Forsta Plus v2022

This is revision 1 of the Forsta Plus v2022 Professional and Standard Panels User Guide published in February 2022. The information herein describes Forsta Plus Professional and Standard Panels and its features as of Build nr. 2022.2.12. Note that new features may have been introduced into the product after this build: go to www.forsta.com or check “News” on the Customer Extranet for the latest updates.

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What's New in this Revision?

Note: Only the latest changes to this documentation are listed here. Changes made to earlier revisions are listed in the "Changes to the User Documentation" document which can be downloaded from the company extranet at https://extranet.confirmit.com.

The following changes have been made in revision 1 of the Forsta Plus Horizons v2022 Professional and Standard Panels User Guide:

- The user guide is updated with new logo, company and product names. Note that images will be updated at a later date, and URLs, folder names etc. will be corrected as the changes become applicable.

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

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

1. Introduction

Collecting feedback via the Internet gives tremendous possibilities. You can interview your employees and your customers, and conduct surveys towards your markets, for example mapping the profiles of the people visiting your web site. Within the Market Research industry, many agencies also use Panels to collect data and conduct research.

A panel is a group of people, possibly several million, who have agreed to be available to answer surveys. When a prospective panelist first registers in the panel, he/she will typically answer a registration survey that will log personal and other information such as work-related and household details. This information will allow the research company to pick out of the panel samples of panelists who are suitable to answer particular surveys. For example, if you are conducting a marketing survey for a client company that manufactures dog food, you will probably wish to include only dog-owners in your sample. You can import people directly into the panel if you already have their information.

In Forsta Plus you can build a library of panelist interfaces, called Panel Portals, through which registered and potential panelists can read about your panels and register themselves if necessary. Those who are already registered (members) can log into the Panel Portal to answer new or previously started surveys, view their survey list, update their profile, view their points etc. All these actions are conducted via the same interface.

A Panel can also be used by a company to hold information about its employees and/or customers. You can then send specific people surveys based on the information in the Panel. For example, if you want to send a seminar registration survey to all employees working in a particular city and a particular department, and who have not already attended that seminar, then the panel will give you a sample containing the people matching these criteria, and upload the list to the seminar registration survey.

Forsta Plus contains three "grades" of panel application; Basic panels, Standard Panels and Professional Panels.

- **Basic Panels -** this simple functionality is included as a part of the Professional Authoring application. The Basic Panels functionality is described in the separate Professional Authoring User Guide.
- **Standard Panels -** this is a reduced set of the Professional Panels functionality. If you have a Standard Panels license, use this user guide for information on Standard Panels functionality but be aware that much of the information contained herein will not apply to you.
- **Professional Panels -** the full panels functionality.

This user guide explains the full Professional Panels functionality. Note that this guide should be read in conjunction with the Professional Authoring User Guide, which explains how to create and set up the surveys. Be aware that some functionality described herein, for example FTP import, may need additional licensing.

Note: The Professional Panel functionality is purchased as a separate add-on module within Forsta Plus.

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

1.1. Recommended Limits

Note: The Professional Panels functionality includes no built-in limits. However, due to the time and resources used when processing large databases, you are strongly recommended to keep within the following maximum values:

- Number of panelists – is dependent on the type of license you have:
  - On Premise - up to 10 million.
  - On Demand - up to 5 million. Panels larger than this must be approved in advance by the Forsta On Demand Operations team - contact support@confirmit.com, or an On Premise installation should be considered.
- Survey history – up to 100 million records.
- Maximum number of variables in a panel - 500
- Maximum number of Columns in panel database - 4000

Each single, numeric, date and open text question will occupy one column in the panel database. Multi questions will occupy one column per answer alternative.

- Sampling (Memory on batch server, read from BitStream server and SQL server) – a maximum of 8 dimensions.
- Maximum number of cells in the sampling matrix – 100.000. This is calculated as the number of segments in each dimension multiplied by the number of segments in the other dimensions. For example, if the matrix has 8 dimensions, where the number of segments is n1 in dimension 1, n2 in dimension 2 etc. the total number of cells will be n1*n2*n3*n4*n5*n6*n7*n8. This value must be a maximum of 100.000.
- Be aware that large BitStream generations will use considerable server processing resources, and can cause delays for other users. Large BitStream generations should therefore be performed during off-peak hours.
- BitStream file set generation affects the BitStream server during generation and sampling, and will affect the SQL server (reading) to a lesser degree. Therefore:
  - Limit the number of open text fields included when sampling. BitStream files should only include the fields to be used in filtering and sampling matrices, not the fields you need for the respondent file.
  - Open text fields that are to be part of the BitStream files should be limited to 4 characters.
  - Note that Open text fields are not supported as segments in the sampling matrix.
  - To optimize the panel database: use Boolean data types and numeric codes whenever possible, and numeric ranges between 0 and 255 should be specified.
- The “Panelist registration / update profile project” checkbox in the Project Overview page should only be used for surveys used for panelists signing up for the panel and updating their profile. It must not be used regular data collection (research projects/surveys). If this box is checked for a project, it will be registered in the project log.
- “Sample Only” surveys (add-on) are intended only for access panel providers that sell sample to 3rd parties, for surveys for which the access panel provider does not run the data collection. The surveys used to redirect panelists to external survey links and update status upon survey completion can contain up to 5 additional questions (for example for rating the survey experience etc.), but are not to be used for regular additional data collection.

Note: The actual limits will depend on the hardware configuration currently in use. Contact Forsta Support for further information.

2. General Information

2.1. How to Access Professional Panels

You have two ways of accessing the Professional Panels functionality:

- Go to the **Home > Professional Panels** menu command.
- Click the **Professional Panels** item in the Quick Access pane.

In both cases, the Professional Panel List page opens.

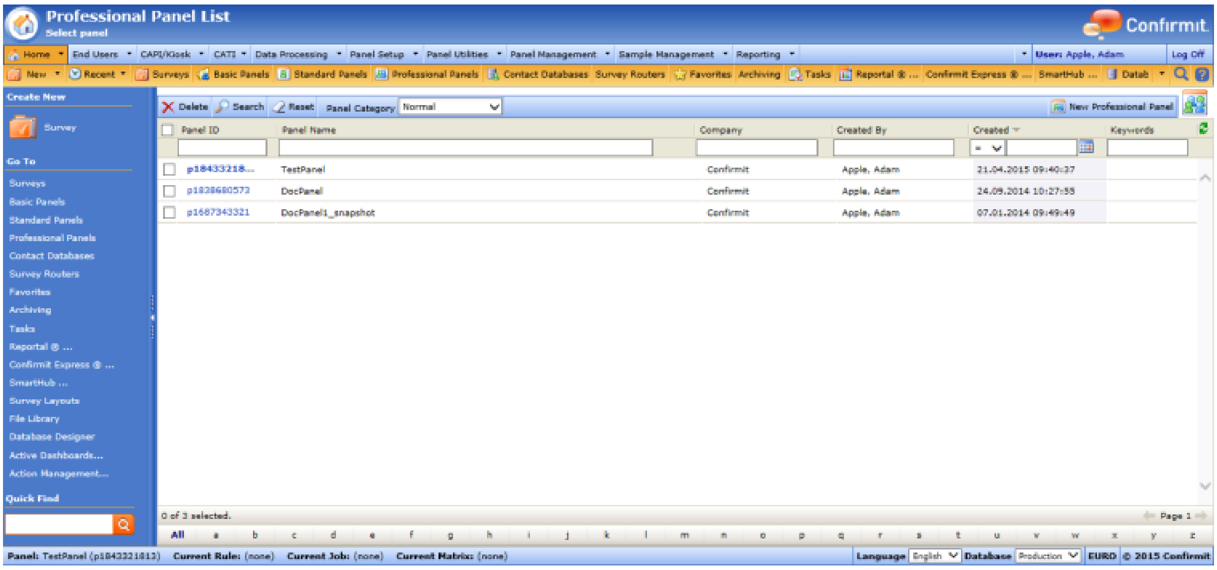


Figure 1 Example of the Professional Panel List page

This page lists the panels currently available to you. These may be panels that you have created or imported, or panels that others have created and given you permission to access. The panel details presented in this list are as follows:

- **Panel ID –** the unique identification number for the panel. This is allocated automatically by Forsta Plus when the panel is first created. This is the link used to access the panel.
- **Panel Name –** the identifying name of the panel, given by the person who created it.
- **Company –** the company registered as the “owner” of the panel.
- **Created By –** the name of the person who created the panel.
- **Created –** the date and time the panel was created.
- **Keywords –** you can register keywords for a panel to make it simpler to locate when the panel list is extensive.

To open a panel, click on its blue **Panel ID** link. The Panel Overview page for the selected panel opens (see Overview on page 28 for more information). Note that this page is also accessible via the **Panel Utilities > Overview** menu command. To create a new panel, click the **New Professional Panel** button (see How to Create a New Professional Panel on page 3 for more information). To import a panel and selected rules, matrices etc. from a different site, click the **Import Remote Panel** button.

2.2. How to Create a New Professional Panel

To create a new Professional Panel:

1. Go to the Professional Panels List page by clicking the **Home > Professional Panels** menu command or by clicking the **Professional Panels** item in the Quick Access pane.
2. Click the **New Professional Panel** button (located at the right end of the page's toolbar.)

The New Professional Panel overlay opens.

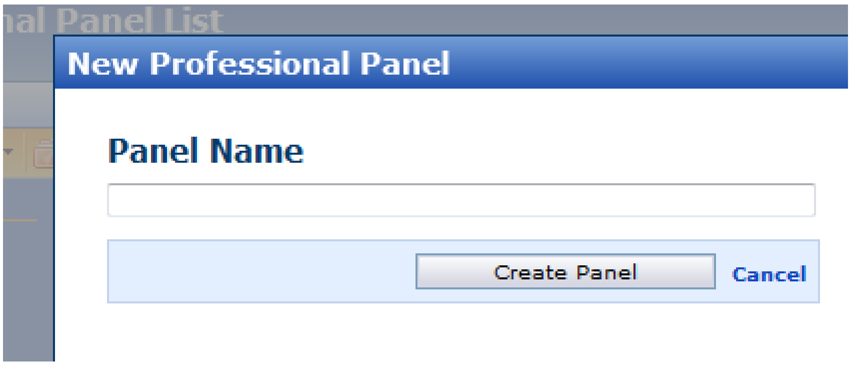


Figure 2 The Professional Panel Name overlay

3. Type the desired name of the panel into the field.
4. Click **Create Panel**.

   The Professional Panel is created and added to the list in the Professional Panels List page. The Panel Overview page opens (see Overview on page 28 for more information). Here you can add languages, categories and keywords and edit the email address for error messages. To assist the user with creating the panel, new panels will be created with a set of default Aggregated Variables. These variables are editable by users after the panel is created.

2.3. How to Import a Panel from a Remote Site

This functionality enables you to import a Professional Panel from another site. The functionality includes importing Portals, Rules, Rule Sets, Matrices and Linked Projects, and also re-maps to new projectIds and/or ruleIds.

You can perform a remote import on only Portals, Rules and Matrices, but in this case re-mapping of ids will not be performed. No data will be transferred during a remote import.

Note: This functionality can also be used to duplicate a panel and all its related objects on the same server.

To import a panel from a remote site:

1. Go to the Professional Panels list, and click the **Import Remote Panel** button located towards the right end of the list toolbar.

   The Import Remote Panel overlay opens.

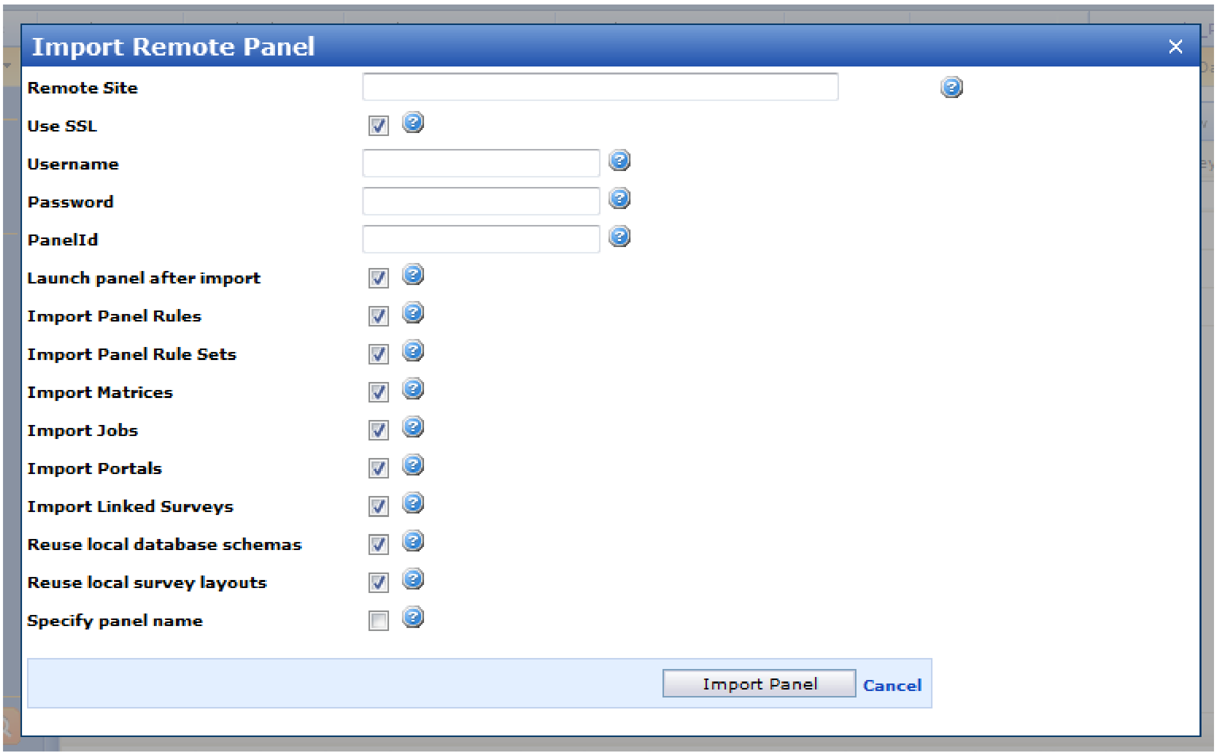


Figure 3 The Import Remote Panel overlay

2. Select the site you wish to import from.
3. Add the user name and password for that remote site.
4. Select or deselect the other items as necessary (see Properties on the Import Remote Panel Overlay on page 5 for more information).
5. Click **Import Panel**.

   The panel and any select associated functionality is imported and the panel is added to the Panel List.

Important
Once you have imported everything, complete the registration survey (if it exists) and run the BS rule (if it exists). If you do not do this and the selected data source on the matrices and jobs does not exist, the data source will be cleared when you open and save the matrices and jobs.

2.3.1. Properties on the Import Remote Panel Overlay

The properties and settings are as follows:

- **Remote Site -** type in the domain name of the remote Forsta site you want to import from (for example author.euro.forsta.com).
- **Use SSL -** select whether the transfer should be conducted using an encrypted channel.

Note: The remote host you are connecting to must support HTTPS for this to work.

- **Username -** the username at the remote Forsta site you want to connect as.

Note: This user must have the SYSTEM_API_ACCESS permission at the remote site and read-access to the schema you are trying to retrieve.

- **Password -** the corresponding password for your user at the remote Forsta site.
- **PanelId -** the id on the remote site of the panel you want to import.

Note: You must have read permission to the panel you want to import.

- **Launch panel after import -** select whether you want the database to be generated automatically once the panel has been imported.
- **Import Panel Rules -** select if you would like to import all panel rules for specified panel. A maximum of 50 Rules can be imported, sorted by LastExecuted.
- **Import Panel Rule Sets -** select if you would like to import all panel rule sets for specified panel. A maximum of 50 RuleSets can be imported, sorted by LastExecuted.
- **Import Matrices -** select if you would like to import all matrices for specified panel. A maximum of 50 Matrices can be imported, sorted by LastUsed.
- **Import Jobs -** select if you would like to import all jobs for specified panel. A maximum of 50 jobs can be imported, sorted by Modified.
- **Import Portals -** select if you would like to import all portals for specified panel.
- **Import Linked Surveys -** select if you would like to import all linked surveys for specified panel. A maximum of 10 linked surveys can be imported.
- **Reuse local database schemas -** if enabled, this will attempt to find a local database schema which has the same name as the schema associated with the remote survey. If such a schema is found, the local schema will be used rather than importing the remote schema. When this checkbox is disabled, a schema in a remote survey will always be imported, irrespective of how many times you import the survey.
- **Reuse local survey layouts -** if enabled, this will attempt to find a local survey layout with the same name as the survey layout used by the remote survey(s). If such a survey layout is found, the local survey layout will be used rather than importing the remote survey layout.
- **Specify panel name -** if you want to import the panel using a name different from that used on the remote Forsta site, check this box and input your own name. If not, leave this unchecked.

2.4. Disabled Features

When a new Professional Panel is created, some features that are not used very often will be hidden by default. These features can be activated in the Panel Settings page (see The Panel Settings Features Tab on page 120 for more information).

2.5. The Search Facility

In an established company the list of registered panels may run into thousands, and a search through the list for the one panel that you wish to use could be time-consuming. Forsta Plus therefore provides you with a set of filters so you can reduce a long list to a manageable size.

- **Panel Category –** Click the down arrow beside the field to open a drop-down list of the panel categories, select the appropriate category from the list and click Search. The list is reduced to only those panels that have the selected category.

Note: You do not need to type the entire name or number into the appropriate field – in most cases the first few characters will tend to reduce the list considerably.

- **Panel ID –** type in part or all of the required panel's ID number.
- **Panel Name –** type in the company name.
- **Company** – allows you to search for panels according to the company under which it is registered.
- **Created By** – allows you to search for panels created by specific users.
- **Created**– Select an operator and a date to search for, for example any panels created on or before a certain date.
- **Keywords** – type a key word into the field to search for all panels with that word registered as a keyword.

2.6. Password Policy

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

General:

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

The Authoring (Express and Professional), Reportal and Panel Portal modules all have ‘Forgotten Password’ functionality. In the event a user or end user forgets his/her password, clicking the **Forgot Password** button requests an email with a link that opens a page where they can reset the password. Note that the reset password link is time-limited and only valid for one hour. If the user does not reset their password within that time then they must re-click the button to be sent a new link. Refer to the Forsta Plus Professional Authoring User Guide for further details.

All passwords are hashed and not transmitted in plain text, including those for panelists in Professional, Standard and Basic Panel. Consequently, passwords will not be available in plain text for any system users. Instead, users will be sent an activation link to open a page where they can choose their own password.

Panelists:

The changes to the password policy for panelists are optional, and users must actively enable the restrictions for Basic and Professional Panels (see The Panel Settings on page 119 for more information). Users may then define custom settings for a panel. Panelist passwords will be hashed, meaning that passwords will not be available in plain text. When panelists use the “Forgot password” feature, they will be sent an activation link which will open a page where they can reset their password.

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

On-Demand users:

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

- **Password history** - the new password must be different from the last 12 passwords.
- **Minimum age** - the user will have to wait 24 hours after changing the password before being allowed to change it again.
- **Maximum number of login attempts** - after 5 invalid login attempts the account will be locked. The user will not be allowed to login again until the account is reactivated by the system administrator in the single panelist editor page (see Single Panelist Editor on page 100 for more information).
- **Uppercase characters** - the password must contain at least 1 uppercase letter.
- **Non-alpha characters** - the password must contain at least 1 character that is not a letter (a..z, A..Z).
- **Password length** - the password must contain at least 8 characters.
- **Password expiry days** - the password will expire after 60 days. (This will not apply for login to the CAPI console.)

For Authoring users, it is possible to enforce even stricter requirements through certain company settings. Contact Forsta support if you wish to implement a stricter policy.

On-Premise users:

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

- **Password history** - the new password must be different from the last X passwords.
- **Minimum age** - the user will have to wait X hours after changing the password before being allowed to change it again.
- **Maximum number of login attempts** - after X invalid login attempts the account will be locked. The user will not be allowed to login again until the account is reactivated by the system administrator in the single panelist editor page (see Single Panelist Editor on page 100 for more information).
- **Non-alpha-numeric characters** - a required minimum number of characters that are not numbers (0..9) or letters (a..z, A..Z).

- **Uppercase characters** - a required minimum number of uppercase letters.
- **Non-alpha characters** - a required minimum number of characters that are not letters (a..z, A..Z).
- **Password length** - a required minimum number of characters in the password.
- **Password expiry days** - the password will expire after a number of days. (This will not apply for login to the CAPI console.)
- **Password strength** - in addition to a combination of the above settings, a regular expression may be used to enforce an even stricter policy.

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

2.7. CATI Support

Professional Panels supports CATI channel surveys, allowing sample uploads to appear in the CATI system for interviewing.

Three scheduling options are available for respondent uploads for CATI-enabled surveys. When sample is loaded from Professional Panel, the system will use the default value (No scheduling) and there is no option to change this.

3. The Menus

To open a panel, click on the blue **Panel ID** link in the Professional Panel List. The Panel Overview page for the selected panel opens, and the Panel menus become available.

3.1. The Panel Setup Menu

The Panel Setup menu contains the menu commands required by the user while designing and editing the Panel Portals database.

Note: The design and creation of a Panel Portal database is essentially the same as for a "normal" questionnaire database. This document therefore describes only the differences between a Panel Portal database and a questionnaire database, and the additional procedures required. For further information on designing and creating a database, refer to the separate Professional Authoring User Manual.

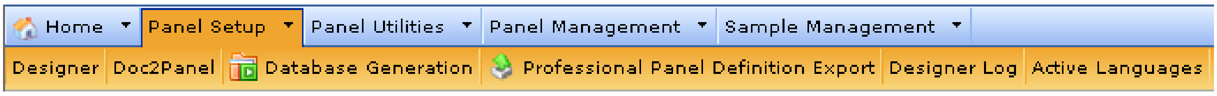


Figure 4 The Panel Setup menu commands

The menu commands are as follows:

- **Designer** – the database definition page (see Designer on page 12 for more information).
- **Doc2Panel -** is an authoring mode that allows panel designers to quickly and easily create panels from documents. It enables you to copy a Word document into a scratch-pad-like browser. From here you can then select the texts you wish to use for questions, answers etc. and convert them directly into a Forsta Plus panel. For further information on this functionality, refer to the separate Professional Authoring User Guide.
- **Database Generation –** generates and updates the database (see Database Generation on page 24 for more information).
- **Professional Panel Definition Export –** export the database definition to another server (see Professional Panel Definition Export on page 25 for more information).
- **Designer Log –** a "read-only" log of the main events occurring in the panel (see Designer Log on page 26 for more information).
- **Active Languages –** select the languages to be used (see Active Languages on page 26 for more information).
- **Legacy Jobs Import** - allows company administrators to import legacy jobs into the Forsta Plus panel from other systems (see Legacy Jobs Import on page 27 for more information).

3.2. The Panel Utilities Menu

The Panel Utilities functions allow you to create and manage your panels.

Once you have accessed the Professional Panels functionality (see How to Access Professional Panels on page 3 for more information) the Panel Utilities menu appears as shown below.

Figure 5 The Panel Utilities menu commands

The menu commands are as follows:

- **Overview –** provides general information on the selected panel (see Overview on page 28 for more information).
- **Linked Projects -** provides a Linked Projects list, which gives you an overview of all the projects that are linked to the panel (see Linked Surveys on page 33 for more information).

- **Panel Portals** – contains the commands you use to create and edit your Panel Portals (see Panel Portals on page 35 for more information).
- **Panel Activity Log –** logs activity on the panel (see Panel Activity Log on page 69 for more information).
- **Database Cleanup –** removes deleted questions from the Panel database (see Database Cleanup on page 71 for more information).
- **Survey Synchronization –** initiates a new task that checks all surveys associated with the current panel, and updates the panel if/when there are changes. This is to keep the panel data up-to-date so samples can be selected appropriately. This task can (should) be made recurring so it occurs automatically (see Survey Synchronization on page 72 for more information).
- **Flex Extensions -** opens the "Extensions available..." list. Refer to the Authoring User Guide for further information on Flex Extensions.

3.3. The Panel Management Menu

The Panel Management menu contains the commands used to create and edit the rules that define the panels and specify the panelists.

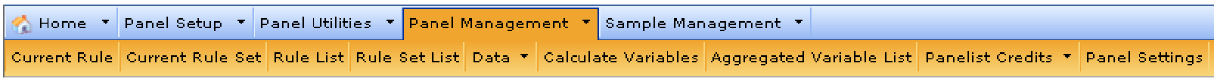


Figure 6 The Panel Management menu commands

The menu commands are as follows:

- **Single Panelist Editor –** enables you to edit individual panelist's details (see Single Panelist Editor on page 100 for more information).
- **Multiple Panelist Editor –** enables you to edit the details of several/many panelists simultaneously (see Multiple Panelist Editor on page 106 for more information).
- **Current Rule –** shows the details of the rule currently selected in the Rule List (see Current Rule on page 73 for more information).
- **Current Rule Set –** provides details of the rule set currently selected in the Rule Set List (see Current Rule Set on page 91 for more information).
- **Rule List –** displays a list of the available rules. Click on a rule to open it (see Rule List on page 94 for more information).
- **Rule Set List –** displays a list of the available rule sets (see Rule Set List on page 97 for more information).
- **Aggregated Variable List –** lists variables you have created to be used in aggregate queries to update the Panelist table based on information in the Survey History table (see Aggregated Variable List on page 98 for more information).
- **Panelist Credits** - allows you to import and export panelist credits (see Panelist Credits on page **Error! Bookmark not defined.** for more information).
- **Panel Settings -** allows you to define some custom settings for the panelists' password requirements (see The Panel Settings on page 119 for more information).

3.4. The Sample Management Menu

A Sample is a group of panelists selected from the panel using sampling criteria. The sampling criteria are set such that the sample is suitable to be respondents for a particular survey. For example, a sample selected to reply to a survey produced on behalf of a car manufacturer might comprise of males between the ages of 20 and 30 who live in a particular part of the country and who drive a particular make of car.

The Sample Management functions allow you to create and manage samples.

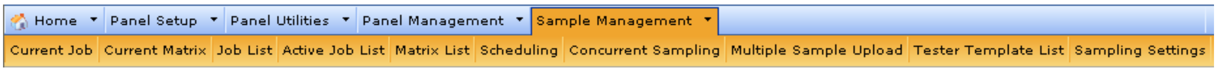


Figure 7 The Sample Management menu commands

The menu commands are as follows:

- **Current Job –** opens the Current Job window. This window provides general information about the selected job. Use this window to define and edit the criteria for the job (see Current Job on page 124 for more information).
- **Current Matrix –** this window shows the details of the matrix currently selected in the Matrix List (see Current Matrix on page 173 for more information).
- **Job List –** lists all the sampling jobs that you currently have “in progress” (see Job List on page 188 for more information).
- **Active Job List –** lists all the sampling jobs that are currently “in production” (see Active Job List on page **Error! Bookmark not defined.** for more information).
- **Matrix List –** lists all the matrices currently available in your Forsta Plus database (see Matrix List on page 193 for more information).
- **Scheduling –** lists the jobs that are awaiting execution and those that have been run (see Scheduling on page 195 for more information).
- **Concurrent Sampling –** enables you to run several sampling jobs simultaneously so scarce panelist resources can be allocated fairly across the jobs (see Concurrent Sampling on page 198 for more information).
- **Multiple Sample Upload** – enables you to upload several jobs simultaneously (see Multiple Sample Upload on page 200 for more information).
- **Tester Template List –** templates that enable you to add rows to the respondent database that you can then populate with “dummy” respondent information such that you can test the survey and the system setup before you send it out to the actual respondents (see Tester Template List on page 201 for more information).
- **Sampling Settings –** allows you to set default values and rules for the panel (see Sampling Settings on page 202 for more information).

The following chapters in this manual describe the menu commands’ functionality, and the processes and procedures conducted via these menu commands. The menu commands are described in the order in which they appear in the menus.

4. The Panel Setup Menu

The Panel Setup menu contains the menu commands required by the user while designing and editing the Panel Portals database.

Note: The design and creation of a Panel Portal database is essentially the same as for a "normal" questionnaire database. This chapter therefore describes only the differences between the functions, procedures and properties available when creating a Panel Portal database and those available when creating a questionnaire database. For further information on designing and creating a database, refer to the separate Professional Authoring User Guide.

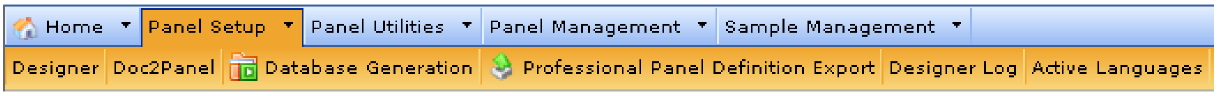


Figure 8 The Panel Setup menu commands

4.1. Designer

Select this menu command to open the Designer page. Use this page to create and edit the panel database. The page is divided into two main areas:

- **The Toolbox column –**the toolboxes that appear in the left column in the Designer page provide an overview of the panel database and the objects available for use while creating or editing it. The toolboxes are displayed and available throughout the process. The toolbox is divided into three sections:
  - **The Panel Variables toolbox –** shows the layout of the current database. Edit the database here, adding, deleting and/or moving objects as necessary. After any changes are made, the database must be re-generated (see Database Generation on page 24 for more information). Note that each "question" in the Panel Variables toolbox will become a column in the database.
  - **The New Objects toolbox –** lists the objects you can use in the database. Drag and drop objects from here to the Panel Variables toolbox.
  - **The Secondary Project toolbox** - you have the possibility to copy questions from other panels into the current panel. This can be done in the Secondary Project toolbox. Projects in this toolbox will be displayed in Read Only mode.
- **The Question Details area –** double-click on a question in the Panel Variables toolbox to show the details of that question in the Question Details area. Use the tabs and data fields in this area to set up each question in the database.

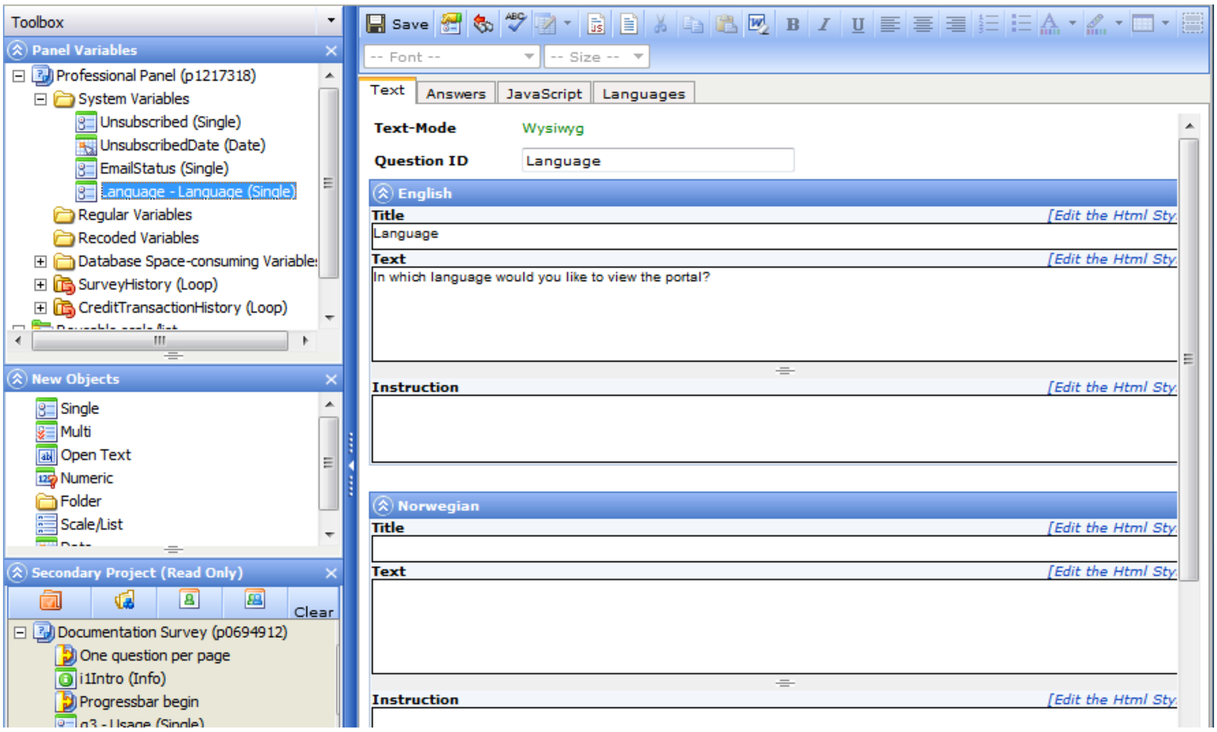


Figure 9 Example of the Professional Designer page

For further information, refer to the separate Professional Authoring User Guide.

4.1.1. The Panel Variables Toolbox

This toolbox is where you create and edit the panel database.

You build your database in the toolbox by creating Objects (questions, i.e. the database columns). All objects placed between the survey name and the “Reusable Scale/List” folder will be used in the database. The objects available for you to use are listed in the New Objects toolbox. The database columns will be listed in the order in which they are placed in this tree.

When you first create a new Professional Panel (see How to Create a New Professional Panel on page 3 for more information), the "standard" folders are created along with some basic variables.

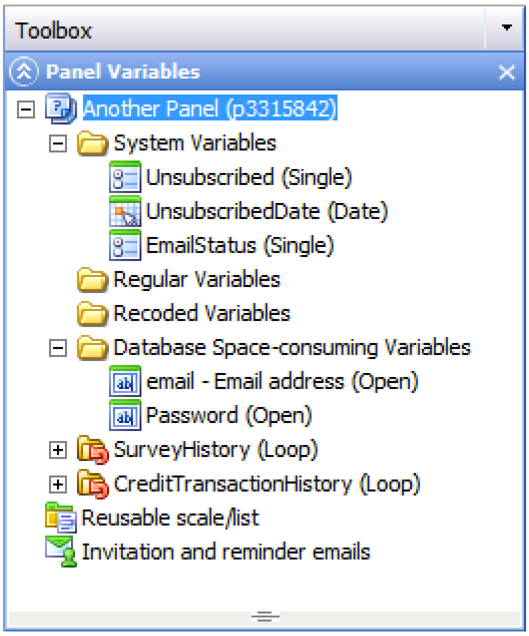


Figure 10 The Panel Variables toolbox as initially created

You can add folders and objects as required to the toolbox.

4.1.1.1. How to Add an Object to the Tree

There are five methods of creating objects:

- **Insert Inside –** use to create the first question in a panel database, or to create an object inside another, typically folders. Right-click on the panel/folder name and choose **Insert Inside**, then select from the resulting list the object you wish to create.
- **Insert After –** use to create objects in a project after an existing object. Right-click on the object after which you wish to create the new object, choose **Insert After**, then select from the resulting list the object you wish to create.
- **Drag and Drop –** use standard Windows drag-and-drop techniques to copy objects from the New Object toolbox into the Panel Variables toolbox.
- **Duplicate –** copies an existing question. This would be useful if you have two or more questions that are similar in layout and/or content. Create and set up the first question, then duplicate it and edit the copy as required.
- **Dragging/Copying from the Secondary Projects toolbox** - you can copy questions into the current questionnaire by dragging them from the secondary project toolbox and dropping them into the questionnaire tree. Before copying, you can view the Secondary Project objects in Edit mode.

You can use any of the above methods to create any object in the database. For further information, refer to the separate Professional Authoring User Manual.

4.1.1.2. How to Delete an Object from the Tree

To delete an object, select it and press the **<DEL>** key on your keyboard, or right-click on the object and select **Delete** from the menu. This will remove the selected objects from the routing, and set the *Deleted* flag on the objects to true.

4.1.1.3. How to Undelete an Object

If you delete a question from the tree and later wish to reinstate it, you can do this as long as the question has not been removed completely by the Database Cleanup function (see Database Cleanup on page 71 for more information).

1. In the Panel Variables toolbox, right-click on the Panel name text and select **Show Deleted** from the menu.

   This shows any deleted questions.

2. Right-click on the question and select **Undelete**.

   Or

   Right-click on the question and select **Properties** from the menu, then uncheck the **Deleted** box in the questions Properties page.

4.1.1.4. The System Variables

The System Variables are default fields that are added to the database Professional Panel is created. These are as follows:

- **Unsubscribed -** indicates whether the panelist has opted out from the panel.
- **UnsubscribedDate -** a date field that indicates the date on which the panelist opted out from the panel.

Note: When set up correctly, the Unsubscribe variables will allow the panelist to opt-out of the panel in the event he/she wishes to do so. However these variables must be set up "manually" by the user creating the panel, and the setup will depend on the desired procedure for opting out, at what point in the survey the panelist can unsubscribe, how the unsubscribe data is to be processed and used etc. Note that the ForstaFlex Email Opt-Out extension has been specifically created to enable the user to include opt-out links in the invitation emails and process the opt-out data (when the panelist wishes to unsubscribe, for specific surveys or all surveys, for specific panels and/or for specific survey companies etc.). Contact Forsta Support at support@confirmit.com for further details.
The Unsubscribe fields are only updated if the Opt-Out Flex Extension is used. Refer to the Flex Extension User Guide for further details.

- **EmailStatus -** a single field that indicates the status of the panelist's email address. When you create a sample, upload it to a survey and distribute the invitations to the respondents, the Email Delivery Report will be created for these respondents in the survey. The delivery status from this survey will also be flagged in the panel survey, i.e. the respondent table for the panelist will be updated in the panel survey with this status. The EmailStatus variable can have 3 values:
  - **Valid –** if the receiving server responds with a message with a SMTP code under 400, the email address is Valid.
  - **Error (Permanent Error) –** if the receiving server responds with a SMTP code between 500 and 599, this means a “Permanent Error” has occurred.
  - **TempError (Temporary Failure) –** if the receiving server responds with a SMTP code between 400 and 499, this means a “Temporary Failure” has occurred.

4.1.1.5. The Survey History Core Fields

The "Core fields" are the default fields that are always included in the database. These are as follows:

- **SurveyID** - indicates the id of the survey.
- **SurveyStatus** – indicates the current status of the panelist in the survey. The options are:
  - **Reserved** – the panelist is selected for a job but the invitation email has not yet been sent (a short-term status).
  - **Invited** – an invitation to participate in the survey has been sent to the panelist but the panelist has not yet accessed the survey.
  - **In Progress** – the panelist has started the survey but has not yet completed it.
  - **Completed** – the panelist has completed the job.
  - **Stopped By System** – the panelist has been prevented from completing the survey by the system. Possible reasons include "quota full", "screened" (the panelist may for example be outside the requirements for the survey) or an error status from the survey.
- **ReservedDate** – the date the panelist was reserved for the job.
- **InvitationDate** – the date the panelists are given access to the survey.
- **StartDate** – the date the panelist first opens the survey.
- **CompletedDate** – the date the panelist completes the survey.
- **SubSampleNumber** – refers to the sub-sample number code the panelist was selected under.
- **GroupNumber** – refers to the group number code the panelist was selected under.

- **JobIsClosed** – specifies whether or not the job is closed.
- **RunNumber -** the number of panel selection runs.

Note: The Survey Status options are stored in the database numerically. If the data is exported, the values will be as follows: Reserved = 0. Invited = 1. In Progress = 2. Completed = 3. Stopped = 9.

4.1.1.6. The Credit Transaction History Core Fields

This loop folder contains a number of core fields relevant to credit transactions. These fields are created automatically when the panel is created.

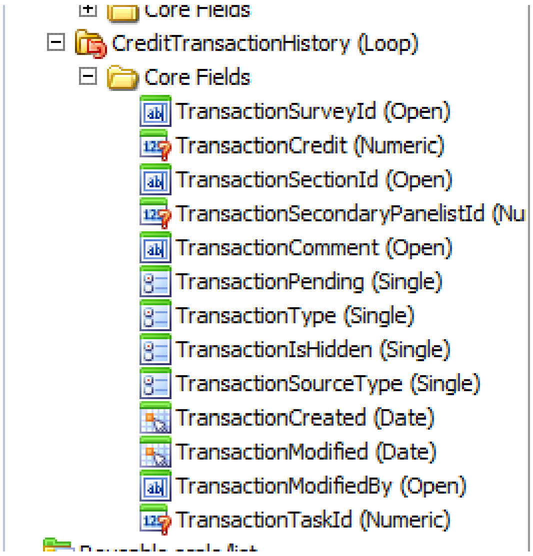


Figure 11 The Credit Transaction History core fields

The fields are as follows:

- **TransactionSurveyId -** the ID of the survey for which the credit transaction has been made.
- **TransactionCredit -** the "value" of the credit transaction.
- **TransactionSectionId** - id used if credits are assigned multiple times from one project.
- **TransactionSecondaryPanelist** - if points are received from another panelist (for example "referrals"), this is the panelist id of the panelist who gave the points.
- **TransactionComment -** any comments that may have been attached to the transaction.
- **TransactionPending** - a transaction is "pending" in a survey until the respondent has been given a status in that survey. Is the transaction pending? (true/false).
- **TransactionType -** why the transaction has been made; a normal update, a correction to the current value, some credit has expired etc.
- **TransactionIsHidden -** is the transaction hidden; true or false.
- **TransactionSourceType -** the type of source where the transaction originated.
- **TransactionCreated -** the date the transaction was created.
- **TransactionModified -** the date the transaction was modified.
- **TransactionModifiedBy -** if the transaction has been modified, who it was modified by.
- **TransactionTaskId -** the ID of the server task performing the transaction.

4.1.1.7. Invitation and Reminder Emails

The Invitation and Reminder Email folder in the Panel Variables toolbox allows you to store directly in the panel the email texts and setups that will be used when distributing the survey to the panelists. You can create as many email objects as you need.

To add an email to the container:

1. Drag-and-drop an Email object from the New Objects toolbox, or right-click on the container and select **Insert Email** from the drop-down menu.

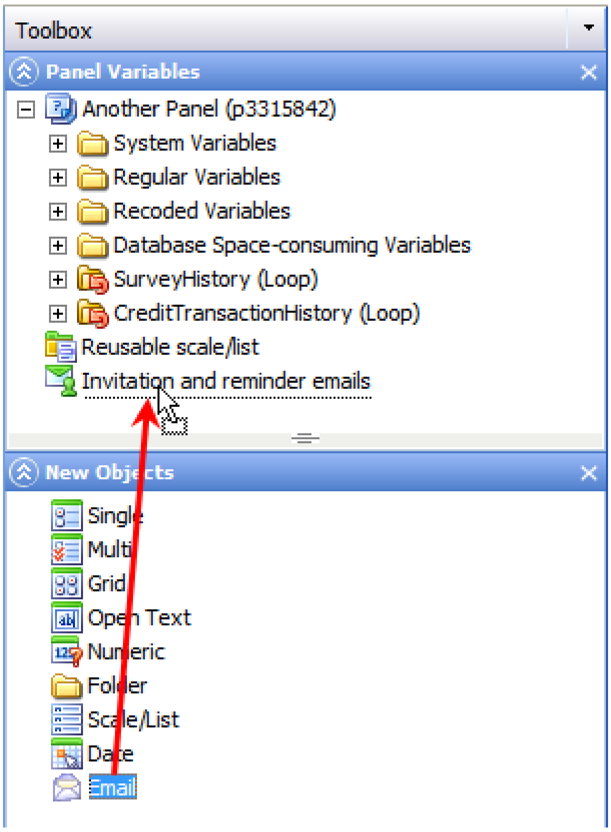


Figure 12 Dragging an Email object from the New Objects toolbox

The email object is created and the Email Details page opens. To edit an existing email object, either double-click on it or right-click on it and choose Edit from the menu.

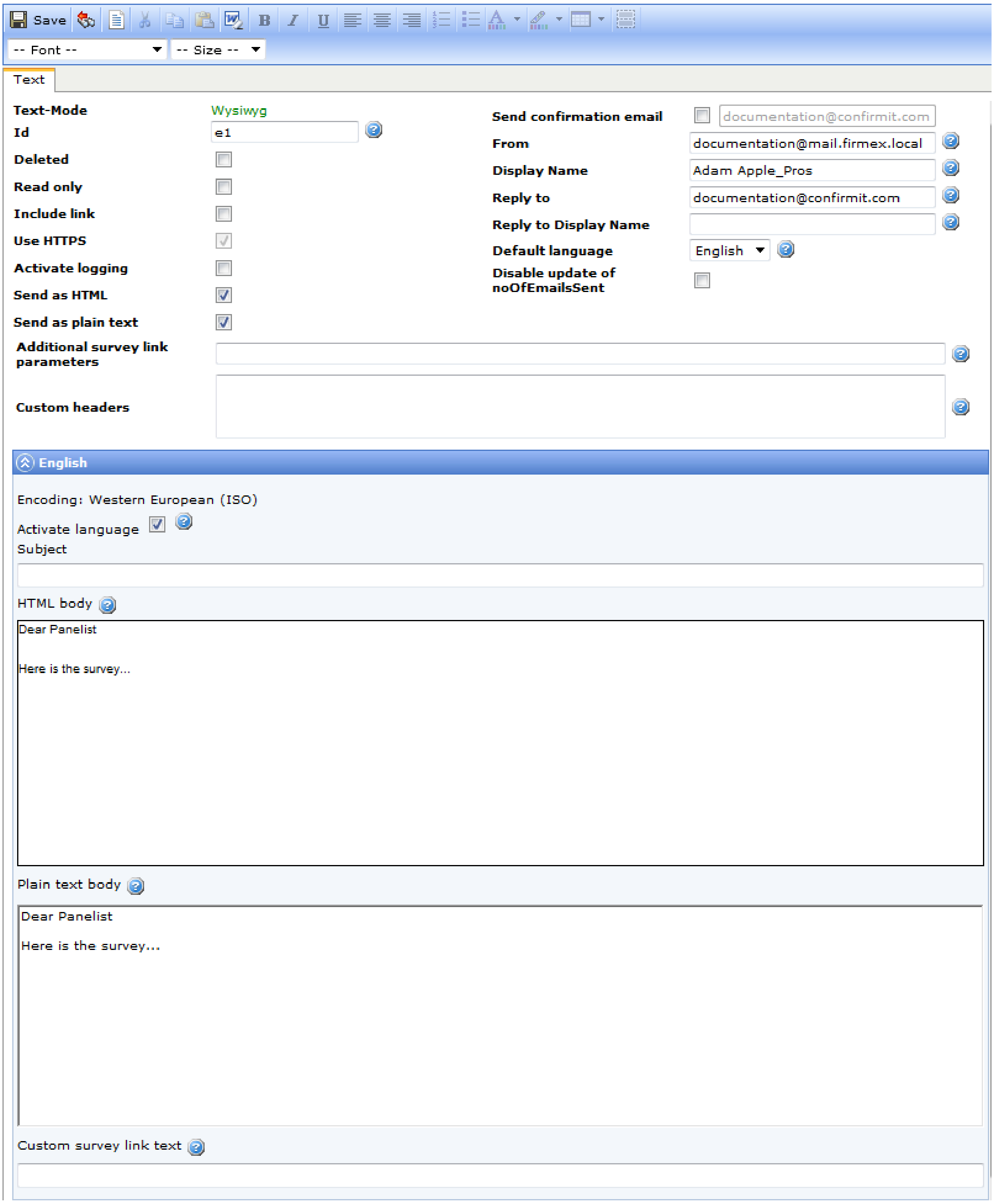


Figure 13 The Email Details page for a panel email

2. Make the selections and settings as required (see The Email Details Page Properties and Fields on page 19 for more information), and write the text of the email.

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

3. On completion, save the changes.

For further details on using emails in Forsta Plus, refer to the separate Professional Authoring User Guide.

4.1.1.8. The Email Details Page Properties and Fields

- **Text Mode -** indicates the current text editing mode. Click the toggle button in the toolbar to switch between Wysiwyg and Html Source modes.
- **Id** – displays the name/title of the current email object. This is the Id of this email object, as displayed in the Questionnaire Tree. The character string in this field is used to specify which email is to be used when sending an email, or changing a recurring task. The default values are “e1”, “e2”, etc. Click in the field to edit the text and enter a more descriptive title.
- **Deleted** – will be chosen if the email object is soft-deleted. If you uncheck the Deleted option, the email object will be undeleted.
- **Read only** – choose this setting if you want the email object to be locked so that no changes are made to it accidentally, either in questionnaire editing mode or when sending email in **Respondents > Emailing**.
- **Include link** – check this box to have a link (URL) to the web interview included automatically at the bottom of the e-mail (default).
- **Use HTTPS** – the URLs will use https:// for secure links instead of http://.

Note: On-Premise Customers must configure the system to support HTTPS to enable this option. This option will be activated after you have chosen the Include link option. For further details about the security systems that are available, and those that are used in Forsta Plus, go to http://extranet.confirmit.com/library/security.aspx.

- Activate Logging -
- **Send as HTML** – check to send the email as HTML code. Only mail clients that support HTML will be able to read the email.
- **Send as plain text** – check to send the email as plain text. Most mail clients will be able to read it.

  The email object will have two text fields for each language: one for HTML body and one for Plain text body. When sending email to respondents, you can choose to send the email either in one of those formats or in both in one sending. When you choose to distribute the **email in both formats**, the mail clients supporting HTML will use the HTML version, other mail clients will display the text version.

- **Send confirmation email** – check this option if you want to receive confirmation email from the system, stating that the emails have been sent. The default email address is that of the current user - yours; edit as appropriate.
- **From** - this shows the email address from which the email will be sent, default will be the address of the currently logged on user - you. You can change this if required.
- **Display Name** - The value entered in this field will be displayed in the 'From' field in the email. If nothing is entered in this field, the recipient will see the email address/name entered in the **From** field. Specify a valid email address in the **Reply to** field. When the receiver clicks his/her 'Reply to' button, the email will go to this email address .
- **Reply to** - specify a valid email address in this field. When the receiver clicks the 'Reply to' button, the email will go to this email address.
- **Reply to Display Name -** the name entered in this field will be displayed in the ‘To’ field when the receiver clicks the **Reply to** button. If nothing is supplied, the name entered in ‘Display Name’ will be used. For example, the ‘Reply to Display Name’ could be set to ‘DO NOT REPLY’.
- **Default language** - if respondents do not have a language specified in the ‘language’ column in the respondent list, if their language is not activated with the **Activate language** setting, or if it does not exist in the current email, they will receive the email in the **default language** selected here. This list contains all the languages selected for the survey. If you set default language to 'None', respondents who do not match any of the activated languages, will not receive any email.
- **Disable update of noOfEmailsSent** - in the event you wish to prevent the email counter from registering the email transmission (for example you may be sending reminders to respondents' managers etc. - see Override Recipient Email above), check this box to disable the Number of Emails Sent column.
- **Additional survey link parameters** - allows you to add custom parameters after the survey link. An example could be:

  ```
  http://survey.confirmit.com/wix/pXXXXXXXXX.aspx?__sid__=encryptedid&co
  de=1
  ```

where **code=1** is the additional parameter. This could previously be achieved by constructing the URL by piping in **^sid^**and **^respid^**, however this was not possible with encrypted system request parameters in the URL. This field allows you to include additional URL parameters in the survey link in email when using encrypted system request parameters. The field supports piping from the respondent list (with ^s). It works both for piped links (with ^slink^ or ^secureslink^) and when the "include link" checkbox is selected.

- **Custom headers** - use this field to add custom headers to the email. The syntax is:

  X-name:value

  X-name2:value2

  You can use piping to "personalize" the email. Here the syntax is:

  X-name:^pipedValue^

  These headers will be added after the internal Forsta headers. Note that you cannot use the X-Forsta prefix in custom headers.

- **Custom survey link text** - (located at the bottom of the page) allows you to insert clickable text instead of the survey URL in HTML email. Note that this applies only to HTML email. This could previously be done by constructing the URL by piping in ^sid^ and ^respid^, but it was not possible with encrypted system request parameters in the URLs. This field makes it much simpler to create a text such as "Click here to take the survey", or even include an image tag. The correct < a href=---> tag will be created in the HTML. This works both for piped links (with ^slink^ or ^secureslink^) and when the "include link" checkbox is selected.

4.1.2. The New Objects Toolbox

This toolbox contains the templates for the objects that can be used in the database. Note that the range of options available here is much reduced from that available in the standard Professional Authoring toolbox.

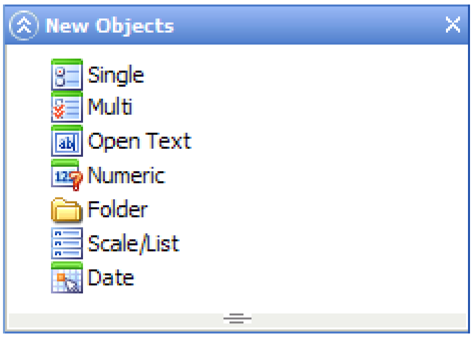


Figure 14 The objects available in the New Objects toolbox

4.1.3. The Secondary Project Toolbox

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

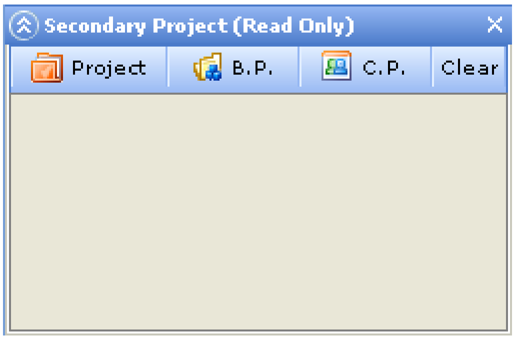


Figure 15 The Secondary Project toolbox

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

When you click the **Project**, **B.P.** or **C.P.** buttons, a Panel List overlay displaying all projects or panels is displayed.

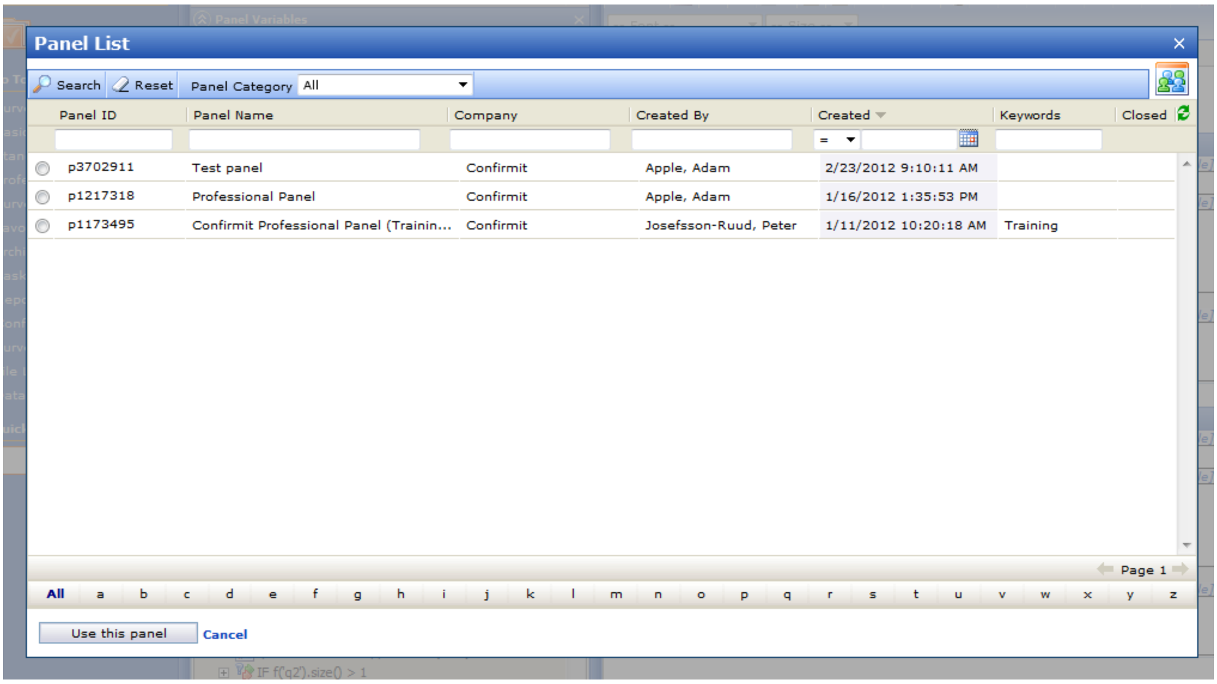


Figure 16 Example of the Project List pop-up

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

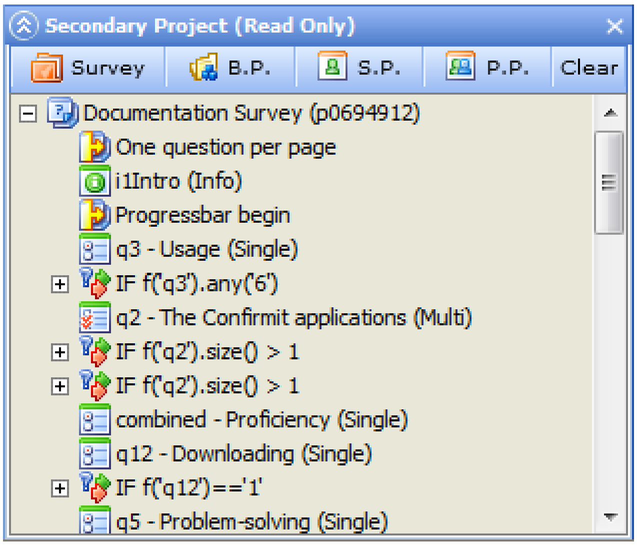


Figure 17 Example of the Secondary Project questionnaire tree

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

4.1.4. The Question Details Page

The Question Details page is where you add text and answer options to the question. The functionality here is identical to that in a standard Forsta Plus survey. Refer to the separate Professional Authoring User Guide for further information.

4.1.4.1. Question Properties

The question objects in the Panel Variables toolbox have a range of properties and settings that you can customized via the property sheets. The property sheet will always display the type and name/title of the active object. To open the Properties pane for a question:

- In the Panel Variables toolbox, right-click on the question and select **Properties**.

  Or

- Double-click on the question or right-click on it and select **Edit** to open the Question Details page, then click the **Show/Hide Properties** button in the Details page toolbar.

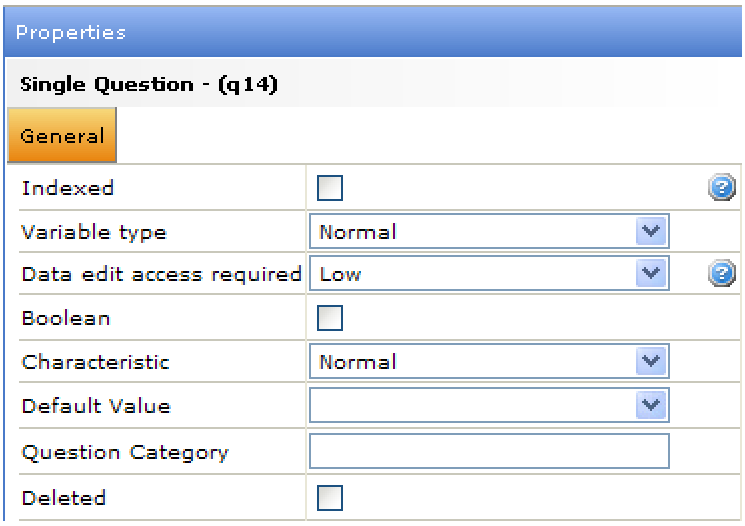


Figure 18 The Properties pane for a Single question

Note: The Properties pane contains different properties depending on the type of question and the property selections made. The list below describes all the properties that may appear.

The properties available are:

- **Field Width –** specifies the number of characters assigned to responses to this question in the database and when exporting to fixed-width ASCII files. The default Field Width for Single questions is 32 characters. If the Field Width is not defined for an Open text question, it will be unlimited. If defined, the respondent will be prevented from entering more characters than the specified in Field width.
- **Indexed –** if selected, an index is created on this field in the database the next time you generate the database. Indexes improve performance in areas such as 1) aggregated and verbatim reporting when filtering on fields with indexes, 2) searching in individual reporting and in survey data editing (when search fields are indexed), and 3) data imports where the key field is indexed. Note that indexes should be used only when needed, as responses take longer to store the more indexes there are. This can lead to a performance reduction during interviewing. Also, the database will be unavailable for other processes the first time it is regenerated after the index property is set. Forsta Support therefore recommends against setting new indexes and regenerating a survey while respondents are answering the survey.
- **Variable Type -** there may be a time when your panel variables include a question with many answer alternatives, that you wish to simplify for the report. A question can therefore be:
  - **Normal -** an ordinary question object.

  - **Recoded variable -** turns this question into a recoded variable, which will not be displayed in the interview. You can predefine complex recoding rules in SQL or JScript. Note that the values for recoded variables must be updated "manually" (see Calculate Variables on page 113 for more information). Refer to the Authoring User Guide for further information on recoding.

- **Numeric –** check to specify that the field shall only accept numerical characters.
- **Total Digits –** specify the total number of digits the field can contain.
- **Decimal Places –** specify the maximum number of decimal places allowed.
- **Lower/Upper Limit –** specify an upper and/or a lower limit for the number.
- **Lower/Upper Limit Type –** specify the limit type; either = or <=/>= as appropriate.
- **Data Edit Access Required** – this is the editing access permission level that users must have to be able to edit the date for this question in the database column. Users with editing access permissions lower than this level will not be able to edit the data for this question. Go to the **Panel Utilities > Panel Overview page > Permissions** tab to allocate the appropriate permission levels to the users (see Access Permission Levels on page 33 for more information). The options here are:
  - **Low –** all users with normal access permission can edit the data in this column.
  - **Medium –** only users with access levels Medium or High can edit the data in this column.
  - **High –** only users with access level High can edit the data in this column.
- **Boolean –** applicable for Single questions. If selected, the question can have only two options, and the codes must be 0 and 1. If you set an existing question to Boolean and that question had more than two answer options, then all the options except the first two will be deleted.
- **Characteristic –** the group to which the data column is to be allocated (see Characteristic on page 24 for more information). The options are:
  - **Normal –** columns for which you expect the majority of operations will be reading of the data contained.
  - **Recoded –** columns for which you expect the majority of operations will be writing of data.
  - **Space Consuming –** columns for which you expect the data contained will usually take a lot of space in the database, for example free-text fields.
  - **Loop Support –** defines a column as “Job-specific” information. Some information in the database is related to the survey job rather than to the specific panelist. When a number of panelists are selected for the same job, then that job information could be repeated for every panelist. To avoid expanding the database with repeated information, job-specific information is held in a separate section of the database. That section is then referred to for each panelist it applies to.
- **Accept Leading Zeros –** check this box if you want the field in the expression builder to accept leading zeros.
- **Unique –** check if every field in the column is to be unique. Use this for passwords, login names etc.
- **Default Value** - type a value into this field to specify the value as default. The respondent will then be given this answer unless they enter a different answer.
- **Question Category** - define a category for the question. A Reportal user can then filter on the question categories when using hitlists in single view in Reportal. Refer to the Reportal User Guide for further details.
- **Deleted –** will be checked if the question has been deleted from the Panel Variables toolbox (see How to Delete an Object from the Tree on page 14 for more information). Uncheck to undelete the question (see How to Undelete an Object on page 14 for more information). Note that you can view deleted questions by right-clicking on the Panel Portal name in the tree and selecting **Show Deleted**. Deleted questions will then be shown “pale” until **Hide Deleted** is selected.

Note: Some questions are required in a database by default, and these questions will be added automatically when you create a new database. As the information contained in these questions is required, some of the properties for these questions are not accessible and cannot be changed.

4.1.4.2. Characteristic

To improve accessibility and reduce processing times, the database is divided into sections. The sections group the columns together depending on the type of processing expected to be most usual in the columns. For example, for some columns most of the processing will involve reading the data contained, while for other columns most of the processing will involve writing data to the column. Other columns are expected to use a lot more file space than others, as a “free text” character uses eight times more space than a Boolean character. Use the Characteristic property to specify which group the column will be allocated to.

When the database needs to process information, it will go first to the group containing the columns with the appropriate characteristic. For example, if a database process is to write some data to a column, then the system will look for that column first in the Recode group. If the system finds the column in that group then it will perform the process. If it does not find the column there, then it will look in the other groups. This procedure will save considerable processing time, as otherwise the system must look through the entire database each time it needs to conduct a process.

4.2. Database Generation

This menu command activates the database generation function. The Panel database is used to administrate the panelists. If changes are made to the database, then it must be re-generated for those changes to be incorporated.

This menu command only generates the database or regenerates it after changes have been made. To create or edit the database, go to **Panel Setup > Designer** (see Designer on page 12 for more information).

1. Go to the **Panel Setup > Database Generation** menu command.

   The page shown below is displayed.

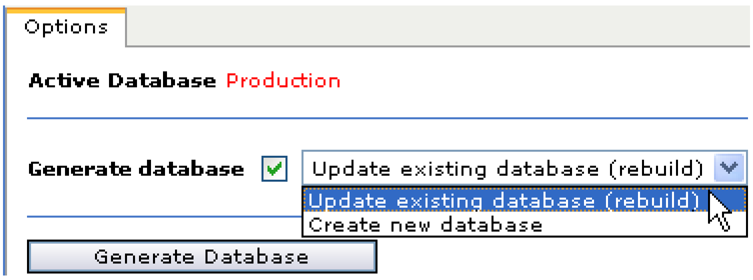


Figure 19 The Generate database Options tab

2. Select whether you wish to generate a new database or update the existing database (if the database has not been generated previously then the “Update existing database” option will not be available).

Note: If you select Update Existing Database, the database and the new data are checked before the update commences. In the event an error is found, then the process is stopped before any changes are made. If no errors are found then the new data will be added to the existing database – no existing data will be deleted.

Note: If a database already exists for the project and you select Create New Database, the old database will be overwritten and any data in the old database will be deleted.

3. Click **Generate Database**.

   The database is created/updated. A Task pane opens, containing a progress bar and a task status list. When the database has been generated, the text Task Completed will be displayed at the bottom of the task status list.

In the event you have deleted questions from the database during editing, see also section DatabaseCleanup.htm.

Note: Only the database is created; there is no web interview. Note also that in Professional Panels there is no Test database available.

4.3. Professional Panel Definition Export

You can export Professional Panel definitions (the project coding) using XML. This enables you to transfer panel definitions from one Forsta server to another. When you export a panel definition, the definition file is attached to an email, which is sent to the address specified in the Email Recipient field in the dialog box.

When a panel definition is exported, included with the definition are the sampling settings under the **Sample Management > Sampling Settings** menu (see Sampling Settings on page 202 for more information) and the panel settings under the **Panel Management > Panel Settings** menu (see The Panel Settings on page 119 for more information).

4.3.1. How to Export a Panel Definition

1. Go to the **Panel Setup > Professional Panel Definition Export** menu command.

   The ...Export overlay opens.

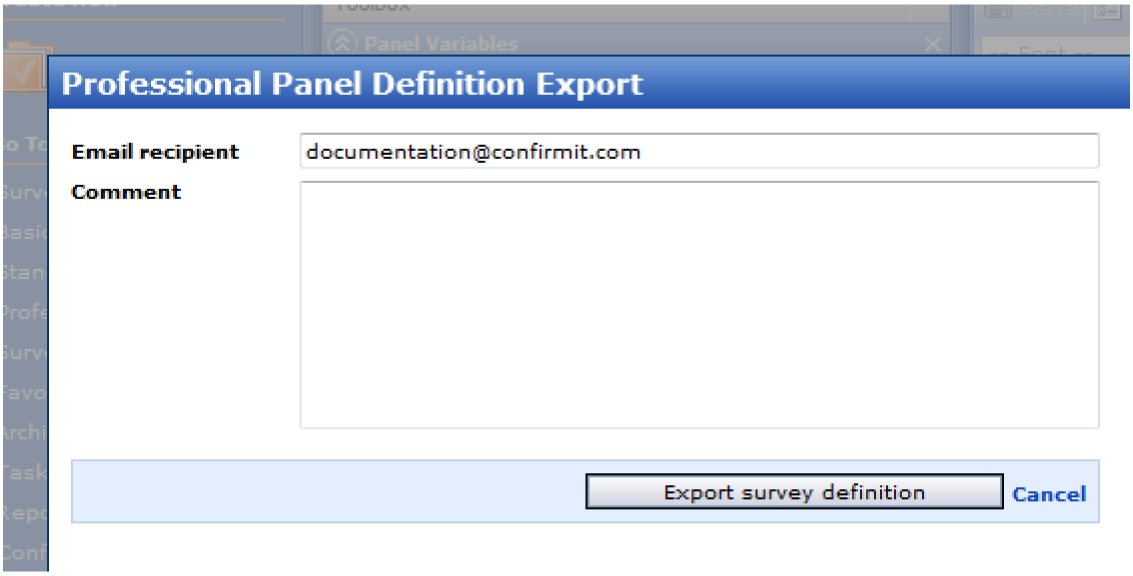


Figure 20 The Panel Definition Export overlay

2. Check that the Email recipient is correct, type any comments into the Comment field as appropriate, then click **OK**.

   The Task page is displayed, showing a progress bar, the task ID and the status. On completion, the progress bar is at 100% and an **OK** button appears.

3. Click the **OK** button to close the task page and return to the Professional Panel List page.

   An email is sent to the specified recipient containing the project definition XML file. This file can now be imported into another server.

4.3.2. How to Import a Panel Definition

To import a panel definition that has been exported from another server:

1. In the Professional Authoring Home page, go to the **Home > Import Survey Definition** menu command.

   The Survey Definition Import dialog opens.

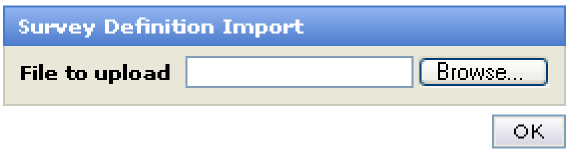


Figure 21 The Survey Definition Import dialog

2. Browse to the XML file you wish to import, then click **OK**

   A Task pane opens containing a progress bar and a task status list. When the project definition file has been imported, the text Task Completed will be displayed at the bottom of the task status list.

3. Click **OK** to close the Task pane.

   The panel will now be listed on the Professional Panel List, accessed by going to the **Home > Professional Panels** menu command. Once the panel is imported, you can import and attach a portal to it.

4.4. Designer Log

The system records actions executed on a project basis. The Designer Log provides an overview of all changes that have been made on the project since it was first created. The system records the exact time when changes are made, the user who makes the changes, and specifies details of the change.

This page is for information only - no changes can be made to the information.

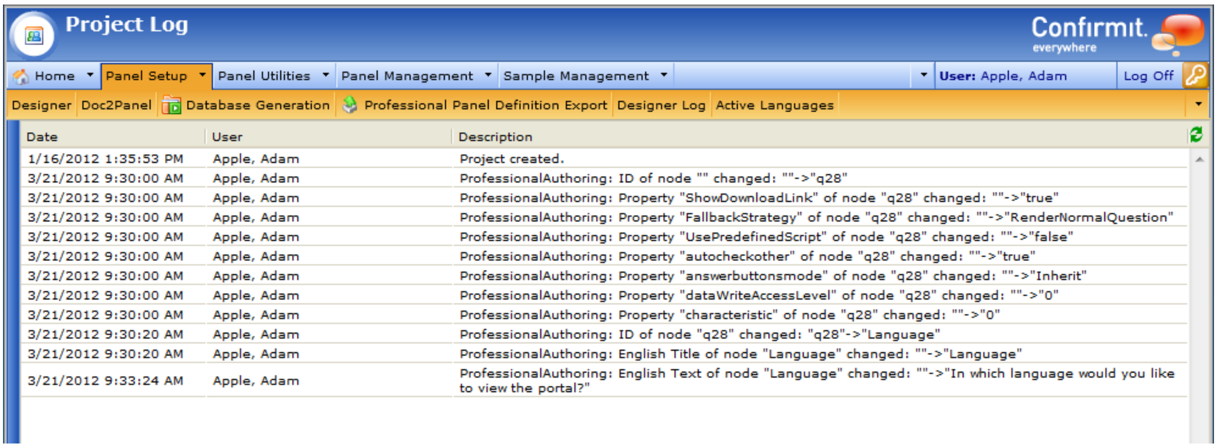


Figure 22 Example of the Designer Log page

4.5. Active Languages

This menu command opens the Active Languages page. This page lists the languages selected for the Portal on the General tab (see The General Tab on page 28 for more information).

In the General tab you can select as many languages as required for the Portal, but while you are working in Professional Panels, to keep the pages to a manageable size, a maximum of five languages can be displayed at one time. This limit applies anywhere where the languages are listed, such as in the database question details pages. Note that the maximum of five languages only refers to what you see whilst working in Forsta Plus; the panelists will see their selected language.

In the Active Languages page, check the boxes for the (up to five) languages you wish to show then click **Save**. To hide a language, click again in the box to remove the tick, and save.

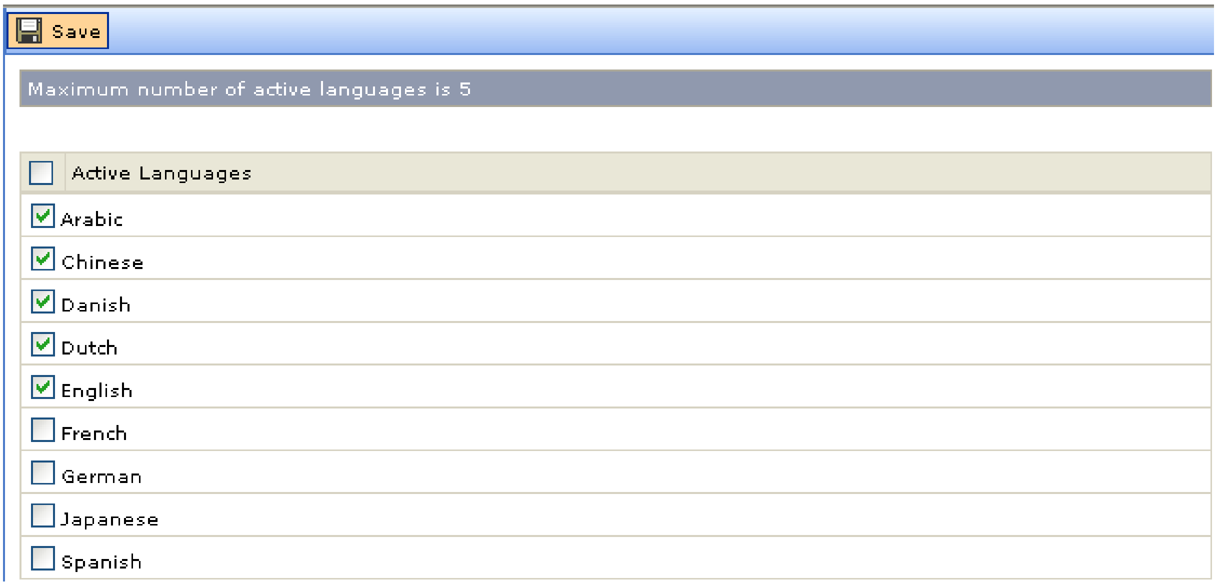


Figure 23 Example of the Active Languages pane

4.6. Legacy Jobs Import

If you are the Panel Administrator (you created the panel or have been given Administrator permission for it) and in addition have the SYSTEM_COMPANY_ADMINISTRATOR permission, then the **Panel Setup** menu will also include the **Legacy Jobs Import** item. This functionality is intended for new Professional Panel clients who have previously used a different panel-management product, and allows you to import legacy jobs into the panel from the other system. The imported legacy jobs can then be used for exclusion purposes.

Note: The legacy jobs imported must be in XML format, and the job number must match the survey history data existing in the panel.

Contact Forsta Support for further details.

5. The Panel Utilities Menu

The Panel Utilities menu contains additional utilities that will be useful to the designer while creating and/or editing the Panel Portals database.

Figure 24 The Panel Utilities menu

5.1. Overview

When you access a panel via its link in the Professional Panels list, you come first to the Panel Overview page. This page provides general information about the panel, presented on three tabs.

- The General tab.
- The Permissions tab.
- The Active Languages tab.

Note: In the event your company has licensed one or more extensions, then an additional tab will be available. For more information concerning extensions, refer to the Authoring User Guide.

5.1.1. The General Tab

This tab displays general information about the panel.

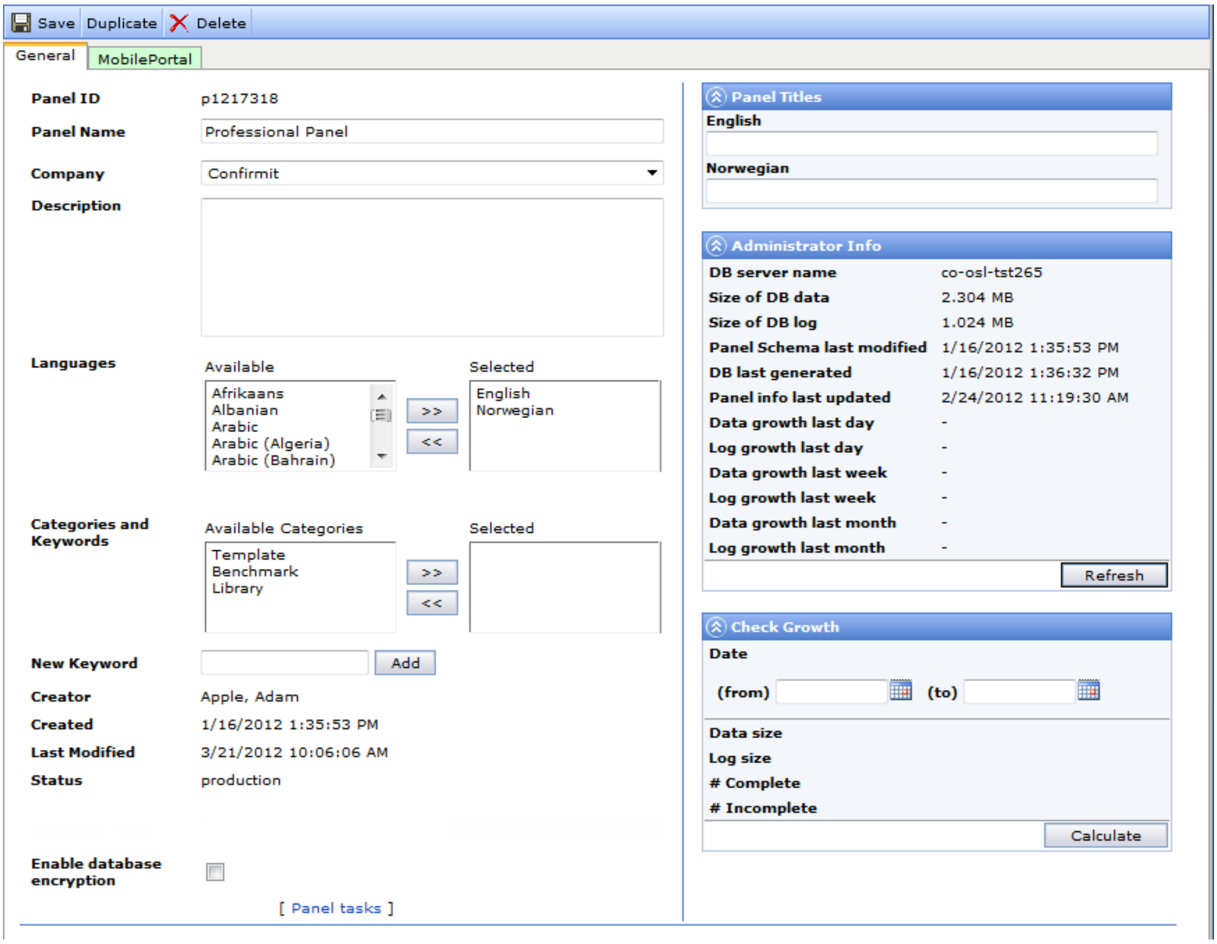


Figure 25 Example of the Panel Overview General tab for a panel

The information presented on this tab is as follows:

- **Panel ID –** the unique identification number for the panel. This is allocated automatically by Forsta Plus when the panel is first created and cannot be changed.
- **Panel Name –** the identifying name of the panel, given by the person who created it. You can change the name here.
- **Company –** the company registered as the "owner" of the panel. This can be changed here if you have the necessary permission. Click the down-arrow beside the field and select the required company name from the list.
- **Description –** a description of the panel, for future reference. Type in text here.
- **Languages –** the language(s) selected for the panel. To add a language, select it in the Available column and click the **>>** button to move it to the Selected column. The selected languages are then listed in the Active Languages page (see Active Languages on page 26 for more information).
- **Categories and Keywords –** the keywords registered for the project as listed in the Keywords column on the Professional Panels List page (see How to Access Professional Panels on page 3 for more information). To add a keyword, select it in the Available column and click the **>>** button to move it to the Selected column.
- **New Keyword –** use this field to add keywords to the Available list. Type the required word into the field and click **Add**.
- **Creator –** the name of the user who created the project. This cannot be changed.
- **Created –** the date and time when the project was created. This cannot be changed.
- **Last Modified** - the date and time when the project was last modified. This is updated automatically by Forsta Plus and cannot be changed manually.
- **Status –** the current status of the project. This is updated automatically as the project progresses.
- **Deployment –** the type of deployment selected.
- **Panel Portal URL -** the URL to the portal currently selected for this panel.
- **Enforce HTTPS… –** check this option to enforce HTTPS use in Advanced Reporting, accessing reports via the Enduser interface, for this project.
- **Email address... -** type in the email address to which you want error message emails to be sent in the event scripting errors are found in the interview. The default will be the email address of the current user (you).
- **Enable database encryption -** if your company has the required add-on, you can select this option to encrypt the production database. Refer to the Authoring User Guide for further details. Note that test databases are not encrypted, and it is not possible to change the encryption state of a previously launched database; once a database is launched, if you wish to change the encryption state you must create a new database.
- **Project Tasks button –** opens the Tasks management page (see The Project Tasks Page on page 29 for more information).
- **Recurring Tasks button** - if this panel has recurring rules that are active, then this button will appear. Click the button to open the Tasks Management page. In this page you can disable the recurring tasks or edit them as required (see How to Set Up Recurring Tasks on page 154 for more information).

5.1.1.1. The Project Tasks Page

The Tasks page allows you to check the status of any tasks requested for this panel.

Note: You can view all tasks by deleting the Project ID from the search criteria field and clicking Search.

To access this page: From the Panel Overview page > General tab, click the **Project tasks** button at the bottom of the page. The Tasks page opens at the Search tab. Forsta Plus users who have Administrator permission to a project will be able to see and search for all batch tasks that have been set up for this panel.

You can also access this page by going to the **Quick Access pane > Tasks** menu command. This will route list all tasks, but you can view only the tasks for one particular project by typing the project ID into the appropriate search field (see How to Change the Execution Settings on page 159 for more information).

The page comprises six tabs:

- **Scheduled tab**- lists all the tasks that are scheduled to run.
- **Executing tab** - lists the tasks that are currently executing.
- **Completed tab** - lists all the tasks that have already run and are completed.
- **Aborted tab** - lists all the tasks that have already run but which have aborted for some reason.
- **Recurring tab** - lists any tasks that are recurring.
- **Search tab** - lists all the tasks, enabling you to conduct searches more easily.

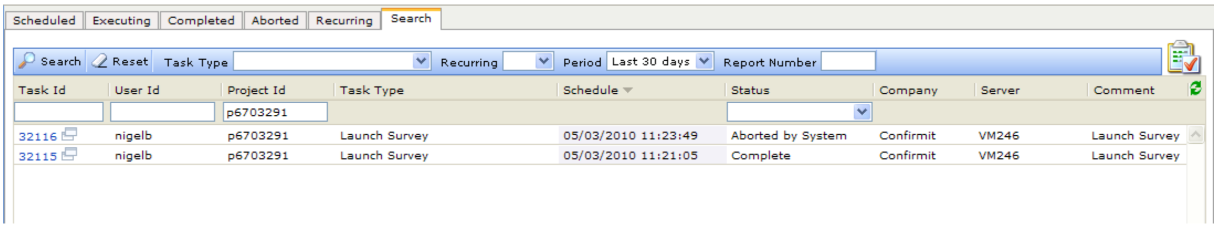


Figure 26 Example of the Task page

The In the event the task list is extensive, you can search through the list using a number of criteria:

- **Task Type** - if you know the type of task, select from the drop-down list.
- **Company** - if you know which company created the task, select it from the drop-down list.
- **Server** - the server the task is/was run on. Select from the drop-down list.
- **Recurring** - If you know whether or not the task is recurring, select as appropriate here.
- **Period** - if you know when the task was run, select the period from the drop-down list.
- **Report Number** - if you know the number of the report the task was associated with, type it in here.
- **Task ID –** the ID number given to the batch job by the system. Click on the header to sort the list.
- **User ID –** the login ID for the user initiating the task. Click on the header to sort the list.
- **Project ID –** the system-generated project number. Click on the header to sort the list.
- **Task type –** the type of task to be performed. Click on the header to sort the list.
- **Schedule –** the schedule date (the date the task was initiated). Click on the header to sort the list.
- **Status –** select a status from the drop-down list. Click on the header to sort the list. For Completed and Aborted tasks, only the tasks run during the past 7 days will be shown. Completed and Aborted tasks that are older than 7 days are deleted.
- **Company** - the registered company of the user who initiated the task.
- **Server** - the server on which the task is/was run.

Click on the **Task ID** number to go to the task details window. Here is displayed information about the particular task, and you can disable the task, set up or change the recurrence pattern (see How to Set Up Recurring Tasks on page 154 for more information), check the details etc. The details presented differ for the different task types. The figure below shows an example of the dialog for a sampling task.

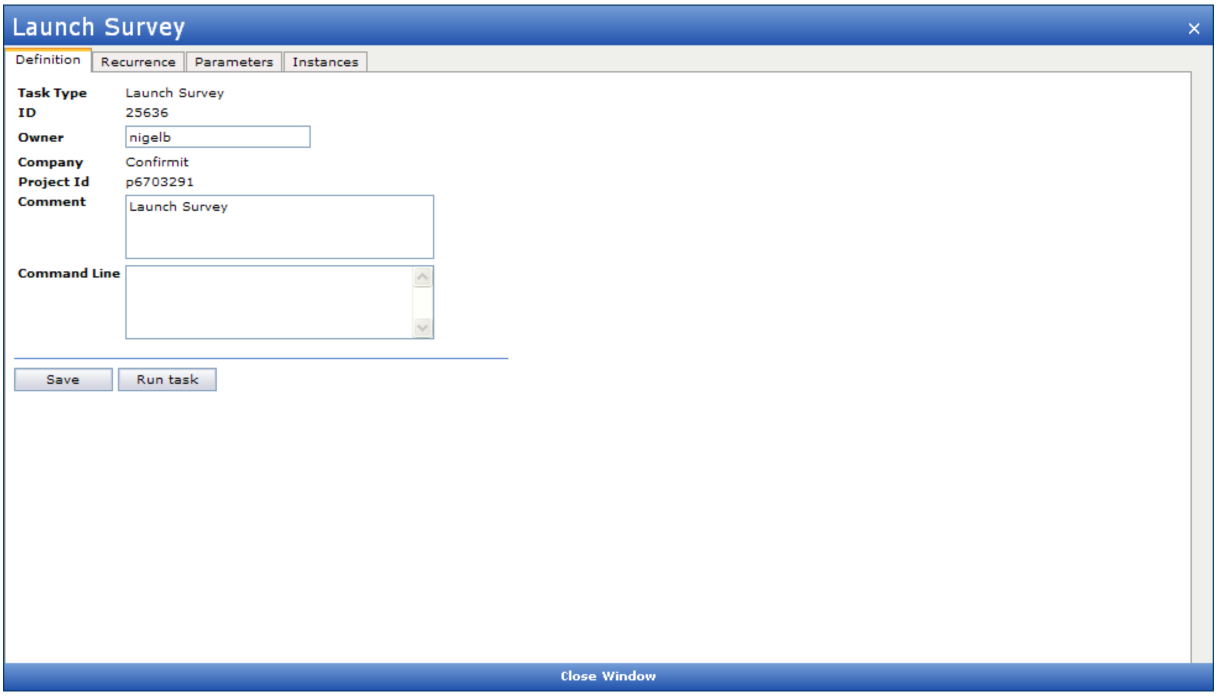


Figure 27 Example of a Task Details window

- Click **Close Window** to return to the Tasks page.

Note: To avoid unnecessary strain on the server if there is an error in the file, Forsta Plus sets a limit on the time a task can run before it is aborted. However, this may also result in heavy tasks (for example based on long questionnaires) being stopped before they are completed. In the event this becomes a problem, ask your Forsta administrator to adjust the time limitation.

ASP only - Contact Forsta Professional Services for assistance: support@confirmit.com

5.2. Permissions

The user who creates the panel is the panel administrator and owner, and a panel is initially invisible to all other Forsta Plus users. You can give access permission to other users via this page. All Forsta Plus users in your organization will be listed in the page, and you as the panel administrator may set up other Forsta Plus accounts with permissions to view the new panel.

ASP only: Personnel at Forsta may be granted access for support purposes.

Initially, only users and groups within your organization are listed on the page. To add other users, provide Forsta with those users' correct user keys.

To open the Permissions page, go to the **Panel Utilities > Permissions** menu item.

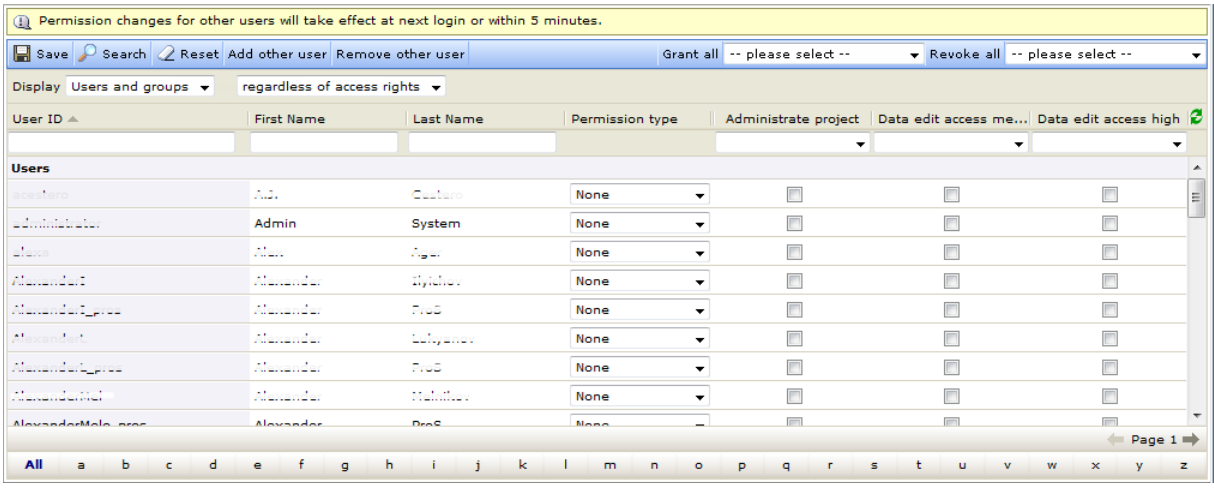


Figure 28 Example of the Permissions tab

The columns and buttons are as follows:

- **Search -** add search criteria to the column header fields and click Search to display only those users who satisfy the criteria.
- **Reset -** removes all search criteria and re-displays the complete list.
- **Add other user –** click to open a dialog that allows you to add users to the list.
- **Remove other user -** click to open a dialog that allows you to remove users that have previously been added.
- **Display -** you can select from the drop-downs to display just users, groups or other users, and/or user with permissions set.
- **Grant all -** select a permission from the drop-down beside this button and click the button to give that permission to all the currently listed users. Note that if you do not wish to give the selected permission to all users in your company then you must first conduct a search such that only the appropriate users are listed on the page.
- **Revoke all -** select a permission from the drop-down beside this button and click the button to remove that permission from all the currently listed users. Note that if you do not wish to remove the selected permission from all users in your company then you must first conduct a search such that only the appropriate users are listed on the page.
- **User ID** - the user id of the user (if entered in User Settings) is listed in this column.
- **Last Name / First Name** - the registered name of the user. This can be changed by the user in the **Home > User > Settings** page.
- **Permission type -** click the down-arrow beside a user's field to open a drop-down list of the permissions, then select the appropriate permission for that user. The options are:
  - o **None -** the user does not have access to the project.
  - o **Read** - the user has only Read permission, i.e. he/she can view the questionnaire and associated reports but is not allowed to add new or delete existing elements in them.
  - o **Write** - the user has Write permission, i.e. he/she is allowed to add questions to the questionnaire and reports.
  - o **Delete** - the user has Delete permission, i.e. he/she is allowed to work on the questionnaire and reports, and is allowed to delete objects in them.
- **Administrate project** - The user is the administrator and owner of the project. He/she may alter the questionnaire, set the project live, check response status, etc., as well as delete the entire project This is usually the person who initiates the project.

On completion, click **Save** to save any changes.

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

5.2.1. How to Add Users to the Permissions List

Typically, an external user will send you his or her user key by email. Paste this key into Forsta Plus as follows:

1. Click the **Add other users** button above the list.

   The Add other users overlay opens.

2. Paste the new user's key into the overlay and click **Add**.

Note: Ensure there is no space after the last character in the user key.

The overlay closes and you are returned to the Permissions list. The new user is added to the list under Other Users.

You must now allocate the appropriate Permission levels to the new user.

5.2.2. How to Remove Users from the Permissions List

To remove a user from the Other Users list:

1. Click the **Remove other user** button above the list.

   The Remove Other Users overlay opens, listing the users in the Other Users list.

2. Select the user or users you wish to remove from the list and click **Delete**.

Note: You can only remove users from the Other Users list. Users in the "Users in own company" list can only be added and removed by the company system administrator.

5.2.3. Access Permission Levels

The panelist data is held in columns in the database; one column for each "question" (see Designer on page 12 for more information). The data in the various columns can be viewed by any user, but can only be changed by a user if that user has the appropriate permission level for that column. Each individual column can have one of three access levels; Low, Medium or High, the level for the column being defined by the database designer in the Question Properties pane (see Question Properties on page 22 for more information). Each user is given access permission to one of these same levels here in the Permissions tab.

- **Low –** the default access level. None of the Data Edit Access check-boxes are selected. The user can read all the data columns, and change data in columns that have Low write access. The user cannot change data in columns having Data Edit Access Medium or High.
- **Medium –** the Data Edit Access Medium check-box is selected. The user can read all the data columns, and change data in columns that have Low or Medium Data Edit Access but cannot change data in columns having the Data Edit Access High setting.
- **High –** the Data Edit Access Medium and High check-boxes are selected. The user can read or change all the data columns.

5.3. Linked Surveys

Click this menu item to open a drop-down list as shown below.

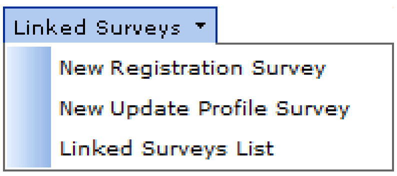


Figure 29 The Linked Projects drop-down list

The options are:

- **New Registration Survey -** click to create a new survey for panelists' initial registration to the Professional Panel. This functionality is also available via a button on the Linked Projects list. Refer to the Authoring User Guide for more information on creating surveys.
- **New Update Profile Survey -** click to create a new survey to allow existing panelists to update their profile. This functionality is also available via a button on the Linked Projects list. Refer to the Authoring User Guide for more information on creating surveys.
- **Linked Surveys List -** opens a list of those surveys that have been linked to the panel. The list shows registration surveys, profile update surveys, polls and surveys that have been sampled to. Note that keywords are available for registration and update surveys, and can be used for filtering.This list can be filtered on the different categories: Sample surveys (regular surveys that you have uploaded sample to from the Professional Panel), Registration surveys and Profile Update surveys (the categories mentioned above) and Polls. Click on the survey name to open the survey in Authoring.

Note: Old registration and update surveys must be given these keywords to appear in the filtering (but they will appear in the list under sample surveys).

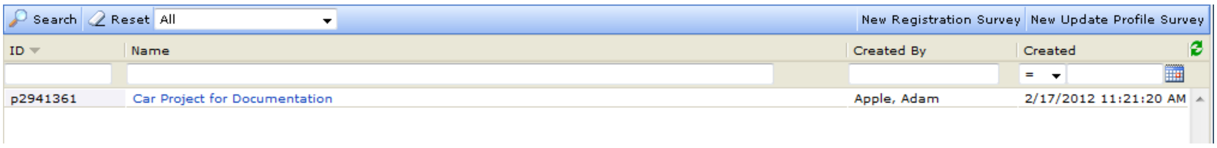


Figure 30 Example of the Linked Projects list

Two buttons corresponding to the **New ... Survey** menu items are available in the upper-right corner of the list, to enable you to create new registration and update surveys. This greatly simplifies setting up these types of surveys from the panel, since the functionality will automatically set the correct category and link the survey to the panel. For the Registration survey, it will also automatically add the email and password questions that you need to create the panelist.

When working with a survey that is linked to a Professional Panel, the Professional Panel will automatically open in the Secondary Project toolbox. From here you can drag-and-drop variables from the Professional Panel into the survey. The variables dragged in will automatically be set as Visible panel variables. Also, if you have the Professional Panel add-on, two new Categories are introduced on the Project Overview page, allowing you to categorize surveys that are Registration Projects and Update Profile Projects. Refer to the Authoring User Guide for further information.

