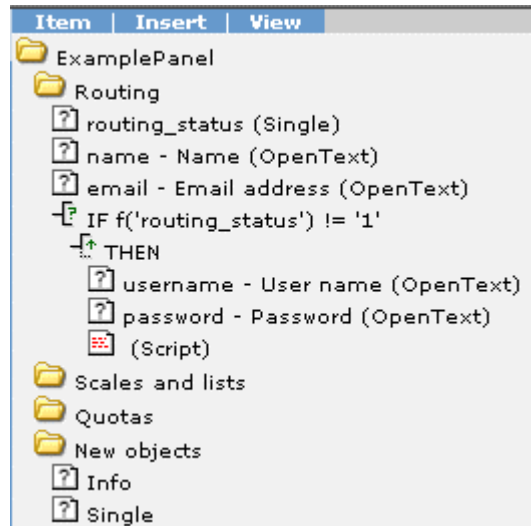


Figure 145: Panel Questionnaire

The default objects cannot be removed from the routing, but the project manager may customize the objects, as well as add new questions.

9.5 Generating Panel WI

When the project manager has created the questionnaire, the response database can be created. The process is exactly the same as for all Confirmit projects: see Chapter 7 Preparing for Data Collection.

The survey for panelist recruiting may be deployed as any other survey in Confirmit, i.e. as an Open survey, 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 exactly the same way as for other projects in Confirmit: see Chapter 7 Preparing for Data Collection. The only difference is that besides choosing the template for the survey, one also has to choose the template for Panelist pages, i.e. the lay out of the web pages where the panelists can log in and get an overview of their profile. (see Chapter 9.6).

General options	Advanced WI options
Recipient of error notifications	☐ Customize navigation buttons
Survey design confirmit default (blue)	☐ Cell-area click for grid
Panelist pages design CONFIRMIT Default	☐ Label click for single and multi (select by clicking answertext)
☐ Include progress bar	☐ Auto-next (proceed to next page automatically when possible)
☐ Reserve a fixed area for error messages	☐ Global button images
☒ Generate back button	
☐ Include a link that allows respondent to continue where he left off upon reentry.	
☒ Allow user to modify answers after initial submission	
☒ Allow user to modify answers after the interview is complete	
Use system's default validation for	
☒ Answer required checks	
☒ Exclusivity tests	
☒ Other-Specify checking	
☒ Rank order tests	
☐ Limited survey (Requires a respondent list)	
☐ Generate login page (User ID/password must be provided with respondent data)	
☐ Generate pop-up survey	
OK	

Figure 146: WI Generator

9.6 Panelist Web Page Templates

The Panelist Pages Templates Editor is accessed through the General Confirmit menu by clicking the *Templates* link and choosing *Panel*.

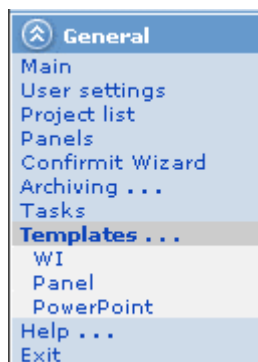


Figure 147: Accessing Panel Templates Editor

When clicking on the Panel link, the project manager will be brought to the Panel Template Editor.

Choose Panel template to edit or copy an existing template.

p0128897

Template list

CONFIRMIT Default

Example Template

Edit

Copy

Delete

Template Editor

General

Log in

Useraccount

History

Incomplete

Password

Save

General options

Name

Example Template

Description

Example Template

Figure 148: Panel Template Editor

Setting	Description
Edit	Clicking this button will open the chosen template for editing.
Copy	Clicking this button will create a copy of the chosen template.
Delete	Clicking this button will delete the chosen template.
General	General settings for the template. When the user clicks the edit button, this page is displayed by default.
Log in	Allows the user to edit the panelist log in page lay out.
User account	Allows the user to edit the panelist User account page lay out.
History	Allows the user to edit the panelist History page lay out.
Incomplete	Allows the user to edit the panelist Incomplete page lay out.
Password	Allows the user to edit the panelist Password page lay out.
Save	Clicking this button will save the changes.

Table 50: Template Editor Settings

Setting	Description
Template company	The owner company of the template.
Name	Enter the name of the template here.
Description	Give a short description of the template.

Table 51: General Template Settings

The picture below shows the template editor for the panelist Login page:

Template Editor

General

Log in

Useraccount

History

Incomplete

Password

Save

'Log in' page definition

```

<HTML>
<HEAD>
<TITLE>Log in page</TITLE>
</HEAD>
<BODY BGCOLOR=white>
<P>
<TABLE border=0 cellPadding=0 cellSpacing=0 width="100%">
  <TR>
    <TD noWrap><FONT size=3><B>^TXTTITLE^</B></FONT></TD>
    <TD vAlign=center width=*>
      <TABLE bgColor=black border=0 cellPadding=0 cellSpacing=0 height=1
        <TR>
          <TD width=1000 height=1 bgcolor=black></TD>
        </TR>
      </TABLE>
    </TD>
  </TR>
  <TR>
    <TD colspan=2>^TXTHEADER^</TD>
  </TR>

```

Preview

'Log in' primitives

^TXTTITLE^	Page title	^TXTHEADER^	Introtext
^TXTPLSLOGIN^	Login text	^TXTPLSUSERANDPW^	Instruction
^ERRORMSG^	Error message	^TXTUSERNAME^	Username text
^FIELDUSERNAME^	Username field	^TXTPW^	Password text
^FIELDPW^	Password field	^FORMACTION^	HTML FORM action
^BTNOK^	OK button		

Figure 149: Login Page Template Editor

The template is made using HTML code, and in order to include certain text fields and text in the template, one has to use the primitives that are listed below the editing window.

Clicking the Preview button will show the lay out of the particular page.

PANELIST LOGIN PAGE

This is the panelist login page

Please Log In

The user name or password is illegal

Please type your user name and password to enter

User Name

Password

OK

Powered by CONFIRMIT

Figure 150: Preview Panelist Login Page

Clicking the “<<” button will bring the user back to the editing page.

Everything explained above about the Login page applies to User account, History, Incomplete, and Password pages.

9.7 Panelist Overview

Once the respondents start answering the panel survey, the project manager can view the recruited panelists and edit the panelist details.

The project manager can access the *Panel list* from the *General* menu by clicking the link *Panels*. To view the panelists of a particular panel, the project manager has to choose a panel from the Panel list and then click the link *Panel* under the *Project* menu. This menu will have three subcategories:

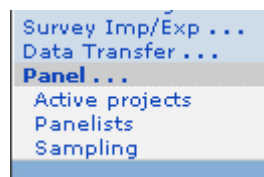


Figure 151: Panel Menu

Click *Show panelists* link, and the panelist overview will be displayed.

Shows the panelists for the current panel								p0128897
Delete		Columns						
☐	panelistid	routing_status	name	email	gender	age	username	password
								Search
☐	1	1	Alexander Alex	alex@whoknowswhere.com	Male	26-30	alex	alex
☐	2	1	Axel Axelsson	axel@firmglobal.com	Male	31-35	axel	axel
☐	3	1	Klara Klok	klara@etsted.no	Female	41-45	klara	klara
☐	4	1	John Smith	john@somewhere.com	Male	46-50	john	john
☐	5	1	Sara Smith	sara@nowhere.com	Female	31-35	sara	sara
☐	6	1	Jamie Lee	lee@there.com	Female	36-40	lee	lee
☐	7	1	George Carpenter	george@here.com	Male	36-40	george	george

Figure 152: Panelist Overview

To view panelist information, highlight a panelist. Now you will be able to view and edit the particular panelist’s Details, view all the surveys the panelist has been assigned, which surveys the panelist has completed, which he/she has started, but has not completed, and which surveys the panelist has not yet started to answer.

Figure 153 shows that the highlighted panelist, Jamie Lee, has not received any surveys yet.

Jamie Lee					
Details	All surveys	Completed surveys	Surveys started, not completed	Surveys not started	

Figure 153: Highlighted Panelist

Figure 154 shows the panelist detail editor.

Shows the panelists for the current panel p0128897

☐	panelistid	routing_status	name	email	gender	age	username	password
☐	1	1	Alexander Alex	alex@whoknowswhere.com	Male	26-30	alex	alex
☐	2	1	Axel Axelson	axel@firmglobal.com	Male	31-35	axel	axel
☐	3	1	Klara Klok	klara@etsted.no	Female	41-45	klara	klara
☐	4	1	John Smith	john@somewhere.com	Male	46-50	john	john
☐	5	1	Sara Smith	sara@nowhere.com	Female	31-35	sara	sara
☐	6	1	Jamie Lee	lee@there.com	Female	36-40	lee	lee

Jamie Lee

Details	All surveys	Completed surveys	Surveys started, not completed	Surveys not started

Details

routing_status
name
email
gender
age
username
password
last updated 2002-05-30 12:49:12

Figure 154: Panelist Details

Setting	Description
Filter	Checking this flag will allow you to filter the panellists. See Figure 143.
Prev	Allows the project manager to move back in the list of panelists.

Next	Allows the project manager to move forward in the list of panelists.
View	Clicking this button will display the Modal Window with the available panelist information fields, and selected panelist information fields. Here the project manager can choose which fields to include in the panelist overview. See Figure 144.
Delete	The highlighted panelist will be deleted. A warning will be displayed first.
Details	Clicking this button will display the current panelist's details. The project manager will be able to edit them.
All surveys	Clicking this button will display all the active surveys for the current panelist.
Surveys completed	Clicking this button will display all the completed surveys for the current panelist.
Surveys started, not completed	Clicking this button will display all the started, but not completed surveys for the current panelist.
Surveys not started	Clicking this button will display all the surveys the current panelist has not started to answer.
Save	Clicking this button will save the changes made to the panelist details for the current panelist.

Table 52: Panelist Overview Settings

If the list of panelists is long and the project manager wants to search for some particular panelists, he/she can enable the Filter function.

Shows the panelists for the current panel p0128897

☐	panelistid	routing_status	name	email	gender	age	username	password
☐	4	1	John Smith	john@somewhere.com	Male	46-50	john	john
☐	6	1	Jamie Lee	jamie@there.com	Female	36-40	lee	lee

Figure 155: Filter Function

Figure 155 shows that the project manager has searched for panellists whose name starts with “J”. The search has returned two panellists. The Search fields are not case sensitive.

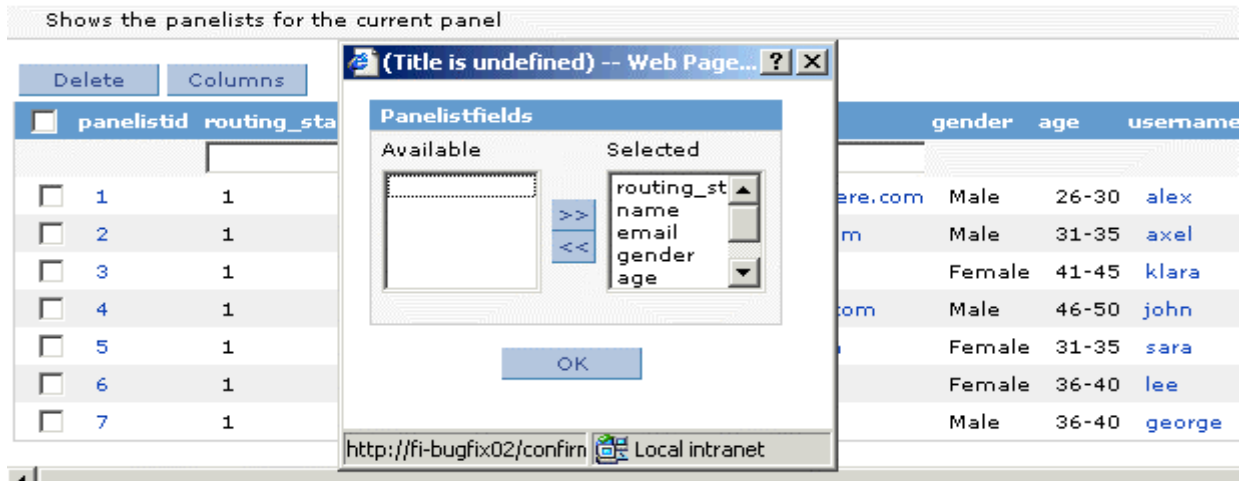


Figure 156: The Modal Window

Figure 156 shows that the project manager has opened the Modal Window by clicking the View button. The picture shows that all available panelist detail fields have been selected to be viewed in the panelist overview. The items are moved between the Available and Selected fields by highlighting an item, and then clicking the arrow buttons.

9.8 Sending Surveys to Panelists

Once the panel has been gathered, surveys may be sent to the panelists.

Note! If you wish to use any information about the panelists in reporting, you have to include these variables in the survey and mark them as Panel variables in Properties. This linking is done in exactly the same way as with Background variables, only the panelist information is drawn from the panel, and not from the respondent list. See chapter 8 for more information.

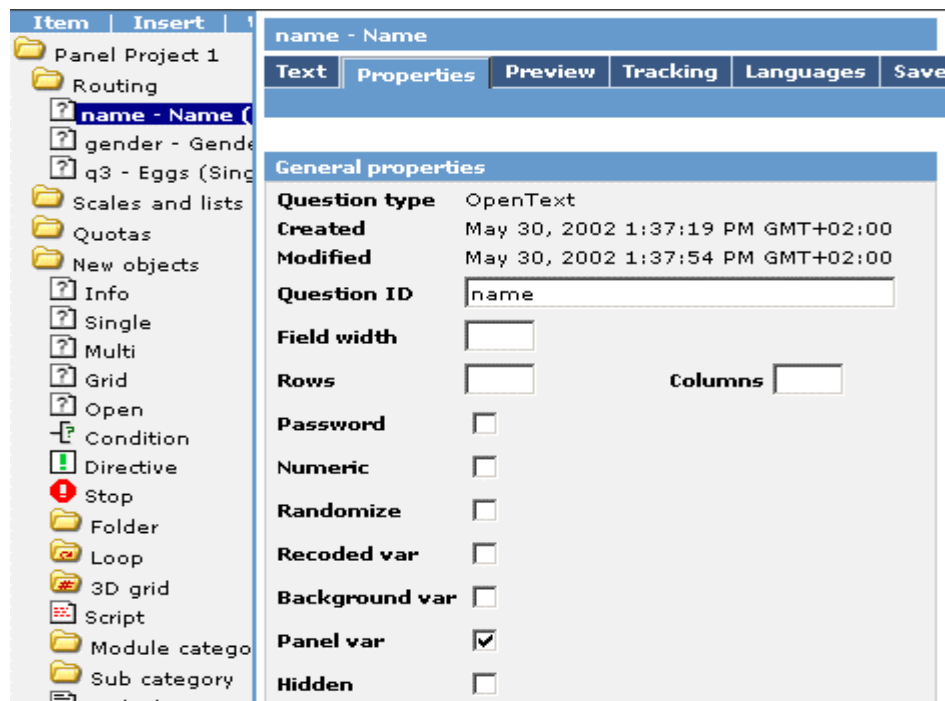


Figure 157: Adding a Panel Variable to the Survey

The surveys can be either sent to the panelists by email, or, since uploading the panelid and panelistids into the survey does the linking between the panel, panelist and the surveys, the panelists are able to access all their surveys via World Wide Web, from personalized pages.

See Chapter 9.11.

To send out surveys to the panelists you may use the Sampling functionality.

9.9 Sampling Functionality

The Sampling functionality allows you to define several samples within the same panel, and send out different surveys to different samples accordingly. You can also use the Sampling functionality to send out surveys to all panel members.

This functionality consists of a rule editor and a sampling engine. The project manager can define the rules for sampling, and the sampling engine extracts a set of panelists from the panel.

9.9.1 Defining Various Samples in a Panel

The user enters the sampling functionality by choosing a Panel from the Panel list, clicking *Panel* in the Project menu, and choosing *Sampling*:

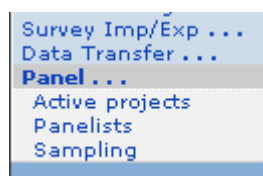


Figure 158: Panel Menu

The Sample List overview will be displayed when you click *Sampling*. If this is the first sample you want to add to your panel, the sample list will be empty. To create a sample, press on the *New* button.

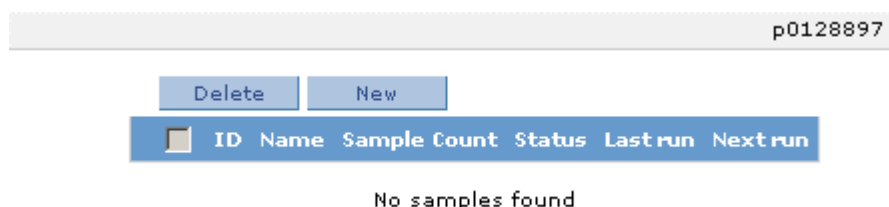


Figure 159: Sample list

Setting	Description
ID	The sample ID given by the system.
Name	The name of the sample.
Sample Count	Number of panelists corresponding with the sample criteria.
Status	States whether the task is complete, incomplete, etc.
Last run	Specifies when the sample was created.
Next run	If the sample extraction is set up as a recurring task while new panelists are being added to the panel, the time for the next run will be displayed.
Delete	If you want to delete a sample, check the checkbox, and press the Delete button. You will not be able to delete a sample that is being used in an active project.

Table 53: Sample List Fields

The Rule Editor Wizard and the panel questionnaire tree will be displayed when the user has clicked *New*.

STEP 1 - Build the rule

Name: Male

Expression: [gender] = 'Male'

of resp.: 50 grouped: random

Buttons: Add >, < Edit, Check, Undo, Delete

Rule builder

Variables	Operators	Values
gender	=	Male [Male]
	<>	Female [Female]
	AND	
	OR	
	(	
	)	

Buttons: Cancel, < Back, Next >, Finish

Figure 160: RuleEditor Wizard

Setting	Description
Name	The name of the rule or sample.
Expression	The field where the expression is entered.
# of resp	Number of panelists that the sampling engine should extract out of the total number of panelists corresponding to the rule.
Grouped	The panelists can be grouped: ascending, descending, random
Check	Clicking this button will check whether the expression is correct.
Undo	Clicking this button will undo the last action added to the expression.
Add	Clicking this button will add the expression to the expression list.
Edit	If you highlight an expression in the expression list and click this button, the expression will be moved to the expression field for editing.
Expression list	All the expressions that are applied to the sample are gathered here.
Delete	If you highlight an expression and click this button, the expression will be deleted. A warning will be displayed first.

	warning will be displayed first .
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 Sample list.
Next	Clicking this button will bring you to the Schedule set-up of the sample.

Table 54: Rule Wizard Editor Settings

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 panellists to be extracted from the panel before you can add an expression to the expression list.

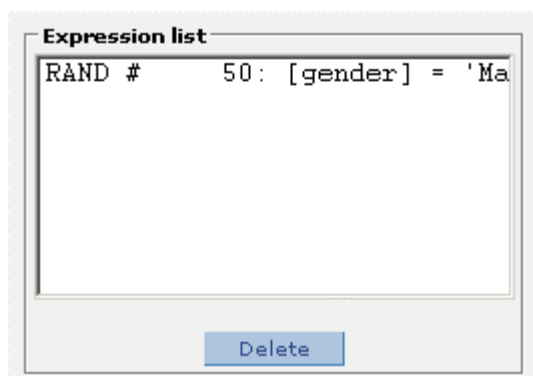


Figure 161: One Expression in Expression List

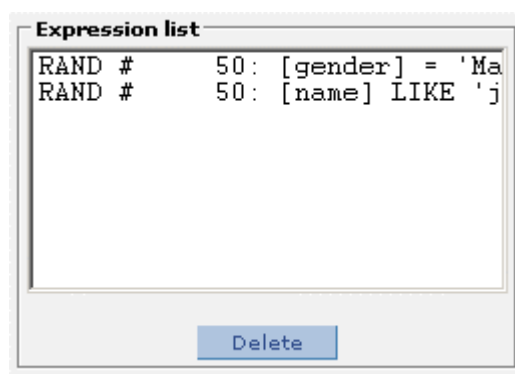


Figure 162: Two Expressions in Expression List

If you build your expression on an Open ended variable in a Panel, you can perform a text string search with wildcards to find panelists who have values that start with, end with or include a specific string, e.g. "j%", "%j", "%j%".

Rule builder

Variables	Operators	Values
name	LIKE	" j%
	NOT LIKE	
	AND	
	OR	
	(	
	)	

Cancel < Back Next > Finish

Figure 163: Expression Built on an Open Question

In the panel questionnaire tree you can see two nodes in the Functions folder: Survey count and Last participation.

You can extract your sample based on the number of surveys that a panelist has answered. In the picture below, the user is in process to build an expression that will include in the current sample the panelists who have answered more than 3 surveys. To be able to build an expression based on Survey count, you have to highlight the Survey count folder, and the Rule builder fields for this node will be displayed.

ExamplePanel

Routing

routing_stat

name - Nam

email - Ema

gender - Ge

age - Age (:

IF f('routing

Functions

SURVEY CO

LAST PARTI

STEP 1 - Build the rule

Name

Male

Expression

SURVEY_COUNT >

of resp.

grouped

ascending

Check

Undo

Expression list

RAND #

50: [gender] =

RAND #

50: [name] LIKE

Add >

< Edit

Delete

Rule builder

Variables	Operators	Values
SURVEY_COUNT	=	3
	<>	
	>	
	>=	
	<	
	<=	
	AND	
	OR	
	(	
	)	

Figure 164: Survey Count

You can also extract your sample based on the date of the last time a panelist has participated in a survey. In the picture below, the user is in process to build an expression that will include in the current sample the panelists who have last time participated in a survey before the 28th of September, 2001. To be able to build an expression based on Last participation, you have to highlight the Last participation folder, and the Rule builder fields for this node will be displayed.

STEP 1 - Build the rule

Name

Expression

Expression list

RAND #	50:	[gender]
RAND #	50:	[name]

of resp. grouped

Rule builder

Variables	Operators	Values
LAST_PARTICIPATION	<	" 2001 - 9 - 28 "

Figure 165: Last Participation

When you have created the sample extraction rules, you may click *Next* button, and Schedule set-up for loading the sample will be displayed. You can either choose to create the sample ASAP or Schedule it for later execution.

STEP 2 - Schedule setup

Start time

Figure 166: Schedule Set-up

When you have chosen the desired start time, click the *Finish* button. This will bring you to the Task Settings, which are applied to all batch jobs. You may also define a sample extraction as a Recurring task.

Delete		New				
	ID	Name	Sample Count	Status	Last run	Next run
	1	Male	4	Completed	2002-05-30 13:58:45	Never

Figure 167: Sample List With a Sample

If you enter the Sample list now you will see that a sample has been created. If you want to modify a sample, you can click the Edit link, and you will be brought back to the Rule Editor Wizard.

9.9.2 Sending Surveys to Samples of Respondents

Once you have defined your samples you can load them up to the surveys. This is done from the Respondents menu under Project.

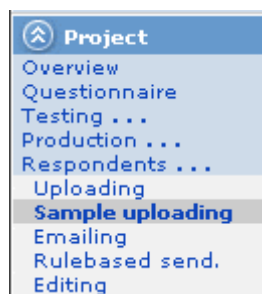


Figure 168: Sample Uploading in Respondents Menu

First you choose a project from the Project list and then click *Sample Uploading*. The Sample Upload page with the Panel list will be displayed. As you can see in the picture below, no samples are displayed, because none of the panels has been chosen.

Select a panel to view its samples, then select a sample to upload.
p0129344

▲ Name	ID	Company	Creator	Created
*				▼
ExamplePanel	p0128897	UserManual	Manual, User	30-May-02 12:13:33 PM

Search

Figure 169: Sample Upload Page

Choose the panel with the sample you want to send the survey to, and all the samples in the current panel will be displayed in the Samples window. Highlight the sample you want to upload to the survey and click *Upload*.

Select a panel to view its samples, then select a sample to upload.
p0129344

Name	ID	Company	Creator	Created
*				
ExamplePanel	p0128897	UserManual	Manual, User	30-May-02 12:13:33 PM

Rule ID	Rule name	Sample count
1	Male	4

Figure 170: Sample Upload Page

Clicking the *Upload* button will bring you to the *Load Database* page, which is the same as when uploading respondent lists. See chapter 8.2.

p0129344

Load Database?

Load database?

Figure 171: Load Database Page

Now you can email the survey to the new sample, or since the new respondents are panelists, they will be able to access the survey from their personal pages. (See chapter 9.11)

9.9.3 Defining the Entire Panel as a Sample

If you want to send a survey to the entire panel, you may define the entire panel as a sample.

You will have to build the sampling expression on the panel default variable *Status*, which checks whether a respondent has been added to the panel.

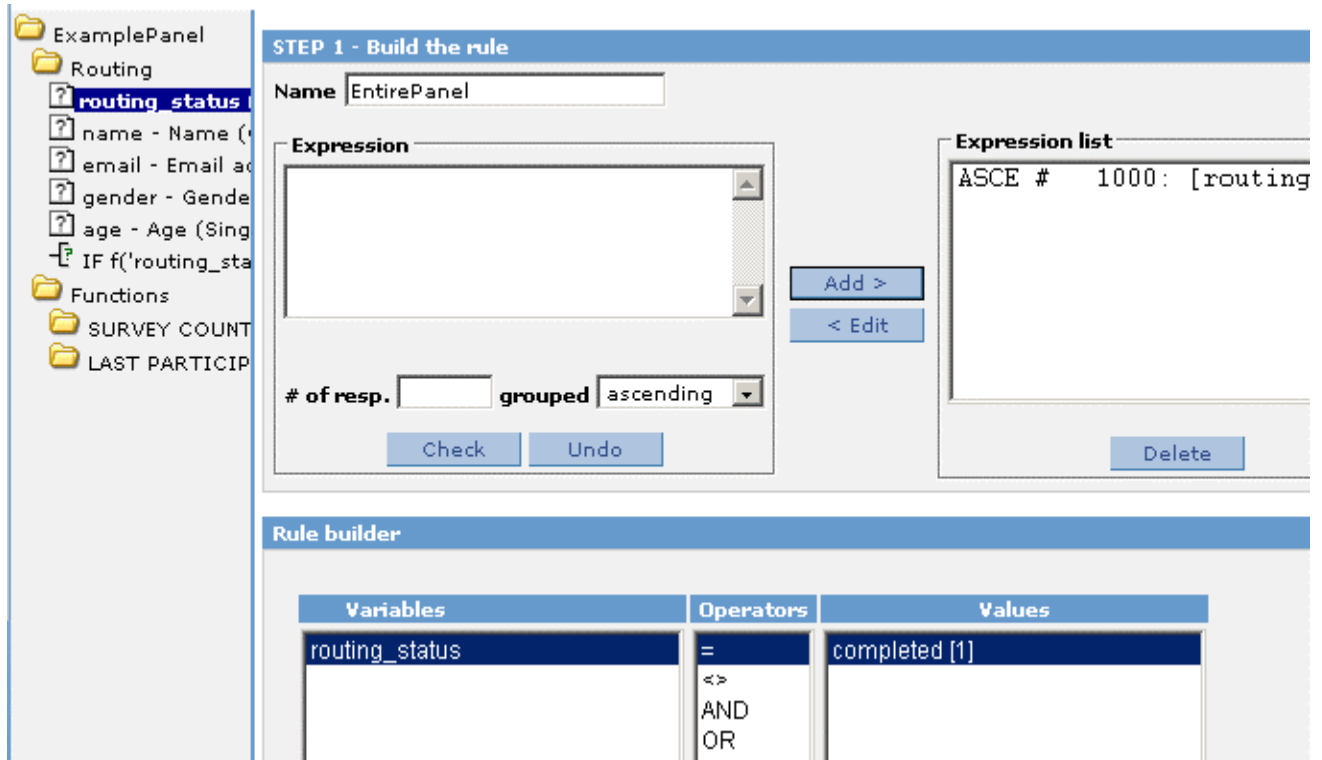


Figure 172: Bulding an Entire Panel Sample

Loading of the sample into surveys is done in the same fashion as described in chapter 9.9.2.

9.10 Survey Overview in a Panel

The Project Manager can view all the projects linked to a panel by opening the panel from the Panel list, and choosing *Show active projects* from the Panel menu.

If there are no surveys linked to the panel, or all the surveys have been closed, the following picture will be displayed.

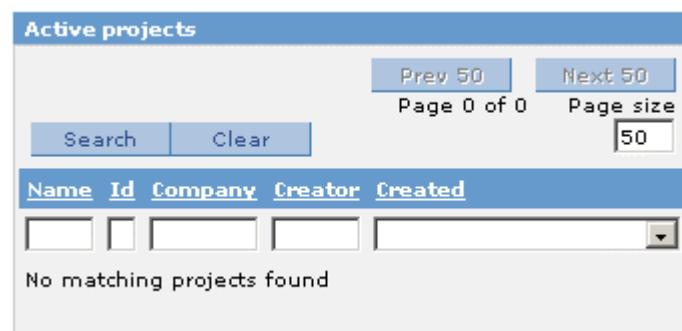


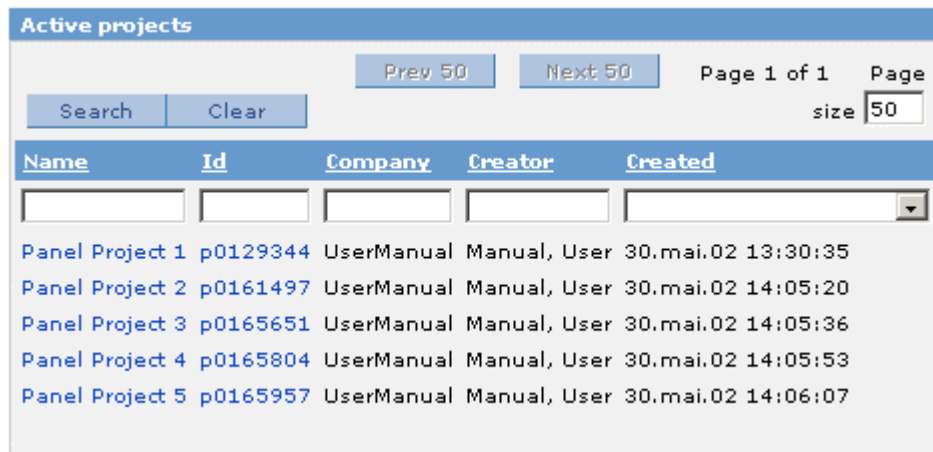
Figure 173: Projects in Panel Page with No Matching Projects

If the list of surveys linked to the panel is long, the project manager can search for the projects in the same manner as in the Project list: by project title, ID, company, project creator, or when the project was created.

Setting	Description
Search	Click this button to search for the project after having entered the search criteria.
Clear	Click this button in order to clear the entered search criteria.
Prev	Will display the previous specified number of projects.
Next	Will display the next specified number of projects.
Page size	Change the number of displayed projects here, and click on the <i>Search</i> button.