Surveys linked to a panel will have a link on the Survey Overview page, enabling you to go directly to that panel from the survey. In addition, the Hide Survey from Panelist check box is available. Normally, all surveys a panelist is sampled to (matching the status filter) are listed in the survey list in a panel portal. Check this box to prevent the survey being listed

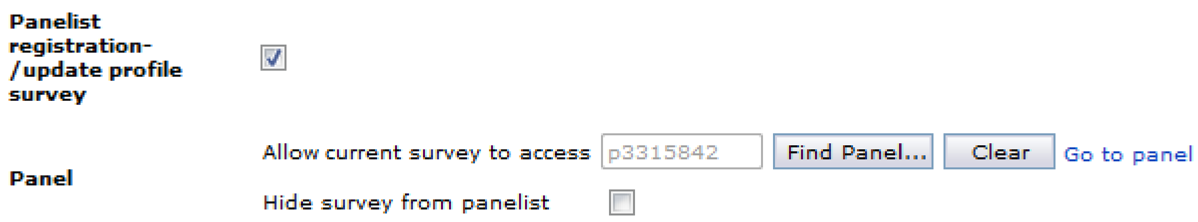


Figure 31 Example of the Professional Panel buttons and link on a linked survey's Overview page

5.3.1. Using Visible and Hidden Panel Variables

In Authoring, two Panel-related variable types are available in the question property sheets:

- Panel variable (hidden).
- Panel variable (visible).

Both can be used in surveys to which you have uploaded sample from a Basic Panel, and in surveys that are linked to a Professional Panel (through the "Professional Panel" setting on the Project Overview page).

Panel variable (hidden) can only be used to pull values from the corresponding field (with the same variable name/type) in the panel database - you cannot use this to push data back to the panel. This is done automatically at the point in the survey where the variable is placed. Hidden panel variables will not push any data back to the panel, so in the event you need to set different values for these hidden fields, you must write a script to submit those values to the panel database.

Panel variable (visible) will pull the value that is stored in the panel database (if there is a value there), and the question will then be displayed to the respondent with this value. The respondent can modify the value and submit a different response as required. For surveys linked to a Professional Panel, if the panelist exists in the panel database (profile update or regular surveys) then the new value will automatically be submitted to the panel database when the respondent moves to the next page. For Panelist Registration surveys, this means that the panelist must be added to the panel (using the CreatePanelist function call), before the visible panel variables will be able to push data to the panel. For Basic Panels, no data will be submitted back to the panel database.

When working with a project that is linked to a Professional panel, the Panel will automatically open in the Secondary Project toolbox and you can drag-and-drop variables from the Panel to the survey. The variables dragged into the survey will automatically be set as Visible panel variables.

5.4. Panel Portals

In Forsta Plus you can build your own library of panelist interfaces (Panel Portals), through which your panelists (and potential panelists) can read about your panels and register as new panelists. Those who have already become panelists (members) can log into the Panel Portal to answer new or previously-started surveys, view their survey list, update their profile, view their points, etc. All these actions are conducted via the **Panel Portals** menu.

A panel functions in the same way as a normal survey. Typically, a panel consists of mapping and profile questions such as demographic questions, work-related and household questions. The panelists register themselves in your Panel, or you can import people directly into your Panel if you already have their information. Based on their information inside the Panel, you can then recruit relevant respondents to specific surveys. A Panel Portal is the interface (homepage) through which your panelists log in to participate in surveys, check their point status, change their profile, etc.

Panel Portals can only be used together with Forsta Plus Panels.

5.4.1. Accessing Panel Portals

1. On the Professional Panel List page, click on the appropriate **Panel ID** to open the Panel you wish to work with.
2. Go to the **Panel Utilities > Panel Portals** menu command.

   The Panel Portal List page opens. This page lists all the portals that you have access to. The current portal (if any) is shown in bold.
3. To open a Panel Portal in the Designer page, click on the Portal Name, or move the mouse pointer onto the Portal name to display a down-arrow button beside the name, click the button to display a drop-down menu and select **Designer**.

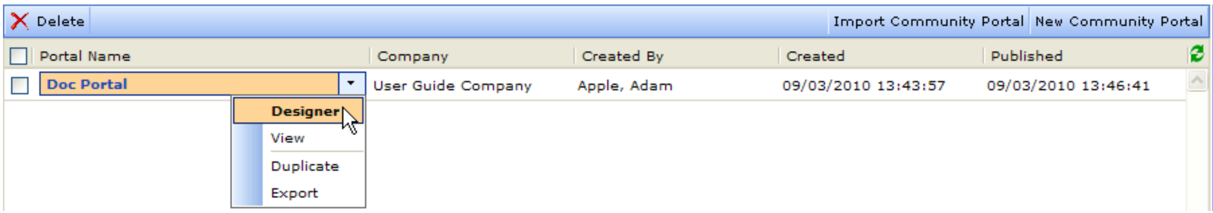


Figure 32 Accessing a Panel Portal for editing

The menu options are:

- **Designer –** opens the Panel Portal Designer page. This menu command has the same effect as clicking directly on the Portal name.

- **View** - opens the panel in viewing mode, as the panelist will see it, in a new window. Note that the panel must be published before **View** becomes available (see How to Publish a Panel Portal on page 64 for more information).
- **Duplicate –** makes a copy of the selected Portal. You can then re-name and edit the copy to make variations of the original.
- **Export –** allows you to export a Panel Portal to another Forsta server.

5.4.2. How to Add a Portal to your Panel

A Panel Portal can only be activated on a Forsta Plus Panel. You can do this in two ways:

- **Create** a new Panel Portal (see How to Create a New Portal for a Panel on page 36 for more information).
- **Import** an existing Panel Portal template to your panel (this is the most common approach)(see How to Import a Panel Portal on page 37 for more information).

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

5.4.2.1. How to Create a New Portal for a Panel

1. Go to the **Panel Utilities > Panel Portals** menu command.

   The Panel Portal List page opens.

2. Click the **New Panel Portal** button located towards the upper-right corner of the page.

   The New Template wizard opens at the Properties overlay.

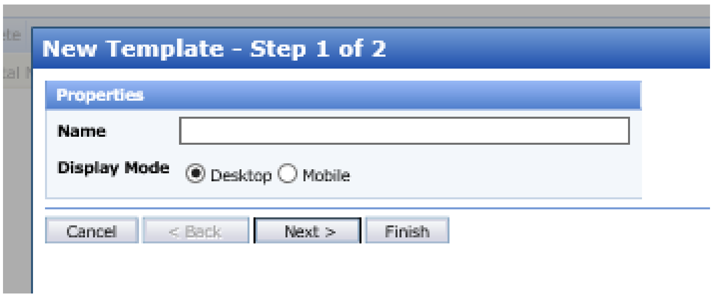


Figure 33 The New Template wizard Properties overlay

3. Type a name for the new portal into the Name field.
4. Select whether you wish the portal to be for desktop or mobile device rendering.
5. Click **Next**. Note that if you choose **Finish** here then an empty Portal Designer page opens and you must then create the portal "manually".

   On **Next**, the wizard moves to step 2 in the process and the template selection page opens. This lists the templates available to you for the selected type of rendering.

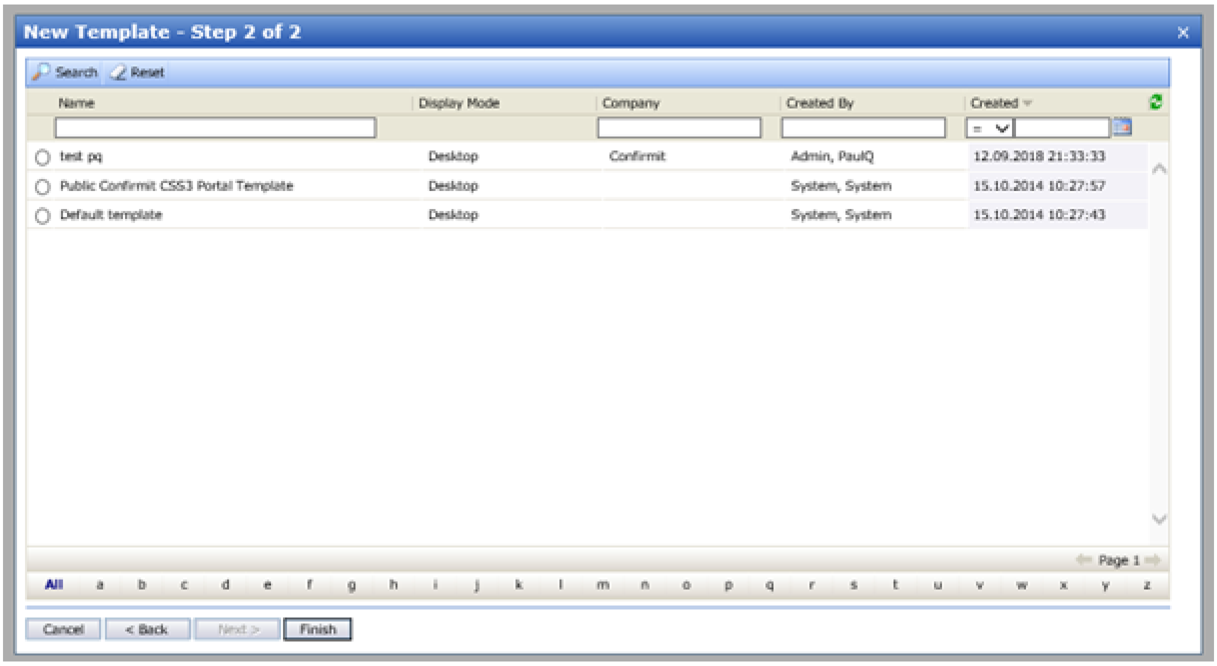


Figure 34 The New Template wizard step 2 - selecting the template to use

6. Select the template you wish to use from the list and click **Finish**.

   The Portal Designer page opens with the new portal as defined by the selected template. Use this page and the toolbox provided to design and edit the portal as required.

5.4.2.2. How to Import a Panel Portal

You can also import Panel Portals created on other Forsta installations (see How to Export a Panel Portal on page 66 for more information).

Note: You must first have a Panel into which the Portal can be imported.

1. Go to the **Panel Utilities > Panel Portals** menu command.

   The Panel Portal List page opens.

2. Click the **Import Panel Portal** button located towards the upper-right corner of the page.

   The File to Upload selection dialog box opens.

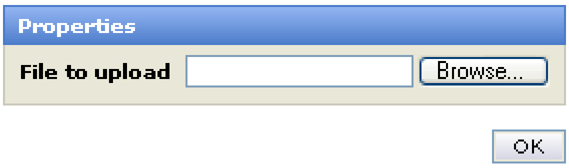


Figure 35 The File to Upload selection dialog box

3. Click **Browse** to open a standard Windows file selection dialog.
4. Browse to and select the portal file you wish to import, then click **Open**.

   The portal is imported to this Panel.

5.4.2.3. How to Set a Portal as Default

In the event you have more than one portal available, you can set one of them to be default. To do this:

1. Go to the **Panel Utilities > Panel Portals** menu command, and from the Panel Portal List select the portal you wish to make default.

2. In the PanelPortal toolbox, right-click on the portal and select **Set as Default Portal**.

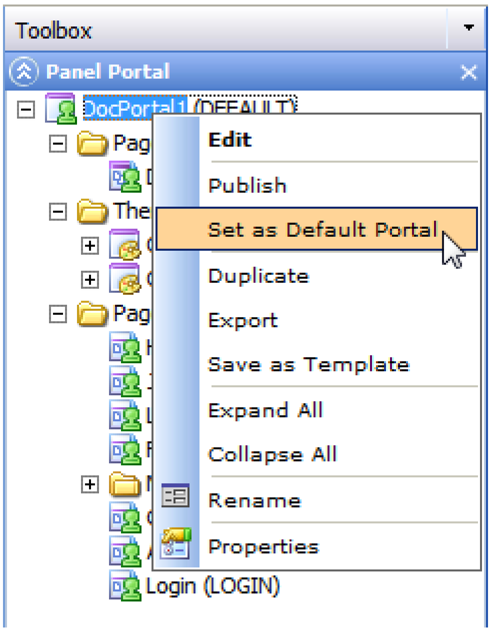


Figure 36 Setting a portal as Default

The text (DEFAULT) is displayed after the portal name in the toolbox, and the portal name is displayed in bold text in the Panel Portal List.

5.4.2.4. How to make the Portal Dynamic

You can control which portal is displayed when a panelist logs in such that for example the portal layout depend on the country of origin specified in the user's details. The variable that is used to specify which portal is to be displayed is set in the default portal. To do this:

1. Decide which variable in the panel is to control the portal used, or create the variable as necessary.

   This variable must include all the possible options for which you wish to provide different portals for. This example uses the Country variable, so will display a portal depending on the country selected by the panelist. The panel question should ask for example "In which country do you live?"

2. Go to the **Panel Utilities > Panel Portals** menu command to open the Panel Portal List window, and select the default portal.
3. In the Panel Portal toolbox, right-click on the portal name (the top item in the toolbox) and select **Properties** from the menu or double-click on the portal name, to open the Properties page for the portal.
4. Set the Portal Code Variable property to the variable you wish to use as the controller (in this case **country**).

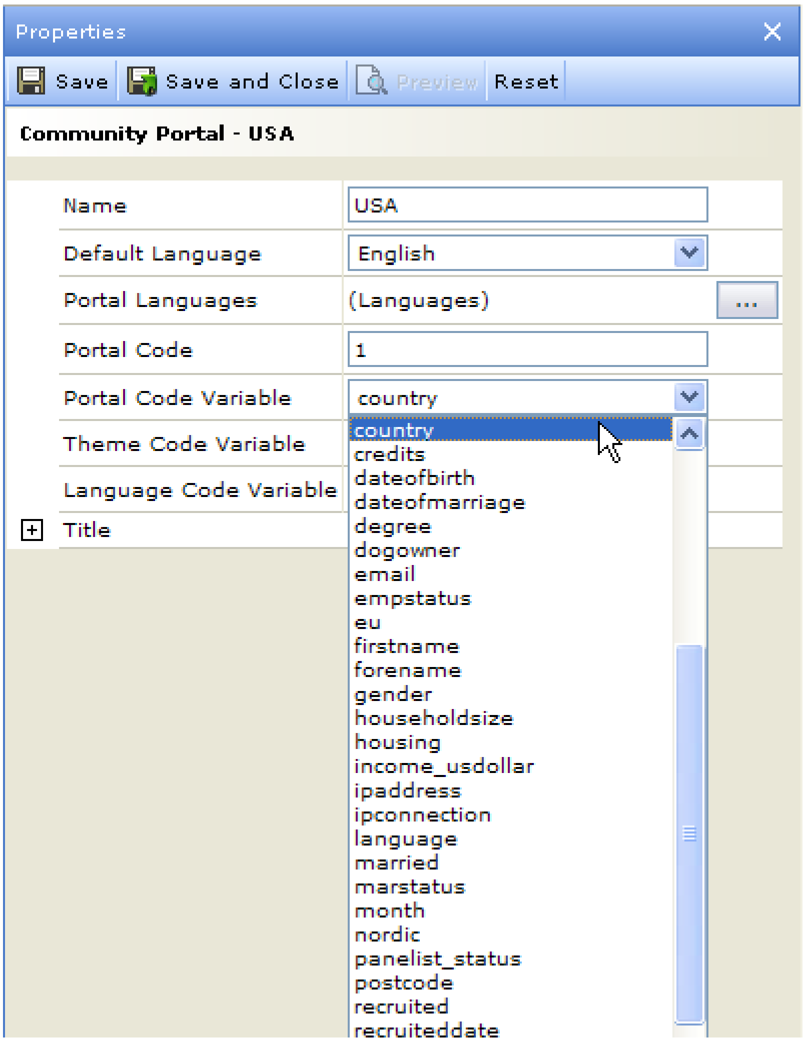


Figure 37 Setting the Portal Code Variable property

5. Set the Portal Code property to the code for the "default" country and save the changes.
6. Go to the Properties pages for the other portals that are to be made available, and set the Portal Code property to the code of the appropriate answer. I.e. If a particular portal is to be presented when the panelist's country is France, then set the code for the France answer into the Portal Code field for that portal. Note that for the "secondary" portals, the Portal Code Variable will already be set to that selected above for the default portal.
7. Save the changes.

   Once the panelist has completed the panel questionnaire and provided an answer to the Country question, when the panelist later logs in, he/she will automatically be presented with the portal specified by the variable.

Note: Once the Portal Code has been set for a portal, then it can be displayed by adding the querystring parameter "pc" to the portal url. for example, add ...&pc=1 to the url to use the portal with the code 1.

5.4.2.5. How to Add Meta Tags to a Portal

You can add meta tags to the HTML code of the Panel Portal pages, enabling you to add information such as Author, Description, Keywords etc. to the page. Note that this information will not be visible on the survey page. To add meta tags:

1. In Forsta Plus, open the portal you wish to work with.
2. Double-click the top-most node (with the name of the portal) or right-click it and select **Edit**.

   The Meta Tags list page opens.

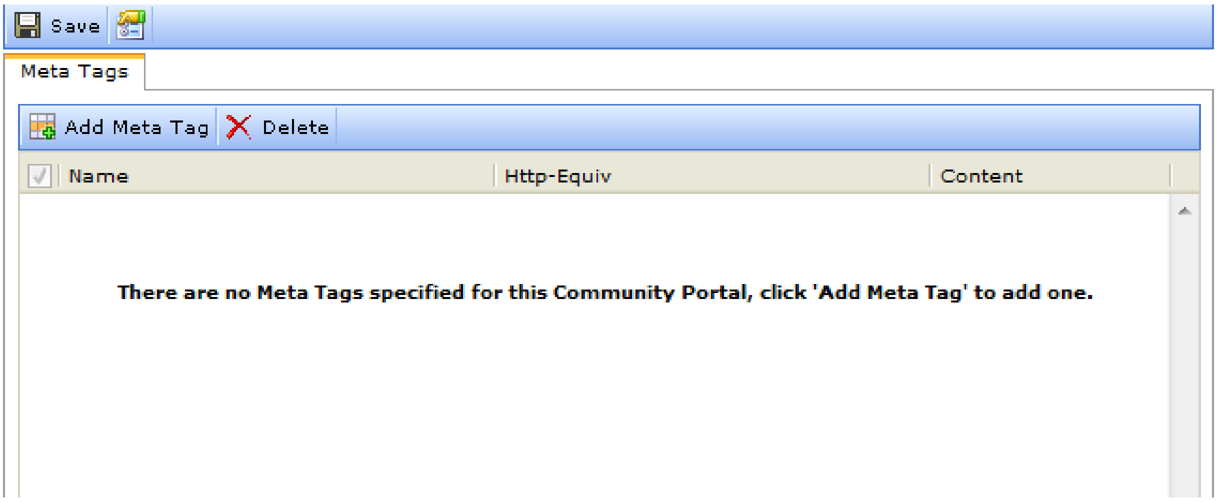


Figure 38 The Meta Tags list

3. Click the **Add Meta Tag** button.

   Data fields appear.

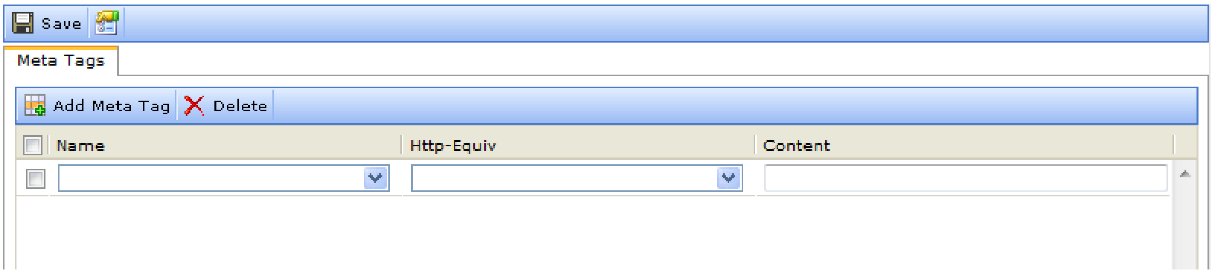


Figure 39 Adding a Meta Tag to the list

4. Click the down-arrow beside the Name field to open a list of standard tags and select a tag from the list, or type another tag name into the field.
5. Add the content of the tag into the Content field.

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

6. Click **Save** to save the changes.
7. Repeat the procedure as necessary to add more meta tags.
8. On completion, publish the portal and verify that the meta tags are added correctly to the page.

5.4.3. Panel Portal Languages

The Panel Portal pages and texts can be made available to the respondents in any language and any number of languages. You can also make the portal language dynamic, so the portal will automatically adopt the language specified in the user details.

5.4.3.1. How to Add a Language to the Portal

1. In the Panel Portal toolbox, right-click on the Portal name (the top item in the toolbox) and select **Properties** from the menu or double-click on the Portal name.

   The Properties page for the portal opens.

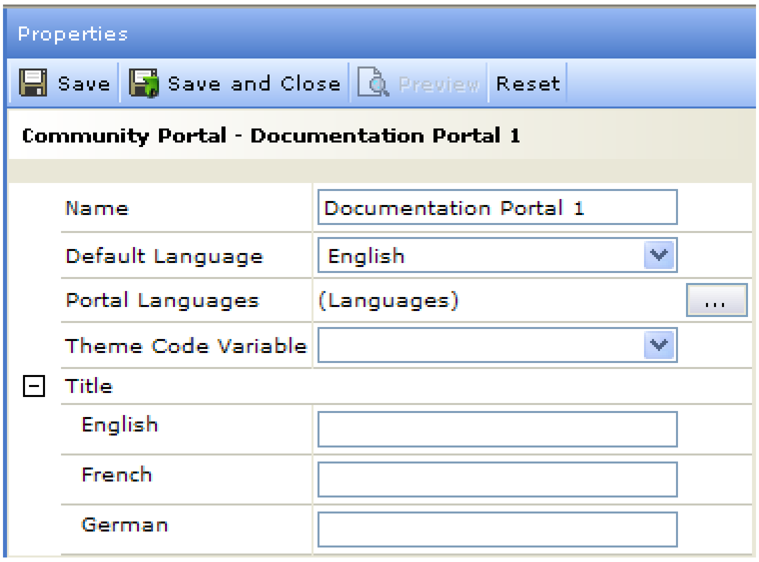


Figure 40 Example of the Properties page for a Portal

2. Click the **...** button beside the Portal Languages property.

   The Portal Languages window opens with the currently selected languages listed in the Selected Items column.

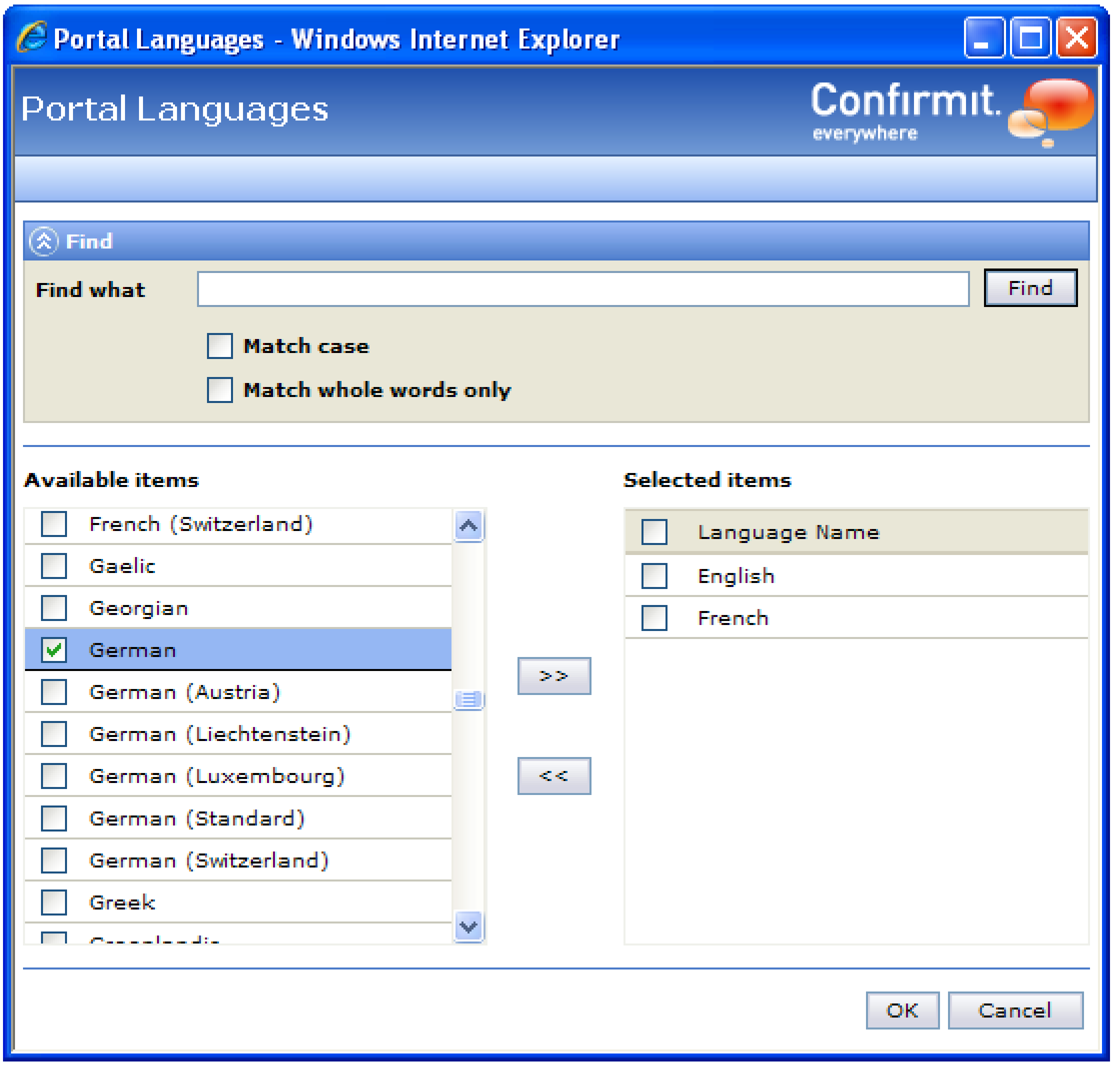


Figure 41 The Portal Languages window

3. In the Available Items column, scroll to the language you wish to add to the portal, and click on it to select it. You can select as many languages as you require.
4. Click the **>>** button to move the selected language(s) to the Selected Items column.
5. Select a language in the Selected Items column and click the **<<** button to remove that language.
6. On completion, click **OK**.

   The window closes and the selected languages are added to the Portal.

Note: A search facility is available in the upper part of the window. If this is not visible, click the chevron button beside Find to open it.

Text fields for the selected languages will now be available in the Portal and page Properties pages. You must now fill in the text fields for the Portal and the various pages for the languages you have selected (see Page Properties on page 53 for more information).

5.4.3.2. How to make the Portal Language Dynamic

You can make the portal language dynamic such that the portal will use the language specified in the user's details. To do this:

1. In the panel, create a language variable using the language codes (refer to Appendix B of the Authoring User Guide for details) as the codes for the options.

   This variable will need to include as answer options all the possible languages that you wish to provide to the panelists. It should ask for example, "In which language would you like to view the portal?"

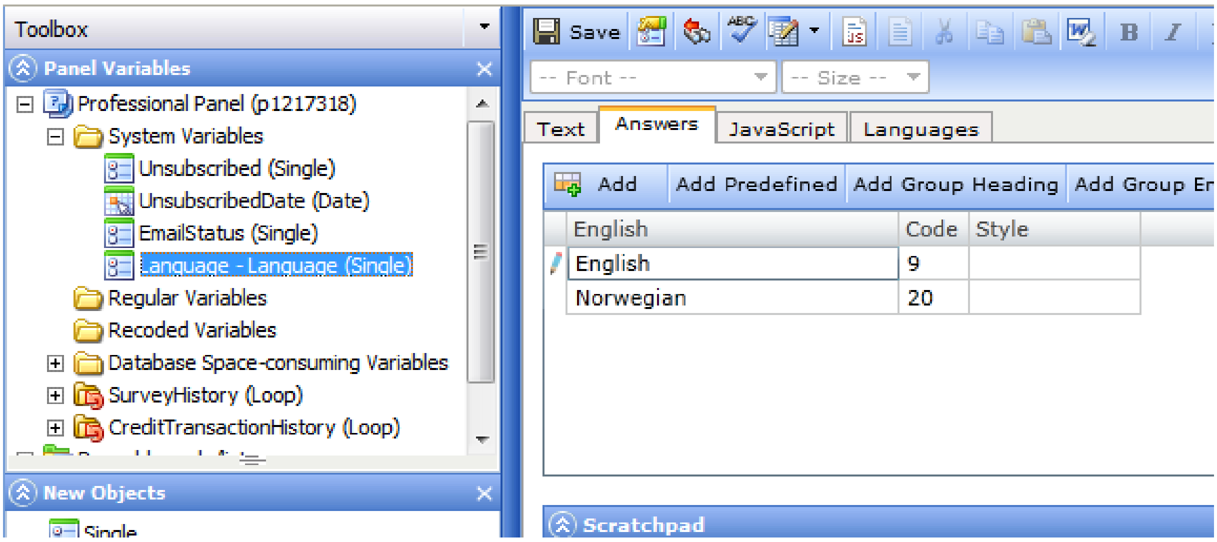


Figure 42 Example of the language variable

2. Go to the **Panel Utilities > Panel Portals** menu command to open the Panel Portal List window, and select the portal you wish to work with.
3. In the Panel Portal toolbox, right-click on the Portal name (the top item in the toolbox) and select **Properties** from the menu or double-click on the Portal name, to open the Properties page for the portal.
4. Set the portal's Language Code Variable property to the variable you created in point 1 of this procedure, as shown below.

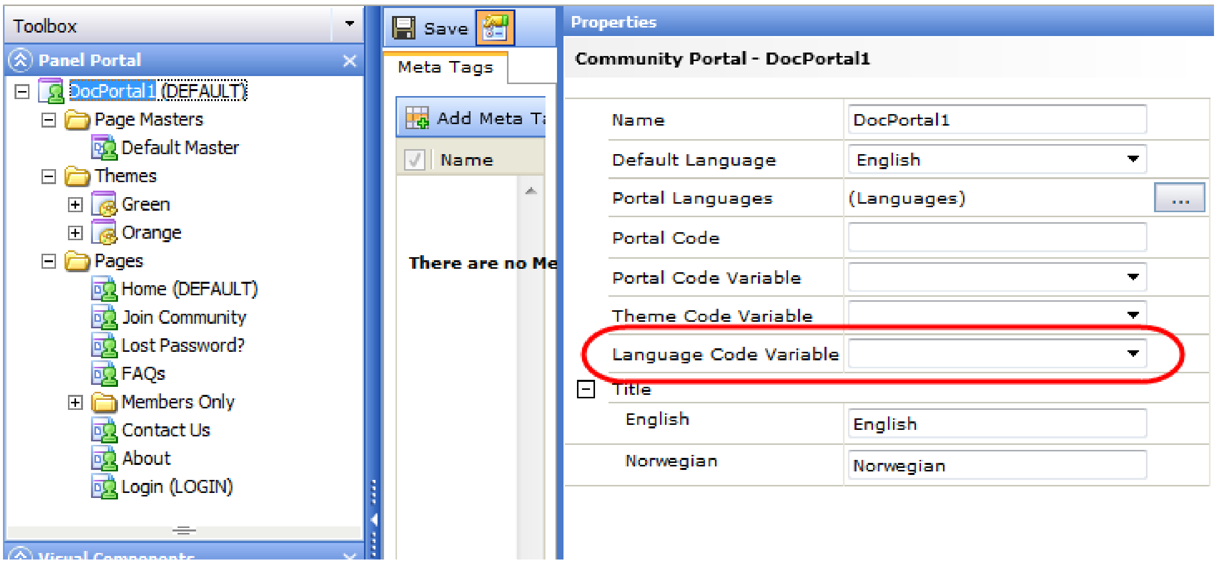


Figure 43 Setting the Language Code Variable property

5. Save the changes.

   Once the panelist has completed the panel questionnaire and provided an answer to the language variable, when the panelist later logs in, he/she will automatically be presented with the language specified in the variable.

Note: The dynamic portal language functionality will not work if the Language Selector component is included in the panel. If the Language Selector component has been used then you will need to go through the panel and remove all instances of the component from the page master and all pages.

5.4.4. The Panel Portal Designer

The Panel Portal Designer is where you create and make changes to your portal pages. The toolbox contains the Page Masters (see The Page Masters Folder on page 45 for more information), Themes (see The Themes Folder on page 46 for more information), and Pages (see The Pages Folder on page 51 for more information). The Visual Components toolbox contains the elements that you can use on a page (see Visual Components on page 55 for more information).

In the figure below, the Panel Portal toolbox contains a Page Master, Themes and a number of Pages. In addition there are more pages inside the Members Only folder (see Folders and Structure on page 54 for more information).

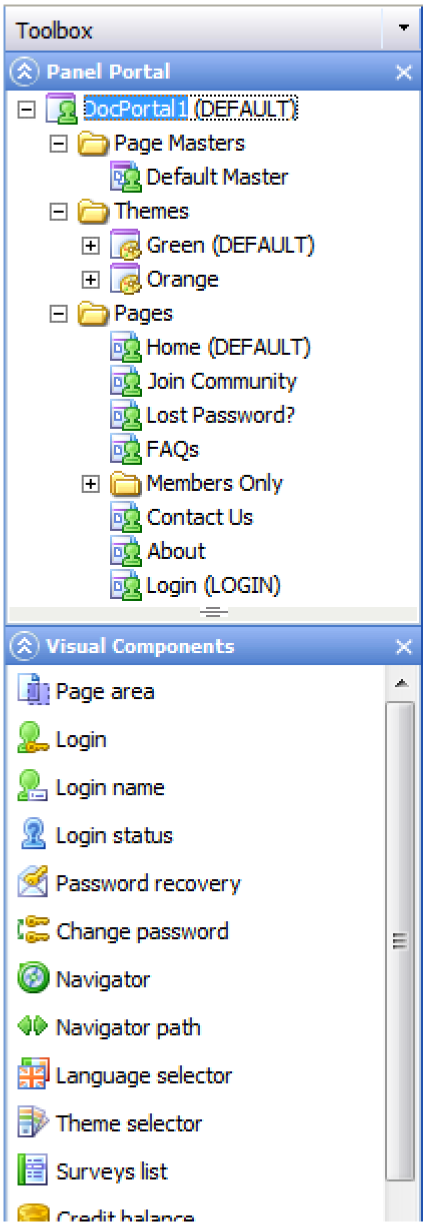


Figure 44 The Portal Designer toolboxes

The portal has a right-click menu. The options in this menu allow you to publish the portal (see How to Publish a Panel Portal on page 64 for more information), set the portal as default (see How to Set a Portal as Default on page 37 for more information), export the portal etc.

5.4.4.1. The Page Masters Folder

A Page Master is a template that provides an overall look-and-feel to the pages in the Panel Portal. You can create as many Page Masters as you need for a Portal. The first Page Master in the list will be used as the default, and will be applied to all pages in the Portal unless other Page Masters are specified for particular pages. A portal page will always adopt the look-and-feel of the Page Master specified.

5.4.4.1.1. How to Create a Page Master

To create a new Page Master, right-click on the Page Masters folder name text beside the folder icon to open the drop-down menu, and choose **Insert Page Master (Inside)**. A blank Page Master is added to the portal. If you want to base a new Page Master on an existing one, then right-click on the Page Master you wish to copy, and choose **Duplicate**.

5.4.4.1.2. The Page Master Properties

The Page Master has a Properties page where you can edit the page master name, set the document type etc. To open the Properties page:

1. In the Panel Portal toolbox, expand the **Page Masters** folder, right-click on the page master and select **Properties** from the drop-down menu.

   The Properties page opens.

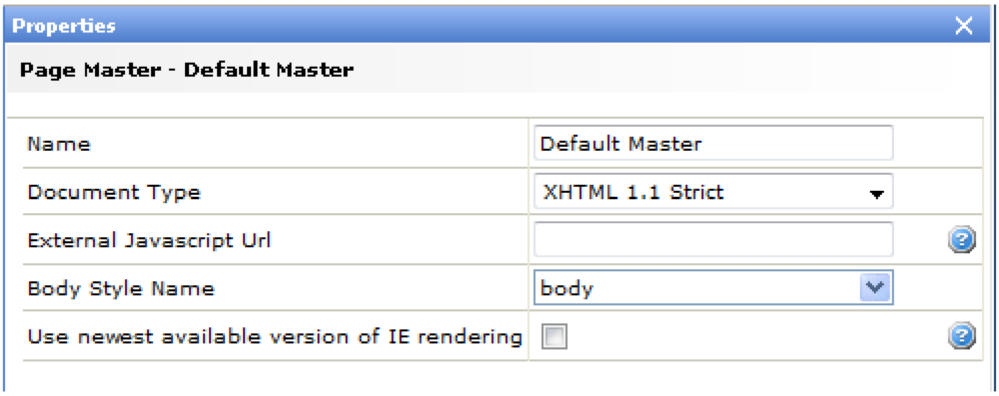


Figure 45 The Properties page for a Page Master

The properties are as follows:

- **Name -** the name of the page master. Here you can edit it as required.
- **Document type -** choose a standard for the document type.
- **External Javascript Url -** you can refer to an external Javascript file in the page master. Enter the URL of the .js file you wish to use. You can add multiple URLs to the field; use a comma (,) as the separator.
- **Body Style Name –** the style to be set for the BODY-tag in the document.
- **Use newest available version of IE rendering -** Internet Explorer versions later than 7 render pages very differently from Internet 6 and 7. Therefore Forsta Plus normally runs all surveys in a compatibility mode which makes newer versions of Internet Explorer behave like Internet Explorer 7. This then avoids the extra complexity related to creating html and css that behave the same in all versions of Internet Explorer. Select this option to turn the compatibility mode off, thereby allowing Internet Explorer always to run in the best available mode, based on Doctype and Internet Explorer version. Use this property in combination with the HTML5 doctype option to run Internet Explorer 8 and 9 (and later) in the most modern rendering mode available in these browsers.

  The article by Microsoft at the following URL explains the subject in more detail: http://msdn.microsoft.com/en-us/library/cc288325(v=vs.85).aspx

2. Set the properties as required, then save the changes by clicking the Save button above the Page Master Designer area.

5.4.4.1.3. How to Edit a Page Master

To open a Page Master for editing, double-click the name of the Page Master In the toolbox, or right-click on it and choose **Edit**. The page designer opens at the Layout tab.

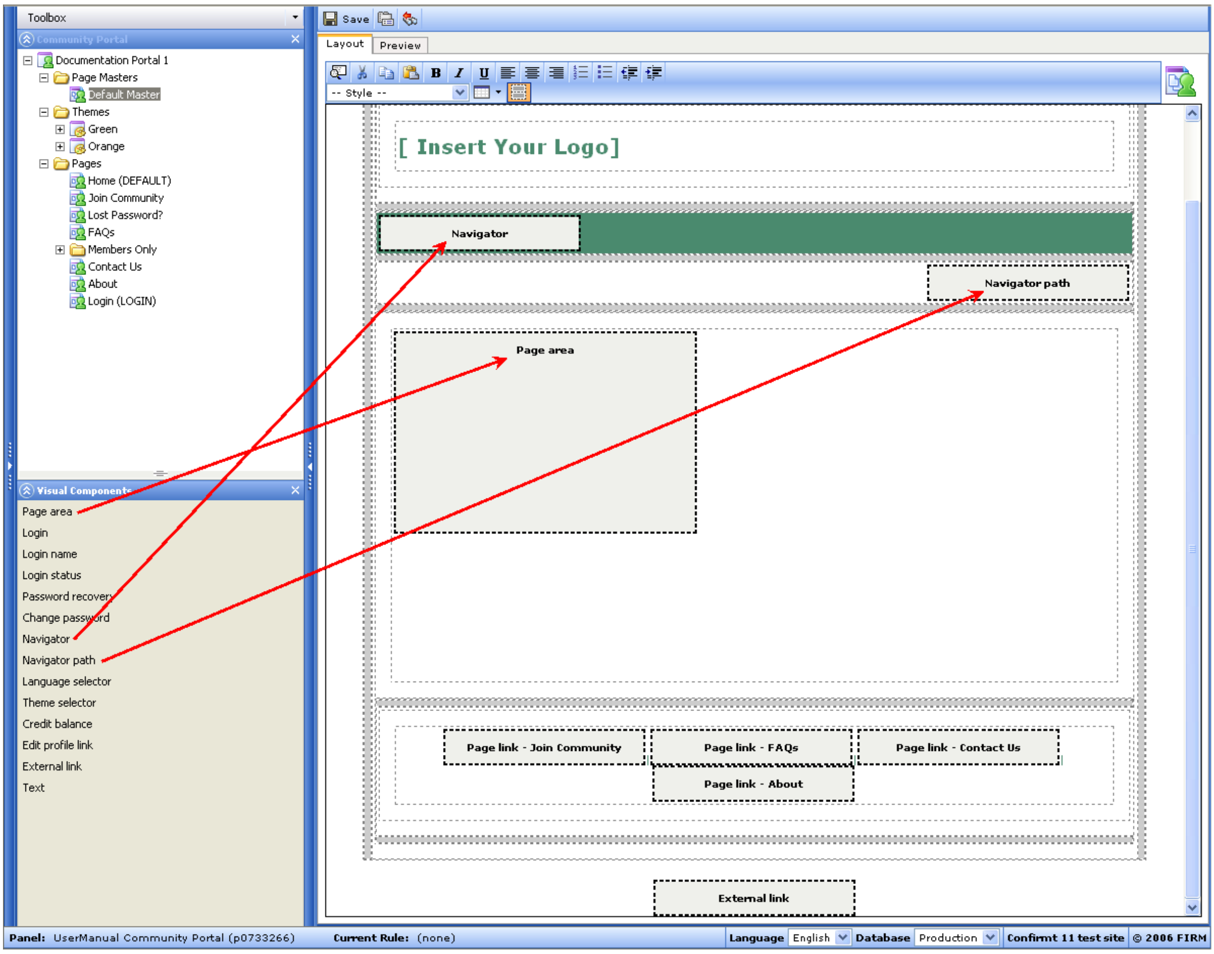


Figure 46 Example of a Page Master

On the Layout tab, you specify which Visual Components (page elements) are to be included on the page, and where they are to be located.

To define the look-and-feel for each of the Visual Components, double-click the component or right-click on it and choose **Properties** (see Visual Components on page 55 for more information).

Go to the Preview tab to preview the current version of the Page Master. Remember to save any changes you may have done before previewing the Page Master.

For more information on using HTML tables, free-from text, and images on your portal pages, see Editing your Page Masters and Portal Pages.

5.4.4.2. The Themes Folder

A theme is a collection of different Styles, each holding a specific layout definition. Inside a Panel Portal you can have as many different themes as you wish, but only one can be active at a time. You can specify one theme to be the default, and this theme will then be used whenever no other theme is specified. You can however select other themes to be used for specific pages and components.

To set a theme as default, right-click on the desired theme and select **Set as Default**. Forsta Plus will display the text (DEFAULT) next to the default theme in the Panel Portal toolbox.

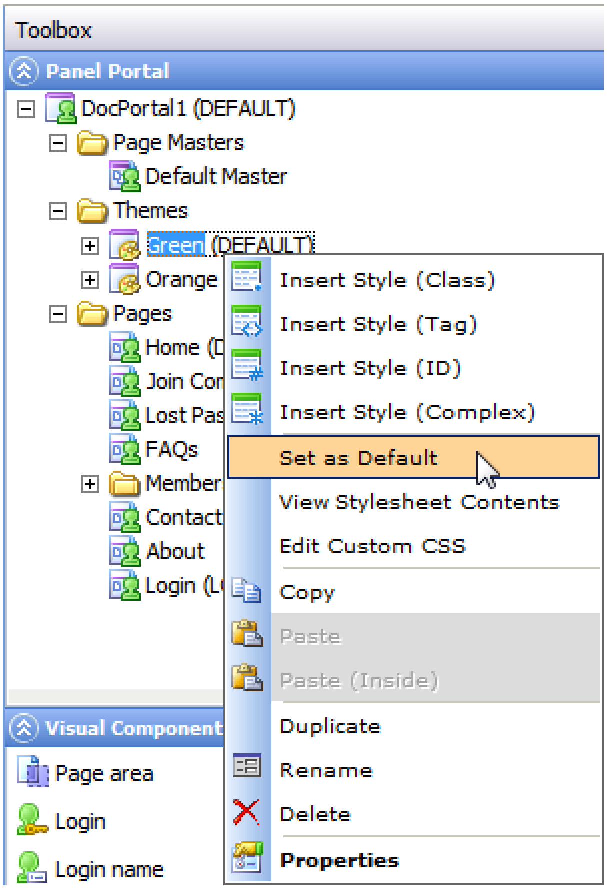


Figure 47 The default theme

You can allow the panelists to select a theme so they can "personalize" their portals. To give the panelists this possibility, place a Theme Selector component into the master page for the portal (see Visual Components on page 55 for more information). If a panelist chooses not to select a different theme, then the portal will be presented using the default theme.

You can also have Forsta Plus select the theme to be used depending on a panelist's answer to a question in the panelist questionnaire. For example you could have Forsta Plus use different themes for males and females under and over the age of 20. In this case you use the Theme Code property to set up the specifications (see The Theme Code Property on page 47 for more information).

Once you have set up the Theme Code functionality, you can define in the email link that the panelist uses to open the portal the theme to be used (see Adding a Theme Code to the Email Link on page 49 for more information).

5.4.4.2.1. The Theme Code Property

You can program Forsta Plus to select a theme automatically for a panelist depending on answers given in the questionnaire. This involves using the Theme Code property, which causes the default theme to be overwritten.

Note: If a Theme Selector component is included on the Master page for the portal, then the theme specified in the Theme Selector will over-write the theme specified by the Theme Code. You are therefore recommended to remove the Theme Selector component (if one exists) from the page master before starting this procedure.

1. Ensure that the **Themes** folder in the Panel Portal toolbox contains the themes you wish to be available for the panelists.
2. In the panel questionnaire (Panel Setup menu), include a single question and give it a logical name, for example "ThemeCode".
3. Add the theme options as the answers to this question, and set the codes for the answers to be something specific.

For example, if the themes available are to be "Green" and "Orange", then it would be logical to set the question's answers to "Green" and "Orange", and the codes to "g" and "o" respectively as in the figure below.

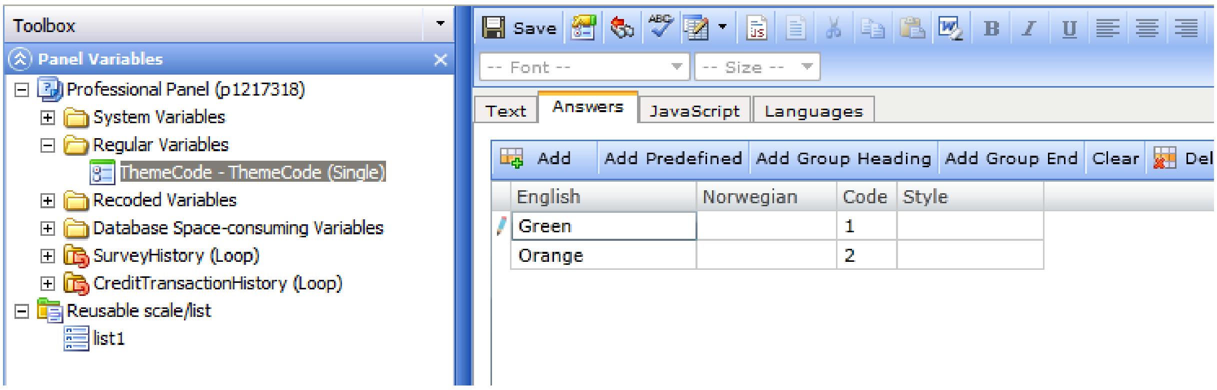


Figure 48 Example of a Single question in the panelist questionnaire to set the theme for a panelist

As the theme selection is to be automatic, the question would normally be "hidden".

4. Generate the database for the panelist questionnaire.
5. In the **Panel Utilities > Panel Portals** page, select the portal you wish to work with.
6. In the Panel Portal toolbox, double-click on the **Portal** node or right-click on it and select **Properties**.

   The Properties page for the portal opens.
7. Click the down-arrow beside the Theme Code Variable field and select the variable (question) that you have created earlier.
8. Save the changes.
9. In the Panel Portals toolbox, the Themes folder contains the available themes. Double-click on a Theme or right-click on it and select **Properties**.

   The Properties page for the theme opens as shown below.

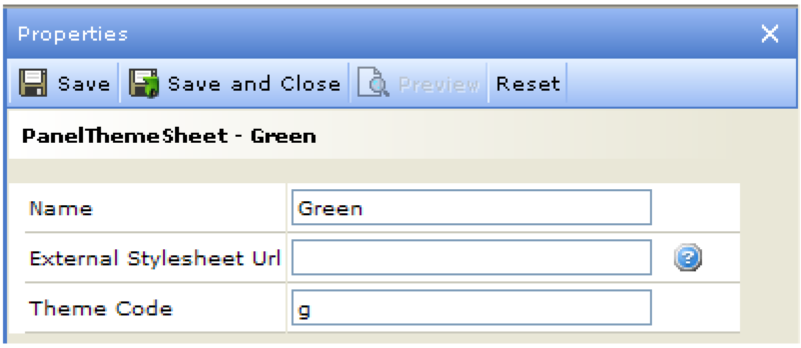


Figure 49 The Properties page for the Green theme

10. In the Theme Code field, type the code for the theme as specified earlier in the procedure.

    In the example above, the code for the Green theme was set to **g**.
11. Save the changes.

You can now go into the **Panel Management > Single Panelist Editor** page and set the **ThemeCode** variable to the desired theme for specific panelists, and you can also of course use a panel rule to set the theme for sets of panelists simultaneously.

5.4.4.2.2. Adding a Theme Code to the Email Link

Once you have set up the Theme Code functionality (see The Theme Code Property on page 47 for more information) you can add a Theme Code to the email link that is sent to the panelists. To do this, type:

tc=<precode>

onto the end of the link that is to be sent to the panelist.

This can also be done automatically using scripting and piping, but this is only for advanced users and the details are beyond the scope of this manual.

Note: Adding a Theme Code to the email link will automatically over-ride all other theme selections.

5.4.4.3. Styles

Click the plus sign in front of each Theme to see all the styles for that Theme. The figure below shows the styles available in the Green theme. When the Green theme is in use, the Visual Components (and free-form text) can be assign any of these look-and-feel definitions.

To set a Style for a Visual Component:

1. Double-click the component on the page, or right-click and choose **Properties**.

   The component Properties pane opens.

2. One of the properties listed is the Style Name. Click the down-arrow button beside the property to open a drop-down list of the available styles, and select the required style from the list.
3. Click **Apply** or **Apply and Close** to apply the change.
4. On completion, save the changes.

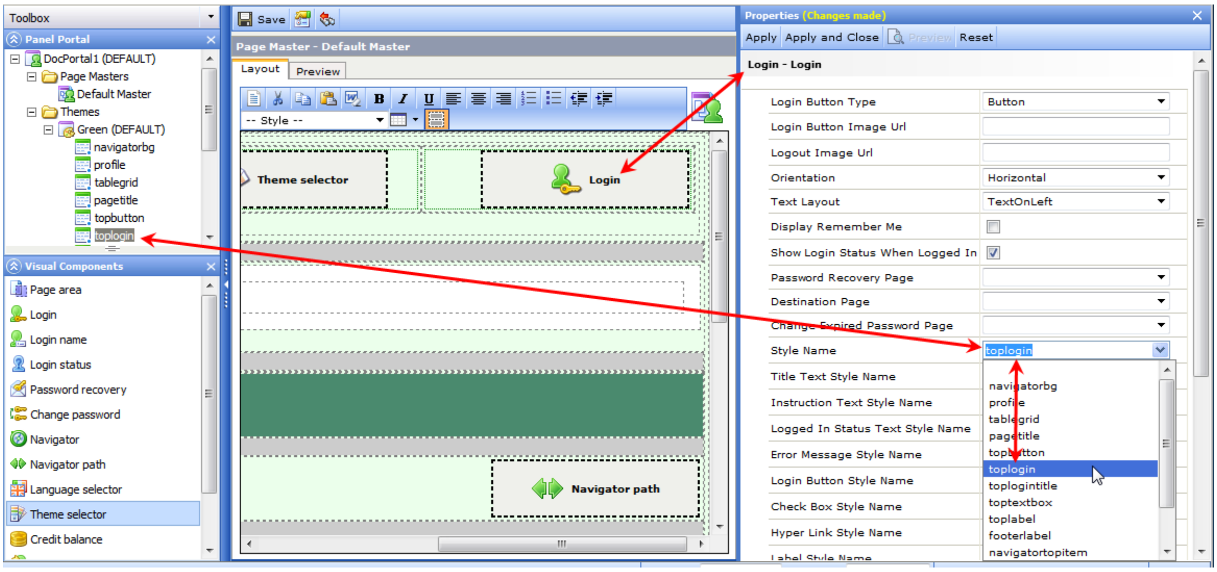


Figure 50 Applying a style for a Visual Component

Each style has its own set of properties as appropriate for the style's requirements. Below is the properties pane for the pagetitle style. As this style is a "Text" component, it requires a number of font properties.

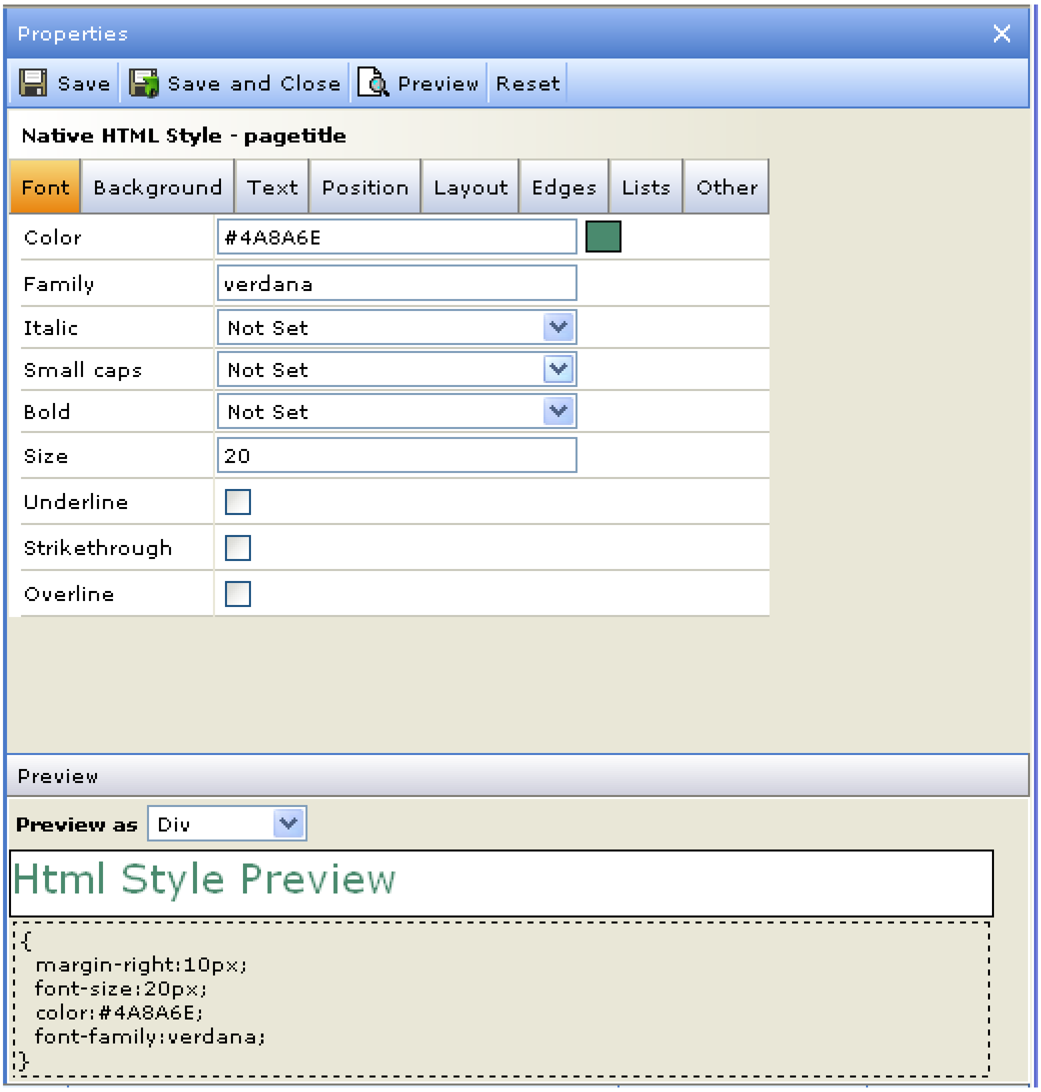


Figure 51 Style properties

When you change a setting, Forsta Plus provides an instant preview of the style so that you can see how the change affects the style. Also, when making changes to a style, each alteration (setting) is listed below the preview so that you can see which settings have been set for that style (see Visual Components on page 55 for more information).

5.4.4.4. View Stylesheet Contents

You can view all the styles for a theme on one sheet.

- Right-click on a Theme and choose **View Stylesheet Contents**.

Forsta Plus will then list all the styles for that Theme. This can be useful if you want to quickly find the definitions of all styles, typically for use outside this theme.

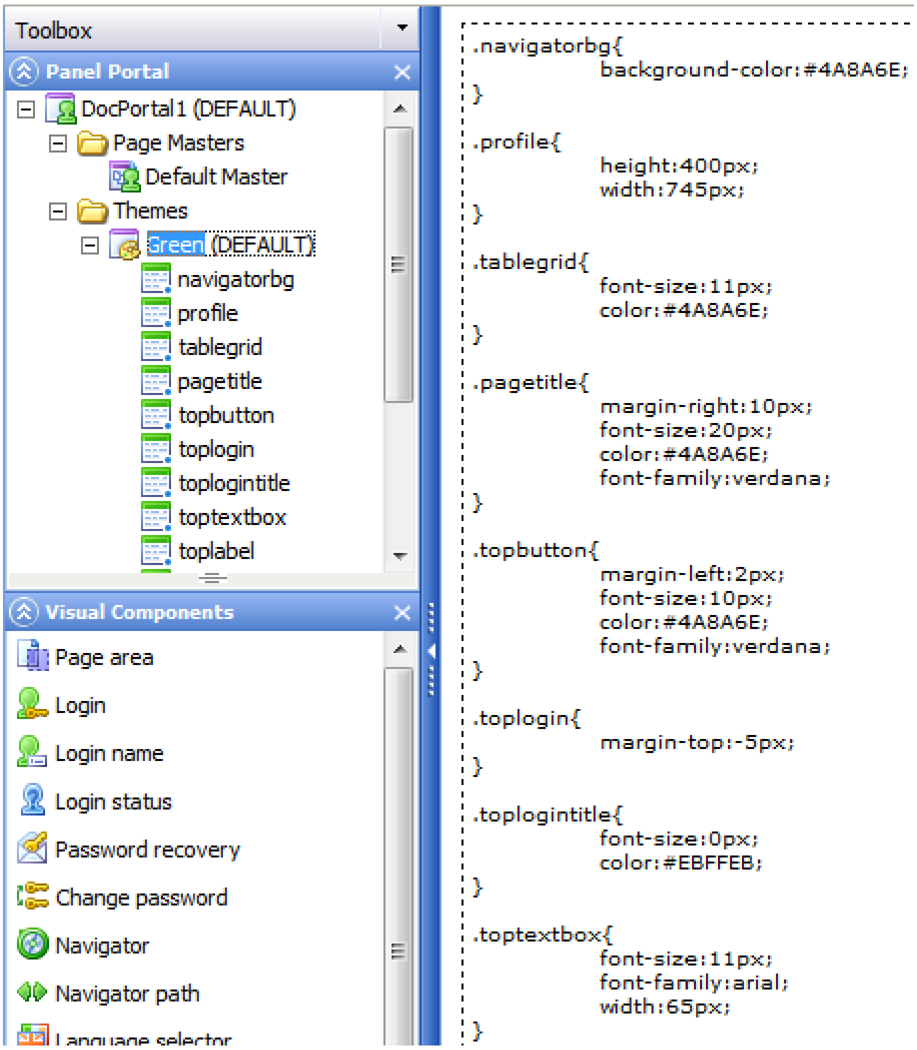


Figure 52 Viewing the Stylesheet Contents

5.4.4.5. The Pages Folder

The third main folder inside the Panel Portal toolbox is the “Pages” folder. This is where you set up the portal pages.

5.4.4.5.1. How to Create a New Page

To create a new page in the Portal:

1. In the Panel Portal toolbox, right-click on the Pages folder text to open a drop-down menu.
2. Select **Insert Page (Inside)**.

   Or: Right-click on an existing page and choose **Duplicate**.

5.4.4.5.2. How to Edit a Page

Double-click on a page in the **Panel Portal > Pages** folder to open the page for editing. The Panel Portal Designer page opens for the selected page. This is where you select the Visual Components that are to be used on the page, and position them on the page.

A new page has been created in the Pages folder, called in this case Example Page (see How to Create a New Page on page 51 for more information). This page will now be used to provide worked examples of the various procedures used when editing a page.

On this page it has been decided to show some text (the text element), an external link, a link to the page called “Home”, and an image will be inserted across the bottom of the page.

1. The first step is to set the Page Master (see The Page Masters Folder on page 45 for more information):

   Right-click on the page and select Properties from the drop-down menu. The Properties pane opens. The first property in the list is Page Master.

   Right-click on the down-arrow beside the Page Master field to open a drop-down list of the page masters available, and select the desired page master from the list.

   If several languages have been defined for the Portal, then on this Properties page you can also type in translations of the title and description for the non-default languages.

   Save the changes.

   The “Page Area” element determines where the page (portal page) is located on the overall page (Page Master) (see How to Create a Page Master on page 45 for more information).

   In other words, overall browser views are set up as Page Masters. The individual portal pages are set up under “Pages”, and you assign a Page Master for each page (if you do not, the default Page Master will be used). The portal pages will always appear on the screen where the Visual Component “Page Area” is located.

2. Set the Page as Default / Login

   In the same way as one Theme is set to be default, one page is also set as the default page. This will then be the first page that the respondent sees when he/she goes to the Panel Portal. In most cases this will be the starting page (home page).

   Right-click the page and choosing **Set as Default**. Forsta Plus will show the default page each time a new visitor enters the portals.

   The page you wish to use as the login page must also be specified. To do this, right-click the page and selecting **Set as Login**. Forsta Plus will display the text “LOGIN” next to the login page in the Panel Portal toolbox.

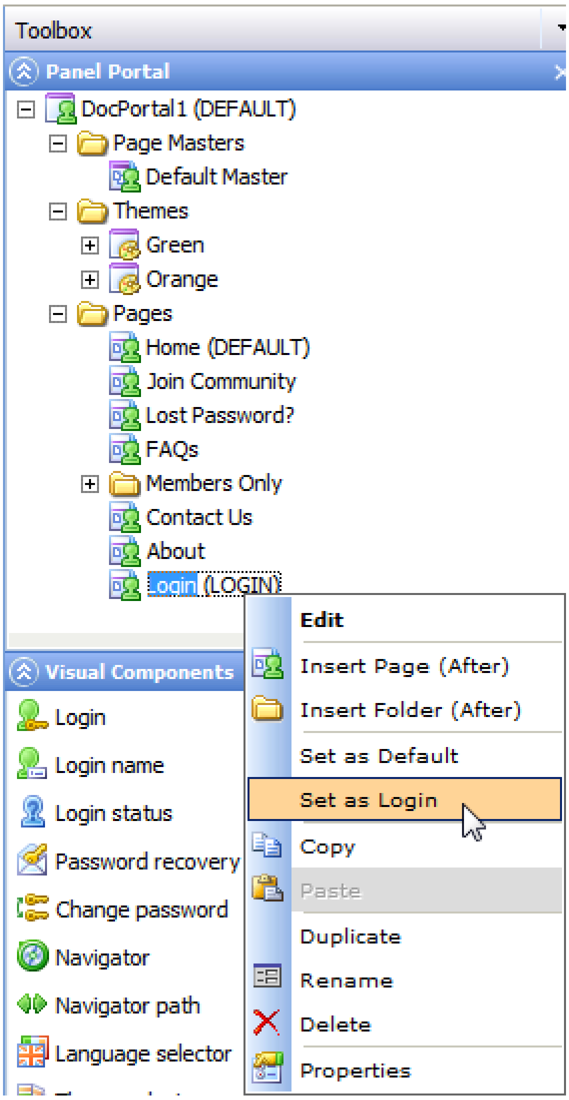


Figure 53 Setting the Login page

5.4.4.5.3. Page Properties

To open the Properties pane for a portal page, right-click on the page in the Panel Portal toolbox and choose **Properties** from the menu, or when the page is open for editing click the **Show/hide Properties** button in the Editing pane toolbar. The properties pane opens alongside the page.

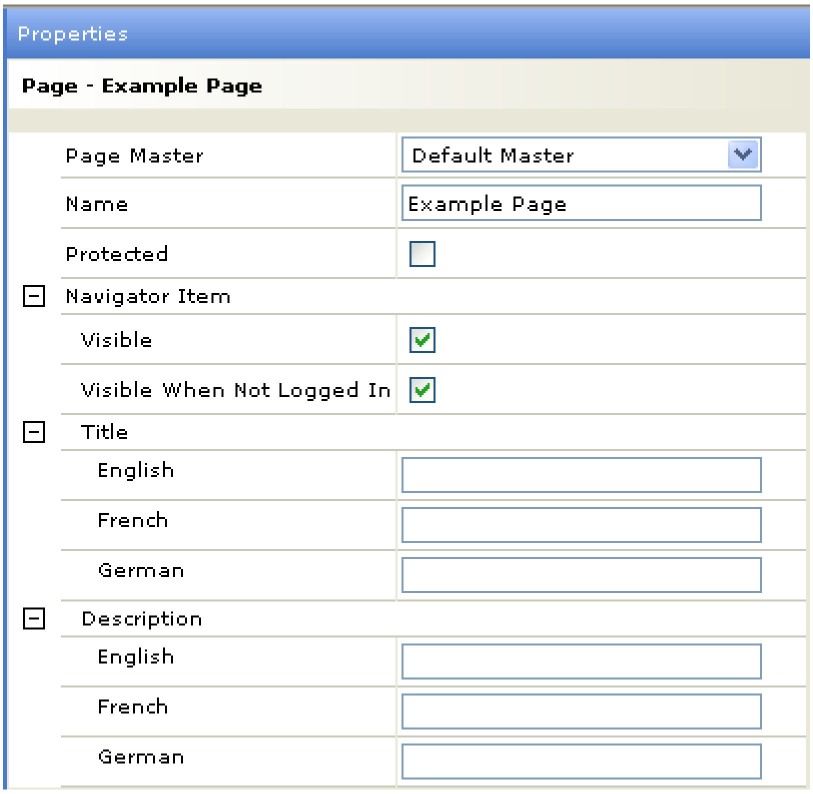


Figure 54 Example of a Page Properties page

The page properties are as follows:

- **Page Master** – defines the layout for that page (see The Page Masters Folder on page 45 for more information).
- **Name –** the name of the page. You can edit this at any time.
- **Protected** – check this box if you want this page to be accessible only to people who are logged in. If a page is not protected all visitors can see the page.
- **Navigator Item** – defines when the page is to be visible in the menu bar (see Folders and Structure on page 54 for more information).
- **Visible –** leave this box checked if you wish the page to be visible in the menu bar all the time. If the box is unchecked, then the page will not show.
- **Visible when not logged in–** leave this box checked if you want the page to be visible to all visitors to the site. Uncheck the box to hide the page from those who are not logged in.
- **Title** – the portal can be made available in any number of languages. These languages are selected when the portal is first created, or can be added later (see Panel Portal Languages on page 40 for more information). The respondents can select the language (from the list available) in which the Portal is presented. The Title property provides one field for each language selected. Type into the fields the page titles in the various languages.
- **Description –** here you specify for each language the text you wish to appear when a respondent points to the page on their screens (mouse-over).

5.4.4.5.4. Folders and Structure

Folders are used inside the “Pages” section to create a menu structure for the portal pages. Each folder will be presented as a clickable sub-menu for the panelists.

To insert a new folder:

1. Right-click on an existing folder and select either **Insert Folder (Inside)** or **Insert Folder (After)** as appropriate.

2. Once you have created the folder, create pages inside the folder or place them there using drag-and-drop. Note that you can have folders within folders.

In the figure below, note how the pages Example Page, Home, Join Community, FAQs, Contact Us, and About are displayed as separate pages on the menu bar. The folder “Members Only” creates a drop-down menu which leads to the pages inside the folder. The Lost Password page does not appear here because the Visible property in the page's Properties page has been unchecked. The login page is only displayed when someone attempts to enter a restricted page.

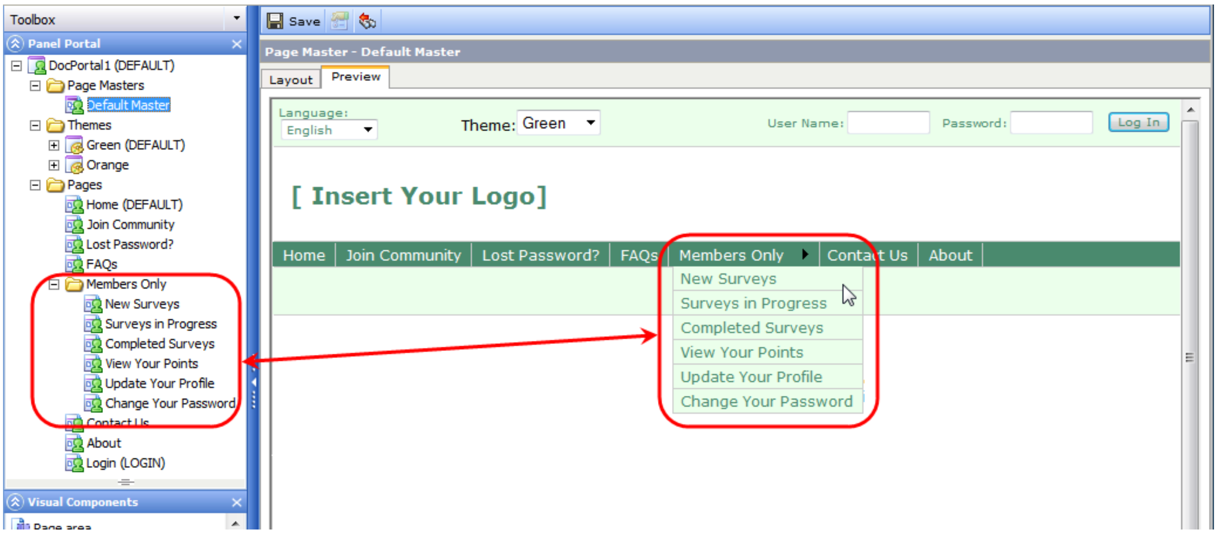


Figure 55 Using a folder to create a menu layout

5.4.4.6. *Visual Components*

The Visual Components are “prefabricated” elements you can use on the portal pages. Page Masters and “normal” pages have different sets of Visual Components available, reflecting the pages’ different functions.

The procedure for inserting Visual Components is the same for Page Masters and Pages. Note that the Visual Components you insert into a Page will all be located within the Page Area component that is positioned on the Page Master.

5.4.4.6.1. How to Add an HTML Table to the Page

When you first create a page, it will be empty. To simplify the positioning of components on a page, it is recommended that the first thing you create on the page is a table. You can then place the various components within the table cells, and use the cell properties to define the positions of the components. An existing page will normally already have a table.

1. Double-click on the appropriate page in the Panel Portal toolbox **Pages** folder, or create a new page (see How to Create a Page Master on page 45 for more information).

   The Page Editor for the page opens.

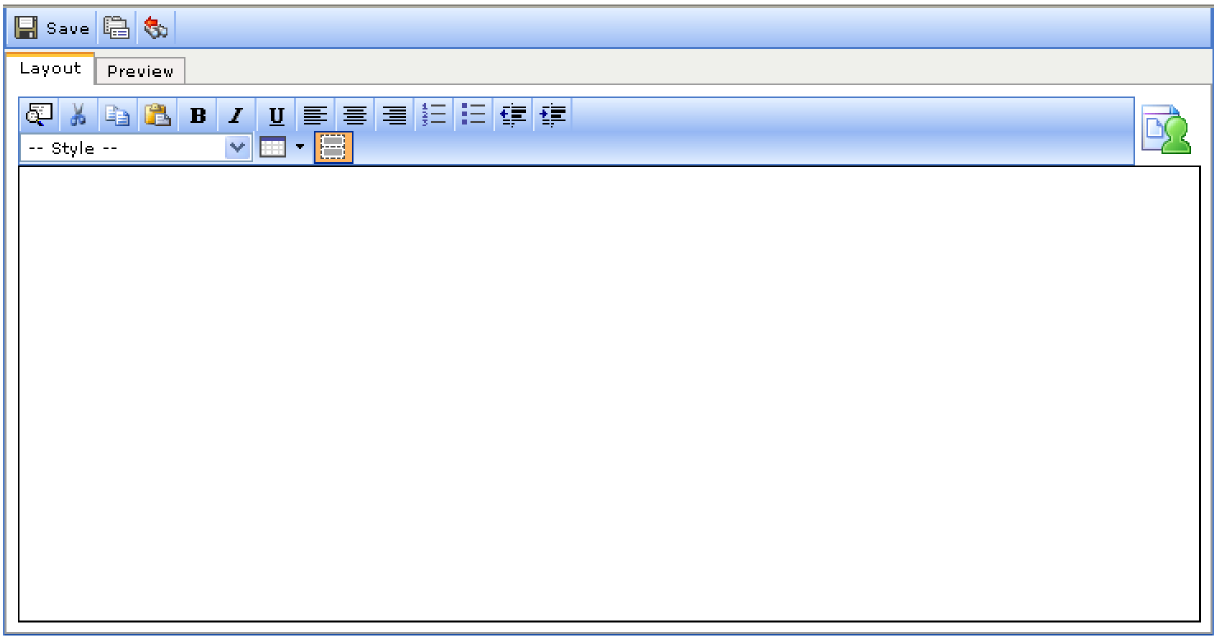
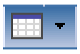


Figure 56 The blank page editor

2. To create the table, click the **Table** button  (A in the figure below) in the page editor toolbar to open the table selector, move the pointer to the right and down until the required number of rows and cells are selected, then click in the lower-right selected square.

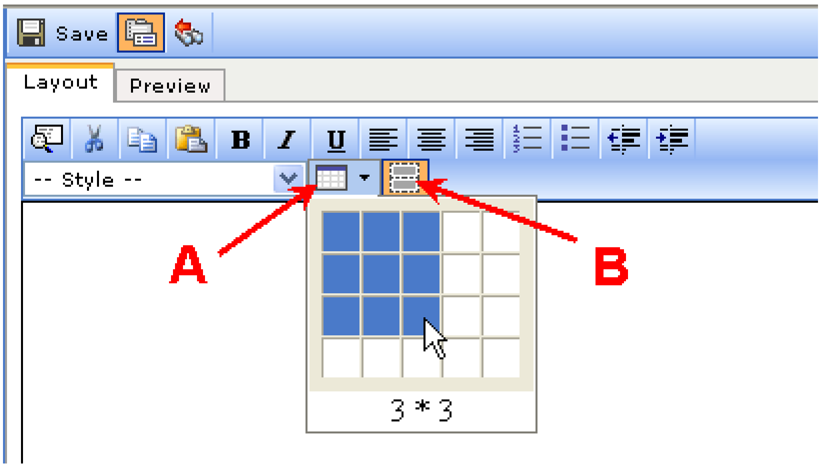


Figure 57 Creating a 3x3 HTML Table

While working in the Portal Designer, a dotted grid is displayed as a visual guide so you can see the table and cell boundaries while editing. The table will not be visible on the portal page. If you wish to see the page without this grid, either select preview, or click the **Show/hide grid** button (B in the figure above).

3. Right-click in the table and select **Table Properties** from the drop-down menu to open the Properties page for the table.
4. Right-click in a cell and select **Cell Properties** from the drop-down menu to open the Properties page for the selected cell.
5. In the right-click menu you can also add and delete rows and columns for the table.
6. On completion, click **Save** to save the changes.

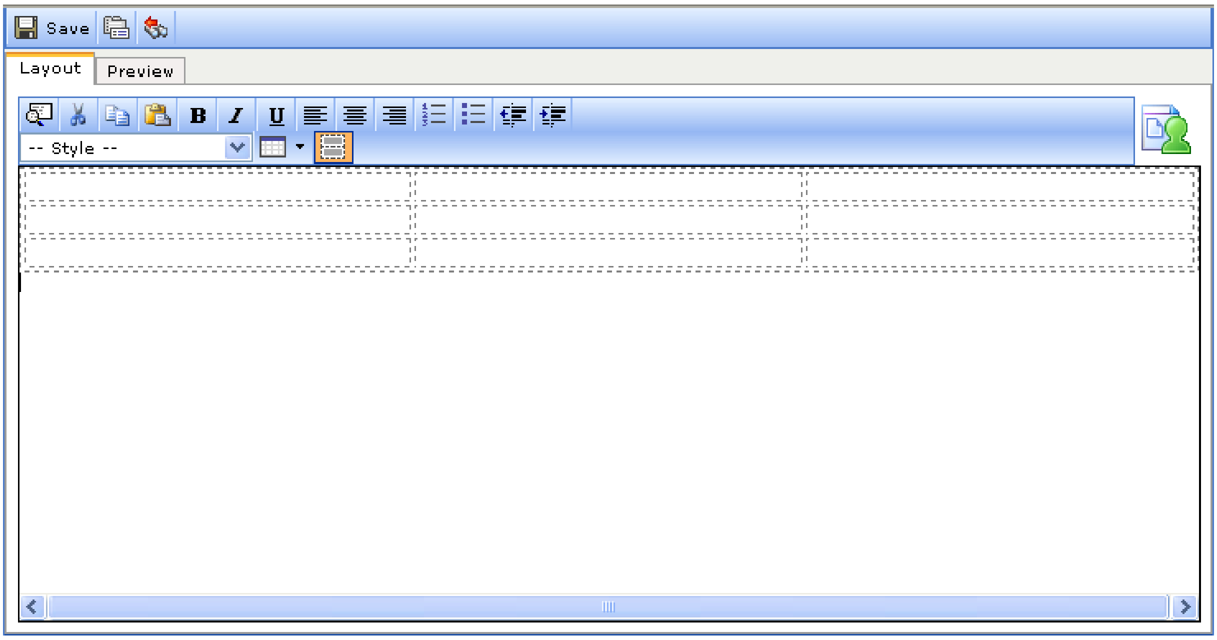


Figure 58 The resulting 3x3 table

5.4.4.6.2. How to Add a Visual Component to the Page

A page can include any number of visual components. From the Visual Components toolbox, which contains all the various page elements, we will now drag a component and drop it in the upper left cell.

1. Go to the **Visual Components** toolbox, click on the component you wish to insert, and drag it up to the appropriate field in the table.

   Or:

   Right-click in the appropriate cell, choose **Insert Component**, then select the desired component from the drop-down list.

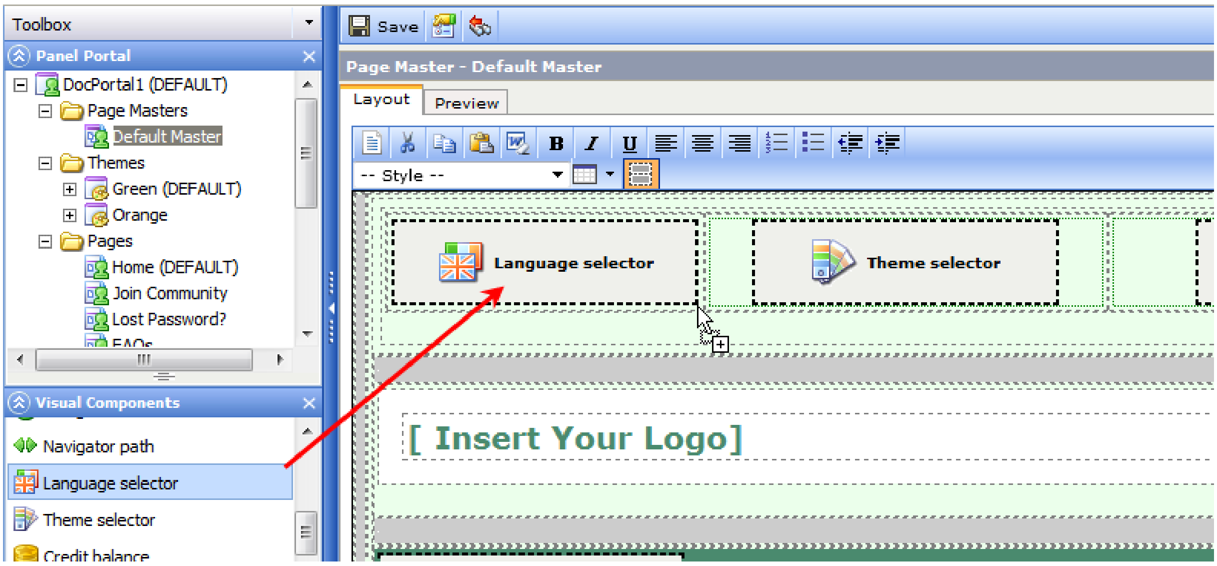


Figure 59 Dragging a Visual Component into the table

In the example, a Language Selector component is being dragged into the upper-left cell of the table. You can now open the component's, the cell's and/or the table's Properties pages and set up the component as required.

2. On completion, click **Save** to save the changes.

5.4.4.7. The Visual Components Toolbox

Page Masters and "normal" pages have different sets of Visual Components in the toolbox, reflecting the pages' different functions. The following sections describe all the components available.

Each Visual Component has a Properties page that contains properties particular to that type of component. The Properties page enables you to select the characteristics for the specific component, and in many cases what information the component displays and how it is displayed to the panelist. To open the Properties page for a component, double-click on the component or right-click and select Properties. Refer to the separate Professional Authoring User Manual for further information on the properties.

5.4.4.7.1. Page Area

The Page Area component determines where the page (portal page) is located on the overall page. This component is only available for a Page Master.

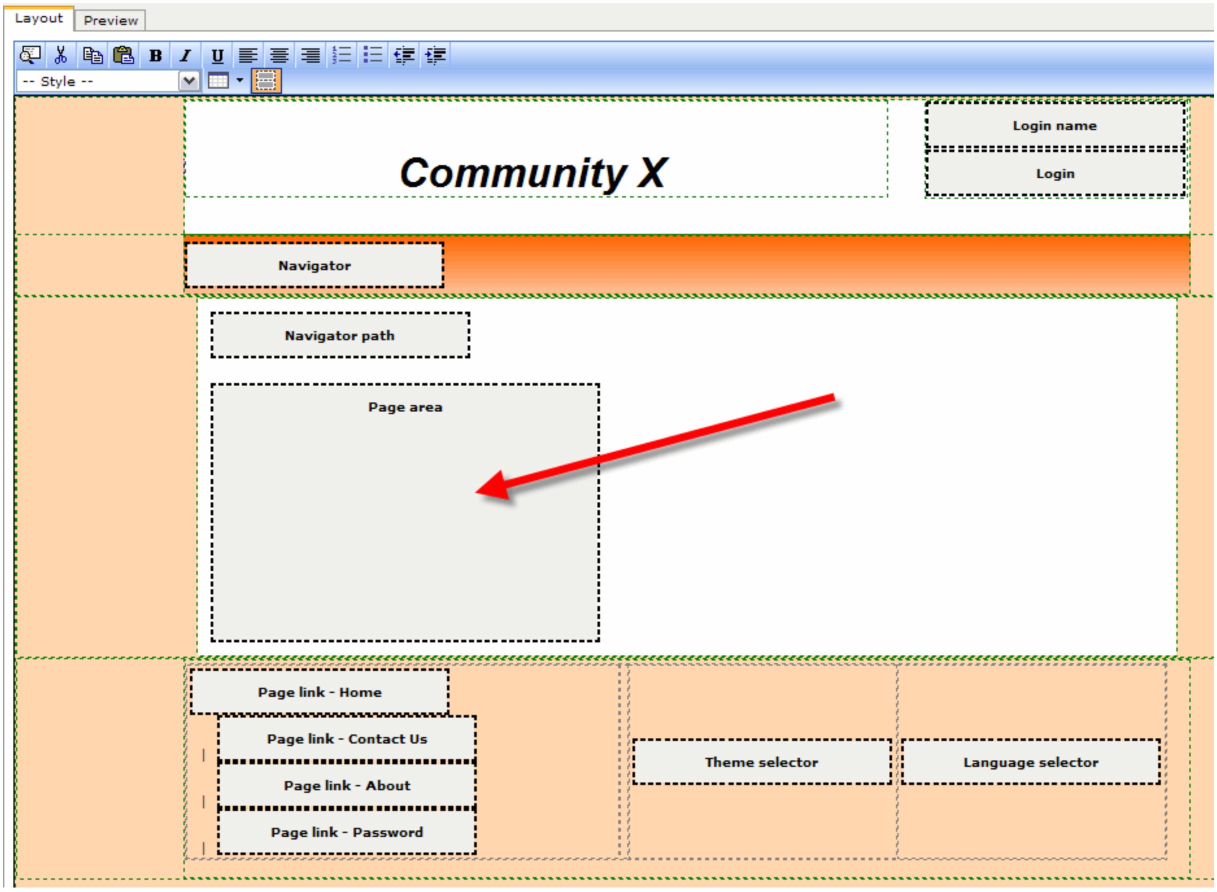


Figure 60 A Page Master with the Page Area element

5.4.4.7.2. Login

The Login element displays the username and password text-fields and the associated Login button to the panelists.

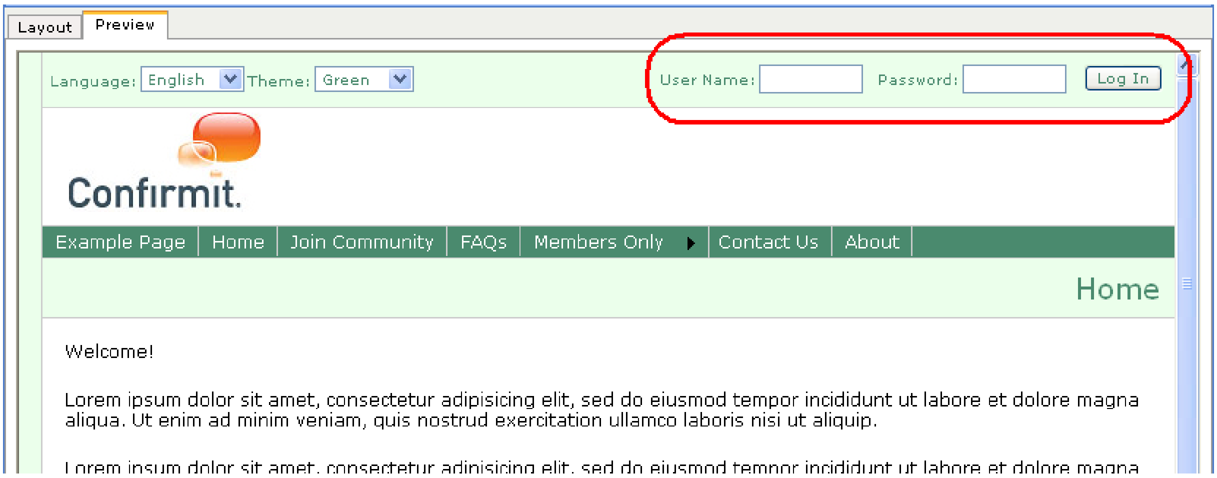


Figure 61 Example of the Login component in use

Note: For Professional and Standard Panels, the User Name will be the user's email address. The user will therefore log in using his/her email address and password.

5.4.4.7.3. Login Name

The Login Name element displays the panelist's username (normally the email address) after he or she logs in. In the figure below, the Login Name element is being set up. Here, a custom text (Format String) is defined so when for example Peter Jones logs in with his username "peterj@firm.com", the text displayed in the page becomes "Welcome peterj@firm.com!"

The "username" is the only element that can be piped into the Login Name component.

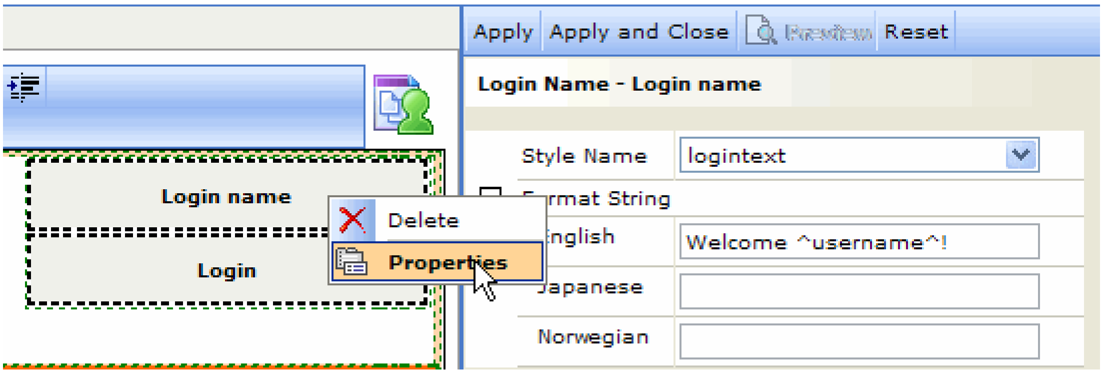


Figure 62 Setting up the Login name component

5.4.4.7.4. Login Status

The Login Status component allows you to place a hyperlink to a login page anywhere in your portal. This element is often used in combination with the property "Show Login Status When Logged In" on the Login component. If this property is checked on the Login component, and the Login component is always displayed on screen (normally part of the Page Master), then the Login Status component may not be used.

5.4.4.7.5. Password Recovery

This component allows the panelist to ask that his or her password be sent to their email address. This requires that the panelist has previously registered.

5.4.4.7.6. Change Password

This component provides the panelist with a link to a page on which they can change their password. The panelist can click the link at any time.

5.4.4.7.7. Navigator and Navigator Path

The Navigator component determines where on the page the menu is displayed. The Navigator path component shows the panelists the history of pages visited.

5.4.4.7.8. Language Selector

If the portal is created in more than one language, then the panelists and other visitors to the site must be able to choose which language the portal is presented in. In this case the selector is located in the upper left corner of the page.

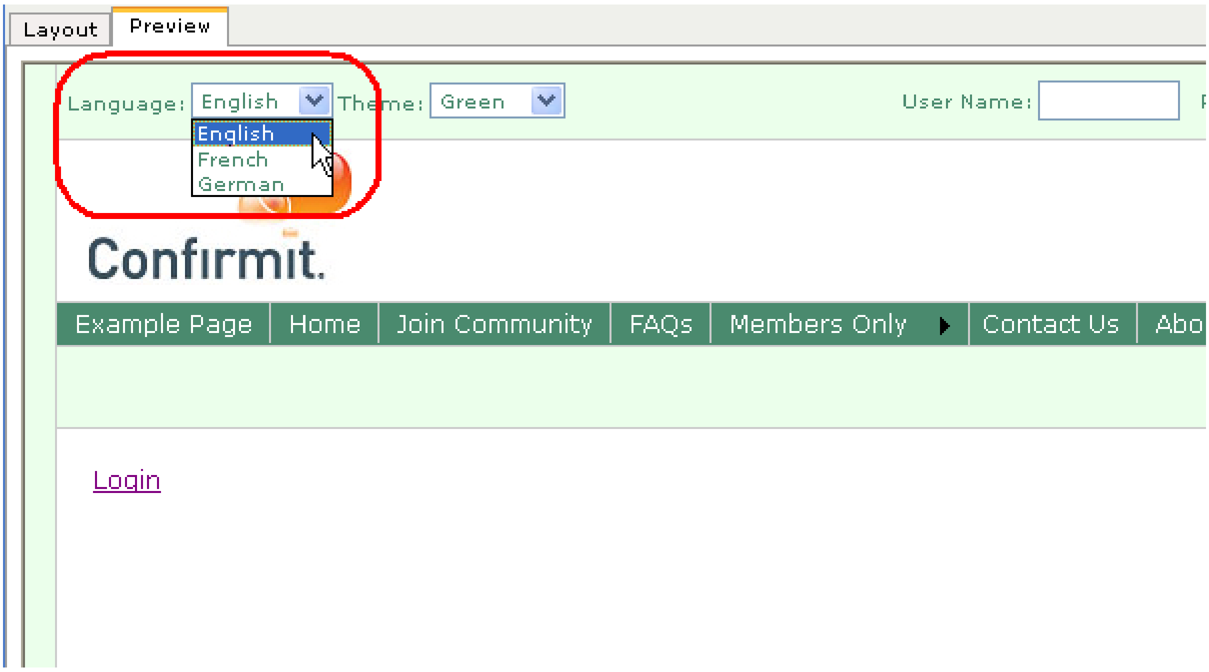


Figure 63 Example of the Language Selector in use

5.4.4.7.9. Theme Selector

If more than one theme is available to the portal, then you can provide the Theme Selector component to allow the panelists and other visitors to choose which of the themes is used for their portal. In the example shown below, the selector is located in the upper left corner of the page (ringed) and the "Green" theme is selected (see The Themes Folder on page 46 for more information).

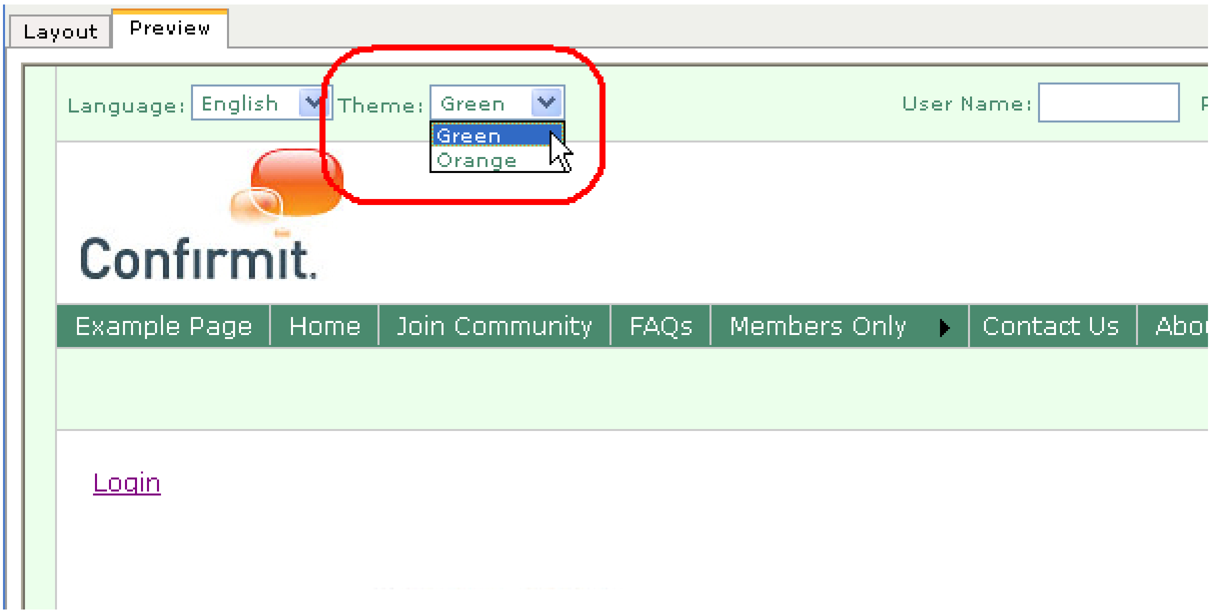


Figure 64 Example of the Theme Selector in use

5.4.4.7.10. Surveys List

This component presents a list of the surveys the panelist is involved with, and can present additional information on each survey in the list. Each Surveys List component on a page can display one type of list, for example "All completed surveys" or "All surveys that are not yet started". If you wish to present several types of list to the panelist, then you must add one Surveys List component to the page for each type of list you wish to present.

5.4.4.7.11. Credit Balance

Forsta Plus keeps track of points earned for panelist participation. Use the Credit Balance component to display the current number of points earned by the panelist. In the example below, when panelists go to the View Your Points page, they will see the sentence "You have N points in your account." The variable N displays the credit balance, starting at zero.

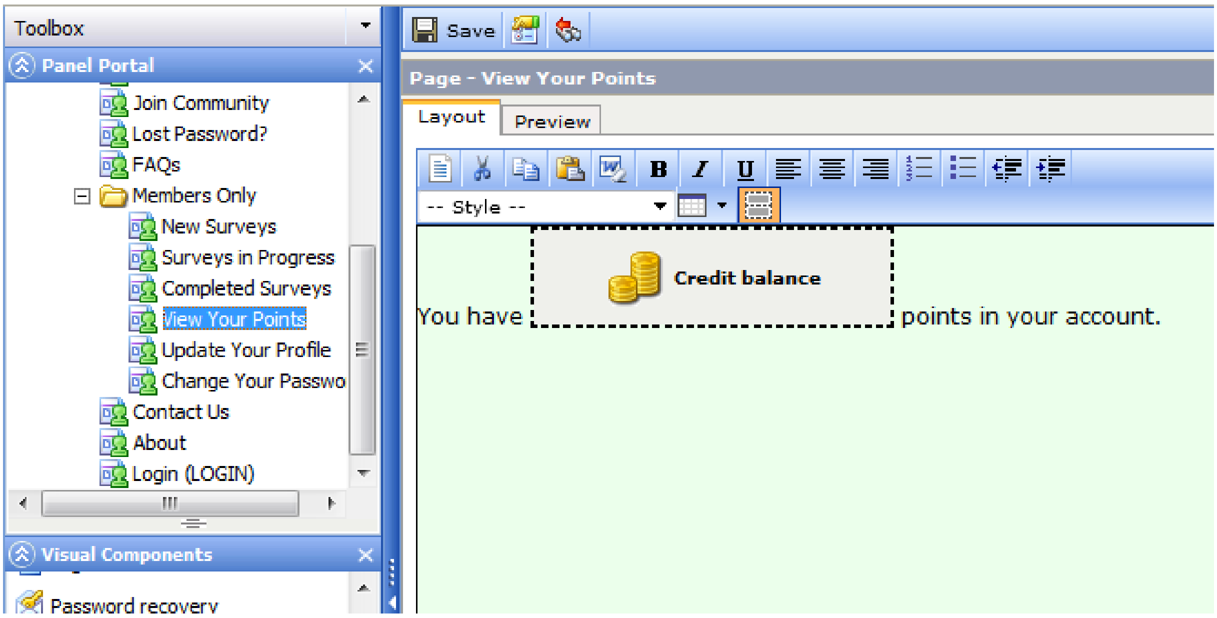


Figure 65 Example of the Credit Balance component in use

Note: You can import and export panelist credits **(see Panelist Credits on page** Error! Bookmark not defined. **for more information).**

5.4.4.7.12. Edit Profile

Your panelists should have the opportunity to update their profiles. This component places a link on the portal page that, when clicked, takes the panelist to the survey they answered when signing up as a panelist. Here they can update their details so that when you next sample the panel for respondents for a particular survey, the group of respondents found for that survey is optimized.

Note: You can use different surveys to update different parts of the panelist database. The link must then refer to the appropriate survey, so you must type the survey's ID number into the Profile Survey ID field.

The survey will appear where the Edit Profile component is placed on the page.

Note that you can have the Edit Profile survey open as an "In-line" frame. This allows you to embed the survey into any web page without having to use iFrames. To do this:

1. Double-click on the Edit Profile visual component to open the Designer page for that component.
2. Right-click on the Edit Profile component on the page and select **Properties** from the drop-down menu.

   The Properties page opens.

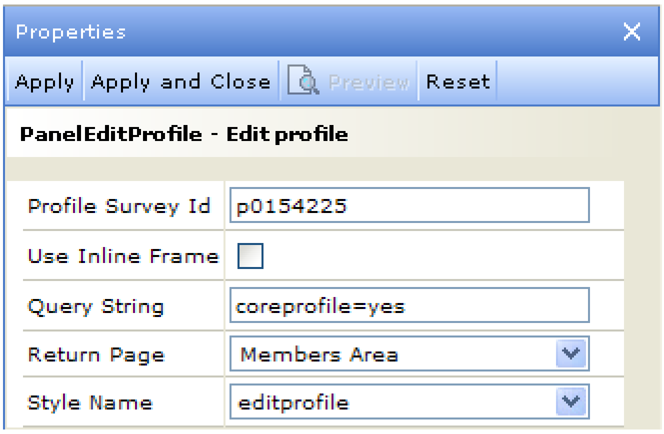


Figure 66 The Edit Profile component Properties page

3. Check the **Use Inline Frame** box.
4. Click **Apply** or **Apply and Close** to save the changes.

5.4.4.7.13. Edit Profile Link

This is basically the same as the Edit Profile component, but takes the panelist away from the portal page and opens the registration survey in the window. Once the panelist has worked through the survey, it is closed and he/she is returned to the portal.

Note: You can use different surveys to update different parts of the panelist database. The link must then refer to the appropriate survey, so you must type the survey's ID number into the Profile Survey ID field.

5.4.4.7.14. External link

You can insert hyperlinks on your portal pages. To do this, drag the Visual Component "External link" onto a page, then double-click the element (or right-click and choose **Properties**) to set the properties for the element. One property that must be set is the URL for the link.

5.4.4.7.15. Link Target

Use this component to embed an external link on a portal page. If/when the panelist clicks this link, the external site will open in the portal page.

5.4.4.7.16. Text

Use the Text component to display text on a portal page. Note that you can enter text directly onto a page (see Free Text on page 68 for more information), however If you do the text will be the same for all panelists, regardless of language. If you use the Text element, you can to specify text for each language selected for the portal, and Forsta Plus will display the text in the language chosen by the panelist via Language Selector (see Language Selector on page 60 for more information).

5.4.4.7.17. Poll

You can link Polls to a Panel and embed the panel in the Panel Portal.

If you have created a Poll going through the “New Poll” wizard (refer to the Authoring User Guide for further information), you can return to the Project Overview page before launching the poll and set up a link to the Panel. This will automatically add “panelistid” to the project.

In Panel Portal, you can insert the Poll component on any page:

1. Right-click on the component and select **Properties** to open the Properties page.
2. In the Poll Survey ID field, type the project number of the poll.
3. Decide whether it should only be available for panelists who are logged in, those who are not logged in, or both.

Note: For a logged in panelist, the system will automatically capture the panelistid and store it in the Poll database. This makes it possible to merge the poll results with panelist profile data, for reporting, or for adding the poll answers to the panelist database.

4. Apply the changes and Save.

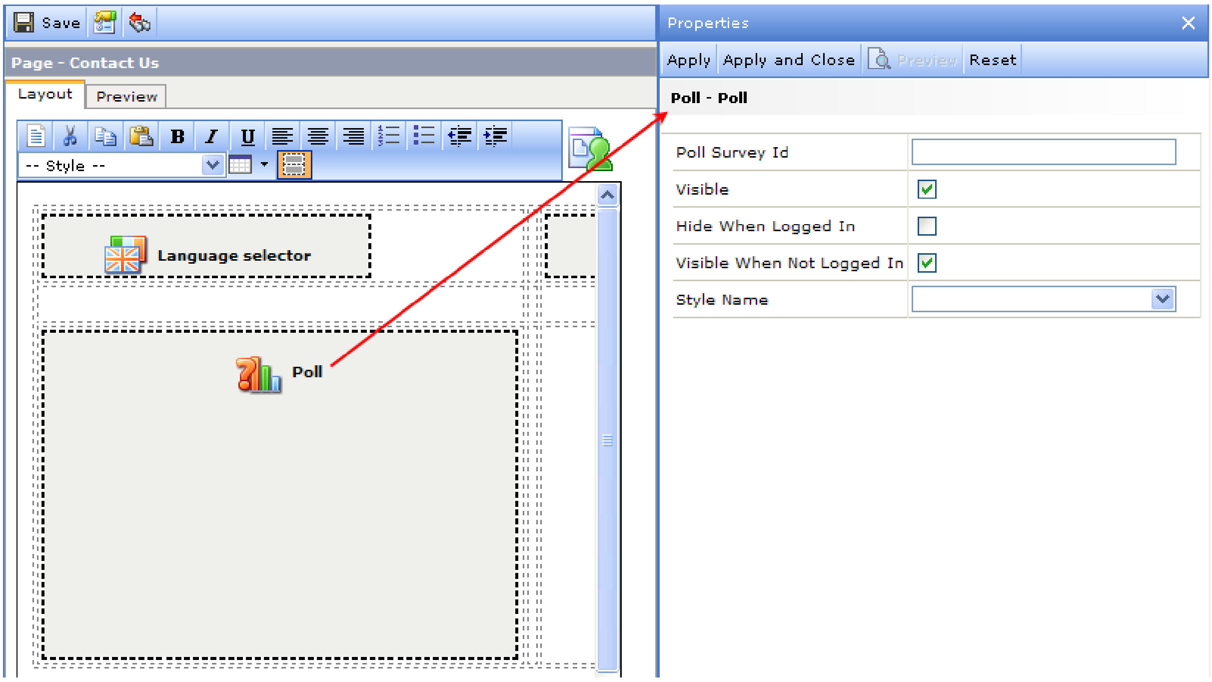


Figure 67 Setting the properties for a Poll visual component

5.4.5. Properties on a Panel Portal

To set properties on the portal level, right-click on the portal name, and choose **Properties** or double-click on the portal name. The Properties page opens.

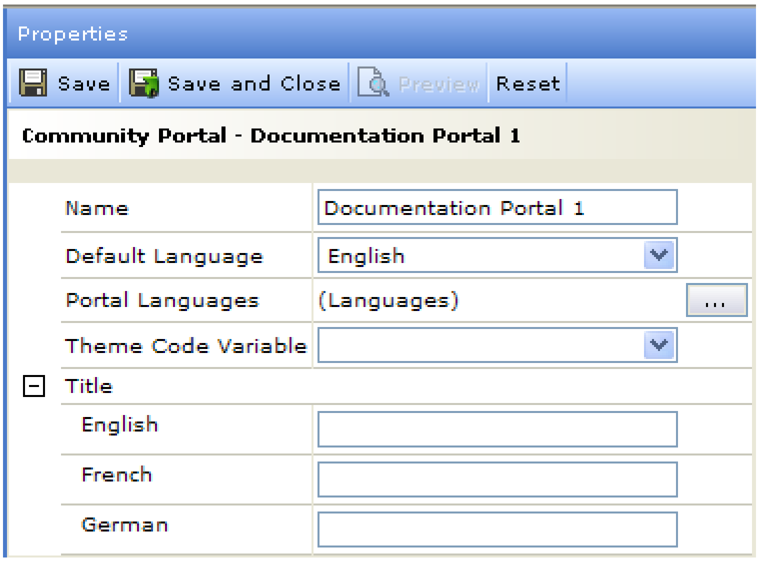


Figure 68 Setting the properties on the portal level

- The portal name is displayed at the top of the property sheet. You can change the name by typing a new name into the field.
- **Default Language** - specify which of the Portal Languages is to be the default. This language will be used as the first-entry language and whenever another language has not been chosen.
- **Portal Languages** - select the languages you wish the panelists to be able to select between. In the example above, English, French and German are selected.
- **Theme Code Variable** - specify the question to be used as the deciding element when Theme Codes are to control the theme used by the portal (see The Theme Code Property on page 47 for more information).
- **Titles** - specify the title that is to be used for each language. These will be displayed to the panelists and other visitors.

5.4.5.1. Managing your Panel Portals

You can create as many Panel Portals as you require. However, only one portal can be publicly active at a time on each panel. You would normally build your portals inside the panels so that you have full control of how the portals will look.

5.4.5.1.1. How to Publish a Panel Portal

Several Portals can be published for a panel at one time. The name of the default portal is presented in bold text. The default portal is the portal that will be used if no other is specified.

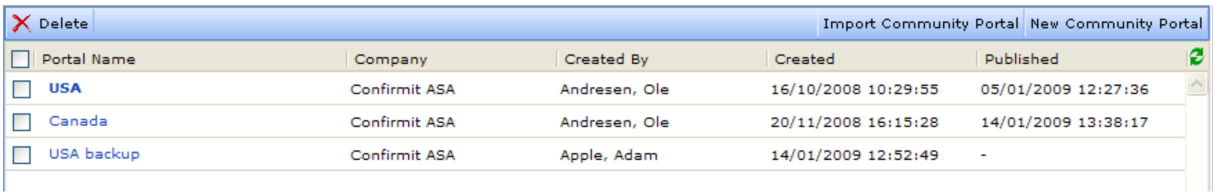


Figure 69 Example of the Panel Portal List, the default portal in bold

When a portal is published, the Panel Portal URL becomes available from the **Project Management page > Overview tab** and any changes you make to the Portal become public. The date and time a portal was last published are displayed in the published column.

To publish a portal:

1. In the Panel Portal toolbox, right-click on the portal name to open the drop-down menu.
2. Choose **Publish** from the menu.

If you wish to remove a portal from public view then you can "Unpublish" it. Once the portal has been published then the **Unpublish** option becomes available in the right-click menu. If a portal has been specified for as particular set of panelists, and that portal is later unpublished, the those panelists will be presented with the default portal.

5.4.5.1.2. Testing your Panel Portal

While working with the portals, you may need to test how different portals function together with your panel. Forsta recommends that you have all relevant portals added to the panel. You can then try the different alternatives in **Preview**.

If you wish to make changes to a portal to for example try a different look or setup, you would probably save considerable time by duplicating an existing portal instead of creating a new one and starting from the beginning.

5.4.5.1.3. Managing your Portal within your Panel

To list all portals that are added to the active panel, go to the **Panel Utilities > Panel Portal List** menu command in Professional Authoring.

The list shows when each portal was created and by whom. The currently published portal for this panel is listed in bold, and the time when the portal was last published is also shown.

5.4.5.1.4. Managing your Portal Templates

The same Portal can be used on many different panels simultaneously. Whenever you save a portal as a template (see How to Save a Portal as a Template on page 65 for more information) the portal is stored as a general (global) portal template, which can later be added to other panels.

A list of all such global Panel Portal templates is found under the **Home > Templates > Panel Portal** menu command.

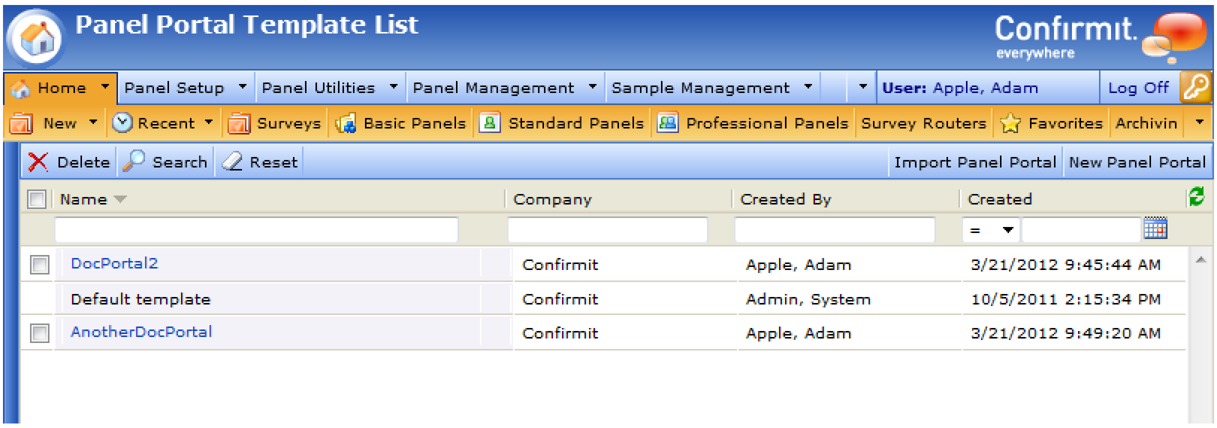


Figure 70 Example of a Panel Portal template list

When you enter a template, you can right-click on the template name and select **Permissions** from the menu. A list of all Forsta Plus users in your company is then displayed, so you can decide who in your company should have access to use this particular template.

Note: Users with the Company Administrate permission have by default access to all the company's Portal templates.

5.4.5.1.5. How to Save a Portal as a Template

To save a portal as a template for later use:

1. Whilst in the panel that has the portal that you wish to save as a template, go to the Panel Portals menu item.
2. Open the portal.
3. In the Panel Portal toolbox, right-click on the portal name (the top node in the toolbox) and choose **Save as Template**.

An identical copy of the current portal is saved as a template, and is opened in the Panel Portal Designer page. Here you can rename the template, and make changes to the copy or the original without the other being affected.

5.4.5.1.6. How to Export a Panel Portal

If you wish to make a Panel Portal available to another server, you can export it as an XML file. The file is then sent by email to a specified email address, whereupon the recipient can import it into the other server.

1. In the Panel Portal toolbox, right-click on the portal name and select **Export** from the menu.

   The Properties dialog opens.

Figure 71 The Properties dialog when exporting a portal

2. Type the recipient’s email address into the field, then click **OK**.

   The Task page is displayed, showing a progress bar, the task ID and the status. On completion, the progress bar is at 100% and an **OK** button appears. An email is sent to the specified recipient, with the compressed XML file attached. The recipient can then save and de-compress the file, then import it into the server (see How to Import a Panel Portal on page 37 for more information).

5.4.5.2. Editing your Page Masters and Portal Pages

Note: Forsta Plus is not installed on your computer locally like an application such as MS PowerPoint normally is. In addition, no plug-ins or ActiveX components need to be downloaded for you to gain full functionality. Working in Forsta Plus means working 100% in a browser window. All formatting is done using HTML and style sheets. You use HTML table or style properties to position elements on the page instead of moving them to a precise point as in for example PowerPoint.

The normal method of setting up a portal page (positioning the Visual Components) is to use HTML tables (see How to Add an HTML Table to the Page on page 55 for more information). A page can consist of one table or a combination of tables within tables. Place the various Visual Components (page elements) and images you wish to use, inside the appropriate table cell.

Alternatively, you can specify each Visual Component’s position and layout by using style settings (CSS) (see Styles on page 49 for more information).

5.4.5.2.1. Adding Rows and Columns to the Table

You can add as many rows and columns as required to an HTML table. To add rows and/or columns, right-click the cell within which you wish to add a row or column, and select **Insert Row/Column** from the drop-down menu.

5.4.5.2.2. Deleting Table Cells, Rows and Columns

To delete unwanted cells, rows and/or columns, right-click in the cell you wish to delete (or a cell in the row or column), and choose **Delete Cell/Row/Column** as appropriate.

5.4.5.2.3. Table Properties

To set the properties for the table, right-click anywhere within the table and select **Table Properties** from the drop-down menu.

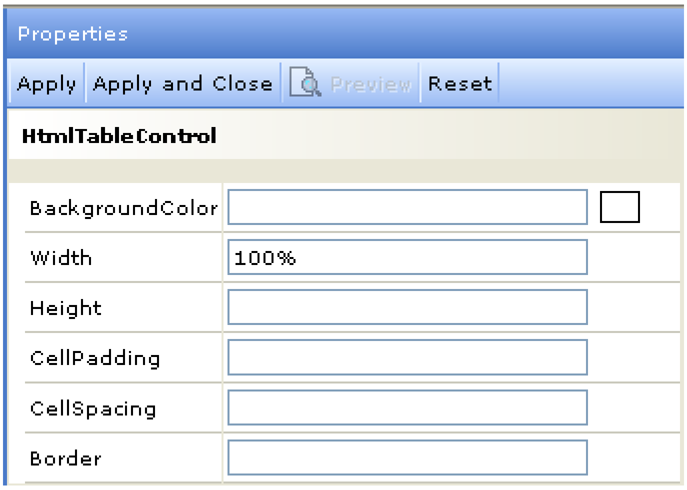


Figure 72 The Table Properties page

The Table Properties page contains properties that are applied to the entire table. Note that similar properties are also available for the individual cells in the table, and if you set cell properties, then these will take precedence over the table properties.

To set the **background color** of your table, type in the color code in the BackgroundColor text field, or double-click in the box to the right of the BackgroundColor property. A color picker chart then opens, from which you can choose a color. To activate your settings choose **Apply** or **Apply and Close**.

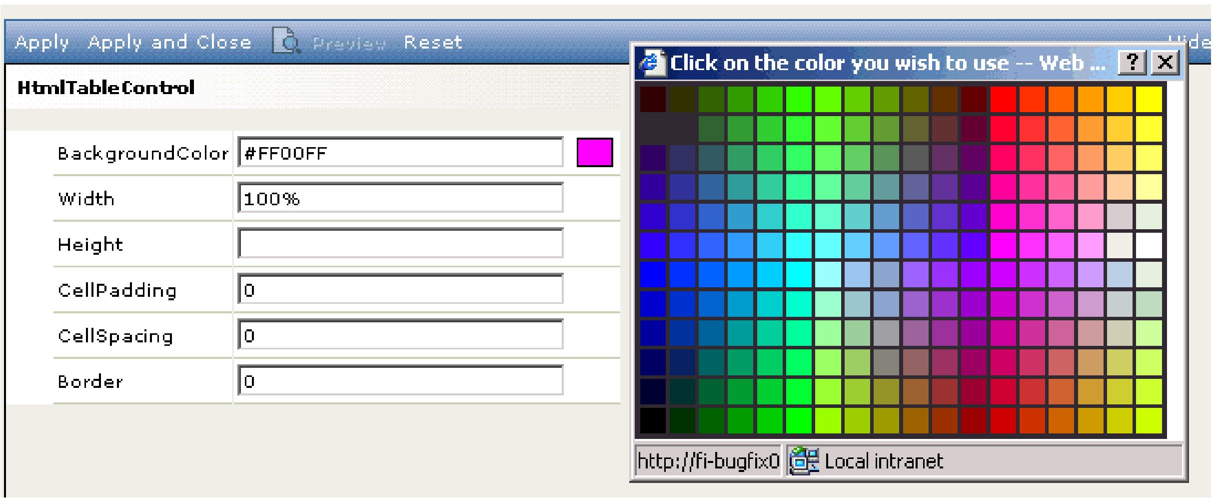


Figure 73 Editing the background color

You can also specify the **width** and **height** of your table. The dimensions can be input as either pixels or percentage of the full screen. If you wish to use screen percentage, then you must type in the % character after the value. Otherwise the setting will default to pixels.

In the table properties above, **Cell padding, Cell spacing** and **Borders** are set in pixels.

Cell Spacing specifies how far apart you want the cells to be within the table, while Cell Padding is how far from the cell walls you want the text (or other contents) inside the cell to appear.

5.4.5.2.4. Cell Properties

To edit the properties of a table cell, right-click in the cell and choose **Cell Properties** from the menu. The property list shown below will appear.

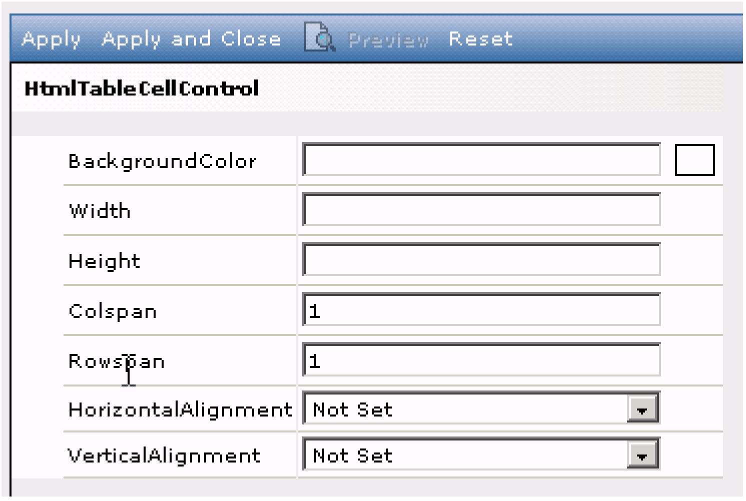


Figure 74 Cell properties

Here you can change the **background color, width** and **height**(see Table Properties on page 66 for more information). Be aware that changing these settings might influence the formatting or appearance of the other cells in the same row or column.

If you wish to stretch a cell across more than one row or column, input values in the **Colspan** and/or **Rowspan** properties to specify the number of rows/columns you want the cell to span.

The **Horizontal** and **Vertical** alignment properties define where in the cell any elements you add to that cell will be placed.

5.4.5.2.5. HTML Mode

When building your portal pages, you would normally work in WYSIWYG mode (what-you-see-is-what-you-get). Users who are familiar with HTML coding can switch to HTML mode at any time. To toggle between the modes, click the **Toggle Editor** button at the left end of the toolbar.

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

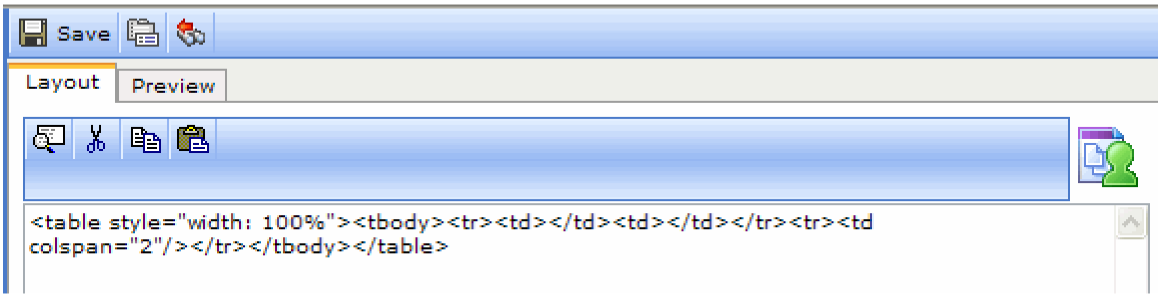


Figure 75 Example of the HTML editing mode

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

5.4.5.2.6. Free Text

You can type free text into a portal page by adding it to a table cell or directly to the page itself. You can also copy-and-paste text into the table cells. To further edit (format) your text, use the buttons in the toolbar. These are standard text-editing functions.

**Note: Common keyboard shortcuts can also be used, for example CTRL-B for bold, CTRL-U for underline, CTRL-I for italic etc. Enter inserts a paragraph break (<p></p>) and Shift-Enter inserts a line break (
). If you paste pre-formatted text into a page from other web pages or from a text editor application such as MS Word, the text will keep the formatting.**

5.4.5.2.7. Images

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

If you are in HTML mode (see HTML Mode on page 68 for more information) enter the HTML code **img tag** at the location where you want to insert the image.

If you are in WYSIWYG mode you can copy-and-paste an image onto the page. You can also drag an image from a website or browser and drop it into the required position on a page. Be aware that if the image you wish to use is a hyperlink, then you must copy and paste it into the report, not drag-and-drop it, because dragging-and-dropping an image that is a link will result in the browser trying to open the page the link points to instead of pasting in the picture. In this case the image will not be moved to the Forsta Plus site, there will just be an image tag referring to the original location of the image.

You can also right-click in a table cell and select **Insert Image**. This will open the property frame towards the right side of the screen, where you can specify source (the URL to the image), width, height, border, alt (alternative text, for use when image is not displayed), image alignment, and horizontal and vertical spacing.

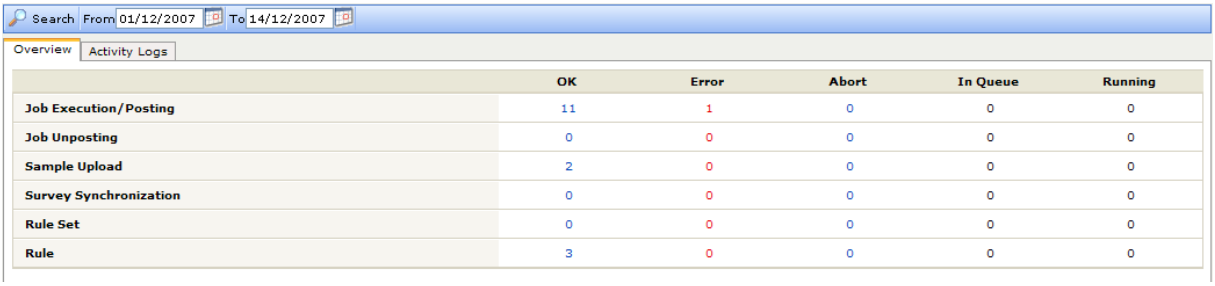
5.5. Panel Activity Log

This menu command provides access to a page that logs activity in the panel. This will be primarily activity with Panel Rules and Sampling. The page has two tabs:

- **Overview** - provides a general overview of the numbers and types of the various activities that have occurred.
- **Activity Logs** - provides details of the activities.

5.5.1. The Overview Tab

This tab provides an overview of the various activities that have occurred in the panel during a specified period.



	OK	Error	Abort	In Queue	Running
Job Execution/Posting	11	1	0	0	0
Job Unposting	0	0	0	0	0
Sample Upload	2	0	0	0	0
Survey Synchronization	0	0	0	0	0
Rule Set	0	0	0	0	0
Rule	3	0	0	0	0

Figure 76 Example of the Panel Activity Log Overview tab

The time and date when each activity occurred is logged. Use the From and To date fields to specify the time period for which you wish to view the activity (either type the dates into the fields or click the icons to open date selection calendars). Note that the From and To fields operate on both the Overview and Activity Log tabs simultaneously - any activities listed in the Overview are also listed in the Activity Log.

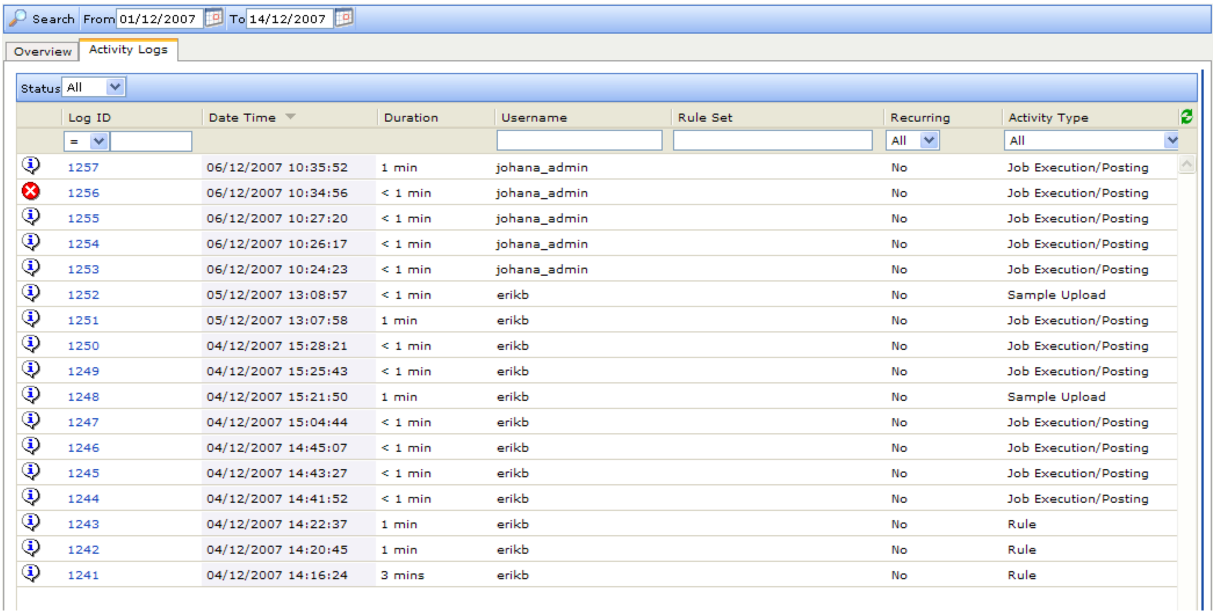
During the time period specified in the example shown in the figure above there have been a total of 17 activities. These include 12 job executions, 11 of which were successful and one of which resulted in an error, 2 sample uploads and 3 rule changes all of which were successful.

Click on the appropriate activity result link (for example in the figure above the red 1 in the Error column) to go to the Activity Log tab and view the details for that activity.

Go to the Activity Log tab to see the detail list of all the activities.

5.5.2. The Activity Logs Tab

The Activity Logs tab lists the activities that have occurred in the panel during the specified period.


Search From 01/12/2007 To 14/12/2007

Overview | Activity Logs

Status All

	Log ID	Date Time	Duration	Username	Rule Set	Recurring	Activity Type
	=					All	All
	1257	06/12/2007 10:35:52	1 min	johana_admin		No	Job Execution/Posting
	1256	06/12/2007 10:34:56	< 1 min	johana_admin		No	Job Execution/Posting
	1255	06/12/2007 10:27:20	< 1 min	johana_admin		No	Job Execution/Posting
	1254	06/12/2007 10:26:17	< 1 min	johana_admin		No	Job Execution/Posting
	1253	06/12/2007 10:24:23	< 1 min	johana_admin		No	Job Execution/Posting
	1252	05/12/2007 13:08:57	< 1 min	erikb		No	Sample Upload
	1251	05/12/2007 13:07:58	1 min	erikb		No	Job Execution/Posting
	1250	04/12/2007 15:28:21	< 1 min	erikb		No	Job Execution/Posting
	1249	04/12/2007 15:25:43	< 1 min	erikb		No	Job Execution/Posting
	1248	04/12/2007 15:21:50	1 min	erikb		No	Sample Upload
	1247	04/12/2007 15:04:44	< 1 min	erikb		No	Job Execution/Posting
	1246	04/12/2007 14:45:07	< 1 min	erikb		No	Job Execution/Posting
	1245	04/12/2007 14:43:27	< 1 min	erikb		No	Job Execution/Posting
	1244	04/12/2007 14:41:52	< 1 min	erikb		No	Job Execution/Posting
	1243	04/12/2007 14:22:37	1 min	erikb		No	Rule
	1242	04/12/2007 14:20:45	1 min	erikb		No	Rule
	1241	04/12/2007 14:16:24	3 mins	erikb		No	Rule

Figure 77 Example of the Activity Log tab

The time and date when each activity occurred is logged. Use the From and To date fields to specify the time period for which you wish to view the activity (either type the dates into the fields or click the icons to open date selection calendars). Note that the From and To fields operate on both the Overview and Activity Log tabs simultaneously - any activities listed in the Overview are also listed in the Activity Log.

In the event the list is extensive, you can search it using a number of criteria to reduce it to manageable proportions. The search criteria are as follows:

- **Status –** the status of the activity. This can be:
  - **All –** shows all activities.
  - **OK –** shows all activities that were concluded correctly.
  - **Abort –** shows only those activities that were aborted before completion.
  - **Error –** shows only those activities that were stopped due to an error.
- **Log ID –** select an operator and type in a number to, for example, show all activities after a specified Log ID number. To reset, clear the field and click Search.
- **Username –** type in the first characters of a username to show only those activities that were initiated while that user was logged on. To reset, clear the field and click Search.
- **Rule Set –** type in the first characters of a rule set to show only those activities that included that rule set.
- **Recurring –** select Yes or No to show only those activities that are recurring tasks or only those that are not recurring, respectively. Select All to reset.
- **Activity Type –** select the type of activity that you are interested in.

You can sort the list by the various columns - click on the appropriate column header, and click again to reverse the order.

Click on a blue Log ID link to open the Logging Details page for that activity.

5.5.3. The Logging Details Page

Click on a Log ID link on the Activity Logs tab to open the Logging Details page for that activity. This page gives you detailed information on the activity, as shown in the example below.

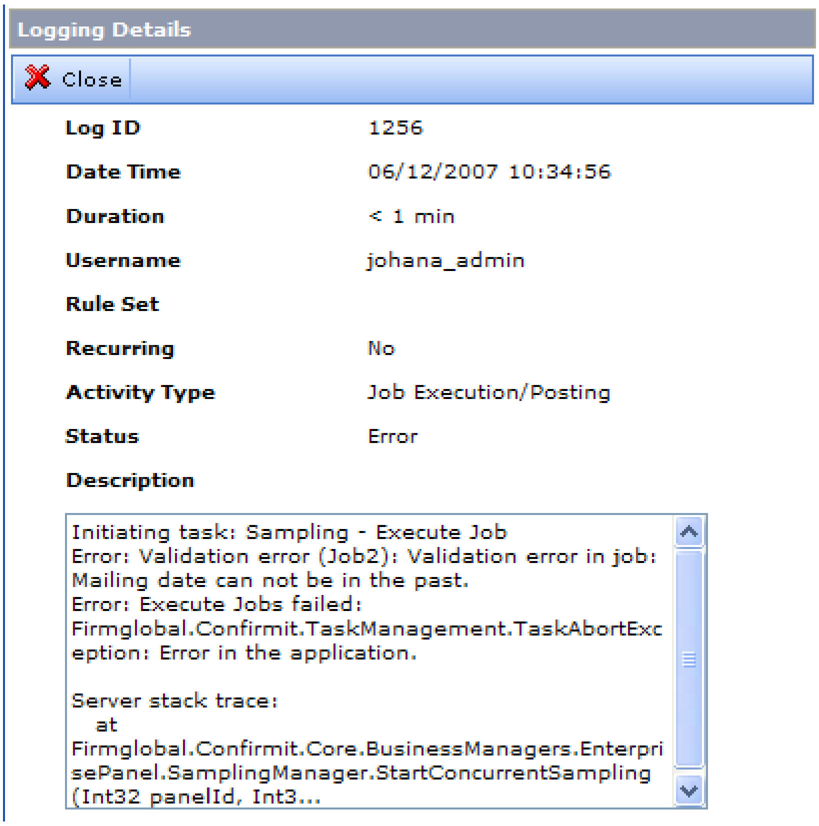


Figure 78 Example of the Logging Details page

Click on the **Close** button in the upper-left corner of the page to close the page and return to the Activity Logs tab.

5.6. Database Cleanup

When working with the database, if you delete a question (a column) and regenerate the database, the question and its data will no longer be visible or available in the database. However the data that was held in the column will not be removed from the database file in the first instance, it will merely be hidden. This is for two reasons:

- With a large database the operation to delete the data will take a considerable amount of time and resources and will have a significant impact on the server performance during the time the deletion is in progress. It is therefore more practical to “save up” a number of deletion operations and run them simultaneously, thereby only causing one disturbance in the server instead of several.
- If you should later wish to “undelete” the column, you can do this relatively easily while the data remains in the database (see How to Undelete an Object on page 14 for more information).

Note: Once you have performed a Database Cleanup, the questions and associated data will be removed permanently from the database. You cannot then “undelete”.

The Database Cleanup function completely removes deleted questions/columns, and the associated data, from the database. Once the data is deleted by the Cleanup function, if you later need that data then you must re-import it.

1. Go to the **Panel Utilities > Database Cleanup** menu command.

   The Database Cleanup page opens. This page contains a list of the questions that have been deleted from the database.

2. Check the boxes beside those questions you wish to delete permanently from the database.
3. Click **Delete Columns**.

   A confirmation box with the selected questions listed appears.

4. Click **Delete** to remove the questions and data permanently from the database.

5.7. Survey Synchronization

The Survey Synchronization function checks all surveys associated with the current panel, and updates the panel if/when there are changes. This function keeps the panel data up-to-date so samples can be selected appropriately.

For example: If a panelist is sent a survey and responds immediately, then the panel database can be updated such that the panelist is made available to be sent another survey. If on the other hand the panelist does not respond, then that person will not be available for further surveys until a predefined time after the current survey closes.

Note: The survey rule used to synchronize the database must have Survey Database (Synchronization) as the source and Panel Database as the target (see Source Type > Survey Database (Synchronization) on page 77 for more information).

Important
Surveys using batch statusing must include three “background” variables, named 'JobNumber' 'RunNumber' and 'PanelistId'. They must be added as background variables in the survey tree, and they must be included in the fields uploaded in the sample/job. JobNumber should be an open question node with a suitable field width set, while RunNumber and PanelistId must be numerical open questions with a suitable number of digits.

You can set the time interval for the synchronization function as required. Note that several rules depend on this Survey Synchronization task to be run (see How to Create a New Survey Rule Template on page 210 for more information).

1. Go to the **Panel Utilities > Survey Sync** menu command.

   The dialog shown in the figure below opens.

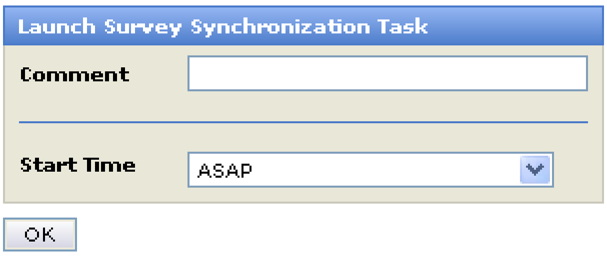


Figure 79 The Launch Survey Synchronization Task dialog

2. Type in a comment as appropriate, and select whether you wish to run the task as soon as possible or to schedule it for later execution (if you schedule for execution later, you can set up a recurring task).

3. Click **OK**.

   If you have selected to run the task as soon as possible, then the task is added to the queue. If you have selected to run the task later, then the Recurrence Pattern dialog opens (see The Sampling Jobs List on page 195 for more information).

5.7.1. Closing Surveys

If a job arrives at its specified closing date and the survey to which the job is associated can be closed, Survey Sync will close the survey automatically.

If an open survey is closed manually, Survey Sync will update the job such that it is no longer in production.

6. The Panel Management Menu

This menu contains the functionality enabling you to edit panelist details and create and edit the rules employed to select samples from the panel.

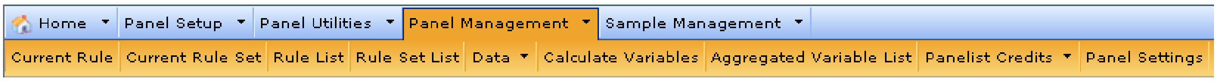


Figure 80 The Panel Management menu

6.1. Current Rule

Rules are used to change data and move/copy it from one place to another. For example you can use rules to update the database or export panelist credits.

The Current Rule page shows the details of the rule selected in the Rule List (see Rule List on page 94 for more information). When you select a rule in the Rule List, the Current Rule page opens at the General tab – see the next section.

Note: Until you have selected a rule from the Rule List during the current session, the Current Rule menu command will take you to the Rule List.

The following buttons are common for all the tabs in the page:

- **Back –** takes you back to Rule list
- **Save –** saves any changes made.
- **Duplicate –** makes a duplicate copy of the rule. Use this if you need to make a rule that will be similar to an existing rule. You can then edit the copy.
- **Execute –** once you have set up the rule and are sure it is correct, click this button to run the rule.
- **Validate Action Script –** checks the script created in the Action tab to ensure there are no errors.
- **Export Rule –** exports the rule so it can be imported into a different Panel server.

6.1.1. The General Tab

The **Rule Details > General** tab shows the details of the currently selected rule. Here you can change the rule's Name, write in a Comment, select the source and target type and set the Status. The remaining information cannot be edited.

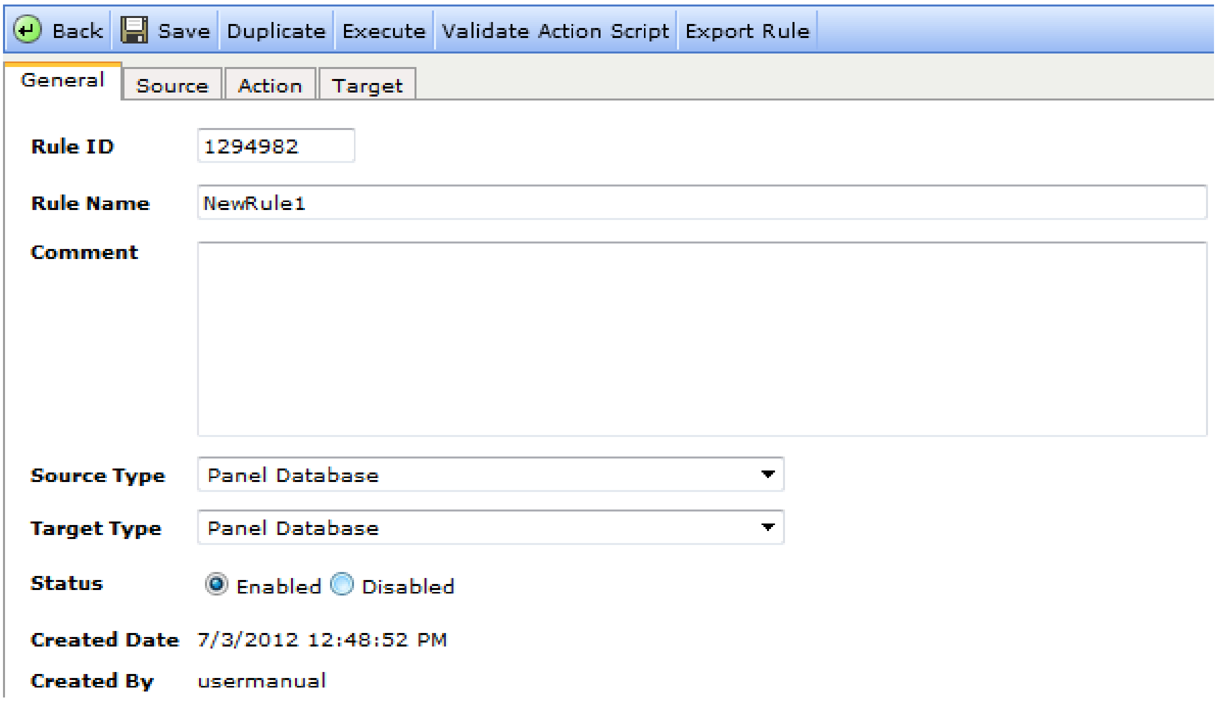


Figure 81 Example of the Rule Details > General tab

The properties and fields are as follows:

- **Source Type -** select the type of source the rule is to use. The screen layout for the Source tab depends on the type selected.
- **Target Type -** select the type of target the rule is to use. The screen layout for the Target tab depends on the type selected.
- **Status -** select the required status for the rule. The options are:
  - **Enabled –** select to allow the rule to be run “as required”. This is the default setting.
  - **Disabled –** select this option if you wish to prevent the rule from being run. This could be useful if you have a recurring task, and wish to stop using this rule in that task for a period but do not wish to change the task permanently.
- **Created Date -** the date the rule was created.
- **Created By -** the user name of the person who created the rule.

6.1.2. The Source Tab

Use this tab to specify the data source on which the rule is to operate. The data to be moved or changed can come from a number of sources – select the Source Type. The subsequent screen layout depends on the Source Type selected.

Note: A survey rule that is to be used to synchronize the panel database with a survey must have "Survey" as its source.

6.1.2.1. Source Type > Delimited Text File

Select this option if the data source is a text file. The Source tab layout is then as shown in the figure below.

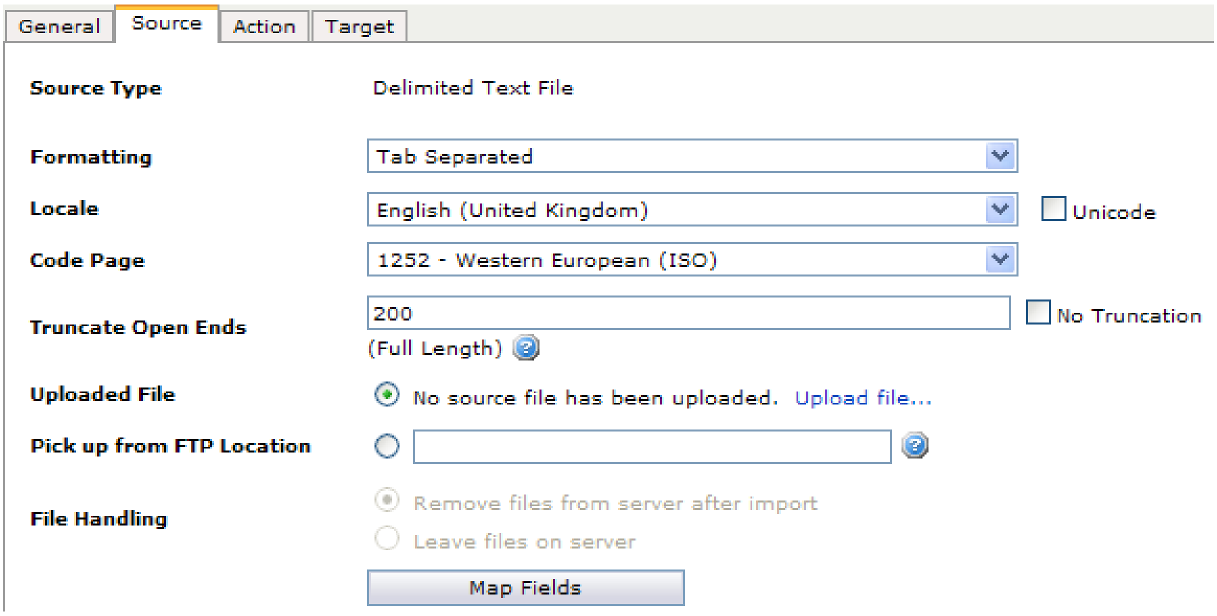


Figure 82 The Source tab with File selected as the Source Type

- **Formatting –** data is copied out as a text file. Select comma-separated or tab-separated as required.
- **Locale –** specify the area or country in which the data in the file is to be used. This will allow the system to format fields such as date fields according to local standards.
- **Unicode –** check this box if the file is saved as Unicode. The Code Page property is then disabled.
- **Code Page –** select the code used in the file.
- **Truncate Open Ends** - when exporting data to File, system performance is heavily affected by the number of "unlimited width" text fields in the exports (i.e. Open Text fields with no field width settings). Open Text fields can be truncated by using this setting (default is 200 characters). Forsta strongly recommends truncating Open Text field widths with this setting rather than choosing "Full length", as this will lead to significant improvements in processing time.
- **Uploaded File** - import files can either be uploaded directly in the browser, or placed on an FTP server and retrieved from there (see below). Select the required option.
- **Pick up from FTP Location** - if your company has licensed the FTP add-on and it has been enabled, this option will be active. You can then fetch the file to be uploaded from Forsta's FTP location. Forsta's FTP address is specified as part of the enabling procedure and cannot be changed, so you must add only the file name to this field. If you select this option, then you can also decide what to do with the original file on the FTP site; leave it there or delete it (see below). Note that fetching from FTP can allow automation of data flows, since you can set up the system to pick up files automatically
- **File Handling** - if you have selected to use the FTP option (see above), then you can decide what to do with the file on the FTP site after it is uploaded; leave it there or delete it.
- **Encrypted File** - if your company has licensed the Encryption add-on and it has been enabled, the data transfer encryption functionality makes it possible to perform secure data transfers in Forsta Plus. If the source file has been encrypted by the sender using your PGP public key, you will need to decrypt the files using your private key. Note that an administrator setting makes it possible to force every Forsta Plus user within a company to use encryption and FTP server during data transfer.
- **Map Fields** - Use this to map fields/columns with different names in source and target, from the source to the Survey Database (go to Mapping Fields for more information).

1. Make the required settings and save them.
2. In the event you wish to upload a file click **Upload File**, if you wish to pick up the file from the FTP site type the file name into the field.

   For uploaded files, a File Upload dialog opens.
3. Browse to and select the file to be uploaded, then click **OK** to load the file.

Field names in the uploaded file that are not the same as field names in the database must be mapped manually to the appropriate fields in the database. Any field names in the uploaded file that are identical to field names in the database will be mapped automatically. If any columns in the file need to be mapped manually, a message will be presented below the **Map Fields** button. If this is the case and you wish to map the fields, click **Map Fields** (see Mapping Fields on page 90 for more information).

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

Note: If you have more than one BitStream data source in a panel and use rules to update them (see Target Type > BitStream Files on page 85 for more information), then when you need to update one BitStream set it is very important that you update all of them. If this is not done, then the "not-updated" BitStream files may be inconsistent and will then produce incorrect results.

An example to illustrate the situation:

Assume that you have two separate BitStream sets, A and B, and you have a number of sampling jobs working on each. When you run a sampling job on a BitStream set, this will cause the selected panelists to be noted in a table of "dirty" panelists – these are essentially panelists who have been selected for one or more jobs without the BitStream data source being informed (the BitStream data sources cannot know that a panelist has been selected for a job until the files are updated). When a sampling job is run, dirty panelists are detected by looking in the dirty table, so any panelists currently in the table will be checked and excluded/included as appropriate. If you now update BitStream set A, the panelists involved here will no longer be dirty, so will be removed from the dirty table. However BitStream set B has not been updated yet so still does not know about the dirty panelists. As these have now been removed from the dirty table they will not be noted, and there is a very real chance that when running another job on BitStream set B, panelists who should be excluded will be selected.

6.1.2.2. Source Type > Database

Select this option if the data source is a database. The Source tab layout is then as shown in the figure below. Note that the option is only available for an On-Premise (server) installation, and is then set up in the System Configuration.

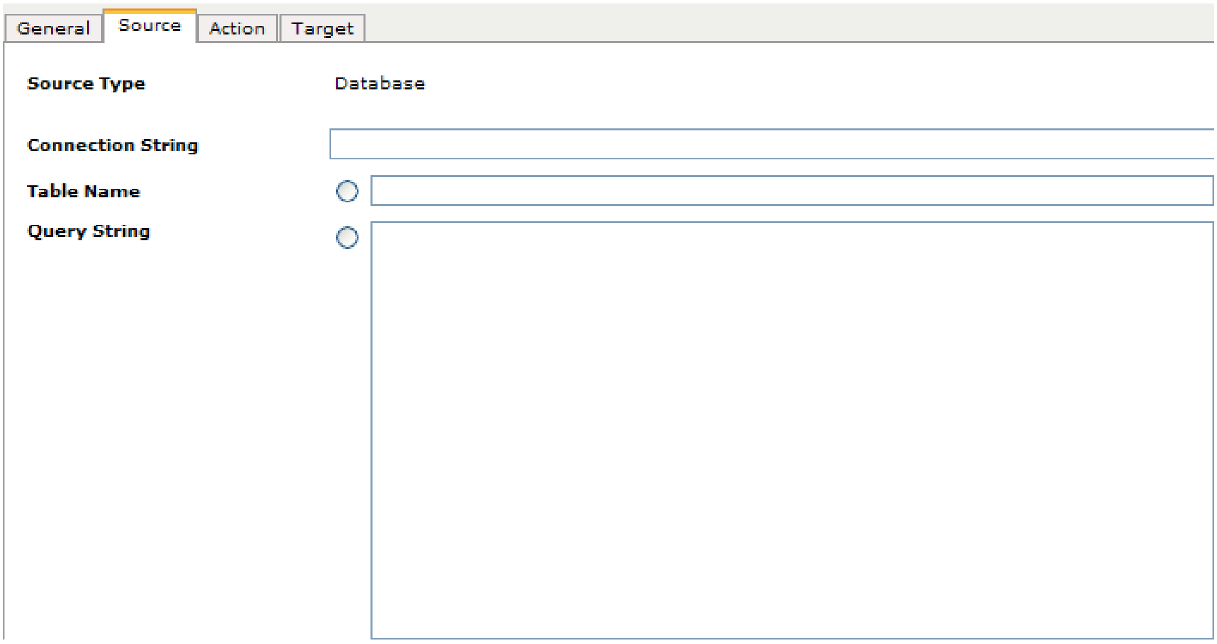


Figure 83 The Source tab with Database selected as the Source Type

- **Connection String –** the connection string used to connect to the database.
- **Table Name –** to select entire table, write in the table name. Otherwise, define a Query String if you only want part of the table. Here you must use SQL syntax.

6.1.2.3. Source Type > Panel Database

When you select Panel Database as the source type, the Source tab layout may be as shown below. Note that the fields available can also depend on the target type selected.

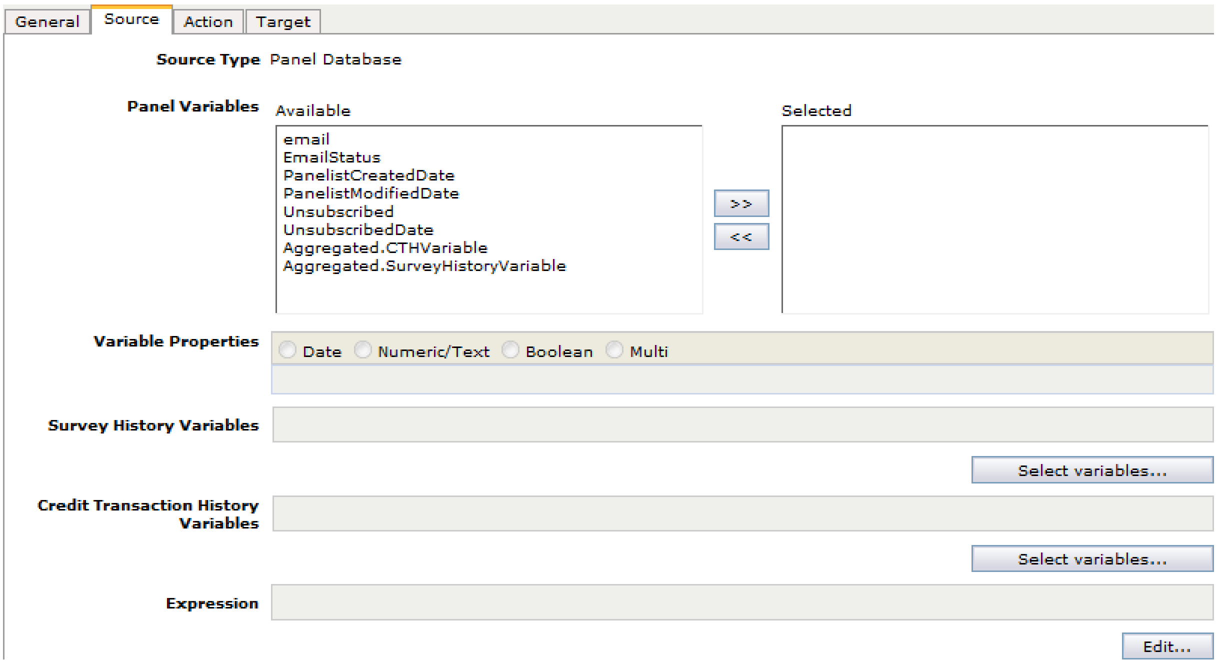


Figure 84 The Source tab with Panel Database selected as the Source Type

- **Panel Variables -** Search for and select the variables you wish to use.
- **Variable Properties -** Only available when the target is set to Delimited Text File. Select a variable in the Panel Variables > Selected field; the properties appropriate to the variable then appear in the Variable Properties field. Make the desired settings.
- **Survey History Variables –** click **Select variables...** to open a selection overlay, then select the Survey History variables you wish to use. On completion, click **OK** to close the overlay and add the variables to the field.
- **Credit Transaction History Variables –** click **Select variables...** to open a selection overlay, then select the Credit Transaction History variables you wish to use . On completion, click **OK** to close the overlay and add the variables to the field.

Note: When the Source Type is Panel Database and the Target is a File, you can format the values to be copied, for example the date format, field widths etc.

6.1.2.4. Source Type > Survey Database (Synchronization)

Important
This source type can only be used if the source survey has JobNumber, RunNumber and PanelistId as background fields in the survey. JobNumber should be an open question node with a suitable field width set, while RunNumber and PanelistId must be numerical open questions with a suitable number of digits. If you attempt to use this source type and one or more of these required fields are missing, the rule will fail. Check the survey or use 'Select columns' from within the Source tab to ensure the fields are present.

Select this option if the data source is a survey database that is to be synchronized with the panel database. The Source tab layout is then as shown in the figure below.

Note: When "Survey Synchronization" is enabled in Panel Management > Panel Settings > Features > Enable Survey Synchronization, the "Survey Database (Synchronization)" option will be available in the Source Type drop-down in the General tab **(see The General Tab on page 73 for more information).**

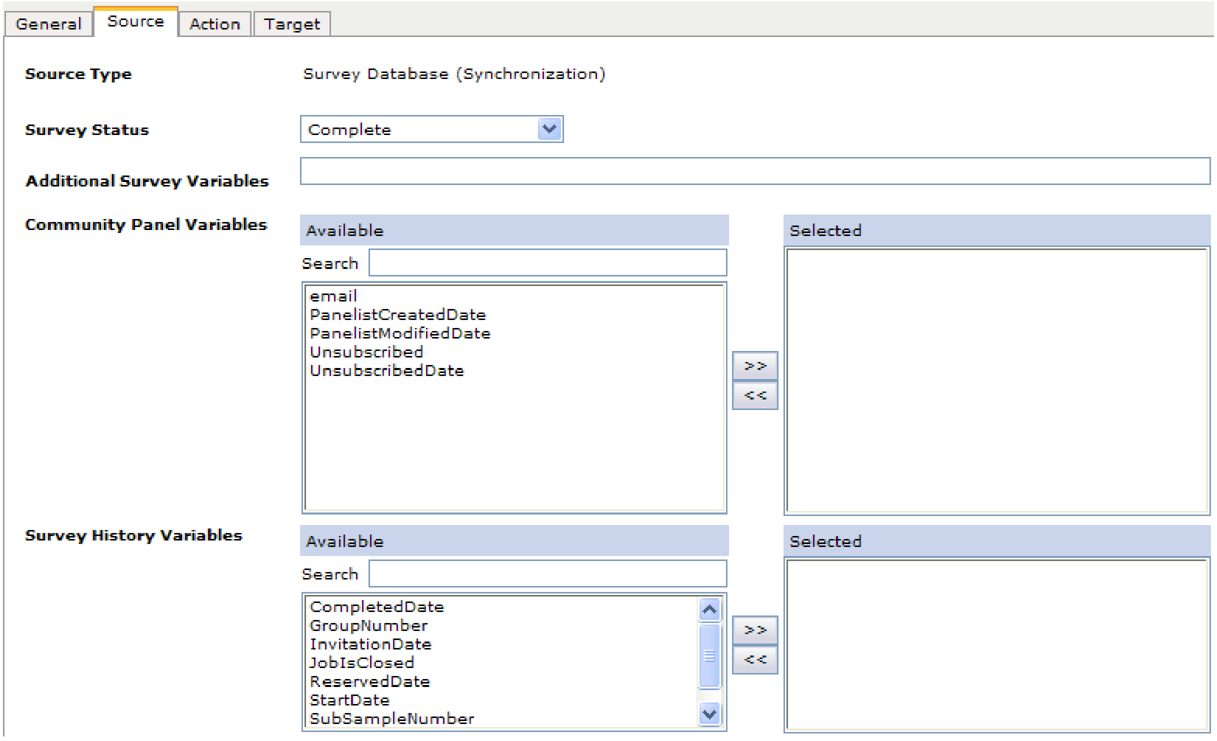


Figure 85 The Source tab with Survey selected as the Source Type

Note: A synchronization rule does not have an Execute button; the rule must be run from Panel Utilities > Survey Synchronization (see Survey Synchronization on page 72 for more information).

When you select Source Type to be Survey Database (Synchronization), on the Target tab the Target Type parameter must be set to Panel Database and the Target Mode parameter must be set to Update Data (see Target Type > Panel Database on page 86 for more information).

The survey synchronization task will run for surveys that are connected to a data synchronization rule and have the status Production. If a data synchronization rule is to be run for all surveys that are used in the sampling, go to **Sample Management > Sampling Settings > Survey Rule Templates** (see The Survey Rule Templates Tab on page 210 for more information) and set up a new template rule (see How to Create a New Survey Rule Template on page 210 for more information), and choose the data synchronization rule for Update Completes, Update Non Responder, or Survey Closing, then save your changes. Thereafter go to General and here select this rule to be the Default Survey Rule Template. Note that this will only function for sampling jobs that are executed after this setup has been created and saved.

To link a survey in to a Data Synchronization task that has already executed, go to **Sample Management > Active Jobs List** and select the rule for Update Completes, Update Non Responder, or Survey Closing as appropriate. Remember to check that the Sampling job is set to **Production**.

The fields and options on the tab are:

- **Survey Status –** select the required option. Additional fields will be activated depending on the selection. All options and fields are described below.
  - o **Complete –** selects only data from surveys with the status Complete.
  - o **Incomplete –** selects only data from surveys with the status Incomplete.
  - o **Non-starters –** selects only data from surveys that have not been started (respondent data).
  - o **All Responses** - selects all the response data.
- **Additional Survey Variables –** type in the names of the questions you wish to retrieve from the survey, separated by comma. These fields can be used in the action script. To access the field in the script, the variables must be prefixed with '**Survey.**'. I.e. If you have selected interview_start as an Additional Survey Variable, you must write **Survey.interview_start** in the script to get the value for the current panelist. Click the **Validate Action Script** button to check the script.

- **Professional Panel Variables –** fields selected here are retrieved and can then be updated. Any variables selected here will be listed in the Available Fields column on the Action tab (see The Action Tab on page 81 for more information).
- **Survey History Variables –** the fields in the Survey History table.

6.1.2.5. Source Type > BitStream Files

Select this option if the data source is to be a BitStream file. The Source tab layout is then as shown below.

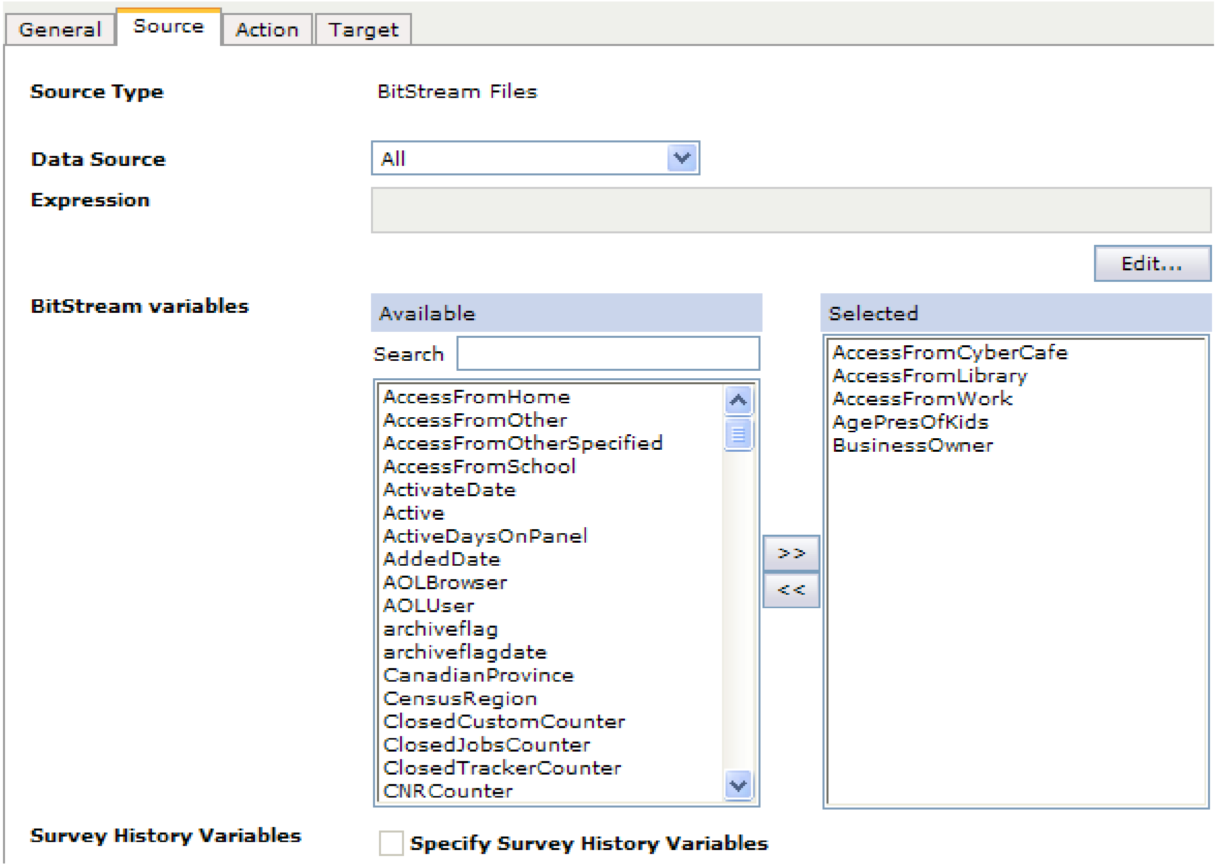


Figure 86 The Source tab with Bitstream Files selected as the Source Type

- **Datasource** - this field contains a list of the available BitStream files. Select the required file to populate the Available list.
- **Expression / Edit –** click to open an expression editor window so you can create an expression to select the data you wish to be manipulated. The functionality in this window is the same as that for the Multiple Panelist Editor. For further details (see Multiple Panelist Editor on page 106 for more information).
- **BitStream variables** - select the required variables.
- **Survey History Variables –** check this box only if exporting data if the result is to be files, or if you wish to generate BitStream files.

6.1.2.6. Source Type > Survey Database

When you select Survey Database as the source type, the Source tab layout is as shown below.

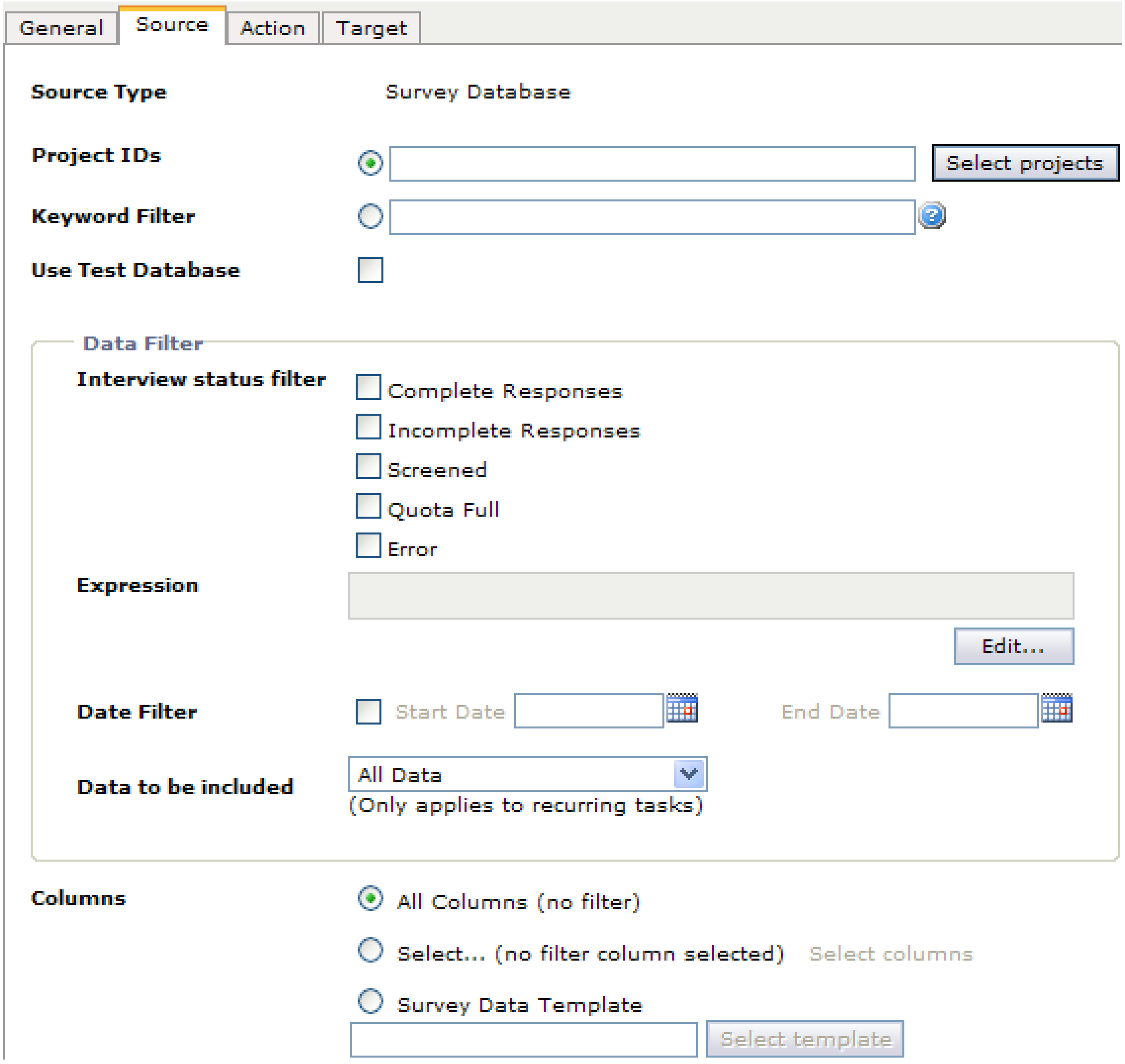


Figure 87 The Source tab with Survey Database selected as the Source Type

- **Project ID –** you can select a project either by its Project ID or by keywords. To use Project IDs, click the radio button, click **Projects**, and select the required project(s) from the list (note that you can select more than one).
- **Keyword Filter** - click the radio button and type in the required keyword. The filter will then match any survey that is assigned the particular category or keyword in the Project Overview page. Refer to the Authoring User Guide for further details.
- **Use Test Database** - check if you wish to test the rule using data from the Test database.
- **Complete responses –** selects only data from surveys with the status Complete.
- **Incomplete responses –** selects only data from surveys with the status Incomplete.
- **Screened –** selects only data from surveys with the status Screened.
- **Quota full** - selects only data from surveys with the status Quota Full.
- **Error** - selects only data from surveys with the status Error.
- **Expression -** here you can create an expression to filter the data that is to be manipulated by the rule. Click **Edit** to open the Expression Editor window. Refer to the Authoring User Guide for further details.
- **Date Filter -** if you wish to include only data from between particular dates, check the box and select the dates here.

- **Data to be included** - select All Data, which updates all data, or Data Changed Since Last Run, which updates only the data that has been changed since the previous update. Note that this setting only applies to recurring tasks. Refer to the Authoring User Guide for further details.
- **Columns** - you can select the columns you wish to include; all columns, selected, or as used in the selected template.

Go to the Target tab and click **Map Fields** to link source fields to target fields (see Mapping Fields on page 90 for more information). Key fields can also be specified. If no key fields are specified, all source fields must match the target fields by name, and the responseid and projectid on the source are used as the keys.

6.1.2.7. Source Type > Credit Transaction History

When you select Credit Transaction History as the source type, the Source tab layout is as shown.

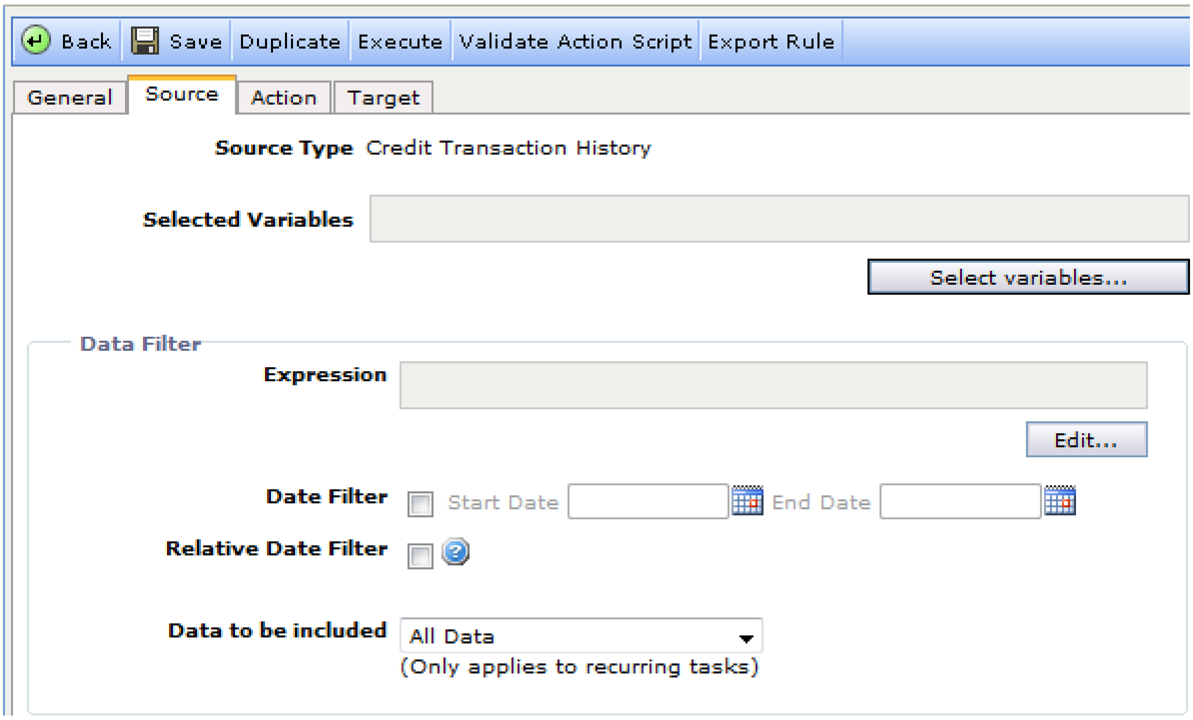


Figure 88 The Source tab when Credit Transaction History is selected as the Source Type

- **Selected variables -** Lists the variables that are selected for the rule. Click **Select Variables** to open an overlay where you can select the variables that are to be included.The available variables are those listed in the Core Fields folder in the Panel Variables toolbox.
- **Expression -** if you wish to include only a sub-set of the data in the rule, click **Edit** and create the required filter expression.
- **Date filter -** if you wish to include only data that was created within specific dates, check the box and select the desired start and end dates. Note that if the box is checked, both date fields must be filled.
- **Relative date filter -** the Relative date filter allows you to export data from time intervals specified relative to the scheduled export time. This functionality will be useful when you data exports are running as recurring tasks.
- **Data to be included -** in the event you are running a recurring task, you may wish to include only data that is new or changed since the previous time the task was run as this could reduce considerably the volume of data to be transferred. Select as appropriate.

6.1.3. The Action Tab

Use the Action tab to specify actions that are to be performed on the data. The Action tab has four sub-tabs:

- **Script** - write into this tab the actions that are to be run on the selected source records. The actions are run once for each record.

- **Global Variables** - here you must define the script properties that will be available to all the records.
- **Global Script** - any actions written in this tab are run once at the beginning of the process.
- **Post Script** - any actions written in this tab are performed once after all the other actions have been performed.

Note: You are not required to enter information into this tab. However, any scripting entered on this tab must be in JSCRIPT.NET format. Refer to MSDN.COM for further details.

Fields selected in the Source tab (see The Source Tab on page 74 for more information) are listed in the Available Fields column. These fields are available as Strongly Typed Properties in the script code.

If you wish to change data, write the required action into the Action field.

6.1.3.1. The Script Tab

Into this tab you must type in the actions that are to be run for the selected source records. Each action will be run once for each selected record.

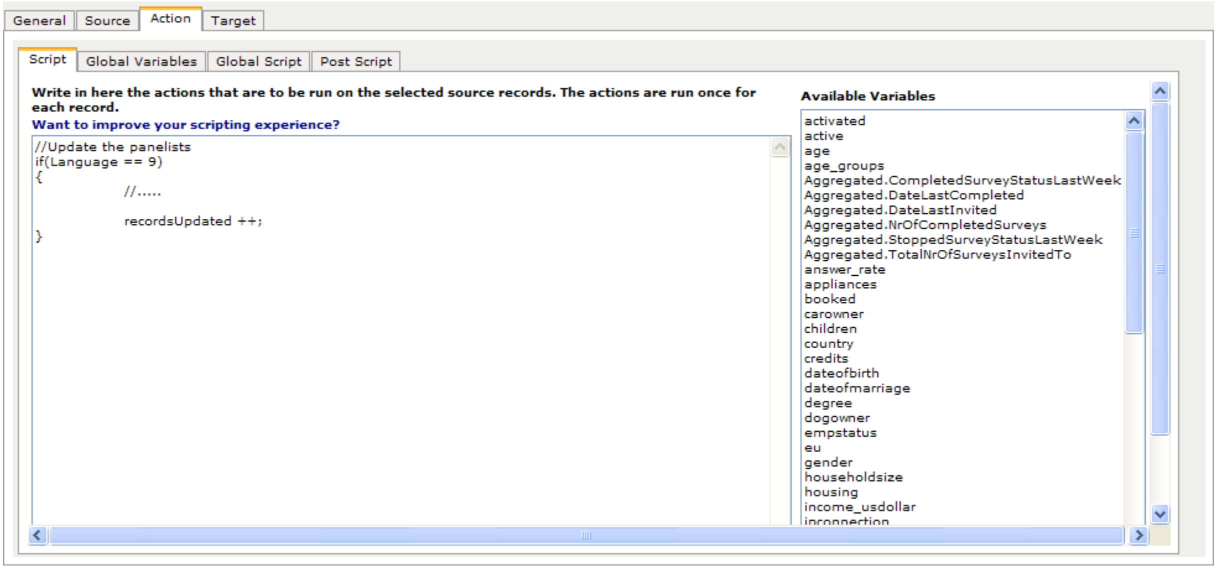


Figure 89 Example of the Script tab

Note that any variables selected in the Source tab are listed in the Available Variables column.

6.1.3.2. The Global Variables Tab

In this tab you must define any script properties that are to be available to the database records.

Figure 90 Example of the Global Variables tab

6.1.3.3. The Global Script Tab

Any actions written here are performed once at the beginning of the process. Here you could, for example, tell the system to send you an email to inform you that the scripting procedure is about to start.

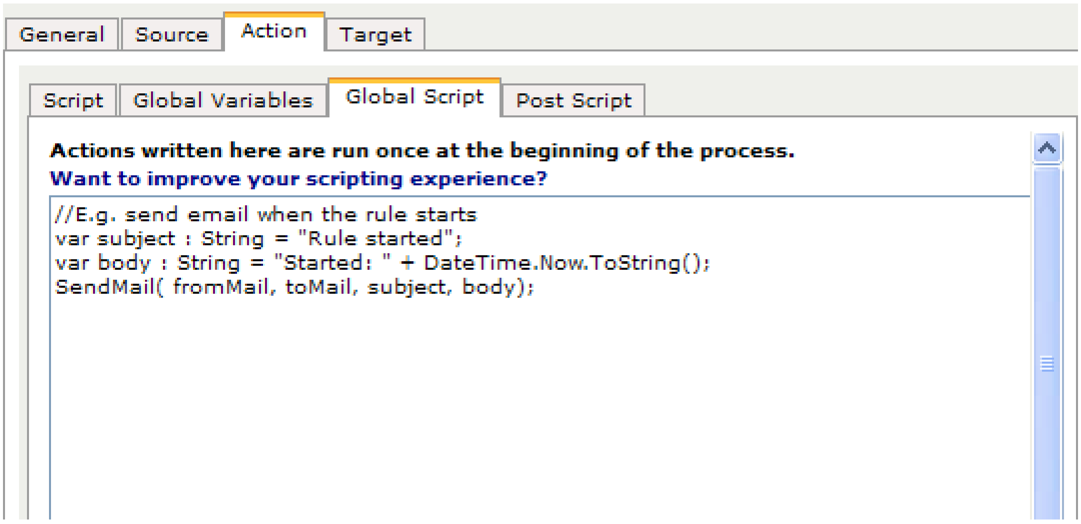


Figure 91 Example of the Global Script tab

6.1.3.4. The Post Script Tab

Write into this tab any actions that you wish to be performed once, only on completion of the other Script actions. An example here could be to tell the system to send you an email once the scripting process is complete.

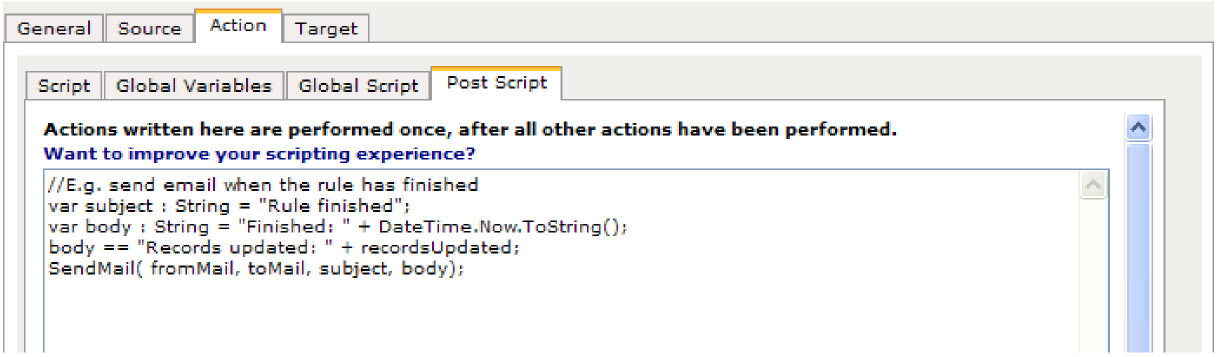


Figure 92 Example of the Post Script tab

6.1.4. The Target Tab

Use the Target tab to select the target for the data defined in the Source tab (see The Source Tab on page 74 for more information). The fields available on the Target tab depend on the Target Type that you select.

Note: A survey rule that is to be used to synchronize the panel database with a survey must have "Panel DB" as its target.

6.1.4.1. Target Type > Delimited Text File

The fields available when Delimited Text File is selected as the Target Type.

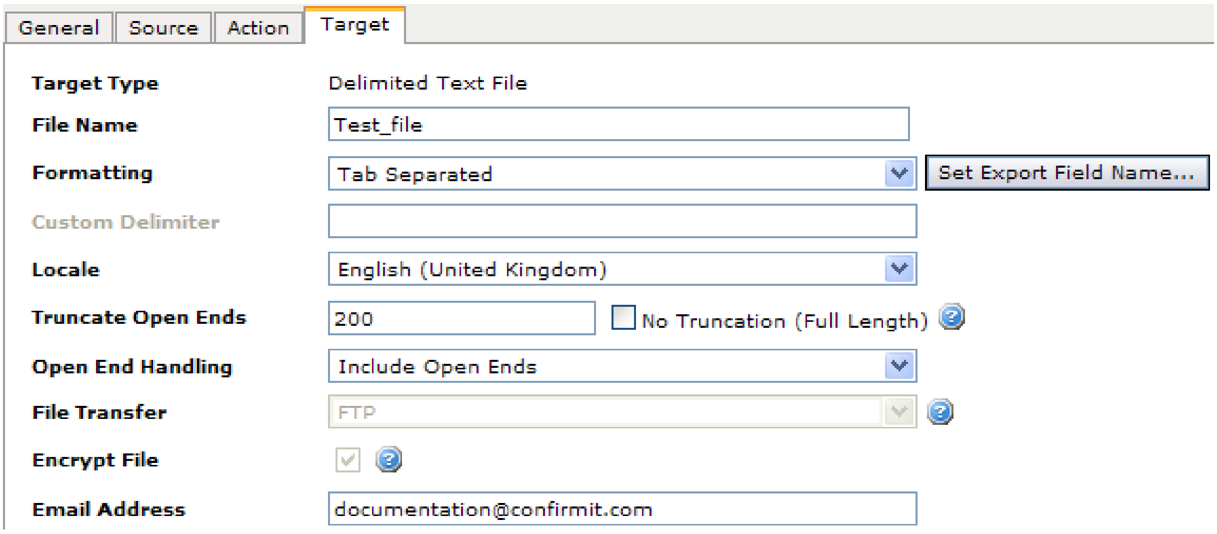


Figure 93 The tab when File is selected

- **File Name –** type in the name of the file the data is to be copied to.
- **Formatting –** the data is copied out as a text file. Select Comma Separated, Tab Separated or Custom as required.
- **Custom Delimiter** - if you have selected Custom, select the delimiter you wish to use.
- **Locale –** specify the area or country in which the data in the file is to be used. This will allow the system to format fields such as date fields according to local standards.
- **Truncate Open Ends** - when exporting data to File, system performance is heavily affected by the number of “unlimited width” text fields in the exports (i.e. Open Text fields with no field width settings). Open Text fields can be truncated by using this setting (default is 200 characters). Forsta strongly recommends truncating Open Text field widths with this setting rather than choosing “Full length”, as this will lead to significant improvements in processing time.
- **Open Ends Handling -** defines how open ended questions are handled. The options are:

- **Include Open Ends -** all open end questions are included in the export.
- **Exclude Open Ends -** no open end questions are included in the export.
- **Open Ends Only (one row per respondent) -** only open end questions are included in the export file, with one row in the file for each respondent (all the answers for each respondent are in the same row).
- **Open Ends Only (one row per answer) -** only open end questions are included in the export file, with one row in the file for each answer given.

- **File transfer** - export files can either be sent by email or placed on an FTP server. FTP may be a good option for large volumes of data, since emails with large attachments may be blocked. FTP can allow automation of data flows, since files can then be picked up automatically by another system/process. Note that FTP transfer can be enforced as a company setting, in which case the email option will not be selectable. Refer to the Administrator manual for further details.
- **Encrypt file** - if your company has licensed the Encryption add-on and it has been enabled, the data transfer encryption functionality makes it possible to perform secure data transfers in Forsta Plus. If the source file has been encrypted by the sender using your PGP public key, you will need to decrypt the files using your private key. Note that an administrator setting makes it possible to force every Forsta Plus user within a company to use encryption and FTP server during data transfer. Check the box to use file encryption.
- **Email Address –** the email address to which the file is to be sent.

Note: When the Source Type is Panel Database and the Target is a File, you can format the values to be copied, for example the date format, field widths etc.

6.1.4.2. *Target Type > Database*

The fields available when Database is selected as the Target Type.

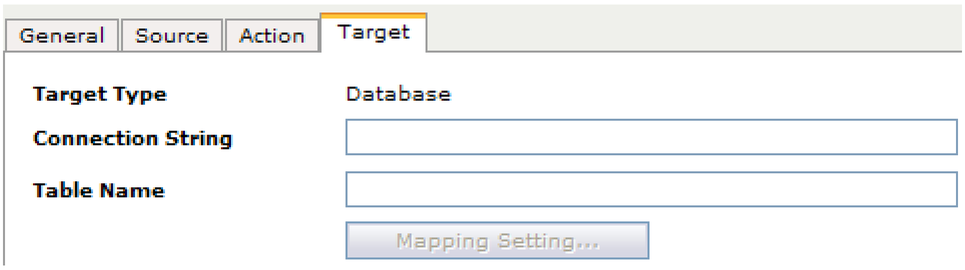


Figure 94 The tab when Database is selected

- **Connection String –** type in here the connection string used to connect to the database.
- **Table Name –** type in here the name of the table into which the data is to be copied.
- **Mapping Setting –** you can map fields from the source to the fields in the database table.

6.1.4.3. *Target Type > BitStream Files*

The fields available when BitStream Files is selected as the Target Type.

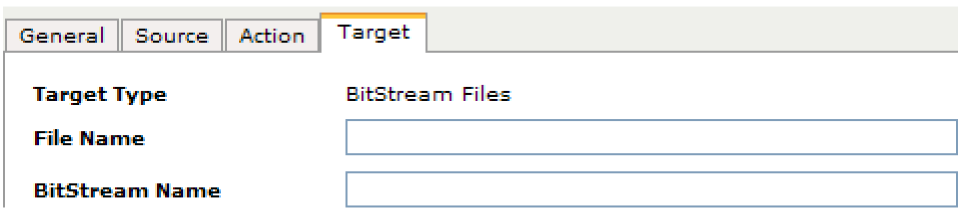


Figure 95 The tab when BitStream Files is selected

- **File Name –** type in here the name of the BitStream file into which the data is to be copied.
- **BitStream Name –** type in here the name that is to be displayed for the BitStream files

6.1.4.4. Target Type > Panel Database

The Panel Database target type is used to update the database.

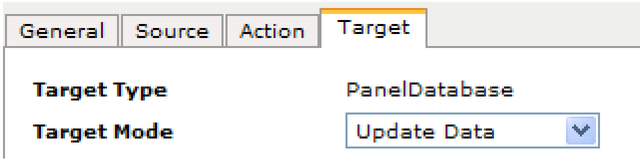


Figure 96 The tab when Panel Database is selected

Note: A survey rule that is to be used to synchronize the panel database with a survey must have "Panel Database" as its target.

- **Target Mode –** this property has different options available depending on the Source and Target selections.

  When both Source and Target are Panel Database:

  - **Update Data -** records from the source will update any matching records in the target database. The selected key field will be used to match records from the source to records in the target database. Any records in the source database that do not match the selected key fields in the target will be ignored.
  - **Delete Data -** when the Action tab contains an action script that includes the DeleteCurrentPanelist() function, selecting Delete Data will delete from the panelist database any unsubscribed panelists that are selected by the filter currently applied in the Source tab. Note that if you continue with this action, the selected panelists will be permanently removed from the database and cannot later be retrieved.

Note: Only panelists that are registered as Unsubscribed will be deleted from the database.

  When a source other than Panel Database is selected, you can choose between the four modes listed below. In all the modes the user will be asked to provide a key (see Key field below). The keys available are respid, responseid, and any field in the panel database that has an index. To create an index on a field in a panel database, go to the question properties of the field and set the "Indexed" property (available on single and open text questions with a field width set), and then re-launch the survey. By employing this setting, you can then use for example email address, membership number etc. as a key. The rule executer reads the value of the selected key field in the incoming data file and checks to see if a row with the same key already exists in the target.

  - **Update data** - use if the source is a Panel database, or if the Source is a file, and the file includes a Response ID column. Any records in the source that already exist in the target panel database will be updated with values from the source. Any records in the source that do not already exist in the target panel database will be ignored.
  - **Append data** - use if the Source is a file, and the file does not include a Response ID column. Any records in the source that do not exist in the target database will be added to the target database. Any records in the source that already exist in the target database will be ignored.
  - **Append with key -** use if the Source is a file and the file includes a Response ID column.
  - **Merge data** - all the data from the source will be added to the target panel database. Any records in the source that already exist in the target database will be updated, and any records in the source that do not currently exist in the target database will be added to the target database.

When you select Source Type to be Survey (see Source Type > Survey Database (Synchronization) on page 77 for more information), on the Target tab the Target Type must be set to Panel Database and the Target Mode must be set to Update.

When you set the Source Type to be Survey Database (see Source Type > Survey Database on page 79 for more information), the target tab includes the **Map Fields** button (see Mapping Fields on page 90 for more information).

6.1.4.5. Target Type > None

This type of "target" needs an Action script (see The Action Tab on page 81 for more information) but produces no data output. Use this option if you for example wish to test a rule, send emails, log rules etc.

6.1.4.6. Target Type > Credit Transaction History

The fields available when Credit Transaction History is selected as the Target Type.

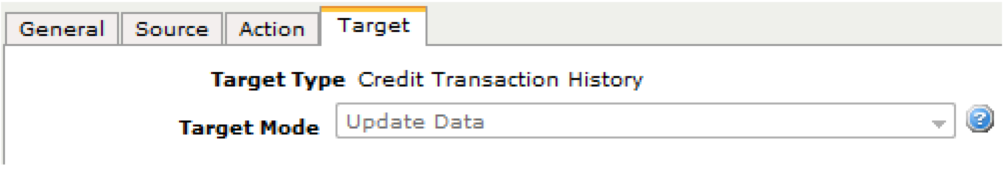


Figure 97 The tab when Credit Transaction History is selected

- **Target Mode –** specify how the source data is to be added to the database.

  You can choose between two modes for importing the data, listed below.

  - **Update Data -** use if the Source is Credit Transaction History, or if the Source is a file and the file includes a CreditTransactionHistory column. CreditTransactionHistory is the key when file is the Source. Any records in the source that already exist in the target Credit Transaction History will be updated with values from the source. Any records in the source that do not already exist in the target Credit Transaction History will be ignored.
  - **Append Data -** use if the Source is a file. The key can be selected to be either responseid or email. Any record in the Source with a panel record matching the key value will be added to the target Credit Transaction History. Any records in the Source that do not have a panel record matching the key value will be ignored.

6.1.4.7. Target Type > Excel File

This enables you to export the data as an Excel file. The fields available when Excel File is selected as the Target Type are as follows.

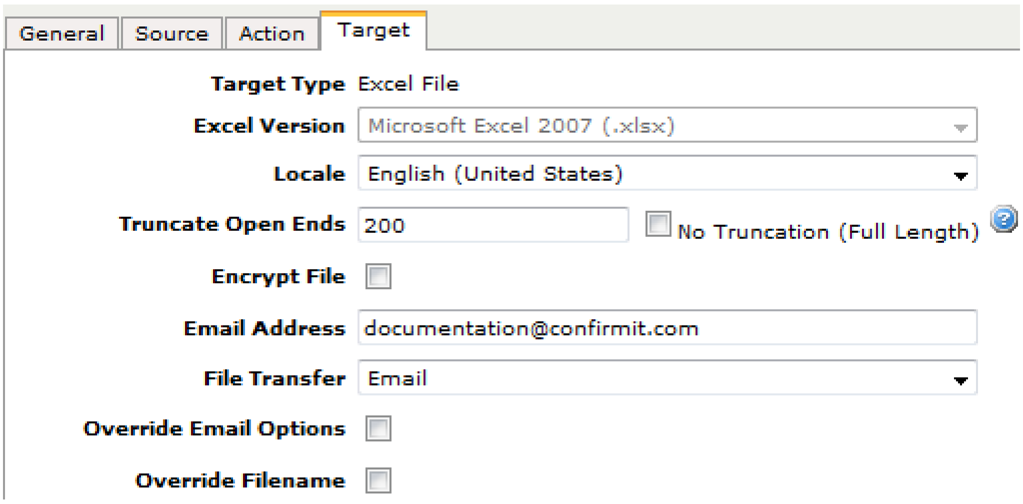


Figure 98 The tab when Excel File is selected

- **Excel version -** select the version of the Excel file to which the data is to be transferred. Microsoft Excel 97-2003 and Microsoft Excel 2007 are supported.
- **Locale –** specify the area or country in which the data in the file is to be used. This will allow the system to format fields such as date fields according to local standards.
- **Truncate Open Ends -** when exporting data to Excel, system performance is heavily affected by the number of “unlimited width” text fields in the exports (i.e. Open Text fields with no field width settings). For Open Text questions with no field width specified, you are recommended to truncate texts to improve performance. If a number of characters is specified for the Open Ends Width, any texts longer than this limit will automatically be truncated. If No Truncation (Full Length) is selected, the whole text will be imported/exported, but the task will take significantly longer to execute.