Table 55: Active Projects Screen Settings

If there are surveys linked to the panel, they will be displayed in the *Projects in panel* screen. The project title and ID are formed as links, and clicking on a project link will bring you to the specified project's overview page.



Name	Id	Company	Creator	Created
Panel Project 1	p0129344	UserManual	Manual, User	30.mai.02 13:30:35
Panel Project 2	p0161497	UserManual	Manual, User	30.mai.02 14:05:20
Panel Project 3	p0165651	UserManual	Manual, User	30.mai.02 14:05:36
Panel Project 4	p0165804	UserManual	Manual, User	30.mai.02 14:05:53
Panel Project 5	p0165957	UserManual	Manual, User	30.mai.02 14:06:07

Figure 174: Projects in Panel Page with Active Projects

Once there are active surveys linked to the panel, the project manager can view the activity per panelist by entering the panel from the *Panel list*, and choosing *Show panelists* from the *Panel* menu under the *Project menu*.

The project manager can highlight a panelist, and then by clicking on the tabs in the survey overview window check the panelist's status.

The following picture shows all the active surveys for the panelist Axel Axelson.

Shows the panelists for the current panel p0128897

Delete Columns

☐	panelistid	routing_status	name	email	gender	age	username	password
☐	1	1	Alexander Alex	alex@whoknowswhere.com	Male	26-30	alex	alex
☐	2	1	Axel Axelsson	axel@firmglobal.com	Male	31-35	axel	axel
☐	3	1	Klara Klok	klara@etsted.no	Female	41-45	klara	klara
☐	4	1	John Smith	john@somewhere.com	Male	46-50	john	john
☐	5	1	Sara Smith	sara@nowhere.com	Female	31-35	sara	sara
☐	6	1	Jamie Lee	iamie@there.com	Female	36-40	lee	lee

Axel Axelsson

Details

All surveys

Completed surveys

Surveys started, not completed

Surveys not started

respid	surveyid	surveyname	status	interview_start	interview_end
2	p0129344	Panel Project 1	complete	Thu May 30 14:44:56 UTC+0200 2002	Thu May 30 14:45:04 UTC+0200 2002
2	p0161497	Panel Project 2	complete	Thu May 30 14:45:29 UTC+0200 2002	Thu May 30 14:45:37 UTC+0200 2002
2	p0165651	Panel Project 3			
2	p0165804	Panel Project 4			
2	p0165957	Panel Project 5			

Figure 175: Survey Overview for a Panelist

Setting	Description
Respid	The panelist's panelistid.
Surveyid	The survey ID number.
Surveyname	The title of the survey.
Status	The status of the survey for the current panelist: complete, incomplete, etc.
Interview_start	The time when the interview was started.
Interview_end	The time when the interview was completed.

Table 56: All Surveys Overview

9.11 Panelist Login Pages

When surveys have been linked to the panel, the project manager can send the panelists the link to the web page where they can access their surveys, as well as edit their profile.