- **Encrypt file -** data transfer encryption functionality makes it possible to perform secure data exports from Forsta Plus. The encrypted files can then be either ordered by email or sent to the FTP server for downloading. The users will have to decrypt the files using their private PGP encryption keys. Note that your company must license the Data Transfer Encryption add-on for this option to be available.
- **Email Address –** if Email is selected in File Transfer, add to this field the email address to which the file is to be sent. Default is the user's (your) registered email address.
- **File transfer -** export files can either be sent by email or placed on an FTP server. FTP is the recommended option for large volumes of data, since emails with large attachments may be blocked. FTP can allow automation of data flows, since files can then be picked up automatically by another system/process. Note that your company must license the FTP add-on for this option to be available (refer to the Authoring User Guide for more information).
- **Override Email Options -** when selected, allows you to override the standard export email options and customize both the subject and the email that will be sent to the export recipient. Checking this box displays a number of additional options.
- **Override Filename -** allows you to override the system-generated name. Tick this check-box to open the file name text-box. Here you can edit the system-generated name. Note that when exporting Survey Data to the FTP server in Survey Data > Exports or Data Processing rules, the Override Filename option accepts relative paths, as for example "..\..\myftpfile_in_another_folder.txt". In this case the file will not be stored in the default folder ("ProjectsData\p123123" or "RulesData\RuleN"), but rather directly under the (Company) Download folder.

6.1.5. How to Duplicate a Rule

To save time while creating a new rule, if you have an existing rule that is similar to the one you require then you can duplicate it.

1. In the Current Panel Rule page, click **Duplicate**.

   The Duplicate Panel Rule dialog opens.

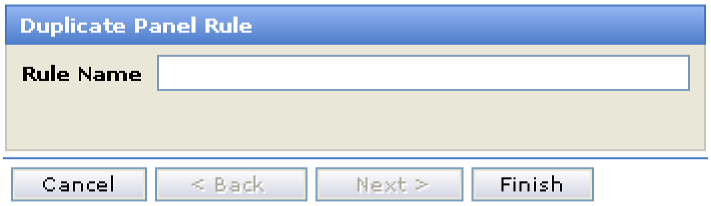


Figure 99 The Duplicate Panel Rule dialog

2. Type in a name for the new rule, then click **Finish**.

   The rule is duplicated, and will appear in the Panel Rules list. The Panel Rule Details page opens showing the new duplicate rule. You can now edit the new rule as required.

Note: To prevent two rules sharing the same BitStream set, when a rule is duplicated, the BitStream set is also duplicated and the new BitStream set is given a new name. The new name is "<original file name> - Copy".

6.1.6. How to Execute a Rule

Run the rule to perform the actions that are specified.

1. In the Current Rule page, click **Execute**.

   The rule is checked to ensure the required information is present. If it is acceptable, the Rule Execution Properties dialog opens.

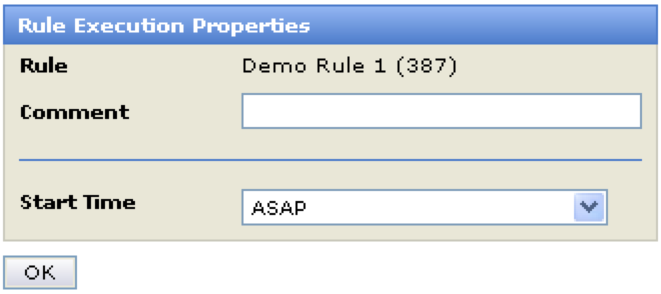


Figure 100 The Rule Execution Properties dialog

2. Type any comments into the Comment field.
3. In the Start Time field, select when you want the task to be run.
4. Select ASAP to run the job as soon as it gets to the front of the task queue in the server. Select Schedule for Later Execution if you want the job to be run at a specific time in the future or if you want the job to be repeated at regular intervals.
5. Click **OK**.

   If you have specified that the task is to run as soon as possible (ASAP) then a Task page opens showing a progress bar, the Task ID and the sequences being run and completed.

   If you have specified that the task is to be scheduled for later execution, then a Recurrence Pattern dialog opens (see The Sampling Jobs List on page 195 for more information).

   On completion, the text Task Completed is displayed at the bottom of the sequence list.
6. Click **OK** to close the Task page and return to the Panel Rule Details page.

6.1.7. Validating an Action Script

Click to check the script for compilation errors. If errors are found, they will be listed in a separate window. You must then correct the errors and validate again.

6.1.8. How to Export a Rule

You can export rules to other servers and/or panels. Proceed as follows:

1. Save the rule to ensure all changes/updates are included.
2. Click **Export Rule**.

   The Export Rule dialog opens.

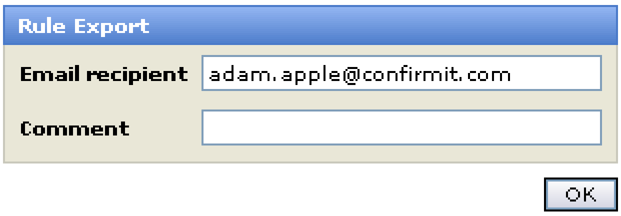


Figure 101 The Rule Export dialog

3. Edit the email address to which the rule is to be sent, and add a comment, as necessary.
4. Click **OK**.

   An email is sent to the specified address with the rule attached. This rule must now be imported into the destination server (see How to Import a Rule on page 96 for more information).

6.1.9. Mapping Fields

When uploading a .txt file from the FTP site (refer to the Authoring User Guide for further details on FTP), or when creating rules with Source Type set to Survey Database and Target Type set to Panel Database, the **Map Fields** button becomes available. This functionality allows you to map fields that have different names in the source and target.

Note: When creating rules to upload .txt files from the FTP site, if the file exists on the FTP site when the rule is created then the Map Fields button will be available. If the file does not yet exist on the FTP site then the button will not be available.

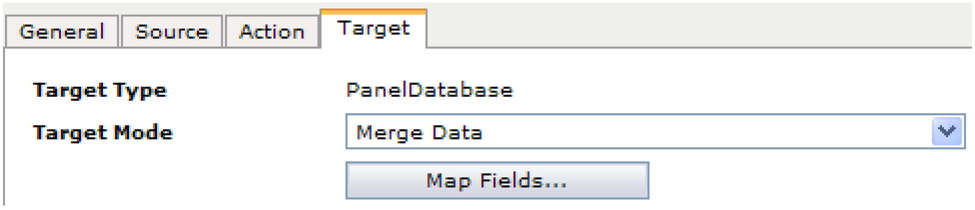


Figure 102 The Target tab with the Map Fields button

1. Click **Map Fields** to open the Field Mapping page.

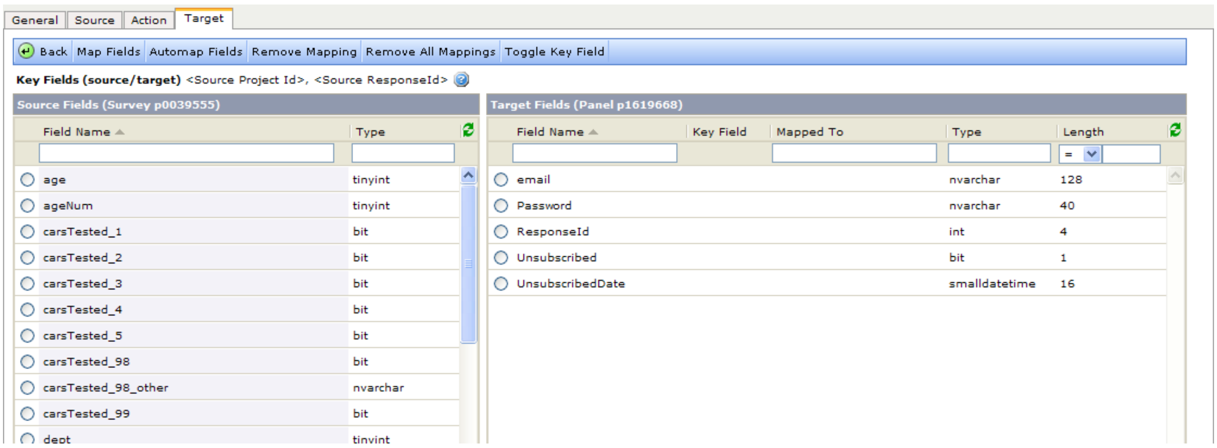


Figure 103 Example of a field mapping page

The Source Fields column lists all the fields available in the source project, and those available in the target.

2. Select the two fields (one field in each list) that you wish to map, then click **Map Fields**.

   The two fields are mapped, and the field names from the source are added to the Mapped To column in the Target Fields list. You can map as many pairs of fields as you wish, performing one mapping at a time. The figure below shows two mappings; email - name and ResponseId to responseid.

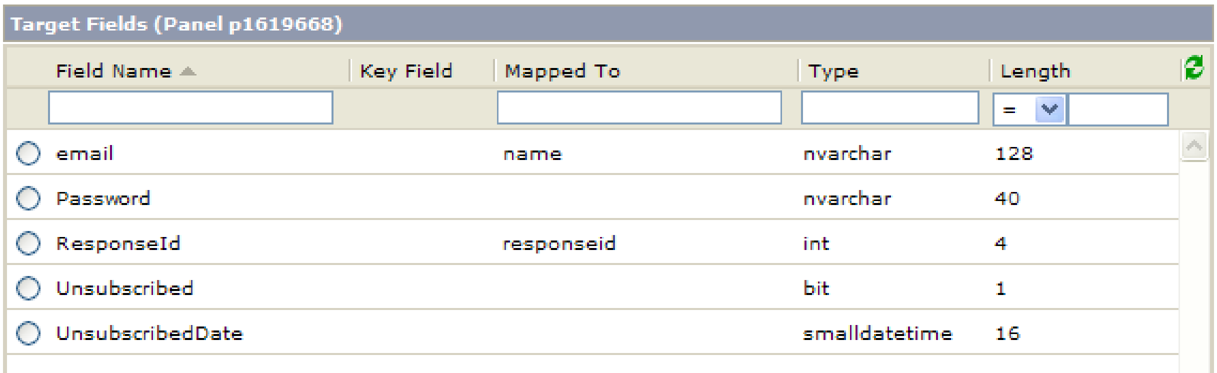


Figure 104 Two fields from the source are mapped to fields in the target

- **Key Fields -** the key field is used as a unique identifier to indicate which records are to be updated and which are to be appended. The default key fields are the source Project Id and the original ResponseId from the source. These will be stored as system fields in the target database and will be used the next time you run the same source/target combination. You can change the key fields if required. To do this, select a field in the Target Fields list and click **Toggle Key Fields**. A small key icon is displayed in the Key Field column alongside the selected field name, and the field name is also displayed in the Key Fields row towards the top of the page . Note that only fields that are indexed can be used as key fields. Refer to the Authoring User Guide for further information on indexing fields.

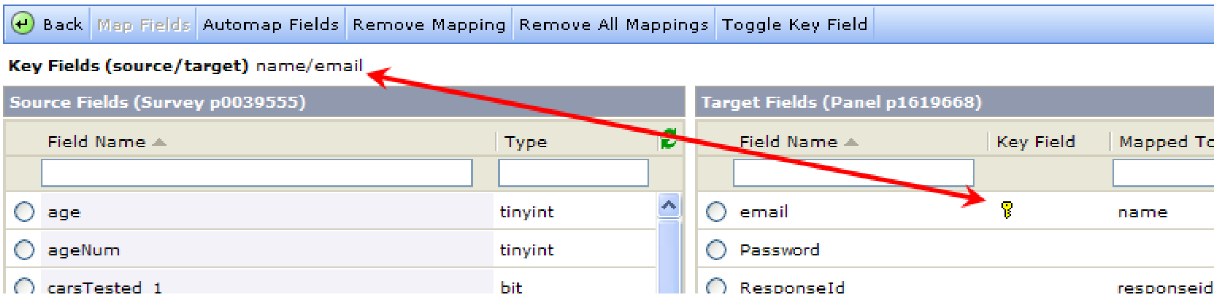


Figure 105 Toggling the key fields

- **Automap Fields -** You can perform an automatic mapping sequence. This maps all pairs of fields that have matching names in the source and the target. To run this, click the **Automap Fields** button. Note that the type of the fields is ignored during Automapping.

6.2. Current Rule Set

A Rule set is a collection of rules that are to be run as one. The rules are run in the order in which they are listed in the set. Go to the **Panel Management > Current Rule Set** menu command to open the latest rule set selected from the Rule Set List. If no rule set has been selected during the current session, then the Rule Set List will be displayed (see Rule Set List on page 97 for more information).

6.2.1. The General Tab

The Rule Set Details page opens at the General tab.

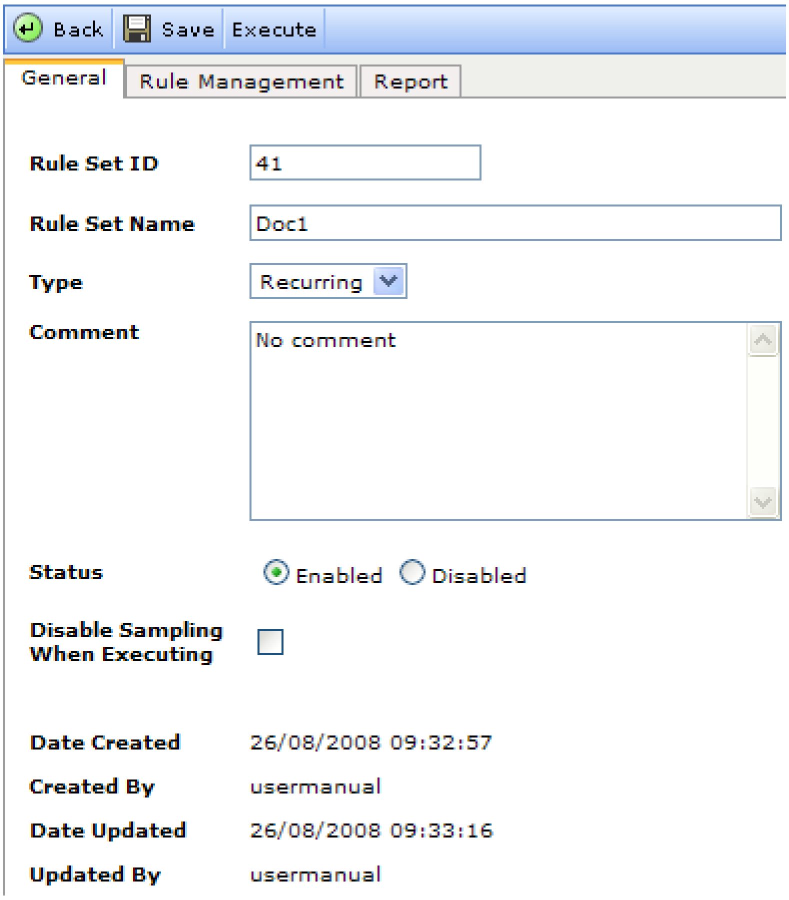


Figure 106 Example of the Rule Set Details page > General tab

- **Rule Set ID –** the identification number for the rule set. This number is generated automatically by Forsta Plus and cannot be changed.
- **Rule Set Name –** the name given to the rule set when it was created/last edited. You can change this name as required.
- **Type –** the type of rule set. The options are:
  - **Ad Hoc –** a rule set that is created for a specific use/event.
  - **Recurring –** a rule set created to perform a long-term job, that will normally recur at regular intervals.
- **Comment –** a description of the rule set, to simplify identification.
- **Status –** the status for the rule set.
  - **Enabled –**allows the rule to be run “as required”. This is the default setting.
  - **Disabled –** select this option if you wish to prevent the rule from being run. This could be useful if you have a recurring task, and wish to stop using this rule set in that task for a period but do not wish to change the task permanently.
- **Disable Sampling When Executing –** check the box to prevent sampling being performed on the database while the rule set is being run.
- **Date information –** for information only.

6.2.2. The Rule Management Tab

Use this tab to add rules to the Rule Set, and to specify what is to occur in the event Forsta Plus discovers an error whilst the rule set is running.

6.2.2.1. How to Add a Rule to the Rule Set

1. Go to the **Panel Management > Current Rule Set** menu command.

2. In the Rule Management tab, click the down-arrow beside the Rule field to open a drop-down list of the rules available.

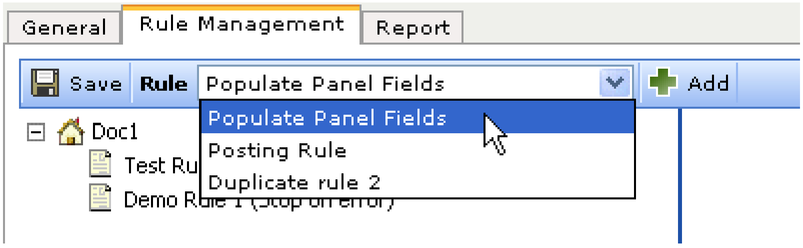


Figure 107 Selecting a rule to add to the rule set

3. Select the required rule from the list and click **Add**.

   The rule is added to the rule set. Once a rule is added to the set, it is removed from the list.

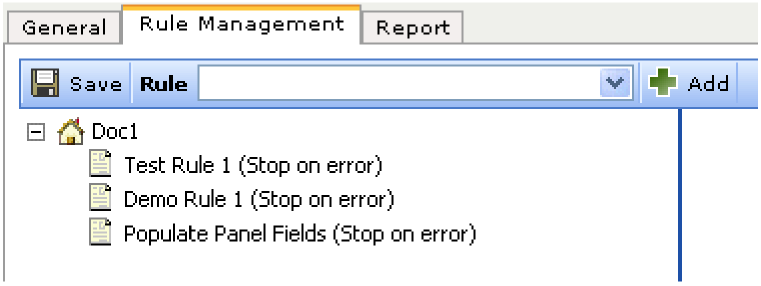


Figure 108 The rule added to the rule set

4. Double-click on the rule to open its Details pane, then make the appropriate settings.
5. On completion, click **Save** to save the changes.

You can add as many rules as required to a rule set, and you can add a rule to as many different rule sets are you wish. The rule sets to which a rule has been added will be listed in the Rule Set Name column in the Rule List (see Rule List on page 94 for more information).

6.2.2.2. Error Handling in a Rule Set List

To set up the properties for a rule in the set, double-click on the rule in the left column to open the Details page.

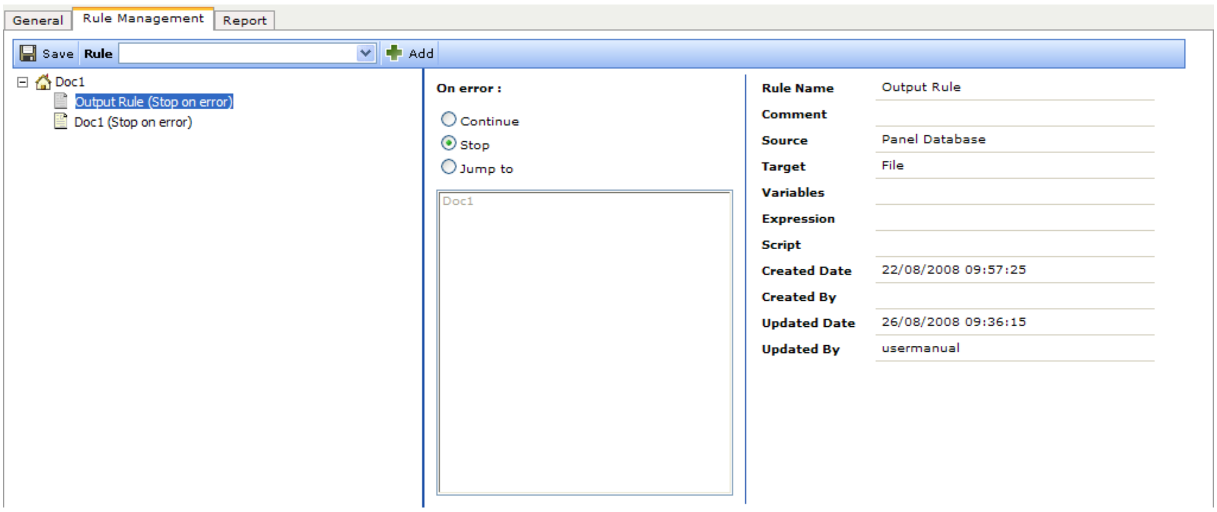


Figure 109 Example of the Rule Management tab

- **On error –** select the function you wish to occur in the event Forsta Plus discovers an error whilst the rule set is running. The options are:
  - **Continue –** select this option if you wish the rule set to continue running.
  - **Stop –** select this option if you wish the rule set to be stopped.
  - **Jump to –** select this option if you wish the current rule to be stopped and the rule set to jump to another rule. If you select this option, you must then select the rule to which the set is to jump, from the list below the “on error” options.

6.2.3. The Report Tab

This tab provides an overview of the contents of the various rules selected in the Rule Management tab.

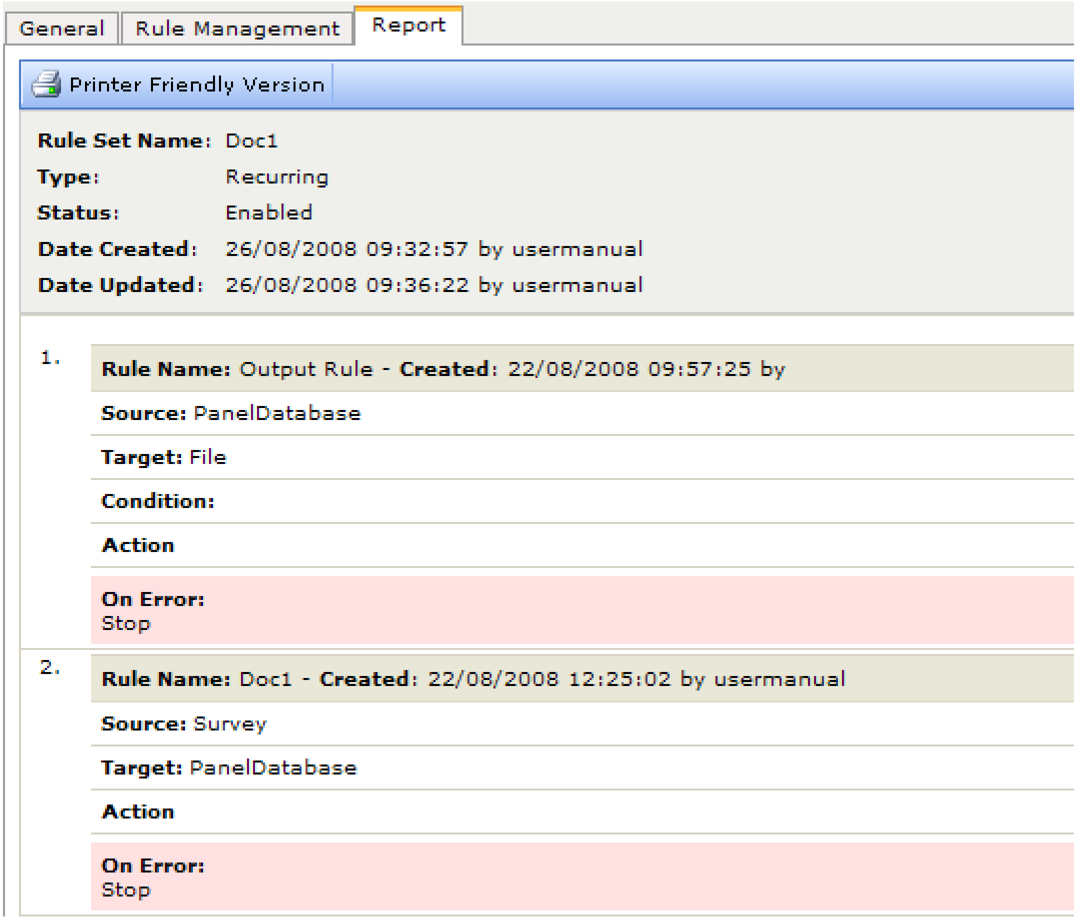


Figure 110 Example of the Report tab

Click **Printer Friendly Version** to open the report in a new window, formatted to be printed out or saved.

6.3. Rule List

Go to the **Panel Management > Rule List** menu command to display a list of all the rules in this panel. From this tab you can create new rules, and import rules from other panels.

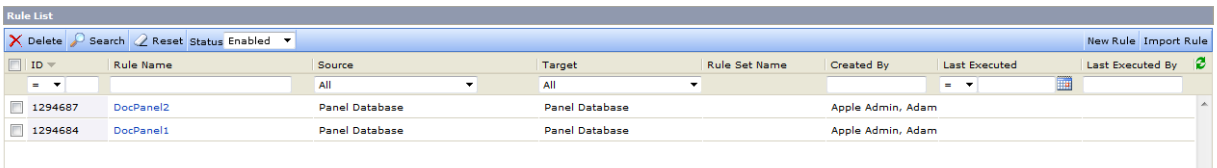


Figure 111 The Panel Rule List

Click on a Rule Name link to open the Current Rule page for that rule (see Current Rule on page 73 for more information).

In the event the Rule List is extensive, you can search for the required rule using the search criteria fields. Select or set the appropriate criteria and click the **Search** button towards the right end of the search bar. The fields are as follows:

- **ID** - the automatically-generated identification number of the rule. Select the appropriate operator and type a number into the field.
- **Rule Name** - the name of the rule, defined by the creator on the **Current Rule > General tab**.
- **Source** - the source to be used by the rule - defined by the creator on the **Current Rule > Source tab**.
- **Target** - the target to be used by the rule - defined by the creator on the **Current Rule > Target tab**.
- **Rule Set Name** - if the rule has been included in one or more Rule Sets, then the sets will be indicated here as a comma-separated list.
- **Created By** - the user name of the person who created the rule.
- **Last Executed** - the date and time of when the rule was last executed. Select the appropriate operator, then click on the Calendar icon to open a calendar and select the desired date.
- **Last Executed By** - the user name of the person who last executed the rule.

6.3.1. How to Create a New Rule

1. Click the **New Rule** Button towards the right end of the Panel Rule List toolbar.

   The Add New Panel Rule form opens at the General tab. Note that until you have named and saved the new rule, the other tabs in the form are inactive.

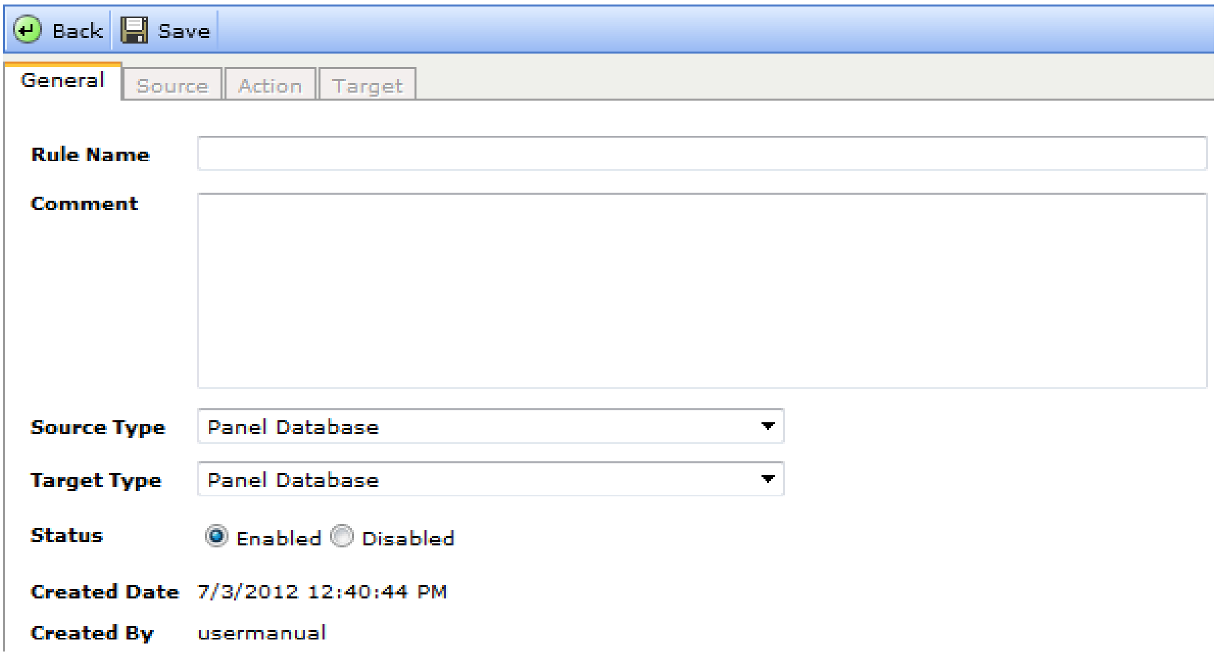


Figure 112 The Add New Rule page

2. In the Rule Name field, type in a name for your new rule.
3. Type a comment/description into the Comment field so others can see what this rule is intended for.
4. Select the type of source the rule is to use (see The Source Tab on page 74 for more information).
5. Select the type of target the rule is to use (see The Target Tab on page 84 for more information).
6. Select the status for the new rule. The options are:
   - **Enabled –** select to allow the rule to be run “as required”. This is the default setting.

- **Disabled –** select this option if you wish to prevent the rule from being run. This could be useful if you have a recurring task, and wish to stop using this rule in that task for a period but do not wish to change the task permanently.

5. On completion, click **Save**.

   The new rule is saved and will now appear in the Panel Rules list. The system allocates a Rule ID to the new rule, and this ID is displayed towards the top of the form. The form changes to the Rule Details form (see Current Rule on page 73 for more information), and the Source, Action and Target tabs become active. Go to these tabs and make the appropriate settings.

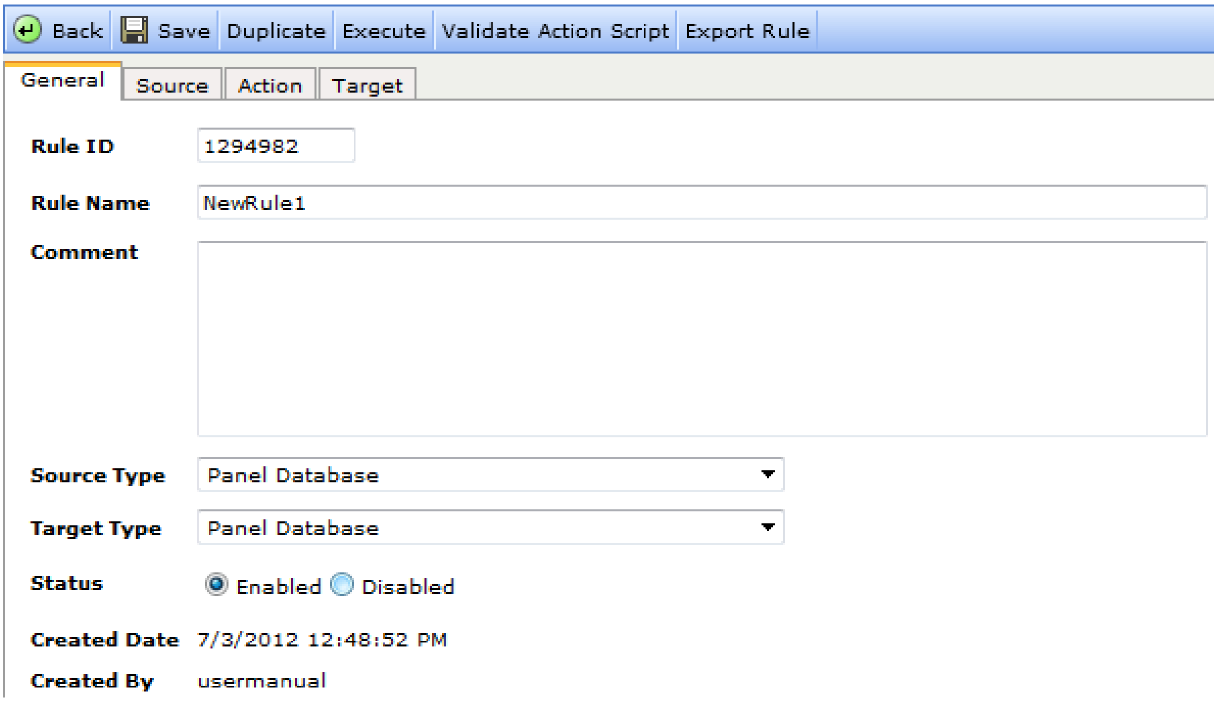


Figure 113 Example of the Panel Rule Details form

Note: A rule that creates BitStream files from the panel database must be created before sub samples can be created (see How to Create a New Sub Sample on page 144 for more information). For this rule, the Source must be Panel Database, the Target must be BitStream, and SurveyStatus must be selected in the Survey History Variables field.

6.3.2. How to Import a Rule

You can copy rules to other servers or panels by using the Rule Export / Import functionality (see How to Export a Rule on page 89 for more information). Proceed as follows to import a rule into the current Panel or server.

Note: The rule must be available as an .XML file (zipped or open) in a folder accessible from the current panel. The file will have been sent, attached to an email, from the originating server/panel.

1. Go to the **Panel Management > Rule List** menu command to open the Rule List window.
2. Click the **Import Rule** button towards the right end of the toolbar.

   The Rule Import dialog opens.

Figure 114 The Rule Import dialog

3. Browse to and select the file.
4. Type a name for the rule into the Rule Name field.
5. Click **OK**.

   The rule is imported and added to the Rule List.

Note: To prevent two rules sharing the same BitStream set, when a rule is imported, its BitStream set is also imported and the new BitStream set is renamed as "<original file name> - Copy".

6. Click on the blue **Rule Name** link to open the rule in the Current Rule window (see Current Rule on page 73 for more information).

6.4. Rule Set List

Go to the **Panel Management > Rule Set List** menu command to display a list of the rule sets available.

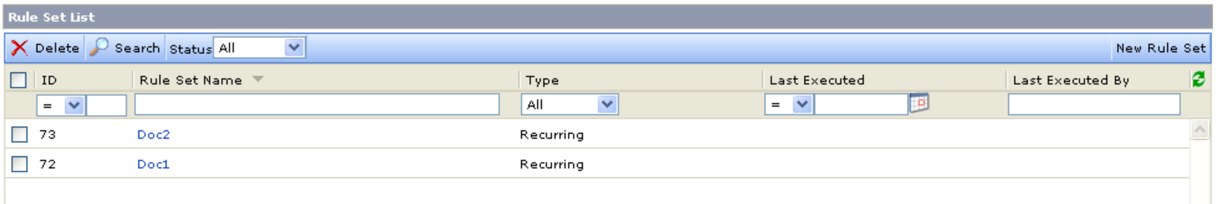


Figure 115 Example of the Rule Set List

Click on the blue **Rule Set Name** link for the desired rule set to select that rule set and open the Current Rule Set window (see Current Rule Set on page 91 for more information). In the event the list is extensive, use the search functionality to reduce the list to a manageable size.

6.4.1. How to Create a New Rule Set

1. In the Rule Set List window, click the **New Rule Set** button towards the right end of the toolbar.

   The New Rule Set dialog opens.

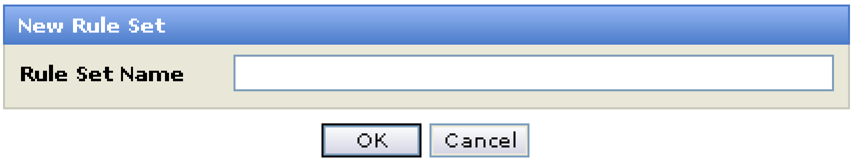


Figure 116 The New Rule Set dialog

2. Type the name of the new rule set into the field, then click **OK**.

   The rule set is added to the list.

3. Click on the blue **Rule Set Name** link for the rule set to select it and open the Current Rule Set window (see Current Rule Set on page 91 for more information). Here you set up the rule set properties and add rules.

6.5. Aggregated Variable List

When a new Professional Panel is created, a set of default Aggregated Variables will be added automatically to the Aggregated Variables list. You can also specify additional Aggregated Variables. These variables are used in aggregate queries to update the Panelist table based on information in the Survey History table. The Aggregated Variable List lists all the aggregated variables available for this user.

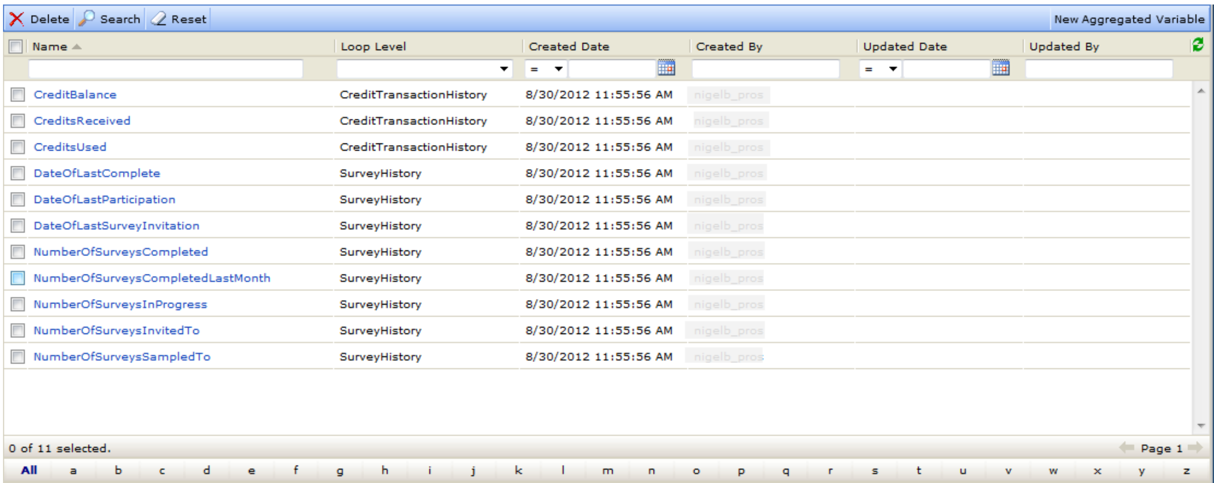


Figure 117 Example of the Aggregated Variable List

To open an Aggregated Variable, click on the blue **Name** link for that variable in the list. If the event the list is extensive, use the search functionality to reduce the list to a manageable size.

6.5.1. How to Create a New Aggregated Variable

1. Go to the **Panel Management > Aggregated Variable List** menu command.

   The Aggregated Variables window opens.

2. Click on the **New Aggregated Variable** button towards the right end of the toolbar.

   The New Aggregated Variable dialog opens.

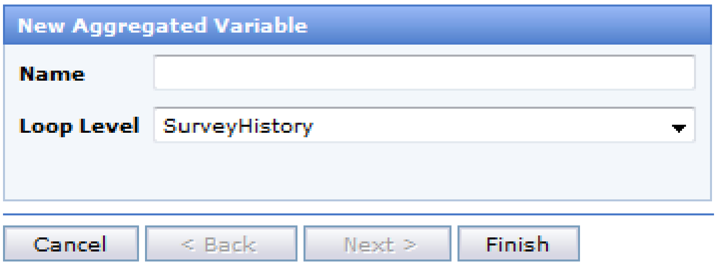


Figure 118 The New Aggregated Variable dialog

3. Type a name for the variable into the Name field.
4. Select whether you wish to use Survey History or Credit Transaction History, then click **Finish**.

   The variable is created and added to the Aggregated Variable List, and the variable opens for editing.

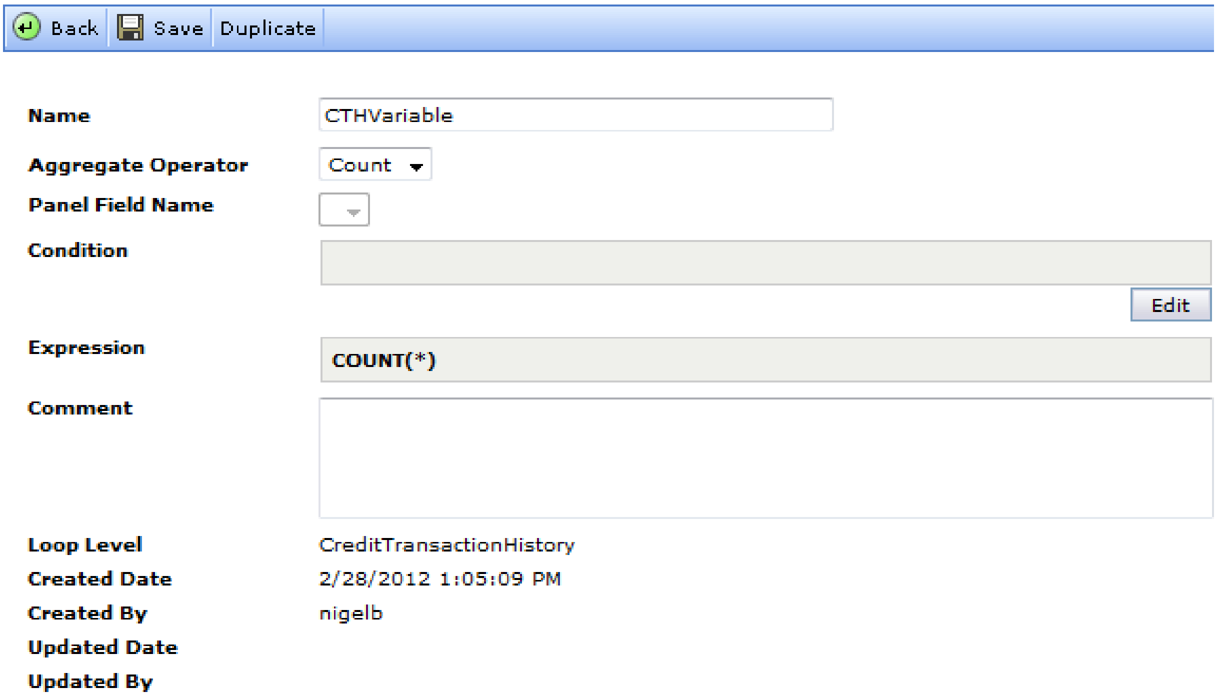


Figure 119 Example of the editing page for an Aggregated Variable

- **Name –** the name of the selected virtual variable. You can edit this as required.
- **Aggregate Operator –** select the type of operator you wish to use. Options are:
  - **Count –** counts the number of rows in the table that satisfy the condition, and outputs the result.
  - **Avg –** totals the values in the table fields that satisfy the condition, and outputs the average value.
  - **Min –** examines the values in the table fields that satisfy the condition, and outputs the minimum value.
  - **Max –** examines the values in the table fields that satisfy the condition, and outputs the maximum value.
  - **Sum –** totals the values in the table fields that satisfy the condition, and outputs the result.
- **Panel Field Name –** specify the field in the Credit Transaction or Survey History table that the condition is to be run on. Note that the fields available will depend on the Aggregate Operator selected.
- **Condition –** click **Edit** to open a condition editor window, then create the required condition (see Multiple Panelist Editor on page 106 for more information). On completion, click **Save** to copy the condition to the Expression field.
- **Expression –** the expression that will be used for the aggregated variable. This is arrived at by combining the selected Aggregate Operator and Output Field Name, and the Condition.
- **Comment –** type in a comment or description for the variable.
- **Loop Level -** indicates the loop used - for information only.
- **Date information –** for information only.

Once you have created and saved the Aggregated Variable, it will be available for use in the Professional Panel Variables field in the **Current Rule > Source** tab (see Source Type > Panel Database on page 76 for more information).

6.6. Data

The **Panel Management > Data** sub-menu contains the items enabling you to edit panelist data, export, import and create templates.

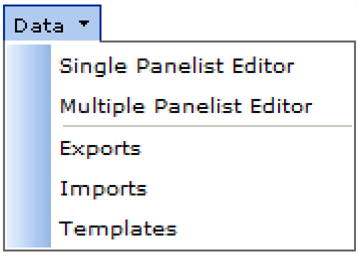


Figure 120 The Panel Management > Data menu

6.6.1. Single Panelist Editor

Go to the **Panel Management > Data > Single Panelist Editor** menu command.

This page lists the panelists registered in the database. In the upper pane, each panelist is initially presented as his/her response ID in numerical order. In this pane you can specify the data columns that are to be displayed (see Select Columns on page 101 for more information), and filter the list to focus on particular panelists. Click on the column headers to sort the list by the selected header. Enter criteria into the search fields at the top of the columns to display only those records that comply with the criteria.

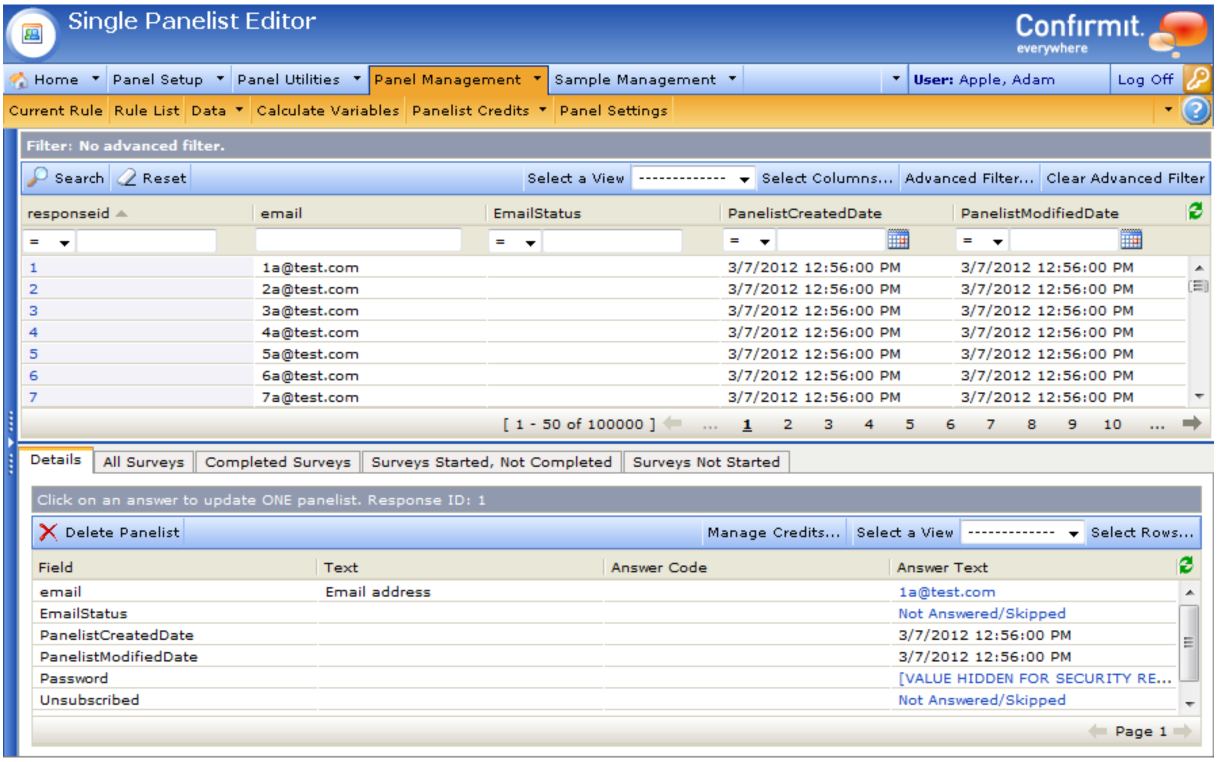


Figure 121 Example of a panelist list in the Edit window

To select a panelist for editing, click the panelist’s blue Response ID link. The selected panelist’s details are then displayed in the Details pane in the lower part of the page (see The Panelist Editor Tabs on page 102 for more information).

Note that if a panelist is locked out of the system because they have exceeded the permitted number of log-in attempts (they have entered the wrong password too many times), then an **Unlock panelist** button appears in the panelist's Details pane toolbar. Click this to unlock the panelist.

6.6.1.1. Search

The Search facility enables you to conduct a simple search through the list for the required panelist, though you must know the panelist’s Response ID.

To conduct a search for a panelist, select an operator, type the characters of the required panelist's Response ID into the data field, then click **Search**.

6.6.1.2. Select Columns

Click **Select Columns** to open a window that allows you to specify which database columns are to be displayed in the Panelist Editor window.

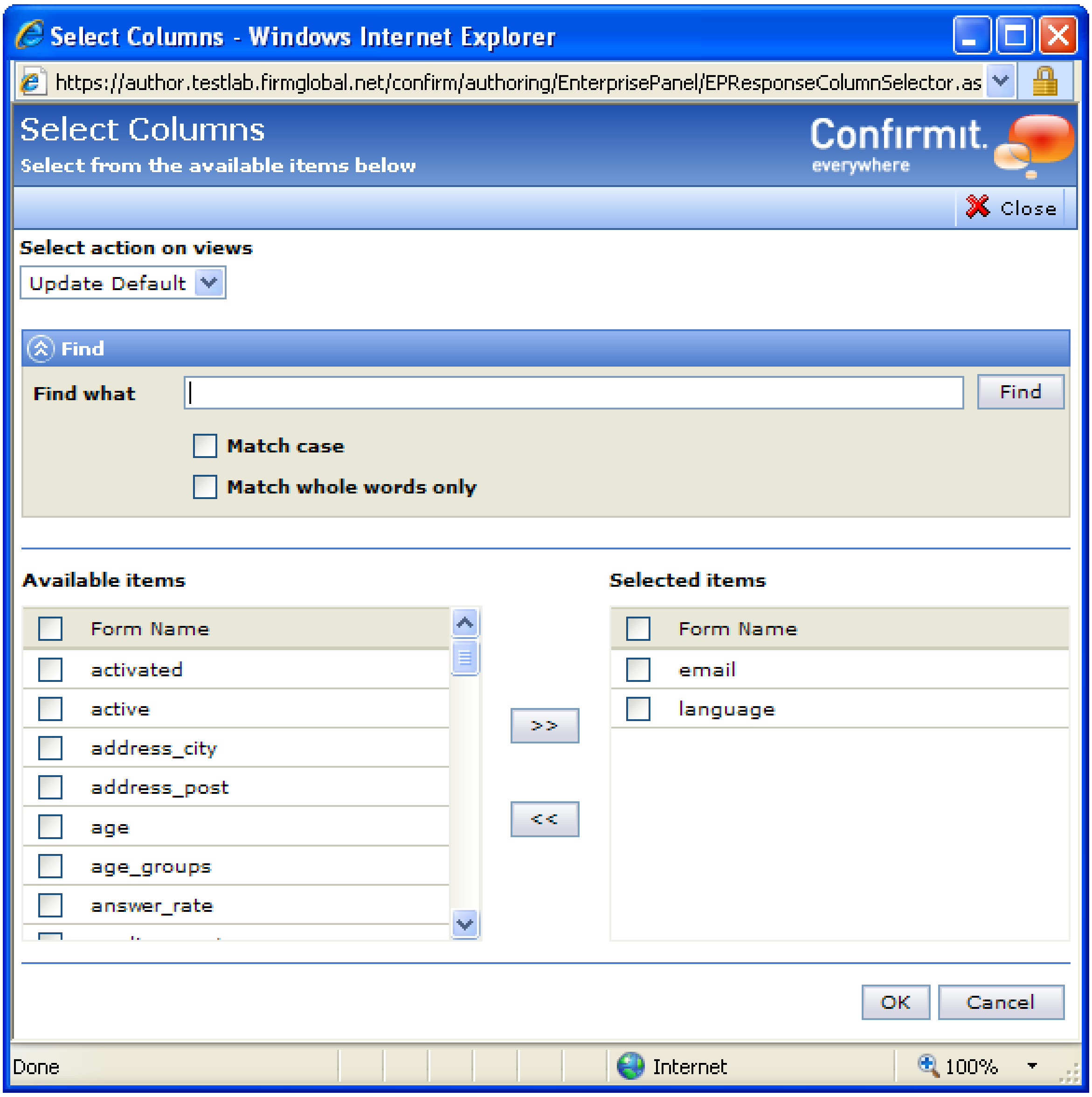


Figure 122 Example of the Select Columns window

To select columns:

1. In the Available items column, click on the data column(s) you wish to be displayed in the list, to highlight them.

Note: In the event the database contains a large number of columns, use the built-in search facility in the upper pare of the window to reduce the list to a manageable size.

2. Click the **>>** button to move the highlighted items over to the Selected Items column.
3. Click **OK**.

   The Panelist Editor window is updated automatically when you click **OK**.

6.6.1.3. Advanced Filter

Use this function to mount an advanced search for panelists, using logical expressions based on selecting a combination of specific answers provided by the panelists in the database columns.

1. Click **Advanced Filter**.

   The filter window opens. The left column will contain a list of all the database columns.

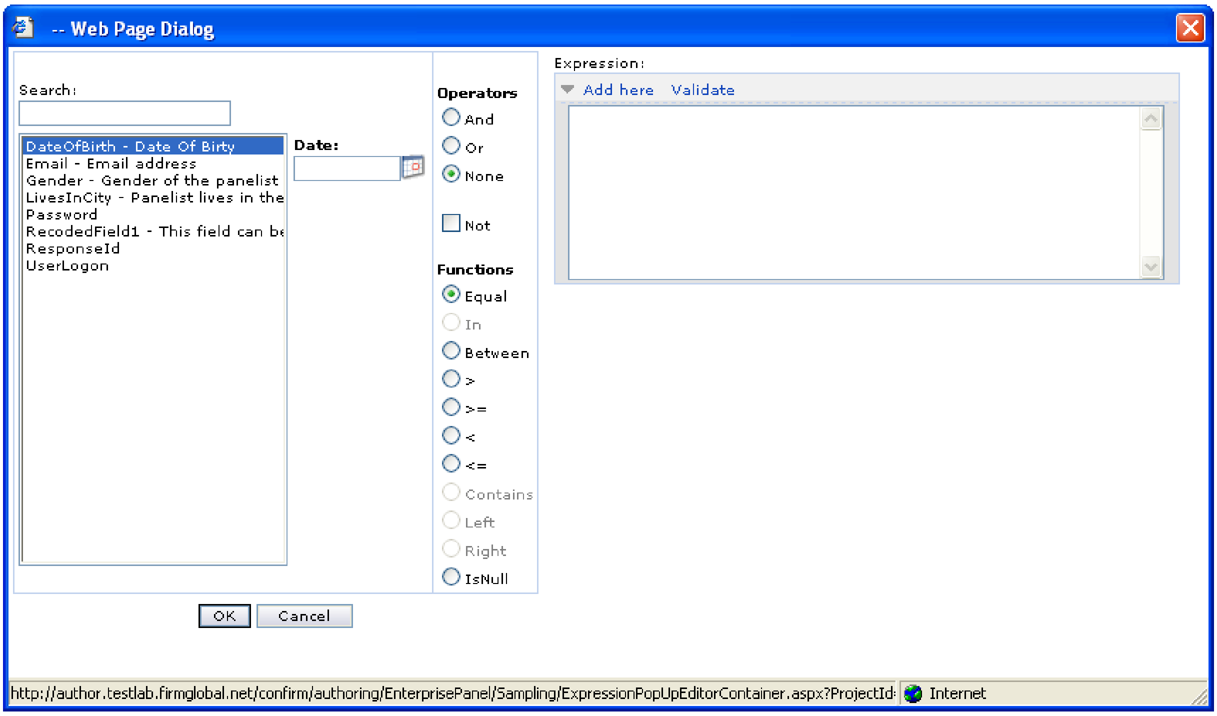


Figure 123 Example of the Advanced Filter window

2. Click on an item in the left column to select it.

   In the event the list is extensive, type characters into the Search field to reduce the list to a manageable size to enable you to find the question you are looking for. Once you have selected a question in the first column, the second column shows the possible answers for that question.

   The number/text/date field and the available operators change to suit the selected item.

3. Select or type in data as appropriate into the field.
4. Click **Add Here** to add the selected data to the expression.
5. Select the required operator, and again click **Add Here** to add it to the expression.
6. Repeat the steps until the desired expression is built.
7. On completion, click **OK** to apply the expression to the panel.
8. Click **Search**.

   The list of panelists is reduced to show only those who answer to the expression.

You can now more easily find the panelists you need to edit the details for.

6.6.1.4. Clear Advanced Filter

Click this button to clear the expression from the advanced filter and reset the list of panelists.

6.6.1.5. The Panelist Editor Tabs

These tabs display the information relevant to the selected panelist.

6.6.1.5.1. The Details Tab

This tab shows the details of the selected panelist.

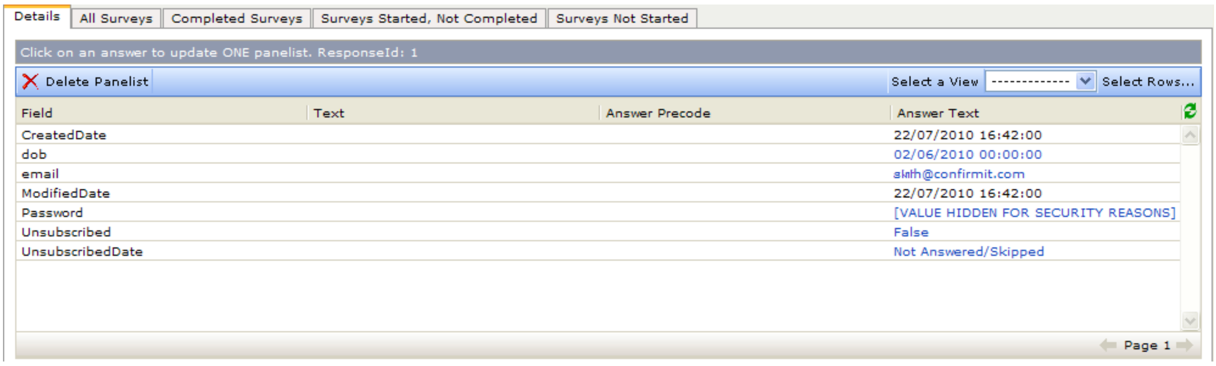


Figure 124 Example of the Details tab for a selected panelist

Click the **Select Rows** button located towards the right end of the lower pane's toolbar if you wish to display only a selection of the rows listed in the lower pane (see Select Rows on page 105 for more information).

The Created Date and Modified Date rows cannot be edited. These are set automatically by the system when the panelist record is initially created and when/if the record is later edited, respectively. Both these fields can be used when sampling, searching, in rules etc.

To edit the remaining details, click on the appropriate link in the Answer Text column. A separate Editing window opens. Here you can type in the new details. On completion, click **OK** to save the changes and close the window.

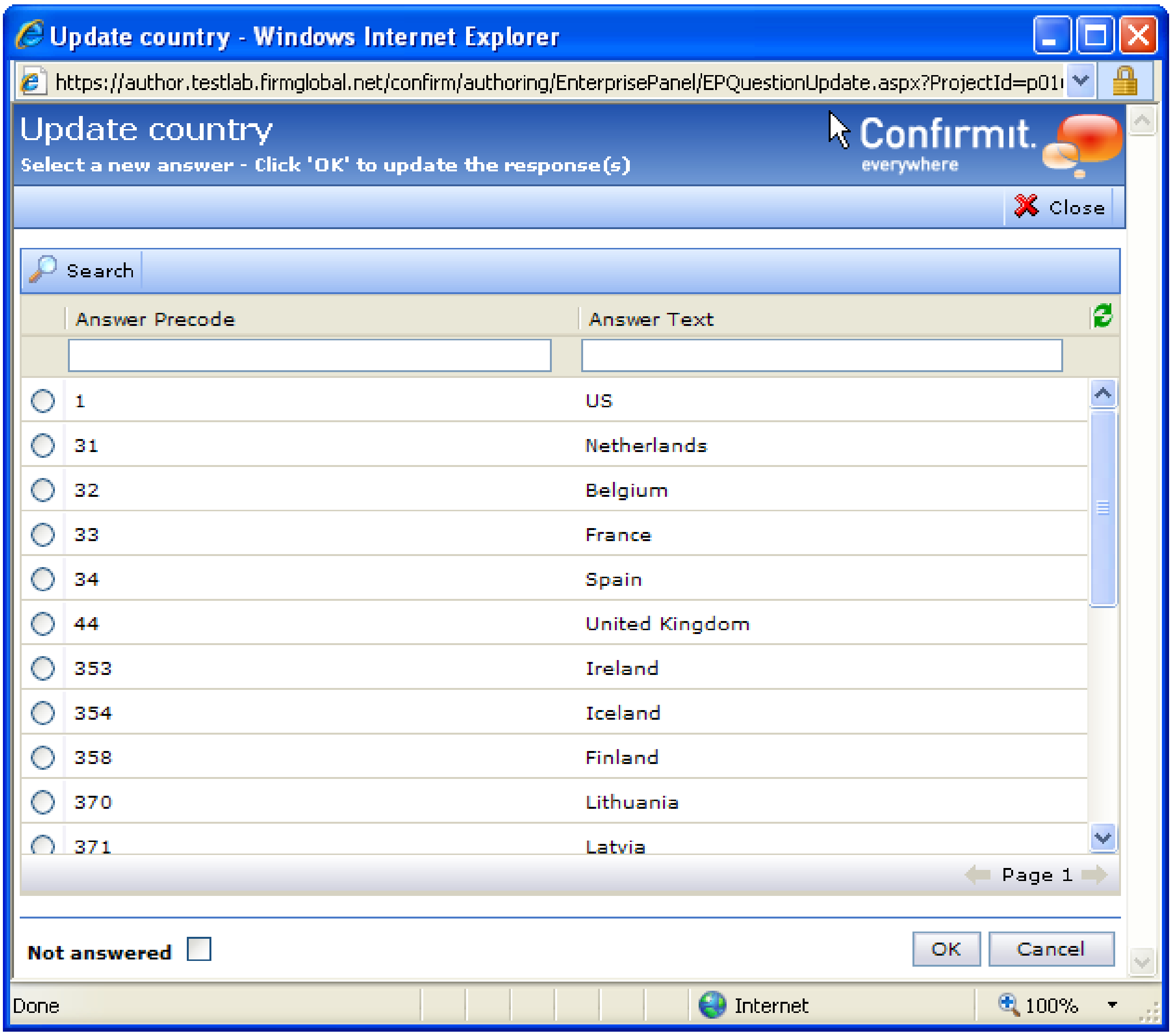


Figure 125 Example of a panelist details editing window

6.6.1.5.2. The All Surveys Tab

This tab lists all the surveys the selected panelist has been involved with. This list is basically a combination of the lists in the remaining tabs in this area of the window. Note that this list also includes closed and/or deleted surveys, and surveys where the panelist has the status "Reserved".

6.6.1.5.3. The Completed Surveys Tab

This tab lists all the surveys the selected panelist has completed. Note that this list also includes closed and/or deleted surveys, and surveys with the status "quota full" or "screened".

6.6.1.5.4. The Surveys Started Not Completed Tab

This tab lists all the surveys the selected panelist has started but not yet completed. Surveys with the status "quota full" or "screened" are not included here; these are included in the Completed Surveys list.

Note that this list also includes closed and/or deleted surveys.

Links to the surveys are provided. Click the link to open a new window with the URL to the survey, as shown in the example below. If you wish to view the survey, copy the URL into your browser.

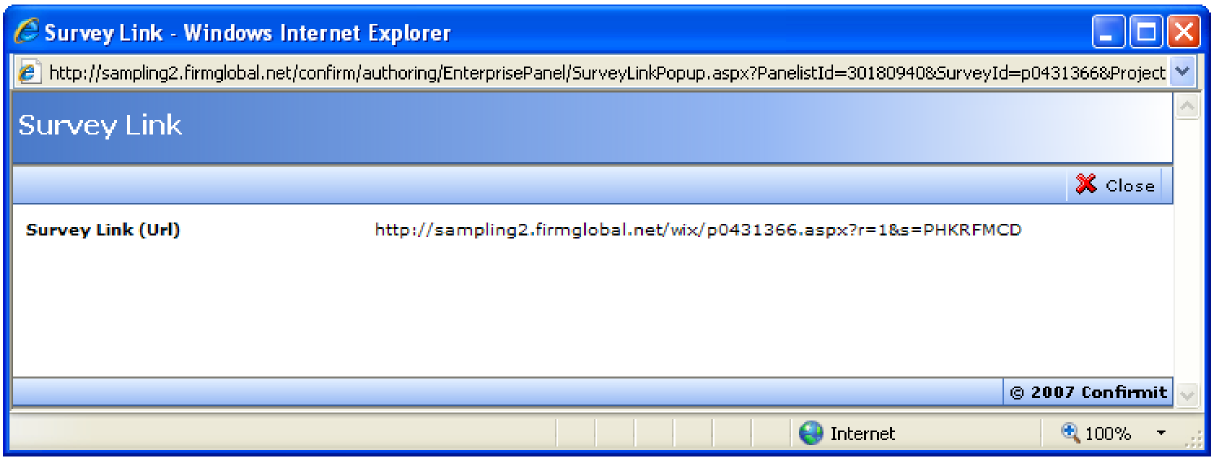


Figure 126 Example of the Survey Link window

6.6.1.5.5. The Surveys Not Started Tab

This tab lists all the surveys the selected panelist has been sent but has not yet started. A link to the survey is provided. Note that this list also includes closed and/or deleted surveys.

6.6.1.6. Manage Credits

Click the **Manage Credits** button, located towards the right end of the details tab in the lower pane's toolbar, to open an overlay that allows you to edit the credit transactions for the selected panelist.

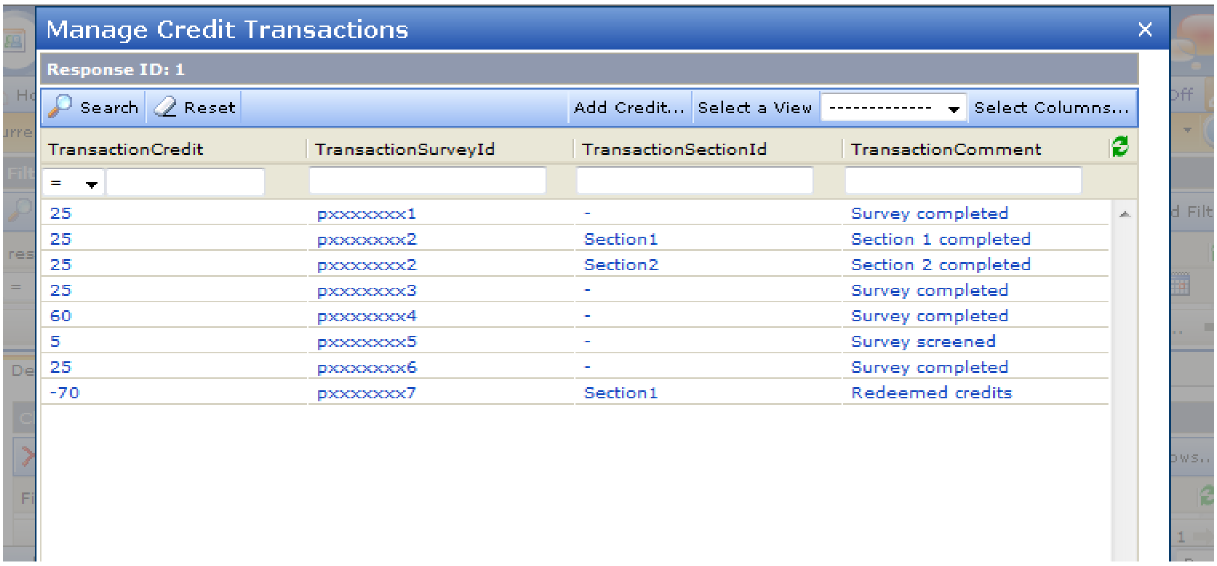


Figure 127 Example of the Manage Credit Transactions overlay

Click on a blue link to open a further overlay where the individual items can be edited.

A version of this page is also available via the **Panel Management > Panelist Credits > Transaction Editor** menu command. The Transaction Editor page however lists all the transactions that have been made for all the panelists in the panel (see Transaction Editor on page 115 for more information).

6.6.1.7. Select Rows

Under default conditions the Single Panelist Editor window will display all the available rows. If you wish to display only a reduced selection of the available rows, click the **Select Rows** button (located towards the right end of the lower pane's toolbar) to open a window that allows you to specify which database rows are to be displayed. Once one or more rows are selected, only those selected rows will be displayed.

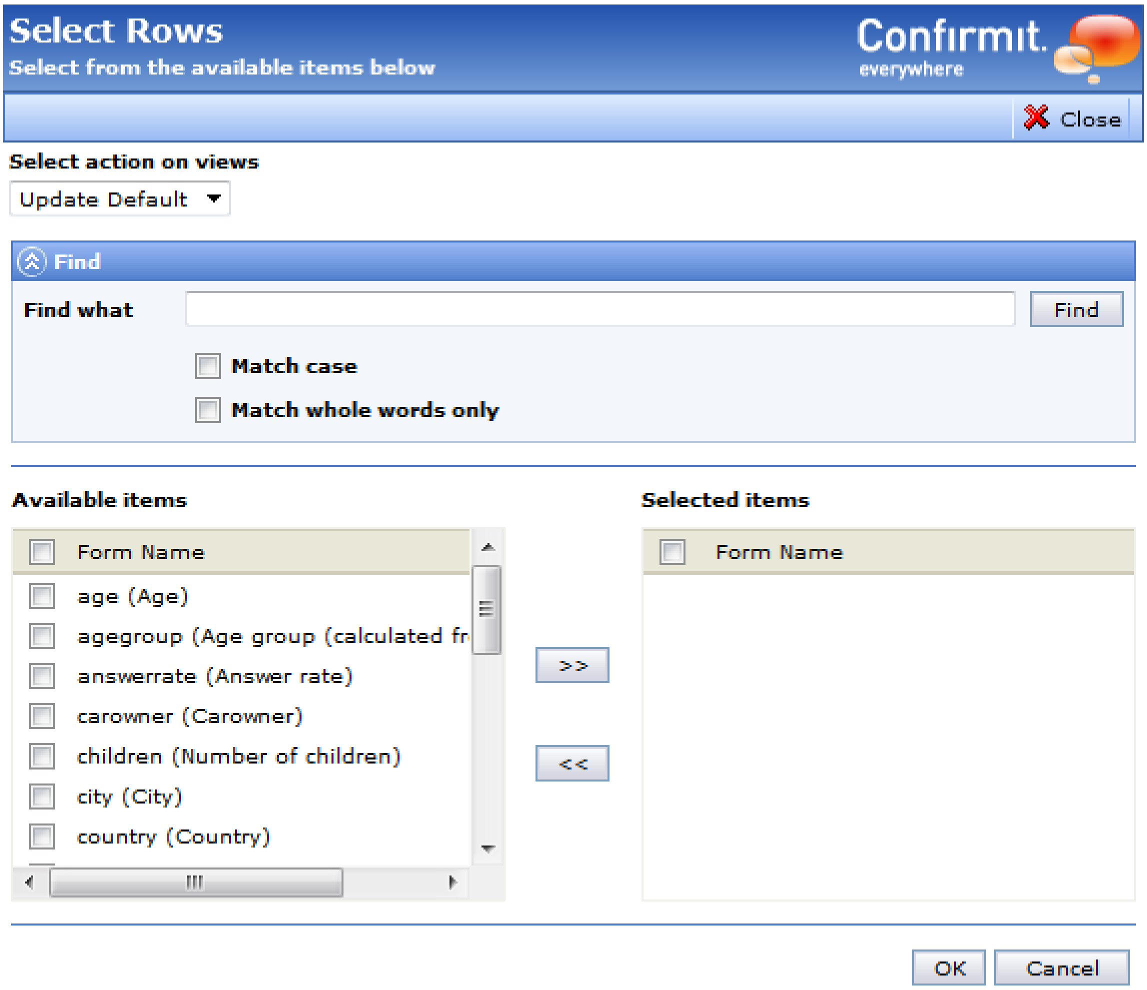


Figure 128 Example of the Select Rows dialog

To select rows:

1. In the Available items column, click on the data rows you wish to be displayed in the list to check the boxes and highlight the rows.

Note: In the event the database contains a large number of rows, use the built-in search facility in the upper pare of the window to reduce the list to a manageable size.

2. Click the **>>** button to move the highlighted items over to the Selected items column.
3. Click **OK**.

   The Panelist Editor window is updated automatically when you click **OK**.

Once you have the rows you required in the window, you can save your layout as the default view, or you can save it as a new view. To do this, go to the Select Action on Views field in the upper part of the Select Rows dialog and make the appropriate selection. Once you have saved a new view, the view will be available in the Select a View field.

6.6.2. Multiple Panelist Editor

Note: The Multiple Panelist Editor functionality is not available for Standard Panels.

Use this function to edit the details of several/many panelists simultaneously. Note that the same changes will be made to the details of all panelists selected using this method. When you go to the Multiple Panelist Editor, the page shown in the figure below opens.

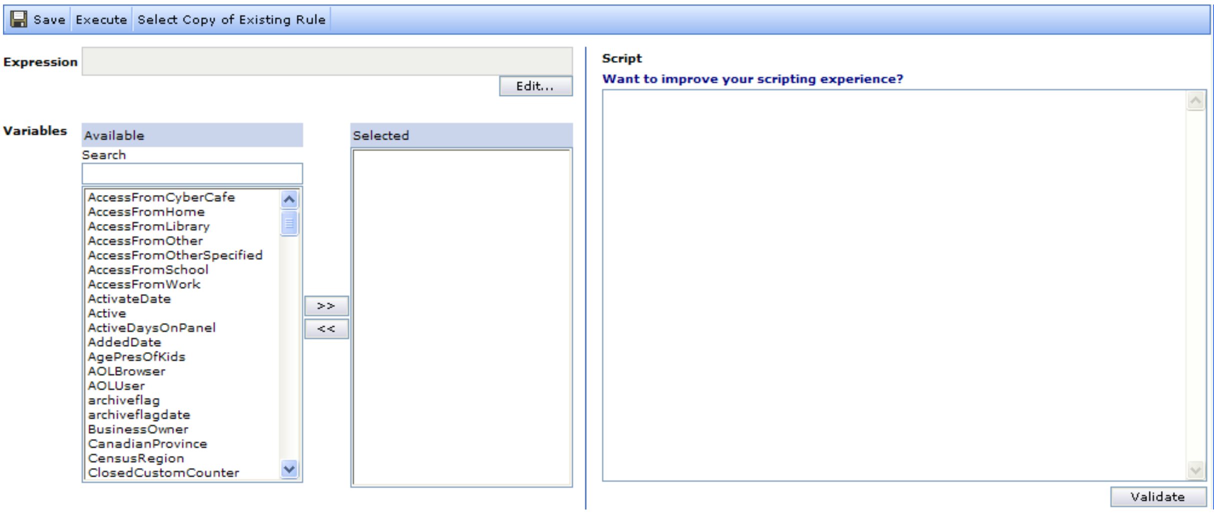


Figure 129 Example of the Multiple Panelist Editor page

Note: If a rule already exists that will find the panelists you wish to edit (and only those panelists!), then you can click Select Rule and select that rule from the resulting list (see Current Rule on page 73 for more information).

To create a condition:

1. Click **Edit**.

   The Expression Editor window opens as shown below.

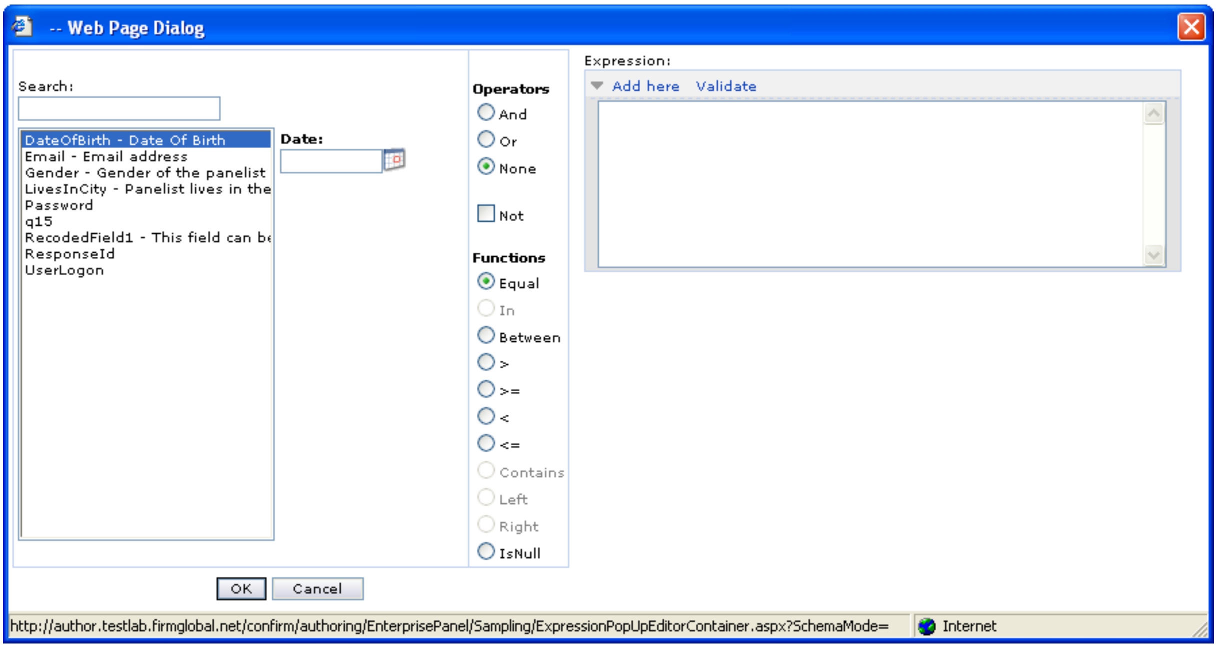


Figure 130 Example of the Expression Editor window

- The left column lists all the questions/columns in the panelist database.
- The second column lists the possible answers for the question/column selected in the first column.
- The third column lists the operators and functions available for the question/column selected in the first column.
- The Expression area displays the expression as you build it, both as the entered code and as "explanatory text" below the Expression field.

Note: If you have the necessary knowledge and information you can type the expression directly into the Expression field. However by doing this you risk creating errors that will prevent the expression from functioning correctly. In most cases, the most efficient method of creating the expression is by using the procedure described below.

2. In the left column, find the question/column you wish to add to the expression and click on it to select it.

   In the event the list is extensive, type characters into the Search field to reduce the list to a manageable size to enable you to find the question you are looking for. Once you have selected a question in the first column, the second column shows the possible answers for that question.

3. In the second column, select or type in the answer you require.
4. In the third column, select the required operator and function.
5. In the expression area, click **Add Here** to copy the selected question and answer(s) into the expression.
6. Repeat the procedure as required to build the desired expression.

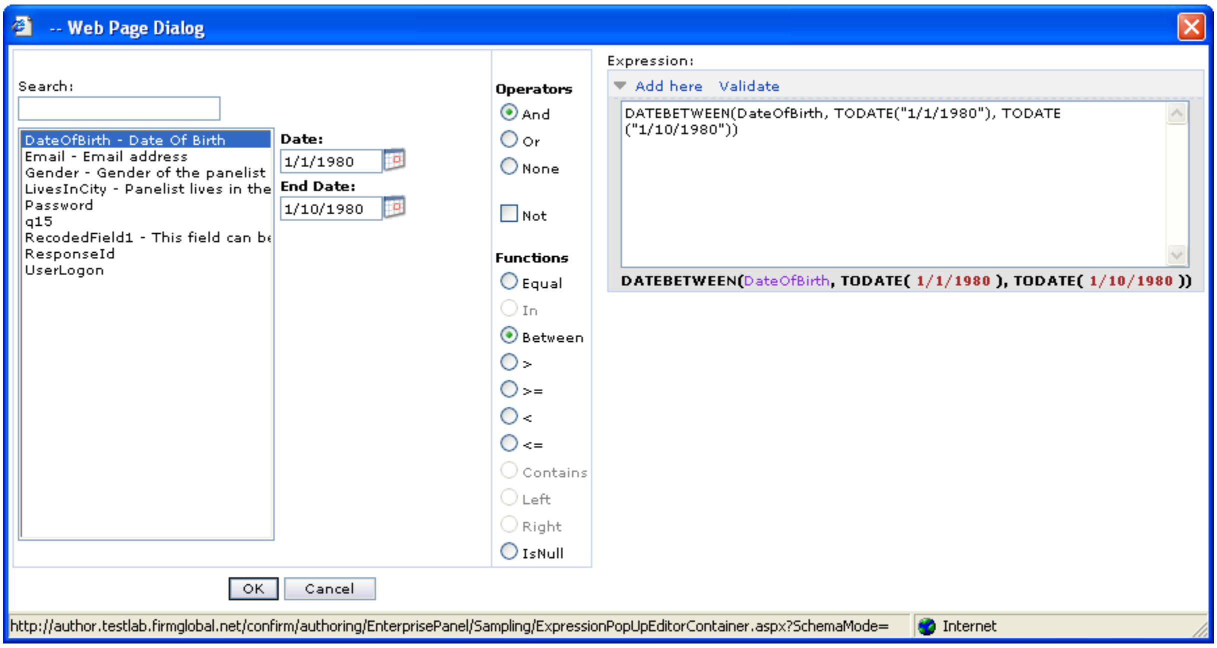


Figure 131 Example of an expression under construction

7. Click **Validate** to check the expression does not contain errors.

Note: Errors will not be possible if you use the method described here, but can arise if you type the expression directly into the Expression field.

8. On completion, click **OK**.

   The Expression Editor window closes and the expression is copied into the Condition field in the Panelist Editor window.

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

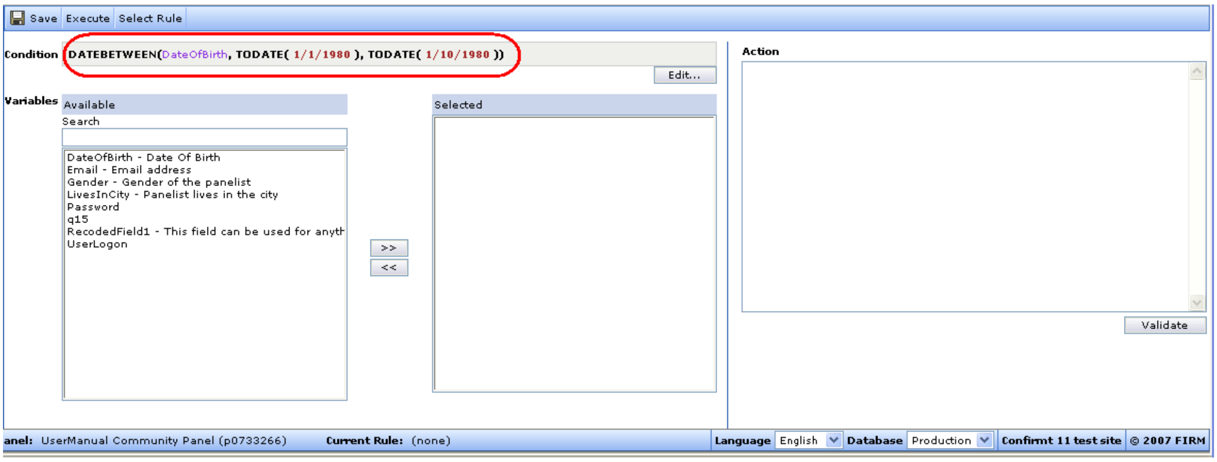


Figure 132 The Panelist Editor with the condition

You now have the condition (ringed above) that will find the panelists that you wish to edit. You must now define which answer you wish to change for these panelists, and what you wish to change the answer to.

10. In the Available column, find and select the answer column you wish to edit.
11. Click the **>>** button to transfer the selection to the Selected column.
12. In the Action field, type in the change you wish to make.

Note: the syntax required here is the same as used in the Rule Editor functionality (see Current Rule on page 73 for more information).

13. Click **Save** to save the changes.
14. When you are sure the condition will find the required panelists, and the change you have specified is correct, click **Execute** to run the condition.

    The system now checks through the panel looking for any panelists answering to the condition. Note that in a large panel this may take some time. On completion, a dialog box opens indicating how many panelists have been found answering to the condition.

Figure 133 Example of a search result

15. If you wish to update the panelist records, click **Update**. Otherwise, click **Cancel**.

6.6.3. Exporting Data

You can export data as a delimited text file.

1. Go to the **Panel Management > Data > Export** menu command.

   The Data Export page opens.

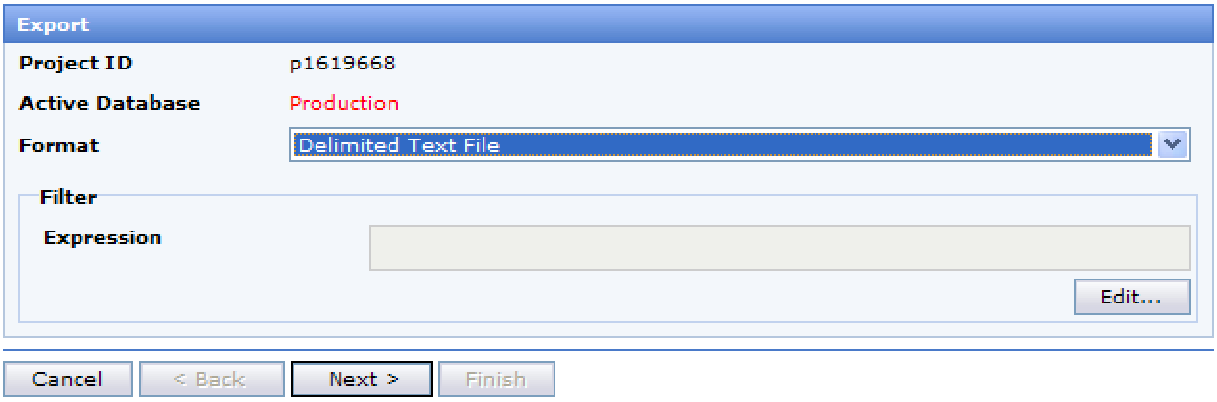


Figure 134 The Data Export page

2. If you wish to create a filter expression, click **Edit**.

   An expression editor window opens. Here you can assemble the filter expression you require. Refer to the separate Professional Authoring User Guide for further details on creating expressions.

   Otherwise, click **Next**.

   The Export Properties page opens.

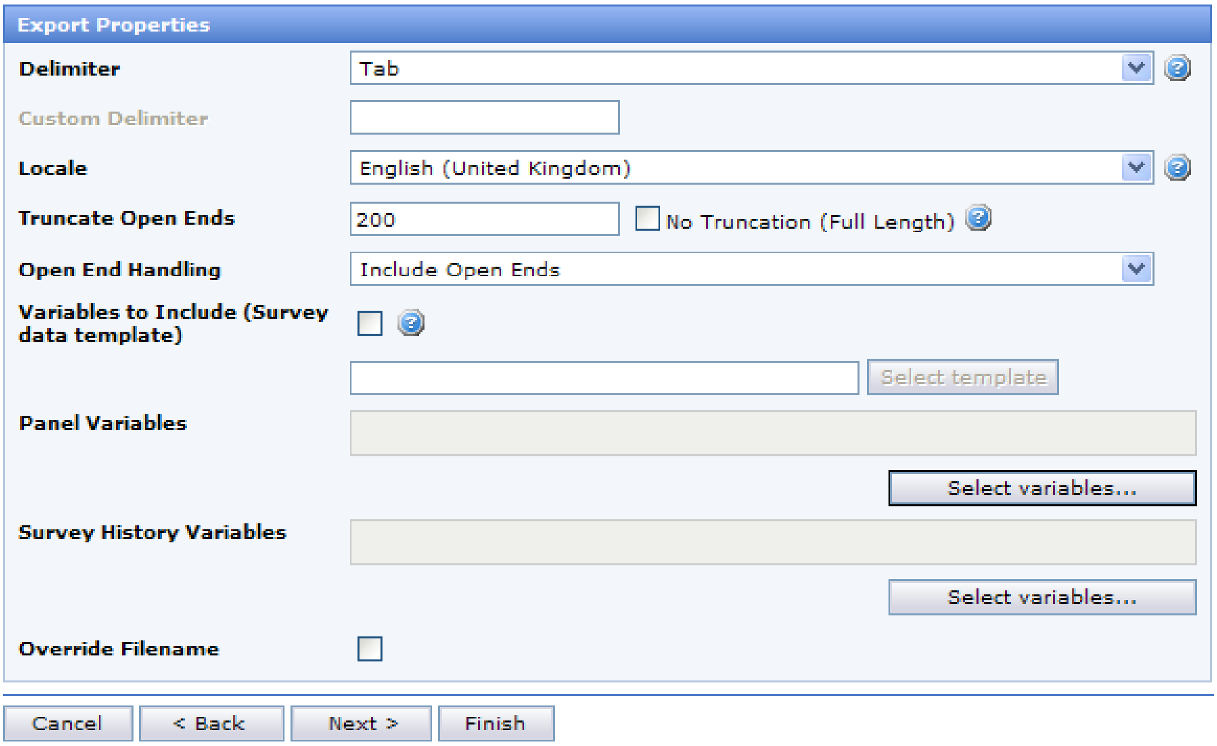


Figure 135 The Export Properties page 1

The various properties and settings are:

- **Delimiter** - a delimiter is a sequence of one or more characters used to specify the boundary between separate, independent regions in plain text or other data stream. An example of a delimiter is the comma character in a sequence of comma-separated values. Select the delimiter that you wish to be used in the data file to be exported. The options are:
  - **Comma** - a Comma (,) -separated ASCII text file is generated. All answers will be inside quotes (""). The variable names will be in the first row.

- o **Tab** - a Tab-separated ASCII text file is generated. No quotes ("") are used. The variable names will be in the first row.
- o **Custom** - the Custom Delimiter field is activated. Here you can select any single keyboard character, which will then be used as the delimiter in the exported ASCII text file.

- **Locale** - determines the formatting of elements such as numbers (decimal point) and dates/times. Select the locale appropriate to the format used in the file.
- **Truncate Open Ends -** For Open Ends (Open Text questions with no field width specified), it is recommended to truncate texts to improve performance. If a number of characters is specified for the Open Ends Width, texts longer than this limit, if any, will automatically be truncated. If No Truncation (Full Length) is selected, the whole text will be imported/exported, but the task may take significantly longer to execute.

Note: There is no filter for Open End type, so all Open Text questions with no field width specified will be included in the export (those with type Normal, Hidden or Background), while those with field width set will not be included.

- **Open End Handling -** defines how open ended questions are handled. The options are:
  - o **Include Open Ends -** all open end questions are included in the export.
  - o **Exclude Open Ends -** no open end questions are included in the export.
  - o **Open Ends Only (one row per respondent) -** only open end questions are included in the export file, with one row in the file for each respondent (all the answers for each respondent are in the same row).
  - o **Open Ends Only (one row per answer) -** only open end questions are included in the export file, with one row in the file for each answer given.
- **Variables to Include... -** you can build templates to choose a subset of data fields for your exports. If you have a template you wish to use, check this box and then select the template. See the Authoring User Guide for further information.
- **Panel Variables -** if you do not have a template to use, click **Select Variables** to open a selection window enabling you to select the panel variables you wish to include in the export. Note that you must select one or more variables or the export will return nothing.
- **Survey History Variables** - if you do not have a template to use, click **Select Variables** to open a selection window, enabling you to select the survey history variables you wish to include in the export.
- **Override Filename -** all export tasks will generate files with unique names in the format: <projectid>_<userid>_<taskid>.<extension>. The "Override filename" functionality allows you to override this system-generated name. Tick this check-box to open a text-box where you can specify a new name.

Note: The '_^PROJECTID^_' part of the name will be replaced by the real project id during the export. Default is ^PROJECTID^_^USERID^_^TASKID^. ^PROJECTID^ is only "required" when executing a rule; it is not "required" when running an export using the Export GUI.

3. Make the appropriate settings and click **Next**.

   The Export Properties page changes to:

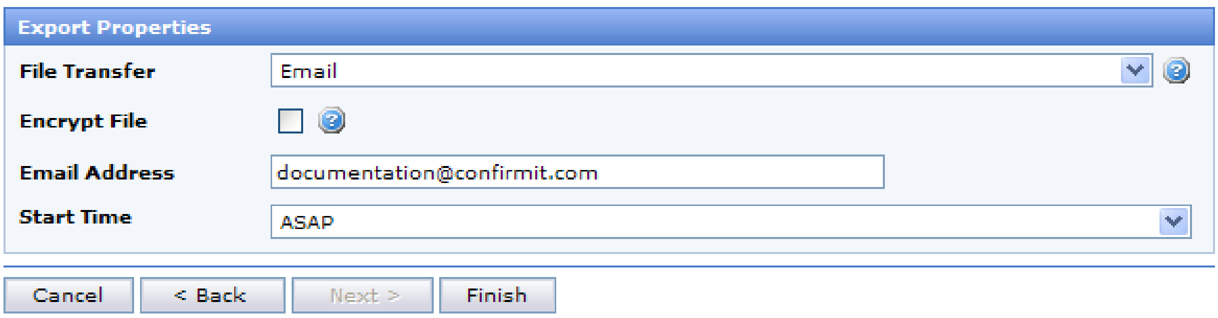


Figure 136 The Export Properties page 2

Here, the properties and setting are:

- **File transfer** - export files can either be sent by email or placed on an FTP server. FTP is the recommended option for large volumes of data, since emails with large attachments may be blocked. FTP can allow automation of data flows, since files can then be picked up automatically by another system/process. Note that your company must license the FTP add-on for this option to be available. Refer to the Authoring User Guide for further details on the FTP functionality.
- **Encrypt file** - data transfer encryption functionality makes it possible to perform secure data exports from Forsta Plus. The encrypted files can then be either ordered by email or sent to the FTP server for downloading. The users will have to decrypt the files using their private PGP encryption keys. Refer to the separate Professional Authoring User Guide for further information on PGP encryption.
- **Email Address** - if Email is selected in File Transfer above, this is the email address to which the email will be sent. Check that the recipient's email address is correct.
- **Start Time** - the time when the export task is to commence. You can select ASAP (as soon as possible) or schedule it for a later time. If you schedule the task for later, then when you click **Finish**, a Recurrence setup page opens. Refer to the Authoring User Guide for further details.

4. Make the appropriate settings and click **Finish**.

   The Rule Executor page opens, detailing the task's progress. When the task has run, the data is exported as a delimited text file. The file will be attached to an email and send to the specified address or sent to the FTP site as selected. On completion, go to another menu item as appropriate to continue with your work.

6.6.4. Importing Data

Respondent data can be imported into a Professional Panel.

1. Go to the **Panel Management > Data > Import** menu item.

   The Data Import page opens.

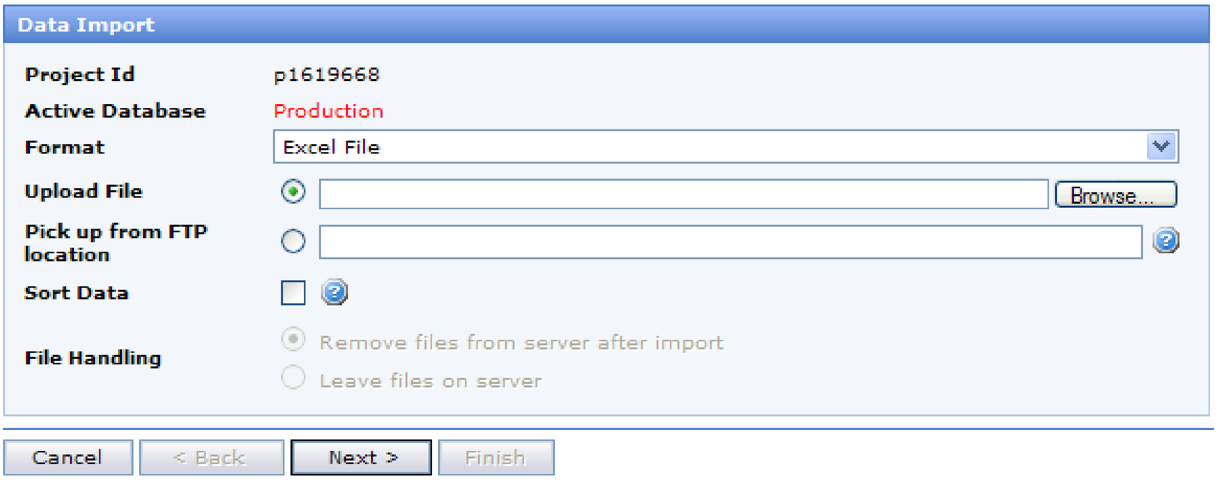


Figure 137 The Data Import page

- **Project ID -** the ID of the current project - the project into which the data will be imported.
- **Active Database -** the database into which the file will be imported.
- **Format -** select the format of the file you wish to import.

Import files can either be uploaded directly in the browser, or placed on an FTP server and retrieved from there (see below). Select the required option.

- **Upload File -** if the import file is to be uploaded directly from the browser, select this option and click **Browse** (see Uploading a File on page 113 for more information).

- **Pick up from FTP Location** - if your company has licensed the FTP add-on and it has been enabled, this option will be active. You can then fetch the file to be uploaded from Forsta's FTP location. Forsta's FTP address is specified as part of the enabling procedure and cannot be changed, so you must add only the file name to this field. Refer to the separate Professional Authoring User Guide for further details on the FTP functionality.
- **Sort Data -** [Excel only] when importing Excel files, data in all sheets must be sorted by key columns. If the data in your import file is not sorted, check this check box to instruct the task execution to sort data in all the Excel sheets automatically. Please note that sorting may take some time for large data.
- **File Handling -** if you select "Pick up from FTP Location", these options become active. You can then also decide what to do with the original files on the FTP site; leave them there or delete them. Note that fetching from FTP can allow automation of data flows, since you can set up the system to pick up files automatically.

The properties and settings available in the following steps in the procedure will depend on the format you have selected here.