You can also send out emails with login page information automatically after the respondents have been recruited to a Panel, by using e.g. 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"
)

```

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, make sure the script appears after these questions.

Inside the script you paste in the text above, and modify the text to meet your needs.

All displayed text must be typed inside quotation marks. Between brackets of text you need to 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.

Line shift is marked by a \n typed inside quotation marks. To get a paragraph shift simply write \n twice: +"\n\n". Please remember to also use the quotation marks for line shifts as well as regular text.

The project number of the panel you are inviting users to must be typed in instead of the X-es in the URL address in the email.

The link to the panelists' web page will always be as follows:

<http://yourorFIRMssurveyconfirmitserver/wi/pXXXXXXX/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 have to enter the username and password they provided when they signed up for the panel.

Login:

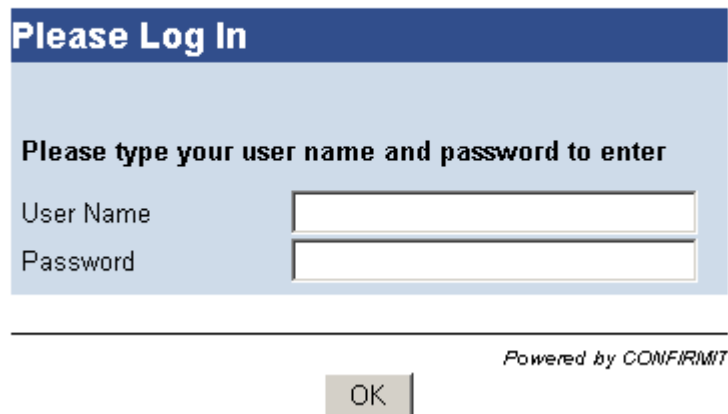
The link to the panelists' web page will be:

<http://survey.confirmit.com/wi/pXXXXXXX/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'. Underneath this instruction are two input fields: 'User Name' and 'Password'. Below the input fields is a grey 'OK' button. To the right of the button, the text 'Powered by CONFIRMIT' is displayed.

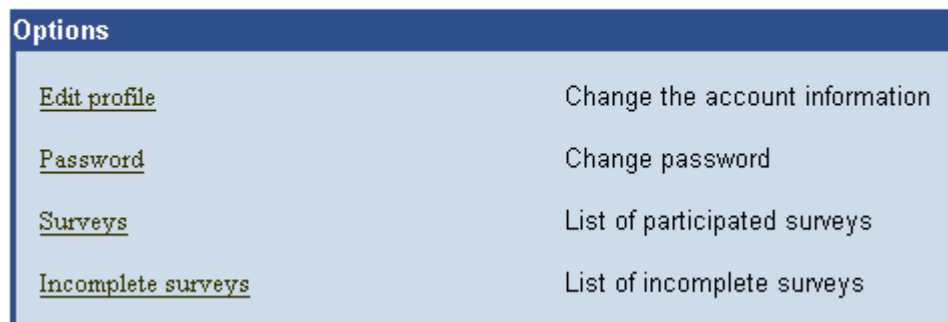
Please Log In	
Please type your user name and password to enter	
User Name	
Password	
OK	
Powered by CONFIRMIT	

Figure 176: 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, a light blue box contains a table with four rows of options. Each row has a link on the left and a description on the right.

Options	
Edit profile	Change the account information
Password	Change password
Surveys	List of participated surveys
Incomplete surveys	List of incomplete surveys

Figure 177: 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.

firm

Please enter your name

Axel Axelson

Please enter your email address

axel@firmglobal.com

Please, specify your gender:

☒ Male

☐ Female

Figure 178: 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 179: 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 will give the panelist 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 180: Survey History Page

The *Not completed surveys* link will bring 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 181: Surveys Not Completed Page

As you can see, 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.

10 Online Coding Tool

NB! For some customers, Online Coding Tool is a chargeable Add-On.

10.1 Why Have a Coding System?

The coding system is a tool for coding open-ended questions in order to give the answers pre codes 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 182: 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%
4vvd	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 183: 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.

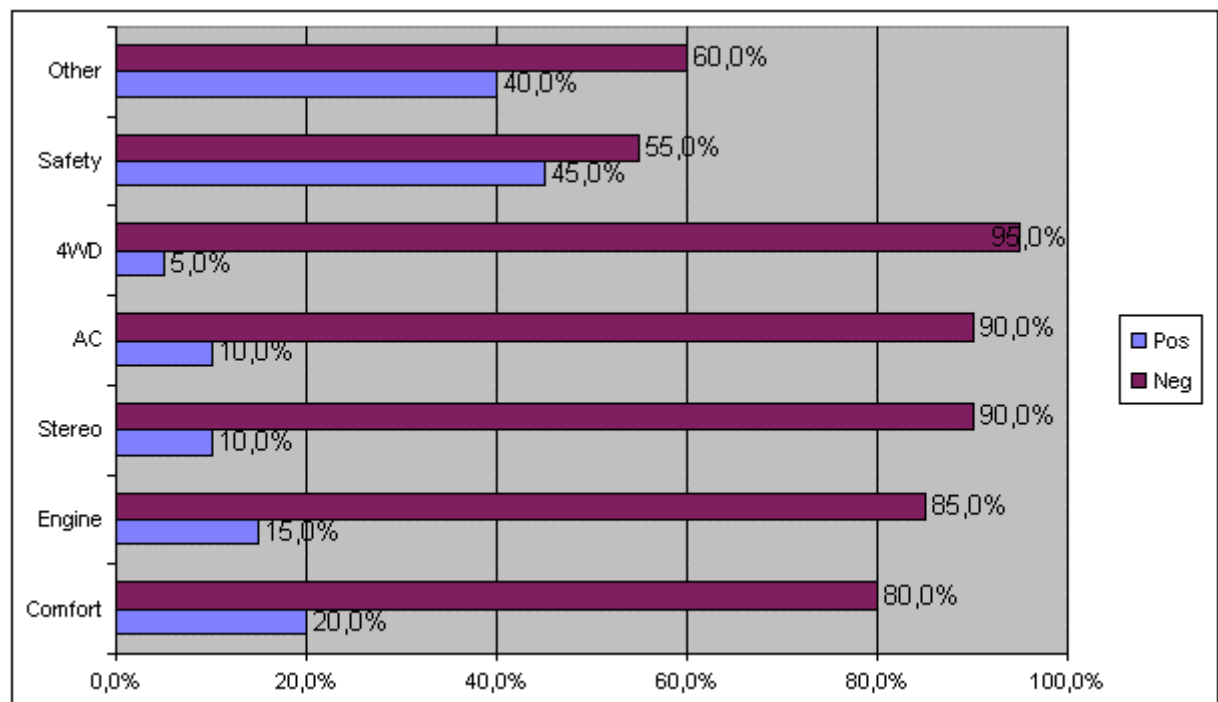


Figure 184: This Chart was produced using open-ended text answers after the online coding was complete

10.2 *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 10.3 - "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 10.5 - "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 10.6 - "Coding Window".

10.3 *Entering Online Coding*

10.3.1 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 the main menu in Conformat. When choosing this menu item the window described in section 10.5 opens.

10.3.2 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

[\[Change\]](#)

Save

Figure 185: User Settings window

Object Permissions

The project administrator must define who will have the permission to code the open-ended questions. This is done in the Object Permissions window, found under User settings. It will appear similar to the following image.

ExampleSurvey

Users in company

Name	-	R	W	D	Administrate projects	Opentext coder
john (John Smith)	☒	☐	☐	☐	☐	☐
user (User Manual)	☐	☐	☐	☒	☒	☐

Groups

Name	-	R	W	D	Administrate projects	Opentext coder
Other users/groups						

Other users/groups

Name	-	R	W	D	Administrate projects	Opentext coder

Add users
Save

Figure 186: Object Permissions

10.4 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.

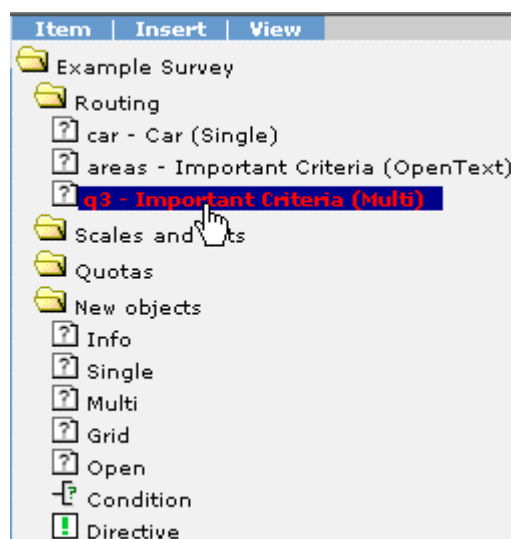


Figure 187: Multi question for online coding

This question works like other multi questions, i.e. 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 7 codes, but it is of course possible to define any number of codes.

q3 - Important Criteria							
Text	Answers	Properties	Preview	Tracking	Languages	Save	
Answers							
English	Precode	Weight	ColWidth	BgColor	Punch	KeepPos	Other
Comfort	1						
Engine	2						
Stereo	3						
AC	4						
4WD	5						
Safety	6						
Other	7						
Add Add predefined Clear Delete rows Save							

Figure 188: 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.

q3 - Important Criteria

Text

Answers

Properties

Preview

Tracking

Languages

Save

General properties

Question type

Multi

Created

June 1, 2002 1:46:22 PM GMT+02:00

Modified

June 1, 2002 1:49:47 PM GMT+02:00

Question ID

q3

Field width

List Rows

List Columns

Precode mask

Randomize

☐

Recoded var

☐

Background var

☐

Panel var

☐

Hidden

☒

Not required

☐

Ordered

☐

Opentext coding

☒

Coding of

areas

OpenText

☐

Advanced layout properties

Button images

Global images (if specified)

Autocheck other

☐

Figure 189: 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	E.g.: 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 57: Examples of defining multi questions for online coding

10.5 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. 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:

Open id	Multi id	Multi question title	Coder	Status
areas	coded	Important Criteria	(none)	0 of 6

Save

(none)
coder1
user

Figure 190: The administrator window

The coders will see a window like this:

Open id	Multi id	Multi question title	Locked by	Unlock	Status
areas	coded	Important Criteria	coder1	☐	0 of 6

Unlock

Figure 191: The coder window

10.6 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 uncoded questions.

Coding Window, current database: test
p0000538

Current coder: coder1

Question no	Question text	# WorkingSet	Current pos.
areas	Please describe the most important criteria for you when considering purchasing a new car.	6	1

☒ Show code frames

☒ coded Answer-text search:

☒ uncoded %

Code search:

Response-ID

Ascending

Response-ID	Answer-text	Code	code frame
1	Climate control inside the car	4	AC
2	Security issues	6	Safety
3	Exterior and interior design, security, sun-screen	1,4,6	Comfort,AC,Safety
4	Price level, safety issues, design		
5	Engine power, fuel usage		
6	Exterior design		

Code	Code frame
1	Comfort
2	Engine
3	Stereo
4	AC
5	4WD
6	Safety
7	Other

Figure 192: The coding window

10.6.1 Elements of the Coding Window

10.6.1.1 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.

10.6.1.2 Searching and Sorting

The next section of the coding window is for "searching and sorting"-answers.

Coding Window, current database: test p0000538

Current coder: **coder1**

Question no	Question text	# WorkingSet	Current pos.	Code	Code frame
areas	Please describe the most important criteria for you when considering purchasing a new car.	2	1		

☒ Show code frames

☒ coded
☐ uncoded

Answer-text search:

Code search:

Response-ID:

Response-ID	Answer-text	Code	code frame
1	Climate control inside the car	4	AC
3	Exterior and interior design, security, sun-screen	1,4,6	Comfort,AC,Safety

Figure 193: The searching and sorting section

The coder can choose to include or exclude coded and / or uncoded questions in his working set of respondent answers. The default is "uncoded", in order to list all the questions that have not been coded yet. To be able to specify the working set, especially when the total number of respondents is very high, the coder can also search for a text string and / or code numbers.

The text string search can be done with wildcards to find answers that starts with, ends with, or includes 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).

An important thing to notice is that sorting and searching is carried out on all of the answers for the specific question. When sorting/search is changed the working set is changed and hence pressing any button will return to the start of the new working set.

When all search criteria has been entered, depress the go button to activate the search.

10.6.1.3 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 uncoded answers.

Coding Window, current database: test p0000538

Current coder: **coder1**

Question no	Question text	# WorkingSet	Current pos.
areas	Please describe the most important criteria for you when considering purchasing a new car.	6	1

☒ Show code frames

☒ coded Answer-text search: Code search: Response-ID:

☒ uncoded % Ascending Go

Response-ID	Answer-text	Code	code frame
1	Climate control inside the car	4	AC
2	Security issues	6	Safety
3	Exterior and interior design, security, sun-screen	1,4,6	Comfort,AC,Safety
4	Price level, safety issues, design		
5	Engine power, fuel usage		
6	Exterior design		

Replace << First 15 < Prev 15 Next 15 > Last 15 >> Save

Code	Code	frame
1	Comfort	
2	Engine	
3	Stereo	
4	AC	
5	4WD	
6	Safety	
7	Other	

Figure 194: The remaining uncoded 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.

10.6.1.4 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.

Replace << First 15 < Prev 15 Next 15 > Last 15 >> Save

Figure 195: 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).

10.6.1.5 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).

Coding Window, current database: test p0000538

Current coder: coder1

Question no	Question text	# WorkingSet	Current pos.
areas	Please describe the most important criteria for you when considering purchasing a new car.	2	1

☒ Show code frames

☒ coded
☐ uncoded

Answer-text search:

Code search:

Response-ID
 Ascending

Response-ID	Answer-text	Code	code frame
1	Climate	4	AC
3	Exterior	1,4,6	Comfort,AC,Safety

Replace:
 with:

Figure 196: 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.

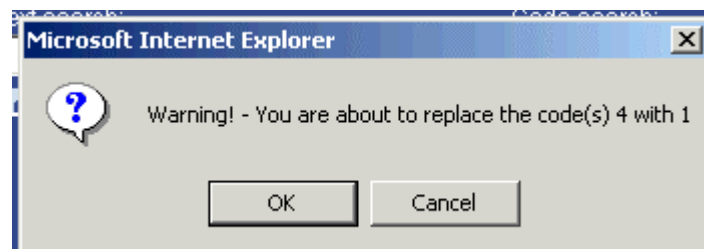


Figure 197: Warning

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.

10.6.1.6 Show or Hide Codes

It is possible to show the available codes for the question in the right section of the Coding Window. When the checkbox "Show code frames" is selected the codes will appear. When deselecting the checkbox, the codes/code frames will disappear from the screen.

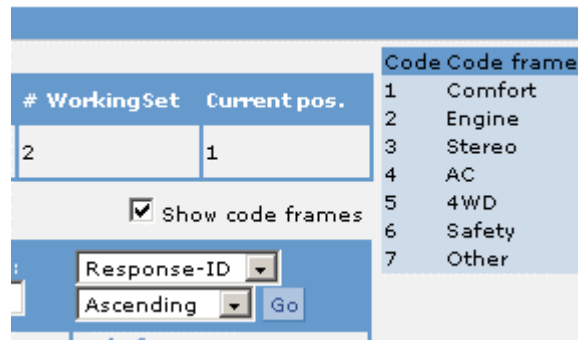


Figure 198: Show and hide codes

10.7 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.

10.7.1 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)

11 Aggregated Reporting

NB! For some of our customers, parts of the Reporting functionality (Advanced Reporting: Iterated Reporting, Pivot View, Individual Reporting (Chapter 13)) will be subject to payment based on usage of selected functions.

11.1 Introduction

All reporting functionality in Confirmit is accessed by clicking *Reports* in the main menu. Click on the *Online Reporting* and you will enter this screen:

Figure 199: 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.

11.2 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 200: 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:

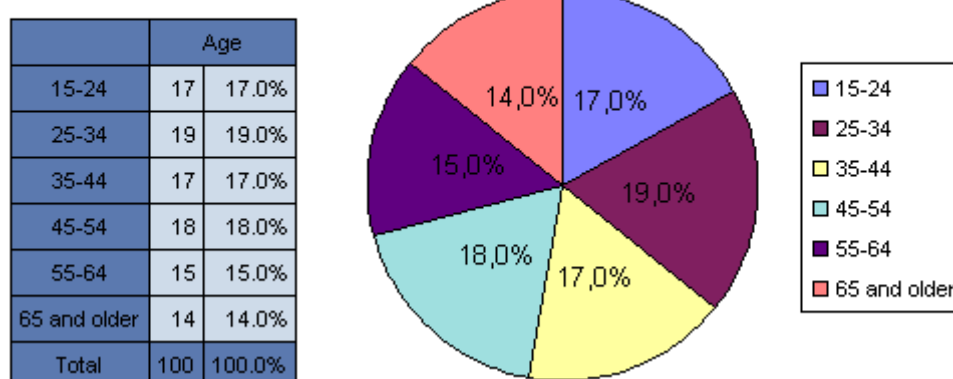


Figure 200: Reporting a single question with Excel Chart Component

When checking results directly from the “Form”-folder, all settings are either default settings or the settings from the “Settings”-frame.

11.3 Recoding Variables for Reporting Purposes

If you e.g. 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 12.

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. Be careful not to create a new database, you wouldn't want to delete your existing data. To calculate the values in the recoded variable, you will have to go to Online Reporting - Calculate variables. This is something you will have to do again if new respondents finish the survey.

Recoded variables may be used as normal questions in Online Reporting.

11.4 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 chapter 11.6 for details on building crosstabs.
- **Add time series to the report.** Drag a *New timeseries* object into the report, e.g. 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. See 11.9
- **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.

11.5 Order 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:

Export predefined reports to MS Office. p0001001

Export properties

Project ID p0001001

Report name All cars

Report iterations

- Audi
- BMW
- Ferrari
- Fiat
- Saab
- Volvo

PPT template Example PPT

Export files MS Excel and MS Powerpoint

Database Test

Language English

OLE in PPT ☐

Recipient email usermanual@firmglobal.com

Comment

Start time ASAP

ASAP
Schedule for later execution

OK

Figure 201: 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 has to 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, see Figure 202: Task settings for an ordered report .

Table 58: Report Export

Configuration of a batch job. p0001001

 The request has been added, see below.

Task instance properties

Properties	Log

Property	Value
Task type	 MS Office Export (PPT/Excel)
Task ID	9
Schedule	2002-06-01 15:01:20
Status	In queue
Approx % completed	0%
Start time	-
End time	-
Time usage	00:00:00
Assigned server	

Task definition

Figure 202: Task settings for an ordered report

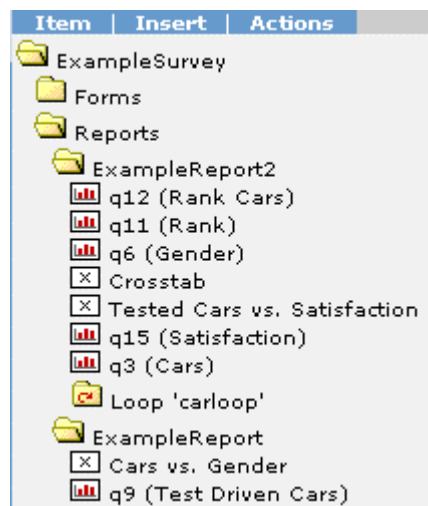


Figure 203: Project with two reports

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.

11.6 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 203). 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 204: Crosstab Table

- The “With...”-folder where the horizontal questions of the crosstab can be included (gender in Figure 193). This is done by dropping questions within the folder.

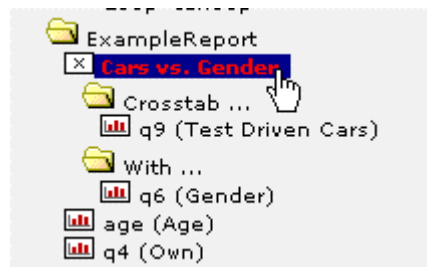


Figure 205: Crosstab: Cars vs. Gender

NB!

If you wish to use an Open Text question in a cross tabulation in reporting, remember that you have to have specified 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.

You do as follows:

- 1) Double-click the Open Text question
- 2) Go to Properties
- 3) In 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 find out that you need to use an Open Text question in a cross tabulation, you will have to 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.
- 5) **NB! Remember that the FieldWidth now has to 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.**
- 6) Go to Production
- 7) Compile production environment > choose one of the Update database options
- 8) Now the Open Text question can be used in cross tabulations in reporting.

11.7 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.

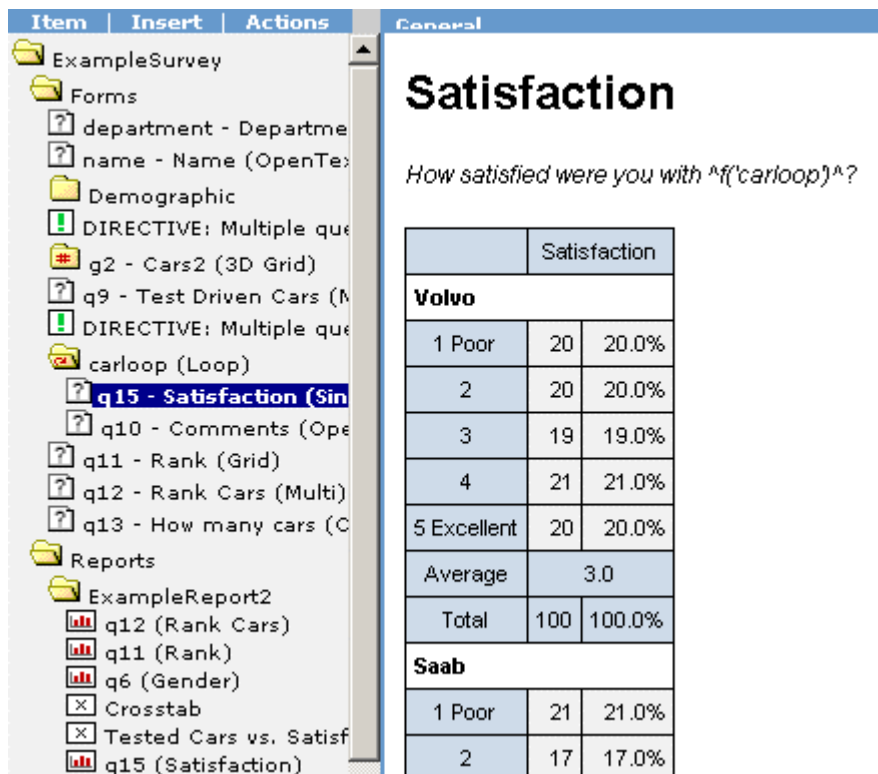


Figure 206: Showing results for loop question

- **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.

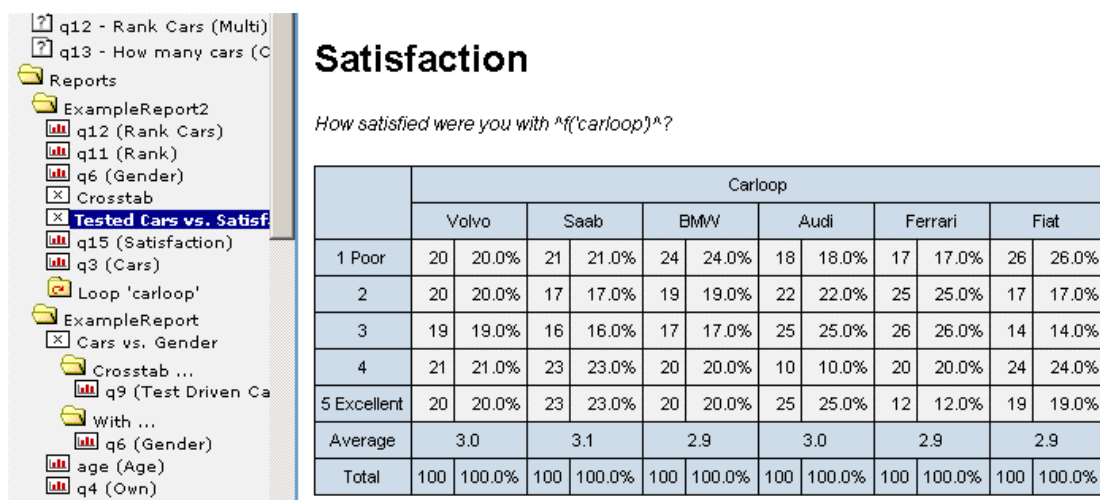


Figure 207: Loop in crosstab

For more detailed information on how to edit reporting elements of loops, see chapter 11.11.2 Report Elements Settings.

11.8 Weight Model

Conformit allows weight models to be applied to your reports. Three separate types of weight models may be used.

Weight Model Type	Description
Sample balancing	This method is used for weighing along multiple dimensions when only the marginal reference percentages along each dimension are known. E.g: 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	This method is used for weighing along multiple dimensions when all the matrix cell percentages are known. E.g: 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.

Table 59: Weight Model

Create a new weight model by dragging the "New weight model" object into the "Weight models" folder. Double click the new object to edit its properties, or right click the object 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	<pre> 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 </pre>

Figure 208: Weight model properties

Marginal percentages for 'q6'	
Male [1]:	49
Female [2]:	51
Save	

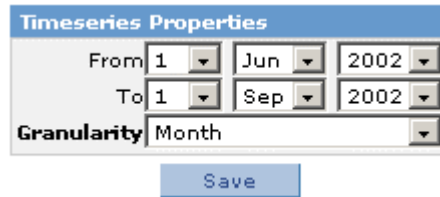
Figure 209: Percentages

Respondent weights are calculated when the user selects [Action => Calculate weights] after first having activated the weight model folder. 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 weighing on questions that were answered only by part of the respondents (filtered questions).

11.9 Time Series

Use time series to create trend reports.

1. Drag a 'New timeseries' object into the report, e.g. 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 210: 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 211: Timeseries Crosstab

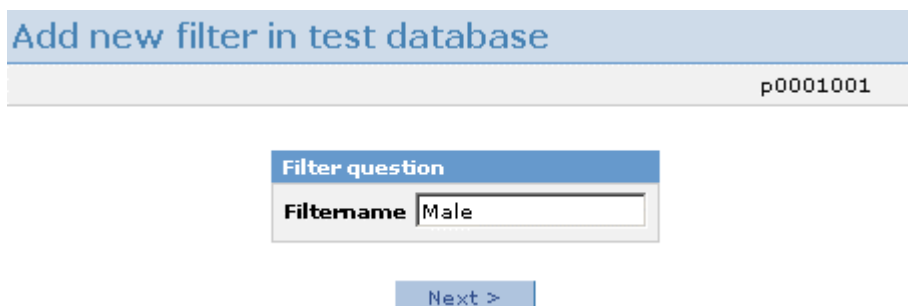
11.10 Filters

11.10.1 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 (e.g. Male).
4. Select the precodes to let through the filter (e. g. the male precode if only male respondents are to be counted).



Add new filter in test database

p0001001

Filter question

Filtername Male

Next >

Figure 212: Add New Filter

Define filter in test database	
Edit name and/or answer alternatives for the filter.	p0001001

Filter	
Filter	Male
Form/Variable	q6 (Specify:)
Element	Use
1 (Male)	☒
2 (Female)	☐
Save	

Figure 213: 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 214: Filter Definition 2

3. 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 215: Adding New Filter

4. 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

p0001001

Edit name and/or answer alternatives for the filter.

Filter

Filter

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 216: Editing Answer Alternatives

5. 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 217: List of Filters

11.10.2 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 e.g. 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 218: 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

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

Figure 219: 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.

11.10.3 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)

Figure 220: 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

Form/Variable q5 (Evaluate the cars:)

Grid element Ferrari

Element	Use
1 (Unsatisfactory 1)	☐
2 (2)	☐
3 (3)	☐
4 (4)	☒
5 (Excellent 5)	☒

Figure 221: Editing Answers for a Grid Question

11.10.4 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 11.11.2.3

11.11 Settings

11.11.1 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.

General

Format Count ☒ Pct ☒ Avg ☒ Decimals Multipunch

Source **Responses** **Weighting** **Hide chart** ☐

Crosstab

Layout **X totals** **Y totals**

Figure 222: General settings frame

Setting	Setting description
General	
Source	Indicates whether test or production data should be reported.
Format	Indicates whether count, percent, and/or average should be displayed. Average can only be displayed for weighted single punch or grid questions. See chapter 5.2.1.2 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 positive answers for a multi punch. Pos + Neg: Show numbers of positive and negative answers for a Multi question (answered/not answered) Ordered: Shows an ordered multi punch split in ranking.
Weighing	<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 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.
Y totals	Set this to ” Yes” to get the totals for a question under answer alternatives.

Table 60: 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 223: 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 224: Nested Crosstab

11.11.2 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.

11.11.2.1 Excel Chart Component

The following screenshots will be available for you if you choose Excel as the chart component in user settings. (See 3.2 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

Decimals Global setting

Multipunch Global setting

Ranking

Ascending
Descending

Figure 225: 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 226: 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).				