6.6.4.1. Uploading a File

To upload a file:

1. Go to the **Panel Management > Data > Import** menu item.

   The Data Import page opens.

2. Select the required file format, then click **Browse**.

   A standard file browser window opens.

3. Find and select the file you wish to upload, then click **Open**.

   The file path is added to the Upload File field.

4. Click **Next**.

   The Import Properties page opens.The fields available on the page will depend on the type of file you are importing.

5. Make the appropriate settings and click **Next** or **Finish**.

   If you click **Finish**, the import task will be added to the queue. If you click **Next**, you are given the opportunity to set up a recurring task such that the file will be imported at regular intervals.

Refer to the separate Professional Authoring User Guide for further details on uploading files.

6.6.5. Data Templates

You can create data templates for Professional Panel projects that can be edited in the Template Editor in the same way as with normal projects. These templates can be used when exporting and importing data. Refer to the separate Professional Authoring User Guide for further information on templates.

6.7. Calculate Variables

The values in recoded variables are not updated automatically as response data is added to the questionnaire; the values must be calculated and updated as a specific operation. You can perform this task manually as required when respondents complete the survey, or you can set the variable calculation to run automatically as a recurring task.

1. Go to the **Panel Management > Calculate Variables** menu command.

   The page shown below opens.

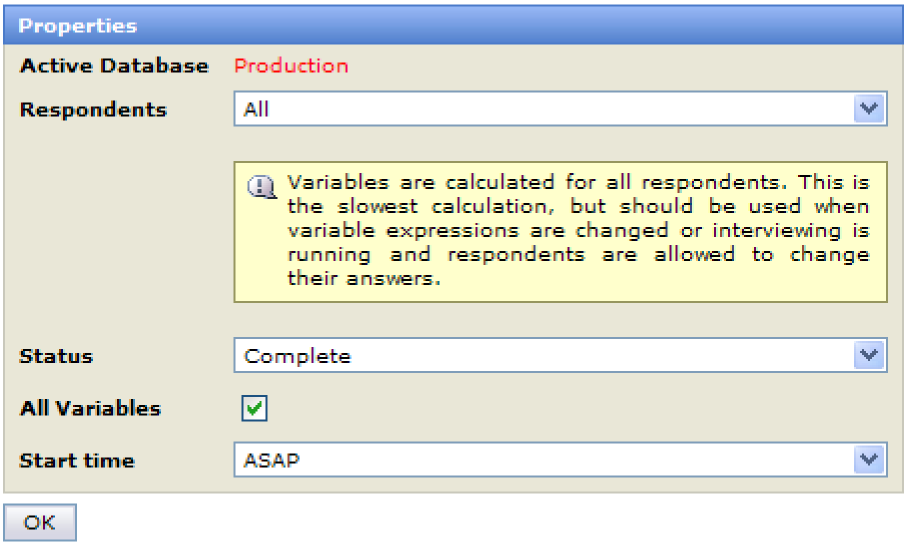


Figure 138 Calculating the Variables

The fields and options are as follows:

- **Active Database** - the currently selected database. Use the selection box in the lower right corner of the Forsta Plus window to change this as necessary.
- **Respondents** - choose whether you want to calculate variables for All respondents, Uncalculated respondents, or only New respondents.
- **Status** - choose whether you want to calculate variables for all respondents, or only those with the status Complete or Incomplete.
- **All Variables** - if you do not wish to update all the variables, uncheck this box to open a text field where you can input the variables that are to be updated.
- **Start time** - select the start time for the batch job: **ASAP** or **Schedule for later execution**.

Make the appropriate settings and click **OK**. If you have selected Schedule for later execution, then when you click **OK** the Task Recurrence page opens. In this case, make the settings as required and click **Save**.

For further information on recoding variables, refer to the Authoring User Guide.

6.8. Panelist Credits

Panelist Credits are stored in the Credit Transaction History loop level, which is added to new panels automatically on creation and is located in the Panel Variables toolbox (see The Panel Variables Toolbox on page **Error! Bookmark not defined.** for more information).

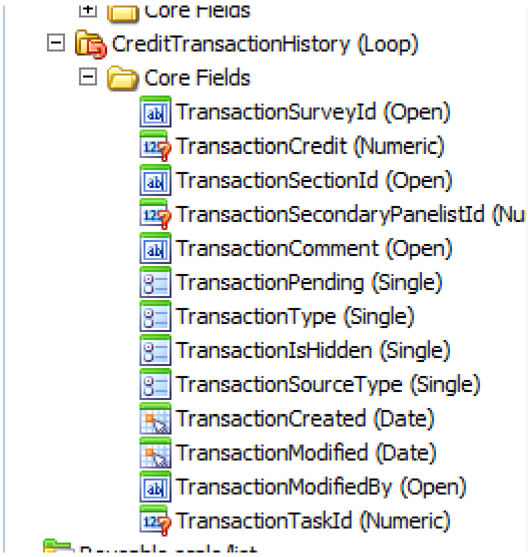


Figure 139 The Credit Transaction History folder in the Panel Variables toolbox

The **Panel Management > Panelist Credits** menu command enables you to import and export panelist credits. The menu contains four options:

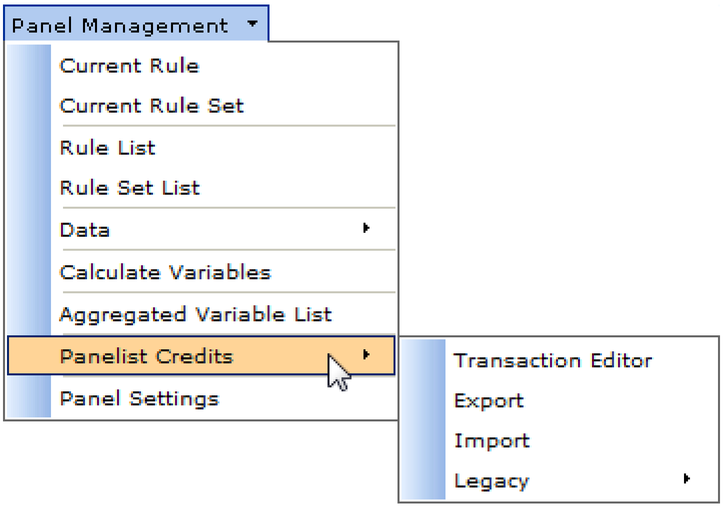


Figure 140 The Panelist Credits menu

See the following sub-sections for further details. The Legacy sub menu enables import to and export from only the old legacy Panelist Credit system.

6.8.1. Transaction Editor

Go to the **Panel Management > Panelist Credits > Transaction Editor** menu command to open the Transaction Editor page. Here you can edit each of the credit transactions that has been performed in the current panel.

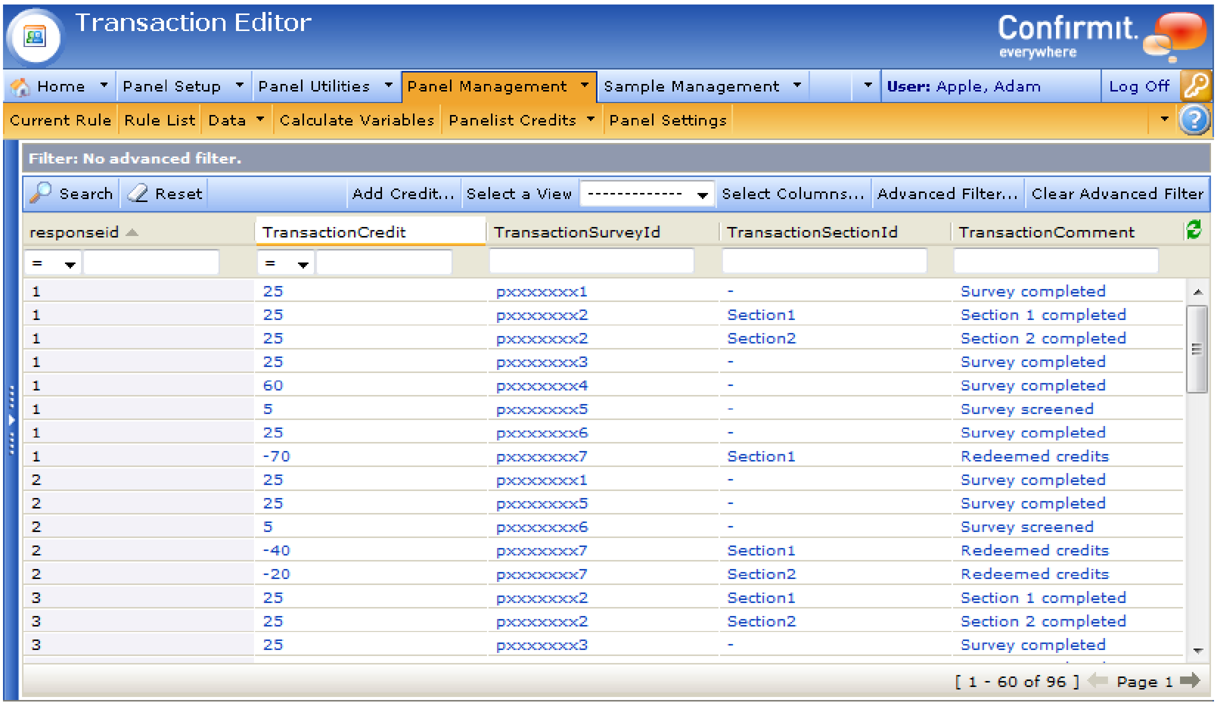


Figure 141 Example of the Transaction Editor page

Click on a blue link to open an overlay where the individual items can be edited.

Click on the column headers to sort the list by the selected header. Enter criteria into the search fields at the top of the columns to display only those records that comply with the specified criteria.

A version of this page is also available by clicking the **Manage Credits** button on the Single Panelist Editor page accessible via the **Panel Management > Data > Single Panelist Editor** menu command. The Manage Credit Transaction page however lists only the transactions that have been made for the selected panelist (see Manage Credits on page 105 for more information).

6.8.2. How to Export Panelist Credits

If you do not add a filter expression, this procedure exports the panelist credits for all the panelists in the selected panel.

1. Go to **Panel Management > Panelist Credits > Export**.

   The Export Panelist Credits page opens.

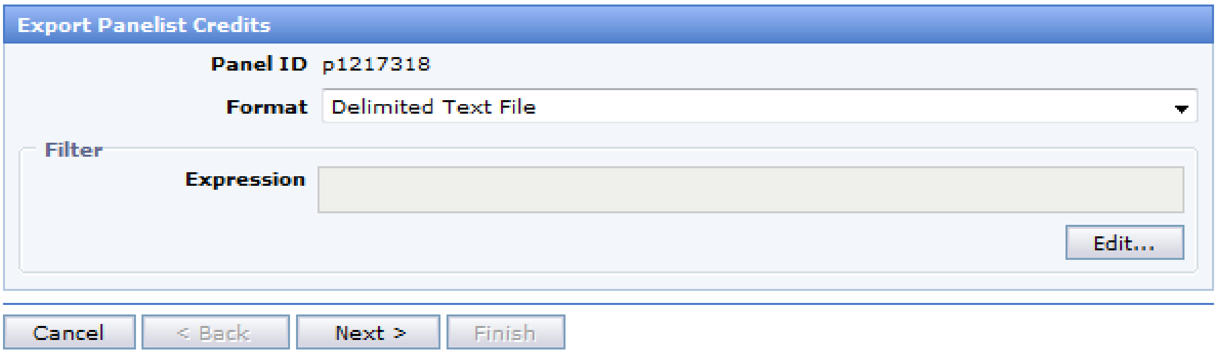


Figure 142 The Export Panelist Credits dialog - 1

2. Select the desired output format, and if you only wish to export a sub-set of the panelist credits then add a filter expression to remove those that you do not wish to export.
3. Click **Next** - the dialog changes.

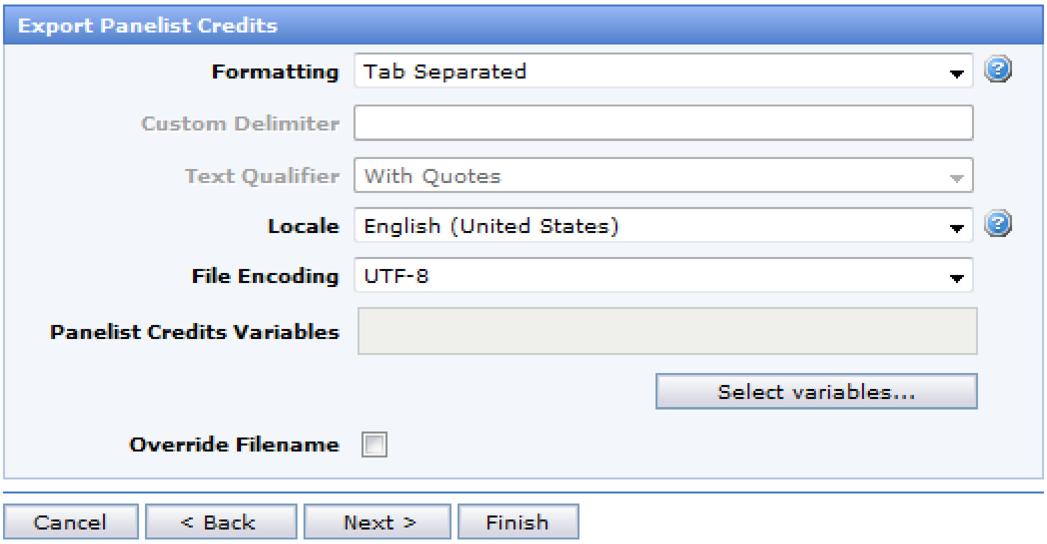


Figure 143 The Export Panelist Credits dialog - 2

4. Click **Select Variables**, select the Panelist Credit Variables you wish to export, make the appropriate selections for the remaining properties, then click **Next**.

   The dialog changes again.

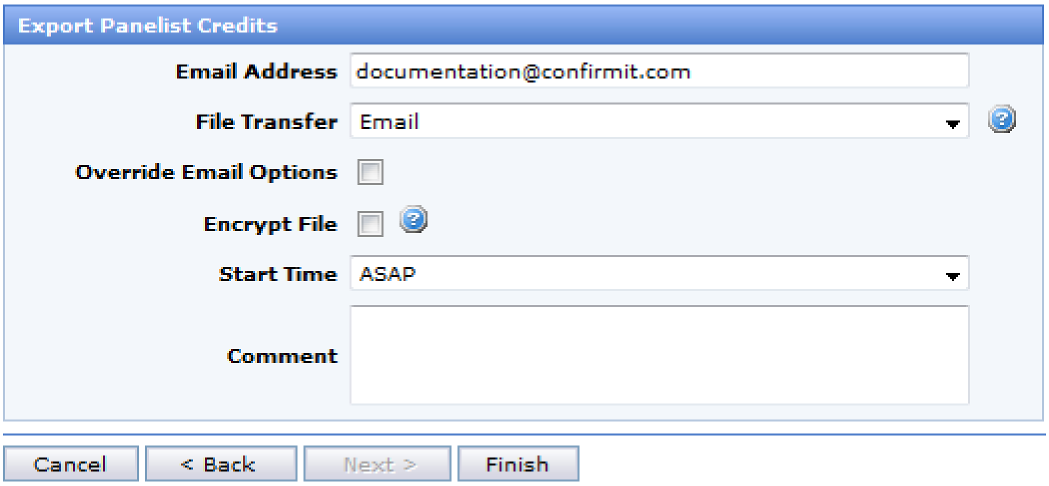


Figure 144 The Export Panelist Credits dialog - 3

5. Select the type of transfer you wish to perform; Email or via FTP.

Note: The FTP transfer option is a chargeable add-on. This option will only be available if your company has the appropriate license. If so, the FTP site details will be specified automatically by Forsta Plus.

6. If Email is selected, check the recipient email address is correct and edit as necessary.
7. Specify the start time for the transfer.

   If you select Schedule for Later Execution, you can set the export to be a recurring task, that is, it will be performed automatically at specified time intervals.

8. Click **Finish**.

   At the specified time, the credits are added to a file in the format you have selected, and this file is zipped, attached to an email, and sent to the stated address.

6.8.3. How to Import Panelist Credits

The panelist credits for a panel can be exported as a zipped .txt file, via email, or if you have the appropriate license, via FTP (see How to Export Panelist Credits on page 116 for more information). Note that there are a number of information columns that must be included in the .txt file to be imported. These are "required fields" and must have the column headers as shown:

Field/column name	**Description**	**Required/Optional**
responseid	The unique responseid ID of the panelist. Maximum number of characters is 50.	Required for Append (or use email)
email	The email address of the panelist. Will not be imported to the panel credit table, but is used to find the matching responseid.	Required for Append (or use responseid)
CreditTransactionHistory	The Id of the particular credit entry.	Required for Update
TransactionSurveyId	The project Id of the project for which the credit is being granted.	Optional
TransactionCredit	The credit amount.	Optional
TransactionCreated	The date for the credit entry. Format yyyy-MM-dd hh:mm:ss.	Optional
TransactionComment	A text string, up to 256 characters.	Optional
TransactionSectionId	A string used if credits are to be assigned multiple times for one project. Up to 40 characters.	Optional
TransactionSecondaryPanelistId	If points are received from another panelist (e.g. refferals), this is the panelist id of the panelist who gave the points.	Optional
TransactionPending	Is the transaction pending (true/false)? A transaction is pending in a survey until the respondent has been given a status in the survey.	Optional
TransactionType	Why the transaction has been made; a normal update, a correction to the current value, some credit has expired etc.	Optional
TransactionIsHidden	Is the transaction hidden; true or false.	Optional

If the file has been exported via email, save the file attachment to an appropriate folder in your network.

1. Open the Panel to which you wish to import the panelist credit file.
2. Go to the **Panel Management > Panelist Credit** menu command and select **Import**.

   The Import Panelist Credits dialog opens.

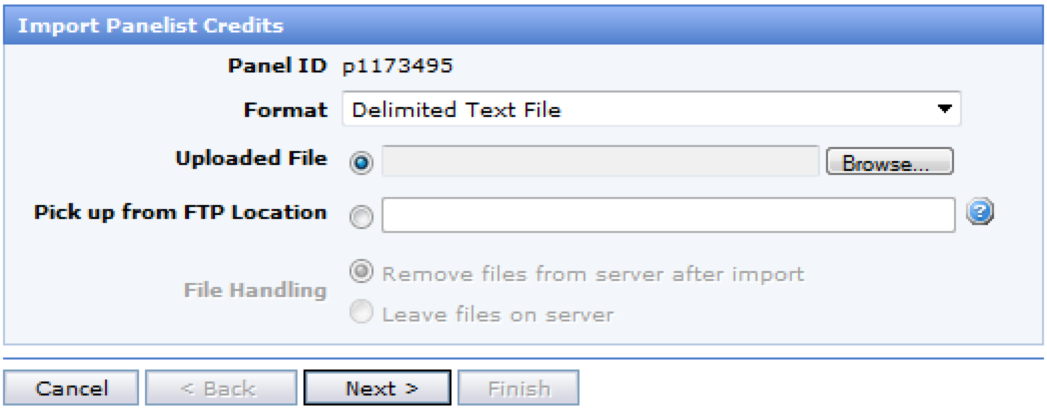


Figure 145 The Import Panelist Credits dialog

3. If the file has been exported via email, select the Transfer Type to be **Upload** then browse to the file that is to be uploaded and select it. If the file has been exported to FTP, type the file name into the File Name field.

Note: FTP export requires your company to license an add-on. The FTP site details will then be specified automatically by Forsta.

4. Select the Key Field that is to be used to identify the panelists to which each credit value is to be credited.

   This list is populated automatically from the fields available in the panel.

5. Set the start time for the import task.

Note: If the file is to be exported at regular intervals (using a recurring task) then you can also set the import to occur at corresponding intervals, thereby updating the credits automatically. In this case, ensure you allow a delay between the times set for the exports and the imports to allow for possible queues in the task server.

6. Click **OK**.

   The import will be performed at the specified time(s).

6.9. The Panel Settings

You can define some custom settings for the panelists' password requirements, and you can show or hide a number of the sampling setting features. These are defined separately for each panel, so different panels can have different password requirements and sampling settings.

Note: You must actively go to the Panel Settings page and make the settings for each panel.

1. When in the Professional Panel, go to the **Panel Management > Panel Settings** menu command.

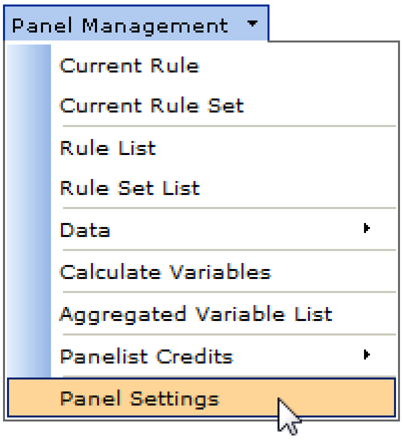
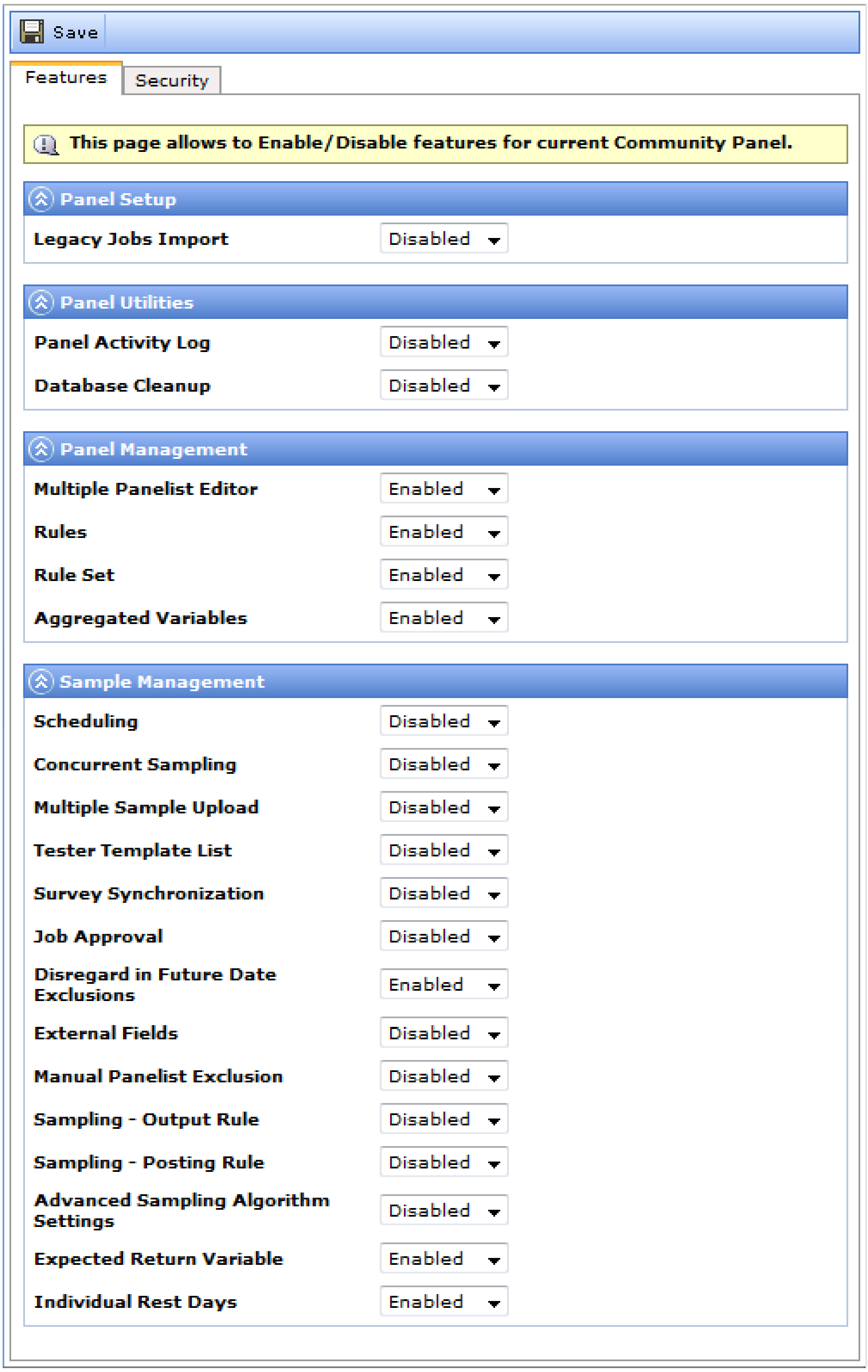


Figure 146 The Panel Management > Panel Settings menu command

The Panel Settings page opens at the Features tab. The Features tab enables you to show or hide features as required for specific projects (see The Panel Settings Features Tab on page 120 for more information). The Security tab allows you to adjust the password and HTTPS settings (see The Panel Settings Security Tab on page 121 for more information). Forsta has a defined policy regarding password complexity etc. (see Password Policy on page 6 for more information).

6.9.1. The Panel Settings Features Tab

The Features tab enables you to show or hide features as required for specific projects. This allows "unnecessary" features to be hidden such that they do not distract the user or fill the screen with unwanted menus etc. The items are described in other sections in this documentation. For each item, the options are Enabled and Disabled.



6.9.2. The Panel Settings Security Tab

The Security tab allows you to adjust the password and HTTPS settings.

Note: You must actively go to the Panel Settings page and make the settings for each panel. No changes will be made to the panel's password settings unless you do so.

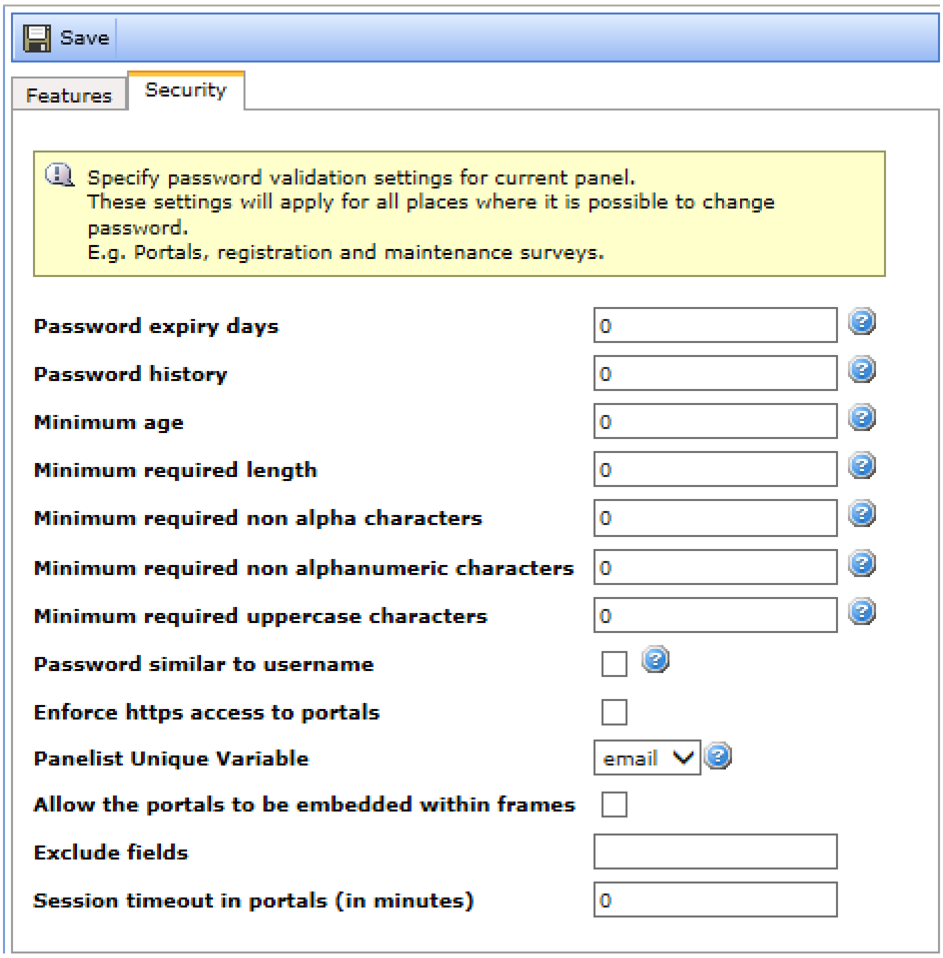


Figure 147 The Panel Settings Security tab

The options are as follows:

- **Password expiry days -** specify how many days the password is to be valid after it has been changed. Use 0 to disable this functionality such that the password does not expire.
- **Password history -** specify that the new password must be different from the last X passwords used. This prevents the panelist merely using the same password over and over again. Use 0 to disable this functionality such that the same passwords can be reused.
- **Minimum age -** specify the number of minutes the user must wait after changing the password before they are allowed to change it again. Use 0 to disable this functionality.
- **Minimum required length -** specify the minimum number of characters (of all types) that a password must have. Use 0 to disable this functionality such that a password can be of any length.
- **Minimum required non alpha characters -** specify the minimum number of non alpha characters a password must have. This will force the panelist to use numerical and/or other characters in the password, thereby making it more difficult to guess. Use 0 to disable this functionality such that the panelist can use only alpha characters if so desired.
- **Minimum required non alphanumeric characters -** specify the minimum number of non alpha-numeric characters (for example #¤%& etc) that must be included in the password. Use 0 to disable this functionality.
- **Minimum required uppercase characters -** specify the minimum number of upper-case characters that must be included in the password. Use 0 to disable this functionality.
- **Password similar to username -** check the box if the password is to be validated against the username to ensure that the password and username are not identical. Leave the box unchecked to disable this functionality, thereby allowing the panelist to use their username also as their password.

- **Enforce HTTPS access to portals -** check the box to force the user to use HTTPS when accessing the portal.
- **Panelist Unique Variable -** specifies the variable that is to be used to uniquely identify a panelist, for example email or CustomerId. This will be the variable used as the username when the user logs in to the portal. The variable must be defined with the property Unique set to true.
- **Allow the portals to be embedded within frames -** check the box if you want to allow the portal to be embedded within another web site in an iframe. If this option is not checked, the portal can not be embedded in an iframe.
- **Exclude fields -** for improved protection of panelists it is possible to exclude specified data fields, for example Personally Identifiable Information (PII) from viewing and exports. You may wish for example to exclude email addresses from exports so that users cannot retrieve panelists' email addresses from any kind of data export from the panel or surveys linked to the panel. Write the field names into this field, using comma or semicolon to separate the field names if more than one field is to be excluded, and save the changes, to exclude the specified fields from all exports. Note that excluded fields are listed in the task log and in notification emails.
- **Session timeout...** - add a time in minutes to specify how long a session will be kept active before the panelist will need to log in again. If empty, the system defaults for session timeout will be used.

Note: A special Normal role is available for users that prevents access to the Panel Settings, thereby preventing normal users from making changes to this option. If a user has this special Normal role then he/she will not be able to unlink a panel from the survey. Any changes to this field are registered in a special activity log - refer to the Admin manual for further information.

When you have made any changes, click **Save** to save them.

7. The Sample Management Menu

A Sample is a group of people who have been selected from a Panel to participate in a particular survey. The members of the sample will have specific characteristics that make them suitable for that survey.

When a person agrees to be a panelist, they complete a questionnaire to provide their personal details and other information that the survey company (your company) may require. There could be hundreds of questions. These could include such details as where the panelist lives, whether they drive and/or own a car and if so what type, whether they have any children and if so how many, their ages, sexes, what types of schools they attend, whether they have any pets and if so what types etc. The panelist’s answers to these questions are entered into a database and later used to determine the panelist’s suitability to participate in a particular survey. For example, if a company that manufactures dog-food has asked for a survey to be conducted to analyze dogs’ preferences in a particular town, there is not much point in including a panelist who does not own a dog or who lives in a different town.

Additional criteria, such as whether the prospective panelist has recently participated in a survey of a particular category, or participated in a survey of any category, within a specified period, can also be included in the sample selection process. These “exclusion” criteria will help to prevent panelists becoming overworked and perhaps bored with answering surveys. You can also use similar functionality to re-include potential panelists who were previously excluded automatically for other reasons.

Forsta’s Sample Management function uses the panelists’ details in the database, and the additional criteria, to assemble a group of panelists who are suitable for a particular survey. The required number of panelists are then selected randomly from that group.

Note: Forsta Plus does not support sampling from both Basic Panel and Professional Panel into the same survey.

It is not possible to sample to closed surveys from Standard or Professional Panels. If you attempt to do so, an error message will be displayed.

The panelists that are selected for a survey are “booked” in the system for a defined period from the moment that the job for which they have been selected is executed. The selected panelists are flagged in the database, and will be available to be included in jobs that are executed later according to the mailing dates and exclusion rules for those jobs.

The sections in this chapter describe the functionality available through the Sample Management menu, and the procedures required to make use of that functionality.

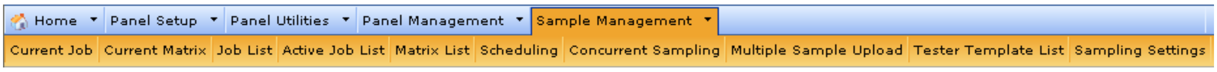


Figure 148 The Sample Management menu

Click on **Sample Management** to access the sub-menu commands. The Job List is automatically displayed below the menu. Click on a job in the list to select it and go to the **Current Job** window.

7.1. Current Job

A sampling job is a group of sampling definitions with common properties that is to be scheduled and executed as one job. This produces a sample file as output, and some reports on the outcome of the sampling job. The sampling job will operate on a subset of the panel defined by a “global criteria” (a global filter, for example only panelists from a particular state).

The Current Job window provides general information about the selected job and enables you to define and edit the criteria for the job. To open this window, go to the **Sample Management > Current Job** menu command. The window contains seven tabs:

- **Job Information** – define the basic details for the job.
- **Exclusions** – define any date-related automatic and manual exclusions, and manually relax exclusions that have been applied automatically.
- **Universal Criteria** – create the background panelist-selection expression.
- **Sub Samples** – a survey may need groups of respondents with different characteristics. The Sub Samples function allows you to create such groups.

- **Additional Items** – specify which columns of information about the selected panelists are to be included in the resulting text file.
- **Execution** - confirm the panel selection and book the panelists for the job.
- **Reporting** – view, and print as necessary, reports on the outcomes of the sampling jobs..

7.1.1. The Job Information Tab

This tab provides basic information about the current job.

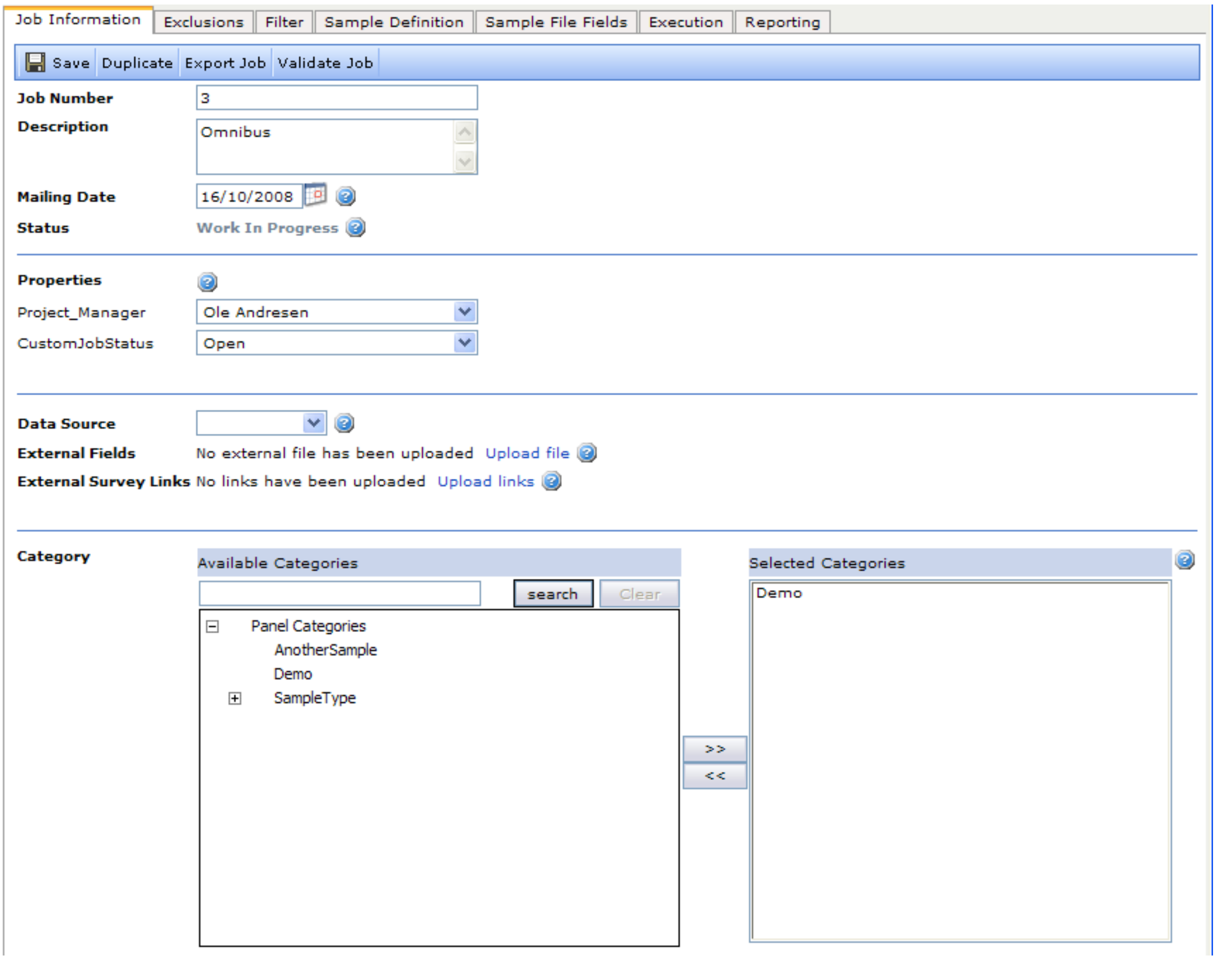


Figure 149 Example of the Job Information tab

7.1.1.1. The Tool bar

- **Save** – click to save the changes you have made to the job. The button flashes while Forsta Plus has unsaved changes.
- **Duplicate** – makes a copy of the current job so you can create a new job to the same specifications. You will be required to give the new job a different job number, and the Job Status will be reset to Work In Progress, but all other details will be identical to the original job. Once the job has been duplicated and given a new number, you can then edit the job as required.
- **Export Job** – exports the job definition (not matrices) to a text file and sends the file to the stated email address. This function can be used by customers with their own servers to copy jobs from one server to another.
- **Validate Job** – tests the job to ensure there are no logical inconsistencies that would cause the procedure to fail when the panelists are actually being selected.

7.1.1.2. The Data Fields and Areas

- **Job Number** – a unique identification number for the job. The number is generated when the job is first created, though it can be changed if necessary.
- **Description** – a free-text description of the job to simplify identification later. You can edit the description at any time.
- **Mailing Date** - a calendar that enables you to set and change the mailing date (see How to Set the Mailing Date on page 132 for more information).
- **Status** – the current status for the job. The job status is changed automatically by the system when for example the job is uploaded, when it is emailed etc.
- **Properties** – you can define properties for the jobs (for example "Complexity"), and specify options for the property (for example "Low", "Medium" and "High") (see The Property Definitions Tab on page **Error! Bookmark not defined.** for more information). You can then specify the property and option for each job, and these can be used when excluding panelists from jobs (see The Auto Job Exclusion Tab on page 129 for more information).
- **Data Source** - a list of the available BitStream files used as a base for sampling.
- **External Fields** – allows you to upload additional information on an individual panelist or for a group of panelists. This information will be in the form of text files that must be created outside of Forsta Plus and uploaded. The files must be tab-delimited with PanelistId as the key column, followed by the external fields as shown in the image below. (see How to Upload a File on page 127 for more information).
- **External Survey Links -** allows you to upload a repository of unique links to an external survey. The links will be added to the Sample file and can be uploaded to a Forsta Plus project that handles the statusing and redirecting for the Sample Only job.
- **Category** – A panel's category is specific to that panel. Use this area to define the category or categories to which the job is to apply. The Panel Categories list is a logical hierarchy of all the registered categories (see The Categorization Tree Tab on page **Error! Bookmark not defined.** for more information).

```
PanelistId        Country Region  HouseholdSize↓
1         Austria ADE     3↓
4         Norway  OSL     2↓
6         Belgium BRU     4↓
7         USA     NYC     5←
```

Figure 150 Example of a text file with a list of panelist information

7.1.1.3. Procedures in the Job Information Tab

7.1.1.3.1. How to Duplicate a Job

1. Click the **Duplicate** button in the blue Job Information tab toolbar.

   The Duplicate Job dialog opens.

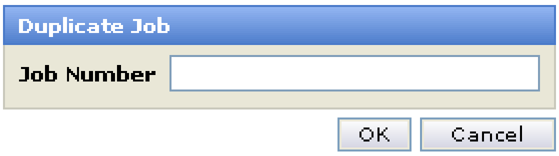


Figure 151 The Job Import dialog box

2. Type a unique job number for the duplicate job into the data field.
3. Click **OK**.

   The new job opens in the Forsta Plus window, is listed in the **Sample Management > Job List** window under its job number, and can be selected and edited as required.

7.1.1.3.2. How to Export a Job

1. Click the **Export Job** button in the blue Job Information tab toolbar.

   The Job Export dialog opens. The default email address (that of the current user) is included as default in the Email Recipient field.

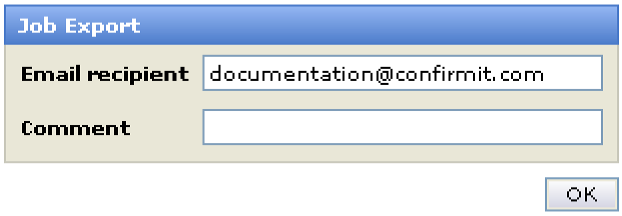


Figure 152 The Job Export dialog box

2. If necessary, change the email address to that of the intended recipient.
3. Type a comment if required.
4. Click **OK**.

   The new job opens in the Forsta Plus window, is listed in the **Sample Management > Job List** window under its job number, and can be selected and edited as required.

7.1.1.3.3. How to Upload a File

You can upload text files of additional information on panelists or external survey links. The upload procedure is the same for both types of file.

Note: The text file must be of .txt format and must be named matchfile.txt. The link file must be of .txt format with 'Link' as the only column header and all the links below

1. In the External Fields area, click the **Upload File** link.

   The Upload Settings dialog box opens.

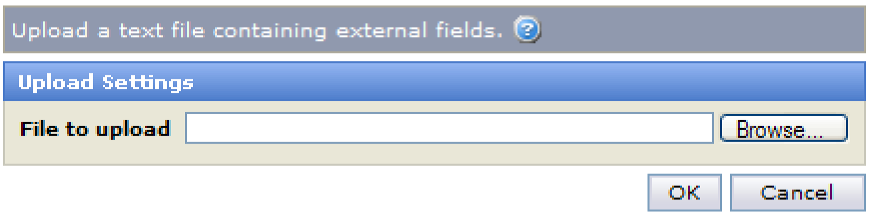


Figure 153 The Upload Settings dialog box

2. In the dialog box click **Browse**.

   A standard File Selection window opens.

3. Browse to and select the required file, then click **Open**.

   The file path and name is added to the File to Upload data field.

4. Click **OK** to complete the upload, or **Cancel** to return to the Job Information tab.

7.1.1.3.4. How to Check the Job

You can check the current job at any time during the construction process, to ensure it will function correctly and to view a list of any errors or problems.

1. Click the **Validate Job** button in the Job Information tab toolbar.

   An information dialog opens with a list of any errors or problems that the job may contain.

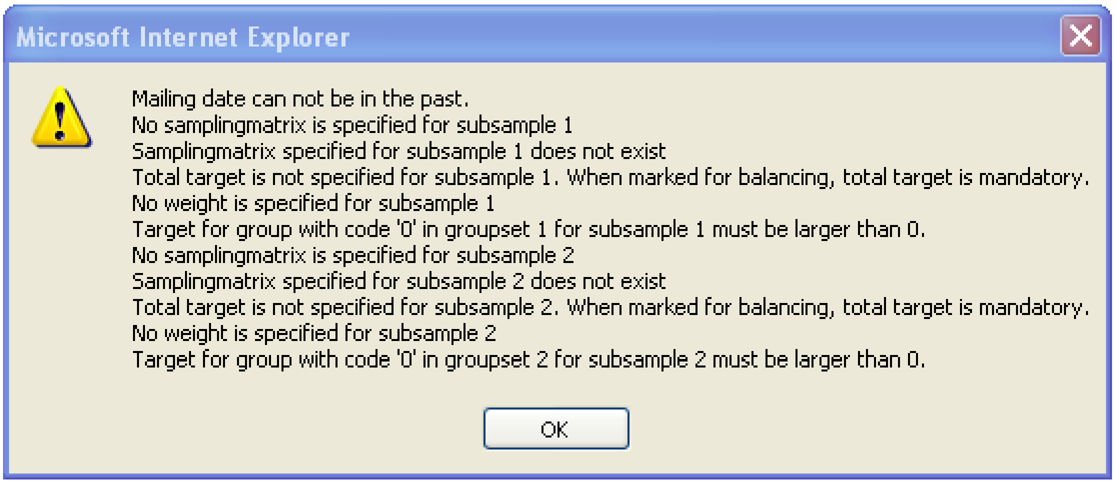


Figure 154 Example of a verification message list

You must now work through the list and correct the problems.

2. Click **OK** to close the list dialog.

   Once all the errors have been corrected, when you click the **Validate Job** button the “Sampling Job is Valid” message box is displayed as shown below.

Figure 155 The Job is Valid message box

7.1.1.3.5. How to Select a Category

If the Available Categories list is extensive or contains many similarly-named categories located in different branches of the hierarchy, you may wish to perform a search to locate the category you are looking for. To find panel categories:

1. Type an appropriate combination of characters into the data field at the top of the Available Categories column. Wildcards are not necessary.

2. Click **Search**.

   Forsta Plus will find and display all the instances of that combination of characters that are to be found in the Panel Categories hierarchy.

   For example if you type **Product** into the field and click **Search**, Forsta Plus will find all categories with the word Product anywhere in the category name. Note that you do not need to type in complete words. For example, type **ll** into the field and click **Search** to find all categories with **ll** anywhere in the name, such as any category with the word **small** in its name, or **grill**, or **rolls**….

   If after typing in the first search criteria the list is still long, you can perform a search through the first set of results by repeating the procedure using other search criteria.

   To reset the search filter and restore the entire hierarchy to perform a new search, click **Clear**.

3. Once you have found the required category, click on it to select it, then click the **>>** button located between the columns.

   The selected category is moved from the Available Categories column to the Selected Categories column.

Note: You can select as many categories as you wish.

To remove a category from the Selected Categories list, click on it to select it and then click the **<<** button located between the columns. The category is returned to the Available Categories list.

4. On completion, click **Save** to save the changes.

Note: The Save button flashes while the system contains changes that have not yet been saved.

7.1.2. The Exclusions Tab

You may wish to exclude potential panelists from a job for various reasons. For example you may wish to avoid using panelists who have recently been asked to reply to a survey of a particular category, or those who have recently been asked to reply to a survey of any category. The Exclusions tab enables you to set time-frames around the job's planned mailing date, within which such panelists will be excluded.

The Exclusions tab contains three sub-tabs:

- **Auto Job Exclusion** – panelists are excluded automatically if they conform to the general rules set here.
- **Manual Job Exclusion** – you can set additional exclusion rules and/or relax some rules.
- **Manual Panelist Exclusion** - you can upload a file with a list of panelists, and these panelists will be excluded.

7.1.2.1. The Auto Job Exclusion Tab

In the Auto Job Exclusion tab you can select the type of exclusion you wish to use; Project, Category, Date and/or,Property, and set the dates within which you wish the exclusion rules to apply.

You can also exclude all panelists so you can then go to one of the other tabs and relax the exclusion for specific jobs and/or panelists.

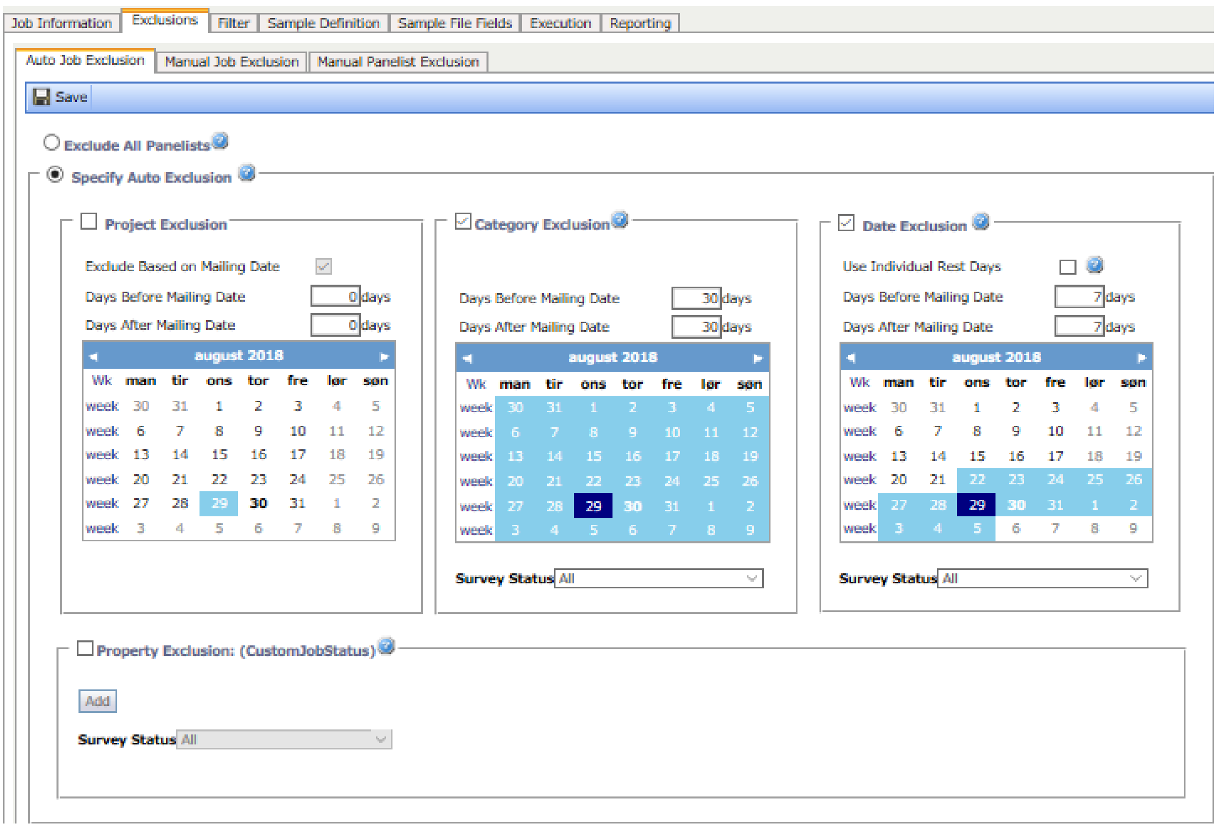


Figure 156 The Auto Exclusion tab

Select either:

Exclude all panelists - select this to exclude all panelists from all jobs. You can then go to the Manual Exclusion tabs and relax the exclusion for specific jobs. Use this function if you want to send for example a follow-up survey to the same panelists as for an earlier survey.

Or:

Specify Auto Exclusion - select this to exclude panelists using Project, Category, Date and/or Property Exclusion, then set up the exclusions as required.

- **Project Exclusion** - select to exclude panelists based on the project which the sample is uploaded to. So if you enable project exclusion on a job, it must be connected to a survey. Then when running the sample, you can either:
    - Exclude all panelists who have previously been uploaded to that survey. There is then no risk of a panelist being uploaded to the same survey twice.
    - Exclude all panelists who have been uploaded to that survey and has mailing date in a particular period before and after the current job's mailing date. There is then no risk of a panelist being uploaded to the same survey twice in that period.
- **Category exclusion** – excludes potential panelists if they have the selected status and have been used in a sample for a survey of the same category within the specified dates.
- **Date exclusion** – excludes potential panelists if they have the selected status and have been used in a sample for any survey within the specified dates. The panelist may have been invited to participate in a survey, they may or may not have responded to that invitation, or they may have already been included in a different sample for a survey that is still being planned.

  In both cases the exclusion dates are applied around the Mailing Date – the date on which you plan to email the survey invitations to those panelists who are finally selected. The darker shaded date is the selected Mailing Date (set at the top of the tab (see How to Set the Mailing Date on page 132 for more information), while the lighter shaded area covers the days selected in the Days Before and Days After fields for the appropriate calendar.
- **Property exclusion** – a Property Definition (see The Property Definitions Tab on page **Error! Bookmark not defined.** for more information) can be activated so it can be used in the exclusion. This excludes potential panelists if they have the selected property and Survey Status. Click **Add** to add a property definition (see How to Set the Property Exclusion Function on page 135 for more information).

7.1.2.2. The Manual Job Exclusion Tab

You may wish to include some potential panelists in your survey who have been excluded by the Auto Exclusion function, or you may wish to exclude panelists who have previously been involved with particular jobs, in addition to any exclusion generated by the Auto Exclusion function. The Manual Exclusion tab provides you with these possibilities.

The tab is divided horizontally into two lists:

- **Available Jobs** - the jobs currently registered in your database, which are available to be excluded or relaxed.
- **Manually Excluded and Included Jobs** – jobs selected manually from the Available Jobs list to be excluded or relaxed.

To simplify management, the lists are automatically divided into "pages" with 30 jobs on a page. Scroll through the current page using the scroll bar at the right side of the list, and move through the pages by clicking on the **Page** arrow buttons at the lower-right corner of the list.

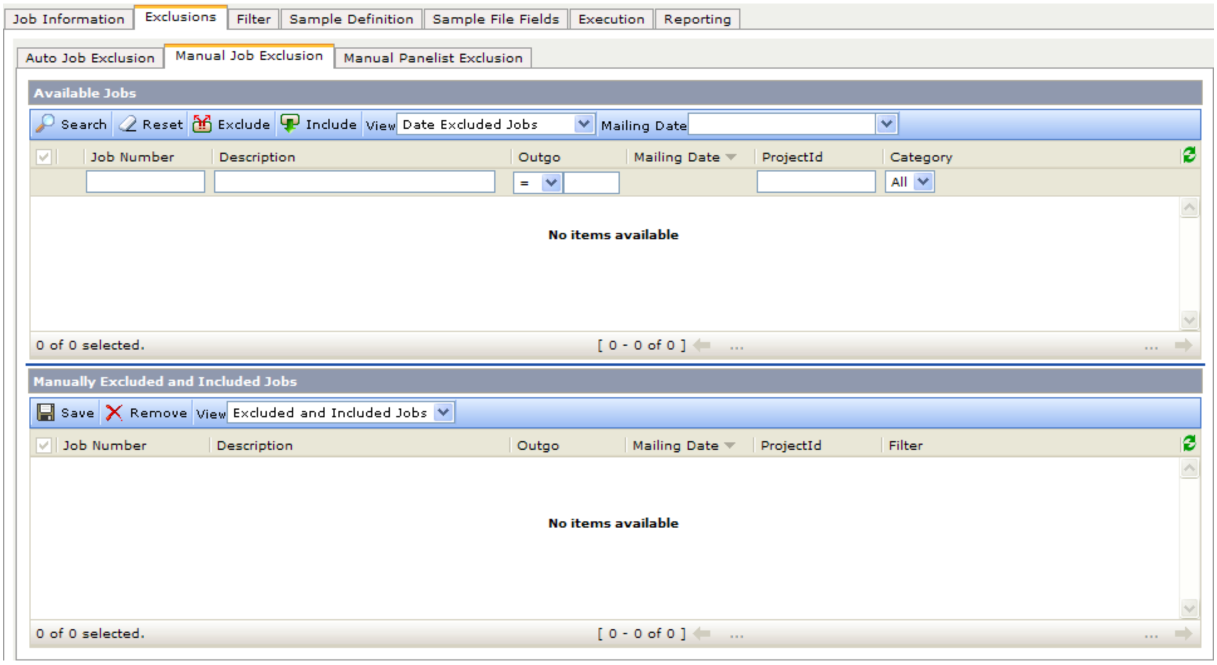


Figure 157 Example of the Manual Exclusion tab

7.1.2.2.1. The Job Filters

In an established company the list of registered jobs may run into thousands, and a search through the list for the one job that you wish to select for exclusion or relaxation could be time-consuming. Forsta Plus therefore provides you with a set of filters so you can reduce a long list to a manageable size.

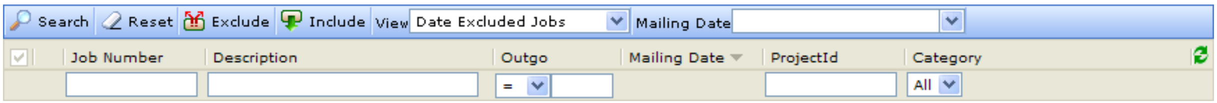


Figure 158 The joblist filter fields

The filters are as follows:

- **Job Number** – type in the number of the job you are looking for, then click **Search**. You can use the * character as a wildcard, and type in part of the number. For example, type in 123 to find all jobs where the job number starts with 123, such as job number 123456. Typing in *123 will find all jobs with the number 123 somewhere in the job number, such as job number 45123678.
- **Description** – type in the description of the job you are looking for, then click **Search**. You do not need to type in the entire description, and you can also use the * wildcard. For example, if the job you are looking for has the text “Forsta Customer Survey 1” in the description field, typing in confirm, ***sur**, or even just ***1** will find the job. However bear in mind that the simpler the search criteria is, the more jobs the search is likely to find.
- **Outgo** – allows you to search for jobs according to the number of respondents who were invited to participate in the survey. Click the drop-down arrow beside the operator field and select the required operator, then type the appropriate number into the field to the right of the drop-down arrow. When you are ready, click **Search**. For example, select the **<=** operator and type in **1000** to list all the jobs that were mailed to 1000 people or fewer.
- **Mailing Date** – allows you to search for jobs according to the date on which they were mailed. Click the drop-down arrow beside the operator field and select the required operator, then click on the calendar icon beside the field and select the date. When you are ready, click **Search**. For example, select the **<=** operator and a date to list all the jobs that were mailed on or before the selected date.
- **Project ID -** allows you to search for jobs according to the project ID of the project to which they are connected. Note that if you hover the mouse pointer over a project ID, the name of that project is displayed in a tool-tip.

- **Category** – this field lists the categories selected in the Job Information tab. Click the drop-down arrow to open the list and select the required category, then click **Search**.

Once you have found the job or jobs that you wish to use, you can exclude them or include them as required by clicking the appropriate button in the toolbar above the list. Click **Reset** to remove all filter criteria and reset the list.

7.1.2.3. The Manual Panelist Exclusion Tab

Use this tab to upload a list of panelists to be excluded.

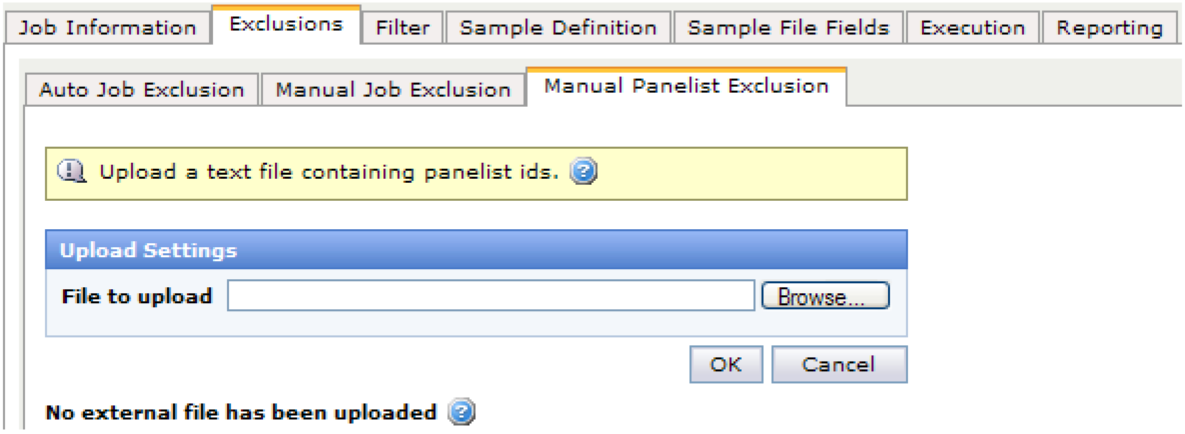


Figure 159 The Manual Panelist Exclusion tab

Click **Browse** to open a file selection window, find the file and select it, then click **OK**. Once you have uploaded a file, the name of the file you have uploaded and the number of panelists listed in the file is displayed on the tab. If required you can then click **Remove File** and confirm to delete it.

7.1.2.4. Procedures in the Exclusions Tab

7.1.2.4.1. How to Set the Mailing Date

The panelists that are selected for a survey are 'booked' in the system for a defined period from the moment that the job for which they have been selected is executed. The selected panelists are flagged in the database, and will be available to be included in jobs that are executed later according to the mailing dates and exclusion rules for those jobs. To set the mailing date for a job:

1. Go to the **Sample Management > Current Job** menu command.
2. Click the **Job Information** tab.
3. Click on the calendar icon to the right of the Mailing Date field.

   The calendar opens.

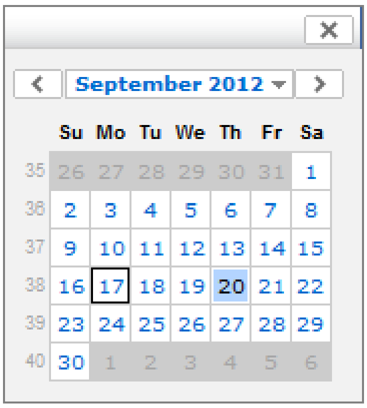


Figure 160 The calendar

4. Using the arrow buttons, browse to the appropriate year and month, then click on the desired date to select it.

   Note that today's date is outlined, and the selected date (if a date is already selected) is shaded. To close the calendar without selecting a date, click outside the calendar.

   When you click on a date, the calendar closes and the date is entered into the Mailing Date field. The time intervals you set in the Exclusions tab are then applied around the selected Mailing Date.

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

7.1.2.4.2. Exclude All Jobs

This check box is on the Auto Exclusion tab. Check this box to exclude all panelists for all jobs. You can then go to the Manual Exclusion tab and relax the exclusion for specific jobs. Use this function if you want to send for example a follow-up survey to the same panelists as for an earlier survey.

7.1.2.4.3. How to Set the Category Exclusion Function

Note: Go to the Job Information tab to select the category(ies) with which this job is to be associated.

If you wish to exclude potential panelists if they have been invited to participate in a survey with the same category(ies) as this survey, within a specified time period, proceed as follows:

1. Go to the **Sample Management > Current Job** menu command.
2. Click the **Exclusions** tab.

   The Exclusions window opens at the **Auto Exclusion** tab.

3. Check the Category Exclusion box.

   The Category Exclusion function is activated.

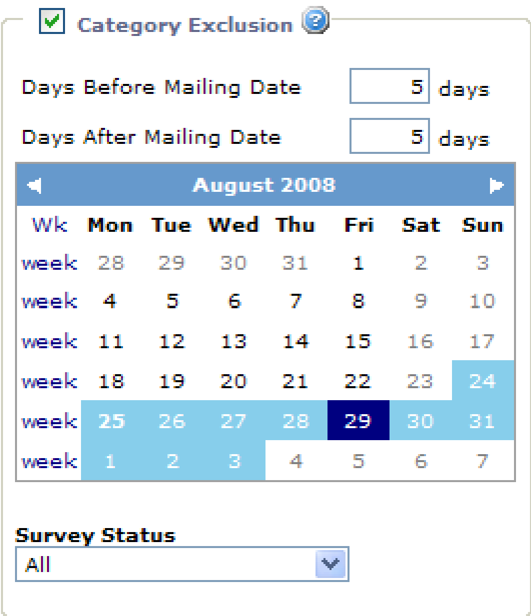


Figure 161 The Category Exclusion function

4. In the Days Before… and Days After… data fields, specify the number of days which, if a panelist has been included in another panel of the same category during this period, they are to be excluded from this survey.
5. Click the drop-down arrow beside the Survey Status field to open a list of the statuses and select the desired option.

   The options are:

- **Reserved** – excludes all potential panelists who are already reserved for other projects in the specified categories and date range.
- **Invited** – excludes potential panelists if an invitation has been sent to them to participate in a survey in one of the specified categories.
- **In Progress** – excludes potential panelists if they are in progress with a survey of the specified categories.
- **Completed** – excludes all potential panelists who have completed a survey in the specified categories within the specified date range.
- **Stopped by System** – excludes potential panelists who have been invited to participate in a survey in the specified categories during the specified time period, if those panelists have been prevented from completing those surveys by Forsta Plus.
- **All** – excludes all potential panelists who have been invited to participate in any survey of the specified categories during the specified period.

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

7.1.2.4.4. How to Set the Date Exclusion Function

If you wish to exclude potential panelists if they have been invited to participate in **any** survey within a specified time period around the mailing date for this survey, proceed as follows:

1. Go to the **Sample Management > Current Job** menu command.
2. Click the **Exclusions** tab.

   The Exclusions window opens at the **Auto Exclusion** tab.
3. Check the Date Exclusion box.

   The Date Exclusion function is activated.

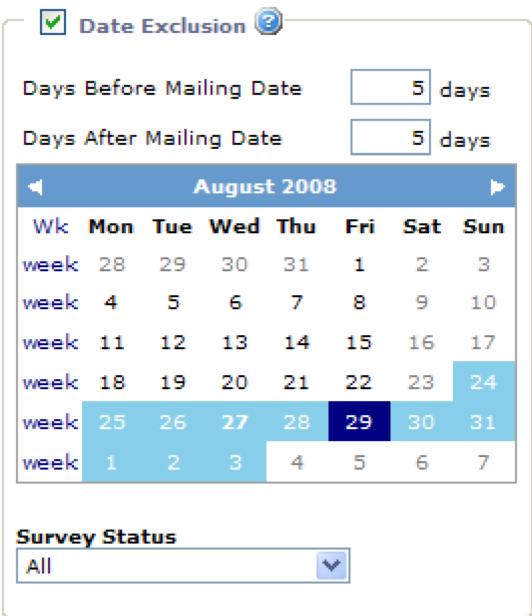


Figure 162 The Date Exclusion function

4. In the Days Before… and Days After… fields, specify the period during which, if a potential panelist has been included in any other panel, they are to be excluded from this panel.
5. Click the drop-down arrow beside the Survey Status field to open a list of the statuses.
6. Select the desired option.

   The options are:

- **Reserved** – excludes all potential panelists who are already reserved for other projects in the specified date range.
- **Invited** – excludes potential panelists if an invitation has been sent to them to participate in a survey within the specified date range.
- **In Progress** – excludes potential panelists if they are in progress with a survey within the specified date range.
- **Completed** – excludes all potential panelists who have completed a survey within the specified date range.
- **Stopped by System** – excludes potential panelists who have been invited to participate in a survey during the specified time period, if those panelists have been stopped from completing those surveys by Forsta Plus.
- **All** – excludes all potential panelists who have been invited to participate in any survey during the specified period.

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

7.1.2.4.5. How to Set the Property Exclusion Function

If you wish to exclude potential panelists who are or have been involved with jobs with particular properties, proceed as follows:

Note: This requires that the appropriate properties have been defined (see The Property Definitions Tab on page Error! Bookmark not defined. **for more information).**

1. Go to the **Sample Management > Sampling Settings** menu command.

   The Sampling Settings window opens.

2. Go to the **Property Definitions** tab.

   A list of the available Property Definitions is displayed, as shown in the example below.

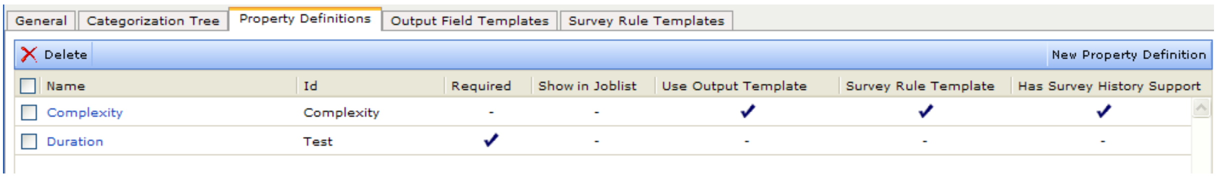


Figure 163 Example of the Property Definitions list

3. Click on the Name of the Property Definition you wish to use, to open the Property Definition page for that property.

   The page shown in the example below opens.

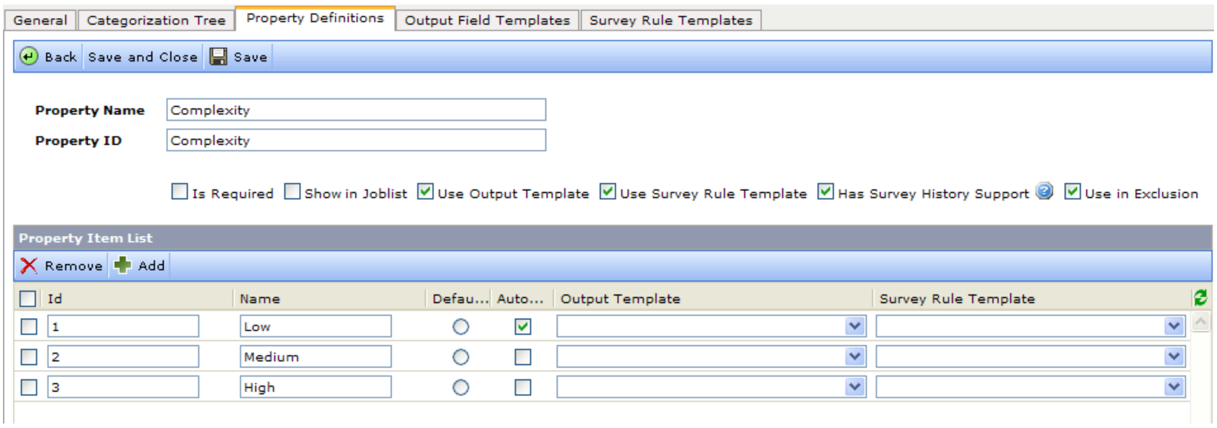


Figure 164 Example of the Definition page for a property

4. Check the **Use In Exclusion** box, and other boxes as required.

Note: Only one Property Definition can be used for exclusion in a job. Once the Use In Exclusion box is checked for a Property Definition, the box cannot be accessed for another definition.

5. Click **Save and close**.
6. Go to the **Sample Management > Current Job** menu command, then go to the **Exclusions** tab.
7. On the Auto Exclusion tab, check the **Property Exclusion** box.

   Note that the Property Definition you selected in step 3 above is now named beside the Property Exclusion box (arrowed in the figure below).

8. Click **Add**.

   A row is added to the exclusion list as shown in the example below.

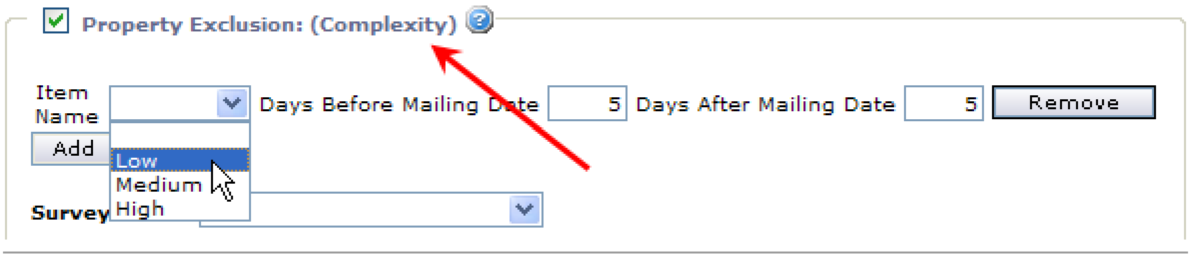


Figure 165 Example of the Property Exclusion list

9. Select the required item (in the figure above the Complexity property is selected, so the Item Name field lists the items registered for the Complexity property. In this case the Low item is being chosen).
10. Type values into the Days Before… and Days After… fields to set the date range for which the exclusion property is to be applied (the date range is applied about the Mailing Date).
11. If panelists conforming to the property exclusion should also have a specific status, then select the required status.

Note: You can add as many rows as required to the list, and set them up such that all the required combinations of items, dates and survey statuses are covered.

12. Save the changes.

7.1.2.4.6. How to Manually Exclude a Job

If you wish to exclude potential panelists who have previously been involved in a particular job, proceed as follows:

1. Go to the **Sample Management > Current Job** menu command.
2. Click the **Exclusions** tab.

   The Exclusions window opens at the **Auto Exclusion** tab.

3. Go to the **Manual Exclusion** tab.
4. Using the filters as necessary, find the appropriate job in the list.
5. Click in the job's checkbox at the left side of the job list to flag it.
6. Click the **Exclude** button in the Available Jobs toolbar.

   The job is moved down to the Selected Job list, and is colored pink for easy identification.

Note: You can exclude only those panelists in the job who have a specified Survey Status (you can specify more than one status).

7. Click the **…** button beside the Filter field to open the Filter dialog as shown below.

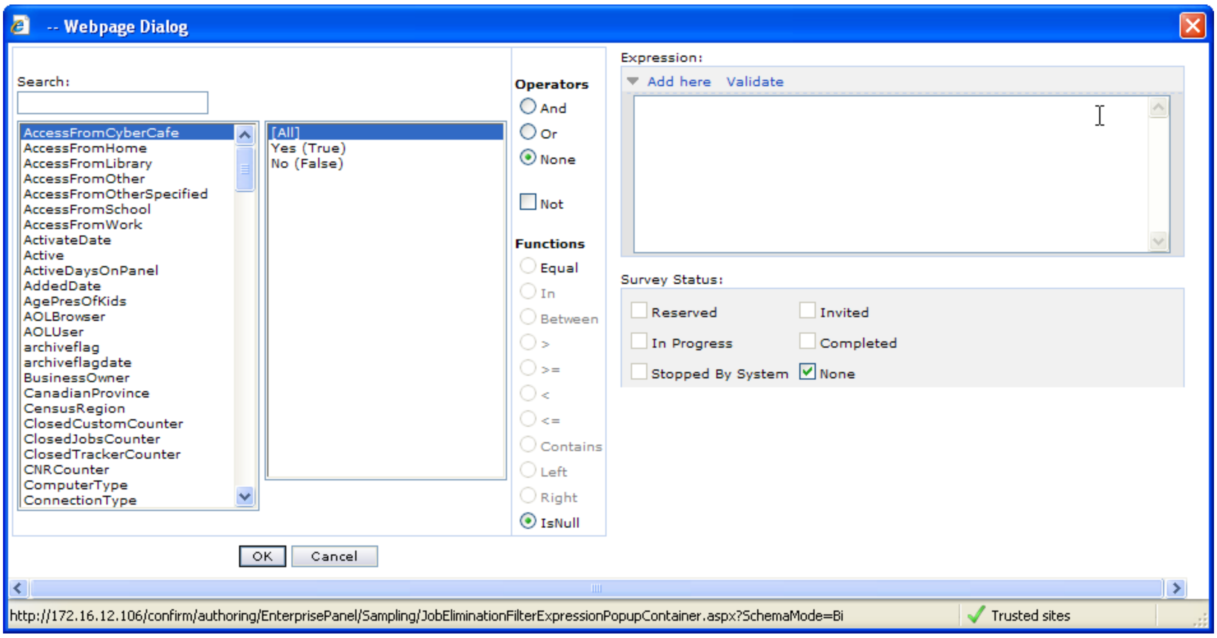


Figure 166 The Filters Web Page dialog

8. Create an expression as necessary (see The Filter Tab on page **Error! Bookmark not defined.** for more information).
9. Check the boxes for the statuses you wish to exclude (if None is selected, the other boxes are grayed out), and click **OK**.
10. The dialog closes and you return to the Manual Exclusion tab.
11. Click **Save** to save the changes.

Any potential panelists who satisfies the criteria in the selected job are now excluded from your current job. You can exclude several jobs at one time, and as many jobs as required.

7.1.2.4.7. How to Include an Automatic Exclusion

If you wish to include in your current job potential panelists who have been involved with a particular job that has been excluded by the general criteria set in the Auto Exclusion function, proceed as follows:

1. Go to the **Sample Management > Current Job** menu command.
2. Click the **Exclusions** tab.

   The Exclusions window opens at the **Auto Exclusion** tab.
3. Go to the Manual Exclusion tab.
4. Using the filters as necessary, find the appropriate job in the list.
5. Click in the job's checkbox at the left side of the job list to flag it.
6. Click the **Include** button in the Available Job toolbar.

   The job is moved down to the Selected Job list, and is colored green for easy identification.
7. Click **Save** to save the changes.

Any potential panelists who satisfied the criteria in the selected job are now included in your current job. You can relax the exclusion notice for several jobs at one time, and for as many jobs as required.

7.1.2.4.8. How to Deselect a Job

You may wish to deselect a job that you have previously selected for exclusion or relaxation. Proceed as follows:

1. Go to the **Sample Management > Current Job** menu command.
2. Click the **Exclusions** tab.

The Exclusions window opens at the **Auto Exclusion** tab.

3. Go to the Manual Exclusion tab.
4. Find the appropriate job in the Selected Jobs list.
5. Click in the job's checkbox at the left side of the job list to flag it.
6. Click the **Remove** button in the Selected Jobs toolbar.

   The job is removed from the Selected Jobs list, and is returned to the Available Jobs list.
7. Click **Save** to save the changes.

7.1.3. The Filter Tab

This tab is where you create the selection criteria expression that is the overall filter for the panelists. You can select criteria from the list and assemble them using the operators and functions, or if you have the required knowledge you can write the expression directly into the data field.

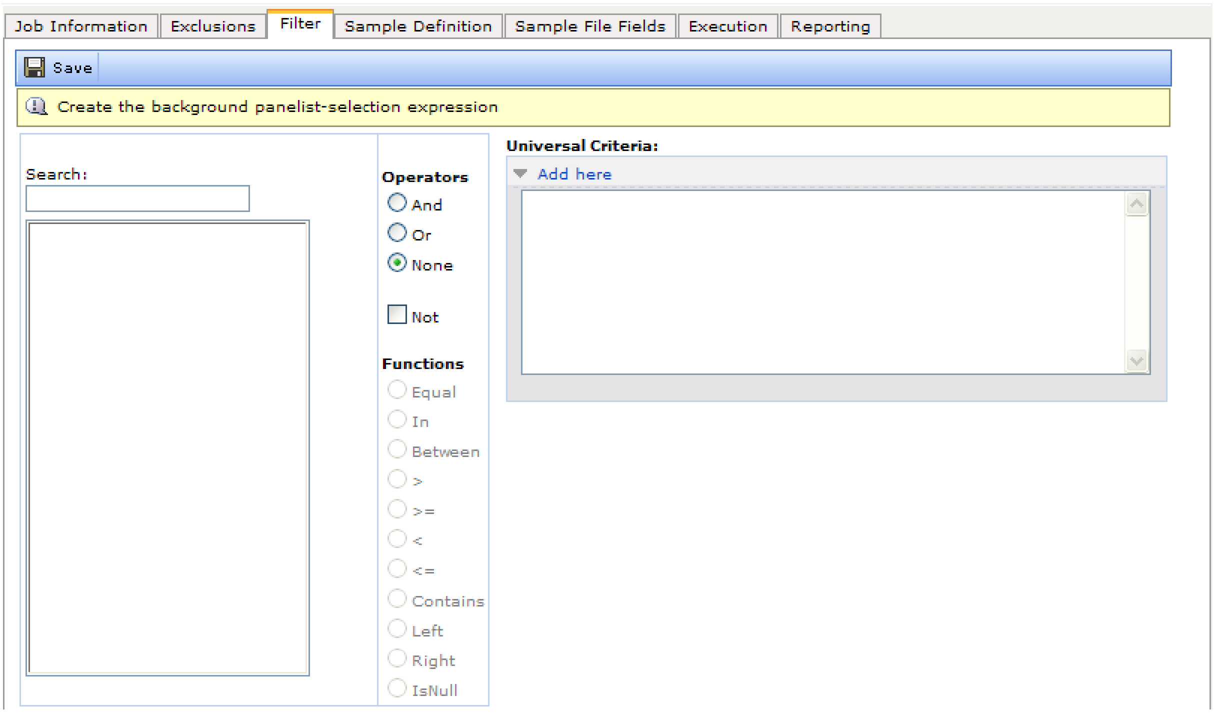


Figure 167 Example of the Universal Criteria tab

7.1.3.1. The Data Fields

- **Search** – type a character or string of characters into the Search field. As you type, Forsta Plus reduces the criteria list to show only those criteria that include that character or series somewhere in the criteria name.
- The Operators:
  - **And** – a conjunction operator to be used when more than one criteria must be satisfied. For example, the panelist must be male and must be married.
  - **Or** – a conjunction operator to be used when one or more criteria must be satisfied. For example, the panelist must have network access from home or from work.
  - **None** – this is not a conjunction operator. Use when adding the first criteria in the expression.
  - **Not** – the negative operator. Use for example when you want panelists who are not in banking though any other profession is acceptable.
- The Functions (these will be active depending on the criteria selected):

- **Equal** – use when you want the selected criteria to be equal to a specific value, for example when you want panelists of a specific age or you want the criteria to be Yes or No.
- **In** – use when the criteria value is to be one of a range or set of values.
- **Between** – use when you want the criteria to be between two values, for example between two dates.
- **>** (Greater than) - use when the criteria is to be greater than a specified value.
- **>=** (Greater than or equal to) - use when the criteria is to be greater than or equal to a specified value.
- **<** (Less than) – use when the criteria is to be less than a specified value.
- **<=** (Less than or equal to) – use when the criteria is to be less than or equal to a specified value.
- **Contains** – you can write an expression that looks, for example, for a certain combination of four characters anywhere in a line of text.
- **Left** – you can write an expression that looks, for example, for the first three characters in a line of text. In this case select Left as the desired string is to be on the left end of the line.
- **Right** – you can write an expression that looks, for example, for the last three characters in a line of text. In this case select Right as the desired string is to be on the right end of the line.
- **IsNull** - you can write an expression that looks for any null-codes in multi questions; i.e. answer options that have not been selected.
- **Any** - you can write an expression that looks for instances where any of a specified set of codes are present.
- **All** - you can write an expression that looks for any instances where all of a specified set of codes are present.

- Other data fields
  - **Text area** – type text as required into this field. The field is only accessible for certain pre-defined criteria.
  - **Paste area** – here you can paste in, for example, a list of values copied from a document.
  - **Number** – here you can type in numerical characters only. Use in conjunction with a Function (see above) when, for example, you want a criteria to have a specific numerical value. The field is only accessible for certain pre-defined criteria.
  - **End Number** – when the Number field is open, if you also select the Between function, a second numerical data field appears. This enables you to input a second number such that you can specify the criteria must have a value between the two given numbers.

7.1.3.2. Procedures in the Filter Tab

7.1.3.2.1. How to Create an Expression

Note: The procedures for creating expressions in the Filter tab and in the Sample Definition > Group Set tab > Expression Editor window are virtually identical. The only difference is that the Expression Editor window has Validate and OK buttons while the Filter tab has a Save button. The Filter tab is displayed in the main Forsta Plus window, so clicking Save checks the expression and saves the changes; it does not close the window. However as the Expression Editor function opens in a separate window, clicking OK checks the expression, saves the changes and automatically closes the window. If you then wished to make further changes to the expression, you would need to reopen the window before continuing. The Validate button is therefore included to allow you to check that the expression you have entered is valid before you click OK to save it and close the window. Therefore, if you are creating an expression in the Expression Editor window, click Validate to check the expression before you click OK to close the window.

1. In the left column, search for or browse to the criteria you wish to start your expression with, and click on it to select it.

   Any options that may apply to the criteria will be listed in the second column.
2. Select the radio button for the **None** operator (you cannot start an expression with the operators **And** or **Or**).
3. Select the appropriate function and type any text or values into the Text or Number fields as required.
4. Click **Add Here** (see the following figure) to add the criteria to the field.

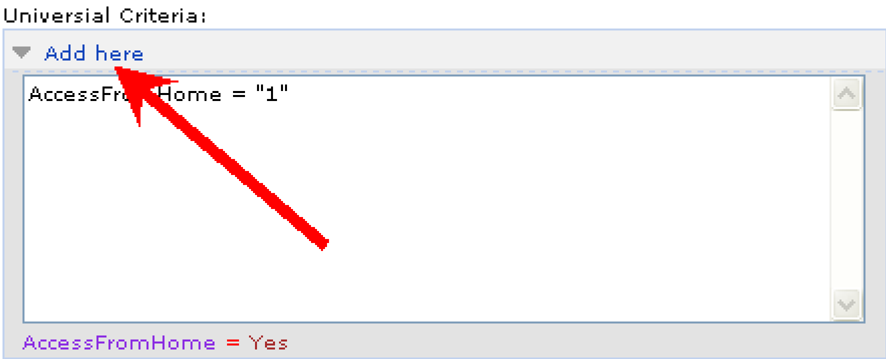


Figure 168 Adding criteria to the data field

Note that the coding is displayed in the white data field while the logical expression is “written” below the field.

5. Select and add criteria until you have the required expression.

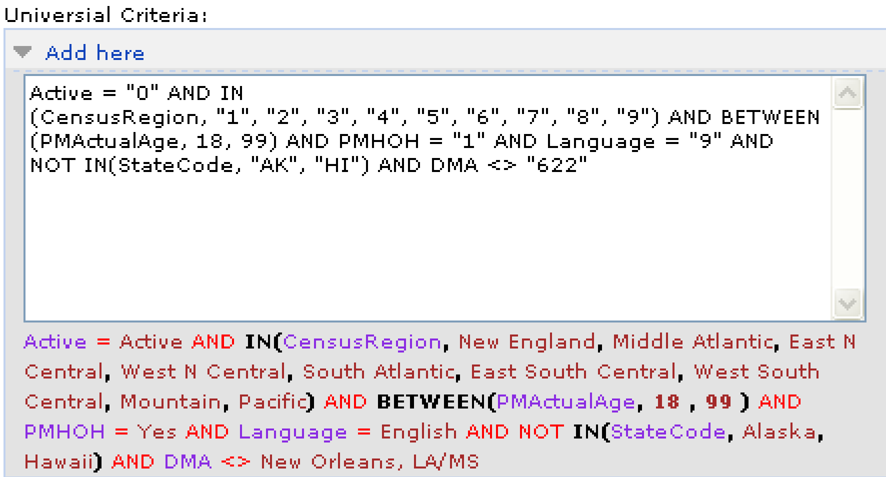


Figure 169   Example of a complete expression

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

7.1.4. The Sample Definition Tab

Particular surveys may need groups of respondents with different characteristics. For example, you might want to create one group to reflect the people in one city with that city’s male/female ratio and income levels, and another group for a different city with that city’s male/female ratio and income levels. The Sample Definition function allows you to create such groups.

To access this function, go to the **Sample Management > Current Job** menu command, then click the **Sample Definition** tab.

This tab is divided into two areas:

- **The hierarchy column** – displays the various sub-samples and group sets in a hierarchy.
- **The editor page** –displays the details of the item selected in the hierarchy column and enables you to edit those details.

In the hierarchy column, either right-click on an item then select **Edit** from the drop-down menu (see The Right-Click Menu on page 141 for more information), or double-click on the item, to open its editor page.

The following sections describe the editor pages for the various items in the hierarchy.

7.1.4.1. The Right-Click Menu

Place the cursor over an item in the hierarchy then click the right mouse button to open the right-click menu for that item. The menu commands available will depend on the type of item selected in the hierarchy. The full set of possibilities is listed below:

- **Edit** – opens the editor page for the selected item. You can also open the editor page for an item by double-clicking on the item.
- **Add Group Set (Below)** – creates a new Group Set below (within) the currently selected Sub Sample.
- **Add Group Set (After)** – creates a new Group Set after the currently selected Group Set.
- **Add Sub Sample (Below)** – creates a new Sub Sample below (within) the Sub Sample hierarchy.
- **Add Sub Sample (After)** – creates a new Sub Sample after the current Sub Sample.
- **Refresh** – refreshes the window to ensure all changes are displayed.
- **Expand All** – expands the entire hierarchy.
- **Collapse All** – collapses the entire hierarchy.
- **Duplicate** – duplicates the selected Sub Sample and its underlying Group Sets and places the new Sub Sample at the bottom of the hierarchy.
- **Delete** – deletes the selected item. You are asked to confirm the deletion.

7.1.4.2. The Sub Samples Folder Editor Page

In the hierarchy column, either right-click on the Sub Samples item then select **Edit** from the drop-down menu, or double-click on the item, to open its editor page.

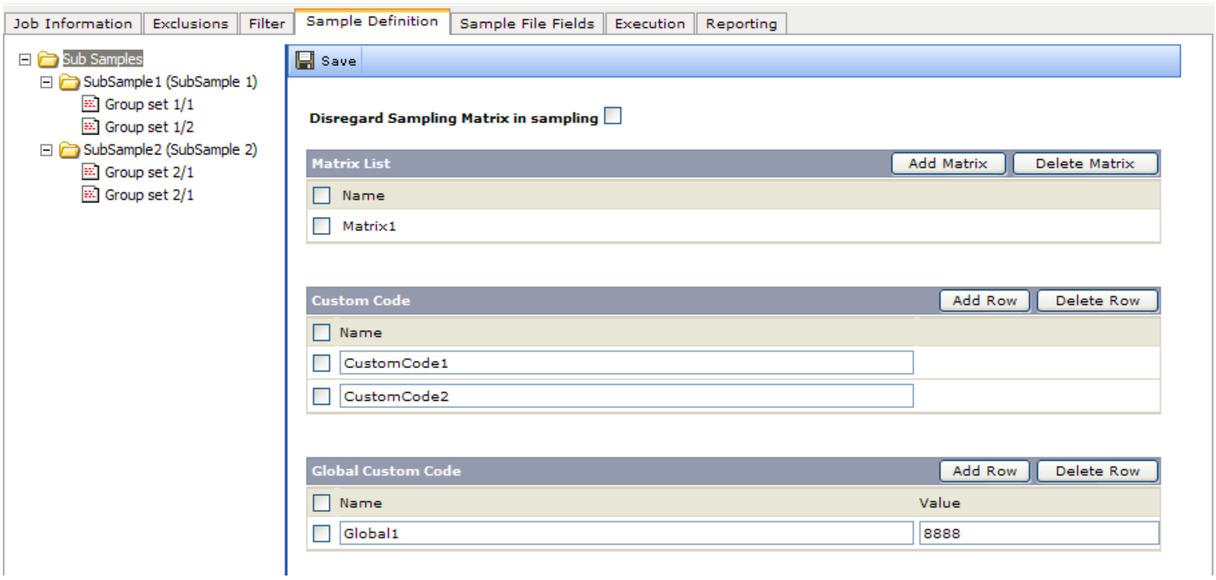


Figure 170 Example of the editing page for the Sub Samples folder

The "main" Sub Samples folder has the following data fields in its editing page:

- **Disregard Sampling Matrix...** - you can set up universal criteria with matrices etc. (see The Filter Tab on page **Error! Bookmark not defined.** for more information). Check this box to switch off the requirement to use matrices and only use the filters. Set the filters for each group, sub-sample etc. individually. This method of sampling is called Basic Sampling.
- **Matrix List** - this is the list of matrices that are available in the Matrix drop-down on the Sub Sample editor page (see The Sub Sample Editor Page on page 142 for more information). This allows you to create a small set of matrices from the complete list (which may run into hundreds), thereby simplifying the selection process and reducing the chance of errors. Click **Add**, then select the required matrices from the list.

- **Custom Code** - use this field to add custom codes to the job so you can use the codes later in the sub samples (see The Sub Sample Editor Page on page 142 for more information).
- **Global Custom Code -** use this field to add custom codes to the job that all in the sample will be given (this is similar to the default codes in the sub sample).

7.1.4.3. The Sub Sample Editor Page

In the hierarchy column, either right-click on a sub-sample folder then select **Edit** from the drop-down menu, or double-click on the folder, to open the folder's editor page.

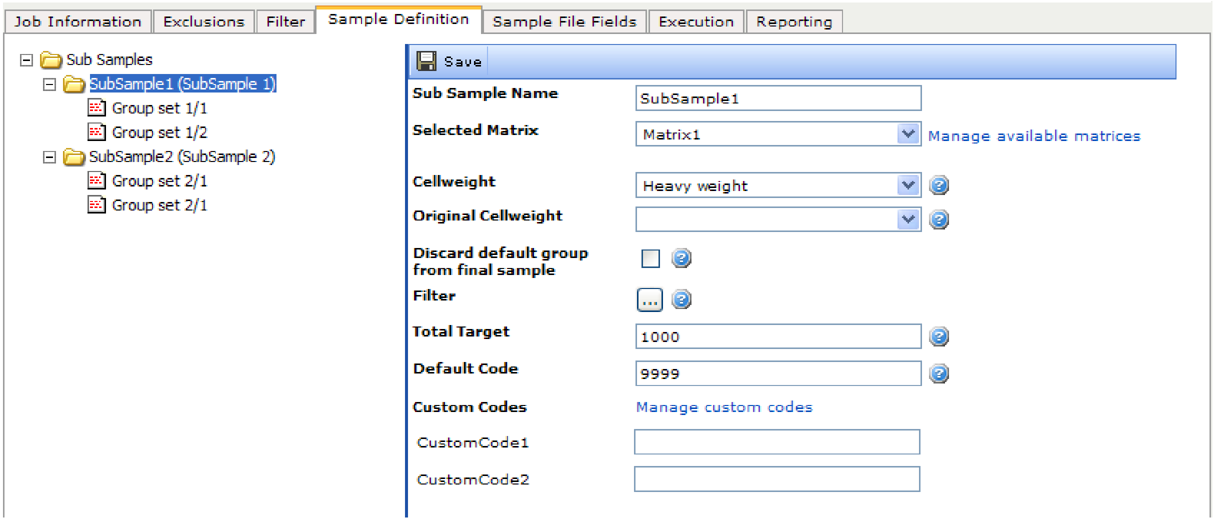


Figure 171 Example of the editing page for a sub sample folder

In the figure above, note the two "CustomCode" fields in the lower part of the page. These are created in the Sub Samples editing page (see The Sub Samples Folder Editor Page on page 141 for more information).

The Sub-folders have the following data fields in their editing pages:

- **Sub Sample Name** – the name for the sub sample.
- **Selected Matrix** – the matrix to be used to build up the group. Note that the matrix must be created first. The drop-down list will contain those matrices added to the Matrix List in the Sub Samples editing page (see The Sub Samples Folder Editor Page on page 141 for more information)
- **Manage Available matrices** - click this link to go to the Sub Samples Folder Editor Page to manage the matrices.
- **Use Dynamic Targets** - check this box if you wish to set the segment targets according to the composition of the underlying sampling population (BitStream set).
- **Apply Filters when Calculating Dynamic Targets** - check this box if you wish to include the sampling job's universal criteria and the sub-sample filter in the query to calculate the dynamic segment targets.
- **Cellweight** – select the cell weight to be used by the Sub Sample. See also Original Cellweight below.
- **Original Cellweight** – the customer might have specified a particular cell weight. However if not enough respondents can be found who satisfy the selection criteria, the cell weight might be changed to enable the job to be completed. In that case the cell weight actually used is given in the Cellweight field while the cell weight specified by the customer is given here.
- **Expression** – the filter used to select the respondents. Click the **…** button to open the Expression Editor window (see How to Create an Expression on page 139 for more information).
- **Total target** – this is the total number of panelists you wish to have in the sub sample Each group set in the sub sample is allocated its own target, and this total target is the total of the group set targets. Forsta Plus will attempt to fill this requirement while adhering to the selection criteria set in this and the other tabs.

Note: Forsta Plus performs two series of checks while creating a sample. The first check is performed using the criteria defined in the sampling job (using the Universal Criteria expression and exclusions), then a second check is performed to ensure any required percentages, weightings etc. are met. If Forsta Plus finds more than the required number of panelists that comply with the criteria then the program will randomly select the total required from those found. If not enough panelists complying with the criteria in the first check can be found, then an error message is displayed and the job will stop. If you wish to continue with the job you will then have to change some of the criteria. If the first check finds enough panelists but the second check cannot meet the required percentages, weightings etc. then Forsta Plus will try to complete the job by making adjustments to the weightings and percentages. Any changes will be notified in the job report.

- **Default Code** – you can define a code number for each group. If a respondent is found who satisfies the general criteria but who does not fit into a specific group, they will be allocated this default code.
- **<custom code>** - if a custom code is defined in the sub-sample (see Adding a Custom Code on page 144 for more information), then it will appear here. Add a value as required.
- **Weight Parameter** – this property is only used during concurrent sampling (see Concurrent Sampling on page 198 for more information), and is only visible on the Sub Sample Editor page if the Expected Return Variable box is set to a value other than None (see The General Tab on page 203 for more information). The property enables you to specify the accuracy of the sampling by using the probability that panelists are likely to reply to the survey. Enter a value between -1 and +1. A value of -1 will allow the sample to include panelists who have a low probability of replying. This will thereby result in a larger sample to ensure the required number of responses are returned. A value of +1 will restrict the sample to only those panelists who have a high probability of replying to the survey. This will thereby result in a sample closer in number to the required size.
- **Disable Balancing** – a particular matrix can be used for many jobs. Check this box if you do not want to use the cell weights applicable to the matrix.
- **Discard Default Group…** – check this box if you do not wish to use potential respondents who have been allocated the default code number (see above).

7.1.4.4. The Group Set Editor Page

In the hierarchy column, either right-click on a Group Set item then select **Edit** from the drop-down menu, or double-click on the item, to open its editor page.

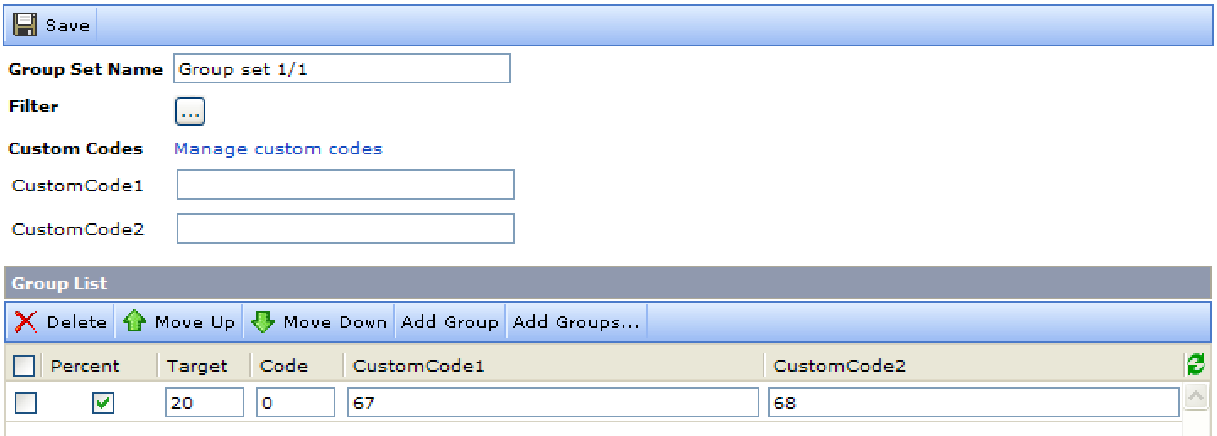


Figure 172 Example of the Group Set editing page

- **Group Set Name** - the name of the group set as it appears in the hierarch column. You can edit this name as required.
- **Filter** - if you wish to use a filter expression instead of matrices, click the ... button and create the expression here (see How to Create an Expression on page 139 for more information).
- **Custom code field(s)** - these are created in the Custom Code field in the Sub Samples editing page (see The Sub Samples Folder Editor Page on page 141 for more information).
- **Group List** - the list of groups in the Group Set. Click **Add Group** to create new groups (see How to Create a New Group Set on page 145 for more information).

7.1.4.5. *Procedures in the Sample Definition Tab*

Note: Double-click on an item in the hierarchy or right-click on it and select Edit, to open the item's editor page.

7.1.4.5.1. Adding a Matrix List

A panel can have a large number of matrices available for use. When you are setting up a group of sub-samples you may only need a small selection of the available matrices. Use the Matrix List functionality to build a "short list" of the matrices that are to be available for the sub-samples. These matrices will then appear in the drop-down list beside the Matrix field on the sub-sample editor page.

To add a matrix to the drop-down list, click the **Add Matrix** button and select the required matrix from the full list.

7.1.4.5.2. Adding a Custom Code

You can define one or more variables for which you can specify values in the Sub-Sample and Group levels. When you add a custom code, it appears in the sub-sample / group window with the name you have given it. If you add values to both the Sub-Sample and Group levels, then the Group level takes precedence.

To add a Custom Code:

1. In the Sub Samples Editor page (see The Sub Samples Folder Editor Page on page 141 for more information), click the **Add Row** button for the Custom Code field.

   A new row is added to the Custom Code list.

2. Type a name for the code into the Name field.

   Note that the name must include only alpha-numeric characters - no special characters or space.

3. Click **Save**.

   The new Custom Code will now appear in the Sub Sample Editor page (see The Sub Sample Editor Page on page 142 for more information)

7.1.4.5.3. Adding a Global Custom Code

You can define a variable and a value that will be given to all panelists who are selected for the sample file.

Type in the name for the global code and give it a value. If you wish to add more codes, click the **Add Row** button.

7.1.4.5.4. How to Create a New Sub Sample

Note: A rule that creates BitStream files from the panel database must be created before sub samples can be created (see How to Create a New Rule on page 95 for more information). For this rule, the Source must be Panel Database, the Target must be BitStream, and SurveyStatus must be selected in the Survey History Variables field.

1. Click on the **Sub Sample** icon after which you wish to create the new sub sample.
2. Click the right mouse button.

   The right-click menu opens.

3. Click **Add Sub Sample (After)**.

   A new sub sample is created after the current sub sample, and its details window opens as shown in the figure below.

4. Type the name for the sub sample into the Name field, and fill in the remaining details as appropriate (the Total Target must be specified).
5. Click **Save** to save the new sub sample.

Note: You can also select Duplicate from the right-click menu to make a copy of the currently selected Sub Sample and its underlying Group Sets.

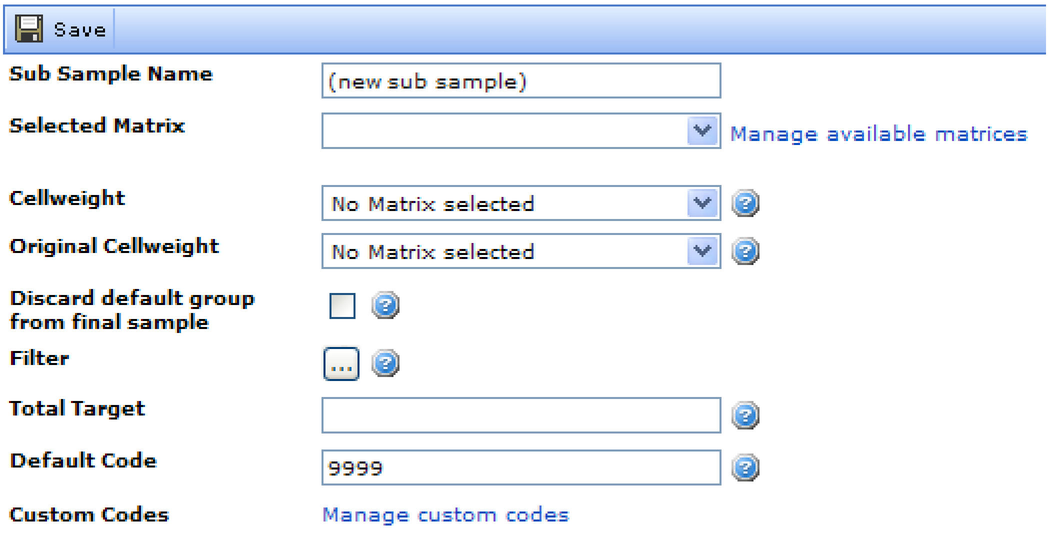


Figure 173 Example of a sub sample editor page

7.1.4.5.5. How to Create a New Group Set

The Group Set function allows you to create a number of groups with similar characteristics. Each Sub Sample in the hierarchy can contain any number of Group Sets, and each Group Set can contain any number of groups. Once a group set is created you can edit the characteristics for each group individually.

1. In the hierarchy column, right-click the Sub Sample into which you wish to add a new Group Set, then from the right-click menu select **Add Group Set (Below)**.

   The Group Set Editor page opens.

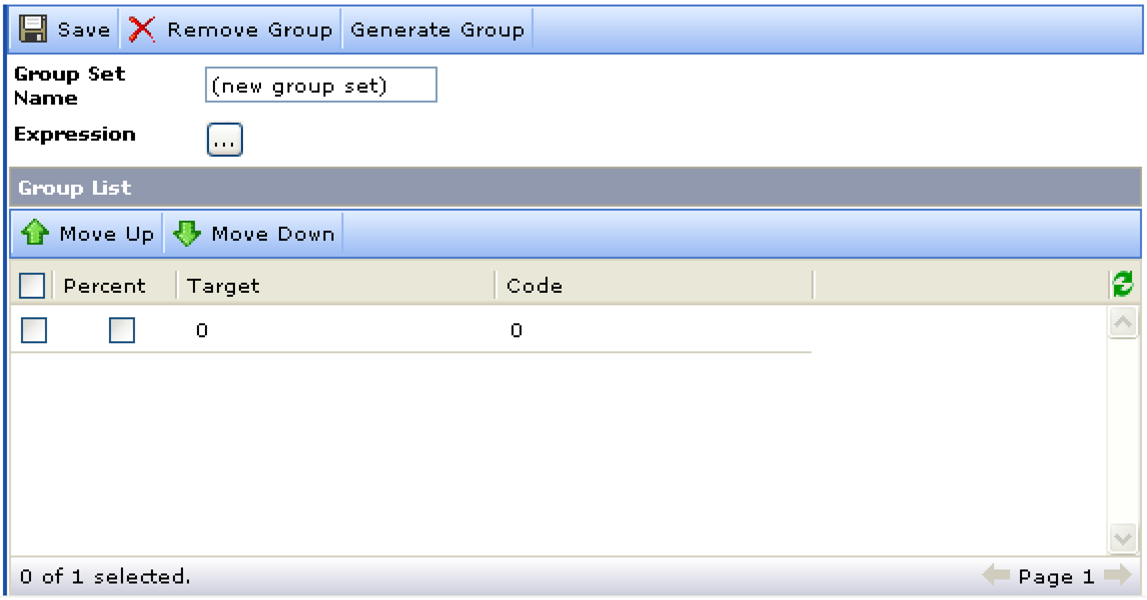


Figure 174 The Group Set Editor page

1. Type the desired name for the new group set into the Group Set Name field.
2. Click **Save** to save the changes and apply the name.

Note: The new Group Set already contains one undefined group. If you only require one group in the Group Set then you need only to fill in the details for this group. In this case, click in the data fields under Target and Code and type in the appropriate details – see below for the field descriptions.

3. If you wish to create more groups, click **Generate Group**.

   The Generate Groups window opens.

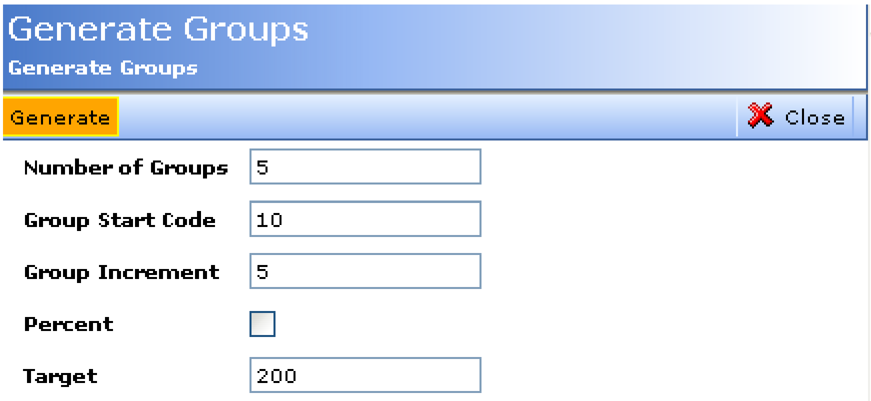


Figure 175 Example of the Generate Groups window

4. Fill in the details. The fields are as follows:
   - **Number of Groups** – the number of groups you wish to create in this operation.
   - **Group Start Code** – each group should have a code number. The number series will be created automatically but the system needs to know where to start. Type in here the first code number to be used.
   - **Group Increment** – The code numbers can be set to increase in increments, for example in steps of 10 (10, 20, 30 etc.). Type the required increment in here.
   - **Percent** – if you want to use a percentage of the total number of suitable people found by the filter instead of a set number, check this box. See also Target below.
   - **Target** – the total number of people you want to have in the group, or the percentage of the total number of people found by the filter. For example, if the filter finds 500 suitable respondents for the group and you type in 50 here, the system will randomly pick out 50 people. If you type in 50 here and also check the Percent box then the system will randomly pick out 50% of 500 = 250 people.
5. Click **Generate** to create the new groups.

   The new groups are added to the Group Set list.
6. Click **Save** to save the changes.

   The figure below shows the Group Set editor page with the new groups created according to the parameters set in the Generate Groups window in the previous figure.

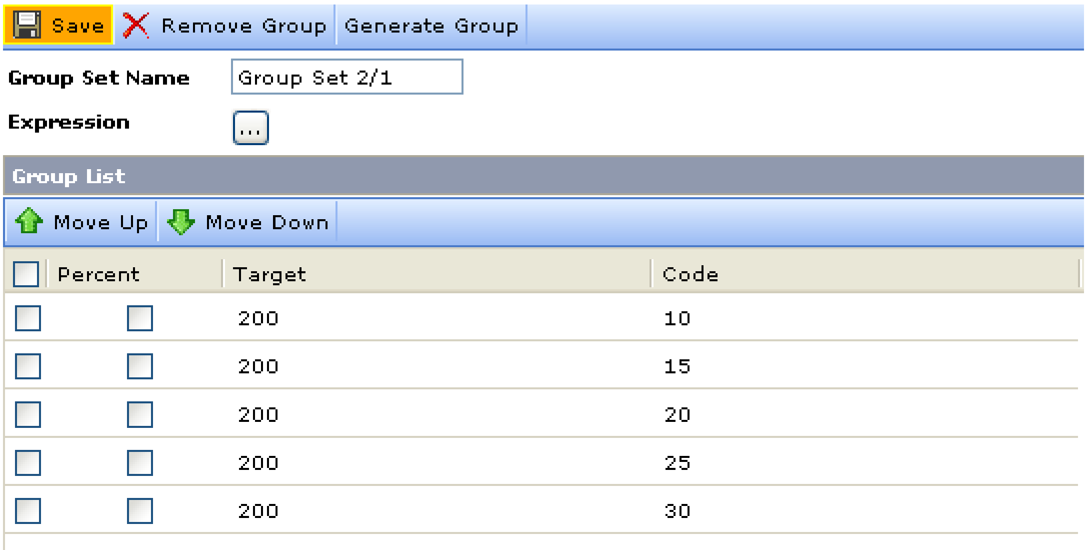


Figure 176 Example of the new groups

You can edit the group details as required. Click in the data field and make the necessary changes. On completion, save the changes.

7.1.5. The Sample File Fields Tab

When a person first agrees to make themselves available as a potential panelist, a lot of details about that person are registered into a database. The database is constructed as a table of rows and columns where each row contains the details of one person and each column contains the answers provided for one particular question.

The end product of the panel selection process is a text file containing a sample of the database table rows (panelists' details) as defined by the exclusion and selection criteria.

Some information, such as the panelist's ID number is always included by default. However you can use the Sample File Fields tab to specify which other columns of information about the selected panelists are to be included in the text file. The columns included here will define the contents of the results tables that will be available after the survey is completed. To add columns:

1. In the Available Fields list, select the columns you wish to add by clicking in the boxes beside the name.
2. Click **Add**.

   The selected columns are moved to the Selected Fields area.

   Click **Add All** to add all of the columns without having to select them individually. In the Selected Fields area, select a column and click **Remove** to return it to the Available Fields list.

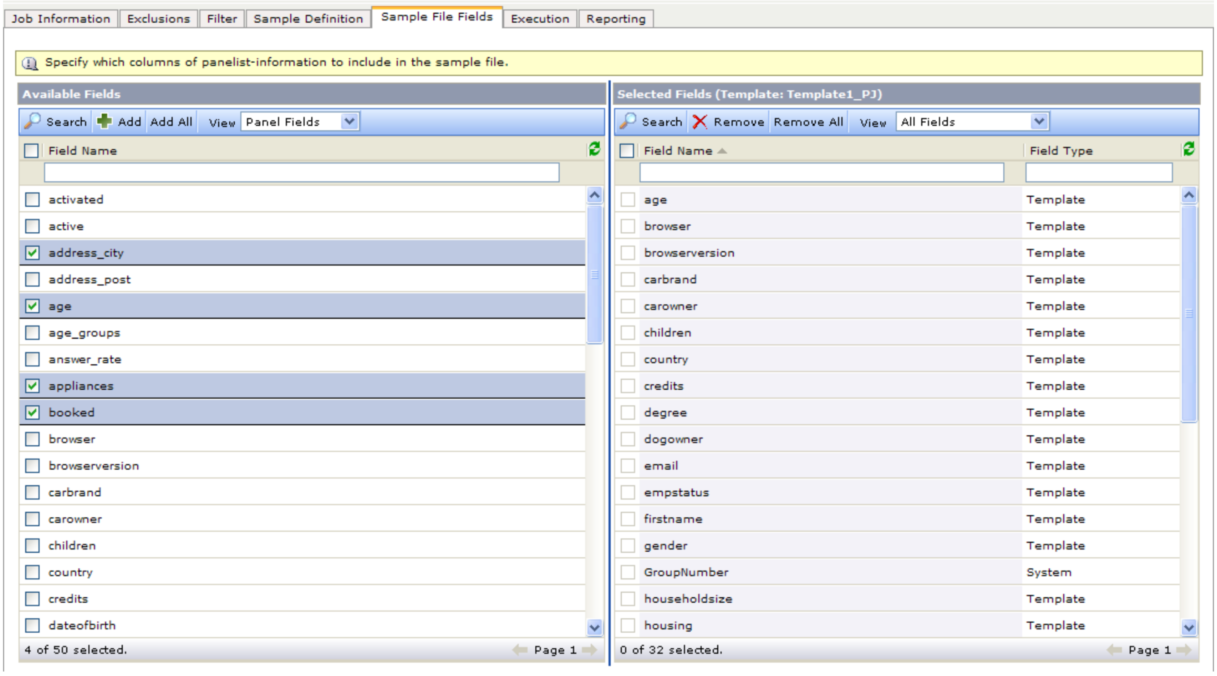


Figure 177 The Sample File Fields window

7.1.5.1. The Sample File Fields Tab Toolbar

The toolbar for the Sample File Fields tab is as shown below.

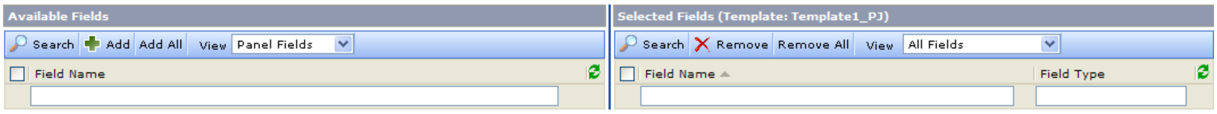


Figure 178 The Sample File Fields toolbar

- **Search** – starts the search function.
- **Add** – moves selected fields from the Available Fields list to the Selected Fields list.
- **Add All** – moves all the available fields from the Available Fields list to the Selected Fields list.
- **Field Type** – select the field type you wish to use. The options are:
- **Panel fields** – the fields pre-defined by the panel.
- **External fields** – additional fields made available by uploading a matchfile.txt file (see How to Upload a File on page 127 for more information).
- **Check box** – click in a check box to select the associated field. The uppermost check box selects all the fields.
- **Field name** – the header for the list of fields in the column.
- **Remove** – removes selected fields from the Selected Fields list.
- **Remove All** – removes all fields from the Selected Fields list.
- **View** - select from the drop-down list the field type you wish to view.

7.1.5.2. Procedures in the Sample File Fields Tab

7.1.5.2.1. How to Add Fields to the Selected Fields Column

1. In the Available Fields column click in the check boxes to select the desired fields.

   Selected fields are shaded blue for easy identification.

2. If for example the majority of fields are required, click in the check-box immediately below the **Search** button to select all the fields, then use standard Windows techniques and deselect those that are not required.
3. Click **Add**.

   The fields are moved to the Selected Fields column.
4. Click **Add All** to move all the fields to the Selected Fields column.

7.1.5.2.2. How to Remove Fields from the Selected Fields Column

1. In the Selected Fields column, click in the check box to select the field you wish to remove.

   Selected fields are shaded blue for easy identification.
2. Click **Remove**.

   The fields are moved to the Selected Fields column.
3. Click **Remove All** to return all the fields to the Available Fields column.

7.1.5.2.3. Searching for Field Names

If the Available Fields list is extensive, you may wish to perform a search to locate the field name or names you are looking for. Proceed as follows:

1. Type an appropriate combination of characters into the Field Name data field. Wildcards are not necessary.
2. Click **Search** or press the **Return** key on your keyboard.

   Forsta Plus will find and display all the instances of that combination of characters that are to be found in the Available Fields column.

   For example if you type **Zip** into the field and click **Search**, Forsta Plus will find all fields with the word Zip anywhere in the field name. Note that you do not need to type in complete words. For example, type **ll** into the field and click **Search** to find all fields with **ll** anywhere in the name.

   If after typing in the first search criteria the list is still long, you can perform a search through the first set of results by repeating the procedure.
3. Once you have found the required field, click in its check box on it to select it, then click **Add**.

   The selected field is moved from the Available Fields column to the Selected Fields column.

Note: You can select as many fields as you wish.

   To remove a field from the Selected Fields list, click in its check box to select it and then click the **Remove** button. The field is returned to the Available Fields list.

4. On completion, click **Save** to save the changes.

Note: The Save button flashes while the system contains changes that have not yet been saved.

7.1.6. The Execution Tab

Once you have set up all the selection criteria for the job, the job must be executed. This is done via the Execution tab.

To access the Execution tab, go to the **Sample Management > Current Job** menu command.

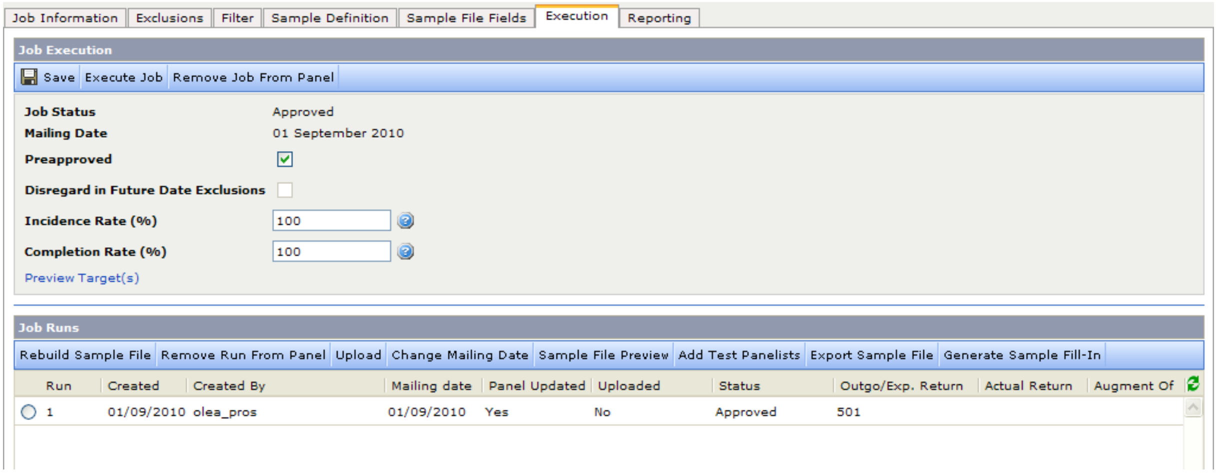


Figure 179 The Execution tab

The Execution tab contains two main areas:

- The Job Execution area - run the job you have set up in the other tabs.
- The Job Runs area - manage the runs that have been performed.

The procedures available on this tab include the following:

- You can test the job settings by performing a dummy run (the database is not updated and the panelists are not reserved).
- You can perform a “real” sample selection procedure with or without final reports.
- You can define when you want the execution job to be performed, and whether or not you want the job to be repeated at specified intervals.

Once the job has been executed, you can also:

- Upload the sample file into a project (see How to Upload the Sample File on page 162 for more information).
- "Undo" the sampling operation and return to sample to the panel (see How to Remove a Run from the Panel on page 160 for more information).
- Change the mailing date (see How to Change the Panel Mailing Date on page 163 for more information).
- View a snapshot of the panelists in the sample (see After the Job has been Executed on page 160 for more information).
- Add test recipients (Tester Templates) (see Tester Template List on page 201 for more information).
- Export the sample file (see How to Export the Sample File on page 164 for more information).
- Generate "Sample Fill-In". If a run does not find the required number of panelists using the specified weight set, this executes a new run for which weights are recalculated to generate the required sample (see How to Generate Sample Fill-in on page 160 for more information).

7.1.6.1. The Job Execution Area

This area shows general information about the job.

The toolbar contains a number of buttons and the area contains two check boxes.

- **Save** – saves changes to the tab. The button flashes while the tab has unsaved changes.
- **Execute Job** – starts the job execution process. Once the job is executed for the first time, additional buttons become available (see After the Job has been Executed on page 160 for more information).

Note: Once you have clicked the Execute Job button, it is deactivated while the job is running. This is to prevent “multiple-clicking” and the job being executed several times by mistake.

- **Remove Job From Panel** - click here if you have performed a number of sampling tasks and updated the panel, but then wish to "undo" ALL the panel updates (see How to Remove a Job from the Panel on page 161 for more information). This will free-up the panelists selected for the samples so they are available for other projects/samples. Note that this action removes ALL the runs from the panel. To remove one specific run use Remove Run From Panel in the Job Runs area of the tab (see How to Remove a Run from the Panel on page 160 for more information).
- **Preapproved** – Forsta Plus can be set up by the system administrator such that an executed job must be approved by the user's manager before it can be mailed. Check this box if you wish to avoid that procedure, for example for testing purposes.
- **Disregard in Future Date Exclusions** – check this box if you **do not** want the panelists selected by this job to be excluded from future samples by the time limits set in the Exclusions tab. Use this for example if you want to send an information email to a group of panelists without affecting their validity to be selected for future questionnaires.
- **Incidence Rate %** - here you can set the percentage of the panelists who receive the invitation to participate in the survey, who you expect will not be screened for some reason. I.e. the percentage who start to reply to the survey. For example, an Incidence Rate of 80% means that you expect 20% of the panelists to be screened. The value will be taken into account when the number of panelists selected for the sample is calculated.
- **Completion Rate %** - here you can set the percentage of the panelists who start to reply to the survey, who you expect will actually complete the survey. For example, an Completion Rate of 80% means that you expect 80% of the panelists who start answering the survey to actually complete it. This value will be taken into account when the number of panelists selected for the sample is calculated.

7.1.6.2. The Job Runs Area

The Job Runs area for the Execution tab displays the details of the sampling jobs that have been run.

The jobs are listed in the order they were performed with the most recent jobs at the top of the list. In the event the list is extensive, it will be divided into pages with 30 jobs on a page.

The area has the following buttons:

- **Rebuild Sample File** - regenerates the sample file to include new columns, but without selecting new panelists. A task pane opens to provide information while the recreation task progresses. On completion, click **OK** to return to the Execution tab. The **Rebuild Sample File** button is only available once the job has been executed. This could be used for example if you have created an sample file but need to add or change variables.
- **Remove Run From Panel** - click this button in the event you have performed a sampling task and updated your panel but then wish to "undo" the sample selection (see How to Remove a Run from the Panel on page 160 for more information).
- **Upload** - click to upload the sample file to a project (see How to Upload the Sample File on page 162 for more information).
- **Change Mailing Date** - change the mailing date for the project (see How to Change the Panel Mailing Date on page 163 for more information).
- **Sample File Preview** - provides an overview of the first 10 panelists in the sample file so you can check that the file is correct.
- **Add Test Panelists** - add test respondents to the database (see How to Add Test Panelists to the Database on page 164 for more information).
- **Export Sample File** - once you have created the sample file you can export it to another server or project (see How to Export the Sample File on page 164 for more information).

7.1.6.3. Procedures in the Execution Tab

7.1.6.3.1. How to Execute a Job

When executing a job you have several options available to you:

- You can test the settings by performing a dummy run (the database is not updated and the panelists are not reserved).
- You can perform a "real" sample selection procedure with or without final reports.

- If you create a sample file you can specify whether it is to be uploaded automatically into a project, and if so, which project.
- You can define when you want the execution job to be performed, and whether or not you want the job to be repeated at specified intervals.

Proceed as follows (note that the process is divided into sections depending on the selections you make):

1. In the **Current Job > Execution** tab, check the details presented on the tab and make the appropriate settings.
2. In the Job Execution (upper) section, click **Execute Job**.

   The Execute Job Properties dialog box opens as shown below. Use the options in this dialog to select the desired type of result.

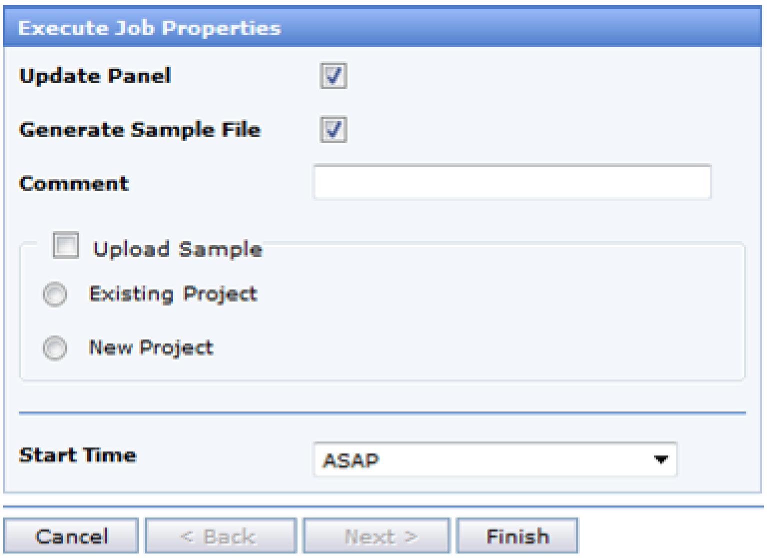


Figure 180 The Execute Job Properties dialog box

- **Update Panel** – ensure this box is checked if you wish to create a sample and update the database. This action will reserve the selected panelists for the job, ensuring they cannot be used for other jobs during the exclusion periods.

  Click in the box to deselect it if you wish to perform a “dummy-run” of the sample selection process. Forsta Plus will then apply all the expressions and exclusions, will check the system setup, and will present a report with all the appropriate information, but no changes will be made in the database and the panelists will not be reserved. Use this to test the job setup to ensure you get the required panel. You can perform as many dry-runs as you wish.

Note: If you execute the job with the Update Panel option selected, you can remove the panelist reservations from the database afterwards. To do this, click the Remove Job from Panel button that appears in the tab’s toolbar.

- **Generate Sample File** – ensure this box is checked if you require the sample file (the list of panelists reserved for the job) to be created. Note that you cannot Upload the sample if the sample file is not created.

Note: If you select to generate the sample file but not to update the panel database, then Forsta Plus will have no record that the selected panelists have been involved with this job. These same panelists may then be included in later jobs, and will not be excluded automatically by date and/or category.

Note: When the sample file is generated, each panelist is assigned a random mailcode value from 0 to 9. This code is used to determine which batch the panelist is to be included in for email invitations and reminders. When the number of batches is selected, the panelists are divided amongst the batches according to their mailcode value. If only one batch is to be used, the mailcode value is ignored and all panelists in the sample file are included. If for example the number of batches is set to 2, then panelists with mailcode values 0, 1, 2, 3 and 4 will be allocated to the first batch and those with values 5, 6, 7, 8 and 9 to the second batch. If the number of batches is set to 10, all panelists with mailcode 0 will be in the first batch to be sent, all panelists with mailcode 1 will be in the second batch to be sent etc.

- **Comments** – type any comments into the free-text data field.
- **Upload Sample** - check this box if you wish to upload the resulting sample file directly into a project. When checked, the two options below are activated. Note that if you select this option you must click **Next** and then make further selections (see The Upload Sample Properties Page on page 156 for more information).
    - **Existing Project** - select this option if you wish to upload the sample file to an existing project.
    - **New Project** - select this option if you wish to upload the sample file to a new project.
- **Start Time** – specify the time when the task is to commence. Click the down arrow to open a drop-down list of the options available:
    - **ASAP** – start the job as soon as possible. The job will be queued behind any other jobs awaiting processing in the database, and will be run as soon as the processor is available.
    - **Schedule for later execution** – select this option if you want to run the job execution procedure at a later time. If this option is selected, when you click **OK**, a dialog opens in which you can set the required time and date for the procedure to be run, and whether you want the job to be repeated. See the next section for details.

3. Select the required options and click **Next** or **Finish** as appropriate.

   If you have selected to upload the sample, when you click **Next** the Upload Sample Properties page opens (see The Upload Sample Properties Page on page 156 for more information). If you have not selected to upload the sample, when you click **Finish** the sample selection task begins as defined by the specified Start Time. While the task is running a Progress and Information window is displayed to keep you informed of progress, as shown in the example below.

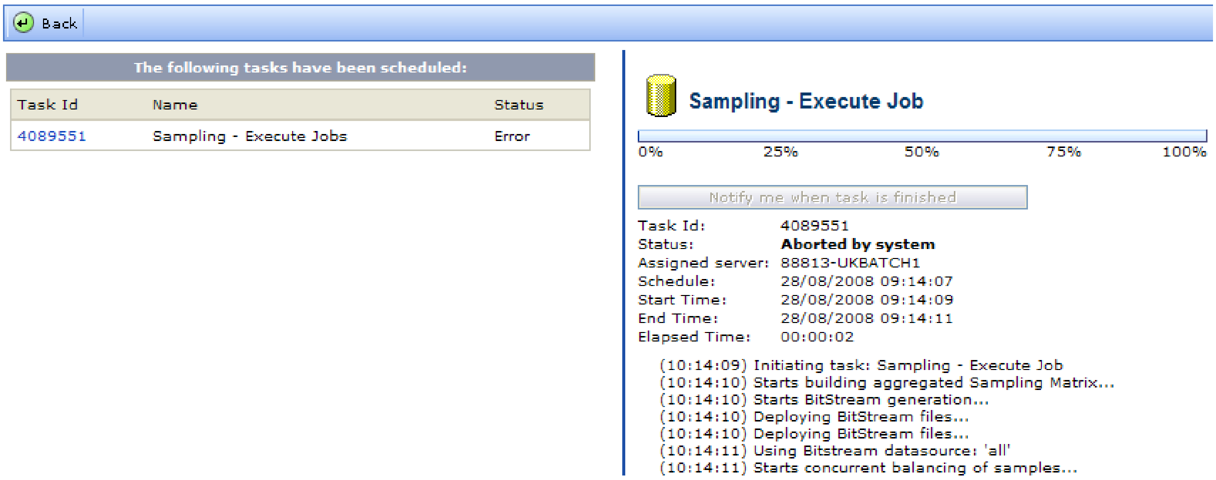


Figure 181 Example of the Execute Job task information page

   The task may take some time depending on the size of the panelist database and the exclusion criteria set. When the Execute function is completed, the text "Task Complete" appears at the bottom of the task list.

3. When the task has completed, click the **Back** button (see the figure above) to return to the Execution tab.

Once the task is complete, if the sample file has been created, you can upload the file into a Forsta Plus project. In this case, an **Upload** button appears in the Job Runs (lower) section on the Execution tab (see How to Upload the Sample File on page 162 for more information).

Note: Unless the Preapproved box on the Execution tab has been checked, the sample list you have created will now need to be checked and approved by a manager. The manager's Forsta Plus access will have been set up by the system administrator, and when the manager logs on and opens the job, the Execution tab will have two additional buttons; Approve and Decline. The manager will check the sample list and then click the appropriate button.

7.1.6.3.2. How to Set the Execution Time/Date for a Job

You may want a job to be executed at some time in the future. Forsta Plus allows you to input a time and date for the job to be executed, and define whether or not the job is to be repeated at intervals. Here you can also stop a job that has already been input, or reset it to start as soon as possible. Proceed as follows:

1. In the Execute Job Properties dialog box, go to the Start Time drop-down menu and select **Schedule for later execution**.
2. Click **OK**.

   The Execute Job page opens at the Recurrence tab.

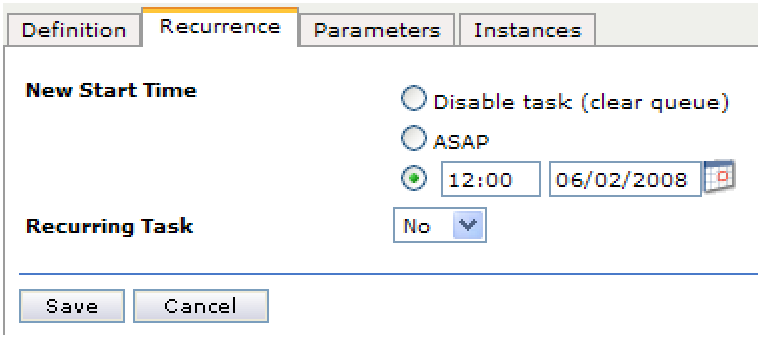


Figure 182 The Recurrence tab

The options are as follows:

- **Disable task** – select this radio button and click **Save** to disable the selected task. The task will not then run. The task is not deleted; you can access it later and restart it.
- **ASAP** – select this radio button and click **Save** to run the task as soon as possible.
- **Time and date fields** – set a time and date for when the task is to run, then click **Save**.
- **Recurring task** – click the down-arrow and select **Yes** if the task is to recur. Additional options then become available in the dialog box. See the next section for further details.

When you save the settings, the Recurrence tab changes to show the selected settings.

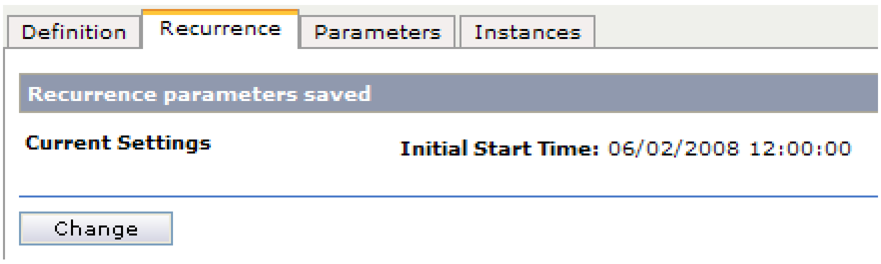


Figure 183 Example of the Recurrence tab when settings are saved

7.1.6.3.3. How to Set Up Recurring Tasks

You may want a job to be repeated one or more times during a defined period. If so, proceed as follows:

1. In the Recurrence dialog (see How to Set the Execution Time/Date for a Job on page 154 for more information), click the down-arrow beside the Recurring Task field and select **Yes**.

The dialog expands to display additional parameters – see the figure below.

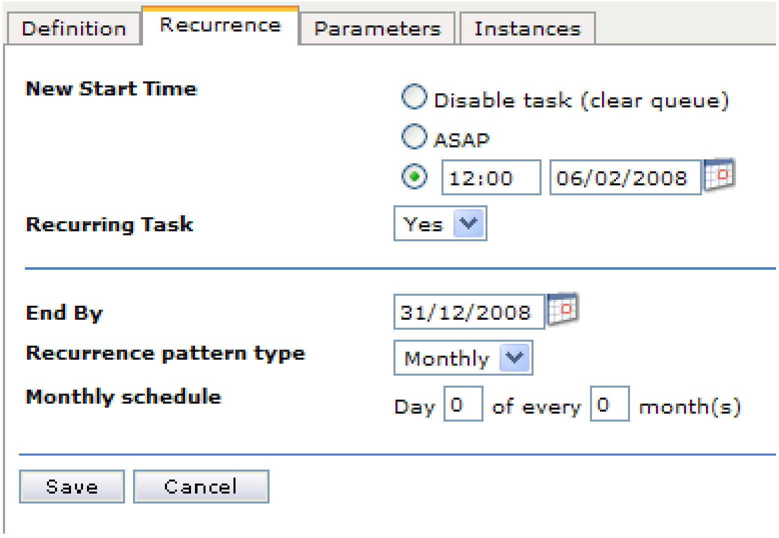


Figure 184 The dialog with the Recurrence function activated

2. In the New Start Time fields, set the time you want the first job execution to be performed.
3. In the Recurrence Pattern Type field, click the down-arrow and select the basic recurrence rate (hourly, daily etc.).

   The “Schedule” area below changes depending on the selection made here. In this area:

   - For hourly recurrences, type in the rate. For example, if you want the job to be executed every 4 hours, type **4** into the box. The job will be first executed at the date and time set in the New Start Time fields, then will be repeated every four hours.
   - For daily recurrences, type in the rate. For example, if you want the job to be executed every 3rd day, type **3** into the box. The job will be first executed at the date and time selected in the New Start Time fields, and will be repeated every third day.
   - For weekly recurrences, type in the rate and select the days of the week on which you want the job to be executed. For example, if you type **2** into the first box and click in the **Monday** and **Friday** boxes to select them, the job will be executed every second week; the first time on the Monday, the next time on the Friday, the next time on the Monday and so on.
   - For monthly recurrences, type in the day of the month and the rate. For example, if you want the job to be executed on the 10th day of every second month, type **10** into the Day box and **2** into the Month box.
4. In the Range of Recurrence fields, set the end-date and time for the recurrences. No recurrences will be performed after this date and time.
5. Click **Save** to save the settings.

   The Recurrence tab changes to display the settings.

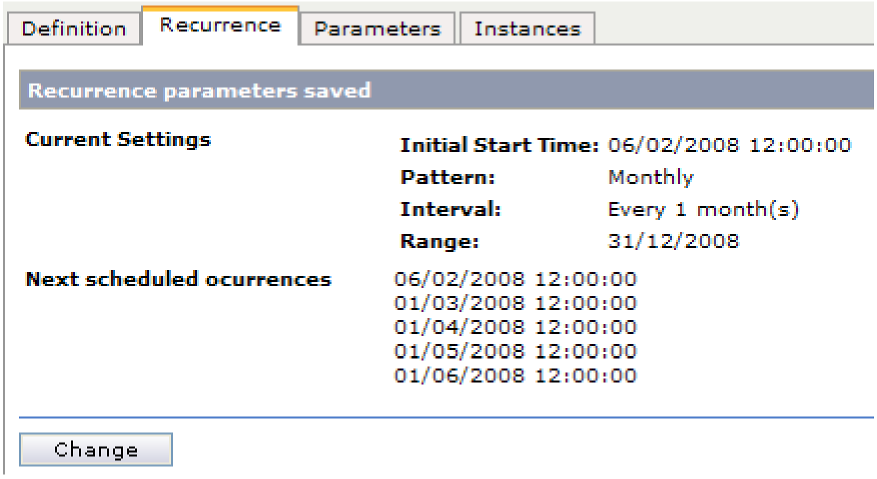


Figure 185 The Recurrence tab showing an example of recurring settings

Note: If you go out of the dialog before saving the settings, the settings will revert to their default values.

Once you have saved the settings, you can go back at any time to change them or halt the task. To do this, click **Change**(see How to Change the Execution Settings on page 159 for more information).

7.1.6.3.4. The Upload Sample Properties Page

The Upload Sample Properties page is where you select the project to which the sample is to be attached. When executing a job (see How to Execute a Job on page 151 for more information), if you select the **Upload** option and click **Next** in the resulting dialog, the Upload Sample Properties page opens as shown below.

Note: If the sample contains text variables that are longer than 255 characters, those variables will be truncated automatically to 255 characters when they are uploaded to the survey.

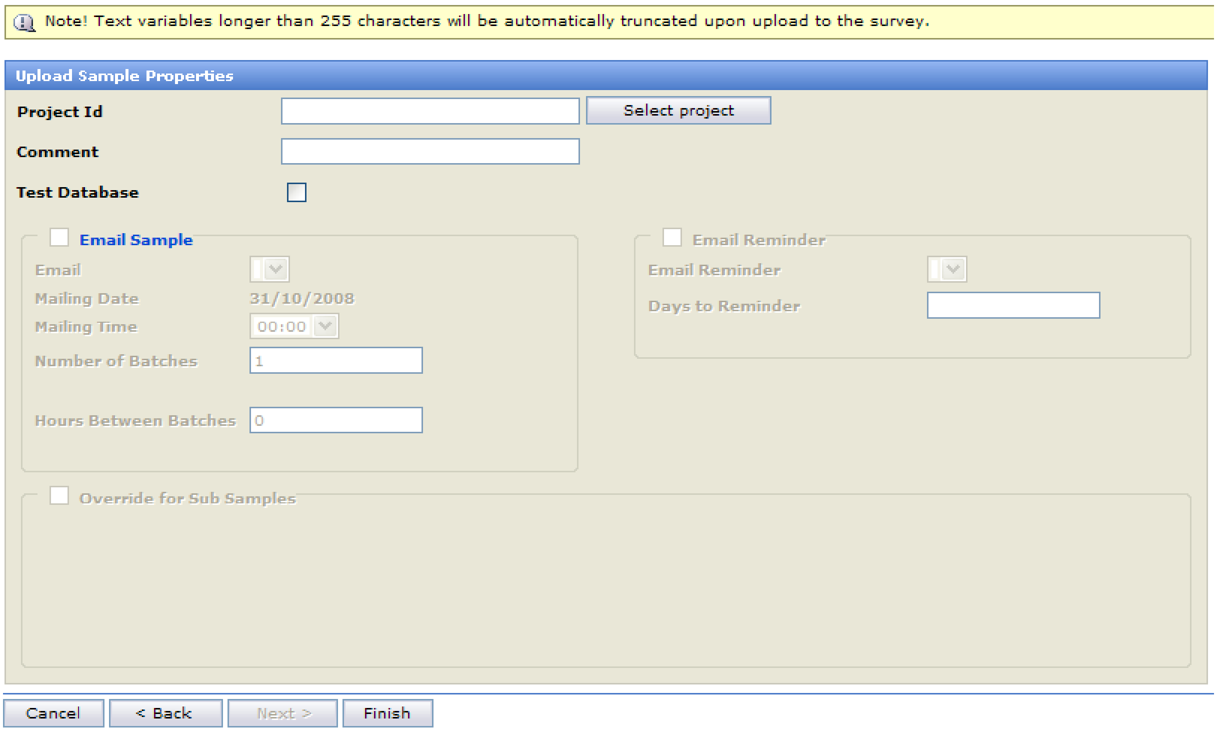


Figure 186 The Upload Sample Properties page

1. Click **Select Project**.

The Project List window opens.

2. Select the required project from the list and click **OK**.

   The window closes and the selected project Id is added to the field. Note that in the event the list is extensive, you can search for the required project using the various search criteria available.

3. Type a comment into the Comment field as required.

4. Click in the Test Database box to select it if you wish to attach the resulting panel to the project's Test database.

   If the selected project contains an email, when you select the Email Sample box the email properties become active.

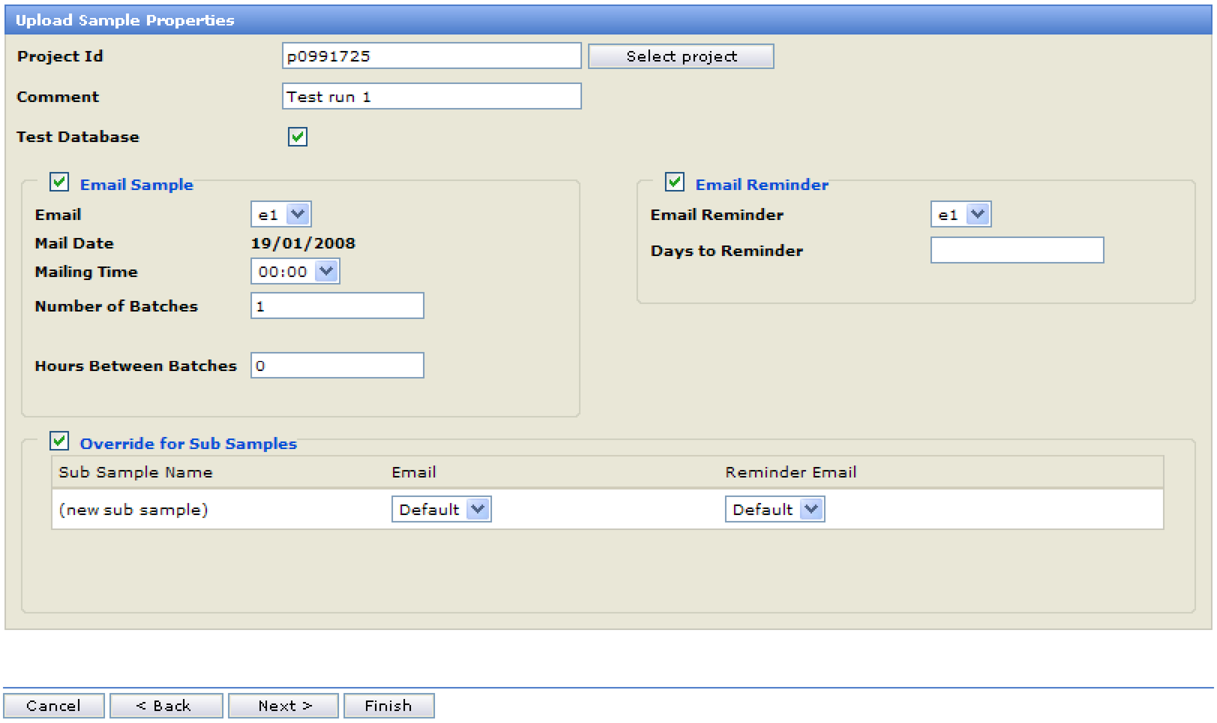


Figure 187 The Upload Sample Properties page with the email section active

- **Email** - if the project includes more than one email, click the down-arrow and select from the list the email that is to be used. Note that any email nodes used in the panel will also be available here.
- **Mail Date -** the date on which the email is to be sent (see How to Set the Mailing Date on page 132 for more information).
- **Mailing Time** - the time at which the email is to be sent. If a large number of emails are to be sent and the transmission is divided into batches, this is the time the first batch is sent.
- **Number of Batches -** if a large number of emails are to be sent and you wish to divide the transmission into batches, type the number of batches here.
- **Hours Between Batches** - specify the number of hours between each batch of emails that is to be sent.
- **Email Reminder -** if you wish to send a reminder email to those panelists who do not respond to the questionnaire, check the box. The two options then become active.
- **Email Reminder** - if the project includes more than one email, click the down-arrow and select from the list the email that is to be used.
- **Days to Reminder -** type in the number of days after which the reminder email is to be sent.

5. Make the settings as required.

6. If you have several sub-samples and you wish to send different emails to different sub-samples, check this box. The Sub Sample list below becomes active. Here you can select the primary and reminder emails for each sub sample.

7. On completion, click **Next**.

   The Augment Sample Properties page opens (see The Augment Sample Properties Page on page 158 for more information).

7.1.6.3.5. The Augment Sample Properties Page

When you click **Next** on the Upload Sample Properties page (see The Upload Sample Properties Page on page 156 for more information), the Augment Sample Properties page opens as shown below.

Use the Augment Sample functionality to ensure you receive the required number of completes to your questionnaire. If for example you need 1000 completes, you will probably start by creating a sample of 1000 panelists. However there is a good chance that not all of the panelists will reply, leaving you with perhaps only 600 completes. You can therefore set up the Augment functionality such that after a specified period, additional samples are created so that you will receive the desired total of 1000 completes.

The Augment functionality will wait a specified period (Days to First Augment) after the initial mailing date, and then count the number of completes that have been returned by the original sample. It will then check whether that number is within the Augmenting limits (Lower and Upper Limits), and if so will select a new sample calculated to provide the required "top-up" of completes. If the Number of Augments is set to anything other than 1, the system will then wait a further specified number of days (Days Between Augments), before repeating the process. The process will be repeated until either the required number of completes is received or the specified number of augments is performed.

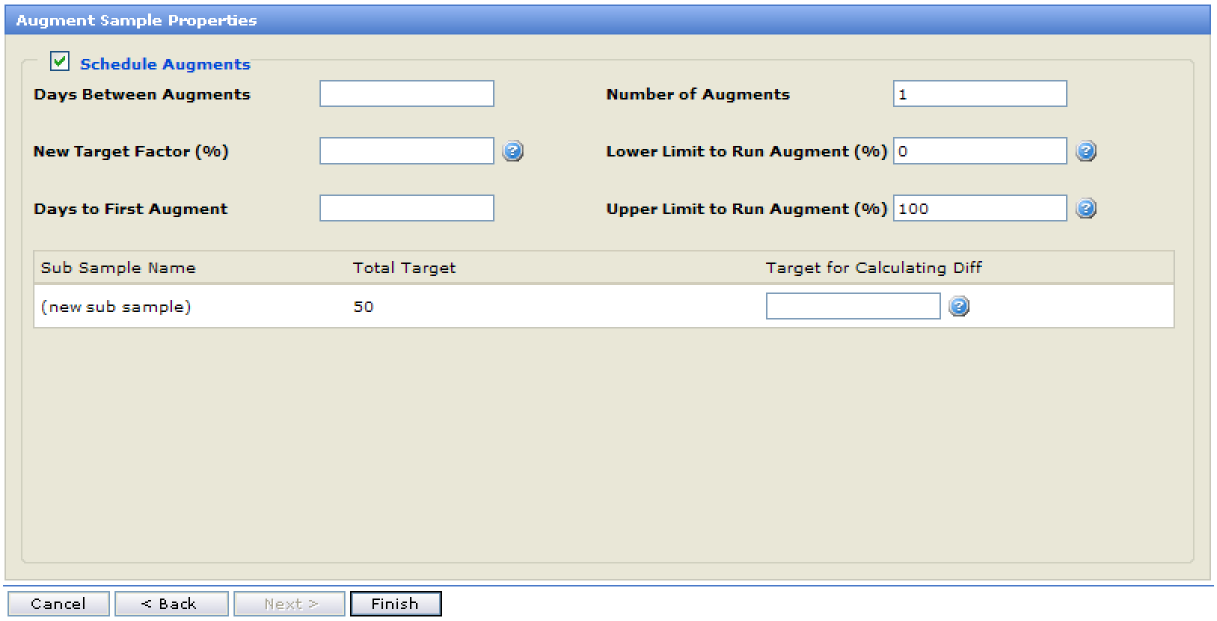


Figure 188 The Augment Sample Properties page

- **Days Between Augments** - the number of days that are to elapse between each augmenting task.
- **Number of Augments** - the number of augmenting tasks that are to be run, if required.
- **New Target factor** - the factor in percent by which the difference between the original total target and the actual return is multiplied. The calculation will be run for each sub sample, and the new total target will be distributed to the groups according to the original ratio. The calculation is: New Total Target = (Total Target - Actual Return) * New Target Factor
- **Lower Limit to Run Augment** - the percent difference between the original target and the actual return must be higher than this limit for the augment to run. The limit is per sub sample.
- **Days to First Augment** - the number of days after the mailing date when the first augment task is to run.
- **Upper Limit to Run Augment** - the percent difference between the original target and the actual return must be lower than this limit for the augment to run. The limit is per sub sample.

- **Target for Calculating Diff.** - the target used for calculating the difference between the target and the actual return instead of the original total target. The calculation is:

  New Total Target = (Target for Calculation Diff - Actual Return) * New Target Factor.

7.1.6.3.6. How to Change the Execution Settings

Once a job execution task is set up and activated, the job will be listed in the Tasks list. If you wish to make changes to the task, execution time or recurrence sequence, proceed as follows:

1. In the Quick Access pane, go to the **Tasks** menu command.

   The Tasks window opens listing all the tasks that are scheduled to run, with the task to be performed first at the top.

Note: The list will include tasks for all projects to which you have access. To restrict the list to the tasks for one project, type the project ID into the appropriate search field and click Search (see The Project Tasks Page on page 29 for more information).

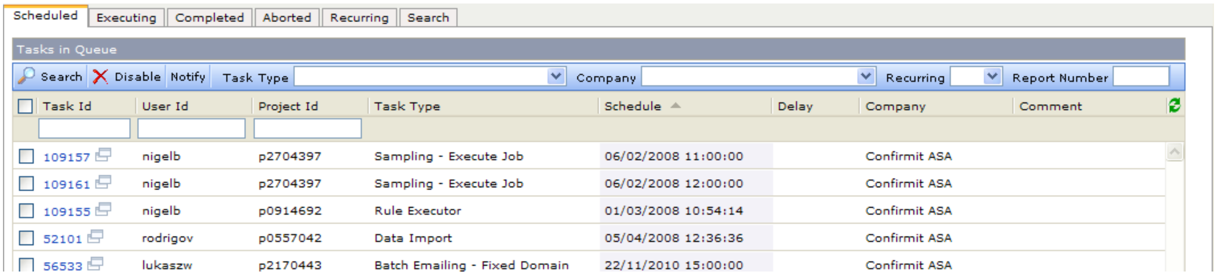


Figure 189 Example of a Task List

2. Click the blue Task ID link for the task you wish to change.

   The Execute Job window opens for that job, showing the instances for the job.

3. Go to the Recurrence tab, and click **Change**.

   The tab changes to show the current details of the job.

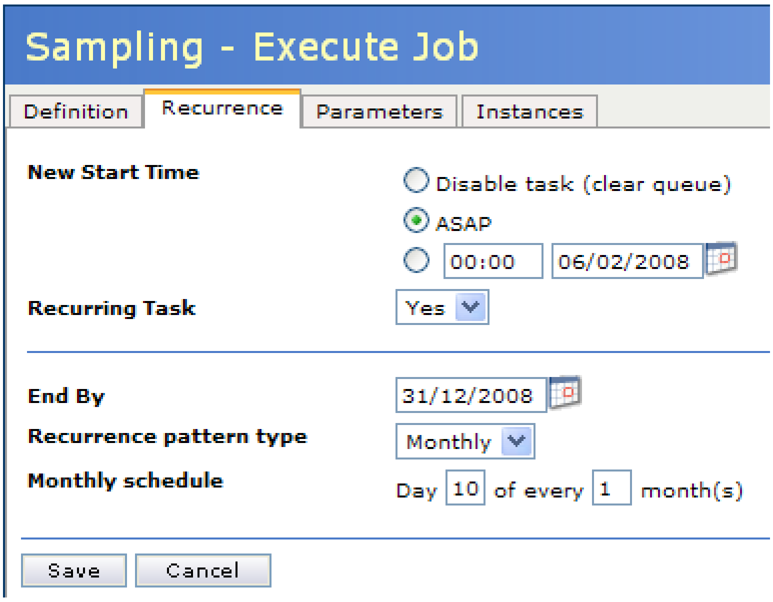


Figure 190 The Execute Job > Recurrence tab ready for changing

Here you can make the required changes to the job (see How to Change the Job Schedule Settings on page 197 for more information).

4. On completion, click **Save** to save the settings, then click **Close Window** to return to the Task list.

7.1.6.3.7. How to Generate Sample Fill-in

If a run does not find the required sample using the specified weight set, you can execute a "topping-up" run for which weights are recalculated automatically to generate the required total sample. The new weights are calculated based on the difference between the specified target and the outcome of the previous run.

1. On the Execution tab > Job Runs list, select the run you wish to top-up.
2. Click **Generate Sample Fill-in**.

   A confirmation window opens.

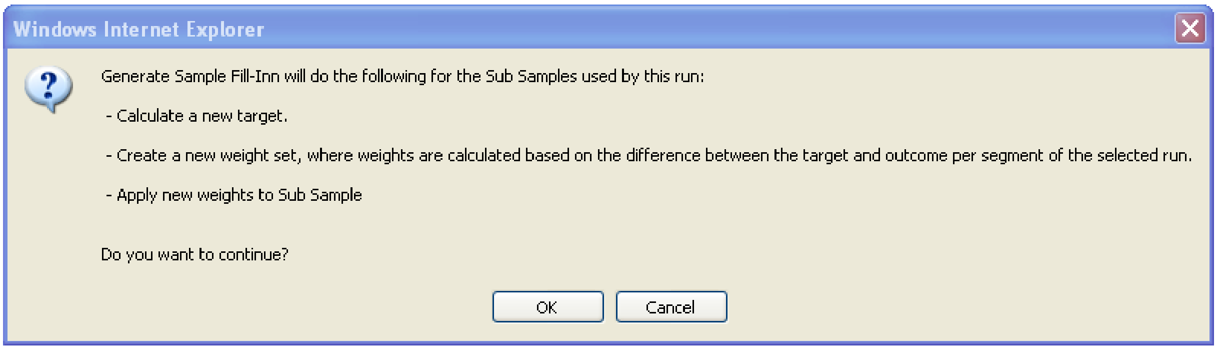


Figure 191 The confirmation window

3. Click **OK** to continue.

   The sub-sample target is changed to what is missing from the original sample, the sub sample weights are changed to ensure the required sample is achieved, the matrix used by the sub-sample is given new weights and the weight targets are updated. The job is then run and the sample will be completed.

7.1.6.3.8. How to Delete a Job from the Execute List

Once a job is scheduled for execution it will be listed in the Scheduling window. Go to this window to delete a job before it is executed (see How to Abort Execution of a Sampling Job on page 197 for more information)

7.1.6.4. After the Job has been Executed

Once a sampling job has been executed, the basic details of the job are presented in the Job Runs list in the lower part of the Execution tab (see The Job Runs Area on page 151 for more information). A number of procedures and operations can be performed from the Job Runs area. These are described in the following sections.

The reports generated for the various jobs that have been run are accessible through the Reporting tab (see The Reporting Tab on page **Error! Bookmark not defined.** for more information).

7.1.6.4.1. How to Remove a Run from the Panel

In the event you have performed a sampling task and updated your panel, but then wish to "undo" the sample selection, proceed as follows:

Note: This procedure will remove a selected run from the panel. To remove all existing runs from the panel, use Remove Job From Panel in the Job Execution area of the tab (see How to Remove a Job from the Panel on page 161 for more information).

1. In the Job Runs area in the lower part of the Execution tab, click on the **Run Number** for the sampling run you wish to cancel.
2. Click the **Remove Run From Panel** button (located in the Job Runs area).

   The Remove Sample dialog opens.

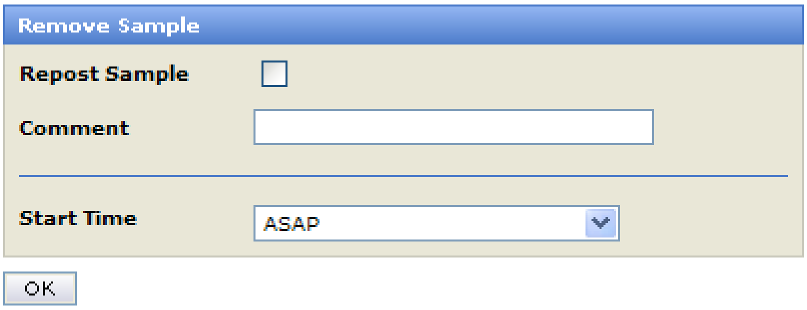


Figure 192 The Remove Sample dialog

- **Repost Sample** - you may wish to update the existing sample. Check this box to delete the existing sample and then automatically re-run the task. If you check this box, you can then select the time when the repost is to occur.
- **Comment -** type a comment into the field as required.
- **Start Time** – specify the time when the task is to commence. Click the down-arrow to open a drop-down list of the options available:
  - o **ASAP** – start the job as soon as possible. The job will be queued behind any other jobs awaiting processing in the database, and will be run as soon as the processor is available.
  - o **Schedule for later execution** – select this option if you want to run the task at a later time. If this option is selected, when you click **OK**, a dialog opens in which you can set the required time and date for the procedure to be run, and whether you want the job to be repeated.

3. Make the required selections and click **OK**.

   The task is run as specified.

4. On completion, click the **OK** button to return to the Execution tab.

   If you selected Repost Sample, once the Repost operation is completed then the Panel Updated column will show **No** for the selected run.

7.1.6.4.2. How to Remove a Job from the Panel

In the event you have performed a number of sampling tasks and updated your panel, but then wish to "undo" ALL the sample selections, proceed as follows:

> **Important**
> **This procedure will remove all the runs from the panel. To remove one specific run, use Remove Run From Panel in the Job Runs area of the tab (see How to Remove a Run from the Panel on page 160 for more information).**

1. In the Job Execution area in the upper part of the Execution tab, click the **Remove Job From Panel** button.

   The Remove Sample dialog opens.

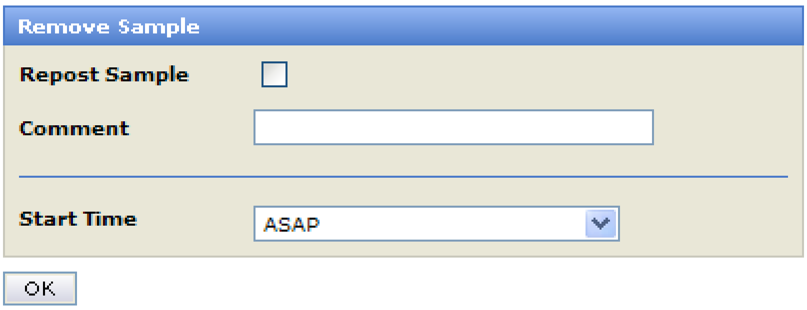


Figure 193 The Remove Sample dialog

- **Repost Sample** - you may wish to update the existing samples. Check this box to delete the existing samples and then automatically re-run the tasks. If you check this box, you can then select the time when the repost is to occur.
- **Comment -** type a comment into the field as required.
- **Start Time** – specify the time when the task is to commence. Click the down-arrow to open a drop-down list of the options available:
  - **ASAP** – start the removal task as soon as possible. The task will be queued behind any other tasks awaiting processing in the database, and will be run as soon as the processor is available.
  - **Schedule for later execution** – select this option if you want to run the task at a later time. If this option is selected, when you click **OK**, a dialog opens in which you can set the required time and date for the procedure to be run, and whether you want the job to be repeated.

3. Make the required selections and click **OK**.

   The task is run as specified.

4. On completion, click the **OK** button to return to the Execution tab.

   If you selected Repost Sample, once the Repost operation is completed then the Panel Updated column will show **No** for the selected run.

7.1.6.4.3. How to Upload the Sample File

Once you have created the required sample file, if it is not uploaded to the project automatically when it is created (see The Upload Sample Properties Page on page 156 for more information) then it must be uploaded "manually". To do so, proceed as follows:

1. In the Execution tab's Job Runs area, select the run you wish to upload to your project.
2. Click **Upload**.

   The Upload Sample Properties dialog box opens.

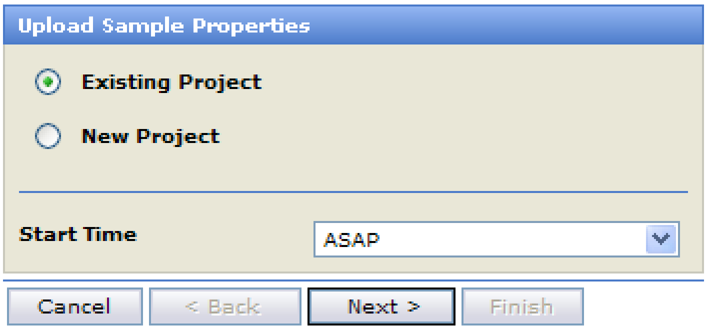


Figure 194 The Upload Sample Properties dialog - 1

- **Existing Project** - select to upload the sample file to an existing project.
- **New Project** - select to create a new project and upload the sample file to it.

3. Select the start time for the job and click **Next** (see How to Set the Execution Time/Date for a Job on page 154 for more information).

   The dialog changes to that shown below. Note that if you have selected to upload to a new project, the field layout will be slightly different.

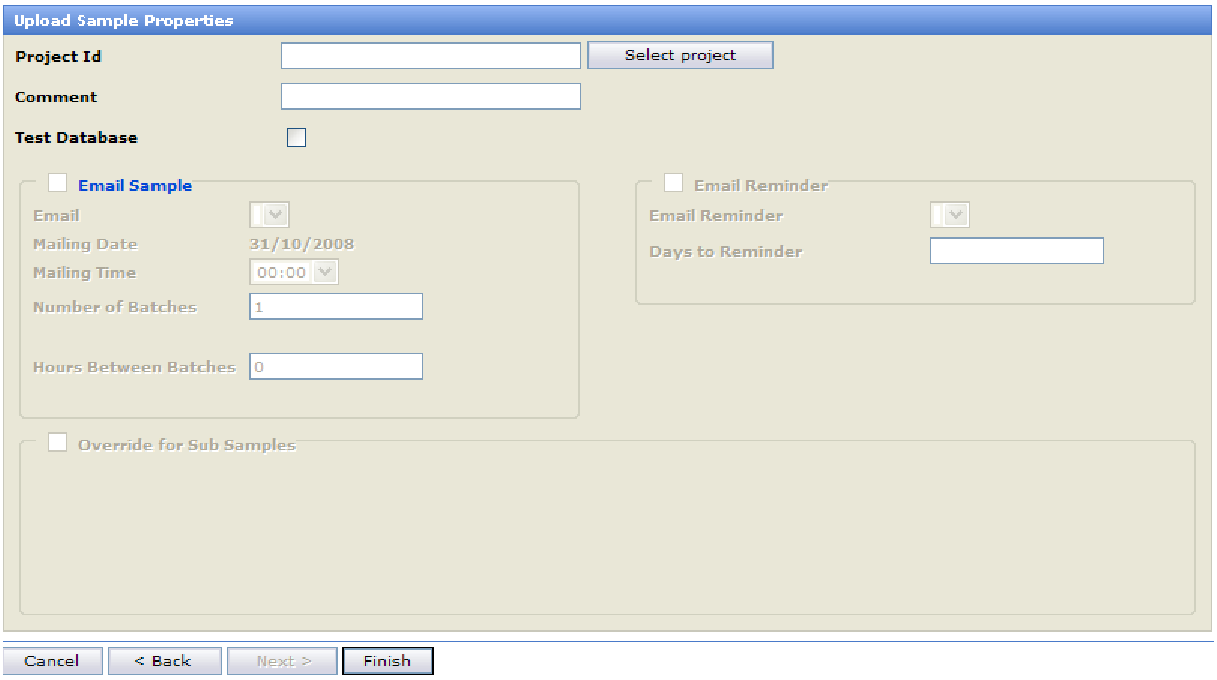


Figure 195 The Upload Sample Properties dialog - 2

- **Project ID** – the ID number of the project into which you wish to load the sample file.
- **Comment** – free text field for general comments.
- **Test Database** – check to load the data file into a test database such that you can test the survey.

2. In the Project ID field, write the ID number of the project into which you wish to load the sample file, and make the other settings as required.
3. Click **OK**.

   The file containing the details of the selected panelists is loaded into the selected survey. While this is happening, a task list and progress bar is displayed on the screen. On completion, an **OK** button will appear at the bottom of the task list.

4. Click **OK** to return to the Job Information page.

   The Sampling job is now complete. Refer to the separate Professional Authoring User Guide for further information on survey creation.

Note: When the sample file is generated, each panelist is assigned a random mailcode value from 0 to 9. This code is used to determine which batch the panelist is to be included in for email invitations and reminders. When the number of batches is selected, the panelists are divided amongst the batches according to their mailcode value. If only one batch is to be used, the mailcode value is ignored and all panelists in the sample file are included. If for example the number of batches is set to 2, then panelists with mailcode values 0, 1, 2, 3 and 4 will be allocated to the first batch and those with values 5, 6, 7, 8 and 9 to the second batch. If the number of batches is set to 10, all panelists with mailcode 0 will be in the first batch to be sent, all panelists with mailcode 1 will be in the second batch to be sent etc.

7.1.6.4.4. How to Change the Panel Mailing Date

If you need to change the mailing date (the date the project is to be emailed to the panel), then you can do so as follows:

1. In the Execution tab's Job Runs area, select the run you wish to change the mailing date for.
2. Click the **Change Mail Date** button.

   The Change Date dialog opens.

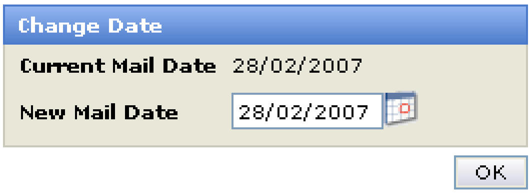


Figure 196 Example of the Change Date dialog

3. Set the date as required.
4. Click **OK**.

7.1.6.4.5. How to Add Test Panelists to the Database

Once a job has been executed for the first time, the **Add Test Panelists** button appears in the tab's toolbar. To add a tester template to the database:

1. Click the **Add Test Panelists** button.

   The Tester Template List window opens. This window lists all the tester templates available for this panel (see Tester Template List on page 201 for more information).

2. Select in the list the template you wish to add to the database.
3. Click **Apply and Close**.

   The template is added to the database.

7.1.6.4.6. How to Export the Sample File

Once you have created the sample file you can export it to another server or project. Proceed as follows:

1. On the Execution tab, in the Job Runs area select the job run for which you wish to export the sample file.
2. Click **Export Sample File**.

   The Sample File Export dialog opens.

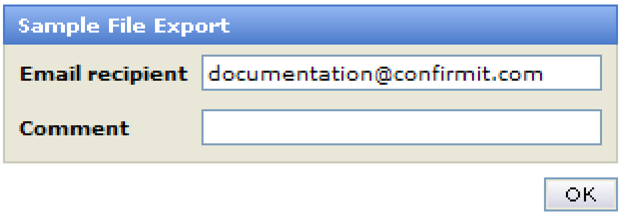


Figure 197 The Sample File Export dialog

3. The Email Recipient field contains the email address registered for the current user. Change this as required.
4. Type a comment into the Comment field if required and click **OK**.

   The sample file created by the selected job is zipped, attached to an email and sent to the specified address.

7.1.6.5. The Task Definition Properties Dialog

Use this dialog to set up recurring jobs, and to view the details of jobs that are already set up to run at some point in the future. The tabs in the dialog are:

- **Properties**– provides general information on the selected job, and allows you to enter comments on the job.

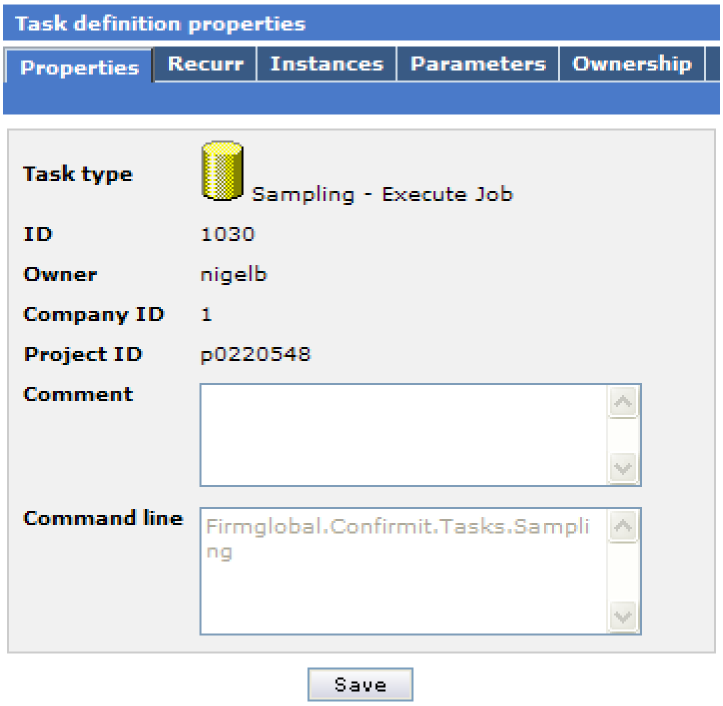


Figure 198 Example of the Properties tab

- **Recurr** – once the settings have been saved, this tab displays the initial settings for the current job and the dates and times of any recurrences.
- **Instances** – One job scheduled for execution can have several instances (recurrences). The Instances tab lists those recurrences that have been completed, and the next recurrence scheduled to be performed. Click on the link in the Schedule column to check the details for each recurrence.

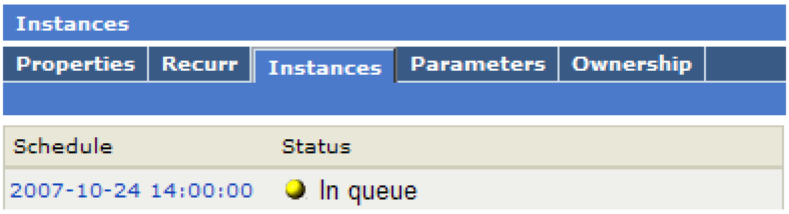


Figure 199 Example of the Instances tab

- **Parameters** – is for information only.

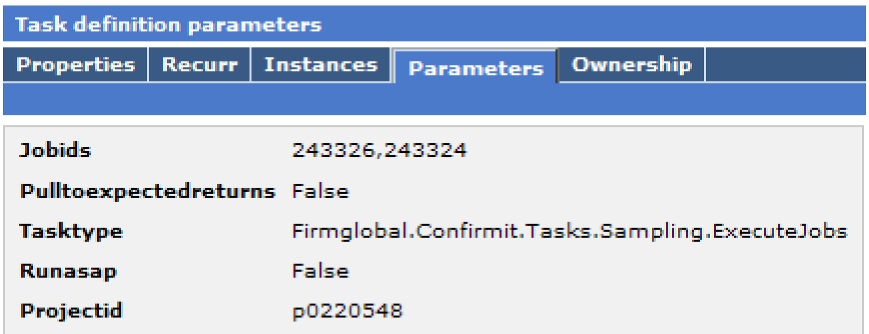


Figure 200 Example of the Parameters tab

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

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

Note: If the owner of a sampling task is changed, the ownership of any associated sample upload task will also be changed such that it remains associated.

7.1.7. The Reporting Tab

This tab lists the jobs that have been executed, and provides access to the reports for those jobs.

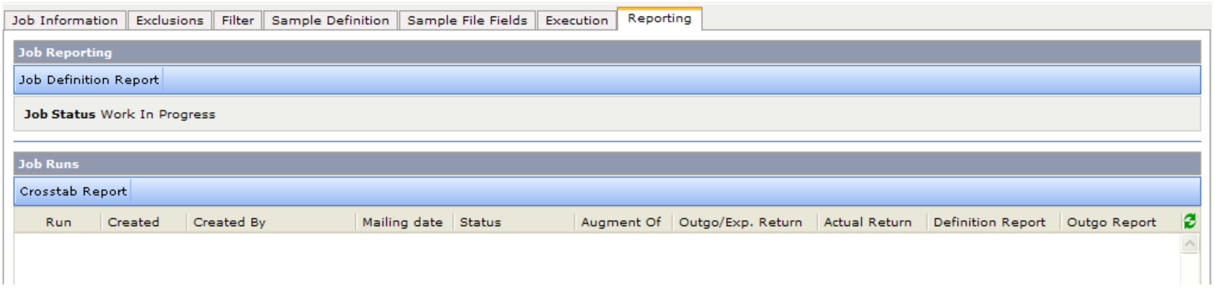


Figure 201 Example of the Reporting tab

The tab contains two main areas:

- **The Job Reporting area** - provides access to the current Job Definition Report and status (see The Job Reporting Area on page 166 for more information)
- **The Job Runs area** - provides access to the Job Definition Reports and other information for each run, as the job was defined when that run was executed (see The Job Runs Area on page **Error! Bookmark not defined.** for more information).

7.1.7.1. The Job Reporting Area

The Job Reporting area is in the upper part of the Reporting tab.

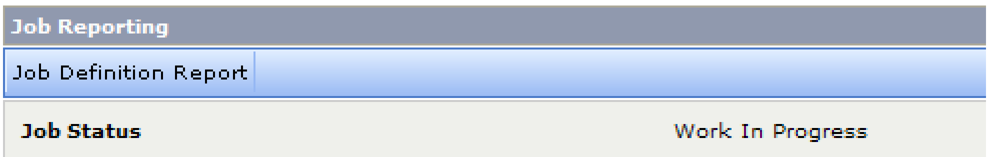


Figure 202 The Job Reporting area on the Reporting tab

The area displays the current status for the job. Note that the job status is changed automatically by Forsta Plus as it passes through the various development stages. The area has one button:

- **Job Definition Report** – click this button to display a report of the current job definition, as shown in the example below. Note that the Definition Report links in the Job Runs area provide access to the Job Definition Reports as they were when the runs were performed.

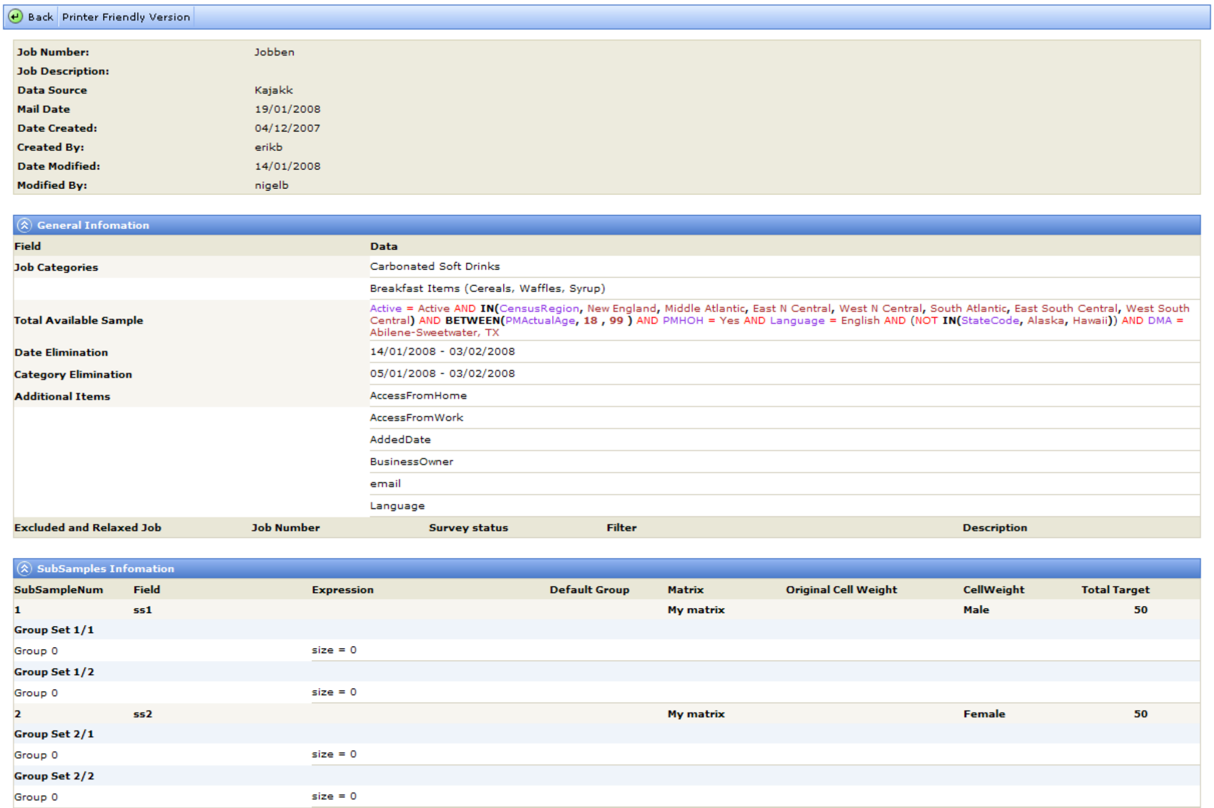


Figure 203 Example of a Job Definition Report

The Job Definition Report report contains three sections:

- **Job Details** – the job number, status etc (see The Job Details Area on page 167 for more information).
- **General Information** – the job categories, the expression and exclusions used, and the additional items selected (see The General Information Area on page 167 for more information).
- **Sub Sample Information** – details of the sub samples defined (see The SubSamples Information Area on page 168 for more information).

7.1.7.1.1. The Job Details Area

This area provides general details of the job, such as the number, a description, the data source etc..

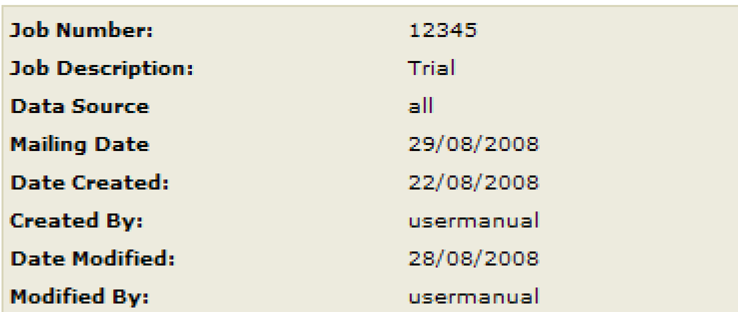


Figure 204 Example of the Job Details area

Click the green **Back** button to close the window and return to the Reporting tab.

7.1.7.1.2. The General Information Area

This area shows general information about the job, such as which categories are selected, the filter scripting, exclusions etc..

Click the up or down arrow button in the area's header row to show or hide the information, and click the green **Back** button to close the window and return to the Reporting tab.

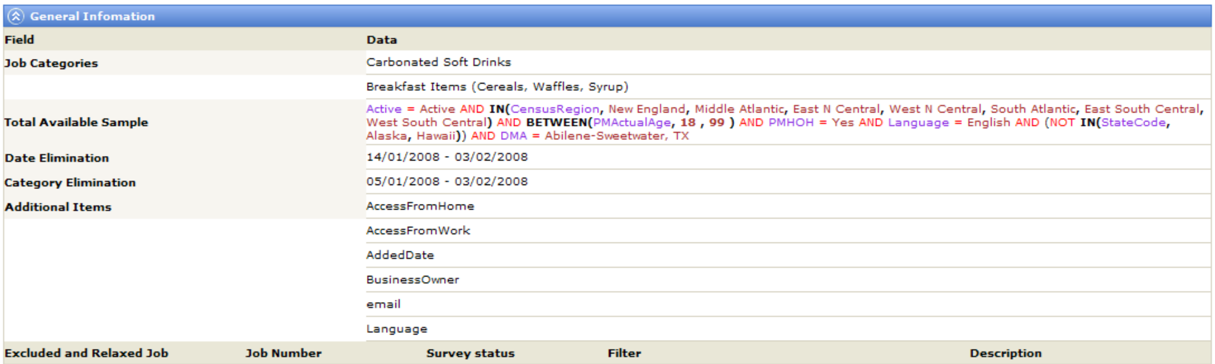


Figure 205 Example of the General Information area

Note that exclusions are sorted by job number.

7.1.7.1.3. The SubSamples Information Area

This area displays details of the various sub-samples in the sample.

Click the up or down arrow button in the area's header row to show or hide the information, and click the green **Back** button to close the window and return to the Reporting tab.

Figure 206 Example of the SubSamples Information area

7.1.7.2. The Job Runs Area

The Reporting tab's Job Runs area is located in the lower part of the tab.

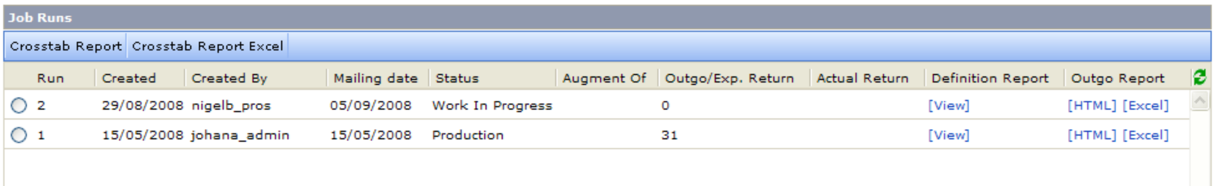


Figure 207 Example of the Reporting tab's Job Runs area

This area lists the job runs that have been performed, and provides links to the various reports that are created for each run. These are:

- **Crosstab Report** - you can build simple tables to analyze the generated samples using the same data as the Outgo Reports. Click this button to use the "current" sample settings (see The Crosstab Report on page 169 for more information).
- **Definition Report** - specifies the job definition at the moment the run was executed (see The Definition Report on page 170 for more information).

- **Outgo Report** - provides the outgo report in HTML (see The Outgo Report HTML on page 171 for more information) and Excel format (see The Outgo Report Excel on page 172 for more information).

Click on the button above the run list or the appropriate blue link to open the required report.

7.1.7.2.1. The Crosstab Report

This tab allows you to select various fields and segments from the database, and create reports using the selected items. You can add the desired fields and segments to the table rows and columns, nest or stack them as required, then view the results.

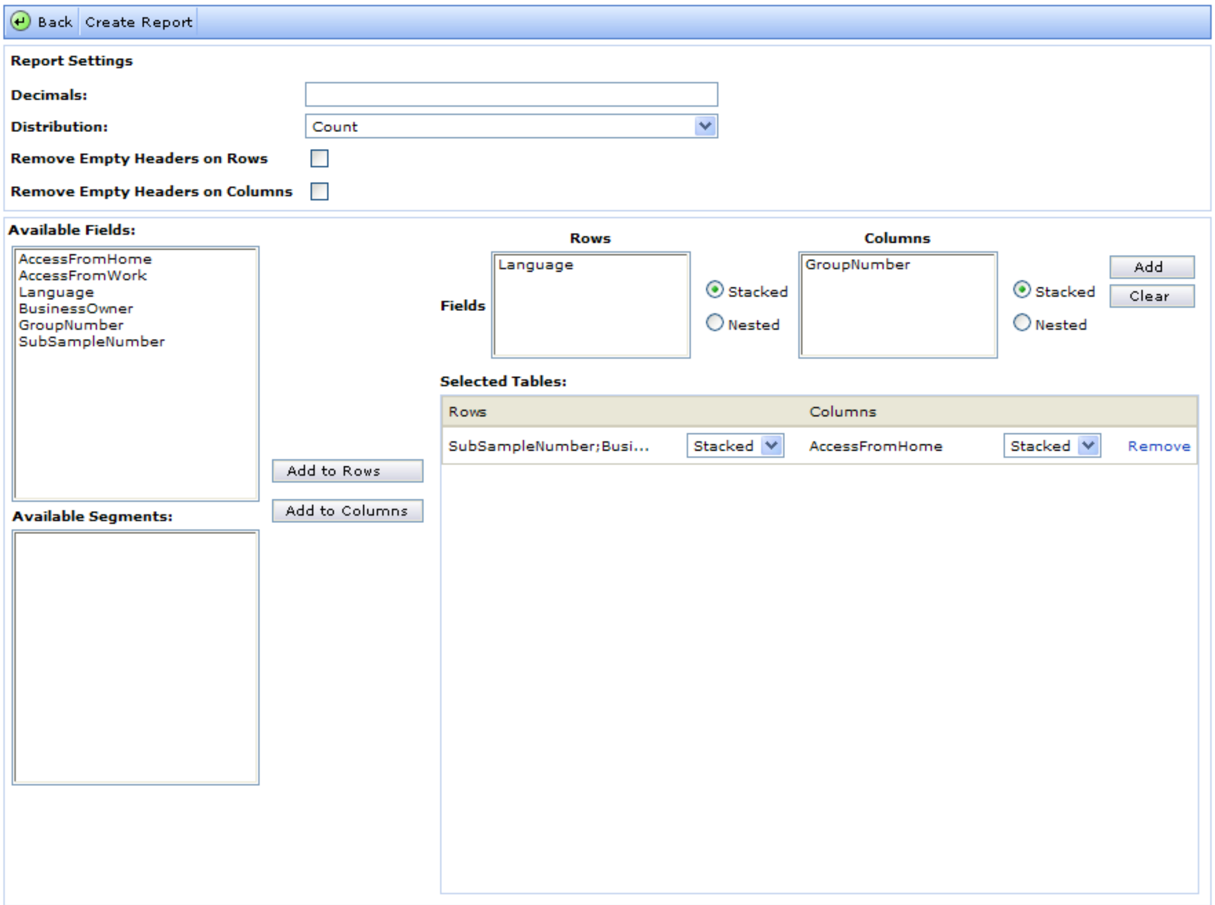


Figure 208 Example of a Crosstab Report under construction

- **Back** - click to return to the Reporting tab.
- **Create Report** - once you have selected the required fields and/or segments, click to view the resulting report.
- **Decimals** - you can specify the number of decimals to be used in the results. Type a positive integer into the field. Note that you can increase the number of decimal places displayed to reduce the effects of rounding and thereby increase the accuracy of the displayed data.
- **Distribution** - select the value on which the chart is to be based. Note that the selected option must be available in the table for it to be presented in the chart.
  - **Count** – shows the actual number of responses per series.
  - **Horizontal Percent** – the results calculated as a percentage, where the columns add up to 100% “horizontally” in the table.
  - **Vertical Percent** – the results calculated as a percentage, where the columns add up to 100% “vertically” in the table.
  - Combinations of the above.

- **Remove Empty Headers on Rows/Columns** - check the boxes to automatically hide (mask) all rows and/or columns that contain no data. As soon as data is received for the row or column, it will be displayed.

To add a field or segment to the report, select it in the Available list and click **Add to Rows/Columns** as appropriate. The selected item is then copied into the Rows or Columns field. Select the **Stacked** or **Nested** radio buttons as required, then click **Add** to move the selected items to the Selected Tables field. When you have set up the report as required, click **Create Report** to view the results.

Back

1 (SubSampleNumber --- AccessFromHome)

	Yes	No	Total
Sub Sample Number			
1	3	0	**3**
2	2	0	**2**
Total	**5**	**0**	**5**

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2 (Language --- GroupNumber)

	Group Number	
	0	**Total**
English	0	**5**
French	0	**0**
German	0	**0**
Italian	0	**0**
Spanish	0	**0**
Total	**0**	**5**

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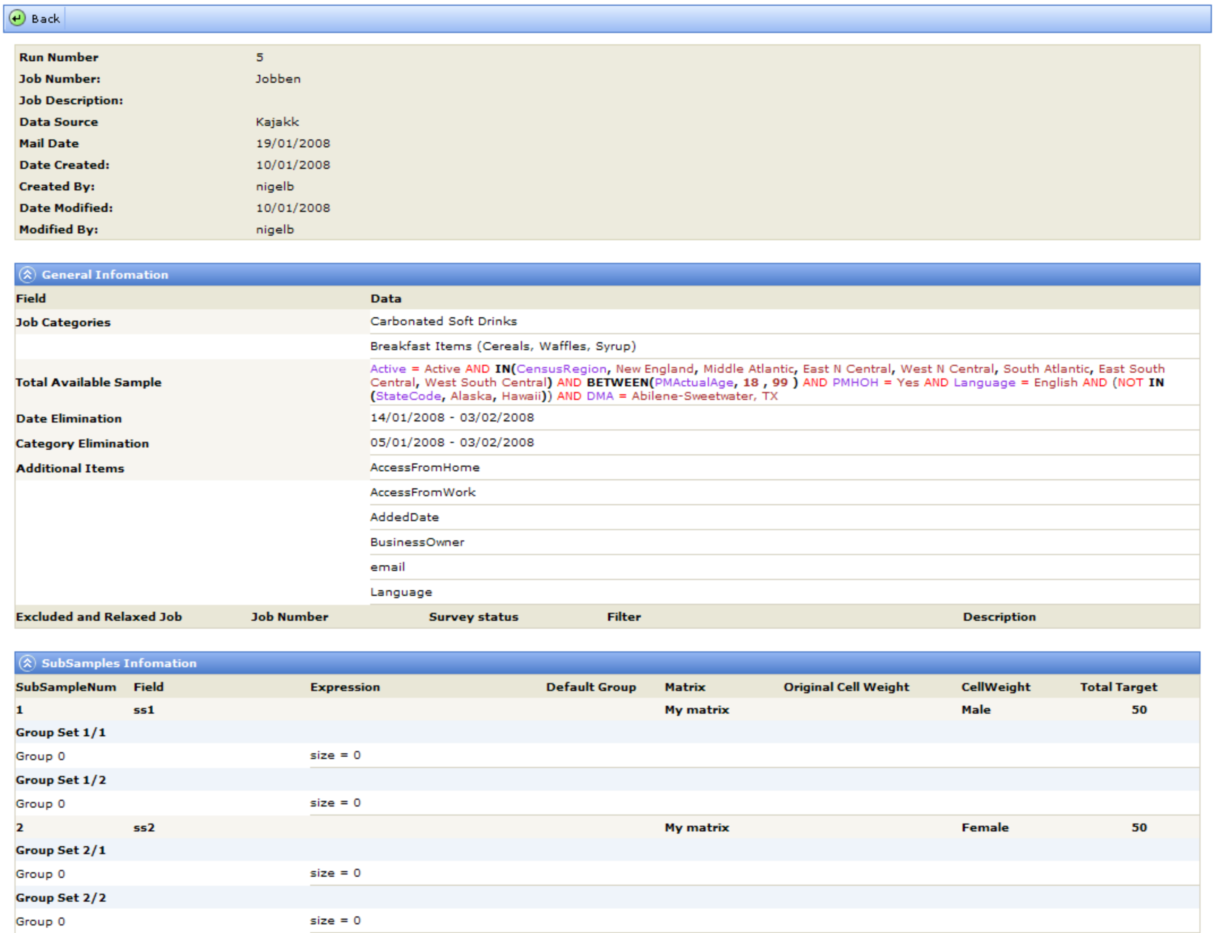
Figure 209 The resulting Crosstab Report

7.1.7.2.2. The Definition Report

This report specifies the job definition at the moment the run was executed. When the Job Runs list contains a number of runs, the Definition reports for the runs may well differ. Note that the Job Definition Report button in the Job Reporting area opens a report of the "current" settings (see The Job Reporting Area on page 166 for more information).