Ranking	You may choose to display the results of Ordered Multi questions in either Ascending or Descending order.				
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 Conformat. 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 Conformat. 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 chapter 5.2.1.2 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, e.g. bars or columns are placed next to each other, each category having its own legend.
Excel chart has table	The changes are invisible in Conformat. 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, e.g. 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 61: Excel chart component options

11.11.2.2 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 227: 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 62: PowerPoint options

11.11.2.3 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 228: Filter options

Filter options	
Setting	Description
Active filter	It is possible to set any of the defined filters active for one report element.

Table 63: Filter options

11.11.2.4 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 ☐ Excellent
 1 5

Figure 229: 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 5.2.1.2.
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 64: Answer mask/Scale mask options

11.11.2.5 Crosstab Options

The screenshot shows the 'Report node options' dialog box with the 'Crosstab' tab selected. Below the tabs, the 'Crosstab options' section contains three dropdown menus for 'Layout', 'X Totals', and 'Y Totals', all of which are currently set to 'Global setting'. At the bottom, there is an unchecked checkbox labeled 'Table content is average of first node'.

Figure 230: 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 65: Crosstab options

11.11.2.6 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 231: 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 232: 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 66: Loop options

11.12 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 be applied to pivot views as well (see chapter 11.15).

11.12.1 Create Iterated Report

A step-by-step overview of the workflow when creating an iterated report is presented in the steps 1 to 7 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

These steps are explained in the following chapters.

11.12.2 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 Chapter 11. 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.

11.12.3 Create Iterator and Define Iterations

Before a report iterator can be allocated to a report, the iterator has to 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 233: 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 pushed
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 67: 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 has to be entered. **Please note** that this has to be a question where the “Departments” list has been used.

To add iterations push the “Add” button. A row appears where list elements have to be added to create an iteration. One row for each desired iteration has to be added.

Iterator Properties			
Name		Iterator 2	
Use all list elements		☐	
Filter questions			
department			
Iterations			
Del	Id	Title English	department
☐	1		[Edit]
☐	2		[Edit]

Save
Add
Delete

Figure 234: 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	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 235: 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 236: 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 68: 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 push 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 237.

11.12.4 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 237: Report Properties

When and iterator has been selected in the dropdown box “Iterator:” and this is saved, a new field “Current iteration:” appears. See picture below.

Figure 238: 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 69: 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 has to be selected in this field. Then the preview of the report will display all iterations of the report.

11.12.5 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. (Please note that the iterators are using 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.)

To use the iterator as a filter can either be specified in each report node's properties page, or on the report's properties page. Highlight the report node or the report; enter the menu "Edit" -> "Properties" and open the tab "Filter", or you can also enter the *Properties* page by right clicking the object. The checkbox "Filter on report iterator" has to be checked to make the iterator work as a filter on this report node. See picture below.

The screenshot shows the 'Report node options' dialog box with the 'Filter' tab selected. Under 'Filter options', the 'Active filters in prod database' section has a checkbox for 'Filter on report iterator' which is currently unchecked. Below this, the 'Other filters' section shows a checkbox for 'CS' which is also unchecked.

Figure 239: 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 70: Fields in the Report Node's Properties Page

To use the iterator as a mask on a report node this has to be specified in the "Masks" tab in the report node's properties page. An iterator has to be selected in the dropdown box "Iterated report mask". See picture below.

The screenshot shows the 'Report node options' dialog box with the 'Masks' tab selected. Under 'Answer mask', the 'Iterated report mask' dropdown menu is set to 'department'. Below this, the 'Show all answers' checkbox is checked. The 'Show these answers:' section shows three unchecked checkboxes for 'MS Word', 'MS Excel', and 'MS PowerPoint'.

Figure 240: 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 5.2.1.2
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 71: Masks Tab of a Report Node's Properties Page

11.12.6 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.

The screenshot shows a dialog box titled "Pivot View Properties". It contains three input fields: "Name" with the value "Pivot View 1", "Title" with the value "English", and "Iterator" with a dropdown menu showing "Departments". A "Save" button is located at the bottom right of the dialog.

Figure 241: 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 72: 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 14).

The screenshot shows a dialog box titled "Pivot View Form 'use' Properties". It contains a dropdown menu labeled "Iterated report mask" with the value "department" selected. A "Save" button is located at the bottom right of the dialog.

Figure 242: 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 73: Fields in Pivot View Form Properties Window

11.12.7 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.

Figure 243: 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 74: Fields in the Export Properties Window

The Confirmit Office report task numbers will also include the precodes of the iterators.

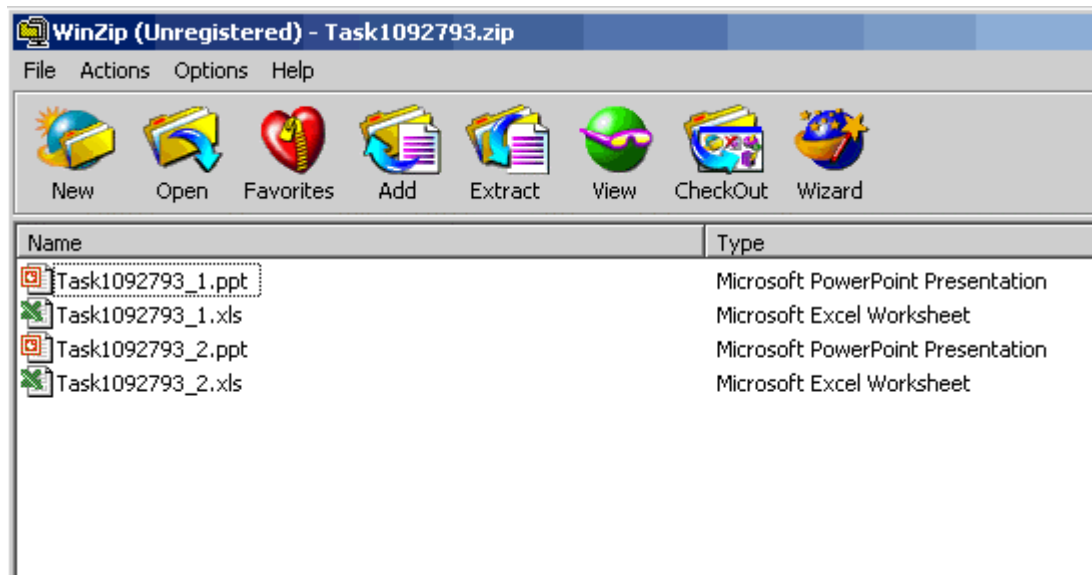


Figure 244: Iterator Precodes

11.12.8 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 has to be checked and this has to 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. Please read more about this in chapter 14.

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 Confirmit end user environment, users can be allocated access to specific iterations of this report. Please read chapter 14 for more information regarding how to allocate reports to specific users and chapter 15 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.

The screenshot displays the Confirmit web interface for managing reports. At the top, there are 'Delete' and 'Save' buttons. Below them is a table with columns: Report no, Report name, Report type, Project id, Project name, DB, and Active. A search bar is on the right. The table contains one entry: Report no 1, Report name Example Report, Report type Published Report, Project id p0002008, Project name 2Individual/Iterated/Pivot Reporting, DB prod, and Active checked.

Below the table is a section titled 'Example Report (1)' with tabs: Details, Users, Groups, and Companies. The 'Details' tab is selected, showing the following configuration options:

- Report no: 1
- Default language: English (dropdown)
- Template: confirmit default (dropdown)
- Protected: ☒
- Active: ☒
- Test database: ☐
- Created by: user
- Link: http://localhost/customer/publisher/r.asp?instance=1&l=<lang>&iteration=<iter>
- Scheduling: [Change](#)
- Published Report: [View](#)
- Run now: ☐
- One page: ☐
- Send email: Do not send (dropdown)
- Email:
- Status: Not run
- Last run:

A 'Save' button is located at the bottom of the 'Details' section.

Figure 245: Publishing Iterated Reports

Please read the Enduser administration chapter of this manual for more information regarding the end user interface.

11.12.9 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 does always display real time data. If a pivot view has been edited, the published pivot view is updated by pushing 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 push “Details”. Please see chapter 11.15 for more information about these pages.

The pivot view has to be connected to users before they (the users) have access to it.

11.12.10 Connecting Users to Reports/Pivot Views

When an iterated report or pivot view has been published, it has to 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 has to 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 on the “Save” button. See picture below.

The screenshot displays the 'End Users Lists' management interface. At the top, there are 'Delete' and 'New' buttons. Below them is a table with the following columns: Name, Template, Creator, Created, and Active. A single row is shown with the name 'UserManualList', template 'confirmit default (blue)', creator 'Manual, User', and created date '01.jun.02'. To the right of the table is a 'Search' button. Below the table, there is a section titled 'UserManualList' with a 'Details' tab. The 'Details' section contains the following information:

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

At the bottom of the 'Details' section are 'Save' and 'Activate' buttons.

Figure 246: 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.

The screenshot shows the top section of a web application. At the top is a blue header bar with the text 'Companies'. Below this is a light gray bar containing 'Active list: UserManualList' on the left and 'p0002008' on the right. Underneath are two blue buttons: 'Delete' and 'New'. Below these buttons is a search bar with a blue header containing a small square icon, 'Company no', and 'Company name'. The search bar has a text input field and a blue 'Search' button on the right.

Figure 247: 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 push “Save”. See picture below.

This screenshot shows the 'Company Details' page. The top section is identical to Figure 247. Below the search bar is a horizontal bar with three tabs: 'Details' (which is active and highlighted in blue), 'Reports', and 'Users'. Below the tabs is a form titled 'Details' with a blue header. Inside the form, there are two labels: 'Company no' and 'Company name'. The 'Company name' label is followed by a text input field containing the text 'Company1'. Below the input field is a blue 'Save' button.

Figure 248: Company Details

When a company is entered go to “Users” which is also found under “Endusers” in the main menu. A list has to 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

Figure 249: 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

Figure 250: 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 251: 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	
☐	1	User1	Some One	someone@somewhere.com	Company1	Search

User1

Details

Reports

Groups

Delete

Add

☐	Report no	Report name	Report type	Project id	Project name	DB

Figure 252: Reports for a User

To connect this user to a report, push 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

☐	User no	User id	Name	Email	Company
☐	1	User1	Some One	someone@somewhere.com	Company1

User1

☐	Report no	Report name	Report type	Project id	Project name	DB
☐	Iterations 1	Example Report	Published Report	p0002008	2Individual/Iterated/Pivot Reporting prod	

Figure 253: Report List

Highlight the report you want to connect to the user and push “Save” and “Close”. The selected report is entered as a row in the “Reports” frame. Highlight this row and push 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.

Active list: UserManualList p0002008

☐	User no	User id
☐	1	User1

User1

☐	Report no	Report name	Report type	Project id	Project name	DB
☐	Iterations 1	Example Report	Published Report	p0002008	2Individual/Iterated/Pivot Reporting prod	

(Title is undefined) -- Web Page Dialog

ReportIterations

Available

- 1-Sales&Marketing
- 2-Accounting&Administration
- 3-CS&RD
- 4-Marketing
- 5-Sales

Selected

>>
 <<

http://firm-ws-100/confirm/admin/endusers/reportiterati Local intranet

Figure 254: Report Iterations

- Fields in the Report iterations window

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 75: Fields in the Report Iterations Window

Highlight the iteration that you want to give the user access to, push the arrow to move it over to the “Selected” frame and push 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 has to be sent to them.

Users may have access to several reports through the end user login functionality. Please read more about this functionality in the chapter 15.

11.13 Report Publisher for Users Who do not Have Access to Advanced Reporting

11.13.1 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 chapter 11.4. 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 User Manual chapter 11.13. 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 Both

Title Only chart

Text Only table

None

Norwegian

Title

Text

Copy PowerPoint texts

Figure 255: 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* fro 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 256: 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 3.6 Task Management.
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 3.8 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 FIRM engine normally runs every 5 minutes).
Delete	Allows to delete a published report
Remove	The report is being removed from the web.

Table 76: 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**: Conformat 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.

The screenshot shows a web-based interface for configuring a batch job. At the top, there's a header 'Task settings' in blue. Below it, a grey bar contains the text 'Configuration of a batch job.' and the job ID 'p0001001'. The main content area has a blue header 'Recurrence pattern' and three tabs: 'Properties', 'Recurr', and 'Instances'. The 'Recurr' tab is active. Below the tabs, there's a section 'Current settings' with a grey background. It displays 'Current settings' and 'Initial start time = 01.06.2002 16:40:31'. At the bottom of this section is a blue 'Change' button.

Figure 257: 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.

Recurrence pattern	
Properties	Recurr
Current settings Initial start time = 01.06.2002 16:40:31 Change	
New start time	☐ Disable task (clear queue) ☒ ASAP ☐ 0:00 1 6 2002
Recurring task	Yes
Recurrence pattern type	☒ Hourly ☐ Daily ☐ Weekly ☐ Monthly
Range of recurrence	☒ No end date ☐ End by: 30 12 2002
Hourly schedule	Every 2 hours
Save	

Figure 258: 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.

Type	Value	Delete
Cryptic link	Links for each language	☐
<Select one>		☐

<Select one>
 Email
 Cryptic link
 Protected link

Save Add Del

Back

Figure 259: Targets

NB! 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.

11.13.2 Changing a Report after Publishing

The report in the Report Folder is the source of the published report. So if you e.g. 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.

11.13.3 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.

11.14 Matrix Views

11.14.1 Introduction

A matrix view is mainly a Conformat 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 77: Matrix view question sets

11.14.2 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.

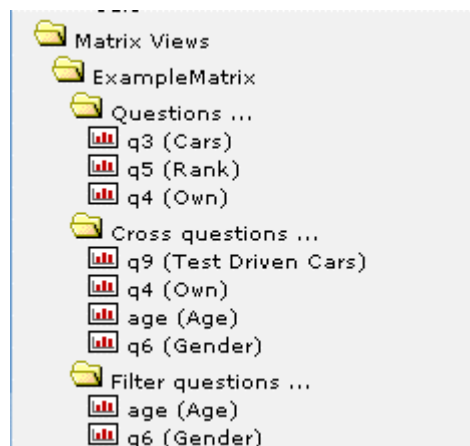


Figure 260: Matrix view configuration

11.14.3 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.

NB! 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 “ <i>Filters</i> ”-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 “ <i>Display</i> ”-option.
Change format	Format can be switched between count, percent and index (average) by changing the “ <i>Format</i> ”-option.
Change matrix size	Changing the “ <i>Screen</i> ” -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 “ <i>Timeseries</i> ”-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 e.g. 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 78: Matrix view operations

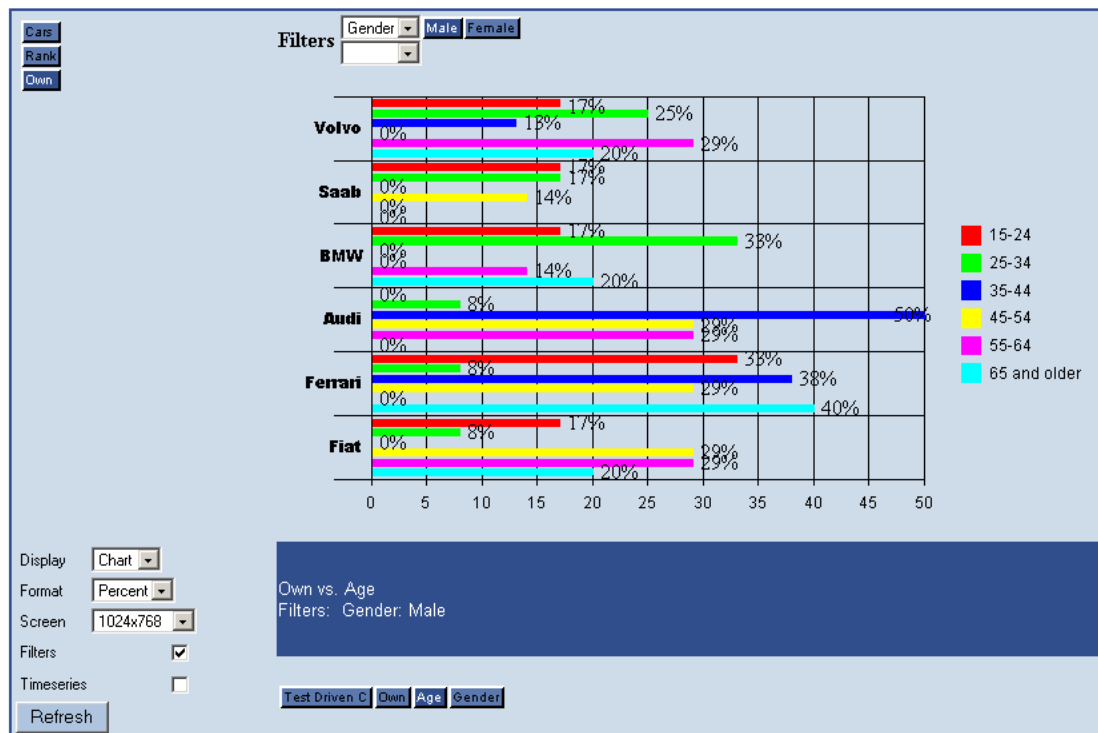


Figure 261: Matrix view

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 has to 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 chapter 5.2.1.2 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.

11.15 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. Please read the *Iterated reporting* chapter 11.12. for more information about iterators and iterated reporting.

11.15.1 Create Pivot View in Report Tree

This chapter will describe 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.

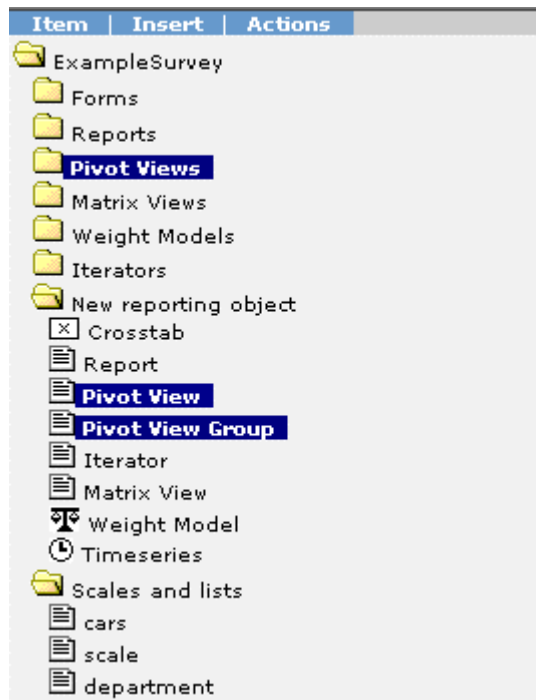


Figure 262: Pivot View in Online Reporting

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.

Pivot View Properties	
Name	Cars
Title	
English	Cars
Norwegian	Biler
Iterator	
Save	

Figure 263: 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.

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.

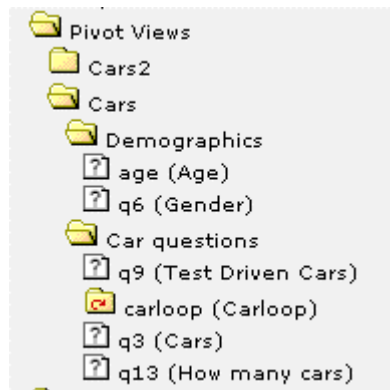


Figure 264: Building a Pivot View

11.15.2 To Connect Iterator to Pivot View

It is possible to connect an iterator to a pivot view. This chapter 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” chapter. However, to publish an iterated report does not involve any more steps than these described in this chapter, 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 chapter are not from the Car survey).

Figure 265: 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 266: Pivot View Form Properties

11.15.3 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 (please note that in these pictures the pivot view has been published in test mode, that is why it says “yes” in the test field and the *Test database* is checked).

Reports

Active list: UserManualList

p0001001

Delete

Save

☐	Report no	Report name	Report type	Project id	Project name	DB	Active
☐	2	Cars	Pivot View	p0001001	ExampleSurvey	prod	☒

Search

Figure 267: 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, please read chapter 14.

Click on the *Details* tab. See picture below.

Cars (2)

Details

Users

Groups

Companies

Details

Report no

2

Default language

English

Template

confirmit default

Protected

☒

Active

☒

Test database

☐

Created by

user

Published view

Update

Pivot View

View

Save

Figure 268: 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.

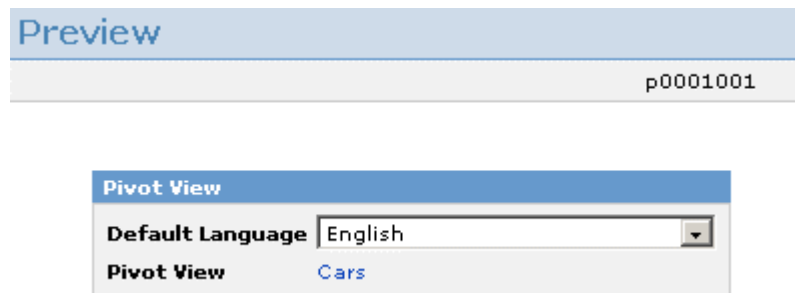


Figure 269: Entering Pivot View in Preview Mode

Click the link (*Cars*) and the pivot view screen is opened.

11.15.4 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.

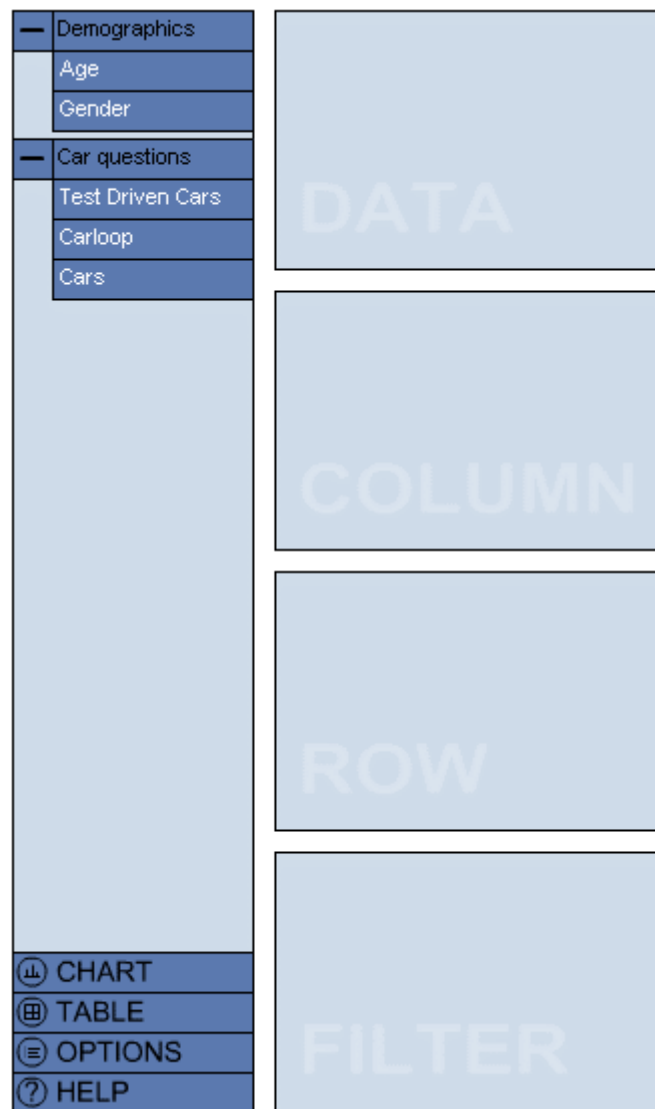


Figure 270: Overview

11.15.5 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 make use of the hotkeys, the left frame has to be the active one. You have to click somewhere in the left frame to make it active, if hotkeys are not working.

11.15.6 Application interface (left frame)

The menu can contain one or more *pivot groups*, which in their turn contain one or more *items*. See Figure 257 below.

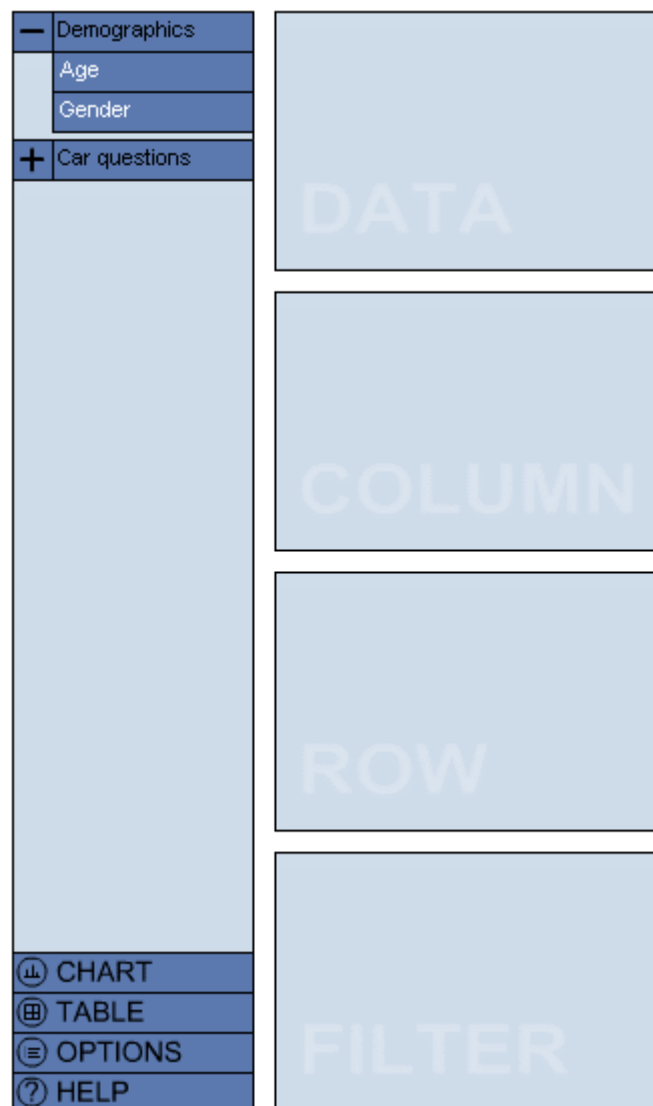


Figure 271: Overview Expanded

The next figure shows the appearance after items has been dragged from the top half of the menu and into the different containers:

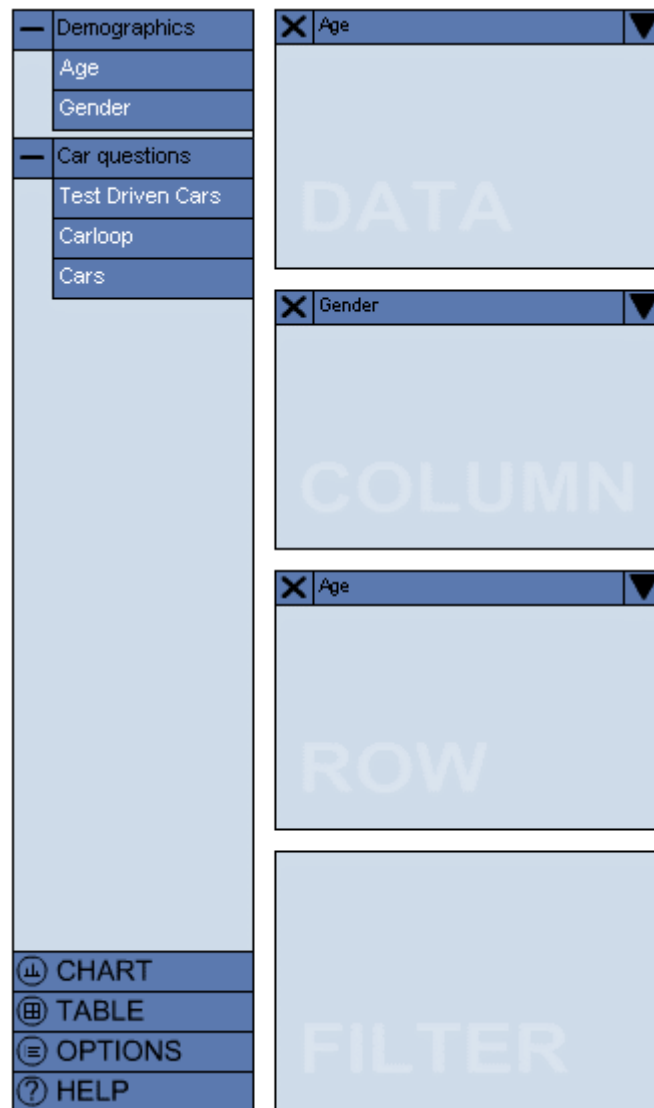


Figure 272: Overview - Containers

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. This is explained in the subchapter below called “Options”.