Back

Run Number	5
Job Number:	Jobben
Job Description:	
Data Source	Kajakk
Mail Date	19/01/2008
Date Created:	10/01/2008
Created By:	nigelb
Date Modified:	10/01/2008
Modified By:	nigelb

General Infomation

Field	Data
Job Categories	Carbonated Soft Drinks
	Breakfast Items (Cereals, Waffles, Syrup)
Total Available Sample	Active = Active AND IN(CensusRegion, New England, Middle Atlantic, East N Central, West N Central, South Atlantic, East South Central, West South Central) AND BETWEEN(PMActualAge, 18 , 99) AND PMHOH = Yes AND Language = English AND (NOT IN (StateCode, Alaska, Hawaii)) AND DMA = Abilene-Sweetwater, TX
Date Elimination	14/01/2008 - 03/02/2008
Category Elimination	05/01/2008 - 03/02/2008
Additional Items	AccessFromHome
	AccessFromWork
	AddedDate
	BusinessOwner
	email
	Language

Excluded and Relaxed Job	Job Number	Survey status	Filter	Description

SubSamples Infomation

SubSampleNum	Field	Expression	Default Group	Matrix	Original Cell Weight	CellWeight	Total Target
1	ss1			My matrix		Male	50
Group Set 1/1							
Group 0		size = 0					
Group Set 1/2							
Group 0		size = 0					
2	ss2			My matrix		Female	50
Group Set 2/1							
Group 0		size = 0					
Group Set 2/2							
Group 0		size = 0					

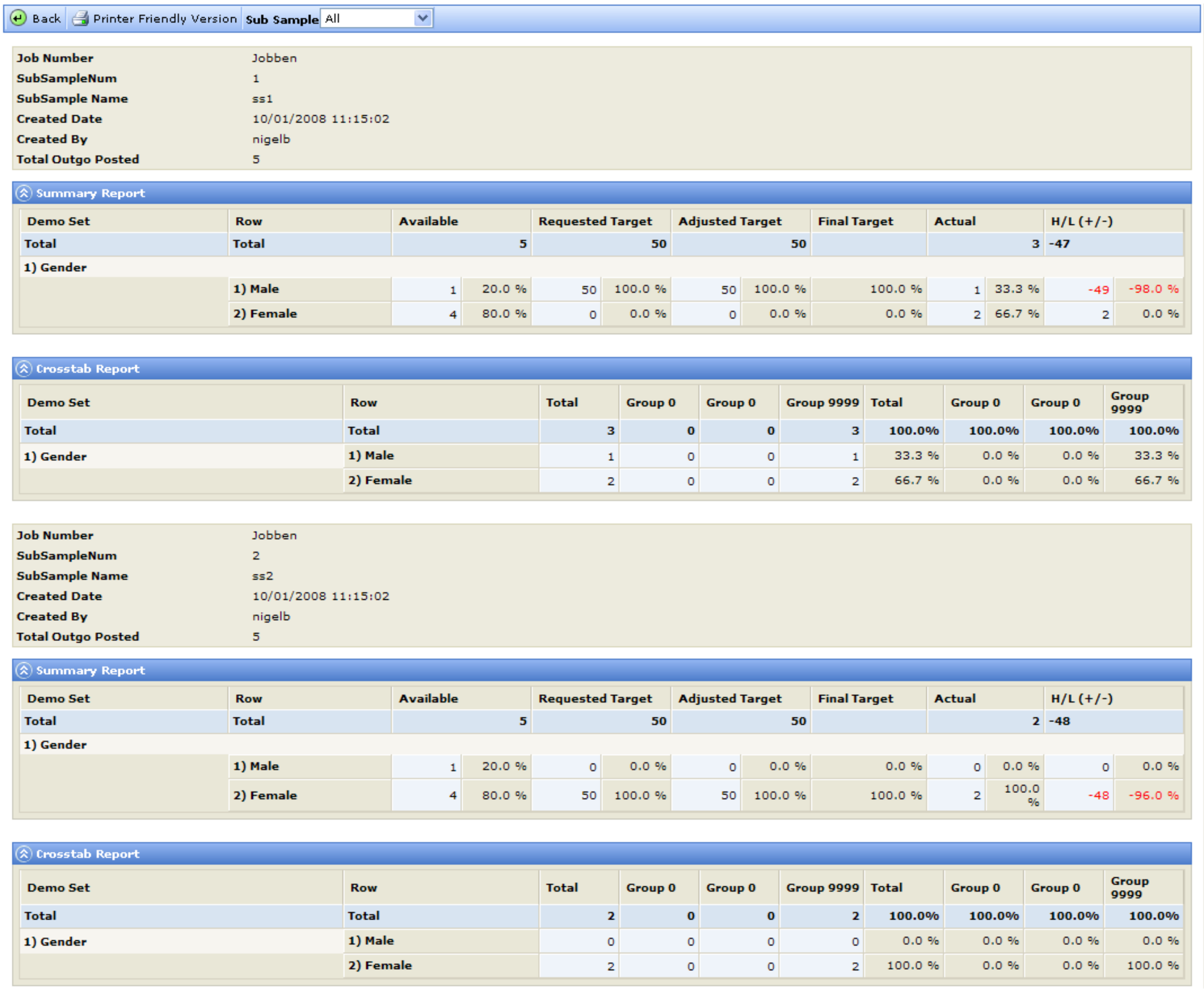
Figure 210 Example of a Definition Report

The Definition Report report comprises three areas:

- **Job Details** – the job number, status etc (see The Job Details Area on page 167 for more information).
- **General Information** – the job categories, the expression and exclusions used, and the additional items selected (see The General Information Area on page 167 for more information).
- **Sub Sample Information** – details of the sub samples defined (see The SubSamples Information Area on page 168 for more information).

7.1.7.2.3. The Outgo Report HTML

This option allows you to create Outgo reports in HTML format, as shown in the example below.



Back | Printer Friendly Version | Sub Sample All

Job Number	Jobben
SubSampleNum	1
SubSample Name	ss1
Created Date	10/01/2008 11:15:02
Created By	nigelb
Total Outgo Posted	5

Summary Report

Demo Set	Row	Available		Requested Target		Adjusted Target		Final Target	Actual		H/L (+/-)	
Total	Total	5		50		50			3		-47	
1) Gender												
	1) Male	1	20.0 %	50	100.0 %	50	100.0 %	100.0 %	1	33.3 %	-49	-98.0 %
	2) Female	4	80.0 %	0	0.0 %	0	0.0 %	0.0 %	2	66.7 %	2	0.0 %

Crosstab Report

Demo Set	Row	Total	Group 0	Group 0	Group 9999	Total	Group 0	Group 0	Group 9999
Total	Total	3	0	0	3	100.0%	100.0%	100.0%	100.0%
1) Gender	1) Male	1	0	0	1	33.3 %	0.0 %	0.0 %	33.3 %
	2) Female	2	0	0	2	66.7 %	0.0 %	0.0 %	66.7 %

Job Number	Jobben
SubSampleNum	2
SubSample Name	ss2
Created Date	10/01/2008 11:15:02
Created By	nigelb
Total Outgo Posted	5

Summary Report

Demo Set	Row	Available		Requested Target		Adjusted Target		Final Target	Actual		H/L (+/-)	
Total	Total	5		50		50			2		-48	
1) Gender												
	1) Male	1	20.0 %	0	0.0 %	0	0.0 %	0.0 %	0	0.0 %	0	0.0 %
	2) Female	4	80.0 %	50	100.0 %	50	100.0 %	100.0 %	2	100.0 %	-48	-96.0 %

Crosstab Report

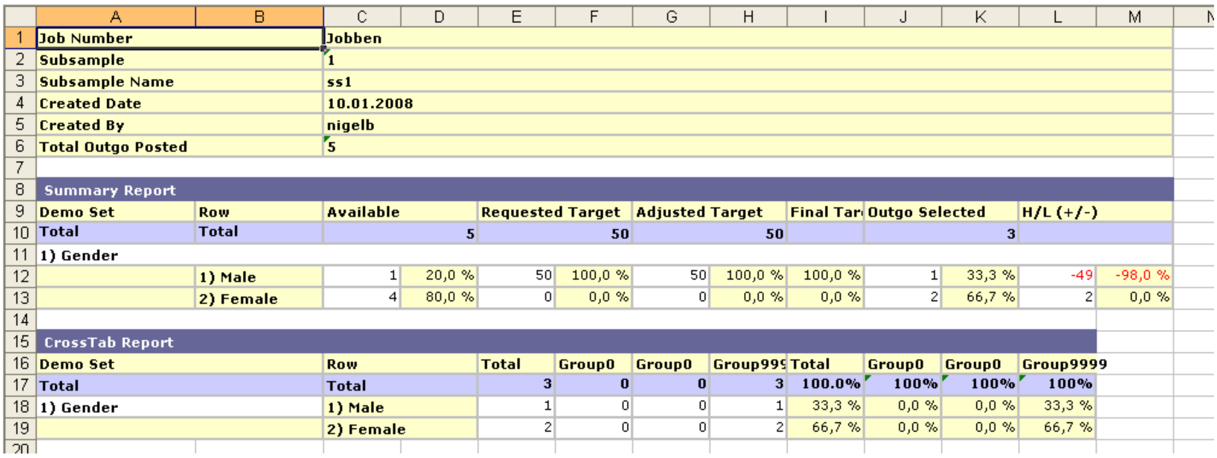
Demo Set	Row	Total	Group 0	Group 0	Group 9999	Total	Group 0	Group 0	Group 9999
Total	Total	2	0	0	2	100.0%	100.0%	100.0%	100.0%
1) Gender	1) Male	0	0	0	0	0.0 %	0.0 %	0.0 %	0.0 %
	2) Female	2	0	0	2	100.0 %	0.0 %	0.0 %	100.0 %

Figure 211 Example of an Outgo Report HTML

- Click **Back** to return to the Reporting tab.
- **Printer Friendly version** – opens a new window containing a version of the report that is set up for printing.
- **Sub Sample**– the information is presented separately for each sub-sample. Use this field to filter the sub sample details that you want to be displayed. Select between the various sub samples that are included in the job, or All.

7.1.7.2.4. The Outgo Report Excel

This option allows you to create Outgo reports in Excel format, as shown in the example below.



	A	B	C	D	E	F	G	H	I	J	K	L	M
1	Job Number		Jobben										
2	Subsample		1										
3	Subsample Name		ss1										
4	Created Date		10.01.2008										
5	Created By		nigelb										
6	Total Outgo Posted		5										
7													
8	Summary Report												
9	Demo Set	Row	Available		Requested Target		Adjusted Target		Final Tar	Outgo Selected		H/L (+/-)	
10	Total	Total	5		50		50			3			
11	1) Gender												
12		1) Male	1	20,0 %	50	100,0 %	50	100,0 %	100,0 %	1	33,3 %	-49	-98,0 %
13		2) Female	4	80,0 %	0	0,0 %	0	0,0 %	0,0 %	2	66,7 %	2	0,0 %
14													
15	CrossTab Report												
16	Demo Set		Row		Total	Group0	Group0	Group999	Total	Group0	Group0	Group9999	
17	Total		Total		3	0	0	3	100.0%	100%	100%	100%	
18	1) Gender		1) Male		1	0	0	1	33,3 %	0,0 %	0,0 %	33,3 %	
19			2) Female		2	0	0	2	66,7 %	0,0 %	0,0 %	66,7 %	

Figure 212 Example of an Outgo Report in Excel format

7.2. Current Matrix

This window shows the details of the matrix currently selected in the Matrix List. The window contains four tabs:

- **General** – displays the general details for the matrix and allows you to select the data source to be used.
- **Dimensions** – lists the existing dimensions for the matrix and allows you to create more as required.
- **Weights** – lists the existing weights for the matrix and allows you to create more as required.
- **Report** – displays a report of the current settings.

The window opens at the General tab.

Note: In the event no matrix has been selected so far in the current Forsta Plus session, when you click on Current Matrix you will be taken to the Matrix List. Select a matrix to go to the Current Matrix page.

7.2.1. The General Tab

This tab provides general information about the selected matrix.

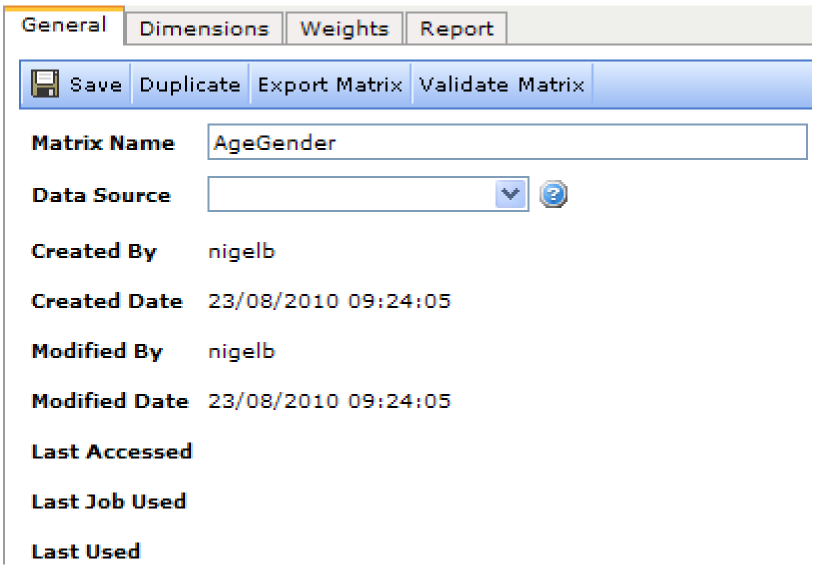


Figure 213 The Current Matrix > General tab

The tab's toolbar contains four buttons:

- **Save** – saves changes. The button flashes while Forsta Plus detects unsaved changes.

- **Duplicate** – creates a copy of the current matrix.
- **Export Matrix** – exports a matrix to another server.
- **Validate Matrix** – checks the matrix to ensure it contains no errors.

Other fields are:

- **Matrix Name -** the name of the matrix. You can edit the name here.
- **Data Source -** this drop-down lists the available BitStream files that can be used as a base for the matrix. If you select the blank option, the data source used will be the latest-launched version of the panel.

7.2.2. The Dimensions Tab

A Dimension is a set of segments (answer options). For example, “Gender” could be a dimension in a matrix, and within that dimension could be the segments “Male” and “Female”.

Go to the **Sample Management > Current Matrix** window, and open the Dimensions tab. This tab lists the dimensions registered for the currently selected matrix.

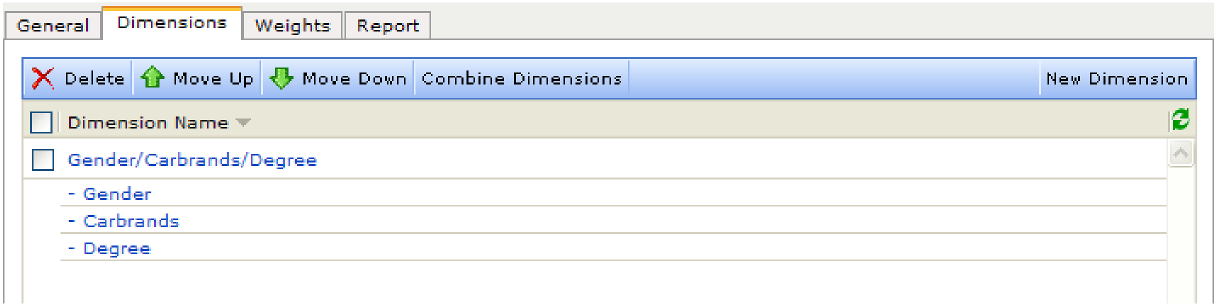


Figure 214 Example of the Dimensions tab list

In the example, the dimension is named Gender/Carbrands/Degree, and this is a "combined" dimension; one dimension that comprises two or more individual dimensions. The toolbar buttons are:

- **Delete** – deletes selected Dimensions.
- **Move Up/Down** – moves selected Dimensions up or down in the list.
- **Combine Dimensions** - click to combine the selected dimensions.
- **New Dimension**– creates a new dimension for the current matrix.
- **Refresh**– refreshes the display. This may be required in the event changes have been made to the list that are not displayed immediately.

Click on a **Dimension Name** link to open the Edit Dimension page for that dimension. The figure below shows the details of the Degree dimension from the combined dimension shown above.

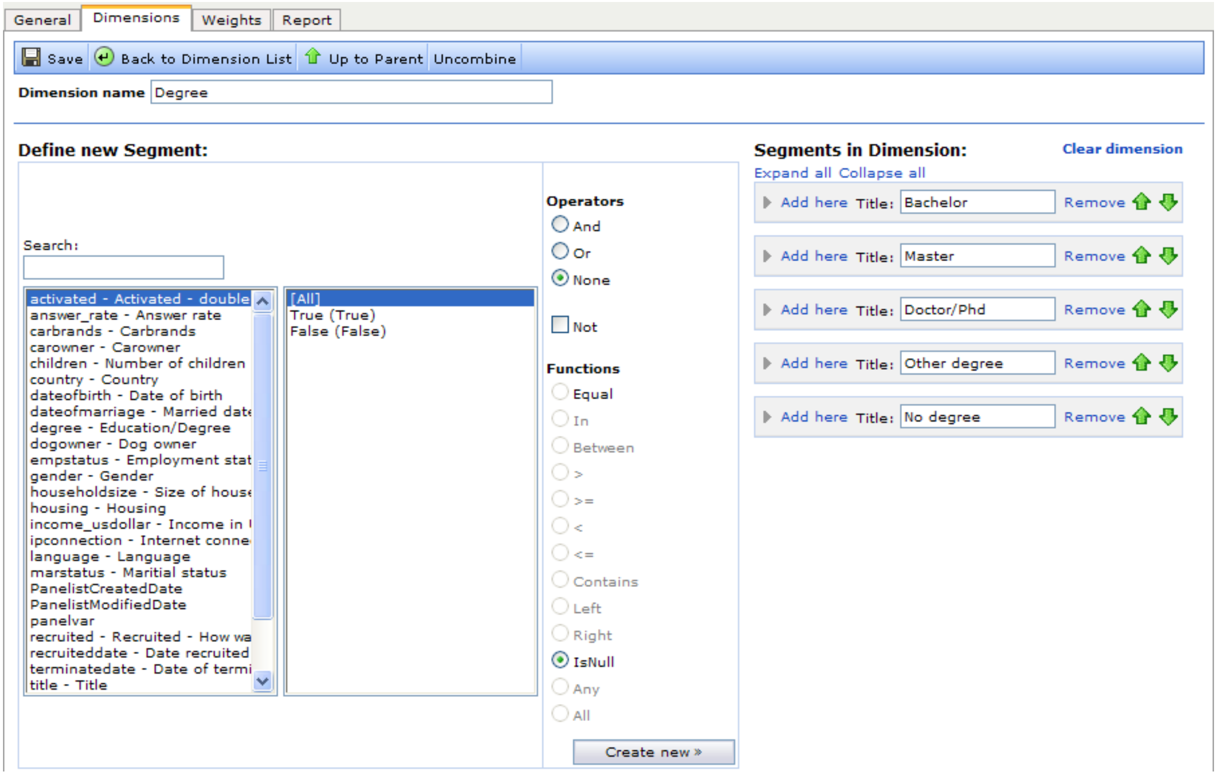


Figure 215 Example of the Edit Dimension page for a dimension

The toolbar buttons and data fields are:

- **Save** – saves changes for the tab. The button flashes while Forsta Plus has unsaved changes.
- **Back to Dimension List** – takes you back to the list of dimensions registered for this job.
- **Up to Parent -** for combined dimensions. Moves focus up to the parent dimension.
- **Uncombine -** for combined dimensions. Extracts the selected dimension out of the combined dimension, allowing separate weighting and processing (see How to Uncombine a Dimension on page 187 for more information).
- **Dimension Name** – the name of the selected dimension.
- **Collapse Type** – appears below Dimension Name in the event a panel does not contain enough suitable panelists to fill 'requested' targets in particular segments. This property controls how shortages in segments are to be handled. The options are:
  - **Nominal collapsing** – The targets for the segments with shortages are reduced to correspond to the maximum available in the sample population. The excess (un-allocated) target is distributed proportionately (according to segment targets) to the other segments within the dimension (see Nominal Collapsing on page 176 for more information).
  - **Ordinal collapsing** – in shortage scenarios, the total target is kept. The weight targets for the segments with shortages are reduced to correspond to the maximum available in the sample population. The excess (un-allocated) target is distributed to the next segment within the dimension (see Ordinal Collapsing on page 176 for more information).
  - **Non-collapsing adjust targets** – the total target is reduced by the amount the segment is short. To reach the original target outgo for the other segments, the weight targets for all the segments within this dimension are recalculated to suit the adjusted total target (see Non-Collapsing Adjust Targets on page 177 for more information).
  - **Non-collapsing keep targets** – the total target is reduced by the amount needed to accommodate the original weight target for a segment with shortage. All segment weight targets are kept (see Non-Collapsing Keep Targets on page 177 for more information).

Note: The number of dimensions and the number of segments within the dimensions will significantly affect the time taken to run the sample job. Depending on the composition of the panel, it may also become impossible to fill all cells in the matrix. For extreme matrix definitions with many dimensions and/or large lists of segments within the dimensions, the sample extract may become impossible to perform.

Select two or more dimensions in the list and click the **Combine Dimensions** button to combine the selected dimensions (see Combined Dimensions on page 185 for more information).

7.2.2.1. Nominal Collapsing

Nominal data is a form of categorical data where the order of the categories is not significant. Examples include industry ("Accommodation, Cafes and Restaurants", "Agriculture, Forestry and Fishing", "Communication Services" ,...), gender, ethnicity etc. In shortage scenarios, the target sample outgo is kept. The segment target of a segment with shortage is reduced to correspond to the maximum available the in sample population. The excess target is distributed proportionately (according to the segment targets) to the other segments within the dimension.

For example: Assume we have asked for a sample of 40000 in total, spread out evenly across the age groups with 10% (4000) taken from each group. In this case, six of the age groups have shortages, but we see that the total number of panelists requested is kept by filling up from the four segments where we have an excess. Note that the missing panelists are drawn as evenly as possible between these four segments (1413,1412, 861, 1413).

Summary Report

Demo Set	Row	Available		Requested Target		Adjusted Target		Final Target	Actual		H/L (+/-)	
Total	Total		45,742		40,000		40,000			40,001	1	
1) AgeGroupNominal												
Nominal collapsing	1) -15	7,403	16.2 %	4,000	10.0 %	4,000	10.0 %	13.5 %	5,413	13.5 %	1,413	35.3 %
	2) 15-19	2,897	6.3 %	4,000	10.0 %	4,000	10.0 %	7.2 %	2,897	7.2 %	-1,103	-27.6 %
	3) 20-24	3,754	8.2 %	4,000	10.0 %	4,000	10.0 %	9.4 %	3,754	9.4 %	-246	-6.2 %
	4) 25-34	8,867	19.4 %	4,000	10.0 %	4,000	10.0 %	13.5 %	5,412	13.5 %	1,412	35.3 %
	5) 35-44	4,861	10.6 %	4,000	10.0 %	4,000	10.0 %	12.2 %	4,861	12.2 %	861	21.5 %
	6) 45-54	3,220	7.0 %	4,000	10.0 %	4,000	10.0 %	8.1 %	3,220	8.0 %	-780	-19.5 %
	7) 55-64	3,132	6.8 %	4,000	10.0 %	4,000	10.0 %	7.8 %	3,132	7.8 %	-868	-21.7 %
	8) 65-74	2,817	6.2 %	4,000	10.0 %	4,000	10.0 %	7.0 %	2,817	7.0 %	-1,183	-29.6 %
	9) 75-84	3,083	6.7 %	4,000	10.0 %	4,000	10.0 %	7.7 %	3,083	7.7 %	-917	-22.9 %
	10) 85+	5,708	12.5 %	4,000	10.0 %	4,000	10.0 %	13.5 %	5,412	13.5 %	1,412	35.3 %

Figure 216 Example of the results when Collapse Type is set to Nominal Collapsing

7.2.2.2. Ordinal Collapsing

For ordinal data, the numbers assigned to the objects represent the rank order (1st, 2nd, 3rd etc.) of the entities measured. For this type of data, comparisons of 'greater than' and 'less than' can be made. In shortage scenarios, target sample outgo is kept. The segment target of a segment with shortage is reduced to correspond to the maximum available in the sample population. The excess target (the difference between the requested target and the actual quantity available) is distributed to the next segment within the dimension. If the last segment has a shortage, the redistribution will be done in reverse order - the next to last segment will be given the excess target.

For example: Assume we asked for a sample of 40000 in total, spread out evenly across the age groups with 10% (4000) taken from each group. We have a lot of shortages, and if we look at the figures we see that the shortages for age groups 15-19 and 20-24 are compensated for in the 25-34 segment. The next shortages are in segments 6,7,8 and 9. These shortage are partially compensated for in the following segment (10). However we don't have enough panelists in segment 10 to fully compensate, so then the order is reversed. This means we try to compensate in segment 9, then segment 8 etc. but these are already used up. As many as possible are taken from segment 5 but there are still not enough, so the remainder are taken from segment 4.

Summary Report

Demo Set	Row	Available		Requested Target		Adjusted Target		Final Target	Actual		H/L (+/-)	
Total	Total	45,742		40,000		40,000			40,001		1	
1) AgeGroupOrdinal												
Ordinal collapsing	1) -15	7,403	16.2 %	4,000	10.0 %	4,000	10.0 %	10.0 %	4,000	10.0 %	0	0.0 %
	2) 15-19	2,897	6.3 %	4,000	10.0 %	4,000	10.0 %	7.2 %	2,897	7.2 %	-1,103	-27.6 %
	3) 20-24	3,754	8.2 %	4,000	10.0 %	4,000	10.0 %	9.4 %	3,754	9.4 %	-246	-6.2 %
	4) 25-34	8,867	19.4 %	4,000	10.0 %	4,000	10.0 %	16.3 %	6,529	16.3 %	2,529	63.2 %
	5) 35-44	4,861	10.6 %	4,000	10.0 %	4,000	10.0 %	12.2 %	4,861	12.2 %	861	21.5 %
	6) 45-54	3,220	7.0 %	4,000	10.0 %	4,000	10.0 %	8.1 %	3,220	8.0 %	-780	-19.5 %
	7) 55-64	3,132	6.8 %	4,000	10.0 %	4,000	10.0 %	7.8 %	3,132	7.8 %	-868	-21.7 %
	8) 65-74	2,817	6.2 %	4,000	10.0 %	4,000	10.0 %	7.0 %	2,817	7.0 %	-1,183	-29.6 %
	9) 75-84	3,083	6.7 %	4,000	10.0 %	4,000	10.0 %	7.7 %	3,083	7.7 %	-917	-22.9 %
	10) 85+	5,708	12.5 %	4,000	10.0 %	4,000	10.0 %	14.3 %	5,708	14.3 %	1,708	42.7 %

Figure 217 Example of the results when Collapse Type is set to Ordinal Collapsing

7.2.2.3. Non-Collapsing Adjust Targets

Target sample outgo is reduced by the amount the segment is short. In order to reach the original target outgo for the other segments, the segment targets for all the segments within this dimension are recalculated to suit the adjusted sample outgo.

For example: Assume we have asked for 40000 panelists, divided evenly as 50% females and 50% males, which should give us 20000 of each. We have more than enough male panelists available (27620), however we have only 18122 females, giving us a shortage of 1878 females. The total target is therefore reduced from 40000 to 38122 (40000-1878=38122). The weight ratio for females is recalculated (18122/38122=0,4754 or 47.5%), and the weight ratio for males is also adjusted accordingly (20000/38122=0.5246 or 52.5%).

Summary Report

Demo Set	Row	Available		Requested Target		Adjusted Target		Final Target	Actual		H/L (+/-)	
Total	Total	45,742		40,000		40,000			38,122		-1,878	
1) GenderAdjustWeightTargets												
Non collapsing adjust targets	1) Male	27,620	60.4 %	20,000	50.0 %	20,000	50.0 %	52.5 %	20,000	52.5 %	0	0.0 %
	2) Female	18,122	39.6 %	20,000	50.0 %	20,000	50.0 %	47.5 %	18,122	47.5 %	-1,878	-9.4 %

Figure 218 Example of the results when Collapse Type is set to Non-Collapsing Adjust Targets

7.2.2.4. Non-Collapsing Keep Targets

Target sample outgo is reduced by the amount needed to accommodate the original segment target for a segment with shortage. All segment targets are kept.

For example: Assume we are asking for 40000 panelists, divided evenly as 50% females and 50% males. In this case we have more than enough (27620) male panelists, but we have only 18122 females. This gives us a shortage of 1878 females. To keep the 50/50 weight-ratio the male target is also reduced by 1878, so the final target sample outgo is therefore reduced to 36244.

Summary Report

Demo Set	Row	Available		Requested Target		Adjusted Target		Final Target	Actual		H/L (+/-)	
Total	Total	45,742		40,000		40,000			36,244		-3,756	
1) GenderKeepWeightTargets												
	1) Male	27,620	60.4 %	20,000	50.0 %	20,000	50.0 %	50.0 %	18,122	50.0 %	-1,878	-9.4 %
	2) Female	18,122	39.6 %	20,000	50.0 %	20,000	50.0 %	50.0 %	18,122	50.0 %	-1,878	-9.4 %

Figure 219 Example of the results when Collapse Type is set to Non-Collapsing Keep Targets

7.2.3. The Weights Tab

The segments within a dimension must be weighted. For example, if you are going to use the Gender dimension with its Male and Female segments, then you must specify the male-to-female ratio that you want in the result. You can create several weighting sets for a dimension, though only one weight set can be used on a dimension per sample.

Use this tab to create a new Weight set for a dimension, and see and/or edit the details of existing weights.

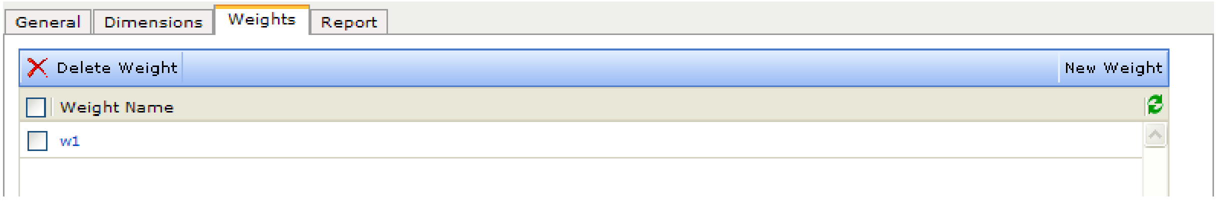


Figure 220 Example of the Weights tab Weight List

The toolbar buttons are:

- **Delete Weight** – deletes selected Weights.
- **New Weight** – creates a new Weight for the current Dimension.
- **Refresh** – refreshes the display. This may be required in the event changes have been made to the list that are not displayed immediately.

Click on a Weight Name in the list to open the details page for that weight.

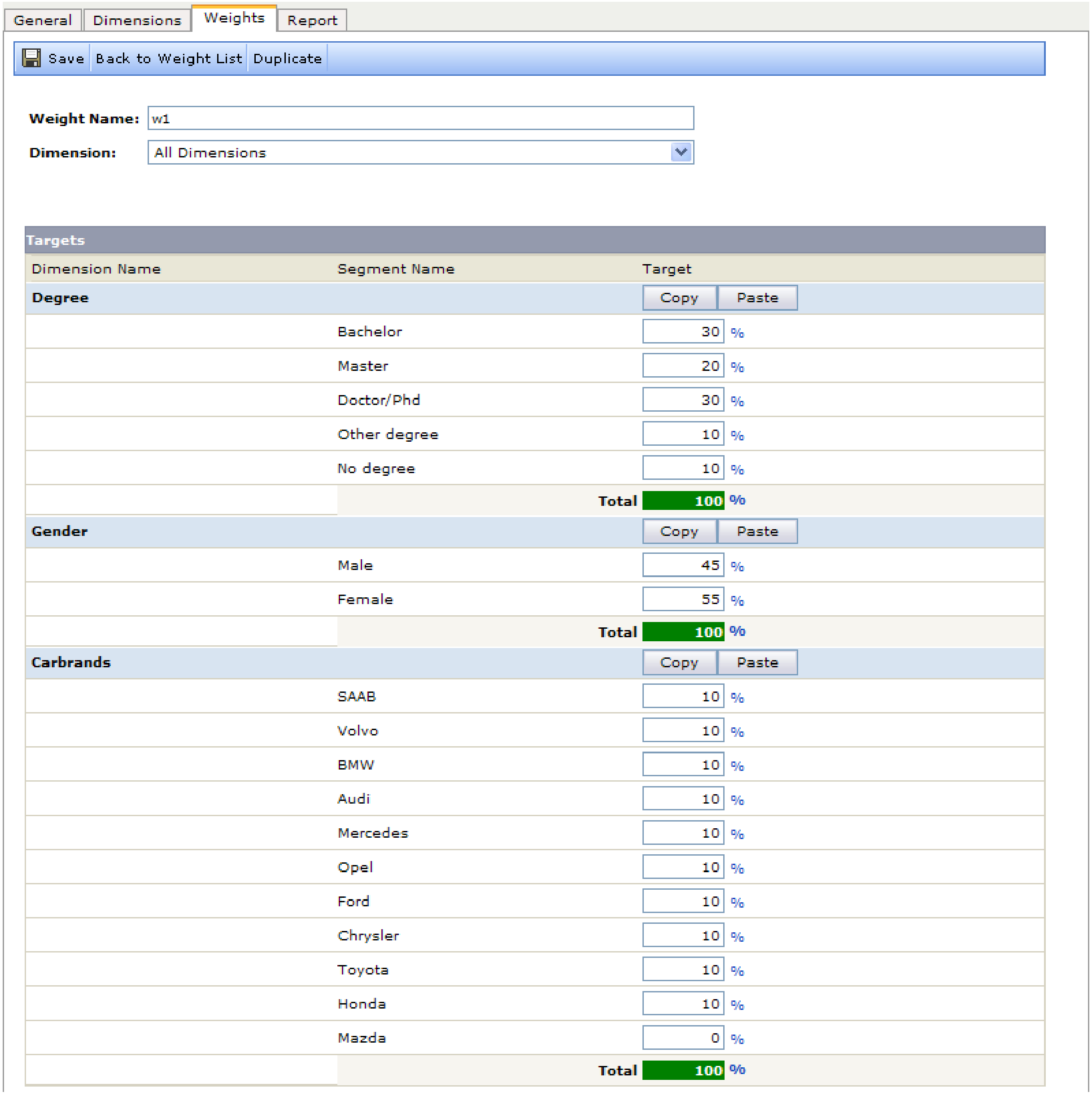


Figure 221 Example of a Weight Details page

The toolbar buttons and data fields are:

- **Save** – saves changes for the tab. The button flashes while Forsta Plus has unsaved changes.
- **Back to Weight List** – closes the details page for the Weight and returns you to the Weight List.
- **Duplicate** – creates a copy of the current Weight. The new Weight is given the name Copy of (selected weight).
- **Weight Name** – the name of the currently selected Weight.
- **Dimension** – if you only wish to view one of the dimensions listed, use this drop-down list to filter out the other dimensions. Otherwise, select All Dimensions to view all.

Here you can specify the weights to be applied to each individual segment in the weight set (see How to Create a Weight Set on page 183 for more information).

7.2.4. The Report Tab

This tab shows details of the dimensions and weights used in the current matrix.

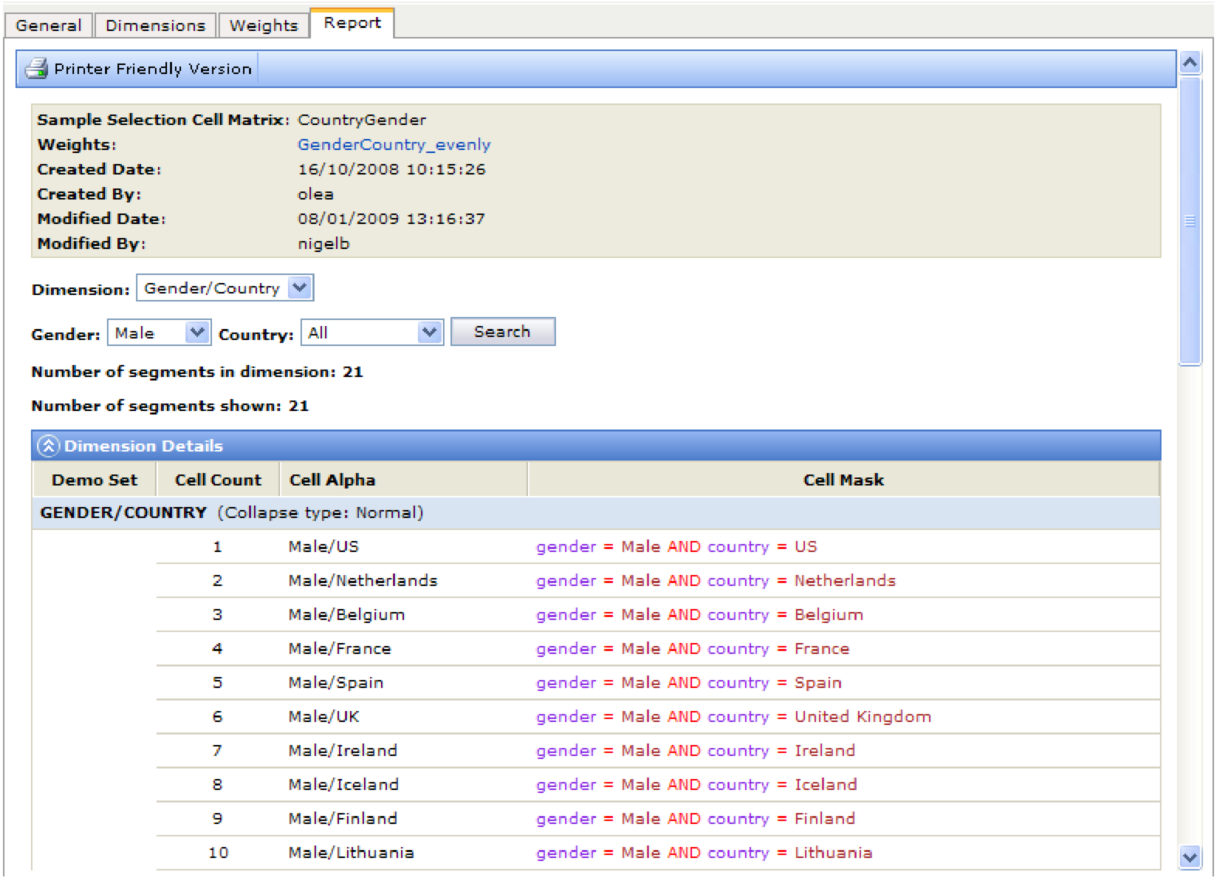


Figure 222 Example of the Report tab

The tab has the following button in the toolbar:

- **Printer and Save Friendly version** – opens a new window containing a printer- and save-friendly version of the report.

The Weights links in the upper section of the tab allow you to jump down to the corresponding detail lists for the weight.

When dimensions have been combined (see The Dimensions Tab on page 174 for more information), the Dimension drop-down field is displayed. Here you can filter the dimension details to show only those for the dimensions you select.

Click the chevron buttons in the header bar for each section (see the Dimension Details bar in the figure above) to collapse and expand the section.

7.2.5. Procedures in the Current Matrix Tab

7.2.5.1. How to Duplicate a Matrix

1. Click the **Duplicate** button in the General tab's toolbar.

   A copy of the current matrix is created and its details are displayed in the General tab.

2. Click in the Matrix Name field and type in a name for the new matrix.
3. Click **Save** to save the changes.

   The new matrix is added to the Matrix List. You can now edit the matrix as required and use it in a job.

7.2.5.2. How to Validate a Matrix

1. Click the **Validate Matrix** button in the General tab's toolbar.

   Forsta Plus checks the matrix and presents a result message as appropriate.

Figure 223 Example of a matrix validation error message

If the matrix is found to be correctly constructed and is approved, the following message is displayed.

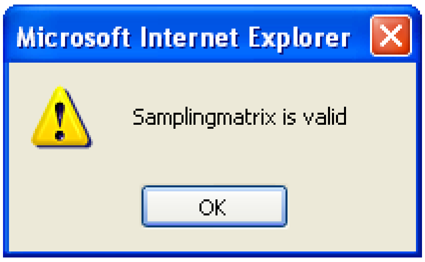


Figure 224 The "matrix is valid" message.

2. Click **OK** to close the message.

7.2.5.3. How to Create a New Dimension

1. Click the **New Dimension** button located at the right end of the Dimensions tab toolbar.

   The Dimension Name dialog opens.

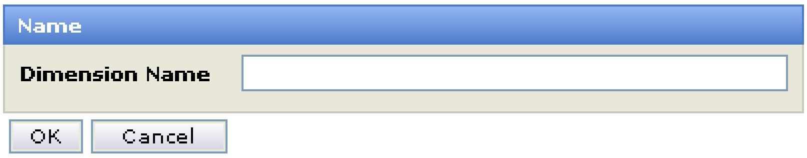


Figure 225 The Dimension name dialog

2. Type a name for the dimension into the Dimension Name field.
3. Click **OK**.

   The Edit Dimension Details window for the new dimension opens.

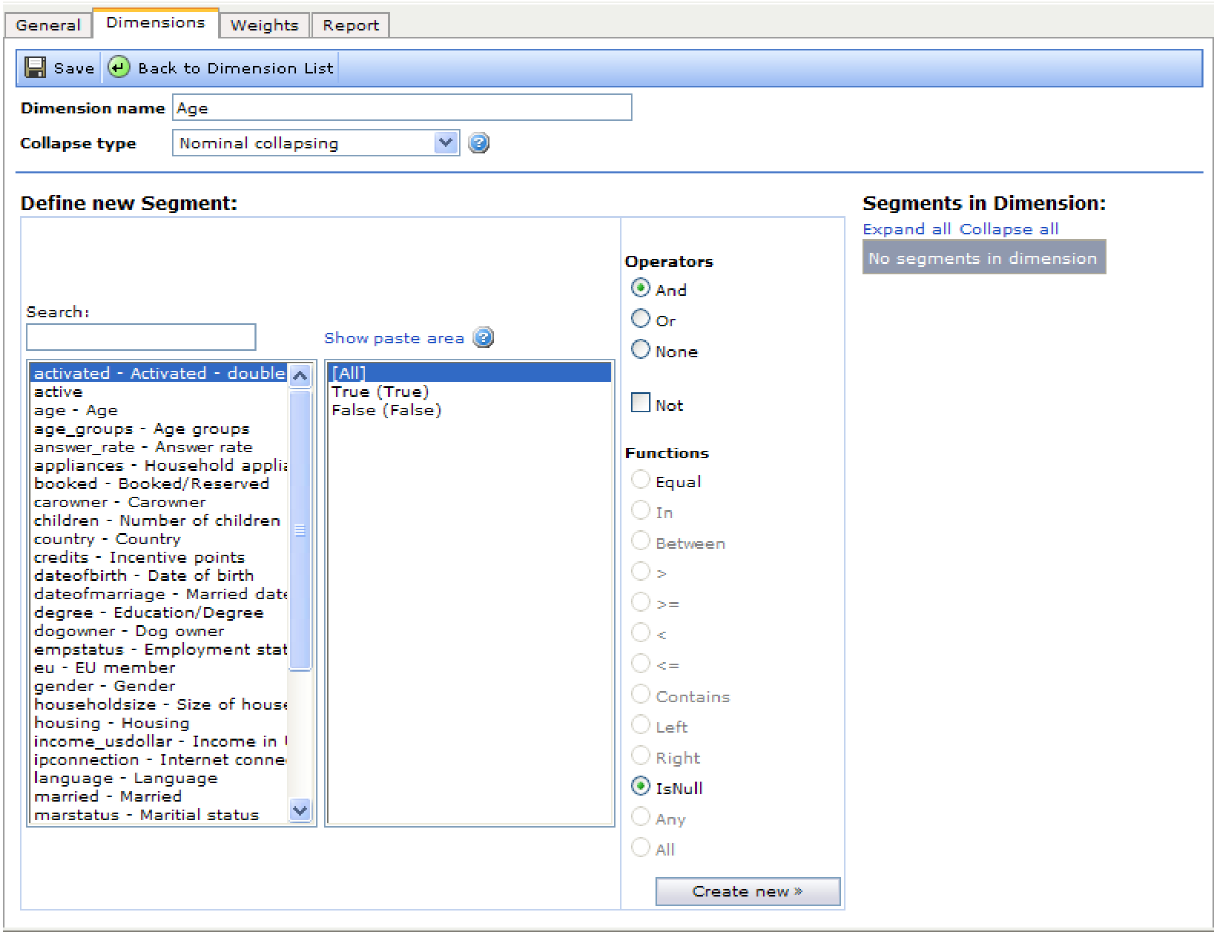


Figure 226 Example of the Edit Dimension window

4. In the variable list (the left column), using the Search function as necessary, find and select the variable you wish to add to the dimension.

   The possible values for the selected variable are presented in the second column. These change as appropriate to reflect the selected variable. You can add as many variables to a segment as required.

5. In the second column, select the required values for the variable.

6. In the third column select the required operator and function.

Note: The operator for the first variable selected must be None.

7. Click **Create New**.

   The segments are added to the dimension and are listed in the Segments in Dimension column.

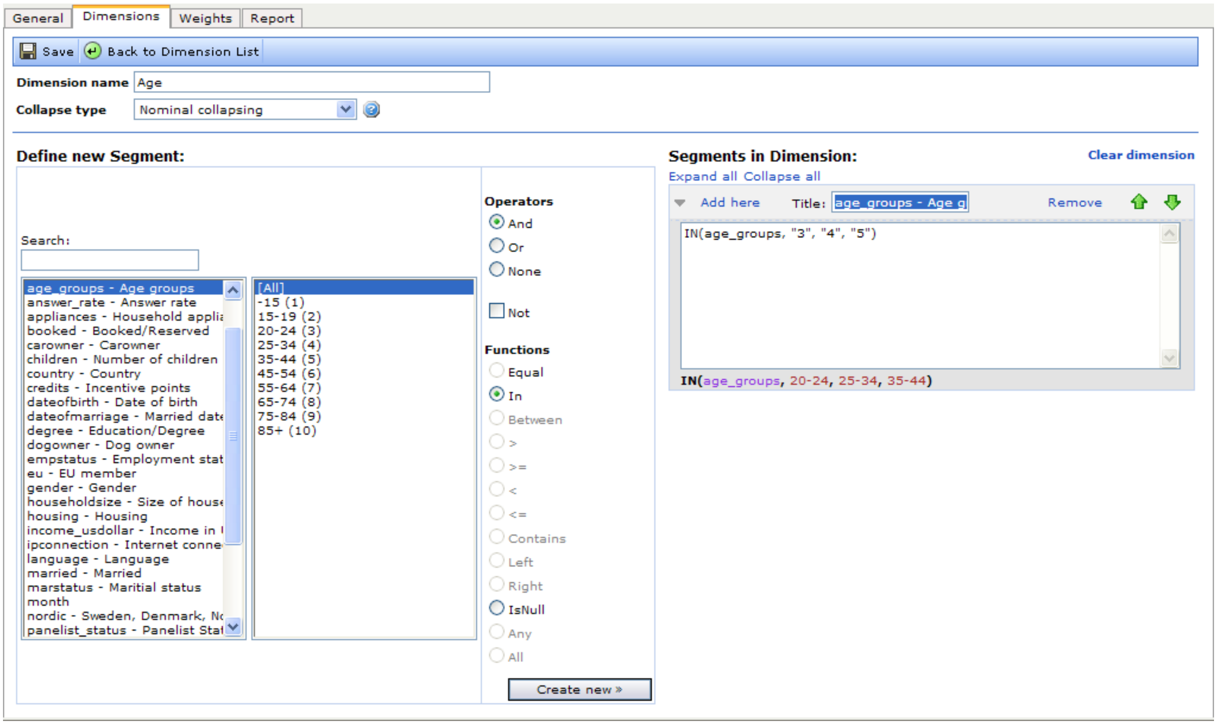


Figure 227 Example of segments in a dimension

8. Save the changes.

Note: If the dimension you are working with is part of a Combined dimension (see Combined Dimensions on page 185 for more information), the Up to Parent button is included in the toolbar. Click this button to go to the Edit Dimension page for the combined dimension (see The Dimensions Tab on page 174 for more information).

7.2.5.4. How to Create a Weight Set

1. In the **Sample Management > Current Matrix > Weights** tab, click the **New Weight** button located towards the right side of the tab toolbar.

   The Weight Name dialog opens.

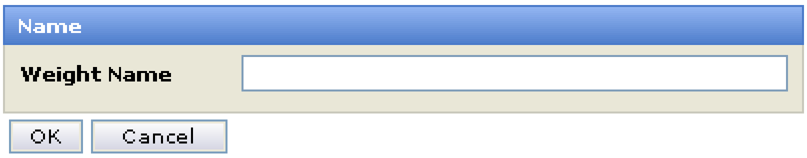


Figure 228 The Weight Name dialog

2. Type a name for the new weight into the data field and click **OK**.

   The Details page for the new weight opens.

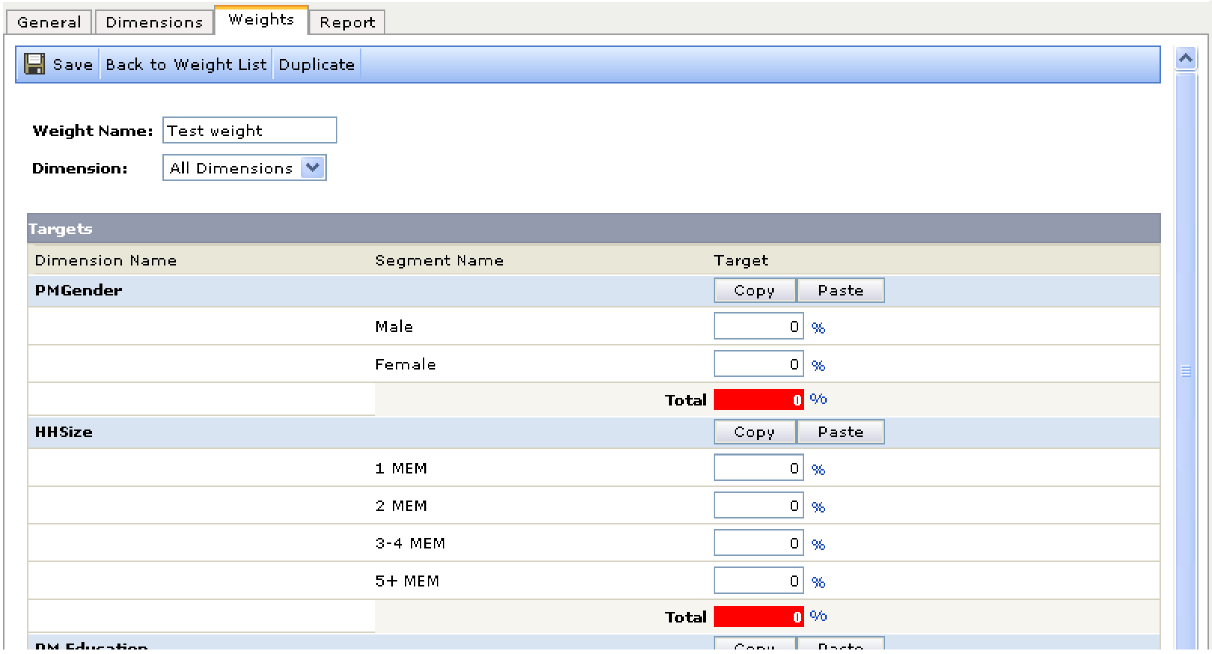


Figure 229 Example of the Details page for a new weight

The target column fields are blank and must be filled in. Note that the Total fields (currently red) for each set of rows must sum to 100%. When this is correct, the field will turn green.

3. Type or copy the appropriate values into the Target fields.
4. Click the down-arrow beside the Dimension field to open a drop down list of the options available, and select the required dimension from the list.

   Each Dimension row has a **Copy** and a **Paste** button. Click **Copy** to copy the target weights for the dimension to the clipboard. Click **Paste** for a different dimension to paste the target weights into that Dimension's weight fields.
5. When all the target weight fields are correctly filled in, click **Save** to save the details.

The weight is saved and added to the Weights list. In the event some target weights are not filled in correctly, an error message will be displayed.

7.2.5.5. How to Delete a Weight Set

To delete unnecessary weight sets:

1. Go to the **Sample Management > Current Matrix > Weights** tab, Weights list.
2. Find the weight set you wish to delete, and click in the corresponding box to select it.
3. Click **Delete Weight**.

   A confirmation message box opens.
4. Click **OK** to delete the weight, or **Cancel** to close the message box without deleting the weight.

7.2.5.6. How to Export a Matrix

You may wish to export a matrix from the current server so it can be used on a different server. A matrix is exported on an email as an **.xml** file. To export a matrix:

1. Click the **Export** button in the General tab's toolbar.

   The Matrix Export dialog opens.

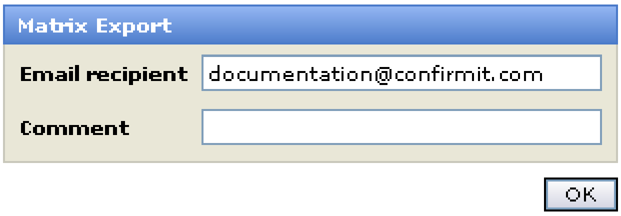


Figure 230 The Matrix Export dialog

2. The default email address is that of the current user. Change as necessary.
3. Type any comments into the Comment field.
4. Click **OK**.

   The matrix is sent as an **.xml** file attached to an email. It can now be imported into a different server. To import a matrix that has been exported from a different server, see section (see How to Import a Matrix on page 194 for more information).

7.2.5.7. Combined Dimensions

Dimensions can be combined to provide a detailed list of the weights applied to the various combinations of segments. This then allows you to go in and make fine adjustments to the combined weights to achieve the sample you require.

The figure below shows a dimensions list with three separate dimensions.

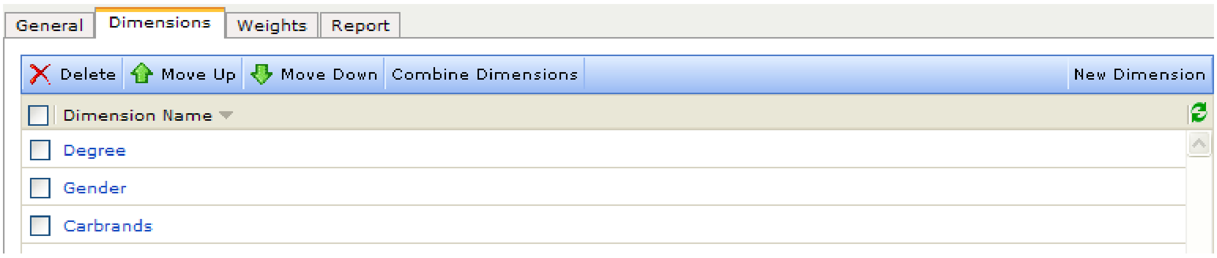


Figure 231 Example of a dimensions list containing three separate dimensions

Each of these dimensions can comprise several segments (click on the blue **Dimension Name** link to open its Edit Dimension page).

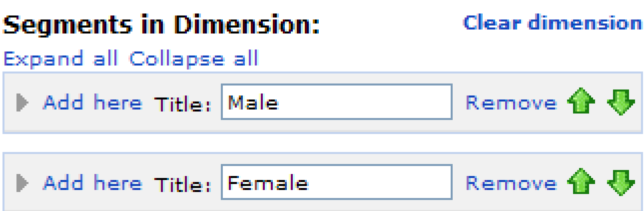


Figure 232 The segments in the Gender dimension

And each segment can have a specified weight (see The Weights Tab on page 177 for more information). To combine dimensions:

1. Select two or more dimensions in the dimension list and click the **Combine Dimensions** button to combine the selected dimensions.

   The result is as shown in the example below.

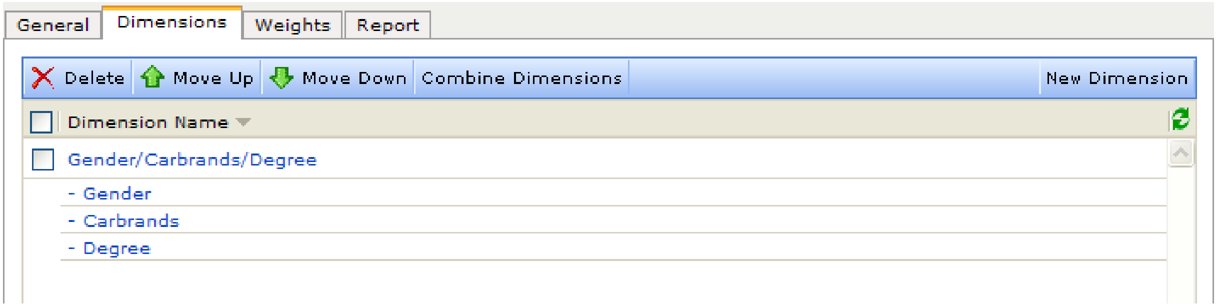


Figure 233 Example of three dimensions combined into one

Click on the "group name" (in this case the **Gender/Carbrands/Degree** link) to view the full list of all the combinations of segments in the combined dimension. Click on an individual dimension name (for example **Gender**) to open the Edit Dimension page for that dimension.

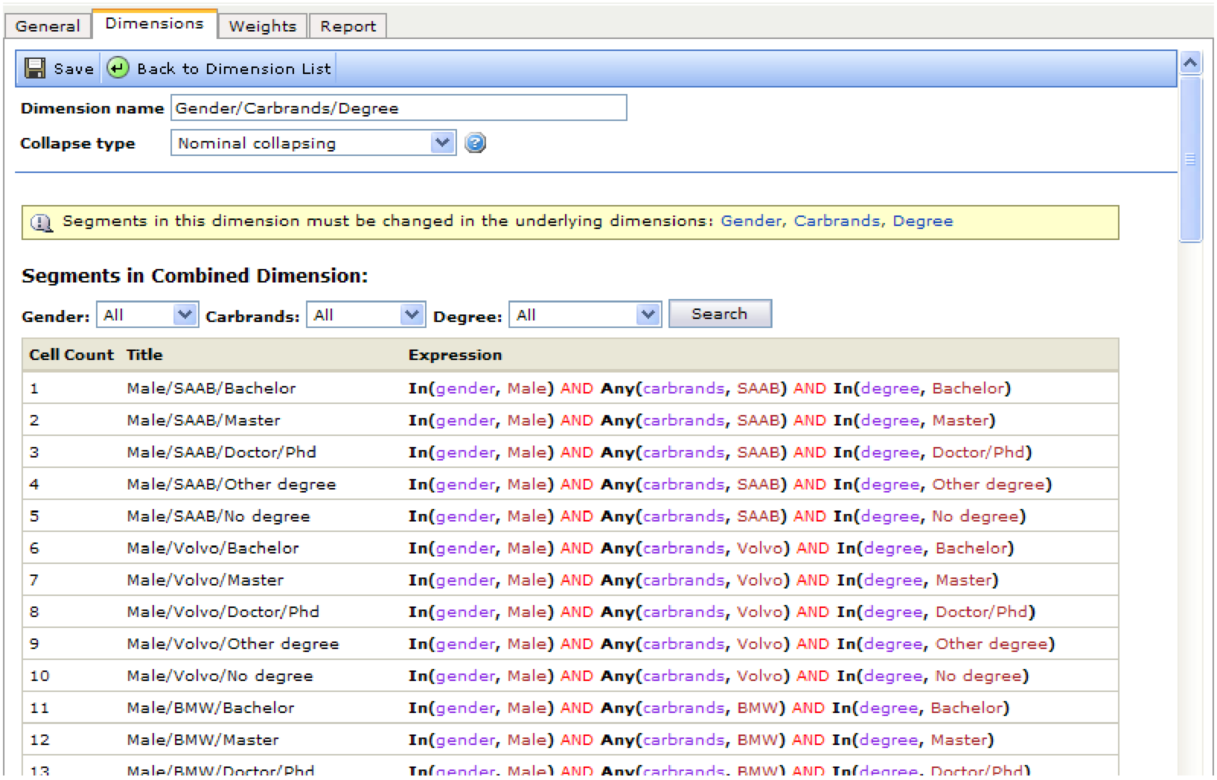


Figure 234 A small part of the segment list for a combined dimension. This list contained 110 cells

Go to the Weights tab and click on a **Weight Name** link to open the Weight list for the combined dimension.

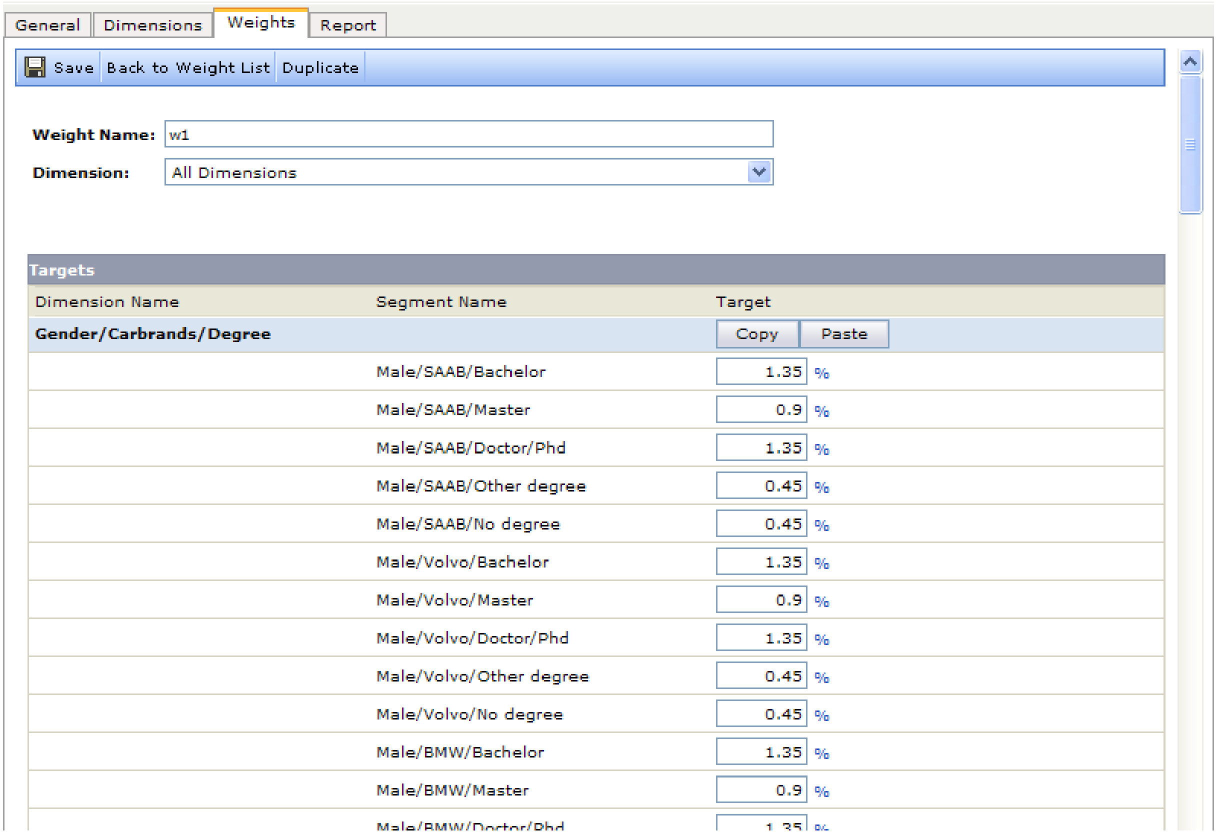


Figure 235 The weights for the same small part of the combined dimension's segment list

The weights listed here are initially calculated automatically by the system when the dimensions are combined, and are the results of the combination of the weights specified for each individual segment. For example in the first row, the individual weights you have specified for the separate Male, SAAB and Bachelor segments, when combined and calculated against the specified weights for all the other rows in the list, will result in 1.35% of the total sample being males who both drive a SAAB and have a Bachelor's degree. You can now make fine adjustments to the targets.

Note that the full list must always total 100%; the Total cell at the bottom of the list will then be green. In the event the list does not total 100% the cell will be red.

Note: To change the order of the weight list here, you must "uncombine" the dimensions (see How to Uncombine a Dimension on page 187 for more information), select the appropriate dimension and use the Move Up and/or Move Down buttons to position the dimension as desired in the dimension list, then recombine them.

7.2.5.8. How to Uncombine a Dimension

You may wish to remove a dimension from the combined set, for example to adjust its segments' weights independently of the other dimensions in the combination. To do this:

1. Go to the Dimensions tab.
2. Click on the dimension you wish to remove to open it's Edit Dimension page.
3. Click **Uncombine**.

   A confirmation dialog opens.
4. Click **OK** to continue.

   This will release the dimension from the combination, and the released dimension will then be listed separately from the remaining combined dimensions in the Weights and Dimensions tabs.

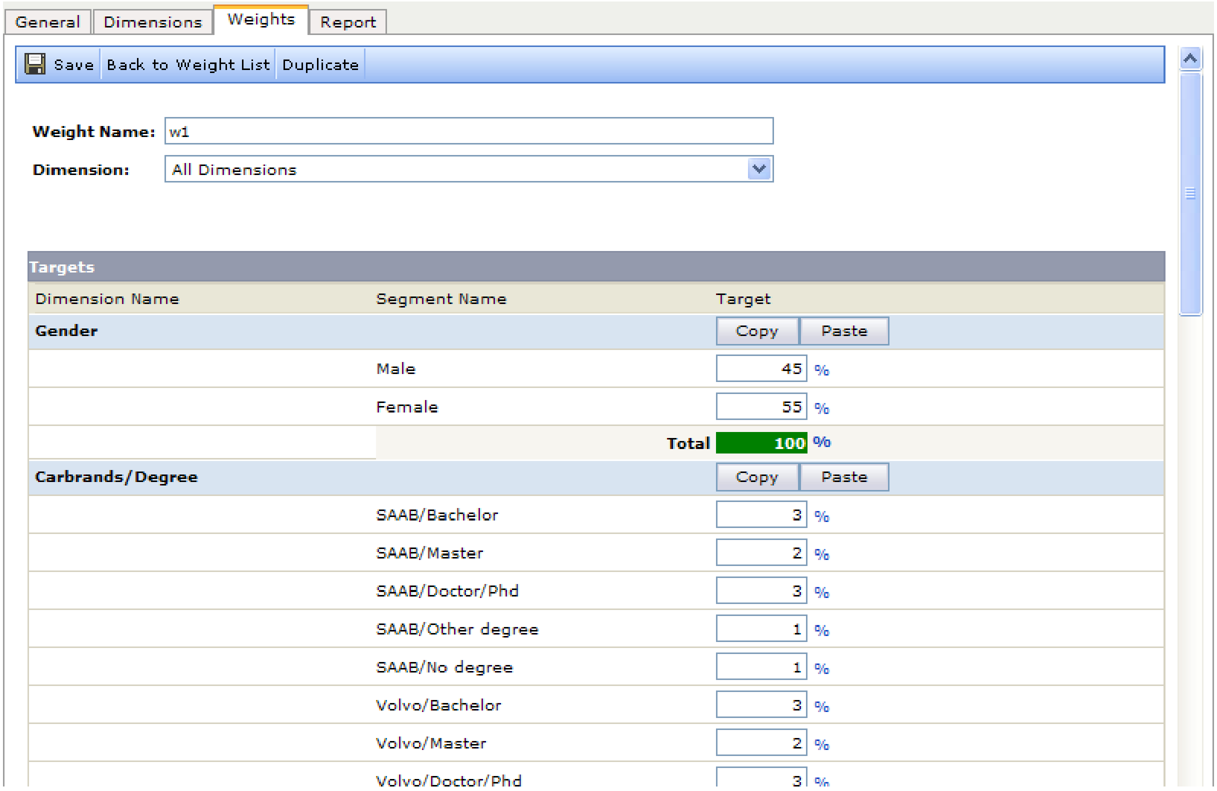


Figure 236 The Weights tab with Gender dimension released from the combination

The weights for the remaining segments in the combination will be recalculated automatically, and the released dimension will be given the same weights it originally had before it was included in the combination. You can later recombine the dimensions as necessary.

7.3. Job List

This window lists all the sampling jobs that you currently have “in progress”. Once a job is complete, the sample is linked to the survey and the panelists are invited to respond, then the job is moved to the Active Job List (see Active Job List on page **Error! Bookmark not defined.** for more information).

Use the filters to find the job you are interested in and click on the blue link in the Job Number column to select it. You will be taken automatically to the Current Job window.

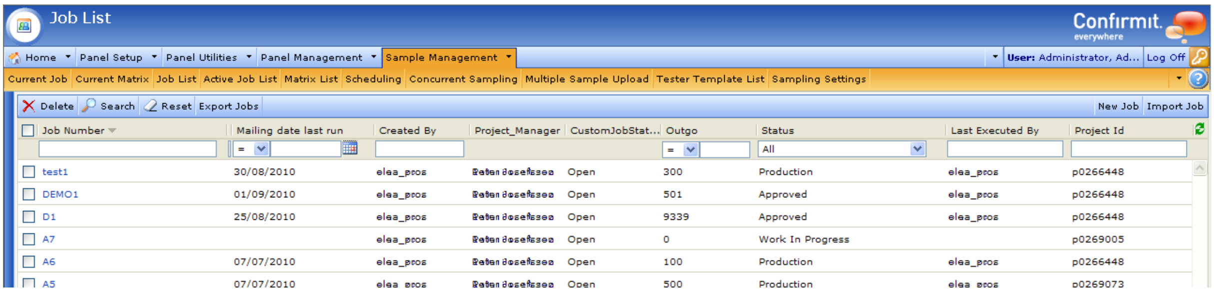


Figure 237 Example of the Job List window

Note: If you open a job, then return to the Job List and open a different job, an information box appears warning you that you are about to change jobs. Click OK to continue and change jobs, or Cancel to cancel the change and remain with the current job.

7.3.1. The Job List Filters

In an established company the list of registered jobs may run into thousands, and a search through the list for the one job that you wish to select for exclusion or relaxation could be time-consuming. Forsta Plus therefore provides you with a set of filters so you can reduce a long list to a manageable size.

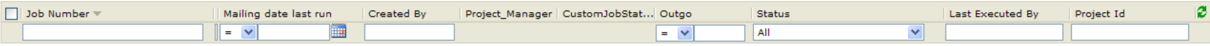


Figure 238 The Job List filter bar

- **Job Number** – type in the number of the job you are looking for, then click **Search**. You can use the * character as a wildcard, and type in part of the number. For example, type in 123 to find all jobs where the job number starts with 123, such as job number 123456. Typing in *123 will find all jobs with the number 123 somewhere in the job number, such as job number 45123678.
- **Mailing Date last run** – allows you to search for jobs according to the date on which they were mailed. Click the drop-down arrow beside the operator field and select the required operator, then click on the calendar icon beside the field and select the date. When you are ready, click **Search**. For example, select the **<=** operator and a date to list all the jobs that were mailed on or before the selected date.
- **Created By** – allows you to search for jobs created by specific users. Type the user's identification (as used by Forsta Plus) into the field, or use standard Windows copy and paste functionality, and click **Search**.
- **Project Manager** - allows you to search for jobs by specific project managers.
- **CustomJobStatus** - allows you to search for jobs by specific job statuses.
- **Outgo** - allows you to search for jobs based on the number of emails sent. Select the desired operator and click **Search**.
- **Status** – allows you to search for jobs according to their current status. Click the drop-down arrow beside the field to open a list of the statuses, select the one required and click **Search**.
- **Last Executed By -** allows you to search for jobs based on the user who last executed them Type the user name of the desired user into the field.
- **Project ID -** allows you to search for jobs based on the ID of the project to which they apply.
- **Alphabetical Filter** – the letters of the alphabet are listed along the lower edge of the window. Click a letter to show only those jobs in which the Description starts with the selected letter. Click **All** to show all jobs.

Note: You can use any combination of the above filters to find the required job. For example you can perform a search to find all the jobs with a particular status that were modified before a given date and that were created by a particular person. You can set all the filters and then perform the search, or you can perform separate searches using one filter at a time. Click Reset to remove all search criteria and display the full list.

7.3.2. The Job List Toolbar

- **Delete** – delete the selected job(s).
- **Search** – commence a search based on the selected filter criteria.
- **Reset -** click to remove all search criteria and display the full list.
- **Export Jobs** - select the jobs you wish to export and click this button to commence the export task.
- **New Job** – create a new job.
- **Import Job** – import a job that has previously been exported, for example when you wish to copy a job from another server into this server.

7.3.3. Procedures in the Job List Window

7.3.3.1. How to Create a New Job

This function allows you to create a new job from the bottom up. Note that you can also create new jobs by duplicating existing jobs (see the **Current Job > Job Information tab** section) and by importing jobs from other servers (see How to Import a Job on page 190 for more information).

1. Click the **New Job** button located towards the right end of the Job List toolbar.

   The New Job Properties dialog box opens.

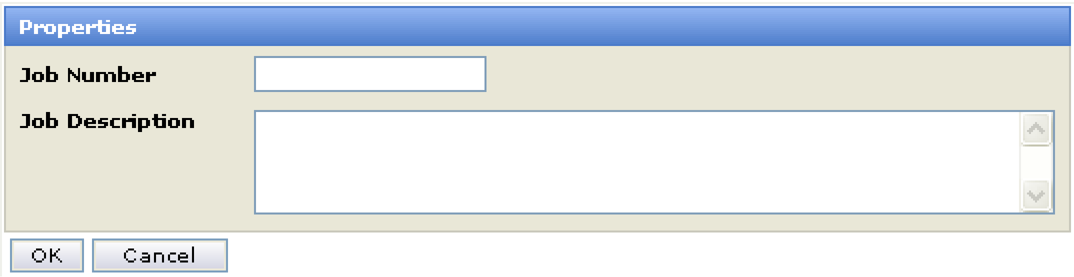


Figure 239 The New Job Properties dialog box

2. Type in a unique job number.

Note: The Job Number can only include letters, numbers and underscore (_). Do not use space or special characters (for example &, /, # etc.).

3. Type a description of the job into the Description field.

   Note that the first letter used in this description will be used in the alphabetical filter.

4. Click **OK**.

   The job is created and added to the job list. You can now select the new job and go to the **Current Job** window to set the details and panelist selection criteria.

7.3.3.2. How to Import a Job

Use this function to import a job that has for example been created on a different server and exported to a file (see also section (see How to Export a Job on page 127 for more information)).

1. Click the **Import Job** button located towards the right end of the Job List toolbar.

   The Job Import dialog box opens.

Figure 240 The Job Import dialog box

2. Click **Browse** to open a standard Windows browse dialog box, and find the file you wish to import.
3. Type a unique job number into the Job Number field.
4. Click **OK**.

   The file is imported and added to the Job List. You can now select it in the Job List and go to Current Job to edit it.

7.3.3.3. *How to Delete a Job*

Jobs that are no longer needed can be deleted from the system. Note that once a job has been deleted it cannot be undeleted, you will need to rebuild it. You can delete any number of jobs simultaneously.

1. Go to the **Sample Management > Job List** menu comment.

   The Job List window opens.

2. Find the job or jobs you wish to delete.
3. Click in the check boxes for those jobs to select them.
4. Click **Delete**.

   The selected files are permanently deleted.

7.4. Active Job List

This window lists all the sampling jobs that are currently “in production”. Once a job is complete, the sample is linked to the survey and the panelists are invited to respond, then the job is moved to this list from the Job List.

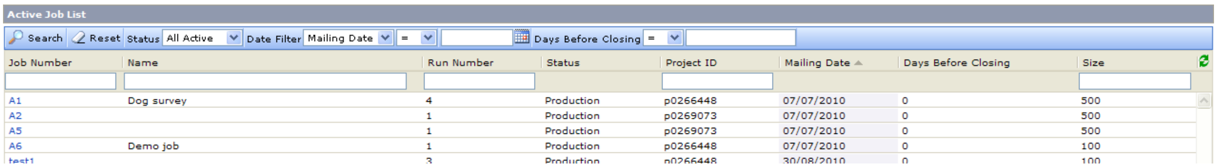


Figure 241 Example of the Active Job List

7.4.1. The Search Fields

You may have a large number of jobs that are active simultaneously, and a search through the list for the one job that you wish to view could be time-consuming. Forsta Plus therefore provides you with a set of filters so you can reduce a long list to a manageable size.

- **Status** – allows you to search for jobs according to their current status. Click the drop-down arrow beside the field to open a list of the statuses, select the one required and click **Search**.
- **Date Filter** – use to find active jobs based on their dates. Select the “type” of date you are looking for, for example the mailing date, select the operator, for example **<** will give all dates less than (before) the selected date, and select a date, then click **Search**.
- **Days Before Closing** – use to find active jobs based on the number of days remaining before the survey closes. Select the operator, for example **>** will give all jobs with more than the specified number of days remaining, and type in the number of days, then click **Search**.

7.4.2. The List Columns

- **Job Number** – the number of the job. Click the link to open the Active Job Details page for the job (see The Active Job Details Page on page 192 for more information).
- **Name** – the name of the job.
- **Run Number** - a sampling job can be run any number of times, allowing you to check the results and adjust the parameters to achieve the desired sample. This column displays the run number for the sampling job.
- **Status** – indicates the current status for the job.
- **Project ID** – the identification number of the survey project to which the sample is attached.
- **Mailing Date –** presents the date on which the survey was mailed to the respondents in this sample.
- **Days Before Closing** – the number of days that this survey and sample will remain active before closing.
- **Size –** the number of panelists specified for this sampling job.

7.4.3. The Active Job Details Page

Click on a blue **Job Number** link in the Active Job List to open the Active Job Details page for that job, as shown in the example below.

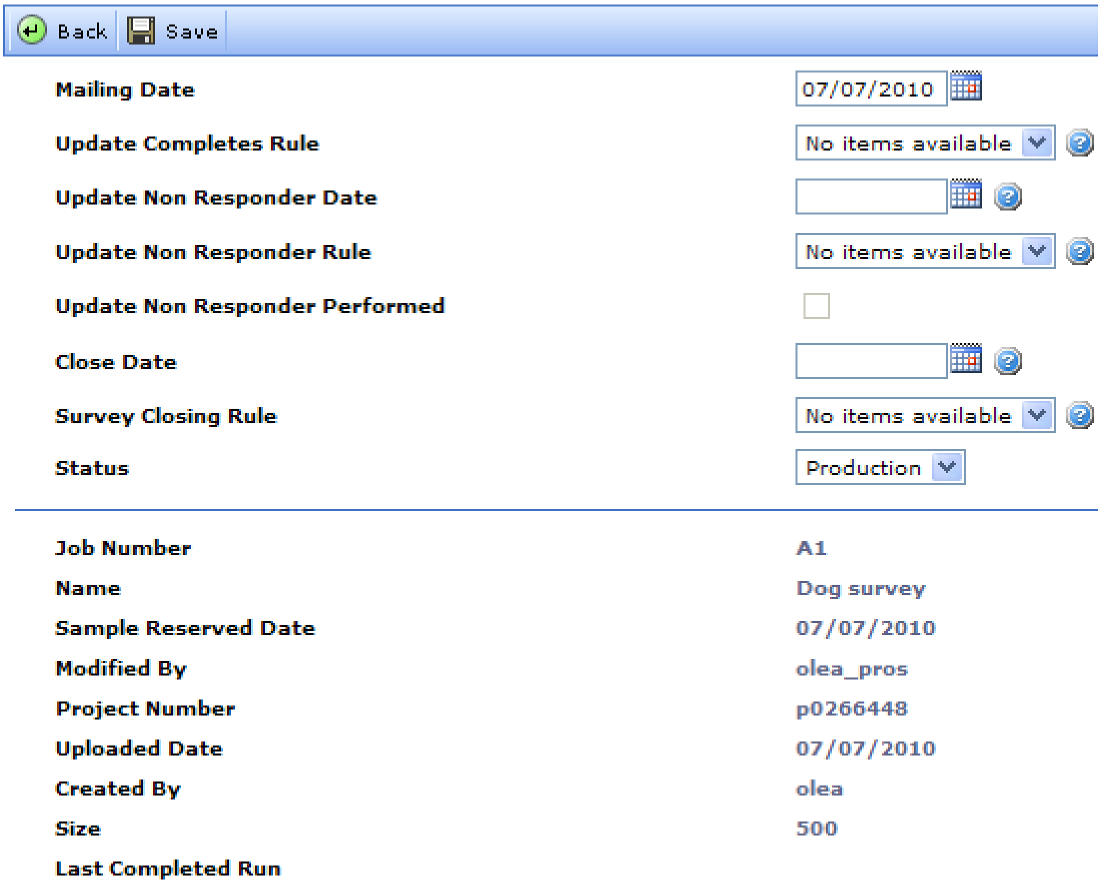


Figure 242 Example of an Active Job Details page

The properties and data fields are as follows:

- **Mail Date** - the date the survey is to be emailed to the selected respondents.
- **Update Completes Rule** - this field displays the rule that is to be used to define what is to happen when a respondent completes the survey. If you wish to change the rule that is to be used, click the down-arrow and select the required rule from the list available.
- **Update Non-Responder Date** - this is the date by which the respondents are to have completed the survey. If a respondent has not completed the survey by the specified date, then the rule specified below will be implemented. If you wish to change the date, click the **Calendar** button and select the required date.
- **Update Non-Responder Rule** - this field displays the rule that is to be used to define what is to happen when a respondent has not completed the survey by the specified date. If you wish to change the rule, click the down-arrow and select the required rule from the list available.
- **Update Non-Responder Performed** - once the Update Non Responder Rule has been performed, this box is checked by the system to indicate completion.
- **Close Date** - the date the survey is closed for the sample. If you wish to change the date, click the **Calendar** button and select the required date
- **Survey Closing Rule - this field displays the rule that is to be used to define what is to happen when the survey is closed. If you wish to change the rule that is to be used, click the down-arrow and select the required rule from the list available.**

- **Status** - the current status for the job. If you wish to change this status, click the down-arrow and select the desired status from the drop-down list.

7.5. Matrix List

This window lists all the matrices currently available in your database.

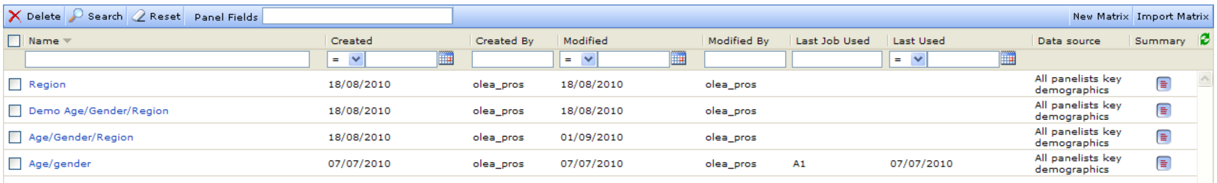


Figure 243 Example of the Matrix List

The list of matrices may be extensive, so Forsta Plus provides you with a set of filters so you can reduce a long list to a manageable size. The filter fields are:

- **Panel Fields –** allows you to search for matrices based on specified panel fields, for example all matrices with Age as or in a dimension.
- **Name** – type in the name of the matrix you are looking for, then click **Search**. You can use the * character as a wildcard, and type in part of the name.
- **Created** – enables you to search for matrices depending on when they were created. Click the drop-down arrow beside the operator field and select the required operator, then click on the calendar icon beside the field and select the date. When you are ready, click **Search**. For example, select the **>** operator and a date to list all the matrices that were created after the selected date.
- **Created By** – allows you to search for matrices created by specific users. Type the user's identification (as used by Forsta Plus) into the field, or use standard Windows copy and paste functionality, and click **Search**.
- **Modified** – enables you to search for matrices depending on when they were last modified. Click the drop-down arrow beside the operator field and select the required operator, then click on the calendar icon beside the field and select the date. When you are ready, click **Search**. For example, select the **>=** operator and a date to list all the matrices that were modified on or after the selected date.
- **Modified By** – allows you to search for matrices modified by specific users. Type the user's identification (as used by Forsta Plus) into the field, or use standard Windows copy and paste functionality, and click **Search**.
- **Last Job Used** – allows you to search for matrices according to the job they were last used with. Type or copy the job ID into the field and click **Search**.
- **Last Used** – enables you to search for matrices depending on when they were last used. Click the drop-down arrow beside the operator field and select the required operator, then click on the calendar icon beside the field and select the date. When you are ready, click **Search**. For example, select the **<=** operator and a date to list all the matrices that were used on or before the selected date.
- **Summary**– click on the icon to view a summary of the dimensions included in the matrix.

Note: You can use any combination of the above filters to find the required matrix. For example you can perform a search to find all the matrices that were created before a given date and that were created by a particular person. You can set all the required filters and then perform the search, or you can perform separate searches using one filter at a time.

Across the bottom of the window is an alphabetic filter – click a letter to display only those matrices in which the Name starts with the selected letter. Click **Reset** to remove any search criteria and display the full list.

7.5.1. Procedures in the Matrix List Window

7.5.1.1. How to Create a New Matrix

1. In the Matrix List window, click the **New Matrix** button located towards the right end of the toolbar.

   The New Matrix dialog box opens.

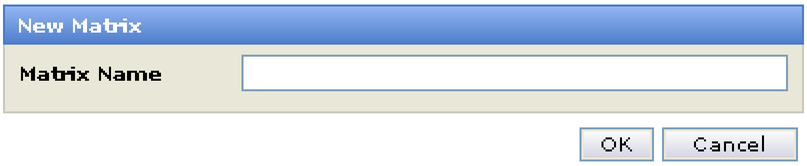


Figure 244 The New Matrix dialog

2. Type a name for the new matrix into the Matrix Name field.
3. Click **OK**.

   The **Sample Management > Current Matrix** window opens at the General tab.

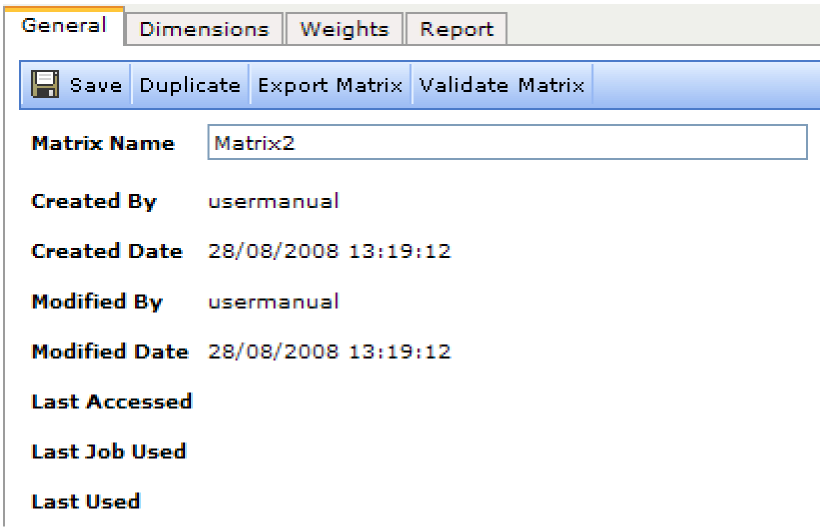


Figure 245 Creating a new matrix

You now need to define the dimensions and segments for the matrix (see Current Matrix on page 173 for more information)

7.5.1.2. How to Import a Matrix

You may wish to import a matrix from a different server. A matrix is exported from a server as an **.xml** file attached to an email. See section (see How to Export a Matrix on page 184 for more information) for further details on exporting.

1. Open the email and save the attached **.xml** file to a logical folder on your server.
2. Open Forsta Plus and go to the **Sample Management > Matrix List** menu command.

   The Matrix List window opens.
3. Click the **Import Matrix** button located in the upper right corner of the Matrix List window.

   The Matrix Import dialog opens.

Figure 246 The Matrix Import dialog box

4. Click **Browse** to open a standard Windows file selection dialog, browse to the .xml file and select it, then click **Open**.

   The .xml file name is added to the File to Upload field.

5. Type a logical name for the matrix into the Matrix Name field.

   This name will be displayed in the Matrix List window.

6. Click **OK**.

   The matrix file is uploaded and added to the matrix list. You can now edit the matrix as required and add it to a job (see Current Matrix on page 173 for more information).

7.6. Scheduling

This window lists the jobs that are awaiting execution and those that have been run. To open the Scheduling window, go to the **Sample Management > Scheduling** menu command.

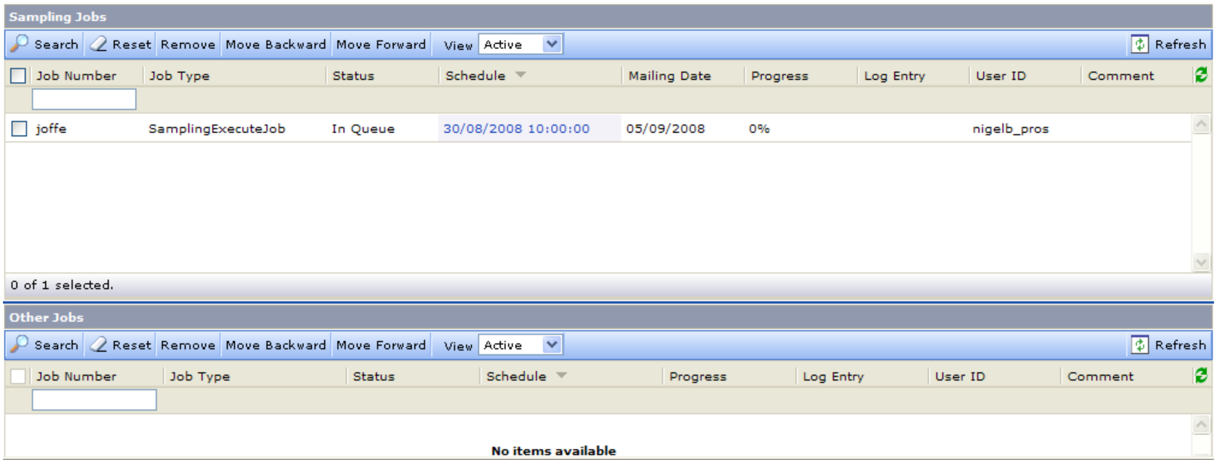


Figure 247 Example of the Scheduling window

The window contains two lists:

- **Sampling Jobs** – the queue of sampling jobs that are waiting to be run.
- **Other Jobs** – support jobs, such as importing files or exporting to a different server.

Both the lists have the following buttons and options:

- **Search –** type search criteria into the job number field then click **Search** to reduce the list to only those jobs answering to the criteria.
- **Reset -** click to remove all search criteria and display the full list.
- **Remove** – click to delete a selected job from the list.
- **Move Backward** – moves the selected job to 1 minute after the next job in the list.
- **Move Forward** – moves the selected job to 1 minute before the previous job in the list.
- **View** – select Active or Inactive.
- **Refresh** – click to update the lists.

7.6.1. The Sampling Jobs List

The **Sampling Jobs > Active** list contains those jobs that are waiting to be run.

1. Click the link in the Schedule column to open the Task Scheduling window for the job.

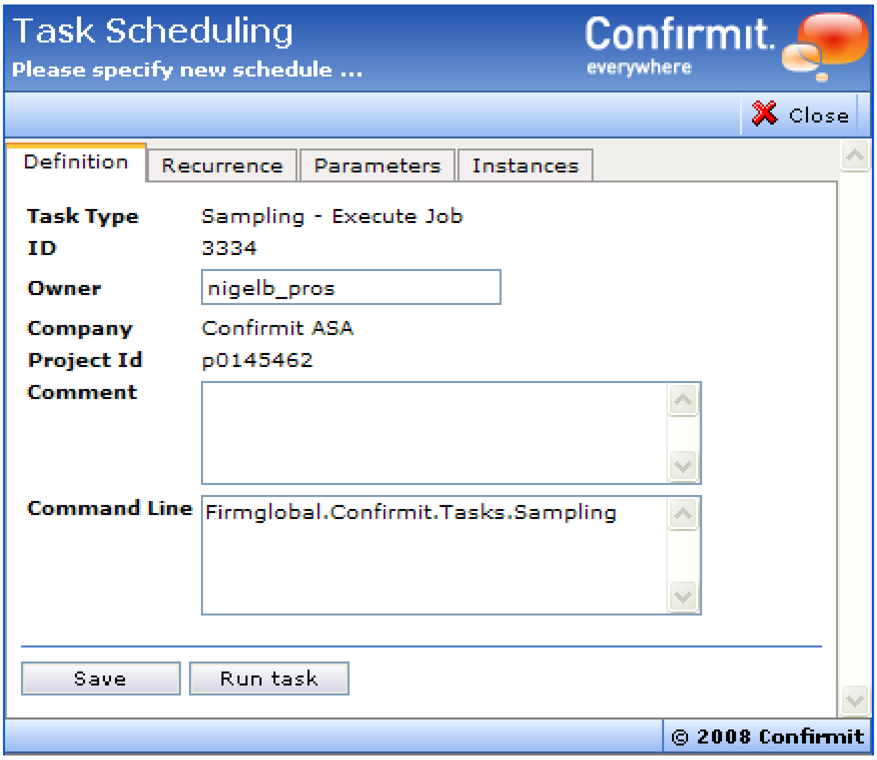


Figure 248 Example of the Task Scheduling window

This window contains the Recurrence Pattern dialog. Here you can change the recurrence settings, disable (delete) the task, or override the recurrence settings and start the task immediately.

In the Recurrence tab, click **Change** to open the dialog for access to the recurrence settings (see The Task Definition Properties Dialog on page 164 for more information).

7.6.2. The Inactive List

1. To view the Inactive job-list, go to the **Sampling Management > Scheduling** menu command, click the down-arrow beside the View field and select **Inactive**.

   The Inactive list contains all the jobs that have been run. The job status column indicates whether the job was completed or aborted by the system.

   Note that a job may be aborted by the system for many reasons, for example the system may not be able to find the required number of panelists, or there may be a problem with the date or exclusion setup.

2. To view the report for a completed job, click the link in the Log Entry column for that job. The Task Log window opens.

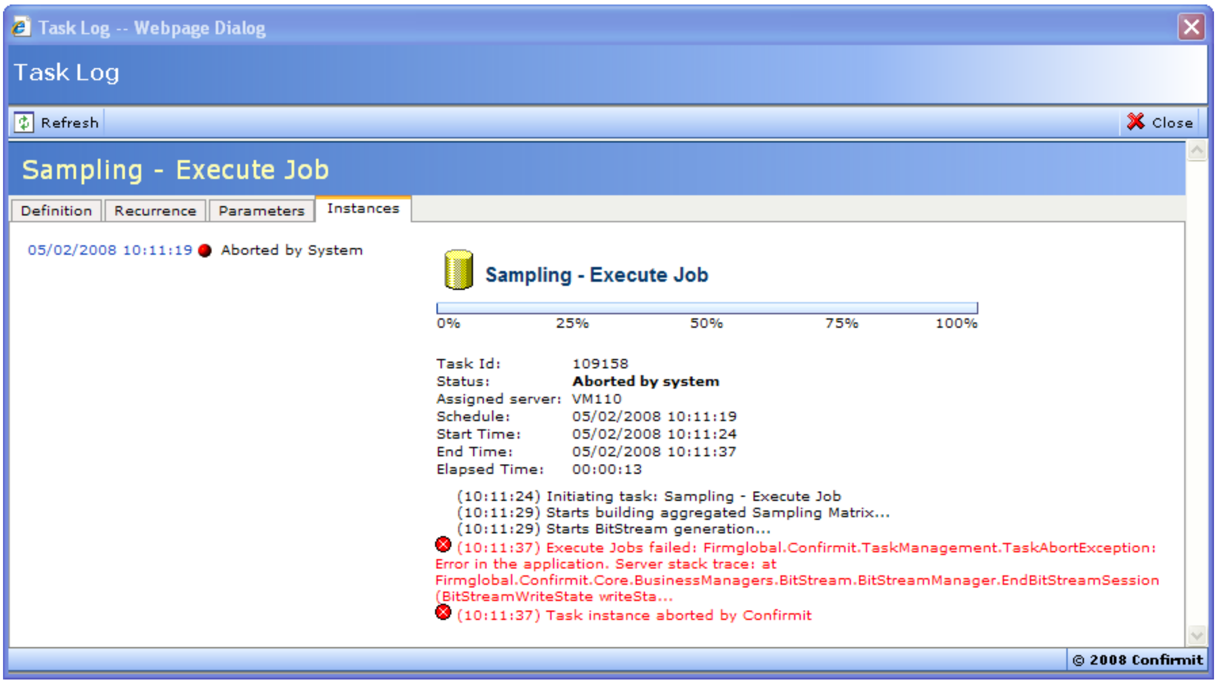


Figure 249 Example of the Task Log for an aborted job

- The Definition tab holds the details of the job.
- If the job has been set up to recur then the Recurrence tab provides details of when etc. Click **Change** to change the recurrence settings (see How to Set Up Recurring Tasks on page 154 for more information).
- The Parameters tab shows the job's parameters.
- The Instances tab shows the date and time of the task, and how the run progressed (see the figure above). If this is a recurring job then there may be more than one run listed in this tab. In this case click on the blue date/time link for a particular run to view the progress list for that run.

Click the **Close** button located in the upper right corner of the window to close the window and return to the Scheduling list.