- **Help:** Displays a help page in the right frame.
- **Containers:** Four containers that can contain items from the groups.

There are some symbols that 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.
-  - This arrow 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.)
-  - This arrow brings you to the end of the alternative list for the item.
-  - This arrow brings you one alternative backwards.
-  - This arrow brings you to the start of the alternative list for the item.

11.15.6.1 Groups

There can be several groups in the interface. Each group may contain many items. Open the groups by clicking the  symbol at the left of the group name; this will reveal the underlying items. To hide the items for a group, click the  symbol.

11.15.6.2 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 Conformat published reports.

11.15.6.3 Table

Clicking *table* will produce a table in the right frame based on the items in the different containers.

11.15.6.4 Options

When the options menu item is clicked, an options page will appear in the right frame (see figure248 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

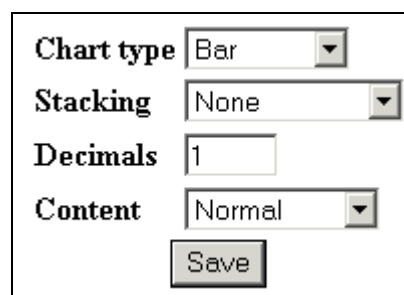


Chart type	Bar
Stacking	None
Decimals	1
Content	Normal
Save	

Figure 273: 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.)

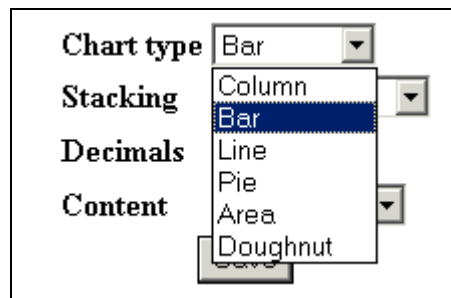


Figure 274: Chart Type Options

- **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.)

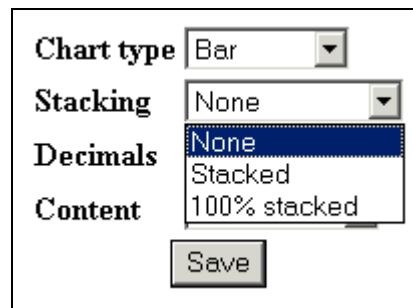


Figure 275: Stacking Options

- **Decimals:** Choose the number of decimals to use.
(This option applies to both charts and tables.)

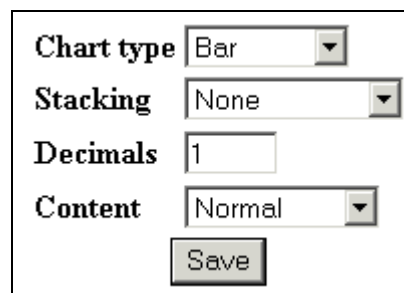


Figure 276: Options

- **Content:** Sets the percentage based on the data in rows or in columns.
(This option only applies to tables.)

Figure 277: Content Options

11.15.6.5 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:

11.15.6.5.1 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 e.g. 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.

11.15.6.5.2 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).

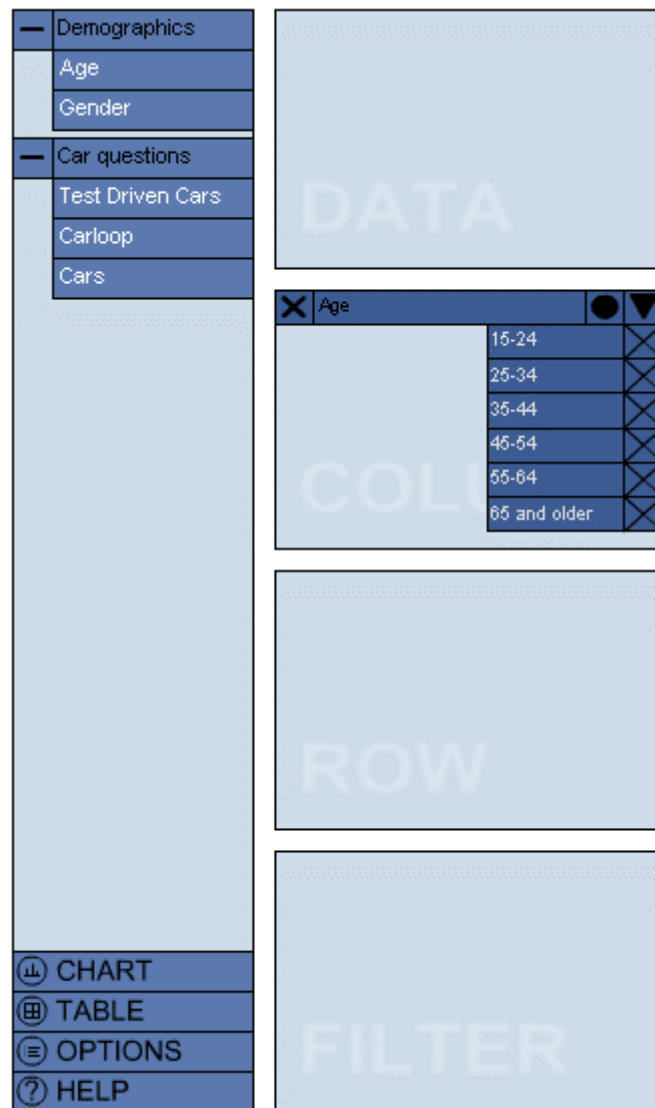


Figure 278: Content Options

11.15.6.5.3Row

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 (see chapter 11.5.5.2 above).

11.15.6.5.4Filter

The elements here are used as filters for the result in the right frame. The following figure shows how you filter e.g. two elements in a list of many elements:

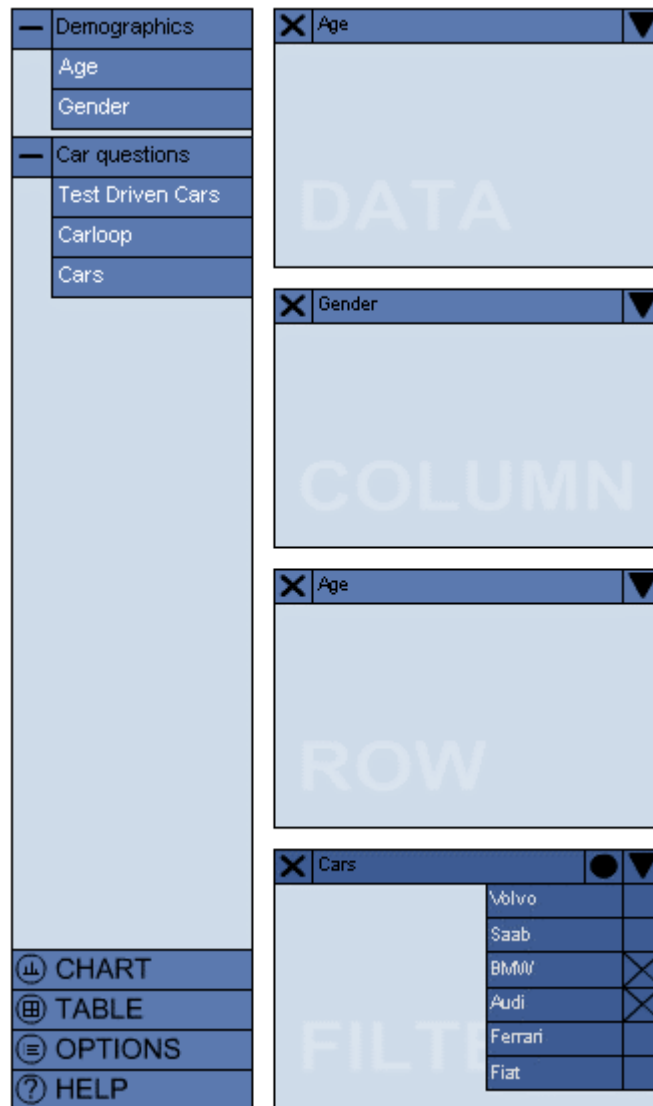


Figure 279: Filter

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.

11.15.7 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 subchapters explain how to use the different elements in the different containers.

11.15.7.1 Use of items in the Data container

The following items can be used in the data container:

- Time series.
- Single.

- Multi.
- Single elements from a grid.
- Open, numeric.
- Open float (recoded).
- Loop.

Note: Loops can be used in the data container, but may show a higher count because the data is fetched 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 280 below).

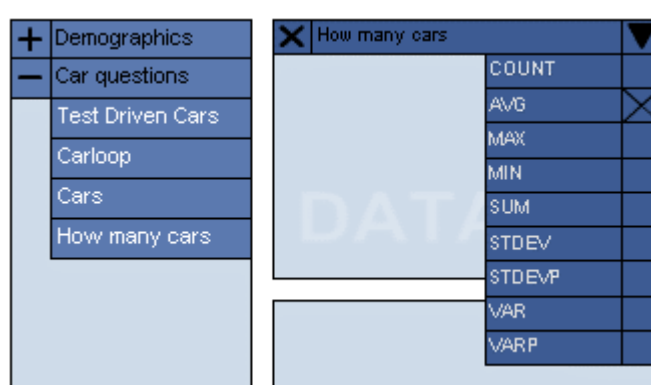


Figure 280: Data Options

Choosing the different types will generate different results in the right frame.
Description of the different types:

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 79: Description of Data Types

An 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.

11.15.7.2 Use of items in the Column, Row and Filter containers

The following items can be used in the column and row containers:

- Time series.
- Single.
- Multi.
- Single elements from a grid.
- Loop.

Note:

Time series will produce different alternatives than the other item types when placed in a container. Clicking the  symbol will give you the days, weeks, months, quarters or years – based on what granularity you have chosen for the time series.

11.15.8 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.

11.15.8.1 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.

An 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.

12 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.

12.1 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'.

12.1.1 SQL

For SQL based variables, any legal SQL Server primitives can be used within the expressions. Hence it is recommended to know some SQL to create advanced expressions.

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 a 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

<i>Complete</i>	<i>status='complete'</i>	<i>c</i>
<i>Incomplete</i>	<i>status is null</i>	<i>i</i>
<i>Error</i>	<i>status='error'</i>	<i>e</i>
<i>Quota full</i>	<i>status='quotafull'</i>	<i>q</i>

Observe 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

12.1.2 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: $(p1 + p2 + \dots + pN)/N$ 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.

q17 -

Text Answers Properties Preview Tracking Languages Save

Answers

English	Norwegian	Expression	Precode	Weight
Young		age==1 age==2		
Middle		age==3 age==4		

Add Clear Delete rows Save

Condition builder

Column	Operators	Legal values
age	==	15-24 [1]
	!=	25-34 [2]
	<	35-44 [3]
	<=	45-54 [4]
	>	55-64 [5]
	&&	65 and older [6]
	!	
	parseInt	
	date(	
	average	
	.ln(	

Figure 281: Variable definition with condition builder

13 Individual Reporting

NB! For some of our customers, the Individual Reporting functionality will be subject to payment based on usage. The Wysiwyg HTML editor in Single View requires browser IE 5.5 or 6.0.

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 282: Example of an individual report .

The screenshot shows a web interface for individual reporting. At the top, there's a search bar with the text "Name and department" and a "Use" button. Below it, there's a "High user level Word" section. The search criteria are: Name: *Jo, Department: Sales (selected from a dropdown menu). The results are displayed in two columns. The left column shows a list of results with columns #, Name, and Department. The right column shows a detailed view of the selected result (Alan Jones) with columns Name, Department, Use, and User level.

#	Name	Department
1	Alan Jones	Marketing
2	John Smith	Sales

Name	Department	Use	User level
Alan Jones	Marketing	MS Word x	MS Word 4
		MS Excel x	MS Excel 1
		MS PowerPoint x	MS PowerPoint 5
			Beginner Expert

Figure 282: 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.

Figure 283: 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 284: 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
	MS PowerPoint	5 Expert

Figure 285: 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 need to 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.

13.1 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.

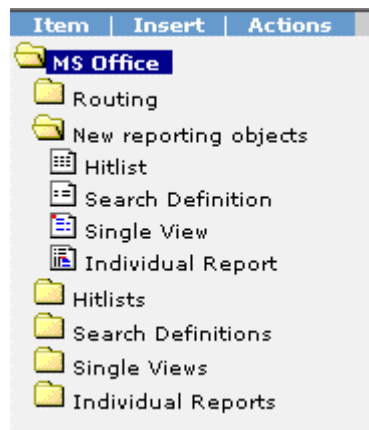


Figure 286: Individual Reporting Tree

13.2 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.

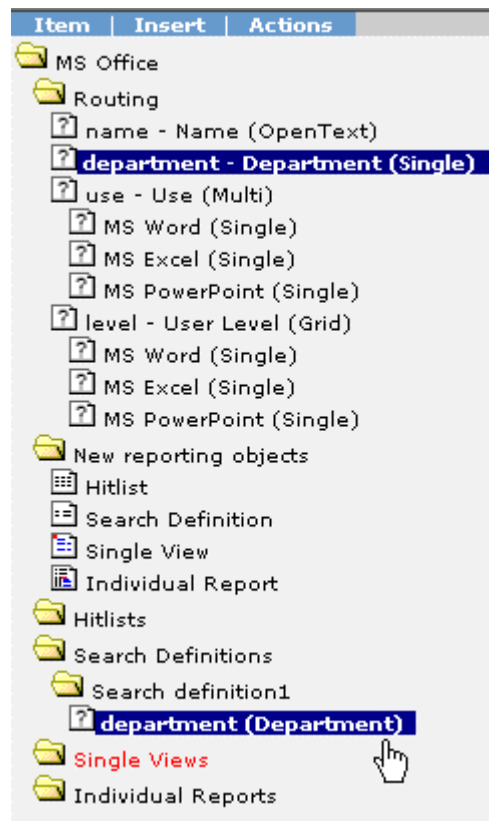


Figure 287: Dragging questions into a New Search Definition. Observe that the routing is expanded and that the multi "use" and grid "userlevel" is expanded into single question items.

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.

13.2.1 General

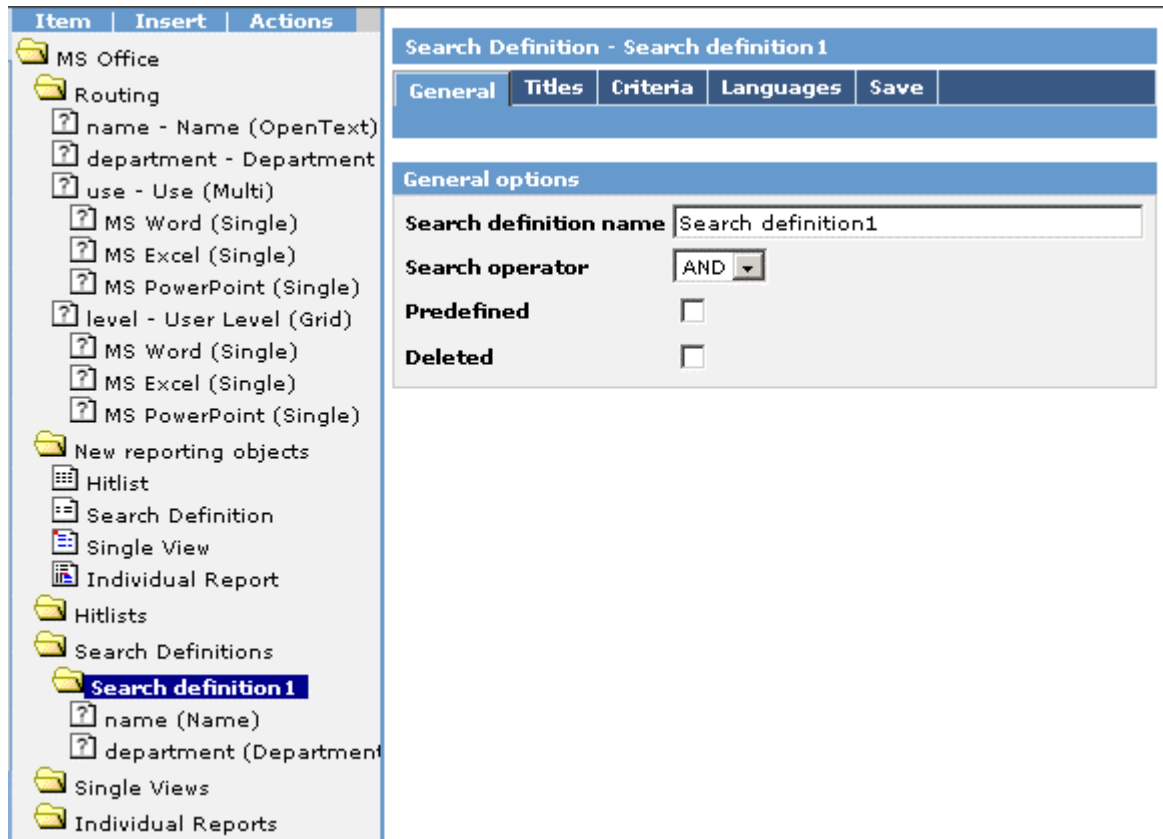


Figure 288: Search Definition Properties - General

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 has to 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 80: Search Definition Properties

13.2.2 Titles

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.

13.2.3 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 289: 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 81: Criteria Properties

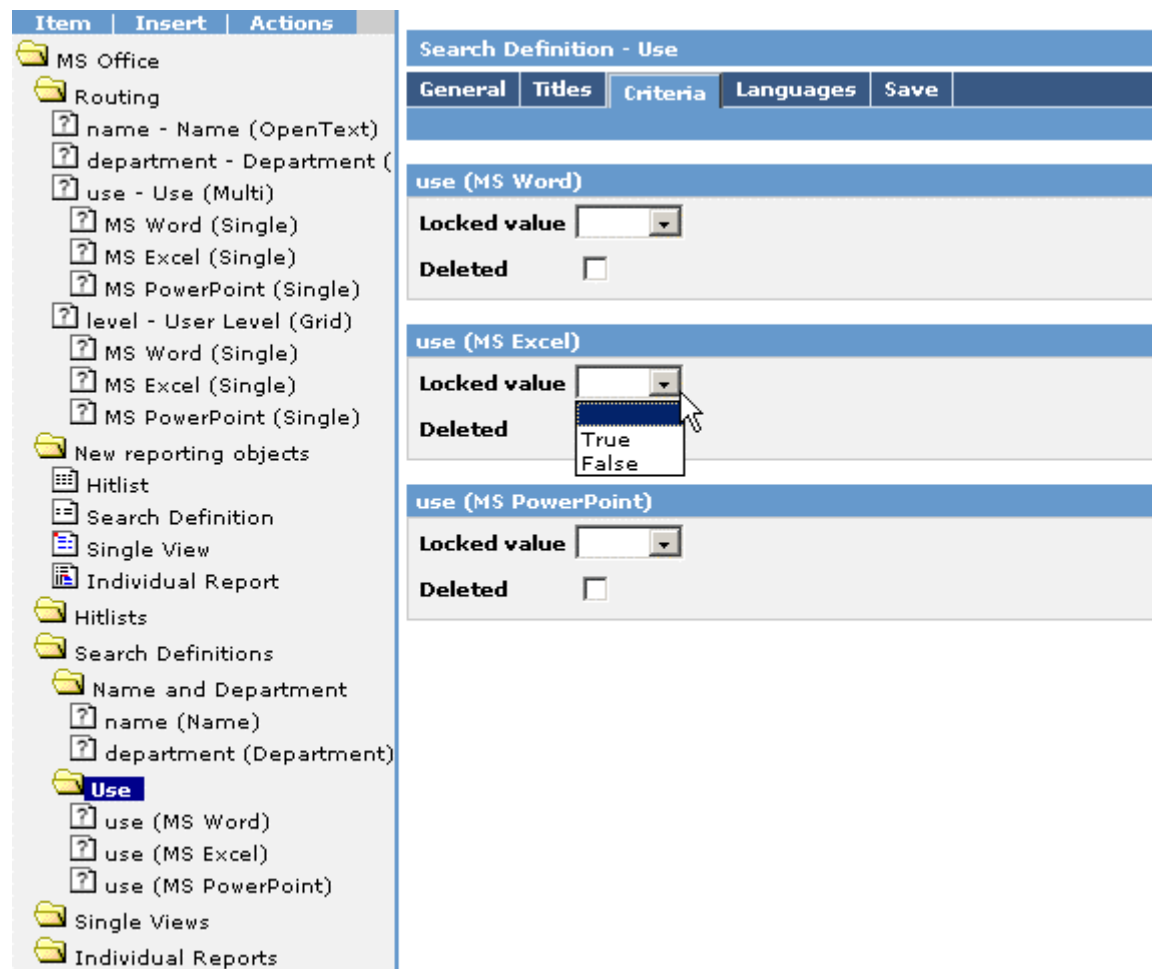


Figure 290: Search Definition Properties: Criteria for multi question

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 82: 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:

Search Definition - High User Level Word

General Titles Criteria Languages Save

level (MS Word)

Locked scale value(s) ☐ 3 ☒ 4 ☒ 5 Expert

Multiple choice ☐

Deleted ☐

Figure 291: 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 83: Locked Values 2

13.2.3.1 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.

Search Criteria - department (Department)

General Titles Languages Save

General options

Locked value(s) ☐ Sales ☐ Marketing ☐ Accounting

Multiple choice ☒

Deleted ☐

The screenshot shows a software window titled "Search Criteria - department (Department)". It features four tabs: "General", "Titles", "Languages", and "Save". The "Titles" tab is currently active, displaying a text input field with the text "Department" entered. The "General" tab is also visible, showing a label "English" next to an empty input field.

Figure 292: 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 84: Search Criteria Properties

13.2.4 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.

13.3 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.

13.3.1 General

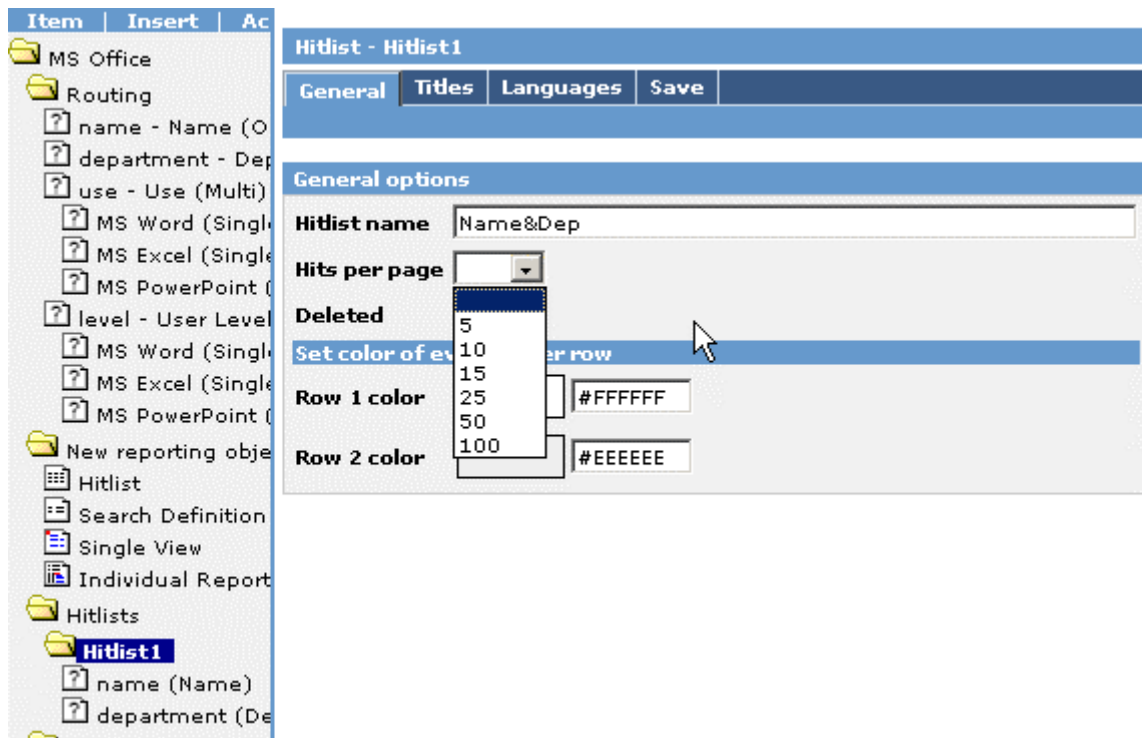


Figure 293: Hitlist properties – General

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 85: Hitlist Properties

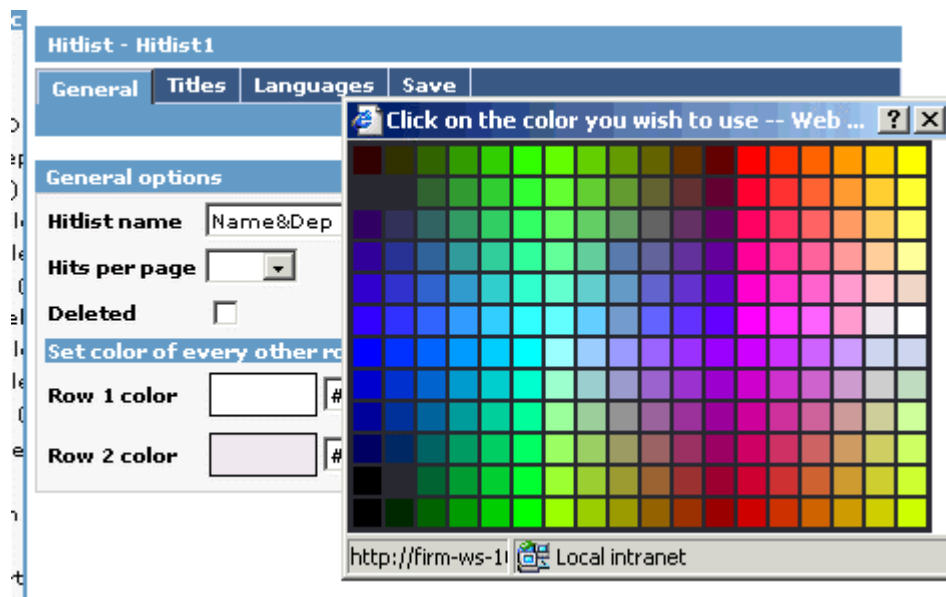


Figure 294: Hitlist properties – General – Color chooser

13.3.2 Titles

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.

13.3.3 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.

13.3.4 Hitlist columns

If you doubleclick the questions inside the hitlist folder you can edit the settings for the columns of the hitlist.

13.3.5 General

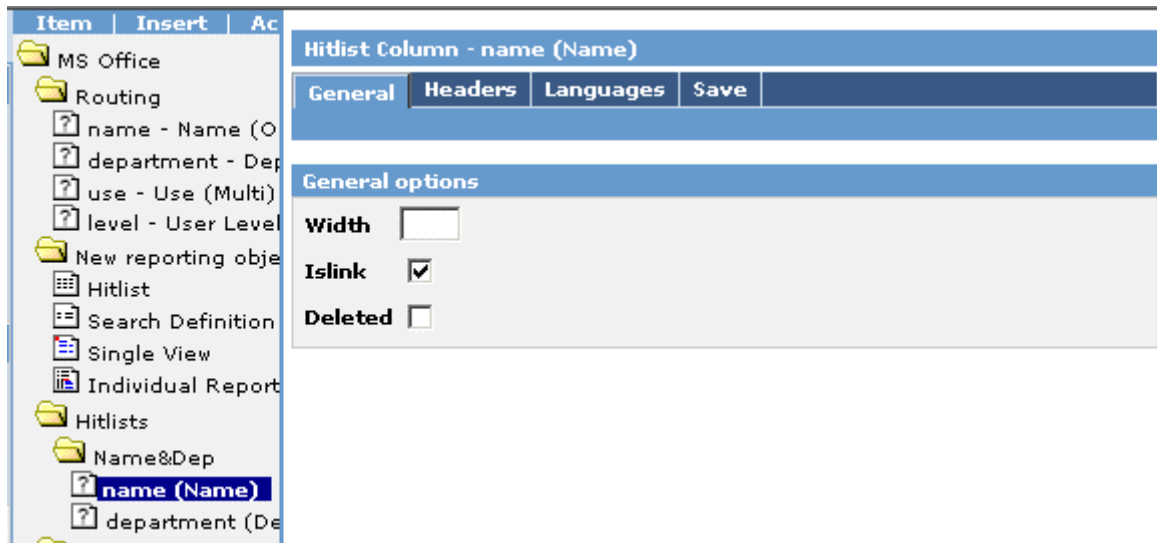


Figure 295: Hitlist Column properties – General

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 86: Hitlist Column Properties

13.3.6 Headers

Here you can define the texts for the headers of the columns in the hitlist for the active languages.

13.3.7 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.

13.4 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 296: 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 87: 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

Figure 297: 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 88: Single View Wizard Fields

13.4.1 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.

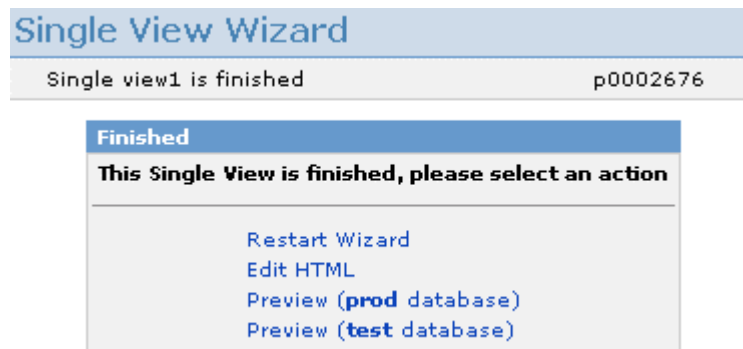


Figure 298: Single View Wizard Menu

Clicking on Edit HTML link will bring you to the Single View Editor.

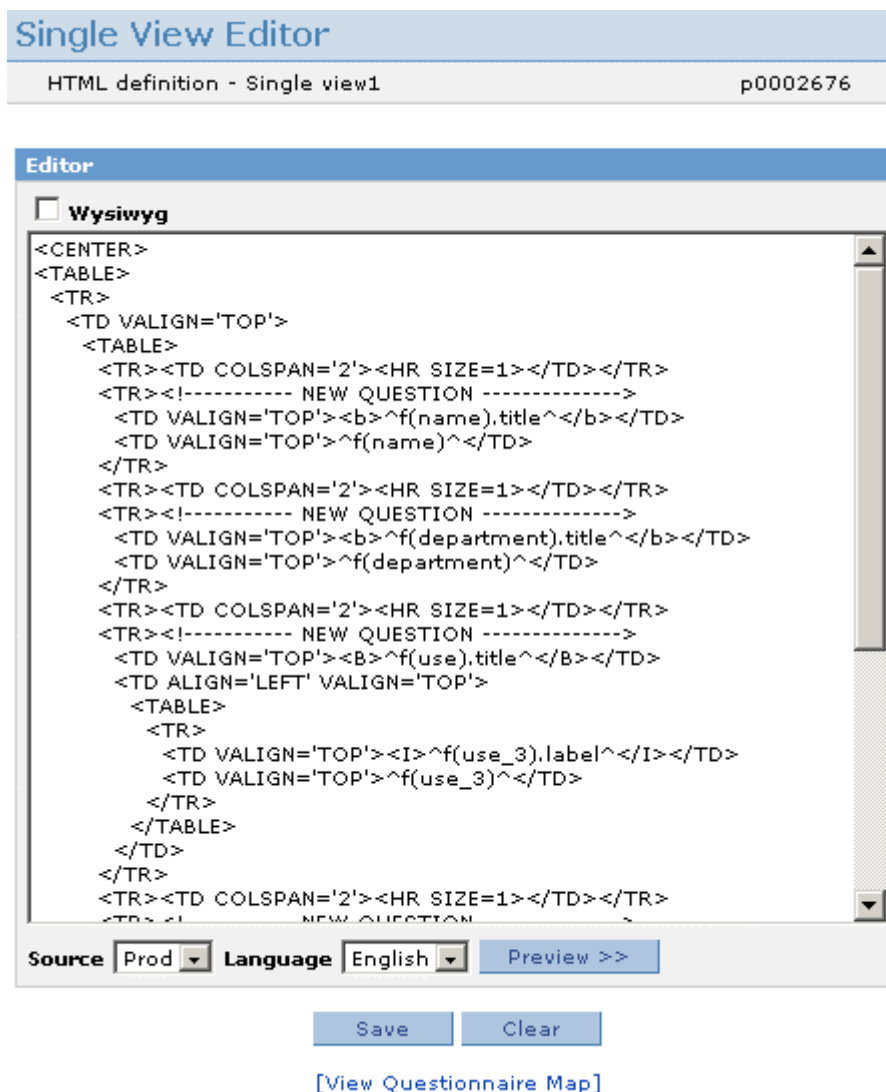


Figure 299: Single View Editor

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 89: Single View Editor Properties

When the Wysiwyg checkbox is activated, the Single View Editor will be displayed like the picture below.

Single View Editor

HTML definition - Single view1
p0002676

Editor

☒ **Wysiwyg**

--size--
--font name--

^f(name).title^ ^f(name)^

^f(department).title^ ^f(department)^

^f(use).title^ ^f(use_2).label^ ^f(use_2)^
^f(use_3).label^ ^f(use_3)^
^f(use_1).label^ ^f(use_1)^

^f(level).title^ ^f(level_2).label^ ^f(level_2)^
^f(level_3).label^ ^f(level_3)^
^f(level_1).label^ ^f(level_1)^

Source Prod
Language English
Preview >>

Save
Clear

[\[View Questionnaire Map\]](#)

Figure 300: Single View Editor – Wysiwyg

13.4.2 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, e.g. ^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 questionnairep0002676

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

Select all

Unselect all

Generate HTML

Close

Figure 301: 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 90: Questionnaire Map Properties

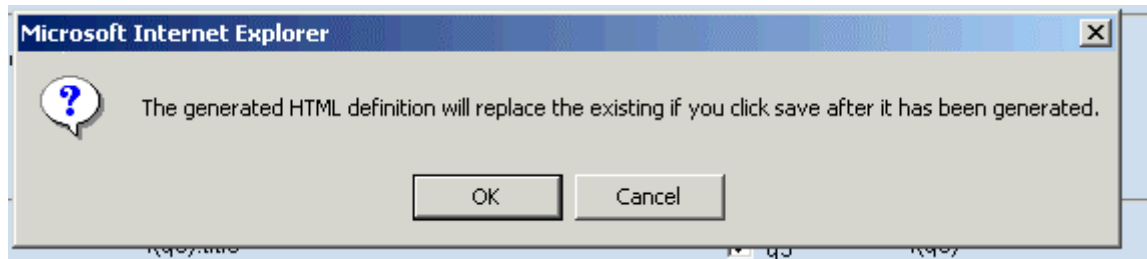


Figure 302: HTML Definition Warning

13.4.3 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	p0002676	
<<		
Name	John Smith	
Department	Research and Development	
Use	<i>MS Excel</i> x <i>MS PowerPoint</i> x <i>MS Word</i> x	
User Level	<i>MS Excel</i> 5 Expert <i>MS PowerPoint</i> 4 <i>MS Word</i> 4	
<<		

Figure 303: 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.

13.5 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.

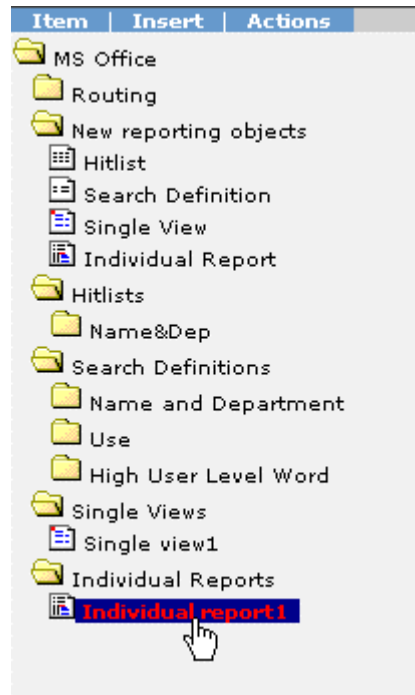


Figure 304: Adding a New Individual Report

13.5.1 Individual Report Wizard

Individual Report Wizard

p0002676

STEP 1 - Select reporting objects

Individual Report Name Individual report1

Search Definitions

Available		Selected
Name and Department	>>	
Use	<<	
High User Level Word		

Hitlist (None)

Single View (None)

Deleted ☐

Cancel < Back Next > Finish

Figure 305: 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.

13.5.1.1 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.

Figure 306: Individual Report Wizard Step 1 - Select reporting objects

13.5.1.2 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.

Figure 307: Individual Report Wizard Step 2 - Set title for each language

13.5.1.3 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 91: 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 308: Individual Report Wizard Step 3: Select layout and set properties

13.5.1.4 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

Image URL

Cancel

< Back

Next >

Finish

Figure 309: 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 310: Individual Report Wizard Step 4: Set properties for each frame (Hitlist)

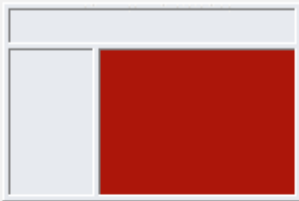
The size of the frame will automatically update when you select size. Frames on the same axis have to add up to 100%, so changing one of them will update the other.

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

Image URL

Cancel

< Back

Next >

Finish

Figure 311: 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.

13.5.2 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 go through the steps from last chapter with your previous settings. You can exit the wizard by clicking "Finish".

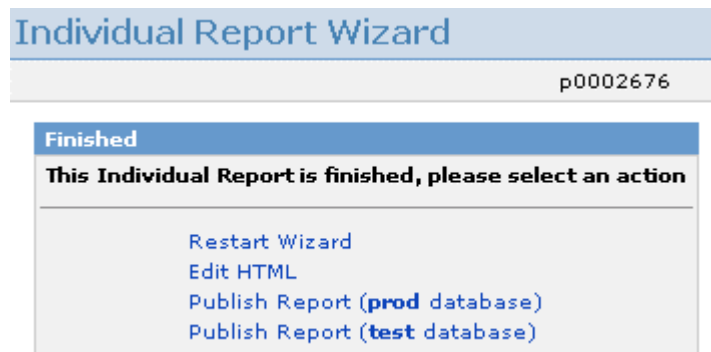


Figure 312: Finished Report

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 92: 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.

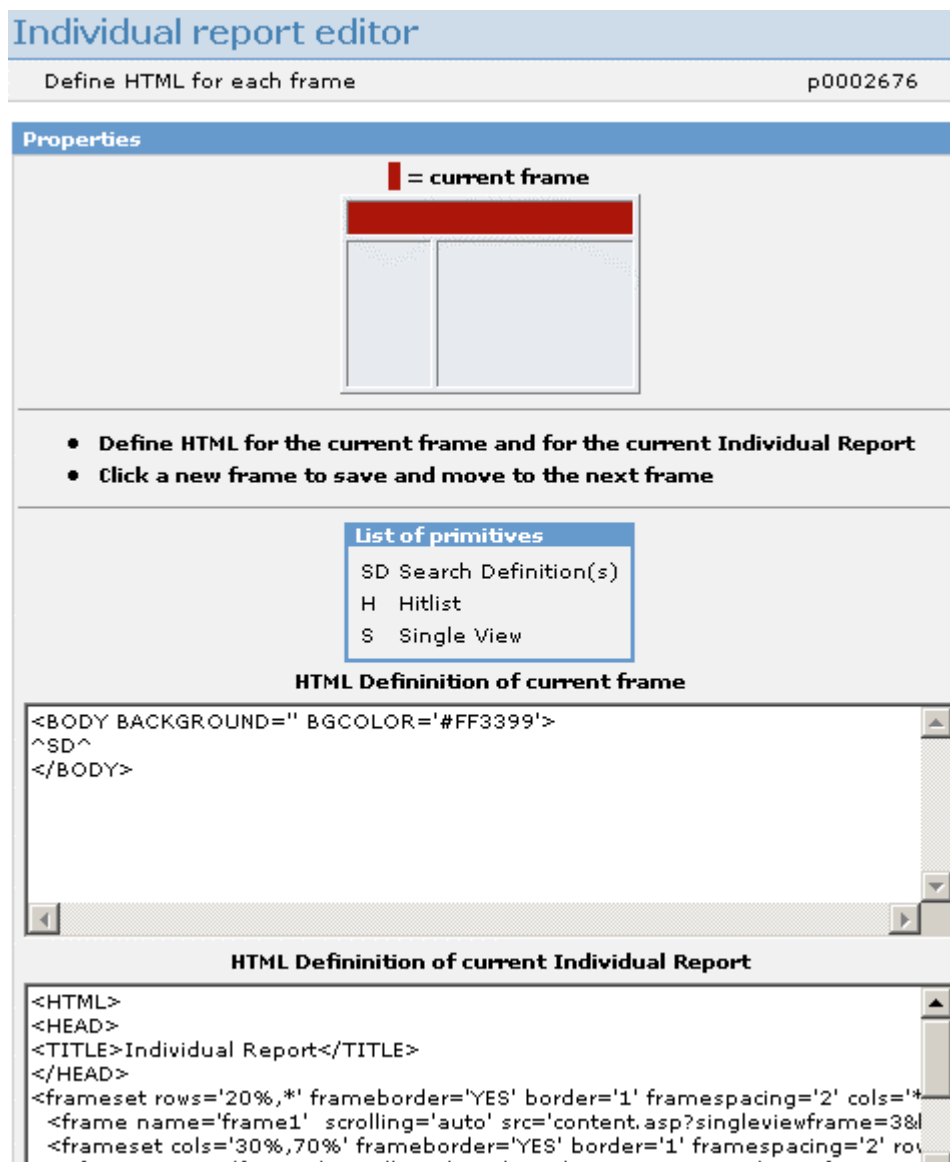


Figure 313: Individual Report Editor

13.6 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.

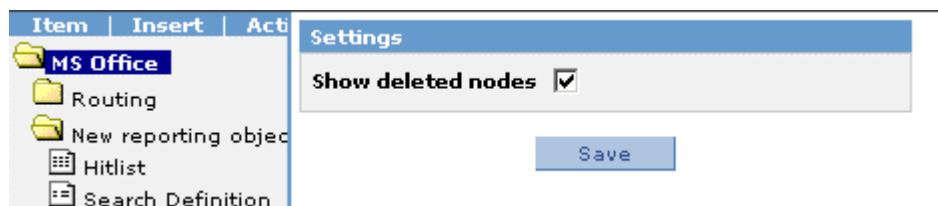


Figure 314: Show deleted nodes

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. **NB! If you delete an item, which is gray (the "deleted" property is set) it will be permanently deleted.**



Figure 315: Restoring a deleted item

13.7 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 15).

13.8 Individual Reporting User Interface

The screenshot displays a web-based search interface. On the left, there are three tabs: 'Name and department' (selected), 'Use', and 'High user level Word'. The main search area is titled 'Name and department' and contains a 'Name' field with the text '*Smith' and a 'Department' dropdown menu with 'Sales' selected. Below the search area, there is a 'Result (1)' section. It contains a table with one row: '#', 'Name', 'Department', and '1 John Smith Sales'. To the right of the table, there is a detailed view of the selected result, showing 'Name: John Smith', 'Department: Sales', 'Use: MS Word x, MS Excel -, MS PowerPoint x', and 'User level: MS Word 4, MS Excel 1 Beginner, MS PowerPoint 3'.

#	Name	Department
1	John Smith	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 316: 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 has to be satisfied) or OR (meaning that just one of them have to be satisfied.)

Name and department

Use

Name

Department Sales Marketing Accounting

Result (2)

#	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 317: Search with OR

13.8.1 Open Text search

Name

Figure 318: 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.

13.8.2 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.

Department Sales Marketing Accounting

Figure 319: Multiple choice search

13.8.3 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 320: Single choice search

13.8.4 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).

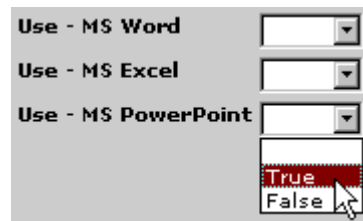


Figure 321: Search on items in a multi question

13.8.5 Predefined Search

When selecting a predefined search, the result is directly displayed in the hitlist.

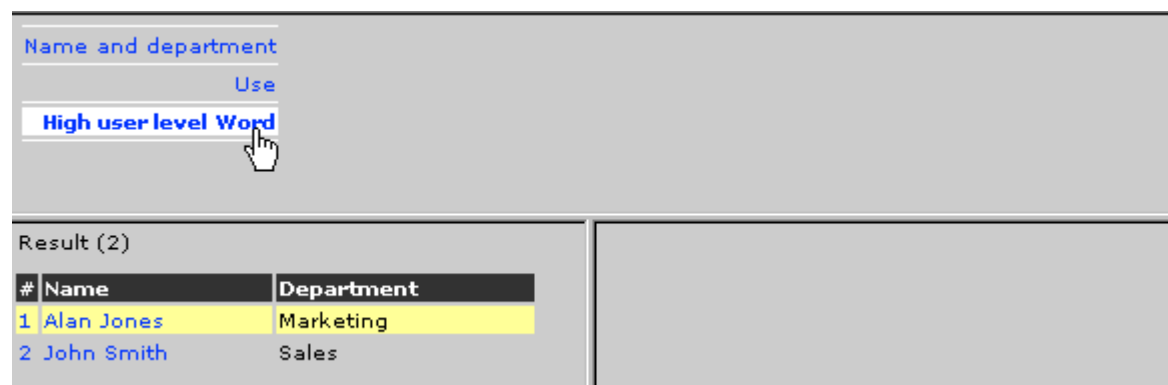


Figure 322: Predefined search

13.8.6 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.



Figure 323: Sorting the hitlist

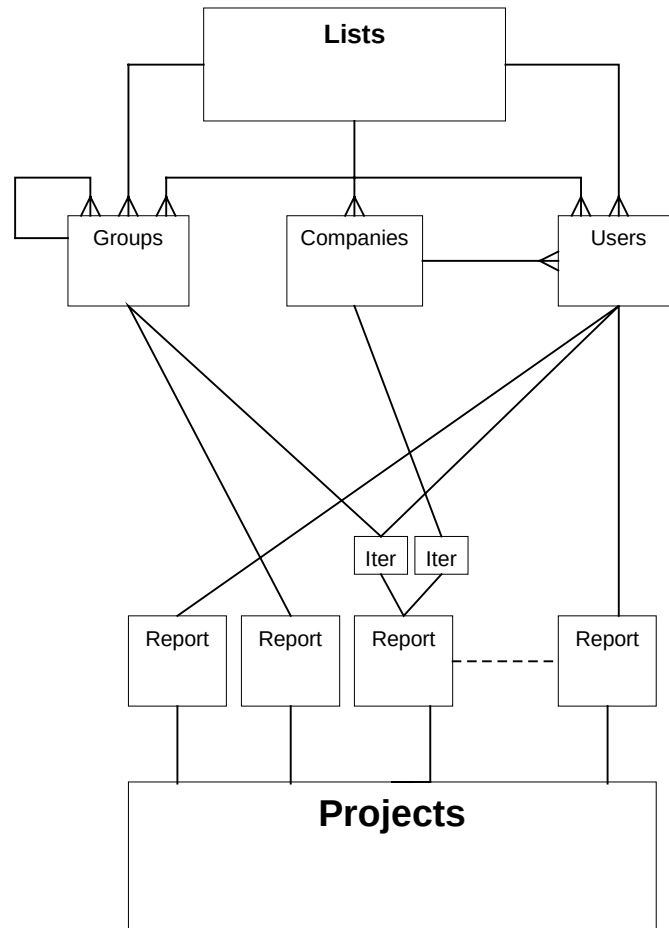
13.9 Making modifications to an individual report after it has been published

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.

14 Administration of End Users

This chapter will explain the *Endusers administration* interface. This administration includes the handling of *Lists* and *Projects*, and how *Users*, *Groups*, *Reports* and *Companies* are connected to them. The *Endusers* can then access the reports they have been given access to here, by entering the link to the *Endusers login page*.

The following figure visualizes the Endusers administration interface:



There are two “top” levels – *Lists* and *Projects*.

Lists:

- *List:*
 - Connect one or more groups, companies and users to a list.
- *Group:*
 - A group can consist of one or more users and one or more groups (**Note:** groups can be members of other groups).
 - Groups can be given access to iterations.
- *Companies:*
 - Companies can consist of one or more users.
- *Users:*
 - Users must belong to a company. A user can only belong to one company within a list.

- Users can be given access to iterations.

Projects:

- *Reports:*
 - Zero, one or many reports can belong to a project.
- *Iterations:*
 - A report can consist of iterations.

14.1 Menu

In the “Project” menu under “Endusers” you will find the following menu items:

- ***Users***
- ***Reports***
- ***Groups***
- ***Companies***
- ***Lists***

These items will be explained in the same order as above, after the features that are common for all these have been explained. However, you should be aware that the sequence for admitting might be different. For example, you will need a list before you can create or add the other elements, and a company needs to be created before you can enter any users.

You can add users, groups and companies to a list, and give permission to one or more reports from one or more projects. Elements can be changed, added and deleted when needed.

Example:

- Let us say you had three different reports in a project for a company and wanted the different endusers to have access to different reports. You could then add a company to the list, and create the users attached to this company. After that, you could add three different groups and attach e.g. five users to each group. Then the reports would be added and the different groups connected to the different reports. Maybe one of the groups should have access to all three reports, and the other groups only to one report each.

14.2 Endusers administration – graphic interface

The graphic interface, and buttons are the same for the menu items *Users*, *Reports*, *Groups* and *Companies*. Clicking the buttons will however give you different results, depending on the different interfaces: *Users*, *Reports*, *Groups* and *Companies*. The buttons will be inactive (grey) when the view you are in excludes any use of them. You will also get different search criteria when the *Filter* checkbox is checked, depending on the active menu item above. These differences will be dealt with in the following subchapters for the different menu items listed above.

The upper half frame of the window will be referred to as *Master frame*, and the bottom half as *Detail frame*. The content of these views will vary depending on the chosen menu item.

Users

Active list: UserManualList

Confirmit

Delete

New

☐	User no	User id	Name	Email	Company

Search

Details

Reports

Groups

Details

User no

User id

Password

Email

Last name

First name

Company

Language

Comment

Last logged on

Date created

English

Save

Figure 324: Endusers administration – graphic interface

14.2.1 Master frame – Buttons and checkboxes (in general)

The *Master frame* has the following buttons and checkboxes:

Option	Description
Search (button)	Activates a search based on the entered search criteria.
New (button)	Adds a new instance depending on the chosen menu item under the Endusers menu.
Save (button)	Saves the last changes.
Delete (button)	Deletes the active table row(s).

Table 93: Master Frame Properties

14.2.2 Detail frame – Buttons (in general)

The *Detail frame* has the following buttons:

Option	Description
New	Initiates a new user, group or company depending on which tab is selected in the <i>Detail</i> frame.
Save	Saves the last changes, or the last added instance.
Delete	Deletes the marked element(s), group(s) report(s) or company(s) related to the active instance being viewed.
Iterations/link	Gives an overview of the iterations that can be added to the user, group or company.

Table 94: Detail Frame Properties:

14.3 Users

14.3.1 Master frame – content

User no	User id	Name	Email	Company
3	User2	Test User	user2@company.com	Company1
2	User1	User Test	user1@company.com	Company1

Figure 325: Users – Master frame

The *Master frame* (upper half of the window) consists of the following:

- **Filter** related options:

Name	Type	Description
Filter	Checkbox	When checked, reveals the items below in this list.
UserId	Textbox	Contains search criterion.
FirstName	Textbox	Contains search criterion.
LastName	Textbox	Contains search criterion.
Company	Textbox	Contains search criterion.
Search	Button	Initiates the current search.

Table 95: Filter Related Options

Note: If you enter e.g. the letter “a” in the *FirstName* field, you will get all first names starting with this letter. The search fields are not case sensitive.

- A **Table of users** that consists of the following fields:

Field	Description
UserNo	A unique user number (chosen by Confirmit).
UserId	A unique user ID within the company that the user is connected to.
Name	Full name of the user
E-mail	User’s email address
Company	The Company that the user is attached to.

Table 96: Table of Users Fields

- **Buttons** (that are active for *Master frame*):

Option	Description
Search	Activates a search based on the entered search criteria.
New	Creates a new instance of <i>Users</i> .
Delete	Deletes the highlighted rows of users.

Table 97: Master Frame Buttons

14.3.2 Detail frame – content

The *Detail frame* under *Users* is divided into three different tabs: *Details*, *Reports*, and *Groups*. The next subchapters will go through each of these tabs.

14.3.2.1 Users - Details tab

The screenshot shows a web application interface for managing users. At the top, there's a header bar with 'User2' on the left and three tabs: 'Details', 'Reports', and 'Groups'. The 'Details' tab is currently selected. Below the tabs is a form titled 'Details' with various input fields. The fields are: 'User no' (value: 3), 'User id' (text input: User2), 'Password' (text input: User2), 'Email' (text input: user2@company.com), 'Last name' (text input: User), 'First name' (text input: Test), 'Company' (dropdown menu: Company1), 'Language' (dropdown menu: English), 'Comment' (text input), 'Last logged on' (text input), and 'Date created' (value: 2002-06-01 18:43:27). At the bottom of the form is a 'Save' button.

Figure 326: User – Details tab

When clicking one of the *New* buttons, a *Details* frame will then appear in the bottom half of the window (see figure 326 above). This is where you register the details for a new user.

Note: *Detail frame* and *Details* is not the same thing. *Details* is a part of the *Detail frame* in the *Users* interface.

- **Details** tab fields:

Fields	Description
UserNo	A unique user number (chosen by Confirmit).
UserId	A unique user ID within the company that the user is connected to.
Password	The user's password.

e-mail	The user's e-mail address.
Last name	User's last name.
First name	User's first name.
Company	The Company that the user will be attached to.
Language	The default language for the user.
Comment	Used for comments if needed.
LastLoggedOn	Indicates the last time the user was logged on to the end user interface.
DateCreated	Indicates the date the user was created.

Table 98: DetailsTab Fields

- **Buttons** (that are active for *Details* tab):

Option	Description
New	Creates a new instance of <i>Users</i> .
Save	Saves the new user or the changes made on existing user.

Table 99: Details Tab Buttons

14.3.2.2 Users - Reports tab

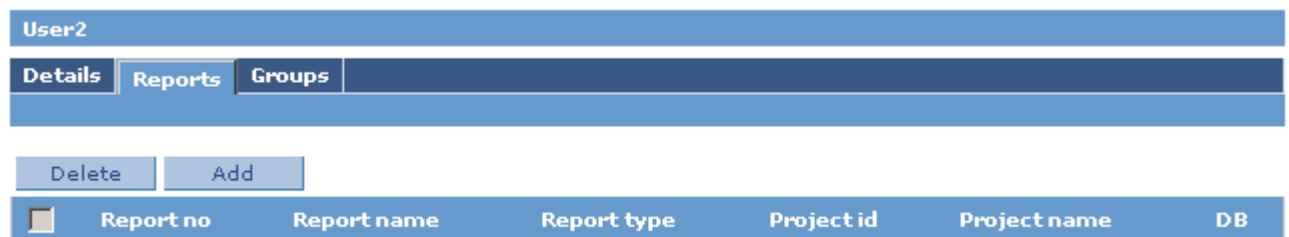


Figure 327: User – Reports tab

This tab shows the reports that the user has access to. Connect as many reports from as many projects as needed.

- **Reports** tab fields:

Field	Description
ReportNo	A unique report number (chosen by Confirmit).
ReportName	The name of the report.
ReportType	The different types are: Published report , Individual report and Pivot view .
ProjectId	The Id of the project that the report is connected to.
ProjectName	The name of the project the report is connected to
Test	Yes if the report is generated with the test database, <i>No</i> if the report is generated with the production database.

Table 100: Reports Tab Fields

- **Buttons** (that are active for *Reports* tab):

Option	Description
Add	Triggers a new window with a list of reports that can be added for the user
Delete	Deletes the highlighted report rows.
Iterations/link	Triggers a new window with a list of the iterations that belong to the report.

Table 101: Reports Tab Buttons

14.3.3 Adding new reports to the *Reports* table

When the Add button (in the detail frame) is clicked, a new window is triggered (see figure 328 below). Choose one or more reports to add to the user. The window will only show the reports that are currently unavailable to the user.

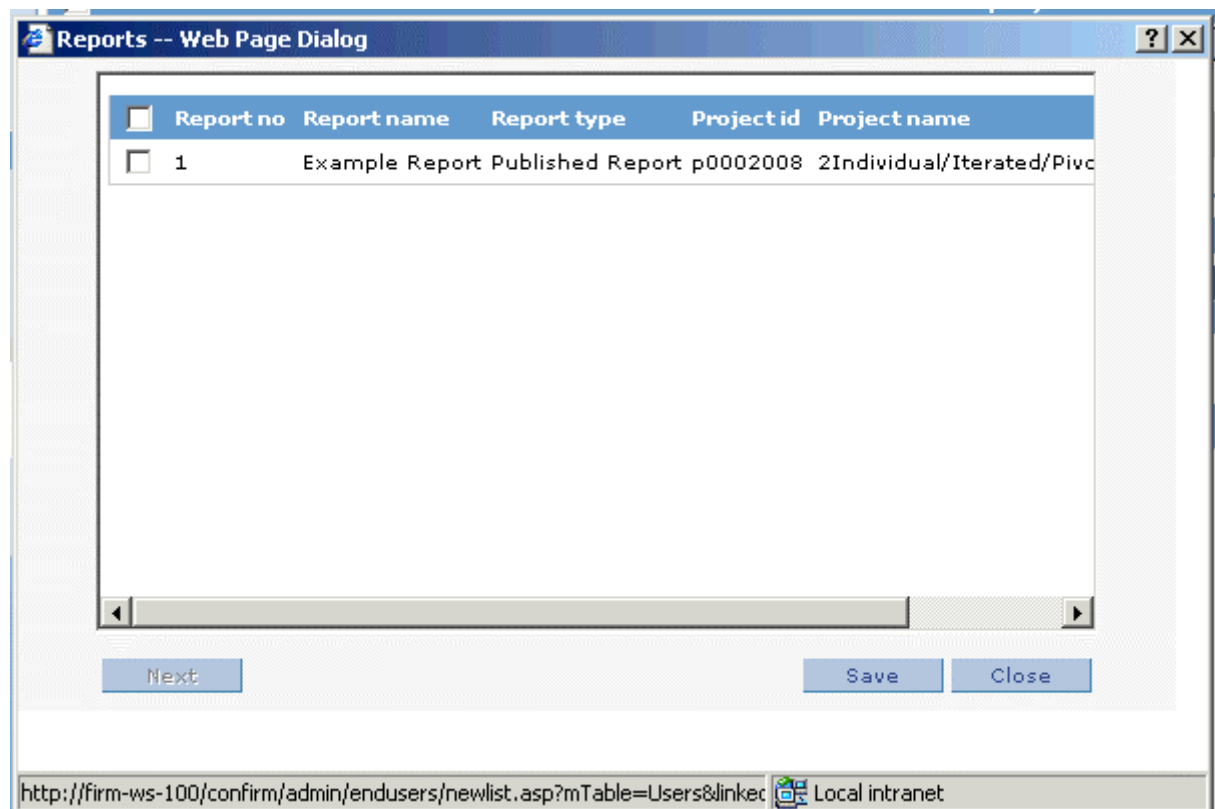


Figure 328: User – add reports

- Add *Reports* table fields:

Field	Description
ReportNo	A unique report number (chosen by Confirmit).
ReportName	The name of the report.
ReportType	The different types are: Published report , Individual report and Pivot view .
ProjectId	The Id of the project that the report is connected to.
ProjectName	The name of the project the report is connected to
Test	Yes if the report is generated with the test database, No if the report is generated with the production database.

Table 102: Add Reports Table Fields

- Add **Reports** buttons:

Option	Description
Next	Shows the next 50 table rows of reports.
Save	Saves the highlighted report rows into the <i>Reports</i> table in the <i>Detail frame</i> .
Close	Closes the window.

Table 103: Add Reports Buttons

14.3.4 Adding report iterations to the user

If a report consists of several iterations, you may add one or more of these to the user. The user will only be given access to the chosen iterations to that report. Read more about iterations in chapter 11.12.

The *Iterations* button triggers a new window with iterations connected to the highlighted report in the *reports* tab (see figure 329 below).

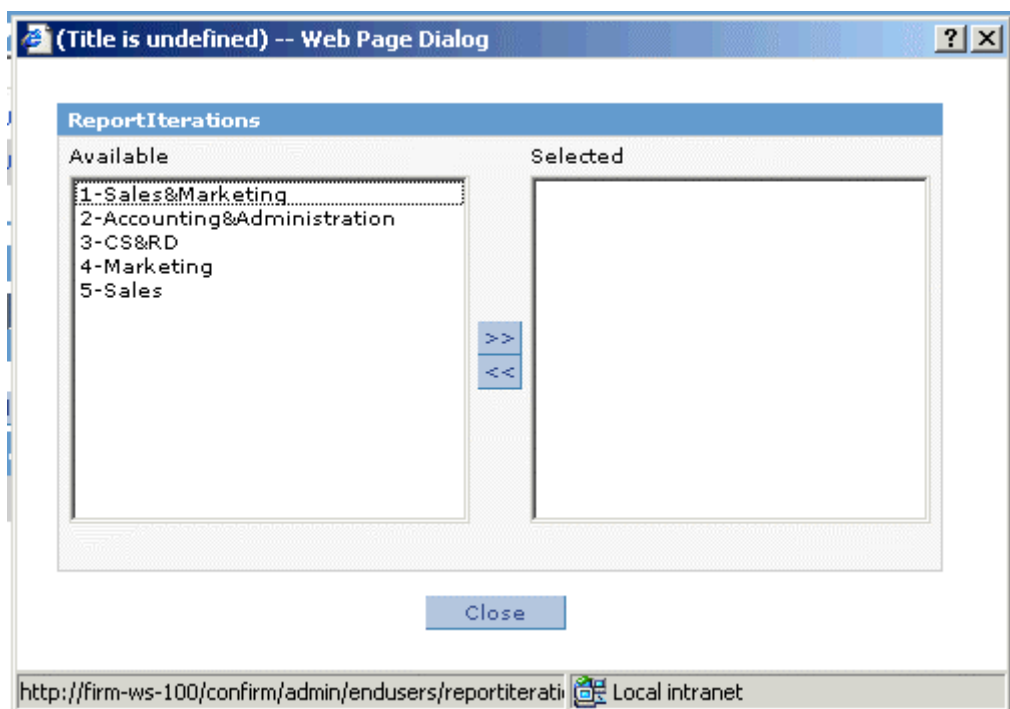


Figure 329: User – add iterations

14.3.4.1 Selecting and deselecting iterations

Select iterations: Click to highlight the wanted iterations in the *Available* frame, and then click the  button to transfer them to the *selected* frame.

Unselect iterations: Click to highlight the wanted iterations in the *Selected* frame, and then click the  button to transfer them back to the *Available* window.

Click the *Close* button to close the window.

14.3.4.2 Users - Groups tab



Figure 330: Users – Groups tab

This tab shows the groups that the user is a member of. A user may be connected to several groups.

- **Groups** tab fields

Field	Description
GroupNo	A unique group number (chosen by Confirmit).
GroupName	The name of the group.

Table 104: Groups Tab Fields

- **Buttons** (that are active for *Groups* tab):

Option	Description
Add	Triggers a new window with a list of groups that the user can be added to.
Delete	Deletes the highlighted group rows.

Table 105: Groups Tab Buttons

14.3.5 Adding new groups to the *Groups* table

When the Add button (in the detail frame) is clicked, a new window is triggered (see figure 331 below). Choose one or more groups to add to the user. The window will only show the groups that the user is currently not a member of.

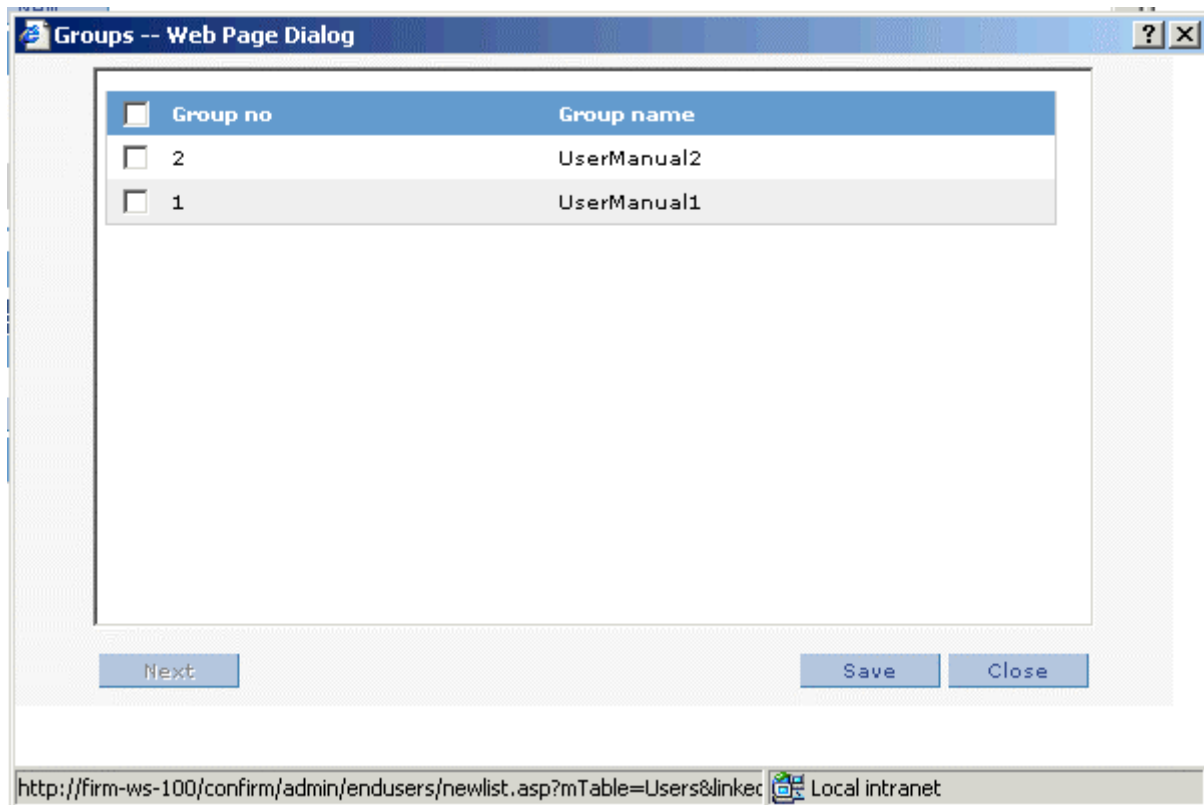


Figure 331: Users – add groups

- Add **Groups** table fields:

Field	Description
GroupNo	A unique group number (chosen by Confirmit).
GroupName	The name of the group.

Table 106: Add Groups Table Fields

- Add **Groups** buttons:

Option	Description
Next	Shows the next 50 table rows of groups.
Save	Saves the highlighted group rows into the <i>Groups</i> table in the <i>Groups</i> tab.
Close	Closes the window.

Table 107: Add Groups Buttons

14.4 Reports

14.4.1 Master frame – content

Report no	Report name	Report type	Project id	Project name	DB	Active
1	Example Report	Published Report	p0002008	2Individual/Iterated/Pivot Reporting prod	prod	☒

Figure 332: Reports – Master frame

The *Master frame* (upper half of the window) consists of the following:

- **Filter** related options:

Name	Type	Description
Search	Button	Performs a search according to entered Search criteria.
ReportName	Textbox	Contains search criterion.
ReportType	Textbox	Contains search criterion.

Table 108: Filter Related Options

Note: If you enter e.g. the letter “a” in the *ReportName* field, you will get all report names starting with this letter. The search fields are not case sensitive.

- A **Table of reports** that consists of the following fields:

Field	Description
ReportNo	A unique report number (chosen by Confirmit).
ReportName	The name of the report.
ReportType	The different types are: Published report , Individual report and Pivot view .
ProjectId	The Id of the project that the report is connected to.
ProjectName	The name of the project the report is connected to.
Test	Yes if the report is generated with the test database, No if the report is generated with the production database.
Active	If checked, the report is available for the endusers. If unchecked, the report is unavailable for the endusers. The report will not be deleted, only unavailable.

Table 109: Table of Reports Fields

This table shows all the

- **Buttons** (that are active for *Master frame*):

Option	Description
Search	Activates a search based on the entered search criteria.
Delete	Deletes the highlighted rows of reports.

Table 110: Master Frame Buttons

14.4.2 Detail frame – content

The *Detail frame* under *Reports* is divided into three different tabs: *Details*, *Users*, *Groups* and *Companies*. The next subchapters will go through each of these tabs.

14.4.2.1 Reports - Details tab for Published/ Iterated reports

The details for Published/ Iterated reports are slightly different from the Pivot view type reports. This subchapter will describe the options for Published/ Iterated reports and the next subchapter will describe the Pivot view report options.

Example Report (1)

Details | Users | Groups | Companies

Details

Report no: 1

Default language: English

Template: confirmit default

Protected: ☒

Active: ☒

Test database: ☐

Created by: user

Link: http://localhost/customer/publisher/r.asp?instance=1&lang=&iteration=

Scheduling: [Change](#)

Published Report: [View](#)

Run now: ☐

One page: ☐

Send email: Do not send

Email:

Status: Not run

Last run:

[Save](#)

Figure 333: Reports – Details tab

Double clicking a report row in the *Master frame* will activate a *Details* frame in the bottom half of the window (see figure 333 above). This is where you edit the details of a report.

Note: *Detail frame* and *Details* is not the same thing. *Details* is a part of the *Detail frame* in the *Reports* interface.

- **Details** tab fields:

Fields	Type	Description
ReportNo	Label	A unique report number (chosen by Confirmit).

Default Language	Dropdown	The default language for the report.
Template	Dropdown	The name of the template used for the report.
Protected	Checkbox	If checked, the report can only be accessed with username and password. If unchecked, the report is also accessible through the default link.
Active	Checkbox	If checked, the report is available for the endusers. If unchecked, the report is unavailable for the endusers. The report will not be deleted, only unavailable.
Test database	Checkbox	Checked if the report is generated with the test database. Not checked if the report is generated with the production database.
CreatedBy	Label	The Confirmit username of the user who created the report.
Link	Label	Link to the report. Only accessible if <i>protected</i> is unchecked.
Scheduling	Link	Brings you to scheduling interface.
Published Report	Link	Clicking the link will bring you to the <i>Preview</i> area, where you can preview the report. You will get one link per iteration. See chapter 11.12 for details.
Run now	Checkbox	Check this box and click <i>save</i> to republish the report.
One page	Checkbox	Indicates whether the report should be viewed on one page.
Send email	Drop down	Chose whether to send an email with the report in HTML format or not. <i>Send email</i> sends an email in addition to republishing the report. <i>Only send email</i> will not republish the report.
Email	Text box	The email address for the receiver of the report.
Status	Label	Indicates whether the report is <i>not run</i> , <i>failed</i> or <i>successfully</i> run.
Last run	Label	Indicates the last time the report was published.

Table 111: Details Tab Fields

- **Buttons** (that are active for *Details* tab):

Option	Description
Save	Saves the changes made on the report.

Table 112: Details Tab Buttons

14.4.2.2 Reports - Details tab for Pivot view reports

The details for Pivot view are slightly different than for the other report types, this subchapter will describe the Pivot view report options.

Pivot View 1 (3)

Details

Users

Groups

Companies

Details

Report no

3

Default language

English

Template

confirmit default (blue)

Protected

☒

Active

☒

Test database

☒

Created by

user

Published view

[Update](#)

Pivot View

[View](#)

Save

Figure 334: Reports – Details tab

Double clicking a report row in the *Master frame* will activate a *Details* frame in the bottom half of the window (see figure 334 above). This is where you edit the details of a report.

Note: *Detail frame* and *Details* is not the same thing. *Details* is a part of the *Detail frame* in the *Reports* interface.

- **Details** tab fields:

Fields	Type	Description
ReportNo	Label	A unique report number (chosen by Confirmit).
Default Language	Dropdown	The default language for the report.
Template	Dropdown	The name of the template used for the report.
Protected	Checkbox	By default checked,- the report can only be accessed with username, and password.
Active	Checkbox	If checked, the report is available for the endusers. If unchecked, the report is unavailable for the endusers. The report will not be deleted, only unavailable.
Test database	Checkbox	Checked if the report is generated with the test database. Not checked if the report is generated with the production database.
Created by	Label	The Confirmit username of the user who created the report.
Published view	Link	Updates the Published view according to the last changes.
Pivot view	Link	This link will send you to the Preview area for the Pivot view.

Table 113: Details Tab Fields

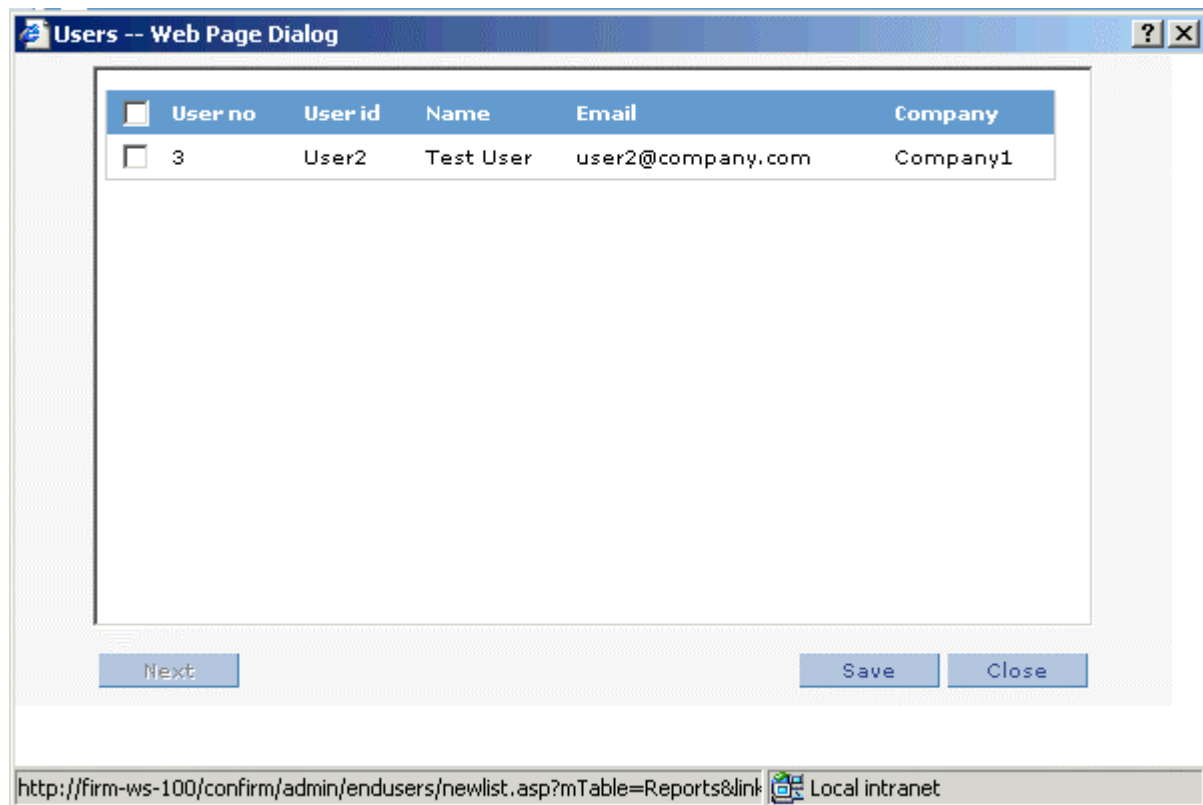


Figure 336: Reports – add Users

- Add *Users* table fields:

Fields	Description
User no	A unique user number (chosen by Confrimit).
User id	A unique user ID within the company that the user is connected to.
Name	The user's full name.
Email	The user's e-mail address.
Company	The Company that the user will be attached to.

Table 117: Add Users Table Fields

- Add *Users* buttons:

Option	Description
Next	Shows the next 50 table rows of users.
Save	Saves the highlighted user rows into the <i>Users</i> table in the <i>Users</i> tab.
Close	Closes the window.

Table 118: Add Users Buttons

14.4.4 Adding report iterations to the user

If a report consists of several iterations, you may add one or more of these to users. The users will only be given access to the selected iterations for that report. Read more about iterations in chapter 11.12.

The *Iterations* button triggers a new window with iterations connected to the highlighted report in the *reports* tab (see figure 337 below).

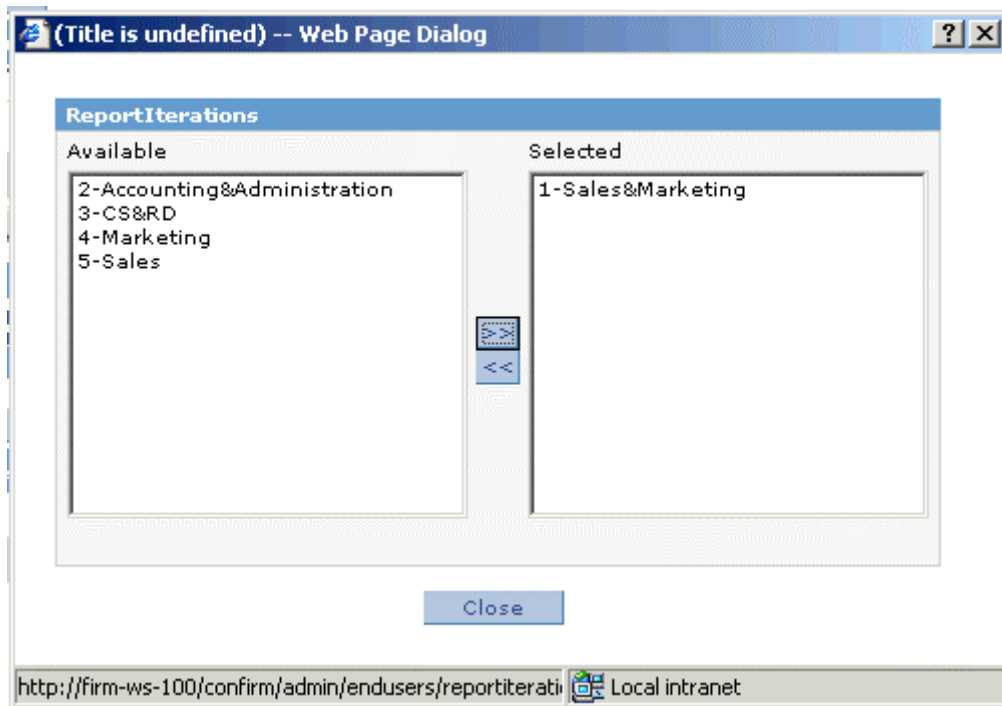


Figure 337: Reports – add iterations to users

14.4.4.1 Selecting and deselecting iterations

Select iterations: Click to highlight the wanted iterations in the *Available* frame, and then click the  button to transfer them to the *selected* frame.

Unselect iterations: Click to highlight the wanted iterations in the *Selected* frame, and then click the  button to transfer them back to the *Available* window.

Click the *Close* button to close the window.

14.4.4.2 Reports - Groups tab



Figure 338: Reports – Groups tab

This tab shows the groups that have access to this report.

- **Groups** tab fields

Field	Description
GroupNo	A unique group number (chosen by Confirmit).
GroupName	The name of the group.

Table 119: Groups Tab fields

- **Buttons** (that are active for *Groups* tab):

Option	Description
Add	Triggers a new window with a list of groups that can be added to the report.
Delete	Deletes the highlighted group rows.
Iterations/link	Triggers a new window with a list of the iterations that the group may be given access to.

Table 120: Groups Tab Buttons

14.4.5 Adding new groups to the *Groups* table

When the *Add* button (in the detail frame) is clicked, a new window is triggered (see figure 339 below). Choose one or more groups to add to the report. The window will only show the groups that have not been given access to the report.

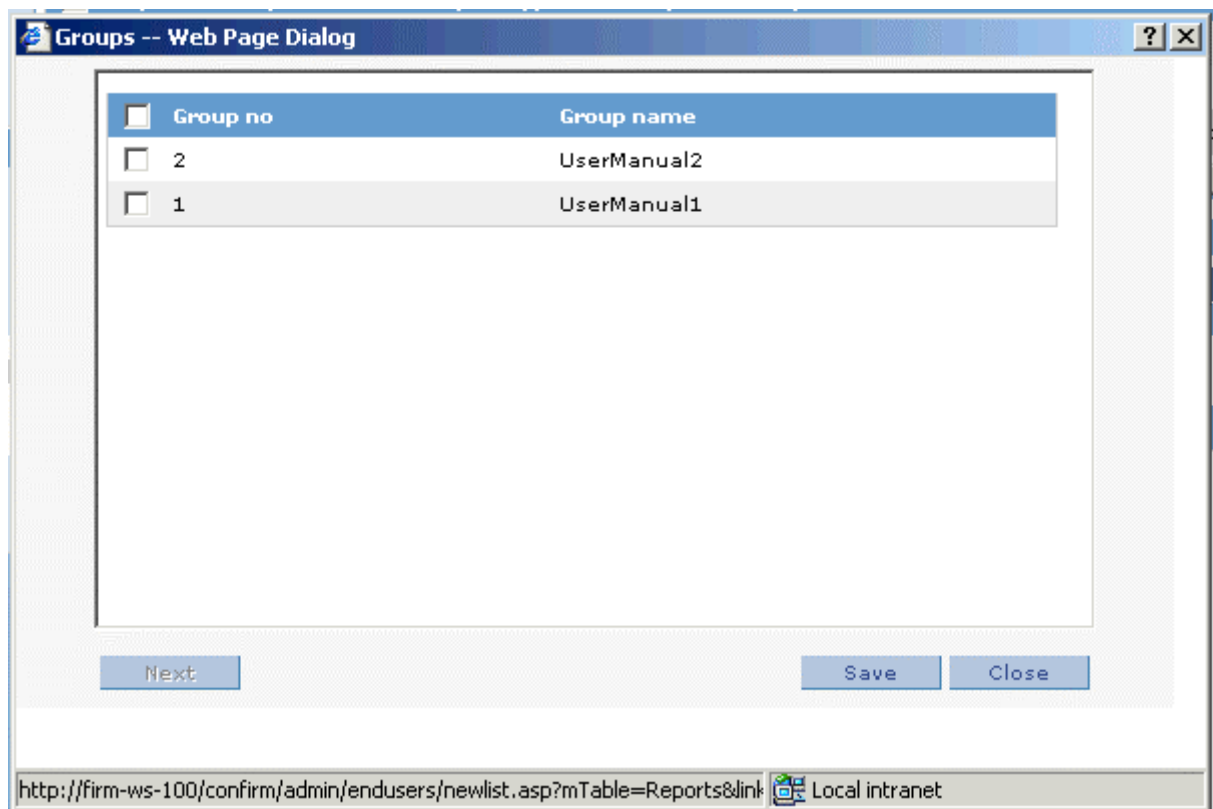


Figure 339: Reports – add groups

- Add **Groups** table fields:

Field	Description
GroupNo	A unique group number (chosen by Confirmit).
GroupName	The name of the group.

Table 121: Add Groups Table Fields

- Add **Groups** buttons:

Option	Description
Next	Shows the next 50 table rows of groups.
Save	Saves the highlighted group rows into the <i>Groups</i> table in the <i>Groups</i> tab.
Close	Closes the window.

Table 122: Add Reports Buttons

14.4.6 Adding report iterations to groups

If a report consists of several iterations, you may add one or more of these to groups. The groups will only be given access to the selected iterations for that report. Read more about iterations in chapter 11.12.

The *Iterations* button triggers a new window with iterations connected to the highlighted report in the *reports* tab (see figure 340 below).

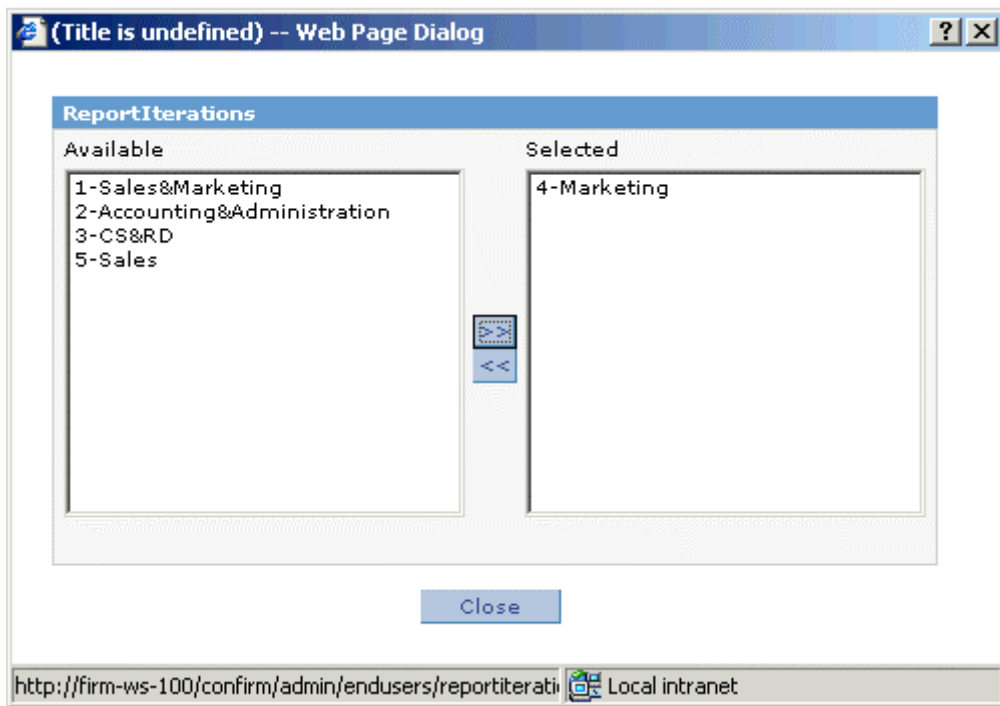


Figure 340: Reports – add iterations to groups

14.4.6.1 Selecting and deselecting iterations

Select iterations: Click to highlight the wanted iterations in the *Available* frame, and then click the  button to transfer them to the *selected* frame.

Unselect iterations: Click to highlight the wanted iterations in the *Selected* frame, and then click the  button to transfer them back to the *Available* window.

Click the *Close* button to close the window.

14.4.6.2 Reports - Companies tab

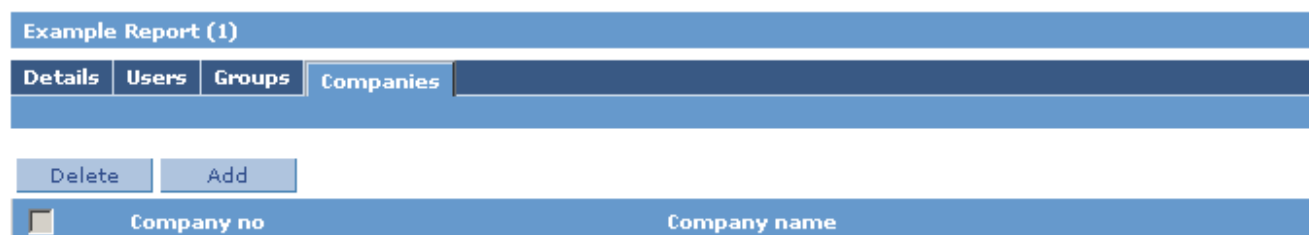


Figure 341: Reports – Companies tab

This tab shows the companies that have access to this report.

- **Companies tab** fields

Field	Description
Company no	A unique company number (chosen by Confirmit).
Company name	The name of the company.

Table 123: Companies Tab Fields

- **Buttons** (that are active for *Companies* tab):

Option	Description
Add	Triggers a new window with a list of companies that can be added to the report.
Delete	Deletes the highlighted companies rows.
Iterations/link	Triggers a new window with a list of the iterations that the company may be given access to.

Table 124: Companies Tab Buttons

14.4.7 Adding new companies to the *Companies* table

When the *Add* button (in the detail frame) is clicked, a new window is triggered (see figure 342 below). Choose one or more companies to add to the report. The window will only show the companies that have not been given access to the report.

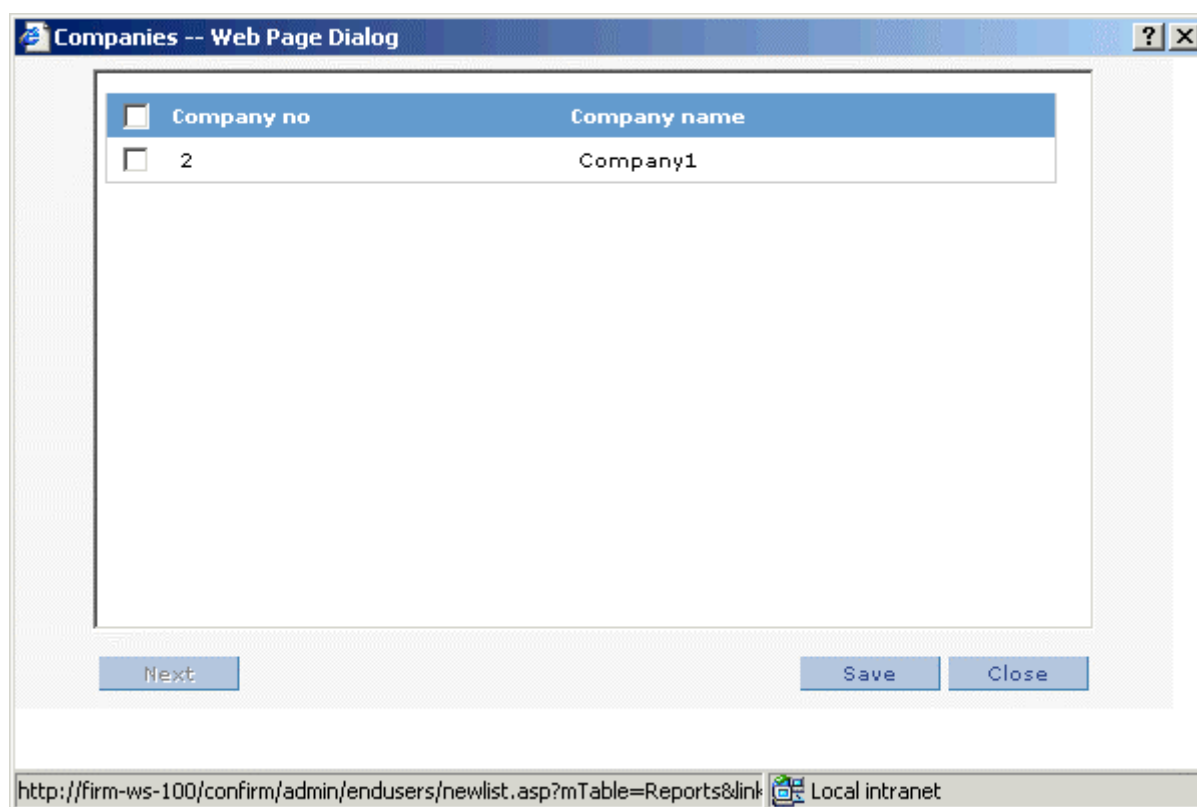


Figure 342: Reports – add companies

- Add *Companies* table fields:

Field	Description
Company no	A unique company number (chosen by Confirmit).
Company name	The name of the company.

Table 125: Add Companies Table Fields

- Add *Companies* buttons:

Option	Description
Next	Shows the next 50 table rows of companies.