7.6.3. Procedures in the Scheduling Window

7.6.3.1. How to Abort Execution of a Sampling Job

There may be a time when you need to delete a sampling job from the schedule before it has been performed. Proceed as follows:

1. Go to the **Sample Management > Scheduling** menu command.

   The Scheduling window opens (see Scheduling on page 195 for more information).
2. In the Sampling Jobs list, find the job you wish to delete and click in its checkbox to select it.
3. Click **Remove**.

   The job is deleted from the list and will not be performed.

7.6.3.2. How to Change the Job Schedule Settings

After a job has been scheduled, you may need to change the settings.

1. Go to the **Sample Management > Scheduling** menu command.

   The Scheduling window opens (see Scheduling on page 195 for more information). The jobs listed in the Active list are those that are scheduled but that have not yet been executed.
2. Click on the link to the job that you wish to change.

The Task Scheduling window opens with the Recurrence Pattern dialog (see The Sampling Jobs List on page 195 for more information).

3. Click **Change**.

   The Recurrence tab opens enabling you to edit the settings.

4. Make the required changes.

5. Click **Save**.

   The Recurrence Pattern dialog is updated to show the new settings.

7.7. Concurrent Sampling

Note: The Concurrent Sampling functionality is an add-on and is subject to payment.

7.7.1. Background

In a normal sampling task, each sample is calculated from the available resources (the panelists that have not yet been selected for other jobs) with no awareness of the requirements of any following samples. This process is called Sequential Sampling, and the result is that the first samples extracted have first rights to the resources. As later samples are extracted, the pool of resources in certain categories may be exhausted leaving none available. The sample selection operator would normally attempt to look ahead at the sample jobs in the queue, and make manual adjustments to the earlier job specifications so that some scarce respondents will be available for later jobs. This process is dependent on the skill of the operator, but is also rather crude and imprecise. Furthermore, comparison of such jobs, presumably of equal priority, is very difficult.

The Concurrent Sampling functionality processes multiple sample selection jobs simultaneously. Each job will have a different selection criteria and structure, with different target sample counts, based on output or returns, and will make the trade-offs when allocating scarce panel resources. The result in this case will be that scarce resources are allocated fairly across multiple sample jobs.

7.7.2. The Concurrent Sampling Window

Go to the **Sample Management > Concurrent Sampling** menu command. The Concurrent Sampling window opens.

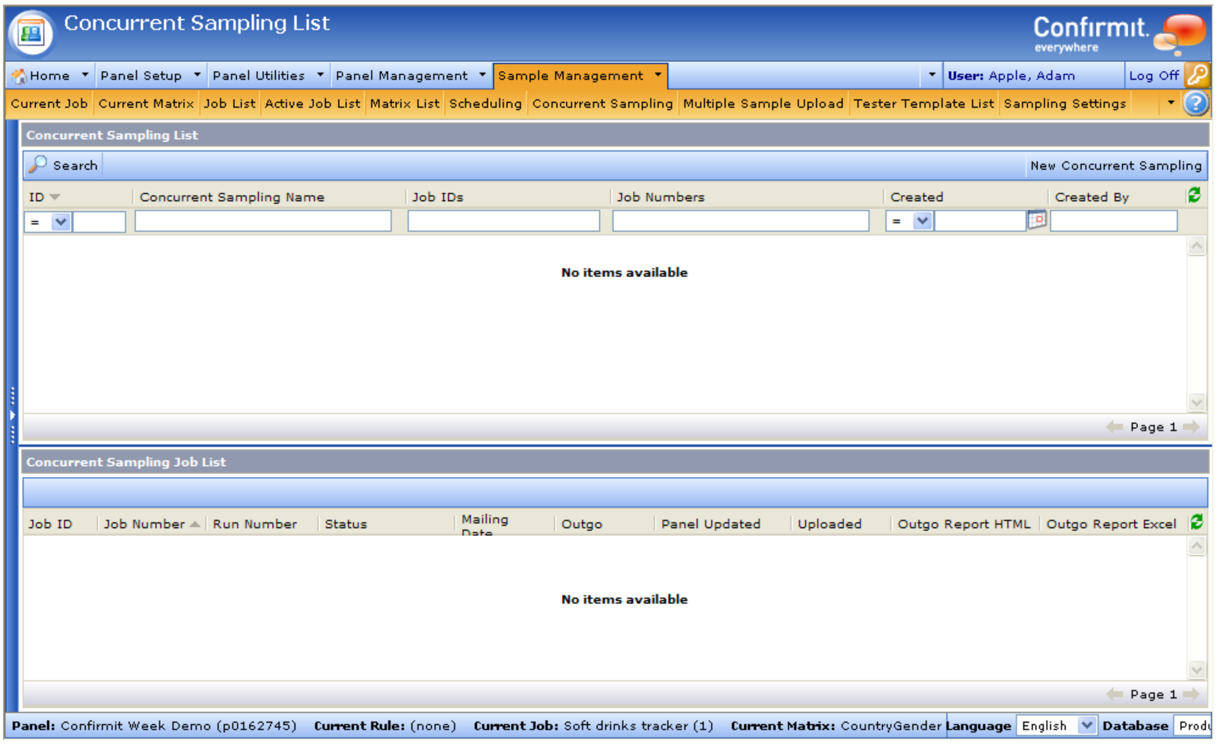


Figure 250 Example of the Concurrent Sampling window

The window contains two main areas:

- **Concurrent Sampling List –** lists the concurrent sampling jobs that are currently available to be run.
- **Concurrent Sampling Job List –** the jobs that have been selected to be run in the concurrent sampling task.

7.7.3. How to Run a Concurrent Sampling Job

1. Go to the **Sample Management > Concurrent Sampling** menu command.

   The Concurrent Sampling window opens.

2. Click the **New Concurrent Sampling** button towards the right end of the toolbar.

   The New Concurrent Sampling window opens.

3. In the Available Jobs list, find the jobs you wish to run concurrently and select them by clicking in the boxes at the beginning of the rows.

   If the list is extensive, you can search using the Job Number, the Description or the Mailing Date.

4. Click **Add** to move the selected jobs to the Selected Jobs list.
5. In the Execute Job Properties column, select and/or set the required options.
6. Click **Execute**.
7. In the event you have selected Schedule for later execution in the Execute Job Properties area, a dialog will open to allow you to set up the recurrence pattern. Make the appropriate settings and save.

   The job will run as specified. On completion, the samples can be handled as “normal”.

7.7.3.1. The Execute Job Properties

- **Pull to Expected Returns –** each panelist can be given a grade for the probability that he/she will reply to the questionnaire. This variable must be created as a system field in the panel survey, and must be an open numeric object with a value between 0 and 1. The value of the variable will normally be calculated for the individual panelists using a rule, and will be based on the responses to previous surveys. The value is used during the sampling process to calculate how many panelists must be selected for a sample to ensure that the required number of responses are received. When the Pull to Expected Returns property is selected, the Expected Return Variable will be used for each panelist when creating the sub samples.

Note: The Expected Return Variable must be included in the Data Source for the selected jobs. To enable this, you must specify an Expected Return Variable on the Sampling Settings page (see The General Tab on page 203 for more information).

- **Update Panel** – ensure this box is checked if you wish to create a sample and update the database. This action will reserve the selected panelists for the job, ensuring they cannot be used for other jobs during the exclusion periods.

  Click in the box to deselect it if you wish to perform a “dry-run” of the sample selection process. Forsta Plus will then apply all the expressions and exclusions, will check the system setup, and will present a report with all the appropriate information, but no changes will be made in the database and the panelists will not be reserved. Use this to test the job setup to ensure you get the required panel. You can perform as many dry-runs as you wish.

Note: If you execute the job with the Update Panel option selected, you can remove the panelist reservations from the database afterwards. To do this, click the Remove Job from Panel button that appears in the tab’s toolbar.

- **Generate Sample File** – ensure this box is checked if you require the sample file (the list of panelists reserved for the job) to be created.

Note: If you select to create the sample file but not to update the panel database, then Forsta Plus will have no record that the selected panelists have been involved with this job. These same panelists may then be included in later jobs, and will not be excluded automatically by date and/or category.

- **Comments** – type any comments into the free-text data field.
- **Start Time** – click the down arrow to open a drop-down list of the options available:

- **ASAP** – start the job as soon as possible. The job will be queued behind any other jobs awaiting processing in the database, and will be run as soon as the processor is available.
- **Schedule for later execution** – select this option if you want to run the job execution procedure at a later time. If this option is selected, when you click **OK**, a dialog opens in which you can set the required time and date for the procedure to be run, and whether you want the job to be repeated (see How to Set Up Recurring Tasks on page 154 for more information).

7.8. Multiple Sample Upload

This menu command enables you to upload several jobs simultaneously. Note that the jobs must have been executed.

1. Go to the **Sample Management > Multiple Sample Upload** menu command.

   The Multiple Sample Upload window opens as shown in the example below.

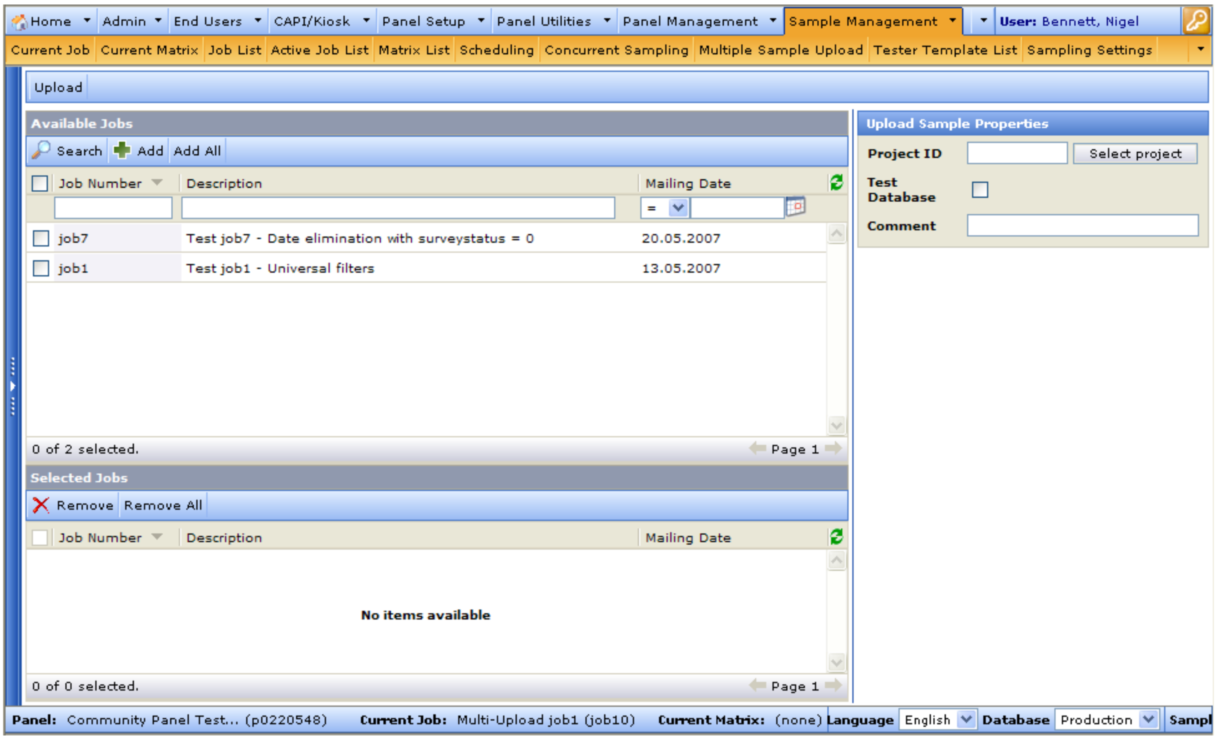


Figure 251 Example of the Multiple Sample Upload window

   Here you must specify the project the jobs are to be uploaded to.

2. In the Upload Sample Properties column, click **Select Project**.

   The Available Survey Project window opens, listing the projects currently available.

3. Select the project you wish to upload the jobs to, and click **OK**.

   The Available Survey Project window closes and the project number is added to the Project ID field.

4. In the Available Jobs list, select the jobs you wish to upload and click **Add**.

   The selected jobs are grayed out in the upper list and are moved to the Selected Jobs list below.

5. Click **Upload** towards the left end of the Multiple Sample Upload window toolbar.

   The task window appears as in the example below. Click the Task ID links to see the details pages for the tasks.

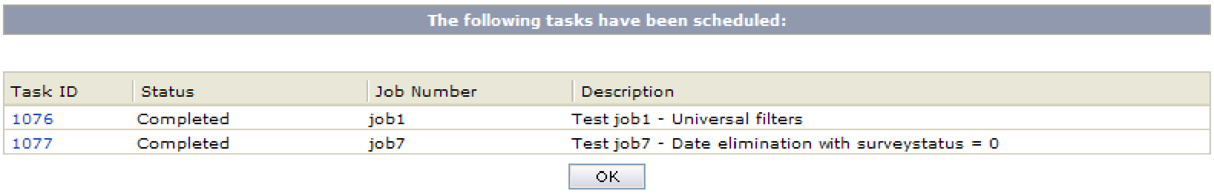


Figure 252 Example of the task list

6. On completion, click **OK**.

   The task list closes and you are returned to the Multiple Sample Upload window.

7.9. Tester Template List

Go to the **Sample management > Tester Template List** menu command. This window enables you to add rows to the respondent database that you can then populate with "dummy" respondent information such that you can test the survey and the system setup before you send it out to the actual respondents.

A Template in this instance is a set of dummy respondent information that you can create and store such that it is available to be added to the respondent database when required.

You can set up any number of such templates for a panel, and add different respondent information to each such that you can check different parts of the survey logic.

In the event the list is extensive, Forsta Plus provides a search facility to assist you with finding the template you wish to use. This functions in the same way as the other search facilities in Forsta Plus.

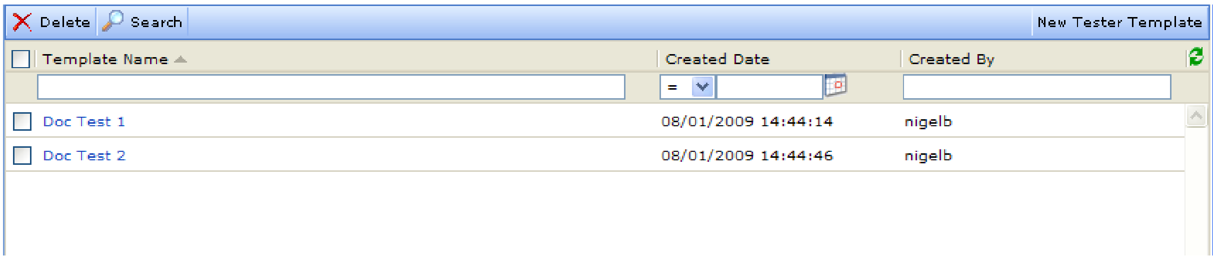


Figure 253 Example of the Tester Templates window

7.9.1. How to Create a New Tester Template

1. Click **New Tester Template** in the upper right corner of the window.

   The New tester Template dialog box opens.

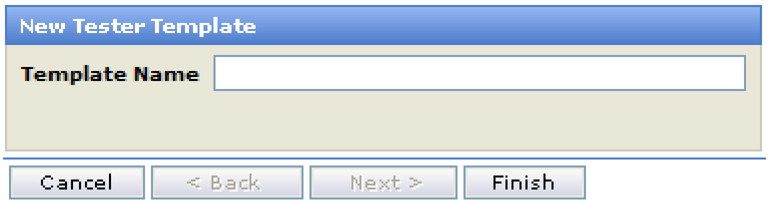


Figure 254 The New Tester Template dialog box

2. Type in a name for the template
3. Click **Finish**.

   The template is created and the Tester Template page opens.

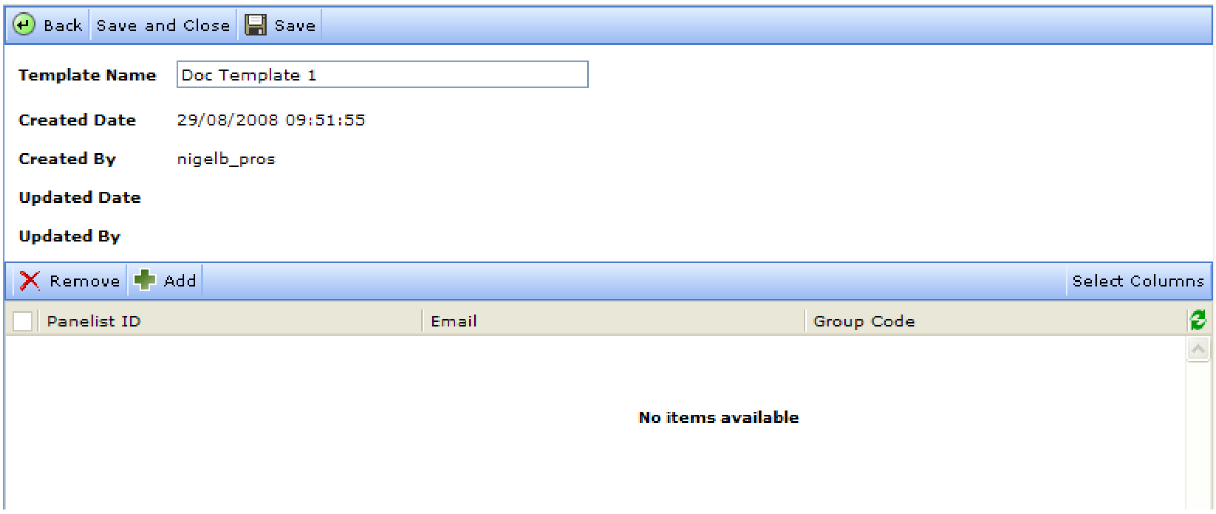


Figure 255 Creating a new tester template

You now need to add the dummy respondents to the template.

4. In the lower part of the page, click **Add**.

   A row is added to the table.

5. Type a panelist ID into the first field, a valid email address into the Email field, and type a group code into the other field.

   This Group Code corresponds to the codes specified in the sub-sample.

6. Repeat steps 4 and 5 until you have the required number of “Test respondents” in the template.

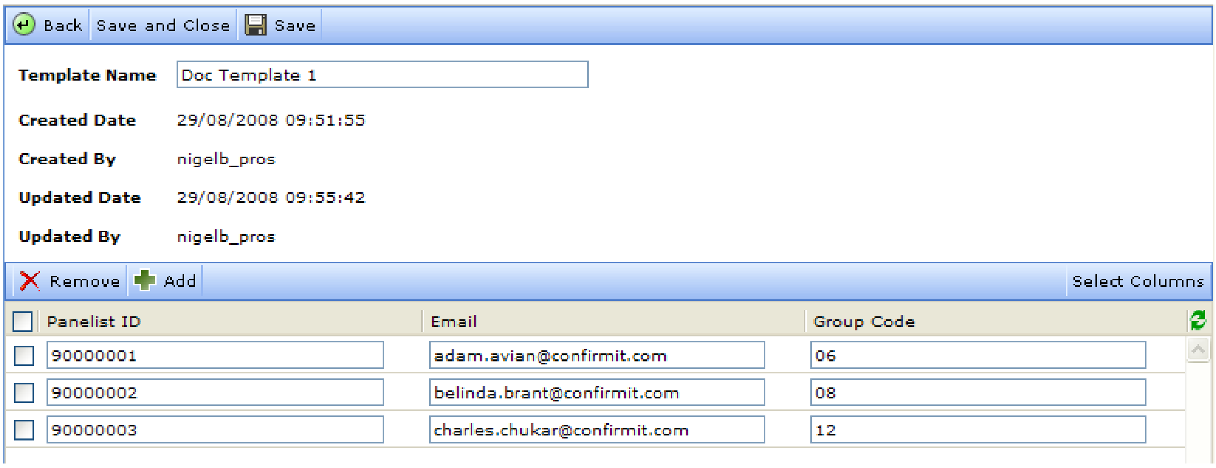


Figure 256 Example of a tester template

7. Click **Save and Close** or **Save** to save the changes, then click **Back** to return to the Tester Templates list.

You can now add the dummy “test respondents” created in the template to the bottom of the respondent database. The respondent data fields for these new rows in the database are then populated by data copied from the same number of rows at the top of the database. In this way, the test respondents will automatically fulfill the category, date and other requirements such that they are accepted as “members” of the sample in the database (see How to Add Test Panelists to the Database on page 164 for more information).

7.10. Sampling Settings

The Sampling Settings page allows you to set default values and rules for the panel. These settings apply only to the panel currently in use.

Go to the **Sample Management > Sampling Settings** menu command.

The Sampling Settings page opens at the General tab.

7.10.1. The General Tab

Use this page to set the default properties for the panel.

Note: A number of the features on this tab can be shown or hidden as required for specific projects. To enable or disable features, go to the Panel Management > Panel Settings menu item Features tab (see The Panel Settings Features Tab on page 120 for more information).

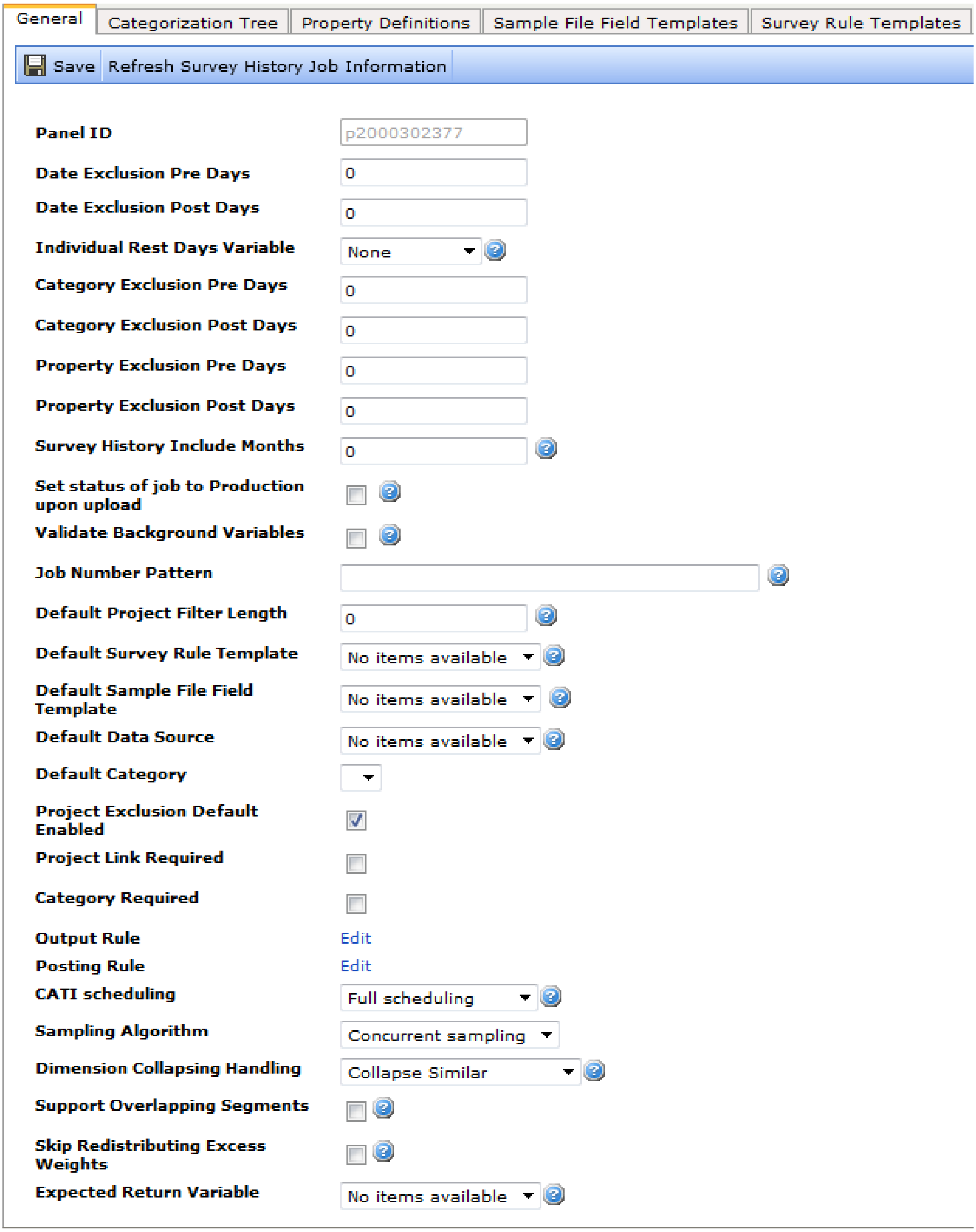


Figure 257 The Sampling Settings page General tab

This page contains the following properties and information:

- **Panel ID –** the unique identification number for the panel. This is allocated automatically by Forsta Plus when the panel is first created and cannot be changed.
- **Date Exclusion Pre Days –** this is the default value for the “number of days before mailing date” in the date exclusion function (see How to Set the Date Exclusion Function on page 134 for more information).

- **Date Exclusion Post Days –** this is the default value for the “number of days after mailing date” in the date exclusion function (see How to Set the Date Exclusion Function on page 134 for more information).
- **Individual Rest Days Variable -** a numeric variable can be included in for example a registration survey, which specifies a required number of "rest days" for the individual panelists. The panelists will then be excluded from any samples for the number of days specified. When you wish to make use of this property, use this field to select the variable that contains the panelists' individual rest days. With this property set, the Individual Rest Days for a panelist will by default override the global Date Exclusion rule (see The Auto Job Exclusion Tab on page 129 for more information) and this property can itself be overridden by other inclusions or exclusions such as category, property and manual. If no value is specified for a particular panelist, then the global rule will be used for that panelist. The variable must be an open numeric.
- **Category Exclusion Pre Days –** this is the default value for the “number of days before mailing date” in the Category Exclusion function (see How to Set the Category Exclusion Function on page 133 for more information).
- **Category Exclusion Post Days –** this is the default value for the “number of days after mailing date” in the Category Exclusion function (see How to Set the Category Exclusion Function on page 133 for more information).
- **Property Exclusion Pre Days** - this is the default value for the “number of days before mailing date” for excluding properties(see The Property Definitions Tab on page **Error! Bookmark not defined.** for more information).
- **Property Exclusion Post Days** - this is the default value for the “number of days after mailing date” for excluding properties (see The Property Definitions Tab on page **Error! Bookmark not defined.** for more information).
- **Survey History Include Months –** the number of months that items in the survey history will be included in the BitStream files used by the sampling process. Type in the desired value.
- **Logging Enabled** – enables or disables extra logging of the sampling balancing algorithm’s behavior. Note that this property is only available if the System Configuration setting SamplingLoggingEnabled is enabled on site.
- **Set Status of Job to Production… -** a job will not normally be given the Production status before first real panelist has been invited by email. Check this box to set a job status to Production once the sample has been uploaded.
- **Validate Background Variables –** check to enable validation that the fields in the sampling file exist in the survey to which the sample file is to be uploaded.
- **Job Number Pattern –** a regular expression used to determine the legal syntax of a job number.
- **Default Project Filter Length –** specifies the length of search-criteria when finding a survey to which a sample is about to be uploaded. This property should be used if the survey names correspond to Job Numbers.
- **Default Survey Rule Template –** the Survey Rule Template that is to be used if no other Survey Rule Template is specified based on custom properties (see The Survey Rule Templates Tab on page 210 for more information).
- **Default Sample File Field Template –** the Sample File Field Template to be used if no other Sample File Field Template is specified based on custom properties (see The Sample File Field Templates Tab on page 209 for more information).
- **Default Data Source –** for each sampling job that is created, the user must specify a data source (a BitStream variant created via a rule) that is used as the source for sampling. If you have multiple data sources, it is possible to specify which data source is to be set as the default when creating a new job.
- **Project Exclusion Default Enabled –** this also applies to new jobs. When enabled, the new exclusion “Project Exclusion” is by default checked for new jobs. When enabled, the job must be linked to a project. This property is related to the Project Link Required property below.
- **Project Link Required –** when checked, all new (and old) jobs must be linked to projects before they can be executed.
- **Category Required –** when enabled, the user must select one or more categories on the Job Information page before the job can be executed.
- **Output Rule –** use this to set the formatting rules for a sample file. Here you can specify the format for date fields, numeric and Boolean values, and create aliases for the sample file headers. Click **Edit** to open the Rule Editor page (see Current Rule on page 73 for more information).

- **Posting Rule –** you can run a panel rule for a specific sample file. For example, if you have a survey that requires specific header names for the columns in the sample database, then use this rule to change the headers as required. Click **Edit** to open the Rule Editor page(see Current Rule on page 73 for more information).
- **CATI Scheduling -** when you do a respondent upload from a file to a CATI survey you can set the CATI scheduling. This will automate the assignment and scheduling of your CATI respondents. Respondent data being loaded into a CATI-enabled survey can have one of the following scheduling modes applied:
  - **Simple scheduling –** will by default create a call without an assignment with a time to call of now. The following respondent data can adjust the call created:
    CatiInterviewerID will assign the call to the specified group/interviewer ID, a blank (or invalid) value will result in no explicit assignment being made.
    CatiCallTime will assign the date and time to call based on the respondent timezone or the local company timezone if no timezone is specified, defaulting to the company local timezone, a blank (or invalid) value will result in the time to call to be set to now. An example value could be: 2001-03-14 13:30.
    CatiExtendedStatus will assign the extended status to that value, a blank (or invalid) value will result in the extended status being set to be Fresh Sample (16). Values other than 16 will not have a call created for them.
  - **Full scheduling –** will run all respondent data through the full scheduling engine and adhere to all calling rules. This mode should be used if advanced scheduling is required at the respondent loading time.

Note: CATI Scheduling is only available for a CATI-enabled survey. Refer to the Authoring User Guide for further details.

- **Sampling Algorithm** - allows you to specify the sampling algorithm to be used for single job execution. The options are Sequential Sampling and Concurrent Sampling (see Concurrent Sampling on page 198 for more information). When Concurrent Sampling is selected, the Expected Return Variable property becomes available (see below).
- **Dimension Collapsing Handling** - by default, Forsta Plus will collapse similar dimensions in the new combined matrix as this will minimize the complexity of the combined matrix. Using this property you can select to collapse only dimensions that are identical. This will maintain more complexity in the matrix, but the data in the resulting report will be easier to understand.
- **Support Overlapping Segments** - when running Concurrent Sampling, a new combined matrix will be set up to include all the dimensions in the different jobs. Similar dimensions will be collapsed according to the Dimension Collapsing Handling setting selected (see above). If Dimension Collapsing Handling is set to "Identical" and "Support Overlapping Segments" is not enabled, only the overlapping parts of the similar dimensions will be available for sampling.
- **Skip Redistributing Excess Weights -** after each sampling balancing iteration, any excess weights on segments are redistributed to segments with available panelists. This is done to increase the total outgo. However this can lead to over-sampling of some segments compared to the specified weights. Check this box to prevent redistribution and avoid the risk of over-sampling.
- **Expected Return Variable –** this property appears in the tab when Sampling Algorithm (see above) is set to Concurrent Sampling and saved. This property can only be used if one of the variables in the database contains the panelists' probability of answering a survey - in which case you select from the drop-down list the variable to be used. The variable will be a system field in the panel survey, and must be an open numeric object with a value between 0 and 1. The value of the variable will normally be calculated for the individual panelists using a rule, and will be based on the responses to previous surveys. Note that the variable cannot be zero for any of the panelists. This variable will be used when **Pull To Expected Return** is selected when running a concurrent sampling job (see The Execute Job Properties on page 199 for more information).

7.10.2. Refresh Survey History Job Information

When creating a job, you can set some custom properties in **Sample Management > Sampling Settings** (see The General Tab on page 203 for more information) and choose that these properties should be copied to the Survey History table when the job is executed (by setting the Characteristic property to Loop Support (see Question Properties on page 22 for more information)). However if the job's properties are later changed, they will only be changed on the job itself, not in the Survey History table.

The Survey History table is only updated when **Refresh Survey History Job Information** is clicked; the values/properties in the Survey History table are then synchronized with the values/properties in the job. Note however that to be able to refresh the Survey History table, a number of criteria must first be met:

- In the **Panel Setup > Designer** menu command, the **Panel Variables toolbox > Survey History** variables must be added with an ID the same as the ID of the custom property for the job.
- The Characteristic property must be set to LoopSupport for all variables that are to be copied to the Survey History table.
- The Property Definitions tab for the job must have the Survey History Support property checked (see The Property Definitions Tab on page **Error! Bookmark not defined.** for more information).

The **Refresh Survey History…** button will then be active, and when clicked will synchronize the property values in the Survey History table with the property values in the job.

7.10.3. The Categorization Tree Tab

Use this tab to create and manage a hierarchy tree for the categories used in the panel. The categories are defined by the user (company) and used to classify jobs, with each job belonging to one or more categories. You can then use these classifications when for example setting up exclusion rules for sampling (see The Job Information Tab on page **Error! Bookmark not defined.** for more information).

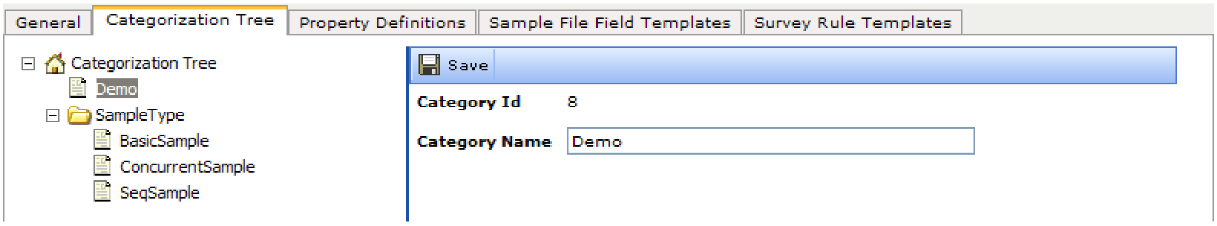


Figure 258 Example of the Categorization Tree tab

7.10.3.1. How to Add Groups and Categories to a Panel

To add a categorization or a group to the tree:

1. Go to the **Sampling Management > Sampling Settings** menu command and click the **Categorization Tree** tab.
2. Right-click on the item after which you wish to create the group or categorization, then select **Add Category** or **Add Categorization Group** from the drop-down menu as appropriate.

   The Categorization Group Name or Category Name form opens as appropriate.

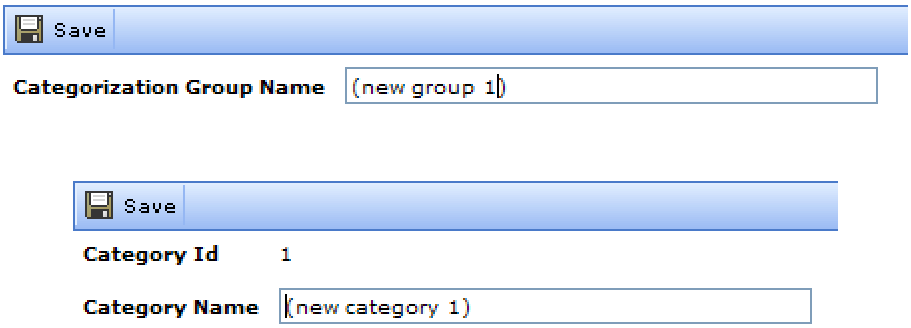


Figure 259 The Category Group and Name entry forms

3. Type the name for the new item into the Category Name field, then press **Return** or click **Save** to save the changes.

Note: Only alpha-numeric characters, underscore, parenthesis, apostrophe and space may be used in these fields.

The Group or Categorization is added to the tree.

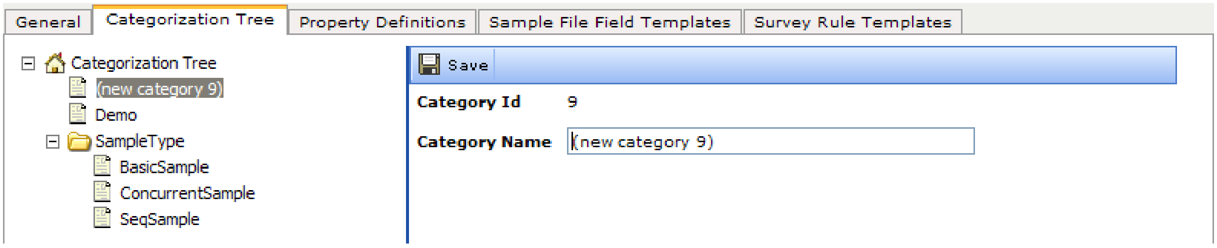


Figure 260 Example of a Categorization Tree with Groups and Categories

These categorizations will be available to you in the Category fields on the Job Information tab when creating and/or editing the current job (see The Job Information Tab on page **Error! Bookmark not defined.** for more information).

7.10.4. The Property Definitions Tab

This tab lists the existing Property Definitions, as shown in the example below.

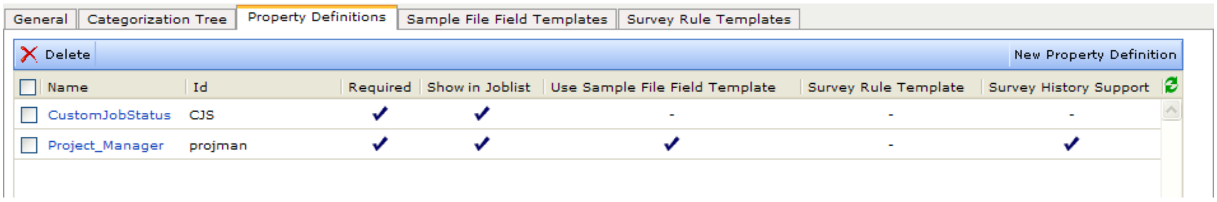


Figure 261 Example of the Property Definitions list

The tab allows you to apply your own properties to jobs. Properties can be used not only to categorize jobs, but also in for example panel rules. You can specify which of the custom properties, and how many of them, are used.

To edit an existing Definition, click on the blue **Name** link. The Properties page opens for the definition.

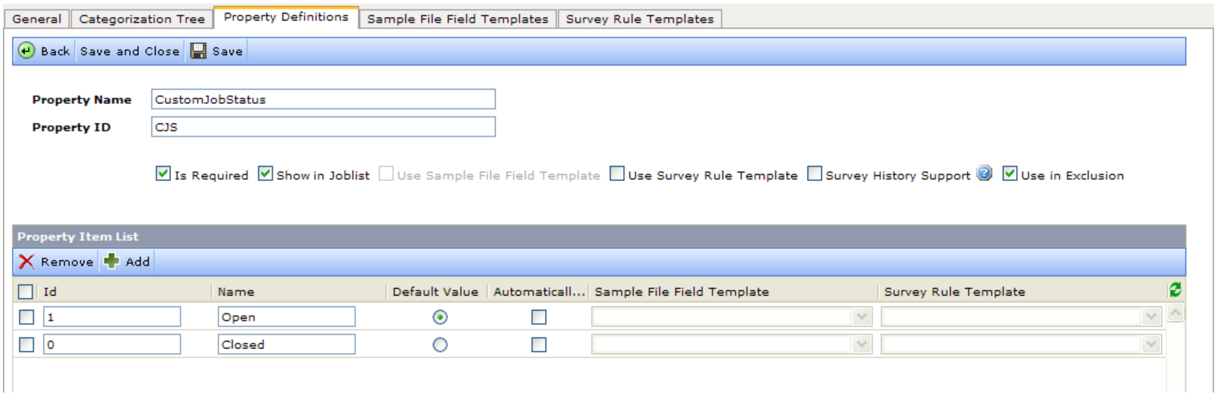


Figure 262 The Property Definitions page

Here you define new property items and specify their requirements. The selection boxes are:

- **Is Required –** check this box if a job must include this property to be valid.
- **Show in Joblist –** check this box to specify that the job is to be included in the job list.
- **Use Sample File Field Template –** in the Property Item List in the lower part of the page, select the Template to be used.
- **Use Survey Rule Template –** in the Property Item List in the lower part of the page, select the Survey Rule Template to be used.

- **Survey History Support**– allows you to add the value of the custom property to the Survey History table at the time the job is executed. This is so customized properties can be used in expressions in Panel Rules later. Note that once the job is executed and the values are added to the Survey History table, if the job's properties are later changed then particular criteria must be satisfied if the Survey History table is to be updated (see Refresh Survey History Job Information on page 206 for more information).
- **Use in Exclusion –** click to use the definition for Property Exclusion for the job (see How to Set the Property Exclusion Function on page 135 for more information).

Note: Only one Property Definition can be used for exclusion in a job. Once the Use In Exclusion box is checked for a Property Definition, the box cannot be accessed for another definition.

7.10.4.1. *How to Create a New Property Definition*

1. On the Property Definitions tab, click the **New Property Definition** button towards the right end of the toolbar.

   The New Property Definition dialog opens.

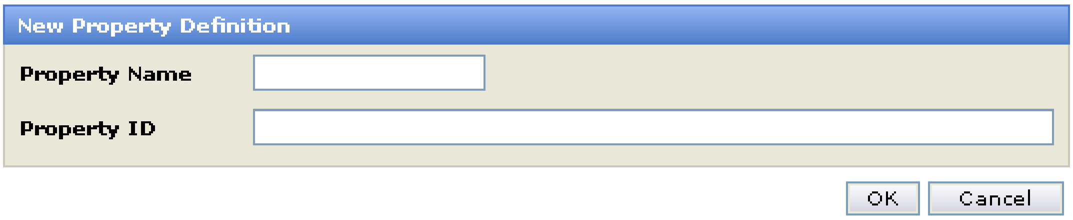


Figure 263 The New Property Definition dialog

2. Type a name and an ID for the property into the respective fields, then click **OK**.

   The Property Definitions page opens. Select the options and add Property Items as required.

3. Save the changes.

7.10.4.2. *How to Define a Property Item*

1. In the Property Item List toolbar, click the **Add** button.

   A new line is added to the list.

2. Type in an ID and a name for the new property, then select the remaining options as required (see above for definitions).
3. Save the changes.

7.10.5. The Sample File Field Templates Tab

When a job is run, the output is a text file (respondent list). The job specifies which panelists are to be used, and also which columns from the database are to be included. This tab specifies which columns are to be included as default.

Note: To specify any columns that are to be included in addition to these default columns specified here, go to the Sample Management > Current Job > Sample File Fields tab (see The Sample File Fields Tab on page Error! Bookmark not defined. **for more information).**

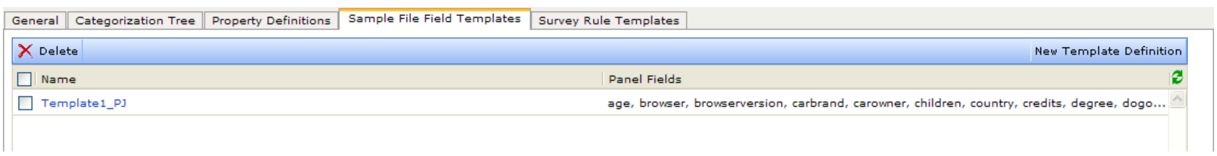


Figure 264 Example of the Sample File Field Templates tab

Click on the blue **Name** link for a template to open the editing page for that template.

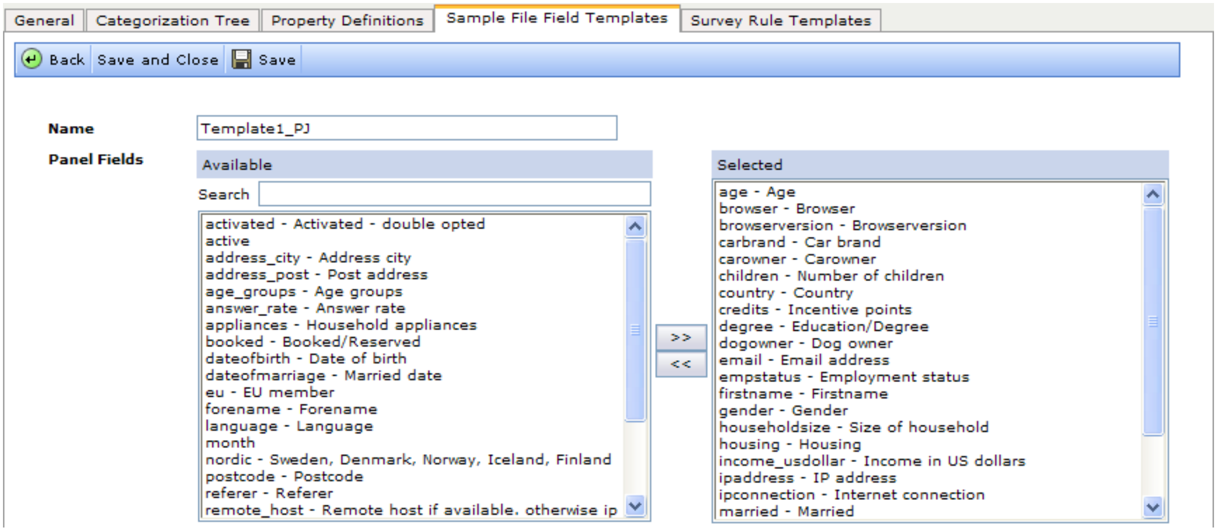


Figure 265 Example of the template editing page

The available fields are listed in the left column; any fields that are already selected for the template are listed in the right column. On completion, save the changes.

7.10.5.1. How to Create a New Template Definition

1. In the Sample File Field Templates tab, click the **New Template Definition** button towards the right end of the tab toolbar.

   The Template Editing page opens.

2. Give the new template a name.
3. In the Available column, find and select the sample file fields you wish to include in the template.
4. Click the **>>** button to move them to the Selected column.
5. Click **Save** to save the changes.

If this template is later used in a job, then the database columns selected here will automatically be included in the sample file.

7.10.6. The Survey Rule Templates Tab

Use the properties in this tab to specify how information in a survey is to update the panel, and to specify which rules are to be used in which event. Three events can be controlled by rules:

- When and how the database is updated with respect to panelists who have completed the survey.
- When and how the database is updated with respect to panelists who have not responded to the survey.
- When the survey is to be closed to respondents.

7.10.6.1. How to Create a New Survey Rule Template

1. Click the **New Survey Rule Template** button located towards the right end of the list toolbar.

   The New Survey Rule Template dialog box opens.

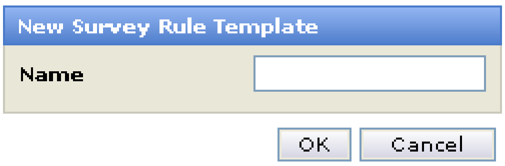


Figure 266 The New Survey Rule Template dialog box

2. Type a name for the new rule into the Name field.
3. Click **OK**.

   The Rules page opens, enabling you to edit the rules for the template.

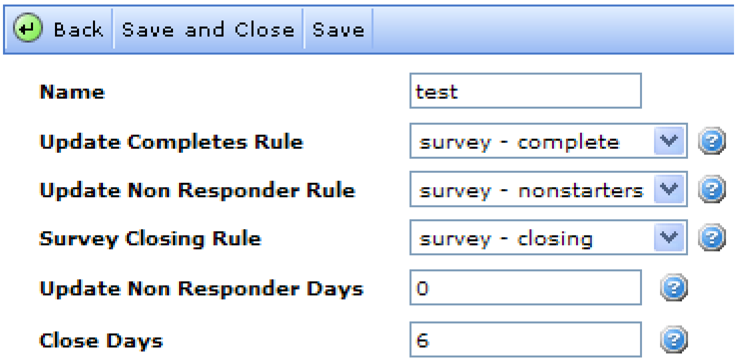


Figure 267 The Edit Rules page

The properties are as follows:

- **Name –** the name of the rule. This can be edited as required.
- **Update Completes Rule –** the rule that updates the panel database with information on the panelists who have completed the survey since the previous time this rule was run. Note that this rule will only be run when the Survey Synchronization task runs (see Survey Synchronization on page 72 for more information). The Survey Synchronization task must therefore be set up to run at suitable intervals such that the panel database is maintained appropriately.
- **Update Non Responder Rule –** not all panelists selected for a survey will always wish or be able to respond to the survey invitation. This rule is intended to be used to free up panelists who have not responded to the survey within a set time, so they can be used in new surveys. This rule is usually run once between the start and closing dates of a survey, on a date specified by the Update Non Responder Days setting below. Note that this rule will only be run when the Survey Synchronization task runs (see Survey Synchronization on page 72 for more information). The Survey Synchronization task will therefore need to be set up such that this rule is run at the required time.
- **Survey Closing Rule –** this rule is run when a survey is to be closed (when the survey is completed). Note that this rule will only be run when the Survey Synchronization task runs (see Survey Synchronization on page 72 for more information). The Survey Synchronization task will therefore need to be set up such that this rule is run at the required time. Note also that this rule has the same effect as going manually to the survey's **Project Management > Overview > Panel Status** tab and selecting **Closed**.
- **Update Non Responder Days –** the number of days after the start of a survey that the Update Non Responder rule is to be run (see also Update Non Responder Rule above).
- **Close Days –** the number of days after the survey is first made available to a sample that the survey is closed – the life of the survey.

4. Select the rules and type the required values into the fields as appropriate, then click **Save** or **Save and Close** to input the settings.

8. Reportal Reports

The Reportal Reports menu command allows you to create new reports based on the panel, and view and edit any reports that have previously been created for this panel.

Note: The Reporting functionality is a Forsta add-on. If you do not have access to this functionality, contact your Forsta account manager for more information.

8.1. Report List

Go to the **Reporting > Reportal Reports** menu command to open a list of the reports that have been created for this panel. From this page you can also create new reports.

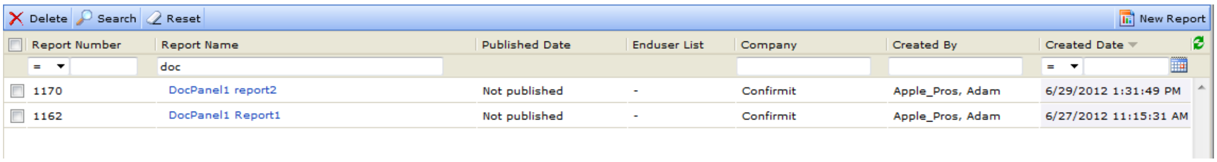


Figure 268 Example of the Report List page

In the event the list is extensive, use the search functionality to find the report(s) you are looking for.

- Click on a **Report Name** link to open the report in Reportal, at the Report Summary page. Refer to the Reportal User Guide for further details.
- **Delete** - select a report by clicking in the appropriate box at the left side of the list, then click **Delete** to delete the report.
- **Search** - if the report list is extensive, add search criteria to the various fields above the list then click **Search** or the green search button to the right end of the header row to reduce the number of items in the list.
- **Reset** - clears any search criteria that you may have added, and resets the list such that it contains all the reports available for this panel.
- **New Report** - click to create a new report based on the panel (see How to Create a New Report on page 212 for more information).

8.2. How to Create a New Report

The report creation functionality uses a pre-defined wizard to create the reports - refer to the Reportal User Guide for further details on the wizard.

1. When in the Report List page, click the **New Report** button, located at the right end of the Report List page's toolbar.

   The Create Report Using Wizard overlay opens.

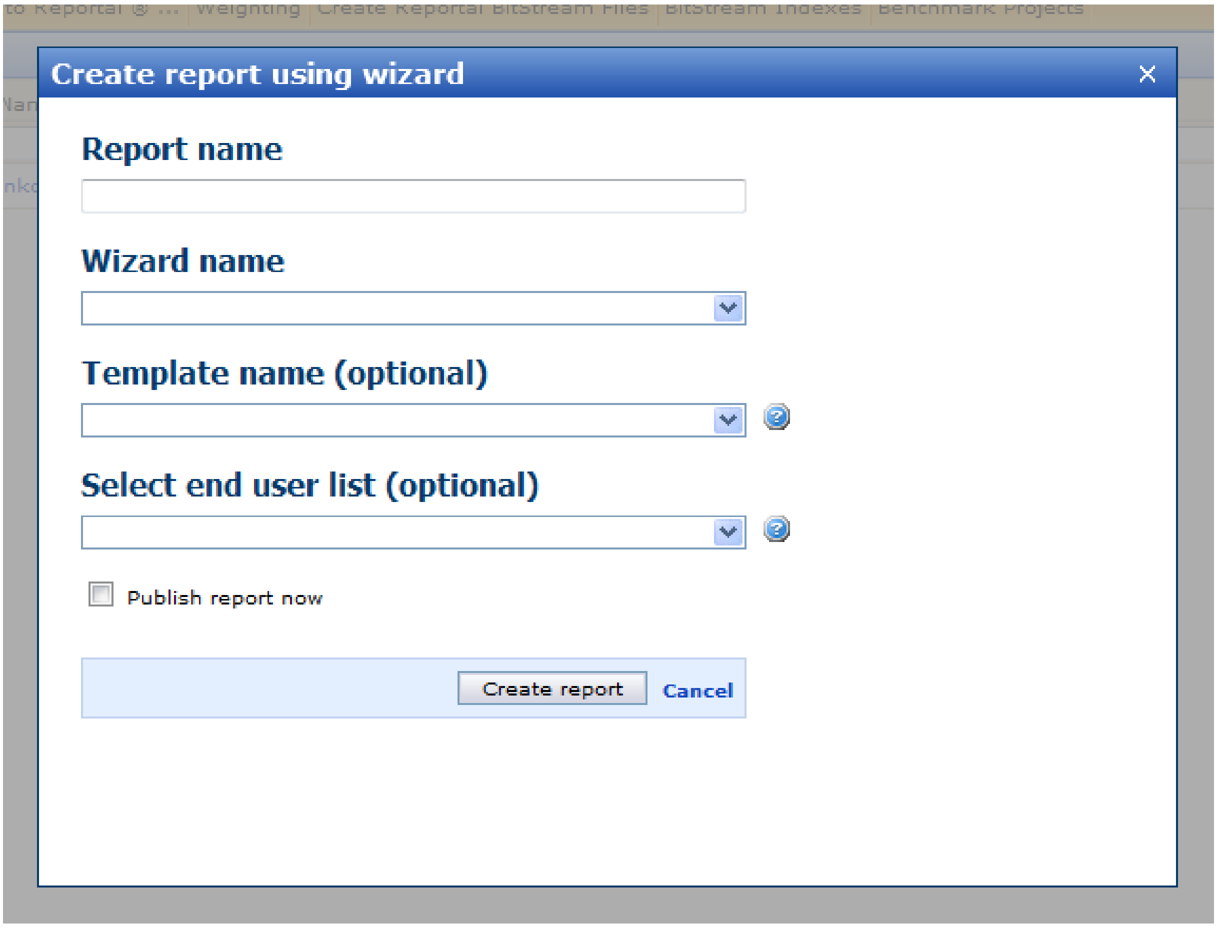


Figure 269 The Create Report Using Wizard overlay

2. Type a name for your new report into the Report Name field.
3. Click the down-arrow next to the Wizard Name field to open a drop-down list of the wizards available to you, and select the wizard you wish to use.
4. Select a template and/or an end-user list as required.
5. Select the Publish Report Now check-box if you wish to publish the new report immediately.
6. Click **Create Report**.

   A task progress page opens. On completion click **Close** to close the overlay and return to the Report List.

Full details on creating, editing and publishing reports are given in the Reportal User Guide.

9. The Panel App

The Forsta Panel App is an application that allows organizations running customer or Market Research panels to offer surveys to their panelists via mobile devices. Panelists can use this app to register for panels, manage their profile, pause and resume surveys during completion, and track accrued points for survey completion. The app can also receive push notifications about new or uncompleted surveys from the Forsta panel software (see Push Notifications on page 215 for more information).

The Panel App functionality is available for Standard and Professional Panels (not Basic Panel) at no extra charge. However this version cannot be customized. For an additional charge you can customize and brand your Panel App to ensure consistency for panelists or customers regardless of how they access your surveys. The customization includes branding of the app icon, names and labels within the app, customized log-in screens and customized survey lists. Contact your Forsta representative for details.

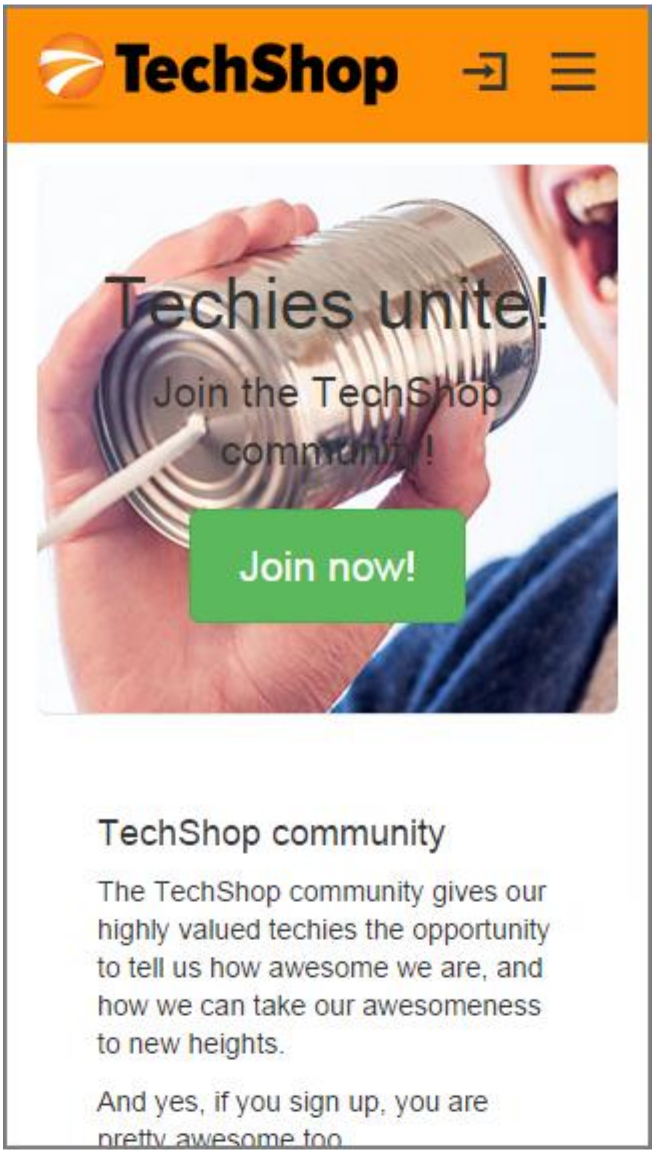


Figure 270 Example of the Panel App in use

To use the Forsta Panel App, the respondent must download the app from the Apple App Store or Google Play. The app is fully integrated with Forsta Professional and Standard Panels, so you as the designer use your existing panel designer software to create the survey. You will however need a separate, mobile-optimized portal layout. Refer to the separate Professional Authoring User Guide for further details on setting up surveys and portals.

Important
Use of Forsta Apps may include the use of third party components ("TPC"s), including but not limited to the GoogleTM Firebase range of products. The continued operation of certain features of Forsta Apps may depend on the continued proper operation of those TPCs. Forsta explicitly disclaims any warranty for or on behalf of TPCs. Certain device information, such as but not limited to operating system and model, may be forwarded to the provider of the TPCs for ensuring proper and efficient wording of the App and in accordance with the TPC's terms and conditions. For a full list of TPCs for your specific App, please contact privacy@forsta.com.

9.1. Push Notifications

Use Push Notifications to alert your "mobile panelists" that they have new surveys waiting for them. The panelist then simply taps the message to participate in the survey.

Push notifications are not dependent on respondents checking their email, and they are more reliable than SMS. Push registration is updated automatically every time the respondent uses the Panel App, so if the respondent changes their mobile number the information will be updated the next time they log in.

The push notification system uses the same system as for email invitations - when the system is set up correctly the Push Notification check-box becomes available.

To send a push notification:

1. In the survey that you will be sending to your panelists, create an email in the Invitation and reminder emails folder and set this up as the Push Notification message.
2. In the panel, go to the **Sample Management > Job List** menu item.

   The list of available jobs is presented.
3. Select the sampling job you wish to use.
4. In the Sampling Job page, go to the Execution tab and click **Execute Job**.
5. In the Execute Job Properties dialog, check the Upload Sample box then click **Next**.

   The Upload Sample Properties page opens. Here you can select to send emails and/or push messages.

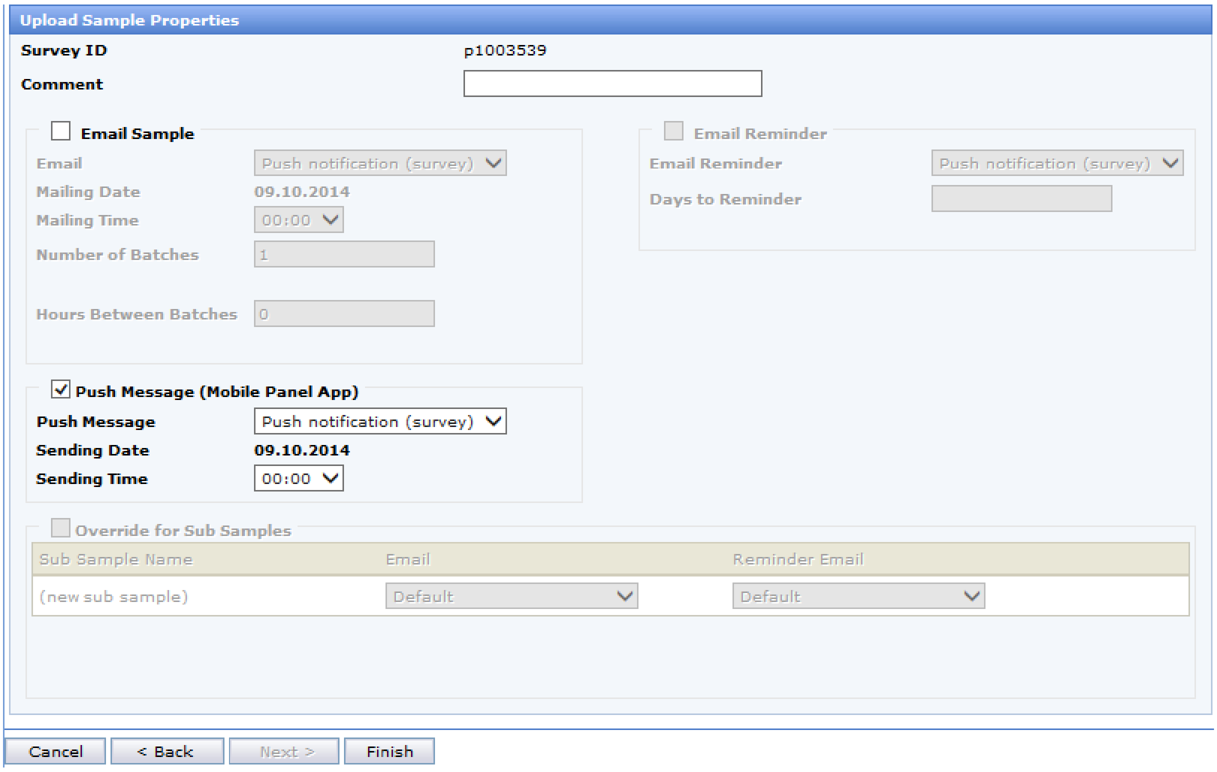


Figure 271 Setting up to send the Push Notification

6. The Push Message drop-down will list the emails you have available in the survey. Prior to this step in the process you should have set up one of the emails as the push notification - select that email. Refer to the separate Professional Authoring User Guide for further details on setting up the email.

   If the desired languages are properly configured as part of the panel user database and the email template selected for the push is correctly set up for multiple languages, then the right language will be used in the push message.

Note: Remember that the selected email will be presented to the respondent on his/her mobile display, so space will be restricted. The email subject should not exceed 30 characters and the email body should not exceed 120 characters, including spaces.

7. Select the time you wish to send the notification, then click **Finish**.

9.2. For the Respondent

To use the Forsta Panel App, the respondent must first download the app from the Apple App Store or Google Play. After the respondent has installed the app on their mobile, they must run it. The first time it is run, the respondent must register and create a password. After that, when the respondent receives a notification that they have a survey waiting for them they merely have to log in.

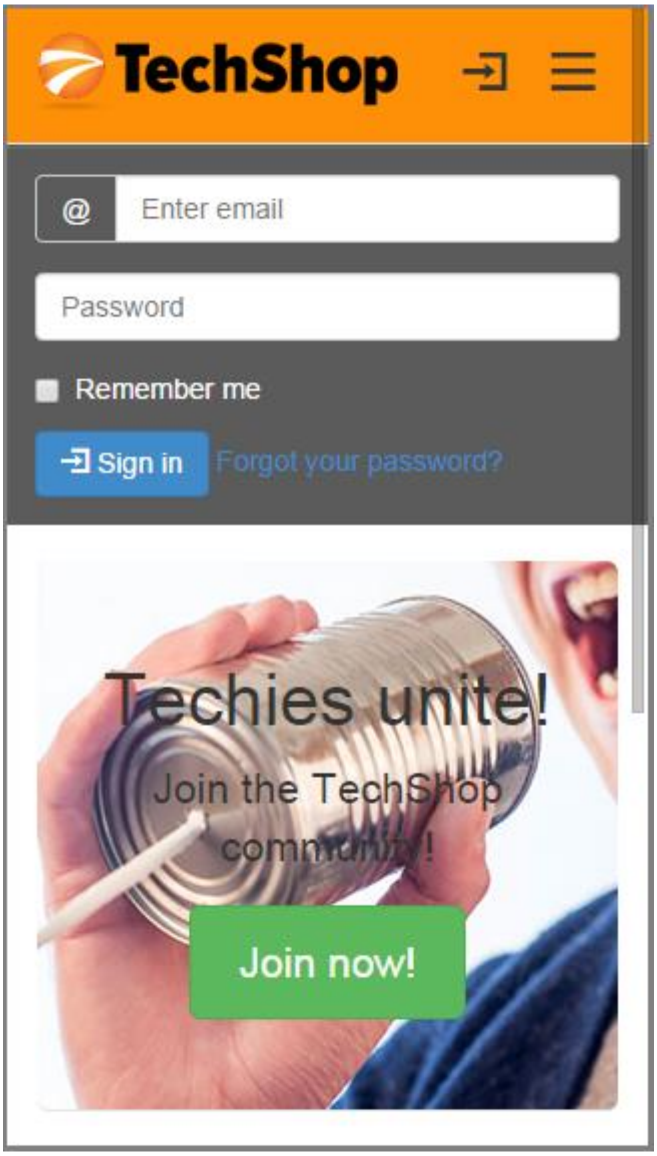


Figure 272 Example of a respondent login page

Any surveys allocated to the respondent will then be listed on the mobile display and the respondent just touches a survey in the list to open it.

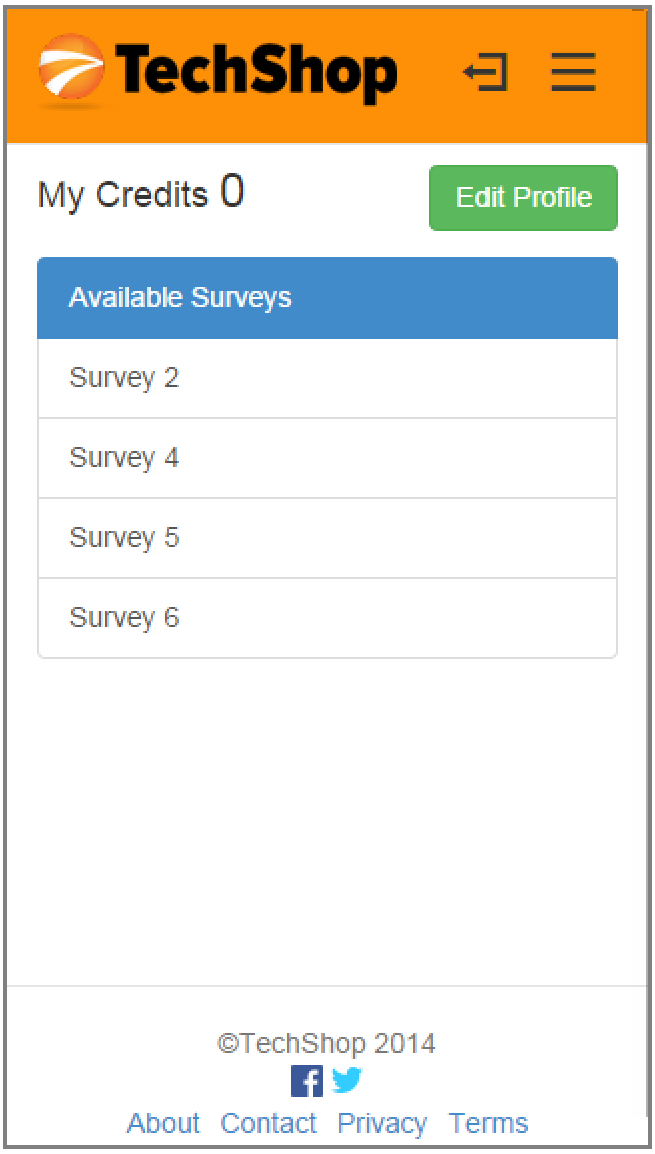


Figure 273 Example of a survey list

The layouts of the screen, the login page, the menu and the edit profile page can all be customized.

9.3. Location Trigger History Tracking and Storage

The Forsta Panel App can perform location-based survey triggering. A project manager can associate beacon identifiers and/or geolocation coordinates to a Forsta Plus survey and sample panelists for this survey. If a panelist is using the Panel App, the app will request the necessary permission to access Bluetooth and/or geolocation services on the device to facilitate triggering. One of the advanced features of this product is it is possible to fully customize what behavior is desired when the panelist enters and exits specific location/beacon boundaries.

For example, it is possible to perform path-to-purchase studies where the project manager wishes to present a survey to panelists who visit a particular sales outlet but only if they have visited a competitor within the last x hours. The app is able to do this as it stores the history information for every trigger event that has occurred on that device in the last 30 days.

Note: This is not considered “bread-crumbing” as the app does not “track” the user but rather the trigger events relate to specific locations that the project manager has defined to trigger.

Important
To avoid misunderstandings and obtain consent, Forsta recommends that you inform your panelists that the Panel App will collect some location data from his/her mobile device. Forsta further recommends that you specify which data will be collected, for what it will be used, and with whom it will be shared.

10. Changes Made to the Survey

When a panel is attached to a survey, several changes are made to that survey so it can function correctly alongside the panel. This chapter describes those changes, and the additional functionality that becomes available within surveys run by companies with the Professional Panels functionality.

Important
Surveys using batch statusing must include three “background” variables, named 'JobNumber' 'RunNumber' and 'PanelistId'. These are open-text variables with a field width of 255 characters. They must be added as background variables in the survey tree, and they must be included in the fields uploaded in the sample/job. JobNumber should be an open question node with a suitable field width set, while RunNumber and PanelistId must be numerical open questions with a suitable number of digits.

Note: The changes and functionality described in this chapter will only occur or be available to companies with access to the Professional Panels functionality.

10.1. How to Attach a Panel to the Survey

If your company is using the Professional Panels functionality, then before you launch a survey you will need to tell it which panel you wish it to use.

Note: This selection must be made before you launch the survey prior to sending it to your respondents.

1. Within the survey, go to the **Project Management > Overview** menu command.

   The Project Overview page opens at the General tab. The Panel selection field is located towards the bottom of the page.

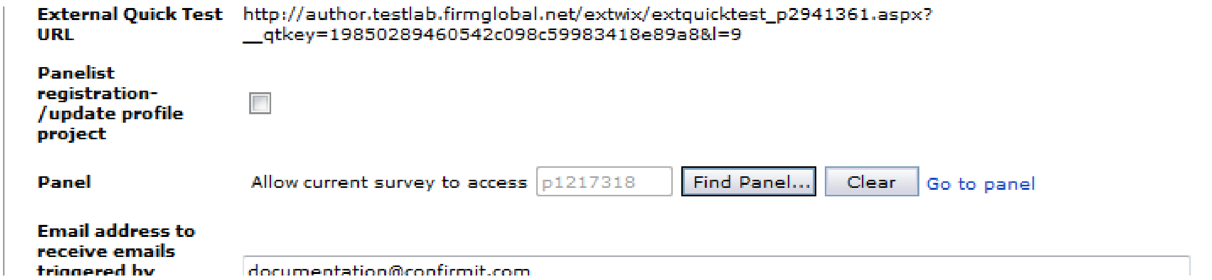


Figure 274 The Panel selection field

2. Type the Panel ID into the field, or
3. Click the **Find Panel** button.

   The Find Professional Panel window opens, with a list of the panels available to you.

4. Click on the appropriate radio button to select the required panel from the list.
5. Click **OK**.

   The window closes and the Panel ID is added to the field.

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

   Now, when you launch the survey, the selected panel will be attached to the survey.

Important
If a panel is launched when there is high activity on projects related to that panel, those projects may experience delays and SQL timeouts. This occurs because Forsta Plus will attempt to update the panel databases with respondent transaction information as that information is input. If a panel must be relaunched while related surveys are live then you should launch at a time when activity in the surveys is at a minimum.

10.2. Registering a New Panelist

A special survey is used to register new panelists. This survey must include two scripting functions, while a third is optional though strongly recommended:

- One function must check the database before the panelist is registered to ensure the panelist is not already in the database, and close the survey if he/she is already included.
- The second function must register the new panelist's information.
- The third function can remove the panelist's details from the survey on completion of the registration to prevent the database continually growing as panelists register (as this will waste space on the server).

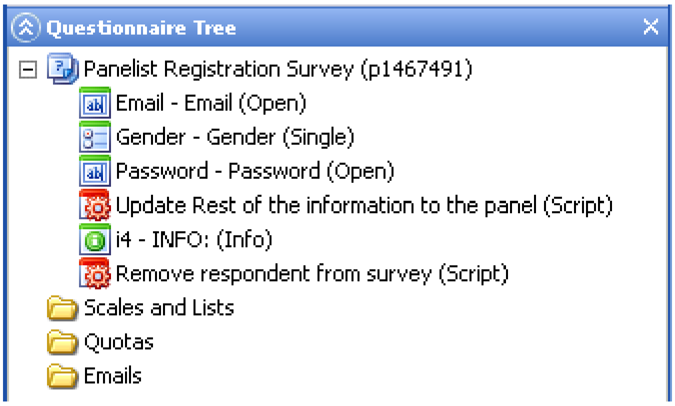


Figure 275 Example of a simple Panelist Registration survey

Note: Security standards built into Forsta Plus mean that passwords are validated according to the rules specified for the panel. The validation procedure will be run whenever a password is changed. Refer to the separate Professional Authoring User Guide for further information.

10.2.1. Checking for Previous Registration

A panelist must only be registered in a panel database once. The script shown in the figure below checks the email address of a prospective panelist against the database and closes the survey if the email address already exists. If the email address is unique, then a new row is added to the panelist database. This script is written into the Email question's **Question Details > Validation** tab.

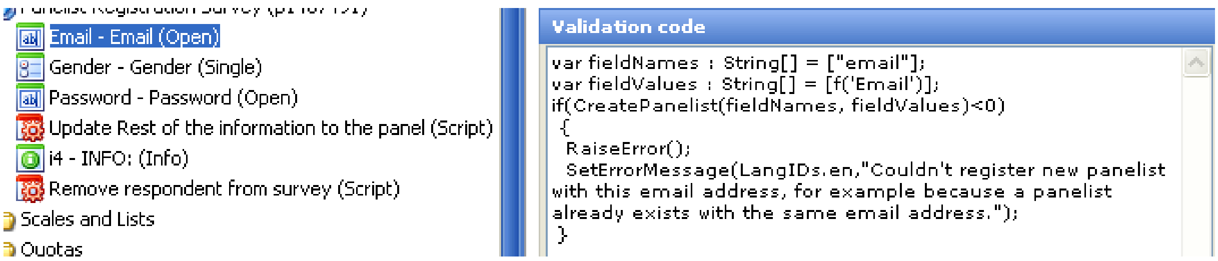


Figure 276 Example of script to check whether the email address already exists

10.2.2. Updating the Information

Once a new panelist has completed the survey, the information he/she has provided must be uploaded to the database. An "update" script, an example of which is shown in the figure below, performs this function.

Figure 277 Example of the database registration script

10.2.3. Removing the Respondent Data from the Survey

Once the database is updated, the script example in the figure below deletes all the current respondent information from the survey (not the panelist database) to prevent database overload, and then redirects the survey. The redirect script is required to prevent the survey returning an error when it notices that it contains no data for the current respondent.

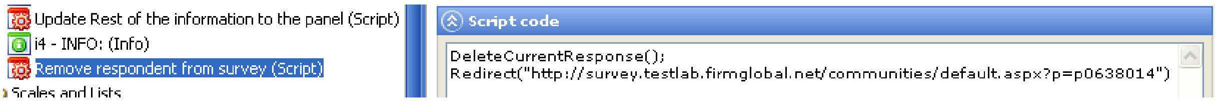


Figure 278 Example of script to delete the information from the survey

10.3. Updating Existing Panelist Information

Special surveys are used to update the panelist information. These surveys will need to contain a number of scripting objects that are used to perform particular functions within the panel database.

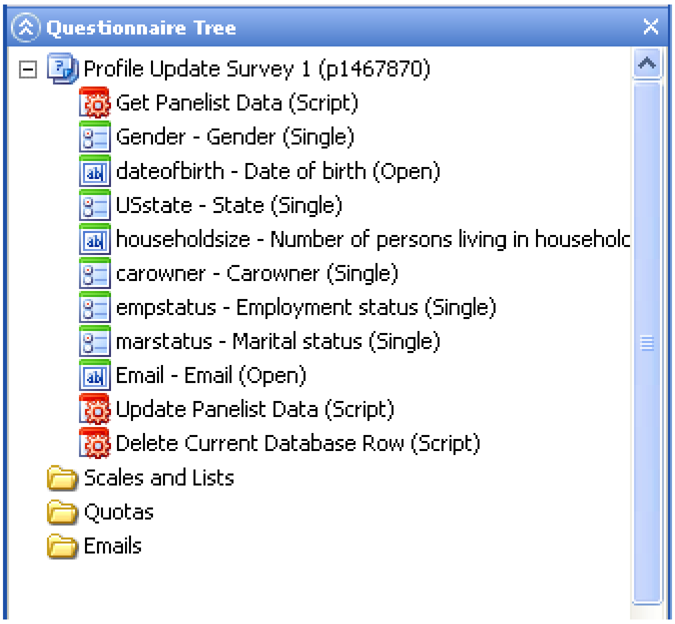


Figure 279 Example of a simple Panelist Update survey

10.3.1. Fetching the Existing Information

When a panelist wishes to update his/her information, the first operation the survey must perform is to fetch the existing data from the database. This will then be used to populate the survey so the panelist can see the current information.

Note: If the password is fetched, it can be updated but for security reasons it will be encrypted such that it cannot be read.

The first object in the survey will therefore be a script object to fetch the data. This will need a script, for example that shown in the figure below.

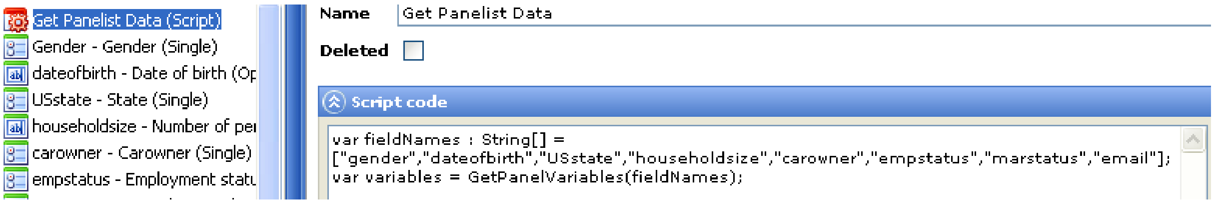


Figure 280 Example of script to fetch the data from the database

10.3.2. Updating the Existing Information

As when registering a new panelist, the database must be updated with the information. This will require an "Update" script object in the survey, containing a script such as that shown in the figure below.

```
var fieldNames : String[] = ["gender","dateofbirth","USstate","householdsize","carowner","empstatus","marstatus","email"];
var fieldValues : String[] = [f('Gender'),f('dateofbirth'),f('USstate'),f('householdsize'),f('carowner'),f('empstatus'),f
('marstatus'),f('email')];
UpdatePanelVariables(fieldNames, fieldValues);
```

Figure 281 Example of script to update existing panelist information

Note: If the password is one of the fields fetched, a validation check is performed. If the check fails, the update will not be performed. Note also that for security reasons the password will be encrypted such that it cannot be read.

10.3.3. Remove the Respondent Data from the Survey

As when registering a new panelist, once the database is updated, the current respondent information must be removed from the survey to prevent database overload. And again, a redirect script is required to prevent the survey returning an error when it notices that it contains no data for the current respondent.

```
DeleteCurrentResponse();
Redirect("http://survey.testlab.firmglobal.net/communities/default.aspx?p=p0638014")
```

Figure 282 Example of script to delete the response and redirect

10.4. Updating the Survey History Variables

You can update values in a survey history record. The only requirement here is that the survey includes a variable field called PanelistID.

```
var shFieldNames : String[] = ["SurveyStatus","SHActive"];
var shFieldValues : String[] = ["5","6"];
UpdateSurveyHistoryVariables(panelistId,jobNumber,shFieldNames, shFieldValues);
```

Figure 283 Example of script to update the Survey History Record

10.5. Standard Surveys Associated with a Panel

A regular survey is associated with a panel (see How to Attach a Panel to the Survey on page 219 for more information). An association from a job to a survey is created when the sample is uploaded to the survey using the job upload functionality within sampling. A survey is not regarded as "Open" for panelists before the invitations have been emailed, unless the job status has been specifically set to "In production" in the sample system.

There are two ways to status the information from a survey back to the panel:

- **Standard real-time update –** some fundamental fields in the panel are maintained continually up-to-date. These fields include the status of the survey, Start Date and Completed Date.

Note: Forsta Plus On-Premise customers can switch off the real-time status functionality at site level.

- **Survey rules –** this uses batch processing, usually set up to run as a recurring task. Survey rules provide much improved flexibility concerning how the panel status is maintained.

Note that both real-time statusing and batch statusing can be used simultaneously. Batch statusing (explained in previous chapters) can be specified to update the panelist fields and survey history fields based on information in the survey, panelist level information, survey history level information and limited information from the job.

Important
Surveys using batch statusing must include three "background" variables, named 'JobNumber' 'RunNumber' and 'PanelistId'. They must be added as background variables in the survey tree, and they must be included in the fields uploaded in the sample/job. JobNumber should be an open question node with a suitable field width set, while RunNumber and PanelistId must be numerical open questions with a suitable number of digits.

APPENDIX A: RESERVED KEYWORDS

The following Reserved Keywords must not be used as Question IDs in Professional Panels. In the event a listed reserved keyword is used as a variable name, the panel launch will fail.

Note: These Keywords are not case-sensitive, so for example neither "ANY" nor "any" can be used as a Question ID. Question IDs can however start with these character strings (except _), so for example "Anyone" can be used.

The Underscore (_) character (a question ID must not start with _).

A

abstract

action

aggregated

all

and

any

avg

between

boolean

break

by

byte

C

callback

case

catch

char

class

comment

con

conn

const

contains

continue

convert

count

createddate

datebetween

debugger

default

delete

do

double

else

enum

env

eq

extends

false

final

finally

float

floor

for

function

ge

goto

group

gt

if

implements

import

in

instanceof

int

interface

interview_end

interview_start

interviewer

interviewerid

in_use

isfalse

istrue

iterationid

l (except for use under special conditions

L (except for use under special conditions

last_handled

le

long

lt

native

ne

never_again

new

none

noofemailssent

not

not_in_quota

notin

null

or

order

package

page

panelid

panelist_created_date

panelistid

panelist_modified_date

private

projectid

protected

public

PValDate

PValInHier

PValNum

PValStr

PValStrArr

R

recoding

respid

responseid

return

rid

right

rolling

round

rowguid

S

sample_category

select

short

smtpstatus

source_projectid

source_responseid

state

static

status

string

super

switch

synchronized

this

throw

throws

to

todate

transient

tries

true

try

typeof

unique_sourceid

var

void

volatile

while

with

The following can only be used in respondent lists:

userid

password

language

APPENDIX B: SUPPORTED FUNCTIONALITY FOR PROFESSIONAL AND STANDARD PANELS

The table below shows which functionality is available for Standard and Professional Panels.

	Standard Panel	Professional Panel
Set Up		
Panel Designer	X	X
Doc2Panel	X	X
Support for multiple languages	X	X
Portal	X	X
Linked surveys (registration, profile update, sample surveys)	X	X
Flex support	X	X
Panel Management		
Panel Rules	X	X
Single Panelist Editor	X	X
Data edit access control		X
Multiple Panelist Editor		X
Data Export/Import	X	X
Recoded variables	X	X
Aggregated variables	X	X
Panelist credits import/export	X	X
Sample Management		
Sample Job	X	X
External fields		X

Project Exclusion	X	X
Date Exclusion	X	X
Manual Job Exclusion	X	X
Manual Panelist Exclusion		X
Category and Property Exclusion		X
Sample Job Filter	X	X
Scheduling		X
Sample by Expected Return		X
Individual Rest Days		X
Sub Samples		X
Sample Matrix	X	X
Original cellweights		X
Dynamic Targets	X	X
Concurrent Sampling		X
Multiple Sample Upload		X
Set Sample File Fields	X	X
Tester template list		X
Disregards in Future Date Exclusions	X	X
Incidence and Completion Rate	X	X
Survey synchronization		X
Sample Augments		X
Sample Fill-in		X
Job Approval		X
Output rules and posting rules		X
Job Definition Report		X
Outgo Report	X	X
Crosstab Report		X

Reporting		
Reportal	X	X
OLAP Reporting		X

APPENDIX C: PANEL FEATURES

Panel Setup	
Legacy Jobs Import	Company administrators can import legacy jobs from other panel systems into Professional Panel. These jobs can then be used for exclusions in sampling, and for aggregated variables. This would normally be used when migrating from another panel system to a Professional Panel. After the migration further imports of legacy jobs are normally not needed. (see Legacy Jobs Import on page 27 for more information)
Panel Utilities	
Panel Activity Log	Gives access to a log of all activities performed on the panel, including job execution, sample uploads and rule executions. The log helps panel managers and other panel users obtain an overview of the activity in the panel, which will help when maintaining the panel. (see The Activity Logs Tab on page 69 for more information)
Database Cleanup	This function completely removes deleted questions/columns, and the associated data, from the panel database. When deleting objects in a panel, the data for the objects will be kept in the panel database. The data will not be deleted before you run a Database Cleanup. (see Survey Synchronization on page 72 for more information)
Panel Management	
Aggregated Variables	Aggregated variables can be used to create aggregations of survey history and credit history records. These aggregations can then be used in for example sampling or in panel rules. For example, an aggregated variable could be used to store the total number of surveys each panelist has completed. That can be used in reporting, sampling, or rules to calculate the panelist’s historical response rate. (see Aggregated Variable List on page 98 for more information)
Multiple Panelist Editor	The Multiple Panelist Editor allows users to create functions to update several panelists in one operation. This is normally used for batch updates of panelists when you need to change the value of a variable for a number of panelists. The same goal can be achieved using a panel rule, but the Multiple Panelist Editor provides a warning to tell you how many panelists will be updated before actually doing the update. (see Multiple Panelist Editor on page 106 for more information)
Rules	Rules are used to create data processes that manipulate the panel data. For example, you can use a recurring rule to calculate a panelist's age based on the date of birth. When the age is calculated you can then write it back to the panel data. Rules can also be used to among other things import and export panel data. (see Rule List on page 94 for more information)

Rule Set	Rule sets can be used to group panel rules so that they run consecutively and as one process. For example, rule sets can be used to group together data update rules and BitStream generation rules. If you run an age calculation rule every night and write the age back to the panel data, you will probably want to run a BitStream generation rule afterward to make sure the updated ages will be used in sampling. You can then create a rule set of the data processing rule and the BitStream generation rule, which results in one task to manage rather than two. (see Rule Set List on page 97 for more information)
Sample Management	
Scheduling	Provides access to a list of the sampling jobs awaiting execution, and provides the ability to change the processing order of the jobs. This can be useful to ensure that focused samples are run first if a series of samples are to be run. For example, if you have one sample targeting female professors in the Boston area and a second sample targeting all American females, you would want the more focused Boston female professors sample to run first. This will ensure that the Boston female professors are not used in the American females sample, leading to shortages in the Boston sample. (see Scheduling on page 195 for more information)
Concurrent Sampling	The Concurrent Sampling functionality processes multiple sample selection jobs simultaneously. Each job will have a different selection criteria and structure, with different target sample counts, based on output or returns, and will make the trade-offs when allocating scarce panel resources. The result in this case will be that scarce resources are allocated fairly across multiple sample jobs. (see Concurrent Sampling on page 198 for more information)
Multiple Sample Upload	Upload multiple sample jobs simultaneously to a survey. If you have run a series of independent samples, you can use this functionality to upload all these samples to one project in one operation. (see Multiple Sample Upload on page 200 for more information)
Tester Template List	Users can add additional rows to the respondent table in a survey on sample upload. The rows can be populated with dummy respondents that can be used for testing the survey. (see Tester Template List on page 201 for more information)
Survey Synchronization	Users can run a panel rule to check all surveys associated with the current panel, and update the panel if/when there are changes in the survey data. This keeps the panel SurveyHistory data up-to-date so samples can be selected appropriately, and allows you to apply advanced business logic on data collection results. (see Survey Synchronization on page 72 for more information)
Job Approval	Set whether jobs will have to be approved by a manager before they can be uploaded to a survey. (see How to Execute a Job on page 151 for more information)
Disregard in Future Date Exclusions	This is a setting applied on job execution which allows you to specify that sample is not to be excluded in future samples based on date exclusions. (see The Job Execution Area on page 150 for more information)
External Fields	Allows users to upload additional information on the individual panelists in a job. The additional information is uploaded to the job in a text file.

	This feature is used when there are additional background fields needed in a survey that are not or should not be uploaded to the panel database directly. (see The Data Fields and Areas on page 126 for more information)
Manual Panelist Exclusion	Allows you to exclude selected panelists from the sample. The panelists are specified in a text file containing a PanelistId column with the panelist ids of the panelists to be excluded. (see The Manual Panelist Exclusion Tab on page 132 for more information)
Sampling - Output Rule	A rule used to format the output of a sampling job. The rule allows you to for example specify the format of output variables, run scripts on the output data, and create aliases for the sample file headers. (see The General Tab on page 203 for more information)
Sampling - Posting Rule	When a sample is posted to a survey you can run a data processing rule. This rule can be used to update panel data and/or SurveyHistory data for the panelists in the sample. For example, you might have a custom survey history variable called sh_age. This should be populated with the age of the panelist at the time he/she was sampled to a survey. You can then use a posting rule to set the sh_age variable from an age variable in the panel data. (see The General Tab on page 203 for more information)
Advanced Sampling Algorithm Settings	Advanced Sampling Algorithm contains three functions for sampling; the ability to set Sampling Algorithm, Dimension Collapsing Handling, and Support Overlapping Segments. Sampling Algorithm: Allows you to specify the sampling algorithm to be used for single job execution. The options are Sequential Sampling and Concurrent Sampling. Sequential Sampling will be default if the feature is disabled. Dimension Collapsing Handling: By default, Forsta Plus will collapse similar dimensions (dimensions with similar segment expressions) in the new combined matrix as this will minimize the complexity of the combined matrix. Using this property you can select to collapse only dimensions that are identical. Support Overlapping Segments: When running Concurrent Sampling, a new combined matrix will be set up to include all the dimensions in the different jobs. Similar dimensions (dimensions with similar segment expressions) will be collapsed according to the Dimension Collapsing Handling setting selected. If Dimension Collapsing Handling is set to "Identical" and "Support Overlapping Segments" is not enabled, only the overlapping parts of the similar dimensions will be available for sampling. (see The General Tab on page 203 for more information)
Expected Return Variable	Each panelist can be given a grade for the probability that he/she will reply to the questionnaire. This probability can be used in sampling to calculate how many panelists must be selected to ensure the required number of responses. (see The Execute Job Properties on page 199 for more information)
Individual Rest Days	Numeric variable in the panel data which specifies a required number of “rest days” for the individual panelists. The panelists will then be excluded from any samples for the number of days specified. (see The General Tab on page 203 for more information)
Active Job List	A list of all sampling jobs currently in production, i.e. the sample is run but the panelists are not yet invited to respond. (see Active Job List on page **Error! Bookmark not defined.** for more information)

Sub Sample Groups	Sub Sample Groups enable users to split a Sub Sample into smaller groups which the sampling algorithm will attempt to balance as much as possible based on the sampling matrix, so that each group becomes as representative as possible for the total Sub Sample. Users could pre-assign panelists into these groups so that if product testing needs to be done and different groups of respondents need to test different products but also be as representative as possible of the overall sample, the grouping functionality can be used for pre-assignment rather than having a random draw which could potentially give some bias.
Advanced Exclusion	Advanced Exclusion includes three functions for exclusions; the ability to exclude all panelists, to include a specific sample, and to set which status will be excluded for category, date and property exclusions. Exclude All Panelists: Will exclude all panelists from the sample. You will then have to manually include another sample to get panelists in this sample. Can for instance be used to send follow-up surveys to people sampled to a previous survey. Include Job: Can be used in Manual Job Exclusion to include panelists from a previous job in this one. Status on exclusions: Can be used to set a status that will be the only one excluded in Category, Date and Property exclusion. This can for instance be used to only exclude panelists that have completed a survey in the given date exclusion range. (see The Exclusions Tab on page 129 for more information)
Category Exclusion	Samples jobs can be categorized and these categories can then be used in exclusions when running sampling. For example you might want to categorize samples on the topic of the survey. This can then be used to make sure respondents are not sampled to a lot of surveys on the same topic in a short period of time. (see The Auto Job Exclusion Tab on page 129 for more information)
Property Exclusion	Panelists who have been sampled to jobs with particular properties can be excluded. Only one property can be used to exclude panelists. For example, you might create a sampling property called Duration. This can be used by the person doing the sampling to indicate how long a survey takes to complete, and the property has the values Short, Medium, and Long. You do not want panelists to get long surveys too often, since that might demotivate them. You can then use property exclusion to make sure people are excluded from long surveys for a period of time after being sampled to one. (see How to Set the Property Exclusion Function on page 135 for more information)
Original Cellweight	You might have specified a particular cell weight that they want for a survey. However, it might not be possible to meet this requested cell weight because you do not have enough panelists available to meet the requested selection criteria. In this situation the cell weight might be changed to enable the job to be completed. The Original Cellweight property allows you to store the cellweight originally requested for the sample, and include it in the outgo reports for the sample for comparison. (see The Sub Sample Editor Page on page 142 for more information)
Sub Sample	Within one sample you might have different groups that should be sampled with different targets, different matrices etc. This can be done by using sub samples. For example, let's say you are using one sample job to sample to panelists from different countries. For each of the countries you want to use that country's nationally representative matrix. This can be done using sub samples. (see The Sub Sample Editor Page on page 142 for more information)
Advanced Sample File Handling	Advanced Sample File Handling contains two functions; Rebuild Sample File and Export Sample File.

	Rebuild Sample File: Will regenerate the sample file to include new columns, but without selecting new panelists. This can be used for example if you have created a sample file but need to add or change variables. Export Sample File: Once a sample file is created it can be exported. It will be exported as a tab delimited text file. This can be used if you want to manually upload the sample file, for instance if you want to upload it to a project on another server. (see The Job Runs Area on page 151 for more information)
Sample Augment	Augments can be used to automate the process of making sure quotas are met in surveys. This is done by augmenting the sample to a survey after a given number of days. For example, if you need 1000 completes in a survey you will probably start by creating a sample of 1000 panelists. However there is a good chance that not all of the panelists will reply, leaving you with perhaps only 600 completes. You can therefore set up the Augment functionality such that after a specified period, additional samples are created and invites emailed so that you will receive the desired total of 1000 completes at the end of the survey period. (see The Augment Sample Properties Page on page 158 for more information)
Export Job List	Exports the list of jobs. This will export the list as a tab delimited text file. (see Job List on page 188 for more information)
Job Definition Report	The job definition report specifies the job definition at the moment the job run was executed. This can be used to check the parameters of the job run at the time of execution. (see The Definition Report on page 170 for more information)
Crosstab Report	The Crosstab Report allows you to create a report on the fields included in the sample file from a job run. The report will reflect the data as it was when the sample file was created. (see The Crosstab Report on page 169 for more information)
Sample Fill-in	If a run does not find the required sample using the specified weight set, you can execute a "topping-up" run for which weights are recalculated automatically to generate the required total sample. The Sample Fill-in will be run with a later mailing date than the original sample, which means new panelists can potentially be available for the sample. This can be used to make sure you reach the desired quotas in your projects. (see How to Generate Sample Fill-in on page 160 for more information)
Sample File Preview	Provides an overview of the first 10 panelists in the sample file so you can check that the file is correct. (see The Job Runs Area on page 151 for more information)
Property Definition	Properties can be defined in the panel. Properties can be used to categorize jobs. The properties can then be used in for example sample exclusions. (see The Property Definitions Tab on page **Error! Bookmark not defined.** for more information)
Permissions	
Data edit access control	The panel administrator(s) can give the panel users an individual data edit access. This access permission has three levels; low, medium and high. In the panel designer the panel administrators can set access permission levels on each individual variable in the panel. Each variable can be given a low, medium or high access level. Once set the panel users can only edit data in variables where the permission is equal or lower than the permission set on their user.

	(see Access Permission Levels on page 33 for more information)

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