Save	Saves the highlighted company rows into the <i>Companies</i> table in the <i>Companies</i> tab.
Close	Closes the window.

Table 126: Add Companies Buttons

14.4.8 Adding report iterations to companies

If a report consists of several iterations, you may add one or more of these to companies. The companies will only be given access to the selected iterations for that report. Read more about iterations in chapter 11.12.

The *Iterations* button triggers a new window with iterations connected to the highlighted report in the *reports* tab (see figure 343 below).

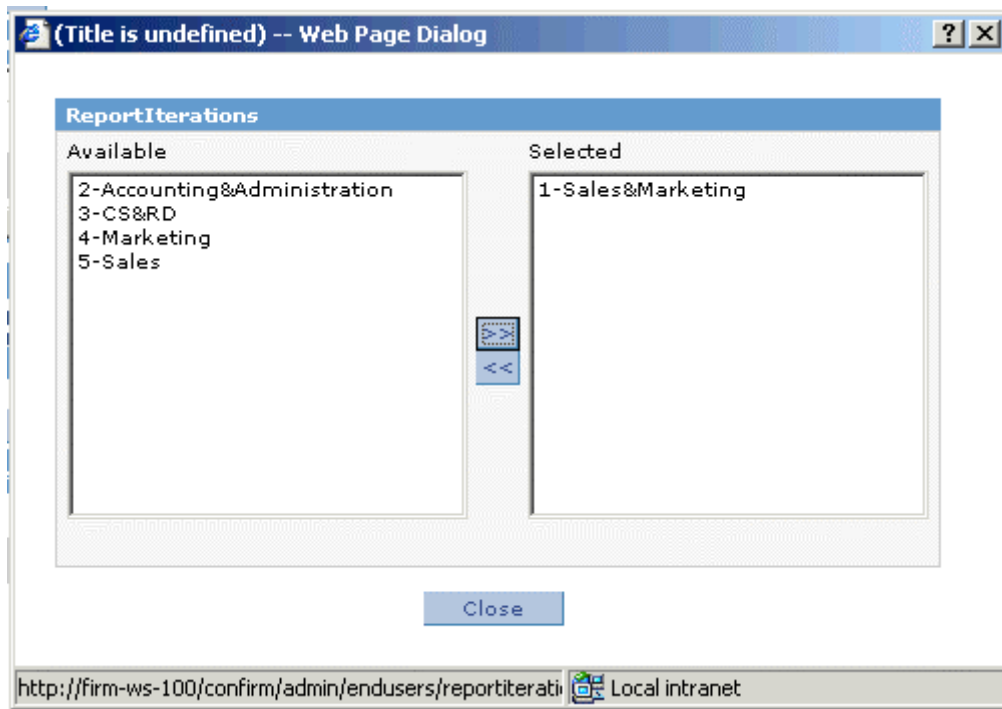


Figure 343: Reports – add iterations to companies

14.4.8.1 Selecting and deselecting iterations

Select iterations: Click to highlight the wanted iterations in the *Available* frame, and then click the  button to transfer them to the *selected* frame.

Unselect iterations: Click to highlight the wanted iterations in the *Selected* frame, and then click the  button to transfer them back to the *Available* window.

Click the *Close* button to close the window.

14.5 Groups

14.5.1 Master frame – content

Groups

Active list: UserManualList p0002008

Delete New

☐	Group no	Group name	
☐	2	UserManual2	
☐	1	UserManual1	

Search

Figure 344: Groups – Master frame

The *Master frame* (upper half of the window) consists of the following:

- **Filter** related options:

Name	Type	Description
Filter	Checkbox	When checked, reveals the items below in this list.
Group name	Textbox	Contains search criterion.

Table 127: Filter Related Options

Note: If you enter e.g. the letter “a” in the *Group name* field, you will get all group names starting with this letter. The search fields are not case sensitive.

- A **Table of Groups** that consists of the following fields:

Field	Description
Group no	A unique group number (chosen by Confrimit).
Group name	The name of the group.

Table 128: Table of Groups

This table shows all the

- **Buttons** (that are active for *Master frame*):

Option	Description
Search	Activates a search based on the entered search criterion.
Delete	Deletes the highlighted rows of groups.

Table 129: Master Frame Buttons

14.5.2 Detail frame – content

The *Detail frame* under *Groups* is divided into four different tabs: *Details*, *Reports*, *Users* and *Groups*. The next subchapters will go through each of these tabs.

14.5.2.1 Groups - Details tab

The screenshot shows a software interface for 'UserManual1'. At the top, there's a blue header bar with the text 'UserManual1'. Below it, there's a row of four tabs: 'Details', 'Reports', 'Users', and 'Groups'. The 'Details' tab is currently selected and highlighted. Below the tabs, there's a form area. Inside this area, there's a sub-header 'Details' in a blue box. Below this, there are two fields: 'Group no' with the value '1' and 'Group name' with the value 'UserManual1'. At the bottom of the form area, there's a blue button labeled 'Save'.

Figure 345: Groups – Details tab

Double clicking a group row in the *Master frame* will activate a *Details* frame in the bottom half of the window (see figure 345 above). This is where you edit the details of a group.

Note: *Detail frame* and *Details* is not the same thing. *Details* is a part of the *Detail frame* in the *Groups* interface.

- **Details** tab fields:

Fields	Type	Description
Group no	Label	A unique group number (chosen by Confirmit).
Group name	Text box	The name of the group.

Table 130: Details Tab Fields

- **Buttons** (that are active for *Details* tab):

Option	Description
New	Creates a new instance of <i>Groups</i> (You need to name it and save it to make it active).
Save	Saves the new group or the changes made to existing group.

Table 131: Details Tab Buttons

14.5.2.2 Groups - Reports tab



Figure 346: Groups – Reports tab

This tab shows the reports that the group has access to. Connect as many reports from as many projects as needed.

- **Reports** tab fields:

Field	Description
ReportNo	A unique report number (chosen by Conformat).
ReportName	The name of the report.
ReportType	The different types are: <i>Published report</i> , <i>Individual report</i> and <i>Pivot view</i> .
ProjectId	The Id of the project that the report is connected to.
ProjectName	The name of the project the report is connected to.
Test	Yes if the report is generated with the test database, No if the report is generated with the production database.

Table 132: Reports Tab Fields

- **Buttons** (that are active for *Reports* tab):

Option	Description
Add	Triggers a new window with a list of reports that can be added for the group.
Delete	Deletes the highlighted report rows.
Iterations/link	Triggers a new window with a list of the iterations that belong to the report.

Table 133: Reports Tab Buttons

14.5.3 Adding new reports to the *Reports* table

When the *Add* button (in the detail frame) is clicked, a new window is triggered (see figure 347 below). Choose one or more reports to add to the group. The window will only show the reports that are currently unavailable to the group.

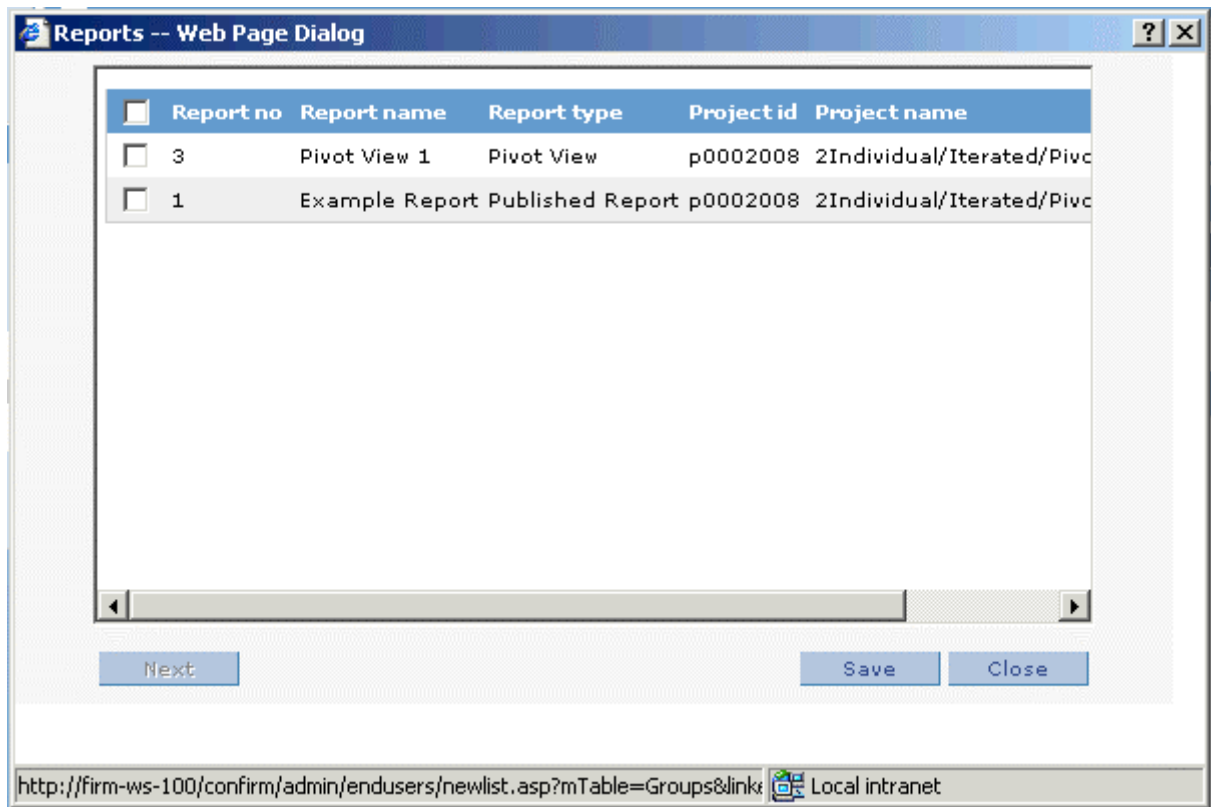


Figure 347: Groups – add reports

- Add **Reports** table fields:

Field	Description
ReportNo	A unique report number (chosen by Confirmit).
ReportName	The name of the report.
ReportType	The different types are: <i>Published report</i> , <i>Individual report</i> and <i>Pivot view</i> .
ProjectId	The Id of the project that the report is connected to.
ProjectName	The name of the project the report is connected to
Test	Yes if the report is generated with the test database, <i>No</i> if the report is generated with the production database.

Table 134: Add Reports Table Fields

- Add **Reports** buttons:

Option	Description
Next	Shows the next 50 table rows of reports.
Save	Saves the highlighted report rows into the <i>Reports</i> table in the <i>Detail frame</i> .
Close	Closes the window.

Table 135: Add Reports Buttons

14.5.4 Adding report iterations to a group

If a report consists of several iterations, you may add one or more of these to the group. The group will only be given access to the chosen iterations of that report. Read more about iterations in chapter 11.12.

The *Iterations* button triggers a new window with iterations connected to the highlighted report in the *reports* tab (see figure 348 below).

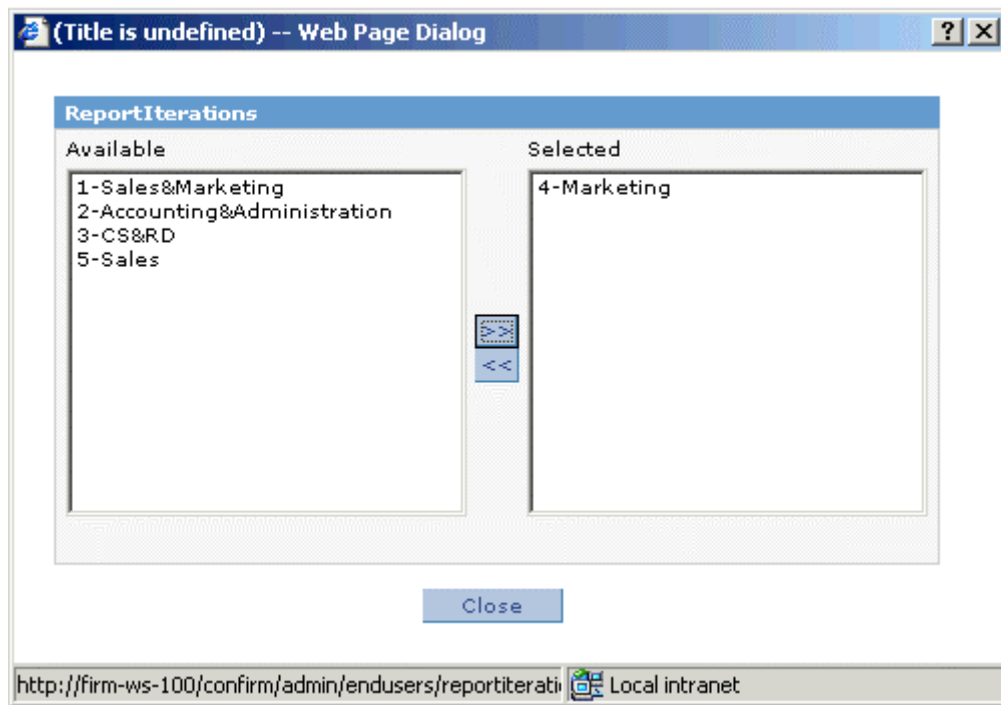


Figure 348: Groups – add iterations

14.5.4.1 Selecting and deselecting iterations

Select iterations: Click to highlight the wanted iterations in the *Available* frame, and then click the  button to transfer them to the *selected* frame.

Unselect iterations: Click to highlight the wanted iterations in the *Selected* frame, and then click the  button to transfer them back to the *Available* frame.

Click the *Close* button to close the window.

14.5.4.2 Groups - Users tab

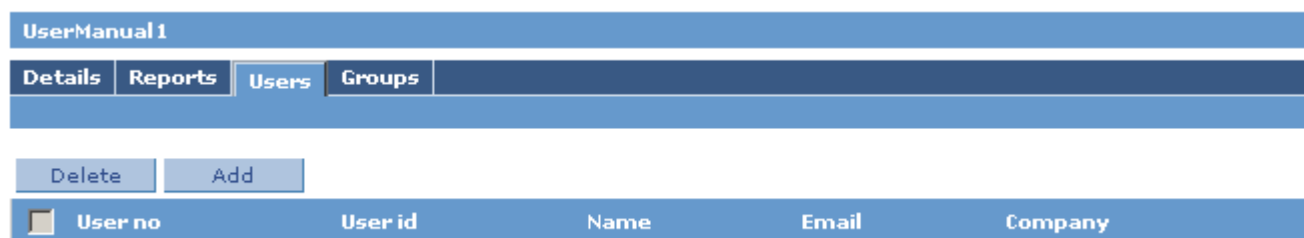


Figure 349: Groups – Users tab

This tab shows which users are connected to the group. New users can be added to the group by clicking the *New* button.

- **Users** tab fields

Fields	Description
UserNo	A unique user number (chosen by Conformat).
UserId	A unique user ID within the company that the user is connected to.
Name	The users full name.
e-mail	The users e-mail address.
Company	The Company that the user will be attached to.

Table 136: Users Tab Fields

- **Buttons** (that are active for *Users* tab):

Option	Description
Add	Triggers a new window with a list of users that can be added to the group.
Delete	Deletes the highlighted user rows.

Table 137: Users Tab Buttons

14.5.5 Adding new users to the *Users* table

When the *Add* button (in the detail frame) is clicked, a new window is triggered (see figure 350 below). Choose one or more users to add to the group. The window will only show the users that are not members of this group.

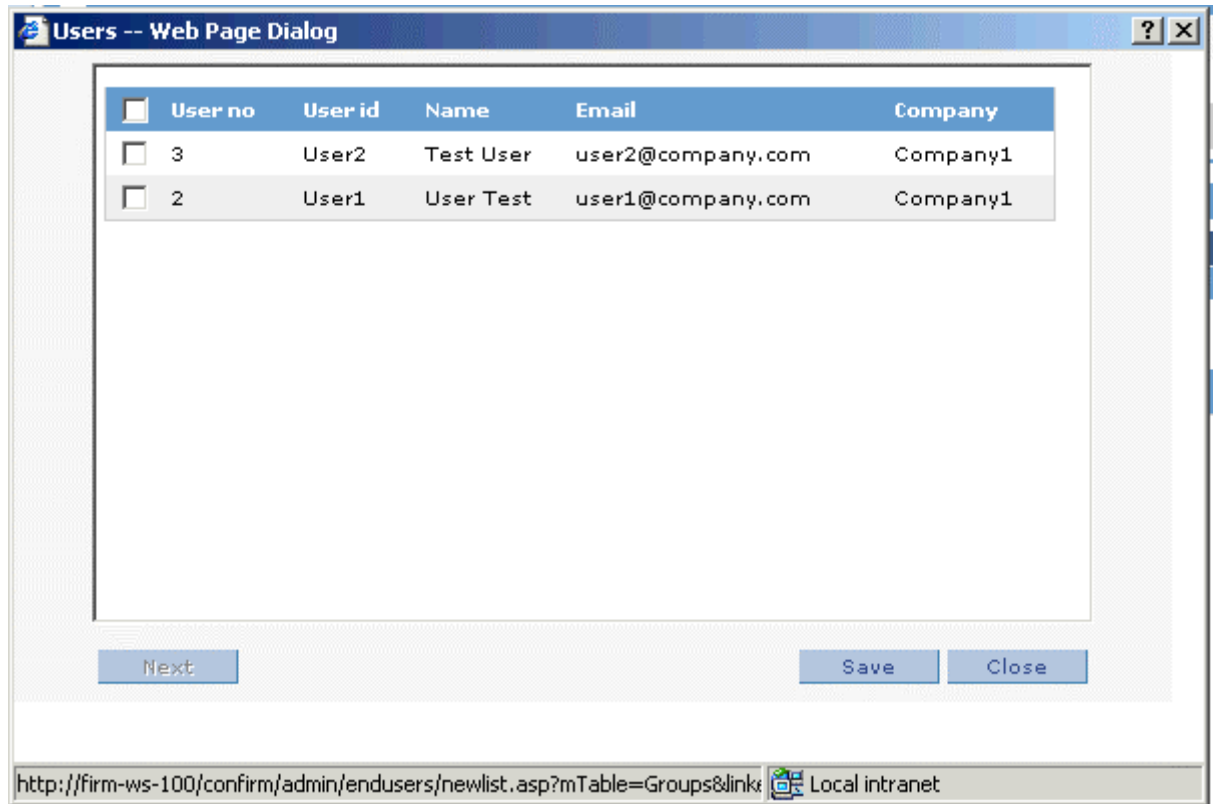


Figure 350: Groups – add Users

- Add *Users* table fields:

Fields	Description
User no	A unique user number (chosen by Confirmit).
User id	A unique user ID within the company that the user is connected to.
Name	The user's full name.
Email	The user's e-mail address.
Company	The Company that the user will be attached to.

Table 138: Add Users Table Fields

- Add *Users* buttons:

Option	Description
Next	Shows the next 50 table rows of users.
Save	Saves the highlighted user rows into the <i>Users</i> table in the <i>Users</i> tab.
Close	Closes the window.

Table 139: Add Users Buttons

14.5.5.1 Groups - Groups tab



Figure 351: Groups – Groups tab

A group can have other groups as members, as well as users and companies.

- **Groups** tab fields

Field	Description
GroupNo	A unique group number (chosen by Conformat).
GroupName	The name of the group.

Table 140: Groups Tab Fields

- **Buttons** (that are active for *Groups* tab):

Option	Description
Add	Triggers a new window with a list of groups that can be added to the group.
Delete	Deletes the highlighted group rows.

Table 141: Groups Tab Buttons

14.5.6 Adding new groups to the *Groups* table

When the *Add* button (in the detail frame) is clicked, a new window is triggered (see figure 352 below). Choose one or more groups to add to the group. The window will only show the groups that are not members of this group.

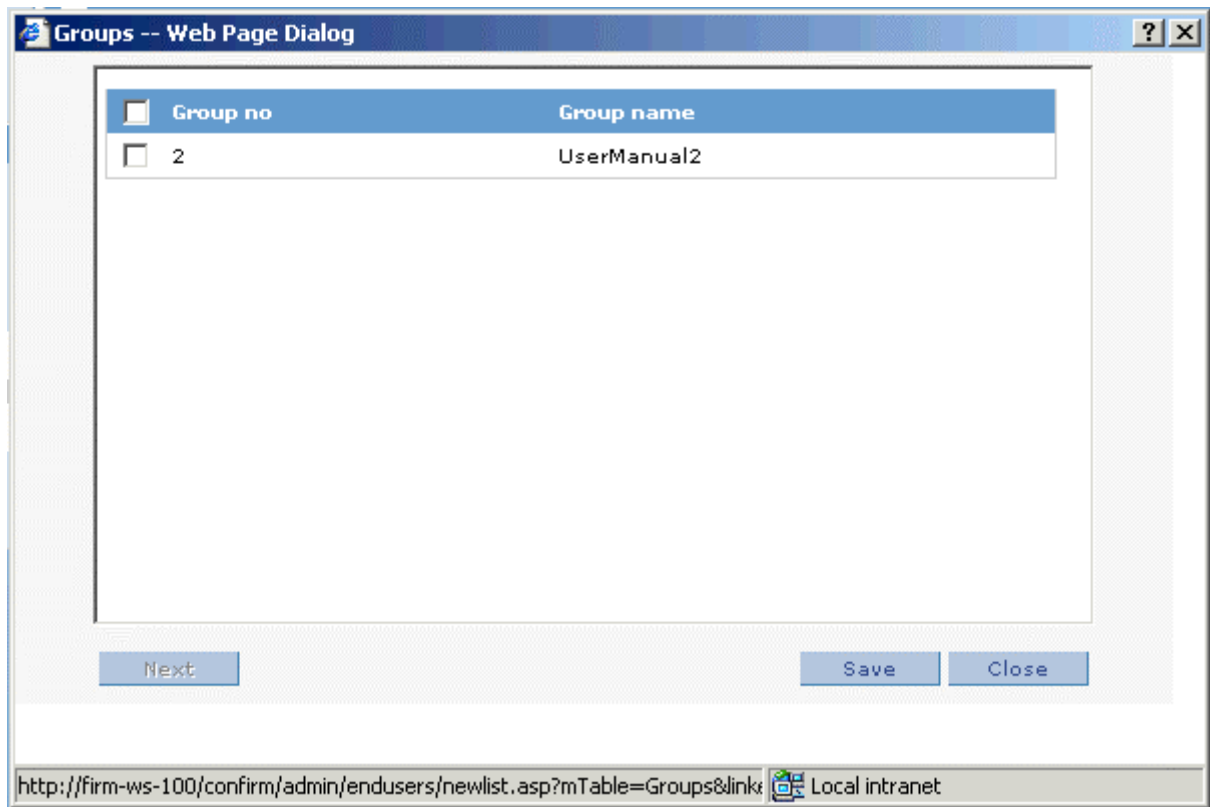


Figure 352: Groups – add groups

- Add **Groups** table fields:

Field	Description
GroupNo	A unique group number (chosen by Confirmit).
GroupName	The name of the group.

Table 142: Add Groups Table Fields

- Add **Groups** buttons:

Option	Description
Next	Shows the next 50 table rows of groups.
Save	Saves the highlighted group rows into the <i>Groups</i> table in the <i>Groups</i> tab.
Close	Closes the window.

Table 143: Add Groups Button

14.6 Companies

14.6.1 Master frame – content

Companies

Active list: UserManualList p0002008

Delete New

☐	Company no	Company name
☐	2	Company1

Search

Figure 353: Companies – Master frame

The *Master frame* (upper half of the window) consists of the following:

- **Filter** related options:

Name	Type	Description
Search	Button	Activates a search based on the entered search criteria.
Company name	Text box	Contains search criterion.

Table 144: Filter Related Options

Note: If you enter e.g. the letter “a” in the *Group name* field, you will get all report names starting with this letter. The search fields are not case sensitive.

- A **Table of Companies** that consists of the following fields:

Field	Description
Company no	A unique company number (chosen by Conformat).
Company name	The name of the company.

Table 145: Table of Companies

This table shows all the

- **Buttons** (that are active for *Master frame*):

Option	Description
Search	Activates a search based on the entered search criterion.
Delete	Deletes the highlighted rows of companies.

Table 146: Master Frame Buttons

14.6.2 Detail frame – content

The *Detail frame* under *Companies* is divided into three different tabs: *Details*, *Users* and *Reports*. The next subchapters will go through each of these tabs.

14.6.2.1 Companies - Details tab

Figure 354: Companies – Details tab

Double clicking a company row in the *Master frame* will activate a *Details* frame in the bottom half of the window (see figure 354 above). This is where you edit the details of a company.

Note: *Detail frame* and *Details* is not the same thing. *Details* is a part of the *Detail frame* in the *Companies* interface.

- **Details** tab fields:

Fields	Type	Description
Company no	Label	A unique company number (chosen by Confirmit).
Company name	Text box	The name of the company.

Table 147: Details Tab Fields

- **Buttons** (that are active for *Details* tab):

Option	Description
New	Creates a new instance of <i>Companies</i> (You need to name it and save it to make it active).
Save	Saves the new company or the changes made to existing company.

Table 148: Details Tab Buttons

14.6.2.2 Companies - Users tab

Company 1

Details

Reports

Users

User no	User id	Name	Email	Company
3	User2	Test User	user2@company.com	Company1
2	User1	User Test	user1@company.com	Company1

Figure 355: Companies – Users tab

This tab shows which users are connected to the company. **Note:** You cannot add or delete users here. This must be done under the *Users* menu. The reason for this is the nature of the relationship between users and companies.

- ***Users*** tab fields

Fields	Description
User no	A unique user number (chosen by Conformat).
User id	A unique user ID within the company that the user is connected to.
Name	The user's full name.
Email	The user's e-mail address.
Company	The Company that the user will be attached to.

Table 149: Users Tab Fields

- **Buttons** (that are active for *Users* tab):

Option	Description
Prev	Shows the previous 50 table rows of users.
Next	Shows the next 50 table rows of users.

Table 150: Users Tab Buttons

14.6.2.3 Companies - Reports tab

Company 1

Details

Reports

Users

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 356: Companies – Reports tab

This tab shows the reports that the company has access to. Connect as many reports from as many projects as needed.

- **Reports** tab fields:

Field	Description
ReportNo	A unique report number (chosen by Confirmit).
ReportName	The name of the report.
ReportType	The different types are: <i>Published report</i> , <i>Individual report</i> and <i>Pivot view</i> .
ProjectId	The Id of the project that the report is connected to.
ProjectName	The name of the project the report is connected to
Test	Yes if the report is generated with the test database, <i>No</i> if the report is generated with the production database.

Table 151: Reports Tab Fields

- **Buttons** (that are active for *Reports* tab):

Option	Description
Add	Triggers a new window with a list of reports that can be added for the group.
Delete	Deletes the highlighted report rows.
Iterations/link	Triggers a new window with a list of the iterations that belong to the report.

Table 152: Reports Tab Buttons

14.6.3 Adding new reports to the *Reports* table

When the *Add* button (in the detail frame) is clicked, a new window is triggered (see figure 357 below). Choose one or more reports to add to the company. The window will only show the reports that are currently unavailable to the company.

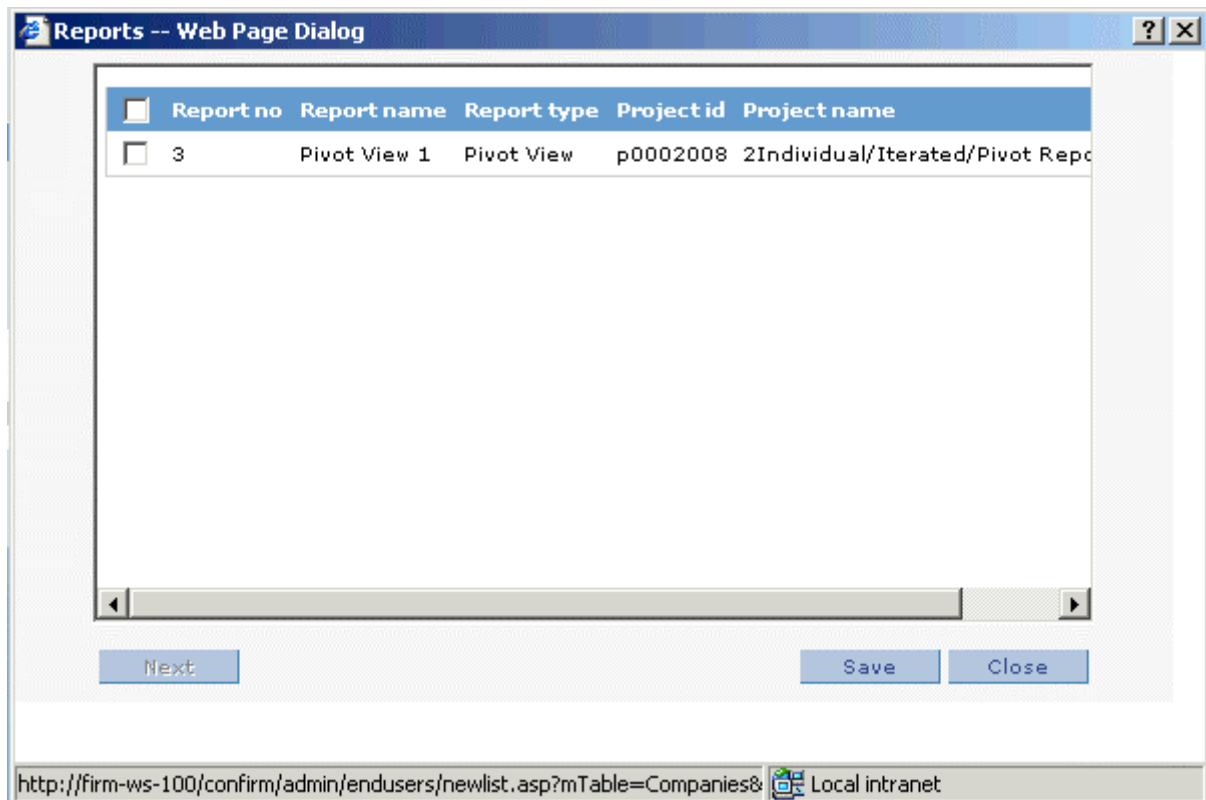


Figure 357: Companies – add reports

- Add **Reports** table fields:

Field	Description
ReportNo	A unique report number (chosen by Confirmit).
ReportName	The name of the report.
ReportType	The different types are: <i>Published report</i> , <i>Individual report</i> and <i>Pivot view</i> .
ProjectId	The Id of the project that the report is connected to.
ProjectName	The name of the project the report is connected to
Test	Yes if the report is generated with the test database, No if the report is generated with the production database.

Table 153: Add Reports Table Fields

- Add **Reports** buttons:

Option	Description
Next	Shows the next 50 table rows of reports.
Save	Saves the highlighted report rows into the <i>Reports</i> table in the <i>Detail frame</i> .
Close	Closes the window.

Table 154: Add Reports Buttons

14.6.4 Adding report iterations to a company

If a report consists of several iterations, you may add one or more of these to the company. The company will only be given access to the chosen iterations to that report. Read more about iterations in chapter 11.12.

The *Iterations* button triggers a new window with iterations connected to the highlighted report in the *reports* tab (see figure 358 below).

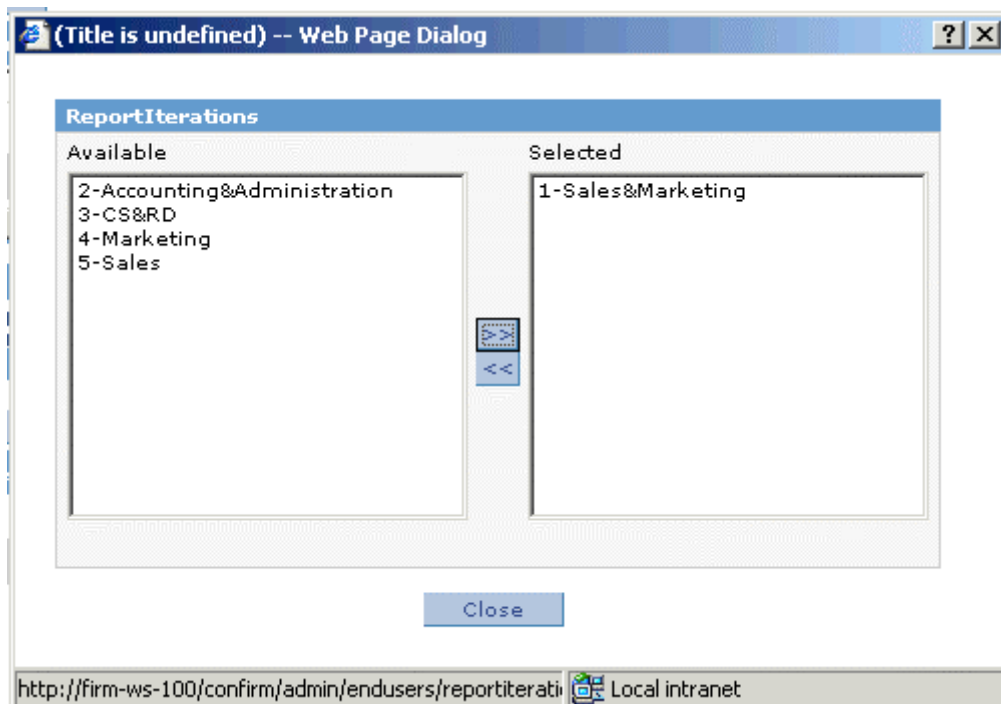


Figure 358: Companies – add iterations

14.6.4.1 Selecting and deselecting iterations

Select iterations: Click to highlight the wanted iterations in the *Available* frame, and then click the  button to transfer them to the *Selected* frame.

Unselect iterations: Click to highlight the wanted iterations in the *Selected* frame, and then click the  button to transfer them back to the *Available* window.

Close window: Click the *Close* button to close the window.

14.7 Enduser lists

Only a Confirmit administrator can create an enduser list. The administrator gives permissions to other users for access to the list. When you click the *Lists* menu item under the *Endusers* menu, you will be brought to the list overview:

Lists

Active list: UserManualList p0002008

[Delete](#) [New](#)

☐	Name	Template	Creator	Created	Active
☐	UserManualList	confirmit default (blue)	Manual, User	01.jun.02	Yes

[Search](#)

UserManualList

Details

Name UserManualList

Template confirmit default (blue)

Security [Security](#)

Login [Login](#)

URL http://localhost/customer/login/login.asp?listid=3684

Creator Manual, User

Created 01.jun.02

[Save](#) [Deactivate](#)

Figure 359: Lists – overview

14.7.1 List fields

Field	Type	Description
Name	Text box	The name of the list.
Template	Dropdown	The template for the login page.
URL	Link	The URL to the endusers login page.
Creator	Label	The creator of the list.
Created	Label	The date when the list was created
Set	Link	Activates the list item.
Delete	Link	Deletes the list.

Table 155: List Fields

14.7.2 Field details

Some of the fields in the table above need more detailed explanation:

- **Name:** Only a Confirmit administrator can change the name of a list.
- **Template:** The template chosen here will decide the layout on the enduser login page. The following fields in the WI template will affect the appearance:
 - *Report header:* Will be shown above the *Login* box.
 - *Report footer:* Will be shown below the *Login* box.
 - *Report dark color:* Decides the dark color of the *Login* box. This is the color of the upper field in the *Login* box.
 - *Report light color:* Decides the light color of the *Login* box. This is the color of the lower field in the *Login* box.
 - *Body attributes:* The body attributes will apply to this page as for any other HTML page.
- **URL:** This is the URL that will be sent to the endusers. The default language for this page is English, but can be changed by adding the following text to the URL:

&l=<langId>

The **<langId>** should be replaced by the language Id that you want to set for this page, e.g. for Norwegian, the link would be:

http://...../customer/login/login.asp?listid=46318&l=20

- **Set:** When clicked, it will highlight the list row. This means that it will be chosen as the list you want to work with. A list has to be chosen to get access to the menu items: *Users*, *groups* and *companies* under the *Endusers* menu.

Delete: When clicked, you will get the following warning window:

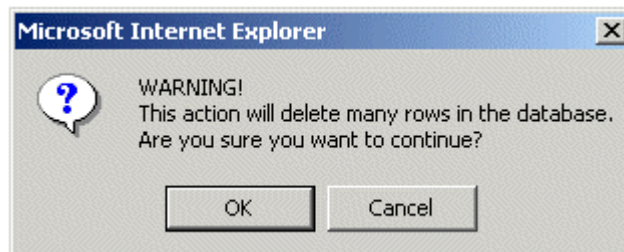


Figure 360: Warning in Endusers Administration Window

If you choose to continue, you will delete the list with all connected companies, groups, users and their connections to reports and iterations. You will not delete any reports.

15 Login Interface for End Users

End user is a new concept within Conformat. It is functionality that makes it possible for a user without user access to Conformat, 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 Conformat apart from viewing reports, matrix-views or individual-reports. The end user has to provide user-id and password when logging on to this page. This data will be validated against information lying 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.

15.1 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

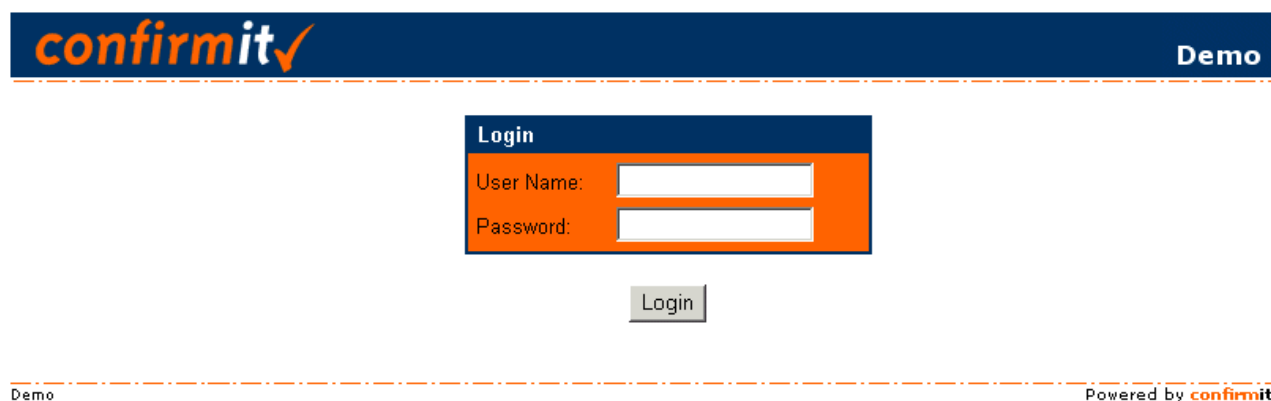


Figure 361: Login Page

- The Login fields

Field	Description
User Name	Enter the user name
Password	Enter the password

Table 156: 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. See picture below.

Report Overview

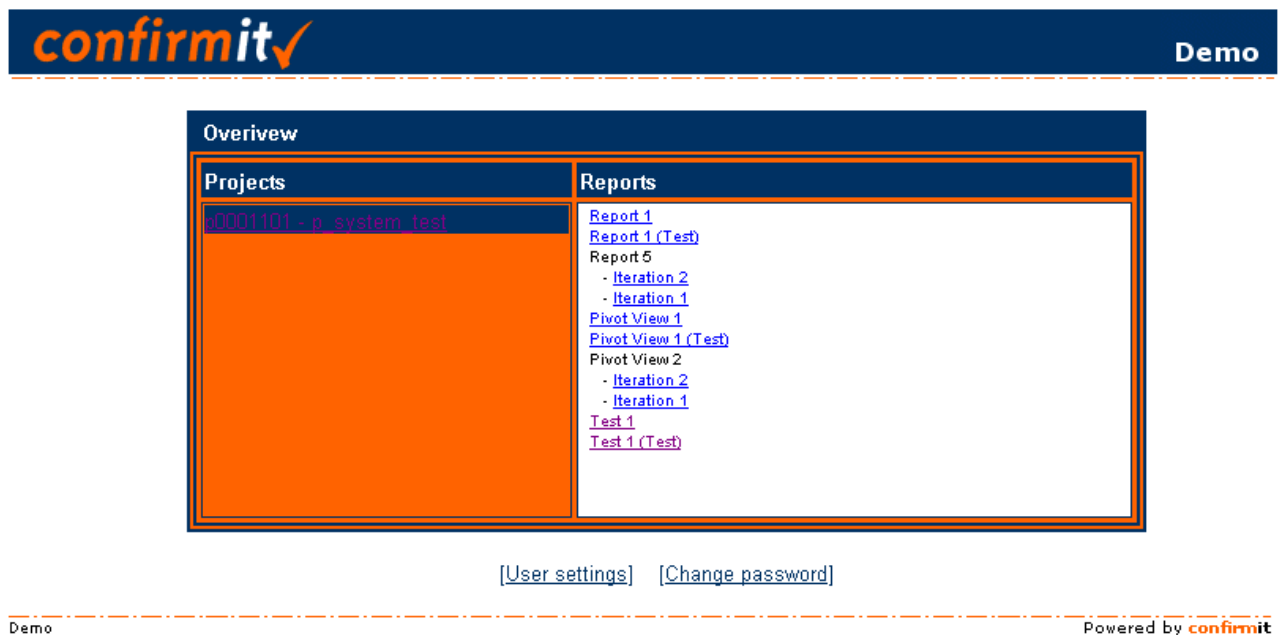


Figure 362: Report Overview

- 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 157: 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 158: Links in the Overview Window

To view a report the user simply has to click on the desired report link. The report is opened in a new window.

15.2 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

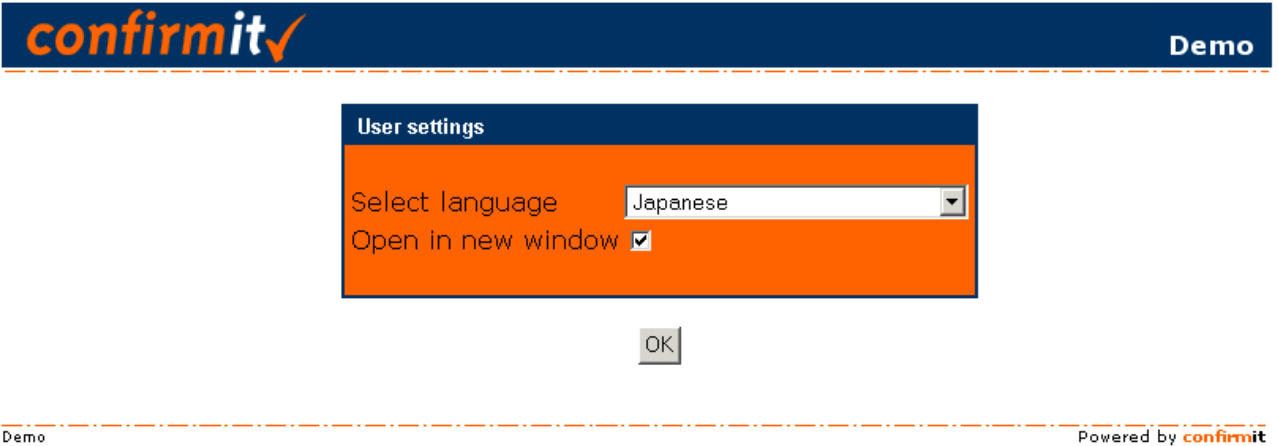


Figure 363: User Settings

- Fields in User settings window

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 159: 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

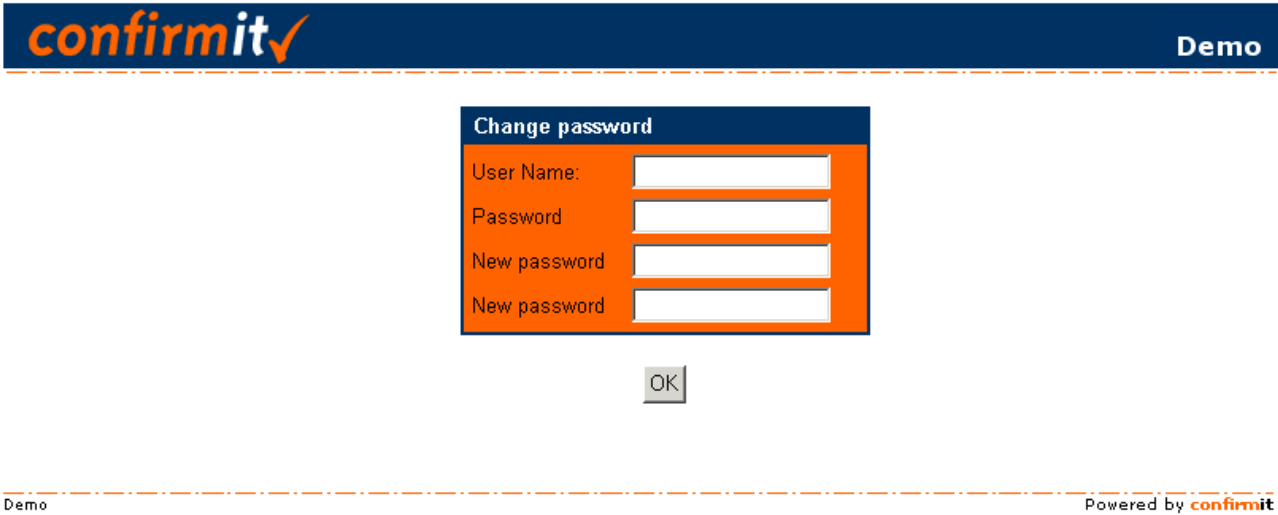


Figure 364: Change Password

- Fields in the Change password window

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 160: Fields in the Change Password Window

The new password has to be written twice. The “OK” button leads the user back to the “Report Overview” window.

16 Data Transfer

Response data (the answers to the questions in the surveys) can be exported from and imported to Confirmit projects. It is possible to export response data to SPSS, MS Excel and ASCII files. Data can be imported from ASCII tab-delimited files.

The files will use the labels that are used in the database, based on the question IDs.

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 161: Labels

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.

16.1 Template Editor

You may build templates to choose a subset of data fields for your exports and imports. Instead of choosing all variables when preparing an export or import, you may choose one of these templates to get the subset you want.

The template editor allows you to specify templates both for the production and the test database. 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. So before editing templates you have to select which database you want to use and then click "Show".

Field chooser template editor

Database templates. p0002008

Template list

Database Production

Show

(New template)

Edit

Copy

New

Delete

Template details

Template name

(New template)

Verbatim key field

(default: respid)

Std fields

responseid

respid

status

interview_start

interview_end

>

>>

User defined fields

name

department

use_1

use_2

use_3

level_1

level_2

level_3

>

>>

<

<<

Recoded fields

>

>>

Export/import fields

^

v

Save

Figure 365: 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.
Verbatim key field	Open Text questions that have no field width specified (see 5.2.1.5) 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 has to be done for the Open Text questions (see 5.2.1.5 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 (e.g. a member id) this may be set in the "Verbatim key field".
Std fields	These are standard system-generated fields. responseid Respondent identification assigned when the respondent starts answering the survey.

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	respid Respondent identification assigned when the respondent is added to the respondent list. status 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. interview_start The time when the respondent entered the questionnaire. If the respondent is allowed to re-enter the questionnaire, it will be the last time the respondent entered the questionnaire. interview_end The time when the respondent finished the questionnaire, either from a STOP node or by reaching the end of the questionnaire.
User defined fields	All the variables from the questionnaire, including hidden questions, but excluding recoded variables.
Recoded fields	All recoded variables from the questionnaire (see Chapter 12)
Export fields	These are the fields that will be included in the exports done with this template.

Table 162: 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.

16.2 Exports

The first step is to choose the export type.

Figure 366: 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.

	for your project.
MS Word Export	Export the questionnaire (question texts and answer lists) to MS Word®.

Table 163: Export Mechanisms

16.2.1 Data Export

Data Export

Export survey production data to ASCII or MS Excel format. p0002008

Export properties

Project ID	p0002008
Export format	Excel file
Export template	All fields
Data export	Complete responses
Partial exports	☐
Language	English
Character Encoding	ANSI
Recipient email	usermanual@firmglobal.com
Comment	
Start time	ASAP

OK

Figure 367: Data export

16.2.1.1 Export format

Export Format	Description
Excel file	MS Excel® file in the Office version specified in User Settings (see 0). 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.
Delimited text file, comma separated, quoted	Comma (,) separated ASCII text file. All answers will be inside quotes ("").. The variable names will be in the first row.
Delimited text file, tab separated, not quoted	Tab separated ASCII text file. No quotes ("").. The variable names will be in the first row.
Fixed-width text file	Fixed-width ASCII text file. Will give an export file of single, multi and grid questions. If Open Text questions have field width specified (see 5.2.1.5), 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 16.2.1.4). 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 e.g. a precode 1 with a field width of 3 will be reported as "001".
Excel definition file for fixed-width text file	Will generate a MS Excel® file with a description of the exported fixed-width text file. (The information provided may be useful for other exports as well.) Form ID The Question (form) ID Var ID The variable name. Form ID and Var ID will be equal for Single an Open Text questions, but will differ for Grids and Multi questions. See the beginning of this chapter for an explanation of the variable names of multis and grids. Start Col The start position of this variable in the export file, counting characters from left to right. End Col The end position of this variable in the export file, counting characters from left to right. Punch Will list the possible punches (precodes) for these answers corresponding to the texts in the Answer Text field. Question Text The text of the question. Answer Text The text of the answer. (Corresponding to Punch). Data Type Question type (or system generated type).

	Level ID Loop level. Gives the id of the loop this question is inside.
SPSS	Export a fixed width file and a SPSS definition file.
Open-end questions	Open-end questions are all open questions (Open Text questions, Other, specify from answer lists or Multi questions with Open Text property selected) that do not have a field width specified (see 5.2.1.5). 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 16.1). For open-ended questions inside loops, the loop id(s) will be included as well.

Table 164: Export formats

16.2.1.2 Export template

Choose between "all fields" or a user-defined template for a subset of the fields. (See 16.1 Template Editor.)

16.2.1.3 Data Export

Choose if you want your export to include all responses, or just the ones with status "complete" (default).

16.2.1.4 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.

Data Export

Export survey production data to ASCII or MS Excel format. p0002008

Export properties

Project ID	p0002008
Export format	Fixed-width text file
Export template	All fields
Data export	Complete responses
Open ends	Truncate to 32 char
Partial exports	Ignore Truncate to 8 char Truncate to 16 char Truncate to 32 char Truncate to 64 char Truncate to 128 char Truncate to 255 char
Language	
Character Encoding	ANSI
Recipient email	usermanual@firmglobal.com
Comment	
Start time	ASAP

OK

Figure 368: Truncating Open Ends

16.2.1.5 Partial exports

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. Partial 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".

Data Export

Export survey production data to ASCII or MS Excel format.
p0002008

Export properties

Project ID
p0002008

Export format
Excel file

Export template
All fields

Data export
All responses

Partial exports
☒

Start date

Day

Month

Year

End date

Day

Month

Year
1997
1998
1999
2000
2001
2002
2003

Language
English

Character Encoding
ANSI

Recipient email
usermanual@firmnglobal.com

Comment

Start time
ASAP

OK

Figure 369: Partial export

16.2.1.5.1 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 respid remains unique, so it will be easy to find duplicates in exports done at different dates.

16.2.1.6 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).

16.2.1.7 Character encoding

To support export of open text answers in surveys using Unicode (e.g. Chinese) it is possible to choose the Character Encoding of the Export files. You can choose between ANSI (default) and Unicode character encoding.

16.2.1.8 Recipient email

The export file is sent to this mail address.

16.2.1.9 Comment

Use this field to specify details about your export to make it easier identifying the task in task management.

16.2.1.10 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.

16.3 SPSS Export

Choose SPSS from the Data Export menu to order the SPSS export.

The screenshot shows the 'Data Export' dialog box. At the top, it says 'Export survey production data to ASCII or MS Excel format.' with a project ID 'p0002008'. Below this is the 'Export properties' section. It contains the following fields:

- Project ID:** p0002008
- Export format:** SPSS (selected in a dropdown menu)
- Export template:** All fields (selected in a dropdown menu)
- Data export:** Complete responses (selected in a dropdown menu)
- Open ends:** Ignore (selected in a dropdown menu)
- Partial exports:** ☐
- Language:** English (selected in a dropdown menu)
- Character Encoding:** ANSI (selected in a dropdown menu)
- Recipient email:** usermanual@firmglobal.com
- Comment:** (empty text field)
- Start time:** ASAP (selected in a dropdown menu)

At the bottom of the dialog is an 'OK' button.

Figure 370: SPSS Export

The SPSS export will come as a fixed-width ASCII file and a SPSS syntax file (with extension .sps), not 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 run the script either by

choosing Run -> All or by selecting all syntax and press the  button. (see Figure 371: Run SPSS script).

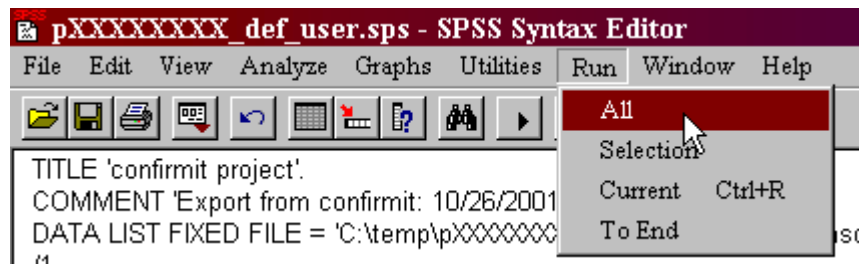


Figure 371: Run SPSS script

16.3.1.1 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 (e.g. q1). For multi and grid questions the variable names will be in the form question id + underscore + precode (e.g. 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.

16.3.1.2 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.

16.3.1.3 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.

16.3.1.4 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.

16.3.1.5 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 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.

16.3.1.6 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).

16.4 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.

Data Export

Export survey production data to ASCII or MS Excel format. p0001001

Export properties

Project ID	p0001001
Export format	Excel file
Export template	All fields
Data export	Complete responses
Loops	Separate files
Partial exports	☐

Figure 372: Export options for loops

16.4.1 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.

16.4.2 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.

In the Data Export window you may select "Single file" in the "Loops" drop down box to perform a single file export.

The screenshot shows a 'Data Export' window with a title bar. Below the title bar, it says 'Export survey production data to ASCII or MS Excel format.' and 'p0001001'. The main section is titled 'Export properties' and contains several fields:

- Project ID:** p0001001
- Export format:** Excel file (dropdown)
- Export template:** All fields (dropdown)
- Data export:** Complete responses (dropdown)
- Loops:** Single file (dropdown, highlighted)
- Partial exports:** ☐
- Language:** English (dropdown)
- Character Encoding:** ANSI (dropdown)
- Recipient email:** usermanual@firmglobal.com
- Comment:** (empty text box)
- Start time:** ASAP (dropdown)

At the bottom center, there is an 'OK' button.

Figure 373: Ordering 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.

DATA EXPORT

Export survey production data to ASCII or MS Excel format.

The screenshot shows a 'DATA EXPORT' window with a title bar and a subtitle 'Export survey production data to ASCII or MS Excel format.' The main window has a light blue background and contains several fields and buttons. A 'Microsoft Internet Explorer' dialog box is overlaid on top of the main window, displaying a warning message about file size.

Export properties

- Project ID: p0026587
- Export format: Excel file
- Export template: Data_fields

Microsoft Internet Explorer

The ordered Excel export will generate a file with a size of 4300.6 KB.
A separate-file export will generate smaller files.
Do you want to continue with the export?

OK Cancel

Character encoding UTF-8

- Recipient email: [text box]
- Comment: [text box]
- Start time: ASAP

OK

Figure 374: 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 easily be changed by a system administrator.

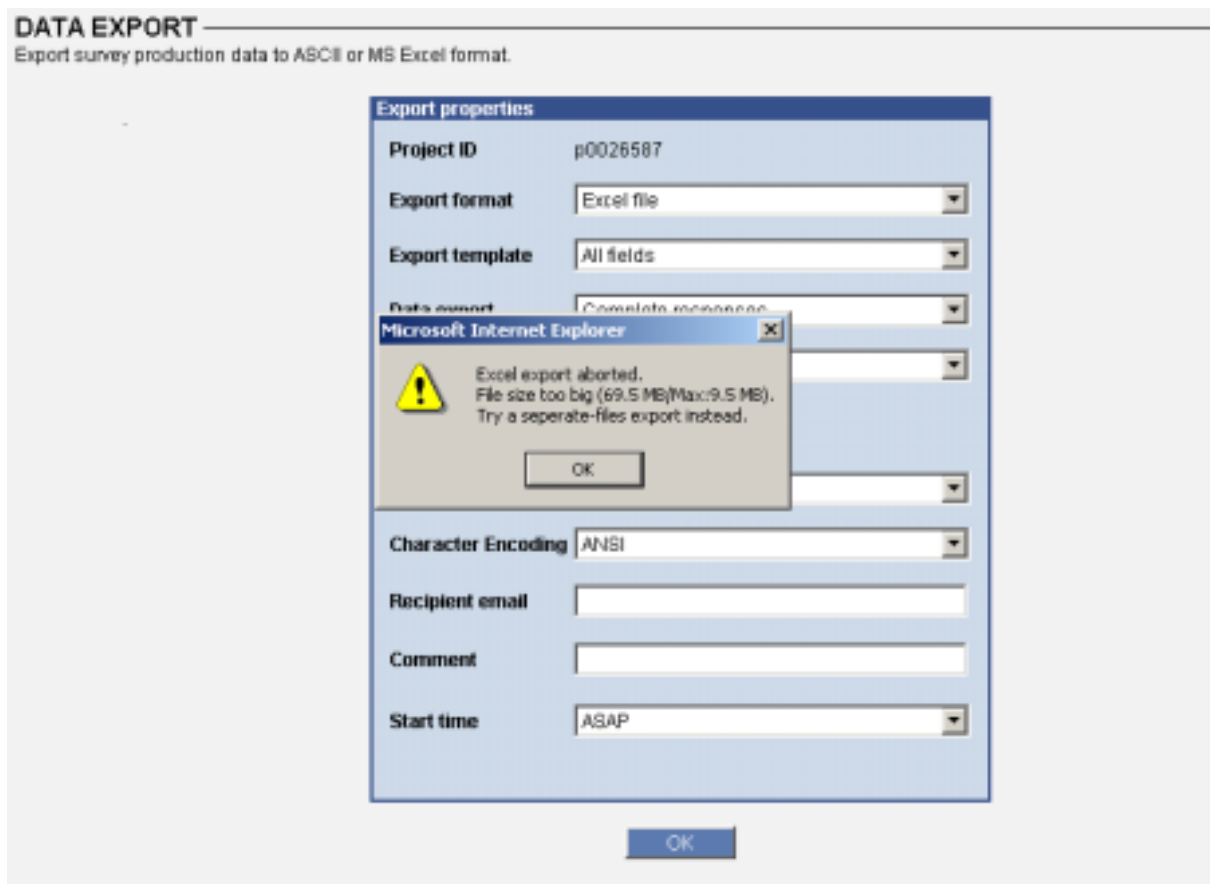


Figure 375: Aborted Single File Export

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.

16.4.2.1 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 – e.g. 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.

16.5 Report Export

For a description see Chapter 11.

16.6 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.

The Word Export mechanism has problems with very large projects, especially when they include very long answer lists. If this causes the word export task to abort, a workaround can be to duplicate the project and remove the long answer list or split the project in two just for the word export.

MS Word Export

Export questionnaire to MS Word format (last compiled version). p0001001

Export properties

Project ID p0001001

Database Test

Language English

Recipient email usermanual@firmglobal.com

Comment

Start time ASAP

OK

Figure 376: MS Word Export

Word Export property	Description
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"

Table 165: SPSS Export properties

16.7 Imports

Response data from other systems or from other Confirmit projects can be imported into a Confirmit survey. This makes it possible to compare data and to do all reporting in Confirmit.

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 has to 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.

NB! It is not recommended to import data into live surveys, or to a survey that will be re-opened.

In case you need to import data into live surveys, make sure that there is no possibility that there will be a mix-up with the key field. You should especially be cautious when using the system-generated key fields "respid" and "responseid" when importing to a live survey. For example, the field "respid" is generated by the system when you upload respondents to a limited survey. When a respondent is uploaded, the system automatically assigns the next available "respid" in the respondent list. But the system does not check if that "respid" is among responses you have imported, because data import does not touch the respondent list. (Responses and respondent lists are kept separate in the database to be able to keep responses anonymous.) Likewise, it can cause problems when using "responseid" as a key field when uploading to a live survey, because the next available "responseid" is automatically assigned to a response when a respondent enters a survey for the first time. (For open surveys, "respid" is also assigned when the respondent enters the survey.)

When uploading to a panel, you need to start by uploading a respondent list to the panel project. The system will assign "respid"s to the panelists. Then you have to make sure that those system generated respids match the "respid"s in the response file and do the data import of the responses with the corrected "respid" as key field.

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 377: Data import

16.7.1 File names

The file names can use alphanumeric characters(0...9a...zA....Z) and underscore (_). They can not include blanks.

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 16.4.1).

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. E.g. 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.

16.7.2 The import files

The import files have to be tab delimited ASCII files.

The first row has to have the variable names, and they have to correspond with the variable names in Confirmit. 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. (e.g. q1)	The precodes of the answers.
Open	The question id. (e.g. q1)	The text answered (or numbers if numeric property is used)
Multi	The question id + underscore + precode of the item (answer) (e.g. 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) (e.g. 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" (e.g. q3_2_other)	The text answered.

Table 166: Question Labels in Import Files

16.7.3 Upload files

Choose the file by browsing or specify the path of the file. Then click Set properties.

Figure 378: Choose file

Then you have to specify the "Import properties" for this import.

Figure 379: 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 that 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 has to exist in both the import file(s) and the database.
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 16.7.5.
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 167: 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.

16.7.4 Pick up files from server

After selecting "Pick up files from server" you are brought directly to "Import properties".

The screenshot shows a web interface for data import. At the top is a blue header bar with the text "Data Import". Below this is a light gray bar containing the project ID "p0001001". The main area is a form titled "Import properties" with a blue header. The form contains the following fields and options:

- Project ID:** A text field containing "p0001001".
- Import file:** An empty text field.
- Import template:** A dropdown menu showing "All fields".
- Key field:** An empty text field.
- Decimal symbol:** A dropdown menu showing ". (point)".
- Email:** A text field containing "usermanual@firmglobal.com".
- Validate response:** A dropdown menu showing "Yes".
- Type of uploading:** Two radio buttons: "Append" (selected) and "Update" (unselected).

At the bottom of the form is a blue button labeled "Finish".

Figure 380: 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.
Import file	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.
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 that 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 has to exist in both the import file(s) and the database.
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 16.7.5.

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 168: 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.

16.7.5 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 unique key 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.

17 Appendix A: LIMITS

17.1.1.1 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	<i>(same as open text)</i>
Multi with numeric property	<i>(same as open text with numeric property)</i>
Other specify-element ("other" property set in answer list)	Unlimited
Loop	<i>(same as coded questions)</i>

17.1.1.2 Meta data

Question title	255 characters
Question text	Unlimited
Question instructions	Unlimited
Answer/scale texts	2000 characters
Question ids	50 characters

17.1.1.3 Scripts/masks

Script nodes	Unlimited
Validation code	Unlimited
Masks (precode mask, scale mask, column mask)	255 characters

17.1.1.4 Recoded variables

Same as for ordinary question types, except for the extra element

Expression	Unlimited

17.1.1.5 Respondent list

Values uploaded in the respondent list	255 characters

18 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
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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
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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
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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
512	Welsh		cy

19 APPENDIX C: RESERVED KEYWORDS

The following is a list of Reserved Keywords that should not be used as Question IDs.

All questions starting with underscore (_)

responseid

respid

rowguid

r

s

l (unless you want to use it as described in 8.5)

rid

interviewer

c

page

status

interview_start

interview_end

projectid

env

last_handled

callback

interviewerid

tries

never_again

in_use

not_in_quota

iterationid

order

comment

sample_category

noofemailssent

State

state

Only for use in respondentlists:

userid

password

language

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